Document Management Questionnaire

Below is a list of questions that can used to establish the high-level project parameters for a document management project. Please respond with as much information as possible. When complete, we will review the questionnaire with you and resolve any questions you may have. We will use this completed questionnaire to contact potential vendors, or consultants, who may be able to help guide us through the process of purchasing a document management system.

Please provide the following:

1. Name of Department:

2. Primary Contact Information:
    a. Name:
    b. Title:
    c. Email:
    d. Phone:
3. Total number of potential system users in the Department:

4. Are all people located in a central facility?

5. If not, how many locations and where are they?

6. Please briefly describe the primary issues you are having with documents – such as can't find, many duplicates, etc.:

7. Do these issues include (Please explain):
    a. Paper documents

    b. Electronic documents

    c. Engineering / architectural drawing

    d. Records Management

    e. Workflow processes (manual processing such as an AP process)

    f. Microfilm or Microfiche (or other film type)?

    g. Email?

8. For the list of issues above, which do you consider the primary issue?

9. Are there any special types of documents, paper or electronic, that you deal with? (such as promissory notes, index cards, special types of paper, embossed seals on the paper, etc.)

10. Do you have and use a records retention schedule for paper and electronic documents?

11. If you use a shared file server (drive P and T), do you have a standard methodology for naming directory folders and subfolders? Or can each person use their own naming convention?

12. Do you have and use a standardized naming convention (taxonomy and metadata) for document naming, organization, and searching?

13. Do you use the metadata fields within Microsoft Office products? (File | Info | Properties)

14. What "back office" systems do you use such as an accounting system, HR, CRM, etc. (SAP, Salesforce, Workday, Oracle) Sometimes existing systems can be tied to the document management system so that a "customer letter" can be retrieved from the CRM system.

15. Do you have a shared drive system (P or T-type drives) for keeping electronic documents? If not, what do you use?

16. Does anyone store their files on their C-drive? Do you have a system backup for C-drives?

17. Do you already have a document management system (such as SharePoint or Office 365)?

18. Do you use any cloud-based systems such as Dropbox? Please explain why.

19. Do users within a department share documents and work items? (such as spreadsheet)

20. Do you share documents with other departments?

21. Do you share documents with *external groups* such as contractors or vendors?

22. Do you scan and store any paper documents currently?

23. If yes to scanning, what type of scanner(s), how are the documents named, and where are the documents sent to and saved? (dedicated scanners or multi-function devices)

24. If you have a file room, where paper documents are stored, and if so, do you plan to convert all the documents to electronic documents?

25. If you had one single goal for this project, what would it be?