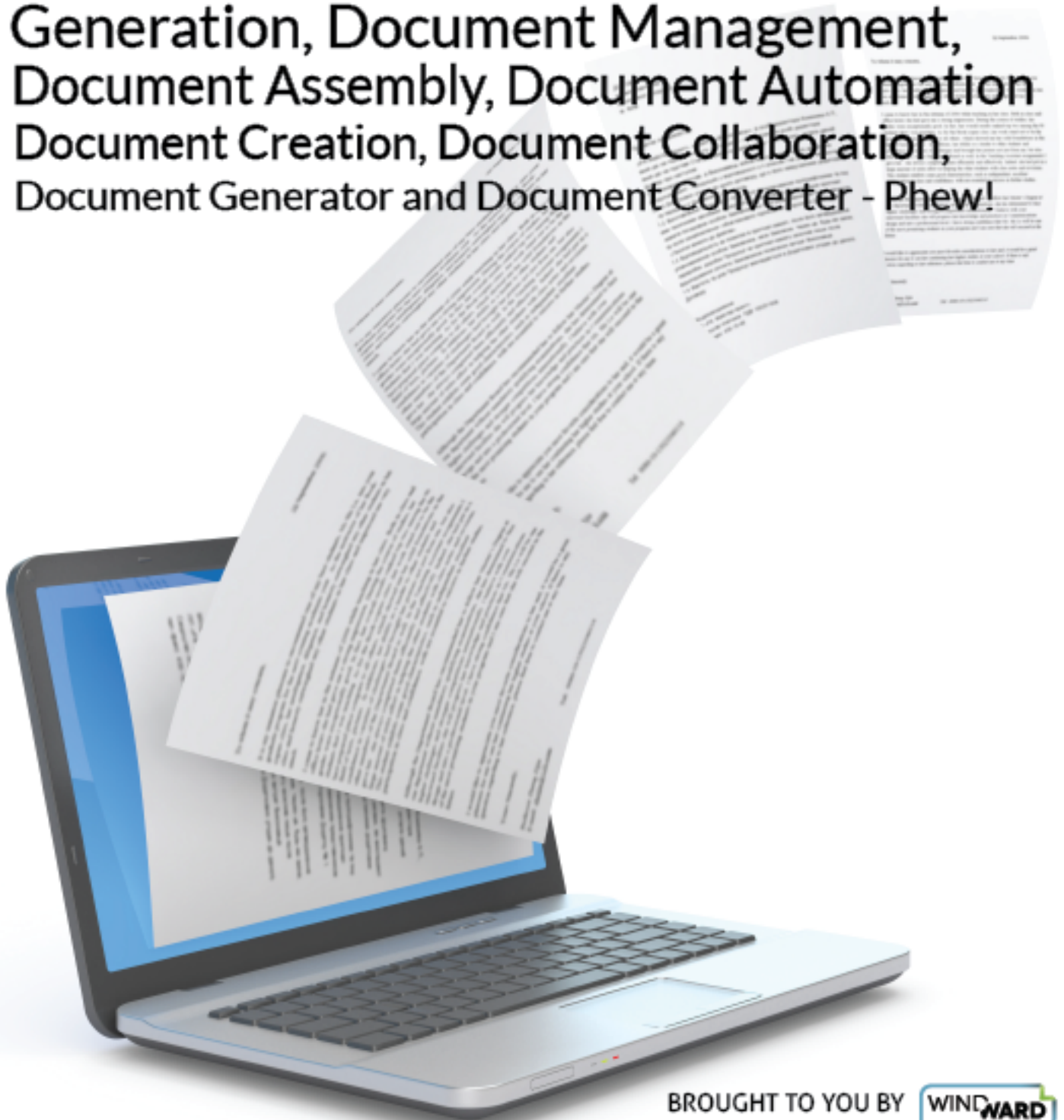


What's Up, Doc?

The Definitive Guide To Document Generation, Document Management, Document Assembly, Document Automation, Document Creation, Document Collaboration, Document Generator and Document Converter - Phew!



BROUGHT TO YOU BY



“The most important piece of a business document system is the **document generation software because you can’t manage, convert or collaborate on a document unless you’ve created it in the first place.”**



You need an automated solution for your documents, but it’s tough to know where to start. Should you be looking for a document generation solution? Document creation software? A document management system? Document collaboration tools?

Unfortunately, there hasn’t been an easy answer—until now.

This white paper addresses all the above questions and more. It breaks down what each term means, shows you how they’re related, and introduces you to some key software programs and vendors in each arena.

The Skinny on “Document (Fill in the Blank).”

Document generation

Suppose you create policies, statements, employment letters, and other types of documents for your insurance company, bank, law firm, health care agency, government agency, etc. Into these documents you need to place information, which can take the form of items such as dates, contact information, and boilerplate paragraphs of text. And all this information is stored in a database or other data source such as an Excel spreadsheet.

In this situation you’re looking for a document generation solution. Document generation is an automated way of producing documents and reports and is extremely useful for businesses that create embedded software. You create

a template and specific information from the data source populates the template when the document is generated.

Document generation is also referred to as document creation, document automation, and mail merge. There's also document assembly, which is just one part of this process—the actual merging of the data with the template.

Document generator/ documentation generator

A similar term causes a great deal of confusion when searching for “document generation” software online. The terms documentation generator and document generator often appear in search results when you type “document generation,” and while the words are similar, the concepts are not.

A documentation generator is a programming tool that generates software documentation intended for programmers (API documentation) or end users (end user guides), or both. A document generator has a very narrow use case; it's for when you create software and need documentation about your software applications to show users how they work.

Document management

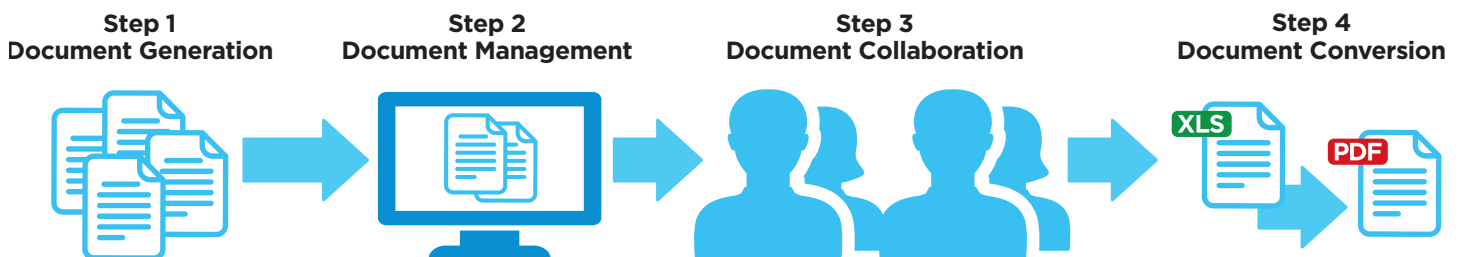
Let's say your organization has thousands of documents, and you need a system to track, store, organize and otherwise manage them.

This is where document management comes in. A document management system stores and organizes digital documents. It often includes features like workflow and metadata (which may show the date the document was stored and the identity of the user.) So, for example, where you might use document generation software to create your insurance policies, you would store those policies in and access them from a document management system.

Document collaboration

Document collaboration software does just what the name implies; it allows more than one person to work on (i.e. edit) a particular document. Typically document collaboration systems include built-in version control, a process that lets users check in and check out documents. This ensures that two people aren't unknowingly editing a document simultaneously, and it also allows users to retrieve earlier versions.

The Path of a Business Document



The path of a document in a business document system might resemble that as above.

Document collaboration can be a feature of a document generation system, but not all document generation systems allow for document collaboration.

Document converter

Lastly, suppose you have a file in one format, such as Microsoft Word (.DOCX), that must be in a different format, such as a PDF. In this case you would use a document converter, which is software that automatically converts from one file format to another. Document converters do not actually create documents; instead, they allow you to modify already existing documents.

How Document Systems Work Together

The most important piece of a business document system is the document generation software, because you can't manage, collaborate on or convert a document unless you've created it in the first place. This is why document generation is the heart of all the systems covered here.

In addition, multiple individuals may work together to create the document (document collaboration), but collaboration obviously is not required to create and generate a document. Some document generation solutions have features that allow for collaboration (such as solutions that use the Microsoft Office interface), while others do not and require you to invest in that component separately.

After the document has been created, it may also be transformed into another format. Document conversion, by definition, happens after document creation. And as with document



collaboration, it is not necessarily a required step because the document generation solution may have already produced the document in the desired format. In other words, some document generation solutions include built-in document converter tools.

The final piece of the puzzle is document management. This often is a separate solution; document management systems do not typically offer document generation capabilities, and document generation systems do not typically offer document management features.

Options for Document Software

Now that you have a solid grasp of the different types of document software on the market, let's look at a few major players in each category. Some of the solutions fall into multiple categories, but we've listed them here based on their primary or best-known purpose.

Document Generation

Windward: Windward's unique and flexible solution is one of the few—if not the only—document generation software programs on the market that lets users design, edit and generate documents completely in Microsoft Word and Excel. This allows business professionals to create letters, policies, contracts, statements and other company documents without relying on IT while still maintaining complete control over the exact document layout desired. Along with document generation, Windward has built-in document collaboration (through the MS Office interface) and document conversion tools.

Windward is also known for the powerful engine behind the MS Office design interface. The Windward Java or .NET Engine runs on one or more servers as part of your server-based application and can easily produce millions of pages per day. In addition, Windward is known for outstanding customer service. (See sidebar on page 5 for one customer's experience with Windward.)

Windward Studios has been in business since 1997 and is based in Boulder, Colorado. Windward has customers spanning 70 countries in industries including consulting, banking, energy, financial services, government, health care, insurance, manufacturing, technology, telecommunications and transportation. Plus, Windward has partnered with OEMs, Systems Integrators, ASPs and Resellers to help them deliver exquisite reports and excellent support.

HotDocs: HotDocs is a software platform that automates the process of producing documents and forms. The HotDocs process app queries a user for all the information necessary to generate a document (or set of documents) and



then generates the documents, inserting and formatting variable information, inserting the right clauses based on transactional conditions, and inserting correct pronouns and verbs.

HotDocs began as a research project in the 1970s at Brigham Young University Law School. HotDocs Corporation became the property of LexisNexis in 1999, and in 2009, Capsoft UK bought the HotDocs business from LexisNexis. HotDocs is focused on the banking, legal, insurance, government and publishing industries.

Paris Desktop: Paris Desktop is a document creation system that is a single point of control for the production of personalized documents. From the Paris Desktop Launchpad, users can create a new document type, print a job by merging variable data from a database file, or print copies of Forms. It is designed to print directly to a wide range of supported Xerox devices.

Paris Desktop is available from XLPrint software, a Xerox alliance partner. XLPrint has been producing document production and workflow solutions for more than 25 years; XLPrint is headquartered in Surrey, England with offices in Australia and the United States.

Document management

Microsoft SharePoint: At its core, Microsoft SharePoint Online is a content and document management service. Users log in through the SharePoint portal where they can check out, edit, organize and otherwise manage documents. Recently, however, Microsoft has expanded SharePoint's capabilities; it now includes technologies for designing websites and an offline desktop service.

Dokmee: Dokmee is document management software that can both be run on an intranet with multi-user capabilities or as a web-hosted system with access from multiple web browsers. It carries a wide array of features such as an organized folder structure, keyword and full-text searches, unlimited scanning from workstations, index fields and annotations.

BlueDoc: Web-based BlueDoc from Blue Project Software is a robust system designed for multiple users simultaneously. It allows users to define document categories, search on multiple criteria (including full-text and file formats), manage access rights, define workflows, and create and recall document versions.

The Power of Automated Document Generation

See the power of an automated document generation system at work. This real-life example shows how a major human resources solutions provider uses Windward to generate millions of pages per day.

AON HEWITT'S Key Performance Metrics

Tested Volume of Reports/Speed

- 5,000 documents each minute, at an average of 5 pages per document
- Document generation totals: 1,500,000 pages per hour, or 36 MILLION pages per day

Tested Number of Concurrent Users

- 2,500 concurrent users on a small 2-4 core system.
- Windward was not affected; limitation was determined by current bandwidth access to the database.
- Aon recommended internal focus shift to setting up databases to properly handle large volumes of users because "this will limit the speed before any limitation is seen from Windward."

Tested Complex Table Setup

- 40,000 tables, 30,000 views and 1 Terrabyte of information sent out to Windward for a single customer.
- Able to reduce reading the table in DB2 from 40 minutes down to under 2 seconds by tweaking the XML Schema for smaller tables and faster loading
- Never encountered a limitation that Windward could not handle.

About Aon Hewitt

Aon Hewitt is among the world's top global human capital and management consulting firms. Aon Hewitt uses Windward's document generation solution to reduce complexity, production time and total cost.

Document collaboration

Perforce Commons: Perforce Commons is a drag-and-drop document collaboration program for business files ranging from Microsoft Word documents to hefty video files. Users drop their files into the software and it automatically stores them, creates back-up copies and assigns versions numbers. The program provides the ability for individuals to view changes before merging files, accept or reject edits within documents, and work in parallel across teams while storing information in the permanent file history.

MediaWiki: MediaWiki is free, open source software that was created for Wikipedia but whose use has been expanded into other wikis. Organizations use the software to allow users to collaborate on Web-based documentation. For example, Stanford University's IT department offers it to departments and groups that post wikis on the Stanford.edu web site.

Google Drive: No roundup of document collaboration tools would be complete without mentioning the popular site Google Drive. A beefed-up version of Google Docs, it is a place for users to upload, edit, create and share documents (among other things). The web interface offers features such as visibility options, access levels, adding collaborators via name or mailing list, and transferring file ownership.

Document converter

Neevia Document Converter: This free online tool allows you to upload individual documents and then output them as PDF or image files. The file is stored as a URL that you can view and share with others. Neevia also offers the option

of compressing, merging or resizing PDF files online, and the Document Converter Pro tool allows for batch conversion.

AVS Document Converter: The AVS Document Converter is a downloadable product for converting files to and from a wide range of formats, including DOC, PDF, DOCX, RTF, TXT, HTML, TIFF and more. Notable features include the ability to transfer regular text formats to e-pub format in order to create e-books, password and editing restrictions for PDF documents, and automatic file compression. The AVS interface is available in English, French, German, Spanish, Italian, Japanese and Russian.

Aspose.PDF for .NET: Aspose.Pdf for .NET is a PDF document converter that enables .NET (ASP.NET, C#, VB.NET) applications to read, write and create PDF documents. It supports a wide range of input and output formats and the feature set includes PDF compression options, table creation, support for graph objects, hyperlink functionality, extended security controls, custom font handling, and data integration.



Finding the Right Document Solution

The ideal solution for your business may be one or a combination of any of the above types of document software, and keep in mind that some software packages offer multiple functions.

But they all have one thing in common: they are designed to automate document processes, and that automation will save you valuable time and money.

Why the Windward Document Generation Solution?

Unlike other docgen tools, the Windward solution allows your end users to efficiently create and update document templates *without taxing developers*.

At Windward, we believe that creating documents should be simple and that free-form template design is a must. You deserve attractive, informative and impressive documents, but most of the solutions companies build or are forced to rely on make it overly complex and tedious.

That's the problem we set out to solve. Windward provides a unique experience using Microsoft Office to format and edit document templates. Behind the scenes, Windward's

About Windward

For businesses in document-intensive industries, Windward Studios is the document generation and reporting software company that empowers business professionals to create beautiful, professional reports. Create custom reports with Microsoft Office as your design tool and a Java or .NET engine that connects to virtually any data source. Windward has been delighting customers since 2004.

sophisticated engine pulls data from multiple sources and merges that data into your documents, creating a fast and hassle-free experience that can make generating documents fun.

Windward delivers a solution that allows IT professionals to create basic templates and business users to customize those templates and create variations to meet their reporting needs. For details about the technology, its applications, and how it has been successfully deployed to automatically generate documents from nearly every existing data source, please visit the [Windward Studios website for an overview video and free trial](#).

Add Document Generation to Your Software Application

[Download a free, 14-day trial](#) of Windward's products or [request a live demonstration](#).