Evaluator's guide & checklist

Selecting a Digital Preservation solution & provider in the AI era

Assessing the core solution and service provider capabilities you need to scale and sustain your Digital Preservation program into the future.

Digital Preservation in the AI era

The process and criteria for selecting a Digital Preservation platform and provider has changed significantly over recent years.

Keeping pace with the growth in digital content

Rapidly growing volumes of born-digital content and large legacy backlogs have shifted the emphasis of evaluations from feature-by-feature comparisons to a more wholistic view.

This wider view encompasses how the software platform *and* the provider enable archival and records teams – often with limited resources - to get more done, eliminate manual tasks, free time for higher-value work, and efficiently sustain and grow the value of the archive over the long-term.

Automation, seamless integration with business systems, and the safe use of AI with human-oversight are now essential.

Solutions that require manual workflows, time-consuming repetitive actions and exporting and importing content between tools and systems are no longer sustainable.

Beyond the features

Equally important to a successful Digital Preservation program is choosing the right provider or vendor to partner with long-term.

Evaluating against wider criteria is vital, such as how *your* data is secured, preserved, managed and made available should you decide to exit, the active user community you will be part of, the quality of support and training you and your team will receive – and ultimately the reputation, ongoing product investment and financial resilience of your chosen provider.

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How to use this guide

This guide is based on insights from Digital Preservation community best practice as well as direct input from real-world archives and records teams that have recently run a selection process - and those with direct experience of the challenges of using tools to cut backlogs, acquire content from other systems, safely adopt AI and publish content online.

> ### The purpose of this guide
> To set out the core capabilities (rather than an exhaustive list) any Digital Preservation platform needs for the AI era, and the wider questions that determine whether a provider will make a good partner over the long-term.

The guide is divided into:

- **Quick Reference Checklist** – questions you should ask during your Evaluation process.
- **Detailed Core Requirements Checklist** – including why each requirement is important and further questions to ask vendors.

Each checklist is split into 3 main sections:

1. Running your evaluation

What are the key steps you should take to ensure you are making the right long-term choice?

2. Core Requirements

What are the essential core capabilities of a Digital Preservation solution that will enable you to grow and sustain your archive over the long-term?

3. Overall service

What are some of the key things to consider when evaluating a Digital Preservation provider and the overall service?

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Quick Reference Checklists

By evaluation stage

Use this checklist to ask questions at each stage during your evaluation, vendor meetings and demos. You should also use the **Detailed Requirements Checklist** for deeper evaluation and understanding of why each question or requirement is important.

01 Running your evaluation

Based on top tips from archives and records teams for running your evaluation process.

Check	Area	Question to ask
☐	**RFP process**	Are we exploring options and asking questions openly before running a formal RFP, rather than starting with one?
☐	**Custom demo**	Can the vendor build a custom demo around our own workflows, assets and requirements, rather than relying on a standard recorded demo?
☐	**Free trial**	Can the vendor provide a free trial so we can properly test fit, ease of use and support in a realistic environment?
☐	**User references**	Can we talk informally to other archival teams of a similar size and type about their experience with this vendor?

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02 Core requirements

Core requirements of the platform – with an essential focus on how **Digital Preservation** is managed and automated at scale across 10s of thousands of files and 1000s of different possible formats.

Check	Area	Question to ask
☐	**File and asset integrity**	Does the solution manage each asset as a complete, unbreakable entity, proving all files are unchanged and retaining the original files and all subsequent migrations as a single connected entity.
☐	**File format & preservation tool updates**	Does the vendor retain dedicated format and preservation specialists who automatically keep the registry and policies updated with the latest recommendations and migration tools?
☐	**Digital Preservation actions**	Does the solution automatically and securely manage preservation actions - on ingest and on an ongoing basis - entirely within the platform, aligned to our policy and the latest tools and format recommendations?
☐	**Online collection discovery & portal**	Does the solution include a fully integrated, secure access portal allowing authenticated direct access to the assets under preservation, with the flexibility to use a custom portal via APIs.
☐	**Human-centric AI**	Does the solution include embedded AI tools with full human oversight, high usage limits included in the subscription, and no customer data leaving or used to train models?
☐	**Data model**	Does the solution's data model operate at asset level, so we can add new assets into existing folders and collections at any point without breaking integrity?
☐	**Integration & extension**	Does the solution provide secure embedded two-way connectivity with Microsoft 365 SharePoint, plus published APIs for integration with other systems?
☐	**Built to open standards**	Is the solution architected around core preservation standards such as the OAIS Reference Model (ISO 14721) and the NDSA Levels of Digital Preservation and supports standard metadata schemas (DC, EAD, PREMIS, METS, MODS) with the flexibility to create custom schemas?

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03 Overall service

High-quality service and support are not only important for the long-term integrity and availability of your data but also for how quickly you can grow the value of your archive.

Check	Area	Question to ask
☐	**Product innovation**	Is the vendor actively innovating, with a clear user-driven product roadmap and a track record of new feature delivery - including AI - over the last 10 years?
☐	**Support, training & service**	Does the vendor provide high-quality support and training, such as a named Customer Success Manager, a support desk, local and global user meetings, a community hub and professional services?
☐	**Data and platform security**	Does the vendor have dedicated security and data protection resources, a fully populated Trust Center with current independent certifications, and AI governance policies in place?
☐	**Onboarding & deployment**	Is the onboarding and deployment process smooth and well managed, with documentation available so we can begin preserving content quickly?
☐	**Exit & data portability**	Can we exit smoothly at no cost, with all our data and metadata returned in a well-documented, easily imported format?
☐	**Financial resilience**	Does the vendor have a large, diverse customer base with recurring subscription revenue, a clear source of funding and profitability to sustain a high-quality service and a properly resourced product roadmap -over the long-term?

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Detailed Requirements Checklists

01 Running your evaluation

Top tips from archivists and records teams:

☐ Don't start with a formal RFP process

Starting with a formal RFP can constrain your opportunity to explore different options, learn what you really need, openly ask questions and uncover capabilities you might not have considered or even thought possible. Explore and learn first using some of the suggestions below.

☐ Ask for a custom demo

Take the first step in understanding how your short-listed solutions will meet your needs by asking providers to build a custom demo for you and your wider stakeholder team (don't reply on standard recorded demos). Share your Digital Preservation project vision, workflows and requirements and provide example assets to bring it to life – be sure to ask lots of questions.

☐ Ask for a free trial

Any credible provider on your short-list should be able to provide a free trial. A critical step to really evaluate if the solution fits your needs, uncover capabilities you might not have considered, how intuitive and easy it is to use and how the provider works and supports you to create a realistic test environment. You can also use the trail to showcase what can be achieved with internal stakeholders.

☐ Ask other users

Informally talk with other archival teams of a similar size and type to yourself about their experiences of using the software, support and working with your short-listed providers. If you don't know who to approach, ask the supplier to provide a list of contacts you can speak with.

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02 Core requirements

Rapidly growing volumes of digital content, large legacy backlogs and limited team resources mean that scaling and sustaining your archive requires solutions that provide automation, bulk-action workflows, seamless integrations with business systems, and safe, human-centric AI assistance.

Manual processing is no longer sustainable.

Digital Preservation

Obviously, **THE** core requirement of any Digital Preservation solution is the way it manages preservation actions - such as ongoing file characterization, migration to newer recommended formats and maintaining asset integrity and authenticity.

How this is handled – especially at scale across 10s of thousands of files in 1000s of different formats – should be **central to your evaluation**.

Automated vs manual

You can explore this in more detail in the checklist (as well as other core requirements) – however solutions that require ongoing manual export and re-ingest of files to re-characterize and migrate files (vs solutions that automate all preservation actions within the preservation system) – not only risk the security and integrity of assets but also quickly become unsustainable as file and format volumes grow and recommendations and preservation tools rapidly evolve.

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Core Requirements Checklist

Capability	Requirement	Why this is important	Check
File and asset integrity	The solution manages all elements of an asset as a complete, organized and unbreakable entity, preserving integrity while still enabling individual files to be migrated to newer formats to ensure readability. The solution should also retain the original and track the connection between all subsequent representations within an asset without generating new files in a folder. It must also prove that individual files are tamper free.	Basic systems simply store all files, including migrated versions, back in the same container or folder. This risks breaking integrity and makes it difficult to track and maintain different representations of the same asset whilst ensuring the same metadata and access control applies to all components. This quickly becomes unsustainable and chaotic as file volumes, complexity and migrated representations grow.	☐
File format & preservation tool updates	The vendor should retain dedicated Digital Preservation and file format specialists that work with the wider community to monitor and automatically update the solution registry and policies with the very latest preservation actions e.g. recommendations on obsolete or at-risk formats and migration pathways as well as the latest versions of migration and characterization tools.	Eliminates the technical challenge and manual overhead needed to continuously monitor and evaluate new or updated tools and format recommendations. Ensures the vendor is connected to global best practice and demonstrates this by publishing peer reviewed academic papers. Frees your time to focus on higher-value curation and advocacy work.	☐

Digital Preservation actions	The solution automatically and securely manages preservation actions across the archive - on-ingest and on an ongoing basis - aligned to our policy, community best-practice and the very latest migration and recharacterization tools - all entirely within the platform.	Automation (based on your preservation policy) is essential when working across 10s of thousands of files and 1000s of different formats. Retaining content within the system maintains its security, integrity and the connection between the original and all subsequent representations. Frees your time to focus on higher-value curation and advocacy work. Systems requiring time-consuming manual export to a holding area, re-ingest and review every time a format needs to be migrated are insecure and quickly become unsustainable as file volumes and formats grow.	☐
Collection discovery & online portal	The solution includes a fully integrated and secure online access portal for collection discovery by the public, researchers and internal staff. The solution should ensure all assets (including access copies) remain under full preservation within the one system and that access to collections is easy to control simply by changing security tags. Flexibility should also be provided to enable the use of a custom online portal or discovery application to share and display access copies using the platform's APIs.	A built-in access portal enables archival teams to operate seamlessly and at scale. All assets remain securely under preservation within the platform. Systems with a separate portal require content to be manually moved between systems, creating duplicate, unconnected, and effectively un-preserved copies. With some solutions the separate portal and associated additional cloud storage are an extra cost.	☐

Human-centric AI	The solution includes an extensive range of embedded AI assistance tools as part of archival workflows - with full human-oversight and control over where and how AI is used. No data should leave the platform or be used to train models. High AI usage limits should be included in the subscription to avoid the need to purchase additional tokens or unexpected bills. The system should also provide the flexibility to seamlessly and securely connect the institutions own choice of AI tools the platform's APIs.	Embedded AI tools and assistance are now an essential way for archival teams to safely and quickly increase the value of the archive at scale (especially institutions with limited resources). AI assistance can be used to eliminate repetitive manual tasks, cut backlogs, enrich discovery, ensure accessibility and compliance and ultimately free time for higher-value work. Embedded tools are fully tested and avoid time-consuming and insecure exports and reingests to separate external AI tools that require managing and often incur additional cost. Institutions should also ensure the vendor has a comprehensive customer-driven roadmap for AI and monitors and enforces emerging AI governance and standards best practice.	☐
Data model	The solution's data model should operate at an asset-level (not folder or container level) – to ensure complete asset integrity and readability over successive representations - and enable the flexibility to add new assets into existing collections at any point.	Adding new assets to existing preserved collections is a common archival requirement as new material is donated or becomes available. Basic file preservation systems with fixed data models can't add new assets to existing collections (or containers) – be sure to check.	☐

Integration & extension	The solution should provide embedded two-way connectivity with Microsoft 365 SharePoint to enable seamless, secure transfers of files, folders, lists, libraries and sites to the archive for preservation - as well as self-service access to instantly readable archived records for departmental users via SharePoint search. Access should include content that did not originate in SharePoint and was ingested directly into the preservation platform (e.g. from a legacy system). The solution should also include published APIs for integration with other system and applications.	Microsoft 365 SharePoint has fast become the main platform for content collaboration and access, with many organizations now using it for new content creation and the consolidation of content from legacy systems. Having a seamless two-way connection with the archive enables the archival team to efficiently acquire and preserve new content as well make important historical content and records available to departments via SharePoint – ultimately increasing the profile and value of the archive. In addition, this reduces SharePoint sprawl and bloat, eliminates the IT burden of needing to retrieve and re-hydrate archived files and accelerates legacy system decommissioning projects.	☐
Built to open standards	The solution is architected and developed in alignment with core Digital Preservation standards such as the OAIS Reference Model (ISO 14721) and the NDSA "Levels of Digital Preservation" framework. And supports standard metadata schemas such as DC, EAD, PREMIS, METS, MODS as well as the flexibility to create custom schemas.	Alignment to these standards is fundamental to preserving the long-term accessibility and context of digital assets and exchange between systems. Check solution and vendor depth, commitment and knowledge of these standards.	☐

03 Overall service

Choosing the right long-term partner

Digital Preservation is a long-term endeavor. Make sure the vendor you choose is committed and resourced to support you, is actively investing in the product, is financially resilient and can be trusted to protect your valuable data over decades.

Overall service checklist

Capability	Requirement	Why this is important	Check
Product innovation	The vendor is actively innovating and investing in the solution, with a clear user-driven product roadmap, and evidence of continuous innovation and new feature delivery over the last 10 years - including a clear roadmap and vision for the safe, human-centric use of AI.	Look beyond immediate requirements to ensure the solution and vendor are committed and resourced to grow and adapt into the future aligned to the input of an active user community. Ask the vendor to also show their record of published academic papers.	☐
Support, training & service	The vendor provides high-quality support, training and services that will enable the archival team to confidently and quickly grow the archive. This can include a named Customer Success Manager, a dedicated Support Desk, an extensive & free training program, an online Community Hub and Forum, regular user meetings and briefings and a professional services team to help accelerate the Digital Preservation program.	Successful Digital Preservation is about working with the right people and user community as much as it is about the technology and software. Make sure you evaluate and assess the support, training and service provided thoroughly. Ask others about their experiences and request a free trial where you can experience working with the solution and the vendor.	☐

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Data and platform security	The vendor has dedicated, expert resources that proactively manage and prioritize the security, privacy and availability of customer data and the platform. This can include an expert Operations team, a full-time Chief Information Security Officer (CISO), a Data Protection Officer (DPO), secure-by-design processes for product engineering, a fully populated Trust Center with up-to-date independently audited certifications, AI governance policies and a proactive internal and external security program.	Digital Preservation is all about the long-term availability and integrity of your valuable data. Be sure to assess and evaluate this area fully and ask vendors who is responsible within their organization for data security, privacy and governance. Check the currency of all certifications.	☐
Onboarding & deployment	The onboarding and deployment process should be smooth and well managed – enabling the archival team to begin preserving content quickly and maximizing the investment in the platform.	It is vital for your Digital Preservation service to get off to a strong start. Ask for an overview and documentation of the onboarding process. Speak to others about their experiences.	☐
Exit & data portability	The vendor should enable a smooth no-cost exit should we decide to leave the service - providing all data and metadata back in a well-documented open format that can be easily imported into another system.	Don't get locked-in. Being able to exit smoothly is important but remember to also evaluate the innovation, support and service you will receive throughout the relationship, not just at the end of it.	☐
Financial resilience	The vendor has a large and diverse customer base with recurring revenue from customer subscriptions to fund and maintain a high-quality service and a properly resourced future product roadmap. The vendor should have a clear source of funding and is profitable.	Choosing the right long-term vendor to partner with is fundamental to the long-term accessibility and value of your archive. Financial resilience and a sound business model is not just about whether the vendor or supplier will last but also about the service quality, support and product innovation you will receive over the years.	☐

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