

Preserve365® Professional (Version: P1)

Preserve365® Professional (Version: P1) enables organizations to standardize and streamline the secure archival transfer & continued digital preservation of long-term and permanent born-digital and digitized records held in SharePoint.

It makes **Active Digital Preservation™** part of the Microsoft 365 experience so inactive, legacy and copies of important active long-term records can be easily found, read, trusted & used in 10, 20, 30, or even a 100 years' time. Preserve365® is part of the Microsoft 365 experience, extending Microsoft's information management capabilities, enabling transfer, search and rendering features to be accessible directly in SharePoint for a simpler user experience.

Preserve365® Professional (P1) includes:

- Archiving & preservation for SharePoint Online.
- Access to Preserve365 menus in SharePoint for manual archiving, & preservation.
- Access to Preserve365 menus in SharePoint for search, view and download of information in the archive.
- Access to Preservica Archive for non-archival administration (search, view, download and deletion)

Information about enhanced capabilities in P2 versions and above are available upon request.

Hosting & Licensing

- Preserve365 Professional is multi-tenanted Microsoft Azure application available in USA & UK regions
- SharePoint Online only
- Installed as an SPFx enterprise application
- Available with E3/G3/A3 or Business Premium Microsoft 365 licences
- Licensed for one SharePoint tenancy linked to a single Preservica Professional Plus tenancy
- Up to 3 Preservica Archive Administrator users for non-archival administration– e.g. Subject Access Deletion requests.
- Access to Preserve365 embedded menus in SharePoint for manual archiving, preservation & retrieval by the Archives or Records team.

- Access to Preserve365 embedded menus in SharePoint for manual archiving, preservation & retrieval by up to 300 managed-users within your organisation.

Preserve365 for Microsoft 365

Preserve365 provides the archiving and digital preservation of SharePoint lists, libraries, folders & files

- Archival Transfers (Preserve365 Move & Copy)
 - Archival transfers are managed using Preserve365's embedded Move & Copy functionality
 - Preserve365 Move transfers files and/or folders in SharePoint to the archive and triggers a SharePoint delete action to remove files and/or folders from their SharePoint library location
 - Preserve365 Copy transfers files and/or folders in SharePoint to the archive whilst leaving retaining the SharePoint copy in place
 - Both copy and move functions can be applied to:
 - Document libraries
 - Lists
 - List items and attachments
 - Folders (single & multiple)
 - Libraries, lists and folders can be transferred more than once. Duplicate files are skipped but new additions will be added to the Preservica Archive

- Records (single & multiple)
 - These items can currently only be transferred once.
 - Failed or partially-complete file transfers will result in a visible warning in the Preserve365 status marker.
 - Transfers can be retried from the point of failure except for:
 - Cannot find retention policy errors
- Metadata
 - Metadata is transferred from the SharePoint item to the Preservica Archive, including SharePoint custom columns, and preserved
- Search and view functionality
 - A full text index of preserved items is returned to SharePoint for search capability
 - By default users can search at the root level of the tenant for preserved items
 - To search at the site level, users can setup a search vertical in SharePoint that returns archived items
 - Users can render the access representation of a preserved item either from the search results or 'Archive' flyout
 - Users can observe the metadata properties preserved with the content
 - The organizations own access & security permissions are maintained & persisted so the users or Groups who could access the file at transfer, can still access it from search
- Download functionality
 - Users can download any of the below from the renderer screen:
 - Access representation
 - A copy of the file in its original format.
 - Preservation master
 - File properties (.json)

Preservica Archival Storage

Preservica stores content within Microsoft Azure storage systems. This provides the following functions:

- Trusted digital preservation in the cloud aligned to NDSA & OAIS
- Use of Azure Hot Blob to hold digital assets (files) for fast, frequent access
- Save files to multiple servers in multiple data centers within a given region
- Encrypt content stored in Azure
- Isolation of content in Hot Blob to store the content
- Integrity checking of all objects held in storage
- Checksums calculated on storage for each copy
- Confirmation that when a file is accessed, it is the same as the file loaded in ingest using its own checksum (choose from MD5, SHA-1, SHA-256, SHAR-512)

Active Digital Preservation™

Preservica's unique Active Digital Preservation™ continuously protects your long-term data from file format obsolescence, automatically bringing data back to life and keeping it in always readable formats. The following functions are available:

- Preservation actions on upload
- Transformation of files on upload to preservation & access formats
- Instantly view hundreds of formats
- On-going automated transformation of files to recommended formats
- Uses File Format Registry based on the UK National Archives' PRONOM database
- Utilization of the growing list of file formats recognized (more than 1700) and migration pathways
- File Format Migrations
 - Automated migrations including post migration verification of component-level essential characteristics
 - Automated creation of new "Digital Master" preservation copies
 - Automated creation of quality presentation copies used for dissemination
 - Automated migration of multi-part asset such as multi-page TIFF to multiple JPEGs and PDF to multiple JPEGs. This allows all pages to be rendered in the multi-image gallery renderer and enhances the viewing experience
 - Standard tools provided
 - Identification / Characterization: DROID 6.3 and signature file v94, JHOVE 1.20 (JPEG, PDF, HTML, JPEG2000, AIFF, XML, TIFF, GIF, PNG), Native XML validation only), Media Info (for audio and video formats), FiWalk (for disk images), ExifTool (for MS Office OLE formats and other image formats e.g. Canon RAW), Apache POI (MS Office OpenXML formats validation only), Native Java (for OpenDocument formats and MS Office OpenXML formats property extraction only)
 - Migration: Libre Office (various office formats to OpenDocument formats, PDF, PDF/A and various vector graphics formats to SVG and PDF), Imagemagick (most image formats), FFMPEG (various AV formats), Handbrake (for video)
- Retention and disposition of records:
 - Manual 2 stage deletion at disposition of file in the archive
 - Automated transfer of SharePoint Retention Label and disposition metadata
 - Ability to manually create retention rules in the Preservica Archive to match SharePoint Retention Labels to enable users to apply the same retention duration and file disposition plan to the preserved asset
 - Ability to manually delete at disposition file in the archive using 2 stage delete

Reporting

- Preserve365 Audit log enables authorized users to see and export in a CSV format a list of all actions Preserve365 has carried out on SharePoint items shown by:
 - Event time
 - PreservicaID
 - Asset name
 - Original file path
 - Username
 - Event type
 - Message
- Access in Preservica is given to standard Preservica reports produced in PDF, XML or CSV formats:
 - Ingest reports
 - Access reports
 - Data Management reports
 - Preservation reports
 - Administration reports
 - Proof and authenticity reports
 - And more

Preserve365 Security & Administration

- Developed with Microsoft for security assurance
- Uses fully maintained Microsoft data permissions (ACL)
- Roles & users managed in Microsoft Entra
- Role based Microsoft 365 access controls govern users access to Preserve365 functionality including ability to move or copy content to the archive
- Users of Preserve365 are authenticated against a customer's Azure Active Directory using Microsoft MSAL libraries
- Access to Preserve365 user interfaces is managed by MSAD SSO
- Data is encrypted at rest & in transit to protect customer data and archived assets
- Access to archived content and reports are controlled using Microsoft Access control lists (ACLs)
- Preserve365 Administration
 - SharePoint Site Management allows users to search for and set which sites Preserve365 can operate in to provide some seclusion of its reach in a SharePoint tenant

Preservica Archive Access and Administration

- View the files and all metadata (description and audit trail) for any asset
- Explore the collection hierarchy, drilling down to information objects of interest
- View technical metadata for files
- Thumbnail preview of files (for selected file formats)

- Download any asset or selected part
- In-browser rendering to view, listen or play content without having to download the file including images, office formats, emails, social media posts, web pages, captioned videos, and the rendering of 3D assets
- Search tools including:
 - Full text search of permitted file formats and metadata
 - Logical search functions (AND OR NOT etc.)
 - Fielded searches incorporating searching over any registered descriptive schema
 - Limit search to within a selected folder
 - Export search results into CSV for custom reporting on metadata
- Trigger 2 stage delete workflows for specific asset(s)
- User Administration:
 - Preservica credentials are provided to authorized users
 - Log-in using 2-Factor Authentication
 - User Management & Authentication
 - Create and suspend users
 - Create up to 3 Administration Users
 - Users requested new password

Onboarding, community & support

- Access customer support and on-demand training as well as community support, best practice & knowledge.
- No lock-in – get your content & metadata back at anytime
- On demand training courses & resources
- Online Community for support & best practice advice
- Direct access to technical support



Security & Administration

- Includes a set of standard reports:
 - Ingest history
 - Access
 - Preservation
 - Administration
 - Security and compliance
- Administration:
 - Manage schemas used for content description
 - Fast file existence check
 - Optional integrated in-product assistance and step-by-step guidance
- User Management & Authentication
 - Create and suspend users
 - Create roles and assign to users
 - Users requested new password
 - Option to enable two factor authentication, compatible with common authentication applications
- Comprehensive security model for assets:
 - Define tags saying which actions can be performed by which user roles
 - Assign tags to assets and folders allowing fine grained user access control to information objects

Support

Operations

- Preservica Professional is operated by a professional operations team that keeps the system operating, maintains backups, checks performance and does test restores
- The hardware platforms are provided by Amazon Web Services via locations in US (N. Virginia), Canada (Montreal), EU (Dublin), UK (London) or Australia (Sydney).
- Operations fall under our ISO 27001 (Information Security Management System) accredited processes
- There is no system administration requirement for the customer
- Online & on-demand training is included for users and managers of the system.
- Remove your data from Preservica with no cost exit with no data lock-in

Standard Support

Preservica provides a full ongoing support service including community hub, email support, new feature releases and bug fixes.

Integration

Preservica Professional Plus includes the ability to extend and integrate with APIs on a transaction limited basis.

Development Program

Preservica Professional is under active development with major and minor releases made throughout the year. All development is performed under our ISO 9001 Quality Management System.

System Requirements

Access to Preservica is provided through the following supported browsers:

- Edge
- Chrome
- Firefox

An open connection to the internet is required for connection to Preservica Professional.