



Upgrading to Windward From HotDocs

Saving Time & Money



Create Templates in MS Word

- Windward supports template creation in Word, Excel, & PowerPoint



Benefits

- Adding new functionality, like drag & drop
 - Saving you time. A lot of time.
 - Making the design process pleasant



Big Wins

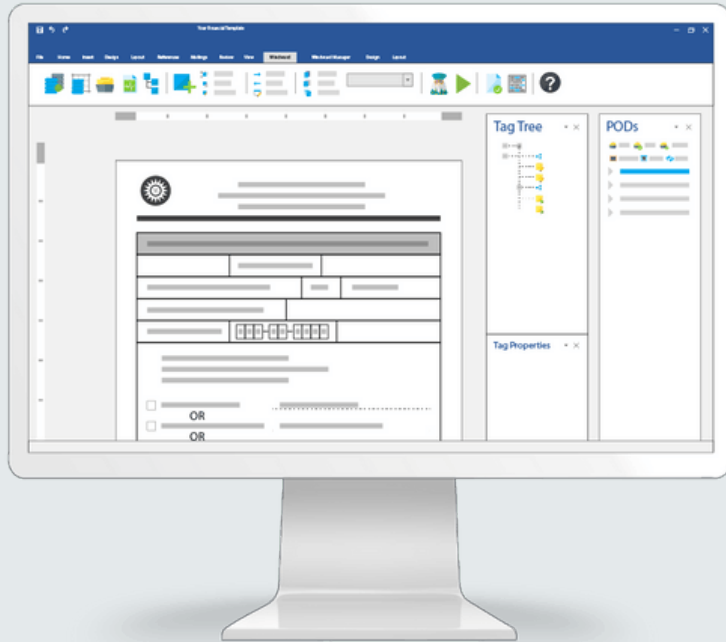
- Forms – use Microsoft Power Platform instead
- The Windward Designer

Forms from Power Platform

- Windward uses Microsoft Power Platform for forms.
 - An industry standard that many already know how to use
 - An incredibly easy-to-use form builder
- You do not gain (or lose) any significant features or functionality.
- Your win is using an industry standard
- And designing forms will be faster & easier

The Windward Designer

Microsoft Office Add-in

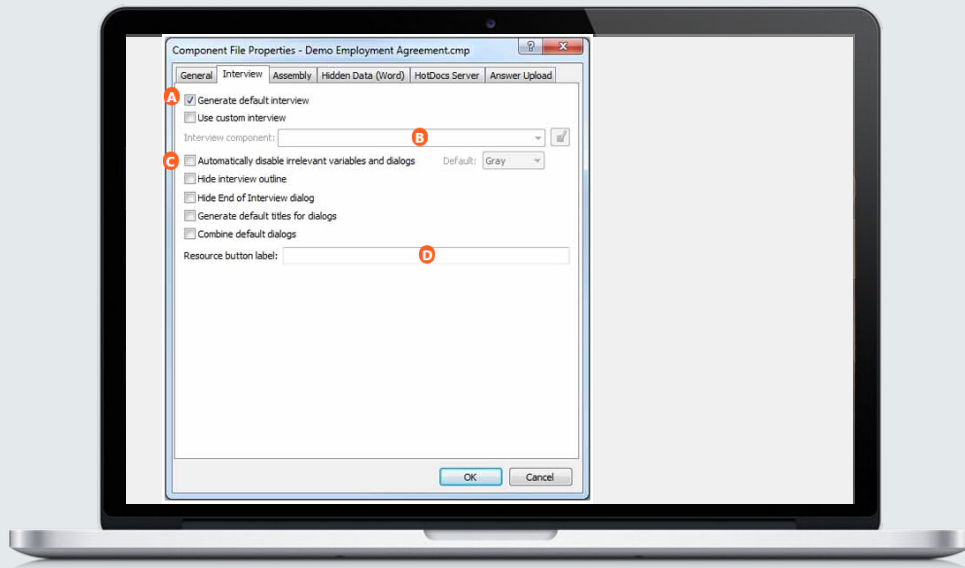


Windward is built around an add-in to help you place & edit the fields (tags in Windward nomenclature) in the template.

The Windward Designer makes adding and revising tags a breeze because it works on the tag in the template. And while helping to write each tag, it can do so in the context of where the tag is in the template.

You can, from the designer, access any object in any datasource, to use in the template. And as the designer provides it, you no longer need to memorize or copy all the mapped fields.

Eliminating Data source Components



- Eliminate the concept of datasource components.
- Everything is in the template including the queries to the datasources.
- Eliminates the need to have DBAs involved in template design.
- No more going to the components each time you need another field.

Drag & Drop Doclets

One (or several) users can create content for a template that are saved off. Then they or other users can drag those saved doclets to drop onto a template. This provides template designers a way to create very complex templates easily by dragging the needed components. It also eliminates repetitive tasks. (In Windward, these are called PODs.)

- Any part of a template you can select can be saved as a POD
- When dropping a POD, the full style & formatting is inserted
- PODs can easily be shared among users
- PODs can include tags of any complexity

Query Wizards

- Your most common activity creating templates is writing the queries to select the data.
- With query wizards, business users can write the query to pull data.
- Distinct wizards for: JSON, Odata, Salesforce, SQL, & XML.
- User selects data in the moment – that's gigantic
- No errors due to typos
- Easy to find/get the data you want
- Arguably more important, the designer understands the data and then uses it appropriately.

Document Automation

- This is all provided by Windward's integration with Power Platform:
Scheduling
 - Triggering (data routing) document generation from datasource activity
 - Routing generated packages
 - Forms (interviews) to collect data
- With Power Platform you gain:
 - Using Microsoft's industry standard
 - Can connect Windward to other applications to make document automation part of larger processes

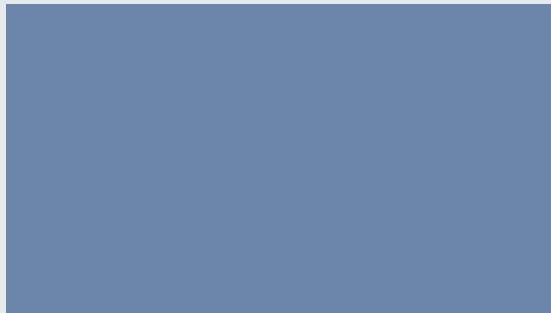
What Goes Away

Datasource Components

Everything is in the template



Writing Fields by Hand



HotDocs Only Features



They understand the legal field very well



You can go from form to template without storing the form values in a datasource

- This is a bad idea in our opinion

Windward Only Features



PODs – drag & drop doclets



Charts (from data)

- No 3rd party web designer
- Built around native Word charts



Query data directly in the template

- From multiple datasources



Output to over 20 file formats

- Including direct to printers



Imported child templates

- Headers & footers optionally included
- Child styles & format merged



Formulas

- Including standard & custom macros



Access Providers

- Import files using any protocol



Document Locking

- Carries Word & Excel locking to output



Process Embedded Office Objects

- Process tags in embedded OpenXML objects

Reasons to NOT UPGRADE

- Your HotDocs system is running fine
 - No new templates to create
 - No templates to revise



Reasons to UPGRADE

- You need faster turn-around
- You want to empower business users to fully design templates
- You need to access multiple datasources in a template
- You need the advanced features Windward provides
- You need to reduce time programmers spend on templates
- You need to eliminate mapping changes when documents need additional data, or you want to eliminate mapping altogether



Steps to Upgrade

Convert your HotDoc templates to DOCX, XLSX, or PPTX

- Run Windward's template convertor.
- Address any issues the convertor lists.

Step 1

Step 2

Map the template to the datasource in Windward Hub



Alternative

Run Windward & HotDocs Side by Side

- **Use Windward for:**
 - All new templates
 - Templates requiring substantial editing
 - Templates that need Windward only features
- **Keep HotDocs for:**
 - All existing templates that are fine as-is



Thank You

Questions?

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Resources

[Windward Studios website](#)

[A Guide to Evaluating DocGen Products](#)

[3rd Party Reviews of Windward vs. HotDocs](#)

Next Step

Download & evaluate [the Windward Trial](#)