Information governance for SharePoint content

HP TRIM for SharePoint
Many organizations use Microsoft® SharePoint as their primary collaboration tool. Business documents related to specific projects, business groups, or activities are generated via an ever-increasing number of SharePoint sites specifically created for the task at hand. But what happens to these SharePoint sites and the business records they contain once a project or activity concludes? For many organizations, nothing happens. The SharePoint site is abandoned, and the content within it is left unmanaged—sitting outside the organization’s information governance plan and records management policies.

**Gain control of all content**

Organizations are under pressure to meet both information governance and regulatory compliance obligations for SharePoint content and enable workers to use it efficiently. SharePoint’s success in facilitating collaboration across the enterprise has inadvertently added to this burden as organizations struggle to gain control over content.

HP TRIM for SharePoint seamlessly manages all SharePoint content. A scalable enterprise document and records management system, it helps you to easily capture, manage, access, and protect all your business information. HP TRIM applies proven records management for SharePoint across your entire organization.

**Rely on a platform approach to managing SharePoint records**

HP Autonomy offers an extensive portfolio of software solutions that underpin our information governance framework, and records management is a cornerstone of this offering. The information governance framework provides a platform approach for managing all information across the enterprise (including SharePoint content) in accordance with corporate policy and business goals.

**Figure 1:** HP Autonomy Information Governance Framework
The application of records management policies and processes to the lifecycle of all content is essential for achieving comprehensive information governance and regulatory compliance.

The HP TRIM for SharePoint Records Management module enables you to add enterprise records management rigor to your Microsoft SharePoint 2010 environment, including support for Microsoft SharePoint Online Dedicated Plan/Service offered by Microsoft Office 365.

The HP TRIM for SharePoint Archive module enables administrators to apply lifetime management policies to content for automatic archival of entire sites. Managed content is delivered through SharePoint in exactly the same manner providing transparent records management for information workers.

**Use best-practices records management for SharePoint**

Meeting internal governance and regulatory compliance requirements and responding to legal discovery, external investigation, or audit, is both a business obligation and a challenge. HP TRIM is an enterprise scalable records management system designed to the international standards of records management, ISO 15489:2001. HP TRIM can help you meet demanding regulatory requirements for your SharePoint content and all other unstructured content. Certified against U.S. Department of Defense (DoD) 5015.2 v3 Chapter 2 (mandatory requirements), Chapter 3 (classified records), and Chapter 4 (Privacy and Freedom of Information acts), and the Victorian Electronic Records Strategy (VERS), HP TRIM supports major regulatory standards, globally. It is proven in organizations spanning government and regulated industry, and is ideal for global organizations that need to meet regulatory compliance obligations, reduce risks, and improve overall productivity.

**Improve user adoption with transparent records management**

The HP TRIM for SharePoint Records Management module manages all SharePoint content and classifies it according to defined business rules. These rules are based on the compliance and governance requirements you have for all enterprise content and can be applied to SharePoint content seamlessly, in a way that does not impact users.

- You define the rules, and all business records are managed for life, supporting your compliance goals
- Content is centrally defined and managed, with security permissions and access controls that protect corporate records from inappropriate access and misuse
- You can search across SharePoint, federated data stores, and HP TRIM for SharePoint—enhancing productivity
- No matter how complex the business rules, the user’s SharePoint experience does not change

*Figure 2: HP TRIM for SharePoint Integration diagram*
Ensure the safe-keeping of enterprise content with seamless site archiving
The HP TRIM for SharePoint Archiving module can automatically archive entire SharePoint sites into HP TRIM according to business rules and lifetime management policies. The usability of the content is retained as sites can be rehydrated back into SharePoint.

- Administrators set lifetime management policies on content in SharePoint for automatic archival of entire sites.
- Entire sites are automatically archived and removed from SharePoint when the configured policy rules are met.
- Policies are applied transparently, with less impact on users.

Reduce litigation costs by being prepared for eDiscovery
To best prepare for eDiscovery or investigation, organizations must adopt a proactive approach to the management of all information, including SharePoint content. This viewpoint is supported by the Electronic Discovery Reference Model (EDRM), which places information management as the first stage of the eDiscovery process. The EDRM website describes the Information Management stage as “Getting your electronic house in order to mitigate risk and expenses should eDiscovery become an issue, from initial creation of electronically stored information through to its final disposition.”

HP TRIM allows you to proactively capture and manage all business records, and apply corporate classification, retention, and disposal authorities. It helps ensure the authenticity, integrity, and reliability of corporate records. For content managed within HP TRIM, you can search and discover information in response to legal discovery and investigation. Where applicable, you can apply legal hold to content to keep it safe until release.

HP TRIM for SharePoint applies this same level of compliance rigor and eDiscovery readiness to your SharePoint content, reducing your exposure to financial, legal, and operational risks associated with the eDiscovery process.
Rely on lifetime management and security of SharePoint content

Much of the content created in SharePoint sits outside an organization’s information governance plan and remains unmanaged. Once a site is closed and no longer actively used by staff, it will most likely remain in an ungoverned state. Very rarely will staff retrospectively assess content to determine its status as a record or not; they tend to move on to the next project or activity. Unless someone actively declares the content as a record or applies lifetime policies to the site while it is active, the content can remain unmanaged for life, exposing the organization to significant business risk.

Simplify the application of lifetime policies to SharePoint content

HP TRIM for SharePoint applies lifetime policies to all managed content by mapping data between HP TRIM and SharePoint, binding the two systems together. HP TRIM assumes authority over all managed SharePoint content.

The management of SharePoint content can be done in two ways: transparently (without the user knowing) or actively (where the user makes a decision to declare content as a record). For content managed at a site or list level, the user can create, edit, and version this content with the SharePoint interface and all iterative changes will be captured and managed automatically. Policies are administered by HP TRIM and applied to SharePoint content either:

• At the site level (for all content),
• At the list level (for content contained within specified lists)
• On an item-by-item basis (for specified content)
Lifetime policies are applied transparently with content and sites relocated, archived, and deleted according to the established retention and disposal authorities. SharePoint content can also be left unmanaged, if desired. Full audit logs are maintained for all activities performed.

“HP TRIM for SharePoint” applies records management concepts via four key processes, outlined in Table 1.

**Table 1: Applied to SharePoint content managed by HP TRIM.**

| Manage | • SharePoint content is accessible and editable through SharePoint.  
| Finalize | • An authoritative record is created in HP TRIM, which governs the permitted updates to the content.  
| Relocate | • SharePoint content is accessible through SharePoint for viewing only.  
| Archive | • SharePoint content can no longer be edited.  
| | • Further changes to metadata or the object itself are prevented.  
| Relocate | • SharePoint content is finalized and relocated to HP TRIM.  
| Archive | • Content is no longer accessible in SharePoint.  
| | • Ideal for operationally inactive content.  
| Archive | • SharePoint content is finalized and relocated to HP TRIM.  
| | • Content is removed from the operational environment.  
| | • Further changes to metadata or SharePoint content are prevented.  

**Apply security to SharePoint content**

HP TRIM applies rigorous security to all managed content. The HP TRIM for SharePoint integration extends this security capability through an integrated authentication model to managed SharePoint content. HP TRIM meets the rigorous records management and security certification requirements of the U.S. DoD 5015.2 v3 Chapter 3 for classified records. With HP TRIM you can satisfy both corporate and user security requirements through a single security model controlled by HP TRIM.
Go beyond collaboration: Improve efficiency and knowledge via intelligent search

The ability to collaborate on content does not always translate into improved business efficiency or discovery. Simple content searches can deliver large volumes of documents that aren’t relevant, leading to time that was wasted manually reviewing and refining search results. Generating and managing content in multiple SharePoint sites may lead one to question, “How do I best find all relevant information?”

Locate exactly what you need with federated searching
HP TRIM can simplify access to information with powerful search tools and extensive metadata management, enabling swift retrieval of related information within the context of your business processes. Content managed by HP TRIM can come under the corporate classification or file plan simplifying navigation and the application of retention and disposition schedules. HP TRIM for SharePoint integrates SharePoint federated search, letting you search all of your enterprise content and all repositories from one place. Security and access controls managed by HP TRIM see that content is returned to only those users authorized to access it.

Key advantages
HP Autonomy delivers an integrated, proven set of solutions for records management and information governance. The platform relies on three key components:

HP Autonomy’s unique meaning based software
Autonomy’s Intelligent Data Operating Layer, IDOL, forms a platform that understands and processes all unstructured, human information across the enterprise regardless of data type or source. When combined with Autonomy ControlPoint and HP TRIM, IDOL enables a world-class information governance framework to help you understand, control, and secure your information, and derive valuable business insight.

Market-leading hardware and cloud storage
HP provides servers, networking, and storage designed from the ground up to optimize the processing of human information.

World-class services
HP’s comprehensive global initiative delivers world-class experts and specific solution sets designed to help organizations derive value from human information.
About HP Autonomy

HP Autonomy is a global leader in software that processes human information, or unstructured data, including social media, email, video, audio, text and web pages, etc. Autonomy’s powerful management and analytic tools for structured information together with its ability to extract meaning in real time from all forms of information, regardless of format, is a powerful tool for companies seeking to get the most out of their data. Autonomy’s product portfolio helps power companies through enterprise search analytics, business process management and OEM operations. Autonomy also offers information governance solutions in areas such as eDiscovery, content management and compliance, as well as marketing solutions that help companies grow revenue, such as web content management, online marketing optimization and rich media management.

Please visit autonomy.com to find out more.