

### Overview

## Introduction

HP TRIM software is the Records Management component of the HP Information Governance platform, it is a scalable enterprise document and records management system that simplifies the capture, lifetime management, security and access to all your information - in business context. It enables you to more easily comply with your enterprise governance and regulatory compliance obligations, provides authoritative records of your business activities and transparent policy based lifetime management of all your information, regardless of system or source. Growing with the changing needs of Government, regulated industries and enterprises, HP TRIM helps organizations meet the goals of improved staff productivity and efficiency while reducing operational, financial and legal risk.

HP TRIM is a highly configurable and easily deployable commercial off the shelf solution that is proven in large Government and regulated industry organizations and can meet the needs of any enterprise. The product is easy to implement, supports automated policy application and it is easier to respond to e-discovery requests. HP TRIM provides records management rigor to your business records, physical and electronic, regardless of source and allows organizations to reduce the operational, financial and legal risks of legal discovery, litigation and audit.

Integrated with Microsoft Office applications, SharePoint and line of business applications, HP TRIM enables organizations to proactively capture, classify and manage evidence of their decision making and business activities in an enterprise scalable records management system. We understand that everything is a business record and must be discoverable in case of litigation or a compliance audit. Information and business records are the lifeblood of any business and therefore better records management means better business. The HP TRIM solution offers these key customer benefits:

- Proven document and records management for your enterprise faster
- Increased compliance and faster response to legal discovery requests
- Improved employee productivity and enhanced business process efficiency
- Transparent records management and site archiving for SharePoint

HP TRIM is built in accordance with the international standard for records management, ISO 15489. The product has received certification for US Department of Defense Security Standard DoD 5015.2 version 3

- Mandatory Requirements - Chapter 2 and Chapter 5
  - Management of Classified Records - Chapter 3
  - Managing Records for the Privacy Act and the Freedom of Information Act - Chapter 4
  - Non Mandatory Features - Chapter 6
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## What's New

### HP TRIM Version 7.3

HP TRIM version 7.3 - enabling Information Governance for the enterprise'

- Tight integration with HP's Information Governance solutions
    - Connector Framework Services (CFS) TRIM Connector
    - Enhanced IDOL integration
    - ControlPoint integration
    - Universal Search integration
    - Autonomy Legal Hold readiness
  - Email storage simplification
    - Introduction of the common RFC822 compliant EML format
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## HP TRIM Software

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- Content indexing and viewing of NSF files
- TRIM Mobility Client and Web Client enhancements
  - Ipad App for TRIM
  - Hit highlighting in the Web Client preview
- TRIM integration for SharePoint enhancements
  - SharePoint folder handling
  - Improved exposure feature

### Supported Languages

Product	English US	English International	French	Dutch	German	Spanish	Italian	Brazilian Portuguese	Russian
HP TRIM	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
HP TRIM Workflow	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
HP TRIM Rendering	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
HP TRIM WCM	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
HP TRIM Space Management	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
HP TRIM for SharePoint Server	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
HP TRIM SAP Integration	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
HP TRIM WebDrawer	No	Yes	Yes	Yes	No	No	No	No	No
HP TRIM VERS Rendition	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

### Connector Framework Services (CFS) TRIM Connector

The CFS TRIM Connector is the key to leveraging the power of IDOL and was developed on the standard IDOL CFS. The CFS TRIM Connector implements the following actions: Synchronize Group, Synchronize Records, Collect, Insert Records, Hold & Release Hold, View and Delete.

The TRIM Connector can be used to index TRIM with both Enterprise IDOL and OEM IDOL. TRIM stores notifications of metadata and/or content changes for the Connector.

### Enhanced IDOL integration

The enhanced IDOL integration delivers greater consistency to allow the easy migration from OEM IDOL to Enterprise IDOL. The integration is to IDOL10 and delivers; enhanced metadata indexing (in addition to content indexing), a consistent metadata schema across OEM and Enterprise IDOL, a range of indexing options and extensive re-indexing options for TRIM System administration for all methods.

### ControlPoint integration

The ControlPoint integration delivers auto-declaration and auto-classification of records into TRIM. It is based on the CFS and requires Enterprise IDOL which is bundled with ControlPoint. ControlPoint uses IDOL categories to apply policies to content in non-TRIM repositories and can use existing TRIM records for category training.

### Universal Search integration

For those organizations with the Universal Search and Enterprise IDOL products (purchased separately to TRIM), the Universal Search



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Integration makes TRIM content available with all other data sources to the enterprise. Search results are presented in the Web Client providing preview and hit highlighting for electronic records as well as displaying record metadata so further functions may be performed.

#### **Autonomy Legal Hold readiness**

Autonomy Legal Hold leverages the CFS TRIM Connector to put records on/off hold. TRIM holds can be flagged with an external ID at which point TRIM will not allow manipulation of the hold through its user interface.

#### **Email storage simplification: Standardization on EML format**

Using the EML format removes the need for native mail renditions. EML is a RFC822 compliant format that is Standards and XML based, enabling users to open email records regardless of the email client. Email will no longer be rendered to VMBX.

#### **Email storage simplification: Improved handling of Notes NSF files**

TRIM 7.3 leverages Keyview to view and text extract NSF files. These NSF files are content indexed by TRIM and viewed in the TRIM client. In order to access the NSF content through the Notes API, Keyview requires a Notes client or server install on the same machine.

#### **TRIM Mobility Client and Web Client enhancements**

TRIM 7.3 offers a customer App for iOS aimed at the iPad user, based on a new TRIM Service API. The mobility client allows basic searching for records and the ability to download them for off-line reading. The mobility client provides access to saved searches and TRIM trays. Hit highlighting is provided in the Web Client preview.

#### **TRIM integration for SharePoint enhancements: Folder handling and exposure features**

Enhancements to the SharePoint integration at the folder level and through object exposure have improved the transfer of information context. Folders in libraries can be created as separate Containers in TRIM and the level at which folders will be flattened out can be determined. TRIM folder records are related and flattened structure can be "rehydrated in SharePoint. The introduction of a "search filter" for folder exposure allows only selected items in a container to be exposed. The introduction of Rendition exposure allows for the selection of a particular file type or rendition of a document to be exposed. For example pdf documents may be exposed instead of Microsoft office documents. Event driven exposure allows items to be added to an exposed folder to generate an event.

### Features & Benefits

#### Key differentiators at a glance

HP TRIM, built from the ground up with records management principles, manages all information, physical and electronic, for every stage of its life cycle. HP TRIM simplifies the capture, management, security and access to your information - in business context. It enables you to meet governance and regulatory compliance obligations, provides authoritative records of your business activities and enables the management of your information, regardless of system or source, across the lifecycle through one set of policies. Appropriate for medium and large organizations in Government, regulated industries and corporations, HP TRIM helps enterprises meet the goals of improved business process and staff productivity while reducing operational, financial and legal cost and risk.

Our customers have been at the forefront of the evolution of the international records management standard ISO 15489 and other standards of best practice in corporate governance, legislation compliance and records management. As a result we bring a deep understanding of the issues of managing evidence of business activity and decisions with records management.

#### HP TRIM software

1. Proven enterprise document and records management
    - a. Manage all physical & electronic content, regardless of type or source for life
    - b. Secure your business records from inappropriate access and misuse
    - c. Simplify access to information improving staff productivity and process efficiency
    - d. Deliver the best value for money and lowest implementation risk. HP TRIM, it just works!
  2. Meet compliance obligations and be e-discovery prepared
    - a. Simplify compliance with regulatory obligations with an enterprise governance platform
    - b. Apply retention and disposition control over all records regardless of location, automatically
    - c. Reduce financial risk and cost of e-discovery with policy based control of your records
    - d. Protect your business and reduce costs with one secure authoritative system of record
  3. Enhance business process management
    - a. Streamline document and record centric business processes for improved business efficiency
    - b. Minimize costly errors and decisions with one authoritative source of your business records
    - c. Enhance operational efficiency through more informed and timely decisions
    - d. Secure all content in one authoritative system enhancing transparency and governance
  4. Apply records management rigor to all SharePoint content transparently
    - a. Manage all SharePoint content for life for enhanced compliance seamlessly
    - b. Free the user from records management tasks with administrative control over business rules
    - c. Provide rigorous security over all enterprise records with integrated authentication
    - d. Manage all SharePoint content and all enterprise documents and records in one system
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# QuickSpecs

## HP TRIM Software

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### Features & Benefits

#### Scalability

HP TRIM is highly scalable with some of the largest records management implementations in the world. For example a large US Defense organization has 360,000 users across 52 bases. A major international oil company has 136,000 users across the globe. These organizations use HP TRIM software to capture, manage, access and secure their electronic and paper records from creation to disposal.

#### Large Installation of Users and Delivery Servers:

The HP TRIM installation at Northern Ireland Civil Service (NICS) has 123 concurrent interoperating servers on a single dataset. The number of servers is determined by network topology rather than number of users or documents. The deployment has over 15,000 active users across 11 departments in 250 locations and 9 million documents in the system.

#### Large Number of Users:

A Defense agency Intranet has 360,000 named users. To date HP TRIM has been deployed to 324,000 desktops, 37 senior echelons with over 30,000 active users across 17 application servers and 10 database servers.

#### Large Number of Documents:

A secure government account has over 1.5 million case files held in the HP TRIM database. That is approximately 17 million pages and roughly 3TB of data, as those cases range from 10 to 2500 pages. The account is leveraging HP TRIM's document and records management capabilities from automated import of cases to retention schedules managing cases lasting 40 years. The complexity of the account is made manageable by using HP TRIM.

#### Large Records Management Dataset:

A Federal Government social security department has a large dataset comprising 19 million case files (consisting of approximately 75+ million physical records) which are held in paper files. They are stored in 5 large warehouses around Australia. They have a single HP TRIM database accessible by the distributed offices to manage all 19 million case files. The files managed in HP TRIM are the entire client and administrative collection, the bulk of which are active client cases.

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### Software Description

#### HP TRIM software

HP TRIM software is document and records management system software. With tight desktop integration and the ability to scale across large, distributed environments, HP TRIM lets you capture, manage, access and make more secure your enterprise information, from electronic to physical records and from creation to ultimate disposal.

HP TRIM is a complete highly configurable document and records management solution built on a single code base to the international standards of records management. HP TRIM is licensed as a base system with additional optional modules. The base package license includes HP TRIM functionality delivered through either a rich client, web client or with the HP TRIM for SharePoint module users can access HP TRIM functionality from SharePoint.

#### Record Management:

- Record Types
- Business classification
- Thesaurus
- Retention Schedules and Holds



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- Retention Review
- XML Export
- Label printing and barcode processing for paper records
- Metadata and Record Statistics Reports
- Security Levels and Caveats

#### Document Management:

- Check-in/Check-out
- Version and Revision Control
- Actions and Procedures
- Action Statistics Reports
- Boolean Search Engine, including metadata and content, proximity searching and fuzzy searching
- HP TRIM Image low end scanning application

#### HP TRIM additional modules included in the base package are:

- HP TRIM Web Client - This the zero footprint browser interface designed for ease of use. It is developed with a focus on usability for the end user and is designed to be consistent with the look and feel of the HP TRIM rich client and is customizable to suit your intranet. It complies with US 508 Accessibility Guidelines and is verified to US DoD 5015.2 V3.
- Content Indexing - Creates indexes of any textual content in records stored in HP TRIM. It provides full text searching for content that can be combined with metadata searching using Boolean operators.
- Indexing & Search - IDOL Universal Search provides users with a simple, personalized search and unifies content across multiple internal and external content sources to provide a universal search environment for all enterprises. It provides the best possible chance of finding the right piece of information; presents easy-to-navigate results in an intuitive Web interface; personalizes search results and spotlights high-value content; and offers post-search tools to further refine results the user experience tailored specifically to their unique requirements.
- WebDrawer - Provides Web Access to data and documents in HP TRIM through an ISAPI extension for IIS or the HP TRIM WebDrawer server. It is used for read only access to HP TRIM from the internet. See Note2.
- Document Caching - Allows electronic documents to be cached on workgroup servers to overcome bandwidth and network limitations. Caches can be configured in size and by document types.
- Transmittal/Communications - Compiles a mail registry in HP TRIM of all mail and communications with details of; Addressee, Sender, Carrier, Carrier reference number, date and direction of communication.
- Annotate/Redaction - Allows TIFF images to be annotated and sensitive information to be blanked out (redacted).
- Guest Gateway - Allows the configuration of a Guest User account that can be used for unlimited anonymous access to HP TRIM. All users connecting through the Guest User account will use its login profile for security and access restrictions; and any actions performed will be logged against its single identity.
- Kofax Xtension - The Kofax Release Script allows images to be captured into HP TRIM directly from the Kofax Ascent Capture high-end scanning software. New records can be created or images can be attached to existing records in HP TRIM. Record metadata can be entered during the Ascent Capture Validation or Verification stages or it can be captured automatically from form zones using OCR/ICR.
- Labellink Xtension - Provides integration between HP TRIM and ColorBar Gold which allows printing of special color coded file labels.
- Directory Synchronization - Provides an import and maintenance tool to map HP TRIM users from

### Features & Benefits

any LDAP compliant directory e.g. Active Directory or Novell e-directory and links LDAP data fields to HP TRIM data fields.

#### The HP TRIM Optional modules include:

- HP TRIM Workflow module
- HP TRIM Rendering module
- HP TRIM Web Content Management module
- HP TRIM Space Management
- HP TRIM modules for SharePoint Integration
- HP TRIM module SAP Integration
- HP TRIM VERS Rendition

#### **HP TRIM Workflow module**

The HP TRIM Workflow module is a comprehensive workflow engine that is embedded in the HP TRIM software records management system. HP TRIM Workflow lets you relate workflows to documents and records, so that the right people have immediate access to the documents they need when they need them. The workflow module includes, a graphical workflow editor, template based workflow creation, sequential and parallel routing, decision branching, escalation, activity suspension, authorization of complex processes.

#### **HP TRIM Rendering module**

The HP TRIM Rendering module provides a fully automated process for storing both an original document and its renditions to a record. If you plan to maintain electronic records for a long period of time, you need to keep those records usable even if their original format becomes obsolete. HP TRIM Rendering can create long-term portable document format (PDF) and PDF/A renditions of your printable content as a server-side process and store them with their original records using HP TRIM support for multiple renditions. PDF/A is the preferred long term archival format for electronic documents as defined by ISO 19005-1:2005 - Document Management.

#### **HP TRIM Web Content Management module**

HP TRIM Web Content Management is an integral part of HP TRIM software and manages the content and structure of websites, including the creation, editing, approval and publication processes, the framework and navigation, distributed authoring, archiving and retrieval. Through tight integration with HP TRIM, HP TRIM Web Content Management lets you quickly and consistently manage your Internet, intranet and extranet sites using a web browser. This provides a single point of access to information for authorized users, including customers, partners and employees, to deliver content that is highly dynamic, relevant and more secure without the need for specialized web publishing skills.

#### **HP TRIM Space Management module**

HP TRIM Space Management lets you manage paper and other physical records in a long-term storage facility to meet your specific business needs. With HP TRIM Space Management, you can set up and manage your storage facility as a graphical hierarchy of arranged storage space. You can define a storage hierarchy model that represents your physical storage space and you can then set up different physical storage bay and shelving layouts in your model and design your space according to your organizations' needs.

### Features & Benefits

#### **HP TRIM for SharePoint modules**

HP TRIM can manage, finalize, relocate and archive all SharePoint content including blogs, wikis, discussions, documents, and sites, according to established business rules set at an administrative level.

The Records Management module manages the life cycle of all SharePoint content according to these business rules and does this in a way that is completely transparent for the user. All managed content is and easily discoverable from SharePoint and HP TRIM with full audit trails maintained in HP TRIM for all managed content. With transparent records management for SharePoint content and the ability to search across SharePoint, federated data stores and HP TRIM from SharePoint staff productivity is greatly enhanced.

The HP TRIM for SharePoint Archive module enables administrators to set lifetime management policies on content in SharePoint for automatic archival of entire sites as well as the content items. This capability is delivered with complete transparency to the user. The user can then search and discover archived content from SharePoint (dependent upon security permissions) and the site or content item can be restored to its original form.

#### **HP TRIM module for SAP Integration**

The HP TRIM module for SAP integration for ArchiveLink automatically captures and organizes SAP ArchiveLink documents and SAP metadata across the enterprise for review by both SAP and non-SAP users. This allows you to store all important corporate documents in context and in containers of related information into a single system for a centralized view of the information. As a result, you can apply enterprise compliance policies across critical financial information and allow non-SAP users to review information created in SAP without the need to use or learn the SAP system. In addition SAP has certified HP TRIM software 7.0 for integration with SAP NetWeaver 7.00 via the SAP integration scenario SAP ArchiveLink.

#### **HP TRIM VERS Rendition module**

VERS is a framework of standards which specifies a standard format for electronic records. It ensures that all records are stored in a documented format, to enable viewing of records in the future, regardless of the system that created them. HP TRIM software is compliant with all specifications of the VERS standard and as such renders documents in VERS format.



### Licenses and Media

#### HP TRIM License model

HP TRIM is licensed as a base system with additional optional modules. The system is licensed on a named user basis. Optional modules are also purchased on a named user basis (and the number of users for each of the optional modules will be equal to the number of users of the base product).

This named user pricing model provides economies of scale with discounts increasing as the number of users increase. Additional modules can be purchased at any stage which allows customers to rollout all components of HP TRIM in stages and as required. To encourage customers to deploy servers to maximize performance across their network, by deploying data and content caches where needed, there is no server charge.

The HP TRIM enterprise SKU is for 100,000 users for multiple datasets and includes all optional legacy modules excluding the HP TRIM SAP Integration. The HP TRIM enterprise SKU has a single support option of 24/7.

Information about additional license authorizations can be found at:  
[http://welcome.hp.com/country/us/en/prodserv/software\\_licensing.html](http://welcome.hp.com/country/us/en/prodserv/software_licensing.html).

#### Documentation

HP TRIM software manuals are available with the installation software in PDF format. Documentation can also be downloaded from: <http://support.openview.hp.com/selfsolve/manuals> and by navigating to HP TRIM and downloading the manuals in PDF format. From this site you can join a discussion forum and also register to receive e-mail notifications for software patches and changes in the status of your product enhancement requests.

Extensive Help is provided from the Help menu or the Help icon in the HP TRIM client interface.

#### HP TRIM Compatibility Matrix

HP TRIM is n-tier client/server application. The product operates at the middle tier and is designed for Microsoft Windows 64 bit and 32 bit platforms. The client tier can be any IBM compatible PC running Microsoft Windows, the HP TRIM Web client, or with the HP TRIM for SharePoint module, SharePoint. The Windows environment supported is dependent upon the release of HP TRIM. The database tier can be on any hardware platform or operating systems running Microsoft SQL Server or Oracle. The database supported is dependent upon the release of HP TRIM.

The compatibility support matrix for HP TRIM can be found at:  
[http://support.openview.hp.com/sc/support\\_matrices.jsp](http://support.openview.hp.com/sc/support_matrices.jsp)

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## HP TRIM Software

### Services and Support, Care Pack Information and Warranty

#### Software Warranty

HP warrants only that the software media will be free of physical defects for a period of ninety (90) days from delivery. For more information about HP Global Limited Warranty and Technical Support, visit: <http://h40059.www4.hp.com/warranty/support/tc.php>

#### Software Support Offerings

HP's Software Services portfolio provides a comprehensive suite of personalized, proactive services, dedicated electronic services and business advocacy, creating a valuable long-term partnership between you and your HP team.

##### HP Software Support

- 24x7 web-based intelligent response
- Software discovery and license history
- Software patches, updates and upgrades
- Phone-in 9x5

##### HP Software Support 24x7

HP Foundation Care 24x7 connects you to HP 24 hours a day, seven days a week for assistance on resolving issues - hardware onsite response within four hours and software call back within two hours after opening your case. Three years' coverage recommended with HP Care Pack Service.

##### HP Software Premier Support

In addition to Software Support or Software Support 24x7, Premier offers proactive and personalized services, with the highest call priority. An HP Software specialist team:

- Owns, manages and reports on your service cases through resolution
- Manages a profile of your software environment, including configuration maintenance
- Delivers additional services you choose
- Delivers optional business focused partnership and advocacy

##### HP Software Support Engineering Days

Support Engineering Days provides even greater flexibility in the form of software technical assistance delivered either remotely or on-site by highly qualified and experienced support personnel. Experts work side-by-side with customers to review, validate and align customers' technical environments, employing best-in-class service

### Professional Services

#### HP Professional Services for Content Management

We help your organization enhance business process efficiency and innovation by improving your ability to access and control your unstructured data assets. Our consulting and solution design and implementation services improve how you capture, manage, retain and deliver content to the right place at the right time via the right method - reducing costs and increasing productivity.

Our services deliver:

- Document Automation - Improve customer satisfaction and productivity by automating manual and paper-based processes
- Records Management - Reduce risk and increase productivity with services that enable you to analyze, create, design, deploy and maintain your records management solutions
- Document Management - Access documents faster and easier through services that allow you to analyze, design, deploy and maintain documents across the enterprise

**HP Software Professional** We enable your organization to save time, reduce costs and lower risks by



### Services and Support, Care Pack Information and Warranty

**Services for Information Management Strategy and Planning** using information more effectively. Using our knowledge of industry standards, as well as HP best practices and those of cross-industry groups such as AIIM, we help you define an information management strategy that aligns your business and technology goals.

Our services include:

- HP Content Management Master Plan - looks at your business requirements for content and maps them to a plan for an iterative, cost-effective program to capture, manage, retain, secure and deliver all types of content to the right place at the right time via the right technology, including computers, printers, handheld devices and application output.
  - E-Discovery and Records Management Advisory Services - Meet compliance requirements while managing risk by automating the storing and indexing of information. Our services help you archive search and retrieve just the information needed to satisfy e-discovery, corporate governance, legal and compliance demands - enabling your workforce to remain focused on running the business.
- Information Governance Consulting - Develop detailed plans for document management and content management environments that align your IT and business requirements.

### Education & Training

HP Software Education Services provides a comprehensive curriculum for all HP software products with experienced instructors with real-world experience who can provide you with invaluable tips and tricks. We offer flexible learning options including instructor-led training in our classrooms, or onsite at your facility, end user training, as well as customized training courses and professional certification programs.

We know HP software and HP TRIM inside and out, which enables us to deliver the best training experience possible for you and your staff! Maximize the value of HP TRIM by enabling your staff with the training they need to deliver the return on investment to your business.

To learn more about our extensive HP Software training offerings, including course detail, please visit us at: visit: [www.hp.com/software/education](http://www.hp.com/software/education), select your country and navigate to HP TRIM.

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