Understanding ECM Industry Acronyms

By Robert Blatt, MIT, LIT

May 2009

Contact:
Robert.Blatt
(805) 529 - 0600
www.eid-inc.com

EID *Electronic Image Designers, Inc.*
Specializing in Electronic Content Management Technologies

EDM = ECM = ERM = EDRMS = EDMS

Well here we go again!!

Just when you thought it was safe to enter the waters of ECM, a new year has started, along with the creation of several new and "improved" acronyms such as EDRMS and EC3M are now in full "marketing mode" by our industry.

Recognizing that the ECM industry has been evolving, technologies have matured and vendors have identified new ways to use these technologies. Through this maturation process new terms and acronyms have come into use. While most people understand that terms and acronyms will change from time to time, the amount of change in the use of these terms now takes place every year and in some cases multiple times throughout the year. For most organizations, except those that focus solely on trying to keep track of all the technology changes it is a bit much to absorb and keep organized in any cohesive fashion. The biggest problem is not so much the use of new terms or acronyms, but rather the use of the same terms/ acronyms for different purposes and meaning.

Terms Mix Process and Procedure

Another consideration that causes consternation among end-user organizations is that many of these terms not only incorporate technology but also process and procedure, but this is not fully taken into consideration. Technology by itself doesn't address most issues or needs of end-user organizations. As pointed out by a friend, you could conceivably have an excellent collaboration system with a well-organized delivery of information from person to person with occasional meetings. While this would be much slower than technology, it has worked very well for many years before computers became prevalent in the workplace.

So before we delve into the various terms and acronyms, consider how technology has enabled solutions previously unconsidered by organizations. Users should also recognize that when technology and process is combined, the results are very strong mechanisms used to manage business documents and records, which is also referred to as electronically stored information (ESI). When considering the various technologies, the challenge is to figure out what technology is needed and then try to compare various products from the vendor community while trying to weave through the various acronyms that are constantly changing.

Current Terminology

The current set of terms and acronyms are very confusing and at times are identical but used by different groups within our industry to mean something different as shown on the next page.

- Electronic content management (AKA **ECM**)
- Enterprise content management (AKA **ECM**)
- Knowledge management, (AKA **KM**)
- Business Process Management (**BPM**)
- Electronic Document Management (**EDM**)
- Electronic Document Management Systems (**EDMS**)
- Electronic Document Record Management Systems (**EDRMS**)
- Electronic Records Management (**ERM**)
- Enterprise Report Management (**ERM**)
- Web Content Management (**WCM**)
- Enterprise Content, Collaboration, and Communications Management (**EC3M**)

While this may seem confusing to end-users, they shouldn't feel alone as it is also confusing to people within the content (or document) and records management industry (I know what you are thinking…another set of terms!).

Keeping The Terms Straight

The key to weaving through this maze of terms and acronyms is to understand the core components and understand how to identify the difference between new marketing terms for an existing product that has been updated to reflect new capabilities or functions, and a new product not seen in the industry before.

So to help keep things sorted out, let's spend some time discussing the core technologies commonly associated with these technologies and how they are referenced by vendors, record managers, and end-users. These core technologies include inputting technology, processing technology, management technologies, and storage technology.

Core Technologies
- **Inputting technologies enable the user to either convert hardcopy documents into electronic format (document imaging) or import an electronic file (document/library services).**
- **Processing technologies typically include routing or workflow, forms processing, or electronic form management.**
- **Management technologies include records management applications (record schedules, record management plans, record disposition schedules, etc.)**
- **Storage technologies include either magnetic or optical storage and some users continue to use microfilm/microfiche.**

EID
Electronic Image Designers, Inc.

Over the past 25 years, we have seen the use of the core technologies change from being limited to converting hardcopy documents into electronic format to enabling organizations to also load other types of information already in electronic format. From that perspective we have seen the industry change from a document-centric environment to what is today considered simply as electronically stored information, or electronic content. This is an important consideration, as regardless of whether you call the information a document, record, or content, it is still electronically stored and managed by at least one component of the above-mentioned core technology set and usually several of the key components.

The Historical Perspective

From another perspective, when these technologies first came on the scene (early 1980's) they were referred to as Document Imaging (inputting technology) because at that time the technology only allowed users to convert hardcopy documents into electronic format and a few years later some basic routing came onto the scene. Years later (1990's), the technologies matured enabling organizations to incorporate electronic files into libraries. This resulted in the change of the use of the term "Document Management" to "Document/Library Services" (inputting technology) to better describe what the technology provided.

The change of the term "Document Management" to "Document/Library Services" was an important change because the term "Document Management" was initially used to describe the capability to store electronic information and later was updated to "Document/Library Services" which was a term everyone agreed best described this core technology functionality. The term "Document Management" was left to describe the industry as a whole, but unfortunately, as many people felt that the term "Document Management" was limiting in scope, the term "Content Management" became the term of choice (at least for a few years). So for all intent and purposes the terms "Document Management" and "Content Management" are synonymous.

Approximately 4 – 5 years ago some people began referring to these technologies as electronic records management (ERM) or more recently, Electronic document/records management systems (EDRMS) further complicating the issue. The key principle to consider when hearing these acronyms is that regardless of whether you consider the electronic information a "document", a "record", or "content" the information is the same: it is electronic and managed by at least one component (and usually more) of the core technologies.

Taking into account the term "Electronic Records Management" is actually EDMS (or ECM if you prefer) including a records management application used to implement the records management policies, schedules, disposition plans, etc into the electronic environment along with at least one of the core technology components. Otherwise without at least one of the core technologies the records management application can only be used for physical records management.

Following this, users begin to see that at the technical levels the following set of acronyms are effectively synonymous with each other but may include some variances in the core technologies implemented:

$$EDM = ECM = ERM = EDRMS = EDMS$$

From that perspective, the only difference between ECM/EDM/EDMS (traditional electronic document management components) and EDRMS/ERM/ERMS (traditional electronic document management components AND a records management application) is the inclusion of the records management application. As a result, all of these terms and acronyms are effectively the same. Many vendors will argue this point, but if ask them to describe how information is loaded into the system, processed, and managed you will quickly be able to identify at least one of the core technologies and usually several of them.

The reason these terms constantly change is that many vendors, marketing people, and industry analysts/consultants sometimes feel that it is easier to come up with a new term/acronym to describe a new variant of the core technologies that are produced. It should be recognized that as these technologies mature and are updated to include new functionality not previously available, the industry has a tendency to come up with the new term/acronym rather than discussing the level of maturity of these products, resulting in many people feeling that this is a new technology and the previous technologies are "out of date".

Don't feel alone if you are getting confused as these terms are being created by vendors and (as much as I hate say this) industry analysts, everyone gets confused on exactly what the differences are between the "new" or "improved" term or acronym and the old/existing term/ acronym, including the vendors and industry analysts. How does that old saying go: "everyone is an expert 10 miles from home", so when you hear someone using an acronym or term that you are unfamiliar with, don't be shy in asking for more detailed information on exactly is intended by the vendor.

In all fairness, it should be pointed out that these changes aren't sinister in nature, but rather a marketing approach to describing new methods of utilizing existing technology or updates to existing technologies. While this is very challenging, the easiest way to "weave" through this maze of terms and acronyms is to consider how the terms are used and what technology and/or capability is being provided. Additional information on how these technologies work and how they are commonly used is included in the ECM industry best practice: ARP 1 – Implementation Guidelines document located on the AIIM standards website and is available for download at no cost.

This article was published in Infonomics at www.aiim.org/infonomics.