

# Forms Analysis and Design Course

## Purpose

This five-day course provides training in a broad range of analysis and design topics for both paper and electronic forms. The course highlights the more important issues that the analyst has to deal with in designing cost-effective forms that are easy for people to use.

## Who should attend

This course is suitable for anyone involved in the design of business forms. While it is comprehensive and of particular benefit for the professional forms or business systems analyst, no prior knowledge of forms is required.

## Trainer

The course will be conducted by Rob Barnett who has had over 38 years experience in business systems analysis and form design. In 1998 he received the prestigious Jo Warner Award from the Business Forms Management Association in the USA for his contribution to the forms profession.

## What you receive

All participants receive a copy of the textbook "*Forms For People: Designing forms that people can use*", a set of summary notes and all course materials. Lunch and refreshments are supplied each day

Form Design	Forms Analysis	Human Factors	Special Forms Needs	Production
<p><b>Basic principles</b></p> <ul style="list-style-type: none"><li>Types of forms</li><li>Problems people have with forms</li></ul> <p><b>Forms typography</b></p> <ul style="list-style-type: none"><li>Role of type in form design</li><li>Type measurement</li><li>PostScript, TrueType &amp; OpenType</li><li>Typographic terms</li><li>Choosing the right type</li></ul> <p><b>Basic form graphics</b></p> <ul style="list-style-type: none"><li>Types of answer space</li><li>Lines and boxes</li><li>Ballot (tick) boxes</li><li>Optical reading devices</li></ul> <p><b>Colour</b></p> <ul style="list-style-type: none"><li>How we "see" colour</li><li>Practical uses of colour</li><li>Colour and fax forms</li><li>Specifying colour</li><li>Colour matching</li><li>Shading — uses, methods and specifications</li></ul> <p><b>Building the form</b></p> <ul style="list-style-type: none"><li>Systematic approach</li><li>Layout components</li><li>Types of layout</li><li>Giving instructions</li></ul>	<p><b>Basic principles</b></p> <ul style="list-style-type: none"><li>Where designers fail in producing quality forms</li><li>The need for analysis</li><li>What to analyse</li><li>Sources of information</li><li>Teamwork</li></ul> <p><b>Data gathering</b></p> <ul style="list-style-type: none"><li>Sources of information</li><li>Written surveys</li><li>Interviewing</li><li>Focus and discussion groups</li></ul> <p><b>Aids to forms analysis</b></p> <ul style="list-style-type: none"><li>Forms history</li><li>Error analysis</li><li>Documented procedures</li><li>Flow charting techniques for forms work</li><li>Useability testing</li></ul>	<p><b>Forms language</b></p> <ul style="list-style-type: none"><li>Defining communication</li><li>Forms as a means of dialog</li><li>Role of graphics</li><li>Forms grammar</li><li>Effective use of words</li></ul> <p><b>Asking questions</b></p> <ul style="list-style-type: none"><li>Guiding the user</li><li>Dealing with form-filling habits</li><li>Yes / No questions</li><li>Getting people to follow instructions</li></ul> <p><b>Psychological issues</b></p> <ul style="list-style-type: none"><li>How design impacts users</li><li>Perception</li><li>Sensitive issues</li><li>Special needs of aged people</li></ul>	<p><b>Introduction to electronic forms</b></p> <ul style="list-style-type: none"><li>What are "electronic forms"?</li><li>E-forms and productivity</li><li>Key features and benefits</li></ul> <p><b>Special types of forms</b></p> <ul style="list-style-type: none"><li>Computer input forms – manual entry</li><li>Computer input forms – machine readable<ul style="list-style-type: none"><li>- OCR</li><li>- OMR</li><li>- HCR</li><li>- MICR</li></ul></li></ul>	<p><b>Paper for forms</b></p> <ul style="list-style-type: none"><li>Terminology</li><li>Measuring paper</li><li>Selecting the appropriate type of paper</li></ul> <p><b>Construction</b></p> <ul style="list-style-type: none"><li>Methods of construction</li></ul> <p><b>Multipart forms</b></p> <ul style="list-style-type: none"><li>History</li><li>Construction issues</li><li>Carbon paper versus carbonless paper</li><li>Mailers</li></ul> <p><b>Pre-press</b></p> <ul style="list-style-type: none"><li>Getting the form printed</li><li>Configuring computer files</li><li>Using PDF</li><li>Form specifications</li><li>Configuring computer files</li><li>Proof checking</li><li>Checking the finished job</li></ul>

## CASE STUDY WORKSHOPS EACH DAY