



Forms and Document Types (please attached representative samples)
Fill out this form for each FORM or DOCUMENT TYPE you wish to process.

Form or Document Type name: _____

Description: _____

Circle the answer that best applies:

Is this an “internal” or “external” form? Note: You control the format of an internal form. You do not control the format of an external form. Internal External

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 Yes No

Are the documents single sided (simplex), double sided (duplex) or both? Simplex Duplex
Both

Are the documents single page or multi-page or both? Single Multi-page

If multi-page, is the first page a "control" page with "control" data? Yes No

If multi-page, approximately how many pages per document? <5 <10 <20 <50 >50

If single page, is there "control" data on each? (ex: Invoice #) Yes No

Is there data on the form/document type, that can be extracted, that “relates” to data that already exists? (for purposes of validation) Yes No

How many documents, per day, to process for this form/document type? <100 <200 <500
>500

How many documents (in total) could the repository contain for the number of years that you desire to retain this form/document type? <10,000 <50,000 <100,000 <500,000 <1,000,000
>1,000,000

What is the preferred method of document/page separation, if required? Note: separation is the ability of scanning a large number of pages and allowing the software to separate the pages into the respective documents.

barcode blank page OCR online physical page count other



What is the quality/type of documents? Circle all that apply

Printed by: Dot matrix laser fax

Type: Black and white Color Mixed

Size: Letter Legal A4 Tabloid (11 X 17)

Retrieval method for this form/document type: Full content management (all words): Yes No

Database search: Yes No How many "indexes" are required? <5 <10 <20 >20

Windows Navigation: (using friendly folders) Yes No

Method: Client Web-based

Processing requirements for this form/document type: Circle all that apply

Barcode Reading Zone OCR Full Page OCR Database Validation

Forms Recognition (template matching) Forms Registration (floating x-y, not fixed x-y)

Imprinting (watermarks, Bates Stamping) Automated, operator unattended processing

Manual Indexing Pull Down Lists OMR (optical marked recognition)

Image format captured (original): PDF Tif JPG Word Excel Others

Image format in Repository (final): PDF Tif JPG Word Excel Others

Security desired for this form/document type: No Security Windows Proprietary

Describe the "levels" of security required for this form/document type-

Workflow requirements for this form/document type: Circle all that apply

Not Applicable Sequential Approval Process Action Required Functionality

Group Broadcasting Notes or Annotations Email Alerts Collaboration Version Control

Finalizing



IT INTERSECTION
Solutions for Resellers



Auditing requirements of the form/document type: Circle all that apply

Not applicable	HIPAA compliance	Who/what/when
Export to Excel/TXT	by User/Group	by Document
From/Thru Date	by Document Type	Other