



WHITE PAPER

DOCUMENT MANAGEMENT FEATURES & FUNCTIONS CHECKLIST

DOCUMENT MANAGEMENT FEATURES & FUNCTIONS CHECKLIST

Document Management Checklist	Satisfies Requirement	Included/Optional	Findings
Hardware			
Virtual server support			
Terminal server support			
MFP device support (push/pull scanning) Which devices are supported?			
Minimum server requirements			
Database back-end			
Web application			
Repository			
Supported scanners for network and desktop			
Network			
WAN support (remote locations accessing product)			
HTTPS or SSL support for public facing systems			
Software			
Batch scanning capability (e.g. scan all invoices for Nov)			
Barcode technology supported <ul style="list-style-type: none"> • Full Page OCR recognition • Zonal recognition • Support patch code separators 			
Mobile Application available for remote capture			
Mobile support for remote document search/ retrieval			
Connect to ODBC connections and Web services for automatic indexing from key line of business systems			
Dynamic cross linking			
Ability to link documents from other business units together (e.g. invoice to check to PO)			

Document Management Checklist	Satisfies Requirement	Included/Optional	Findings
Electronic forms (eForms)			
Viewer must support eForms (Adobe vs ASP/HTML vs Office) natively			
Ability to set retention periods			
Must support annotation and redaction functionality within viewer (not just print or e-mail)			
Browser based shared workspace			
Granular audit trail-must capture all changes to system and views of records			
Audit reports available for printing or exporting			
Automatic metadata collection and indexing			
Ability to store all media (audio, video, image, etc)			
Licensing			
Per named or concurrent user			
Maintenance requirements (includes upgrades)			
Patch/Updates management			
Modules (different licensing requirements?)			
Training	Satisfies Requirement	Included/Optional	Findings
Vendor (on site vs web)			
Computer Based Training available?			
Implementation documentation provided			
Troubleshooting guide			
User manuals			
Admin manuals			
Support			
VM/TS support as it applies to vendor application			
Levels of support			
MFP support as it applies to vendor supported devices			
Integration	Satisfies Requirement	Included/Optional	Findings
SharePoint			
Lawson			
Great Plains			
Meditech			
Epic			
PeopleSoft			
MRP			