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—Martin Stewart, Director of Strategy

Axe Group Chops Document Generation Costs with Windward

The Background

This case study illustrates how one of Australia’s premier insurance solutions providers experienced significant and measurable time and cost savings after switching from an inflexible and complicated open source document generation solution to a more powerful, cost-effective docgen component.

The Company

Award-winning Australian insurance solutions provider Axe Group develops and sells the Axelerator Insurance Platform, an Adaptive Straight-Through Processing (STP) system for automation of new business, claims and lifecycle services. Axelerator provides a rules-driven environment for one-touch and personalized process execution, with smart handling of exceptions.

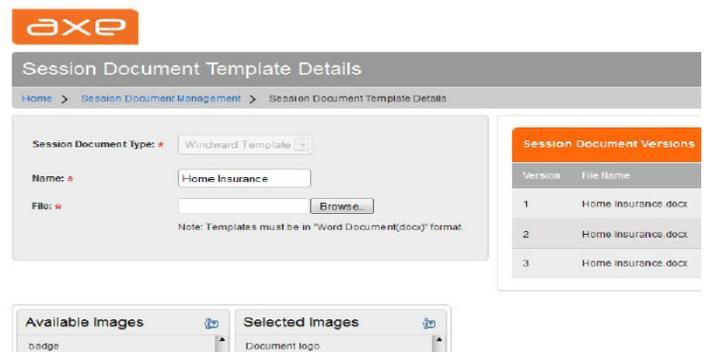
The Challenge

Document generation is an integral part of Axe Group’s Axelerator platform. Axelerator relies on its docgen component to generate session-specific documents, such as quotations, letters and applications.

Prior to using Windward Studios, Axelerator used the iText scripting language for creating document templates—but the software was less than ideal. A major drawback was the time-consuming document

creation and revision process. Developers would change the code, see how the template looked, go in and change the code again, review the template again, and so on, until they finalized the template.

Even so, the final result was not perfect. Martin Stewart, Axe Group’s Director of Strategy, termed the scripting tool “fiddly” because it was difficult to get the layouts of the documents right. In addition, the software extended project cycle times, required intensive IT support, and was expensive to maintain.



The Solution

Axe Group assigned someone internally to investigate options and came up with a short list of three programs, which the company downloaded and evaluated on a trial basis. Selection criteria included functionality, usability and pricing.

Axe Group chose the Windward reporting and document generation solution. This solution is composed of Windward AutoTag and the Windward Engine, which work together as a cohesive docgen platform. AutoTag is a Microsoft® Office add-in that automates datasource mapping, database connection and report design. The Engine, available for Java and .NET, delivers data as fast as any enterprise system can handle.

Axe Group selected the Windward solution for five primary reasons:

- 1. Flexibility.** With Windward, template designers can easily lay out a document to look exactly the way the creator wants. Flexible template design means less time spent tweaking output. It also means that Axe Group can include report writing in its own applications without any outside branding.

“When we design a form for a client, we can quickly give them exactly what they’re looking for,” Stewart said. “And this has helped significantly with pre-sales as well. We can easily insert a potential customer’s logo into our documents, and it makes us look good.”

- 2. Ease of Use.** One of the biggest expenses in the report creation process correlates to the design tool’s ease-of-use. Because Windward users design reports in Microsoft Word, Excel® or PowerPoint® —programs most professionals already know how to use— there’s a shorter learning curve.

“Windward gives us the ability for any non-technical person to update forms and the flexibility for our customers to create and change document templates themselves without needing IT involvement,” Stewart said. “With the integration with Axelerator, this means that new or changed documents can then easily and quickly be tested and deployed to production.”

About Axe Group

Axe Group is a fresh-thinking software company with numerous prestigious awards, including the IBM International Beacon Award for an insurance industry solution, MIS Innovation Awards for excellence in the use of technology in insurance, an AIIA Award recognizing innovative solutions, and Finalist, 2009 NSW Telstra Business Awards in Medium Business and Innovation categories.

- 3. Versatility.** Windward allows Axelerator to create sophisticated documents, such as those used by many of Axe Group’s clients. For instance, a subsidiary of a large bank is able to utilize a single template that covers multiple rulesets because the templates are flexible enough to take in many variables.

Plus, Windward enables users to output documents in a wide variety of formats: HTML, PDF, DOCX, XLSX, PPTX and more. Axe Group’s prior solution was restricted to creating PDF documents, and with Windward the company outputs to Word, Excel or PDF, depending upon the customer’s needs.

- 4. Embedding capabilities.** Windward integrates with just a few lines of code, and the architecture and standards-based APIs make implementing the solution easy. This eliminates the need for outside consulting services and allows developers to focus on the core application.

“A really important feature of Windward for us is that we can embed the tool into our standalone mobile version of Axelerator,” Stewart said. “This is a key benefit because it means that our users do not have to be connected to the server to be able to utilize the reporting features of our product.”

5. Affordable and adaptable licensing models. Licensing costs for Windward typically are less expensive than for comparable document generation solutions, and the license includes accessible technical support and detailed documentation.

Because Axe Group incorporates Windward into Axelerator, the company does not pass additional license fees on to clients. Plus, Windward exists on multiple work stations and test sites without separate licenses.

The Achievements

Time savings

- **New document creation time savings of a factor of 10 or more.** An Axe Group business analyst can add a new document in roughly an hour or less. With the previous tool, iText, that process took between one and two full days.
- **Project cycles shortened from years to weeks.** In a recent 6-week project, one employee created and added revisions to approximately 40 documents. Stewart estimated this would have taken several person years with iText.
- **Prospect demos done rapidly on site,** with template modifications taking place in 10 minutes. This was impossible with Axe Group's previous solution.

Cost savings

Along with the time savings that translate directly to cost savings, Axe Group has seen other impacts on its own and its customers' bottom lines.

About Windward

For businesses in document-intensive industries, Windward Studios is the document generation and reporting software company that empowers business professionals to create beautiful, professional reports. Create custom reports with Microsoft Office as your design tool and a Java or .NET engine that connects to virtually any data source. Windward has been delighting customers since 2004.

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Streamlined processes

Axe Group can now set up the initial templates and then enable clients to perform any layout tweaks. This takes what Stewart called "a major headache" out of the projects and substantially reduces both costs for Axe Group clients and last minute changes for Axe Group project teams to cope with.

New and more satisfied customers

Windward has helped Axe Group attract new customers and keep them happy. For instance, a major customer decided to build a correspondence engine based around Windward, replacing a previously outsourced setup.

"Windward saved us and the client a fortune as there were a lot of changes to all the documents after the initial templates were signed off," Stewart said. "We never would have met the time constraints—and we would have blown the budgets—had we used the previous tools."

Add Reporting and Document Generation to Your Software Application

[Download a free trial of Windward's products](#) or [request a live demonstration](#).