



Breaking the Barriers of Traditional Records Management
Dr. Ulrich Kampffmeyer
DLM Forum Conference
Toulouse, 12.12.2008



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Traditional Records Management**

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Toulouse, Decembre 12th 2008

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Records Managers love this Type of Record

It's handy

It's rare

It's valuable

It's solid

It easily stores in Cabinets

People enjoy looking at it

It carries a Part of our History

Archivists even love it more ...

**These
Days
are gone.**



This presentation is about

**Records, Records Management,
Enterprise Content Management
and the Lifecycle Concept of MoReq2.**

**Challenges for traditional Records
Management in a rapidly changing
digital World.**

Implications and future Tasks.

Yes, we got good Definitions ...

*Information created, received, and maintained
as evidence and information by an organisation
or person, in pursuance of legal obligations or
in the transaction of business.*

*Field of management responsible for the
efficient and systematic control of the creation,
receipt, maintenance, use and disposition
of records, including processes for capturing and
maintaining evidence of and information
about business activities and transactions
in the form of records.*



... but we still got different Perceptions ...

The **Archivists** as “Pre-Preservation” ...

The **Public Sector Records Manager** as
Result of a “Bureaucratic Process” ...

The **Chief Compliance Officer** as
“Legal Evidence” of his Business Activities ...

The **IT Manager** as “Application” of his
ERP-Solution ...

The **Programmer** as “Structure and Fields”
in his Legacy Application ...

The **Music Fan** as the “Directory Functionality”
of his LASTfm Records ...

Today we talk about ...

Content, Documents, eMails, Media Assets,
Forms, Files, Images, Videos, Web Pages,
Audios, Twitters, PDFs, Datasets, a.s.o.

Some propose to generally speak of

Information Objects

This is OK, but ...



**There is still the Need
of the Concept of a Record**

**Not all Information Objects will
become a Record**

and

**not all Information Objects,
either Records,
will end up in an Archive**

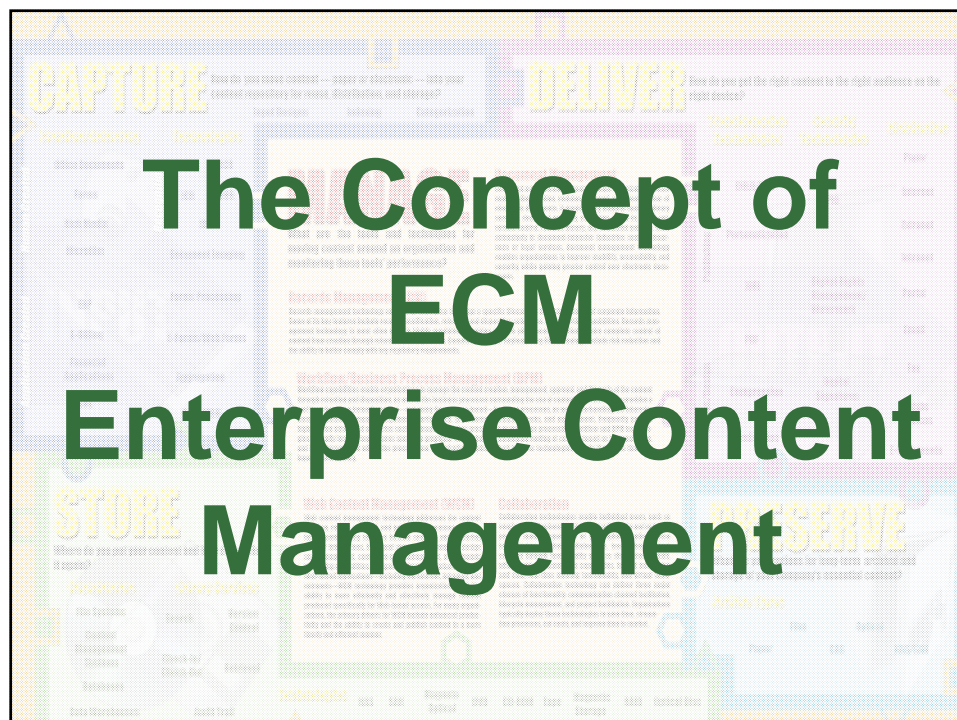
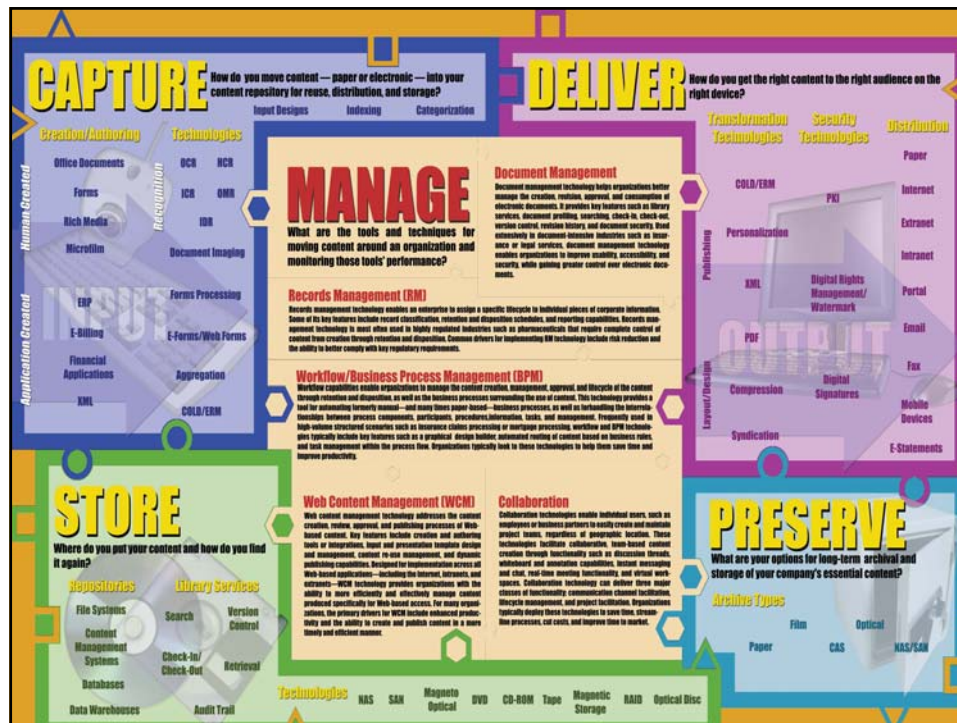
**Because Records can be defined as well by
their Attributes**

- **Business Value**
- **Legal Value**
- **Context**
- **Integrity**
- **Persistence**
- **Authenticity**
- **Defined Metadata**
- **Consistency**
- **Classification**
- **and more,**
which separate Records from other Objects



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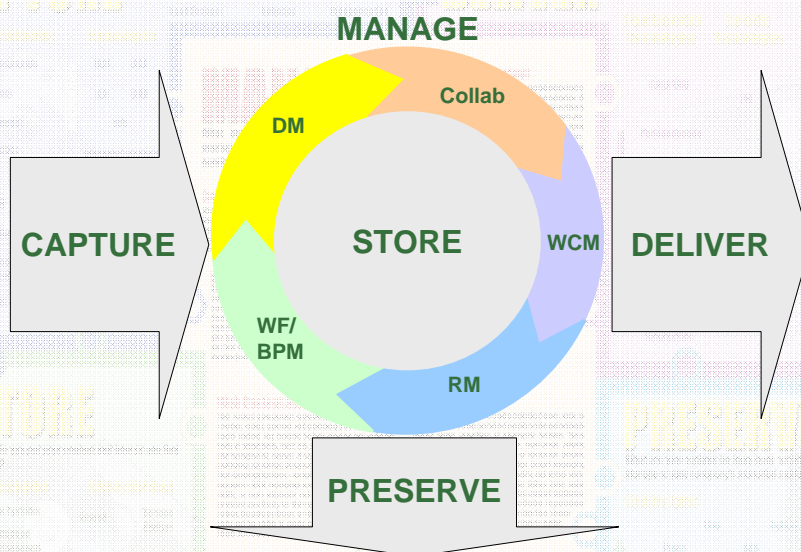




The Software Industry moved on ...

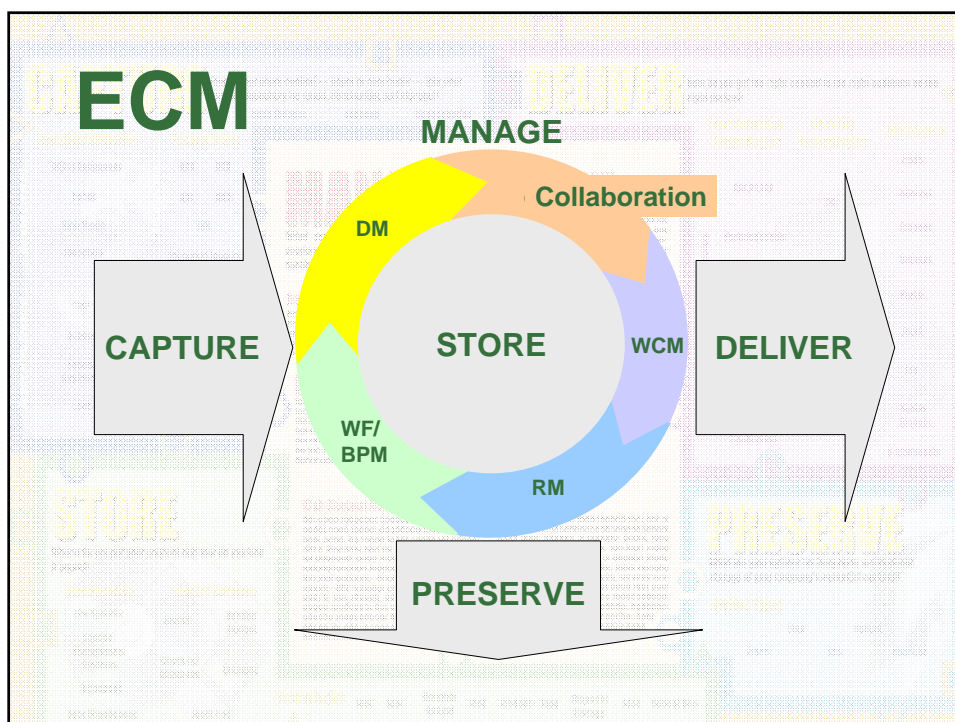
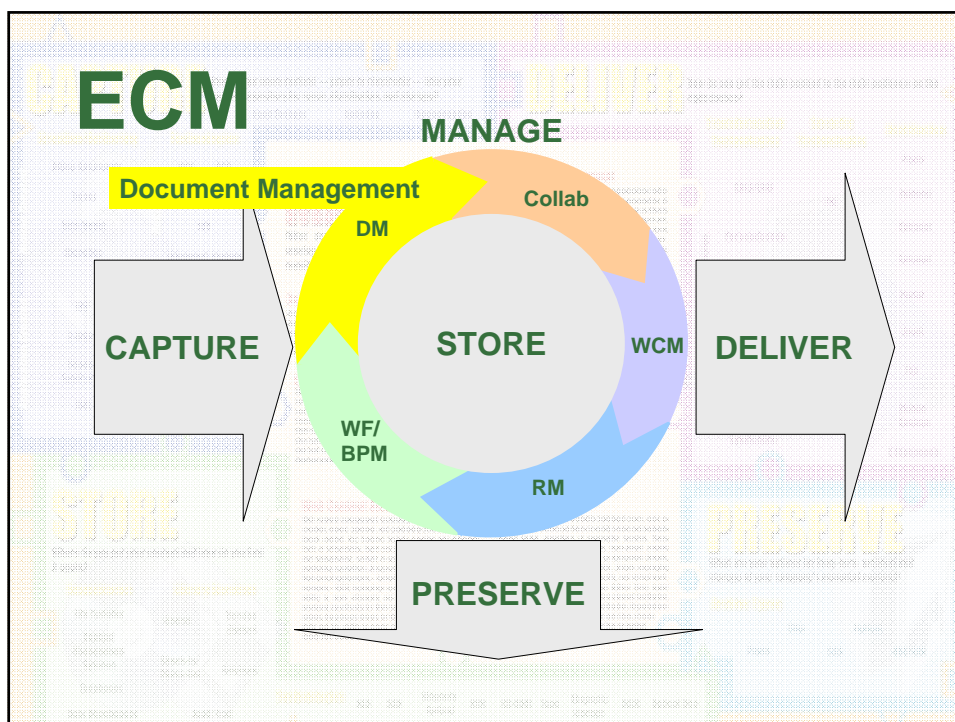
*“Enterprise Content Management
is the Technologies used to
Capture, Manage, Store, Preserve
and Deliver
Content and Documents related to
Organizational Processes.”*

A Lifecycle Model ...



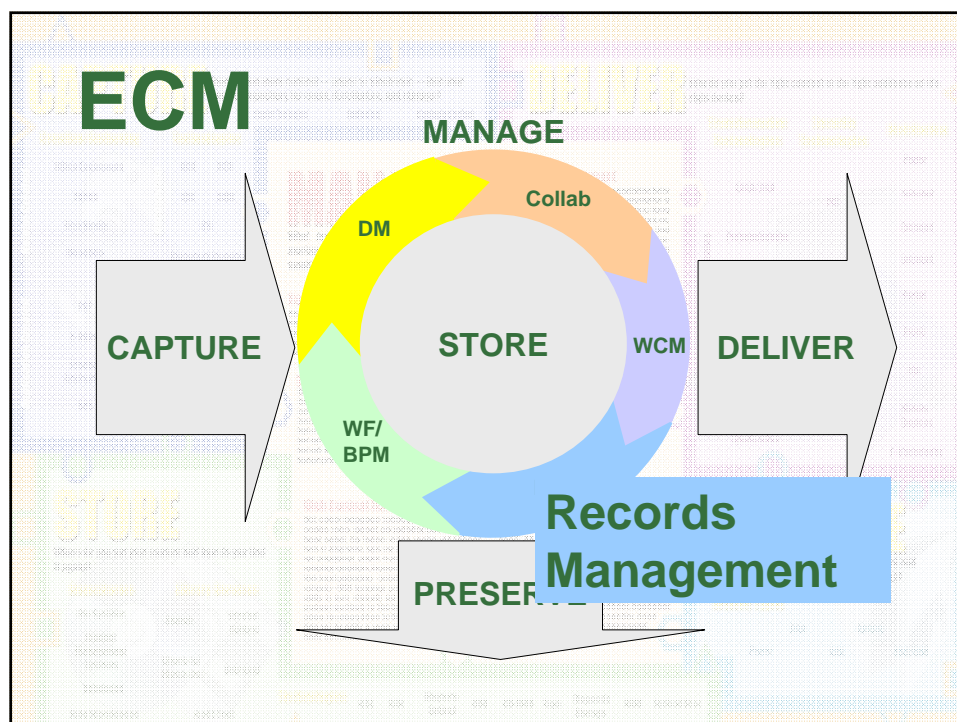
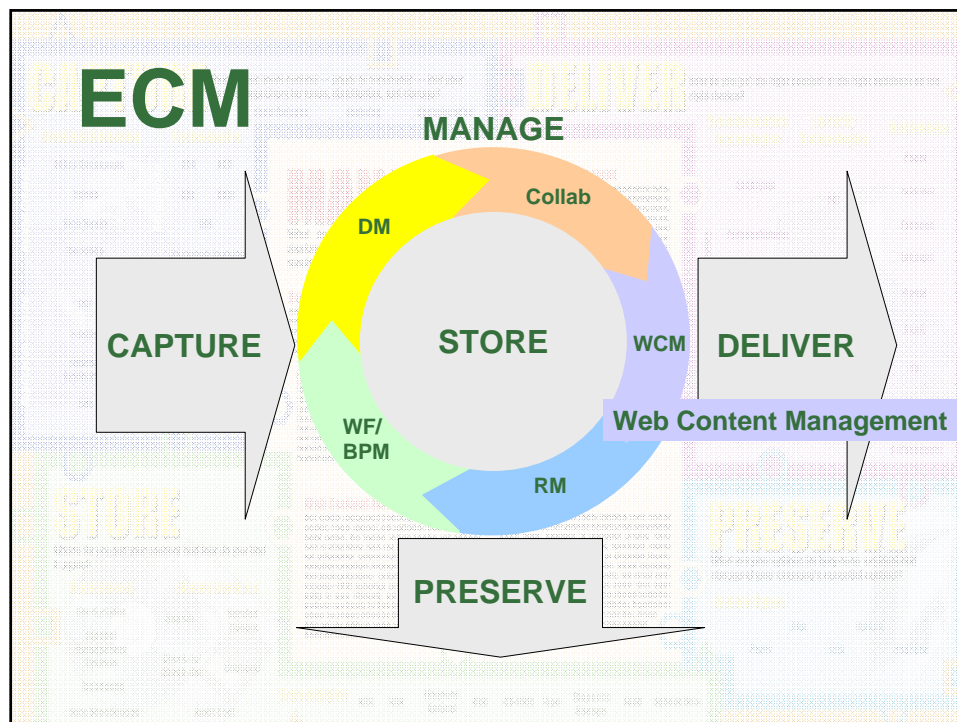


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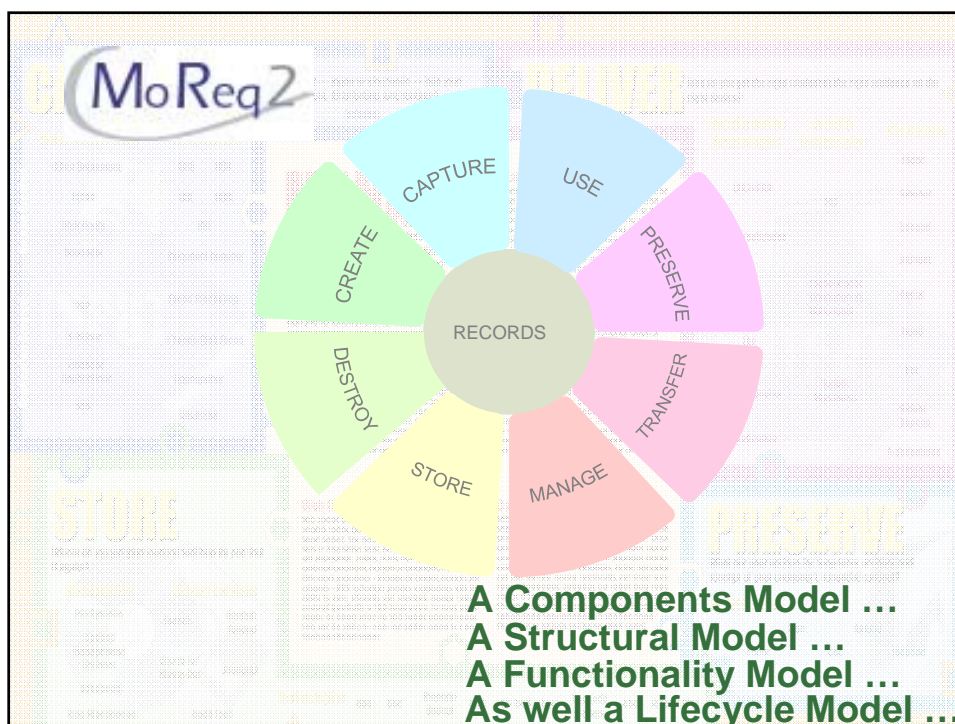
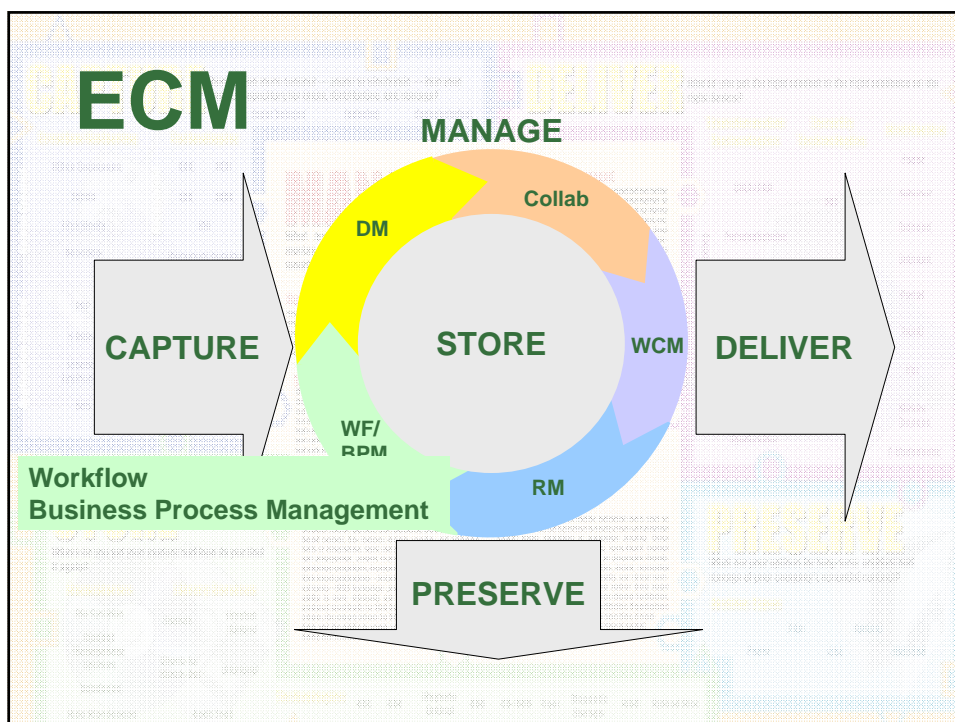
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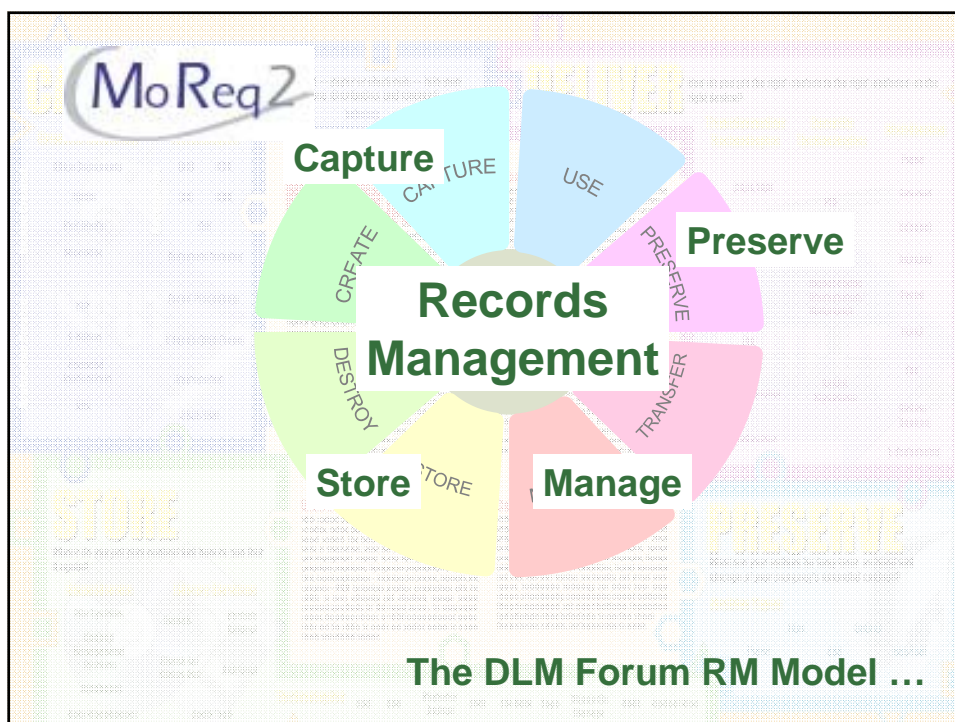
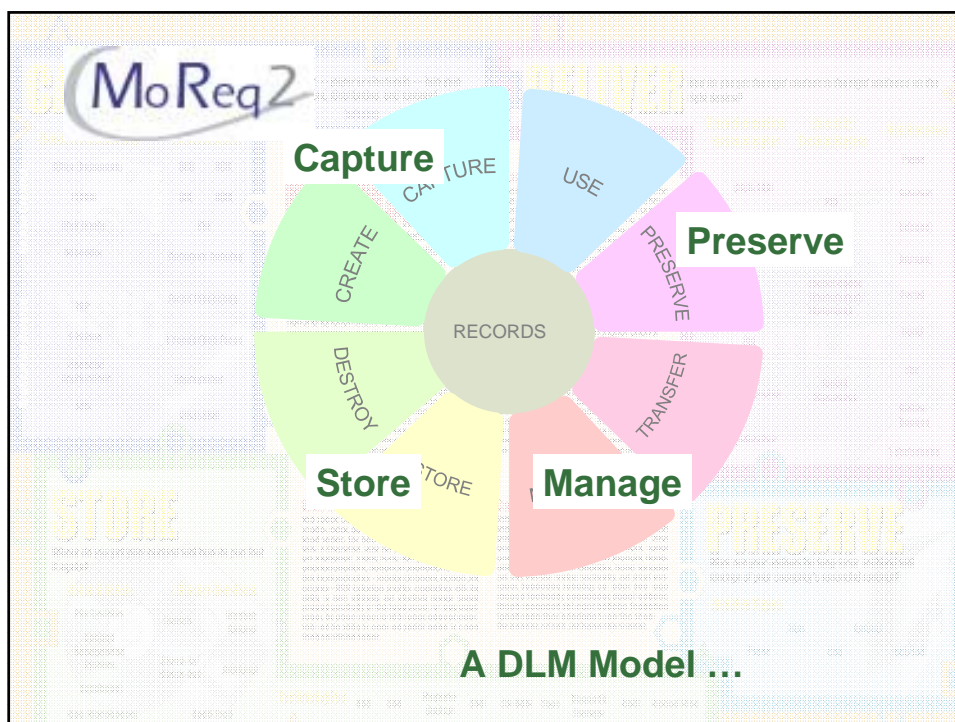
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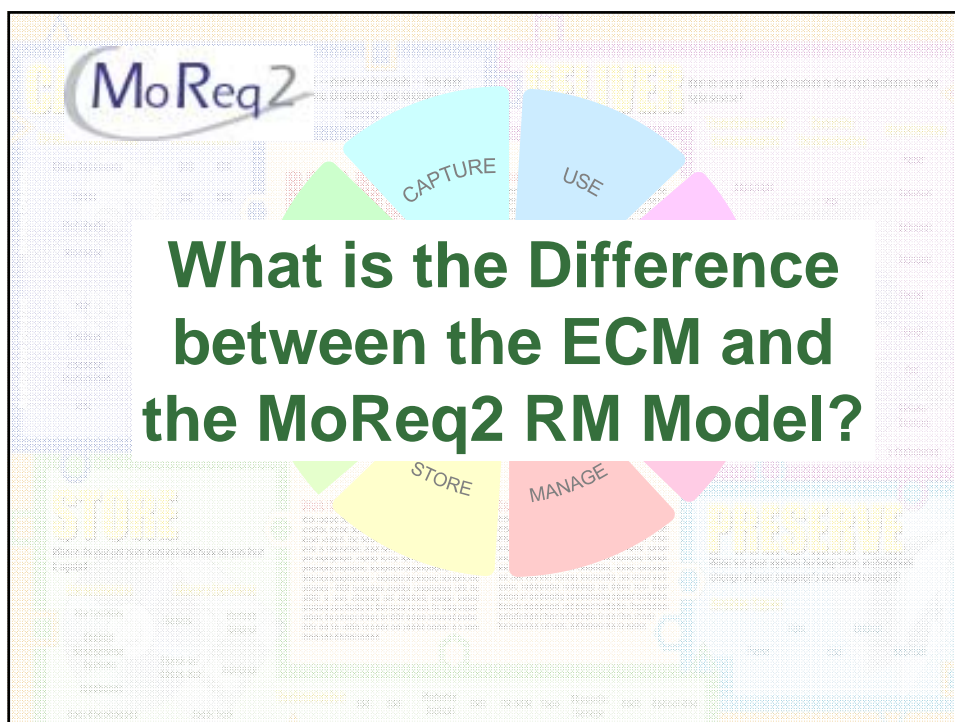
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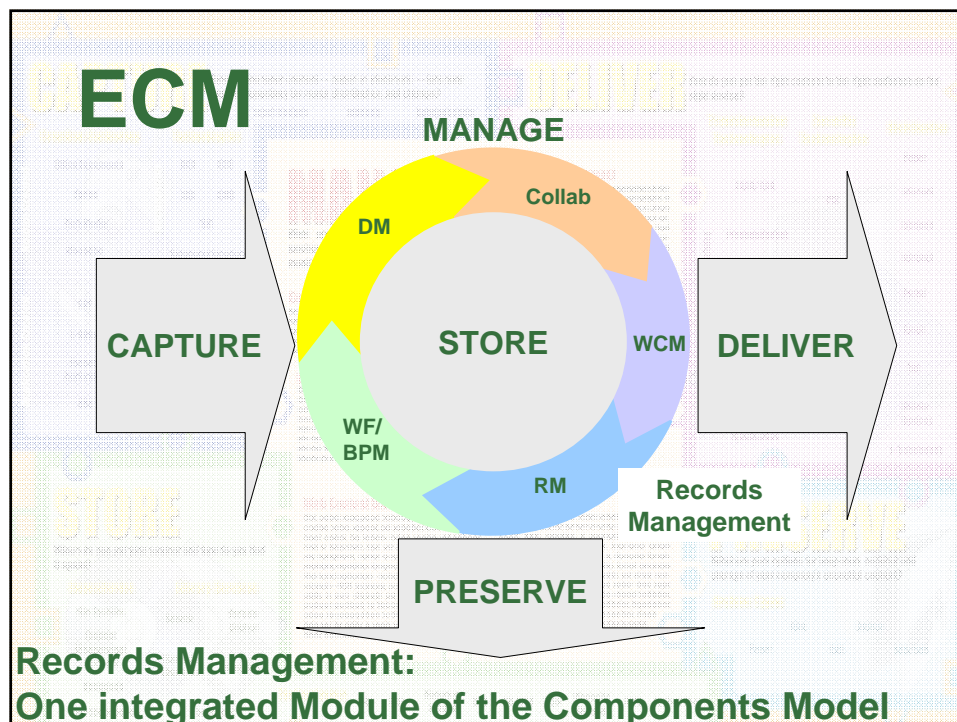
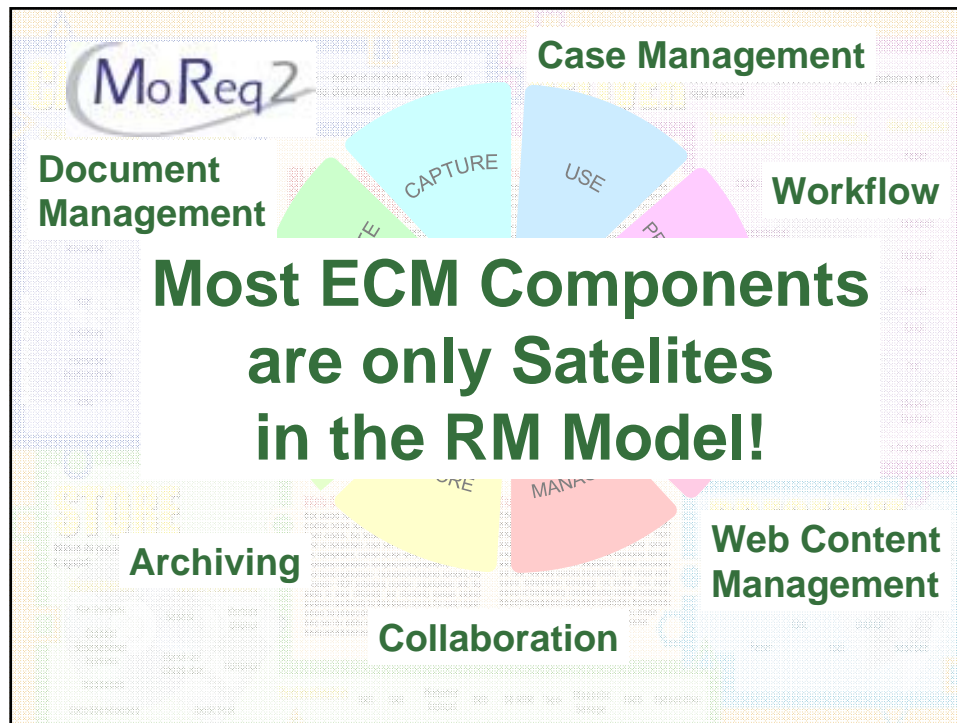


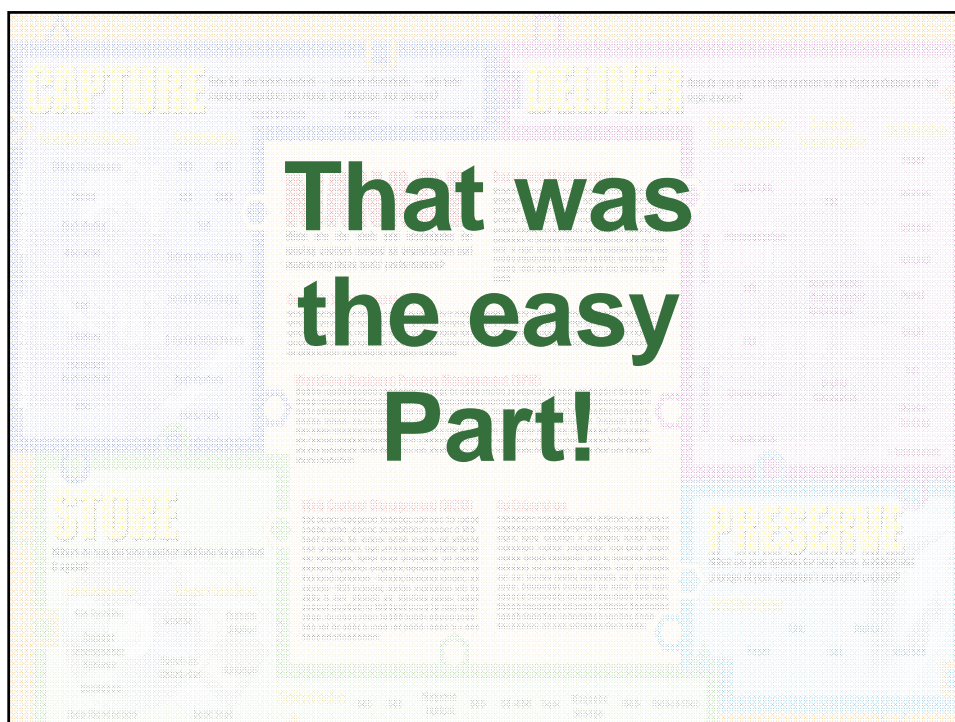


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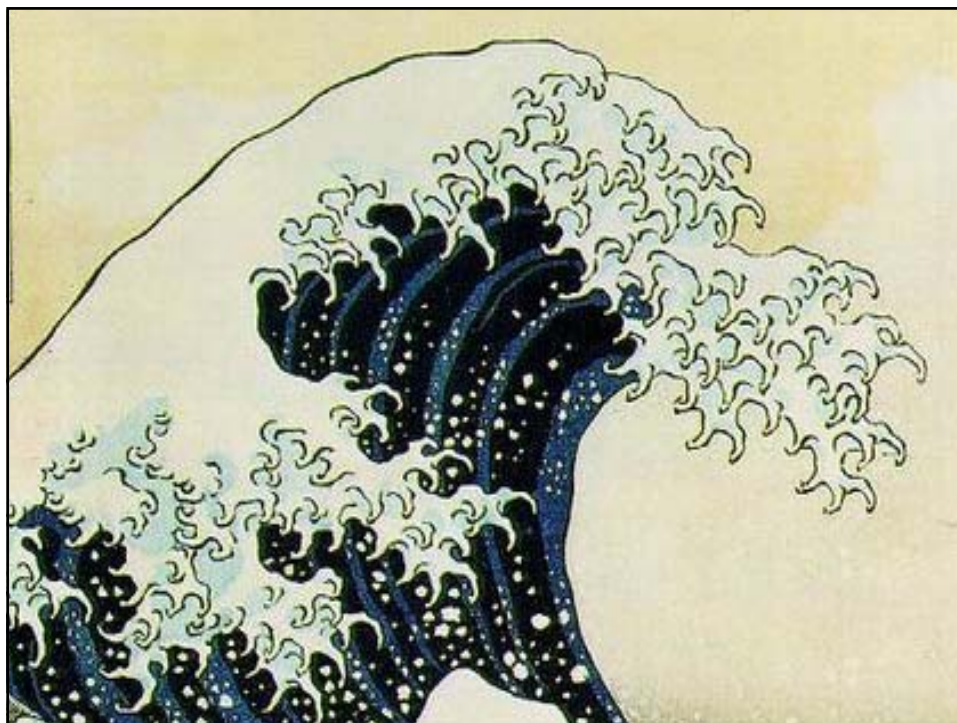




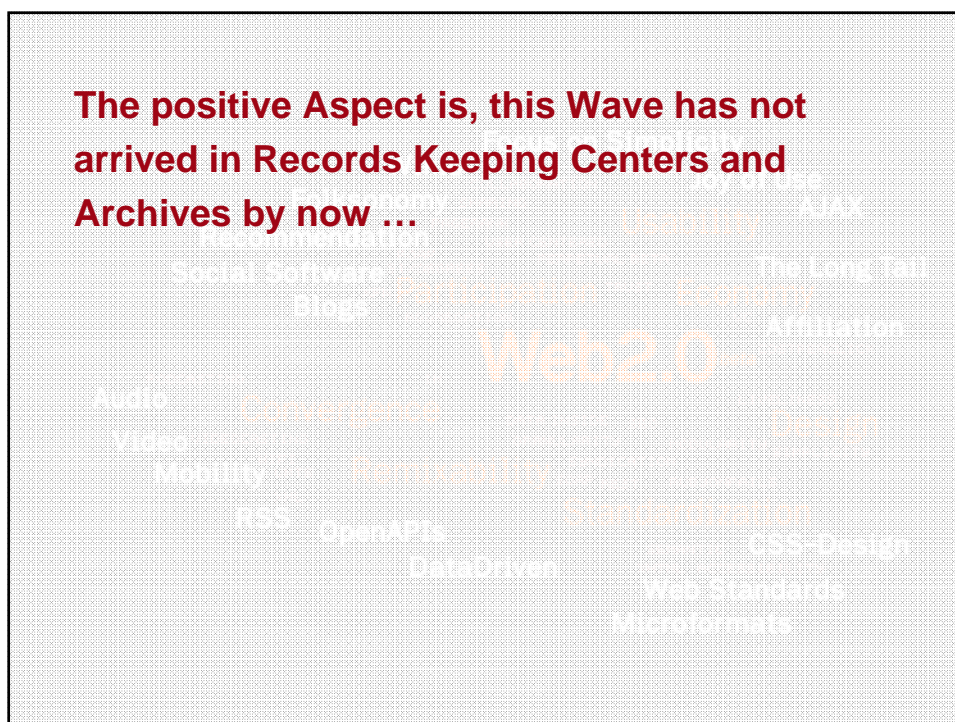








The positive Aspect is, this Wave has not arrived in Records Keeping Centers and Archives by now ...





The Technology Challenge

Most „new“ Technologies do not care to provide Objects suitable to become consistent Records or to be archived properly ...

Think about:

- **Personalisation & Individualisation**
- **Blogs, Twitters, Instant Messages & Wikis**
- **Proprietary Formats for Multi Media Objects**
- **Mashups & distributed Ressources**
- **non-persistent URLs**
- **a.s.o, a.s.o, a.s.o.**

The Technology Challenge

We might even have to come up with the Discussion, again, if we need the Definition of Something like a „Digital Original“



The Cultural Challenge

New Perceptions, how to generate and use information.

Think about:

- **Social Communities**
- **Digital Immigrants versus Digital Natives**
- **„Always Online“**
- **New Ways of Communication and Interaction**
- **Rights Management & Data Protection**
- **a.s.o, a.s.o, a.s.o.**

The Cultural Challenge

We might even have to come up with Discussions, again, about the Information Society and Social Implications of what we are doing.

And not to forget the Digital Addicts ...



The Information Growth Challenge

Exponential Growth of Information and no sufficient „Management“ of Information.

Think about:

- **Uncontrolled Redundancy**
- **The Value of Information**
- **The growing Dependency of the Availability and Accuracy of Information**
- **a.s.o, a.s.o, a.s.o.**

**Lets have a Look
to some special
Records Management
Challenges**



Records Managers love Metadata!
They are used to complex Data Entry Forms.

„2.0“-Users hate complex Data Entry Forms!
They want to trust in automatic
Categorization.

Records Managers are excellent in
structured Search!
They are used to Expert Search Forms.

„2.0“-Users hate complex Search Forms!
They love „Single Field Search“ á la „Google“
finding Everything Everywhere.



Records Managers are aware of the Importance of Context Information!
They are used to spent hours to create orderly Structures.

„2.0“-Users are lazy!

They don't mind where they are storing their stuff.

Records Managers perfectly know to navigate by Tree Views and Folder-Sub-Folder-Volume-Hierarchies!

It's just about having Fun.

„2.0“-Users will loose temper when the Interface doesn't work like a Media Library or Youtube!

Or they get bored and just stop to search what they have been looking for.



Records Managers know about the Importance of Selection and Disposal!

They work until late in the Night to keep their Repositories clean.

„2.0“-Users know, that a 1-TB-Disk at the Grocers Store is now only 300 €

They believe, that there will always be enough Space for Everything.

Records Managers are Specialists in regard to determine the Value of Records!

They are working eagerly, to keep Information accessible and available for all time.

„2.0“-Users have no idea about a record and who might be responsible to store it safely!

Everybody gets Copies of Everything, so Somebody will take care of it.



**Records Managers are fond of their Fileplans,
Thesaurus, Taxonomies, Ontologies and
Classification Schemes!**
**They move even through 7 Levels of Hierarchy
to find the right Spot for a Note.**

„2.0“-Users believe in Folksonomy!
**If there are enough Users choosing the same
Tag, it can not be false.**

**Records Managers are prepared to learn hard
every Function of their RM Solution!**
**With extensive Training every Software Interface
can be turned into a usable Tool.**

„2.0“-Users love their iPod!
**If the User Interface is not sexy and works like
Facebook, they will just shut the Application
down.**



Records Managers know by Heart (or by their Retrieval System) the place of every Object! They are in Control of Everything in the Electronic Realm and in the World of Paper Documents.

„2.0“-Users, the Digital Natives, started living in a virtual World ...

... and the Systems are no longer jailed in their Silicon Cages. With RFID, Robotics, Cameras, Sensors they are entering the Real World and take over Control.

By the Way ...

... a lot of DLM Forum Members are even Senior Digital Immigrants.

... so, are we prepared for all of this?



Will future Historians call our Time

**„The Dark Age of the
Early Information Society“?**

Do not fear Darkness!

**Remember
„The Tortoise & the Hare“**



Do not fear Darkness!

**Remember
„The Tortoise & the Hare“**



Where are we standing now with MoReq2?



Everything is in Place

- Requirements online and printed
- Test Material available
- XML Schema finished
- Test Center Contract signed
- MoReq2 Governance Board established
- Translations & Chapter 0s coming in ...

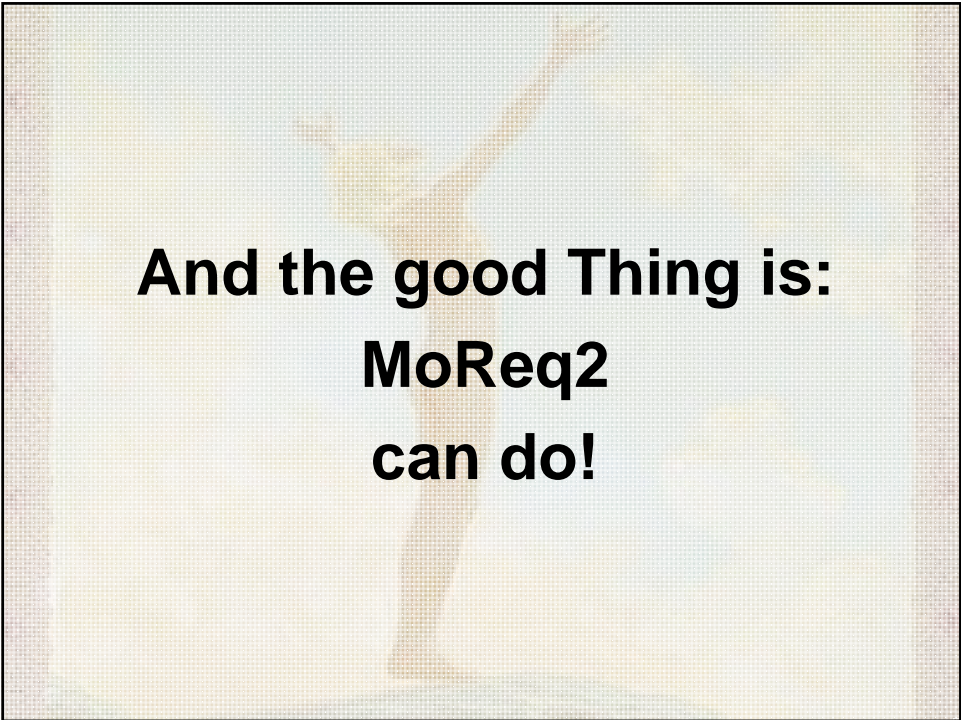
We can start to gather Experiences, initiate Improvements and generate Acceptance.

So what could be the next Steps with MoReq?

... Usefulness

**There is a Need to demonstrate the
Usefulness and Usability of MoReq2:**

- **Even a complex Structure can be easily used with modern Software Architecture, Applications and User Interfaces**
- **Used in the right Way, MoReq2 will help to save Money and to increase Efficiency**
- **Not Everybody will need every Function. Make the modular Approach work**
- **Systems must not only be capable of MoReq2-Functionality, but must be able to support even Office Workers with their daily Work**



**And the good Thing is:
MoReq2
can do!**

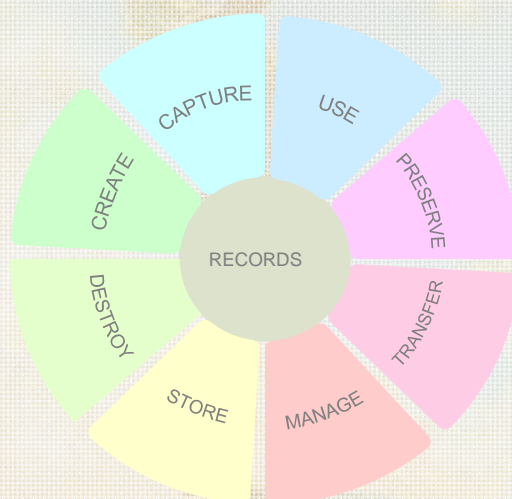


For future Activities ...

... Concentrate on the DLM Forum Assets

Combining the Competences of Archives and Records Management

... a slight Return to the MoReq2 Components Model



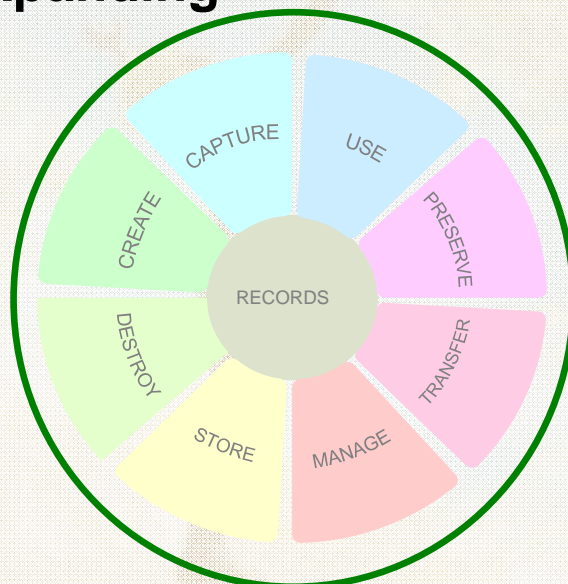
... Archiving

- **Challenge of new formats**
- **Interfacing**
- **other Archive-centric topics**

... Connectivity

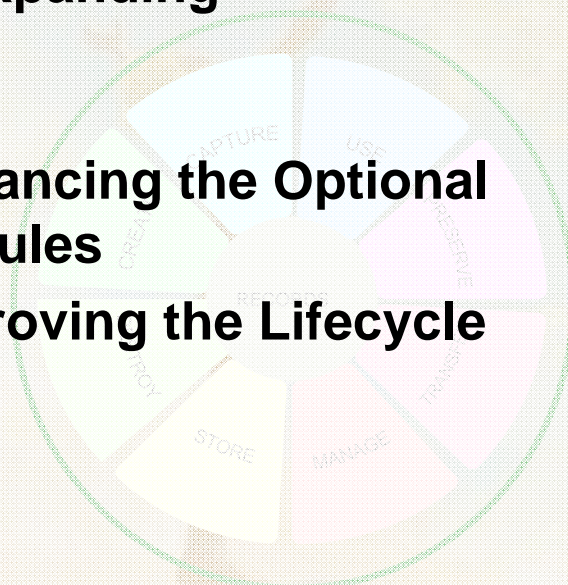
- **Testing the Interoperability and Records Interchange**
- **XML Schema Evaluation in Practice**
- **Pilots**

... Expanding



... Expanding

- **Enhancing the Optional Modules**
- **Improving the Lifecycle**



... Dissemination

- 
- **Training**
 - **Education**
 - **Building Reputation**
 - **Bringing the Message to the Private Sector**

... Maintenance

**We can not do Maintenance only
 of the MoReq2 Standard
 „for ever“.**

**Technology and the Use of Technology
 are changing rapidly!**

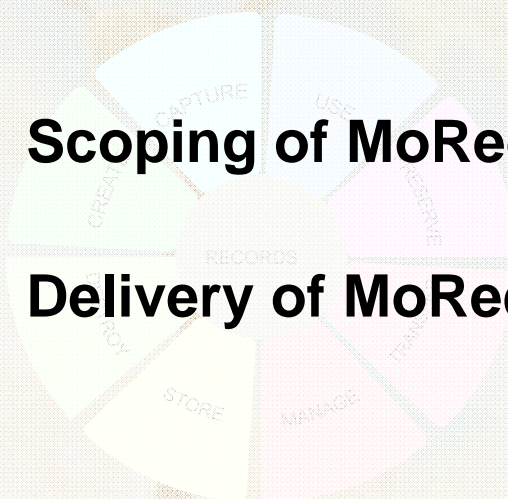
... Paradigms

**We will need a Paradigm Change
in Records Management to
adopt technical and cultural
Change!**

**Or we will see a Paradigm Shift to
Somewhere where we do not like
to be!**

and then ...

- **2010 Scoping of MoReq3 ?**
- **2013 Delivery of MoReq3 ?**





**... and with the next
Version we have to
break the Barriers of
traditional
Records Management!**



... could be ...



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Thank you very much for your Attention!

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