



**Washtenaw ISD**  
A REGIONAL EDUCATIONAL SERVICE AGENCY

WISD

CEO Image — Training Manual

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# CEO

## *About*

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CEO is a comprehensive form of digital record keeping associated with a business or school. It is meant to be utilized for scanning and filing important documents such as student records, employee documents, and files associated with any individual. CEO provides a “cabinet full of files” experience allowing you to search for a particular document description or individual. This manual will assist in understanding all the aspects of CEO as well as how to scan, file and search for document or individuals’ folders.

Please contact either your technology department or CEO Image (<http://ceoimage.com/support-center/email-support/>) for further training and assistance.

# Dashboard

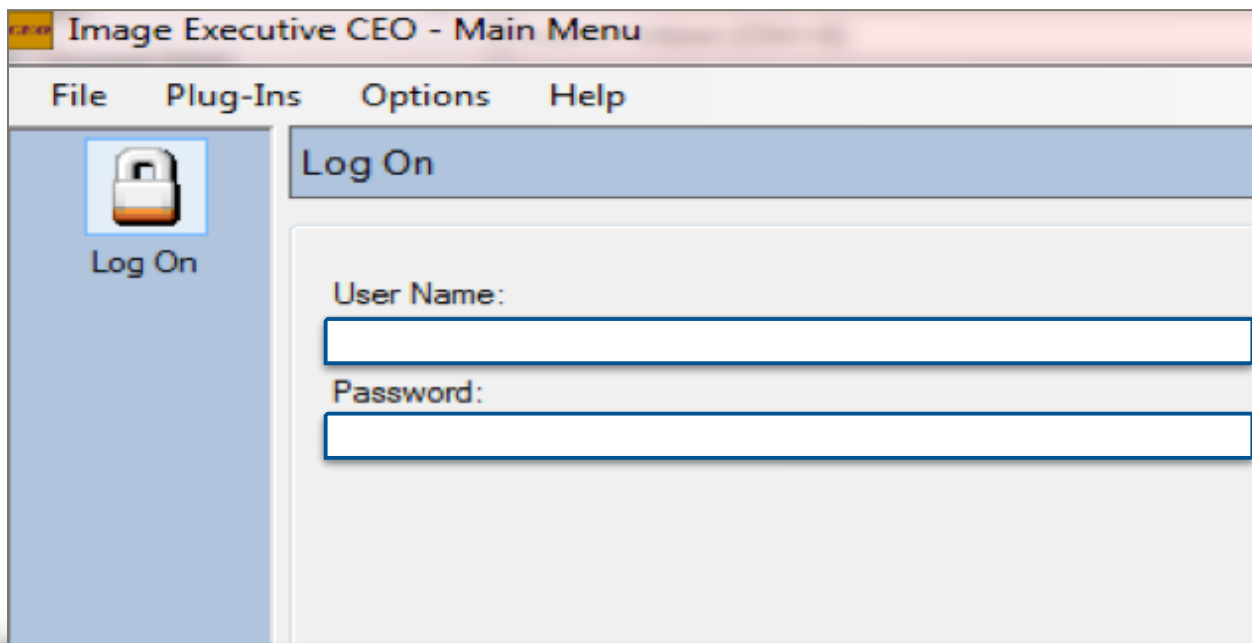
## *Login*



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## After Installation

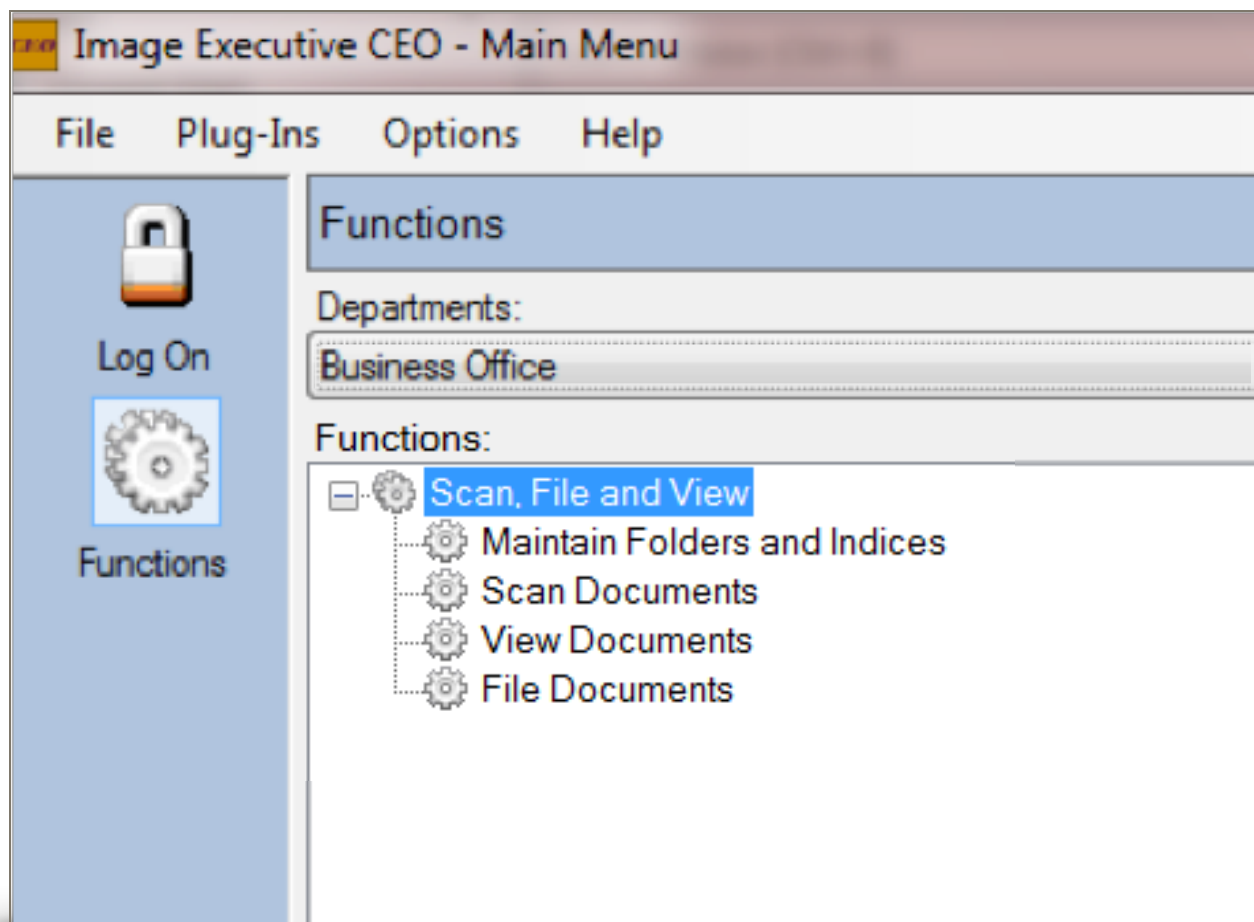
Access application via double clicking Icon either on Desktop or Toolbar



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## Enter User Name and Password

Provided for by administration or technology support staff



## *Functions*

## **Departments**

Only departments allocated to user will be visible

## **Functions**

### **Maintain Folders and Indices**

Add folders and document templates

### **Scan Documents**

Scanning functions only

### **View Documents**

Search, Export and Edit Folders

### **File Documents**

Sets Document Descriptions and Folder to Scanned Documents

# Quick Start Guide

## *How to Scan*

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### **Go to Scan Documents**

#### *Step One*

##### **Document Separation**

Divide documents with page of a barcode into corresponding descriptions

[Refer to last page for a Barcode Page](#)

[Refer to end of manual for Document Descriptions](#)

Barcode separates documents into individual queues

[Refer to pg 16 to separate Batches](#)

#### *Example*

Birth Certificate [[Barcode Page](#)] Immunizations [[Barcode Page](#)] Health Records

#### *Step Two*

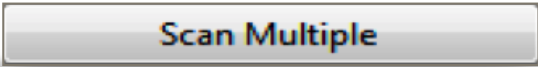
##### **Place Documents in Scanner**

Facing Away and Upside Down

#### *Step Three*

##### **Scan Multiple**

Scan All Documents

A rectangular button with a light gray gradient and a thin black border. The text "Scan Multiple" is centered on the button in a dark blue font.

#### *Step Four*

##### **Delete Barcodes and Edit Documents**

[Refer to pg 24 for deleting, adding, and moving documents](#)

#### *Step Five*

##### **Exit**

Saves upon Exit to File Document Window

[If does not appear in File Document Window, refer to pg 16 to verify settings especially "Commit to Queue on Exit"](#)

## How to File

### Go to File Document Window

#### Step One

##### Folder Search

Insert Individual Name in *Folder Name*

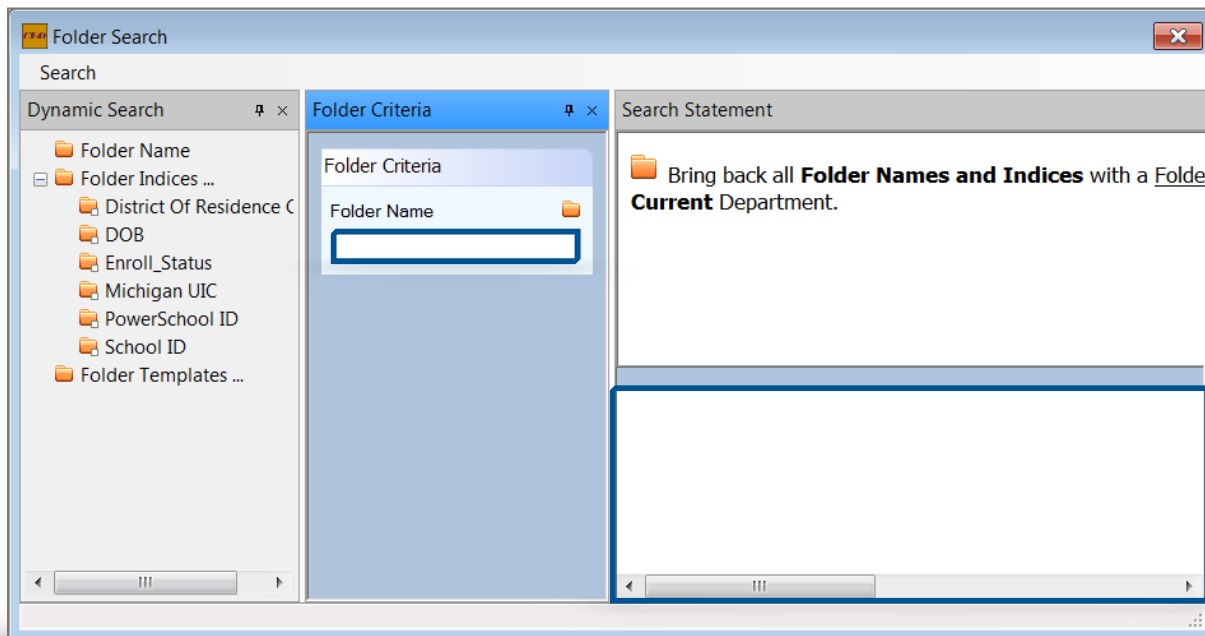
Press *Enter*

Individual will display in *Search Statement*

Double Click Desired Individual

Individual selected should correlate to individual displayed

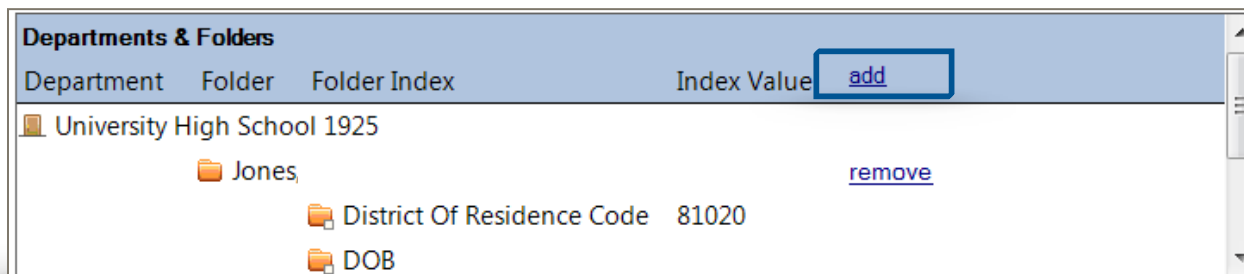
If individual does not appear refer to pg 13 create folder or submit ticket to your technology department



#### If Folder Search does not automatically display:

Select "Add" in *Departments & Folders*

Refer to pg 30 for search options



## Step Two

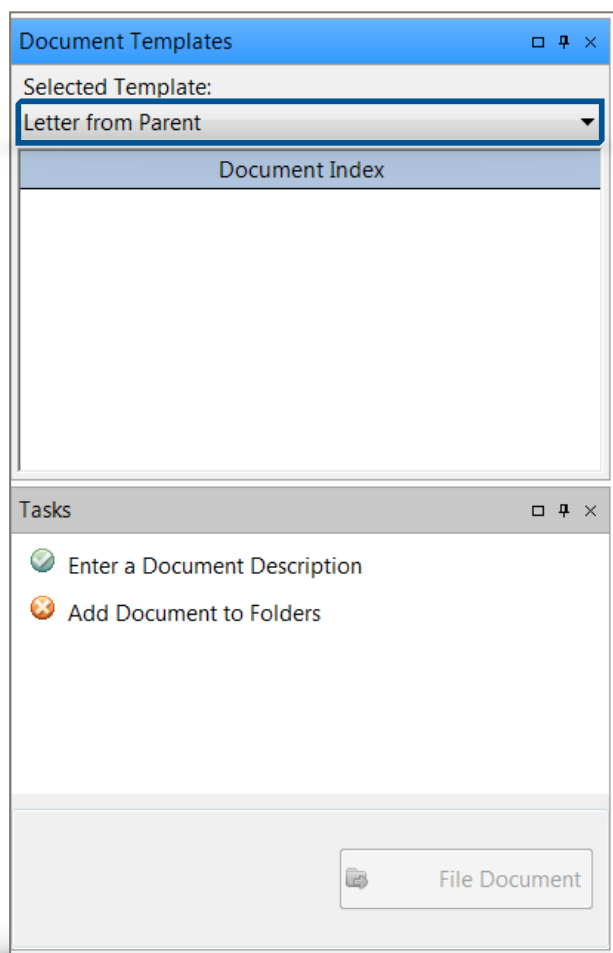
### Select Document Description via Selected Template

Select the Description of Document

Template selected will appear in *Document Description*

If does not appear refer to pg 29

**Please refer to end of manual for a list of Document Descriptions**



Document Data	
<b>Document Description</b>	
Letter from Parent	
<b>Dates</b>	
Document Date	11/7/2014 <a href="#">edit</a>
Scan Date	11/7/2014
File Date	11/7/2014
Retention Start Date	<a href="#">edit</a>
Retention Period	
<b>Document Indices</b>	



## Step Three

### Dates

Modify *Document Date* to reflect date of document or present date

**Do not leave as default date, unless it is the document date**

Dates		
Document Date	11/7/2014	<a href="#">edit</a>
Scan Date	11/7/2014	
File Date	11/7/2014	
Retention Start Date		<a href="#">edit</a>
Retention Period		


## Step Four

### File Document

If have completed Steps 1-3 and edited or deleted (especially barcodes) documents.

Tasks

- Enter a Document Description
- Add Document to Folders

 File Document

# How to Search

## Go to View Documents Window

### Step One

#### Search

Double Click *Folder Name*

Enter individual's name in *Folder Name*

Refer to pg 33-35 for more search options

The screenshot shows the 'View Documents - STEMM Academy 1923' application window. The interface includes a menu bar (File, Search, Results, Window, Help), a search bar with 'Full-Text Search' and a 'Search Statement' field. On the left, there is a 'Dynamic Search' sidebar with a tree view of search criteria including 'Document Description', 'Dates ...', 'Document Indices ...', 'Document Templates ...', 'Folder Name', 'Folder Indices ...', 'District Of Residenc...', 'DOB', 'Enroll\_Status', 'Michigan UIC', 'PowerSchool ID', 'School ID', and 'Folder Templates ...'. The 'Document Criteria' and 'Folder Criteria' panels are open, both showing 'Document Description' and 'Folder Name' fields. The main area displays a table of search results for the folder 'Brown,'.

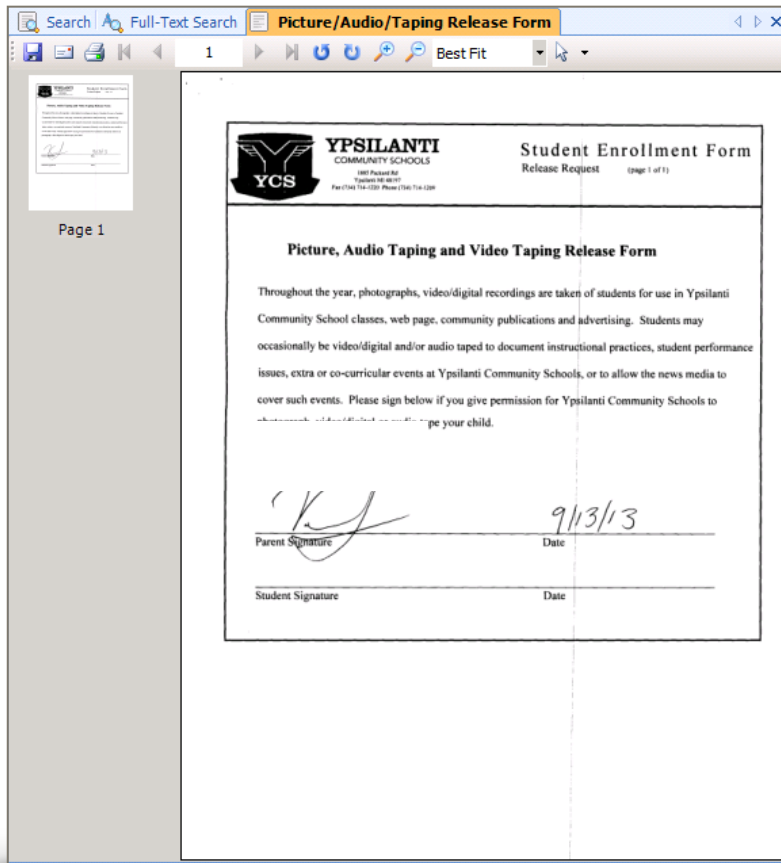
Folder Name	Document Description	Document Date	File Date	Scan Date
Brown,	Academic Achievement Concerns	2/17/2014	6/11/2014	6/11/2014
	AUP Form	2/4/2008	6/4/2014	5/29/2014
	AUP Form	8/23/2012	6/4/2014	5/29/2014
	Authorized Release/Exchange of Information	2/4/2008	6/4/2014	5/29/2014
	Birth Certificate		6/4/2014	5/29/2014
	Birth Certificate		6/4/2014	5/29/2014
	Enrollment Forms	4/13/2005	6/4/2014	5/29/2014
	Enrollment Forms	9/5/2006	6/4/2014	5/29/2014
	Enrollment Forms	2/4/2008	6/4/2014	5/29/2014
	Health Records	6/4/2014	6/4/2014	5/29/2014
	Immunization	1/14/2014	6/10/2014	6/10/2014
	Immunization	5/13/2014	6/10/2014	6/10/2014
	Immunization	6/4/2014	6/4/2014	5/29/2014
	Picture/Audio/Taping Release Form	9/20/2008	6/4/2014	5/29/2014
	Picture/Audio/Taping Release Form	8/23/2012	6/4/2014	5/29/2014
	Proof of Residency	6/4/2014	6/4/2014	5/29/2014
	Proof of Residency	6/4/2014	6/4/2014	5/29/2014
	Scholastic Data (Report Cards, Transcripts and Progress Report)	6/4/2014	6/4/2014	5/29/2014
	Scholastic Data (Report Cards, Transcripts and Progress Report)	6/4/2014	6/4/2014	5/29/2014
	Scholastic Data (Report Cards, Transcripts, and Progress Report)	6/24/2014	6/26/2014	6/24/2014
	SOC (School of Choice) Form	5/27/2010	6/4/2014	5/29/2014
	Test Records (MEAP, ACT, Explorer, SAT...)	6/4/2014	6/4/2014	5/29/2014
	Test Records (MEAP, ACT, Explorer, SAT...)	6/4/2014	6/4/2014	5/29/2014

### Step Two

#### Select Document

Double Click *Document Description*

# View both Document Data and File



If both do not appear refer to pg 32

For further editing of data and file refer to pg 36-37

Search Full-Text Search Picture/Audio/Taping Release Form

### View Document Data

**Document Description** [edit](#)  
Picture/Audio/Taping Release Form

Dates	
Document Date	9/13/2013 <a href="#">edit</a>
Scan Date	6/23/2014
File Date	7/10/2014
Retention Start Date	7/10/2014
Retention Period	

Departments & Folders			
Department	Folder	Folder Index	Index Value <a href="#">add</a>
Adams STEM Academy 2825			
	Jones,		<a href="#">remove</a>
	District Of Residence Code		
	DOB		
	Enroll_Status		
	Michigan UIC		
	PowerSchool ID		
	School ID		

Document Indices		
Document Index	Index Value	Page

**Notes** [add](#)

## How to Export Documents

### Go to View Documents

#### Step One

##### **Only Search One Individual**

Otherwise, all individuals in results will be exported

For search options refer to pg 9 and/or 33-35

Folder Name	Document Description
Brown,	Academic Achievement Concerns
	AUP Form
	Export Documents Report
	Authorized Release/Exchange of Information
	Birth Certificate
	Birth Certificate
	Enrollment Forms

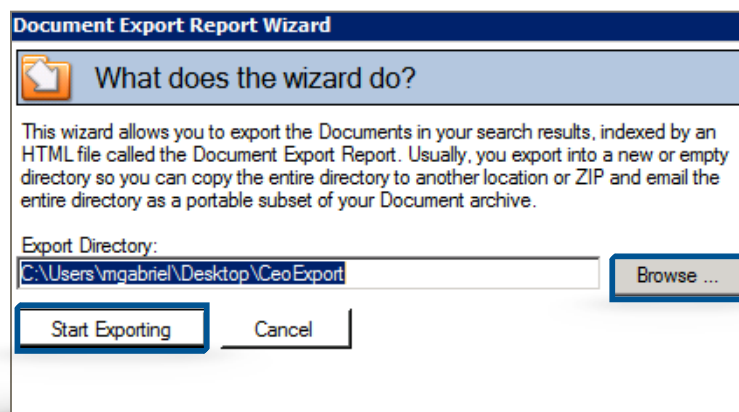
### Search Statement

#### Step Two

##### **Folder Name**

Right-click on the blue bar directly where it describes the columns (*Folder Name, Document Description, etc*)

*"Export Documents Report"*



### Export Documents Report Wizard

#### Step Three

##### **Browse ...**

Select or Add Folder

##### **Start Exporting**

Automatically *"Start Export"*, unless exported previously then *"Add existing report and rename new files to avoid name conflicts"*



# Documents Exported

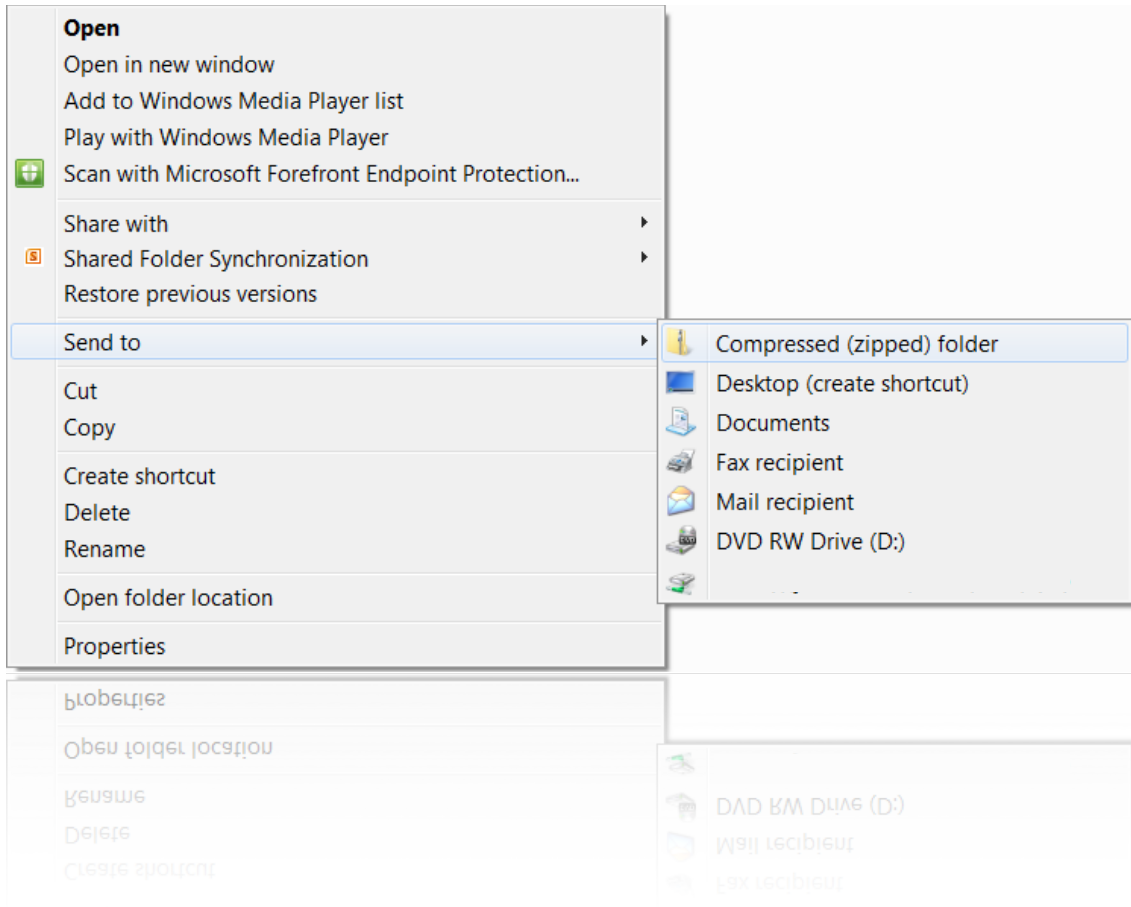
## Step Four

### Browser Window

Opens for Confirmed Export  
Close browser

### Folder: Selected For File Export

Right Click Folder of Individual Exported  
Send to: "Zipped (compressed) Folder"



# Maintain Folders and Indices

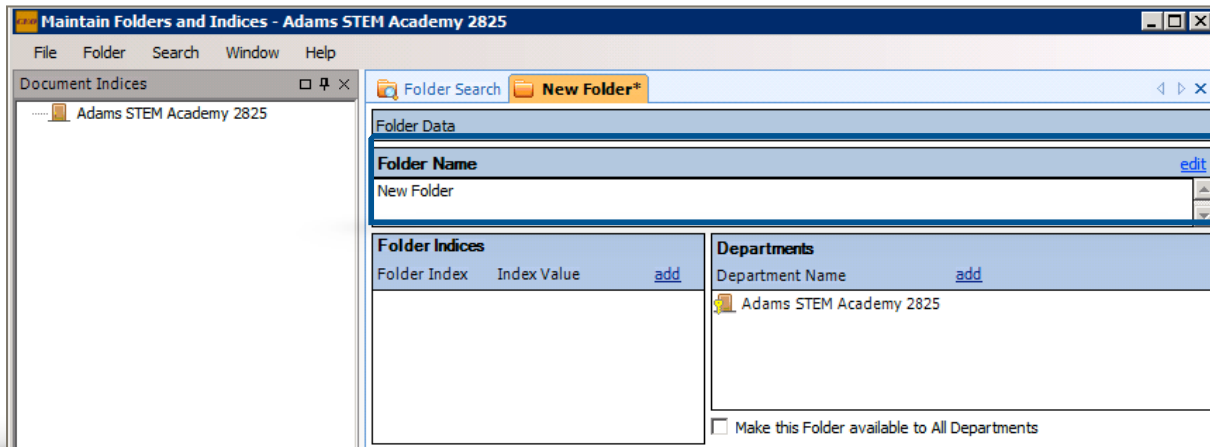
## Folder

### Add Folder: Ctrl+F

#### Folder Name

*“Edit”*

Enter student’s name: *Last, First*

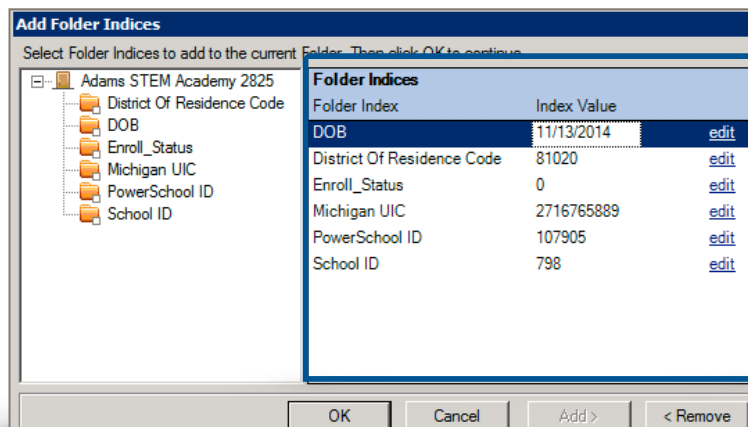


#### Folder Indices

*“Add”* the *Folder Indices* dialog box will appear

Double click on *DOB, District of Residence Code, Enroll Status, etc.*

Click *“OK”*



#### Departments

Department is already associated to Folder, no editing necessary

#### Save Updates

Ctrl+U

# Document Template

## Add Template

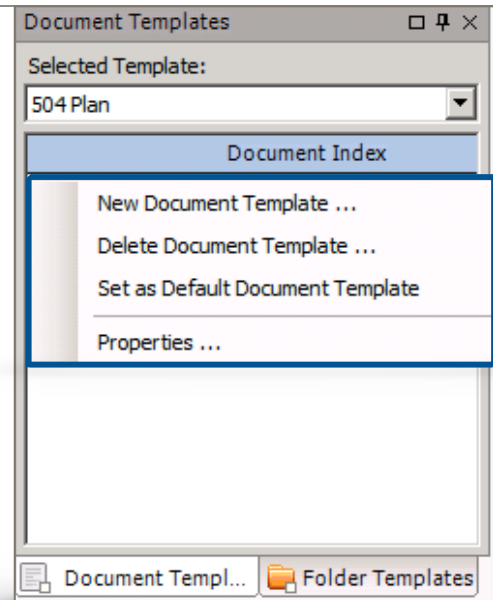
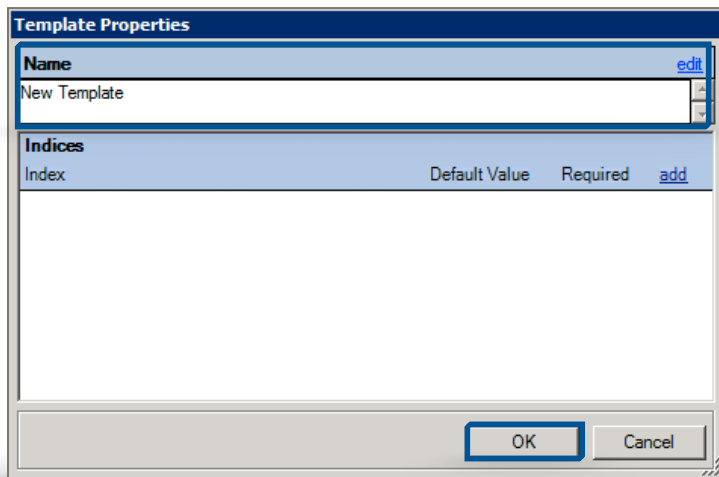
Right Click Document Index area

### New Document Template...

Template Properties Dialog Box Appears

Name, type a uniform description for the document.

Click "OK"



## Delete Document Template

Selete Delete Document Template...

## Modify Document Template

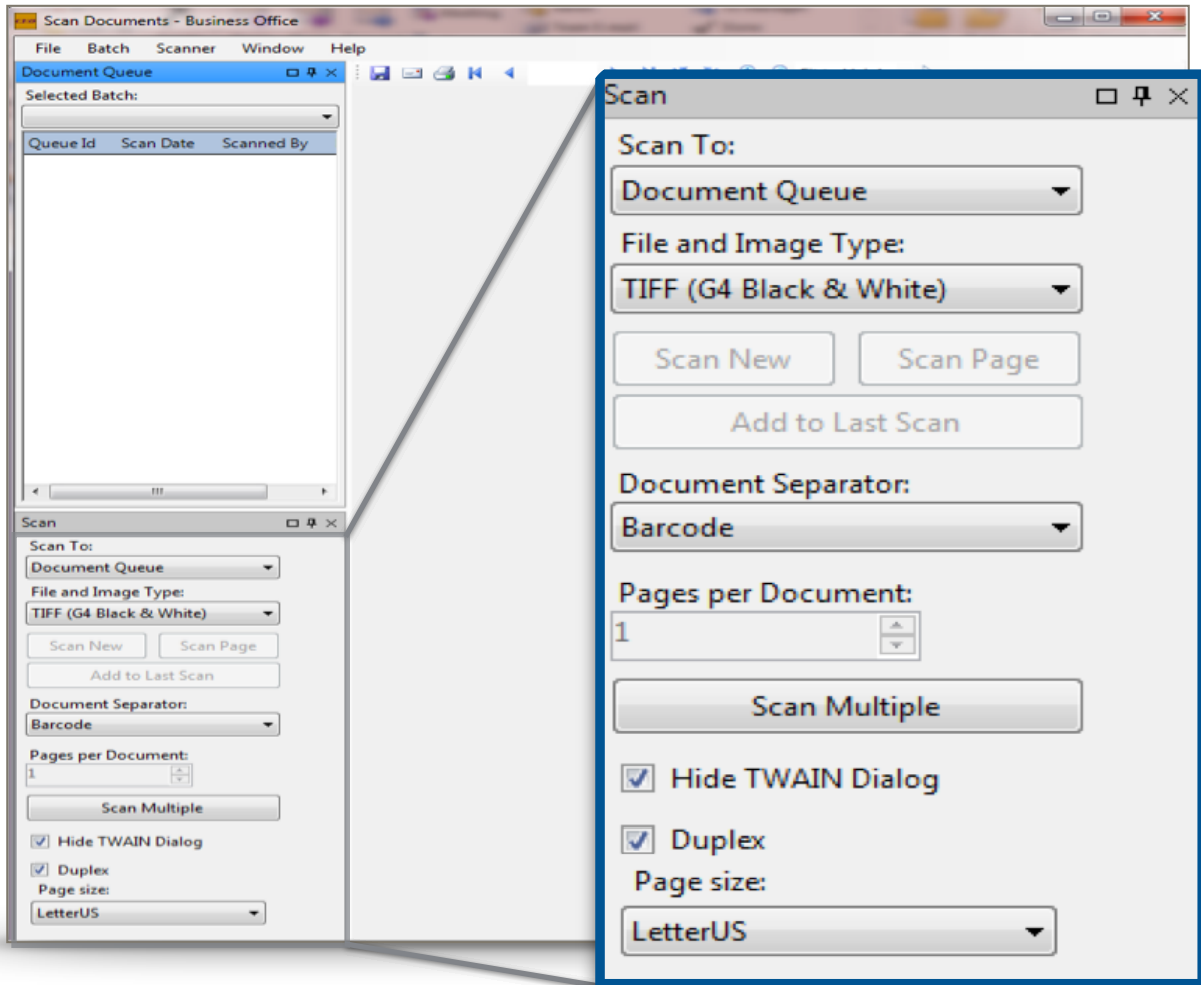
### Properties...

Template Properties dialog box appears

"Edit"

Change name to appropriate template

# Scan Documents



## Scan Window

## Scan Settings

### Scan To:

*Document Queue*

### File and Image Type:

*TIFF (G4 Black & White)*

### Document Separator:

*Barcode*

Separates documents from one another if placed in between prior to scan

### Hide TWAIN Dialog & Duplex

Checkmark

### Page size:

*LegalUS*



## Toolbar

### File

#### Open...

n/a

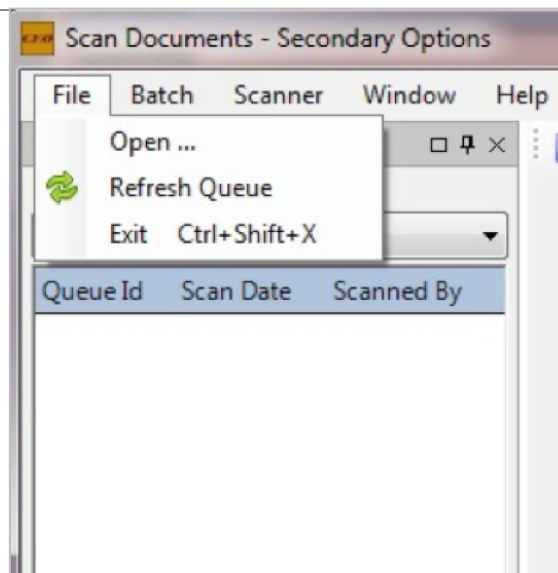
#### Refresh Queue

Scanned Documents do not display or paper jam occurs

#### Exit

Ctrl+Shift+X

Saves upon Exit to File Window



### Batch

#### New Batch

Ctrl+B

For separating multiple individuals

#### Rename Batch

Ctrl+R

*Last, First of Individual*

#### Delete Batch

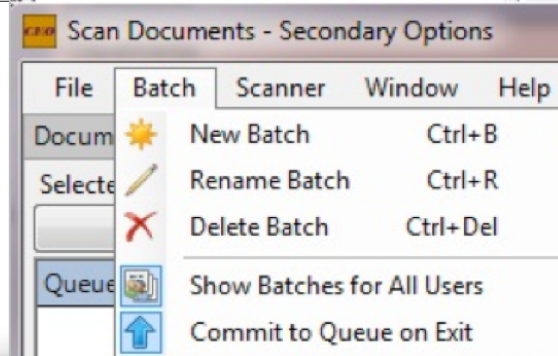
Ctrl+Del

*Are you sure?*

If yes click "OK"; Once deleted, deleted forever

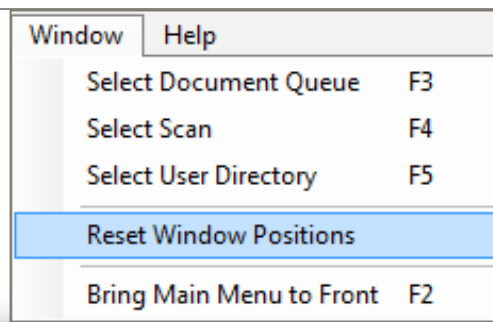
#### Commit to Queue on Exit

Must be Selected for Scanned Documents to save upon Exit

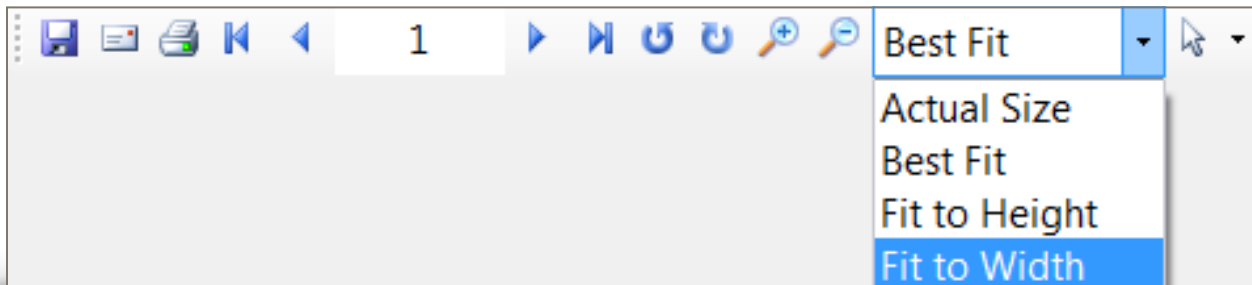


### Window

#### Reset Window Positions



## Secondary Functions Toolbar



### **Save**

Document saved as *.tiff* to folder

### **Email**

n/a

### **Print**

Print queue to corresponding printer

### **Rotate Left/Right**

Rotate Document

### **Zoom In/Out**

### **Fit to..**

*Actual Size*

*Best Fit*

*Fit to Height*

*Fit to Width*

### **Tools**

Curser selection

*Pan*

*Select*

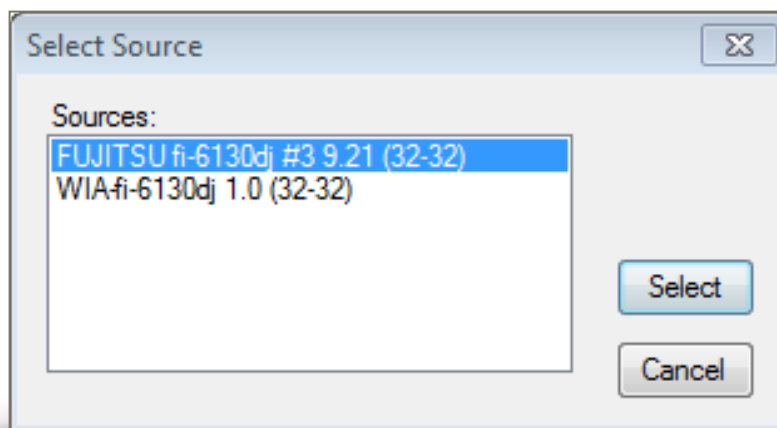
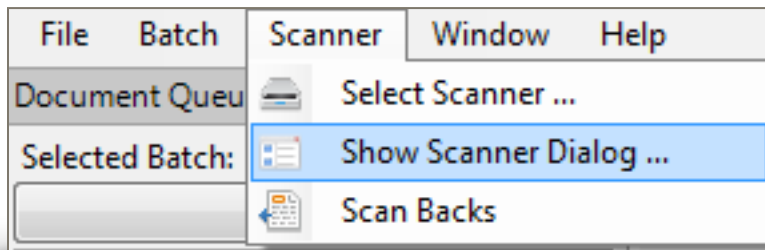
*Zoom*

## Scanner

### Select Scanner ...

#### **FUJITSU Scanner Series**

Make sure scanner is powered On  
Driver must be installed



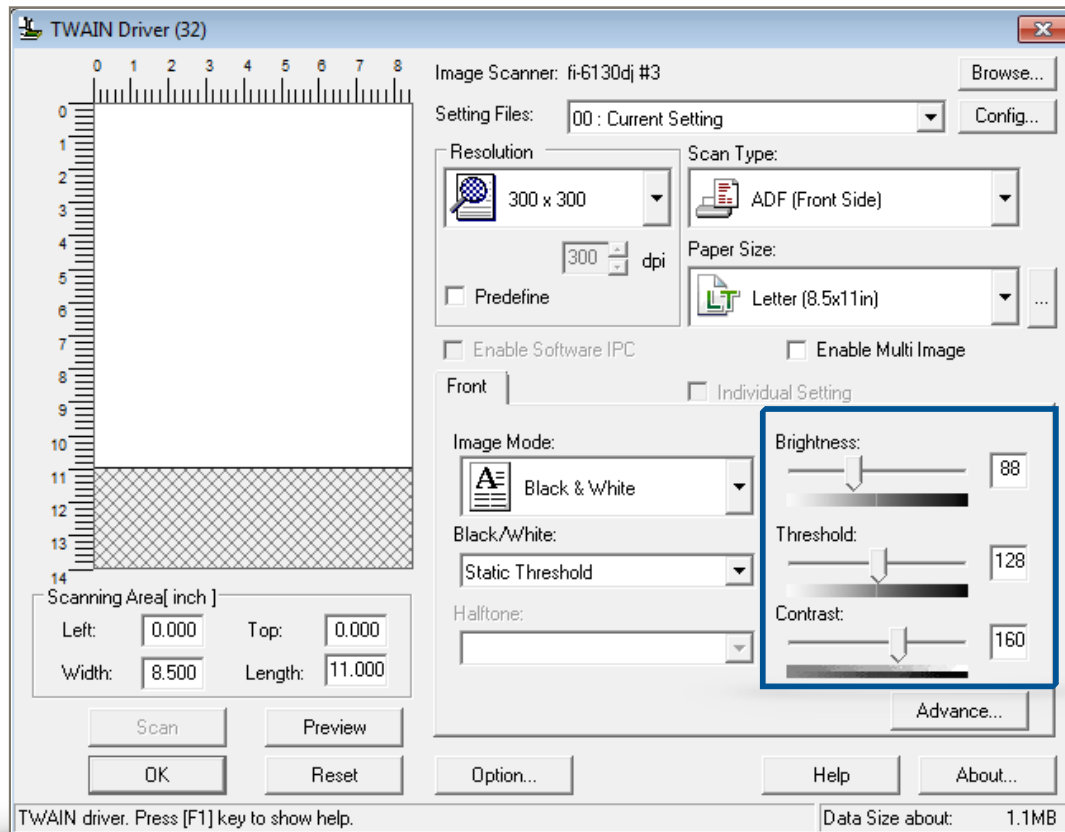
Following link to download driver:

<http://www.fujitsu.com/global/support/computing/peripheral/scanners/drivers/>

# Show Scanner Dialog ...

## Brightness, Threshold, and Contrast

Change for best quality of Scanned Documents



# Advance...

Set Following for Best Quality of Scanned Documents

## Gamma Pattern

*Sharp*

## Dropout Color

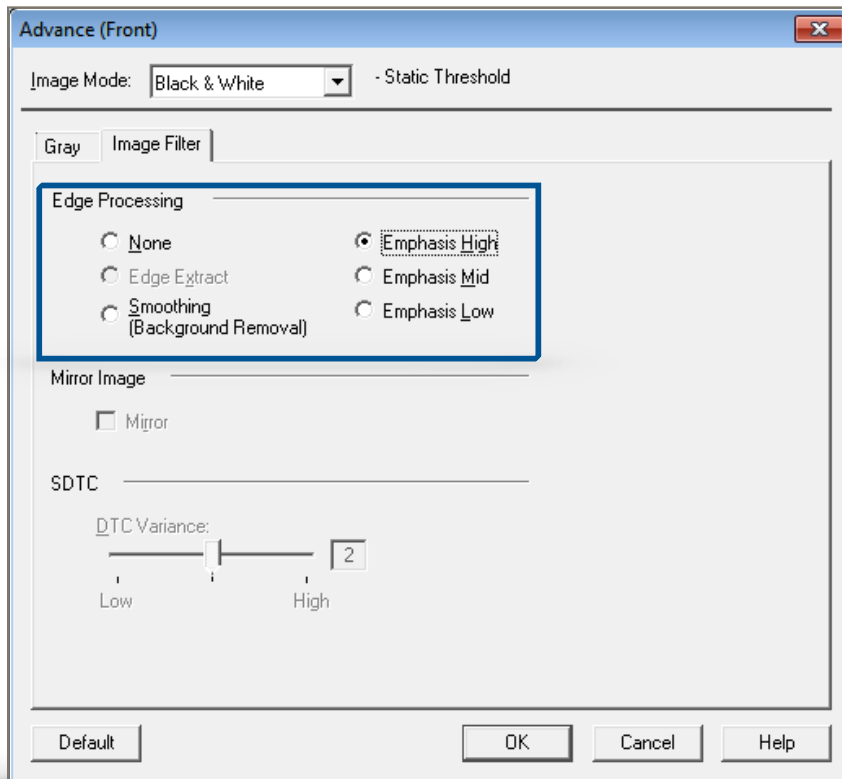
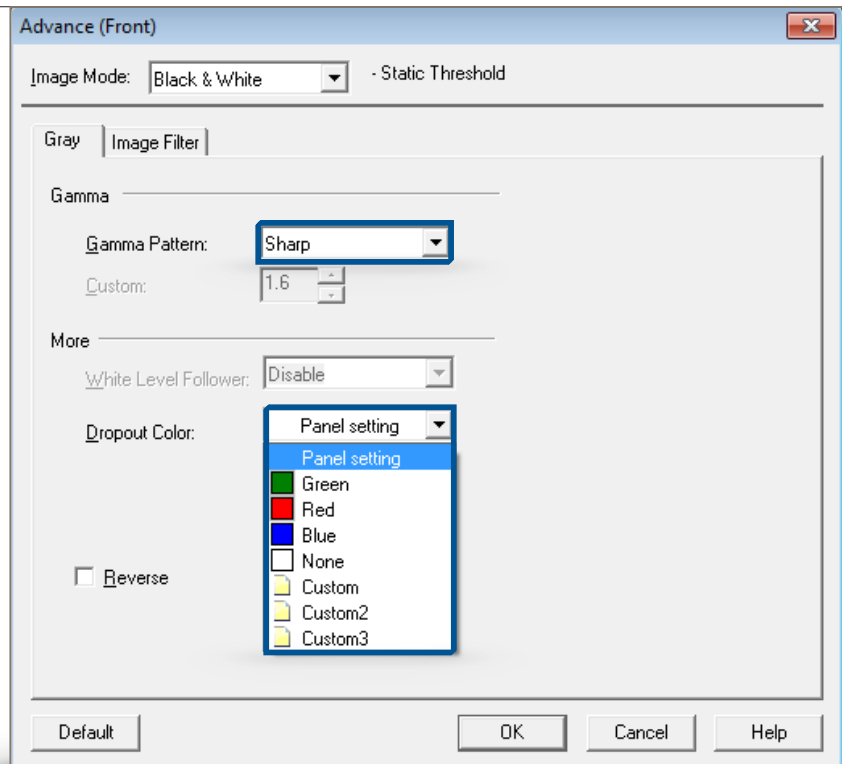
Removes Selected Color

## Edge Processing

*Emphasis High*

## Default

Restores original settings



## Set-up

### Blank Page Tolerance

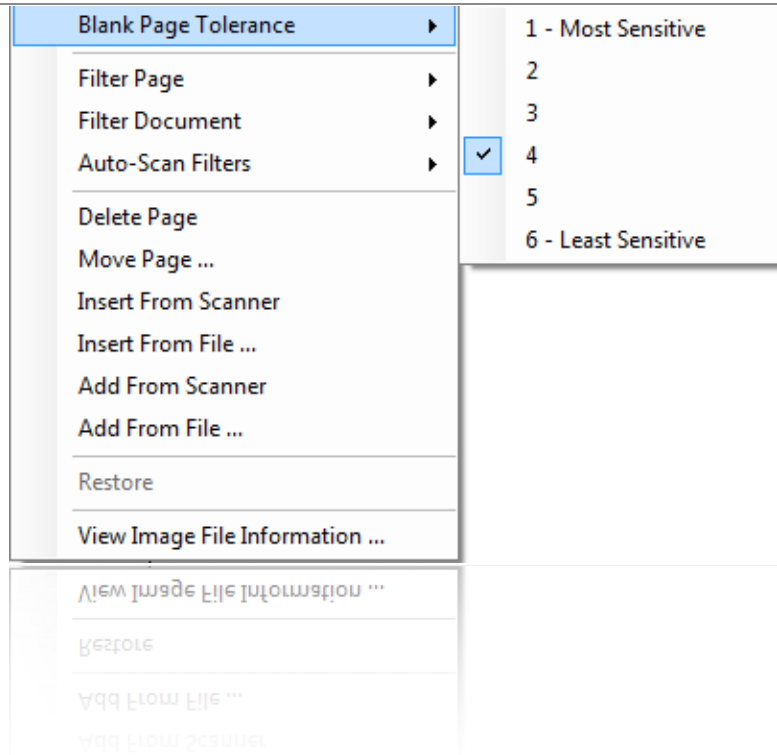
**Filter for All Future Documents**

#### Most Sensitive

Detects lighter marks  
Pages within entire  
range of contrast will  
scan

#### Least Sensitive

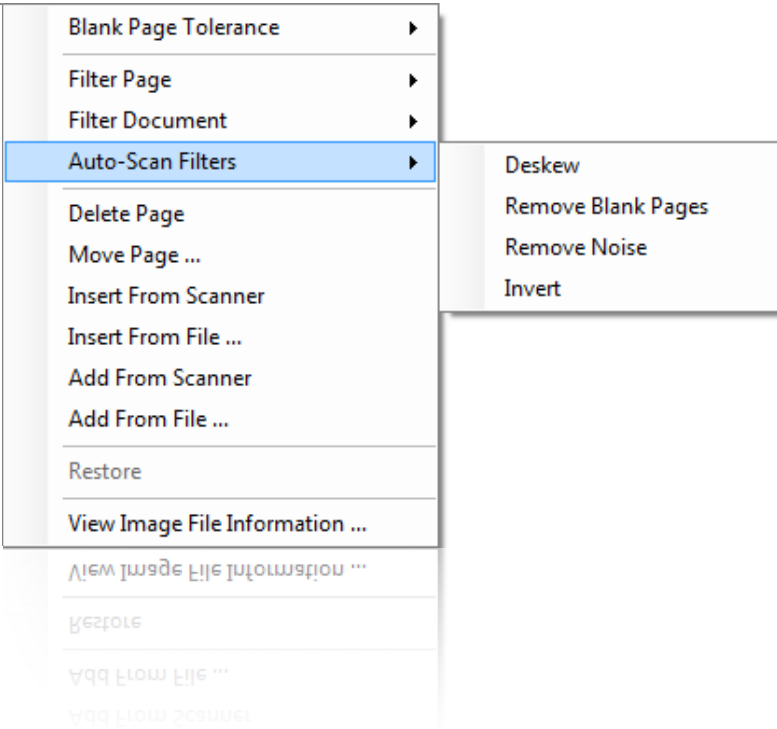
Detects darker marks  
Only pages within range  
of contrast will scan



### Auto-Scan Filters

#### All Documents

*Deskew*  
*Erase Region*  
*Remove Blank Pages*  
*Remove Noise*  
*Invert*



# Window Components

## Selected Batch

Appears as username - date and time  
Rename batch to individual (*Last, First*)  
[Refer to pg 16](#)

## Queue Id

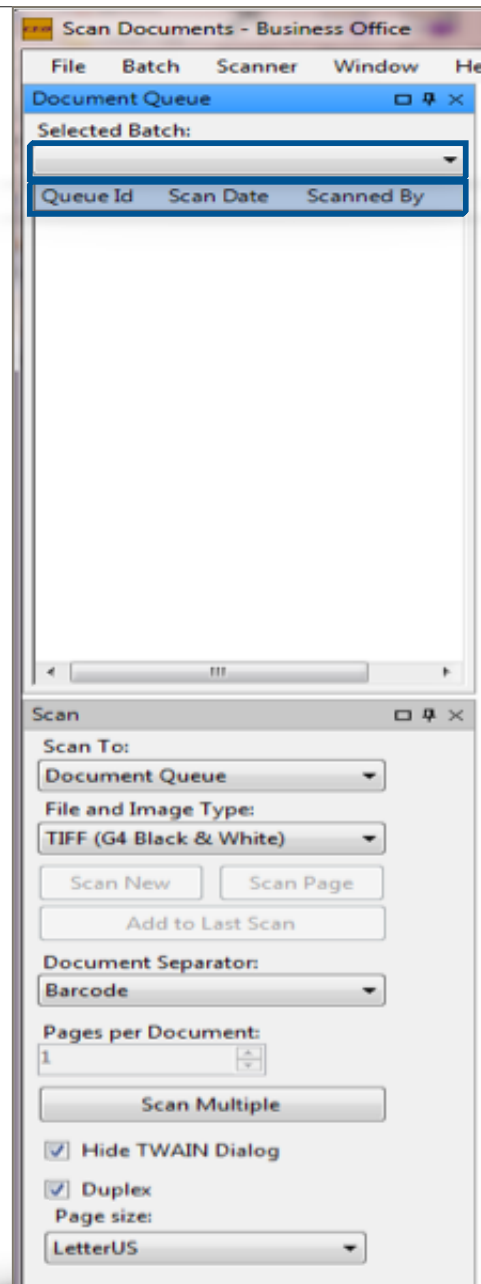
Number of the Document(s) Scanned

## Scan Date

Date Document Scan

## Scanned By

Scanning by User



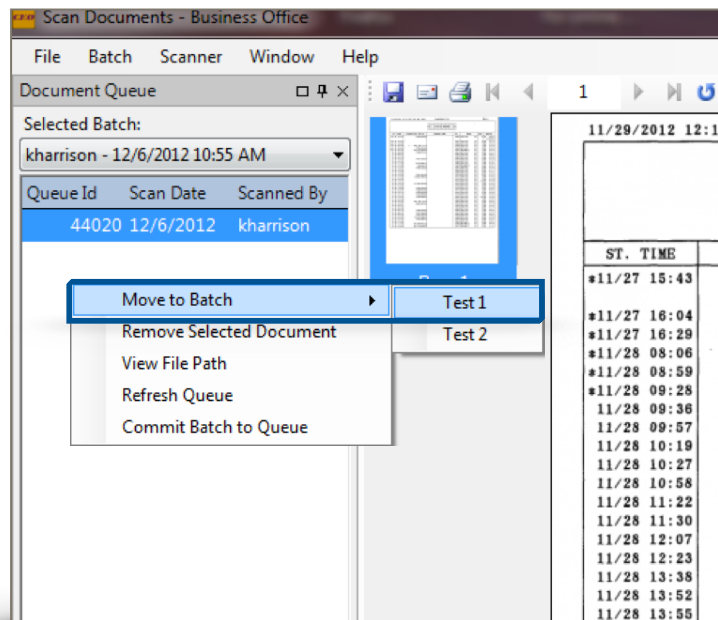
## *Edit: Queue within Batch*

# Batch Context Window

**Right Click Queue Batch Window**

### Move to Batch

Selected queue to move to other batch

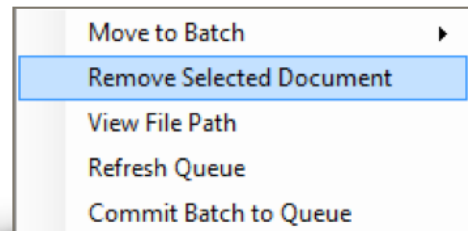


### Remove Selected Document

Highlighted queue will be deleted indefinitely

*Are you sure?*

If yes, click *Remove Selected Document*



### Commit to Queue on Exit

Select for Scanned Documents to save upon Exit

Commit Batch to Queue



# Edit: Documents within Queue

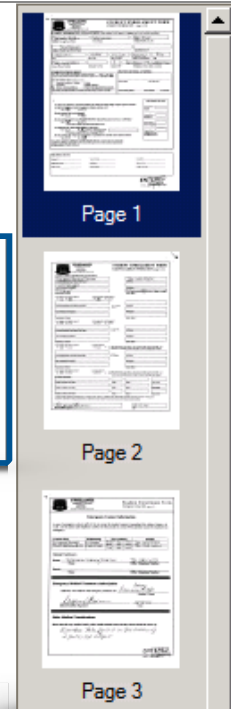
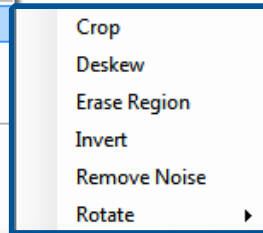
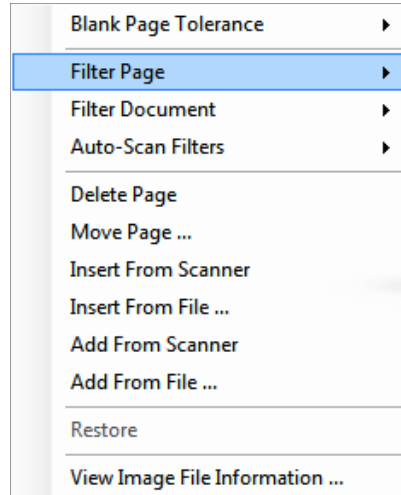
## Queue Thumbnail Context Window

### Right Click Thumbnail Window

#### **Filter Page**

Page Highlighted within Queue

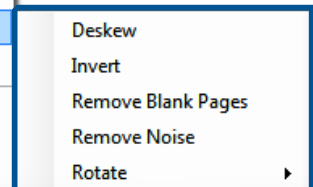
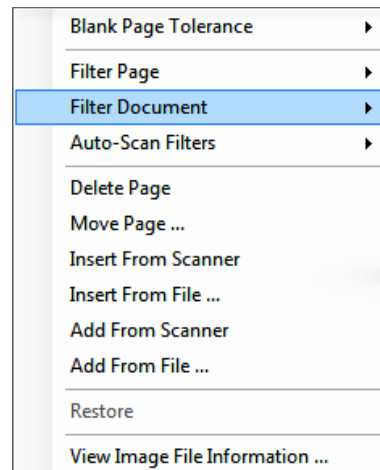
- Crop*
- Deskew*
- Erase Region*
- Invert*
- Remove Noise*
- Rotate*



#### **Filter Document**

Queue Highlighted within Batch

- Deskew*
- Invert*
- Remove Blank Pages*
- Remove Noise*
- Rotate*



# Queue Thumbnail Context Window

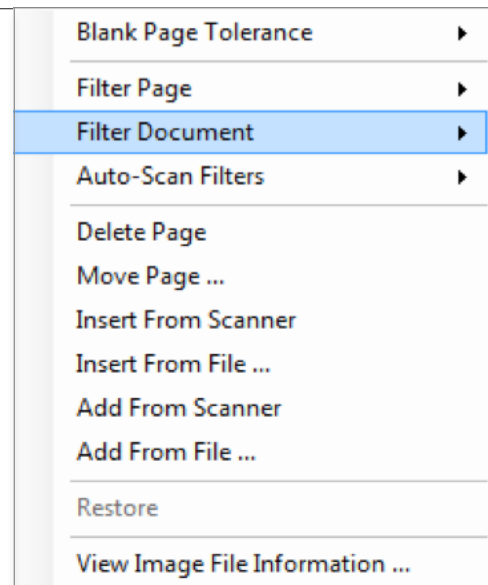
## Right Click Thumbnail Window

### Delete Page:

Remove highlighted page  
*Are you sure?*

### Move Page:

Select page to move within queue



### Insert From Scanner:

Scan in additional documents, insert before highlighted document

### Insert From File:

Add in additional documents, insert before highlighted document

### Add From Scanner:

Scan in additional documents, add after highlighted document

### Add From File:

Add in additional documents, add after highlighted document

**Insert/Add from File the Document being added Must be in .tiff Format**

### Restore:

Any document last deleted will be reestablished to queue

# File Documents

## Toolbar

### File

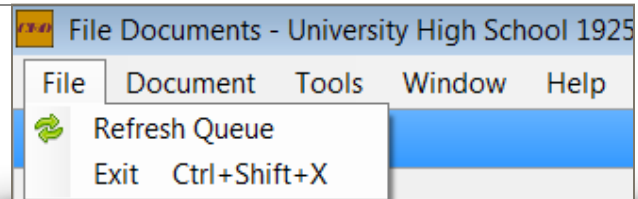
#### Refresh Queue

Reload Queue

#### Exit

Ctrl+Shift+X

Leave Window



### Document

#### Edit Description

Ctrl+D

Name to corresponding template

If no template refer to pg 13

#### Edit Document Date

Ctrl+A

Should be date that is apparent on documents

#### Select Notes

Ctrl+N

Only for necessary comments regarding document

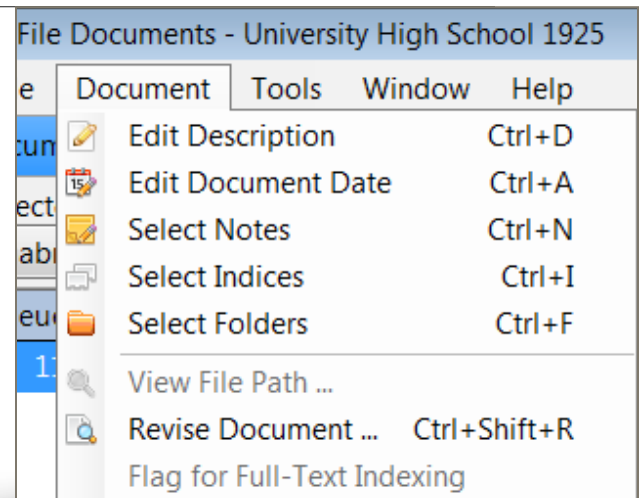
#### Select Indices

n/a

#### Select Folders

Ctrl+F

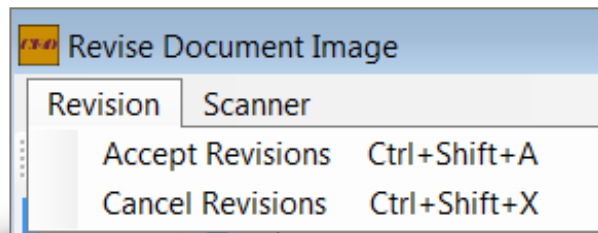
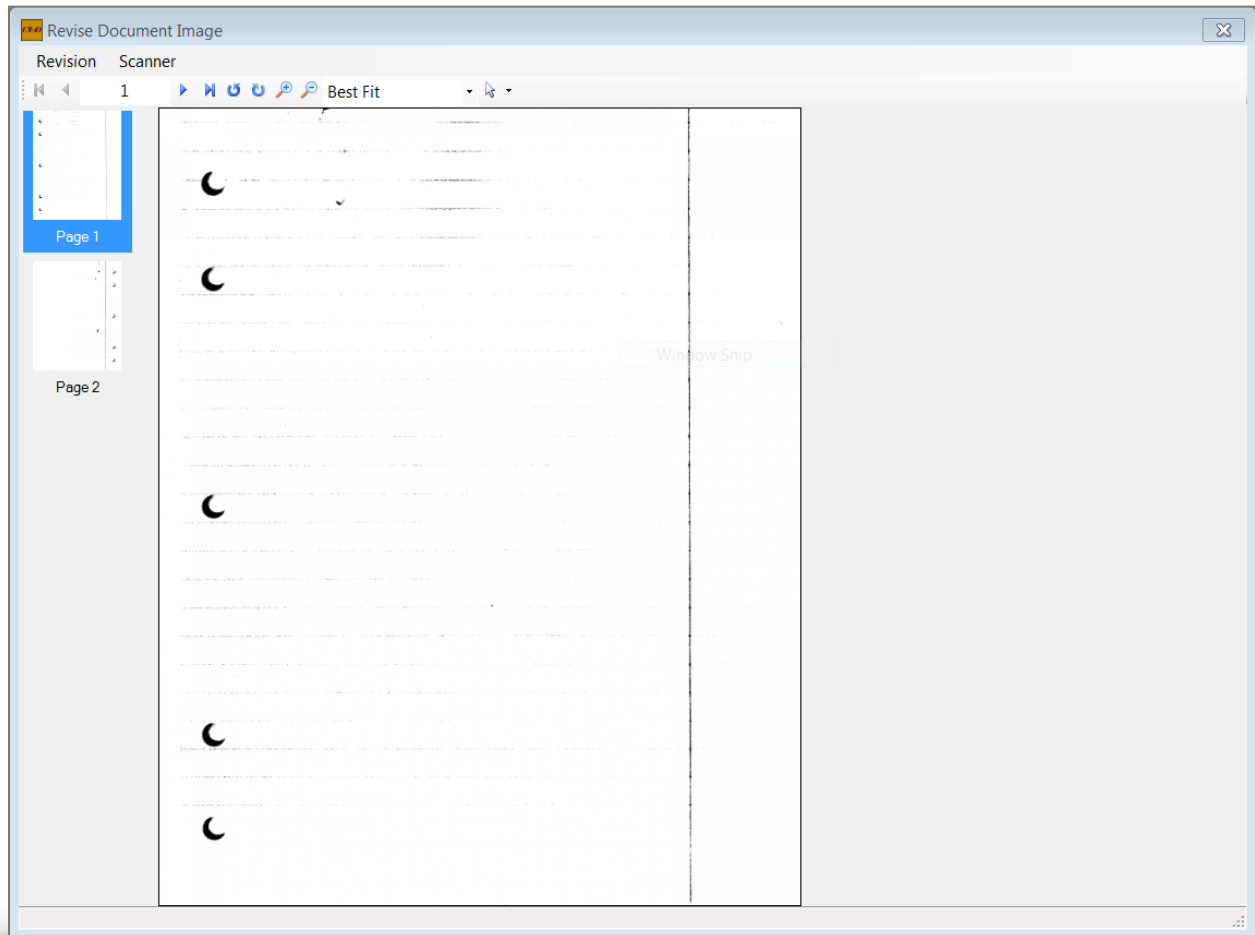
Change individual associated with document



## Revise Document ...

Ctrl+Shift+R

Secondary window will pop-up  
Editing opinions refer to pg 24



# Secondary Functions Toolbar

Refer to pg 17

## Tools

### File Document

Ctrl+Shift+F

Saves Document to Folder and Template

### Add to Folder

Ctrl+Shift+L

Add to Individual

### Add to Index

n/a

### Add Note

Ctrl+N

Only for necessary comments regarding document

### Removed Selected Folder

Ctrl+Del

Remove Individual

### Edit on Enter

Always Checkmark

### Delete Selected Documents(s)

Ctrl+Shift+Del

Removes Documents Highlighted

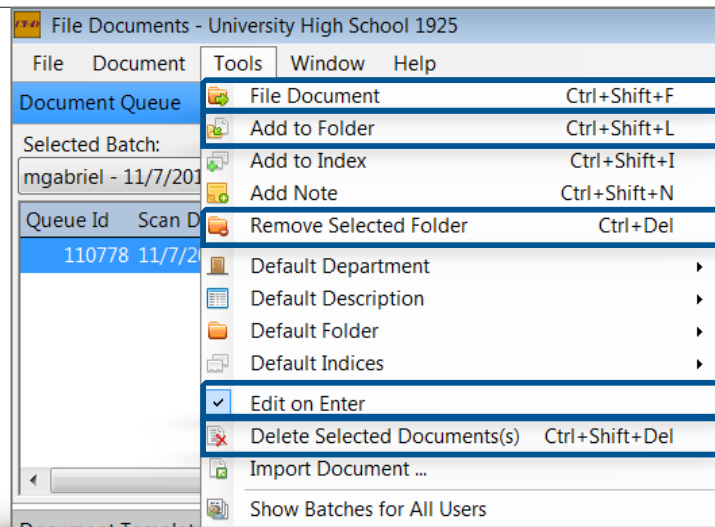
*Are you sure?*

### Import Documents ...

n/a

### Show Batches for All Users

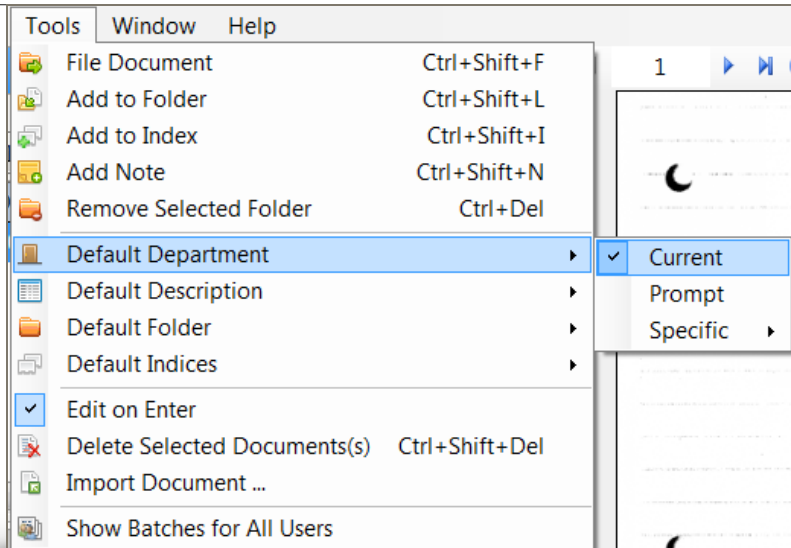
Displays Scanned Documents from other Users in Allocated Department



# Tools

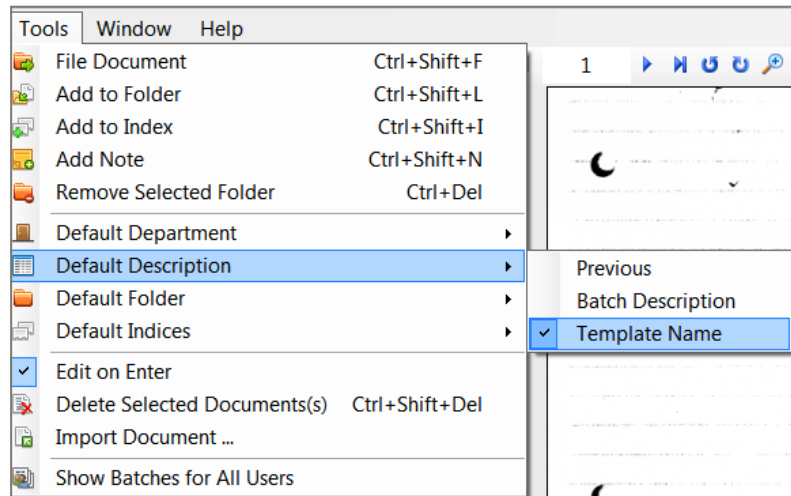
## Default Department

*Current*



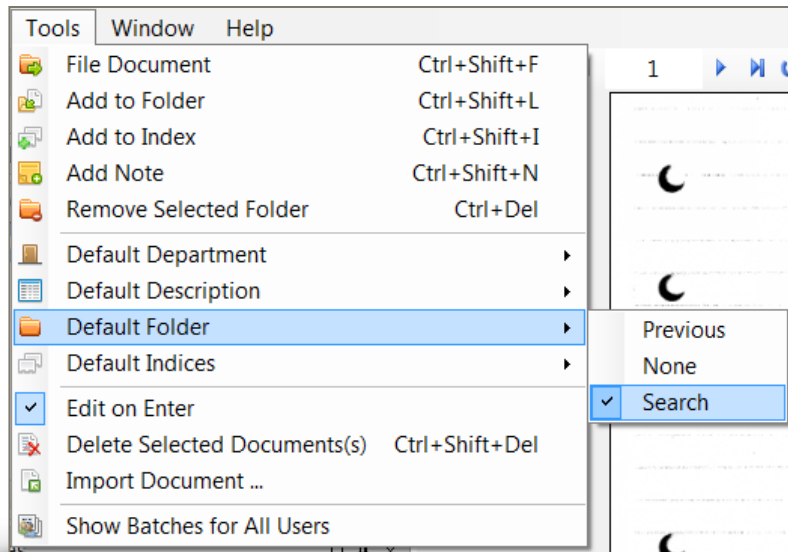
## Default Description

*Template Name*



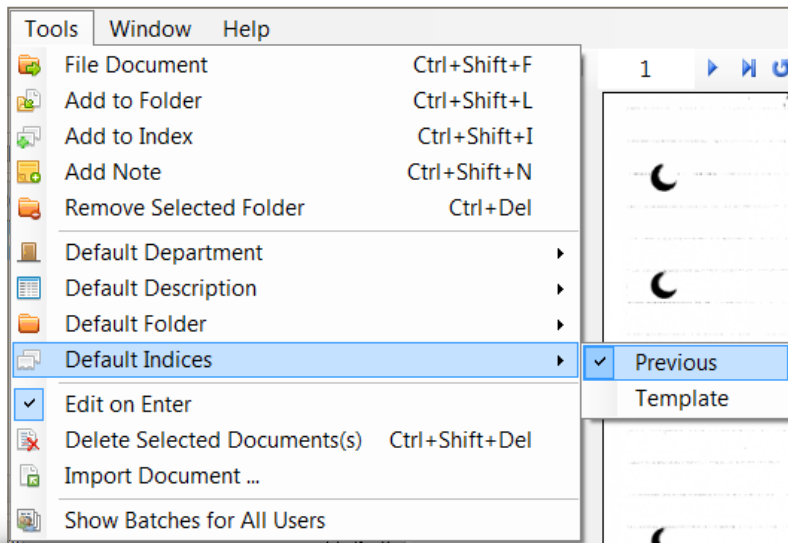
## Default Folder

*Search*



## Default Indices

*Previous*



---

## Window

### Reset Window Positions

Reset Window Positions

# Filing Window

## Filing Window Components

### Selected Batch

Name of Individual

*Refer to pg 16*

### Queue Id

Number of Document(s) Scanned

### Scan Date

Date Document Scan

### Scanned By

Scanning by User

### Selected Templates

Document Description

### Tasks

Enter a *Document Description*

*"Add" Document to Folders*

*File Documents*

### Document Data

Document Description

Dates

*Document Date*

*Scan Date*

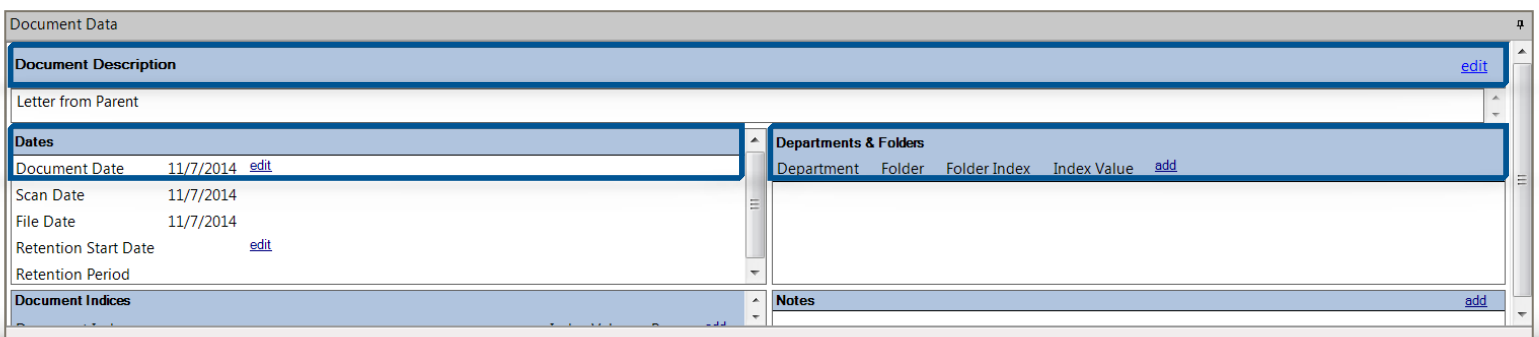
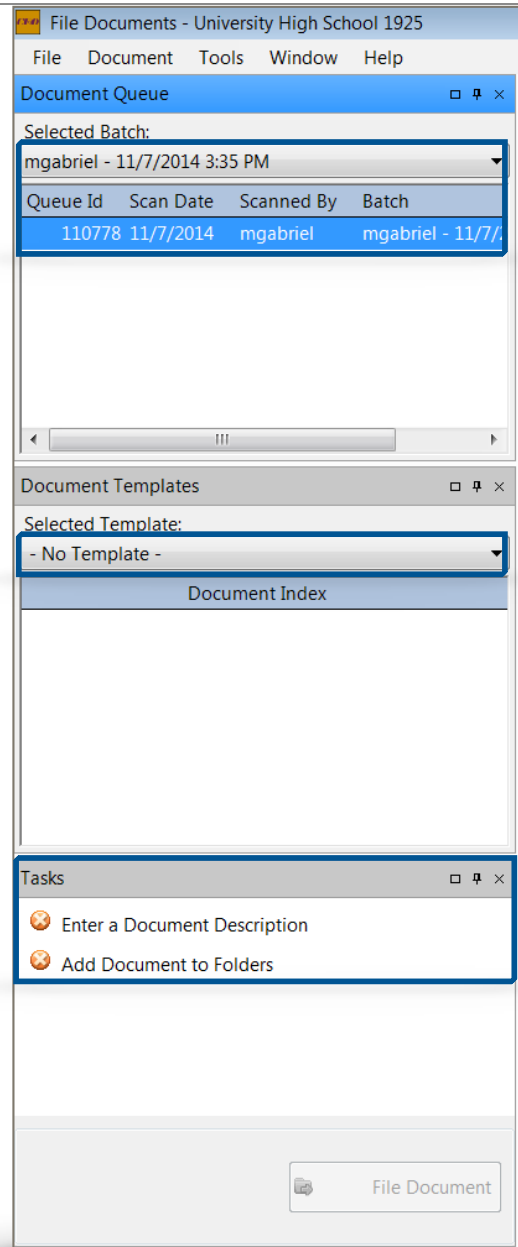
*File Date*

*Retention Start Date*

Document Indices

Departments & Folders

Notes





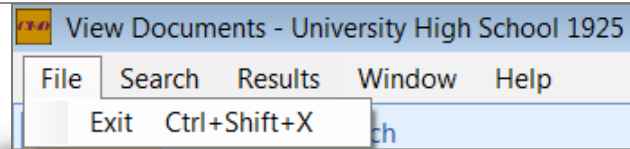
# View Documents

## Toolbar

### File

#### Exit

Ctrl+Shift+X

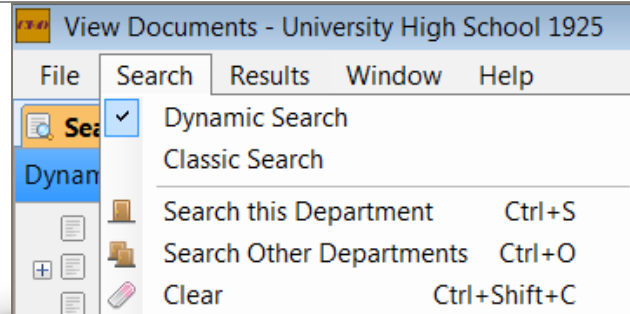


### Search

#### Dynamic Search

Search using custom combination of criteria.

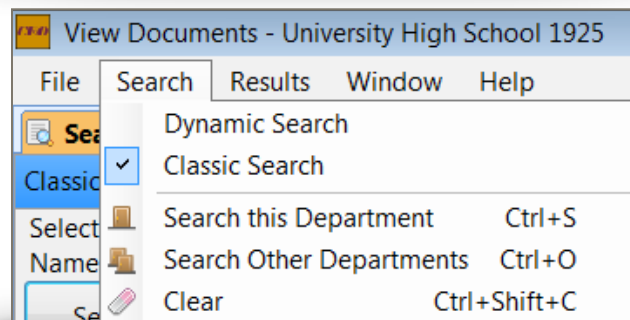
[Refer to pg 33](#)



#### Classic Search

Search by predetermined combinations.

[Refer to pg 34](#)



### Results

#### Alternate Row Colors

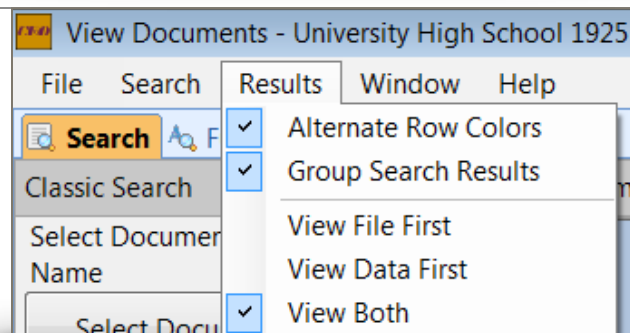
Search results will alternate in color for each line

#### Group Search Results

Bunches with documents associated with individual

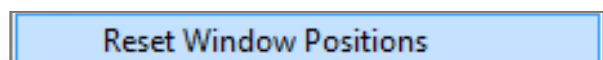
#### View Both

View file and data corresponding to individual



### Window

#### Reset Window Positions



# Secondary Functions Toolbar

Refer to pg 17

## Search

### Dynamic Search

Double Click or Drag to “Document Criteria” column

#### Document Description

All Documents with Description

#### Document Dates

Any date associated with document or folder

*Document Date*

*File Date*

*Scan Date*

#### Folder Name (Preferred)

Enter Name of Individual

*Last, First*

#### Folder Indices ...

*District of Residence Code*

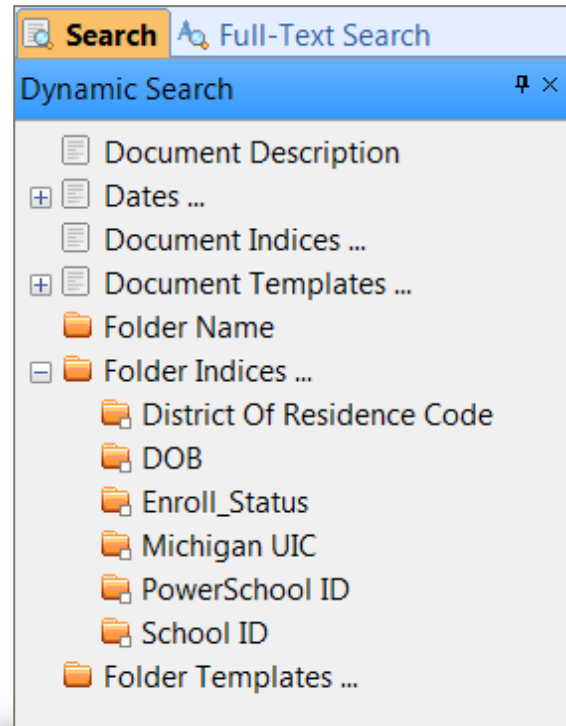
*Date of Birth (DOB)*

*Enrollment Status*

*Michigan UIC*

*Powerschool ID*

*School ID*



# Classic Search

Select Documents using following Combinations

## Folder Name

Name of Individual  
*Last, First*

## Folder Name, Document Description, and Date

Name of Individual  
All Documents with Description  
Any date associated with document or folder  
*Document Date*  
*File Date*  
*Scan Date*

## Folder Index

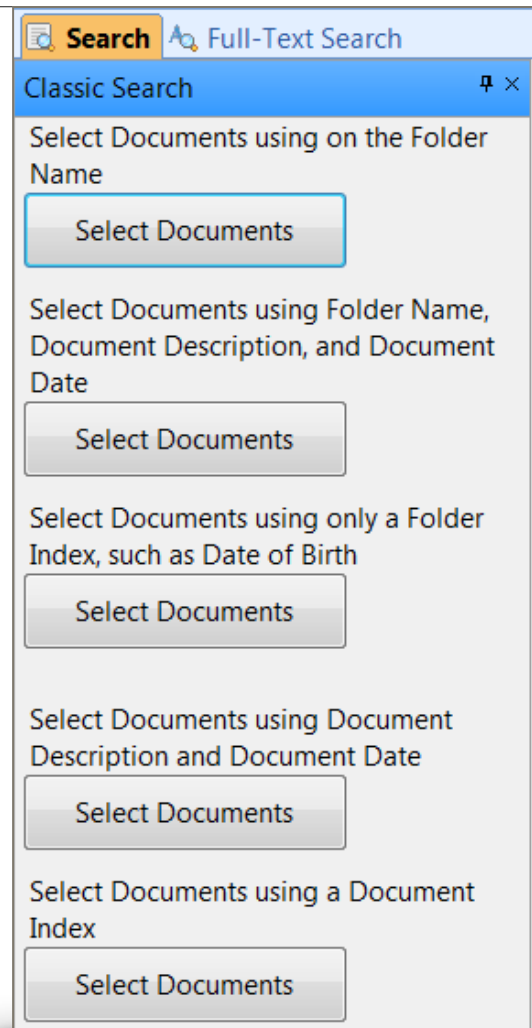
n/a

## Document Description and Date

All Documents with Description  
Any date associated with document or folder  
*Document Date*  
*File Date*  
*Scan Date*

## Document Index

n/a



# Folder and Document Criteria

## Search Criteria

Different combinations allow broad to narrowed searches

Check "Value Requires" to enter numerical values

Refer to pg 33 and pg 34 for search selections

The 'Folder Criteria' dialog box contains the following fields and options:

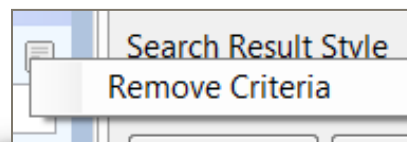
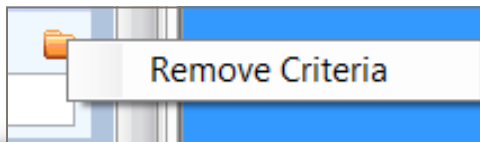
- Folder Name:** A text input field.
- Folder Indices:**
  - District Of Residence Code:** A text input field with a checked 'Value Required' checkbox.
  - DOB:** A text input field with a checked 'Value Required' checkbox. Below it are 'From' and 'To' date pickers with values '01/01/1900' and '11/07/2014' respectively.
  - Enroll Status:** A text input field with a checked 'Value Required' checkbox and the value '0' entered.
  - Michigan UIC:** A text input field with a checked 'Value Required' checkbox.
  - PowerSchool ID:** A text input field with a checked 'Value Required' checkbox.
  - School ID:** A text input field with a checked 'Value Required' checkbox.

The 'Document Criteria' dialog box contains the following fields and options:

- Document Description:** A text input field.
- Document Date:** A text input field with a checked 'Value Required' checkbox. Below it are 'From' and 'To' date pickers with values '01/01/1900' and '11/07/2014' respectively.
- Document Date:** A text input field with a checked 'Value Required' checkbox. Below it are 'From' and 'To' date pickers with values '01/01/1900' and '11/07/2014' respectively.
- File Date:** A text input field with a checked 'Value Required' checkbox. Below it are 'From' and 'To' date pickers with values '01/01/1900' and '11/07/2014' respectively.
- Scan Date:** A text input field with a checked 'Value Required' checkbox. Below it are 'From' and 'To' date pickers with values '01/01/1900' and '11/07/2014' respectively.

## Remove Search Selections

Folder of Document on the right upper hand



*Edit*

## Document Description

*“Edit”*

Change to Corresponding Template, if no template refer to pg 13

## Dates

*“Edit”*

Should be date that is apparent on Documents

## Departments & Folders

**Must Add Folder First in Order to Remove Original/Incorrect Folder**

*“Add”*

Search Window

Double Click Individual to Select

*“Remove”*

Removes Highlighted Folder

View Document Data			
Document Description			
Picture/Audio/Taping Release Form			
Dates			
Document Date	9/13/2013	<a href="#">edit</a>	
Scan Date	6/23/2014		
File Date	7/10/2014		
Retention Start Date	7/10/2014		
Retention Period			
Departments & Folders			
Department	Folder	Folder Index	Index Value
Adams STEM Academy 2825			
	District Of Residence Code		
	DOB		
	Enroll_Status		
	Michigan UIC		
	PowerSchool ID		
	School ID		----
			<a href="#">remove</a>
Document Indices			
Document Index	Index Value	Page	
Notes			

# Revise Document ...

## Edit Document

Ctrl+Shift+R

Secondary window will pop-up

Editing opinions refer to pg 24

Search Full-Text Search Picture/Audio/Taping Release Form

1 Best Fit

**YPSILANTI**  
COMMUNITY SCHOOLS  
1801 Parkway Rd  
Ypsilanti MI 48197  
Fax (734) 714-1200 Phone (734) 714-1204

**Student Enrollment Form**  
Release Request (page 1 of 1)

**Picture, Audio Taping and Video Taping Release Form**

Throughout the year, photographs, video/digital recordings are taken of students for use in Ypsilanti Community School classes, web page, community publications and advertising. Students may occasionally be video/digital and/or audio taped to document instructional practices, student performance issues, extra or co-curricular events at Ypsilanti Community Schools, or to allow the news media to cover such events. Please sign below if you give permission for Ypsilanti Community Schools to photograph, video/digital or audio tape your child.

Parent Signature \_\_\_\_\_ Date 9/13/13

Student Signature \_\_\_\_\_ Date \_\_\_\_\_

Page 1

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504 Plan  
Academic Achievement Concerns  
All Early Childhood Documents  
Attendance Letters  
Attendance Records  
AUP Form  
Authorization for Advocacy  
Authorized Release/Exchange of Information  
Birth Certificate  
Birth Certificate  
Court Documents  
Disciplinary  
Doctor notes  
Enrollment Forms  
Exit Form  
FERPA  
Free/reduced meal docs.  
Friend of the Court Documents  
Guardianship Documentation  
HeadStart  
Health Records  
Hearing/Vision Sheets  
Homebound Services  
Immunization  
Immunization Waiver Form  
Incident Report  
Intervention Log  
Kindergarten waiver  
Letter from Parent  
Letter of Retention  
Medical Consent  
Michigan Reading & Writing Progress Portfolio  
Parent, Student, and Teacher Contract  
Parking Permit  
Passport/Visa  
Picture/Audio/Taping Release Form  
Previous School District Documents  
Proof of Disability  
Proof of Income  
Proof of Residency  
Referrals  
Resideancy Affidavit  
Scholastic Data (Report Cards, Transcripts and Progress Report)  
SOC (School of Choice) Form  
Test Records (MEAP, ACT, Explorer, SAT...)  
Transportation (Inquiries, Concerns, Issues)  
Washtenaw County Community Support & Treatment Services (CSTS)  
Work Permit  
YCS COPPA Compliance Form  
YCS Exit Form  
YCS Internal Student Transfer Request Form  
YCS Military Information

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## Current Student & Staff Document Descriptions

