

PAULO MAIA PRESENTATION – CAIXA ECONÔMICA FEDERAL - BRAZIL

I – THE BRASÍLIA PROTOCOL

- ✓ What is the document for interoperability standards of electronic government - e-PING
- ✓ The Justifications for this protocol
- ✓ The Opportunities
- ✓ The Messages behind the protocol
- ✓ The next steps

▪ BRASÍLIA PROTOCOL

PUBLIC PROTOCOL OF INTENTION FOR ADOPTING OPEN DOCUMENT FORMAT

Art. 1 – In accordance with the recommendations proposed by the Federal Government through the reference document for interoperability standards, e-PING, and in order to work in a cooperative manner in the application of solutions that generates higher technological and economic independence for the Treasury, the agencies and entities of Direct and Indirect Public Administration, including State-owned Companies and Foundations, as well as private companies, listed below, propose adopting open file formats for the creation, storage and digital provision of documents of the text, spreadsheet and presentation types.

Art. 2- Open file formats are understood as those that:

I – allow interoperability between the different applications and platforms, internal and external;

II – allow applications without any restrictions or payment of royalties;

III – may be implemented fully and independently by multiple vendors of computer programs, in multiple platforms, without any cost related to intellectual property for the necessary technology;

Art. 3 – Editable office documents are understood as editable electronic documents typically created and handled by computer programs known as office suites. These documents are typically texts, spreadsheets and presentations.

Art. 4 – By voluntarily adopting this protocol, the entity pledges to:

4.1 - Promote the dissemination and use among its employees of the tools required for the adoption of the OpenDocument Format (ODF) office document format, Brazilian standard ABNT NBR ISO/IEC 26.300:2008, preferably in solutions based on free software.

4.2 - Present to the other entities that are signing this protocol and to society through CISL – Committee for Deployment of Free Software, within 60 days, the necessary planning to achieve the following goals:

- a) Have its technology environment ready to handle editable office documents in the ODF format.

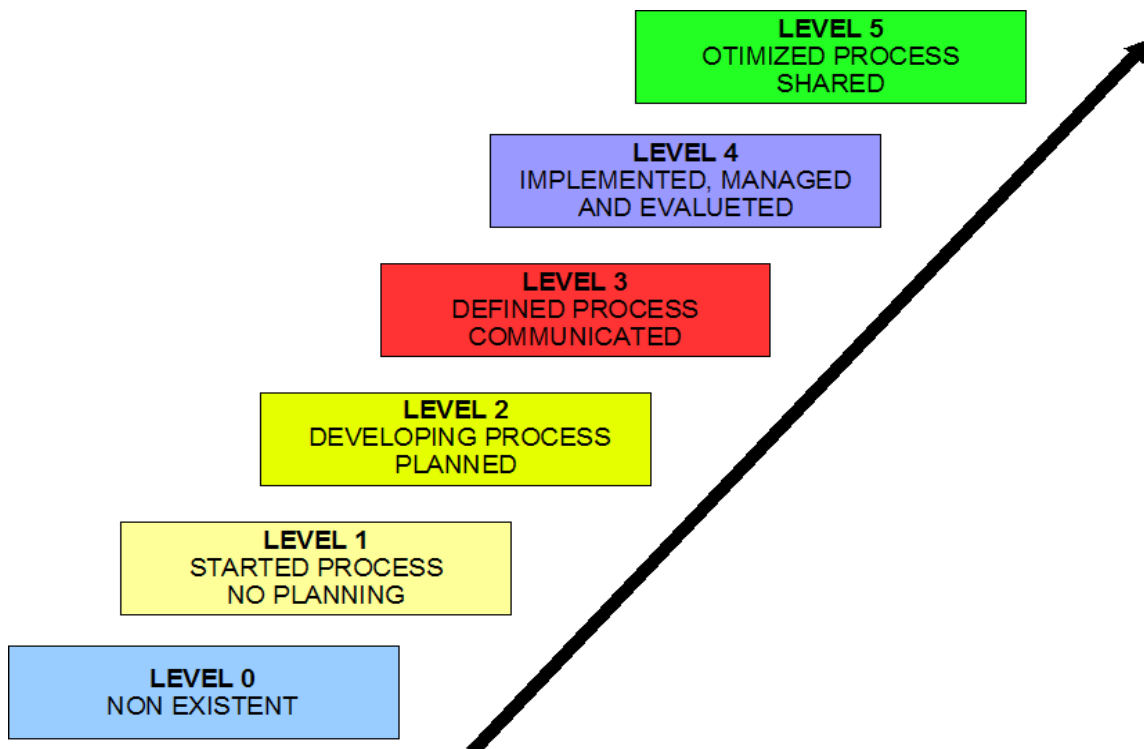
- b) Be ready to receive editable office documents in the ODF format.
- c) Use the ODF format, preferably, for editable office documents that will be made available to society.
- d) Exchange editable office documents with the other entities signing this protocol through the ODF format.
- e) Use the ODF format to create, exchange and store editable office documents generated by the entity.

4.3 - Share with the other entities that sign this protocol solutions that may accelerate the adoption of the ODF format.

II - ODF ADOPTION MATURITY MODEL

The objective of this presentation is to suggest the use of a maturity model to trace the ODF adoption process. As the others models have already been using for some organizations, to measure the level of adherence of their process to a specific model, such as CMM, COBIT and ITIL. So this approach will set the levels, their characteristics and their indicators. It can helps the companies to adopt the ODF in their environment and share their experience with others companies and it will accelerate the adoption process in the world.

Using the most common approach of the maturity models, the idea is to set six level of maturity, as expressed in the figure below:



LEVEL 0 – NON EXISTENT

- There is no process of ODF adoption
- ODF standard document is not used in the organization.
- The enterprise directors don't recognize the needs of ODF standard utilization.

- There is no edition solution for ODF files installed in the organization equipments.

LEVEL 1 – STARTED PROCESS – NO PLANNING

- The enterprise strategic management doesn't know the Government Open Standard Policy.
- The use of IT solutions and documents compliance with ODF standard, is started by individual initiatives.
- The IT Team recognizes the needs of ODF adoption, although testing are been started, there are not a structured project.

LEVEL 2 – DEVELOPING PROCESS – PLANNED

- The strategical management guides feasibility studies for ODF use in the organization.
- The individual and informal initiatives of use involve other departments beyond IT.
- The IT department starts the use of solutions and documents adherent to standard ODF and qualification of the support team.
- The IT team elaborates a structured project for all the organization.

LEVEL 3 – DEFINED PROCESS – COMMUNICATED

- The strategic management defines one policy for adoption of standard ODF in all organization.
- A structured project is approved and official noticed for all the organization.
- The IT area defines standardized solution for ODF document edition for all the organization.
- A corporative solution for users and technician qualification is implemented.

LEVEL 4 – IMPLEMENTED, MANAGED AND EVALUATED

- The structure of maintenance and support for the users is implanted in the organization.
- The IT users are trained for use of the ODF document edition solution.
- All users' equipments of the organization have ODF document edition solution installed.
- The business managers are acquired knowledge on the ODF adoption policy for the organization.
- The use process is divulged and monitored.

LEVEL 5 – OPTIMIZED PROCESS – SHARED

- All the strategic managers have knowledge of the ODF implementation project .
- All the documents generated at the organization are compatible to ODF standard.
- The organization collaborates with the communities of the government and other communities of support to standard ODF.
- The organization is adherent to the recommendations on ODF standard of e-PING.

INDICATORS:

- Existence of organizational strategy to ODF Adoption Policy.
- % of equipment with ODF solution installed.
- % of business employees trained.
- % of IT employees trained for ODF solution support.
- % of organization departments using ODF solution.
- % of documents available for society in ODF standards.