



# YellowFolder

The Education Documentation Experts

## Becoming an Upload Guru

# Objective



This course is designed to help users become a master at uploading documents to the system, including the most efficient upload tool for various situations. Users will be required to attend three short live webinars, upload documents using the various upload methods, and meet with a PNE over the duration of the course.

During the course, the user will learn how to...

- Use the Scan & Upload tool to upload documents
- Use the Virtual Printer to upload documents
- Use the Droplet to upload documents

# Scan & Upload



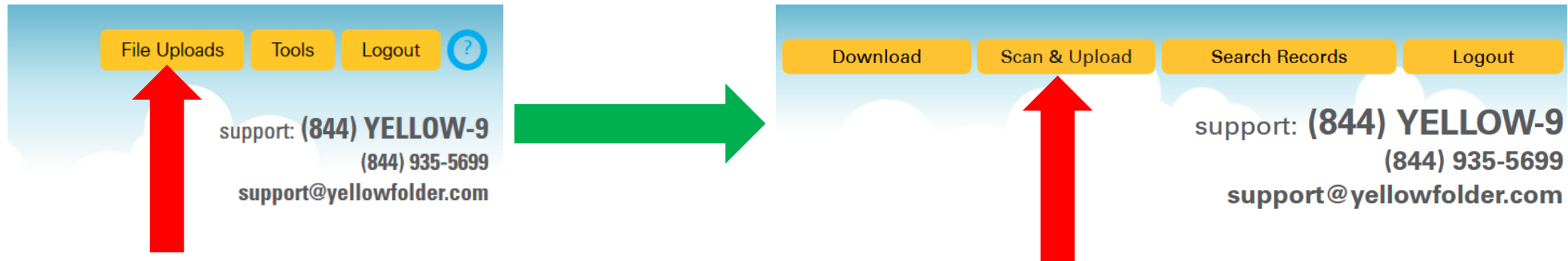
The Scan & Upload tool is a 2-in-1 upload feature.

Feature 1: Using a scanner attached directly to your computer to scan documents directly into the system and upload.

Feature 2: Can be used two ways, by scanning native paper documents from a scanner (not directly attached to computer) and saving to your computer to upload. Or by saving native digital documents to your computer and uploading. Both methods are like attaching a document to an email.

This feature allows the user to split multiple documents for one person or multiple people and merge documents together.

To use this tool:



**Attend the Scan & Upload Live Webinar at <https://www.yellowfolder.com/weeklytraining/index.html>**

# Checkpoint 1 - Scan & Upload



Schedule individual time with a PNE to share documents uploaded using the Scan & Upload tool.

*Prior to meeting with PNE, upload 25 documents using the Scan & Upload tool.*

1. Show a PNE the uploaded documents in your dashboard.
2. Demonstrate how to split and merge documents using Scan & Upload.
3. When uploading multiple students or employees in Scan & Upload, how many employees or students can be uploaded into the grey staging area at once?

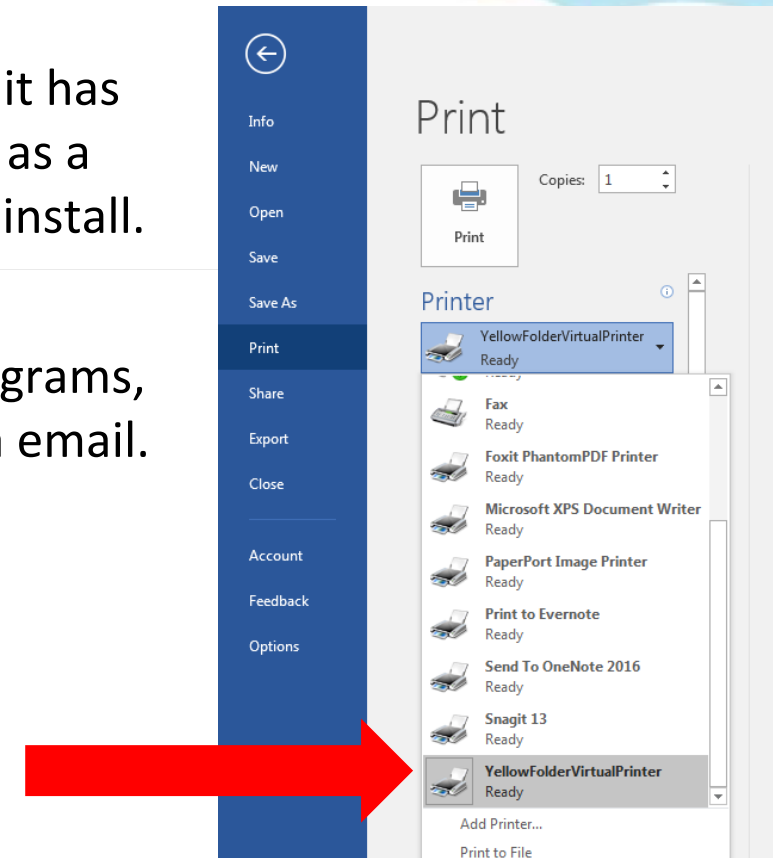
# Virtual Printer



The Virtual Printer works like a regular printer. Just like any printer it has to be installed on your computer. If you do not have Virtual Printer as a printer option for printing, contact your Technology Department to install.

Virtual Printer allows the user to print automatically from other programs, from digitally saved documents, or from a document sent to you via email.

**Attend the Virtual Printer Live Webinar at**  
<https://www.yellowfolder.com/weeklytraining/index.html>



# Checkpoint 2 - Virtual Printer



Schedule individual time with a PNE to share documents uploaded using the Virtual Printer.

*Prior to meeting with PNE, upload 25 documents using the Virtual Printer.*

1. Show your PNE the uploaded documents in your dashboard.
2. Do you have to be logged into the website to upload documents using the Virtual Printer?
3. Identify a situation where it might be best to use the Virtual Printer over the other upload methods.

# Droplet



The Droplet is an upload method that allows the user to easily drag and drop documents into the system.

This feature allows users to upload multiple files for same person at one time and upload multiple documents to multiple folders.

This feature is beneficial for users with access to more than one record series because the user can designate which record series specific documents belong to.



**Attend the Droplet Live Webinar at**

<https://www.yellowfolder.com/weeklytraining/index.html>

# Checkpoint 3 - Droplet



Schedule individual time with a PNE to share documents uploaded using the Droplet.

***Prior to meeting with PNE, upload 25 documents using the Droplet.***

- 1. Show your PNE the uploaded documents in your dashboard.**
- 2. Do you need to be logged into the YellowFolder website to upload documents using the Droplet?**
- 3. Identify a situation where it might be best to use the Droplet over the other upload methods.**



# Support/Resources



# YellowFolder

Questions, Problems?  
We're here for YOU.



**Support** 214.431.3600 (dial 2) • [support@yellowfolder.com](mailto:support@yellowfolder.com)

Contact Support for:

- General questions about using YellowFolder
- Software support
- YellowFolder Tool(s) Support (DropIt, Virtual Printer, Scan & Upload)
- Assistance finding digitized documents
- Remote virtual training
- CSV file related items
- Matriculation related items
- User access related items



**Record Retrieval** 214.431.3600 (dial 2) • [recordrequest@yellowfolder.com](mailto:recordrequest@yellowfolder.com)

Contact Record Retrieval for:

Retrieving non-digitized documents. These are generally documents YellowFolder is only storing in the warehouse (never been digitized). However, this also applies to documents that have not been digitized yet (open project).

\*Completion of a Records Request Form is necessary for prompt retrievals. The form can be obtained by contacting [support@yellowfolder.com](mailto:support@yellowfolder.com) or [recordrequest@yellowfolder.com](mailto:recordrequest@yellowfolder.com)



**Paperless Nation Engineer (PNE)** Each PNE member has their own contact information.

About Paperless Nation Engineers:

- Educational Consultant for a smooth transition to YellowFolder
- Creation and modification of your unique File Structure
- Guidance in implementation and procedure planning to incorporate the culture change necessary to go paperless
- On-site and virtual trainings (both initial and refreshers) to ensure users understand how to best utilize YellowFolder
- On-going assessments of the implementation and usage of YellowFolder to inform your Administration and provide support



**Accounting** [accounting@yellowfolder.com](mailto:accounting@yellowfolder.com)

Contact Accounting for: All billing/invoice related questions

# Course Completion Submission for Certificate



Fill out the Course Completion Submission form and submit it to [awatts@yellowfolder.com](mailto:awatts@yellowfolder.com) to obtain the course certificate.