Bridging The Records & Archives Gap – Automating The Transfer And Digital Preservation Of Long-Term Microsoft 365 Content

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Account Director
**The context**

How significant a problem are rising volumes of information and records in your organisation?*

- **44%** A major challenge
- **39%** A challenge
- **11%** Somewhat of a challenge
- **6%** Not a problem

For 83% of respondents, rising levels of information chaos is a critical problem...

*“Optimizing the Automated Governance Capabilities of Microsoft 365” – MER, 2022*
On average, in 2–3 years incoming data flows expected to be 4.4 times current levels

Assume that the current volume of incoming data and information in your organisation is X. What do you expect it to be in 2–3 years?*

*“Optimizing the Automated Governance Capabilities of Microsoft 365” – MER, 2022
Those best in a position to know understand that long-term preservation is a major challenge

"More than 20% of our records have retention periods >7 years or are considered permanent."*

What this means…
Preservation can no longer be considered a “someday” problem

* "Optimizing the Automated Governance Capabilities of Microsoft 365" – MER, 2022

“Experienced” orgs only, >100 employees
So-called “inactive” records still have life and need to be managed

What are the THREE most important reasons that people search, discover, or retrieve inactive information and records in your organisation?*

* “Optimizing the Automated Governance Capabilities of Microsoft 365” – MER, 2022
Long-term information is at risk...

- Media which cannot be read
- Information trapped in legacy systems
- Incomplete metadata and uncomplete context
- Unclear ownership & provenance
- Corrupted or deleted files
- Obsolete file formats
- No software license or vendor support
- Lossy conversions
Keeping digital information accessible and usable over the long-term needs 5 things:

1. Safe, durable storage
2. Organized, trusted information
3. Readable, usable information
4. Secure, immediate access
5. Automated content acquisition
We are Preservica

Leaders in Active Digital Preservation™ archiving for compliance and long-term value protection

Instant access to trusted, actionable information over decades – independent of the originating application.

ISO 14721
SOC 2 Type II

Microsoft Partner

AWS partner network

Advanced Technology Partner

ISO 9001 Quality Management
ISO/IEC 27001 Information Security Management

Office Locations
Abingdon, OX
Boston, MA
There are more than 1.4 billion monthly active devices running Windows 10 or 11*
Automated governance capabilities exist in M365, but 88% of organisations still rely on manual approaches.

Who is responsible for applying retention periods/labels to content in M365 in your organisation?

- They are automatically applied based on pre-configured conditions: 10%
- This is done manually by Archivists: 19%
- This is done manually by Information Gov and Records Managers: 35%
- This is done manually by Information owners/creators: 36%

The business/IT preservation “wishful thinking” gap must be addressed.

*“Optimizing the Automated Governance Capabilities of Microsoft 365” – MER, 2022*
M365 is at the core of these challenges & enabling potential solutions

83% said the rising volume of content was a major challenge*

73% expect volumes to rise 2 to 5 times over next 3 years*

20% of that content needs to be retained for more than 7 years*

Rise in need to find and access “inactive” records*

Assured access to long-term records needed for: FOIA, regulatory and internal audits, operational reference, litigation*

Protecting long-term records needs to be an integral and automated part of your Microsoft 365 governance program

* “Optimizing the Automated Governance Capabilities of Microsoft 365” – MER, 2022
Introducing Preserve365 - seamless and automated archiving and Active Digital Preservation™ for Microsoft 365
Use familiar M365 compliance & discovery tools to ensure critical long-term records are automatically protected & always immediately accessible.

- Minimise compliance risk with automation
- Ensure critical information is actionable over decades
- Easily find & use archived content from within M365
- Maximise investment in M365 governance
- Reduce storage costs

Preserve365 embedded archiving & digital preservation

Seamless M365 archiving with Active Digital Preservation™
Developing a centralized enterprise-wide solution

“The pilot successfully demonstrated that compliance with preservation requirements in M365 is highly achievable using existing M365 functions and features and the Preserve365 connector developed by Preservica”

Aligning to strategic preservation goals

- Automate transfer of inactive born-digital archival records
- Preserve, in-place, active born-digital archival records
- Integrate recordkeeping metadata for archival description and access

Tanya Marshall
Vermont State Archivist and Chief Records Officer
Get started with embedded preservation

Preserve records using manual move, or copy, from inside M365
Extend M365 with embedded search

Enable users to retrieve archived content using embedded search
IG compliance & preservation at scale

Use predefined M365 record labels to boost user productivity and compliance
Rising volumes of long-term M365 content needs protecting

Preserve365 automates long-term content preservation & retention at scale

Embedded preservation maximises M365 investments
Join the Early Access Group to learn more

- Build your M365 and records preservation expertise
- Collaborate with like-minded organisations
- Keep up to date with the latest innovations
- Get hands-on: be part of our Preserve365 product trial

Sign-up today!
preservica.com/preserve365

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