

CFSP Content Outline

CFSP Study Area

Focus Points

I. Process / Workflow Analysis

A. Assessment of Objectives and Project Scope

B. Fact Finding

1. Questions

2. Methods

3. Basic Functions of Business

C. Data Organization

1. Process Charting / Mapping

2. Recurring Data Analysis

3. Pareto Analysis

4. Other

D. Analysis

1. Questions

2. Methods

E. Solution Development

F. Recommendations

1. Proposal Preparation

2. Presentation

G. Implementation

1. Implementation Plan

2. Installation

3. Documentation

4. Training

H. Follow-up and Evaluation

II. Design and Development

A. Design Elements

1. Graphics

2. Use of Color

3. Typography

B. Plain Language

C. Graphical User Interface (GUI)

D. Techniques

1. General Layout Principles

a. Zoning

b. Balance

c. Presentation Style

d. Spacing

e. Paper and Electronic Integration

f. Postal Considerations

g. Record and Data Retention Considerations

h. Testing and Review

2. Paper Specifics

a. Caption Placement

b. Manufacturing Considerations

c. Information Suppression

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d. Printing Specifications

e. Other

3. Electronic Specifics

a. Interface Design

1. Field Help

2. Masks

3. Selection Methods

4. Field Formatting

5. Interface Formatting

6. Menu Planning

7. Ribbons and Action Buttons

8. Information Suppression

9. Development Specifications

10. Other

b. Application Development

1. Tabbing Order

2. Compulsory Fields

3. Data Validation

4. Database Administration

5. Security

6. Routing and Tracking

7. Decision-Tree Matrices

8. Macros and Scripting

9. Application Integration

10. Other

III. Manufacturing and Technology Principles

A. Forms Manufacturing

1. Products

2. Materials

3. Methods

a. Pre-press

b. Press

c. Bindery

d. Post Processing

B. Electronic Technologies

1. Digital Demand Imaging

2. Recognition Systems

a. MICR

b. OCR

c. OMR

d. Bar Codes

e. Other

3. Post Processing

4. Data Merge Printing

C. Systems Architecture

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	<ol style="list-style-type: none">1. Hardware<ol style="list-style-type: none">a. Hostb. Serverc. Clientd. Printerse. Peripherals2. Operating Systems3. Networks4. Communications Systems5. Application Software<ol style="list-style-type: none">a. Imaging Systemsb. Forms Compositionc. Forms Automationd. Messaging<ol style="list-style-type: none">1. Vendor Independent Messaging (VIM)2. Messaging Application Programming3. Messaging Handling Systems (MHS)e. Database<ol style="list-style-type: none">1. Open Database Connectivity (ODBC)2. Structured Query Language (SQL)f. GroupWareg. Workflowh. Electronic Commercei. Security and Encryptionj. Multimediak. Document Management Systems (DMS)6. Standards
IV. Forms Management	
A. Work Skills	<ol style="list-style-type: none">1. Cost Benefit Analysis2. Consultation3. Work Group Development4. Customer Service Techniques5. Scheduling and Prioritizing6. Ethics7. Interviewing8. Training9. Negotiating10. Presentations11. Project Management12. Environmental and Safety Awareness
B. Administration	<ol style="list-style-type: none">1. Version Control2. Identification Systems3. Filing Systems

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	4. Security Issues
	5. Warehousing and Distribution
	6. Management Reports
	7. Standards
	8. Tracking
	9. Operational Procedures
	10. Records and Data Retention
	11. Obsolescence
	12. General Record Keeping
	13. Forms Libraries
	14. Other
C. Procurement	
	1. Supplier Relationships
	2. Product Evaluation
	3. Quotations and Proposals
	4. Contract Negotiating
	5. Trade Customs
D. Inventory Management	
	1. Automated Systems
	a. Barcoding
	b. Just In Time (JIT)
	c. Freight Optimization
	d. Other
	2. Forms Fulfillment
	3. Print-on-Demand
	4. Receiving
	5. Inventory Control
	6. Shipping