

“ I spent half my time designing and scripting reports to meet the bank’s requirements prior to using an Office-based report design tool. Now we can lay out a report in Word and get immediate approval from the client. —S.S. Mohanty of Nucleus Software Exports ”

How to smash the reporting bottleneck

Top 7 reasons why Microsoft Office is the ideal report design, document generation and mail merge tool



For many companies, reporting and document generation is costly and time-consuming. A business user needs a report. The business user solicits the developer’s help. The developer creates the report. The business user provides feedback. The developer refines the report. And so it goes, ad nauseam.

This iterative process is slow, expensive and frustrating. Worse still, the final report created is inadequate.

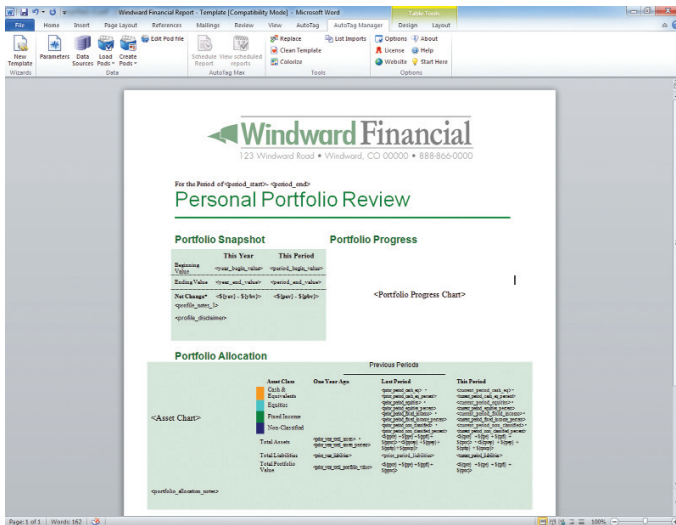
But it doesn’t have to be like this. The process can be such that department heads, product managers and other business users can do it alone. Reporting CAN be affordable and quick.

The key to this new approach is using Microsoft Office as the design tool. Microsoft Word, Excel and PowerPoint give business users the flexibility and features they need to create top-notch enterprise reports. When you use Microsoft Office for reporting, document generation and mail merge, you save your company significant time and money.

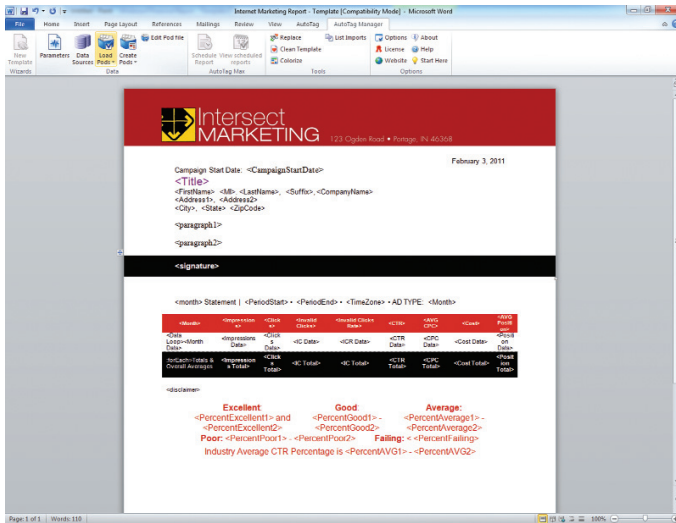
Reason #1: You eliminate the biggest expense.

The most expensive part in the report creation process correlates to the design tool’s ease-of-use. Microsoft Office’s menus and toolbars make the program easy to use. Want to insert a table? Just point and click. Need a company logo moved from one part of the header to another? Simply drag and drop it to the right place. Commands are right in front of you and simple to work with, so you save oodles of time.





Looking for a specific report formatting tool in this financial report? There isn't one. This report was formatted with Microsoft Word's built-in tools and the data was dragged and dropped onto the template via AutoTag.



Place data anywhere on your template, as opposed to banded template designers which force you to place data and other elements in parallel rows. Now your template can look exactly the way you want it to.

Reason #2: Familiarity breeds... time savings, of course.

The more you use a program, the more familiar you become with its features. The more familiar you are with a program's features, the faster it is to use. This is a key advantage of using Microsoft Office to design reports and documents. Most business users already know how to format text, insert images, add rows to spreadsheets, and work with other tools useful for report creation. They don't need intensive training in a new program, so they can jump right in and design.

Reason #3: Escape the limitations of a banded design tool.

Many tools restrict the user to what is known as "banding" – where elements of a report are confined to limited sections called bands. For example, you might have a table in one layer, text in another, and so on. MS Office is a non-banded (aka free-form) solution, so can lay out elements as you wish. This gives you significantly more freedom than with other tools and ensures the final report looks the way you want it to.

Reason #4: Formulas for success.

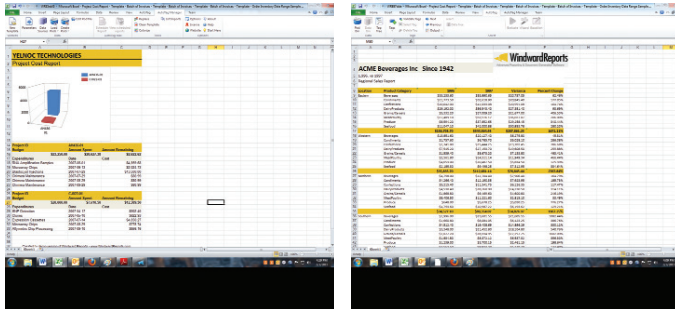
Herbert Swope may be right when he says "there's no formula for success". (He adds there's a sure one for failure: try to please everyone.) But there are formulas for success in reporting, and they're found in Microsoft Excel. For example, consider the sum function, a handy formula for reports such as invoices. When your data changes, the sum total automatically changes too, no matter how many records are in your database. Features like this further automate your reporting and help you save time.

Reason #5: Output that meets your needs.

When you design a report in Microsoft Word, Excel or PowerPoint, you typically have the option of generating the output in Microsoft Office as well, depending upon the program you use. This can be a significant advantage when you want reports to be manipulated. For example, end users can easily remove sensitive pieces of information (eg. salary figures) from an HR report and then distribute the



Compared to systems where both layout and data must be coded, as we did before, the process of creating a new report is at least 5 times faster. —*Bjerregaard Pedersen of Backbone Digital Systems on using Microsoft Office to design reports.*



With AutoTag in Excel, not only do you have a free form design tool with an already familiar interface, but the power of Excel spreadsheets as well. Analyze your data on the fly with Excel formulas and charts.

report to other departments. But there's nothing inherent in an Office report design tool that says the output must be able to be manipulated, and obviously in many cases you'll want a fixed output. Some Microsoft Office report design tools provide you with the freedom to distribute a Word document to some recipients, a PDF file to others, and an HTML report to additional recipients.

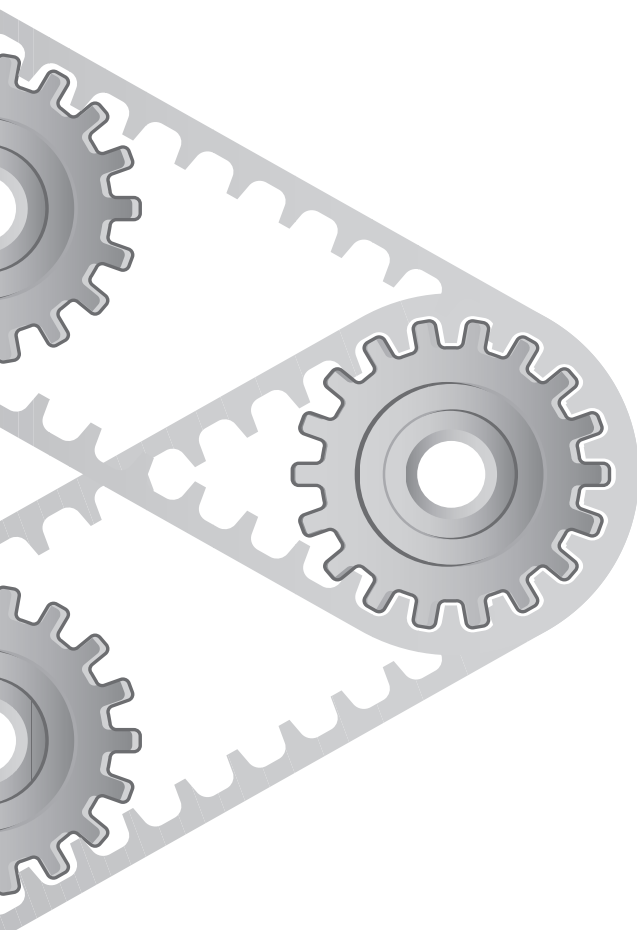
Reason #6: Play well with others.

Creating reports in Microsoft Office lets you break the cycle of needless iterations, but there are plenty of times when working with colleagues is a GOOD thing. When you use Microsoft Word, Excel or PowerPoint to design reports, not only can multiple people easily learn to use the tool, but they can also work on a specific report together. Microsoft Office 2010 includes notable collaboration features such as real-time communications within a document, co-authoring of projects, and the ability to remotely access Office files. In addition, when used within SharePoint, all of SharePoint's collaboration tools are also available.

Reason #7: An end to the endless back and forth.

You're a business user who needs a report. You beg the IT folks to create you one. It isn't what you envisioned, so you mark it up and ask for a new version. When the overworked IT person finally gets around to it, once again it isn't exactly what you need. So you go through the process again. And again. And again for the next report. But when you use MS Office as the report design tool, you don't have to wait on IT. You can design the report yourself, so you get what you need when you need it.





Spotlight on: The Windward Solution

The Windward Reports design tool, AutoTag, is an add-in for Microsoft Word, Excel and PowerPoint. Windward lets you create professional templates that look exactly the way you want them to, and business professionals can design these templates without relying on IT staff.

Then, via a series of API calls, Windward pulls data from any number of data sources (including XML files, SQL databases and Excel spreadsheets) and merges the data with your templates. The Windward solution is available for Java or .Net, and there's no need for a dedicated server or to install Microsoft Office on your server.

To generate a report or other document, simply click a button and choose the desired output format, including HTML, PDF, DOCX, XLS, PPTX, direct to printer and more. The result is a finished report with all the formatting and positioning specified by the designer - available in minutes.

About Windward Reports

For more than a decade Windward Reports has been making it easy for companies to break the reporting bottleneck. Headquartered in Boulder, Colorado, Windward Reports has customers spanning 70 countries in industries including consulting, education, energy, financial services, government, health care, insurance, manufacturing, technology, telecommunications and transportation.

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