Washtenaw I S D
A REGIONAL EDUCATIONAL SERVICE AGENCY

WISD CEO Image — Training Manual

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CEO

About

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CEO is a comprehension 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.
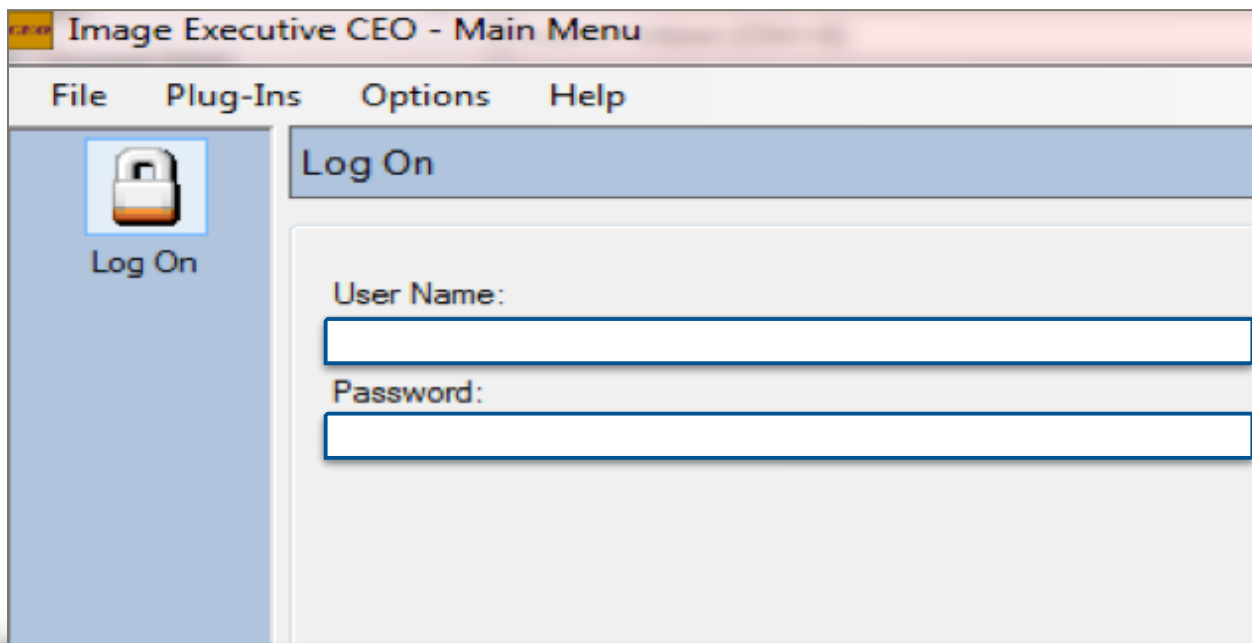
Dashboard

Login
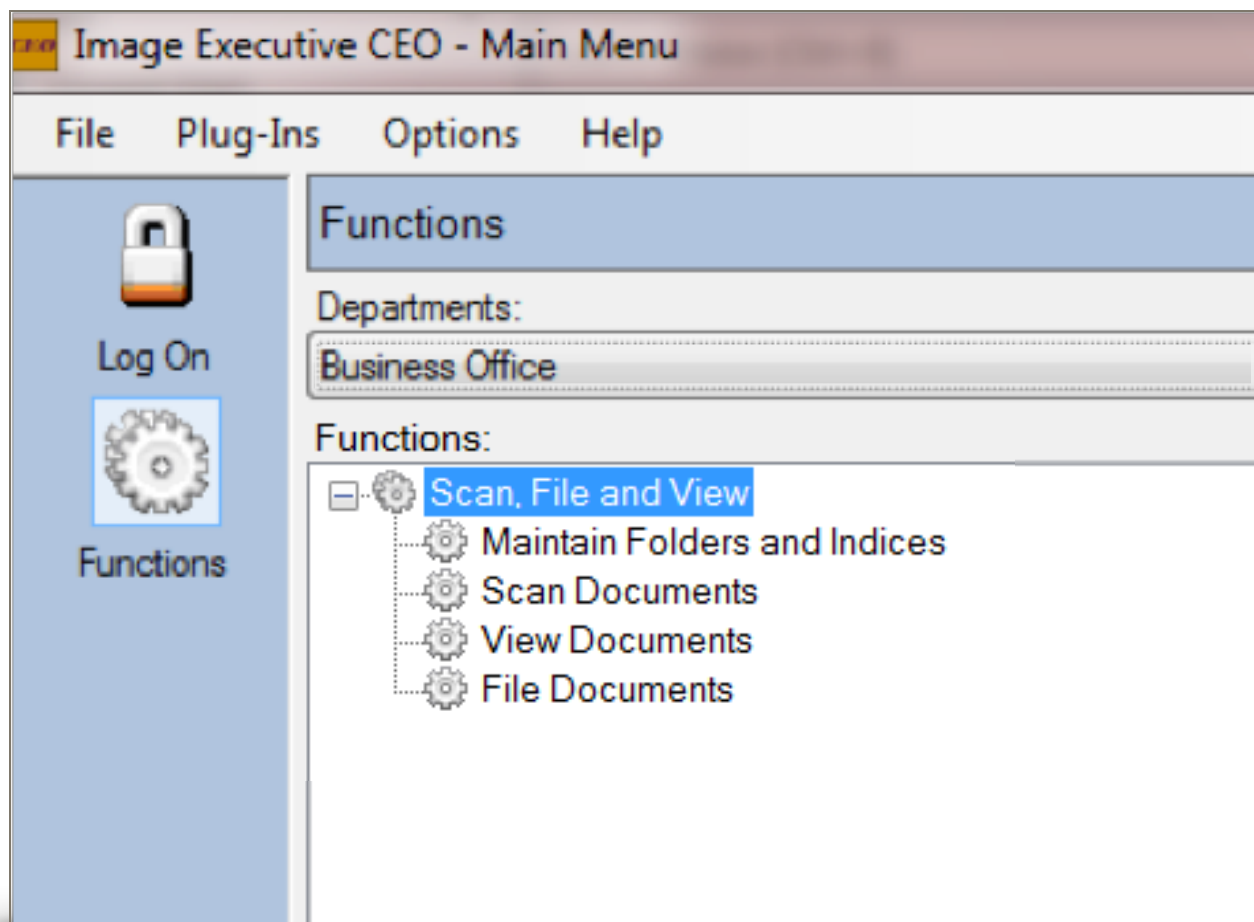

After Installation

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

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
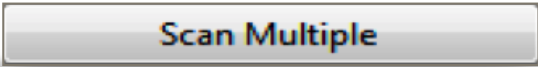### Place Documents in Scanner
Facing Away and Upside Down

Step Three
Scan Multiple
Scan All Documents

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*
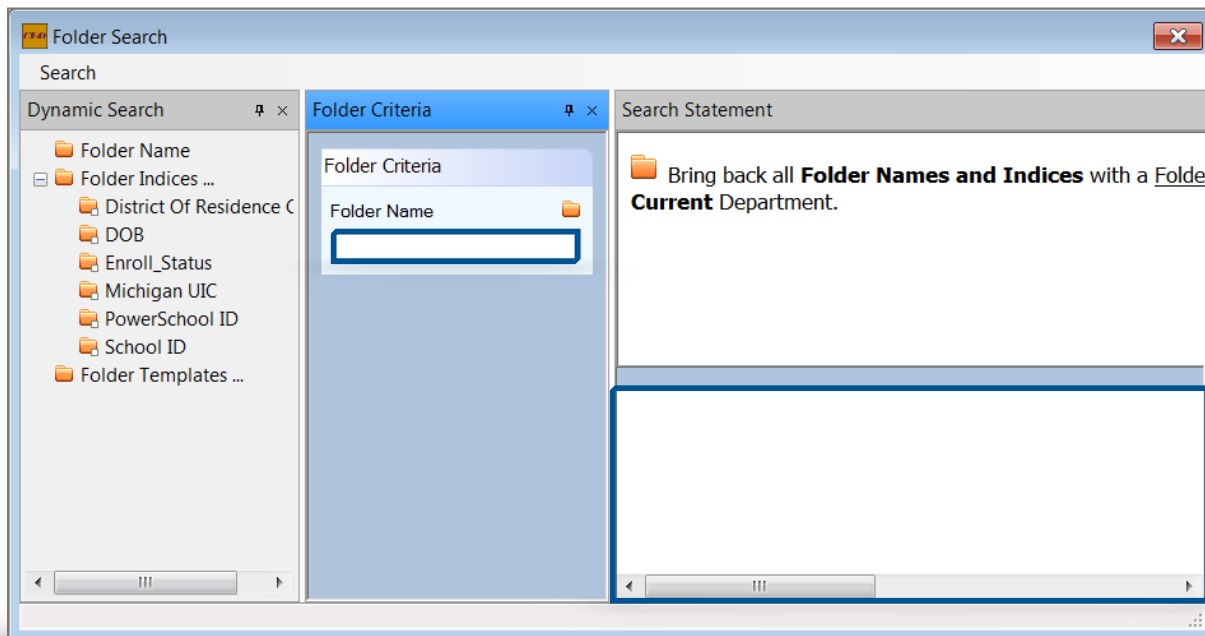
      Press *Enter*

            Individual will display in *Search Statement*

Double Click Desired Individual

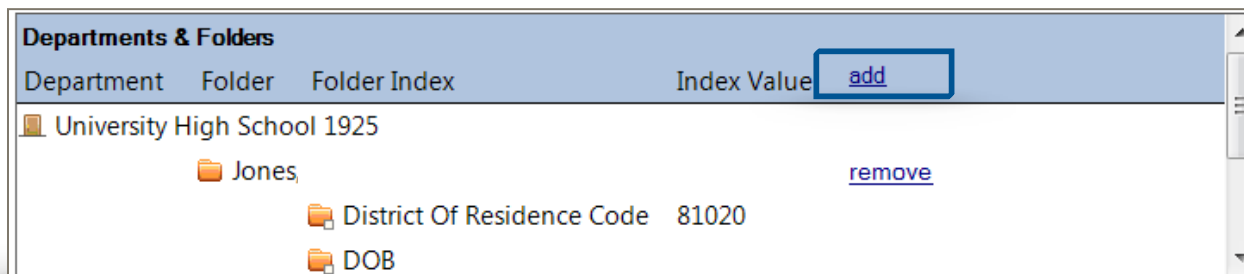   Individual selected should correlate to individual displayed

      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*

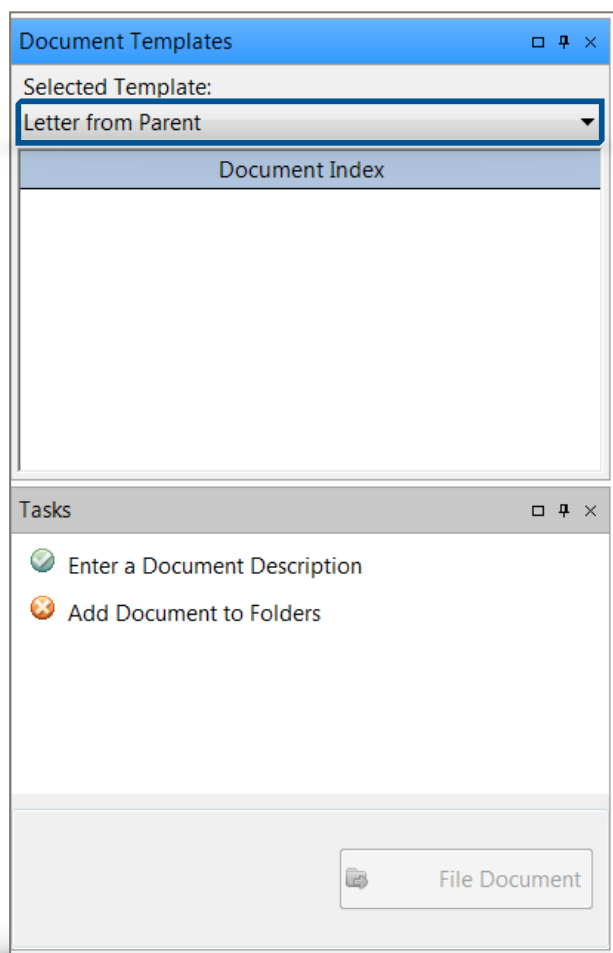   Refer to pg 30 for search options

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

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

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

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

Step Two
Select Document
Double Click *Document Description*

View both Document Data and File

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

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"
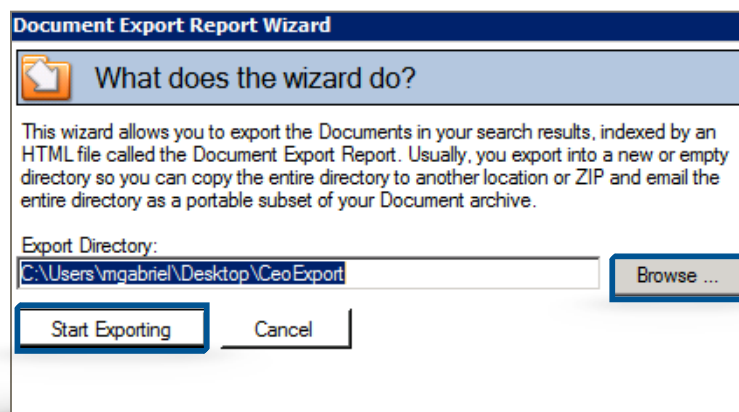
Export Documents Report Wizard

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*"
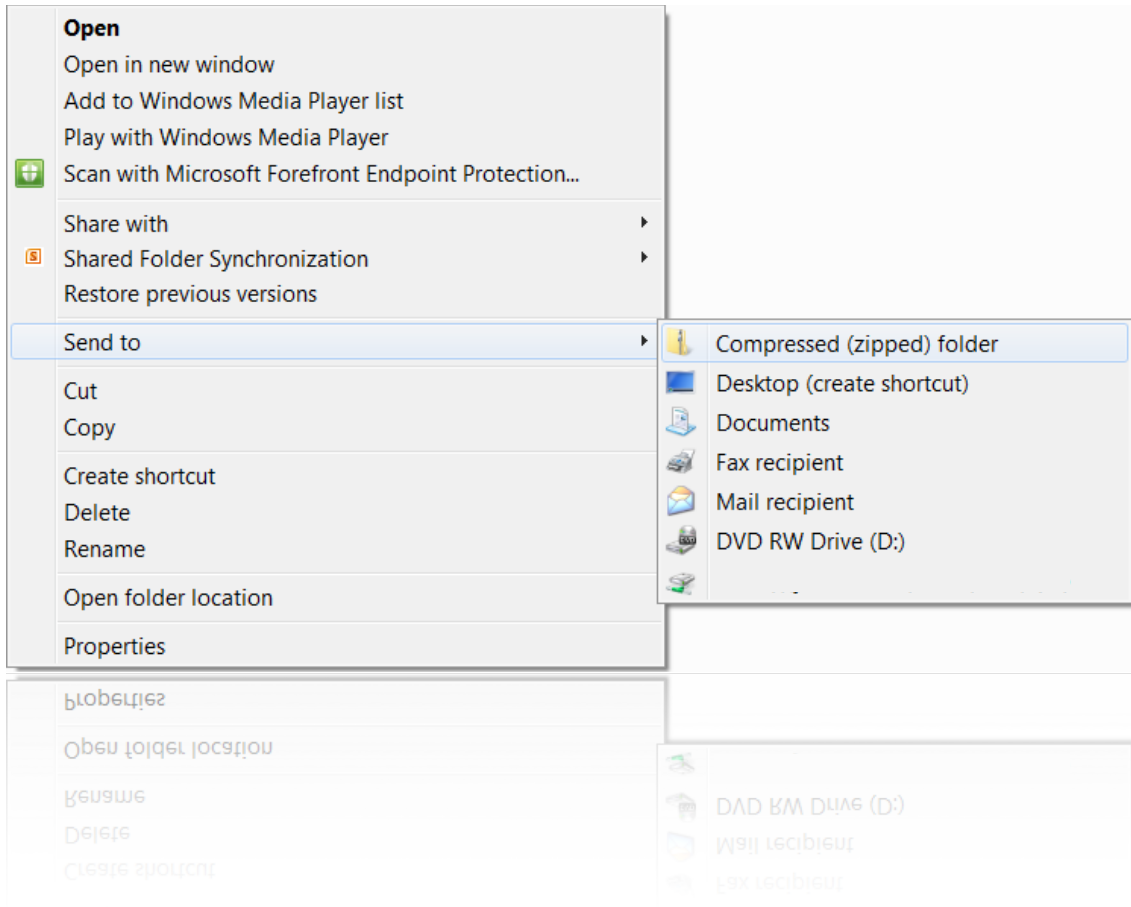
Maintain Folders and Indices

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"*
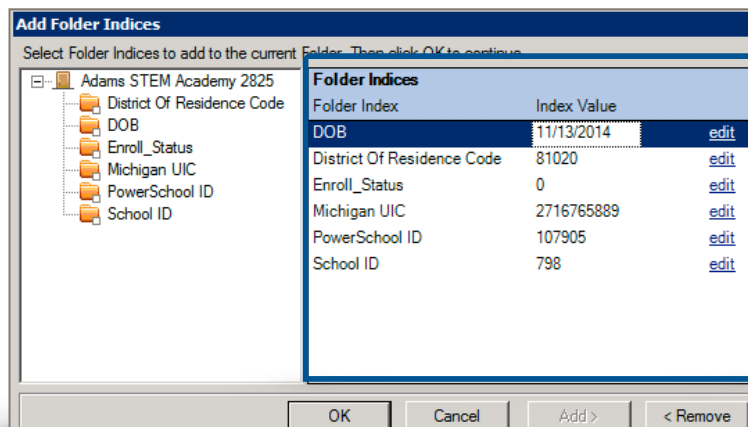
Departments
Department is already associated to Folder, no editing necessary

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
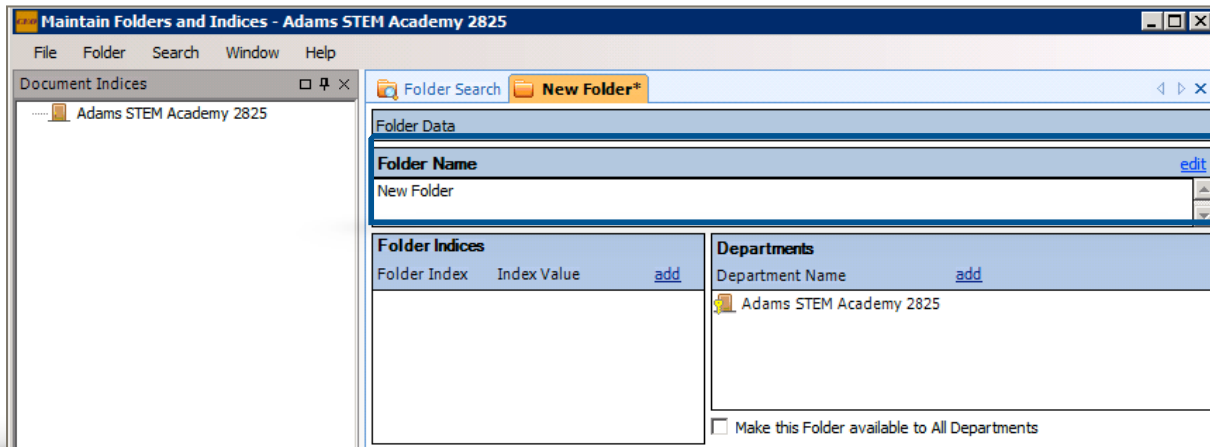   document.
            Click "*OK*"
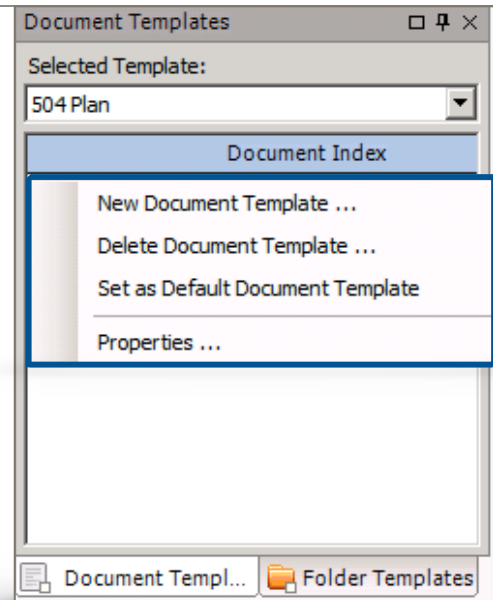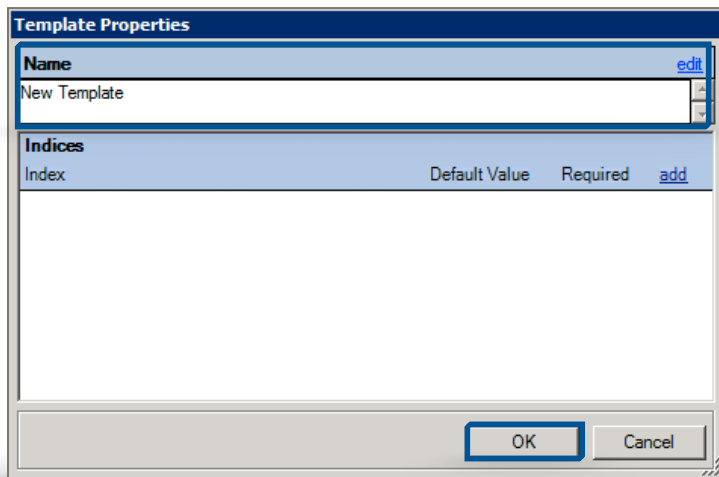
Delete Document Template

Selete Delete Document Template…

Modify Document Template

Properties…
Template Properties dialog box appears
      "*Edit*"
            Change name to appropriate template

Scan Documents
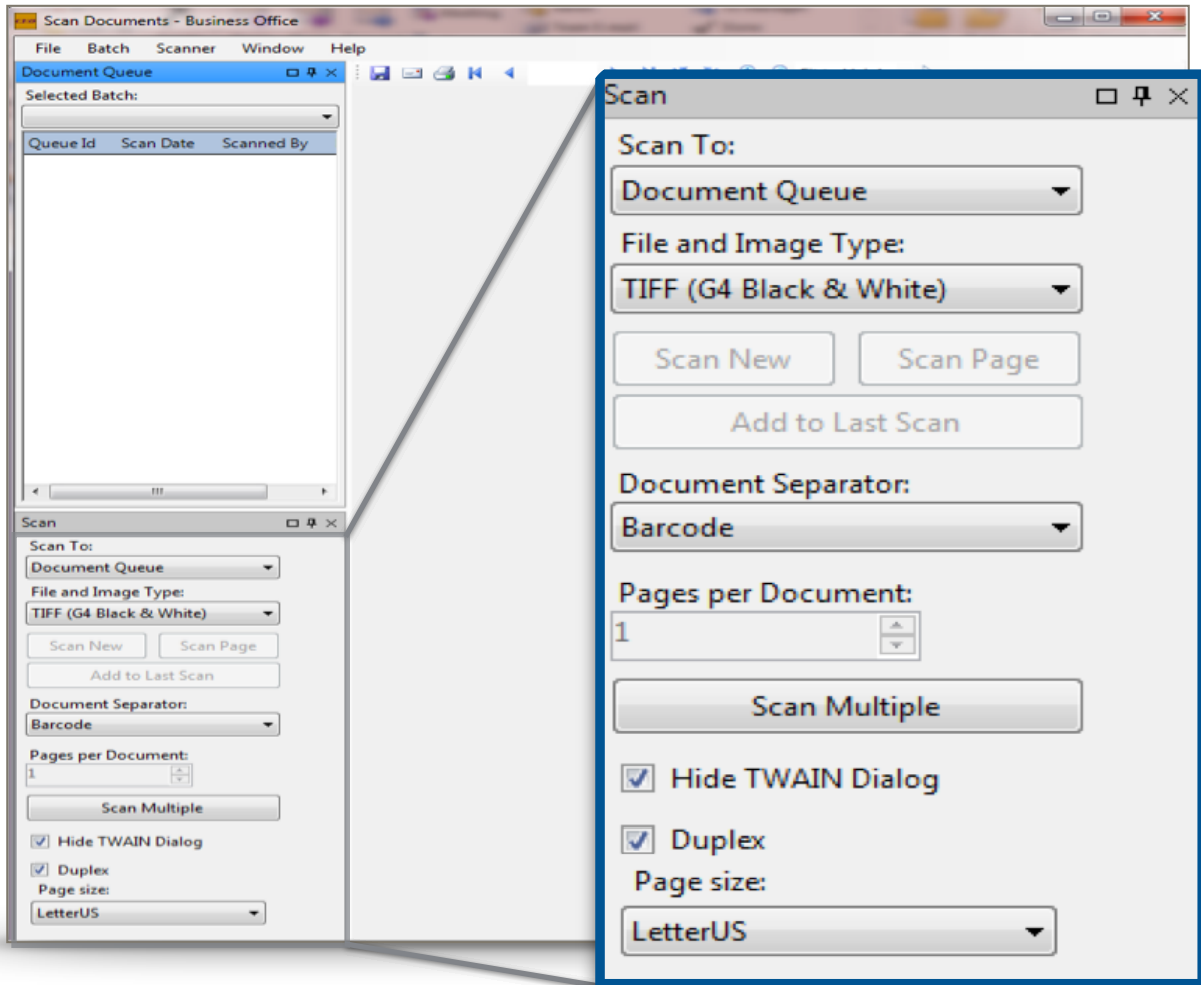
Scan Window

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
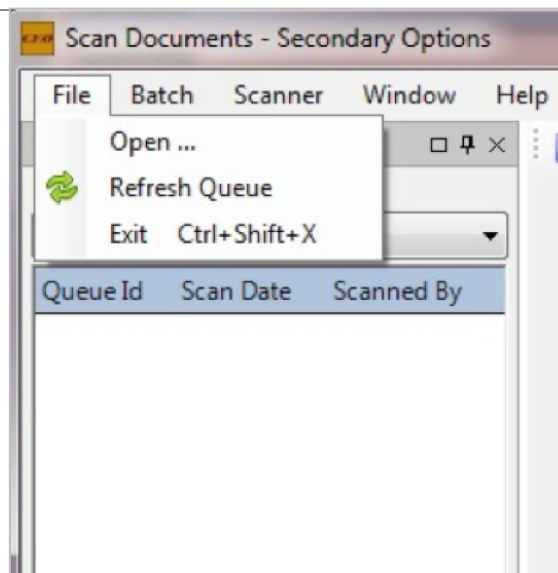
Batch

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
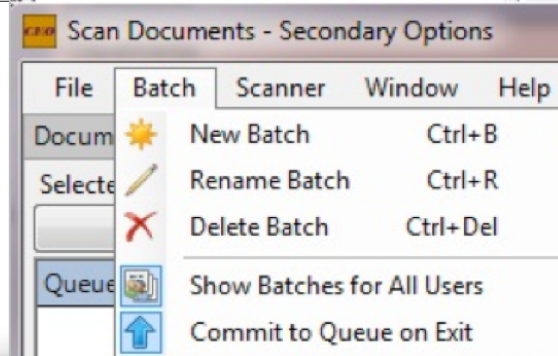
Window

Reset Window Positions
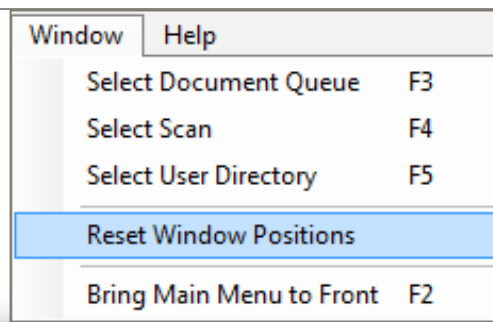
Secondary Functions Toolbar
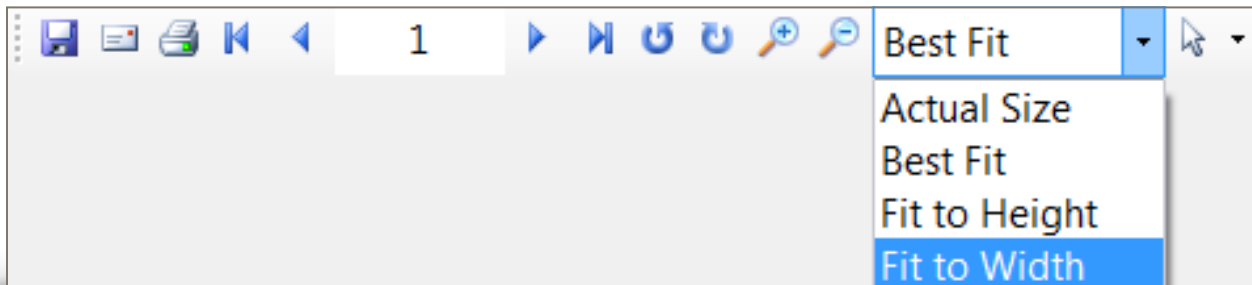
Save
Document saved as *.tiff* to folder

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
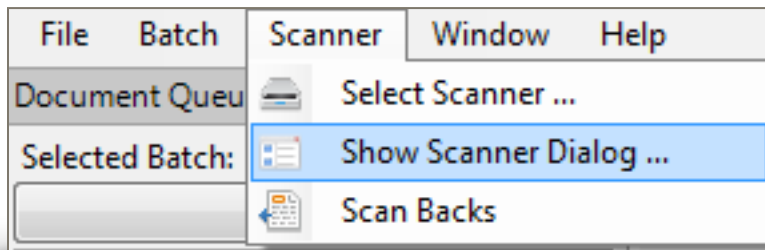
Following link to download driver:

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

Show Scanner Dialog …

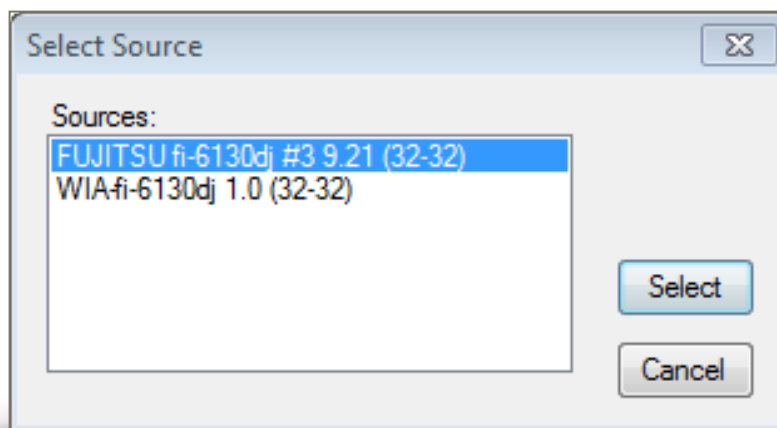## Brightness, Threshold, and Contrast
Change for best quality of Scanned Documents

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

Blank Page Tolerance

Filter for All Future Documents

Most Sensitive
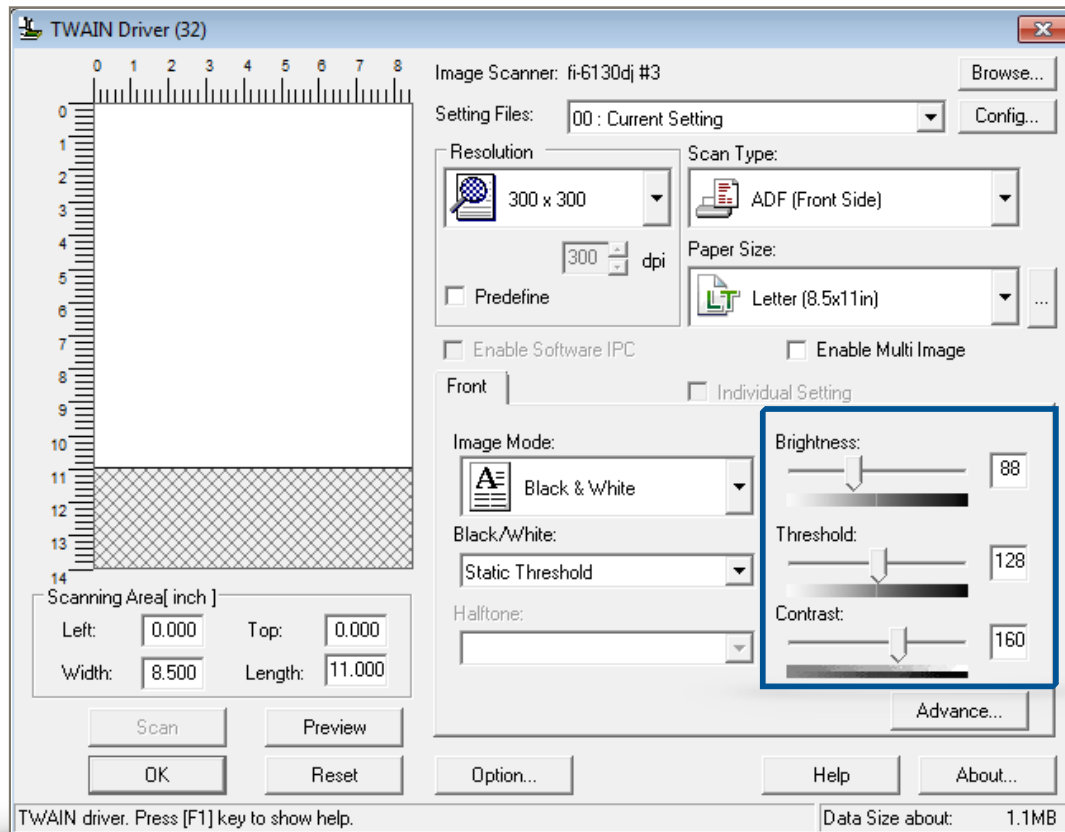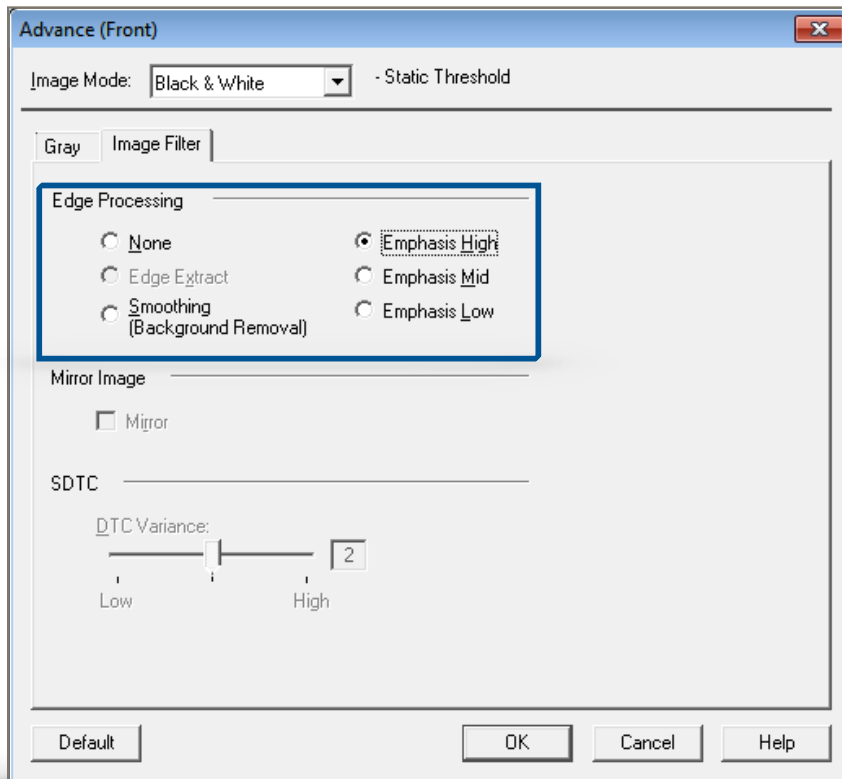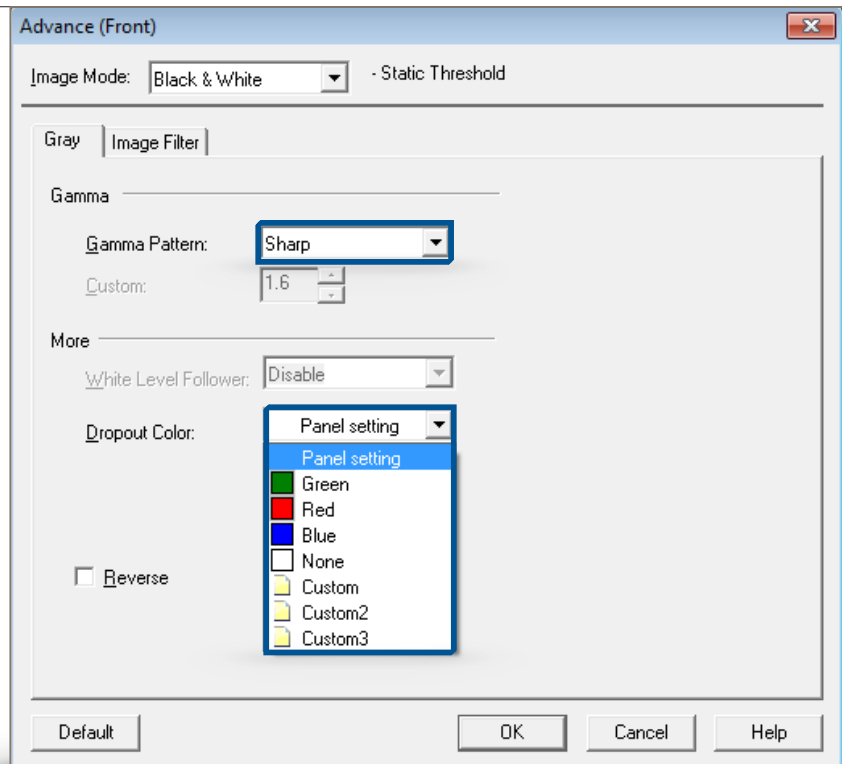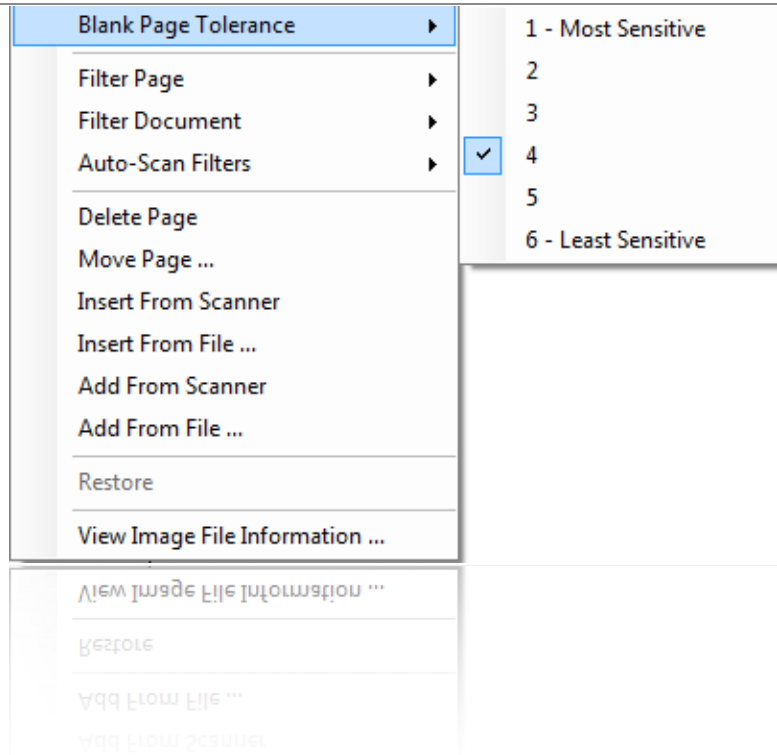Detects lighter marks
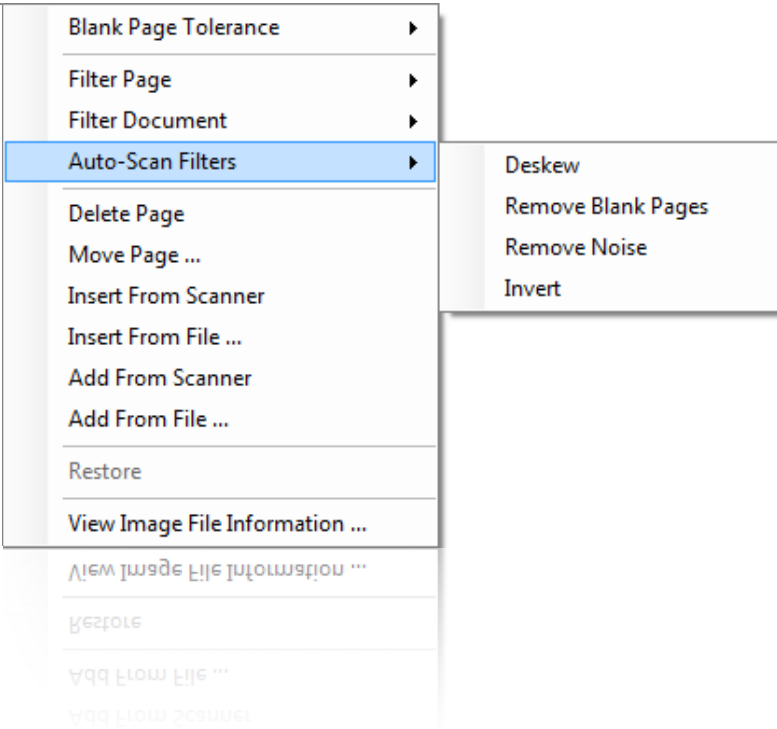> Pages within entire range of contrast will scan

Least Sensitive
Detects darker marks
> Only pages within range of contrast will scan

Blank Page Tolerance ▶	1 - Most Sensitive
Filter Page ▶	2
Filter Document ▶	3
Auto-Scan Filters ▶	✔ 4
Delete Page	5
Move Page ...	6 - Least Sensitive
Insert From Scanner	
Insert From File ...	
Add From Scanner	
Add From File ...	
Restore	
View Image File Information ...	

Auto-Scan Filters

All Documents
Deskew
Erase Region
Remove Blank Pages
Remove Noise
Invert

Blank Page Tolerance ▶	
Filter Page ▶	
Filter Document ▶	
Auto-Scan Filters ▶	Deskew
Delete Page	Remove Blank Pages
Move Page ...	Remove Noise
Insert From Scanner	Invert
Insert From File ...	
Add From Scanner	
Add From File ...	
Restore	
View Image File Information ...	

Window Components

Selected Batch

Appears as username - date and time

> Rename batch to individual (*Last, First*)
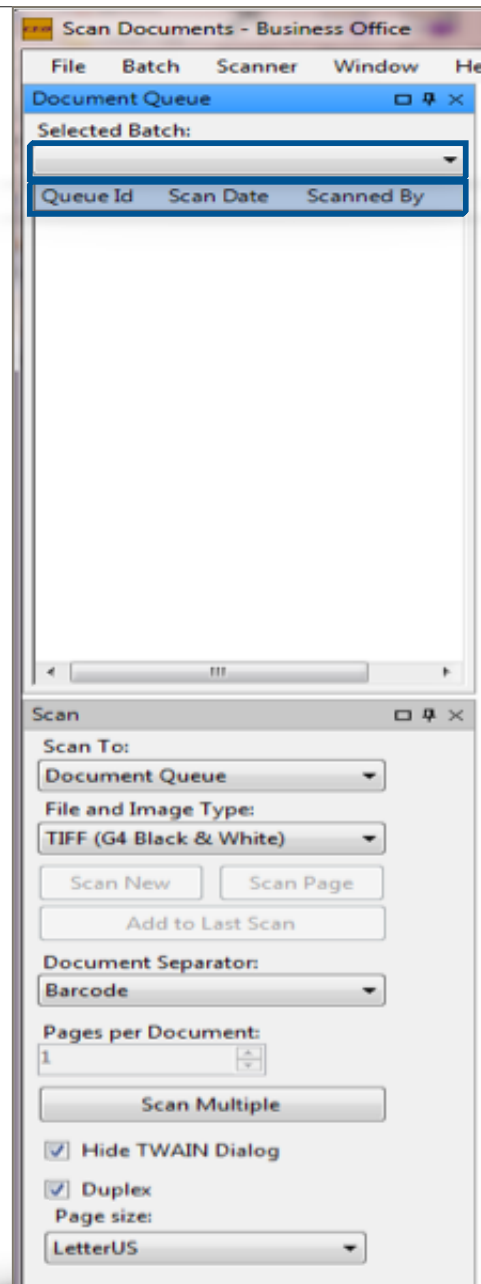
Queue Id

Number of the Document(s) Scanned

Scan Date

Date Document Scan
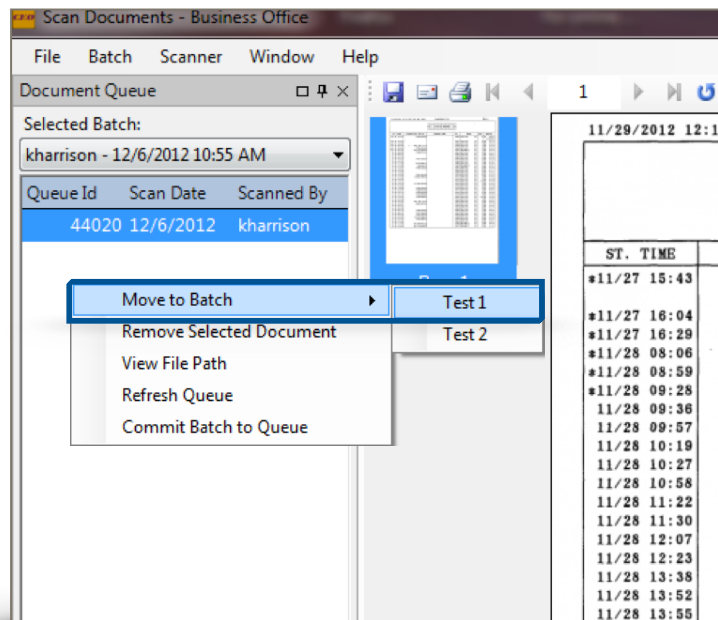
Scanned By

Scanning by User

Edit: Queue within Batch

Batch Context Window

Right Click Queue Batch Window

Move to Batch

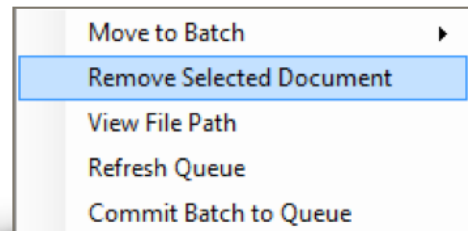Selected queue to move to other batch

Remove Selected Document

Highlighted queue will be deleted indefinitely
> *Are you sure?*
>> If yes, click *Remove Selected Document*

Commit to Queue on Exit

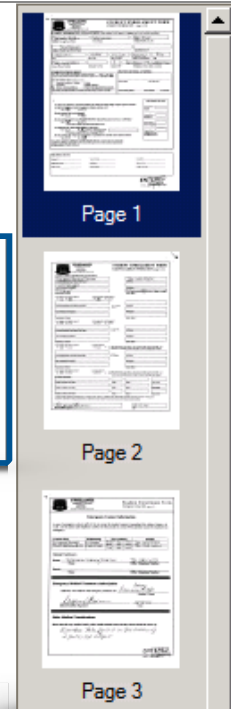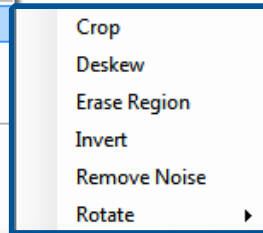Select for Scanned Documents to save upon Exit
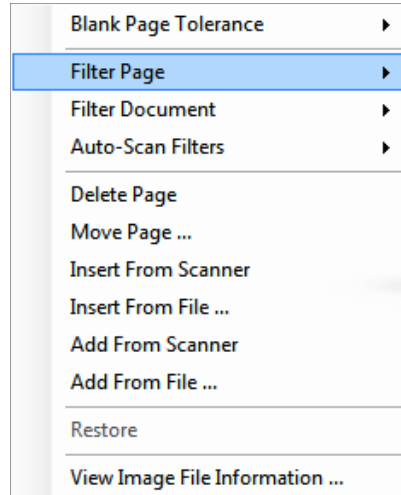
Edit: Documents within Queue

Queue Thumbnail Context Window

Right Click Thumbnail Window

Filter Page
Page Highlighted within
Queue

       Crop
       Deskew
       Erase Region
       Invert
       Remove Noise
       Rotate

Blank Page Tolerance	▶
Filter Page	▶
Filter Document	▶
Auto-Scan Filters	▶
Delete Page	
Move Page ...	
Insert From Scanner	
Insert From File ...	
Add From Scanner	
Add From File ...	
Restore	
View Image File Information ...	

Filter Page submenu:
Crop
Deskew
Erase Region
Invert
Remove Noise
Rotate ▶

Page 1
Page 2
Page 3

Filter Document
Queue Highlighted within Batch

       Deskew
       Invert
       Remove Blank Pages
       Remove Noise
       Rotate

Blank Page Tolerance	▶
Filter Page	▶
Filter Document	▶
Auto-Scan Filters	▶
Delete Page	
Move Page ...	
Insert From Scanner	
Insert From File ...	
Add From Scanner	
Add From File ...	
Restore	
View Image File Information ...	

Filter Document submenu:
Deskew
Invert
Remove Blank Pages
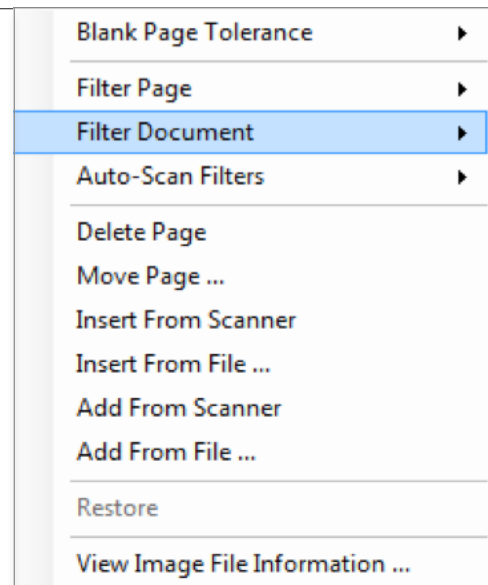Remove Noise
Rotate ▶
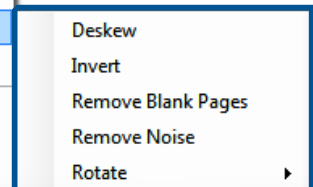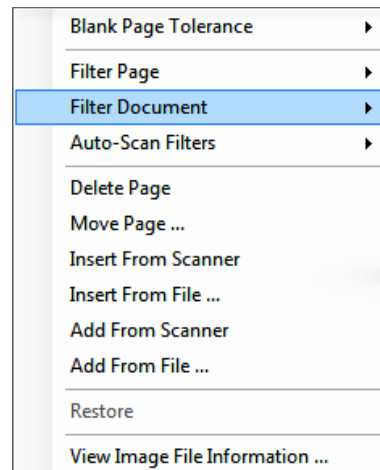
Queue Thumbnail Context Window

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
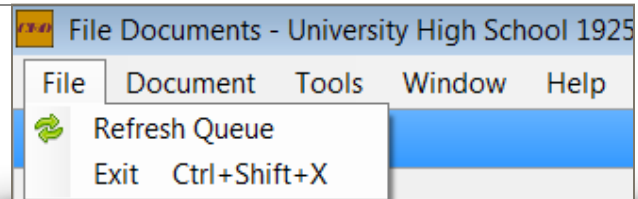
Document

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
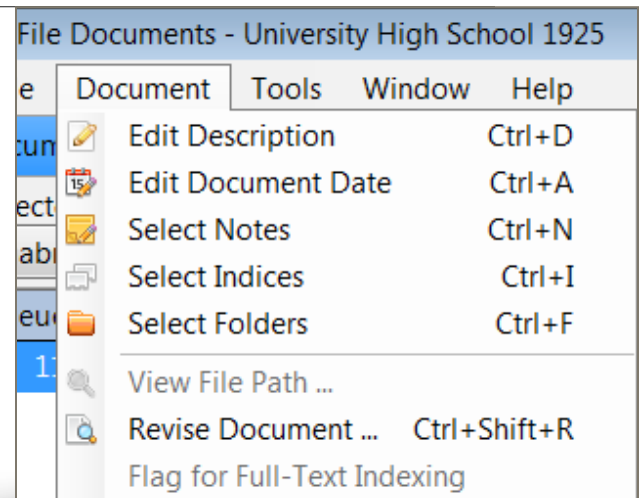> Only for necessary comments regarding document
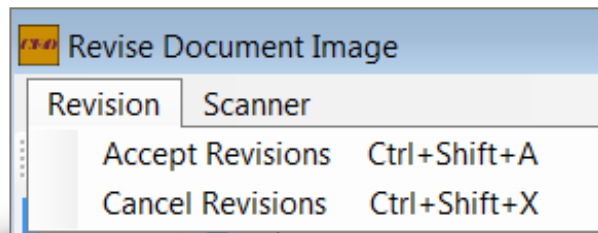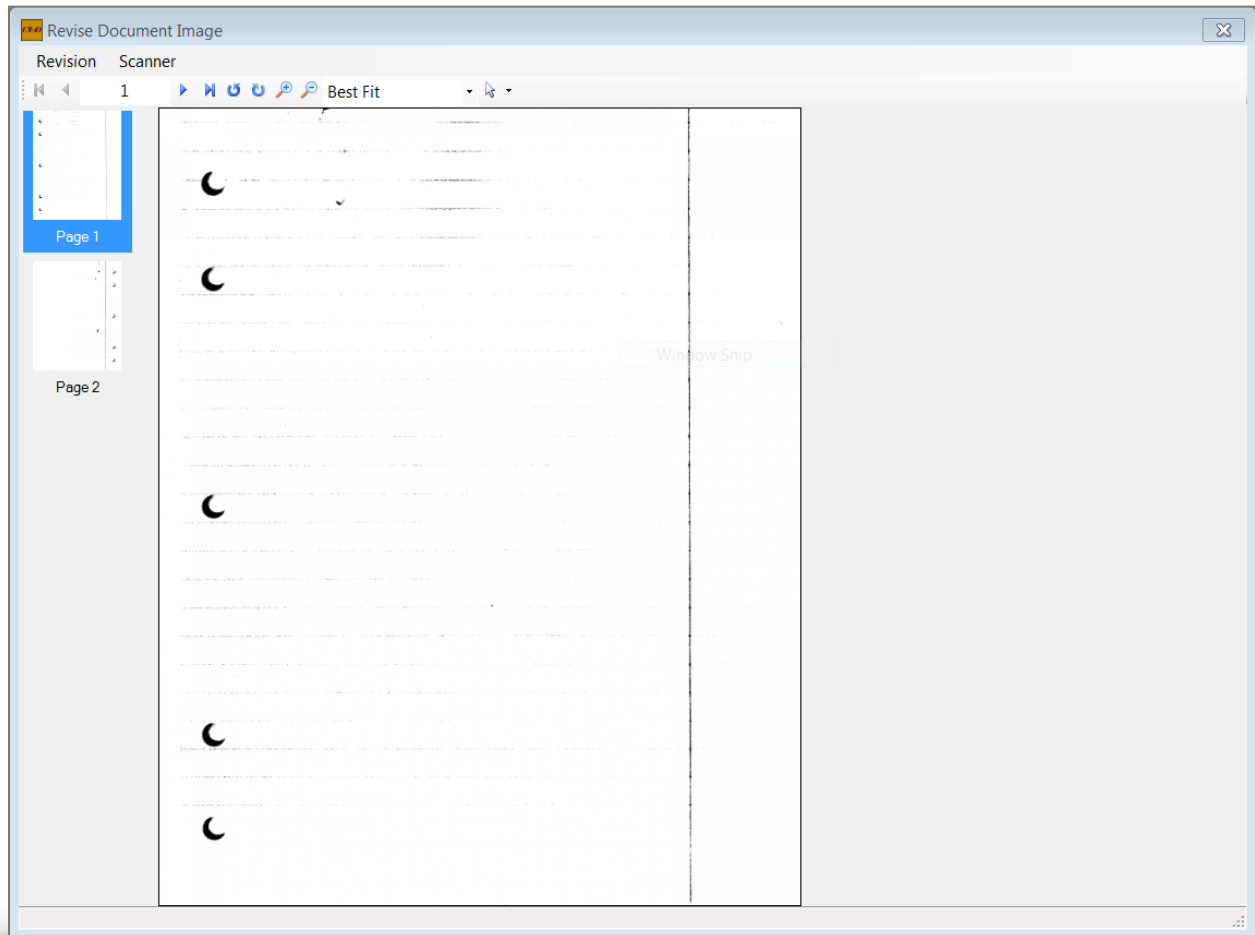
Select Indices
n/a

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

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
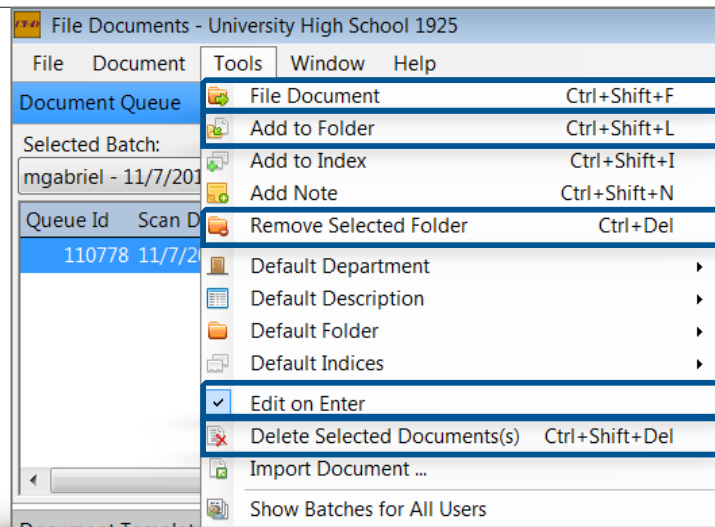
Tools

Default Department

Current
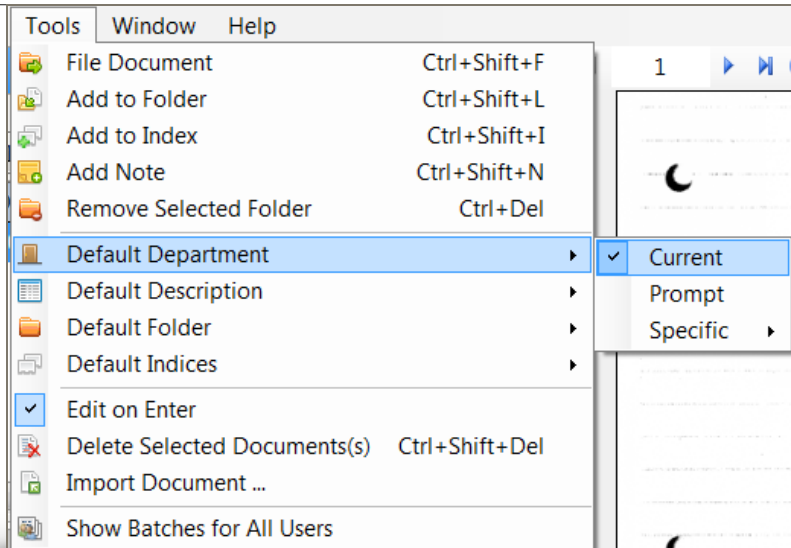
Default Description

Template Name
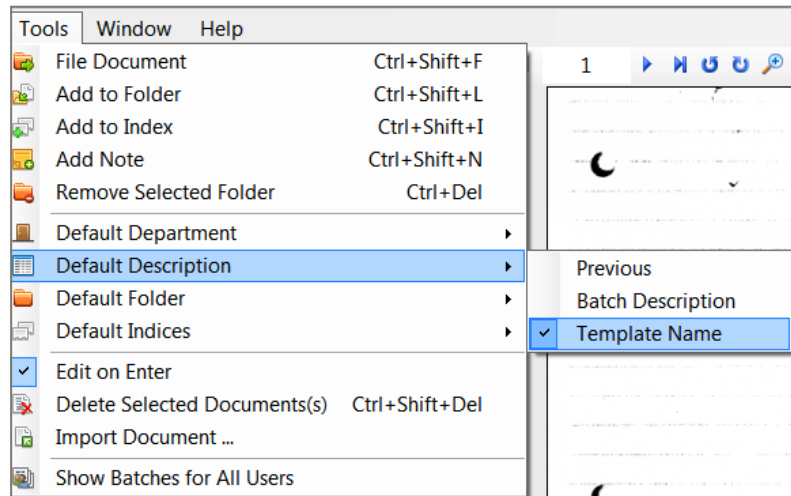
Default Folder
Search
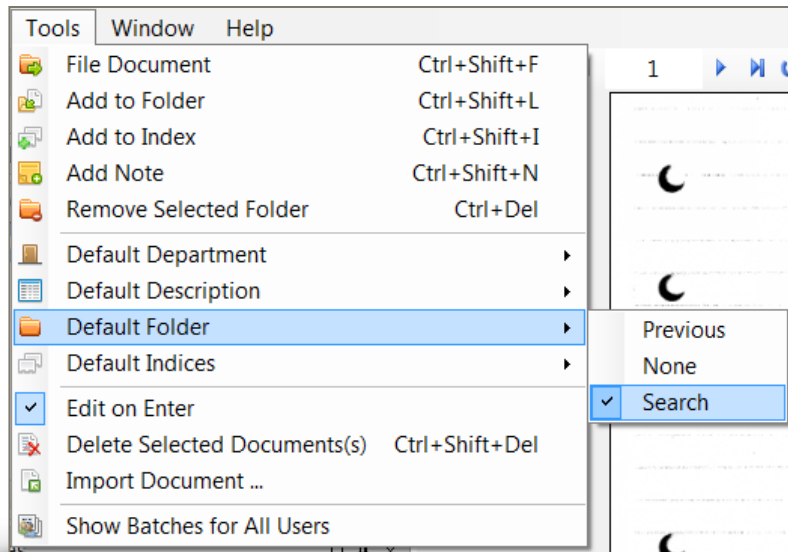
Default Indices
Previous
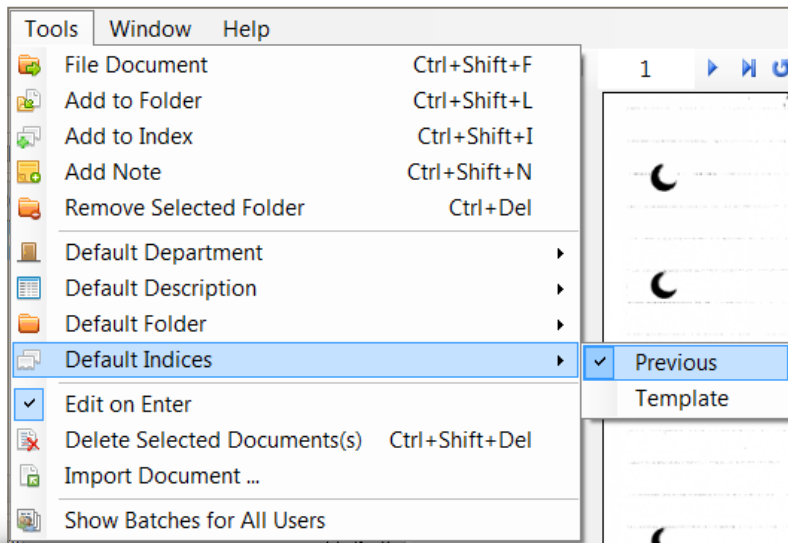
Window

Reset Window Positions

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
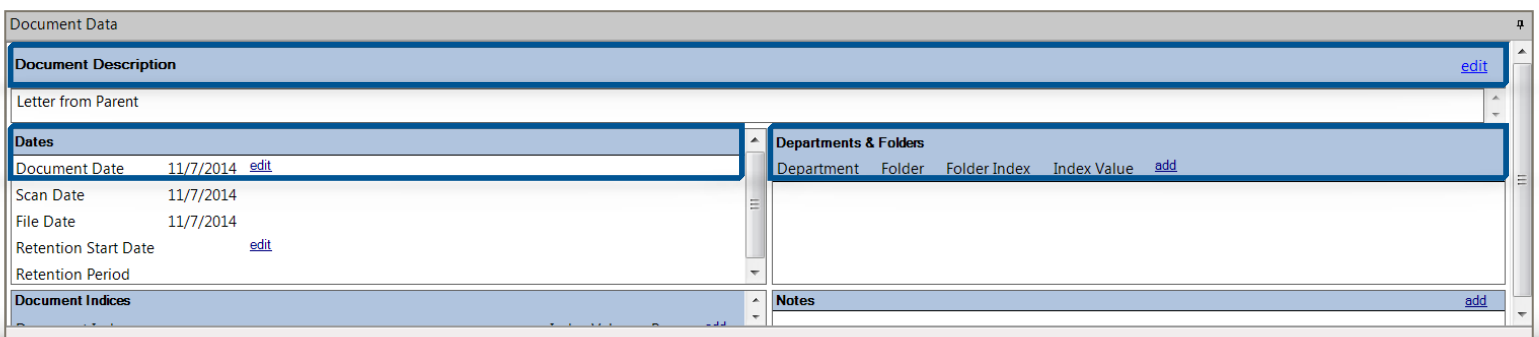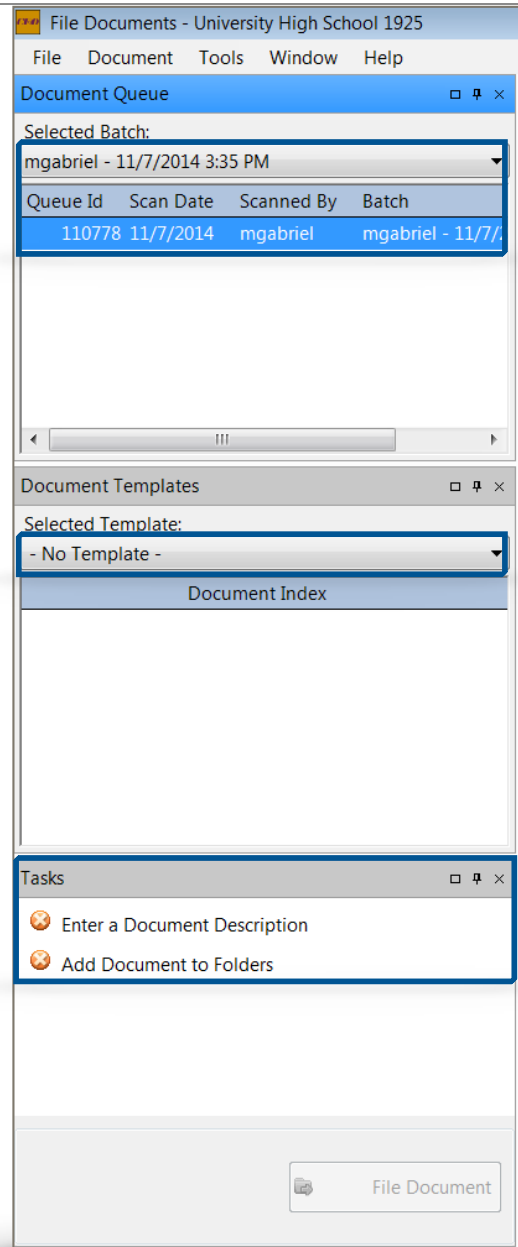
View Documents

Toolbar

File

Exit
Ctrl+Shift+X
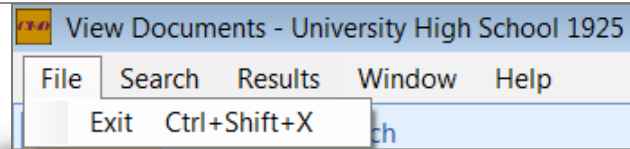
Search

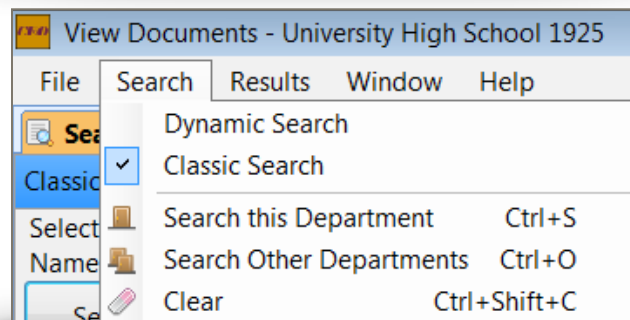### Dynamic Search
Search using custom combination of criteria.
Refer to pg 33
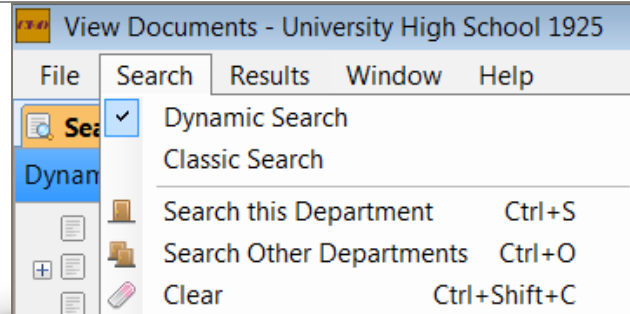
Classic Search
Search by predetermined combinations.
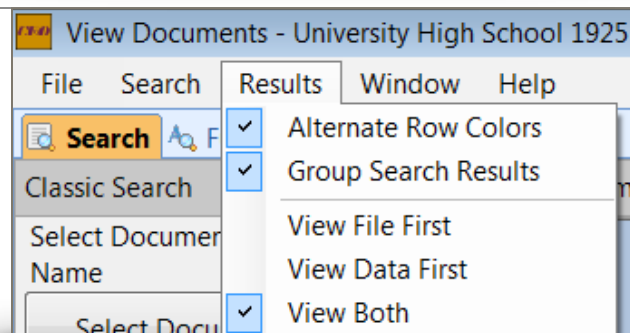Refer to pg 34

Results

Alternate Row Colors
Search results will alternate in color for each line

Group Search Results
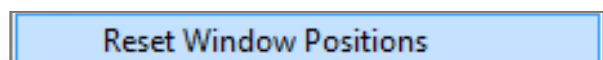Bunches with documents associated with individual

View Both
View file and data corresponding to individual

Window

Reset Window Positions

Secondary Functions Toolbar

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
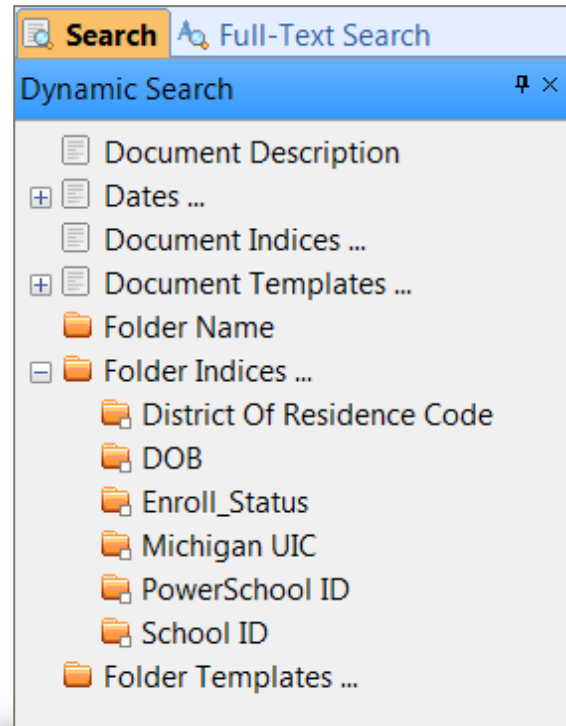*Last, First*

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
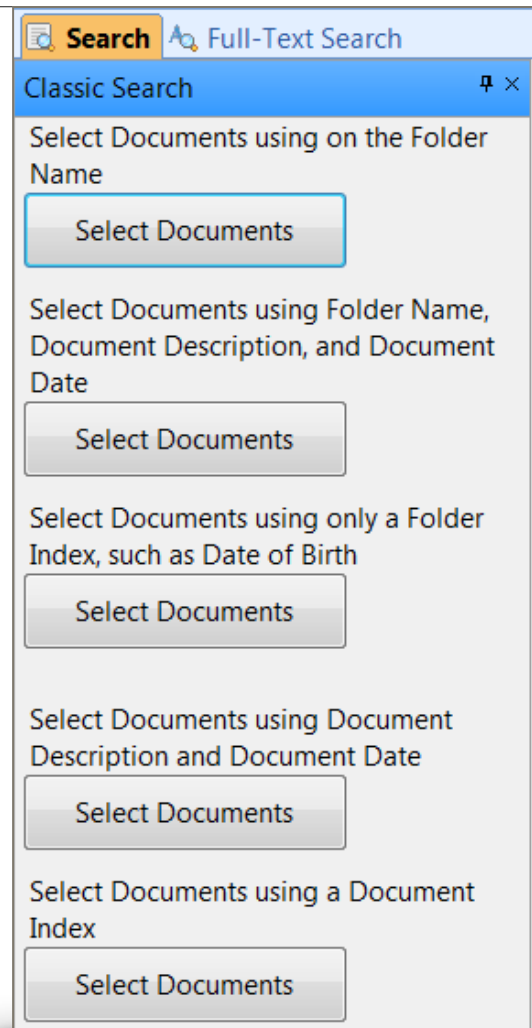 *Scan Date*

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

Remove Search Selections

Folder of Document on the right upper hand
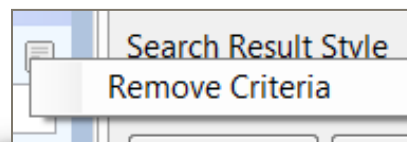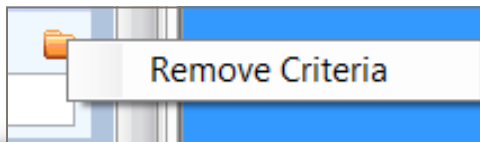
Edit

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

Revise Document …

<u>Edit Document</u>
Ctrl+Shift+R

      Secondary window will pop-up

      Editing opinions refer to pg 24

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 Count 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