



A Comparison of HotDocs & Windward

At first blush, Windward and HotDocs appear similar enough that they might seem close competitors. Both solutions are self-described as ‘document generation.’ Both solutions allow developers to design templates in Microsoft® Word that are then used to generate documents. Both solutions offer user-oriented designers.

Yet despite these parallels, the two products are *substantially different* in their targeted use cases. This document will help you identify which tool should be used for which purpose.

While Windward is often used to generate sorted/filtered/aggregated documents from a database (e.g., a table of employees as of March 1 sorted by revenue), HotDocs is unable to generate documents consisting of data outside of a single user (table row). HotDocs does not have a reporting component. Instead, HotDocs generates documents based off of what it labels as ‘interviews.’ The program mail merges ‘answers’ from customer forms into templates set up in Word.

An Example Use Case

A tax law firm has many clients in one day. The law firm finds that a large portion of clients need to have the same contract built for them, but small modifications need to be made for each individual client. For HotDocs, the law firm has an IT or business professional use the program to design a template for the client contract. Once the clients fill out a computer interview, HotDocs then merges the answers from the interview with the previously designed template and outputs a PDF or Word document to an organizational interface.

With Windward the process is much more automated. The law firm needs to process NDAs and billing statements for every client of the firm. A business or IT professional uses Windward to design the templates in Microsoft Word by easily dragging and dropping the field placeholders in their designated areas. The designer can quickly create a client ID variable to filter these fields to display only the current client information. The template can then generate this report for a list of all clients via the Windward Engine, which is integrated into a custom stand-alone or web-based application. Via this batch processing, Windward efficiently generates accurate documents in a fraction of the time.

Product Comparison Table

FEATURE	HOTDOCS	WINDWARD
Data Source Connectivity	SQL and Access Databases (via JDBC) ODBC/OleDb (ADO.NET) Flat Files (TXT, CSV, XML)	SQL Based File Based Web Based Big Data
Reporting Component Reuse	HotDocs Components	Windward PODs
Interview Capability	HotDocs Interview Wizard	Not Supported



FEATURE	HOTDOCS	WINDWARD
Designer Environments	Microsoft Word WordPerfect	Microsoft Word, Excel and PowerPoint
Template Formats	DOCX, RTF, DOT, TTX, WPT, PDF, CMP	DOCX, RTF, WordML, XLSX, PPTX, HTML
Conditional Logic	IF/ELSE	IF/ELSE/SWITCH/CASE
Server	Requires Microsoft Windows Server	Library can be deployed via .NET or Java (Office does not need to be installed)
Price		
Designer	HotDocs User - \$300 per seat HD Developer - \$800 per seat	AutoTag \$995/seat Developer System \$1600/seat AutoTag + Dev Engine
Server	On Premise \$20K + \$50/user Web Server Starter - \$12.5K Enterprise - \$20K + \$250/user	Engine Licensing (Core or Thread) Engine 2 core/thread – ~\$10K Test Systems – ½ of Production
Cloud	\$15-\$20/user/month + \$1/interview run	Coming Soon

Summary

- **HotDocs targets a specific solution** for companies that need to automate the iterative administrative processes they have in place for forms for their customers (legal, healthcare, banking).
- **Windward can achieve the same iterative results as HotDocs**, but the questionnaire and data integration must be built separately in the host application.
- **HotDocs does not adapt well to use cases outside its intended purpose.** Companies requiring reports, charts, tables, database integration, images, feeds, or scheduled reports will encounter many limitations with some unsupported features.
- **Windward gives users flexibility to design freely in Office**, while making it easy to retrieve, filter and sort data from their data sources to display in an intuitive manner.
- **The biggest difference:** HotDocs users supply most of the data during report generation, where Windward users can collect and generate documents en masse from data stored in many formats and locations.

Try Windward Today!

Visit www.windward.com and [download a free trial](#) or [schedule a live demo](#).