

## Features and Benefits

### Introduction

HP TRIM software is a proven records management system that provides a scalable, policy driven foundation to your information governance strategy driving business efficiency and records integrity - fast. Automated rules, classification and workflow capabilities enable the easy capture, secure management and discovery of your business information regardless of source including all SharePoint content, improving process efficiency and staff productivity.

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 business. 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 meet governance and regulatory compliance obligations, and 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 records management for your enterprise faster
- Increased compliance and faster response to legal discovery requests
- Improved employee productivity and business process efficiencies
- 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 complies with US Department of Defense Security Standard DoD 5015.2 Chapters 2, 3, 4 and complies with and supports other major standards.

### What's New

#### *HP TRIM Version 7*

- New HP TRIM for SharePoint Records Management and Archive modules
- New TRIM Web client
- Unicode support
- New language localization for Spanish and Italian
- 64-Bit architecture
- Search Engine enhancements
- Improved memory management, network performance, record type scalability, content index searching, event processing, and diagnostics
- Enhanced SDK.Net, SDKUI.Net integration tools

#### *HP TRIM Version 7 module for SharePoint*

HP TRIM for SharePoint is a next generation SharePoint integration that provides records management rigor to all SharePoint content including web 2.0 and seamlessly manages it according to business rules established at an administrative level. This enables the compliance and governance requirements you have for your enterprise content to be applied to SharePoint content. HP TRIM can manage, finalize, relocate and archive SharePoint content including blogs, wikis, discussions, documents, and sites, according to established business rules. This process is transparent to the user and all managed content is easily discoverable from SharePoint and HP TRIM. Organizations can confidently build new business applications on the SharePoint platform and seamlessly manage the content from these applications in HP TRIM according to their records management policies.

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HP TRIM for SharePoint modules

### Records Management

1. Apply records management rigor to SharePoint
  - a. You define the rules and all records are managed for life, and its transparent for the user
  - b. Centrally defined and managed security permissions protect records from misuse.
  - c. SharePoint federated search returns SharePoint and HP TRIM records enhancing productivity.
  - d. Managing SharePoint content including web 2.0 content enhances compliance.

### Archive module

1. Seamless SharePoint site archiving
  - a. Lifetime management policies automate archival and move entire SharePoint sites to HP TRIM.
  - b. Usability of the content is retained with sites are able to be restored into SharePoint.
  - c. Lifetime policies are applied transparently.
  - d. An integrated authentication model provides rigorous security over your business records.

### HP TRIM Web client

HP TRIM Web Client is a zero footprint browser interface designed for ease of use for the knowledge worker. Developed with a focus on usability for the end user, the HP TRIM Web Client 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.

#### Features & Benefits

A features and functionality summary of each of the components of HP TRIM software can be found on the HP Sales and partner portal for HP TRIM.. The document is a sales training document and provides one place for the features and functions of HP TRIM.

HP TRIM software helps organizations improve business efficiency and staff productivity as well as reduce the heavy burden of information accountability through best practice information management. HP TRIM incorporates more than two decades of information management expertise into comprehensive, "out-of-the-box" software, providing document and records management, e-mail management, web content management, meeting management, imaging, workflow and document-centric collaboration to organizations around the world.

With tight desktop integration and the ability to scale across large, distributed environments, HP TRIM lets you capture, classify, manage, access and make more secure your enterprise information, from electronic to physical records, including all SharePoint content.

#### A summary of key benefits

- HP TRIM ensures all unstructured information, regardless of source, is managed in a unified way throughout its life cycle and is available to the business where and when it is required.
- Email and SharePoint content are captured in their business context and are easily discoverable and managed for the life time of the business record ensuring that the risk of critical corporate records being unmanaged and lost is avoided.
- HP TRIM for SharePoint, a next generation records management solution is unique in the way it manages SharePoint content. Any content item, list or site is managed according to established business rules. Because it does this in a completely transparent way, the business will capture all business records it wants to and the end user can spend more time on their daily core work, eliminating the time and effort performing records management tasks.
- Information security is enhanced with strict control of access to all managed records, regardless of

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type or source, ensuring only those who are authorized to access records can do so thereby protecting corporate information from inappropriate access and misuse.

- Being prepared for e-discovery is easy. All unstructured information including all SharePoint content is proactively captured, classified and managed in accordance with legislative requirements greatly reducing the cost of e-discovery.
- Managing all unstructured information in a unified way delivers enhanced operational efficiency through more informed and timely decisions, greater productivity of staff, and improved service to the customer.

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## 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 enables compliance with legislative and regulatory requirements while increasing security, data integrity, productivity and accountability.

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.

1. Proven enterprise records management
  - a. Manages all physical & electronic content, regardless of source from creation to disposal.
  - b. Secures your business records for improved business management and information discovery.
  - c. Provides easy access to information improving staff productivity and process efficiency.
  - d. Simply the best value for money and lowest implementation risk. HP TRIM, it just works!
2. Meet compliance obligations and be e-discovery prepared
  - a. Records management fundamentals support the ability to meet regulatory obligations.
  - b. The cost of responding to litigation by being e-discovery prepared is significantly reduced.
  - c. Automatic application of retention policies reduces financial risk and cost of e-discovery.
  - d. One secure authoritative system for all content protects your business and reduces costs.
3. Enhance business process management
  - a. Streamlined document and record centric business processes supports better business efficiency.
  - b. One authoritative source for corporate records minimizes costly errors and decisions.
  - c. Enhanced operational efficiency is achieved through more informed and timely decisions.
  - d. Securing all content in one authoritative system enhances transparency and governance.

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### 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 365,000 users across 52 bases. A major international oil company has 127,000 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.

#### 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
- Retention Review

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- 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.
- 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.
- 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.
- Document Assembly - This is an add- in to Microsoft Word which connects to HP TRIM to retrieve document templates, standard paragraphs and metadata to compile standard documents, letters, forms, contracts. Once the documents are assembled they are automatically saved in HP TRIM.
- 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 any LDAP compliant directory e.g. Active Directory or Novell e-directory and links LDAP data fields to HP TRIM data fields.

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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 Meeting Manager module
- HP TRIM module 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) renditions of your printable content as a server-side process and store them with their original records using HP TRIM support for multiple renditions.

### 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.

### HP TRIM Meeting Manager module

HP TRIM Meeting Manager manages the entire information flow for meeting processes. Whether your meeting is weekly, monthly or ad hoc, HP TRIM Meeting Manager automates the process of setting up and scheduling meetings by using pre-defined scheduling templates. This makes tracking information for formal meetings easier. Before a meeting you can submit agenda items for the meeting. HP TRIM Meeting Manager will compile agenda items and get approval in advance. During and after the meeting, it provides minute taking, including tracking of outcomes and actions.

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### 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 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.

### 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.

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, Oracle or IBM DB2. 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)

## 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** In addition to Software Support, the Software Support 24x7 level offers 24x7 phone-in assistance

#### 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 Services for Information

We enable your organization to save time, reduce costs and lower risks by using information more effectively. Using our knowledge of industry

## Services and Support , Care Pack Information and Warranty

**Management Strategy and Planning** 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.

### Configuration

HP TRIM is licensed as a base system with additional optional modules. The system is licensed 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). HP TRIM software pricing is structured in named user bundles which are 1, 5, 10, 50, and 100 named users. The larger the number of users the larger the volume discount that is provided.

This named user pricing model provides economies of scale. Additional modules can be purchased at any stage which allows customers to rollout all components of HP TRIM in stages. 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.

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To learn more, visit [www.hp.com/go/im](http://www.hp.com/go/im)

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