

windream SBE
windream SBX
windream BE



**The universal enterprise
content management system
for all requirements**



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windream is the first enterprise content management system worldwide which has completely been integrated into the Windows operating system. Its outstanding feature is the intuitive handling. windream does not require a separate user interface. The patented VFS-technology, on which windream is based, presents the ECM-system 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 ECM-system 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 ECM.

Product variants. 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 ECM-specific functions.
- The Business Edition (BE) has primarily been designed for specific requirements of enterprises.

Standard Business Edition (SBE)

The Standard Business Edition is the basic version of the ECM-system.

Acquiring and indexing. Documents can be acquired from any Windows application. In order to save documents in the ECM-system, users select 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 ECM-system 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 ECM-system. 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 ECM-system.

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 started 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 to 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 ECM-system.

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 extended 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.



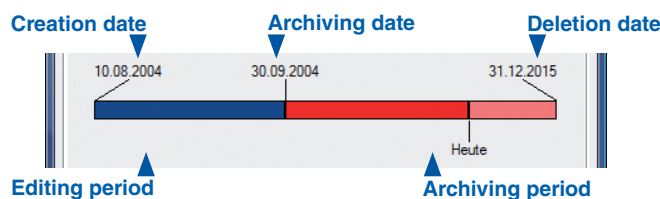
Fulltext. The fulltext contents of a document is presented on this tab page. windream extracts the fulltext from documents automatically. It is also possible to acquire further fulltext manually. This text will not be generated by the windream indexing service, but must be entered manually.

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.

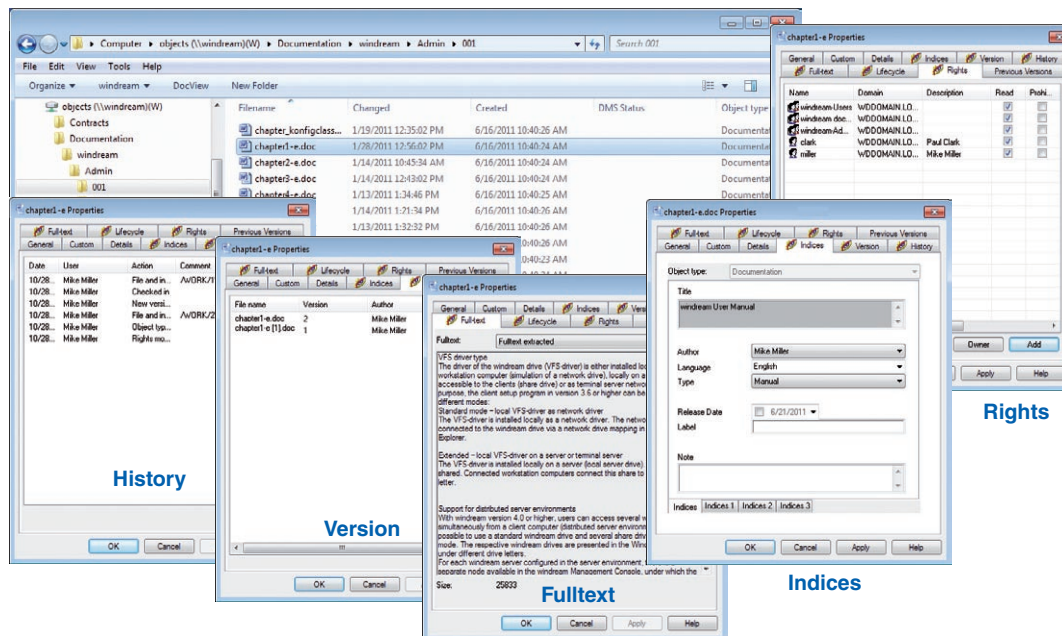
History. The history lists all actions which have been executed on a selected document until now in chronological order. For example, this is information on the creation and modification date or the creation of a new version.

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 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 ECM-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 in different storage systems.

Performance features:

- Enterprise content management for all applications
- Directly saving and opening documents with standard application commands
- Enhanced Windows Find-functions by windream-specific document retrieval
- Low introductory and follow-up cost with a minimum of administration and training efforts
- No expensive integrations and adjustments to existing and future applications

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.
- **Via schedules 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 ECM again with the corresponding command. Documents can also be checked-out and checked-in recursively in one process. In addition to this, it is also possible to undo a previous check-out process.

Business Edition (BE)

The windream Business Edition mainly concentrates on the demands of enterprises.

Unlimited number of users and groups. The BE-version can be used as a performant product variant in enterprises which – among other demands – want to support an unlimited number of windream users and groups in a complex environment. The group assignment of all users is based on the existing user administration of the operating system.

Extended rights concept. Access rights on documents can be assigned to single users and groups. windream BE allows an access administration down to the level of a single document. Further on, rights can be assigned for documents and properties and for folders and documents separately. The extended rights concept also offers rights on editing object types, dropdown lists, context menus, attributes and ObjectStores.

Individual context menus. The context menus of the clients are configurable individually on the server side. In contrast to the SBE-/SBX-versions, the (in)visible context menu commands depend on the rights, which are assigned by administrators.

Subscribing documents and folders. Users can subscribe documents and folders and select individual objects to keep themselves informed on specific changes automatically. Users are notified via e-mail. This way, it is e.g. possible to keep specific windream users and groups continuously informed on the current status of certain objects, e.g. if documents or the associated rights have been changed. Even a change of the rights will be logged, and a respective e-mail notification will be sent to the users involved in the process.

Several tab pages. The windream Business Edition allows users to distribute index fields of archived documents on several tab pages, if required. This option is interesting in case that quite complex index information shall be assigned to documents. Additionally, this option also offers a much better survey on all ECM-specific document attributes.

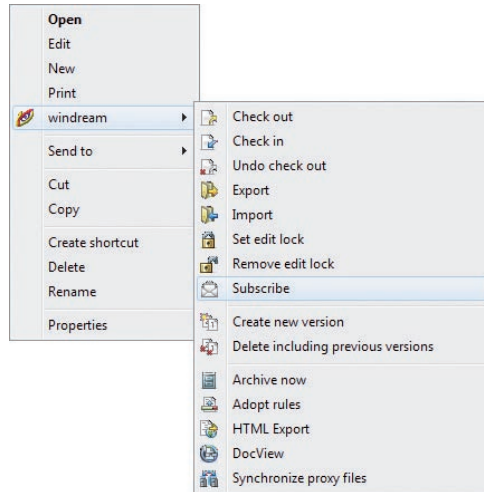
SBE, SBX and BE – joint functions. Specific windream functions are available in all three product variants. Besides the additional tab pages presenting the file properties, these are the enhanced Explorer context menu and the windream Management Console for efficient system administration.

Data exchange. Documents can be exported via the commands of the windream context 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.

Setting edit locks on documents. If a user sets an edit lock on documents, the document will be locked against editing by other users, until the files are unlocked again. In contrast to the described check-in/check-out function, the documents will be edited in the ECM-system directly and not as a local copy.



Context menu. The windream context menu includes ECM-specific functions with which the operations listed below can be executed.



windream context menu

The commands are valid for all documents selected in the Explorer view:

- Create a new version;
- Delete documents including previous versions;
- Check-out, check-in and undo check-out processes on documents and folders including index data in HTML or XML format (SBX and BE only);
- Import and export of several documents in one process;
- Document lock and unlock;
- 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);
- Subscriptions (BE only).



The integrated reporting function logs all events which have been executed with the context menu in a separate logfile.

windream Management Console (WMC). The windream Management Console offers efficient methods for administering the system settings and the object types of the ECM-system. 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 to this, 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 you 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.

The windream Management Extension (WMX). With the windream Management Extension tool, file operations can be executed directly from the integrated ECM-browser. This option allows users to access objects in the ECM-system directly from the WMC.

Further on, current data of a windream environment can be monitored and checked in the WMX. Thus, the Windows-specific system monitoring program has been extended by windream-specific functions, via which the current status of a windream system can be analysed, e.g. the number of currently connected workstations, or the number of open and occupied database connections.



Performance features

Capturing functions.

- Storing documents in the ECM using the „Save as“ menu command of all Windows programs;
- Administration of any filetype;
- Importing documents via drag and drop;
- Importing available data.

Indexing functions.

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

Archiving functions.

- Archiving in the filing structure of the Server;
- Lifecycle management with definition of editing and archiving periods;
- Support of all common storage systems (optional);
- Flexible archive concept;
- Mirrored archive servers for data protection;
- Intelligent, hierarchic storage management;
- Certificates on completeness of documents and the complete archive (optional);
- Transaction: secure data transmission with consistency check.

Retrieval functions.

- Search via Windows Start menu;
- Reusable queries on the basis of saved search 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.

Editing 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.

Administrative functions.

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

Advanced functions.

- Script implementation by using the Windows Scripting Host;
- Supported interfaces/standards: ActiveX Controls, COM/DCOM, OLE-DB/ADO, XML, HTML.

Security functions.

- High data security;
- Revision secure archiving;
- Access protection by assigning flexible access rights;
- Windows login used as windream login;
- Supporting the single sign-on concept.





Rely on the Technological Market Leader

If you plan to invest in an innovative, efficient and easy to handle ECM-system, or if you need further information on how to optimise your business processes concretely, we should get to know each other.

In the market sector of ECM-software suppliers, windream GmbH is the technologically leading manufacturer. With the windream ECM-system based on the patented Virtual File System technology (VFS), we have created an unrivaled tool for administering your complete company knowledge. Our software is easy to handle, effective, and future-proof. We have 20 years experience in successful software solutions development for enterprises of any size. Medium-sized companies and multinational corporations as well rely on our top quality products and on our technological know-how.

Look and see!



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