Why are we all here?
An Introduction to ‘Unbroken Records’
Jenny Mitcham (Head of Good Practice and Standards)
Some background

• It all began in November 2018 when the DPC started working with the UK Nuclear Decommissioning Authority (NDA) on a digital preservation project

• The preservation of records in Electronic Document and Records Management Systems (EDRMS) was highlighted as a priority topic by the NDA
  – It became one of our case study areas to investigate further
How to tackle the challenge?

• Is there a solution to EDRMS preservation?
  – No universal answer to this challenge
    • Lots of different EDRMS and preservation systems
    • Different approaches that could be taken
  – Challenge is shared by many DPC Members
    • Some further on with solutions than others
  – Best way of helping is to get Members together to discuss good practice and share experiences
EDRMS Preservation Task Force

• Call for members went out in January 2020
• First meeting held in March 2020
• Monthly meetings
  – Presentations
  – Discussions
  – Brainstorming
  – Networking
• Initially planned to run for 6 months...
Task Force Members
Questions and challenges

• How safe are records held within an EDRMS? Are there specific risks in leaving them where they are?
• When should records be transferred to a digital archive? What are the triggers?
• How can records be extracted from the EDRMS?
• Which metadata associated with the record should be captured and maintained in the digital archive? What is the minimum? What else would be nice to have?
• Which parts of the process can be automated?
• How can users continue to access the records (where permissions allow)?
Task force will address these by...

- Articulating the challenge/s of preserving records from an EDRMS
- Sharing experiences of tackling these issues and learning from each other
- Highlighting other useful case studies or examples of good practice
- Gathering together existing sources of guidance
- Highlighting gaps in current guidance
- Making recommendations for concrete DPC outputs or events to help address the challenge (for example: briefing day, technology watch report, guidance notes, case studies, webinars, blog posts)
Scope of the task force’s work

• The task force considered the preservation of records within an EDRMS
  – For example OpenText, Objective, HP Records Manager, Autonomy Records Manager

• Other systems that institutions use in place of an EDRMS (sometimes known as Document Management systems) were also considered relevant
  – For example Sharepoint, Google Drive and some elements of Office 365
(Virtual) booksprint

We held a virtual booksprint to create a web resource on EDRMS preservation, including:

• Generic advice and guidance
• Case studies
• Further resources
The resource will include sections on:
• Preservation challenges
• Preservation approaches
• The preservation process (10 steps)
• Metadata
• Horizon scanning
• Further resources

...and will contain several case studies
Thanks for listening