



Upgrading to Windward From Xpertdoc

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

- Adding New Functionality
- Saving You Time. A Lot of Time
- Making the Design Process Pleasant

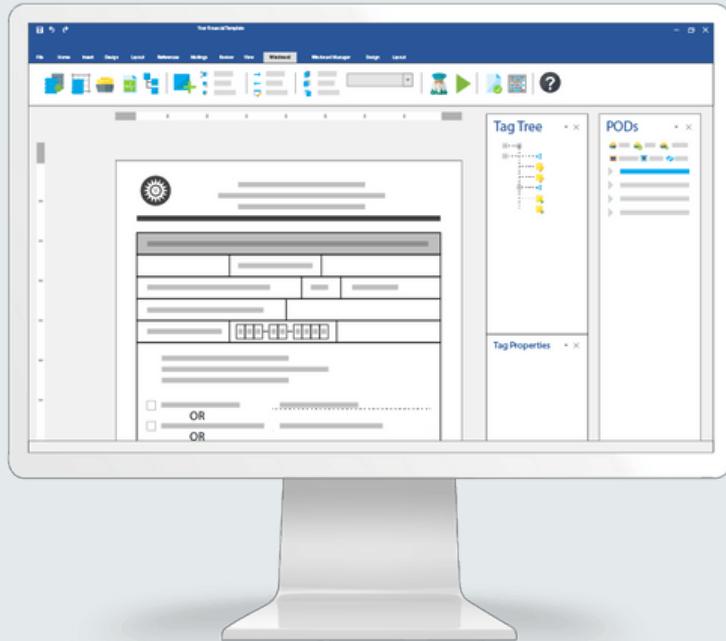


Big Wins

- The Windward Designer
- Live Template Components
 - Query Wizards

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 filed names from your browser.

Live Template Components

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
- When that saved component is updated, all templates using it are immediately updated

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.

Xpertdoc Only Features

NONE

Windward Only Features



Access Providers

- Import files using any protocol



Document Locking

- Carries Word & Excel locking to output

Reasons to NOT UPGRADE

- Your Xpertdoc system is running fine
 - No new templates to create
 - No templates to revise
- You only pull data from Dynamics
 - And you don't need live components



Reasons to UPGRADE

- You need to access multiple datasources in a template
- You need live components



Steps to Upgrade

Convert your Xpertdoc templates to DOCX

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

Step 1

Step 2

Run the converted template in Windward using the XML file

Alternative

Run Windward & Xpertdoc Side by Side

- Run Windward & Xpertdoc side by side
- Use Windward for
 - All new templates
 - Templates requiring substantial editing
 - Templates that need other datasources
 - Templates built around live components
- Keep Xpertdoc 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. Xpertdoc](#)

Next Step

Download & evaluate [the Windward Trial](#)