

MoReq2010 – a light-hearted view

As I hope you know, a consultation process is currently (August 2010) under way for a new electronic records management standard, to be known as MoReq2010. MoReq2010, the successor to MoReq2, has the potential to be very important indeed – and yet the consultation seems to have been virtually ignored by the records management community – worldwide, only 30 people have contributed! Please add your expertise to this consultation at <http://contribute2moreq.eu>.

The “Security rating and compliance” Proposal

One of the more “amusing” proposals on the portal currently is a scoring system for so-called “security rating” (actually, it is not a security rating at all, it is some kind of arbitrary and non-linear measure of flexibility, but that is a detail). The proposal is to “rate” electronic records management systems (in 5015.2 terminology: RMAs), according to the following scheme:

Rating	Requirement	Number of roles supported
1 star (lowest) 	The ERMS supports the user role and the administrator role as defined by MoReq2010; roles are system wide and not time limited	2
2 stars 	The ERMS supports the default user and administrator roles and allows role assignment to single entities as well as time limited role assignment	2
3 stars 	The ERMS supports the default user and administrator roles plus additional built-in roles that are pre-defined by the supplier and are not configurable	At least 6
4 stars 	The ERMS supports user and administrator roles plus the creation and limited configuration of additional roles by users on an implementation-by-implementation basis	At least 12
5 stars (highest) 	The ERMS flexibly allows an effectively unlimited number and variety of new roles to be created and these may be configured using any combination of the functions defined by MoReq2010	Unlimited

At first, I did not like this idea...

IN fact, my first reaction was to award this proposal a rating of “5 Black Blobs” on the Fresko “utility rating scale”, which is:

Rating	Explanation
3 green ticks (highest) 	An extremely good idea, worth making great efforts to implement
2 green ticks 	A very good idea, worth implementing
1 green tick 	A good idea, worth considering
1 black blob 	A poor idea, not worth considering
2 black blobs 	A very poor idea, not to be implemented
3 black blobs (lowest) 	An extremely poor idea, worth making great efforts to prevent and avoid

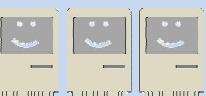
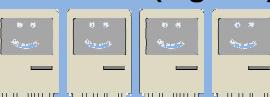
*(You may notice that my proposed rating, **5 blobs**, is off the scale – that is intentional.)*

My second thought was, however, that this rating idea shows great promise. It is extensible. It is factual. It is arbitrary. And, like many of the Parts of consultation 1, it confuses users by making certification results even more complicated. So, MoReq2010 obviously will be even more complex (and therefore better) if this concept is taken further. So the MoReq2010 team should **add more ratings**, perhaps something like the following examples:

Classification “Tree” Rating

Rating	Explanation
1 Tree (lowest) 	Supports a maximum of 3 levels of classification in a hierarchical classification scheme
2 Trees 	Supports a maximum of between 4 and 6 levels of classification in a hierarchical classification scheme
3 Trees 	Supports between a maximum of between 7 and 10 levels of classification in a hierarchical classification scheme, and allows administrators to prune branches
4 Trees (highest) 	Supports an unlimited number of levels of classification in a hierarchical classification scheme, and allows administrators to graft branches

Operating System “MacGrin” Rating

Rating	Explanation
1 MacGrin (lowest) 	Supports one operating system and database system
2 MacGrins 	Supports at least two operating systems, but only one database system
3 MacGrins 	Supports one operating system and at least two database systems
4 MacGrins (highest) 	Supports more than two operating systems and more than two database systems

Email integration “Happy Mailman” Rating

Rating	Explanation
1 Unhappy Mailman (lowest) 	Does not support e-mail integration
2 Happy Mailmen 	Supports integration with one email client and/or server
3 Happy Mailmen 	Supports integration with two email clients and/or servers
4 Happy Mailmen (highest) 	Supports integration with more than two email clients and/or servers simultaneously

...and so on. With a bit of work, we could extend this comic-strip evaluation idea even more!

The original consultation proposal allows for only a *relatively* small number of kinds of certification, say about 2,000 for ease of reference (because of the combinations and permutations of the modules and pluggy things). Adding the five-star “security rating” makes that 10,000 possibilities. But adding the above ratings increases that to 800,000 possible certification results - just about enough to make it opaque to users, I think.

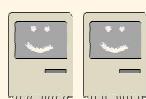
But vendors should like the result, namely a specific certification result that cannot be compared meaningfully to the certification of competing software, something like:

MoReq2010 *Compliance Certificate*

Whizzo WonderRecs software is certified to comply with MoReq2010 version 2.2 with hierarchical classification v2.0, electronic case files v2.7, physical files v1.1, compound documents v2.4, GUI v2.0, API v2.5, eMail v2.0, scanning v1.0 and external records v1.7 (test data versions available on request), and scored as follows on the DLM Forum’s test scales:



Three stars for “security rating”



Two MacGrins for operating system rating



Four trees for classification rating



Three Happy Mailmen for email integration



Marc Fresko