What is in MoReq2?

- **Overview**
  - Useful for senior management

- **Requirements**
  - 794 formal requirements
  - Functional & non-functional

3.1.5   The ERMS must allow man
role only, subject to require

*In this requirement, "mana
and section 3.4.*

3.1.6   The ERMS should allow n
roles] and/or by a specifi us

*In this requirement, "mana
3.1.5. This is intended for t*
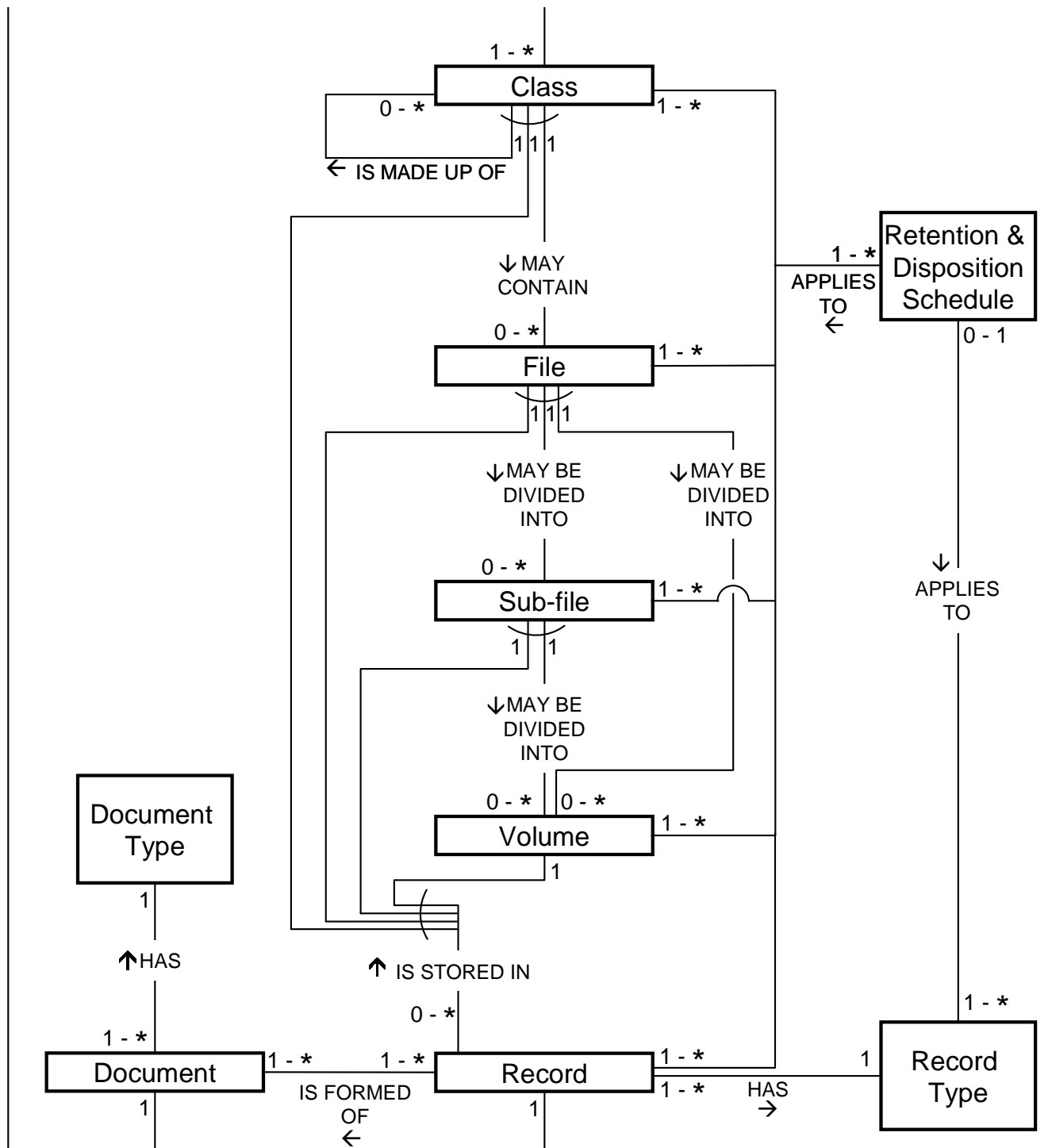
   ♦   *large classification sche
which therefore have c
management for the lov*

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What is in MoReq2?

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- Reference model
  - Glossary
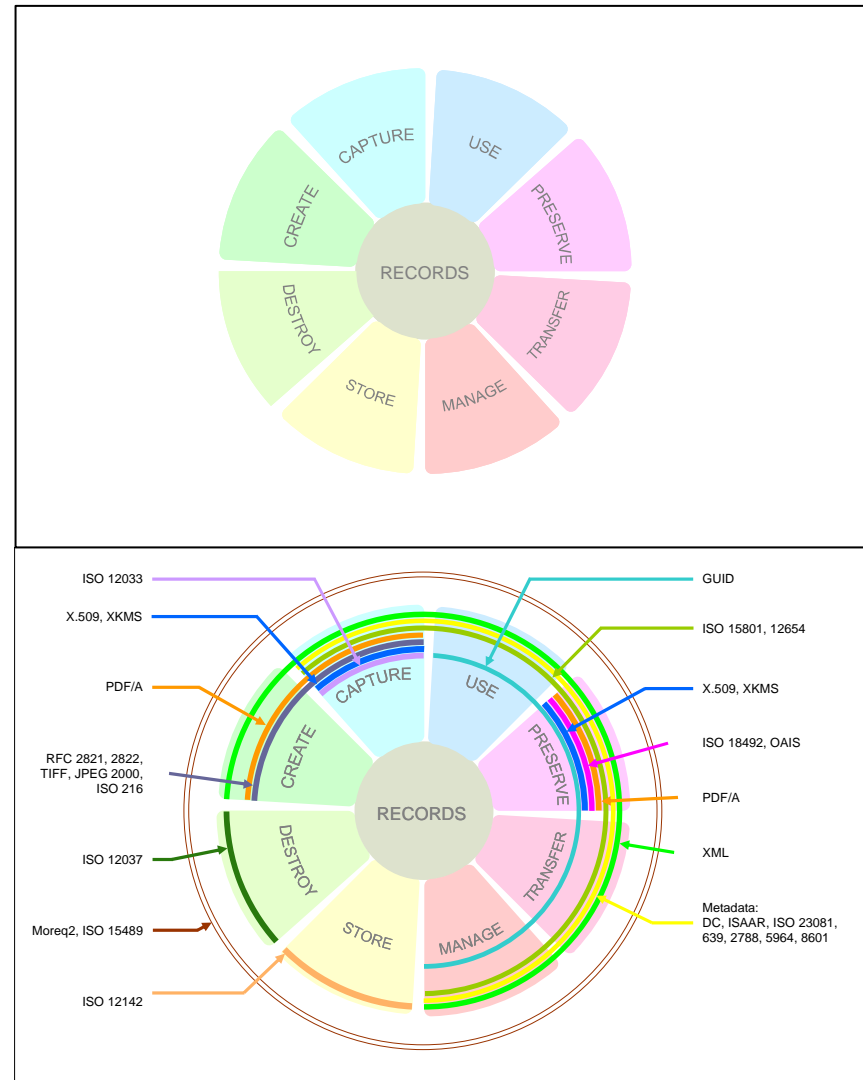 - Entity-relationship model
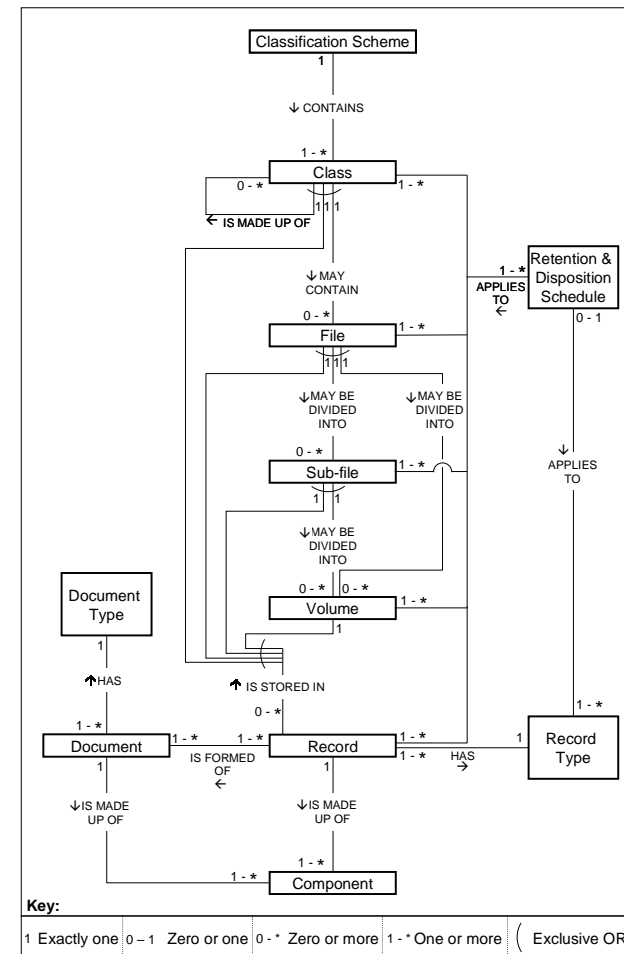
- References

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  - Entity-relationship model
- References
- Standards
- Metadata model
  - About 160 metadata elements

Example of MoReq2 Metadata definition

M047: Description.abstract.description

	Obligation:	Optional	**Occurs:**	Once	
Definition:	A textual description of the entity and its relevant content.				
Applies to:	class ✔	file ✔	sub-file ✔	volume ✔	record
Populated:	Manually entered when the entity is created.				
Source	User.				
Default	None.				
Inheritance	None.				
Use conditions:	Can be changed by users who have appropriate access rights.				
Comment:	For classes and files, also known as "scope notes" – narratives intended to clarify the intended contents and/or exclusions of classes and files for the benefit of users. Also known as description. For e-mail value can be taken from RFC 2822 header field "comment" if present (at the time of writing it is rarely used).				
Requirements	3.1.10				

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Also...

Countries will add their own "chapter zero"

- Terminology

- National laws

- National regulations and standards

- **DLM Forum plans to ensure that chapters zero do not contradict MoReq2**

◆ Poglavje nič

◆ hoofdstuk nul

◆ chapitre zéro

◆ Kapitel null

◆ κεφάλαιο μηδέν

◆ capitolo zero

◆ capítulo zero

◆ глава нул

◆ capítulo cero

◆ fejezet zéró

◆ luku nollata

الفصل الصفر ◆

MoReq2 contains several enhancements

Records management

- Sub-files, case management

- Distributed management

- Mobile working

- New forms of information

- Preservation

- Export, import, transfer

- Disposal hold (legal hold)

- …

Additional to records management

- Workflows, usability

- Content management integration

- Digital rights management

- Collaborative working

- …

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MoReq2 is modular

- MoReq2 consists of "core module" plus 13 "optional modules"

- Core module contains "pure" records management requirements

- Optional modules contain functionality that is needed by many when managing electronic records, but is not strictly records management

- Compliance with MoReq2 will require compliance with all core module mandatory requirements; compliance with optional modules will be optional
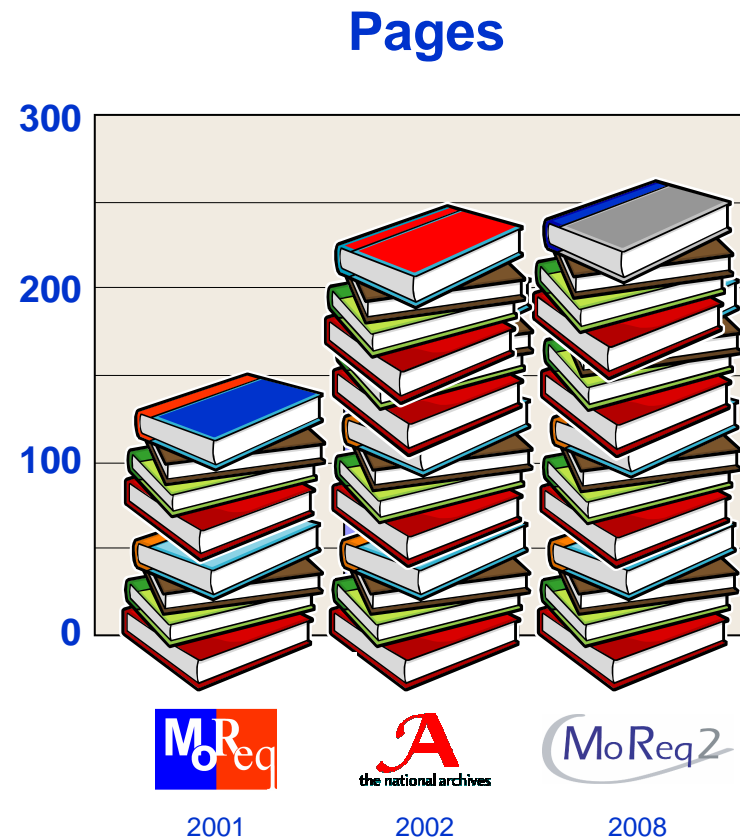
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Core module contains

- Classification Scheme and File Organisation

- Retention and Disposition

- Controls and Security
  - Includes management of Vital Records

- Retention and Disposition

- Capturing and Declaring Records
  - Includes e-Mail Management
  - Includes Scanning and Imaging
  - Includes Bulk Importing

- Referencing

- Searching, Retrieval and Presentation

- Administrative Functions
  - General Administration
  - Reporting
  - Changing, Deleting and Redacting Records

Optional modules

- Management of Physical Files and Records

- Disposition of Physical Records

- Document Management and Collaborative Working

- Workflow

- Casework

- Integration with Content Management Systems

- Electronic Signatures

- Encryption

- Digital Rights Management

- Distributed Systems

- Offline and Remote Working

- Fax Integration

- Security Categories

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How big is MoReq2?

Pages

Excluding metadata model

MoReq2

- Developed by imbus AG (Germany)

- Now available at
  www.more2.eu

- Testing scheme later this year, run by DLM Forum – Serco not involved

- Will allow buyers of systems to choose MoReq2-compliant software

- Software companies are already working on compliance

T3.1.3.4   The Export of a Classification Scheme and Selected Audit Trail Data

I. Global test case information

test case id:	T3.1.3.4
test case priority:	☐ Mandatory ☒ Optional ☐ Not Testable
test case description:	An administrative role exports a classification scheme with all its audit trail data. Ensure that this export includes all audit trail data. The administrator exports the classification scheme again, just taking selected audit trail data into account.
Req-ID:	3.1.20

II. Test case

a. precondition(s)

- The ERMS supports the export of all or parts of the classification scheme (see test case T3.1.3.1)
- **TestclassificationScheme7** is created.
- For testing purposes an external target folder …/**export** is created.
- logged in as the role **CentralAdministrator**

b. test steps

step	action/operation	Check/ expected result
1.	Export classification scheme **TestclassificationScheme7** and all its audit trail data to the folder …/**export**	**TestclassificationScheme7** is exported. All records of **TestclassificationScheme7** are still stored in the ERMS.
2.	Analyse the output of the export	The export includes the audit trail data to **TestclassificationScheme7**
3.	Export classification scheme **TestclassificationScheme7** and just a part of the audit trail data to the folder …/**export**	**TestclassificationScheme7** is exported. All records of **TestclassificationScheme7** are still stored in the ERMS.
4.	Analyse the output of the export	The export includes the selected part of the audit trail data to **TestclassificationScheme7**

c. postcondition(s)

- The ERMS ensures that an export of a classification scheme includes all audit trail data.
- The ERMS allows an administrative role to select which audit trail data are included in the export of a classification scheme.

III. Test result

defects / deviations	verdict
	☐ passed
	☐ failed
Remarks	tester
	date, signature

3	API					
3.1 3.2 3.3	<RDSc03>	Rds_Test3c_ new	Destroy after authorisation from an administrative role	1 years	e	of s
	<RDSd01>	Rds_Test1d	Present for review	1 year	e	
	<RDSd02>	Rds_Test2d	Present for review	1 year	e	
	<RDSd03>	Rds_Test3d	Present for review		<date>	No	Test3