

SharePoint and TRIM Context

The Information Lifecycle from Creation to Disposal

Information is either received or generated by individual members of staff. Typically they may be involved in working collaboratively and the information goes through some form of processing or review before it is completed and stored. Compliance demands a closer relationship between information capture or generation and the corporate ownership and management of the information.

The information lifecycle is important because the requirements of regulation and legislation often involve accessing information long after it has been created or captured. Organising information to be accessed many years into the future involves different structures than those to share information today. An effective solution considers not only the current information management requirements but provides a framework for accessing and then eventual disposal of information many years hence. Throughout this period the information must be controlled and held securely.

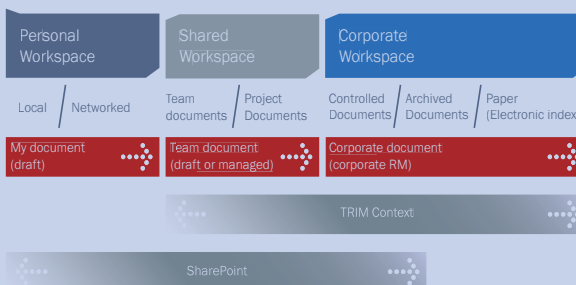
SharePoint in a Corporate Information Management Strategy

SharePoint provides some excellent facilities to manage content and process. It allows controls to be introduced over a wide range of content including documents, web pages, PDF files and e-mail messages. It incorporates out-of-the-box workflow, easy-to-use electronic forms and a consistent user experience through familiar client applications. New features in Office SharePoint Server 2007 have improved its document management capabilities

- Check-in and check-out of documents can now be enforced.
- Both major and minor version numbers of a document are now supported.
- A user is notified if a copy of a document they hold has been updated, allowing them to update their copy if required.
- A document may be held in different file formats and recognised as the same item.
- Draft item security can be enforced. A draft document is not made visible until it has been authorised.
- Support for Microsoft Office rights-managed file formats. Rights management allows the author to specify how a file may be shared and viewed.

A benefit of SharePoint has been its ability to simplify internal and external collaboration. It can empower employees to create and take advantage of people networks to connect and share knowledge more quickly and efficiently with others. It allows users to have dedicated sites, which can be used to store, present, view and manage content, information and applications. This allows information about skills, roles, colleagues and groups, distribution lists and documents to be accessible to all users. This is excellent for sharing knowledge with others. At the same time privacy control and enhanced security mechanisms allow the user to control how much information is presented and to whom.

Managing information corporately to meet the wide ranging compliance and regulatory demands in a medium or large-sized organisation requires more thorough and comprehensive approach to records management. A corporate records manager may be responsible for access, security and disposal of tens of millions of records. To administer this collection, information is classified and policies are applied to these classes. Applying policies to several thousand classes of records is still a complex undertaking but is significantly easier than apply policies to millions

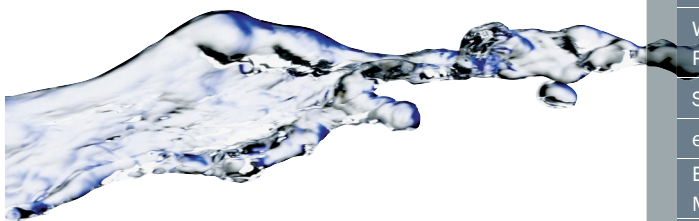


of individual documents.

TRIM Context provides the facilities to meet the challenge of managing records on this corporate scale.

SharePoint and TRIM Context – Seamless Integration

TRIM Context has proven software, TIPS SharePoint, to extend the features of Sharepoint to support corporate records management. TIPS is a connector that seamlessly integrates TRIM Context and SharePoint Portal Server 2003. Integration with Microsoft SharePoint Portal Server 2007 will be available shortly.



TRIM Context includes all the facilities to manage records corporately in the most demanding of regulatory regimes. It meets all the records management and security requirements of standards such as US DOD 5015 Chapter 4 and the UK National Archives. It provides comprehensive tools to manage a corporate classification scheme and fileplan. This includes the ability to apply comprehensive access controls, retention schedules, define metadata (information about the classes, folders and records) and maintain them with a comprehensive easy-to-use interface and full statistics and reporting features.

TRIM Context searching is integrated and unified. A single click from a browser permits SharePoint content sources to be searched across multiple TRIM Context information stores. The TRIM Context classification schema can be integrated with SharePoint portal topics to allow easy browsing or taxonomy navigation.

The TRIM Context security model is extended for SharePoint use through an integrated authentication model. Corporate security requirements are satisfied in addition to user security requirements. No addition security model or process has to be implemented.

The integration of TRIM Context and SharePoint allows the organisation to manage information effectively throughout the lifecycle. User requirements for day-to-day handling of information to deliver products and services to the customer are combined with the corporate requirements for long term storage, security, access and eventual disposal of information.

A great advantage of using TRIM Context with SharePoint is that the concepts are familiar to current SharePoint users. This reduces the amount of training required as it feels less like learning a new application and much more like an extension to an existing product.

Conclusion

Information needs to be classified, controlled and managed at a corporate level over its lifecycle to support the user and meet compliance requirements. TRIM Context and SharePoint provides the opportunity for an organisation to manage its information effectively throughout the information lifecycle.

Feature	SharePoint	SharePoint & TRIM Context
Collaboration	☒☒☒	☒☒☒
Portals	☒☒☒	☒☒☒
Business Intelligence	☒☒☒	☒☒☒
Workflow and Business Process Tools	☒☒	☒☒☒
Search Tools	☒☒☒	☒☒☒
eForms	☒☒☒	☒☒☒
Enterprise Records Management	☒	☒☒☒
Information Security	☒☒	☒☒☒
Business Classification	☒	☒☒☒
Archive Management	☒	☒☒☒
Document Life Cycle Management	☒	☒☒☒

Feature rating:

☒ = Good facilities ☒☒ = Better facilities;

☒☒☒ = Enterprise facilities.

By combining:

- SharePoint with its ease-of-use to manage and access documents, improving business insight and simplifying collaboration;
- TRIM Context providing the corporate records management platform.

The result is business can operate its two key assets, staff and information to best effect. Efficiency savings are achieved through reduced time accessing information, avoiding unnecessary duplication and creation of information that already exists. Operational and reputational risks are reduced because information is managed consistently through a corporate approach and information is disposed when it is no longer required.

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