# LIFE CYCLE OF A FORM

INFORMATIONAL ARTICLE

# THE DEVELOPMENT/LIFE CYCLE OF A FORM

## Authorship:
**Form Action Request**

This is the very first phase in creating a new business form. It is the acknowledgment that a form may be needed and then the decision and request to develop one. Hopefully the "author" will conduct some analysis of what they need and want, and then prepare a list of data elements, or better yet, draw a pencil draft. The requester should document their needs, either by a purchase order from a vendor, or an internal printing request. This documentation will guide the requester in examining their needs and time frames and will help them develop an initial plan of action. An internal requisition is especially valuable because it can point out issues that are of particular importance or peculiarity to the business and its forms management program. The more definite and complete the requirements and specifications, and the sooner they are established and documented, the sooner the product (form) will be available for use.

## Analysis:
The analysis is the second phase of a form's life cycle. It is the natural continuation of establishing and confirming systems requirements and specifications (methods analysis). Study the who, how, what, where, when, and why of all the processing steps. What other forms and systems interface with this form system and how do they affect each other? Whether it is a new form or a revision to an existing form, research every aspect of the form and its system. What are its key usage characteristics, and what equipment is used? If the system is complicated, a more in-depth analysis is required. A thorough workflow analysis will confirm that all of the processing steps are necessary and are performed by the right people at the right time. This, in turn, helps ensure that any forms used will meet the needs of the system and users.

## Design:
Design is the third phase of a form's life cycle. Forms Design is more than just drafting. It is the step-by-step process of taking all the findings of your analysis, merging them with all the required data elements, and putting it all into a graphic plan (while using all the applicable theories of good forms design). It is here that we put design theories and elements into practice. Just as forms systems analysis has a structured methodology, so too does the design and layout. Every element and word and the way it is graphically presented should have a deliberate rationale and purpose.

## Composition (for printed forms only):
Composition is the fourth phase of a form's life cycle. After the form is analyzed and designed, camera-ready artwork must be prepared. Composition is an art form. It includes choosing the appropriate type styles and sizes (called "typography") and then using typesetting equipment or composition and drafting equipment and supplies to produce the artwork. This artwork will be used by the printing manufacturer to make a negative and then a plate (image carrier) for use in producing the final forms. Another aspect of composition is the proofing process. This begins with the completion of a design approval form (called a “proof”) and forwarding it along with a copy of the form to the author/requester.

## Order Entry and Manufacturing (for printed forms only):
This is the fifth phase of a form's life cycle.

### Order Entry (1)
This includes taking information obtained from the requester on their forms requisition, adding it to other information obtained from the analysis phase, and writing the order, material, and construction specifications on some kind of purchase order. It is critical that these specifications are complete, exact, and easy to understand. The purchase order also serves to authorize the expenditure of money.

**Manufacturing** (2)
The printing vendor will take the purchase order and use the written specifications to order or reserve materials and supplies, compose artwork as needed, and schedule time and equipment for each step of the manufacturing process. The vendor may also send a proof to the ordering agency to confirm construction specifications, especially if the final product is expensive or complicated.

**Storage and Distribution (for printed forms only)**:
This is the sixth phase of a form's life cycle. Storage and distribution can be provided by the manufacturer, a warehousing/distribution service agency, or by your own, in-house warehouse/stockroom.

Storage and distribution costs money, regardless of who does it. Efficient and timely storage and distribution are as important as any other phase of forms development. If a stockout occurs, if forms are destroyed by poor storage facilities, if too much money is invested in inventory, or if the distribution is slow and inefficient, the objective of providing a good forms management program is lost. The bottom line of developing and producing efficient forms is their actual usage. So, make sure that they are available for use when needed.

**Use:**
This is the seventh phase of a form's life cycle. It is the entry of information on the form by hand or machine, the actual use of the form as a tool of communication. This is the phase where any systems logic or forms design or construction efficiencies (and deficiencies) become obvious. The users should note any problems that occur while using the form. Then the next time the form needs revising or the stock needs replenishing, these problems can be resolved by redesign or construction alterations. This feedback is necessary so that the form can evolve with the system and continue to be an efficient tool of communication.

**Reprint, Revise, or Obsolete:**
This is the eighth and last phase of a form's life cycle. Eventually, every form will need to be reprinted, revised, or obsoleted. With each of these actions, the decision and notification to begin them are both the prerogative and responsibility of the user/requester/owner of the form.

**Reprint.** This is simply the act of ordering a stock replenishment supply of the exact edition that was previously ordered. With an exact reprint, the form's life cycle picks up at the fifth phase (order entry and manufacturing) and continues as usual.

**Revise.** Whenever a business information system changes, the processing methods used, and the people and forms involved will almost always be affected in some way. Form revisions can be a simple "tune-up" or modification, or it can be a major, extensive change. Revising a form will follow the same development steps as a new form; from authorship, through analysis, design, composition, ordering, manufacturing, storage, and distribution, to use, and eventually, another decision to reprint, revise, or obsolete.

**Obsolescence.** For the same reasons of change and evolution, a form can someday be no longer needed and is thus considered obsolete. A form can become obsolete for several reasons: Forms combinations, systems combinations, systems changes, systems obsolescence, or a decision to change the communication medium (e.g.: paper to electronic).

Upon making a form outright obsolete, its life cycle ends. An obsolescence is complete; it is **NOT** a revision that makes previous editions obsolete.