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

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