The Complete Guide to Document Generation for Non-Developers

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This paper aims to enlighten you about the process of easy document generation with the help of Windward's easy-to-use automated document generation application software. We include a step-by-step guide for non-developers to easily produce templates and documents.

No body enjoys the task of manually generating documents. There are so many other productive tasks you could be doing other than spending time repeating the same documentation-related task over and over again. However, there is no avoiding the fact that organizations need important documents and they need these documetns to be up-to-date. In fact, employees spend nearly 50% of their time creating and formatting templates and companies waste nearly $20,000 annually dealing with document issues.

In addition, businesses also experience over 20% productivity loss while handling documents. A lot of processes are involved in generating documents and the different teams involved may not be aware of what goes on at the different stages of development. Even the most competent developers are not aware of the important compliance rules from the business side of things, and vice versa. It is important, though, that there is information available for both developers, business users, and anyone that makes use of document generation applications.
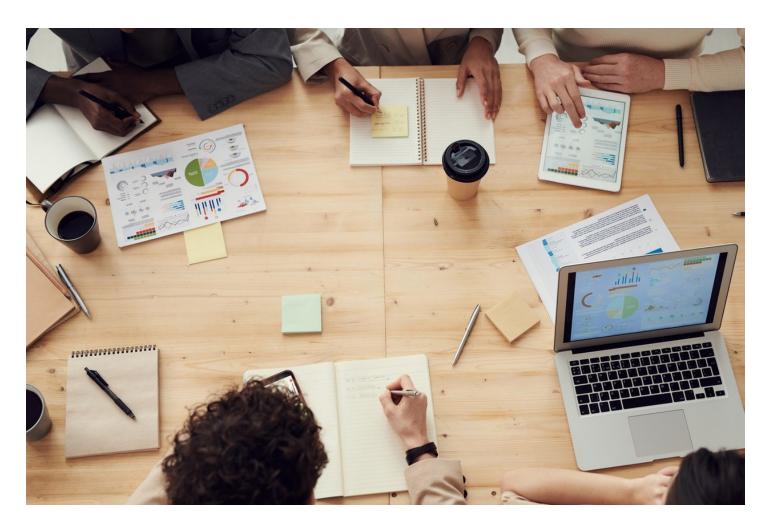
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Old Docs, New Tricks!

Unlike other applications that may need extra plug-ins, Windward allows you to create no-code templates within Microsoft Word, a program that most computer users are familiar with. Even a person with basic computer knowledge would be able to utilize Windward's software without the need to learn how to use a brand new application that may limit design options. Moreover, you can ensure massive time savings with document automation.

Such simplicity makes it possible for people of various skill levels to collaborate in the creation and editing of templates.

Windward's unique document generation efficiency is made possible by the following features:

- User-friendly functionality enables even non-developers to create and utilize templates.
- Use familiar workflow software for document creation.
- Create templates using the same powerful features you're used to, like text formatting and style.
- Template fields are easy to understand and require no coding experience.
- Simplified document creation makes output fast compared to having to manually code a template.

The process of generating documents is as simple as 1, 2, 3 with the best document generation software:

1.Create or resuse a template

2.Generate the document

3.Deliver the document

Let us now take a detailed look at each of these steps for document generation. As promised, this is a guide for non-developers so the instructions will be simple and easy to follow.

Step 1: Template Creation

Basically, creating the template is the most essential part of automating document. The template is the blueprint for the document that you will be generating. With Windward, you can design and format the template using Word and the powerful engine will take care of the rest.

To get started, let's say you want to create a form that you will be giving a number of clients to fill out.

Choose to either open a blank document or open a form template. If you choose a blank document, you will have to start from scratch and add all the content on your own from the data source. As a non-developer, it will be easier to opt for a form template. Regarding the source of a template, you can choose an online template or even templates stored in a database that is connected to your system.

Creating a template has never been this easy. The software's utilization of popular Microsoft Office tools hastens the process of coming up with templates. It is as if you are just using the same tools you have already been using for years. There is also the ability to insert tags in the content. For more assistance, Windward includes a tag wizard that simplifies complex queries so that non-developers can use and understand the processes.

Add Content
Once the template opens, you can then add content to it. The content may include boxes to be ticked, questions to be answered, as well as images and drop-down options. You can simply tag the data you want to be displayed in the template and save it for future use.

The design of the template can be altered in any way you see fit, or you can stick to what is provided. With Windward, there is also a drag and drop option so you can choose a field from another template that you think would be appropriate for the one you are creating, then drag that field and drop it onto the template.
With the drag-and-drop feature in the Windward's data wizard, a non-developer can incorporate a template from a different source and make use of it as a sub-template. This means you do not even have to create a template from scratch, just borrow it from an existing source.

Think of the amount of time saved when creating a new template that is urgently needed for business operations. In just a few minutes the template will be ready and the document generated shortly after. Document creation can flow like clockwork without a second lost.

A big roadblock for non-developers as they try to create templates is the need for coding when using certain tools. There is a need for engagement of developers to create many pages of code to come up with the required template that is able to perform the tasks that the user wants them to. That means the developers also need to spend a lot of back and forth time trying to understand the needs of the user before they can come up with the final code for the template. The amount of time taken doing this is extremely unbearable. This also does not include the time it will take to fix minor errors even after the template has been created.

Create Instructions

There is also the option to create instructions. There was a time when this would require special coding to be written, but now, you simply choose the instructions for the template and they will be automatically be applied.

Restrict Permission

When the template is complete, you can then restrict editing. This will determine how much can be changed on the template once you have closed the permission. There are different permission restrictions and you can change them later if the need arises.

Store the Template
After you're done creating the template, you can store it in a library for future use along with other templates for creating various documentation.

Step 2: Generate the Document

Generating the document is simply about you giving the output command with specific instructions like data source and the output destination. Windward will do the rest. The software will merge the chosen template with your data and automatically generate the document with the data already filled out.

At this stage, it is still possible to make a few changes to the template, depending on the permissions that were specified when the template was created. The generation process is mostly automatic and the program will follow the instructions given to generate the document. It is as easy as accessing a document in a Word folder and then choosing what to do with it.

Step 3: Deliver the Document Hot Off the Press

Based on your specifications in step two, the system will deliver the document in the required output format to the mentioned recipients. You can even schedule email delivery to single or multiple recipients.

The interface will give you different options and you can choose the appropriate action to be taken. This is a process that can be completed in just a few minutes and sometimes even less than a minute. You can get documents in a wide range of formats including DOCX, PPTX, PDF, XLSX, HTML, Postscript and more.

You must be wondering why Windward? Well, the following benefits can explain why are the best choice for document generation software.

Advantages of Document Generation with Windward

Using Microsoft Word as the Windward's Interface: As previously stated, Windward works as an add-in to Microsoft Office: Word, Excel, and PowerPoint. The fusion of MS Office with Windward gives the software impressive abilities. This is made possible because of the following reasons.

Word Provides Dynamic Formatting: Many non-developers are already familiar with the different capabilities of Word so they are able to use it to create and edit templates even without involving the tech personnel. It is easy to find your way around Word when designing templates with user-friendly abilities to create templates fast customized to your needs.

Master Windward Easily: The learning curve from first-timer to expert is almost non-existent! With Windward integrated into your favorite applications like Word and Excel, it takes less time to become an expert at document creation. The developers can concentrate on more technical things instead of being involved in creating templates. Projects, therefore, get completed in record time as even non-developers get involved.

Assured Quality All the Time: With the beautifully designed templates, you can reuse them as many times as you wish and that ensures quality every time. You can also edit them to suit a current need for improvement. You can also add other features like digital signatures.

Implement Flawless Data Integration: It is just a matter of choosing your data sources and they will be integrated into the system without a hitch. You also have the option of using the wizard which allows you to drag and drop relevant information.

Attractive Designs at Your Fingertips: There are a lot of options when it comes to font styles, graphics, colors and so much more while creating documents. You have the potential to create documents that will attract, impress, and convince. This doesn't have to take long and neither do you need expert-level graphic skills.

Developer-Free Document Generation: You no longer need to depend on a developer or tech support to get quality documents generated. In fact, you don't have to know about programming or coding. Windward frees you up by providing an automated process that still guarantees quality and eliminates human error. Even the delivery process can be automated.

Document Generation is Made Cheaper: By cutting out the need for developers to write code for template design, a big chunk of money is saved. This presents an efficient way of generating documents without spending a lot on the process.

Better Organized Delivery: For organizations that have large amounts of documents to deliver, the system will organize them into batches and deliver each to the right recipients without delay or errors. That way the right people get the right report at the right time.

Resources Will be Saved: Unlike manual generation and other software, this one will save not just time, but money too. What would have taken as long as a month to create, can now be done in a few hours or even minutes and without the help of developers. The resources saved can be put to use in other areas.

What more can you ask for? It should be on your to-do list this New Year — introduce Windward into your existing applications and create top quality documents in quick time.