



# TRIM **context**™

Context Plain in English

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## Introduction

TRIM Context is a complete Enterprise Solution for managing all corporate information from creation through to ultimate destruction or preservation. TRIM has been developed to provide organisations with a commercial off-the-shelf solution for document management, workflow, imaging and records management. TRIM keeps corporate information safe and secure with security and access controls that are US Dept of Defence 5015.2 certified. TRIM Context's architecture is designed to support a distributed organisation and scale as required.

TRIM Context is based on a holistic view of information. An effective information management system must ensure that information is captured, registered, organized, preserved and made available to all the people who need access to it. As information may need to be accessed by different groups of people, for different purposes, it is imperative that the information system be able to deliver relevant information to each group in a timely manner. TRIM Context has been developed with these requirements in mind. The system combines elements from virtually every document management technology to ensure that the needs of all groups can be accommodated.

TRIM Context is designed to accommodate information management for a distributed organisation and provide fast response times in an efficient manner whilst maintaining data integrity. TRIM Workgroup Servers are fully redundant; therefore require no monitoring, backing up or management.

## Architecture

TRIM Context has 2 Server components, a Synchronisation Server and Workgroup Servers. Workgroup Servers are physically placed to service a local area. You can have as many Workgroup Servers that you require. There is one Synchronisation Server per RDBMS. The Workgroup Servers support their local clients and the Synchronisation Server ensures the Workgroup Servers are kept up to date.

The multi-tier approach gives enormous scalability. You can physically establish as many Workgroup Servers as it makes sense to have. TRIM Context provides freedom and flexibility too as there is no licensing cost per Server. Performance for a distributed organisation is greatly enhanced with benefits such as local access to metadata and document/object caches.

### Architecture features – benefits

Trusted Network Authentication – no requirement to log on manually.

Connection Pooling at the Workgroup Server – no delay in logging on.

Use of Static and Dynamic cursors – efficient usage and transfer of data.

Buffered Reads and Transmit only at the time of commit – reduces affects of latency.

No desktop ODBC configuration – simple rollout.

Workgroup Servers are fully redundant - requires no monitoring, backing up or management.

Database and Object Caching – increases system response and speed of access/retrieval.

Synchronization Server - No synchronisation errors, remains real time and online.

Object Streaming – Displays the document as it is being retrieved.

## Caching

TRIM provides caching technologies for the Client and the Workgroup Servers. It is the caching technology that gives the single largest benefit to the end user. The client maintains a cache for metadata and objects accessed (analogist to the cache of a Web Browser) whereas the Workgroup servers maintain a cache of database tables and object store caches. The object store cache is broken into two components, retentive cache and pre-emptive cache. All caching can be turned on/off, configured and tuned to suit an organisation or WAN infrastructure. TRIM's approach to caching ensures old information cannot inadvertently be retrieved.

## TRIM Enterprise Manager - Microsoft Management Console

The use of Microsoft's Management Console (MMC) provides all the tools necessary to manage the database and ancillary components. TOWER Software have developed an MMC snap-in for use with TRIM, which provides an intuitive graphical user interface that DBA's will be familiar with.

## Event Processor

TRIM Context has a background Event Processor for handling bulk changes and non-critical indexing in the background. This allows users to continue functioning whilst process intensive tasks are taken from the client and processed in the background.

## TopDrawer

TRIM has a "TopDrawer". The analogy is to the top draw in ones desk. It is designed as "working space" where documents are checked in and out, edited/modified and where drafts reside until they are checked in. The TRIM TopDrawer integrates at the desktop with common applications and e-mail programs.

TopDrawer is installed as a Windows "named space". This means it becomes a component of Windows itself, similar to "My Documents" or "Network Neighbourhood". TopDrawer can be accessed from anywhere within Windows. For normal usage of the record keeping/document management system, TopDrawer is all that is required by general staff for complete interaction with corporate records and documents.

TopDrawer has a fully exposed API and has support for multiple databases. Embedded within the Windows Explorer TopDrawer is TRIM's multi-format document viewer.

Further integration is available by enabling ODMA integration with authoring applications (such as Microsoft Word) for overall tighter desktop integration.

## Workflow

TRIM has a fully graphical workflow design tool which, to drive, requires understanding of processes, not IT. TRIM Workflow is intuitive and can be created with a mouse and an understanding of what you wish to achieve. Features of Workflow include:

- Parallel activities
- Decision branching
- Nesting (workflows within workflows)
- Process or record centric
- Graphical view
- TopDrawer/TRIM/e-mail integration
- SDK (fully exposed in TRIM API)

## Web Services

TRIM Context is fully Web enabled. A design objective was to provide Web delivery that enabled Internet Document Management whilst maintaining the same look and feel as TRIM Context from within a Web Browser. ActiveX controls allow TRIM Context to provide Web delivery using Microsoft's Internet Explorer for client access. TRIM's Web server is called ContextWeb.

## E-mail facilities

TRIM integrates with Microsoft Outlook, Lotus Notes and Novell GroupWise. Facilities are provided to capture/classify/catalog from within your e-mail client. Additional facilities exist for mapping Outlook folders to Files in TRIM, and then e-mail management is as simple as dragging and dropping the e-mail on the appropriate folder. A "toggable" button for catalog on send has been provided as well as the ability to attach information from TRIM when sending e-mails.

## CRM

TRIM Context provides a titling method that is based on the locations/contacts structure. This titling method shifts TRIM from being Record centric to being Contact centric. Therefore the full power of TRIM is available for Contact management, including navigational facilities from records to contacts and vice versa.

## Digital Signatures

TRIM Context has support for digital signatures. This allows digital signing and verification for purposes of authenticity. TRIM supports Public/Private key infrastructure.

## Security

TRIM provides:

- Security levels and caveats
- Access control
- Logon (functional capability given)

Separate Access Controls are available for:

- Create Records
- View Documents

View Metadata  
Update Document  
Update Metadata  
Modify Access  
Delete/Destroy Record

## Multiple renditions

TRIM Context has the ability to store multiple renditions and the application rules to support them. Multiple Renditions / transformations include (but are not limited to):

Annotation text  
OCR text  
Long-term storage format (e.g. PDF / TIFF)  
Display format

## Compound Documents

TRIM Context has comprehensive support for Compound Documents, below are some listed features:

Interrogates at the OLE level on capture  
Supports checking in and checking out  
Links can be maintained internally or externally of TRIM  
Supports cascading links on capture  
Links can be modified, customised and be made relative or absolute.

## User-defined fields

TRIM Context allows user defined fields to be created as required. Created fields are available for global use and fully searchable. Fields types can be defined as Text, String, Date, Number, Boolean or Decimal.

## Hold's

A "hold" is a mechanism by which all activity may be suspended for documentary records that are the subject of, or may be involved in litigation. "Holds" can be defined as required and documentary records may be associated with defined holds.

## Locations Subsystem Re-engineered

Contacts, Organisations, Staff, Units and Positions entities are rearranged (conceptually flattened) and the retrieval and management tools are considerably enhanced. Enhancements include:

Roles  
Profiles  
Notes (searchable)  
Support for Graphics and URL's  
Relationships

## Favourites, References

TRIM Favourites will be provided through the familiar "Outlook Bar" interface style. Key Favourites supported are:

Records  
Containers  
Documents  
Locations  
Workflows  
Classifications  
Retention Schedules  
TRIM Trays – Work Tray, In and Due Tray

## Property sheets

The properties of a record will display the original Record Entry Form used for creating the record. This provides a mechanism for changing data from a familiar view (the Record Entry Form that end users become familiar with) without the need to know the specific Task command to carry out the required change. All components of TRIM have a properties option to allow quick access to attributes.

## Dockable Toolbars and Windows

TRIM Context has many Toolbars that can be turned on and off, can “float” or be docked.

Toolbars can be customised and the facility exists to make your own. Various Windows can be viewed with the capability to Dock a window. TRIM Context is highly user configurable, with a “Hot-key” to switch the interface to a default setup for support purposes and vice-versa.

## Drag and drop

Support exists within TRIM Context to allow Drag and drop. Actions such as changing container can be achieved by dragging and dropping the records from one container to another. Drag and Drop is supported as a method to capture information into TRIM as well.

## Report Designer – WYSIWYG

TRIM has its report writer that allows reports of all types to be created. TRIM's report writer supports drag and drop of fields/titles and has a WYSIWYG layout representation.

## TRIMage

TRIMage is a scanning utility that allows documents to be scanned directly into TRIM. Has support for multi-page TIF's.

## TRIMPort

This is TRIM's import utility that allows for the easy import of records. It also allows importing of data to all functional areas of TRIM, such as the Thesaurus, Classification and Locations sub-system.

## XML

Allows not just records, but other components within TRIM Context (such as Retention Schedules, Locations etc.) to be exported to XML. XML permits the efficient and standardised "packaging" of data and objects such that Business-to-Business (B2B) transactions are facilitated and archival needs are supported. A TRIM container record and all contained records (including documents/objects) may be exported as a single XML object.

## SDK (API)

TRIM Context has all features exposed via the API (includes Workflow and TopDrawer). If you wish to design customised interfaces or drive TRIM programmatically, there are no limitations.

The SDK includes full documentation of exposed properties and methods. Features of the SDK include:

Multiple Database Support

TRIM "Fully-Exposed"

Runs in-process as a DLL

ActiveX Library for user interface functions

Record Browser

Document Viewer

Record Data Entry Form

Miscellaneous Controls

Any COM compliant programming language or scripting language can invoke TRIM's API; i.e.,

Visual Basic, C++, JavaScript, Powerbuilder, etc..

## Further TRIM Strengths

### Relationships - navigate - search

TRIM has strong relational functionality. The RDBMS architecture supports in excess of 80 separate tables. This genuinely rich back-end structure supports many and varied search methods, over 90 independent search methods, that can be compounded together if required using Boolean expression. This ability provided by TRIM to search and "drill-in" is unsurpassed by any other product in the marketplace.

Another advantage of the rich back-end that TRIM provides is the navigational ability that is achieved. TRIM allows you to "navigate" from any record or point of reference to any other relationships or dependencies that exist.

### Tag 'n' task

A feature of TRIM is the ability to work with many records at a time and carry out like tasks simultaneously to identified records. The process of identifying those records is "Tagging". Records can be tagged (in groups or individually) then a "task" command can be carried out to all tagged records: hence the term, Tag 'n' task.

## Document controls and business rules

TRIM is developed out of the box solution; it has achieved COTS standard (Commercial off the shelf). This means it is quite effortless to install and have functioning. TRIM provides many common-sense business rules that assist organisations to achieve their desired result quickly and effectively.

TRIM has many controls/tools in place. Traditional titling and numbering options exist, such as Thesaurus and Classification (Record Plan). TRIM also provides controls to ensure the integrity of data by the end user. These controls include lookup sets (e.g. Document Type), validation lists (e.g. location listings, workflows, retention schedules) and substitution lists at the data entry point (record entry form). Lists and controls are created and maintained (or delegated) by the System administrator.

## Conceptual implementation/overview

The graphic supplied is comprehensive and combines all potential approaches; it is therefore somewhat "busy".

The graphic itself is conceptual in that a Workgroup Server could actually be many Workgroup Servers. For example, in Canberra, the four components shown in the Workgroup Server could be on one Machine, two or four machines. There could also be multiple Workgroup Servers servicing many floors in a building, this is not shown. Conceptually, the idea is to show the components that make the solution, it is not how many Workgroup Servers you need.

The Synchronisation Server is purposefully shown as a component of a Workgroup Server (which will always be the Workgroup Server located near the RDBMS). This ensures the Synchronisation Server is not perceived as a bottleneck, it is perceived as a component.

Database replication is not a component of Context; it is a feature of the RDBMS – a feature that Context can work with.

### Brief description of psuedo implementation:

**Canberra** - Head office – hosts authoritative data (RDBMS, Store and DCI)

**Sydney** - Large user base and has own ContextWeb Server to provide browser access for some sections. Given large user base, database replication option has been chosen along with a replicated DCI to provide local access to corporate data without impacting the WAN.

**Melbourne, Brisbane and Adelaide** - No issues, standard installation

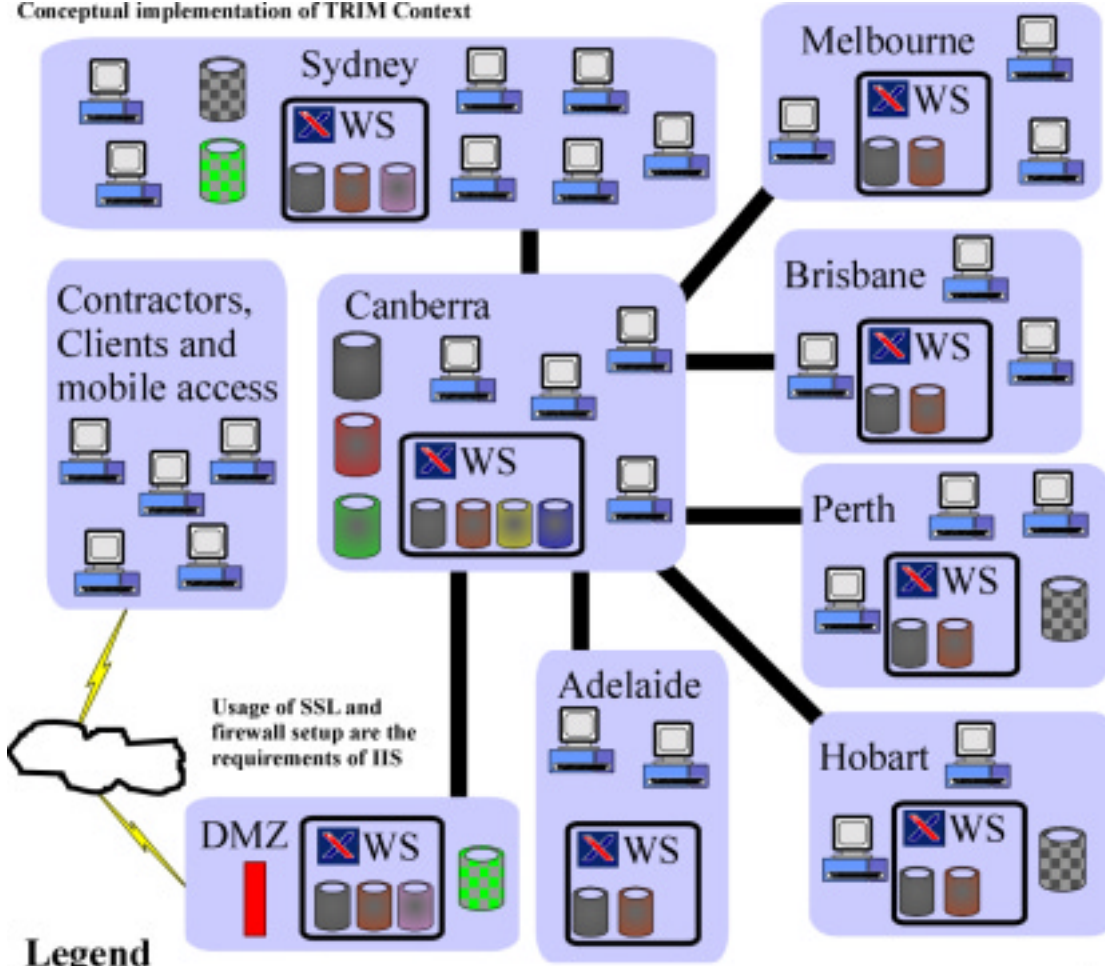
**Perth** - WAN link suffers from inherent latency; a replicated database has been chosen to overcome that problem.

**Hobart** - WAN link has low bandwidth and frequently congested. A replicated database has been chosen to assist the problem. The impact of replication would need to be value assessed, no sense in providing a replicated database if the impact

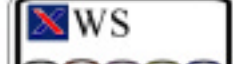



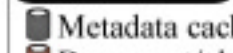

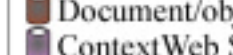

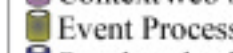








of replication hurts the WAN more than TRIM access. Database replication is not a Context thing, it is specific and proprietary for each RDBMS – as is the impact.

**DMZ - External Access** - Shows the isolation, protection and security for functional Internet access. Replicated DCI to accommodate frequent DCI searches.

Conceptual implementation of TRIM Context



**Legend**

- |   |  |
|---|--|
|  TRIM Context Workgroup Server |  RDBMS                        |
|  Metadata cache                |  Document/Object Store        |
|  Document/object cache         |  Document Content Index (DCI) |
|  ContextWeb Server             |  Database replication         |
|  Event Processor               |  DCI replication              |
|  Synchronisation Server        |  Client Workstation           |
|  Local Area Network            |  Wide Area Network link       |
|  Internet Access               |  Firewall                     |
|  Telecommunications Provider   |  |