



Preservica User Briefing Q&A

2025 Vision and Roadmap

Q. Are there any improvements being made to downloading at the folder level? Specifically not requiring each asset within a folder to be zipped upon download?

A. Yes, we have started work on this with some platform preparation in the March release ahead of fully developing this within the New Generation in Q2. It would be great to get your feedback on the design for this if you are interested - we will reach out in the coming weeks to check as we finalise the design.

Q. Are there any publicly available example implementations of Portal?

A. You can view examples of customers that have created engaging access and discovery experiences in our showcase on the Preservica website - <https://preservica.com/resources/access-and-discovery-showcase>.

Q. Can you be more specific about the timeline for catalog linking, specifically for ArchivesSpace? This is a key feature for us and a barrier to NewGen adoption.

A. We are currently targeting this for Q3 (still within the first half of our roadmap year) as we focus first on ingest and bulk metadata editing in Q2 (the first quarter of our roadmap year).

Q. Could you talk a little more about linking outlook to Preservica? Namely, the formats that emails + inboxes will be when migrated into Preservica - PST, EML, MBOX? As well as options for format migration within Preservica?

A. The first release of Preserve365 for Outlook is designed to leverage Microsoft Purview's ability to identify and label emails within your organization. This approach focuses on preserving individual emails and their attachments, rather than migrating entire mailboxes—at least in this initial phase.

In terms of file format, we will be retrieving emails in the EML format for preservation.

Q. I'm also curious about the ability to upload metadata in bulk via SharePoint might impact current ingest processes. Would this negate the need to run simple and/or PAX scripts to marry metadata + collections? Would we be able to ingest the collection without metadata and then apply the metadata after ingest directly from SharePoint?

A. It is our intention to allow you to apply metadata in bulk after ingest as well and we'll be able to share more details on how this will work as we continue to design this in the coming couple of months. If you want to talk to us about your requirement, please reach out to support@preservica.com.

Q. Curious if you're looking into the energy and water usage/environmental impact of the AI features and how that balances against what is gained.

A. Sustainability is one of our key considerations. Do take a look at our Sustainability Charter (<https://preservica.com/sustainability>). The Energy consumption/footprint of data processing will have to be weighed against the need/value of the processing (and the footprint of any alternative methods)

Q. Would love for you to discuss the sustainability charter in conjunction with AI implementation – everything's a balance, and I think people need to be informed to make decisions.

A. That's a great point. As we add built-in AI and to no small extent when people add AI or other processing through APIs, we should keep a thought for the Carbon Footprint. We have no measurements yet, but we will be keeping an eye on this area.

Q. Drag & Drop will be possible up to 50GB on Starter and Professional. Is there a gigabyte limit to batch ingestion on Enterprise using the other methods?

A. If you have access to other ingest options, such as PUT and Incremental Ingest using the OPEX format, you will be able to ingest more. You can always ingest in batches and ingest assets in batches up to 40TB.

Q. For those of us using the ArchivesSpace integration, will that be modified to point users to the Portal instead of WordPress?

A. We are aware of this requirement that a lot of our customers have and know it will be key for helping you switch from Universal Access to the new Portal. Currently, our roadmap focus is on adding catalog capabilities to the New Generation interface first. So we will share more updates on further plans for Portal later this year.

Q. In Portal – will the Date range facet be updated to apply to the date a record was originally created, rather than the date it was ingested? Similarly, for the dates displayed on records and folders to show the date the original record was created (e.g.: 1/1/1970) rather than the ingestion date (1/1/2024)?

A. Yes – our intention is to allow you to customize the date field this facet is using. However, for the March release we're starting with some improvements to the facet itself and how it works ahead of then expanding customization options.

Q. I am still using SIP Creator because many of our files and sips are inherently 100+ GB and it is the only program that can use that. I have been told that the only workaround for the new tools is to do an FTP share to a holding area and then using the tools to take over from there. I don't want to retire a tool that works for one that is half built for files this large. When will Preservica's new tools be supporting files this large?

A. Upload capability is inherently limited by customers' own browsers and internet connection performance. Until your content is uploaded into a holding area where Preservica can access it, the transfer depends largely on customers' own tooling. So while we've increased the drag & drop upload limit to 50GB, we don't expect to be able to increase it further without impacting reliability or causing frustration for customers. For larger uploads, we still recommend to use a File Transfer Protocol tool like Cyberduck, FileZilla, etc which upload in the background and give you more control over getting content to where Preservica can access it. Given the wide availability of these tools, we do not intend to continue supporting SIP Creator indefinitely and do recommend switching to another tool now.

Q. I understand that we can't use the NG portal to restrict access by IP address, although this is in development at the moment, do you have a date for rollout yet?

A. This is not in development currently. We know that quite a few customers use IP restrictions with Universal Access, however we are still exploring how we might serve this within Portal. As we speak to customers about this, we are learning that some are using it for example to control access to reading rooms which we can serve with a better solution within Portal such as temporary access grants. If you do want to talk to us about your use case, please do reach out to helena.pilih@preservica.com (Senior Product Manager). We are currently targeting updates to Portal access restriction in Q4 '25 / Q1 '26.

Q. We can use portal and universal access but at some point support for the WordPress front end will cease – do you have a date for this yet?

A. We don't have a date yet however this is our intention. We will be sure to give you an timely notice so you have time to move over and in the meantime, if you have any feedback on Portal that's stopping you from moving over, please do let us know!

Q. If you set up your portal in the original interface (WordPress) is there a way to transfer it to the new interface portal?

A. WordPress (Universal Access) and Portal can be used concurrently as they both expose a view on your archive. So in terms of your content, there is no transfer that is needed. It's only Portal settings that are configured separately from WordPress – with Portal all of the maintenance and customization is done within the New Generation interface for easy access. Please see this help article for details on how to configure your access settings:

<https://community.preservica.com/how-to-guides-74/managing-your-portal-settings-2386>

And we also have a general FAQ page about Portal which may be helpful:

<https://community.preservica.com/training-125/portal-faqs-new-generation-discovery-platform-2392>

Q. Is there a cost for Academy courses?

A. No cost – it is free!

Q. Is there any possibility that institutions could get a staging server to test out and iron out quirks with NGI and portal before they set it live?

A. This depends on your edition and contract – customers on the Enterprise private cloud editions can get a test tenancy set up on their instance. Are there particular areas of functionality you are concerned about? It would be great if you can share more detail with our support team as we want to support you in this transition as best as possible. For Portal specifically, there may also not be a need for a staging server as you can parallel run Universal Access and Portal, so your UA remains the default until you get Portal ready. They both expose the same content, but settings for Portal are managed separately and fully within the New Generation interface for ease of use, allowing you to get it ready without impacting your current Universal Access setup.

Q. One touch publication to Universal Access/Portal is a security concern. Are there plans to make publication four eye like deletion?

A. This was touched on by Helena in the briefing. The concern over how easy it can be to change security tags is a key theme within security fortification on our roadmap. We will have more updates on this as the year goes on.

Q. Should I change from classic to NG before taking the Academy courses?

A. The Academy courses are designed to help you pick up the New Generation interface and will make it easier to get started with New Generation. You may find it easier to follow the course after taking a few minutes to familiarize yourself with the new interface.

Q. Will the transforms be transferred to the portal?

A. Yes - we intend to change the API that is being used for metadata display on Portal as this is why your transforms aren't currently showing up. This is on our backlog but not scheduled into the next release (we plan one release ahead) so we can't give an ETA right now so please stay up to date with our release notes in the Community hub.

Q. The options for branding in "Style My Portal" are quite limited. My web team would love to see more options for CSS, colors, typography, etc. in order to conform with our organization's brand. Will we see more options in "Style My Portal" in future?

A. We are not currently working on adding more customization options but we are gathering feedback about what further customization you would like to see. It would be great if you could share more specific feedback about your branding requirements with us on helena.pilih@preservica.com. Some of the feedback we've received so far is about customizing link colors within text, having the ability to customize with more than 2 colors (especially for brands where 1 of the 2 colors isn't accessible so usage is limited), and the ability to customize font.

Q. Universal Access has often been inaccessible for us in the past 6-7 days. Is this due to adjustments with Portal? Is it possible to be notified of UA outages in the future? We occasionally promote new material made public on UA, so it would be good to have information on planned/unplanned outages.

A. Universal Access and Portal don't have any bearing on each other in terms of accessibility so Portal shouldn't be the cause of any downtime. We'd ask that you please raise a ticket with our support team in the moment when you see that your Universal Access is inaccessible so we can further investigate our system. Sorry for the inconvenience here!

Q. We would like to collect additional metadata from users via submissions. Are there plans for adding additional fields to submission invites beyond submission name and content description, or other solutions for collecting user-generated metadata submitted directly into Preservica?

A. We are targeting this for Q4 '25 / Q1 '26. As we get closer to scoping out the exact solution, we might reach out to you for further feedback so we can better understand your needs and use case if you wouldn't mind sharing.

Q. When will users be able to apply custom metadata on ingest, using the spreadsheet model available for Dublin Core and MODS?

A. This is a priority for us in Q2 this year. We are currently scoping and refining this feature ahead of starting work on it in the coming weeks.

Q. How will user data be protected with the introduction of AI?

A. Firstly, The PII has to be turned on by Preservica, and then turned on by a Manager of the Tenancy. Secondly, even when turned on no data leaves Preservica in this process. So it is secure, as is any other data in Preservica.

Q. Do customers have a choice to be excluded from the AI features, if we are unsatisfied with how our data will be used?

A. Yes - absolutely the choice is built in (twice). The system admin has control to leave AI disabled and the Organization has to request that it is enabled. Then the Manager role then has control to use it or not and no data leaves the system.

Q. When will you be deprecating the migration settings area?

A. We are roughly targeting this for our May release. The Preservation policy editor within the New Generation interface offers the same functionality and we have made it clearer and easier to use so there shouldn't be a need to still use the Migration Settings area.

Q. Starter keeps logging you out after a while and ingests cannot be completed. Have you a solution for that?

A. We're aware of logouts connected to content smaller than 4GB. This has been addressed in the recent January release. Please try ingesting the same assets again. If your session is still timing out, please reach out to support.

Q. What is being done to improve U.A. speed?

A. For some customers (especially with complex search indexes), the speed of Universal Access is impacted when searching. We are undertaking significant improvements to our search tooling starting in Q2 (May and July releases) which should improve search performance within the interface as well as on Universal Access / Portal. If it's not search that you are seeing speed issues with, then please do raise a ticket with our support team so we can further investigate the source of the issue for you.