

Virtual Doxx Digitization Services Questionnaire

CUSTOMER INFORMATION:

Account Name:	_____	Contact Name:	_____
Project Name:	_____	Billing Name:	_____
Street Address	_____	Contact Numbers:(ph/fx)	_____
City, State, Zip	_____		
Billing Address:	_____		

SCANNING REQUIREMENTS:

DPI Setting

Grayscale Images Required

Yes

No

Color Images Required

Yes

No

Percentage of documents with
backside? (Duplex)

Document Types

Singles

Multiples

Both

If both, can originals be separated to
S/M

Yes

No

SYSTEM INFORMATION:

Current / Anticipated Imaging System

Current/Anticipated Imaging System: _____

Indexing / Organization

How are the files currently organized? (e.g. manila or color coded folders, file pockets, file cabinets, open shelving, books)

How many of these units are there in total?

Is there more than one unique document within these units?

Yes No

If yes, please describe an average makeup of each unit. (e.g. number of docs, average number of sheets in each document, docs that are double sided, etc.)

How do you currently distinguish and identify each unit? (e.g. Name, SSN, Acct ID, Numeric, character string) Give an example.

Are there exceptions? Yes No
If yes, describe the identifying method for each exception

A data feed can be used to either validate index values and/or automatically populate some index values. When populating index values, a key index value is entered and corresponding index data can be populated from the data feed, eliminating the need for an operator to enter that data.

Do you currently have a data feed with records of each of these docs or units?
 Yes No

What is the Primary Key Field from DB _____

Does the data feed include values that are part of the index requirements that can be automatically populated? Yes No

What should the procedure be when we encounter documents with index values that do not appear in the data feed?

- Reject the document
 - Accept the document with a code indicating the
 - Accept the document with a code indicating the index values did not validate
 - Please specify
-

If the document is rejected because it doesn't exist in the data feed, what should the procedure then be?

- Pull document and try again when a new data feed is received
 - Stop processing and contact the customer
 - Provide a report to the customer
 - Pull the paper from box and return it to the customer
 - Other (please specify)
-

What frequency will the data feed be provided? _____

Will each new data feed replace or append to the previous file?

- Replace
- Append

How accurate is the database?

Once converted, documents will be retrieved using an index – a set of key Identifiers that tie the identifier to an image and recall the image. The index Should be created to facilitate your workflow process.

Some Options are:

Each sheet of paper is a standalone record – indexing by page

Sheets are organized into documents – indexing by document

Sheets are organized into documents, documents are organized into folders

Option1 – Index by folder and document

Option 2 – Index by folder visually search for document

DATA ENTRY INDEX FIELDS INFORMATION:

Folder Level:

Fields:

- | | |
|----------------------------|-----------------------------|
| 1. _____ #Keystrokes _____ | 6. _____ #Keystrokes _____ |
| 2. _____ #Keystrokes _____ | 7. _____ #Keystrokes _____ |
| 3. _____ #Keystrokes _____ | 8. _____ #Keystrokes _____ |
| 4. _____ #Keystrokes _____ | 9. _____ #Keystrokes _____ |
| 5. _____ #Keystrokes _____ | 10. _____ #Keystrokes _____ |

Document Level:

Fields:

- | | |
|----------------------------|-----------------------------|
| 1. _____ #Keystrokes _____ | 6. _____ #Keystrokes _____ |
| 2. _____ #Keystrokes _____ | 7. _____ #Keystrokes _____ |
| 3. _____ #Keystrokes _____ | 8. _____ #Keystrokes _____ |
| 4. _____ #Keystrokes _____ | 9. _____ #Keystrokes _____ |
| 5. _____ #Keystrokes _____ | 10. _____ #Keystrokes _____ |

Are index fields fixed length?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, should leading 0's be used in:	<input type="checkbox"/> Front	<input type="checkbox"/> Back

Comments:

Identify the Index to be Used

What are the rules for identifying the key fields on the paper?

Are they left or right justified? Right Left

Do you want the index verified? Yes No

Is multiple indexing required?* Yes No

* More than one of the same index values appear on one page

Please attach a data map indicating all requirements of your index

Data Output / Media Type Information

What image format will be used? (e.g. TIFF, PDF, etc.) _____

Do you require an output text file? (OCR "no" clean up) Yes No

Do you require full search capability from the image file? (e.g. PDF with Searchable Text)

Yes No

What is the delivery media:

CD/DVD/with specific output file structure

CD/DVD/RX

FTP

Data Repository

If CD/DVD with specific output file structure please identify

Are there duplicate CD's/DVD's required: Yes No If yes, how many

_____ If FTP, push or pull _____

If push, what is ftp address: _____

Should a back-up copy of the images be produced? Yes No

If yes, what type of media should be used? _____

Electronic Data Retention Requirements:

How long should the electronic data be maintained? _____

Original Document Retention Requirements:

Do the original file documents get stored, returned, or destroyed? Please explain your requirements in detail. _____