Whole-system EDRMS Preservation

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Stabilize  
Solving digital infrastructure obsolescence
Agenda

1. New opportunities for managing EDRMS lifecycles with whole system preservation
   (Euan – Stabilize, 10 Minutes)

2. Case Study: Emulating Legacy Systems at Gates Archive
   (Sally, Andrew, Gates Archive, 10-13 minutes)
Retain Access to Legacy Systems

- EDRMS (e.g. Objective, OpenText, Documentum)
- Intranets (e.g. Notes/SharePoint)
- Databases (e.g. MSSQL, Oracle)
- CRM Systems (e.g. Dynamics)
- Web Servers
- ERP Systems (e.g. SAP, Odoo, PeopleSoft)
New opportunities for managing EDRMS lifecycles

✓ Secure access to entire EDRMS and other records-containing systems past end of support

✓ Recover live-access to entire legacy systems (e.g. EDRMS) from backups

✓ Insure against data loss and ensure legal compliance during system upgrades or records disposal projects

✓ Retire legacy systems gracefully in stages (transfer records and retain)
Demo

Available at https://stabilize.app
And https://youtu.be/tvdJq-4kSDw
New opportunities

1. Retain access to entire EDRMS indefinitely

2. Transfer records to an archive and retain access to the original EDRMS in non-edit mode

3. Gracefully “sunset” legacy systems with a phased retirement approach

4. Recover records locked in legacy data backups

5. Respond to records access requests quickly with print-to-PDF and data export tools
Thank you

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https://stabilize.app
Case Study: Emulating Legacy Systems at Gates Archive
Donor organization was retiring several legacy systems core to business operations and we knew majority of records in these systems were of high value.

Some were custom web applications, other were SharePoint-based applications. We also have other software in our holdings.

Considered flat exports from systems or SQL backups but making meaning of data or reconstituting the records requires queries. The original, custom applications provide optimized, built-in ways of accessing complex data.
Other considerations before we decided to emulate

Tech support
We knew we would want vendor support for emulation.
We also knew we would need system administration support to set up complex networked applications in an emulator. Consumer software and other applications with more straightforward installation processes can be set up directly by archivists.

Information security
Old software has vulnerabilities. We are working closely with Stabilize and information security to ensure we can emulate systems and output data while keeping our networks safe.
Donor decommissioning process

**System 1 - SharePoint application** – Donor exports .cmp file(s)

**System 2 - Custom web application** – Donor packaged up:
- .vhd files
- several SQL backups
- spreadsheet with system requirements
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</table>
How we set up applications in Stabilize

**System 1 - SharePoint application** – create machine in Stabilize, install Sharepoint with license keys, load CMP data, create user accounts.

**System 2 - Custom web application** – Import .vhds into Stabilize. If needed, Create SQL machine and restore databases. Use Stabilize networking to interconnect machines.
Emulation challenges – application transfer and setup

Process tweaks
- Ensuring donor creates local accounts prior to transfer
- Asking for all system documentation and diagrams
- Being generous with time estimates for complex application setup

Future work required
- Where to source copies of legacy software needed to run systems?
- What metadata is needed to support standard accessioning?
- What standard process can we use to determine if we choose to emulate a system or migrate it?
Current state – early successes!

- Have emulated one major legacy system and nearly have the second running. Have already used to serve an access request!
- Small number of emulated systems mean archivists ‘know where to go’ to use these.
- Access to systems is internal, with archivists doing research in systems and outputting needed information.

Next steps – scaling up

- Creating consistent metadata and placing links to emulated systems in our collection management and access systems.
- More training and documentation on complex legacy systems so future users know how to use them – e.g. piloting recording a user walking through common uses before retirement.

Current and future state of access to emulated applications
Benefits

**Appraisal** – ability to work with data in original application

**Ready access** – we have already served an access request from an emulated application

**Migration** - Can make more deliberative choices about future migration

**System and environment segmentation** – ability to run legacy application with lower risk than if it was ‘live’
Questions?

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Julia Welby
Susanne Annand

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