



Chapter 5 of our book *Managing Business Forms* includes tables of typical selection criteria for each position, diagrams of possible department structures and general background notes on setting up a department.

We also have a FREE background paper which gives an overview of forms management: *Making a Forms Management Program Work*.

Typical position descriptions

The following position descriptions and titles are given as a guide only. You would most likely need to modify them to suit your organisation's needs. While this section describes the typical positions found in a Forms Management Department, later in the chapter you will find tables summarising how to select suitable staff. Since this is a book of forms management, I have titled the positions to reflect that need. However, in many organisations, it would be more appropriate to describe the positions with reference to information design.

While the lowest position given is that of a 'trainee', its use doesn't mean that this person knows little or nothing about business. I strongly believe that the person starting in forms or information design should have a good background in general business activity. Even when the person has a tertiary qualification in communication or information design, this business experience is still important.

For the purpose of these notes, 'electronic forms' refers to programmed non-paper forms which are sent electronically from one person to another.

The following Forms Management positions are described in this document

- Trainee Forms Analyst (Level 1 - entry level)
- Assistant Forms Analyst (Level 2 - minimum level of competency)
- Forms Analyst (Level 3 - forms specialist)
- Senior Forms Analyst (Level 4 - expert forms analyst)
- Team/Project Leader (Level 5 - paper documents)
- Team/Project Leader (Level 6 - paper and electronic documents)
- Team/Project Leader (Level 7 - paper and automated forms systems)
- Forms Manager (Level 8)

Trainee Forms Analyst (Level 1 - entry level)

GENERAL BUSINESS ACTIVITIES

- Assists with information and data collection.
- Provides input to information and form design.
- Designs simple one colour paper forms under supervision.
- Writes basic business letters and internal correspondence.

DECISION MAKING AND PROBLEM SOLVING

- Assists in determining solutions to problems.

PLANNING

- Assists more senior positions with planning work targets and setting priorities.
- Assists more senior positions with document testing plans.

GUIDANCE TO OTHERS

- Provides guidance to users under supervision.

IMPLEMENTATION AND TRAINING

- Assists more senior positions under supervision.

COMPUTER USE

- Uses computer-aided design and word processing software under supervision.

Assistant Forms Analyst (Level 2 - minimum level of competency)

GENERAL BUSINESS ACTIVITIES

- Collects and processes data.
- Analyses data to determine information design needs.
- Assists with work flow analysis for forms automation.
- Designs simple one colour paper forms.
- Designs the following under supervision: - simple multicolour paper forms - simple multipart paper forms - simple computer input paper forms - simple continuous computer output forms - simple laser printer forms
- Assists with document testing under supervision.
- Assists more senior positions in writing printing specifications.
- Liaises with suppliers and procurement staff on simple printing jobs.
- Keeps documentation up to date.
- Writes basic business letters and internal correspondence.

DECISION MAKING AND PROBLEM SOLVING

- From previously acquired background knowledge, assists with conceptual thinking and problem solving.
- Determines solutions to information needs problems.
- Analyses specific guidelines, concepts and procedures using own initiative.

PLANNING

- Assists with planning work targets, scheduling work and setting priorities.
- Provides detailed input to plans.
- Assists with planning of document testing.
- Assists with the development of information needs cases for users.

GUIDANCE TO OTHERS

- Supports more senior analysts in providing guidance to users.
- Answers basic enquiries from user areas.

IMPLEMENTATION AND TRAINING

- Assists with planning and training of users.
- Prepares sections of user manuals under guidance.

COMPUTER USE

- Uses computer-aided design and word processing software.

Forms Analyst (level 3 - forms specialist)

GENERAL BUSINESS ACTIVITIES

- Collects and processes data.
- Analyses data, information needs and user requirements.
- Analyses work flow for forms automation.
- Assists with user negotiation on work flow and information design.
- Designs simple paper forms for a small system.
- Assists in the design of simple paper forms for a complex system.
- Designs complex paper forms under supervision.
- Designs electronic forms under supervision.
- Designs language for internal forms and basic public-use forms.
- Carries out testing of individual documents.
- Carries out error analysis studies under supervision.
- Writes printing specifications.
- Liaises with suppliers and procurement staff.
- Keeps documentation up to date.
- Writes business letters and internal correspondence.

COMPUTER USE

- Uses computer-aided design, word processing and project planning software.
- Uses electronic forms software under supervision.
- Installs software and system upgrades.

DECISION MAKING AND PROBLEM SOLVING

- Provides conceptual thinking and problem solving skills.
- Analyses facts, issues and situations not previous encountered to provide solutions to information needs problems.
- Analyses specific guidelines, concepts and procedures using own initiative.
- Determines solutions to basic work flow and electronic document problems.
- Provides guidance to levels 1 and 2 to ensure objectives are met.

PLANNING

- Plans work targets, schedules work and sets priorities.
- Does detailed planning.
- Carries out sizing and estimating tasks.
- Prepares document testing of individual documents.
- Assists in planning error analysis studies.
- Assists in setting realistic and achievable work loads for lower levels.
- Develops information needs cases for users.
- Assists with project planning and identifies project risks.

GUIDANCE TO OTHERS

- Supports more senior analysts in providing guidance to users.
- Answers enquiries from user areas about language and information design.
- Negotiates change with users.
- Provides guidance and direction to levels 1 and 2.
- Reviews document test results of lower levels.
- Quality assures work of lower levels.

IMPLEMENTATION AND TRAINING

- Prepares and delivers end user training in single document usage.
- Assists with end user training in electronic forms.
- Assists with post implementation reviews of individual documents.
- Prepares sections of user manuals in conjunction with business systems analysts.

Senior Forms Analyst (Level 4 - Expert forms analyst)

GENERAL BUSINESS ACTIVITIES

- Collects and processes data.
- Analyses data, information needs and user requirements.
- Analyses work flow for forms automation.
- Makes recommendations to users on work flow and information design.
- Designs simple and complex paper forms for any system.
- Designs electronic forms under supervision.
- Designs language for public-use forms and other documents.
- Carries out document testing.
- Carries out error analysis studies on individual documents and small projects.
- Writes printing specifications.
- Liaises with suppliers and procurement staff.
- Keeps documentation up to date.
- Writes business letters and internal correspondence.

COMPUTER USE

- Uses computer-aided design, word processing and project planning software.
- Uses electronic forms software.
- Installs software and system upgrades.

DECISION MAKING AND PROBLEM SOLVING

- Provides conceptual thinking and problem solving skills.
- Analyses facts, issues and situations where there is little or no precedent to provide solutions to information needs problems.
- Analyses specific guidelines, concepts and procedures using own initiative.
- Determines solutions to complex work flow and electronic document problems.
- Identifies and monitors project risks.

PLANNING

- Plans work targets, schedules work and sets priorities.
- Completes detailed planning for major projects.
- Carries out sizing and estimating tasks.
- Prepares document testing.
- Overviews document test plans and results of individual documents.
- Plans error analysis studies on individual documents and small projects.
- Assists in setting realistic and achievable work loads for lower levels.
- Develops complex information needs cases for users.

GUIDANCE TO OTHERS

- Assists team leaders, project managers or supervisors.
- Advises and consults user areas on language, information design and work flow.
- Negotiates change with users.
- Provides guidance to lower levels and acts as a mentor.
- Provides guidance to levels 1 and 2 to ensure objectives are met.
- Quality assures work of major information design projects.

IMPLEMENTATION AND TRAINING

- Prepares and delivers end user training for single document usage.
- Prepares and delivers end user training for single electronic forms.
- Oversees end-user training for multi-document projects.
- Assists with end-user training in automated forms systems (systems using multiple electronic forms).
- Carries out post implementation reviews of individual documents.
- Assists with post implementation reviews of multiple document projects.
- Prepares sections of user manuals in conjunction with business systems analysts.

Team/Project Leader (Level 5 - paper documents)

GENERAL BUSINESS ACTIVITIES

- Collects and processes data.
- Analyses data, information needs and user requirements.
- Analyses work flow for forms automation.
- Acts as consultant to users on information design and work flow.
- Designs simple and complex paper forms for any system.
- Designs electronic forms under supervision.
- Designs language for public-use forms and other documents.
- Carries out document testing for small projects.
- Carries out error analysis studies on individual documents and small projects.
- Writes printing specifications.
- Liaises with suppliers and procurement staff.
- Keeps documentation up to date.
- Writes business letters and internal correspondence.
- Writes reports.

COMPUTER USE

- Uses computer-aided design, word processing and project planning software.
- Installs software and system upgrades.
- Monitors quality of printers and other computer peripherals.
- Advises on purchase of hardware and software.

DECISION MAKING AND PROBLEM SOLVING

- Provides conceptual thinking and problem solving skills.
- Analyses facts, issues and situations where there is little or no precedent to provide solutions to information needs problems.
- Analyses specific guidelines, concepts and procedures using own initiative.
- Determines solutions to complex work flow and electronic document problems.
- Identifies and monitors project risks.

PLANNING

- Plans team work load and sets priorities to ensure targets are met within time constraints.
- Completes and monitors detailed planning for major paper-based projects.
- Carries out sizing and estimating tasks.
- Prepares document testing for small projects.
- Plans error analysis studies on individual documents and small projects.
- Advises on training needs of team members.

GUIDANCE TO OTHERS

- Controls work of analysts at all levels in connection with paper documents.
- Acts as consultant to user areas on language, information design and work flow.
- Acts as a mentor for all analysts.
- Recommends revisions to forms and document design standards.
- Overviews document test plans and results for individual documents.
- Overviews information needs case development.
- Provides guidance to levels 1 to 4 to ensure objectives are met.
- Quality assures work of major information design projects.

IMPLEMENTATION AND TRAINING

- Prepares and delivers end user training for document usage.
- Oversees end-user training for large multi-document projects.
- Carries out post implementation reviews of multiple document projects.
- Prepares sections of user manuals in conjunction with business systems analysts.

Team/Project Leader (Level 6 - paper & electronic documents)

GENERAL BUSINESS ACTIVITIES

- Collects and processes data.
- Analyses data, information needs and user requirements.
- Analyses work flow for forms automation.
- Designs simple and complex paper forms for any system.
- Designs electronic forms under supervision.
- Designs language for public-use forms and other documents.
- Carries out document testing for small projects.
- Carries out error analysis studies on individual documents and small projects.
- Writes printing specifications.
- Writes specifications for individual electronic forms and small automated forms systems.
- Liaises with suppliers and procurement staff.
- Keeps documentation up to date.
- Writes business letters and internal correspondence.
- Writes reports.

COMPUTER USE

- Uses computer-aided design, word processing and project planning software.
- Installs software and system upgrades.
- Monitors quality of printers and other computer peripherals.
- Advises on purchase of hardware and software.

DECISION MAKING AND PROBLEM SOLVING

- Provides conceptual thinking and problem solving skills.
- Analyses facts, issues and situations where there is little or no precedent to provide solutions to information needs problems.
- Analyses specific guidelines, concepts and procedures using own initiative.
- Determines solutions to complex work flow and electronic document problems.
- Identifies and monitors project risks.

PLANNING

- Plans team work load and sets priorities to ensure targets are met within time constraints.
- Completes and monitors detailed planning for major paper-based projects and small automated forms projects.
- Carries out sizing and estimating tasks.
- Prepares document testing for small projects.
- Plans error analysis studies on individual documents and small projects.
- Overviews information needs case development.
- Advises on training needs of team members.

GUIDANCE TO OTHERS

- Acts as consultant to users on information design and work flow.
- Quality assures work of major information design projects.
- Provides guidance to levels 1 to 4 to ensure objectives are met.
- Overviews document test plans and results for individual documents.
- Controls work of analysts at all levels in connection with paper documents, individual electronic forms and small automated forms systems.
- Acts as consultant to user areas on language, information design and work flow.
- Acts as a mentor for all analysts.
- Recommends revisions to forms and document design standards.

IMPLEMENTATION AND TRAINING

- Prepares and delivers end user training in manual and electronic document usage.
- Oversees end-user training for large multi-document projects and small automated forms projects.
- Carries out post implementation reviews of multiple document projects and small automated forms projects.
- Prepares sections of user manuals in conjunction with business systems analysts.

Team/Project Leader (Level 7 - paper & automated forms systems)

GENERAL BUSINESS ACTIVITIES

- Collects and processes data.
- Analyses data, information needs and user requirements.
- Analyses work flow for forms automation.
- Acts as consultant to users on information design and work flow.
- Designs simple and complex paper forms for any system.
- Designs electronic forms under supervision.
- Designs language for public-use forms and other documents.
- Carries out document testing for small projects.
- Carries out error analysis studies on individual documents and major projects.
- Writes printing specifications.
- Writes specifications for individual electronic forms and electronic forms systems.
- Liaises with suppliers and procurement staff.
- Keeps documentation up to date.
- Writes business letters and internal correspondence.
- Writes reports.

COMPUTER USE

- Uses computer-aided design, word processing and project planning software.
- Installs software and system upgrades.
- Monitors quality of printers and other computer peripherals.
- Advises on purchase of hardware and software.

DECISION MAKING AND PROBLEM SOLVING

- Provides conceptual thinking and problem solving skills.
- Analyses facts, issues and situations where there is little or no precedent to provide solutions to information needs problems.
- Analyses specific guidelines, concepts and procedures using own initiative.
- Determines solutions to complex work flow and electronic document problems.
- Identifies and monitors project risks.

PLANNING

- Plans team work load and sets priorities to ensure targets are met within time constraints.
- Completes and monitors detailed planning for major paper-based and automated forms projects.
- Carries out sizing and estimating tasks.
- Prepares document testing for small projects.
- Plans error analysis studies on individual documents and major projects.
- Develops information needs cases.
- Advises on training needs of team members.

GUIDANCE TO OTHERS

- Controls work of analysts at all levels in connection with paper documents, individual electronic forms and large automated forms systems.
- Acts as consultant to user areas on language, information design and work flow.
- Acts as a mentor for all analysts.
- Recommends revisions to forms and document design standards.
- Overviews document test plans and results for individual documents and small projects.
- Provides guidance to levels 1 to 4 to ensure objectives are met.
- Quality assures work of major information design projects.

IMPLEMENTATION AND TRAINING

- Prepares and delivers end user training in manual and electronic document usage.
- Oversees end-user training for large multi-document projects and automated forms projects.
- Carries out post implementation reviews of multiple document projects and large automated forms projects.
- Prepares sections of user manuals in conjunction with business systems analysts.

Forms Manager (Level 8)

This description only covers forms management activities. In a large organisation, there will be other managerial responsibilities laid down by senior management. In a small organisation, the activities of this function may be much the same as those of a Team Leader.

GENERAL BUSINESS ACTIVITIES

- Where necessary, carries out tasks of all lower level staff.

COMPUTER USE

- Uses computer-aided design, word processing and project planning software.
- Installs software and system upgrades.
- Monitors quality of printers and other computer peripherals.
- Monitors suitability of equipment for all staff.
- Makes decisions on purchase of computer equipment.

DECISION MAKING AND PROBLEM SOLVING

- Where necessary, carries out tasks of all lower levels.
- Identifies and monitors risks for the department.

PLANNING

- Plans departmental work load and sets priorities to ensure targets are met within time constraints.
- Where necessary, carries out planning activities of all levels.
- Plans training needs of all levels.
- Plans and monitors budgetary needs for the department.
- Liaises with user department management on the development of forms projects.

GUIDANCE TO OTHERS

- Controls work of analysts and team leaders at all levels.
- Acts as consultant to user areas on matters associated with forms and information design.
- Acts as a mentor for all analysts and team leaders.
- Authorises revisions to forms and document design standards.
- Overviews document test plans and results for all projects. Provides guidance to levels 1 to 7 to ensure objectives are met.

IMPLEMENTATION AND TRAINING

- Where necessary, carries out implementation and training tasks of all levels.
- Liaises with user department management on implementation and training for major projects.