



YellowFolder

The Education Documentation Experts

Welcome to Virtual Printer Training

PNE Name, Paperless Nation Engineer

***Please ensure you have used the phone dial in method for audio for this training.
If you have signed in via your computer audio, please switch to your phone audio.***

Seven Simple Questions



1. Do you know how to print a document?
2. Do you know how to scan a document?
3. Have you ever attached a document to an email?
4. Have you ever dragged and dropped a document into a folder on your computer?
5. Have you ever searched through a file tree on your computer?
6. Have you ever searched in Google?
7. Have you ever refined a search on Amazon?

If you can do these you can use YellowFolder like a pro!

Let's rate your computer skills, how savvy are you with technology?

Uploading Documents

There are four ways to upload documents to YellowFolder:

- 1) **Using the Virtual Printer**
- 2) Using the Droplet
- 3) Using Scan
- 4) Using Upload

Which do I use?

It depends on what you are uploading and personal preference...

Virtual Printer – Logging into the Tool



YellowFolder

Let's Get Started

Login with your YellowFolder username and password to begin uploading documents.

koglesby.dms@yellowfolder.com

Password

Remember me

Forgot Password

Submit

HINT: The “Forgot Password” feature will aid in resetting the password if it is forgotten.

The user will click the “Submit” button after typing in the username and password.

Droplet – Current Tool



Click “Help”, then click “Check for Updates” to ensure you have the most current Droplet and Virtual Printer – Tool Dashboard.



Let's Get Started

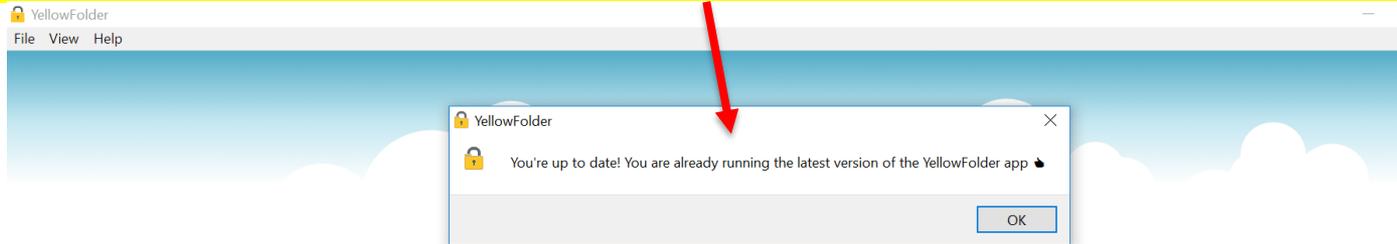
Login with your YellowFolder username and password to begin uploading documents.

Remember me [Forgot Password](#)

Droplet – Current Tools, Cont.



A pop-up will appear to indicate whether you have the current version of tools. If not, you will be prompted to update your Tool Dashboard.



Let's Get Started

Login with your YellowFolder username and password to begin uploading documents.

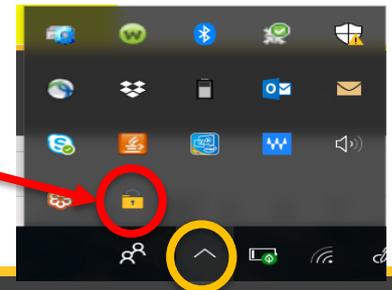
ttyler.dms@yellowfolder.com

Password

Remember me

[Forgot Password](#)

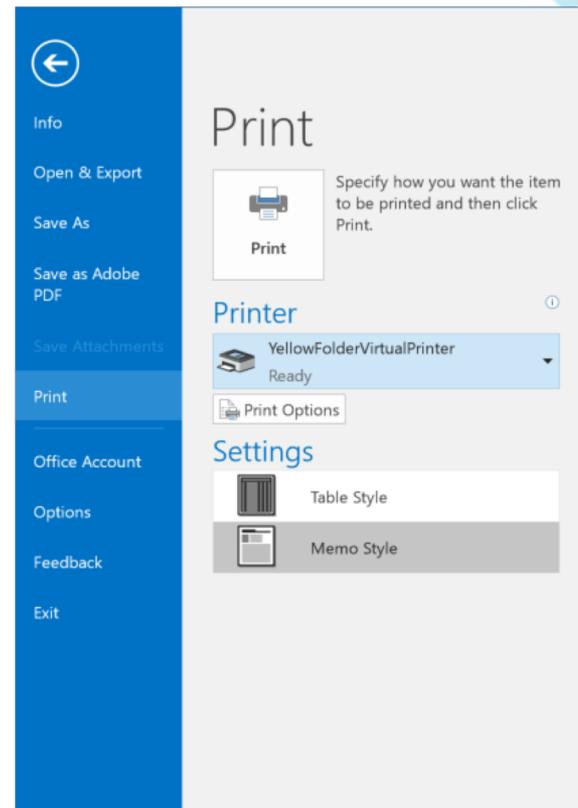
HINT: Once you log into the tools, the application will continue running in order to finish processing, especially Virtual Printer uploads. Due to a Windows issue, find the tools icon in the system tray to “re-store” the tool’s window.



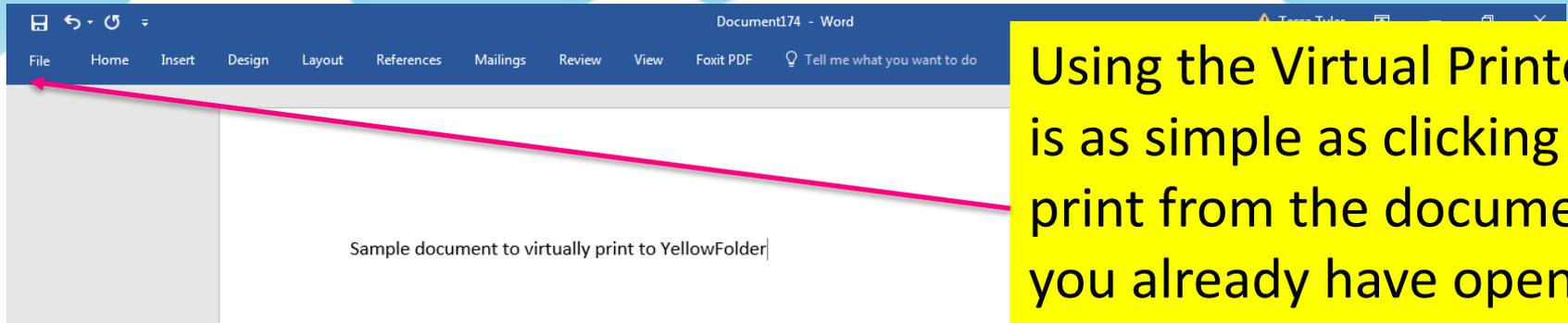
Virtual Printer - Uploading Documents



Watch a live demonstration in the YellowFolder system of how to use the Virtual Printer tool

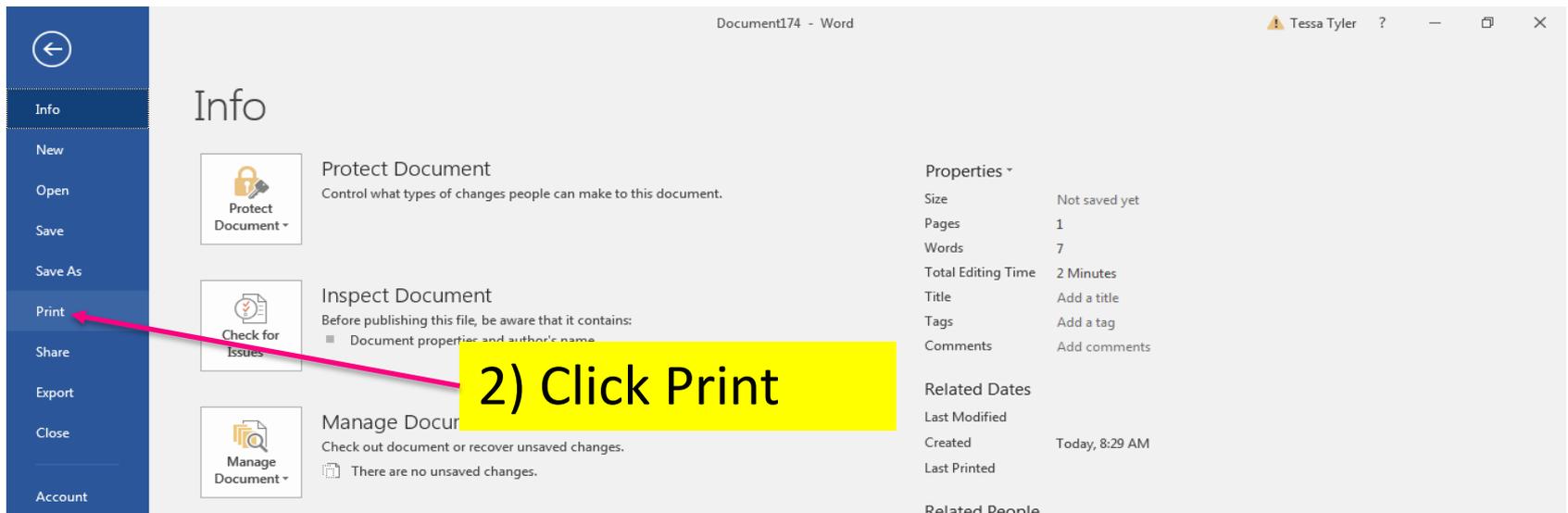


Uploading Documents



Using the Virtual Printer is as simple as clicking print from the document you already have open.

1) Click File

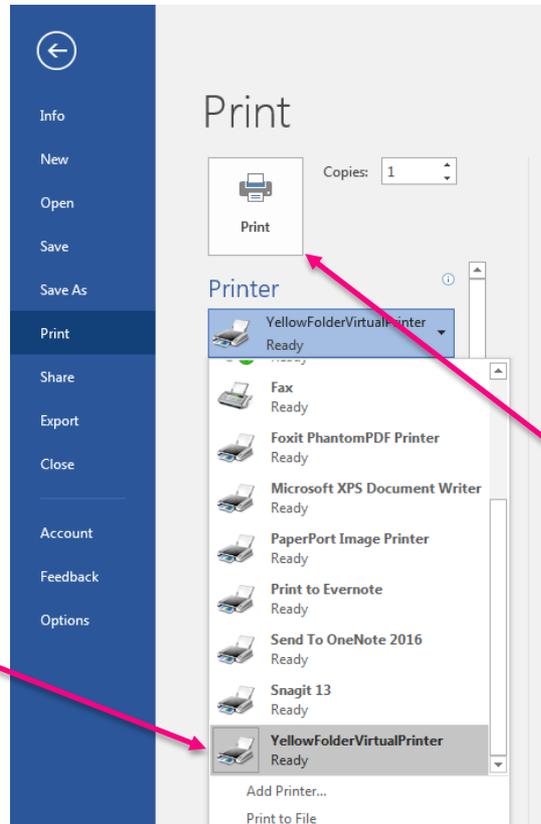


Uploading Documents



Using the Virtual Printer

3) Choose YellowFolder VirtualPrinter from the printer drop down menu

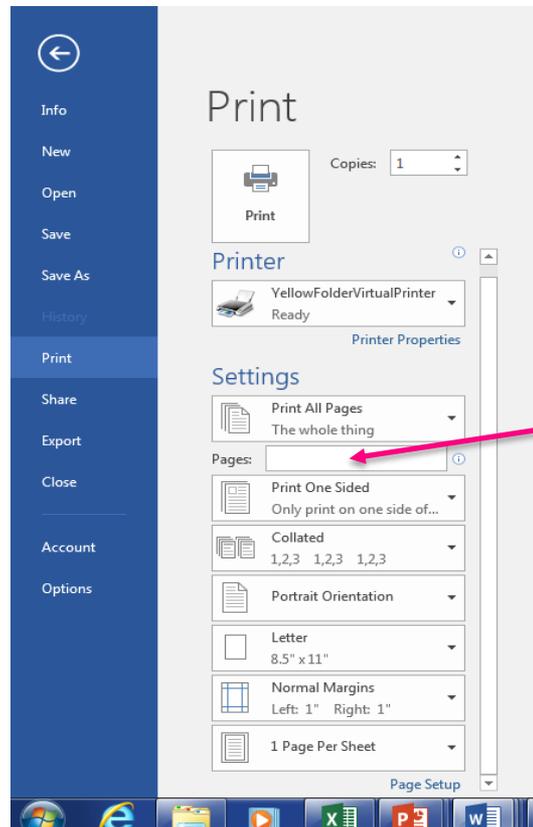


4) Click Print button

Uploading Documents



Print



* May select specific page ranges if not needing to upload an entire document or if needing to break up a document

Uploading Documents



Print

You can access a list of recently printed documents by clicking on the Recently Printed Documents tab from your Tool Dashboard.

The screenshot shows the YellowFolder web application interface. The browser window title is 'YellowFolder' and the menu includes 'File', 'View', and 'Help'. A 'Logout' link is in the top right. The main content area is divided into two columns. The left column contains navigation options: 'Droplet' with a sub-menu of 'Student Records', 'Special Education Records', 'Employee Records', and 'Administrative Records'; 'Virtual Printer' with a 'Recently Printed Documents' tab; and 'YellowFolder' with search and training session options. The right column features a 'My Activity' line graph showing activity levels over 20 days, a 'Welcome Beta Users!' announcement, and a 'Notifications' section for 'Version 3.2.32-beta'.

Day	Activity Level
1	0
2	0
3	0
4	0
5	16
6	0
7	0
8	0
9	0
10	9
11	0
12	2
13	0
14	0
15	0
16	0
17	0
18	0
19	0
20	0

Uploading Documents



Print

YellowFolder
File View Help

Tool Dashboard Logout

Virtual Printer

Filename	Date Uploaded	View	Download
FSA-Enrollment-Form_HR 12222016_1.pdf	12/19/2018 8:44 am		
Certificate_HR 12222016_1.pdf	12/19/2018 8:44 am		
SummativeEvaluationForm_HR 12222016_1.pdf	12/19/2018 8:44 am		
Transcript_HR 12222016_1.pdf	12/19/2018 8:44 am		
Benefits application_HR 12222016_1.pdf	12/10/2018 10:43 am		
Certificate_HR 12222016_1.pdf	12/10/2018 10:43 am		
Benefits application_HR 12222016_1.pdf	12/10/2018 8:36 am		
Employment Application_HR 12222016_1.pdf	12/10/2018 8:36 am		
I-9_HR 12222016_1.pdf	12/10/2018 8:36 am		
FSA-Enrollment-Form_HR 12222016_1.pdf	12/10/2018 8:36 am		

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- From the list, you are able to:
- View recently printed documents
 - Download recently printed documents

Uploading Documents



Print

Filename	Date Uploaded	Preview	Download
FSA-Enrollment-Form_HR 12222016_1.pdf	12/19/2018 8:44 am	👁	📄
Certificate_HR 12222016_1.pdf	12/19/2018 8:44 am	👁	📄
SummativeEvaluationForm_HR 12222016_1.pdf	12/19/2018 8:44 am	👁	📄
Transcript_HR 12222016_1.pdf	12/19/2018 8:44 am	👁	📄
Benefits application_HR 12222016_1.pdf	12/10/2018 10:43 am	👁	📄
Certificate_HR 12222016_1.pdf	12/10/2018 10:43 am	👁	📄
Benefits application_HR 12222016_1.pdf	12/10/2018 8:36 am	👁	📄
Employment Application_HR 12222016_1.pdf	12/10/2018 8:36 am	👁	📄
I-9_HR 12222016_1.pdf	12/10/2018 8:36 am	👁	📄
FSA-Enrollment-Form_HR 12222016_1.pdf	12/10/2018 8:36 am	👁	📄

You can search documents in YellowFolder by clicking Search Records in Browser.

You can view and register for our weekly live training sessions by clicking View Weekly Training Sessions

Uploading Documents



*Your turn to open a document, go to print and view how easy it is to use the VirtualPrinter. Recommend **NOT** using this unless you have actual documents to upload into the system.*

Any Questions or Additional Support/Training Needed



To learn more about the features in YellowFolder, go to www.yellowfolder.com and click on **Training** for a list of Weekly Live Training Sessions available each week. Simply register and you will receive an invitation to attend the virtual session from your desk.

Any Questions or Additional Support/Training Needed



Questions, Problems?
We're here for YOU.



Support 214.431.3600 (dial 2) • support@yellowfolder.com

Contact Support for:

- General questions about using YellowFolder
- Software support
- YellowFolder Tool(s) Support (*Droplet, 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

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 or 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

Contact Accounting for: All billing/invoice related questions

PNE Contact Information



- ▶ PNE- Enter Name

- ▶ Enter phone number

- ▶ xxxx@yellowfolder.com

- ▶ Address:

1617 W Crosby Road Suite 100

Carrollton, TX 75006