

## Search

- 1) Enter identifiers, such as last name, first name and topic to search. Use quotes around identifiers that need to be found together, i.e. "service record"
- 2) Click Search button.
- 3) Search results will show in Document List.
- 4) Click View button to view the document.
- 5) *Option* - Can use additional search field with icon to search within the document.

## Advance Search

- 1) Click Advance Search button.
- 2) Choose desired information from criteria buttons. Can select multiple criteria in any combination.
- 3) Fields will appear for chosen criteria.
- 4) Enter information in fields.
- 5) Search results will show in Document List.
- 6) Click View button to view the document.
- 7) Click Submit button.
- 8) Can use additional search field with icon to search within the document.
- 9) Click Back to Document List.

## Archive Search

- 1) Enter identifiers, such as last name, first name and topic to search. Enter identifiers, such as last name first name and topic to search. Use quotes around identifiers that need to be found together, i.e. "service record"
- 2) Click Search button.
- 3) Search results will show in Document List.
- 4) Click View button to view the document.
- 5) *Option* - Can use additional search field with icon to search within the document.
- 6) Click Back to Document List to go back to list.

## Box Search

- 1) Click on Box Level
- 2) Enter identifiers, such as last name, first name and/or topic in Search box to search the boxes. Use quotes around identifiers that need to be found together, i.e. "service record".
- 3) Click Search button.
- 4) Once results appear use the any additional search perimeters (Box Number, Description, Date Ranges...) to narrow down that search, as applicable or skip this step.
- 5) Click the plus sign beside the box that closest fits the search. Reviewing the places where the search results are highlighted will help narrow the search.
- 6) Once the most likely box is determined, click View button to open the box.

## Box Search Cont.

- 7) When the box document opens, use the search feature (🔍) within the viewer tool to further narrow down the search. Use the original search.
- 8) Check Highlight All checkbox, in the viewer tool, to have the 'search words' highlighted.
- 9) Click the forward/backward arrows, in the viewer tool, to tab to the areas within the box document that have the 'search words'.
- 10) To search through another box, click Back button to go back to the search list of boxes.

## Additional Options

After opening the document the following options are available:

### Bookmark:

- 1) Click grey flag beside the document name.
- 2) Flag will turn pink and document will be added to your home screen under Bookmark section.
- 3) Once in that section, simply click document name to view.

### Split:

- 1) Click Split Document button on right of screen.
- 2) Pop-up screen will open, click page(s) desired to split.
- 3) Verify or change drop down for Document Type field.
- 4) Verify or change name of person field.
- 5) Click Split button.
- 6) Repeat process for remainder of page(s).

### Download:

- 1) Click Download Document button.
- 2) Pop-up screen will open, click the Download button.
- 3) Document will download as a pdf.

### Edit Metadata:

- 1) Click Edit Document Metadata button.
- 2) Verify or change Person Data, person's name, field.
- 3) Verify or change Document Type field.
- 4) Verify or change Document Date field.

## Share

When document(s) desired to be shared are in Document List –

- 1) Check small box beside name of document(s) in list desired to be shared.
- 2) Click Share Document button.
- 3) Pop-up screen will open, click appropriate radio button on method to share.
- 4) *Option 1* – Share Privately: Click button when sharing with those who are YellowFolder users.  
*Option 2* – Share Publicly: Click button when sharing with those who are NOT YellowFolder users.
- 5) Enter date for link to expire in Expires date field.
- 6) If want to allow download of document, then check Allow Download box.
- 7) Click Next button.
- 8) Enter email address of recipient in To field.
- 9) Enter information in Subject field.
- 10) Revise body of email as desired.
- 11) Click Send button.

## Check Out

- 1) Open the document to be checked out.
- 2) Click Check Out icon above document opened (🔒).
- 3) Click Check Out button.
- 4) Document will automatically download to be opened from Download folder.
- 5) Open downloaded document, complete necessary activities and save document using "Save As".
- 6) To view documents checked out, go to Home Screen, document will be listed in Checked Out Document section.

## Check In

- 1) Find the document to be checked in from the Checked Out Document section on the Home Screen.
- 2) Click the arrow beside the document to open that document.
- 3) Click Check In icon above document opened (🔓).
- 4) Click Upload New Version radio button.
- 5) Click Browse button and find the saved version of the document on your computer, double click document to attach.
- 6) Document name will appear in Browse window.
- 7) Click Check In button.
- 8) Verification pop-up of "New file is checked in." will appear.

## Virtual Printer

- 1) Open document to save into YF.
- 2) Choose "Print" from the document.
- 3) Choose YellowFolder Virtual Printer from printer drop down menu.
- 4) Click Print button to complete saving to YF.

**NOTE:** View recently uploaded documents via Virtual Printer in the Recently Printed Documents under Virtual Printer on Droplet/Virtual Printer Tool. Those documents can be viewed from this list.

## Droplet (Update 2019)

- 1) Sign into the Droplet Tool.
- 2) Locate the folder/email the documents are in on your computer.
- 3) Choose the record series (if have more than one) by clicking the appropriate box to open the appropriate series.
- 4) Either drag and drop the documents to be uploaded into the upload area or use Select File to choose files, like including an attachment.
- 5) The tool screen will change format and list documents by the title assigned (not the YellowFolder given name) and give a progress bar. Also, two Batch Type options are available for uploading – Single Person or Multiple Persons.
- 6) Click the appropriate button for Batch Type. Droplet now accepts documents from multiple people in the same batch, click Multiple Person for this option.
- 7) Click Submit Batch button and watch the Progress bar begin to upload the documents.

**NOTE:** View recently uploaded documents via Droplet in the list above. Those documents can be viewed from this list.

## Droplet (Prior to 2019)

- 1) Open the folder/email the documents are in on your computer.
- 2) Open the Droplet Tool.
- 3) Choose the record series by clicking the appropriate box to open that box.
- 4) Click the plus sign to open a box for each person you will be uploading documents on.
- 5) Click on one of the boxes added to open that drag and drop box for more information.
- 6) Drag the document(s) from your computer's folder by:
  - A) Find the document(s) for that person, select the document(s) and hold
  - B) Drag across to the Droplet open drag and drop box.
  - C) When over the drag and drop box, let go of the document(s).
- 7) When check appears in corner of box, click Upload Folder button to complete saving to YF.

## Upload

- 1) Log onto YellowFolder.
- 2) Click File Upload button.
- 3) Click Scan & Upload button.
- 4) Click Choose File button to browse your documents.
- 5) When folder window opens with your documents, double click the document to save to YF.
- 6) Click Upload button to send the document to the grey staging area.
- 7) If the document is ready as is, then check box beside document in grey area and click Save button to complete saving to YF.  
*\*To split or merge see options below.*

## Scan

- 1) Attach a scanner directly to your computer.
- 2) Log onto YellowFolder.
- 3) Click File Upload button.
- 4) Click Scan & Upload button.
- 5) Ensure scanner name is listed in Scan drop down list.
- 6) Place document(s) on the scanner attached to your computer.
- 7) Click Scan button on screen and scanner will begin scanning documents.
- 8) If the document is ready as is, then check box beside document in grey area and click Save button to complete saving to YF.  
*\*To split or merge see options below.*

## Upload and Scan Options

*If the document requires splitting or merging continue with the following additional steps.*

### 8) Option 1 – Splitting Documents

- A) To split the document, check box beside document in grey area and click left arrow to move document into viewer area.
- B) Check the boxes under the thumbnail pictures to choose pages to split out of the original document, then click right arrow to send back to grey staging area as a new document.
- C) Check box beside document in grey area and click Save button to complete saving to YF.

### 8) Option 2 – Merging Documents

- A) To merge documents, must have uploaded at least two documents from your computer.
- B) Check boxes beside all documents to be merged in grey area, then click left arrow to move documents into viewer area.
- C) Click page to merge with another document and drag it to that document and drop where that page needs to be, then check the boxes under the thumbnail of pages that will be part of that document.
- D) Click the right arrow to send the document to grey staging area as a new document.

## Dashboard

**Information Required:** When a user has uploaded documents from virtual printer or upload and has more than one record series, information required will ask for which record series.

**Verification Required:** When the system is unable to associate the document with a person from the CSV and needs information, such as name and ID.

**In Process/Complete:** Indicates the status of the document.

## Additional Support

**Phone:** (844) YELLOW-4 or (844) 935-5694

**Email:** support@yellowfolder.com