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The next step

Doug Miles, managing director, AIIM Europe, takes a look at MoReq2. What is it and why is it important?

MoReq2 is a model requirements specification for the management of electronic records endorsed by the EU and the UK National Archives. It is useful for both procurement of new records management systems and the audit of existing systems.

Reflecting increasing concern that traditional records-keeping policies and methods are not keeping pace with the rapid advances of electronic communications, MoReq2 sets out a model regime for the lifetime management and archive of a very wide range of electronic document and content types. MoReq2 is not a standard as such but a definitive guidance document that can be used for procuring, configuring or extending records management systems.

Like the original MoReq, published in 2001, MoReq2 has been produced by the DLM Network, a European grouping of national archives, suppliers, consultants and users, with funding and endorsement from the EU. It was published earlier this year and is now ready for use.

The objectives for this revised and refined version of MoReq were firstly to bring it up to date with new technologies. Areas such as XML, e-mail management, electronic signatures, and distributed access are now covered. Applicability is improved for both public and private sector usage, with additional work in many areas such as outsourced capture, non-hierarchical classifications, casework sub-files and general usability. The updating process has also included changes to match current legislative practice and a better alignment with recent ISO standards.

Testing Regime

A fundamental requirement from the outset of the MoReq2 project was that it would be a testable standard, much along the lines of the US DOD 50.15.2, and the TNA Approval scheme. Indeed, the TNA scheme was lapsed in 2006 with a view to future replacement by MoReq2. The supplier community has been supportive of the project from the outset, preferring a pan-European standard to one that involved multiple testing in each country.

Many of the elements of the original MoReq have been clarified and refined to make testing possible, and most significantly, a set of defined test scripts have been produced and published to allow testing to be more transparent. Given the development lead times of all complex software products, it is too early as yet to be seeing tested and compliant products, but the testing regime is planned to be in place by the end of the year.

In the meantime, MoReq2 provides an excellent resource for all managers of existing records management systems and those involved in implementation projects. It provides a very useful base for auditing or assessing existing systems. In a wider respect it may also be applied to a complete records management regime of systems and processes, be it in house or outsourced.

It is written in a 'the system must…the system should…' style allowing core requirements to be separated from desirable elements. It is also modular, allowing optional modules such as Workflow or Digital Rights Management to be evaluated in their own right.

System Procurement

MoReq2 is freely available as a download from www.moreq2.eu in both PDF and Word format. It would, of course, be very tempting to copy and paste whole sections of the requirements listing into a request for tender from a software supplier, but this is not an advisable way to use it.

MoReq2 is a very comprehensive document. If an analogy existed for cars it would cover every type of vehicle from a city commuter car to a 4x4 farmer's car. There are many 'essential' requirements for both types of car due to legal regulations, safety aspects, driver familiarity, service support, etc, and yet the owner's use dictates many different priorities for the 'desirable' elements. For any given project or organisation, MoReq2 provides a toolbox from which to select an appropriate set of requirements.

An interesting area of the document is that on ease of use, performance and scalability. Whilst admitting that these important attributes cannot be defined in terms of functionality, MoReq2 does set out some useful requirements of usability, and sets a number of specific response target times. It also tackles the difficult areas of long term preservation and technology obsolescence.

MoReq2 should not just be thought of in regard to a stand alone or dedicated EDRM system. For many organisations, records management is an integral aspect of a business-specific function such as case management, planning applications or HR. These systems may have a dedicated records management module or it may be a standard aspect of the internal workflows. In either case, a comparison of features against MoReq2 would provide considerable insight into the robustness and potential compliance of the system and its operating procedures.

Related Standards

MoReq2 exists within a complex framework of other standards and guidelines covering both the whole subject area, such as ISO 15489, and specific aspects of preservation, admissibility and metadata modelling. This latest version takes account of those standards and provides better alignment and cross-

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referencing to them.

It also introduces a new metadata model with two closely related purposes, namely to define the metadata needed to allow exchange of records between ERM systems with no loss of MoReq2-related mandatory functionality, and to define such metadata sufficiently to allow the production development and use of a MoReq2 XML schema.

To help users familiarise themselves with MoReq2, and to discuss its use and applicability, AIIM will be running a workshop entitled 'Advanced Records Management and the Role of MoReq2' on 27 November in Slough. Speakers will include Marc Fresco from Serco a lead author of the document, and Richard Blake of The National Archives who was heavily involved in each stage of the project.

For more information
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