

Product Brief

The Legacy Snapshot

Empowering the Immortal Enterprise



Table of Contents

01

Introduction

02

Meet Legacy Snapshot

"Empowering The Immortal Enterprise"

03

What Does a Legacy Snapshot Document Look Like?

04

How Do I Access a Legacy Snapshot

05

How Did Enterprises Retire Software in the Past?

06

Eliminate Risk Through Immortalization





01 Introduction

Despite the numerous benefits the "rush to modern" has brought to businesses, it's an open secret that it has also stirred up substantial disorder. The introduction of new, cloud-based systems, designed to enhance customer and employee experiences in line with current expectations, has paradoxically expedited the creation of more legacy systems than ever before. Regrettably, our strategies for retiring these older systems and transitioning data have not kept pace.

This disparity has resulted in organizations grappling with a growing pile of new technical debt. Additionally, inadequate change management strategies have left employees feeling bewildered about how these changes will impact their roles. Worse yet, the ever-growing "wilderness" of decommissioning has morphed into a hotspot for compliance and risk exposures. In short, organizations are faltering at system decommissioning, users are frustrated, and the problem is intensifying.

There are a variety of techniques available for preserving data from a decommissioned system, but these conventional methods can be tedious and often strip away the context inherent in the original system. This lack of context renders the data difficult to access and understand.

Imagine a scenario where organizations could swiftly and thoroughly decommission outdated systems, freeing themselves from the financial and operational burden of maintaining them. Simultaneously, what if they could preserve the valuable insights these systems contain in a format that is transparent and easily accessible? Wouldn't that be a welcome relief?



Introducing
Legacy Snapshot



02 Meet Legacy Snapshot *Empowering the Immortal Enterprise*

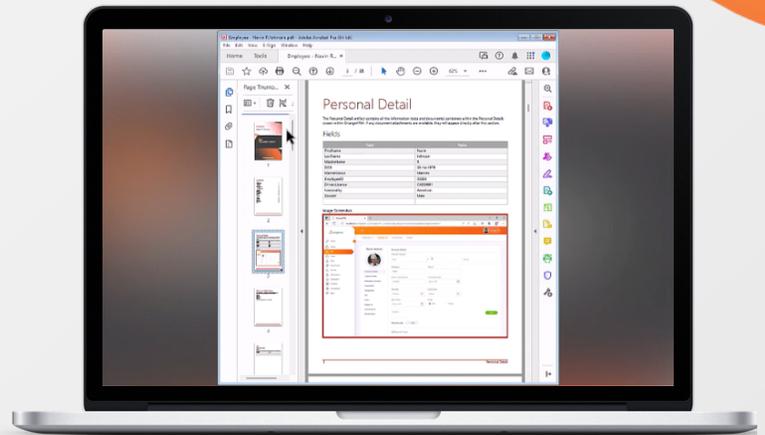
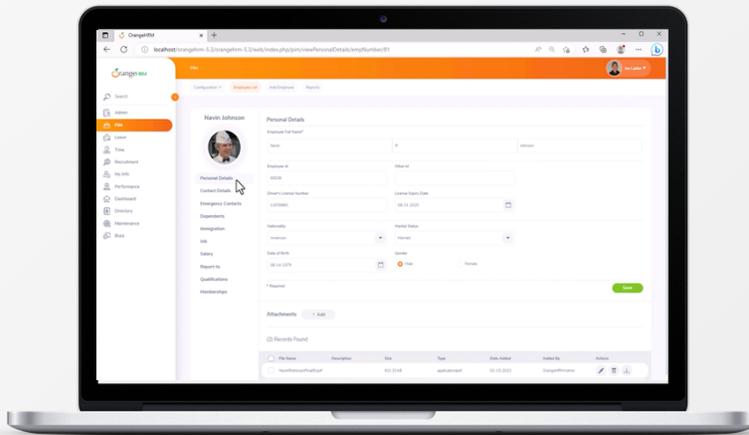
A Legacy Snapshot is a document-based representation of a legacy system created at the time of its decommissioning. It serves as a historical snapshot of the system, providing valuable insights into its structure, data, and functionality. Each document in the Legacy Snapshot corresponds to a record in the legacy system, which could represent an employee, customer, patient, or any other type of entity.

The process of creating a Snapshot involves transforming all or part of a legacy system, including its raw data, application screenshots, attached documents, and reports, into a series of digitally signed PDF documents. These PDFs can then be easily imported into an organization's enterprise content management system (ECMS) and treated like any other document set. Once imported in the ECMS, the Snapshot can leverage existing access controls, search and retrieval capabilities, and records retention governing policies.

Transforming Applications...



...Into PDFs



Whether you're creating a Snapshot as the sole representation of the original system or as a highly contextual companion to some other decommissioning strategy, creating a snapshot provides peace of mind knowing you've captured everything you need in a form that ensures guaranteed access for as long as it's needed. Legacy Snapshots immortalize legacy system information so you can rest easy and finally cut the cord with confidence.

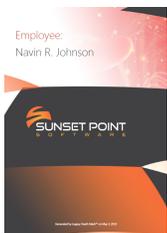
03 What Does a Legacy Snapshot Document Look Like?

Each document contained in the Legacy Snapshot ties back to a record in the legacy system. Most often, a record describes all the information related to an entity the business tracks such as a customer, vendor or patient. Within a Snapshot, the document that describes each individual business entity is called a “*collection*”. It’s called a collection because it contains a series of data-rich sections called “*artifacts*”, each designed to help capture the very essence of the business entity it chronicles.

Artifact types contained within the collection include:

- application screen shots
- extracted application field data
- legacy documents
- saved reports
- external related data source embeds and links

In addition to these artifacts, collection documents also contain sections that help users more easily consume the document, verify its integrity and establish its compliance with open document standards. The following describes each section in more detail.



Collection Header

The collection header is the introduction to the collection document. It includes the collection title page, a clickable table of contents, and a preamble which describes at a high-level the information contained within along with notes regarding how and why the collection was created.



Application Screen Shots

While data is the driving force behind every great system, it’s the user interface that transforms data into information and makes it operational. Since the user interface contextualizes data and directs the user experience, including application screen shots in an Legacy Snapshot is a must have. Further, each screen shot is OCR’d at the point of capture, so the information contained within each shot becomes part of the collection’s full text search store.



Extracted Application Field Data

Each collection type is shaped by a taxonomy that allows users to perform fast and targeted query-by-example searches (QBE). The information used to populate the taxonomy is the field data extracted from the application's screens.



Legacy Documents

Many legacy systems house documents that relate and are attached to records the legacy system tracks. In order to further contextualize a collection, these related documents are also extracted from the legacy system and embedded within the collection document thus eliminating the need to perform a separate document migration.



Saved Reports

Any saved report can be executed at the time the Legacy Snapshot is created and its results embedded in the collection document.



Links to Related Data Sources

Since Legacy Snapshots are assembled documents, you are free to link or embed any external information related to a collection entity within the collection document.



Collection Audit

Snapshot Studio meticulously documents each time a collection document is updated or reviewed as part of a workflow. This allows future consumers of the Snapshot to fully understand the creation and update process behind the collection document.



Appendix

The Appendix section contains PDF conformance verification and a digital signature ensuring both the authenticity of the final document while also guaranteeing the document can be viewed long into the future.

04 How Do I Access a Legacy Snapshot?

Any decommissioning effort that doesn't give users broad and timely access to legacy information in a form that's easy to understand is doomed to fail. By contrast, Legacy Snapshots ensure success because they exist as collections of documents based on the PDF open standard and can be easily imported into the organization's ECM infrastructure. Once in the ECM, Snapshot documents can be consumed by users via any of the following methods:

- Conversational AI
- Query-by-Example (QBE)
- Full-text search
- Line of business application deep links

Conversational AI

Conversational AI is an incredibly powerful tool for querying documents. Its ability to understand and conduct a contextual human language-based exchange with users will undoubtedly become the way people interact with corporate data. Creating an Legacy Snapshot serves as an AI on-ramp for your legacy data so it too can participate as an important part of the organization's collective wisdom. All ECM vendors are currently incorporating conversational AI into their search facilities so creating an Legacy Snapshot ensures your legacy data will be part of the conversation.

Query-by-Example (QBE)

If conversational AI is the future of search, tried and true query-by-example is clearly the present. Since Legacy Snapshots contain both raw data and well-defined taxonomies, ECM users can easily leverage familiar QBE style searching for any document in the Snapshot.

Full-Text Search

Since Legacy Snapshot documents are computer generated, by definition, they are fully-text indexed. Further, all screenshots captured in the Snapshot are pre-processed by an optical character recognition engine, so information contained within the screenshots are fully text searchable as well.

Line of Business Application Deep Links

When a user accesses a particular record and screen in a line of business application, they create a working context that can be used to establish automatic links to specific Snapshot documents. For instance, in an accounting system, when a user navigates to an invoice, details such as invoice number, vendor name, address, and SKUs can be leveraged to link collection documents in the Snapshot. This approach enables the establishment of links to Snapshots without the need to modify or train existing line of business systems. The context itself provides the linkage. As a result, this is an effective method for extending the usefulness of legacy data into ongoing operations.

05 How Did Enterprises Retire Software in the Past?

When decommissioning legacy systems, organizations need to consider how to preserve the information contained within. Factors that influence these decisions include whether the decommissioned system will be replaced by a new system or integrated into an existing system, how long the organization needs to retain the information after decommissioning, whether the disposition of the information will occur all at once or phased in over time, the frequency and urgency of user access, user proficiency with enterprise reporting and data mining tools, and the hard costs associated with maintaining the legacy system in a "mothballed" state.

Traditional decommissioning strategies include fully decommissioning the legacy system and abandoning all historic data, mothballing the system and data, migrating raw data into a SQL or equivalent database, or translating raw data into a new or existing system. Let's look at each strategy in more detail.



Day Forward or Abandon Strategy

When it comes to decommissioning a system, organizations often face a dilemma: should they track day forward activities only and abandon historical data, or employ a strategy that preserves the information for potential future use? In most cases, ongoing operational functions and compliance policies require organizations to retain the data. However, in situations where the system is related to a defunct business and thus analyzing its data provides no ongoing value or compliance exposure, abandoning the data may be the best option. So, if you're fortunate enough to be in that position, pulling the plug is easy.



Mothballing

One strategy for preserving decommissioned systems is mothballing, which involves putting the system into "cold storage" just in case it's ever needed. This strategy is useful when the organization doesn't expect to need the information frequently but doesn't feel comfortable abandoning it entirely. Mothballing can also be used as part of a hybrid plan to migrate some of the data to a new system or database and keep the old system as a backup.

However, mothballing has its downsides. First, the organization incurs costs associated with keeping the system in a state where it can be booted on demand, including hardware dedication, vendor maintenance, support or right-to-use licensing, and human resource costs for retaining experts with the know-how to work with the old system.

Second, because the system is mothballed, it doesn't receive the updates and patches required to ensure it can boot and function properly within the organization's evolving systems and security infrastructure. Unless the organization performs regular boot tests, there is no guarantee that the system will function when needed.

Migrate Raw Data To SQL or Equivalent Database

The most common strategy for decommissioning is the migration of raw data to a standalone SQL database. Like mothballing, this strategy can be part of a hybrid plan in which some of the data is transformed and imported into another system, some is migrated to a SQL database, and some data is abandoned. The benefit of this strategy is that it can be performed rather quickly as many legacy data migration vendors have developed pre-configured connectors to common legacy systems thus enabling a quick lift and shift of raw data.

However, there are several downsides to this strategy. First, when raw data is decoupled from the application's user interface, important context is lost. For instance, legacy systems often use storage-conscious codes instead of longer, more descriptive data labels. When users retrieve records from the SQL database, they often see the abbreviated codes instead of the descriptive labels and translations they are used to. So, unless the migration process takes this into account at the time of archiving and performs a reverse translation (logic that is often embedded in the user interface only), the data makes little sense to the user.

Second, retrieving data from the SQL database requires users to understand how to access the data store and be proficient in the tooling required to create and execute queries. Many users lack these skills, which means the organization must rely on a group of specialists to retrieve the necessary information. This abstraction layer between providers and requestors often results in miscommunications and delays. These delays are further compounded because requests for legacy information are often given a low priority.

Finally, creating a SQL database that makes sense requires a significant amount of time to curate the data properly. This means that data cannot simply be extracted and dumped into tables, especially if the migration is part of a hybrid plan. Human resources must take the time to transform, migrate, and dispose of data properly, which may negate some or all of the time-saving benefits associated with this strategy.





Full Translation to Another System

A less commonly used decommissioning strategy involves transferring all data from the legacy system to a new or existing system. In a perfect world, this would be the ideal way to handle a decommissioning project, but most organizations shy away from it due to the extensive upfront analysis and time-consuming conversion process. Simply put, it takes too long, costs too much and it's hard to do. Additionally, this approach can result in a loss of context as the data must be manipulated for the transfer, similar to the SQL migration method, which can make it harder for users to comprehend.

Problems and Risks with Traditional Decommissioning Methods

“Did I preserve everything we’ll need?”

“Is it easy to access and understand?”

“Am I complying with records retention policies?”

Am I putting my organization and career at risk when I pull the plug?

Clearly, traditional methods for decommissioning software are not very effective. Some methods are more difficult to perform than others, some can create compliance issues, and some make it harder for users to do their jobs. None of these methods achieve what organizations truly want, which is to preserve information in a way that's easy for users to access and understand. At the same time, they also want to avoid the high costs of keeping old systems running. This is why creating a legacy mask is the best solution for decommissioning legacy systems.

Snapshots maintain more system context (more clearly understood)

- Screenshots
- Data
- Attached documents
- Reports

Snapshots easily import into existing document and records management infrastructure

- Organizations know how to manage documents
- Records retention policies already exist for document processing, access control, future migration and disposition
- Natively AI consumable (GPT-4)



Snapshots leverage PDF open standards ensuring they will endure for decades

- PDF/A-3 compliance
- Adobe Acrobat Preflight Inspection

Snapshots are easy for all to access:

- ECM
- QBE
- Full text search
- Conversational AI
- Line of business system deep links

It's important to remember that information is the lifeblood of any enterprise - all of it. Even if a legacy system is no longer functional, secure, or architecturally sound, the information it contains is still highly valuable to the organization. That's why it's essential to find ways to preserve and use information that has been carefully collected and managed for years. Creating a legacy mask allows the organization to have a "no compromise" decommissioning strategy which securely stores and serves information for as long as it's needed. By doing so, the risks associated with software decommissioning can be eliminated, and the organization can continue to perform at its best, with the vital information flowing freely through out the immortal enterprise.

If you'd like to learn more about Legacy Snapshots and how they can contribute to a responsible legacy software decommissioning strategy, call us at (888) 703-5358, or visit us at www.sunsetpointsoftware.com.



www.sunsetpointsoftware.com
info@sunsetpointsoftware.com
888-703-5358