



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



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

Please visit <http://support.vircosoft.com> and create a new ticket under Pre-Sales Support

Then upload this document.

Thank you.