

1990



2001



2016



# Preservation Planning for a Personal Digital Archive

Paul Wilson

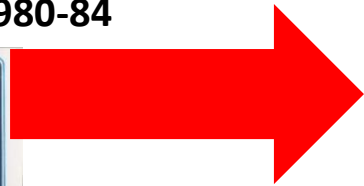
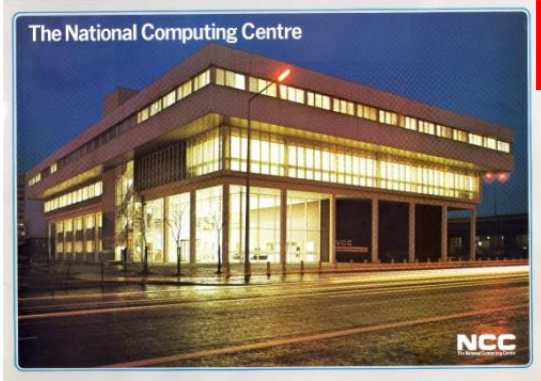
[pwilsonofc@btinternet.com](mailto:pwilsonofc@btinternet.com)

DPC Webinar, 29<sup>th</sup> June 2016

# How I got into this

2

Office Technology Division, 1980-84

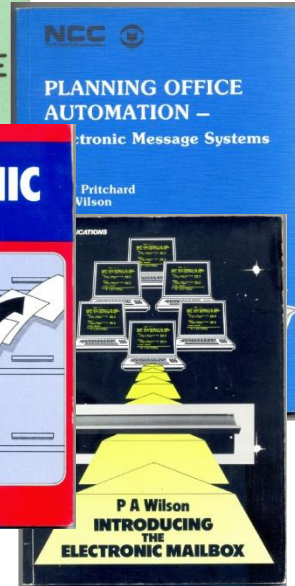
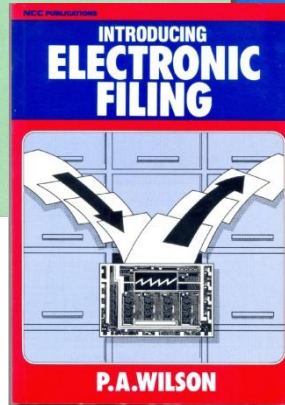


## Seek out Best Practice

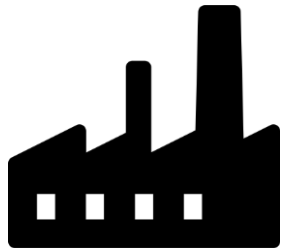
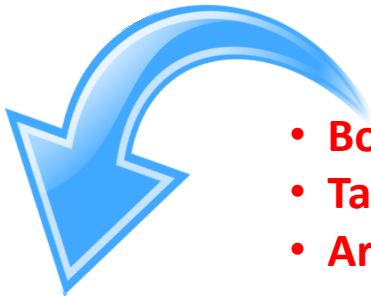
- Visits
- Papers
- Conferences



- Books
- Talks
- Articles



Personal experimentation

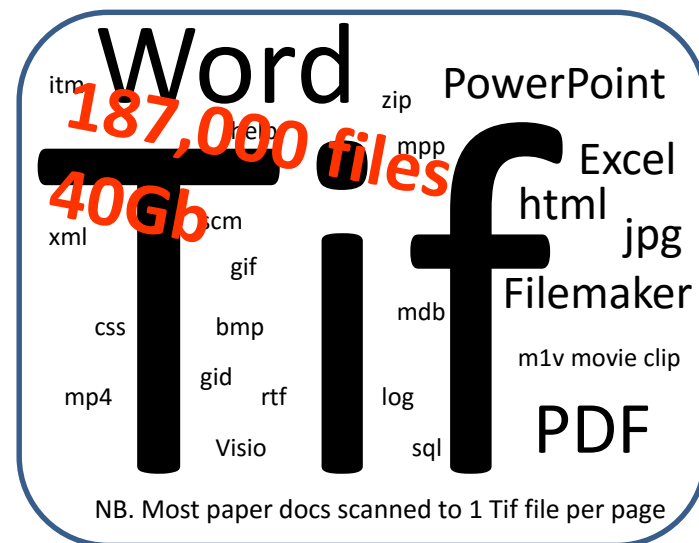
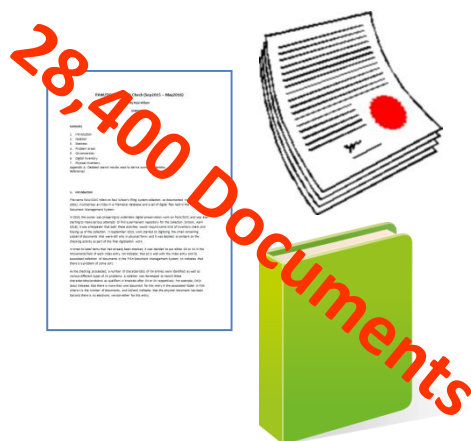
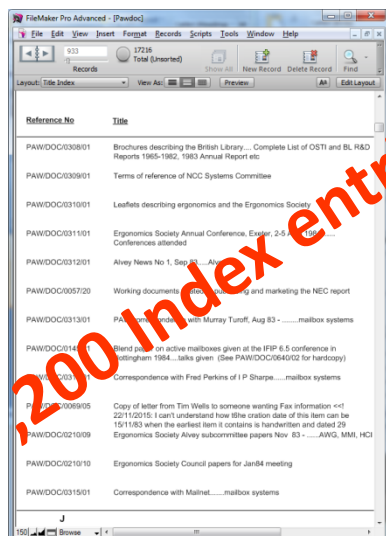


UK Economy

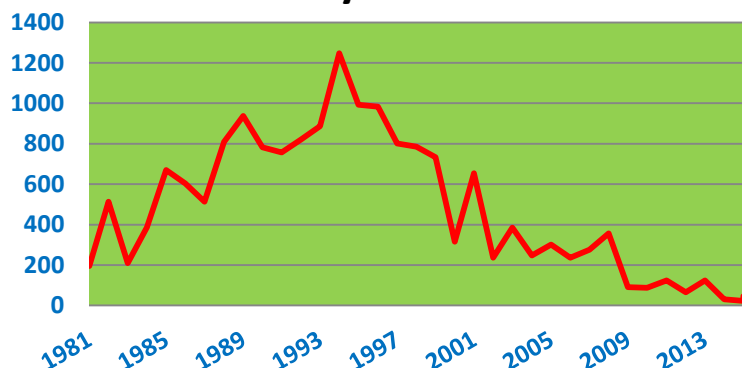


# Collection Contents

3



## Index Entry Creation Rates



Information Type	
Info in Index only (no document)	150
Ref to document not in collection	200
Original was a paper document	16400
Original was an electronic file	12000



# Preservation by another name

4

## Backing-up



Photocopy of  
Index Cards



Printout of  
Title Index



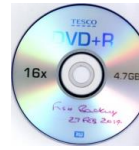
230Mb Magneto-  
Optical drive



CD 650Mb



DVD 4.7Gb



Remote  
Storage

External  
Hard drive



## Hardware Upgrade



Apple  
Mac  
Plus  
1986

Apple  
Mac  
SE  
1988

Compaq  
LTE  
Lite 2.5  
1993

Compaq  
LTE Elite  
4/40CX  
1994

Dell  
Latitude  
Xpi CD,  
1997

Dell  
Latitude CP-X  
2000 - stolen  
in 2004

IBM  
ThinkPad  
T40  
2004

Lenovo  
T61

Acer  
Aspire  
4830T  
2011

## OS Upgrade



Mac  
System 3.2  
1986

Mac  
System 5  
1988

Windows for  
Workgroups  
(3.11) 1993

Windows  
95  
1996

Windows  
98  
2000

Windows  
XP  
2003

Windows  
7  
2011

Windows  
10  
2016

## Index Software Upgrade



Filemaker  
Plus, 1987

Filemaker  
Plus 2.1,  
1989

FmPro,  
1993

FmPro 3,  
1996

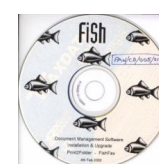


FmPro 15,  
2016

## Doc Mgmt Software Upgrade (Paperclip rebranded to Fish)



Paperclip, 1996



Fish V5.2, 2000



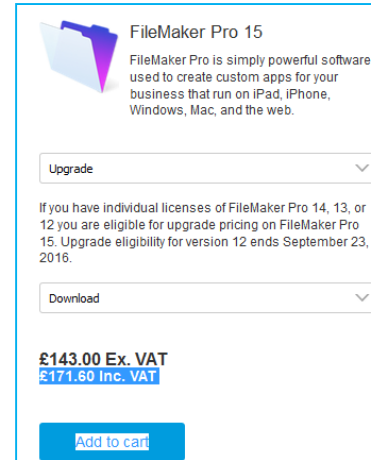
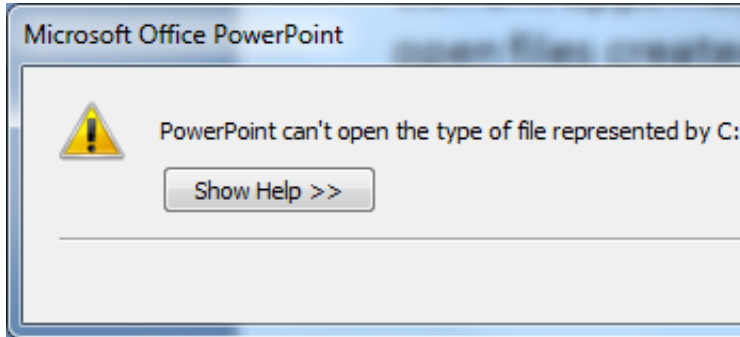
Fish V5.4, 2004

Fish v5.5  
2011

# Preservation concerns

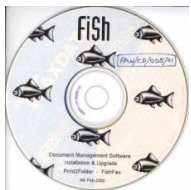
5

Current apps may not open  
files created in older versions

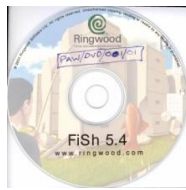


The Index  
software  
(Filemaker)  
keeps  
upgrading  
at £170 a  
time

The Document Mgmt software,  
Fish, may be close to end-of-life –  
only being maintained for existing  
customer base



V5.2, 2000



V5.4, 2004



I no longer have the  
software with which  
some files were created

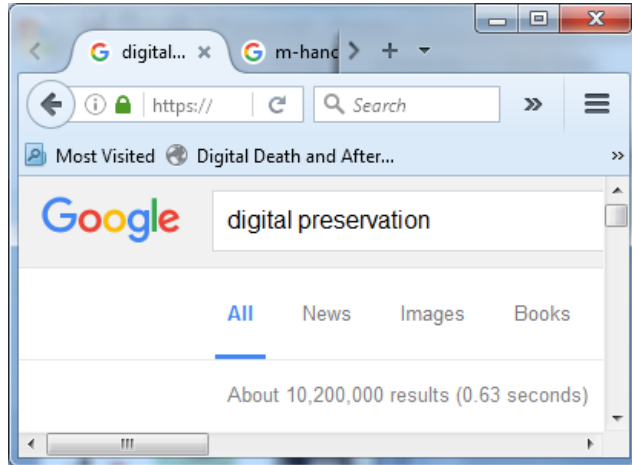


# I needed a Preservation Plan of Action

6

But.... The DP field is (understandably):

- Huge



- Mainly aimed at institutions and large collections

*"The British Library is increasingly a digital library. Our digital library store already holds over 11,500,000 items and more are added every day"*  
British Library Digital Preservation Strategy, March 2013

- Often complex, for example...

- Reference Model for an Open Archival Information System (OAIS) produced for the Space Data System Community
- The PLATO online tool produces a plan in XML and PDF format which can then be executed by other software

I wanted:

- Guidance for a small collection owned by an individual
- A simple process
- A solution that would deal with immediate problems AND address longer term requirements

# Notional Planning Components

7

Digital  
Preservation  
Literature

Conversations

## Scoping Document

Preservation Planning Scoping Document for Paul Wilson's Manuscript Collection

Collection Name: Paul Wilson's Manuscript Collection

General Information and Special Electronic Files

Component	Collection	File Format	File Size	File Count	File Type	File Description
Manuscript	Paul Wilson's Manuscript Collection	PDF	1.2 MB	1	Text	Manuscript of Paul Wilson's Manuscript Collection
Image	Paul Wilson's Manuscript Collection	JPEG	1.2 MB	1	Image	Image of Paul Wilson's Manuscript Collection
Audio	Paul Wilson's Manuscript Collection	MP3	1.2 MB	1	Audio	Audio of Paul Wilson's Manuscript Collection
Video	Paul Wilson's Manuscript Collection	MP4	1.2 MB	1	Video	Video of Paul Wilson's Manuscript Collection

Scoping assessment

1. Why does this need to be done?

2. What are the goals of this project?

3. What are the risks of this project?

4. What are the benefits of this project?

5. What are the challenges of this project?

6. What are the resources of this project?

7. What are the timeline of this project?

8. What are the deliverables of this project?

9. What are the stakeholders of this project?

10. What are the communication of this project?

11. What are the evaluation of this project?

12. What are the conclusion of this project?

## Project Plan Description

FAW-PERS Preservation Project Plan DESCRIPTION

Author: Paul Wilson

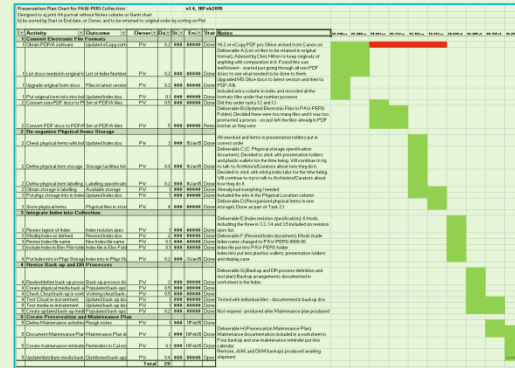
Collection Owner Approval: Paul Wilson, 1/20/2014

System Approval: [Signature]

Date and version of this document: 1/2/2014

Doc Ref: FAW-PERS Preservation Project Plan DESCRIPTION, v1.0 - 1/2/2014.doc

## Project Plan Gantt Chart



## Preservation Maintenance Plan

FAW-PERS Preservation Maintenance Plan

1. Purpose: This document describes the plan for the preservation of the FAW-PERS collection. It is intended to be used as a guide for the preservation of the collection.

2. Scope: This document applies to the FAW-PERS collection. It is intended to be used as a guide for the preservation of the collection.

3. Objectives: This document describes the objectives of the preservation of the FAW-PERS collection. It is intended to be used as a guide for the preservation of the collection.

4. Tasks: This document describes the tasks of the preservation of the FAW-PERS collection. It is intended to be used as a guide for the preservation of the collection.

5. Resources: This document describes the resources of the preservation of the FAW-PERS collection. It is intended to be used as a guide for the preservation of the collection.

6. Timeline: This document describes the timeline of the preservation of the FAW-PERS collection. It is intended to be used as a guide for the preservation of the collection.

7. Deliverables: This document describes the deliverables of the preservation of the FAW-PERS collection. It is intended to be used as a guide for the preservation of the collection.

8. Stakeholders: This document describes the stakeholders of the preservation of the FAW-PERS collection. It is intended to be used as a guide for the preservation of the collection.

9. Communication: This document describes the communication of the preservation of the FAW-PERS collection. It is intended to be used as a guide for the preservation of the collection.

10. Evaluation: This document describes the evaluation of the preservation of the FAW-PERS collection. It is intended to be used as a guide for the preservation of the collection.

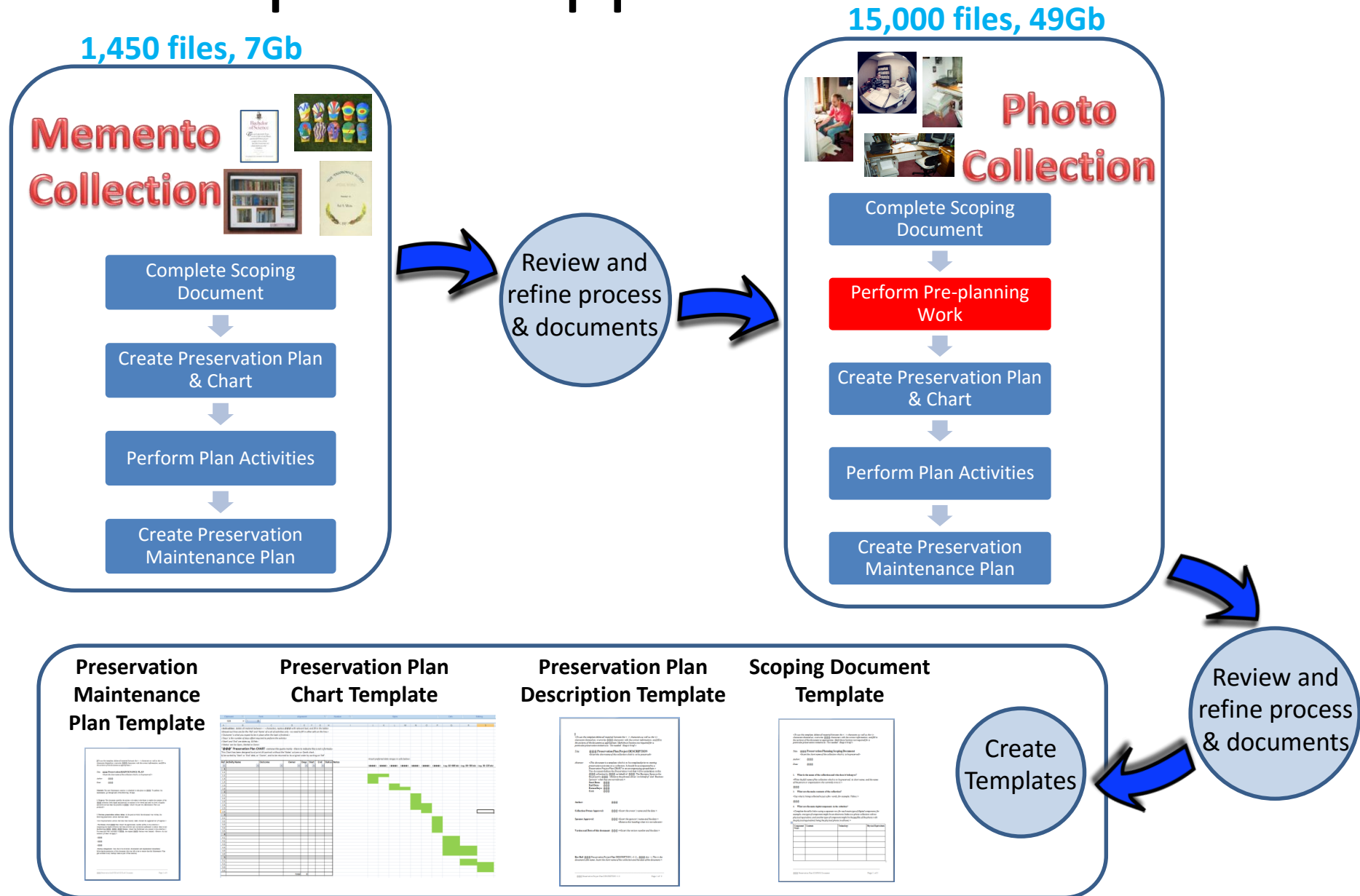
11. Conclusion: This document describes the conclusion of the preservation of the FAW-PERS collection. It is intended to be used as a guide for the preservation of the collection.

DPC 12 step preservation  
planning exercise sheet

This formed the basis of  
the Scoping Document

# Development Approach

8





# Process & Document Contents

9

## Scope the work

- Name and contents
- Hardware & Software
- Risks
- Pre-work required to produce plan
- Costs & resources



## Do the pre-plan work

- Technology platform strategy
- Risk mitigation options
- File conversion strategies
- etc



## Create the Plan

- Scope - components
- PAC-R (Principles, Assumptions, Constraints, Risks)
- Project Management
- Milestones & Deliverables
- Task Breakdown
- Budgets & cost
- Timeline (chart)



## Do the planned activities



## Create the Maintenance Plan

- Schedule
- Define technology strategy
- Perform inventory check
- Define/implement file conversion requirements
- Define next version of maintenance plan
- Review/update backup arrangements

## Note:

- May not be suitable for less-structured personal collections
- May be suitable for small institutional collections
- Needs to be refined by use and lessons learned

**Use Process and Templates  
on Personal Document  
collection**

**I'm seeking  
collaborators –  
please get in touch  
if you're interested**

**Refine Toolset from  
lessons learned**

**If the Templates are of  
use, it may be better for  
an organisation to take  
ownership and refine  
them**