



Next Stop Q&A

Supporting your transition to Preservica's enhanced, modern interface

Q. Are there any plans for making it possible to customize the 'Contact Us' email form on Portal so that messages are sent to a specified email address?

A. Yes, this is in our March release.

Q. Can we manually migrate content in NGI if we don't have automated preservation yet (or for content not covered in the automated preservation)?

A. The manual migration workflows are still available and you can use them until you have automated preservation.

Q. Can you explain the decision to limit the view options (card, list, grid) to different Preservica editions? It's disappointing to lose functionality when using the new version.

A. With the March release, we're expanding the availability of grid view to our Professional and Professional Plus editions in the New Generation. By expanding access to more editions, we're offering all customers who are moving from the old Classic interface access to our most powerful content visualization. The Free and Starter Plus editions have always had access to the card view and list view options.

Q. Have there been any updates on when NGI will have more integration with ArchivesSpace cataloging workflow settings? One of the biggest obstacles for us to adopt NGI is being able to use the necessary workflows to facilitate this relationship between Preservica and ArchivesSpace.

A. This is on our roadmap for this year, currently targeted for Q3. If you have specific requests or concerns around these features, please do let us know via support@preservica.com.

Q. In classic, there is a Deletion Approval role. In NGI, are any manager roles allowed to approve deletions?

A. The 'Delete Entity' permission is required to delete content. The Manager approving the deletion must be different from the user who requested the deletion.

Q. Is Reference Metadata only enabled for Professional Plus and Enterprise editions in Next Generation, as it is in the old interface?

A. Reference metadata is also available in the Professional edition customers in the New Generation interface. Professional edition users currently have access to one reference metadata table in the New Generation.

Q. Is the batch metadata you have set to a folder already applied to new ingests (digital assets) put into that folder?

A. Metadata will not apply automatically to asset in the folder but users can use bulk edit metadata in New Generation to apply shared metadata to a folder and its assets at scale.

Q. Looking at the timeline, am I right that the Calm integration won't be possible until at least October? And that we won't be able to ingest content with custom metadata schema until at least July?

A. We plan our roadmap in quarters and as we get to the quarter, we then plan releases within that quarter. Linking your CALM metadata is on our Q3 but we haven't yet planned releases for this quarter - we will do that as we get closer to it - which is why we are currently saying "by October" as that would be the last release within Q3. In terms of metadata import, we have planned enhancements for this targeted for both the May and July releases so we may be able to support your needs earlier than July.

Q. When will Classic no longer be available/supported?

A. Preservica is focused on enabling customers to adopt our New Generation technology and the many benefits it brings, we are encouraging all customers to begin their migration journey now so we can gather feedback on your experience and needs. As we execute against our 2025 roadmap, and in parallel with our customers feedback, we anticipate announcements regarding the future of the Classic Interface to be made later in 2025.

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 on our roadmap for Q1 of this year and is currently in development.

Q. Will the Ingest enhancements include the addition of options for adding difference checksums?

A. The checksum algorithm you choose to set will apply to all your content ingested in Preservica. Multiple checksums can be applied using the OPEX Ingest method and if the checksums supplied in your OPEX Ingest are different to your default then both, or all, apply.

Q. With catalog linking on the roadmap for an October timeline, does that include users that have ArchivesSpace linked with their Preservica Professional instance? Will all that catalog metadata transfer over?

A. Your catalog metadata should already be visible within NewGen - if it's not please do reach out to our Support team so we can fix that for you. However, you cannot yet manage your catalog schemas and indexing within NewGen or link catalog metadata. Both of these are currently targeted by October though this may change. With ArchivesSpace in particular, we know that you need more complex indexing settings within NewGen and we are currently investigating how we will support that.

Q. Is there a specific date for the March release?

A. Not for our customers. We have an internal target date for when we want to start upgrading customer systems so when exactly you get the upgrade will depend on the system you are on. Our current internal target for the March release is the last week of March.

Q. The A-Z sorting doesn't recognize number logic. For instance, when listing series within our fonds, they are listed as Series 14, Series 15, Series 18, Series 6.

A. Thank you, for letting us know. We will raise the issue and get it looked into.

Q. When will the search functionality in Portal be functional (the dropdown list to search by a specific field)?

A. Improvements to the search functionality in Portal are on our backlog but not currently confirmed onto our roadmap.

Q. I think I just heard that "Metadata management limited to metadata created with new generation" - what does that mean for batch editing metadata from previously ingested (previous generation)? In terms of schema, can we update past ingests to a new schema (both back end and as it presents online/UAP)?

A. In this context New Generation is referring to the New Generation Interface and not new representations. In New Generation Interface it is not yet possible to manage settings for schemas set up in classic. This is an area that is under review and we are working towards resolving.

Q. How do we find out more detail about each of these implementations? eg what does 'catalogue metadata linking' mean? Does it encompass ingest and link workflows?

A. We are working on adding management of ingest workflows (excluding web harvesting) into NewGen within Q2 so by July. Managing catalog linking as part of ingest is currently targeted for Q3.

Q. Can you share the outputs of any accessibility testing which has been undertaken on the new generation interface? Including any independent/external testing

A. We have undertaken internal testing which we are using as the basis for our accessibility roadmap that we are continuing to make progress on with every release. If you have concerns about any specific areas or you undertake external testing, we are open to hearing any feedback from that and will consider it for our roadmap.

Q. Will the ability to view the XML of metadata be available in new gen?

A. This is something that has been raised and is currently under consideration as an Enhancement but not confirmed.

Q. We have been using various functions in both classic and NGI to complete Opex ingests. Will there be a function in NGI that mirrors the "monitor" function currently in classic that lets you see specific errors/warnings and post ingest tasks that may occur during ingests?

A. Yes, we are working on bringing the Process Monitor into the New Generation Interface, redesigned but with the same level of warnings and errors you're already used to.

Q. Can we choose what checksum algorithm is used?

A. Yes, if you go to the Settings page in the new generation interface you'll be able to set your checksum algorithm that's used upon ingest.

Q. Can you assign bulk access restrictions on the results of the PII search?

A. It is not currently possible to perform a bulk change of security tags on a set of search results.

Q. I have been unable to find the "Create a linked item" in NGI. It is not within "Change Archival Structure" like it is in classic. Is this feature in NGI?

A. This feature has not yet been added to NewGen but it is on our roadmap (not scheduled into a release yet).

Q. This might be a tangent, but are UAP links (public facing links to a webpage for an asset) permanent links? For example, if you share a URL today, can we plan on that link to direct to the same page even if the URL changes in the future?

A. No, our links are not guaranteed to be permanent. We do our best to maintain redirects and ensure that your links continue to work but we cannot guarantee that will always be the case.

Q. Do you know when the two step security tag change will be available in NGI as it is in Classic? That is an absolute stopper for us. Thanks

A. Thanks for letting us know it's a stopper for you - we'll take that feedback on board. Making it harder to change security tags within NewGen is on our roadmap this year (Apr '25 - Mar '26) but isn't scheduled into a release yet.

Q. Is bulk edit metadata change still limited by user roles?

A. Yes, system user rolls need to be associated to the 'Update Metadata' Permission.

Q. Regarding two stage delete in NGI: I've been given an error when I go to submit a deletion for approval that basically says I don't have permission to delete anything. Is there a way to change my permissions so I can submit items for deletion?

A. Yes, if you go to Manage Accounts > Users to check which role you have first. You may need to update the role to include the 'Delete Entity' permission.

Q. When will users be able to apply custom metadata on ingest, according to the roadmap?

A. This is on our roadmap for Q1 of this year and is currently in development.

Q. Are there plans to include the equivalent of the "Advanced" and "XML" tabs in NGI?

A. With particular emphasis on the information shown on the Advanced tab, there are plans to bring this to NGI in future releases.

Q. What are the drag & drop size limits for ingest?

A. 50GB is the maximum size for Drag and Drop Ingest.

Q. Can we choose what checksum algorithm is used upon ingest?

A. Yes, if you go to the Settings page in the new generation interface you'll be able to set your checksum algorithm that's used upon ingest.

Q. Will Preservica Academy ever be available to non-users? When recruiting a digital preservation role recently lots of candidates lacked experience with using Preservica so I encouraged them to sign up to Starter but this might be a development activity for those looking for experience before applying to Preservica-using organisations

A. Creating a free Starter account and taking the Preservica Academy courses are great ways to quickly learn about how to use Preservica effectively. Completing the courses and gaining certifications gives candidates a competitive edge and demonstrates their commitment to mastering their digital preservation skills.

Q. What if you want to check PII on assets already ingested?

A. It's not currently possible to check for PII on already ingested assets, although this is something we are actively looking into bringing forward for a future release.

Q. When will users be able to export items from Glacier storage in NGI?

A. We are currently working on a new 'Downloads' feature in NewGen to replace the need for Exporting in Classic. The first pass of this feature is planned for the June release, this will include the ability to download multiple assets stored in Glacier.

