



Upgrading to Windward From Nintex

Saving Time & Money



Create Templates in MS Word

- You still create your templates in MS Word
- Windward also supports template creation in Excel and Powerpoint



Benefits

- Selecting fields becomes trivial
- No defining data relationships – it's just there
- Adding new functionality, like drag & drop
 - Saving you time. A lot of time.
- Making the design process pleasant

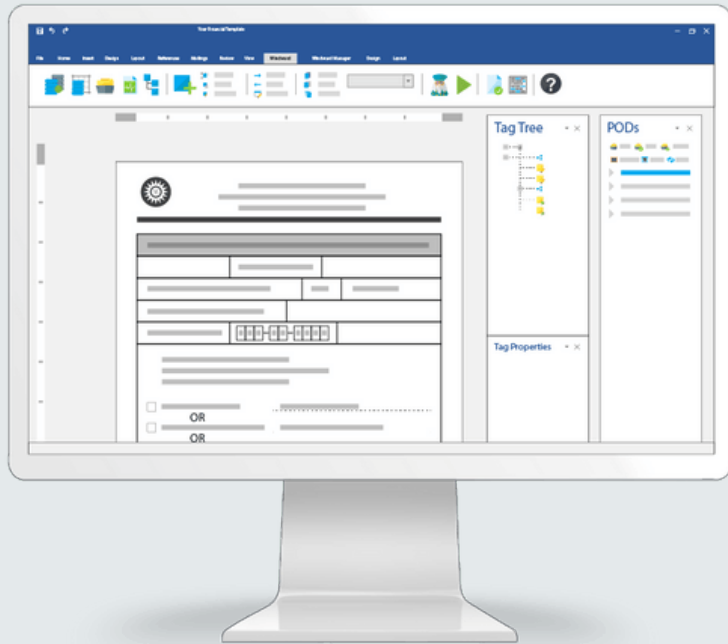


Big Wins

- The Windward Designer
 - Easily specify any field
 - No need to define data relationships
 - Drag & Drop Doclets
 - Query Wizards
- Powerful field tagging

The Windward Designer

Microsoft Office Add-in



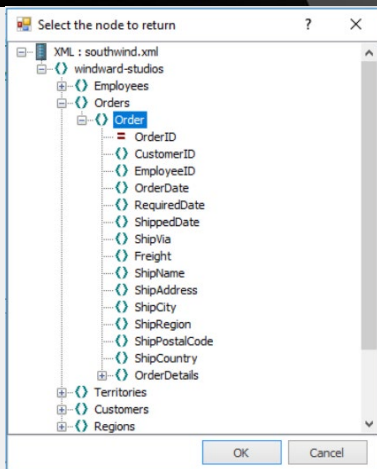
Windward is built around an add-in to help you place & edit the fields (tags in Windward nomenclature) in the template.

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 no longer have to search & copy field names from your browser.

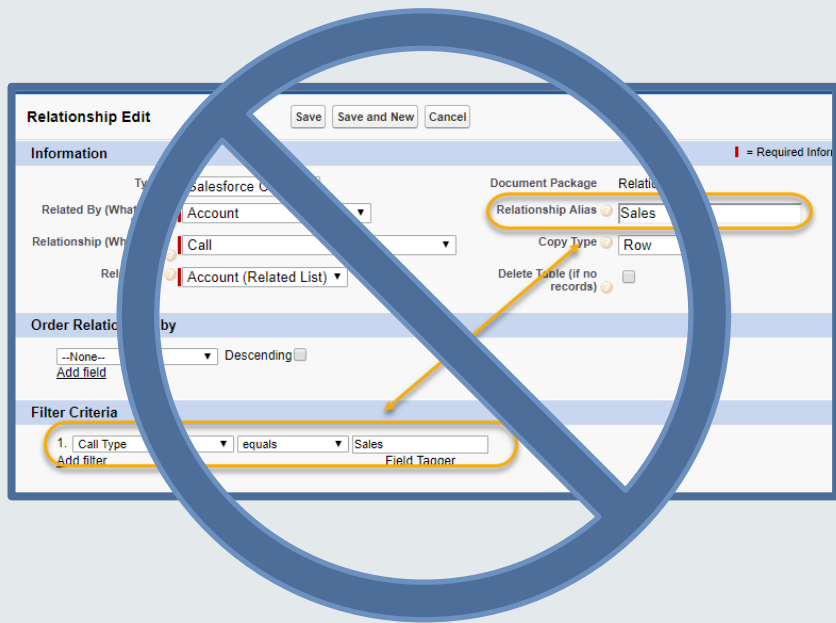
Control tags can be hidden or revealed immediately with a click.

Easily Select Any Field



- Select the field you desire right in Office
- Structured in a tree to make it easy to find any field
- And inline search for further help
- Format date & number fields using Excel patterns

Eliminating Data Relationships



- Eliminate the concept of mapping fields
- Everything is in the template including the query to the datasources
- Eliminates the need to have DBAs creating relationships.
- No more going to the data relationships each time you need another field.

Drag and Drop Doclets

AKA “PODs”

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
- The POD is linked so any change to the POD is immediately reflected in the template and in any generated documents.
- 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 more errors due to typos.
- Easy to find/get the data you want - MORE IMPORTANTLY the Designer understands the data and then uses it appropriately.

Powerful Field Functionality

- Place repeat (iteration) and conditional (if) tags around any content.
- Charts do not require a backing worksheet of data
- Tags support a powerful evaluation syntax (similar to Excel)
- Over 50 macros and you can add your own custom macros
- Display numbers & dates using Excel patterns (like “mm-dd-yyyy”)
- Importing pictures is just specifying the field
- Imported child templates are live – their fields are processed

Document Automation

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

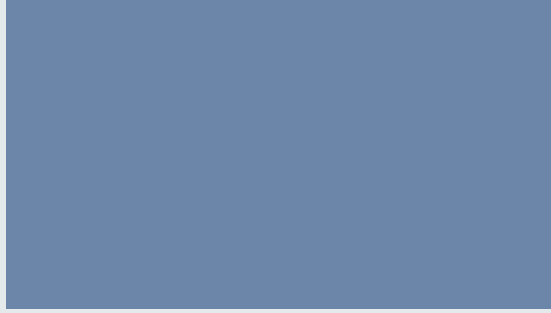
What Goes Away

Defining data relationships

Everything is in the template



Writing fields by hand



Nintex Only Features



Fillable PDFs

- Windward requires templates in DOCX (along with XLSX & PPTX).



Hawkeye



Use Web and/or Mac versions of Office for templates

Windward Only Features



PODs – drag & drop doclets



Query data directly in the template

- From multiple datasources



Output to over 20 file formats

- Including direct to printers



Imported child templates

- And the tags in them are processed



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 Nintex system is running fine
- No new templates to create
- No templates to revise
- You need PDF templates



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 to reduce time programmers spend on reports
- You need to eliminate code changes when documents need additional data (or you just want to eliminate data relationships all together)



Steps to Upgrade

Convert your Nintex templates to
DOCX, XLSX or PPTX

- Run Windward's template convertor.
- Address any issues the convertor lists.
(note: converter in alpha, contact Windward for details)

Step 1

Step 2

Run the converted templates

Pricing

	Windward Hub (10 users)	Nintex (10 users)
Monthly	\$600.00	\$600.00
Yearly	\$6,120.00	\$7,200.00

Windward

- Hub (Document Automation Solution)
- Java Engine
- .NET Engine
- RESTful Engine
- SAAS (coming soon)

Nintex

- Document Automation Solution



Alternative

Run Windward & Nintex Side by Side

- **Use Windward for:**
 - All new templates
 - Templates requiring substantial editing
 - Templates that need Windward only features
- **Keep Nintex 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. Nintex](#)

Next Step

Download & evaluate [the Windward Trial](#)