

UNDERSTANDING FORMS: A Complete Guide for Design and Management

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INTRODUCTION to FORMS

- Definitions
- Four Elements of Every Form
- Forms Management Principles
- Information Resources

Four Elements of Every Form – INTENT

- Ten Basic Functions of Business
- Primary Business Systems
- Secondary Business Systems
- Workflow Analysis
- Project Management Tools
- Flowcharting
- Business Rules
- Selecting the Best Alternatives
- Cost Analysis and ROI
- Security Requirements
- Signature Requirements
- Notification & Copy Distribution
- Miscellaneous Requirements
- INTENT Links

Four Elements of Every Form – CONTAINER

- Definition and Purpose
- Design Analysis
- Form Types / Product Types
- Production Considerations
- Print Technologies
- Manufacturing Considerations
- Browsers
- Networks
- Servers
- Fillers
- Multiple Pages, Drawing Techniques
- New Technologies

Four Elements of Every Form – DATA

- Data vs. Information
- Sources of Data
- Collection and Display
- OCR, OMR, IMR, ICR and Data Formats
- Data Types
 - Oracle; MS Access
 - Masks
 - Restrictions and Qualifiers
 - Fonts: Standards, Uses, Misuse
- Bar Codes
- MICR
- Current Check Printing Methods

- Security Issues
- Security Techniques
- Security Features
- Databases
 - Database Types
 - Relational Databases
 - Important Terms
 - Open DataBase Connectivity (ODBC)
 - Database Use for Electronic Forms
 - Databases and Internet Forms
 - Common Gateway Interface
 - Database Management
 - Fields, Field Types, Calculations
 - Using Excel, VB Script, JavaScript, Calculation Wizards
 - Spell Checking, Error Detection and Correction
 - Scanning / Imaging Requirements
 - Extensible Markup Language (XML)
- Paper, Electronic and Internet Systems
- Data Collection and Storage
- Data Integrity
- DATA Links

Four Elements of Every Form – IMAGE

- User Interfaces
- Dealing with Users
- Corporate Image
- Section 508 Requirements
- Cost and Cost Management

FORMS MANAGEMENT

- An Overview of the Elements
- Program Establishment
- Process Analysis
- Forms Control Techniques
- Form File Structure
- Database Contents and Functions
- Formats and Media Types
 - Paper
 - Electronic
 - Internet
- Media / Specification Definitions
 - Similarities
 - Differences
 - Selection Criteria
- Procurement
- Roles

PUTTING IT ALL TOGETHER