



Document Management Questionnaire

Company Name: _____ Contact: _____

Contact Phone: _____ E-mail: _____

Document Questions:

Briefly describe the documents to be processed and related business processes.

Are the documents structured and repetitive? An example would be an "internal" document, such as, a "signed" proof of delivery or a packing slip with hand written notes. _____

Are the documents single sided (simplex); double sided (duplex) or both? _____

Are the documents single page or multi-page or both? _____

If multi-page, is the first page a "control" page with "control" data? _____

If single page, is there "control" data on each? (ex: Invoice #) _____

How many documents, per day, to process for this application? _____

How many documents (in total, estimate) could the repository contain? _____

What is the preferred method of document separation, if required? (bar code, blank page, on line, other) _____

Quality and type of documents?

For example dot matrix, laser, black and white, color, size etc. _____

Is there a bar code printed on any documents? _____

How many documents per day / week / month? _____



Database Questions:

Do the documents you wish to process correspond (logically relate) to any data on your PC or network for purposes of validation? _____

Note: Validation is the function of entering data (manually or automatically via OCR or bar code, etc) and performing a "lookup" to ensure the data entered is correct. If the answer to this question is NO, skip this section.

What is the form of the data? Database, Spreadsheet, Text file, etc. _____

If a database, what is the database engine? (ex: Access, MSDE, DB2, SQL, DBIV, Paradox, etc)

Do you have access to, or knowledge of, the database structure (data dictionary)? _____

NOTE: Data dictionary: In database management systems, a file that defines the basic organization of a database. A data dictionary contains a list of all files in the database, the number of records in each file, and the names and types of each field. Most database management systems keep the data dictionary hidden from users to prevent them from accidentally destroying its contents. Data dictionaries do not contain any actual data from the database, only book keeping information for managing it. Without a data dictionary, however, a database management system cannot access data from the database.

Does the database have an ODBC driver available? _____

(Short for Open DataBase Connectivity, a standard database access method. ODBC makes it possible to access any data from any application, regardless of which database management system (DBMS) is handling the data.)

Can you "export" the data into Microsoft Office software; such as, Excel, Access, Text? _____

Retrieval Questions:

What criteria will be used to retrieve your documents? Circle all that apply.

- | | | |
|------------------------------------|---|---|
| Windows (explorer type) navigation | Y | N |
| Database (backend) inquiry | Y | N |
| Full Content (every word) | Y | N |
| Search by indexing data only | Y | N |
| Restricted by security levels | Y | N |



Briefly describe security requirements:

Number of users requiring retrieval _____

Functional requirements questions:

- | | | | |
|---|---|---|---|
| Do you require "Version Control" (ability to finalize documents)? | Y | N | |
| Do you require workflow (routing of documents to individuals or groups)? | Y | N | |
| Do you require document annotations, redaction, stamps, etc? | Y | N | |
| Do you require voice over image technology? | Y | N | |
| Do you require a document/user audit log of viewing, saving, printing, faxing, emailing, etc? | Y | N | |
| Do you require "zone" OCR (selected areas converted to text)? | Y | N | |
| Do you require "batch" processing of documents? | Y | N | |
| Do you require document conversion from existing files/documents? | Y | N | |
| Do you intend to scan historic documents (back filing)? (Or start with new documents only) | Y | N | |
| Do you require consulting services to assist in the design and implementation of your document management system? | Y | N | |
| Do you prefer a "Client/server" or "Web based" document management solution? | C | W | |
| Do you have a "Server" based platform/repository or a Workgroup (peer to peer)? | S | W | |
| Do you prefer "Windows" login security or a Proprietary login? | W | P | |
| Do you intend to scan from a "Central" location or "Desktops" or both? | C | D | B |
| Do you currently own the required scanning equipment? | Y | N | |

