

# Windream

## ► Universal document management for all requirements

Windream is the first document management system worldwide which has completely been integrated into the Windows operating system. The outstanding feature is its intuitive handling. Windream does not require a separate user interface.

The patented VFS-Technology, on which Windream is based, presents the

DMS as an additional network drive in the Windows Explorer. VFS stands for Virtual File System.

It allows users to acquire documents as files in the DMS via the "Save as"-command of the Windows standard applications and via the corresponding functions of the Windows Explorer. Windream supports the file formats of

all programs operating under Windows. All usual commands for file operations can be used in Windream without restrictions. Thus, documents can be moved, copied or deleted with drag and drop operations and via the respective menu commands of the Explorer.

Even document links on the basis of OLE cooperate seamlessly with the DMS.

**Product range.** Windream is offered in three different product variants:

- The Standard Business Edition (SBE) has especially been designed for smaller and medium-sized companies.
- The Standard Business Extension (SBX) addresses the same target group, but enhances the SBE-version by additional DMS-specific functions.
- The Business Edition (BE) has primarily been designed for specific requirements of large enterprises.

## Standard Business Edition (SBE)

The Standard Business Edition is the basic version of the DMS.

## ► Acquiring and indexing

Documents can be acquired from any Windows application. In order to save documents in the DMS, the user selects a destination folder of the Windream drive using the "Save as" menu command.

Each document is described by an object type in Windream. An object type classifies documents and folders in the DMS according to their specific properties. The properties are described as indices, which allow an individual storage and quick retrieval of documents and folders in the DMS.

Windream even supports the indexing of documents via the Windows Clipboard. Selected parts of a document are assigned to an index field using a simple dropdown list.

**Indexing.** Besides synchronous indexing, which has been designed for entering index criteria during the acquisition of documents, indexing can also be executed asynchronously. The indexing will then be executed later. Thus, users can first acquire a whole number of documents without having to interrupt the storage process in the DMS.

### Indexing documents and folders:

- Synchronous/asynchronous indexing
- Applying system-specific file properties
- Automated fulltext generation
- Indexing on the basis of a selected object type (document or folder type)
- Enhanced file properties for viewing DMS-specific information
- Individual layout for index dialogs
- Automated assignment of indices
- Automated application of index data from databases by scripts
- Indexing via the Windows clipboard



## Windream

- **Document** management for all Windows applications
- **Directly** saving and opening documents with common standard application commands
- **Enhanced** Windows Find-function by Windream-specific document retrieval
- **Low** introductory and follow-up costs with a minimum of administration and training efforts
- **No** expensive integrations and adjustments to existing and future applications

### Document retrieval

Windream provides efficient retrieval functions which can be used in addition to simply browsing in the Windream directory structure. All Windream-specific find functions are enabled via the "Find" command from the Windows Start menu.

**Quick search.** The quick search allows users to conduct a query according to a single search item. A query can be limited to a group of possible authors (creators), to an object type or to a specific date.

**Index search.** Index values are conveniently combined to a complex query by selecting indices from dropdown lists and connecting them with logical operators. For example, the collection of search criteria is executed on the basis of an object type, on the basis of frequently used indices or according to date and time stamps. The index search also allows a user to execute a query via several object types simultaneously.

**Search via Object types.** When executing a search via object types, the retrieval process is conducted according to the properties of a selected object type. The input dialog is the same as the index dialog and is used to retrieve documents which have been assigned to the selected object type in the DMS.

**Fulltext search.** Additionally, documents can also be found according to parts of their contents when using the Quick Search or the Index Search.

**Search profiles.** Users can save their search queries and use them again. Saved profiles can also be sent to other users via e-mail. Thus, a repeated entry of complex search criteria is not necessary.

**Result lists.** Windream presents all documents which match the search criteria in result lists. The results of a conducted search can be stored and used again. The design of the columns in the list can be configured individually via a dialog.

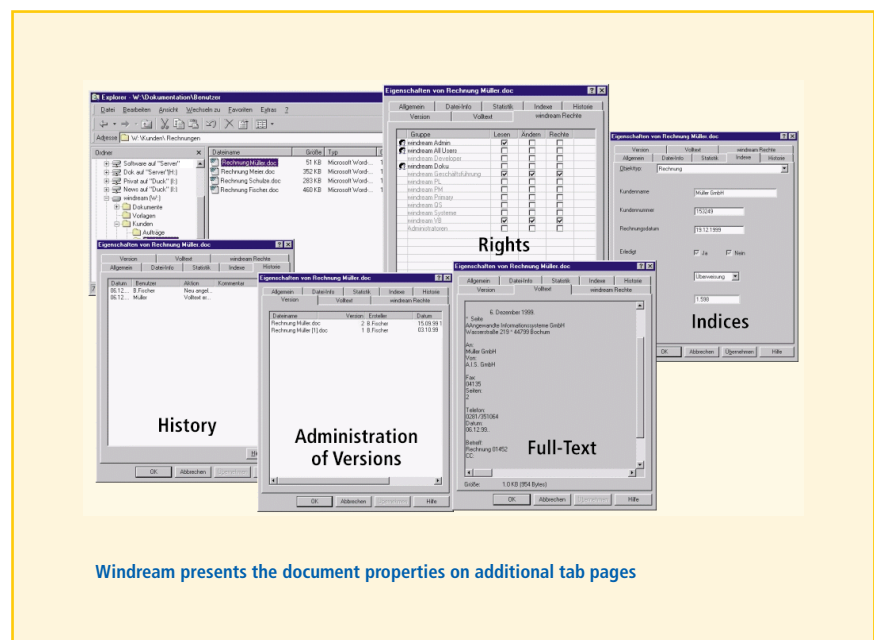
### Document properties: a survey

The file properties which Windows provides for each object have been enhanced by several tab pages in Windream.

**Index.** Displays the index information of a selected document in the fields of the respective tab page. The layout and the input fields of the tab page are created in the Windream Management Console.

**Rights.** Access rights protect the document from illegal access. The access rights of the Windream users and groups concerning a selected document can be viewed and modified here. Authorized users are allowed to change the rights of other users and groups.

**Lifecycle.** This tab page shows the determined lifecycle of a document in the Windream Standard Business Extension. The page contains all relevant information concerning the lifecycle



Windream presents the document properties on additional tab pages

**Fulltext.** The contents of a document is presented on this page, if the fulltext extraction has been started before.

**Version.** Windream displays all previous versions of a selected document on this tab page, including date and time of creation. A previous version can immediately be opened with a double click on the respective entry of the tab page.

**History.** The history lists all actions in chronological order, which have been executed on a selected document until now. For example, this is information on the creation and modification date or the creation of a new version.

and presents important data as a graphical time bar. Authorized users can make document-related changes concerning the editing and archiving periods of documents, which have been determined as lifecycle rules.

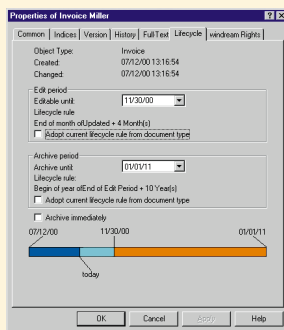
**In addition** to the tab pages described above, the Windream-specific columns in the Explorer listview also present frequently used file attributes. The column view can be configured individually.

## Standard Business Extension (SBX)

The Standard Business Extension enhances the Standard Business Edition by further DMS-related functions.

### ► Lifecycle

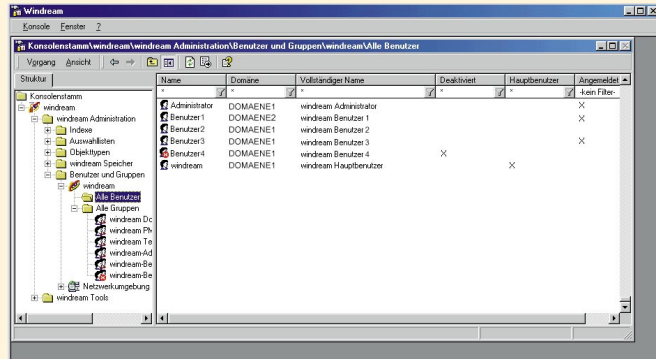
Within a business environment, documents are always integrated in workflow processes and thus in a lifecycle, which can be divided in an editing and an archiving period. Archiving documents according to defined rules is executed automatically in Windream on the basis of the assigned document type. However, the lifecycle administration also includes manual archiving as well as a final deletion at the end of an archiving period. The lifecycle administration can be used for archiving documents on optical media and in cooperation with the Windream Jukebox support. Archived objects cannot be edited any more.



Viewing lifecycle data of a document

**Depending** on the assigned document type, archiving processes are executed according to the following criteria:

- Immediately: new documents are immediately moved to the archive after they have been indexed.



Windream Business Edition: Integrated user and group administration

- Via time control according to lifecycle rules: editing periods are defined in days, months and years on the basis of the creation or the modification date.
- Manually: In certain cases, workflow processes require a change of the currently valid lifecycle rules. Manual archiving and a document-related modification of defined periods is possible any time. However, it requires an explicit setting in the Windream Management Console. Only an administrator who has access to the Management Console will be able to release this specific function.

Archived documents are still retrievable via the common Windream mechanisms until they are deleted.

### ► Check-out/Check-in

If documents stored in Windream shall be edited over a longer period, users can export the desired documents via a check-out process. As long as the documents are kept in check-out mode, Windream will only allow other users to read them. Previously checked-out documents are checked into the DMS again with the corresponding command. Documents can also be checked-out and checked-in recursively in one process. In addition, it is also possible to undo a previous check-out process.

## Business Edition (BE)

The Windream Business Edition mainly concentrates on the demands of larger enterprises. Thus, the BE version is used as a high performance system in companies that want to support an unlimited number of users and groups in a complex system environment. The group assignment of all users is based on the existing user administration of the operating system.

**Windream access rights** can be assigned for single users and groups and allow an administration down to the level of a single document in the DMS. The rights assignment can only be executed by authorized users. This complex, but nevertheless easy to manage system allows an individual DMS adjustment to different company requirements, independent of its size.

### SBE, SBX and BE: Common functions

Specific Windream functions are available in all three product variants.

Besides the additional tab pages presenting the file properties, these are the enhanced Explorer pop-up menu and the Windream Management Console for efficient system administration.

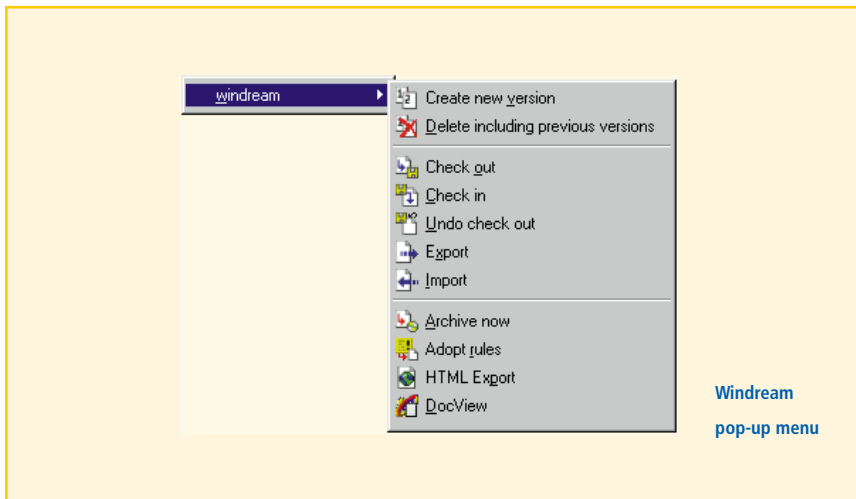
### Pop-up menu

The Windream pop-up menu includes DMS-specific functions with which the following operations can be executed. The commands are valid for all documents marked in the Explorer view:

- Create a new version
- Delete documents including previous versions

### Windream Management Console (WMC)

The Windream Management Console offers efficient methods for administering the system settings and the object types of the DMS. The application neither requires deeper knowledge in database management nor any experience in development tools. The WMC is a snap-in module of the commonly known Microsoft Management Console.



**The WMC** has been designed as a tool for creating and administering the object types and indices. With its integrated Layout Editor and the Palette, a system administrator arranges and describes the data fields which are used to enter the index criteria for documents. In addition, scripts can be assigned to each object type (Java, VB), which operate as event-related processes. Thus, for example indexing jobs can be automatized.

**Additional tools** of the Windream Management Console allow to administer the user and group accounts of all users who work with Windream. This also includes the import of accounts from the operating system environment.

**Existing object types** from other Windream systems can be imported with the WMC. The other way round, object types can also be exported and made available to other Windream systems.

### Data exchange

Documents can be exported via the commands of the Windream pop-up menu. Windream exports documents including index data either in HTML or in XML format. This way, complete document types or dropdown lists can be exported or imported, or they can be exchanged between different Windream systems.

- Check-out, check-in and undo check-out for documents and folders including index data in HTML or XML format (SBX and BE only)
- Import and export of several documents in one process
- Move documents to an archive area immediately
- Immediate archiving also allows ad hoc archiving different from currently valid lifecycle rules (SBX and BE only)
- Apply new rules for documents, if changes on the lifecycle have been made (SBX and BE only)
- View index data on an HTML page
- DocView for document preview (optional)
- Individual extensions (for example via scripts)

The integrated reporting function records all events which have been executed with the pop-up menu in a separate logfile.

## Optional Windream components

The DMS can be enhanced individually by additional modules. Besides the Windream Managent Console – which has already been integrated in all versions – the Software Development Kit (SDK), the document preview named Windream DocView, the Windream Office-Bundle, the Windream Exchange solution, the Windream Jukebox Support and Windream SecurArc are optional.

## Software Development Kit (SDK)

With the SDK, Windream GmbH offers Software companies and system integrators an opportunity to implement the DMS into solutions provided by third party suppliers or to develop their own solutions. The SDK provides a complete description of the Windream object model with example code that presents a whole variety of application sectors. The SDK supports all common development environments.

## Windream DocView

DocView is a component which displays a document preview for objects stored in the DMS. This module can view more than 200 file formats. With DocView, users will be able to read documents without having to open the corresponding application program.

## Windream Office-Bundle

With the Windream Office-Bundle, users can archive incoming and outgoing e-mails automatically in the DMS. Another integrated module allows to archive fax messages of Symantec's WinFax Pro.

## Windream Exchange

Windream Exchange is a solution which automatically forwards e-mails from Microsoft Exchange Server to the DMS. Forwarded Exchange messages can be administered very easily with Windream-specific DMS functions.

## Windream Jukebox Support

The basic functions for archiving have already been implemented in each Windream edition. Furthermore, the Jukebox support allows to archive documents in a revision secure way. Documents stored in the archive are accessed via the DMS.

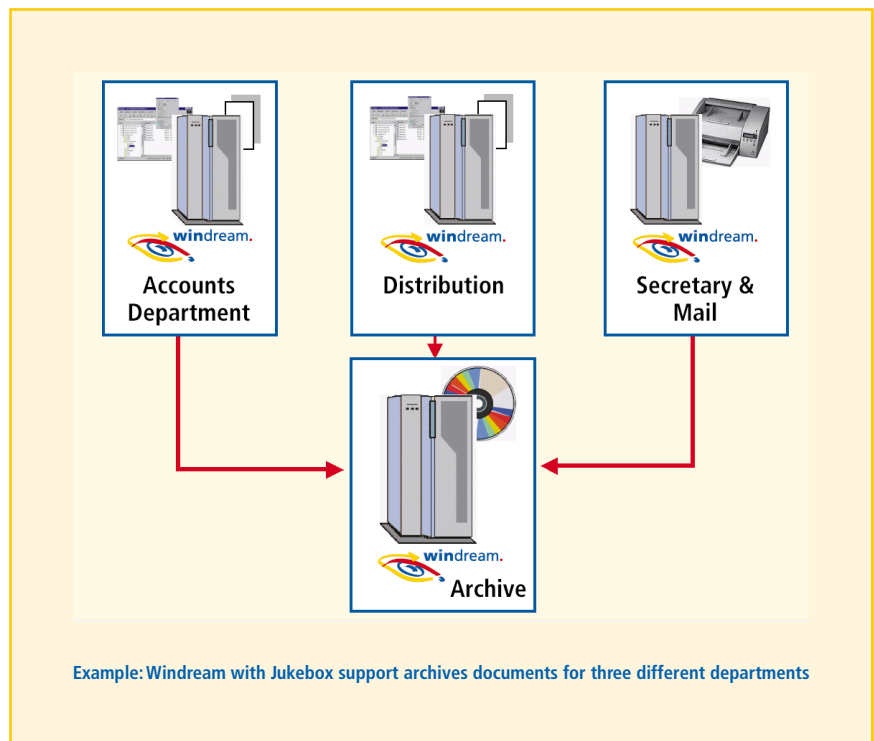
**Reliable and revision secure.** The Windream Jukebox support has proven its solidity for a long time and with many customers. It is used on different operating system platforms.

The Jukebox support cooperates with different Jukebox technologies. These technologies include archiving on CD-R, MO, WORM and DVD media.

**The reliable archive concept** allows individual scalability, beginning with a Single Server configuration, which enables Windream system components to cooperate with the archive system on one Server. Due to its modular concept, installations with dedicated application, database and archive Servers can be configured as well.

## Windream SecurArc

Windream SecurArc is an optional module of the archive. The Software uses digital time-stamps for quickly identifying possible data manipulations and checks archiving dates of documents.



## ► Performance data

### Acquisition functions

- Storing documents in the DMS using the "Save as" menu command from all Windows programs
- Administration of any filetype
- Importing documents via drag and drop
- Importing available data

### Index functions

- Object type-related description of document properties
- Synchronous and asynchronous indexing (post-indexing)
- Fulltext extraction
- Hierarchic filing structures
- Document histories

### Archive functions

- Archiving in the filing structure of the Server
- Lifecycle management with definition of editing and archiving periods
- Support for all common storage media and jukeboxes
- Flexible archive concept

- Mirrored archive Servers for data protection
- Access to the archive system with customer-specific programs
- Intelligent, hierarchic storage management
- Certificates granting completeness of documents and the complete archive
- Transaction: secure data transmission with check of consistency

### Retrieval functions

- Search via Windows Start menu
- Queries can be used again by storing profiles
- Quick Search
- Index Search
- Fulltext Search
- Object Type Search (documents and folders)
- Browsing in folders using the Windows Explorer
- Flexible listing of search results

### Edit functions

- Automatic launch of the program with which a document has been created
- Assignment and modification of rights
- Flexible administration of versions
- Check-out/check-in of documents
- Document export and import
- Export of index data in HTML or XML format

### Administration functions

- Convenient administration of user and group accounts with the WMC
- Administration of access rights
- Creating and designing object types
- Lifecycle management

### Flexibility functions

- Script implementation: Windows Scripting-Host
- Interfaces/standards: ActiveX Controls, COM/DCOM, OLE-DB/ADO, XML, HTML

### Security functions

- Improved data security
- Revision secure archiving
- Access protection by assigning flexible access rights
- Windows login is used as Windream login
- Easy handling by integrated online help system with user guide



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