# Incorporating Digital Preservation into your DAM program

Educational Webinar Series - Session 1 of 3
**Preserving long-term digital assets**

March 16 22

Preservica    HSEvents

# What's coming up in this first session

- Value of retaining digital assets long-term (over decades)

- What is Digital Preservation - how is it different & complementary

- **Case Study:** McDonalds Corporation

- Panel discussion and Q&A

- Summary & resources



Theresa Regli
**Vox Veritas Digital**

Preservica     HSEvents

# Today's speakers

## Michael Hope
Marketing Strategy
**Preservica**

## Mike Bullington
Senior Archives Manager
**McDonalds Corporation**

Preservica          HSEvents

# Series overview

**16 Mar   Preserving Long-term Digital Assets – McDonalds**

23 Mar   Standards & Metadata for Digital Preservation – Yale University & Digital Archivy

30 Mar   Building a Strategy for Preserving Digital Assets – BT and Lloyds Banking Group

Business value (and challenges) of keeping digital assets alive long-term

The power of combining DAM and Digital Preservation

Theresa Regli
**Vox Veritas Digital**

Preservica    HSEvents

# Why organizations keep digital assets long-term

Protect institutional
**Knowledge**

Meet
**Compliance**

Brand
heritage &
cultural
**Value**

Preservica    HSEvents

# Value & use of long-term digital assets

| **Authentic brand storytelling** | Approved heritage assets for anniversary storytelling and engaging social media |
|---|---|

| **Brand & trademark protection** | Rapid access to "proof of use" assets for multiple brands, territories and jurisdictions |
|---|---|

| **Product innovation** | Inspire and document new product innovations, retro products & heritage brands |
|---|---|

| **Corporate governance** | Protect strategic decision making, board reports, shareholdings and M&A records |
|---|---|

| **Employee engagement** | Engage employees in the authentic history and culture of the business |
|---|---|

| **Compliance & regulation** | Rapidly meet "burden-of-proof" challenges for compliance and regulatory audits |
|---|---|

Preservica    HSEvents

# Typical long-term assets – *digitized* & born digital

## Governance

Corporate secretariat, board minutes, org charts, policies, annual reports

## Heritage

Oral histories, historical research, memorabilia, video recordings, photographs, events

## Brand assets

Marketing communications, web pages, videos, design files, trademarks, usage rights

## Innovation

Product IP, designs, project documents, videos, emails, ideas, retro product lines

Preservica    HSEvents

# Digital assets are FRAGILE!

## Digital Fragility: The Ticking timebomb within Enterprises

Protect your corporate memory and future-proof your brand
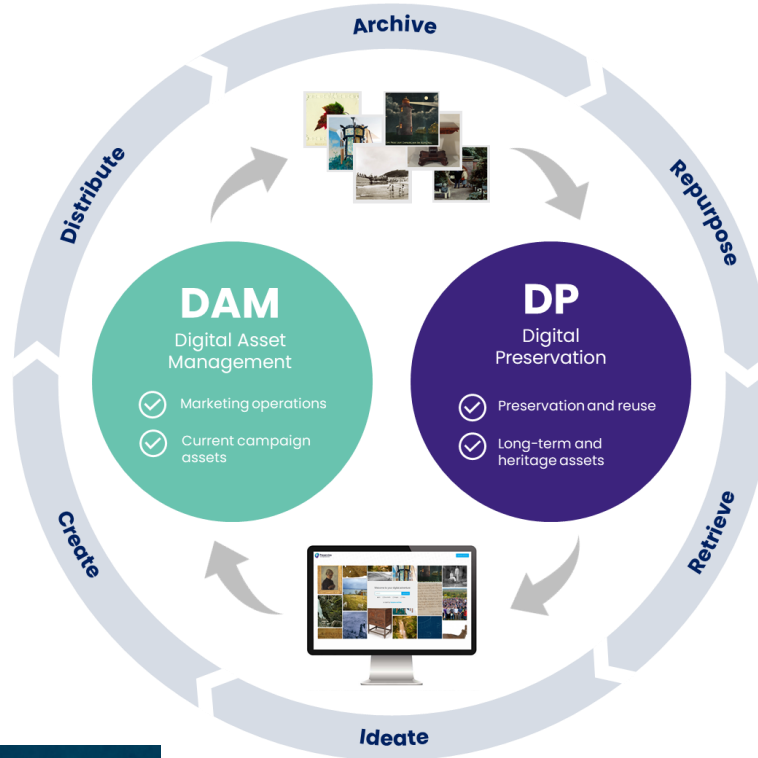
Cheryl McKinnon

**FORRESTER®**

**Digital fragility** has emerged as a risk to digital business, but CIOs and CMOs are failing to confront it.

**Corporate memory is disintegrating:** Long-term information sources are disappearing and assets are being lost. Link rot, *obsolete file formats* and storage, and vendor abandonment leave brands scrambling to save and recreate digital assets

Firms must preserve and protect long-term digital information and assets to ensure they are available when needed.

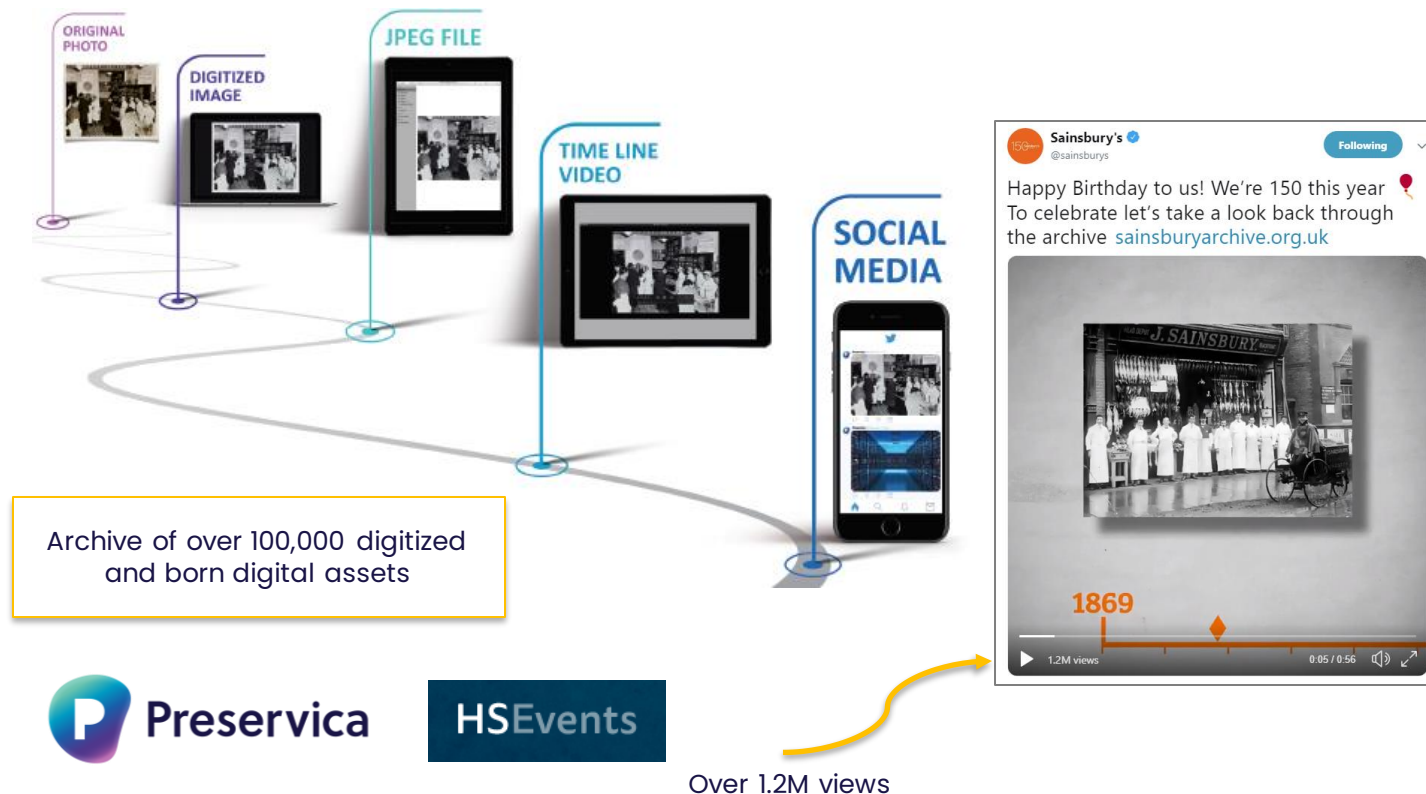# DAM & DP: different and complementary – a virtuous cycle

# Sainsbury's 150 Year anniversary campaign



ORIGINAL PHOTO

DIGITIZED IMAGE

JPEG FILE

TIME LINE VIDEO

SOCIAL MEDIA

Archive of over 100,000 digitized and born digital assets

Preservica    HSEvents

Over 1.2M views

**Sainsbury's** @sainsburys    Following

Happy Birthday to us! We're 150 this year
To celebrate let's take a look back through the archive sainsburyarchive.org.uk

J. SAINSBURY

1869

1.2M views    0:05 / 0:56

The **Tweet** & embedded **video** also become assets that can be automatically captured, archived & preserved for future use

# Preservica introduction

## What is Digital Preservation?

## How is it different from DAM
### (and SharePoint, Google Drive and Cloud Storage?)

Preservica    HSEvents

**Michael Hope**
Marketing Strategy
**Preservica**

The world's cultural, economic, social and political memory is at risk.
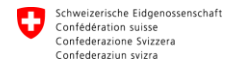
Our mission is to protect it.
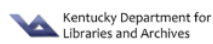
Preservica

HSEvents

preservica.com
@preservica

- **Corporate & business**
- **National & pan-national**
- **Government & state**
- **Libraries, museums & academic**

This is a collection of logos organized into these four quadrants, including organizations such as LIPA (Legal Information Preservation Alliance), The Baring Archive, RBS, Bacardi, The Honourable Society of the Middle Temple, HSBC, Lloyds Banking Group, AP, Transport for London, Network Rail, The Absolut Company Pernod Ricard, The American Institute of Architects, BT, ICAEW, NFPA, Dallas News, M&S, Unilever, John Lewis & Partners, Sainsbury Archive, FamilySearch, Amnesty International, European Commission, Library and Archives Canada, Latvijas Arhīvi, Historic Environment Scotland, nationaal archief, Österreichisches Staatsarchiv, National Archives of Australia, Rahvusarhiiv (The National Archives of Estonia), Le Gouvernement du Grand-Duché de Luxembourg Archives nationales, Schweizerische Eidgenossenschaft, The National Archives, HM Government of Gibraltar, archívum, Met Office, DNR, Alabama Department of Archives & History, Alaska State Libraries Archives & Museum, Oakland Public Library, Michigan Tech, Waddesdon, MFA, MoMA, The Frick Collection, National Library of Australia, Manchester, and many universities and archives.

# Authentic brand storytelling & protection

- Brand continuity and authenticity

- Employee & general public engagement

- Trademark defense
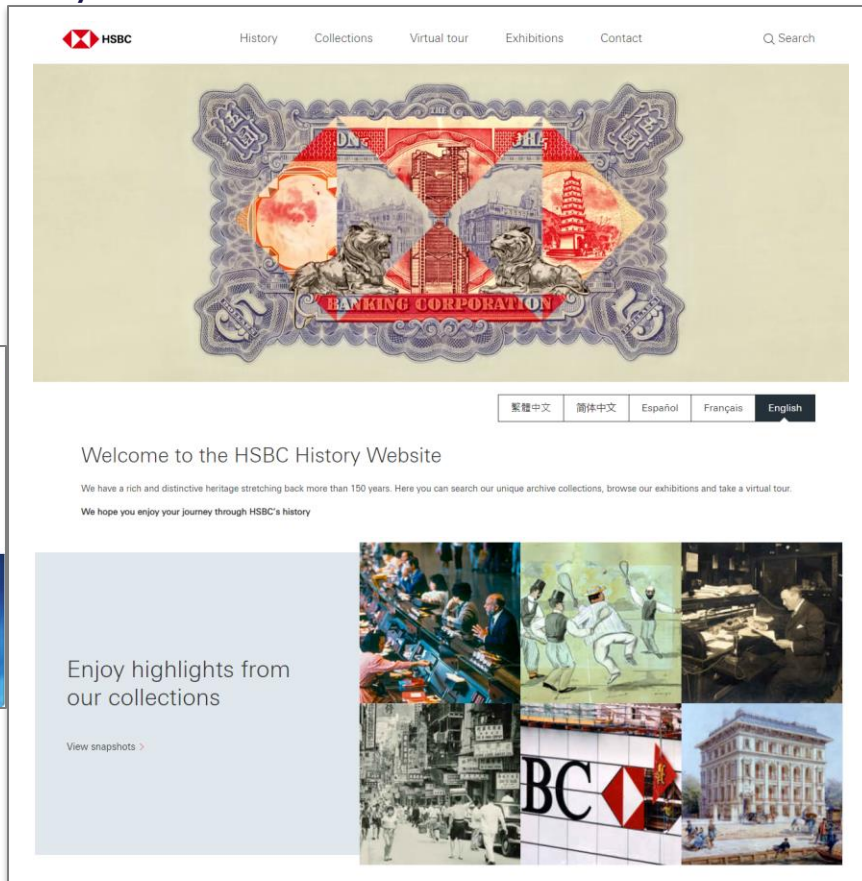
- Preserving strategic decision making of the bank

"We need a single cohesive view of our most important long-term digital assets and corporate information"

**Tina Staples**, Head of Global Archives



**history.hsbc.com**



Noel Quinn · 2nd
Group Chief Executive at HSBC
8mo

HSBC exists to open a world of opportunity for our customers. That's as true today as when we were founded back in 1865. We're always looking to the future, but we're also keenly aware of our heritage – the people, the places and the principles that made us who we are. When I was based in Hong Kong, I used to love visiting the HSBC Archives. It was always a thrill to see and feel that link between our past and our present, and to understand the legacy passed down from generation to generation.

I want more people to be able to understand that connection, which is why I'm delighted that our new history website is now up and running. It aims to open up our archives to a bigger audience and chart the creation of today's HSBC through the trade routes it was founded to serve. Take a look and let me know what you think.

https://lnkd.in/gkgs_yP

+ Follow

Preservica    HSEvents

# Leveraging authentic brand & company heritage

The Absolut Company
Pernod Ricard

- A global online resource of digitized & born-digital heritage brand assets

- Inspiration for marketing, communications and product teams

- Engaging and on-boarding employees in 140 years of company history

- Assets from one of the longest running print ad campaigns in history

"Having access to suggestions, metrics and presentations of past campaigns allows us to see what success for our brand looks like as well as what doesn't work for us"

**Lovisa Kragerud**, Corporate Archivist and Chief Storyteller

Preservica    HSEvents

ABSOLUT Country of Sweden VODKA    MALIBU

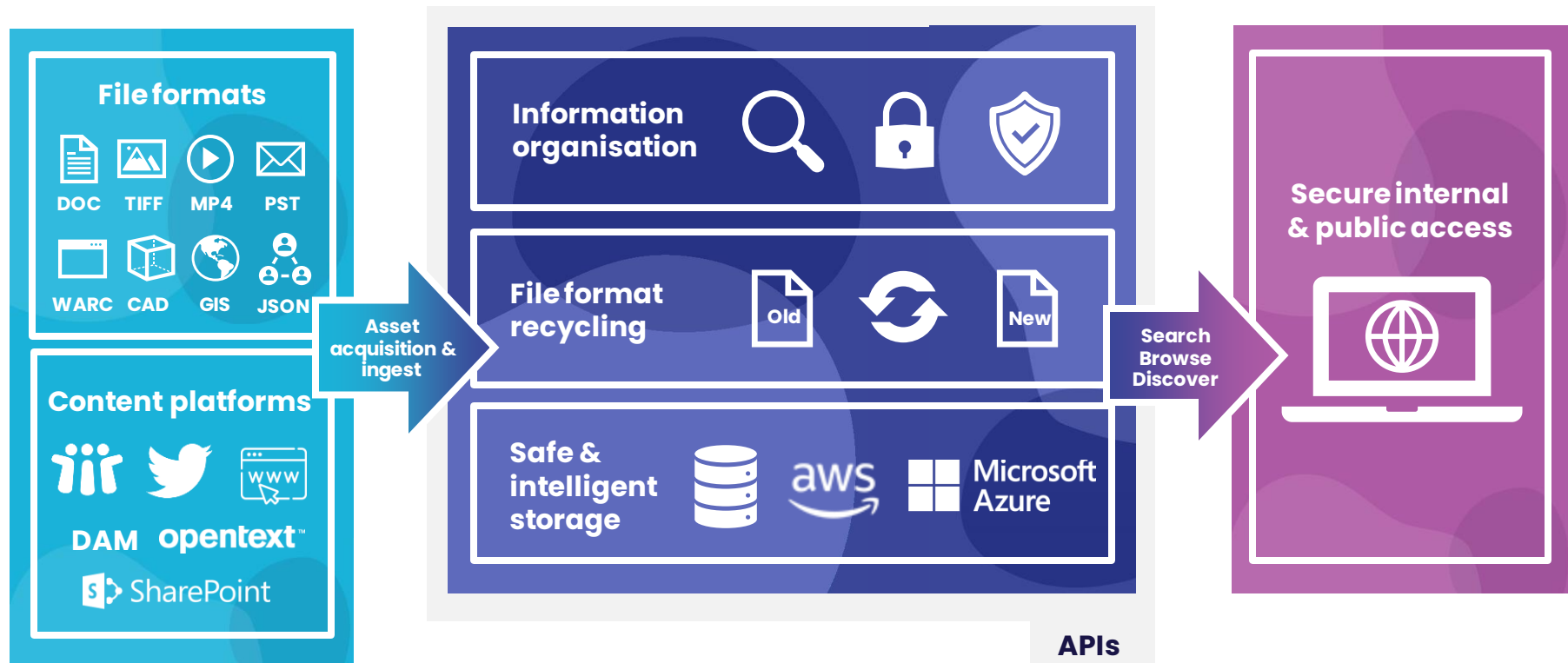# Digital fragility: loss of critical assets & knowledge
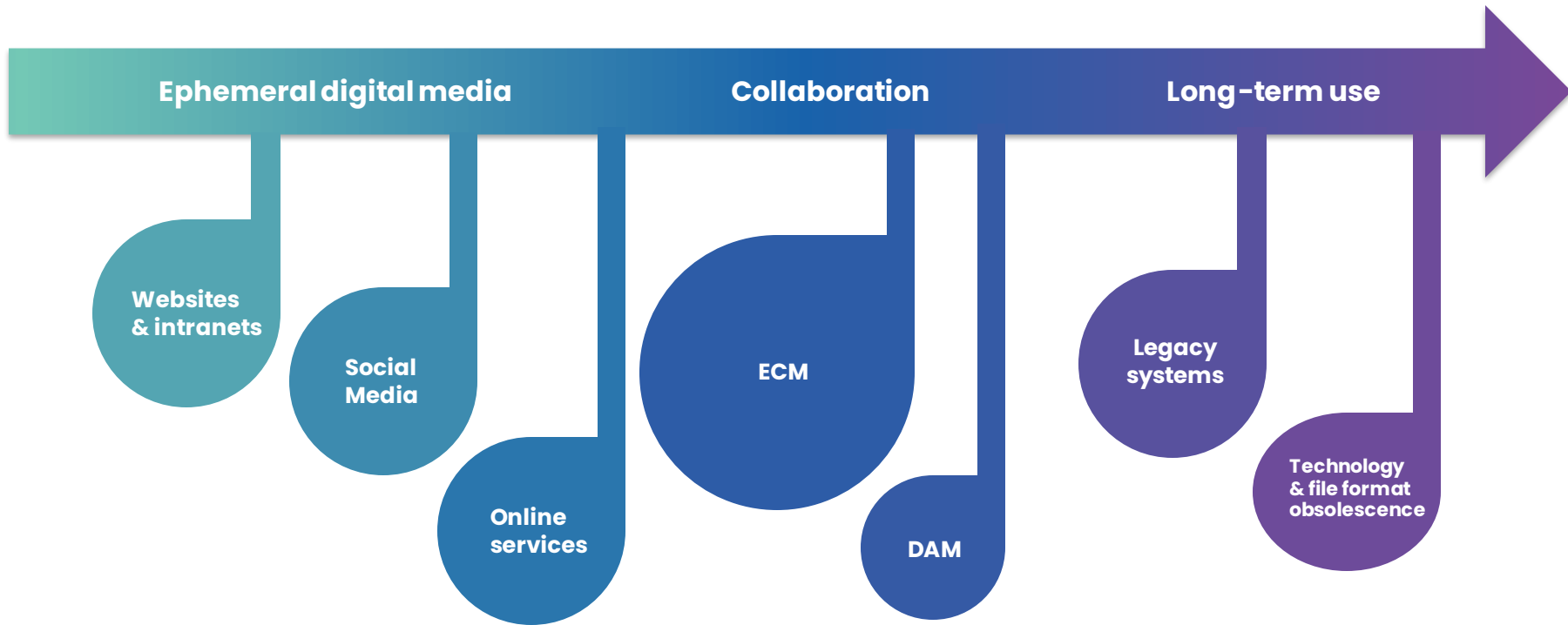
# Keeping digital assets safe, discoverable and useable over decades



Preserve & instantly view the widest variety of digital files

Automatically maintain my files in the latest usable formats

Keep my collections up-to-date, relevant and discoverable

Capture history as it's being made

Engage my communities and stakeholders online

**Preserve**

**Curate**

**Capture**

**Share**

# Keeping digital assets safe, discoverable & usable over decades

Purpose-built to industry standards for archival & preservation best practice: **OAIS ISO 14721** and **NDSA levels**
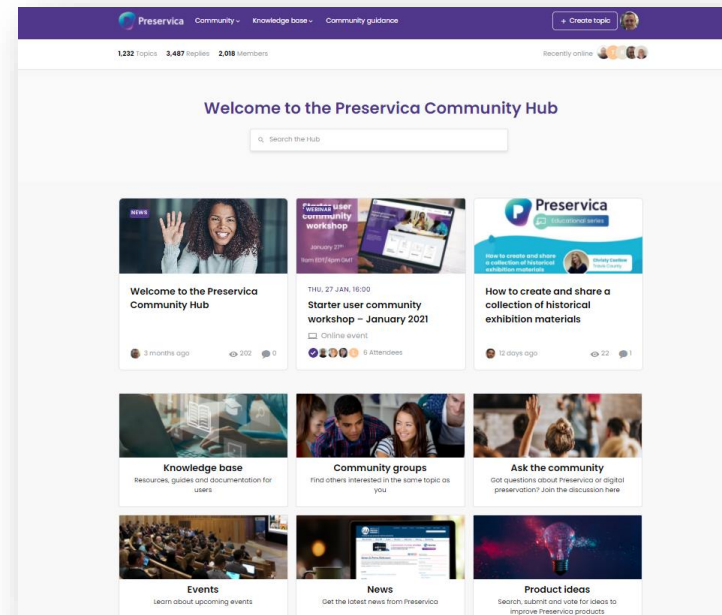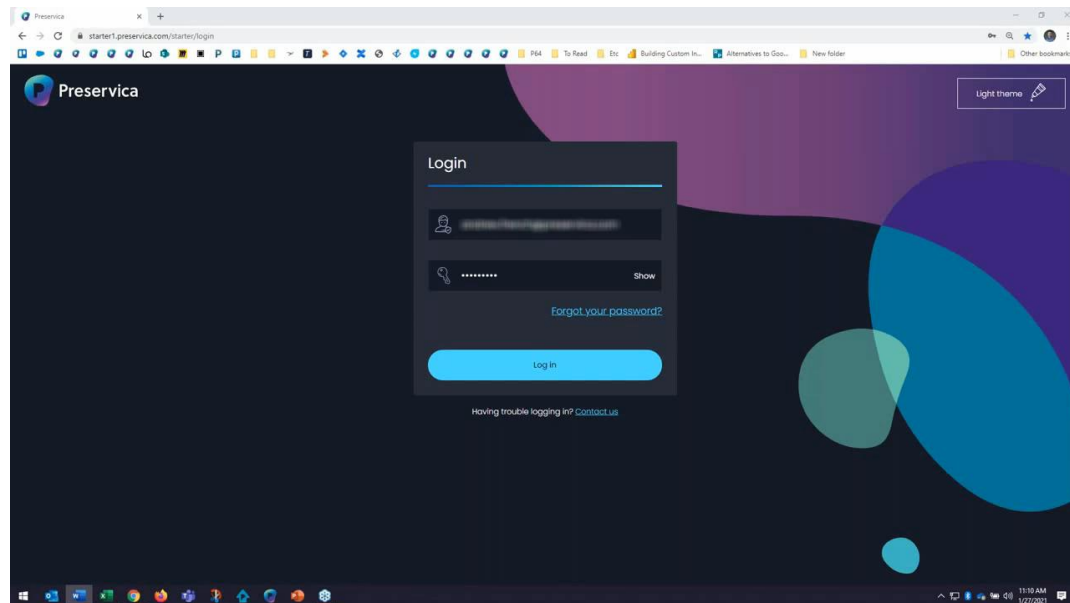


**File formats**

DOC  TIFF  MP4  PST

WARC  CAD  GIS  JSON

**Content platforms**

DAM  opentext™

SharePoint

**Asset acquisition & ingest**

**Information organisation**

**File format recycling**

Old  New

**Safe & intelligent storage**

aws  Microsoft Azure

**Search Browse Discover**

**Secure internal & public access**

**APIs**

OAIS ISO 14721   ISO 27001   ISO 9001   GDPR

# Automated digital preservation actions

Accurate identification (& transformation) of **every file within every asset** (during & post ingest)

**Asset acquisition & ingest**

- Check for duplicates
- Scan for viruses

- Generate a **visible** checksum (fixity)

- Accurately identify the **exact** file format & version
- Extract file properties & technical metadata

**Automatically** perform **preservation actions** based on your selected **Policy**

- Transform files into **long-term preservation formats**
- Create lower resolution **access copy**
- Retain the original file
- Transform assets @scale (at any point in the future) into latest formats (based on your Policy)

Securely store assets in the cloud - with multiple copies across multiple locations

# Digital preservation & access made easy....

**Preservica Starter edition** – FREE to get started! https://starter.preservica.com/

# Digital assets are getting more complex

Single asset is made up of multiple components and files
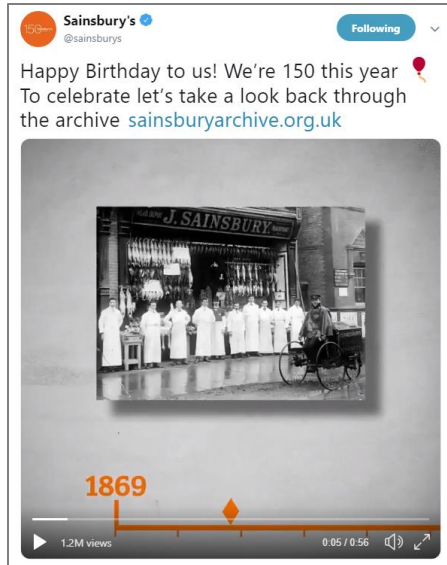


The **Tweet** & embedded **video** also become assets that can be automatically captured, archived & preserved for future use

**TEXT (JSON)**

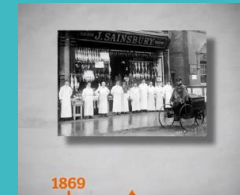Happy Birthday to us! We're 150 this year. To celebrate let's take a look back through the archive https://www.sainsburyarchive.org.uk/

**.PNG**    **.JPEG**    **.MP4**

**METADATA (JSON)**

Tweet ID, date / time stamp, count of likes, count of reshares

# Keeping assets safe, discoverable and useable over decades

| Capability | | Digital Preservation | DAM | Share Point | Google Drive | Cloud Storage |
|---|---|---|---|---|---|---|
| **Overall use** | Purpose built for archival best practice and workflows | ● | ◐ | — | — | — |
| | Aligned to **NDSA** levels and **OAIS ISO 14721** archival standard | ● | — | — | — | — |
| | Repository for all types of digital assets – office, AV, Image, Web, SM, email, digitized, GIS, CAD, 3D, eBooks - (heritage & business) | ● | ◐ | ◐ | ◐ | ◐ |
| **Preserve** | Automatically ensures files can always be read & used over decades no matter what format they were created in **– including complex assets** | ● | — | — | — | — |
| | Full file identification, characterization and preservation actions performed **on every file** during and post ingest | ● | — | — | — | — |
| | Accessible checksums (fixity) – for file integrity and authenticity | ● | — | — | — | — |
| **Curate** | Extensible standards-based, archival-grade metadata which can be enriched (at anytime) for context, relevancy and to aid search | ● | ◐ | — | — | — |
| | Management of physical, digitized and born-digital collections (with catalog integration) | ● | ◐ | — | — | — |
| **Capture** | Automatically capture digital assets from Websites, Social Media, ECM, Email and M365 | ● | ◐ | — | — | — |
| **Share** | Built-in portal for easy & controlled discovery of assets by the public, researchers and internal communities | ● | ◐ | — | — | — |
| | Easy curation for display of virtual collections and temporary exhibitions | ● | ◐ | — | — | — |

# Preservica introduction

## What is Digital Preservation?

## How is it different from DAM
### (and SharePoint, Google Drive and Cloud Storage?)

Preservica    HSEvents

**Michael Hope**
Marketing Strategy
**Preservica**

# McDonald's Corporation

# Case Study

Preservica    HSEvents

## Mike Bullington
Senior Archives Manager
**McDonalds Corporation**

**Digital Archives Preservation Solution**

Presented by:

Mike Bullington

March 16,  2022

# Global People

# Digital Archives Preservation Solution

- The Here & Now
- Digital Preservation Solution
  .
- What, Why, How
- Scope / Out of Scope
- Benefits
- Risks and Considerations
- Due Diligence
- Future

# The Here and Now

# The Here and Now

**2018 Relocation**

Work from Home?

# The Here and Now

# Magic Solution?



What popped out of the magic hat?

## What

**Digital Archives**
- Information assets that need to be preserved based on policy and historical purposes.
- Digital preservation combines policies, strategies and actions to ensure access to reformatted and born digital content regardless of the challenges of media failure and technological change.
- The goal of digital preservation is the accurate rendering of authenticated content over time.

# Why

**Digital Archives Solution**

- Preserve digital archival assets in a central repository
- Business continuity
    - Pandemic
    - Remote work
- Reduce cost
- Increase efficiency and accessibility
- Decrease risk of loss or damaged assets
- Support compliance

**How**

**Digital Archives Solution**

| Ingest Digital Assets and Metadata | Content Storage | Access, Search and Identify Assets for Clients | Download Digital Assets for Client |

**Scope of Digital Assets Solution**

- Scope of Information Assets to be preserved:
  - Electronic text documents (press releases, transcripts, correspondence, etc.)
  - Digitized images
  - Photographs (including born-digital and digitized copies), historical and contemporary, document artwork,
  - Webpages, emails, social media, selected internal webcasts

- Sources of assets:
  - Assets stored in Burgey (DAM) for archival purposes
  - Archived assets stored on drives
  - Archived assets stored in SharePoint
  - Digitized videos

# Benefits

## Reduced Business Risk

- Central location for majority of digital assets allows for improved productivity
- Reduction in effort in accessing and distributing assets from central location
- Elimination of expensive information retrieval from multiple sources and/or reconstruction of assets
- Disbursement of knowledge

## Preservation of Materials

- Preservation of materials in a digital format
- Preservation of outdated formats in readable format
- Supports compliance with McDonald's RIM policies, litigation requirements, and industry standards
- Supports current Digital Asset platform (Burgey) as a repository for current assets only vs archived assets

## Accelerated Decision Making

- Access to digital assets supports quicker decisions on brand initiatives and campaigns and future policy formation
- Quicker analysis of archived data with new emerging tools, and techniques

## Business Continuity

- Ability to timely meet stakeholders' need for access to information regardless of location
- Promotion of collection of assets to wider audience
- Supports online archive strategy for digital world
- Supports long term digital preservation strategy and protects against future obsolescence

**Risks and Considerations**

| Historical Knowledge | Resources | Preservation of Materials | API Integrations |
|---|---|---|---|
| • Archivist holds the keys to the historical knowledge of the Company | • Dedicated resource to populate platform with initial and future assets<br><br>• Risk of failure without additional resource | • Obsolete Technology - unable to open, convert and upload some older digital format (e.g. CDs, Word Perfect documents, etc.)<br><br>• Permanent loss of current materials | • Possible lack of API to integrate |

**Due Diligence**

- Engage McDonald's IT
  - Assist in identifying a solution/vendors

- Benchmark
  - Review Landscape
  - Consult with other archives employing digital preservation system

- Management Buy-In
  - Present case, plan and solution to management to acquire funding

**Future**

# McDonald's All American Games

**Thank you**

Panel

Questions?

Theresa Regli
Vox Veritas Digital

Preservica  HSEvents

# First session summary

- Value of retaining digital assets long-term (over decades)

- What is Digital Preservation - how is it different & complementary

- **Case Study:** McDonalds Corporation

Preservica    HSEvents

Theresa Regli
**Vox Veritas Digital**

# See you at the next session!

16 Mar    Preserving Long-term Digital Assets – McDonalds

**23 Mar    Standards & Metadata for Digital Preservation – Yale University & Digital Archivy**

30 Mar    Building a Strategy for Preserving Digital Assets – BT and Lloyds Banking Group

Preservica

HSEvents

METADATA IS A LOVE NOTE TO THE FUTURE

# Thank you!

**Digital Preservation 101 - primer**
https://preservica.com/digital-preservation-101

**Corporate & Business Archives**
https://preservica.com/corporate-enterprise-digital-preservation/corporate-business-archives

**Get started! FREE-forever Digital Preservation**
https://starter.preservica.com/

info@preservica.com
@preservica
preservica.com

theresaregli.com



Keep your valuable digital files alive. Forever.

Upload, preserve, organize and share your content and records online - in minutes.

Start now for free          See the features
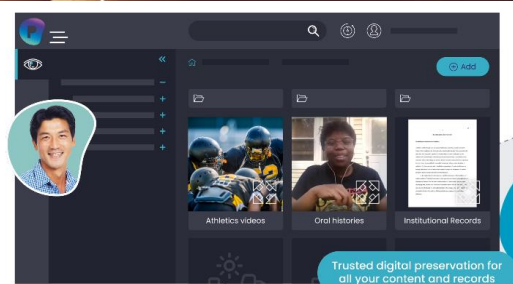
Athletics videos     Oral histories     Institutional Records

Trusted digital preservation for all your content and records

# Automated digital preservation actions
## Accurate identification (& transformation) of every file within every asset

| Preservation actions | Why is this important? |
|---|---|
| ✓ Securely stores the asset in the cloud – creating multiple copies stored across multiple locations | • If any single copy of the asset becomes corrupt ("bit rot") it can be automatically recreated from the other copies |
| ✓ Creates a **visible** checksum (fixity) for every file | • To ensure its long-term **integrity** – as above<br>• To ensure its **authenticity** – demonstrate that the file has not been accidentally or maliciously changed |
| ✓ Scans the asset and files for viruses | • To protect the archive and wider organization |
| ✓ Checks for duplicates | • So you only retain one master |
| ✓ Identifies the **exact** file format and version | • So the files can be correctly transformed **to newer formats** at any point the future |
| ✓ Extracts file properties and technical metadata | • So transformed files can be compared with the original e.g. number of words, aspect ratio, colors etc. |
| **Based on selected Policy:** | |
| ✓ Transforms files in the asset into **long-term preservation formats** | • So you have a long-term preservation master |
| ✓ Creates a lower resolution **access copy** | • So you can easily view & share with others (e.g. via a portal) |
| ✓ Retains the original asset | • So you always have the original! |
| ✓ Transforms assets @scale (at any point in the future) into latest accessible formats | • **So you can always read, use and trust your assets independent of the original application** |

# Keep assets alive over decades Preservica DAM and Archive frmat like SP slide – Social media Auto capture from SP/M365 EVERY FILE ID & Fixity   Separate Search and Access virtual exhibitions    ALL FORMS of assets  - business records also
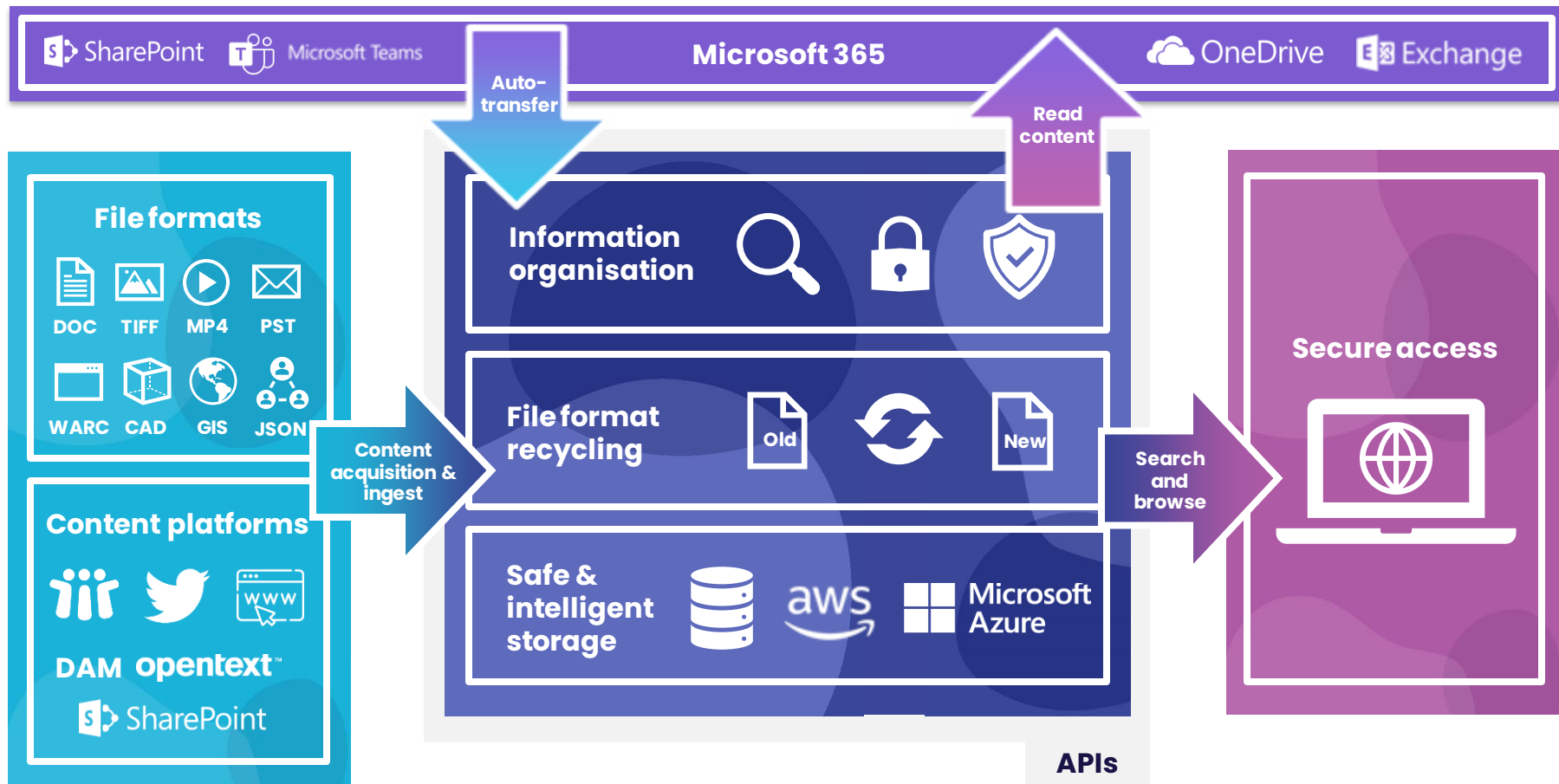
| Active digital preservation | Rapid repurposing of assets into useable formats to empower the brand |
|---|---|
| Robust archival-grade metadata | Rich descriptive context to support immersive storytelling |
| Catalog integration | For simplified management of physical, digitized & born-digital assets |
| Advanced role-based security | Controlled access over who can see which assets e.g. agency vs internal |
| Rapid search & access | Customizable portal to allow internal teams to find authentic heritage assets quickly |
| Designed to meet open archival standards (OAIS ISO 14721) | Ensuring longevity, authenticity & portability of assets & metadata over decades |
| Web archiving | Snapshot current sites & capture older sites/landing pages before they are shutdown |
| Low cost cloud storage | Reduce & optimize costs with cloud storage aligned to AWS or Azure pricing |
| Easy upload | Add new assets using drag & drop or standard cloud upload tools for larger volumes |
| Authenticity and provenance | Trusted repository with fixity checksums, extensive audit trails & secure access |

**Preservica Starter: Purpose built for preserving your content forever!**

For organizations and individuals who need to keep digital content for the long-term, Preservica Starter ensures that files are stored safely and remain accessible and readable over decades – in an intuitive, easy to use application. In contrast, most Content Management Systems (CMS) and cloud storage solutions are suited to handling transient files and cannot ensure the long-term readability or usability of critical content.

| Digital Archiving and Preservation | Preservica Starter | SharePoint | Google Drive | Cloud Storage |
|---|---|---|---|---|
| Specially designed for archival best practice and workflows (with input from the archival community) | ● | – | – | – |
| Ensures files can always be read and used over decades no matter what format they were created as | ● | – | – | – |
| Aligned to archival and digital preservation standards such as NDSA and OAIS (ISO 14721) | ● | – | – | – |
| Enables easy sharing and discovery of content online by the public and communities | ● | ◖ | – | – |
| Easy addition of metadata (at anytime) for description and to aid search using common schemas like Dublin Core & MODS | ● | ◖ | – | – |
| Powerful full-text search for rapid responses to requests | ● | ◖ | – | – |
| Accessible fixity checks for authenticity & integrity | ● | ◖ | ◖ | ◖ |

# Embedded digital preservation



Microsoft 365 — SharePoint | Microsoft Teams | OneDrive | Exchange

Auto-transfer

Read content

**Information organisation**

**File format recycling** — Old / New

**Safe & intelligent storage** — aws / Microsoft Azure

**File formats**
DOC | TIFF | MP4 | PST
WARC | CAD | GIS | JSON

**Content platforms**
DAM opentext™
SharePoint

Content acquisition & ingest

Search and browse

**Secure access**

APIs

"As formats change, software is retired and hardware becomes obsolete, the data that organisations might want to keep can be lost forever."

Gartner.

Preservica    HSEvents

# Digital preservation goes beyond traditional archiving to prevent critical information loss

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

Preservica    HSEvents

# Examples of failure & where it went wrong...

**Media degradation:** Early CDs & DVDs

**Loss & deletion:** Myspace, @realDonaldTrump

**Physical damage:** Iron Mountain, Universal

**Unauthorised access:** Facebook

Preservica    HSEvents

13 years of content

Corporate & central bank records, legal documents

500,000 songs

30 million accounts hacked
90 million improper harvest

# Preservica Community Hub

## Join & collaborate with over 2,000 archives & records professionals

- Enhance your digital preservation knowledge

- Build relationships & collaborate

- Quickly find answers to your questions

- Stay informed of industry news & events

**Access the Hub via your Starter account**