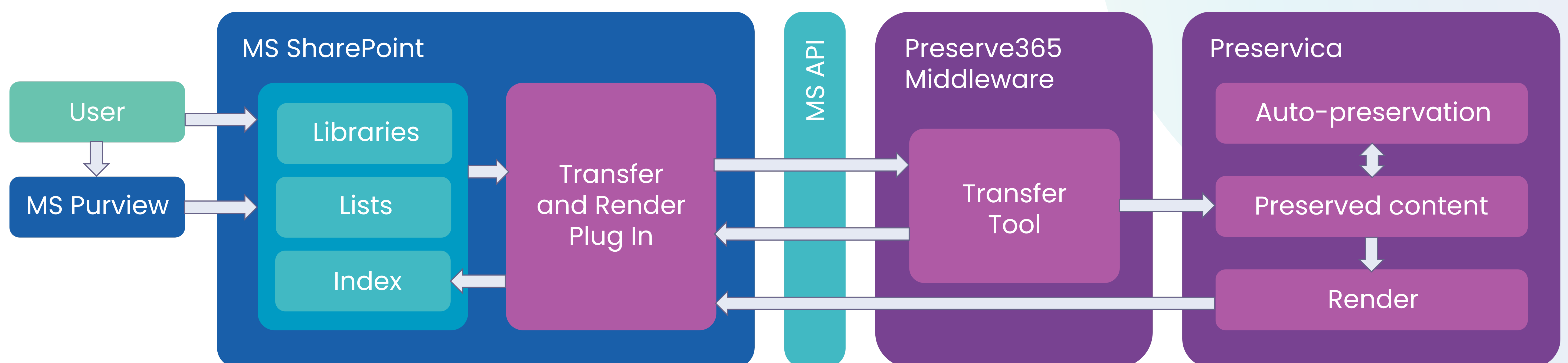


SharePoint information

- ✓ Library: File hierarchy, one file per record, user and system metadata
- ✓ Lists: Emphasis on tabular metadata, zero to many attachments, folder hierarchy
- ✗ Sites: Website based data presentation

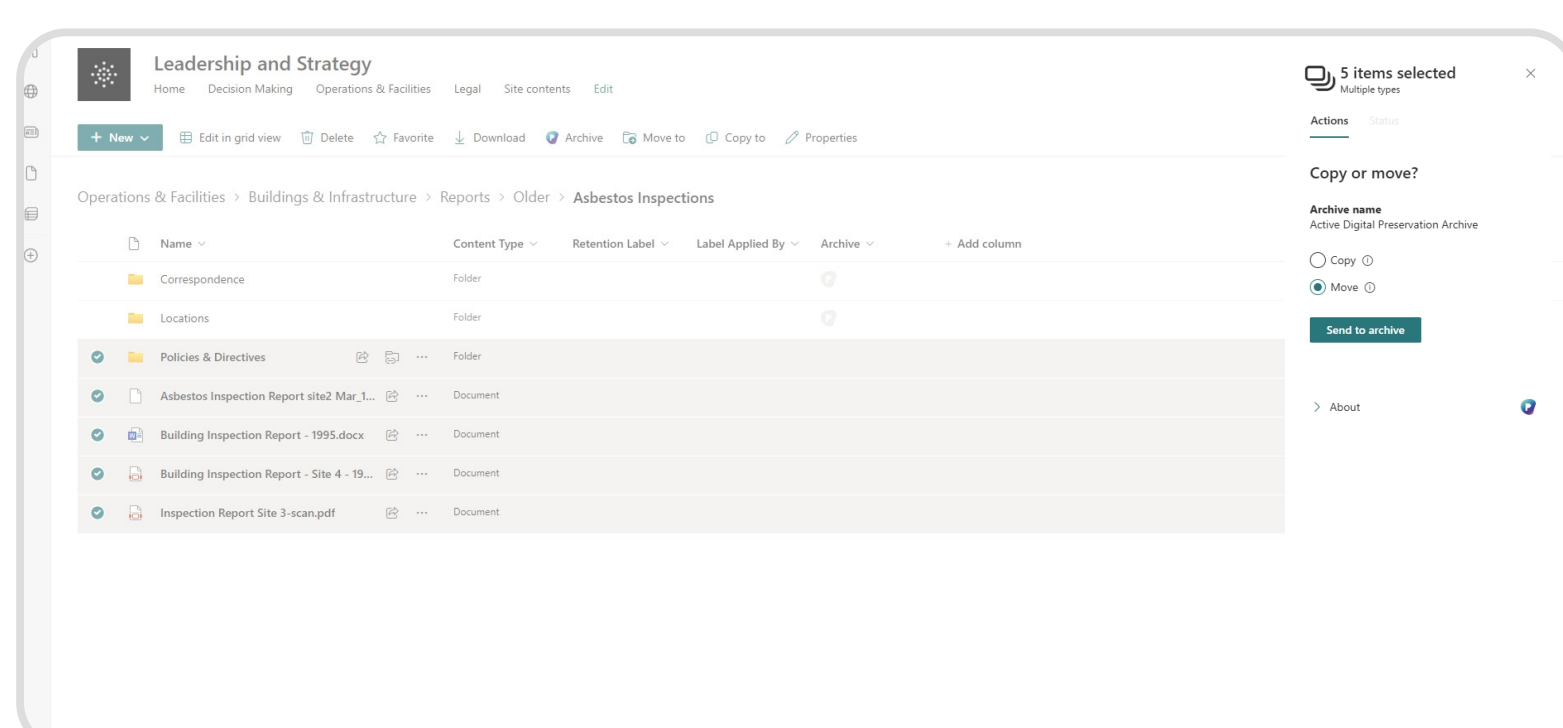
Alternate Integration Models

- ✗ Web archiving: Easy to do for Sites but lossy for Libraries and Lists
- ✗ Extract, Transform and Load: End of life transfer using export tools but no SharePoint user control
- ✗ Browse and extract with API & external application: Can't be done inside SharePoint
- ✓ Tagged transfer using API: Use user metadata or retention or sensitivity labels to extract and transfer data
- ✓ Transfer plug-in: Users can configure and transfer data inside SharePoint
- ✓ Search and Render plug-in: User can search and render preserved content in SharePoint



Preserve365® Key Features

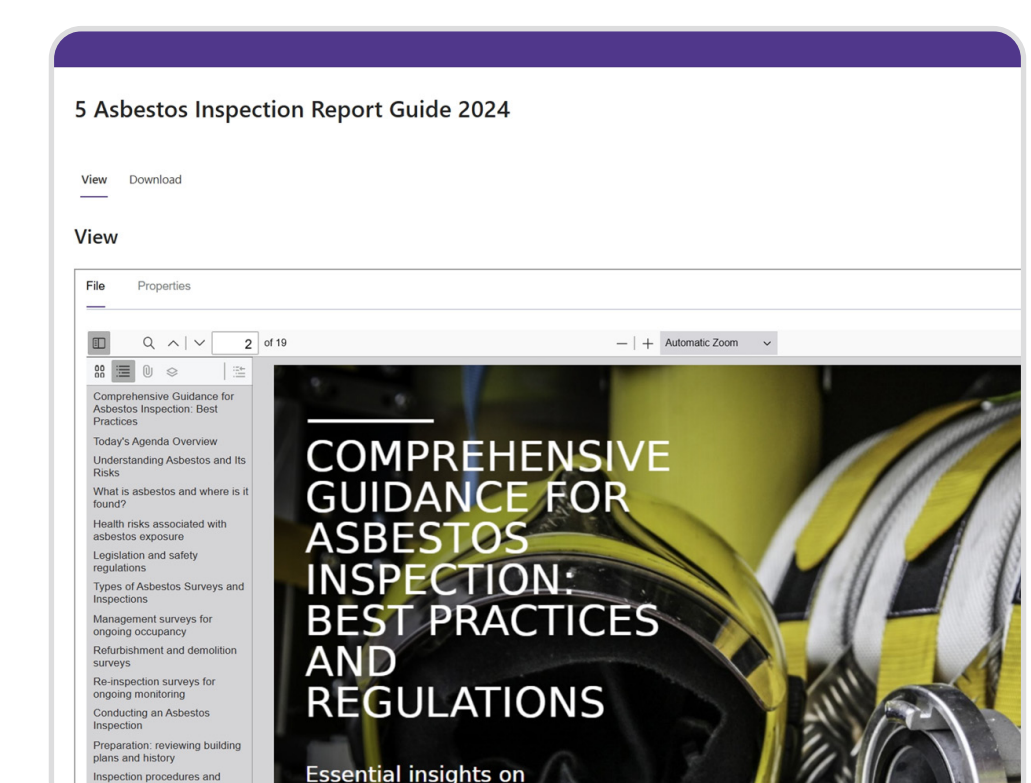
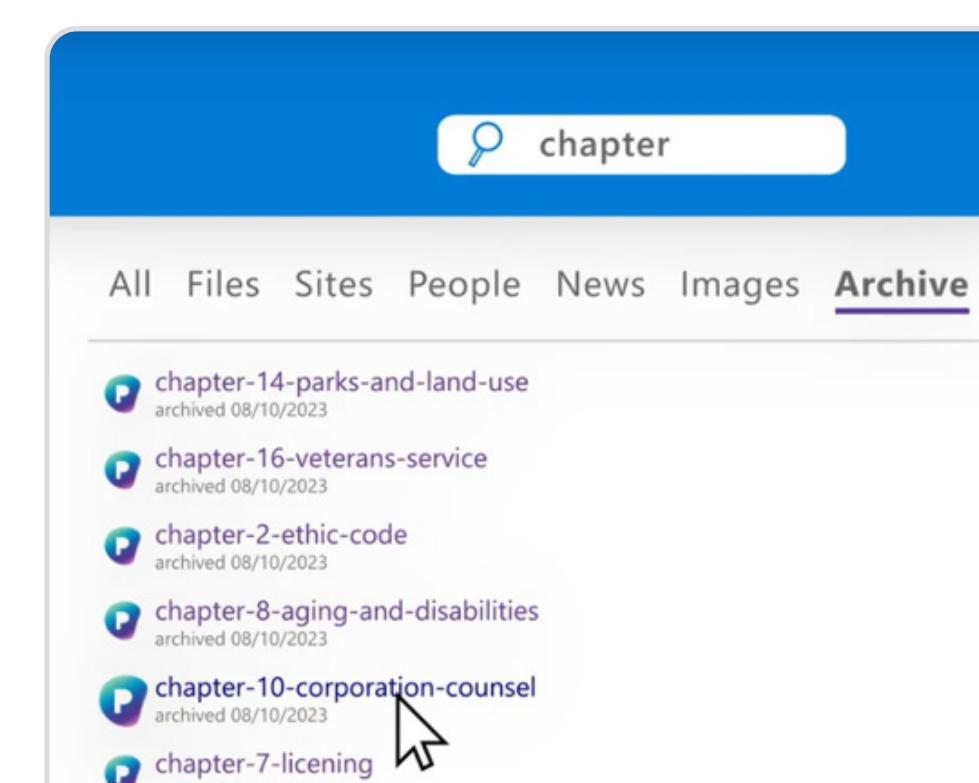
- Middleware application presents a GUI within Microsoft and transfers data to and from SharePoint and Preservica
- Transfer plug-in allows users to select data from Libraries or Lists and move or copy



- Background application searches for items tagged with specific retention labels, sensitivity labels or metadata fields which are moved or copied for Preservation
- Compatible with Copilot, Purview, PowerShell
- Preserved content is indexed within SharePoint to allow search from within the Microsoft world
- A render plug-in allows users to render Preserved content within SharePoint

Preserving SharePoint Records in Preservica

- Multi-part asset comprising the metadata in JSON, content files, complex metadata files (images, rich text)
- JSON contains all SharePoint user and system metadata for the record and is fully preserved
- SharePoint metadata also in XML for search
- Record hierarchy is maintained
- Middleware transfers complete packages which get the full DP ingest workflow
- Formats migrated according to Preservation Plan which can be changed post-ingest
- Preserved items are indexed within SharePoint index with original access control
- Specialist render of complete Library or List item within Preservica and SharePoint with all metadata (user defined and system)



Challenges

- Significant software development costs
- Microsoft API extensions and updates, but Microsoft were a great partner
- Large data volumes
- Applications need elevated permissions
- Some MS features require expensive licenses
- Transfer validation limited by changes to content on exit from SharePoint

What Next (all work in progress)

- Further integration with Copilot to drive transfer and enable content use
- Preserving multiple versions of records
- Preserve emails from Outlook
- Preserve chat, meetings & channels in Teams
- Preserve files from OneDrive