Tech Data® CORPORATION

Imaging and Document Management Dept.
(800) 237-8931 ext. 7745

Fax (813) 538-5899

IDM System Configuration Questionnaire

Tech Data Customer Number:_____

1. Present document management system: paper, microform or electronic (circle)?

2. Current problems with document filing system?

_____

_____

_____

3. How long does it take to find needed information using current filing system?
   ❑ < 30 min.   ❑ 30 min to 1hr.   ❑ 1 to 4 hrs.   ❑ >4 hours.

4. What type of software applications need to be integrated intothe imaging and document management system?

   ❑ Email.   ❑Data Base.   ❑Word Processing.   Other _____.
5. Will Images need to be stored on a WORM drive?   Yes.   No.
   [depending on legality, please check your state laws]

6. Total number of users that have high volume retrieval needs? _____.

7. Total number of other users that need periodic access? _____.

8. Please describe the current workstation configurations in place including hardware and software.

_____

_____

_____

_____

_____

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9. Describe the current operating systems and hardware that will be part of the imaging configuration.

Netware ____   Mainframe _____

      Version____   OS _____

      Users____   Users _____

Microsoft NT___   Unix___

      Version___   Brand___

      Users___   Version___

OS/2____   Users___

      Version____

      Users___

10. Describe the current network. [how many layouts/segments, bridges/routers, WAN connections or remote users.]

_____

_____

_____

_____

11. What is the company's future direction in regards to upgrading systems and platform?

_____

12. How much does the customer have budgeted for this imaging configuration? $_____ .

13. What is the approximate installation date for this system? _____.

14. Please complete one worksheet for each document type to be used in the imaging system.

E x a m p l e

Tech Data Customer Number:_____

Document Properties

Type	*Invoice*
Pages Per Document	*1*
Size	*8.5" x 11"*
Single/Double Sided	*Single*
Paper Type/Quality	*original/good*
Total Life Span	*5 years*
Period Most Active	*first 90 days*
Level of Security	*medium - accessible to Accounts Receivable & Customer service.*

Input Information

Avg. Scanned/Day	*500*
Max. Scanned/Day	*1000*
Scanned Resolution	*200 dpi*
Scanned in Color?	*NO*
Number of old files that need to be converted.	*50,000*
Amount of time to convert old files.	*6 months*
Do Image files need to be transported to a different location?	*NO*

Processing Information

Avg. Viewed/Day	*100*
Max. Viewed/Day	*300*
Avg. Faxed/Day	*50*
Max. Faxed/Day	*100*
Avg. Printed/Day	*25*
Max. Printed/Day	*100*
Avg. Emailed/Day	*75*
Max. Emailed/Day	*125*

Index Information

Index 1	*Invoice Number*
Max Characters	*8*
Index 2	*Customer Number*
Max Characters	*7*
Index 3	*Customer Name*
Max Characters	*20*
Index 4	*Date*
Max Characters	*8*
Index 5	
Max Characters	
Index 6	
Max Characters	

Last Update: 2/27/96

Document Imaging Worksheet

(Please Complete One Worksheet for each document type.)

Tech Data Customer Number:_____

Document Properties

Type	_____
Pages Per Document	_____
Size	_____
Single/Double Sided	_____
Paper Type/Quality	_____
Total Life Span	_____
Period Most Active	_____
Level of Security	_____

Input Information

Avg. Scanned/Day	_____
Max. Scanned/Day	_____
Scanned Resolution	_____
Scanned in Color?	_____
Number of old files that need to be converted.	_____
Amount of time to convert old files.	_____
Do Image files need to be transported to a different location?	_____

Processing Information

Avg. Viewed/Day	_____
Max. Viewed/Day	_____
Avg. Faxed/Day	_____
Max. Faxed/Day	_____
Avg. Printed/Day	_____
Max. Printed/Day	_____
Avg. Emailed/Day	_____
Max. Emailed/Day	_____

Index Information

Index 1	_____
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Index 5	_____
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Index 6	_____
Max Characters	_____

Cost Savings Review

While no one can accurately determine what the use of electronic document imaging could save your organization, a quick analysis can be made, the United States Bureau of Labor Statistics has estimated that about 80 percent of an office worker's time is spent *handling paper.*

Enter Number of employees in your organization who are mainly engaged in working with paper (processing, routing, data entry, customer service, faxing, filing, etc.)	>	
Enter and Multiply by Monthly Labor Costs (Including benefits per person).	**x**	
Total amount Spent on Paper-Handling per Month	=	
Divide by 2 (We are presuming that 50% of their time is spent finding and filing documents).	/	2
Total Paper Handling Costs per Month	=	
Subtract Cost of Imaging System per Month	-	
Total potential monthly savings of imaging system as an alternative to handling paper	=	
Multiply by 12 months	**x**	12
Total Annual Cost Savings of Imaging System	=	