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EDRM in the Public Sector

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Our aims for EDRM

To support public business by:

- **Underpinning e-business by managing operational records as an operational resource:**
- **Facilitating the knowledge economy by sharing e-records as a knowledge asset**
- **Securing access regulations by robust access controls**
- **Maintaining evidential value by preventing unauthorised change**



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1997-2007 a changed landscape

- 1997 Initial guidance are published
- 1999 PRO publishes 1st functional requirements for ERM
- 2000-2002 – testing solutions
- 2002 – Revised requirements published
- 2003-2006 testing and approving solutions
- 2007 EC sponsors MoReq2
- 2007 – 2008 TNA works to define **next generation needs**



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Impact of ERM testing

Benefits:

Credible & rigorous scheme

- **approx 48% were not approved**

Significant number of compliant solutions

- **20 products approved**

Ongoing process of product development

A maturing market – consolidation apparent

Informed TNA of limitations of current requirements



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Scope for improvements

- interoperability – exporting & importing
- desire to define mandatory form of metadata content
- need for customisable additional entities to enforce closure for disposal execution
- integration with content management systems & wikis & blogs
- proposal for a new XML schema & proof of concept testing



MoReq2 aims to consolidate and build upon existing national standards.

- **Important areas for enhancement are:**
 - Controls on access to facilities
 - Retention schedules and disposal
 - Export and transfer
 - Preservation
 - Definition of metadata



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MoReq2 - additional modules

- content management (e.g. integration of ERM with ECM);
- management of non-electronic records and hybrid files;
- workflow and case-work;
- document management and collaborative working;
- encryption, watermarking etc.
- interoperability and openness
- distributed systems



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Key Issue: Base Module

The base module constitutes the minimum necessary to:

- **provide credible electronic records management.**

Important areas for enhancement are:

- **controls on access to facilities**
- **retention schedules and disposal**
- **export and transfer**
- **preservation**
- **metadata**



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Compliance Testing

- to evaluate software products against MoReq2
- standard test scripts
- to support consistent evaluation of compliance through testing
- a compliance testing regime will be for the DLM Forum to devise on the basis of MoReq2



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Moreq2 - next steps

- Publication of MoReq2 in April 2008
- The DLM Forum is examining options for a compliance testing regime
- Provision of TNA support via expert advice and peer review and status and continuing relevance of TNA requirements (TNA 2002)



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Engaging the end user – shaping future EDRM

TNA is researching the following issues:

- **Cost of solutions & potential of shared systems**
- **Improving usability for end users**
- **Governance v enabling**
 - **Auto-capture**
 - **Auto classification**
- **Defining the architecture of next generation of EDRM and links with line of business systems**



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