

► **Document management**

Glossary of terms



Document management - Glossary of terms

Archive	<p>A term to be used with care, as it has two meanings.</p> <p>In the 'technical' world of records management and archival science, it means a collection of records stored for preservation purposes – which implies that the archived information is well organised and well managed.</p> <p>However, in the 'everyday' world of business and IT, it is often used to mean a collection of information stored outside the main everyday systems (eg offline or in secondary storage); and this information is often poorly organised and indexed.</p>
Auditable	Capable of being proved by reference to an unalterable record of events (i.e. an audit trail).
Capture	The process of bringing a document into a document management system. This generally includes ensuring that it is appropriately indexed, described and protected.
Classification	The systematic identification and arrangement of documents into categories according to logically structured conventions. In practice, this boils down to organising records according to an agreed structure that is designed expressly to support the business.
Collaboration	The sharing and simultaneous use of documents by several users. This term is often used to describe a collection of software tools that provide features designed to make it easy for users to capture, share, publish, revise and re-use documents.
Compliance	Conforming to laws and regulations and, relevantly for document management, being able to demonstrate conformity by producing auditable documents that demonstrate the necessary steps have been taken.
Conversion	Process of changing records from one medium to another, or from one format to another (ISO 15489).
Digital	In most contexts, 'digital' is used with the same meaning as 'electronic' i.e. it is capable of being processed by a computer.
Document	Recorded information that can be treated as a unit. The term is used here to include information in almost any form (text, maps, databases, technical drawings, audio and video objects) and on any medium (electronic storage, paper, microfilm etc).
Document management (DM)	The set of processes, disciplines and technologies used to capture, store, and control documents.
Electronic	In most contexts, 'electronic' is used with the same meaning as 'digital' i.e. it is capable of being processed by a computer.

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Electronic document management (EDM)	The management of electronic documents contained in an information technology system, using computer equipment and software to manage, control, locate, and retrieve information in the electronic system.
Electronic records management (ERM)	The management of electronic and non-electronic records contained in an information technology system, using computer equipment and software, according to accepted principles and practices of records management.
Enterprise	An organisational unit. The enterprise may be a government agency, business, or non-profit organisation; and may be large, medium, or small in size.
Enterprise content management (ECM)	The technologies, tools, and methods used to capture, manage, store, preserve, and deliver content across an enterprise.
Indexing	The process of ensuring that a document is assigned important information in a way that will allow a document management system (or other research system) to find it reliably. The information usually includes objective information (such as author, address, title etc) and sometimes includes subjective information (such as a keyword). The indexing information is sometimes extracted automatically, sometimes entered manually.
Integration	The combination of several software applications such that data can be transferred from one application to others through a consistent interface which helps to better coordinate tasks and merge information.
Life-cycle	The course of developmental changes through which information, a document, or an information system passes from initial creation through mature uses to final disposition or replacement.
Metadata	Data describing context, content, and structure of documents and records and their management through time. Literally, data about data, eg, a document's title is an example of its metadata. Likewise, the list of people who are allowed to see the document is also a part of its metadata.
Middleware	The software that connects applications, allowing them to exchange data in a distributed computing system.
Record	Information created, received, and maintained as evidence or information created by an organisation or person in pursuance of legal obligations or in the transaction of business. (ISO 15489).

Document management - Glossary of terms

Records management (RM)	The planning, controlling, directing, organising, training, promoting, and other managerial activities involved with respect to the creation, maintenance, use, and disposition of records in order to achieve adequate and proper documentation of organisation and agency policies and transactions and the effective and economical management of the organisation or agency operations.
Repository	A direct access device on which the electronic records and associated metadata are stored. Also a synonym for archive.
Series	Documents arranged in accordance with a filing system or maintained as a unit because they result from the same accumulation or filing process, or the same activity; have a particular form; or because of some other relationship arising out of their creation, receipt, or use. A series is also known as a records series.
Structured (used in the sense 'structured information', 'unstructured document' etc)	<p>Arranged in a predictable way.</p> <p>Structured information normally consists of fields, or sequences of bits, that have predictable length and/or position. It is generally used directly by computer applications such as database systems. By contrast, unstructured information normally consists of sequences of bits that have unpredictable length and/or position. It is generally used by humans, through the mediation of computer applications such as word processing systems and image viewers.</p> <p>Adapted from MoReq2.</p>
Unstructured	See 'structured'.
User interface	Software that allows users to interact with a computer. This term is also used to describe the appearance and behaviour of that software.
Version (of a document)	The state of a document at some point during its development. Source: PRO Functional Specification, 2002 (Annex 1).

(Contributions from Inter PARES2 and ANSI/AIIM TR2-1998, Glossary of Document Technologies).

Business guidance in the document management series



The group's first paper, **'Document management concerns the whole board - a guide for all directors'**, was launched at a reception on 21 November 2007.

Aimed at non-technical board-level executives, it has been written to help organisations and come to terms with the information-heavy future that organisations everywhere are facing.

'Implementing document management - recommended practices and lessons learned' provides advice and guidance on how to implement document management solutions, looking at issues that arise specifically in document management projects.

'An approach to maximising your investment' is aimed at organisations that are already familiar with the concept of document management, and have already bought into the business case for it. It assists those who are ready to embark on a new document management programme of work, or indeed already have a document management solution in place but have plans for further work in this area.

'Collaborative Working Environments' is aimed at public and private sector organisations that face the challenges of forming teams across disciplines, on different sites, or working across time zones, when running projects and programmes.

'Safeguarding information, reputation and corporate productivity - a guide for information governance' is aimed at both public and private sector organisations, and provides guidance on how the requirements set out in the Cabinet Office paper 'Data Handling Procedures in Government' can met in large part by document management solutions.

'Addressing Information Risk and Compliance' provides guidance on how to comply with internal and external regulatory pressures, and minimise risk to businesses through document management'.

'Migration: a hidden danger lying in wait' discusses the rationale behind migration, what issues to consider when migrating information, and how to avoid some of the common pitfalls associated with this element of document management.

'Document management for SMEs' looks at the business case for document from the SME perspective.

To download any of the above reports visit www.intellectuk.org/docman

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