

# Spotlight on Reviews of Windward Studios

# 2018

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Based on real user experiences



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# Real User Reviews of Windward Studios



We Use It To Write All Our Package Reports, And We Allow Clients To Make Their Own Custom Reports With It.

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## Primary Use Case

We are a software company. We put out a payroll and personnel software package. We use it to write all our package reports, and we allow our clients to make their own custom reports with it, as well.

## Improvements to My Organization

This is a tough question, because we are a software vendor, and we use it as an add-on to our software to write the reports for it. It's improved our software, but it hasn't really improved our company.

Of course, we use our own software to do our own HR and payroll, but we don't use Windward to do financial reports. We use whatever is in the financial software that we use.

## Valuable Features

The fact that it uses Microsoft Word and Microsoft Excel as base templates, so when you generate, it's easy for clients to upgrade, and maintain, and generate out either a PDF or an actual Excel spreadsheet.

The ability for users to have design and layout control is very important. If clients or my developers can't lay out things into specific spots, we couldn't produce reports that look like forms. We have to produce things that look like check stubs or that look like W2s, or of different government reports requiring a specific form layout.

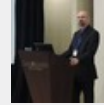
## Room for Improvement

It is a very good product. It does everything we need it to do. The only thing I can think of, that we'd like it to do, would be the ability to "burst out" reports, meaning one section of a report could be sent out as an email to a manager of a department, say, without having to run multiple reports to do it. As it sits now, we have to do multiple reports to do it.

## Use of Solution

More than five years.

## ABOUT THE REVIEWER



**Jim A.**

SVP, Product Development and Quality Assurance at a tech vendor with 11-50 employees

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## Stability Issues

It is software, so there are always times where things don't work. Most of the time issues happen when trying to move to a new version. There might be problems with reports that were created in an older version, so either we have to make a tweak to the templates or we report it to them and get them to make an adjustment to their software.

For the most part, it's been quite stable for all the different releases we've been on.

## Scalability Issues

We haven't encountered scalability issues with their product directly. With the way we implemented it, we've had some issues, so we're looking at trying to change it to more their standard way of implementing it, which should work better. We've had problems with the way we implemented it, and tied it in to our software, using that custom data source I mentioned.

## Customer Service and Technical Support

They've been very good. They're very prompt and fast. We've been using it for quite a while now, so at times, I've even talked to the president or the CEO, whenever we've needed to get an extra boost, because we've needed something a little more quickly. But their support has been awesome.

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## Previous Solutions

We used to use Oracle Reports before this. We had gotten word that Oracle was phasing it out, plus it was something that you really had to be technical to use, and you had to have their tool to make any changes. It was a challenge at times, so we looked for a new solution.

Before that, we were on a tool called Speedware. I've been here for a long, long time through several generations of software. Technology changes. You have to move to new tools that keep up with the software that you're using.

## Initial Setup

The way we've implemented it, for our clients, it's basically plug and play. They plug it in and they run the reports through our software, and away they go.

For somebody to make reports or modify reports, there's a plug-in called AutoTag, that goes into Microsoft Word and Excel. It's somewhat on the technical side, so somebody that doesn't understand database structures might not be able to use it very well. It helps to have a little training, but they offer a lot of free training sessions, which helps.

## Pricing, Setup Cost and Licensing

This is tough to say, because we have a contract with them, where we we sell it for use with our application only, in a package bundle. We're reselling it to our clients, so I can't really comment on what they might sell to somebody that was going to use it in-house. We negotiated our prices many years ago, and while they go up a little bit here and there, they've been pretty steady.

## Other Solutions Considered

Because it was seven or eight years ago, I don't remember a lot of what we looked at. I do remember we looked at Crystal Reports, but we looked at somewhere between a half dozen and a dozen different options before paring it down and going with Windward. If you compare something like Windward to something like Crystal Reports, Windward is cheap. Crystal Reports is outrageously priced.

## Other Advice

We have developed somewhere around 600 - 700 base product reports that we ship, and then custom reports for our clients. They're all over the ballpark, for printing off W2s in the US, T4s in Canada, clients' check stubs, general ledger reports, time sheets; any types of payroll and personnel-type reports.

The main data source we use for most of our reports is a custom one. They have the ability to hook in your own data source, written in Java. We have a custom data source that runs through our apps, or our app serves up the data for the reports. We also do some that are XML format, some that go directly to the Oracle Database to query up the data.

What we were looking for was, a report has got to come out pretty fast, but it all depends on the amount of data, the amount of pages it is. You can't have a report take 10 minutes to produce one page of data. A 1,000-page report might take 10 minutes to formulate all the data and produce the report.

In this day and age, there are so many different tools out there. It really doesn't make sense to create your own package, when you can easily plug in a third-party. Our strength is not in producing software that's going to produce reports. Our strength is in creating a product that does human resources or payroll functionality. It made more sense to add on a third-party tool for doing the reports, and then we just create the reports, and not try to have to deal with the software level underneath.

I would advise others not to go the route we did, with the custom data source. It makes it a challenge, when you do have a problem, because you're trying to isolate where the problem is. Is it in our software? Is it in the handover of the data to their software, or is it in the report template? Using their base, standard type of deployment and usage is the better way to go.

It's great. It's a good product. For a relatively technical person, it's relatively easy to use. It works in Word and it works in Excel. There may be easier to use products out there, but typically, something that's easier to use isn't as powerful. There is always that trade-off.

*Disclosure: IT Central Station contacted the reviewer to collect the review and to validate authenticity. The reviewer was referred by the vendor, but the review is not subject to editing or approval by the vendor.*



## Best Feature Is The Template Designer Within Windward Autotag.

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### Improvements to My Organization

Previously we were running reports from SQL Queries and formatting the outputs in Powerpoint Presentations, Word Documents or Excel Spreadsheets. Due to large growth, our reporting needs both externally and internally were taking too much time from the Management Information team to run on a daily basis.

Since the installation of Autotag, users are now able to run reports either for their business area or for their external clients with the MI team assisting on creating the templates. This has delivered huge time savings across the business allowing more time to focus on development and growth opportunities.

### Valuable Features

The template designer is by far the best feature within Windward Autotag. You build the reports in the Microsoft Applications that you already know, and simply add tags which draw the data in where you need it. The learning curve is very low due to this and also serves as a great way to introduce our junior members to SQL queries.

### Room for Improvement

As Autotag constantly upgrades it does more post processing on the documents. It is still lightning fast for most reporting needs, however for some of the more complex reporting we have noticed a small slow down over previous versions.

#### ABOUT THE REVIEWER



**Joe R.**

Junior Data Systems Analyst  
at a recruiting/HR firm  
with 51-200 employees

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### Use of Solution

Three to five years.

### Customer Service and Technical Support

Customer Service:

The customer service at Windward is absolutely top notch. Every time I've had a query they have always responded promptly and in a friendly yet professional manner.

Technical Support:

The technical support team is one of the best technical support teams I have ever dealt with. I can keep track of the status of my technical query at any time by logging into their site. They respond very promptly and they really work hard to break through any technical issue.

*Disclosure: I am a real user, and this review is based on my own experience and opinions.*



## Allows Me To Generate Complex Reports Directly Inside Word Or Excel.

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### Primary Use Case

Report generation.

### Improvements to My Organization

It's tough to give you an example of how it's improved things, because I really wasn't doing anything of this nature prior to implementing the solution. So it's hard for me to give you an example of that. I can say that, in implementing this solution, I was able to meet and exceed the project goals I had towards the deliverable, and what that deliverable would look like.

### Valuable Features

The two features that I like the best are the ability to generate Word and Excel documents, and the ability to create my templates directly inside those software sets.

It's absolutely critical for me as a user to have design and layout control, because all of my reports are very, very customized. I have to have control over the ability to generate and to control what they look like.

### Room for Improvement

There are some - and they've made some positive changes to this already - but there is always room for improvement in the speed, especially with the complex, multi-line Excel spreadsheets. They made some improvements in the last version that are quantum-fold faster than when I first started. But there is always room for improvement there. You always want reports faster and faster. Everybody wants instantaneous reports, doesn't want have to wait. Anything that can be done to speed that up would be an enhancement, for me.

The other thing that I have requested that would be nice, there are some Excel formatting things that you lose when you implement a template: some default Excel validation scripts, macros. You could create them in Excel if you were just using Excel, but in creating a template that generates a report, some of those validation things are lost. You just don't have the ability to create them before they are spit out. That would be a nice enhancement to see.

### ABOUT THE REVIEWER



**Mike B.**

Co-Owner at a tech company

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### Use of Solution

One to three years.

### Stability Issues

I have not noticed any stability issues. It's a very stable platform, once you get your template built.

Now, in learning to build the templates, you will experience some learning curves, learning what works and what doesn't, and how you have to, like in any software, implement things. But once you have a stable template built, it's extremely stable.

### Scalability Issues

Since I've only been implementing it for a year, we haven't pushed it to its limits yet. I'll probably know more next year, and in the years to come, how scalable it is.

It seems as though it's going to be completely scalable for me, at this point. It doesn't seem like I'm going to hit a limitation for resources or anything like that. But again, this might be a hard thing for me to answer since we only implemented a year ago. I implemented it as a pilot last year for a new project, to prove that it was possible to do. It was very successful. And now it's starting to be scaled this year a little bit further. In the years to come, we'll continue to scale it further and further. It is possible I could hit some scaling thresholds it won't scale past. But at this point I'm not aware of them.

## Customer Service and Technical Support

I have used tech support on a number of occasions. I haven't done any official training on the product, I just use their Wiki page and send questions to support as I need them. I would always have an answer within 24 hours. It's not always the answers you want but, like all support, it's the answer you get.

## Previous Solutions

The only report generation I had done prior to this, was creating our own HTML reports. It was very time consuming and tedious. I wanted to find a software set that would allow me to generate Excel and Word reports that would look the way I wanted them to look. I am a non-programmer, so I needed a software set that would allow me, as a non-technical programmer, to be able to accomplish that.

I did evaluate building a custom solution, but the cost of producing reports of this complexity, and building it myself from scratch, would have taken me three to possibly even 10 times the amount of time it took me to create these templates. And instead of creating them myself, I would have had to employ developer resources to create them. The cost would have been quantum-fold more than what we've invested in the Windward solution.

## Initial Setup

It was extremely straightforward. It's pretty much out-of-the-box. If you can use Excel or Word you can figure out how to create Windward template.

There is a learning curve, as with all things with complex pieces, when you want to get a lot more detailed. But we, with no official training, have been able to create some what I feel are pretty robust reports.

## Pricing, Setup Cost and Licensing

For what you're getting, it's an extremely good value.

I implemented, I believe they call it a single-core license. It's working just fine for me. I can see where, at some point, I'm going to want to upgrade and invest in a multi-core license, because I want to expand this into other product offerings, because it does such a good job.

## Other Solutions Considered

This is my first foray into reporting software. I did evaluate Crystal Reports, and some other well known reporting software. It just seemed to me that Windward would be easier. And I loved the idea of being able to generate templates myself in the programs that I wanted to have as the ultimate reporting tool, like Word and Excel. That was the selling point to me. I hadn't used any in the past, so I had nothing to compare it to. That was my decision-maker, that's why I went with Windward.

## Other Advice

At this point we really only have four or five different templates. We're generating documents through a Web portal. There are lots of documents being created but they're all being created off of four or five different templates. But the templates we've created are pretty complex. We're generating directly from a Web-hosted SQL database.

If you like to play with software and learn it for yourself, you would be just fine doing as I did, and going through the Wiki pages. But if you have immediate project needs, I could see that consulting and training would be extremely useful for it. It took me, probably, three or four months to get my reports where I really wanted them, and learn all the nuances of the software. But I like to play with software and I wanted to learn it that way. That was a choice I made.

That would be my only advice: To evaluate whether you may want additional training and consulting services to go with the purchase.

I don't think I will ever give anybody a 10 out of 10 because there are always slight areas for improvement. But I think that their product does exactly what they say it will. They deliver what they say so there is not a lot that they can do to improve.

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