

Bringing service to life



MoReq2 Status Report

Presentation to:
DLM Forum, Lisboa, 22 November 2007



By
Marc Fresko, Serco Consulting

Agenda

- Background
- Status
- Impact on records management
- Ongoing governance

Slide 2



Agenda

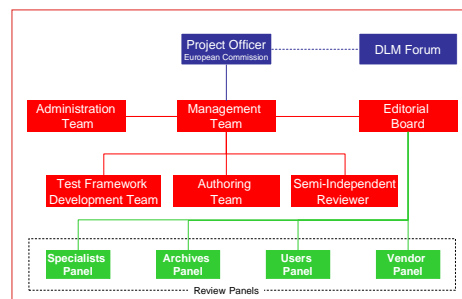
- Background
- Status
- Impact on records management
- Ongoing governance

Slide 3

serco

Background: the MoReq2 project

- MoReq2: evolution of MoReq
- With test framework
<http://www.imbus.de>
- Large, complex project
- Iterative development
- Over 200 reviewers
- Open process
<http://www.moreq2.eu>
- Project started January
- Due to complete year-end



Slide 4

serco

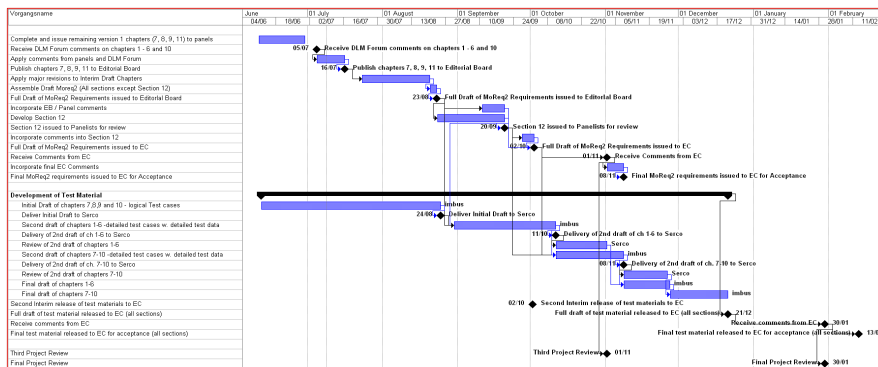
Agenda

- Background
- Status
- Impact on records management
- Ongoing governance

Slide 7



Status: the project plan




July 2007

Slide 8



Status: the project plan

	Milestone	Date
1	Kick-off meeting, Brussels	Completed
2	1st Editorial Board meeting	Completed
3	Initial draft of MoReq2 (Draft1) issued to EB and Panels	Completed
4	Interim test material released to EC	Completed
5	Panel review complete	Completed
6	2nd Editorial Board meeting	Completed
7	Interim Draft of MoReq2 issued to EC (Draft 2)	Completed
8	Draft test material released to EC	Completed
9	Full Draft of MoReq2 Requirements issued to Editorial Board	Completed
10	Second Interim release of test materials to EC	Completed
11	Full Draft of MoReq2 Requirements issued to EC	Completed
12	Final MoReq2 requirements issued to EC for Acceptance 	08/11/2007
13	Full draft of test material released to EC (all sections)	21/12/2007
14	Final test material released to EC for acceptance (all sections)	13/02/2008
15	Acceptance of all Deliverables by EC	13/02/2008

Slide 9

serco

Status

- Moreq2 full draft issued for review
<http://www.moreq2.eu>
- Two weeks behind plan
- Review comments received
- Some revisions now needed
- Publication now delayed until early 2008
- Progress meeting held this morning – precise date not yet available
- Watch project website for developments

Slide 10

serco

Agenda

- Background
- Status
- Impact on records management
- Ongoing governance

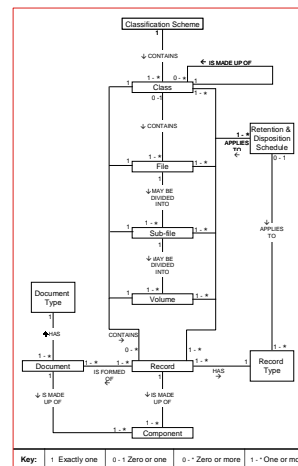
Slide 11

serco

Impact: new records management features

Contentious new features:

- Store records directly 'in' classes without files
 - or don't
- Divide files
 - into volumes
 - into sub-files
 - into volumes and sub-files
 - not at all



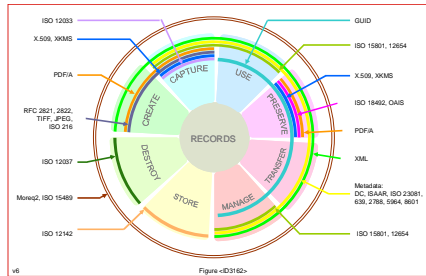
Slide 12

serco

Impact: new records management features

Non-contentious features

- Distributed systems
- Offline and remote working
- Components
- Automatic extraction of file format and version
- Standards model

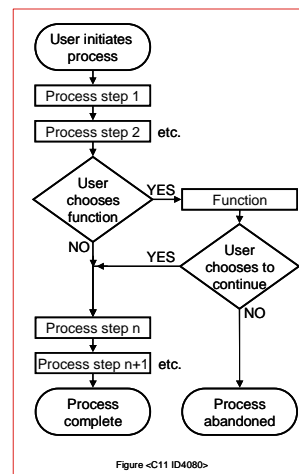


Slide 13

serco

Impact: new subjects covered

- Completely new
 - Business processes
 - Content management integration
 - Digital rights management
 - Case management
- Increased detail
 - Physical records
 - Electronic signatures
 - e-mail and fax integration
 - etc
- Chapter zero



Slide 14

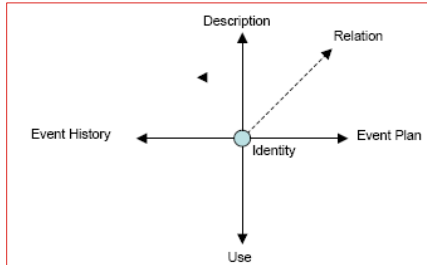
serco

Impact: new metadato model

- Completely new
- 121 elements (so far)
- More detail
- More formal
- Heavily cross-referenced
- Input to xml schema

M025: Relation.r&d_schedule

M025	Obligation	See comment	Occurs	Many
Definition:	The identifier of the retention and disposition schedules assigned to the entity.			
Applies to:	class ✓	file ✓	sub-file ✓	volume ✓ record ✓
Populated:	Can be automatically populated by the ERMS when the retention and disposition schedule is inherited, subject to inheritance rules. Where inheritance is not possible for classes at the top level of the classification scheme and if no inheritable retention and disposition schedule applies a default retention and disposition schedule is applied at the option of an administrative role - see <ID2988>			
Use conditions:	Can be modified by an administrative role or by users with appropriate access rights.			
Comment:	Mandatory for class, file, sub-file and volume.			
Requirements	2980, 2325, 2988, 4025			



Slide 15

Impact: xml schema

- Expected in early 2008
- Could revolutionise ERM system migration and interoperability
 - Easier to upgrade ERMS
 - Easier to merge organisations
 - Easier to transfer records to national archives

```

<?xml version="1.0" encoding="UTF-8" ?>
<!--
  Created with SRE2PV v5.041.2.0 (http://www.snlazy.com)
-->
<!--
  Schema targetNamespace="http://www.foo.bar"
  xmlns:xsd="http://www.w3.org/2001/XMLSchema"
  xmlns="http://www.foo.bar"
  xmlns:q1="http://www.foo.bar" elementFormDefault="qualified"
  attributeFormDefault="unqualified" version="0.1" id="foo.bar"
-->
<!--
  Schema metadata here
-->
<!--
  appinfo
-->
<!--
  Annotations
-->
<!--
  Include schemaLocation="CommonSimpleTypes-v1.xsd" ?>
-->
<!--
  element name="Accessibility" type="MetadataElementStructure" />
<!--
  element name="Aggregation" type="AggregationType" />
<!--
  element name="Address" type="MetadataElementStructure" />
<!--
  element name="Author" type="MetadataElementStructure" />
<!--
  element name="Creator" type="MetadataElementStructure" />
<!--
  element name="Date" type="DateStructure" />
<!--
  Annotations
-->
<!--
  Documentation: DateStructure is defined in each aggregation-level
  schema.
-->
<!--
  Annotations
-->
<!--
  element name="Acquired" type="DateType" />
<!--
  element name="Available" type="DateRangeStructure" />
<!--
  element name="Created" type="DateType" />
<!--
  element name="Cutoff" type="DateType" />
<!--
  element name="Declared" type="DateType" />
<!--
  element name="Opened" type="DateType" />
<!--
  element name="Closed" type="DateType" />
<!--
  element name="Issued" type="DateType" />
<!--
  element name="Modified" type="DateType" />
<!--
  element name="NextVersionDue" type="DateType" />
<!--
  element name="UpdatingFrequency" type="DateRangeStructure" />
<!--
  element name="Valid" type="DateRangeStructure" />
<!--
  element name="Description" type="MetadataElementStructure" />
<!--
  element name="DigitalSignature" type="MetadataElementStructure" />
<!--
  element name="Disposal"
  <!--
  element name="DisposalScheduled"
  <!--
  element name="DisposalAction"
  <!--
  simple type
  <!--
  restriction base="xsd:string"
  <!--
  enumeration value="destroy"
  <!--
  enumeration value="review"
  <!--
  enumeration value="export"
  <!--
  enumeration value="transfer"
  <!--
  restriction
  <!--
  simple type
  <!--
  restriction
  <!--
  element ref="DisposalPeriod"
  <!--
  element ref="DisposalEvent"
  <!--
  
```

Slide 16

Impact: testing

- Modular structure
 - Core module of records management features
 - Several “optional” modules
- Detailed test scripts developed by imbus AG
- Extensive
- Expected to lead to testing regime...



Slide 17

serco

Impact: testing

- Drafts posted on website <http://www.moreq2.eu>
- Current draft based on draft v2 of MoReq2 – now superseded
- Currently being updated
- Will be available for comment on website

MoReq2 – Test module 4 / Capturing Records

6.1.1.2 Object name already exists

1. Global test case information	
File name	File description
6.1.1.2.1	Object name already exists
6.1.1.2.1	Object name already exists
6.1.1.2.1	Object name already exists

2. Test case

Test case description	Test case steps	Expected results
1. Verify that the object name already exists in the file.	1. Log in as user 'admin'.	1. The object name already exists in the file.
2. Verify that the object name already exists in the file.	2. Log in as user 'admin'.	2. The object name already exists in the file.
3. Verify that the object name already exists in the file.	3. Log in as user 'admin'.	3. The object name already exists in the file.

Slide 18

serco

Agenda

- Background
- Status
- Impact on records management
- Ongoing governance

Slide 19



Ongoing governance

- Testing
 - Proposition from imbus is being considered
- Other governance issues need to be agreed by DLM Forum
 - Ongoing maintenance and development
 - Chapter zero
 - Translations
 - Websites

Slide 20



Impact: products

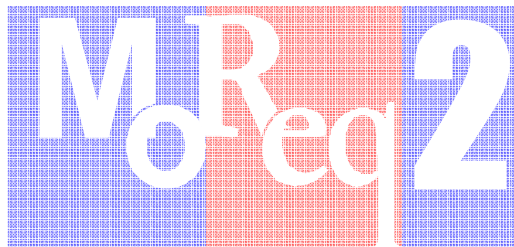
- Standard products across Europe
- A wave of development
- Products easier to use and more powerful
- Spreading beyond strict records management



Slide 21

serco

Questions



<http://www.moreq2.eu>

moreq2@serco.com

marc.fresko@serco.com

+44 20 7089 4650

Slide 22

serco