Overview

HP TRIM software 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 comply with your enterprise governance and fulfill regulatory compliance obligations. It provides authoritative records of your business activities and transparent policy-based management of all your information, regardless of system or source for life. It also helps you to:

- Achieve new in-place records control over archived items in external repositories
- Manage SharePoint records in the Microsoft® cloud with HP TRIM support for SharePoint Online
- Automate and control retention across countries with multi-jurisdictional retention management

What’s new in HP TRIM version 7.2

Extending beyond the powerful enterprise records management capabilities of HP TRIM, the software can now provide records authority control over business records in external archives. With support for SharePoint Online dedicated plan/service offered by Microsoft Office 365, HP TRIM can extend centralized policy control over SharePoint content in the Microsoft private cloud. Also, organizations managing information across multiple countries and jurisdictions can automate and centrally control disposition processes, which reduce administrative overhead.

These new capabilities are complemented by new performance and scalability enhancements, which further enhance the strength of HP TRIM as an enterprise document and records management solution for any organization.

Additional capabilities

- Control business records in place with HP TRIM Records Authority
- Apply records management rigor to SharePoint content in the cloud
- Automate disposition of records across countries with multi-jurisdictional retention
- Simplify HP TRIM for SharePoint administration with synchronized classification and term sets
- Reduce storage costs with rules-based document allocation to storage pools
- Leverage IDOL Universal Search for a simple, personalized search and a faster, more thorough exploration of results
- Enhance administration with TRIM, document, workflow, audit event reports
- Deploy HP TRIM in the Russian language
HP TRIM Records Authority
Control the disposition of business records in external document repositories according to corporate policies with HP TRIM Records Authority. The HP TRIM SDK.NET can be used to develop integration to file systems and external archive repositories such that the HP TRIM Records Authority provides disposition control in place.

HP TRIM can be configured as the document archive repository with records from external systems collected into an HP TRIM archive and controlled by the Records Authority. With HP TRIM Records Authority, you will know what you can dispose of and retain what is needed thereby reducing the costs and risks associated with legal discovery and audit.

Support for Microsoft SharePoint Online
Transparencyly capture, manage, and secure your SharePoint content in the Microsoft Cloud records with HP TRIM support for Microsoft SharePoint Online dedicated plan/service offered by Microsoft Office 365. With the addition of support for Microsoft online environments, you get rigorous records management of your SharePoint content in the Microsoft cloud, managed in context with all your other enterprise business records.

Multi-jurisdiction retention management
Apply retention rules across multiple countries with multi-jurisdiction retention management. Once correct retention rules are applied to all records, the process of determining what records can be destroyed can be automated and run as a centrally controlled process, which significantly reduces administrative overhead. Without multi-jurisdiction retention management, records management administrators have to review retention and disposition rules in each country or jurisdiction prior to deletion.

Enhanced HP TRIM for SharePoint Administration
Synchronize HP TRIM classification with SharePoint term sets, extend the capability of the SharePoint Content Organizer to apply rules to determine when content is to be managed in HP TRIM and manage SharePoint content types centrally and propagate to multiple SharePoint site collections. This simplifies the administrative tasks when setting up the HP TRIM for SharePoint integration.

Reduce storage costs
Enhance document storage management with the HP TRIM ability to allocate documents to a storage pool with the location of documents determined by rules. Document stores can be configured to compress all electronic documents added to a store and transfer documents to the document store synchronously or asynchronously. This reduces the overhead of managing document stores and reduces storage costs.

Indexing & Search
Powered by IDOL Universal Search you get better search results, faster across all the systems where content resides. IDOL Universal Search provides users with a simple, personalized search experience tailored specifically to their unique requirements. With Universal Search, a single query quickly federates unified results across systems in an intuitive, easy-to-navigate Web interface. Users get the big picture quickly through advanced visualization and dynamic categorization for a faster, more thorough exploration of results.

Enhanced statistical reports
Generate statistical aggregation reports for TRIM events, document events, workflow events, and audit events as well as generate multiple record creation reports based on primary and location groupings for enhanced statistical reporting. This will assist records administrators in their management of the HP TRIM system and enable better reporting on activities.

Russian language support
HP TRIM supports the Unicode standard using UTF-8 encoding, which simplifies the addition of new languages. HP TRIM 7.2 has added Russian to the suite of supported languages which now includes:

- English International
- English—US
- Dutch
- French
- German
- Italian
- Brazilian Portuguese
- Russian
- Spanish

How customers benefit
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 version 7.2 builds on this enterprise capability.

- **Policy control over all enterprise records**: With HP TRIM capturing and securely managing information regardless of type or source, including SharePoint Online, and Records Authority providing disposition control over records in disparate archive, customers have even greater ability to manage all records across the enterprise.

- **Automated retention control across jurisdictions**: With multi-jurisdiction retention management, records management administrators are relieved of the manual administrative disposition tasks of determining retention policies across jurisdictions prior to applying disposition.

- **Simplified HP TRIM for SharePoint Administration**: With the ability to synchronize HP TRIM classification with SharePoint term sets and determine when to manage content in HP TRIM by using the SharePoint Content Organizer, management of SharePoint content is easier to setup and seamless to administer.
- **Reduces storage costs:** With the ability to compress documents, automatically allocate documents to different storage pools according to rules and transfer documents asynchronously or synchronously, performance is improved and storage costs are reduced.
- **Faster indexing and search:** With IDOL Universal Search you get better search results faster and users have a simple, personalized search experience tailored specifically to their unique requirements. They get the big picture quickly through advanced visualization and dynamic categorization for a faster, more thorough exploration of results.

**Upgrade path**

HP TRIM version 7.2 is a minor enhancement of HP TRIM version 7 and customers upgrading from HP TRIM version 7 can upgrade clients gradually and upgrade servers when all clients have been deployed.

The upgrade path from earlier versions is as follows:

- **HP TRIM 6R2 upgrade to HP TRIM version 7.2**
  - Upgrade of clients and servers to version 7.2 in a single step
  OR
  - Upgrade clients gradually and then upgrade servers once all clients have been deployed (HP TRIM version 7.2 clients can connect to 6R2)

- **HP TRIM 6.1.x and earlier installations upgrade**
  - Upgrade clients and servers to version 7.2 in a single step (HP TRIM version 7.2 clients cannot connect to HP TRIM 6.1.x or earlier)

While the HP TRIM product version currently being used may continue to meet the customer’s needs, we recommend that customers upgrade to the latest supported version of the product. Customers should refer to the support matrix for HP TRIM when planning their upgrade. These matrices for HP TRIM are available at [http://support.openview.hp.com/sc/support_matrices.jsp](http://support.openview.hp.com/sc/support_matrices.jsp).

All customers with valid HP TRIM support contracts have upgrade coverage that provides for a replacement of their existing licenses with the most recent version. For a description of the support policy, visit [www.hp.com/go/hpsoftwaresupport/support-lifecycle](http://www.hp.com/go/hpsoftwaresupport/support-lifecycle).

**Why HP Comprehensive training:** HP provides a comprehensive curriculum of HP Software and IT Service Management courses. These offerings provide the training you need to realize the full potential of your HP solutions, increase your network optimization and responsiveness, and achieve better return on your IT investments. With more than 30 years experience meeting complex education challenges worldwide, HP knows training. This experience, coupled with unique insights into HP software products, positions HP to deliver the optimum training experience. For more information about these and other educational courses, visit [www.hp.com/software/education](http://www.hp.com/software/education).
**HP Services**: Get the most from your software investment. With HP, you have access to standards-based, modular, multi-platform software coupled with global services and support for all aspects of your application lifecycle needs. The wide range of HP service offerings—from online self-solve support to proactive mission-critical services—enables you to choose the services that best match your business needs.


To access technical interactive support, visit Software Support Online at [www.hp.com/managementsoftware/services](http://www.hp.com/managementsoftware/services).

To learn more about HP Software Customer Connection, a one-stop information and learning portal for software products and services, visit [www.hp.com/go/swcustomerconnection](http://www.hp.com/go/swcustomerconnection).

To understand how HP TRIM software can improve business process efficiency, enhance records integrity, and increase staff productivity in your organization, please visit [www.hp.com/go/hptrim](http://www.hp.com/go/hptrim).