



Records Manager 8.1

What's New

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Improved Disposal Processing

From the Release Notes:

“The aggregation rule checking no longer compares documents and folders each time there’s a change. Now that test is only at the point of disposal.”

This Means:

Previous versions could perform slowly because disposition rules were evaluated in real time. Now, HP Records Manager 8 is always fast, unless you’re actively disposing of something.

The screenshot shows a 'New Consignment' dialog box with the following fields and values:

- Destroyed: New Consignment
- Number: XYZ12345
- Responsible Archivist: McBinary, Brian (S/Admin) N/A
- Description: HR Records to be destroyed by June 2014
- Transfer To Location: (empty)
- Cutoff Date: 31/6/2014
- Disposal done on: (empty)
- Search Criteria: owner:Personnel Sub-Section or type:HR Folder

Buttons at the bottom: Ok, Cancel, Help.



Advanced Disposal Processing

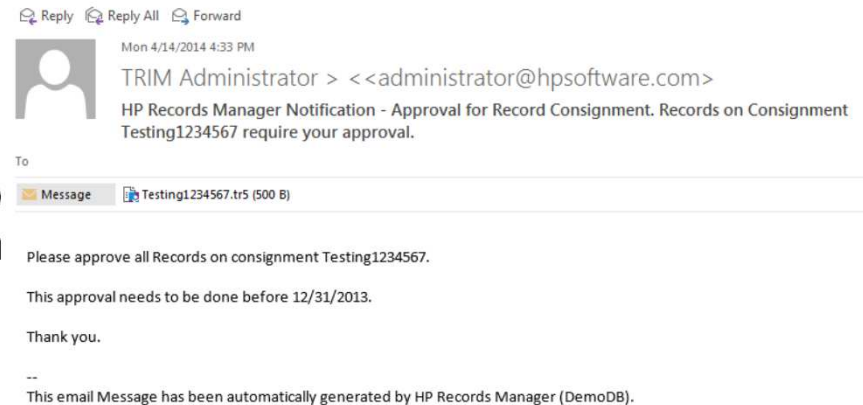
This is a New Module, that customers have to buy separately

This module guides the disposal process through the following steps:

- 1 Consignment Creation - identify the records, and who will dispose of them
- 2 Record Review and Approval – simple email workflow process that tracks disposal approvals
- 3 Disposal Execution – dispose of records, create VERS objects, capture audit trail as a record

This Means:

Records Staff can be guided through the disposal process, and be confident that all information regarding the disposal is tracked, traced and defensibly recorded.



Paper Management Enhancements

Borrowing Limit

When a user borrows a paper file from the central registry, the system automatically calculates the due return date and a reminder email can be sent to the user if they don't return the file by the due date.

Apply Limit on Borrowing Period

Borrowing Limit (Days)

Borrowing Extension (Days)

Allow users to extend booking multiple times

Request Processing

Email Notifications can be sent to people when paper records are requested.

Email notifications for Requests Service Location

Send Notifications when new Record Requests added

Email notifications for Record Requestors

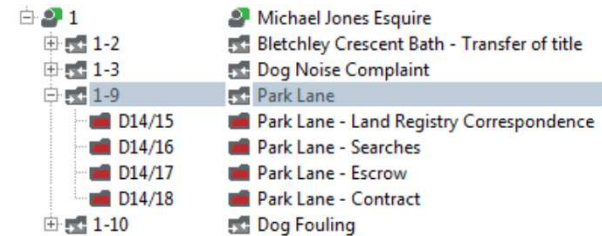
Send Notifications when a receipt acknowledgement is required



Combined Client/Matter Record Structures

From the Release Notes:

“HP Records Manager now allows for a combination of records management and legal filing structures. This can be useful in environments that are accustomed to organizing information using both legal and business management structures. .”



This Means:

HP Records Manager 8 has the ability to capture Client/Matter structures in much the same way that Worksite does. (It's always been able to do this with customized record types, but now these types are provided out of the box.) This change is largely to support ARM customers.



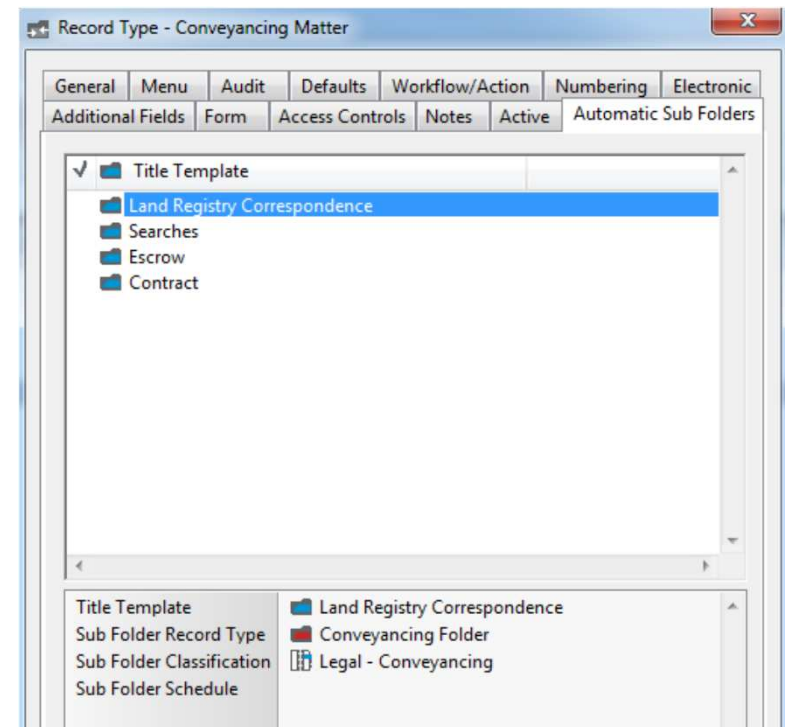
Subfolder Creation

From the Release Notes:

“It’s common for a legal matter to require the same set of folders to be created. HP Records Manager now allows for the automatic creation of folder sets based on Record Types. “

This Means:

When users create a new top-level record, all sub-folders are created automatically. Think of a council project or an employee file. Title, Classification and Retention Schedule can be set for all sub folders



Optical Character Recognition

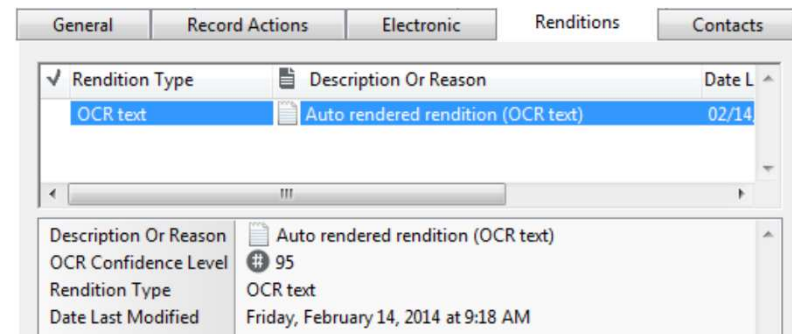
This is a New Module, that customers have to buy separately

From the Release Notes:

“OCR is concerned with making image files searchable. This has been achieved by leveraging IDOL Image Server by either manually requesting an OCR rendition or by automatically processing image files within the indexing process.”

This Means:

PDF, TIFF and compatible files that weren't document content searchable, will become searchable. **That's all that this module does.**



Automatic Classification

This is a New Module, that customers have to buy separately

From the Release Notes:

“HP Records Manager now allows for the training of IDOL categories based on Classifications. You can choose to train the IDOL categories using notes, using the first 50 records or both.

This Means:

Records can be default stored into a central holding area, and HP Records Manager 8 will automatically classify them based on document content and how well that content matches with previously classified records.

Classification - Cartography / Mapping - Digital

SAP Business Object Links Notes Access Controls Active

General Numbering Auto-Classification

This Classification is not suitable for the auto-classification process

Use this Classification to hold records waiting to be auto-classified

Make this Classification available for selection by the auto-classification process

Minimum confidence level required
70

Create containers when importing documents

Record Type for container
File Folder

Limit container sizes

Maximum contents
250

Create containers for different date created ranges
Create new date range container for every:
Month

Create containers for each owner location

Create containers for each Additional Field value
Additional Field name
Country Code

Category Training

OK Cancel Help



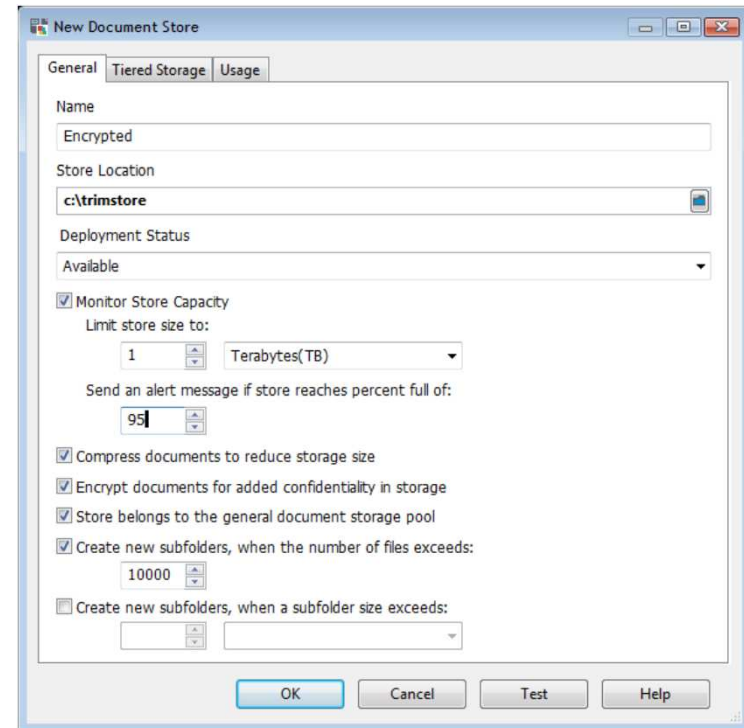
Enhanced Document Encryption

From the Release Notes:

“HP Records Manager has always had encryption of documents during communications, but in 8.1 this functionality has increased with the implementation of symmetric key encryption so that encryption can be selected for documents that are stored within secure locations. This is to prevent data center staff from viewing those documents within an electronic store.”

This Means:

If a specific document store is marked as encrypted, nobody can ever read stored documents outside of TRIM.



User Permission Changes

From the Release Notes:

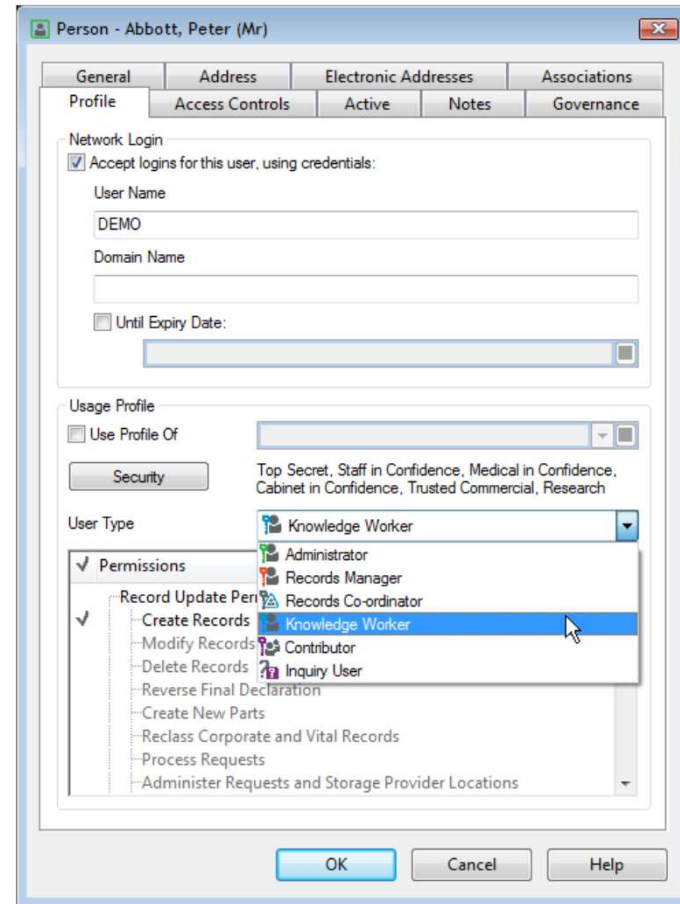
User types have changed to the following names:

- Administrator
- Records Manager
- Records Co-ordinator
- Knowledge Worker
- Contributor
- Inquiry User

HP Records Manager 8.1 no longer supports “Custom users

This Means:

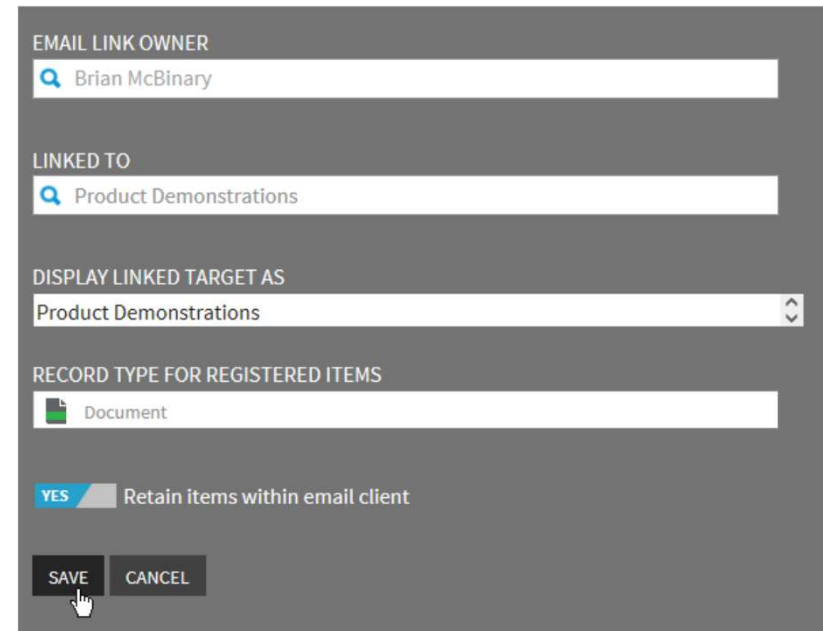
All users need to be assigned a User Type.
To address the existing standard users for different departments the ‘use profile of’ function can be used.



Office 365 Integration – Email

Users can use any HP Records Manager 8 client create an “email link” for a folder. This will cause that folder to appear in their inbox, and anything moved to the folder will be captured into TRIM.

This includes working from mobile devices, outlook web access, or the desktop.

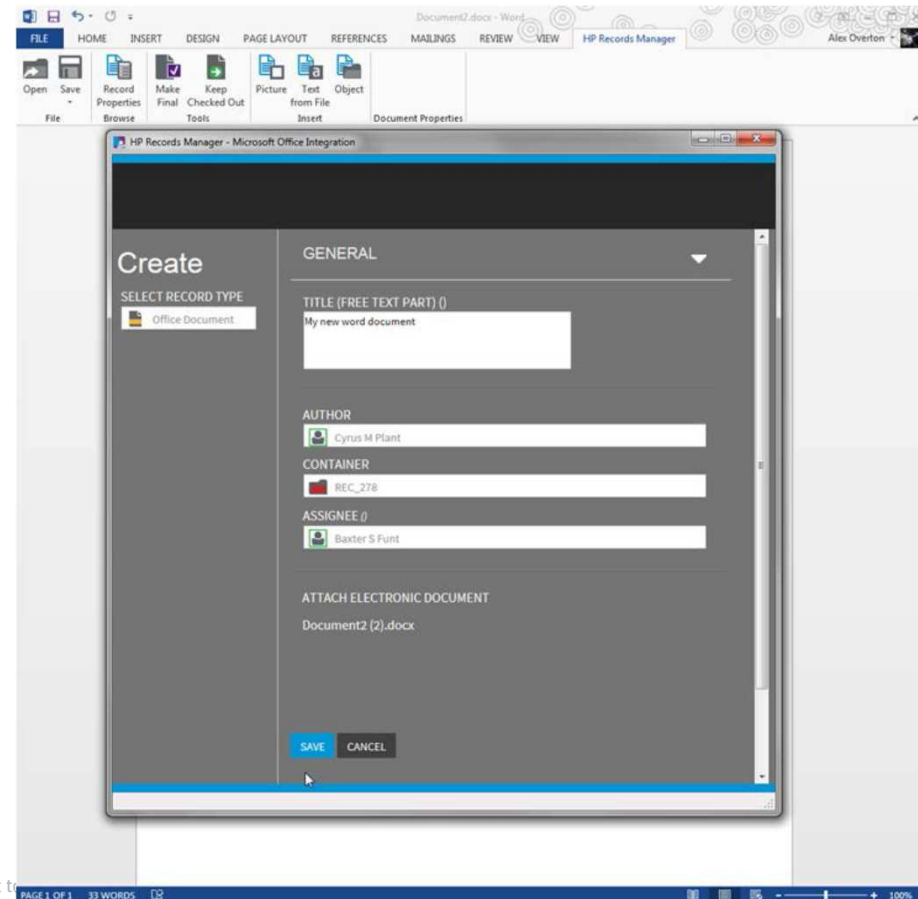


The screenshot shows a configuration dialog box for creating an email link. It has a dark grey background with white text and input fields. The fields are: 'EMAIL LINK OWNER' with the value 'Brian McBinary'; 'LINKED TO' with the value 'Product Demonstrations'; 'DISPLAY LINKED TARGET AS' with a dropdown menu showing 'Product Demonstrations'; and 'RECORD TYPE FOR REGISTERED ITEMS' with a dropdown menu showing 'Document'. At the bottom, there is a checkbox labeled 'Retain items within email client' which is checked (YES). Below the checkbox are two buttons: 'SAVE' and 'CANCEL'. A mouse cursor is pointing at the 'SAVE' button.



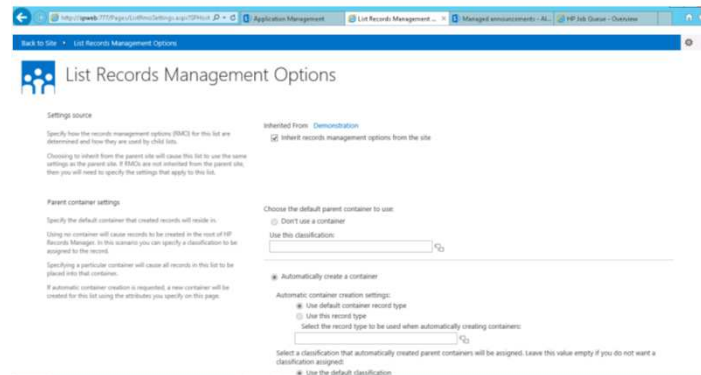
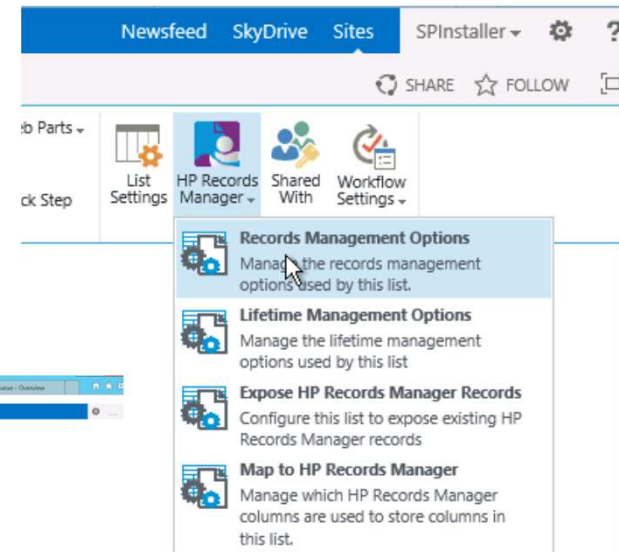
Office 365 Integration – Office Applications

Users can install a lightweight version of the Office Integration, which connects the HP Records Manager 8 web client to Office, allowing for zero footprint creation, capture and management of all office content, without having HP Records Manager 8 installed.



Office 365 Integration – Share Point

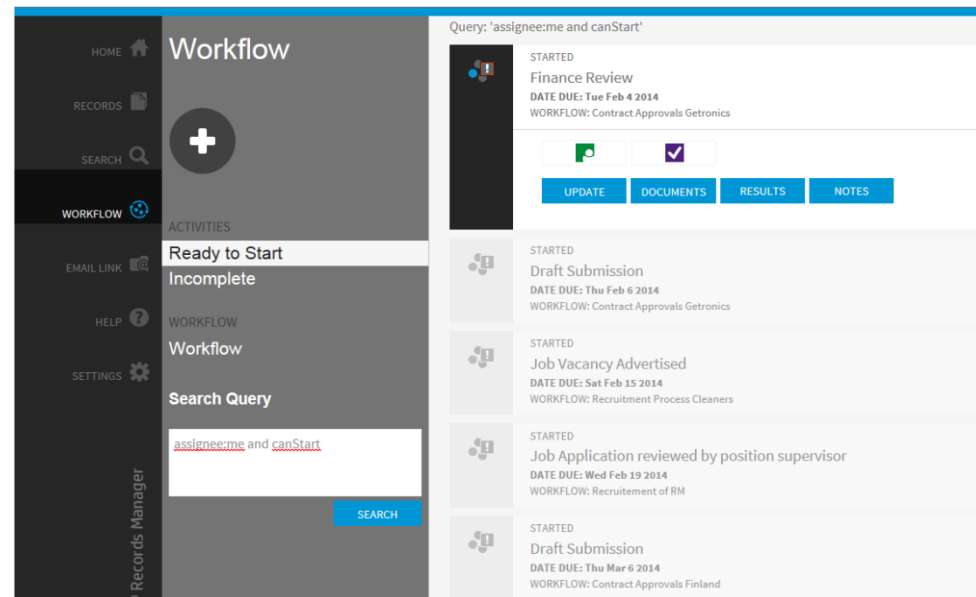
8.1 has introduced Microsoft’s remote Client Side Object Model architecture which means that HP Records Manager no longer requires a heavy foot-print in the SharePoint server farm. This means that it can be deployed to Office 365 SharePoint instances.



HP Records Manager 8 Web Client - Workflow

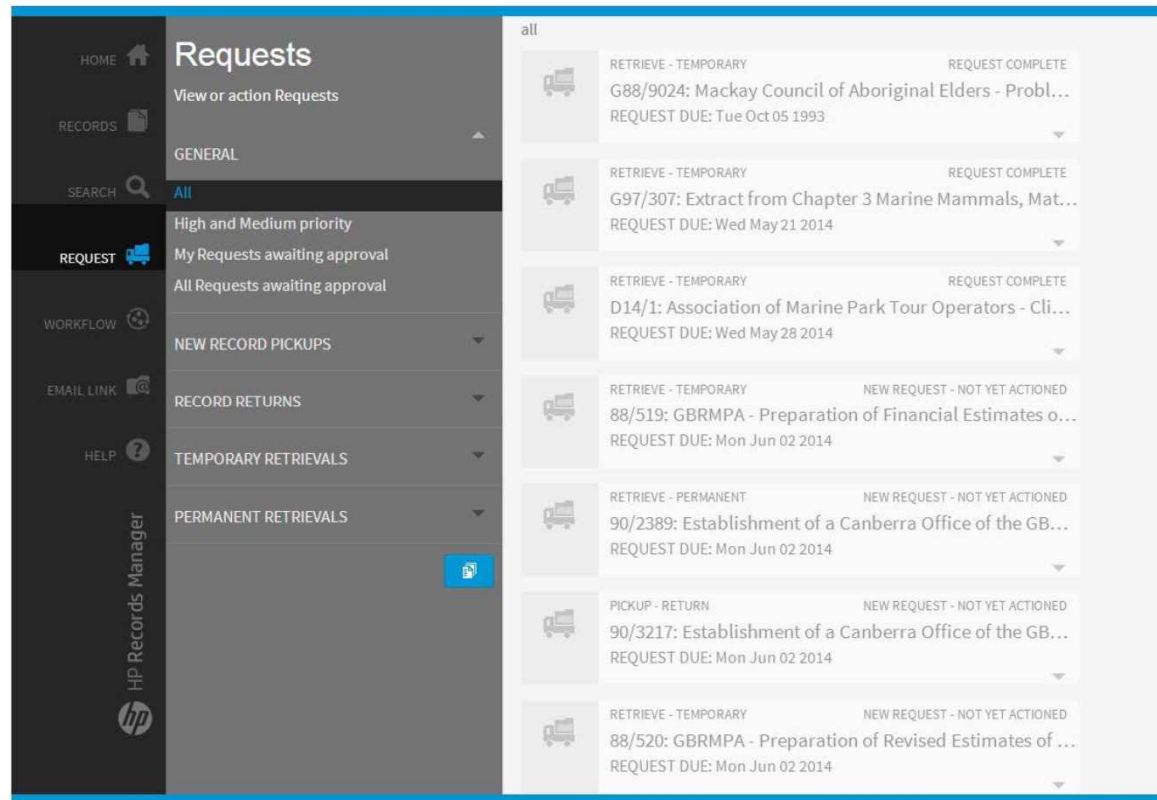
Workflow objects are now available in the HP Records Manager 8 web client.

Unique URL Links directly to objects in the web client can now be created and saved.



HP Records Manager 8 Web Client – Request Processing

Record coordinators responsible for a particular a warehouse can now view, approve and complete requests that have been made for records from within the Web Client, including printing reports of those requests.



Discontinued in HP Records Manager 8.1

Records Authority Feature

Records Authority was a SDK solution that was designed to allow HP Records Manager 8 to manage records in other systems. This has been removed in favour of the IDOL CFS Manage In Place solution.



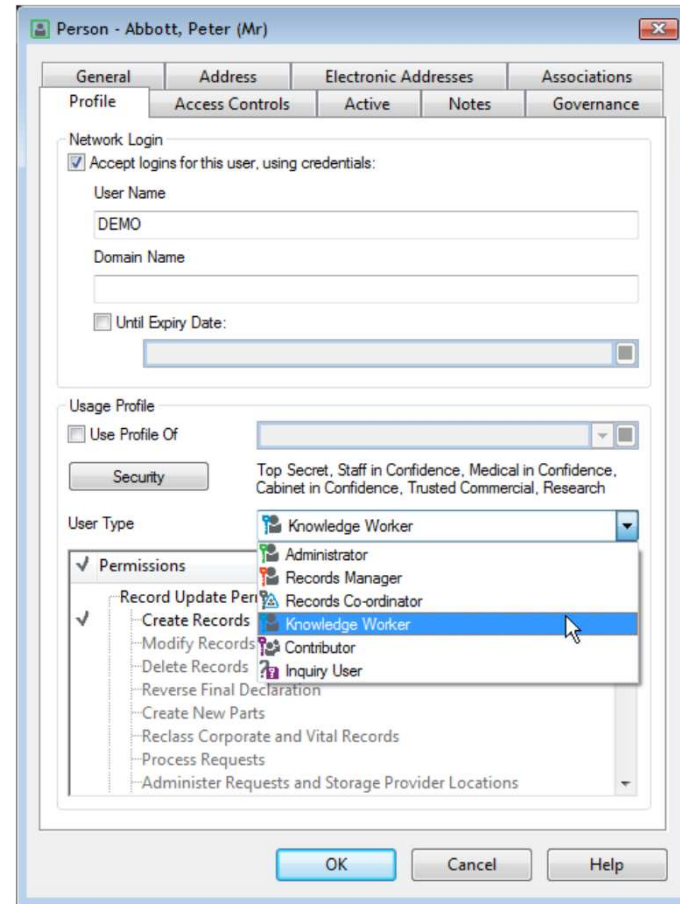
Licensing Changes

From the Release Notes:

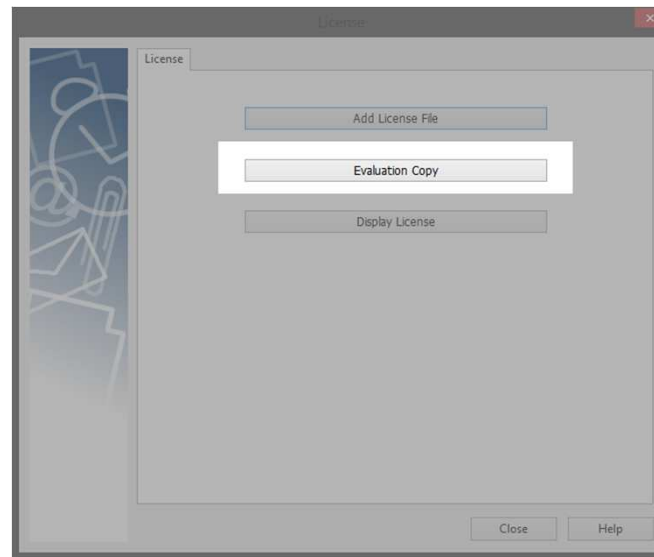
“The use of HP Records Manager has changed over recent years due to the extensive rollout across large enterprises including the different kinds of access now required. New License Metrics are now used to determine the best match for client use case and record volumes.

This Means:

Licensing HP Records Manager 8 requires knowledge of the kinds of users, and the expected volume.



The Trial Download no longer requires a separate license:



HP Records Manager 8 will generate a new 90 day evaluation license when you click this button



Where do customers get it?

HP Records Manager 8 can be downloaded by anyone here:

<http://www8.hp.com/au/en/software-solutions/software.html?compURI=1173707#.Ui1Ktd0azCQ>

And previous versions can be downloaded through SSO:

<http://support.openview.hp.com/downloads.jsp>

(You will need a valid HP Support Access ID – supplied as part of a license agreement)

