
Document management — Machine-readable paper forms — Optimal design for user friendliness and electronic document management systems (EDMS)

Gestion de document — Formulaires papier exploitables par machine — Conception optimale pour la facilité d'emploi et systèmes de gestion de document électronique (EDMS)



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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

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The main task of technical committees is to prepare International Standards. Draft International Standards adopted by the technical committees are circulated to the member bodies for voting. Publication as an International Standard requires approval by at least 75 % of the member bodies casting a vote.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights.

ISO 12029 was prepared by Technical Committee ISO/TC 171, *Document management applications*, Subcommittee SC 2, *Application issues*.

This first edition cancels and replaces ISO/TS 12029:2007, which has been technically revised.

Introduction

This International Standard discusses issues and provides guidance for the design of forms that are used for electronic capture of handwriting information. Features include colour dropouts, type fonts, printing screen tints, line width, data storage and other interrelated issues. It is necessary to balance conflicting requirements of user-friendliness and electronic capture. Making a form appealing by use of colour or graphics could assist users when they complete the form but could also decrease the form's scannability or other automated, related functions. This conflict might require compromise in the design of a form.

While this International Standard focuses on the design and structure of paper-based forms, it is worth noting that the design and structure of electronic based forms can have different characteristics, ensuring usability and readability. The user is advised that use of these specifications when developing paper-based forms while keeping in mind that electronic forms can be easily replicated in an electronic format (with the same content as in the paper-based form), but with differing fonts and spacing.

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1 Scope

This International Standard specifies requirements concerning the design of forms for user friendliness, with optimal machine readability for processing by electronic document management systems (EDMS). These requirements are limited to forms using roman characters.

2 Normative references

The following referenced documents are indispensable for the application of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 1073-1, *Alphanumeric character sets for optical recognition — Part 1: Character set OCR-A — Shapes and dimensions of the printed image*

ISO 1073-2, *Alphanumeric character sets for optical recognition — Part 2: Character set OCR-B — Shapes and dimensions of the printed image*

ISO 12651-1, *Electronic document management — Vocabulary — Part 1: Electronic document imaging*

3 Terms and definitions

For the purposes of this document, the terms and definitions given in ISO 12651-1 and the following apply.

3.1

alphanumeric

pertaining to a character set that contains letters, numbers and other characters, such as punctuation marks and symbols

NOTE Adapted from ISO/IEC 2382-4.

3.2

character pitch

number of characters per unit length of a line of print

3.3

dropout ink

ink of a colour that cannot be detected by a scanner