

## Questionnaire – Document Management Project

Below is a list of questions that can be used during a conversation with your customer to collect the high-level project information for a document management project.

Please respond with as much information as possible.

After submitting the form, you will receive an email with all questions and answers. You can use this email to add new information collected during follow-up conversations.

### Customer Info:

#### **Company \***

#### **Address \***

Address Line 1

Address Line 2

City

State / Province / Region

Postal Code

Country

#### **Name of Department (if multiple, please create a questionnaire per department) \***

### Primary Contact Information:

#### **Name \***

First

Last

#### **Title \***

#### **Email \***

#### **Phone number (optional)**

Current Processes & Archive:

**Do you scan and store any paper documents currently?**

**If yes, what type of scanner(s) do you use:**

- Dedicated scanners
- MFP (Multi-Function

**How are the documents named and how are they are organized in folders and subfolders?**

**Do you have a file room where paper documents are stored?**

**If yes, do you plan to convert all documents to electronic documents?**

**If you had one single goal for this project, what would it be? \***

Scope:

**Total number of potential system users in the department? \***

**Are all people located in a central facility? If not, how many locations are there and where? \***

Issues:

**Please briefly describe the primary issues you are having with documents – such as can't find the documents, many duplicates, time consuming renaming and classification etc.: \***

**These issues include: \***

- Paper Documents
- Email
- Electronic Documents
- Large format engineering / architectural drawings

File Naming Conventions:

**Do you use a shared file server to store your documents as PDF files?**

**If yes, do you have a standard methodology for naming folders, subfolders and files?**

**Describe per document type.**

*E.g.. Document Type: Supplier invoices, File Structure:*

*SUPPLIER/INVOICES/YYYYMM\_SupplierName\_ReversedInvoiceDate\_InvoiceNumber.pdf*

**Do you use a cloud-based system to store your documents?**

**If yes, please select your cloud-based system:**

- DropBox
- Google Drive
- Box
- OneDrive
- Other (please describe)

**If yes, do you have a standard methodology for naming folders, subfolders and files on your cloud-based system? Describe per document type.\***

*E.g.. Document Type: Supplier invoices, File Structure:*

*SUPPLIER/INVOICES/YYYYMM\_SupplierName\_ReversedInvoiceDate\_InvoiceNumber.pdf*

**Do you use a content management system to store your documents?**

**If yes, please select your content management system:**

- SharePoint
- DocuWare
- Alfresco
- DocuShare
- OpenText
- IBM
- Other (please describe)

**Do you use another system that is not mentioned above to store your documents?**

**If yes, please describe your other system:**

Useful Options:

**Do you want to store searchable PDFs?**

- Yes
- No

**Do you want to store super compact PDFs?**

- Yes
- No

**Do you have a database available that we can use to auto-complete data?**

**If yes, what type of database is this?**

- Yes
- No

*E.g SQL Server DB, MS Access DB, CSV, etc.*

**Is the data you want to extract often in handwriting or printed in a lower quality?**

- Yes
- No

**Do you have any additional notes regarding the above options?**