

Document Management Questionnaire

Company Name:	
Contact Person:	
State:	
Phone Number:	
Email:	


GENERAL QUESTIONS	
Number of Company Locations	
Number of employees and number that use your ERP system?	Total Employees: _____ Number of ERP Users: _____
Name any initiatives to reduce the amount of paper being used	
The amount of paper and/or electronic documents flowing through your business processes is...	<input type="checkbox"/> Increasing <input type="checkbox"/> Decreasing
Has storing paper and documents (including electronic documents) become increasingly expensive and/or is consuming an increasing amount of space?	
Department that consumes the most paper (or wrestles with the most documents - paper or electronic)	
Is document security an issue?	
How do you control access to sensitive documents?	
Do your documents require revision control?	
Is your Accounting Department centralized? If not, please offer details.	
Please state if ISO certified or identify any other certifications.	
How is information shared between employees in different locations and departments?	




Is your staff challenged with the volume of outbound emailing, faxing and printing?	
Would it be a benefit if employees could locate documents outside of your ERP system?	
How many different methods for managing and storing documents are your employees using? (Paper files, Outlook, Microsoft Office, network directories, personal files, etc.)	
Method to store/archive documents coming from other sources beyond your ERP system (e.g. scanned forms like Bills of Lading, emails, PDF attachments, Word and Excel documents, etc.)	
How well does your current system work?	
Do you currently have any kind of structured repository for documents? If so, please offer details.	
What kinds of documents are required for your sales orders?	
Is your customer service department armed with the tools to answer customer inquiries without leaving their desk?	
Is CAD Software used? If so, which?	
Is off-site storage or shredding services used?	
A good system, like DDX, can help you save money in a variety of areas, from floor space, to paper, to personnel time and much more. How much do you anticipate being able to save your company <i>annually</i> with a good document management system in place?	

In the below charts, please provide an estimate of how your company deals with documents. The “Filing system” column asks how you file your copies of these documents.

Outbound Documents

	<i>QTY per Month</i>	<i>% Emailed</i>	<i>% Faxed</i>	<i>% Mailed</i>	<i>Filing System?</i> 
Customer Invoices					
Order Acknowledgements					
Supplier P.O					
Other Documents					

Inbound Documents

	<i>QTY per Month</i>	<i>% Emailed</i>	<i>% Faxed</i>	<i>% Mailed</i>	<i>Filing System?</i> 
Supplier Invoices					
Customer P.O					
Customer Correspondence					
Other Documents					



THE DOCUMENT MANAGEMENT PEOPLE

Please list any other additional information you think we should know.

Please sign to verify all information above is correct.

_____ Date: _____

Thank You!

PLEASE RETURN TO DASH