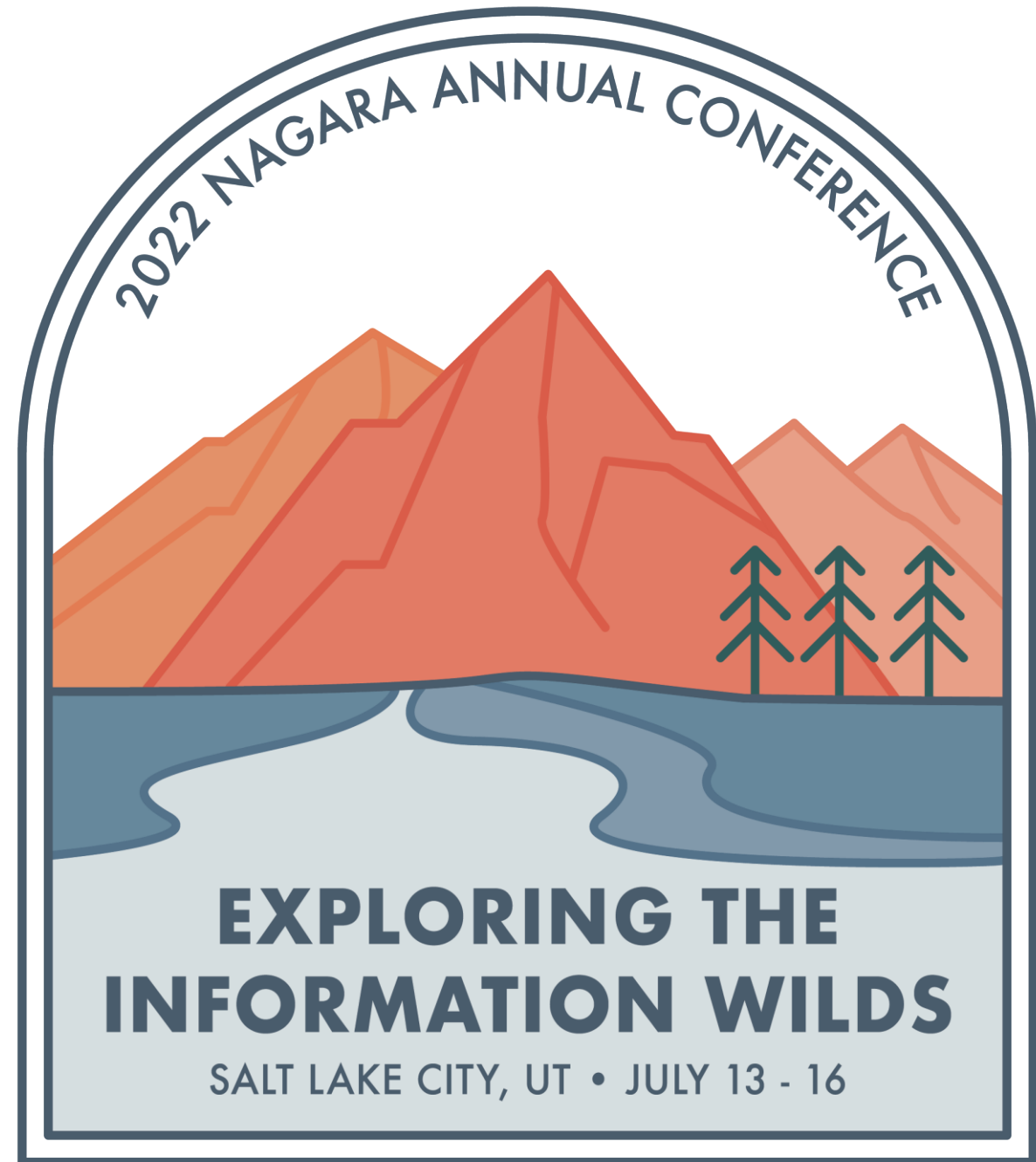


Taming the Wild West of Records Preservation in Microsoft 365

Bryan Long, Preservica
Sean McGauley, Preservica



Howdy!



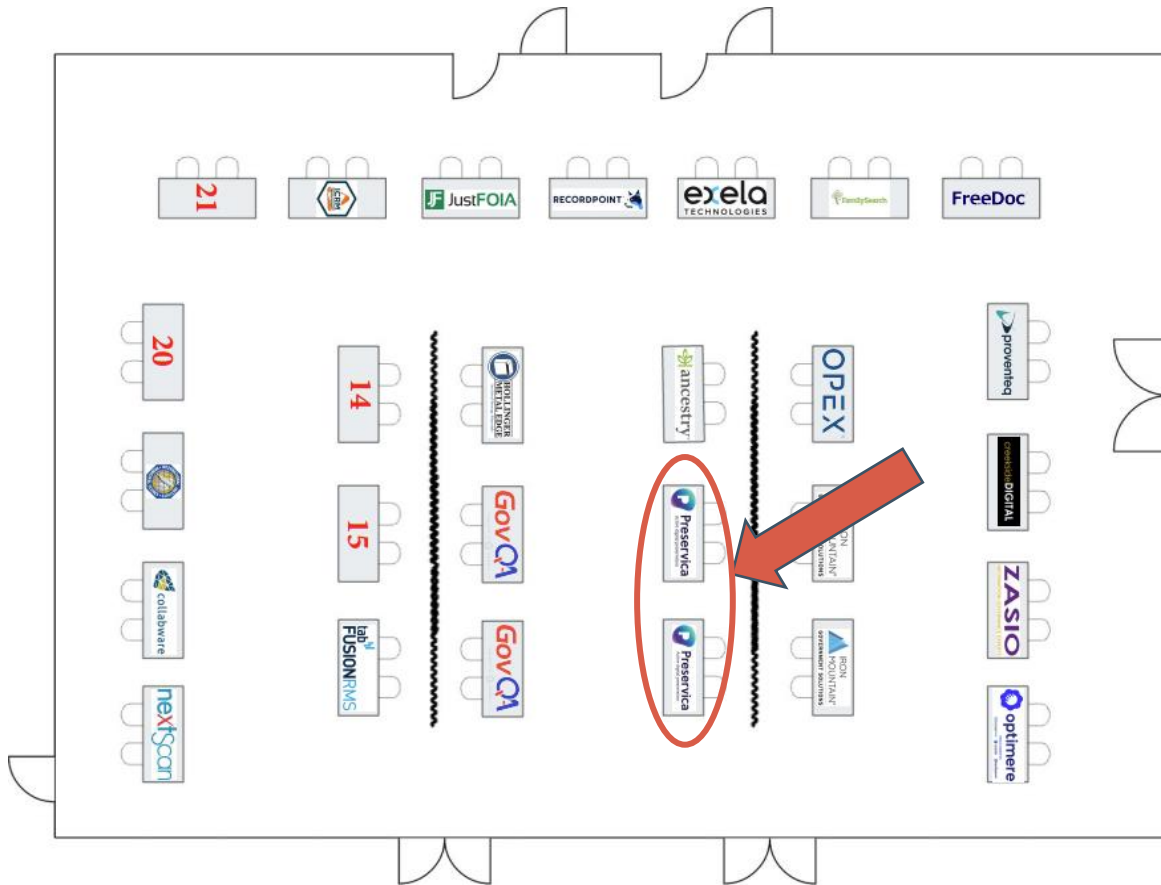
Bryan Long
Account Executive



Sean McGauley
US Marketing Manager



Hitch your horse to our booth to say, "Hi!"



**Starter Q&A
with Rebekah Davis**

**Preserve365 Q&A
with Tanya Marshall**
Thursday, July 14th
3:00-4:00 PM

Session outline

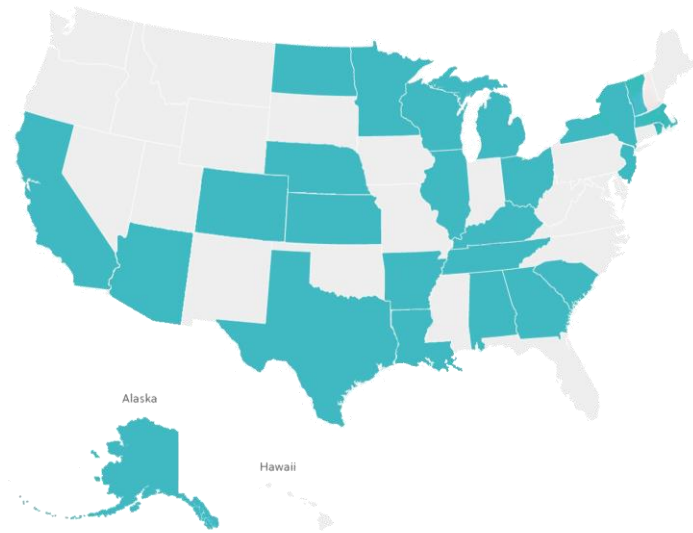
- Welcome and Introductions
- Electronic Records Preservation in Government
- Microsoft 365 – the New Frontier
- Next Steps
- Q&A

Quick polls – raise your hand if...

- You're a NAGARA member
- This is your first NAGARA conference
- This is your first time in Utah

Trusted digital records preservation for US government

25 State archives



County customers



City & town customers



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



350M+
Assets
protected



1,094
Formats
preserved



2,500+
Organizations
worldwide

Microsoft
Partner



aws partner
network

Advanced
Technology
Partner

- ✓ ISO 9001
- ✓ ISO 27001
- ✓ ISO 14721
- ✓ SOC 2 Type II

Instant secure access to trusted, actionable records **over decades** – independent of the originating application.

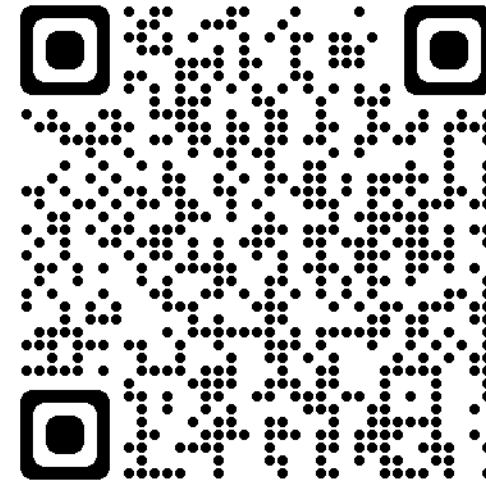


#NAGARA2022

Kick your boots off and relax...



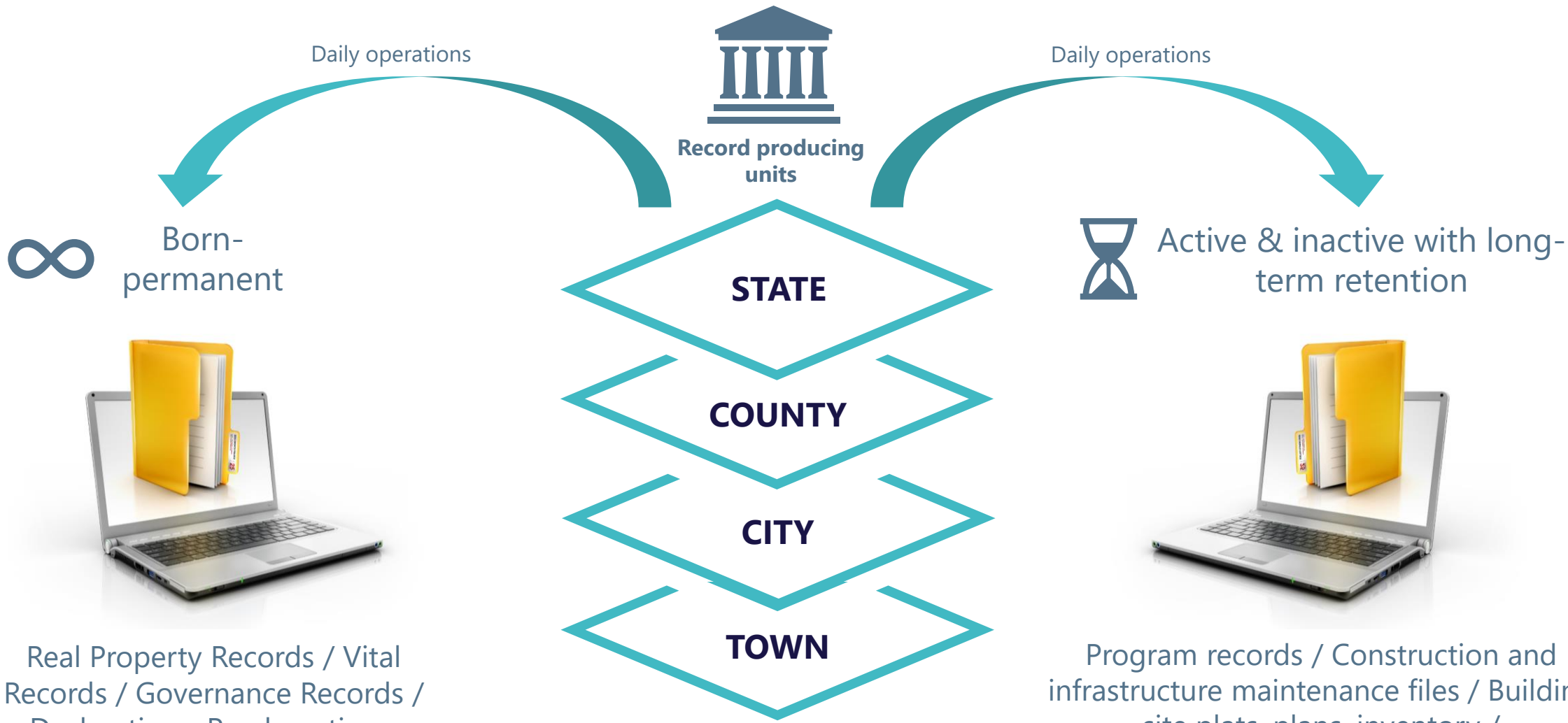
Just scan this code with your smartphone to access the slides, content, resources, and more



preservica.com/nagara2022

A stylized landscape illustration featuring a range of mountains in various shades of orange and red. In the foreground, there are three dark green, triangular trees. The bottom of the image shows a blue body of water with a darker blue outline. A white rectangular box is centered horizontally across the middle of the image, containing the title text.

Electronic Records Preservation in Government



Record producing units

Daily operations

Daily operations



Born-permanent



Active & inactive with long-term retention



STATE

COUNTY

CITY

TOWN

Real Property Records / Vital Records / Governance Records / Declarations, Proclamations, Authorizations and Executive Orders / Records of Elected & Appointed Officials / Official Vote Counts

Program records / Construction and infrastructure maintenance files / Building site plats, plans, inventory / Major equipment purchase files / State land acquisition, planting and management / Environmental management records / Business licenses / Court case files / Personnel files

Quick polls – raise your hand if...

- You manage long-term electronic records
- You manage public records requests
- You regularly encounter records access challenges

Records Preservation in Government

- The digital age has changed the way that records are created, used, managed and consumed
- **Records Preservation** is shifting gears from microfilm and paper to digital
- Long-term electronic records require active preservation

A stylized landscape illustration. The background features several jagged mountain peaks in shades of orange and red. In the foreground, there is a dark blue body of water with a lighter blue area on the left. Three dark green, stylized evergreen trees are positioned on the right side of the water. A white rectangular box is centered over the middle of the image, containing the text.

Electronic Records Preservation – Examples



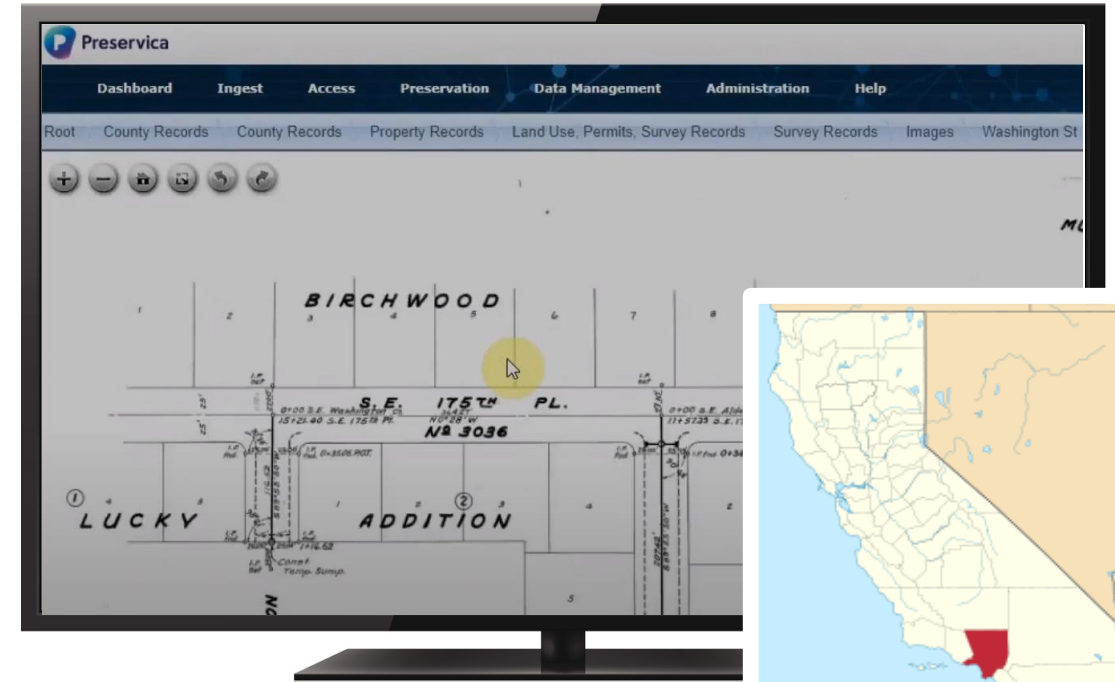
Trusted preservation for permanent public records

“I realized microfilm was a dying medium and needed to find the best way to keep our records safe in perpetuity. Digital preservation with hashing and fixity checks gave me comfort that the records would be here and be safe for generations to come.”



Portia Sanders

Division Manager Los Angeles County Registrar-Recorder/County Clerk



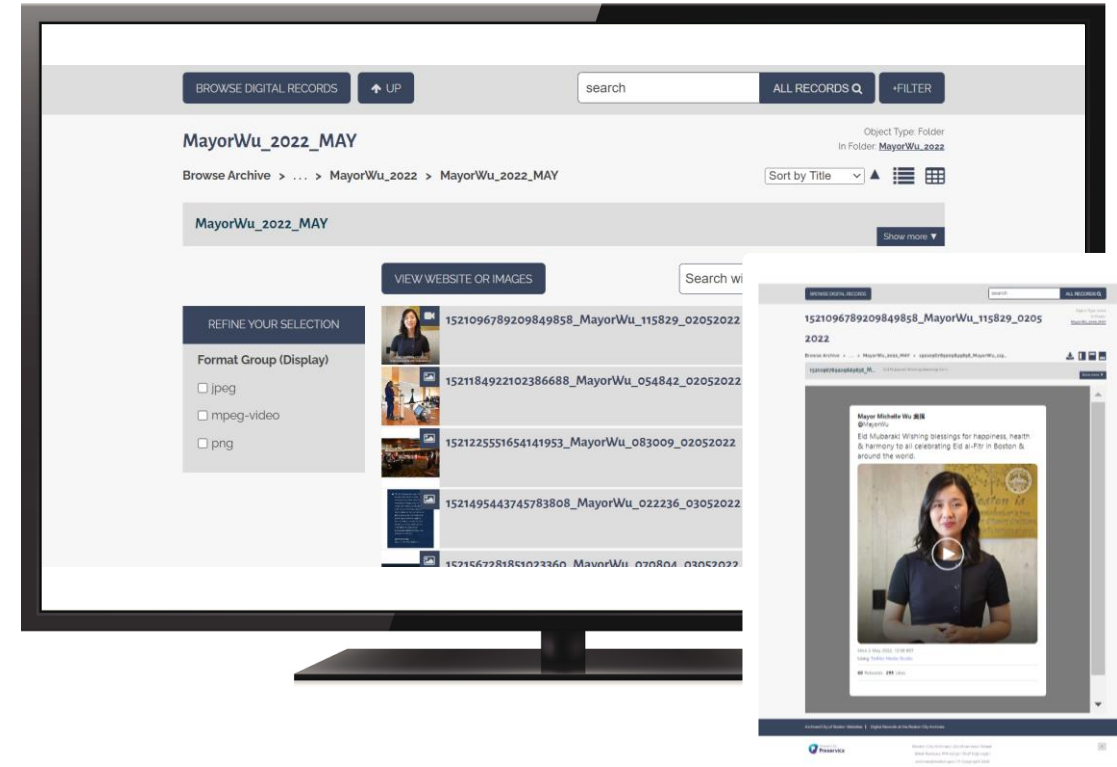
#NAGARA2022

Preserve social media records in real-time

“To ensure our public social media records, such as those of our elected officials, remain readable in perpetuity it was important for us to use our digital preservation platform rather than an archiving solution”



Marta Crilly
Archivist for Reference
and Outreach
Boston City Archives



Quickly find & produce legal records



“I have significantly cut the time needed to handle **Probate records** requests. Previously I had to share files over 4 or more emails - now I just upload and share through our online portal. It’s that easy.”



Tina Ratcliff
Records Manager
Montgomery County



#NAGARA2022

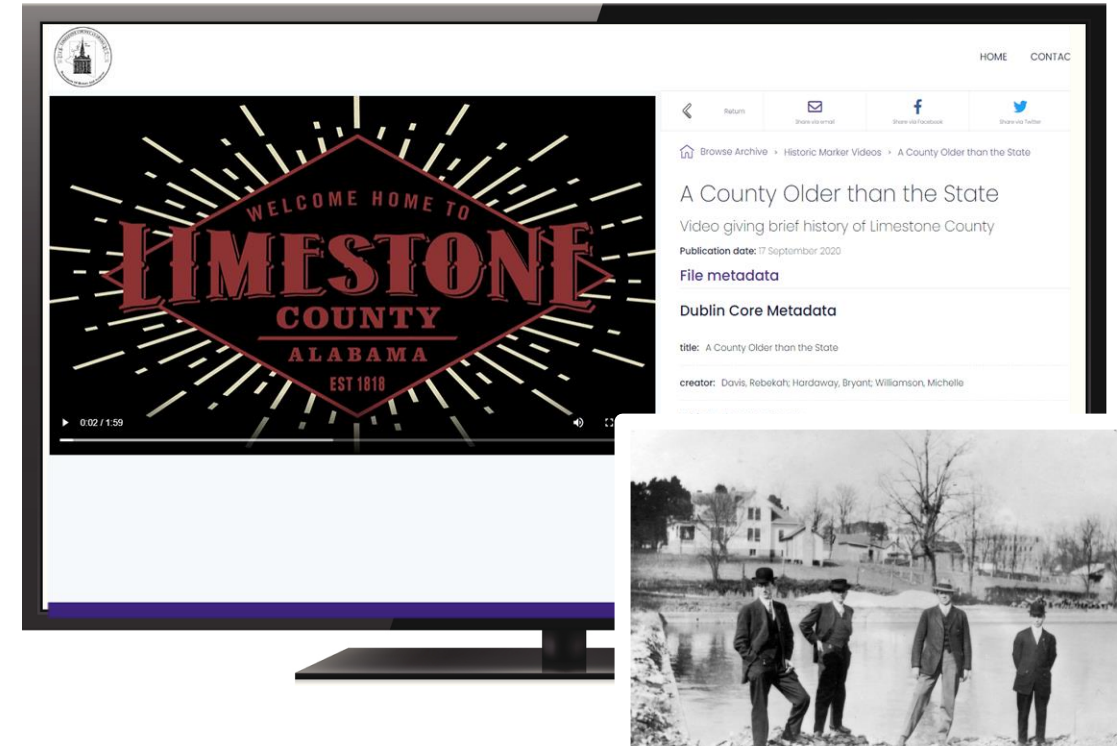


Expand citizen outreach and public engagement

“Getting records preserved and available online for our citizens now takes minutes instead of days. And by showcasing our online archive we got some amazing coverage with local press and TV channels!”



Rebekah Davis
Archivist
Limestone County



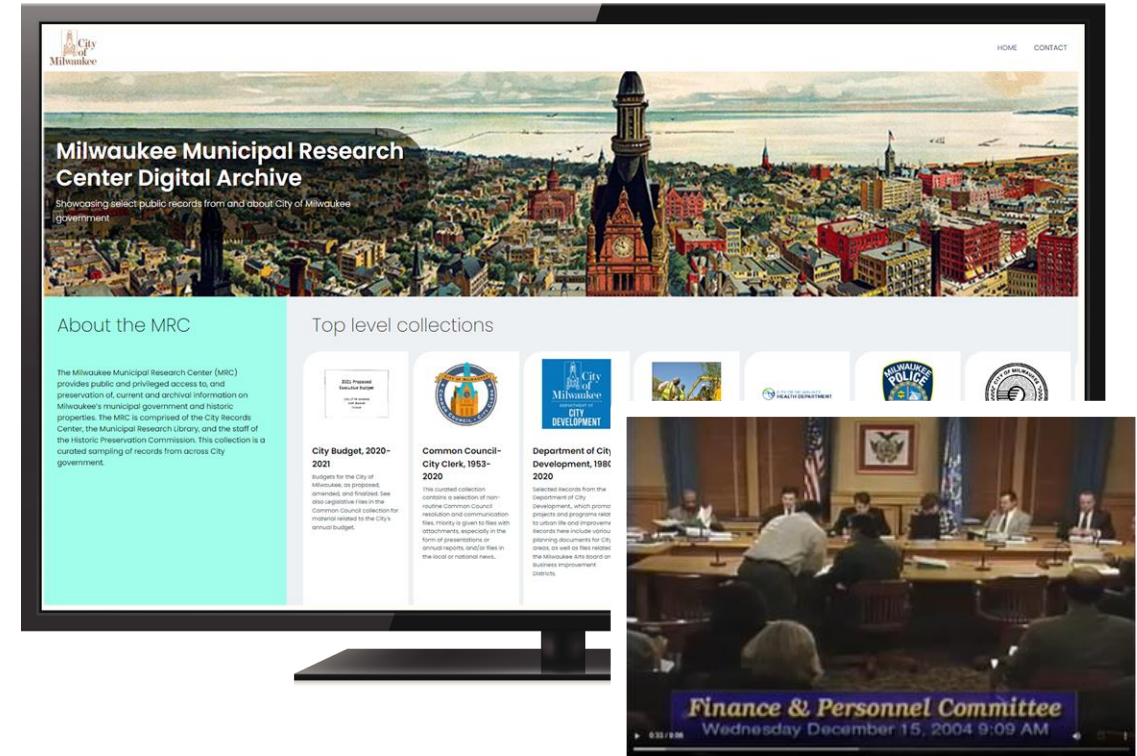
Respond quickly to public records requests



“I can now transform legacy file formats with ease, respond quickly to requests *and* ensure our digital records are properly preserved for the long-term”



Brad Houston
Records Officer,
City of Milwaukee



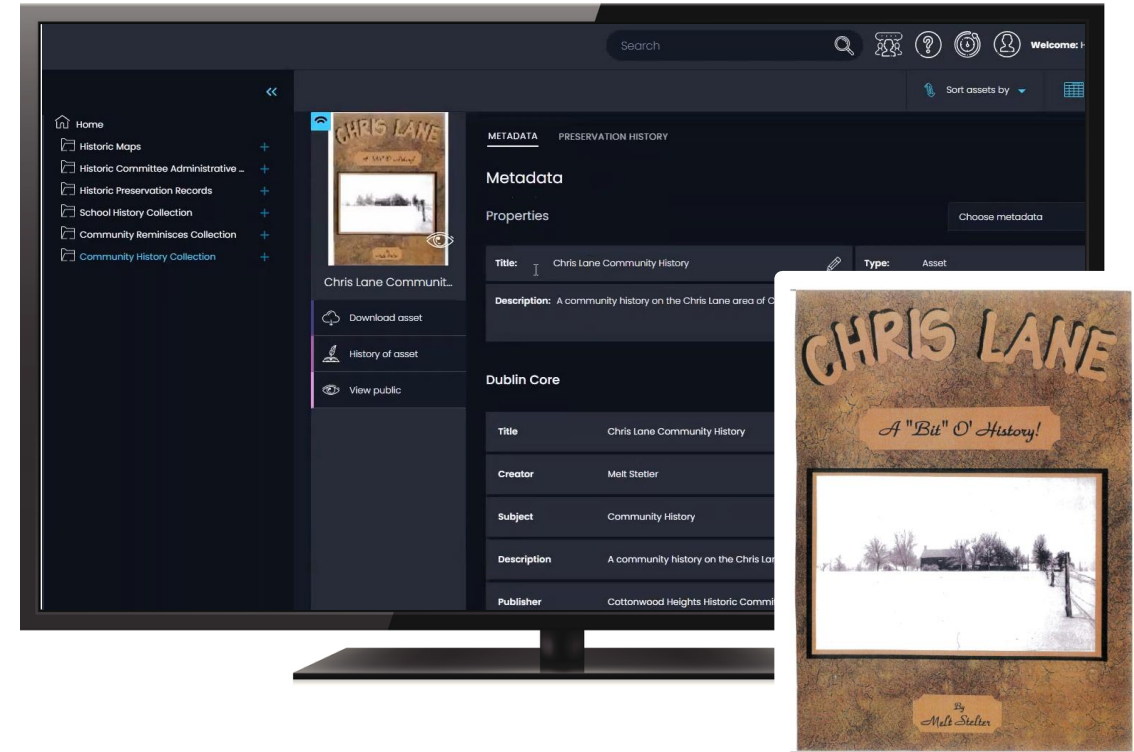
#NAGARA2022

Enrich the heritage of your local community

“Now I can future-proof *and* bring our rich local history to life online for the benefit of the community. I can quickly move history “from a box in closet to online” in under 24 hours!”



Jim Kichas
Committee Chair
Cottonwood Heights













Preservica

How ELECTRONIC RECORDS become future proofed



#NAGARA2022


Menu Search     Welcome: Jason Peel LOGOUT 














Sort assets by  View as list  Add 

Home Board of Commissioners Recordings of Meetings Public Meetings


Public Meetings





Assets (4)

 Home

-  Sample content +
-  Government Archive -
-  Board of Commissioners -
 -  Ordinances +
 -  Resolutions +
 -  Recordings of Meetings -
 -  Public Meetings +
 -  Committee Meet... +
 -  Board Meetings +
 -  Meeting Minutes +
-  Registrar of Deeds +
-  Vital Statistics +
-  Historical Archives +


Community Hub

 Recycle bin 4


 Home
 Board of Commissioners
 Recordings of Meetings
 Public Meetings

Public Meetings


Assets (4)




Washington County - Town Hall meeting




Washington County Board of Commissioners



Washington County - COVID-19 audio bulletins

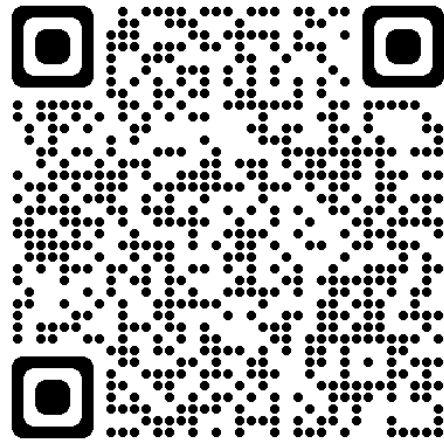


Washington County Committee Meeting...

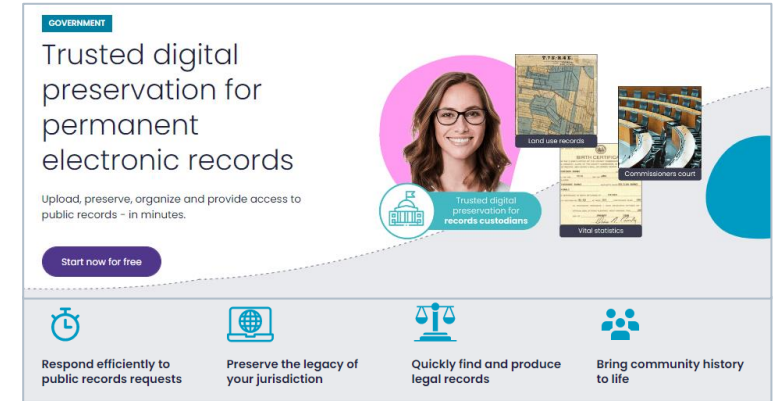


It's easy and free to get started!

Scan the QR code to get started



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GOVERNMENT

Trusted digital preservation for permanent electronic records

Upload, preserve, organize and provide access to public records - in minutes.

[Start now for free](#)

Trusted digital preservation for records custodians

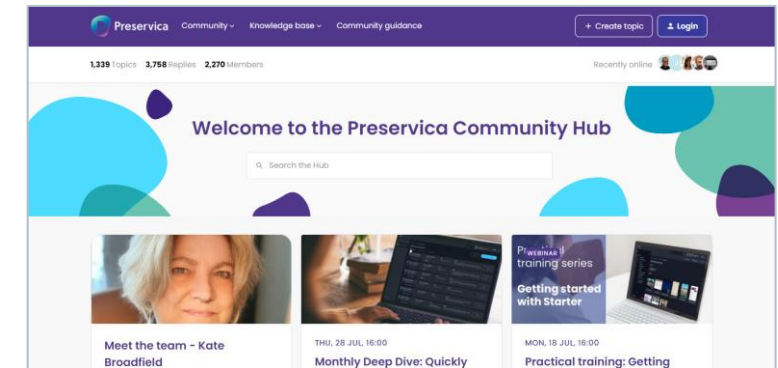
- Land use records
- Commissioners court
- Vital records

Respond efficiently to public records requests

Preserve the legacy of your jurisdiction

Quickly find and produce legal records

Bring community history to life



Preservica Community Knowledge base Community guidance [+ Create topic](#) [Login](#)

1,339 Topics 3,758 Replies 2,270 Members Recently online

Welcome to the Preservica Community Hub

Search the Hub

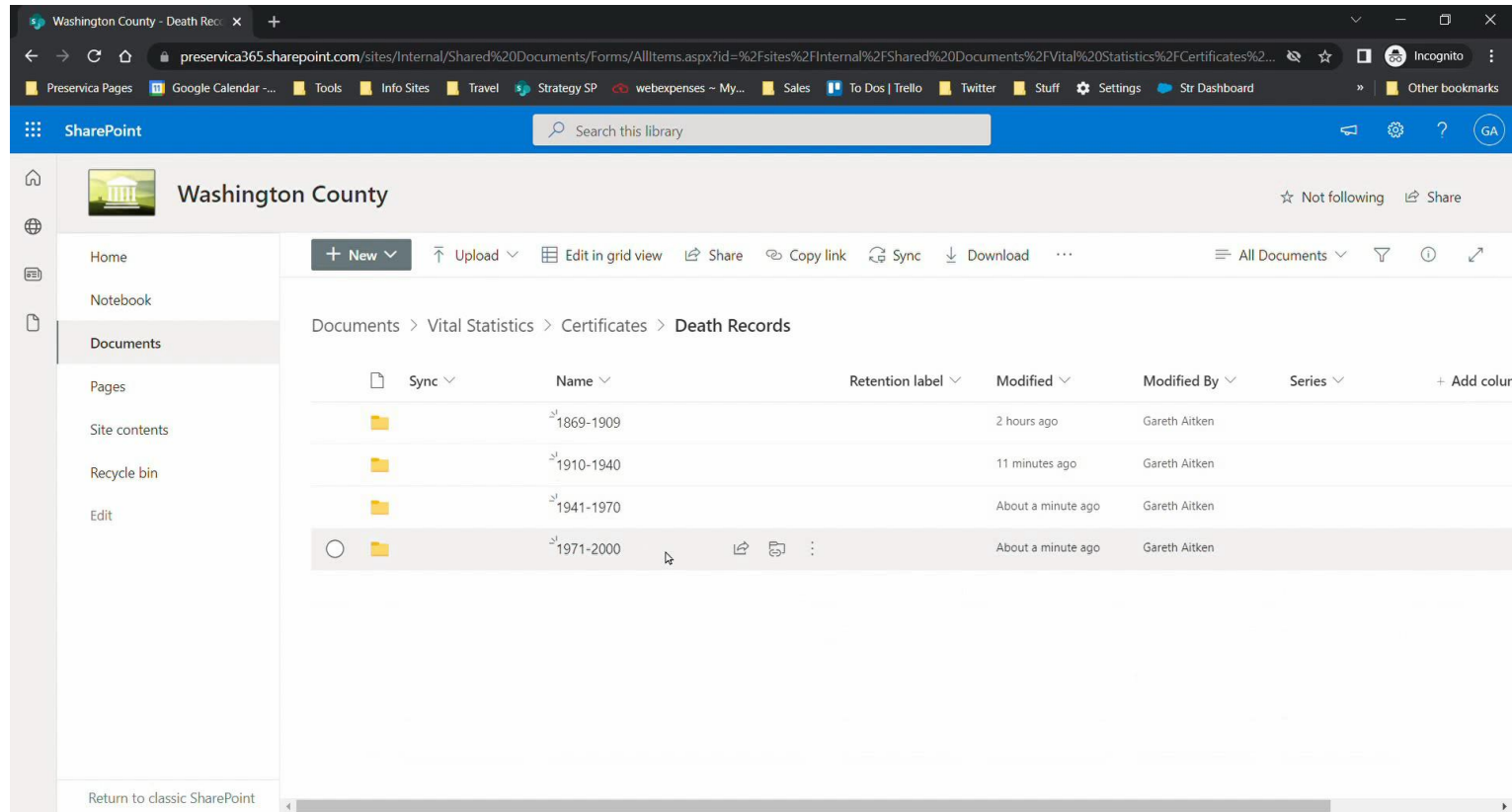
- Meet the team - Kate Broadfield**
- THU, 28 JUL, 16:00 Monthly Deep Dive: Quickly**
- MON, 18 JUL, 16:00 Practical training: Getting started with Starter**

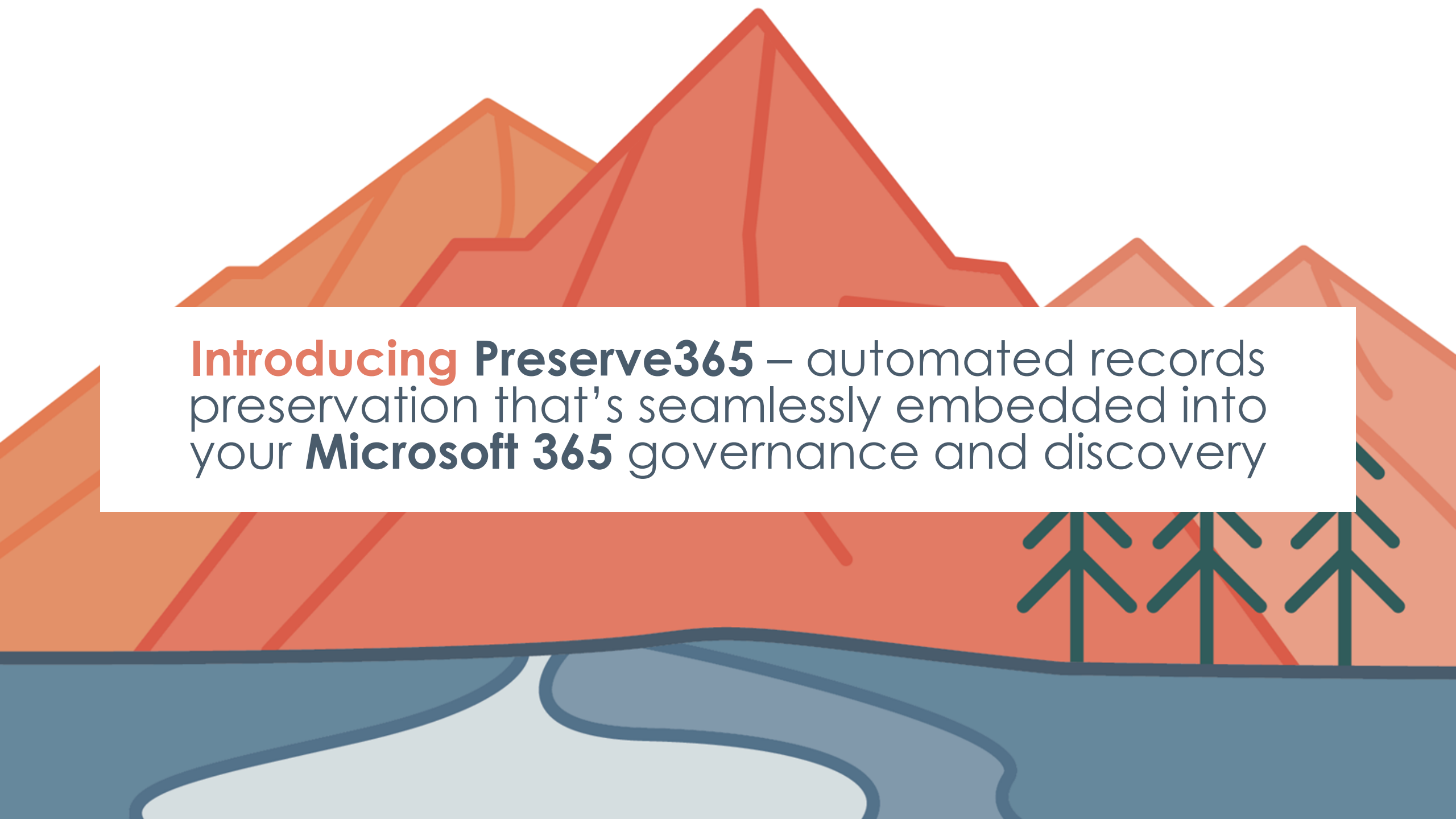


A stylized landscape illustration. The background features several jagged, orange-toned mountains of varying heights. In the foreground, there is a dark blue body of water with a lighter blue, wavy shape representing a stream or a small island. To the right of the water, there are three simple, dark green evergreen trees. The overall style is flat and graphic.

Microsoft 365 – The New Frontier

Can records preservation be this easy?



A stylized landscape illustration. The background features several jagged mountain peaks in shades of orange and red. In the foreground, there are three dark green, stylized evergreen trees. The bottom of the image shows a blue, wavy shape representing water or a path. A white rectangular box is centered over the middle of the image, containing text.

Introducing Preserve365 – automated records preservation that's seamlessly embedded into your **Microsoft 365** governance and discovery

Quick polls – raise your hand if...

- You expect the volume of born-digital records to rise significantly
- You are using or plan to use Microsoft 365
- You are using or plan to use M365's governance capabilities

You are not alone!



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 for: Open records, regulatory audits, operations & litigation*



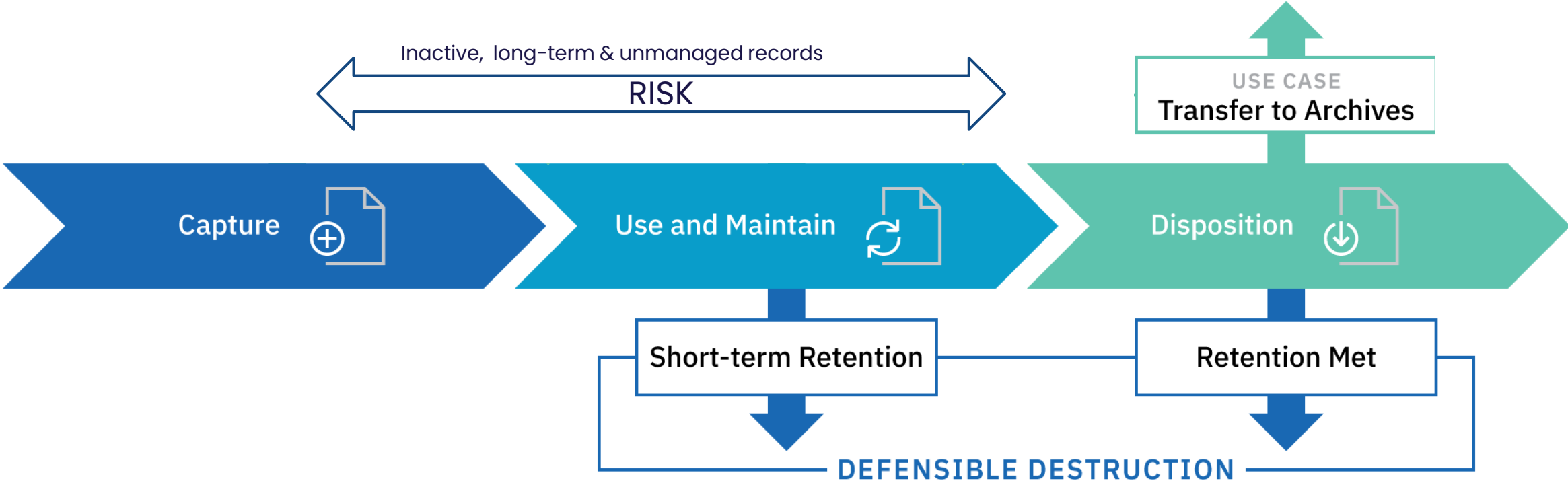
Protecting long-term records can be an integral and automated part of your Microsoft 365 governance program



[***Download the report**](#)



Preserve365: Records preservation re-imagined



Enterprise-wide records preservation

Preserve365 PILOT



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



Tanya Marshall

Vermont State Archivist
and Chief Records Officer

Aligning to strategic preservation goals

- Preserve long-term born-digital records **“in-place”**
- Automate transfer of inactive born-digital archival records
- Integrate recordkeeping metadata for archival description and access



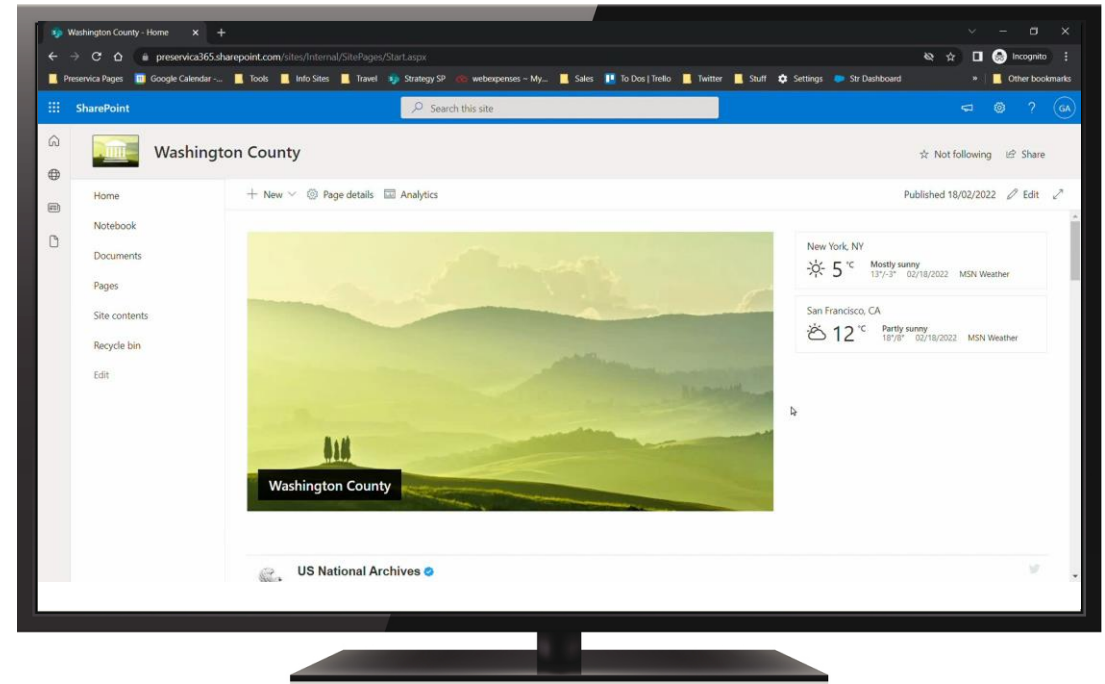
Seamlessly automate "in-place" retention & preservation at scale



Can getting started with records preservation be this easy?



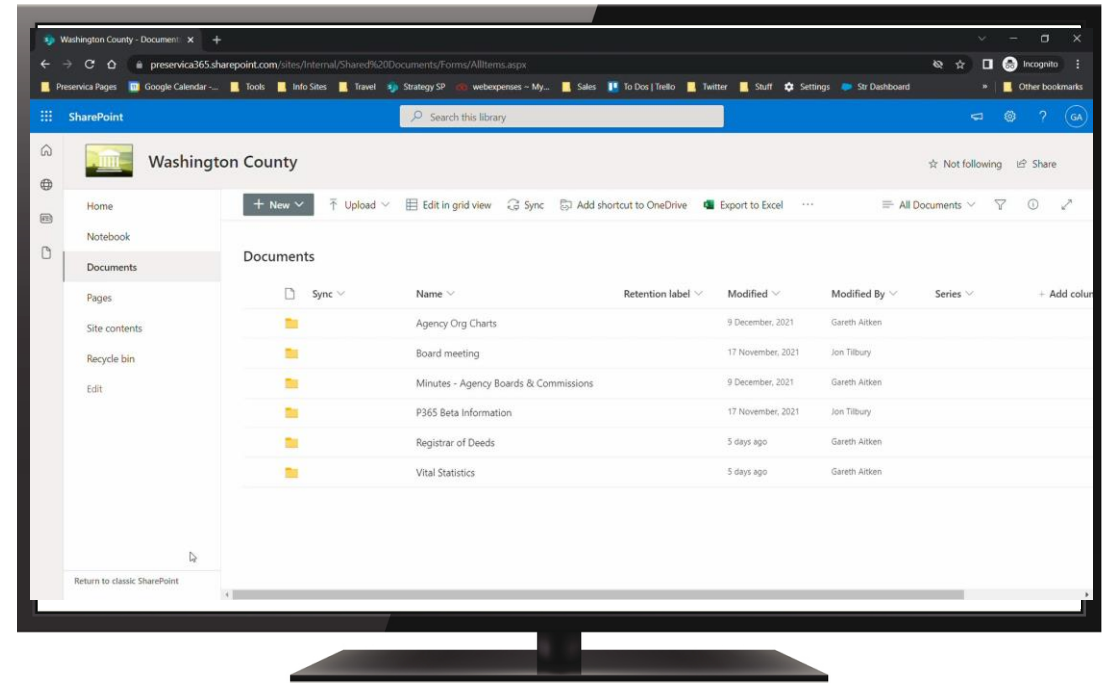
Preserve records using manual move or copy from inside M365



Can finding preserved records be this easy?



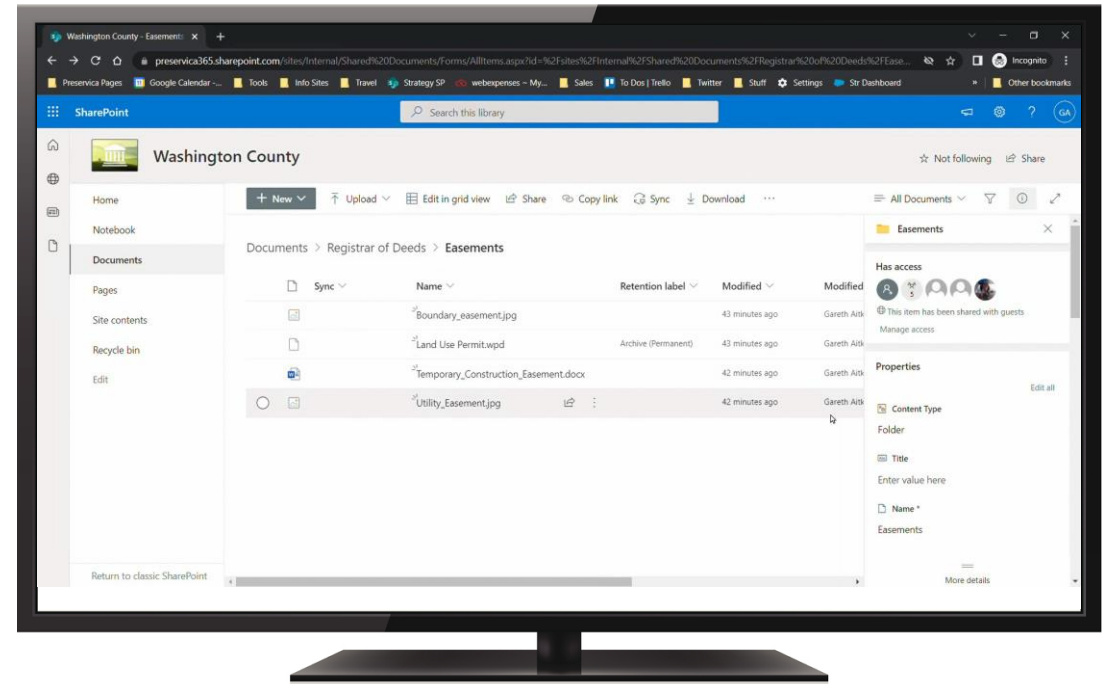
Enable users to retrieve archived content using embedded search



Can complying with IG policies & preserving records at scale be this easy?



Use predefined M365 record labels to boost user productivity and compliance



Preserve365: Seamlessly automate “in-place” retention & preservation of long-term records at scale



- ✓ Maximize your investment in M365 governance
- ✓ Improve compliance accuracy and user productivity
- ✓ Respond quickly to requests for inactive and archived records
- ✓ Automatically maintain records in State or NARA required formats
- ✓ Reduce cost and clutter
- ✓ Drive efficiency through automation

Join the **Preserve365** Early Access Group to get ahead



Build your M365 and records preservation expertise



Keep up to date with the latest innovations



Collaborate with like-minded organizations



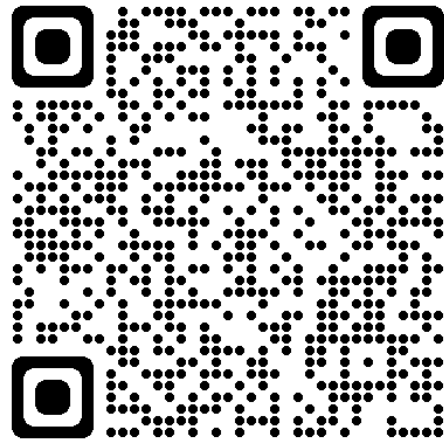
Get hands-on with our Preserve365 product trials

Join by visiting: preservica.com/preserve365

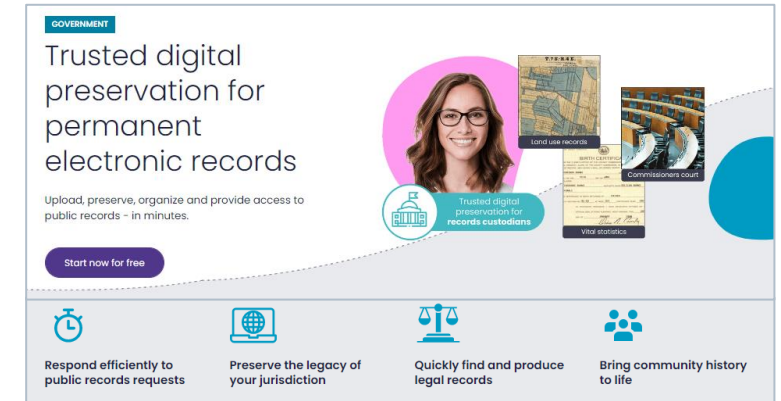


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GOVERNMENT

Trusted digital preservation for permanent electronic records

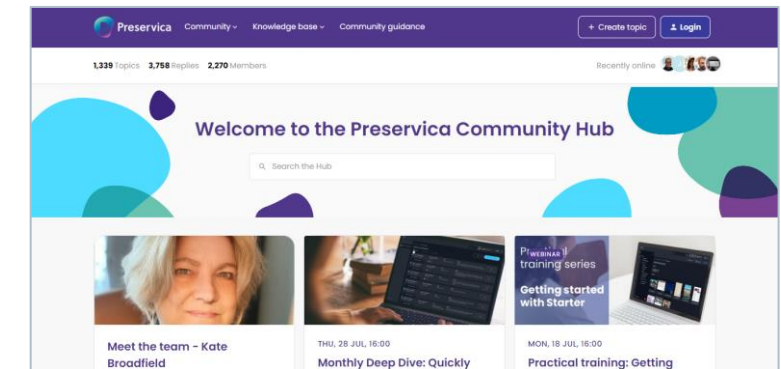
Upload, preserve, organize and provide access to public records - in minutes.

Start now for free

Trusted digital preservation for records custodians

Land use records
Commissioners court
Vital records

Respond efficiently to public records requests
Preserve the legacy of your jurisdiction
Quickly find and produce legal records
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Monthly Deep Dive: Quickly

Practise training series
Getting started with Starter
MON, 18 JUL, 16:00
Practical training: Getting



Summary and Takeaways

- Electronic Records Preservation in Government
 - The digital age is changing records creation, use, management and consumption
- Microsoft 365 – the New Frontier
 - Embedded records preservation with Preserve365
- Next Steps
 - Join the Preserve 365 Early Access Group
 - Begin your digital preservation journey with Starter





Q&A

Feedback Survey



Session Resources

