

# windream Exchange



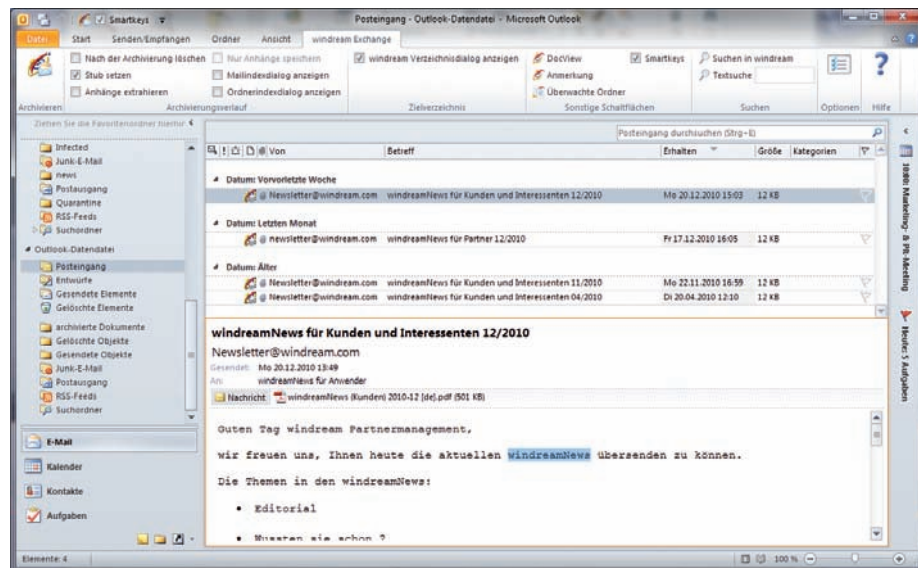
**E-mail archiving  
for Microsoft Outlook  
and Exchange Server**



# E-mail archiving for Microsoft Outlook and Exchange Server

The steadily growing volume of electronic messages requires an efficient information management. With windream Exchange, a modern and powerful windream software solution is available to windream users which allows an automatised and manual archiving of mails stored on Microsoft Exchange Server. The system archives all message texts and the associated attachments as well. On the client side, the objects to be archived are moved from Microsoft Outlook to windream by the Exchange Server. This process follows individually definable rules which can be created quickly and comfortably with the help of an editor.

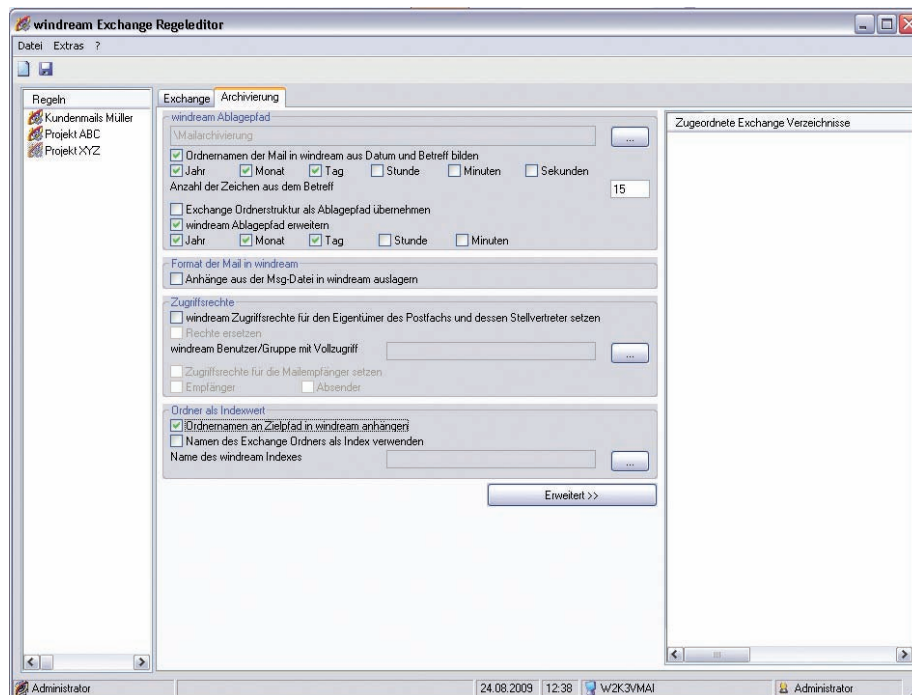
**For automatised archiving,** Exchange Server mailboxes and public folders are connected to selected destination folders of the windream server.



Integration of windream Exchange into Microsoft Outlook

**Individual and global definition.** Users can connect any Exchange folder, meaning mailboxes which they can access according to their personal Microsoft Outlook profile, to any windream folder.

Additionally, they can determine whether the messages shall be archived recursively, which means to include all subfolders of an Exchange folder. A requirement for archiving mails in windream is always that a user has been equipped with the respective access rights on the windream folders involved in the process.



windream Exchange Rules Editor

With filters, e.g. size and date of the messages, users can specify the objects to be archived from a mailbox. Specific Exchange folders of user-specific mailboxes are connected to any windream folder as the destination folder.

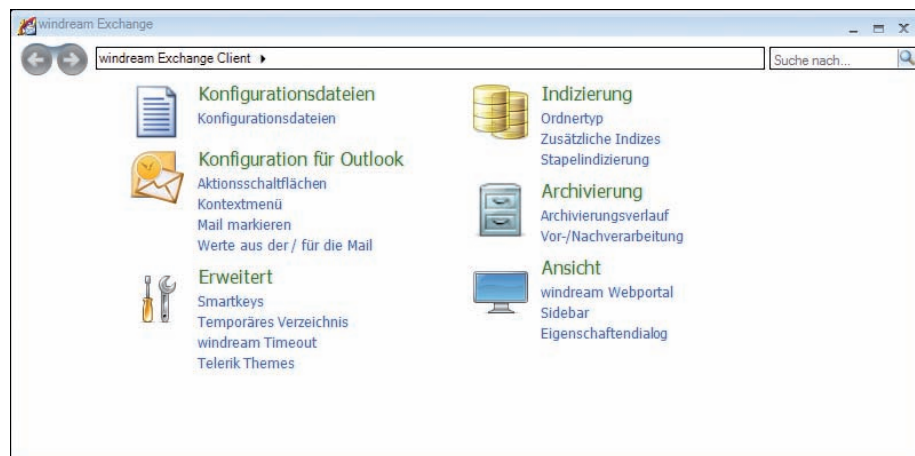
windream Exchange will create separate directories with the user names in the destination folder automatically. The objects of the user-specific mailboxes are stored in these directories.

**Manual archiving.** The installation of the windream Exchange client components allows windream Exchange and Outlook users to archive objects manually, too. In this context, users can e.g. assign document and folder types to the messages, or they can determine the target directory in windream.



Additionally, a manual archiving process also allows a simultaneous indexing of the Outlook objects. Selected e-mails of a mailbox or all objects of a selected Outlook folder can be archived manually.

**Storage...** windream Exchange creates folders for the e-mail objects in windream. The windream destination directories are defined and configured during the determination of the archiving jobs. Information like e.g. sender, recipient, date or subject of a message is used by the system for indexing the folders. The e-mail text and the attachments are stored as files in these folders. The files can be assigned to document types and index values like any other windream document.



**Configuration of the windream Exchange client**

**...and access.** After having stored the objects in windream, users will access them via the Outlook e-mail application as usual. Further on, the objects are also accessible via windream. Whilst the messages are deleted from Microsoft Exchange Server after they have been archived, windream Exchange generates respective references of the messages stored in windream on the Exchange Server.

These links are visible as Outlook objects in the mailboxes of the Microsoft Outlook e-mail client. A double click on the link of an e-mail will open the message stored in windream. It can then be edited with the Outlook functions in the same way as other Outlook e-mail objects which have not been archived. An icon indicates that a message has already been archived in windream. Messages stored in windream can be indexed, edited, archived, retrieved or deleted like any other document.

The messages and their file properties like indices, history, rights, version, life-cycle and fulltext can be viewed and edited. The properties are accessed via the Windows Explorer or via the result list after a conducted retrieval process.

**Convenient E-Mail Retrieval.** Of course windream Exchange offers elaborate functions for retrieving archived mails quickly and efficiently – also in extensive mail archives. For this purpose, windream Exchange generally uses the find function of the windream ECM-system which is also used for retrieving other documents. The search for e-mails, however, can be adjusted specifically for windream Exchange.

Thus, the solution not only offers the familiar windream text search, requiring only a single search term, but also the option of opening the windream research application directly from the Outlook interface. The user is then offered all windream-specific research functions.

**Configuring Search Profiles.** Furthermore, a search can also be conducted via so-called search profiles. For this purpose, search criteria relevant for the retrieval of specific mails in the windream e-mail archive can be defined once and saved in corresponding profiles. In the options of the windream Exchange mail archiving solution, you can then always select the pre-configured search profiles and execute them, whenever required.

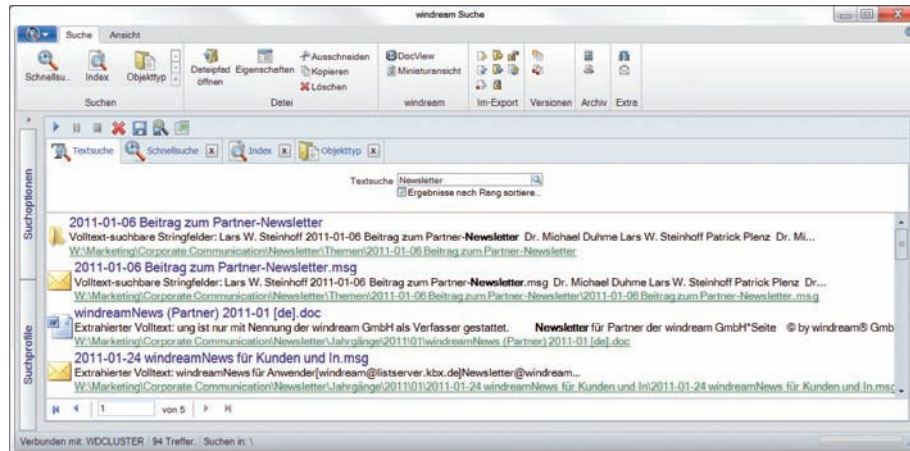
**Individual Configuration.** Via the easily configurable search options, users can define individual search operations in order to retrieve specific mails quickly and conveniently, even in very large e-mail archives.

Once configured, a profile can be executed repeatedly without requiring a re-entry of the search terms, since these are permanently saved in the system. These options also enable users to limit a search to specific paths or folders of the windream ECM-system in which the mails are archived.

### Performance features:

- Convenient administration of e-mails in Microsoft Outlook and in windream
- Efficient processing and quick retrieval with the windream-specific ECM-functions
- Automatic AND manual message archiving
- Easy configuration with rules assistant
- Substantial Exchange Server release

Profiles and pre-defined search inquiries can even be linked to hotkeys on a workstation computer. This way, complex search operations can be executed by pressing a single key. The results of a search are – as usually in windream – displayed in a clearly arranged result list.



Result list of a windream search via windream Exchange

**Individual rights administration.** The access rights on Exchange objects in windream and on the windream folders in which the Exchange objects are stored are administered via the windream rights administration. This way, you can ensure that the messages are only accessible by authorised users. Unauthorised access is impossible.

**Conclusion: Convenient and easy.** windream Exchange offers all windream users a decisive profit in administering their electronic messages. Another decisive fact is the release of the mail server. Further on, the complex but easy to use windream ECM-functions are to be

considered, with which messages cannot only be edited and administered more efficiently on the Exchange Server. Targeted retrieval operations are very easy to manage with windream Exchange, too. Finally, windream also allows users to store e-mails in a fraud-proof way, which fulfills the current legal regulations completely.





## **windream Exchange – List of Features**

### **windream Exchange Server**

- Effective solution for rule-based e-mail archiving for Microsoft Exchange
- Archiving mailboxes or e-mails from mailbox folders
- Optional archiving of e-mails from PST files
- Definition of rules by administrator, or alternatively by user
- Execution as service or as scheduled task
- Support of Exchange Journaling function
- Optional post-indexing and -editing

### **windream Exchange Client**

- Efficient solution for manual archiving of e-mails for Microsoft Outlook
- Extensive tools for configuration
- E-mail archiving from selected mailbox folders
- Optional module for pre- and post-processing with automatic target folder assignment and batch indexing
- Monitoring of pre-defined Outlook folders and automatic archiving of new elements
- Optional post-indexing and -editing
- Access to archived e-mails via the windream Client as well as via the windream Share Drive (without installation of windream Client)

### **windream Exchange Server and Client – common traits**

- Immediate archiving and later modification of e-mails in Exchange including the removal of mail bodies and attachments (“stubbing“)
- Automatic indexing according to specific e-mail properties
- Definition and application of individual user access rights
- Optional post-indexing and -editing



## 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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# Managing Documents