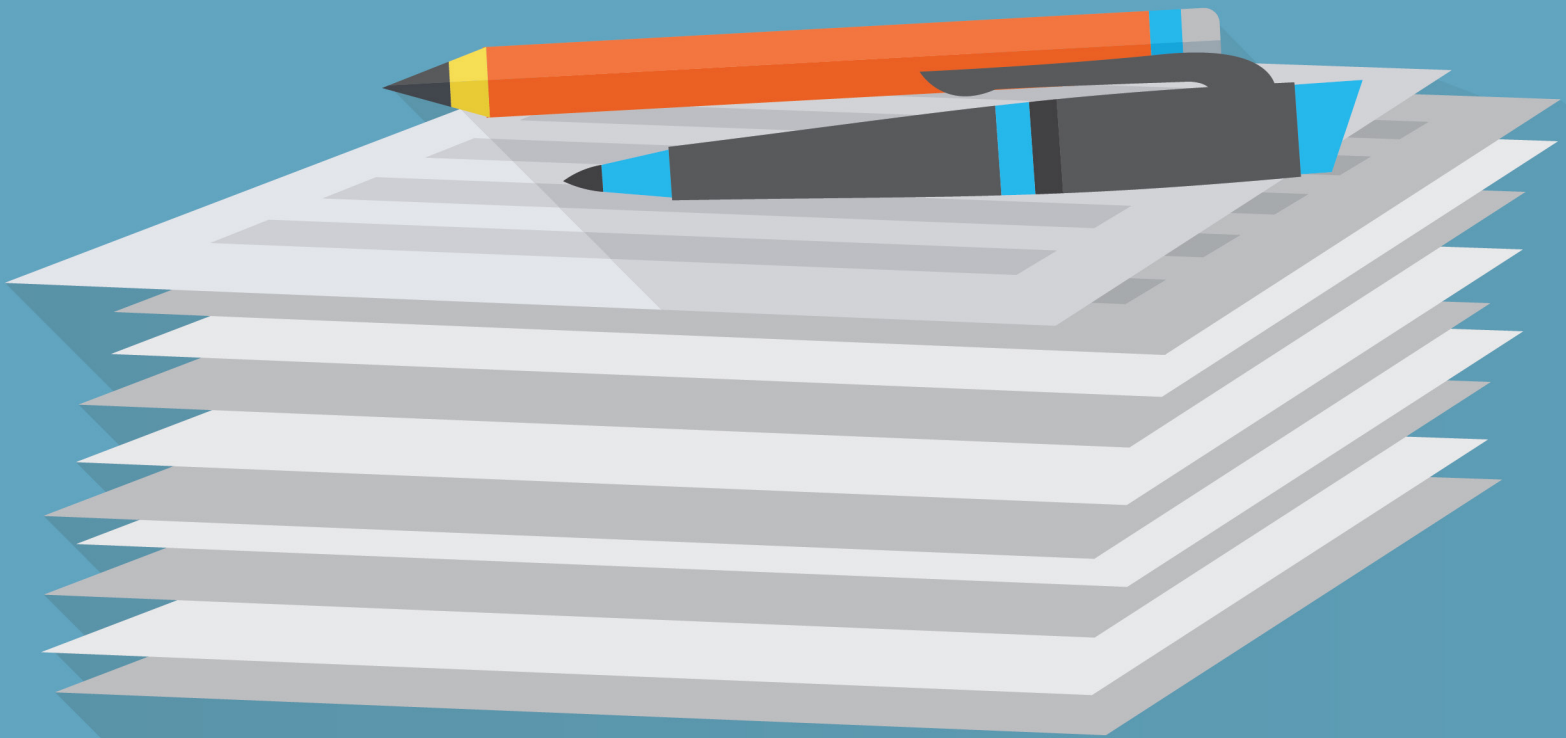


How to Do Document Generation The Right Way



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WINDWARD

If document design were to take place in a more flexible tool, companies would shrink the employee software learning curve and reduce the costliest piece of the docgen process.

What Exactly is Document Generation?

Picture any of the documents a bank or other financial institution sends out, such as monthly statements, loan documents, account portfolios and more.

While each individual document has customer-specific information, as a whole *they contain significant amounts of information in common*. The company has created a single template into which they import different sets of data and then automatically generate the output. This form of production, which can result in thousands of nearly identical but ultimately unique copies, is what we call document generation.

Document generation, also known as docgen, is the most thorough and efficient way to automate document production.

Why You Need Great Document Generation

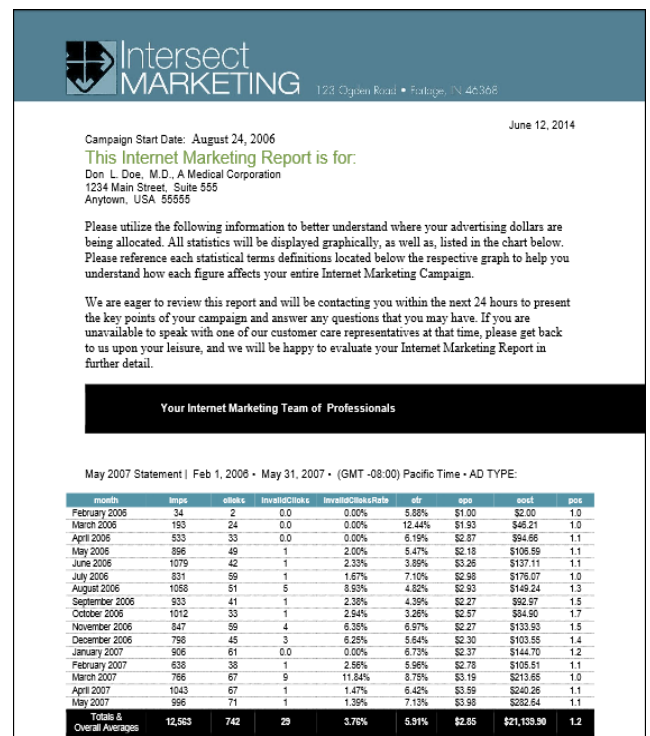
Great document generation saves time and money by allowing your customers or end users to efficiently create and update document templates without taxing developers.

A few of the benefits:

- **Saves time.** The processes of importing, designing, modifying and generating documents are fast individually and as a whole.
- **Frees up resources.** Developers are expensive. When you free your developers from the mundane tasks inherent in a sub-par document generation system, you free up valuable resources.
- **Leads to happier customers.** Your customers deserve documentation that is easy-to-read and well-organized.

Why Document Generation Goes Astray

For many docgen software programs, the document designer is the developer, not the business user. The docgen process goes something like this:



Intersect MARKETING 123 Ogden Road • Raleigh, NC 40368

June 12, 2014

Campaign Start Date: August 24, 2006

This Internet Marketing Report is for:
 Don L. Doe, M.D., A Medical Corporation
 1234 Main Street, Suite 555
 Anytown, USA 55555

Please utilize the following information to better understand where your advertising dollars are being allocated. All statistics will be displayed graphically, as well as, listed in the chart below. Please reference each statistical terms definitions located below the respective graph to help you understand how each figure affects your entire Internet Marketing Campaign.

We are eager to review this report and will be contacting you within the next 24 hours to present the key points of your campaign and answer any questions that you may have. If you are unavailable to speak with one of our customer care representatives at that time, please get back to us upon your leisure, and we will be happy to evaluate your Internet Marketing Report in further detail.

Your Internet Marketing Team of Professionals

May 2007 Statement | Feb 1, 2006 • May 31, 2007 • (GMT-08:00) Pacific Time • AD TYPE:

month	imps	clicks	invalidClicks	invalidClicksRate	ctr	spo	cost	pos
February 2006	34	2	0.0	0.00%	5.88%	\$1.00	\$2.00	1.0
March 2006	193	24	0.0	0.00%	12.44%	\$1.93	\$45.21	1.0
April 2006	533	33	0.0	0.00%	6.19%	\$2.37	\$94.66	1.1
May 2006	366	49	1	2.00%	5.47%	\$2.15	\$106.59	1.1
June 2006	1079	42	1	2.33%	3.89%	\$3.26	\$137.11	1.1
July 2006	831	59	1	1.67%	7.10%	\$2.98	\$176.07	1.0
August 2006	1088	51	5	8.50%	4.62%	\$2.93	\$149.24	1.3
September 2006	933	41	1	2.36%	4.29%	\$2.27	\$92.97	1.5
October 2006	1012	33	1	2.94%	3.26%	\$2.57	\$84.90	1.7
November 2006	847	59	4	6.35%	6.97%	\$2.27	\$133.93	1.5
December 2006	798	45	3	6.25%	5.64%	\$2.30	\$103.55	1.4
January 2007	906	61	0.0	0.00%	6.73%	\$2.37	\$144.70	1.2
February 2007	636	38	1	2.56%	5.98%	\$2.78	\$105.51	1.1
March 2007	766	67	9	11.84%	8.75%	\$3.15	\$213.65	1.0
April 2007	1043	67	1	1.47%	6.42%	\$3.59	\$240.26	1.1
May 2007	996	71	1	1.39%	7.13%	\$3.98	\$232.64	1.1
Totals & Overall Averages	12,563	742	29	3.76%	5.91%	\$2.85	\$21,189.90	1.2

Save time and money when you use document generation to produce common form letters and statements.

The developer lays out the original template with code and tags. He sends it to the business user. When the business user needs a revision, she sends the request to the developer. The developer stops what he is doing (valuable coding work) and adjusts the template. He sends it back to the business user for review. Case closed? Not if the template needs further tweaks and has to go back to the developer.

And therein lies the crux of the problem: the seemingly endless back and forth between programmer and end user in order to achieve the desired output. It's a cumbersome cycle that needlessly wastes time and energy, and you more often end up running short on time and settling for an inferior output.

You can apply the same logic to documents generated from software products. If the end user cannot revise the document without the need for a developer or an update patch from the software company, you end up with frustrated customers and an overwhelmed support staff.

How to Bring DocGen “Back to the Fold”

We at Windward have talked with thousands of companies, and they tell us that the most critical component of a docgen system is the template design interface. If document design took place in a flexible, familiar and easy-to-use tool, documents would look exactly as intended. The result: **companies would shrink the employee software learning curve and reduce the costliest piece of the docgen process.**

You can find document generation of that type in Microsoft® Word. We think Word as an interface frees docgen to be the best it can, and here's why.

Word Offers Flexible Formatting

Word is a straightforward program that business users already know, so you can design and edit templates without large-scale IT involvement.

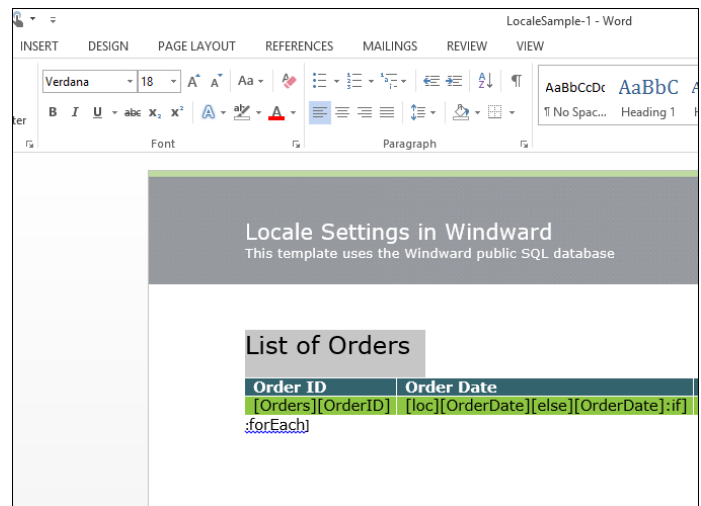
At its core, Word is an intuitive interface. The ribbon displays logical groups of commands and features, and drop-down galleries quickly get you to the tools you need. The output is highly customizable, and you can lay out elements so they appear exactly where you want in the document.

Users Experience a Small Learning Curve

Document generation integrated into Microsoft Word requires virtually no learning curve to get started—which significantly increases the speed at which projects get completed. And because any business user can quickly become a master of document generation, developers are no longer needed to build documents.

Word Has Widespread System Compatibility

Some existing Word-based docgen programs work with a wide range of databases and other data sources and can be integrated into systems based on Java, .NET and other programming languages. You don't have to spend



Microsoft Word is an intuitive docgen interface.

time putting data into other formats or invest in new equipment or developer training.

Your Customers Save Money

When you take developers out of the equation, your customers or business users are now the document designers. They are able to create documents quickly and efficiently, thereby slashing the overall cost of document design.

Your Next Step

Do you find yourself caught in a cycle of seemingly endless iterations when designing documents, and could you benefit from a Word-based docgen tool? That's why we created the Windward solution.

At Windward, we believe that document generation should be simple and that free-form template design is a must. You deserve attractive, informative and impressive documents.

Windward provides a unique experience using Microsoft Office to format and edit report templates. Behind the scenes, Windward's sophisticated engine pulls data from multiple sources and merges that data into your reports, creating a fast and hassle-free experience that can make generating reports fun.

Windward delivers a solution that allows IT professionals to create basic templates and business users to customize those templates and create variations to meet their document generation needs. For details about the technology and how it has been successfully deployed in docgen, please visit the [Windward Studios website for an overview video and free trial.](#)

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.

Windward OEM and enterprise customers span over 70 countries and all industries, including financial services, insurance, energy, healthcare, HR and technology. We've been delighting customers since 2004.

Our primary products are AutoTag, a design tool that creates custom templates with Microsoft Office, and a Java or .NET engine that connects to virtually any data source.

Windward delivers exceptional support, training, and documentation, with a 98% satisfaction rating from our customers. We're a Microsoft Gold Partner and an Oracle Gold Partner.

Do Document Generation the *Right Way!*

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