

# Your Complete Checklist for Evaluating Reporting Software

*All The Right Questions to  
Ask When Considering a  
New Reporting Solution*

**WINDWARD**

## Let's Get Started!

You've identified a need for a new reporting component for your company or product. Now what?

Evaluating reporting software can be a complex process. Vendors make many of the same claims ("We're the easiest to use, our output is the most flexible, our customer support is the best" – do these sound familiar?) but those claims can't tell you whether *their* reporting or document generation software will become *your* competitive advantage.

For this reason, we've created a checklist to assist you in getting to the crux of the matter: **determining which specific solution is the best one for your unique situation.**

This guide features a series of questions to ask yourself during each step of the evaluation process.

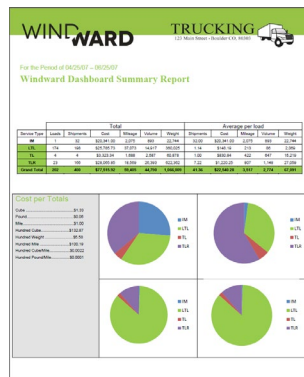
## The Eight Key Evaluation Topics

### 1. YOUR BUSINESS REPORTING NEEDS

First, let's establish a clear picture of your organizational setup, what you do on a day-to-day basis, and the needs of your customers or end users:

#### Your Organization

- ☐ Do you need reporting that will be integrated into your own software offering (OEM)?
- ☐ Is your business producing reports for internal or external use (or both)?
- ☐ Does your industry mandate specific reporting standards?
- ☐ How is your company's data organized?
- ☐ Have you already identified a list of reporting product requirements?



#### Your Role

- ☐ How much technical knowledge do you have (e.g., programming, database administration, etc.)?
- ☐ How much time, if any, do you personally have to devote to reporting?
- ☐ What types of data and how much of it are you responsible for reporting on?

#### Your Target Audience

- ☐ Are they primarily located in one region or are they an international audience?
- ☐ Do you offer your products for a specific industry or for a more generic use?
- ☐ Does your customer base need a fixed volume of reports (e.g., very large or very small numbers) or will it need a scalable solution?

With these answers in hand, let's move on to considering one of the most important criteria: how quickly and easily you can design templates.

### 2. TEMPLATE DESIGN EASE & SPEED

Consider the types of reports your company or product generates and their current visual impact. **Now think about how you'd ideally like those reports to appear.**

#### Report Layout

- ☐ Do your reports contain large chunks of data that would be best organized in highly configurable tables?
- ☐ Do you need headers, footers and tables of contents to enhance multi-page documents?
- ☐ Are charts and graphs the optimal format for displaying some of the information?
- ☐ Do you want banded reports (where all of the images, charts, paragraphs of text, etc. appear in layers) or reports that will need to take advantage of free-form design?



- ☐ Will you need to use text tools such as vertical text and preset styles in your templates?
- ☐ Do you need “special” layout features such as barcodes, PivotTables, Microsoft® Office shapes, hyphenated text, etc.?
- ☐ Do you have a large set of templates that you or a customer will need converted?

**RESEARCH TIP:** Vendor samples can spark design ideas and will give you an idea of whether a reporting package is capable of generating the designs you’ve identified as best for your company.

Downloading a trial and experimenting with the samples will give you firsthand experience as to ease and flexibility of design.

### Template Design Platforms

In your evaluation, you should also try to assess how quickly you (or your end user) will be able to get up to speed on the reporting design tool or interface.

Of course you won’t know for sure until you actually use it, but here are some questions to consider once you’ve identified a potential reporting package:

- ☐ How easy will it be to learn the design tool?
- ☐ Is there significant training involved?
- ☐ Have you used a similar program before?
- ☐ Does the tool come with well-written documentation?
- ☐ Is the interface clunky or intuitive?
- ☐ Does it contain all the necessary features identified earlier, or will you need to spend time customizing the software to get the reports to look the way you want them to?
- ☐ Will users have the ability to apply the tool effectively on their own or will they have to rely on others (e.g., the IT group) to design templates?
- ☐ How time-consuming is it to edit templates?

- ☐ How hard is it to convert older templates?
- ☐ If the primary person in charge of system implementation leaves, how easy will it be to carry on with the reporting effort?

### Sharing and Co-Creating Templates

- ☐ Do teams need to work together on template editing and design, and does the package offer collaboration tools?
- ☐ Can more than one person work on a particular template and are there additional costs for doing so?
- ☐ Can more than one person view, run, edit and schedule reports?
- ☐ Does each employee need his or her own user’s license?

## 3. DATA & DATABASE CONNECTIVITY

Getting your data into a report template is often one of the most confusing or elaborate processes in the report generation cycle.

Help eliminate some of that confusion by asking yourself these questions:

- ☐ What data sources can you use in your reports?
- ☐ How many different data sources can you use at one time?
- ☐ What types of data (e.g., XML, Big Data) can you include?
- ☐ Does the package ensure data security?
- ☐ Does the software allow you to filter data categories, easily sum totals, and perform other necessary calculations?
- ☐ How difficult is it to learn how to use these data functions?
- ☐ How does the report template itself handle your data? Does it have features you need such as built-in formulas for working with data?
- ☐ Does the software include connection wizards?

We typically see three broad categories of reporting solutions:

1. Ones that require heavy coding to link to the data source,
2. Solutions with features that eliminate coding, giving the end user the ability to insert data into reports, and
3. A hybrid mixture of the first two: they typically require an IT staff member to create the data placeholders, but also enable the business user to modify these placeholders.

#### 4. PRODUCTION SPEED

Granted, you don't have a crystal ball. But after you've identified a reporting solution, try to answer these questions as best you can:

- ☐ How long does it take to design a template?
- ☐ How long does it take to add data to that template?
- ☐ How long does it take to run the report?
- ☐ How long does it take to modify a template and re-run the report?

And finally:

- ☐ What sample performance metrics can the software vendor show me?

#### 5. SCHEDULING & SENDING REPORTS

Picture this: You or a customer generates a report and presents it at a staff meeting. Two weeks later, the boss asks for a copy of the updated report, ASAP. But there isn't the ability to rerun the report because only a third party can do so.

With that scenario in mind, consider how you will need to generate ongoing reports:

- ☐ Can you simply make a request with a button click to access an updated report or do you need to take multiple steps?

- ☐ Does the solution have a built-in scheduler?
- ☐ If so, how flexible is the scheduler?
- ☐ Can you schedule reports to be automatically printed or sent via email?
- ☐ Where are the reports stored?
- ☐ How many iterations of each report can you store?

#### 6. OUTPUT FORMATS

Some reporting solutions offer only a couple of proprietary outputs, while others offer a much broader range.

- ☐ What output formats, if any, do your report recipients (or customers) require?
- ☐ Does the solution let you generate reports in digital formats that can be viewed but not altered?
- ☐ Do your customers and employees need reports where they can analyze and manipulate subsets of the data themselves?
- ☐ Are you generating letters, policies or other types of documents that must be printed first before being sent via snail mail?
- ☐ Are your customers or colleagues receiving or sending reports via email?



## 7. TRAINING & SUPPORT

Training, professional services and ongoing day-after-day costs aren't nearly as exciting as flashy template design features, but they are important.

### Vendor Communication

- ☐ How accessible is the vendor?
- ☐ What is the vendor's customer service reputation (e.g., what do online reviews say)?
- ☐ Does the vendor supply user references?

### Documentation

- ☐ What user guides, instructional videos, tutorials, and other documentation are available?
- ☐ Are there additional fees for this documentation?

### Samples

- ☐ Does the reporting program include sample reports?
- ☐ Do the samples show you how to accomplish your design goals?

### Initial Training

- ☐ What kind of training does the vendor provide?
- ☐ Will the vendor walk you through a training session, and is its staff available to answer questions by phone or email?
- ☐ Does the vendor hold online seminars where users can ask questions and learn from other users?
- ☐ Once someone in your organization is versed in a product, how much time and energy will he or she spend teaching others how to use it?

### User Communities / Forums

- ☐ What user groups are available?
- ☐ How is information shared in these groups?
- ☐ How well are user questions answered and issues resolved?

### Technical & Ongoing Support

- ☐ What support packages are offered and at what charge?
- ☐ What free support options exist?
- ☐ How available is the support team?
- ☐ Is there a searchable knowledge base?
- ☐ How does the vendor handle ongoing support?



## 8. INFRASTRUCTURE & COST

And finally, we come to the pricetag. It's impossible to determine in advance exactly how much a reporting solution will cost, but you can arrive at a fairly solid estimate when you look at the options, services and conditions that will affect your ROI (Return on Investment) and TCO (Total Cost of Ownership).

### System Compatibility

- ☐ Will the solution integrate into your current infrastructure or product?
- ☐ What programming languages are required?
- ☐ How long will it take to embed the solution into your software product (OEM)?

### Scalability

- ☐ Will the solution grow as your company does?
- ☐ Does licensing change with increased output or number of users?

## Implementation Costs

- ❑ What will your expenditures be in terms of time spent and resources devoted to implementation?

## Hardware and Software Costs

- ❑ How much up-front investment will you need to make in software?
- ❑ Will you need to upgrade any related software?
- ❑ Will you need to buy or lease new hardware?

## Administration Costs

- ❑ How much will you spend in ongoing maintenance of the reporting solution?
- ❑ Does this solution require a dedicated IT resource?

## Your Next Step

We hope you find this checklist useful in helping you get started on the reporting software evaluation process. As you evaluate a variety of options, we invite you to consider Windward.

## Why the Windward Solution?

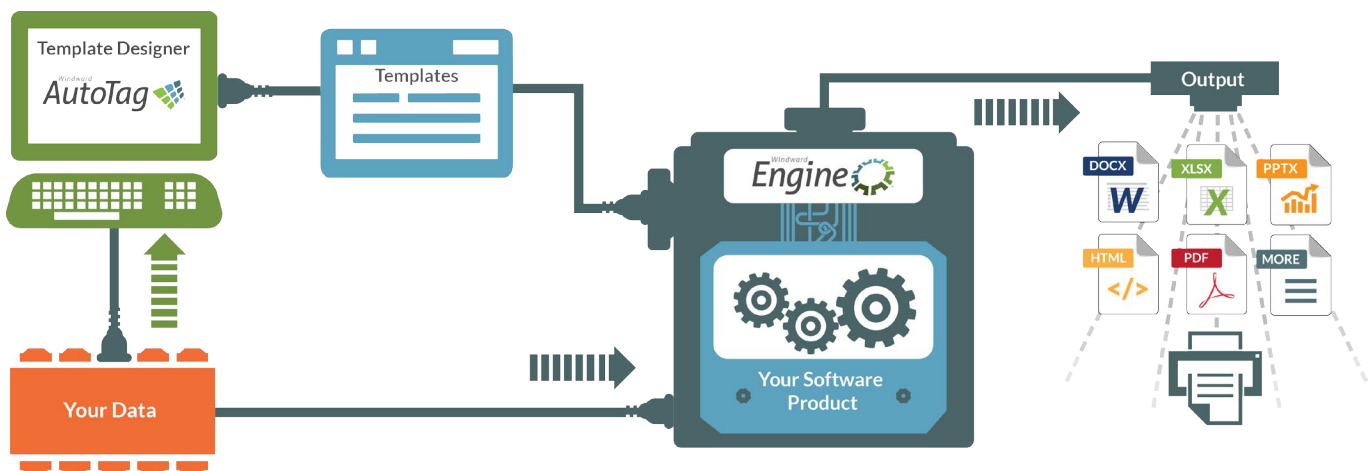
At Windward Studios, we believe that reporting and document generation should be simple, that free-form template design is a must. You deserve attractive, informative and impressive reports.

But most of the solutions companies build or are forced to rely on make it overly complex and tedious. Why can't designing and generating reports be as simple as creating a Word document, Excel® spreadsheet or PowerPoint® deck?

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

Windward delivers a solution (see below) that allows IT professionals to create basic templates and business users to customize those templates and create variations to meet their reporting needs.

Behind the scenes, the sophisticated engine pulls data from multiple sources and merges that data into your reports, creating a hassle-free experience that can actually make generating reports fun.



**The Windward Embedded Solution** is ideal for anyone who needs to add Reporting and Document Generation functionality to their desktop, online, SaaS or mobile products.

It's as simple as **embedding** the .NET or Java Engine into your product, **designing** your template with AutoTag, which connects the Microsoft Office template with your data source, and **delivering** your documents in whatever format your users require.

## Applying the Checklist to Windward

So, how do we rate? We're happy to answer any or all of the questions above. Our responses include:

- ❑ **Simple yet flexible report design:** Use all of the powerful features you already know in Microsoft Office, including charts, PivotTables, shapes, headers, footers, images and more.
- ❑ **Multiple data source support:** Connect to as many data sources as you need in a single report, including Big Data, file-based data and most every data source.
- ❑ **Efficient report production:** We move the template creation and modification from the IT department to the business professional.
- ❑ **Easy to embed:** You can embed it into your new or existing software application in as little as 14 lines of code.
- ❑ **Flexible output generation:** Reports at the click of a button, to the standards of your organization and customers: DOCX, RTF, PDF, HTML, XLSX, or even directly to your printer.
- ❑ **Abundant learning resources:** We offer a website filled with samples, tutorials and product documentation.
- ❑ **Flexible licensing and pricing:** Windward requires no hardware, and we offer a variety of cost-effective licensing options for SaaS, mobile, desktop and enterprise deployments.

## 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.

Windward OEM and enterprise customers span over 70 countries and all industries, including financial services, insurance, energy, healthcare, HR and technology. We've been delighting customers since 2004.

Our primary products are AutoTag, a design tool that creates custom templates with Microsoft Office, and a Java or .NET engine that connects to virtually any data source.

Windward delivers exceptional support, training, and documentation, with a 98% satisfaction rating from our customers. We're a Microsoft Gold Partner and an Oracle Gold Partner.

## Come see the Windward difference.

We invite you to check out the Windward Embedded Solution. It not only delivers on cost, features, and ease of use, it simplifies how you generate reports and documents. See for yourself whether our reporting or document generation software can become your competitive advantage.

## Upgrade Your Software Product's Reporting and Document Generation

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