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TO INFORMATION MANAGEMENT

HARD FACTS ABOUT MOREQ2010 AN INFORESIGHT PAPER

If you have an interest in electronic records management, you need to be fully up to date about the MoReq2010 consultation process – and you should take part in it. The consultation is due to be open until 26 December 2010, so don't lose any time. The consultation draft of MoReq2010 is long and complex. In my view it goes much further than the expected refactoring and simplification of MoReq2; instead, it is a radically new specification that relies on many new ideas, some of which are complex. Here are a few facts about it, in the hope that they will inform your review.

WHAT'S GOING ON?

- ▶ A draft of part of MoReq2010 is in consultation at the moment. **Your comments as part of the consultation will be very welcome.** To comment, go to <http://contribute2moreq.eu>.
- ▶ The consultation is due to finish on 26 December 2010.
- ▶ The part that is in consultation is intended to represent the “core” minimum workable specification for electronic records management. It is referred to as version 0.92 of MoReq2010.
- ▶ Additional parts called “extension modules” are expected in 2011. A timetable for their consultation and finalisation is promised for 17 December 2010.
- ▶ The test framework is missing from the current draft. This is unfortunate, as experience shows that developing detailed test conditions tends to uncover problems in the requirements. A timetable for test framework consultation and finalisation is also promised for 17 December.
- ▶ The xml schema is missing from the current draft. A timetable for xml schema consultation and finalisation is also promised for 17 December.

WHAT ABOUT THE CONTENT?

- ▶ The draft contains a minimum of **475 mandatory requirements**. This is **more** than the core of MoReq2, which includes 466 requirements.
- ▶ The minimum workable specification consists of all the requirements in sections 1.5 to 1.15 **plus** the requirements in module 101 or 102 **plus** the requirements in module 201

or 202 **plus** the requirements in module 301 or 302. Many implementations will require both modules 301 and 302. Further “extension” modules are due to be developed in 2011 and subsequent years.

- ▶ The draft takes records management further than MoReq2, for example allowing for manage-in-place architectures, API-only interfaces, and (importantly) the separation of classification from aggregations.
- ▶ The language of the draft is more rigorous than the language in MoReq2. The draft is developed using well-articulated principles and structures that contribute to its rigour (though much of the basis for its rigour, namely the links between functions, requirements and metadata elements, is not visible in this draft and so has to be taken on trust).
- ▶ The draft relies on several new concepts which are novel to many practitioners. For example, the absence of audit trails, the way “alerts” are defined and handled, “export headers”, “generations” and heavy reliance on UUIDs to name a few. **These concepts are open to consultation once only, until 26 December 2010.**
- ▶ MoReq2010 in effect defines a new way to describe and store electronic records and their metadata, and implicitly it calls for this new way to be adopted for the indefinite future. **This concept is open to consultation once only, until 26 December 2010.**
- ▶ There are no “optional” or non-mandatory requirements in this draft of MoReq2010.
- ▶ 48 “non-functional requirements” are included in the draft (they are worded as open questions rather than requirements). There are no requirements for “ease of use”.
- ▶ The draft is not fully compatible with MoReq2. It contains some features which are contrary to MoReq2 requirements.
- ▶ The draft omits several features of great importance to some users, such as interfaces with email, office systems and scanning subsystems. These may follow in extension modules.

WHAT ABOUT THE TIMING?

- ▶ The consultation period is due to close on 26 December 2010.
- ▶ Publication of the final version of the core is promised for 31 December 2010.
- ▶ The original plan allowed for two months between end of this consultation and publication of the final specification. The two months were to allow for revision, review by the Editorial Board, independent QA, and approval by the DLM Executive Committee. The planned two months is now reduced. The current plan collapses this two month period into **five days between Christmas and the New Year**. It is difficult to see how revision, reviews by the Editorial Board and Executive Committee plus independent QA can be fitted into this period if the consultation is taken seriously.

WHAT NEXT?

- Go to the consultation site – <http://contribute2moreq.eu> – to comment.
- The consultation site requires registration, and is fairly easy to use.
- The draft is available in two forms: as 100 separate web pages, each of which has to be commented on separately; and as a single 206-page PDF which is not searchable. Comments have to be submitted using the 100 web pages.

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Inforesight Limited, 13 December 2010