

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

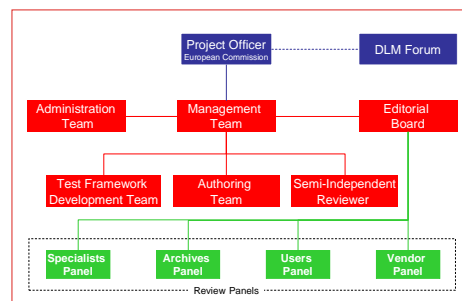
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Slide 3

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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

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Background: the team

The Team

- Keith Cornwell
- Alayne Crozier
- John Deverill

- Caroline Senior
- Natasha Smith

Slide 5

Test framework

- Michael Haimerl
- Tilo Linz
- Thomas Rumi
- Michael Sill

Authoring

- Tim Burrows
- Peter Campbell-Burns
- Marc Fresko
- John Seeley



Background: Reviewers

Mr Miguel Canedo	Schul 17 A, Spain	Mr Alvaro Durago	RedCorp, Information and Records Management Australia	Mr Terhi Sore Jari	Gesellschaft Coblenz, Spain
Mr Marco-Alex Clavin	Avenue 17, France	Mr Bruce Callin	Howe Stone Architects (a Record Management Department of Irving-Coleman & Harrop), Canada	Mr Dennis Sharp	Northallerton Council, UK
Mr Anne-Maria Doran	Department, Norway	Mr John Calkin	Howe Stone Architects (a Record Management Department of Irving-Coleman & Harrop), Canada	Mr Alan Simpson	Group 7, Ireland, UK
Professor Luciano Drenth	School of Library, Archival and Information Studies, University of British Columbia, Canada	Mr John Ewan Currie I	Records Group, Department of Justice, Publications, Spain	Mr Murray Summers	Republic of the Republic of Croatia
Professor Maria Ines Gomez	University of Thessaly, Italy	Mr Alvaro Delgado	Records Group, Department of Justice, Publications, Spain	Mr Stanley Vial	International Fund for Agricultural Development, Italy
Mr Peter Horman	Archivdienst des National Archives for Archival Education and Research, The Netherlands	Mr David Dejean	Records Group, Department of Justice, Publications, Spain	Mr Peter VanGoolen	Archival Services, Canada
Dr Ulrich Jungblut	PERFECT CONSULT, Unternehmensberatung GmbH, Germany	Mr Peter Elm	Royal Pharmaceutical Society of GB	Mr Willem Vanover	Technische Universiteit, Belgium
Mr Paul Murphy	Ministry of Finance, Ireland	Mr Frank Fels	Information Management Department, Australia	Mr Gerard Viers	State Systems, France
Mr Richard Rids	UK	Mr Louis Flieman Stefan	Intel Research/Canada of the European Communities, Italy	Mr Martin Wirthner	SAPPHIRE, Germany
Mr Roberto Cordero Sanchez	Spain	Mr Marc B. Nieuwen	European Central Bank, Germany	Mr Maxim Bohl	IBM, UK
Mr Christa de Sola	France	Mr Alvaro Gomez	Chassis, UK	Mr Timothy Calvert	Ep Group, AI, Norway
Dr Andrea Drogan	Germany	Mr Stefan Goshanov	University of Hamburg, Germany	Mr Ian Cooper	Leidos Health, USA
Mr Peter Engelen	Netherlands	Mr Steven Gray	Postmaster, Australia, UK	Mr Steve Cook	Open Text Corporation, UK
Mr Gordon Fitzmaurice	Sweden	Mr Harold C Harsh Jr	Canada, USA	Mr Tom Cook	Manitex, UK
Mr Gail McFadden	UK	Mr David Higgins	Digital Commons, Canada, University of Edinburgh, UK	Mr Tom Cook	Optima Corporation, UK
Mr A de Spijkhof	Netherlands	Mr Caroline Ives	Midwest City Council, UK	Mr Graham Howland	Manitex, UK
Mr Peter Hoffmann	Germany	Mr Philip Jones	Midwest City Council, UK	Mr Thomas Howland	Records Information, Germany
Mr Malcolm Todd (chair)	UK	Mr Ben Lamm	Centre Tecnològic, Spain	Mr Thomas Howland	IEEE, Canada, USA
Mr Martin Walker	UK	Mr Martin E. Llaneras	Electronics Office Systems, Spain	Mr Mike Roberts	Leidos Health, UK
Mr Francisco Balado	Departamento de Archivos, Biblioteca y Sala de Lectura, Portugal	Mr Steven Lindsay	Digital City Council, UK	Mr Chris Rogers	Teves Software, UK
Mr Ian Dobson Swanson	Department of the Archives Administration and Records Management, Czech Republic	Mr Peter Lister	Midwest City Council, UK	Dr George Jones	IEEE Software Development, Germany
Mr Ian Riddison	Department of the Archives Administration and Records Management, Czech Republic	Mr Steven Loh	USA	Mr Václav Jahn	SAPPHIRE, Germany
Mr Robert Leitch	Records Management, Sweden	Mr Stephen Macintosh	Records Group, Department of Justice, Publications, Spain	Dr James de Jersey	Deutsche, Germany
Mr Michael Vlasov	Department of the Archives Administration and Records Management, Czech Republic	Mr Steve O'Rourke	Records Group, Department of Justice, Publications, Spain	Mr Mark Leitch	IBM, UK
Mr Sergey Abramov	Records Management, Czech Republic	Mr Mark O'Mara	Records Group, Department of Justice, Publications, Spain	Mr Andy King	Geosoft, UK
Mr Pierre Chaves	Records Management, Belgium	Mr Adam Pope	Information, Italy, USA	Mr Teresa McEneaney	UK Software
Mr Michael Coen	ALMA International, Belgium	Mr Stephen Reed	Records Management, Australia	Mr Clay Palmer	CA, UK
Mr Kimberly Burns	Records Management, UK	Dr David Ross	Records Management, Australia	Mr Stephen Rasmussen	Open Text Corporation, UK, Canada, USA
Mr Keith Butler	PRC Bank, USA	Mr Mike Rowland	Records Management, Australia	Mr Andrew Sawchenko	Figura, UK
Mr David Boyd	Veracore Corp, USA	Mr Mike Rowland	Records Management, Australia	Mr Dan Tallent	EMC, Canada
		Mr Mike Rowland	Records Management, Australia	Mr Nigel Wood	Manitex, UK

Slide 6



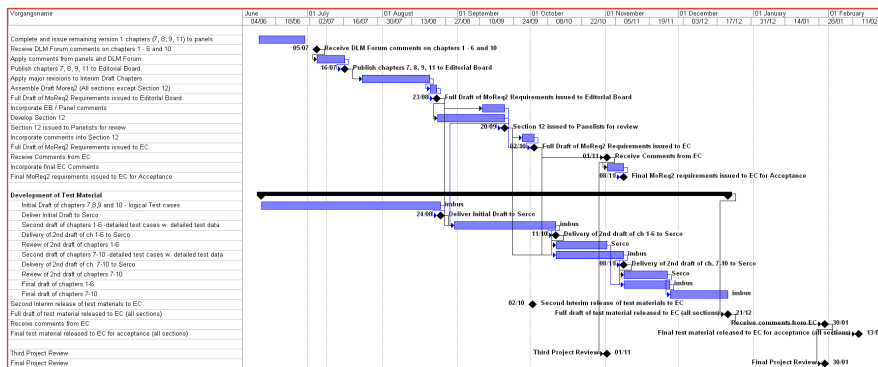
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Slide 7



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

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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

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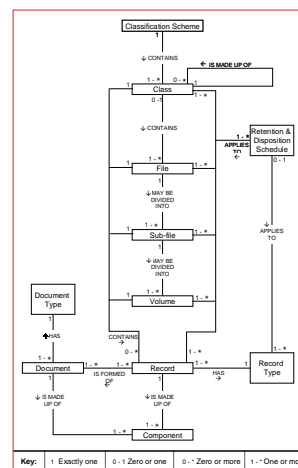
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Impact: new records management features

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

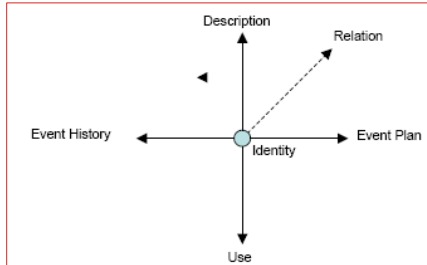
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Impact: new metadato model

- 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 en1. 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
  <!--
  element ref="DisposalPeriod" />
  <!--
  element ref="DisposalEvent" />
  
```

Slide 16

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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

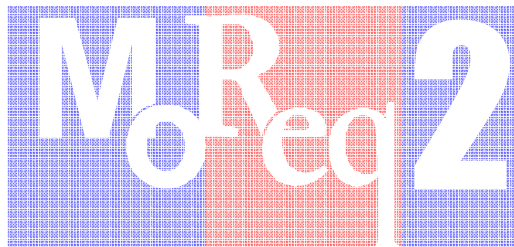
- Standard products across Europe
- A wave of development
- Products easier to use and more powerful
- Spreading beyond strict records management



Slide 21

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Questions



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Slide 22

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