Beginner Training Course

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Start Here

Creating a Template in Excel with JSON Data

Training Guide

Welcome to Windward Designer

Windward Studios takes a unique approach to reporting. Our Report Designer sits directly inside Microsoft Office which means you get to use a familiar and powerful tool without having to learn a new designer. If you've ever used one of our competitors' products, you may be familiar with their modular designers that require you to build reports using bits and pieces, where every bit of text or every piece of data is a distinct object in your template. Windward changes all of that. With Windward in Microsoft Office, you design report templates just like you design any other document, utilizing **Tags** to insert your data wherever you need it seamlessly in-line with your other text and content.

Training Overview

This Training Guide walks you through the fundamental steps you need to begin designing templates with Windward Designer in Microsoft Word using a JSON Datasource.

The Four Steps to Windward:

1. Install
2. Connect to data
3. Design your template & insert your data
4. Output

Step 1 - Install

To get started, you need to install the Designer. If you have it already installed, please skip this step!

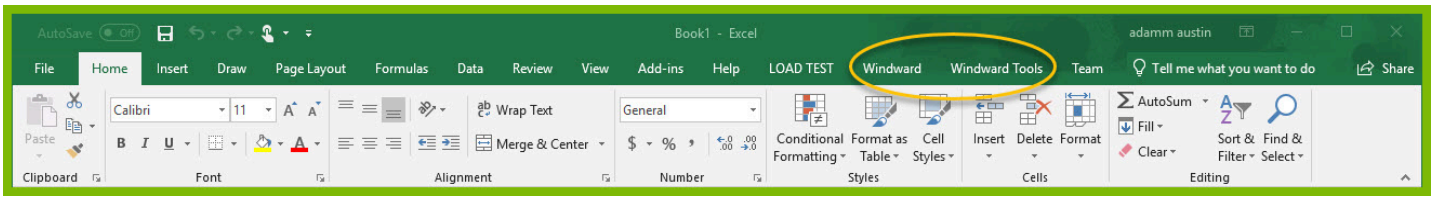
If you already have a license key, please visit the downloads page to install the software.

Or start a free 14-day trial!

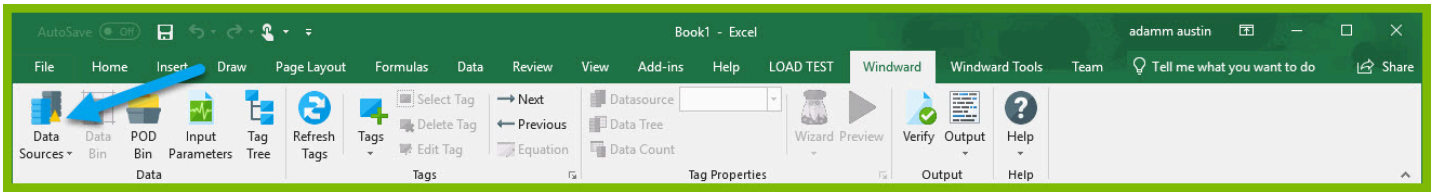
Step 2 - Connect to Data

In this training guide, you are connecting to a sample JSON Datasource provided by Windward. To connect to the sample data:

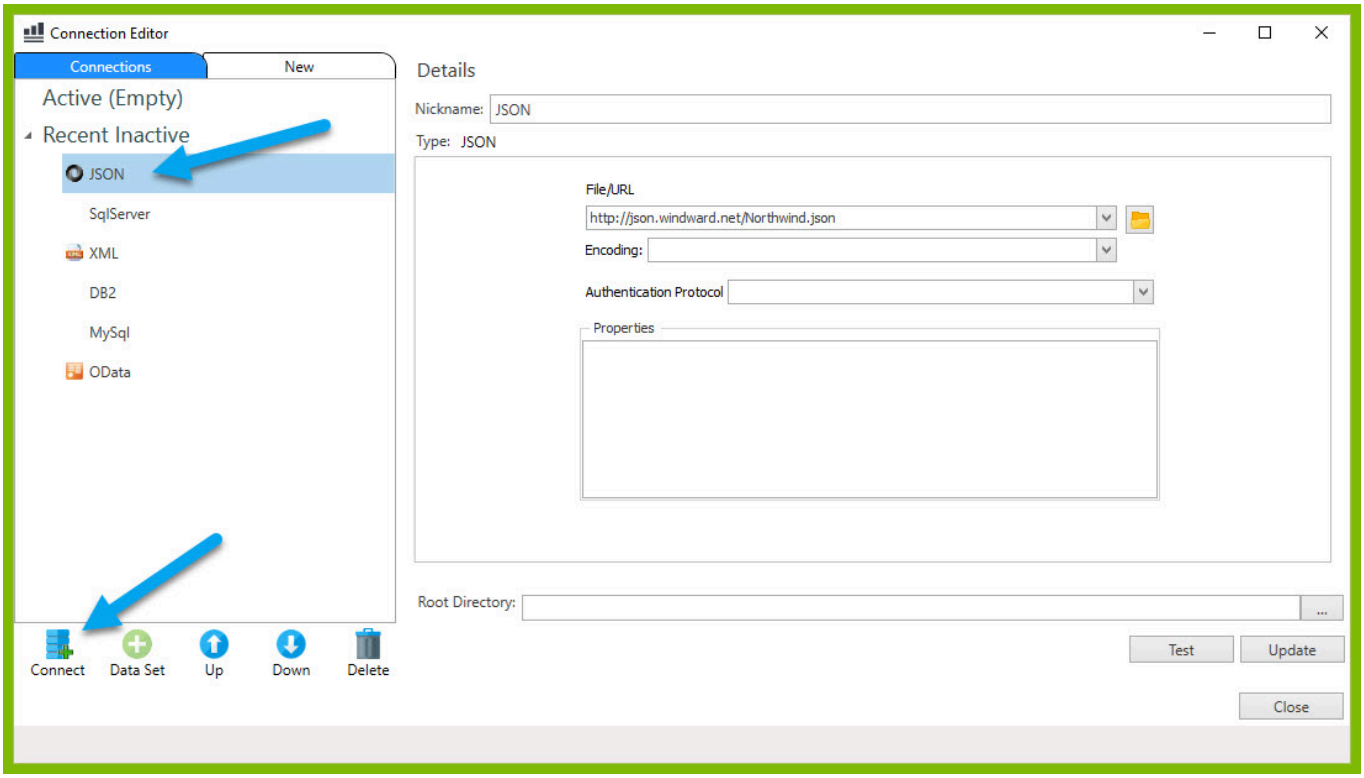
1. Open Microsoft Excel. Now that you've installed Windward Designer, you will see two new tabs in the Microsoft Office Ribbon – the "**Windward**" Tab and the "**Windward Tools**" Tab.



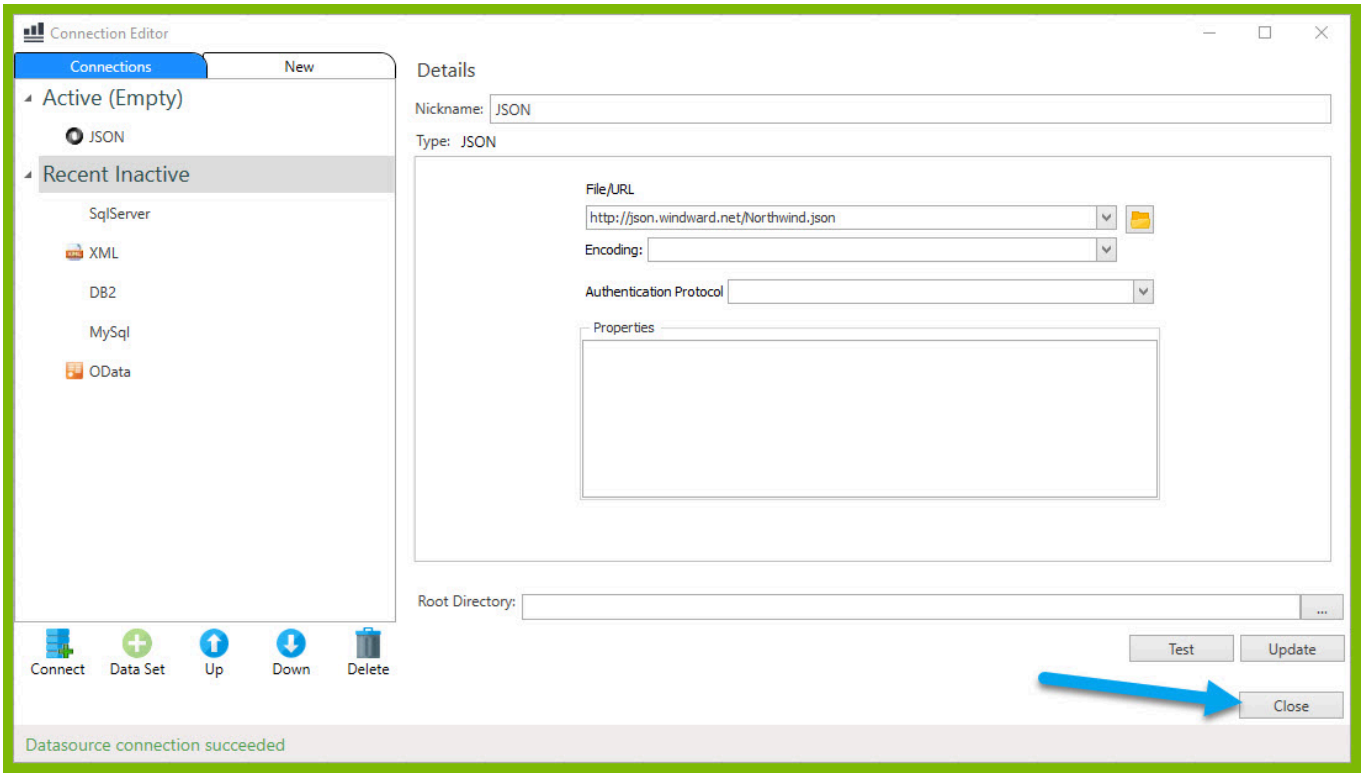
2. Click on the "Windward Tab" and click on the "**Data Sources**" button located on the left-hand side of the ribbon. This opens the Connection Editor where you will manage all of your data connections. (Alternatively, you can click on the lower half of the button to expand the drop down and then click **"Data Sources."**)



3. In the Connection Editor window, select the data connection labeled "**JSON**" under "Recent Inactive" and click the "**Connect**" button.



4. Close the Connection Editor by clicking "**Close.**" You have now successfully connected to the sample data!

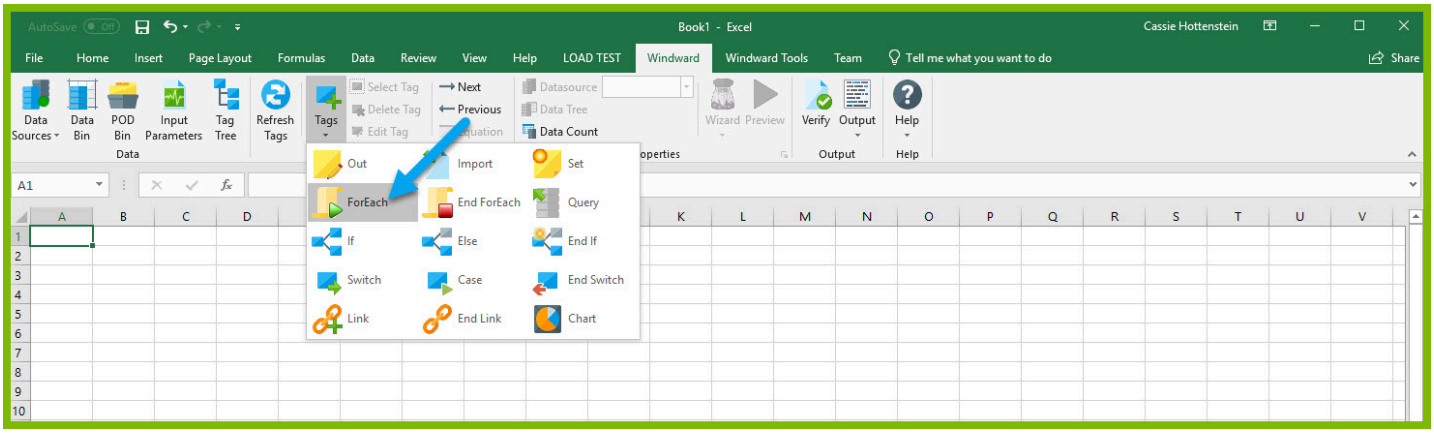


Step 3 - Design Your Template & Insert Your Data

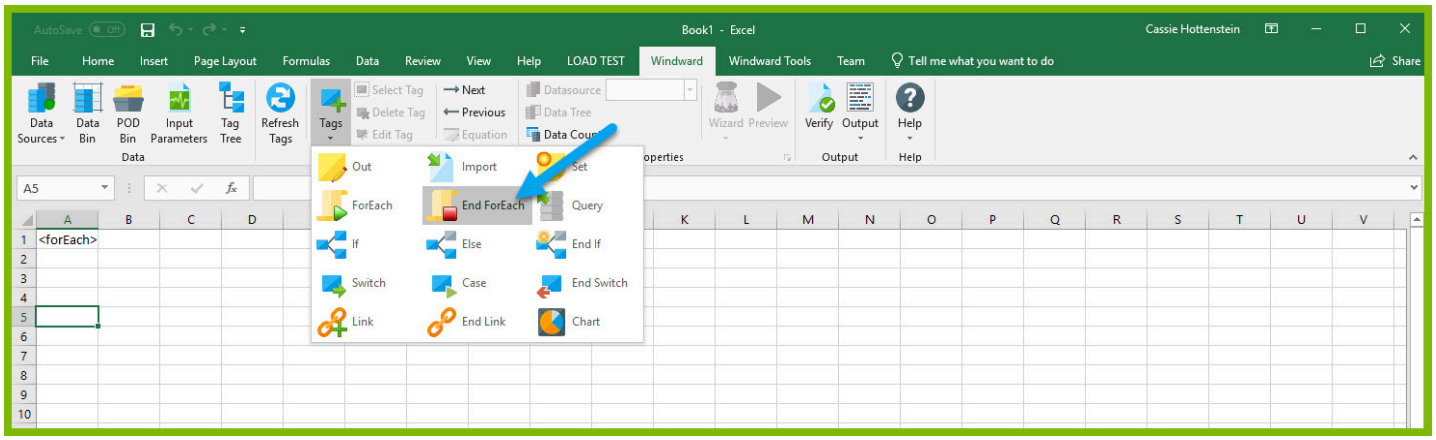
In this training guide, you will build a very basic template to get the feel of Windward Designer. While your final product may not seem very impressive, you will learn the basic skills to making any template! You will make a template which will output the product name and unit price for every product in the sample data, with each product separated by a line.

In situations where you want to output many records returned from a select, you can use a ForEach tag. The ForEach tag will generate output once for each record returned by its select. The ForEach tag itself will not insert data into the template, but rather stores data in a variable that can be used by other tags to generate output.

1. Make sure your cursor is placed on cell A1. To place a ForEach tag, expand the drop down under the button "**Tags**" in the Windward ribbon and click "**ForEach**."

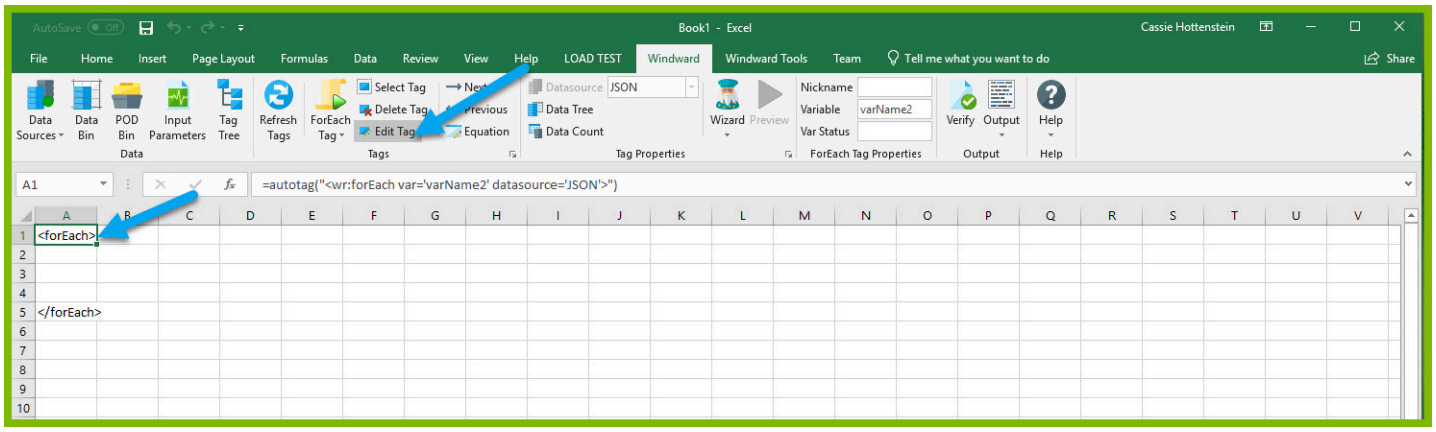


2. Place your cursor on cell A5, expand the drop down under the button "**Tags**" in the Windward ribbon, and click "**EndForEach**" to place a closing tag for the ForEach tag.

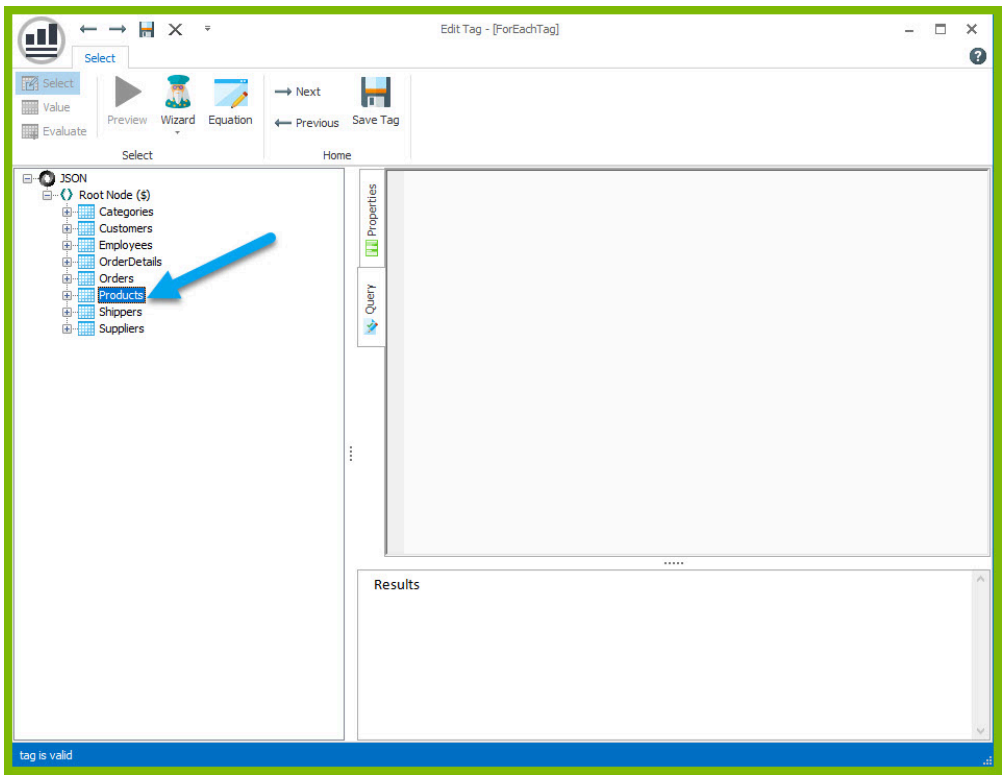


Now all of the content that you place between the ForEach and EndForEach tags will be generated once for each record returned by the ForEach tag's select.

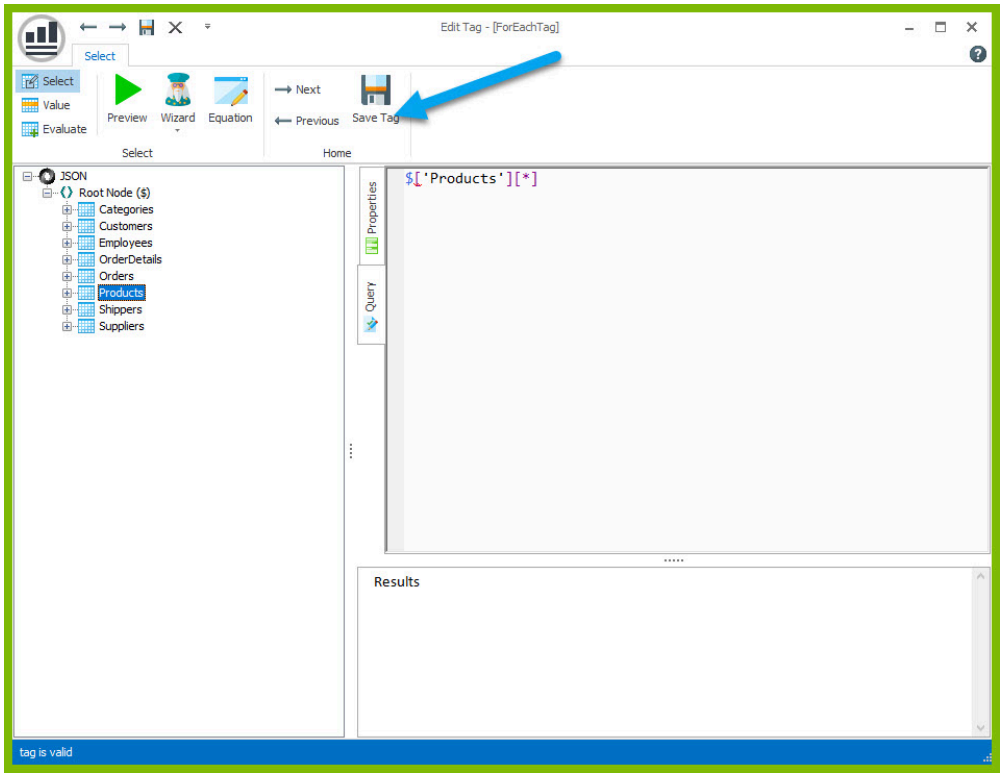
3. For the ForEach tag, you will select the Product node so that you can output information on each product. You can use the Tag Editor to easily create a query for your tag. Place your cursor on the A1 cell containing the ForEach tag that was inserted in your template and click the "**Edit Tag**" button in the Windward ribbon to open the Tag Editor.



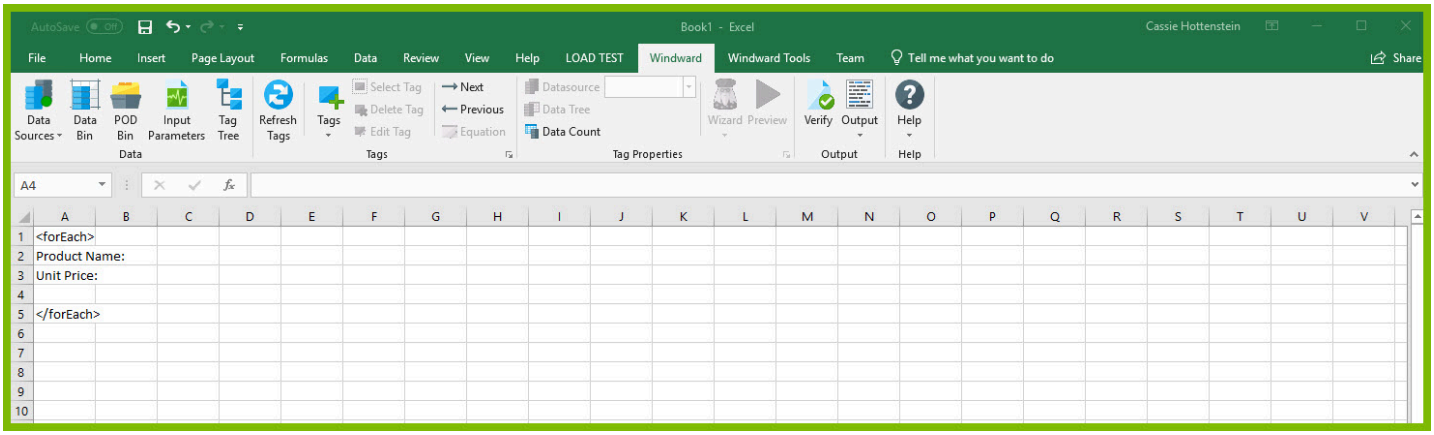
4. In the Tag Tree, expand the node JSON -> Root Node ($) and double-click the "**Products**" node. This will automatically write a select for the Products node.



5. Click the "**Save Tag**" button. Congratulations! You have just inserted your first tag into your template!



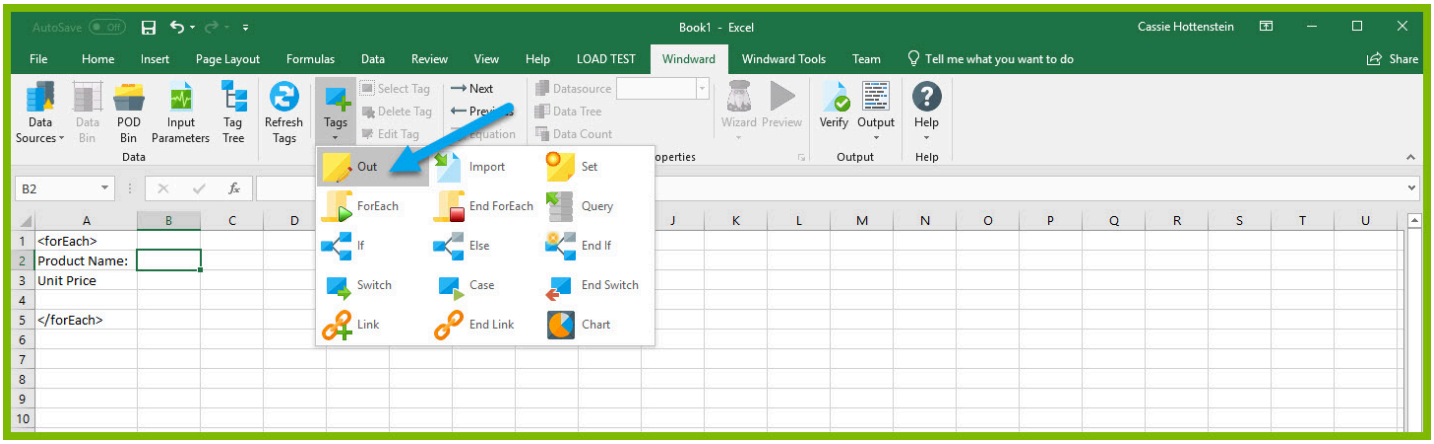
6. In the next cell after the ForEach tag, enter the text "Product Name:" and in the next cell "Unit Price:"



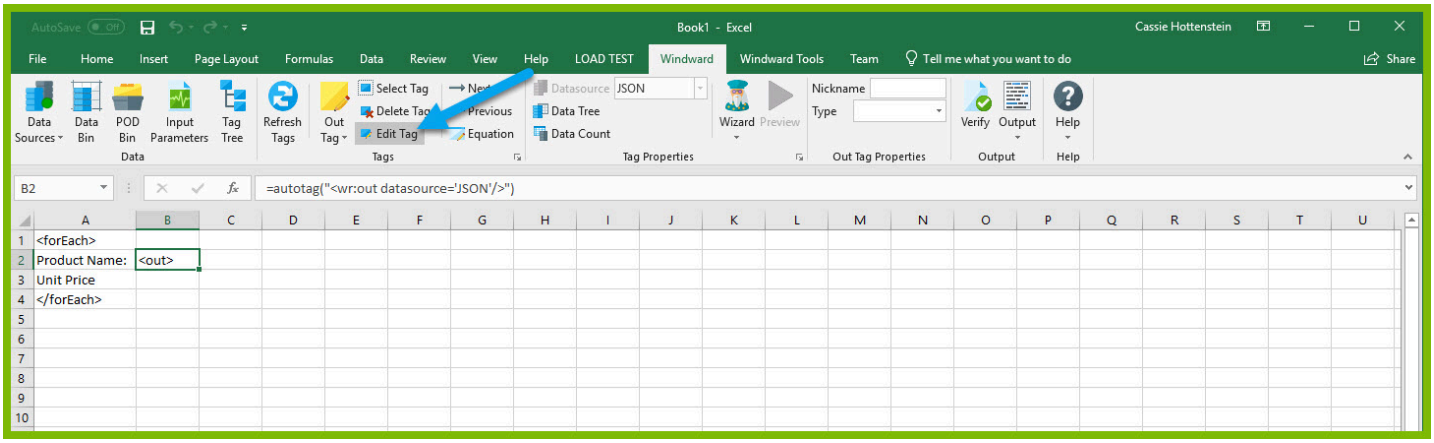
The “Product Name:” and “Unit Price” text will be output for every product returned by your ForEach tag’s select.

Out tags will be used to insert data into your final report. These tags will output the Product Name and Unit Price for each product after these labels.

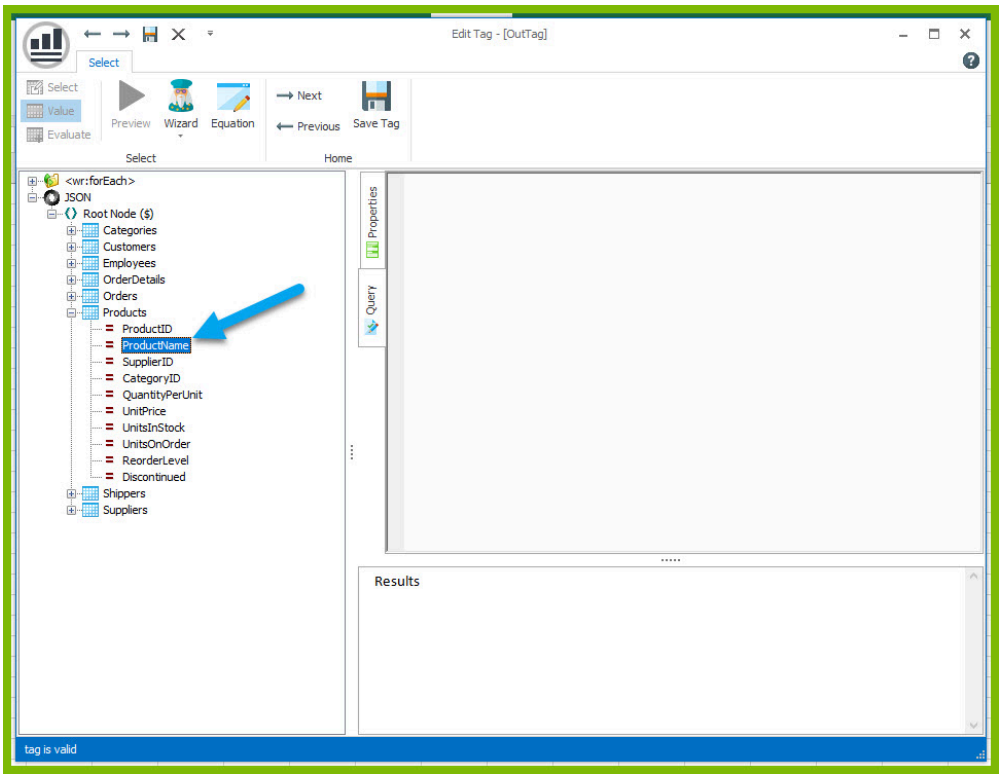
7. Place your cursor in the cell to the right of the “Product Name:” text, and click “**Tags**” in the Windward ribbon and click “**Out.**” This places an Out tag in the cell.



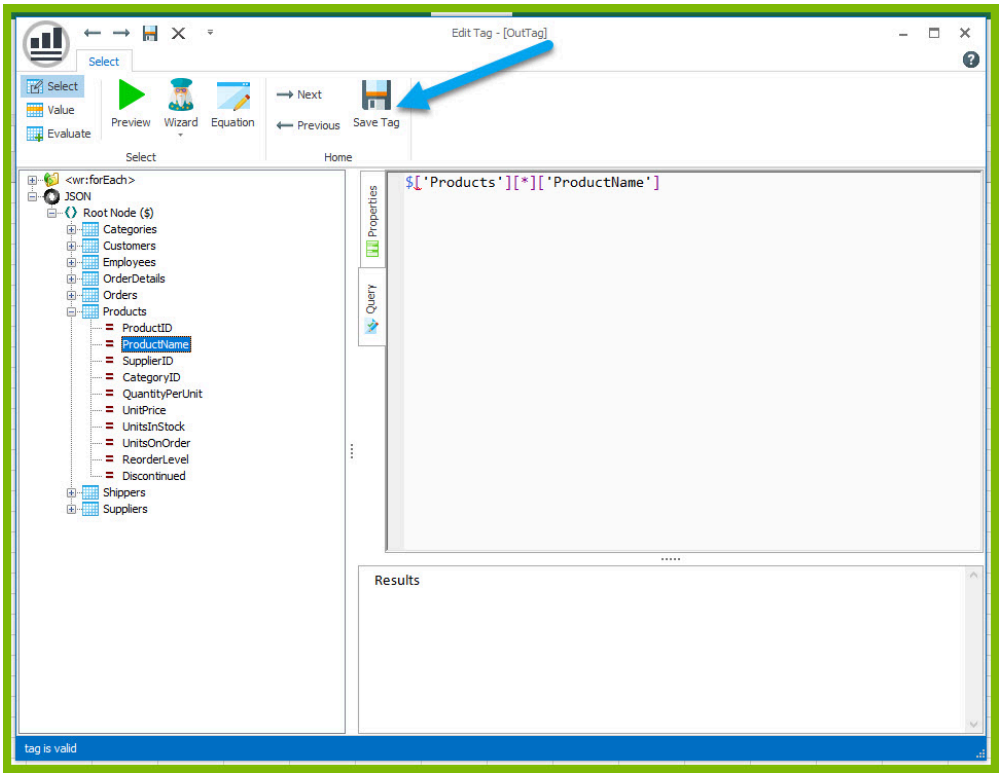
8. Open the tag Editor by placing your cursor on the cell containing the Out tag and clicking “Edit Tag.”



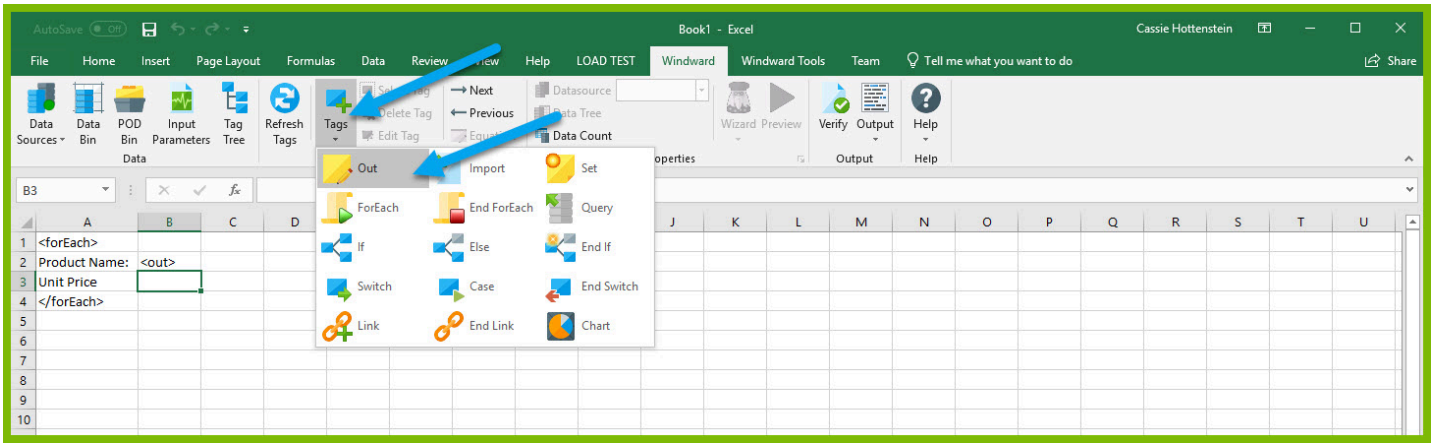
9. You can now see your ForEach variable in the tag editor since the Out tag occurs in the template between the ForEach tag and the EndForEach tag. In the Tag Tree, expand <wr:forEach> -> ${varName1} and double-click **ProductName**. This automatically queries the ProductName currently held by the ForEach variable.



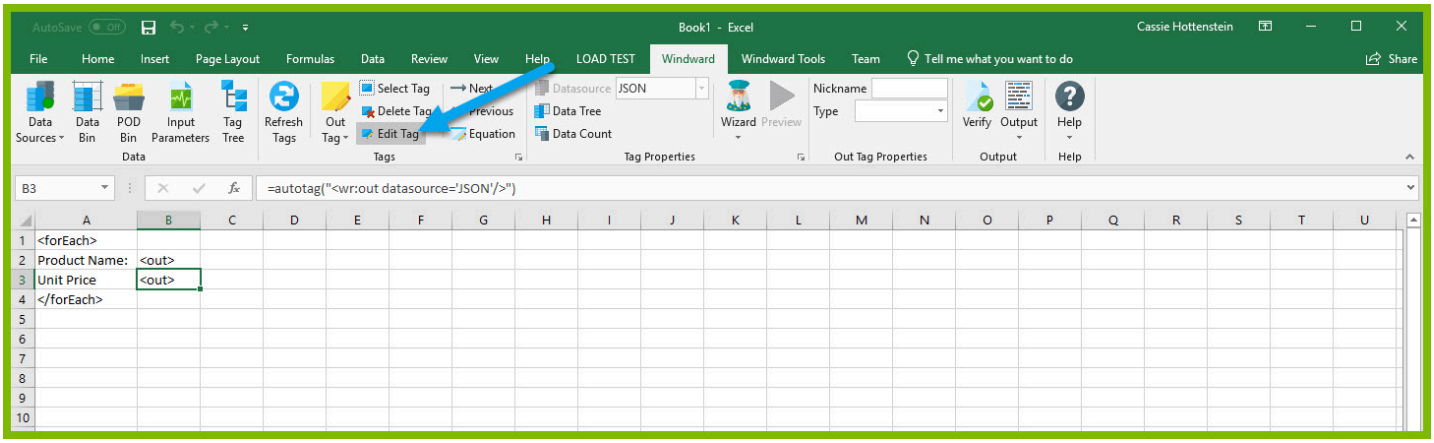
10. Click the "**Save Tag**" button to save your tag's query.



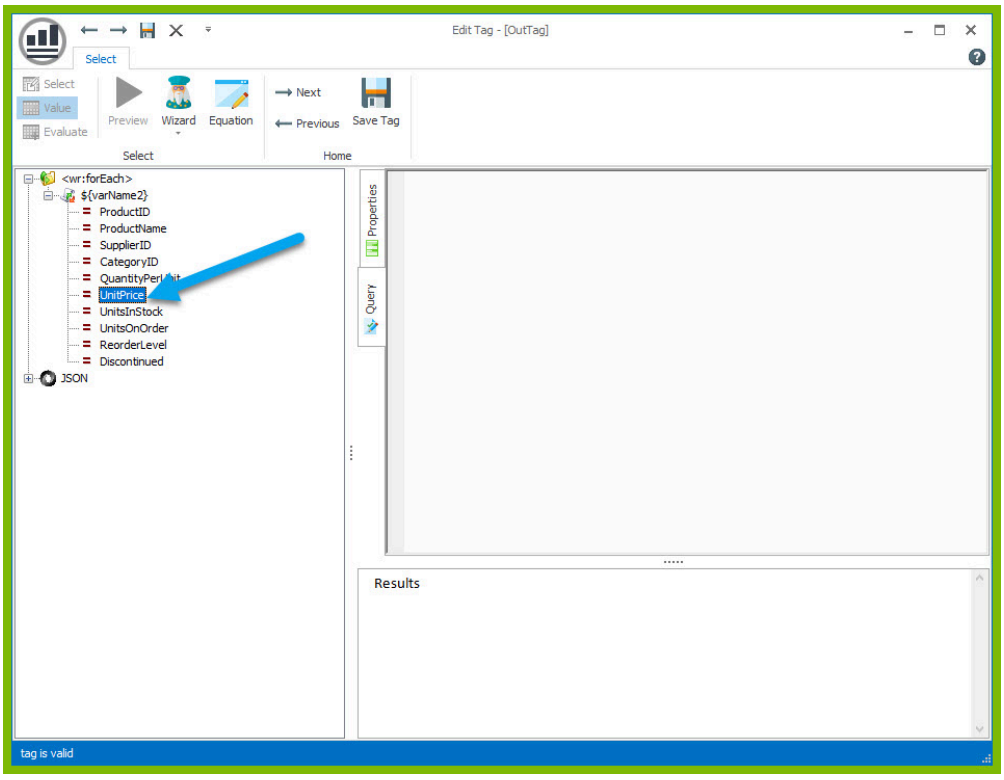
11. Place your cursor in the cell to the right of the "Unit Price:" text, and click "**Tags**" in the Windward ribbon and click "**Out.**" This places an Out tag in the cell.



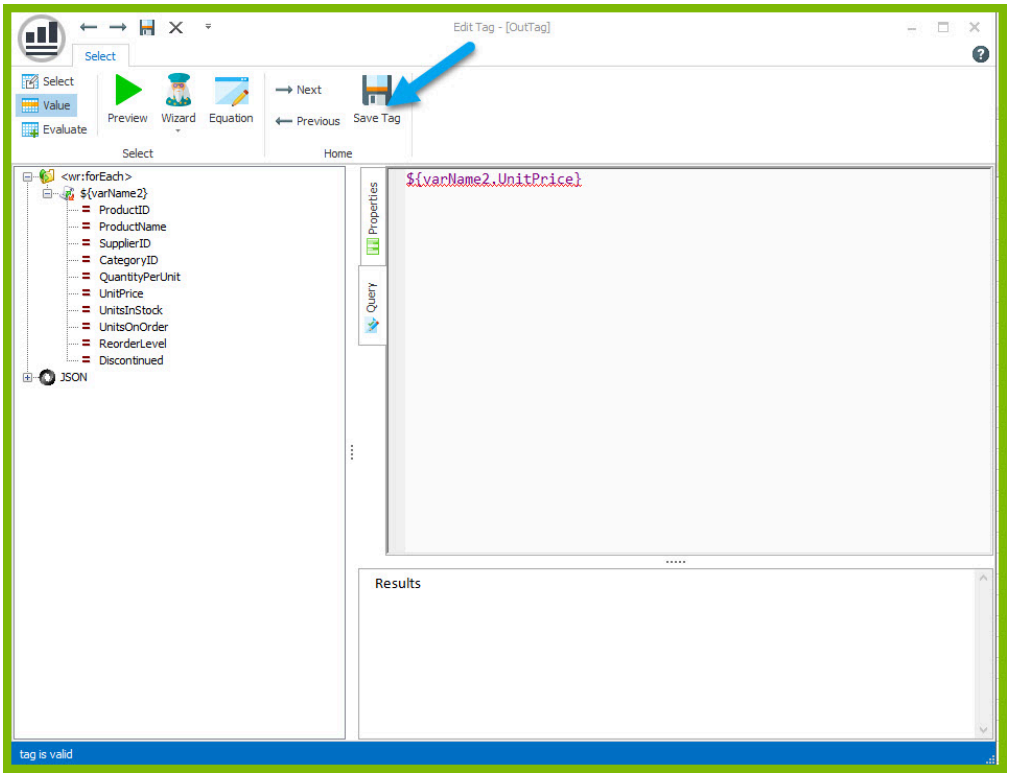
12. Open the tag Editor by placing your cursor on the cell containing the Out tag and clicking "**Edit Tag.**"



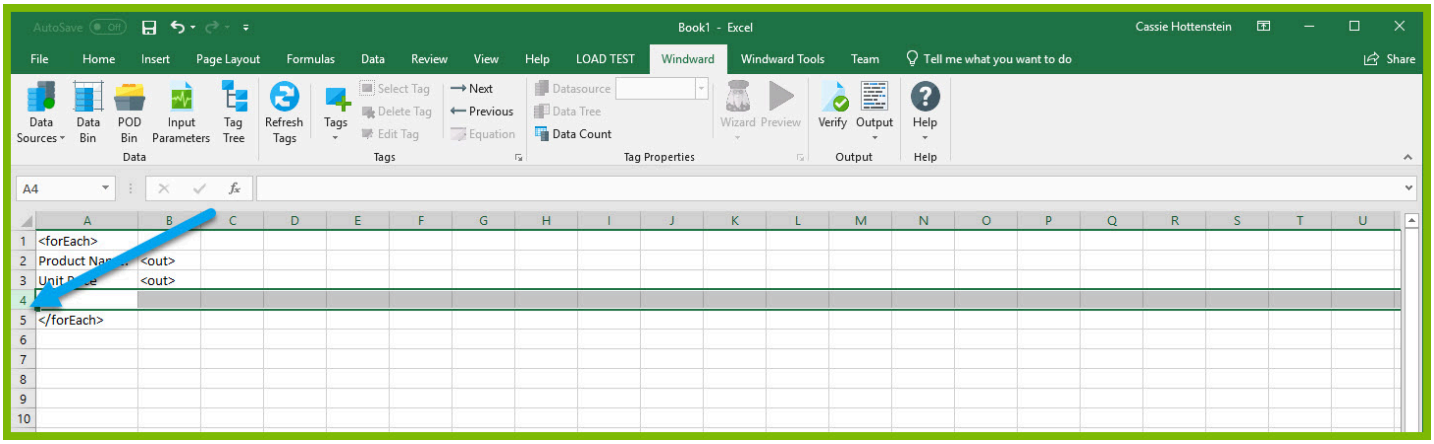
13. You can now see your ForEach variable in the tag editor since the Out tag occurs in the template between the ForEach tag and the EndForEach tag. Expand <wr:forEach> -> ${varName1} and double click **UnitPrice**. This automatically queries the UnitPrice currently held by the ForEach tag.



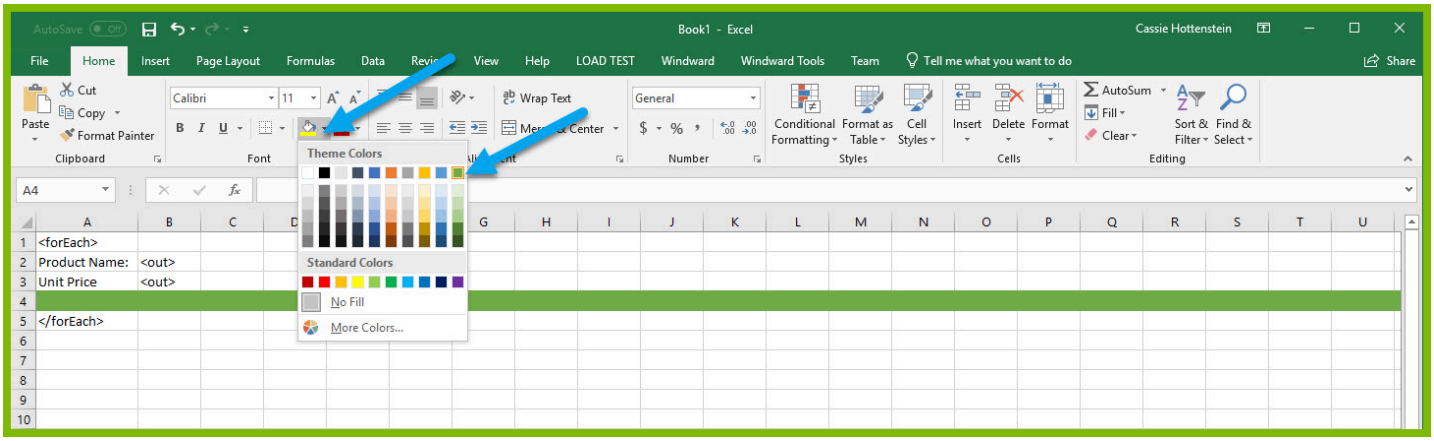
14. Click the "**Save Tag**" button to save your tag's query.



15. Finally, you are going to add some indicator between each product so you can easily distinguish between them in your output. Click on the 4th row on the sidebar to select the entire row.



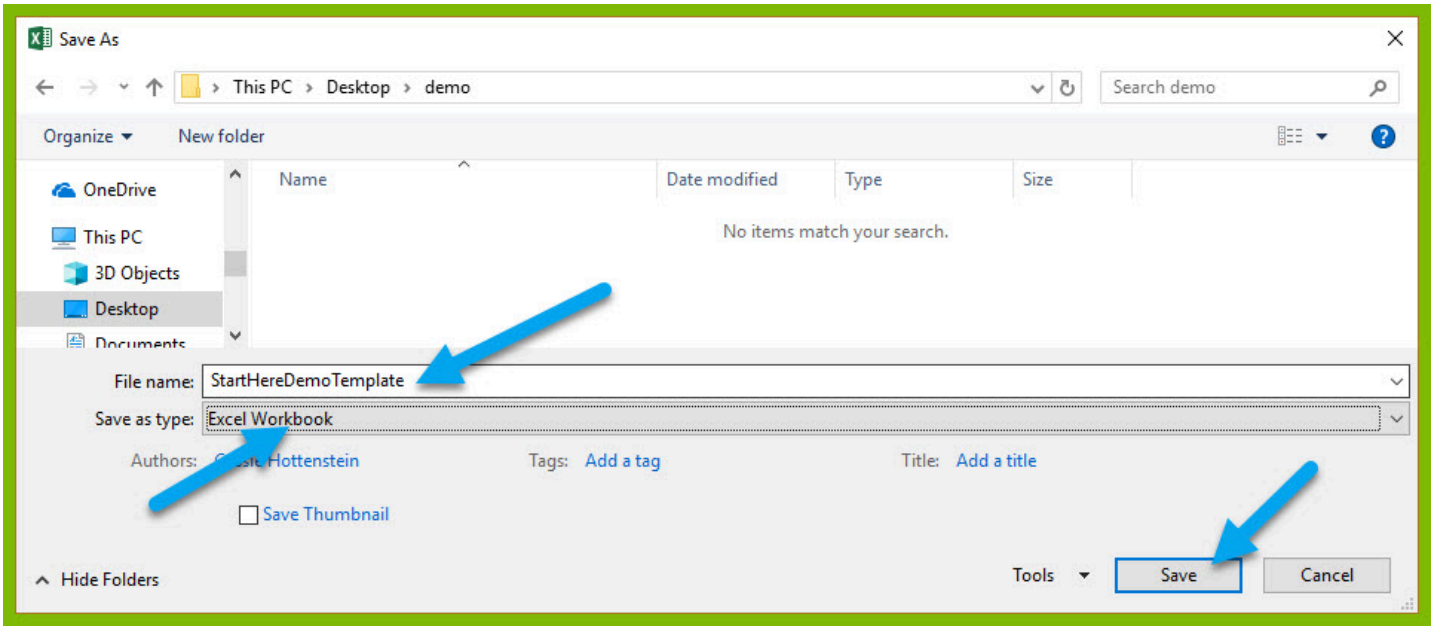
16. Select any fill color for the row so that you will be able to differentiate between each product.



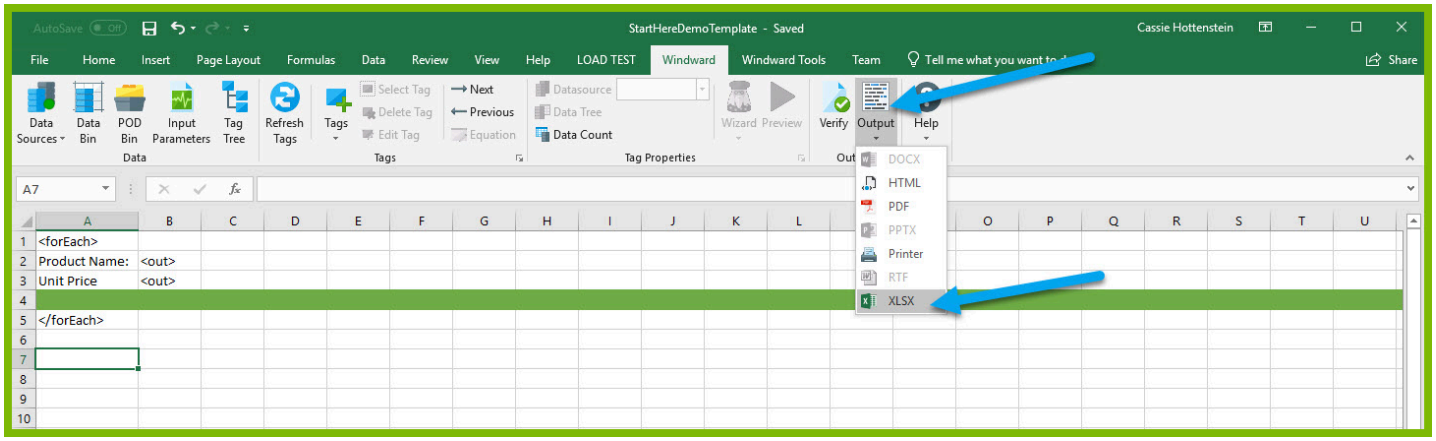
Now you are all finished with your template design!

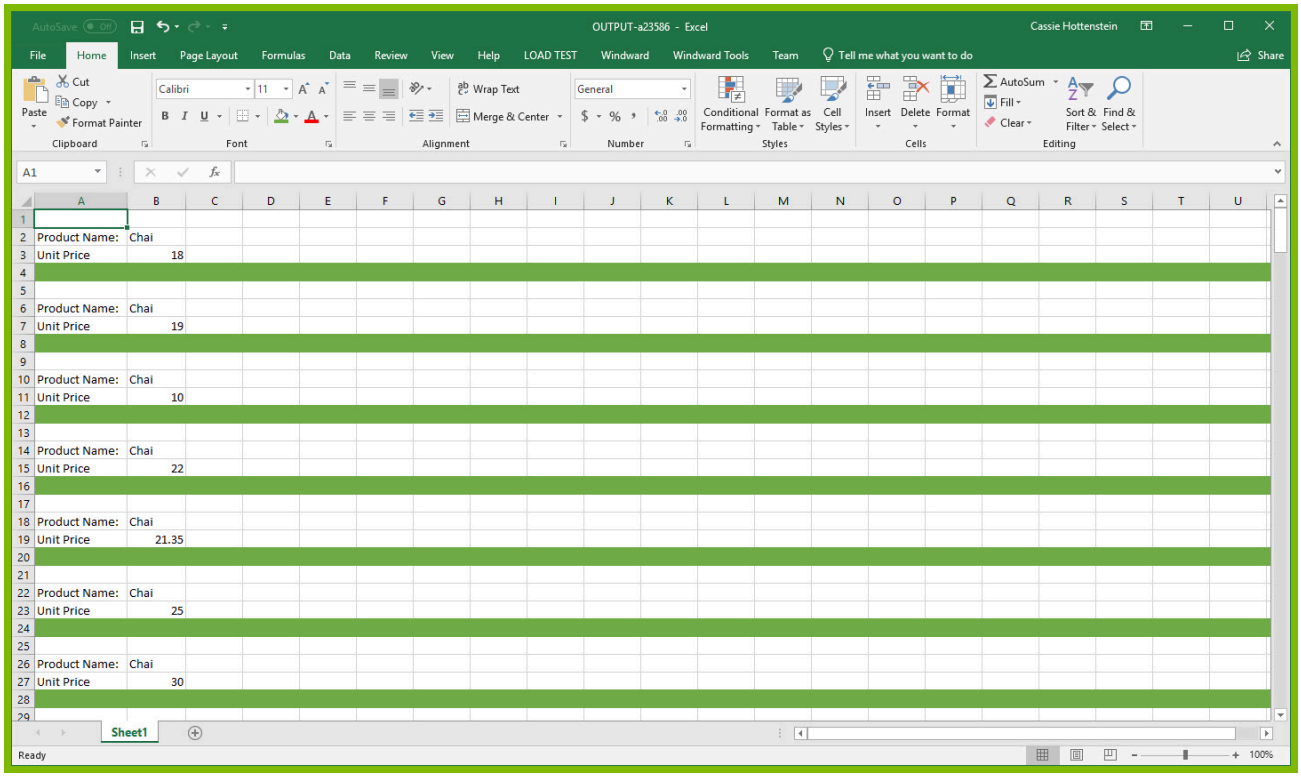
Step 4: Output

1. Save your template. You can save your template to anywhere you want on your machine and give it any name you want. Be sure to save it as a ".xlsx" document.



2. In the "Windward" tab, click the "**Output**" button and from the drop down select "**XLSX**."





Your template will output, and you should see a list of product names and their unit price with each product separated by a filled row in the excel sheet.

Congratulations! You have created your first template in Windward Designer and produced your first output!

Next Steps

Now that you have finished this introduction tutorial, here are some resources we recommend you visit next:

1. How to connect to JSON datasources
2. How to use the XPath Wizard
3. The Windward Tutor: A collection of short video tutorials

4. Creating an Invoice in Windward Designer

Creating a Template in Excel with SQL Data

Training Guide

Welcome to Windward Designer

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Step 1 - Install

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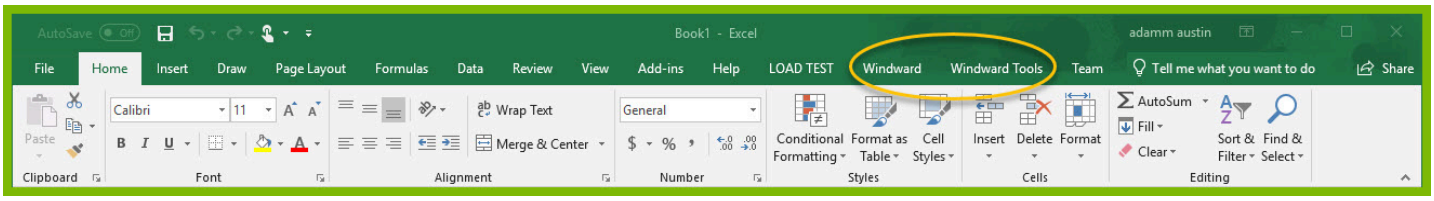
If you already have a license key, please visit the downloads page to install the software.

Or start a free 14-day trial!

Step 2 - Connect to Data

In this training guide, you are connecting to a sample SQL Datasource provided by Windward. To connect to the sample data:

1. Open Microsoft Excel. Now that you've installed Windward Designer, you will see two new tabs in the Microsoft Office Ribbon – the "**Windward**" Tab and the "**Windward Tools**" Tab.



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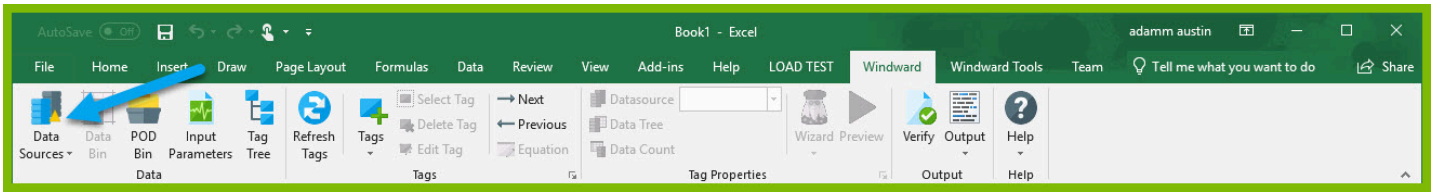
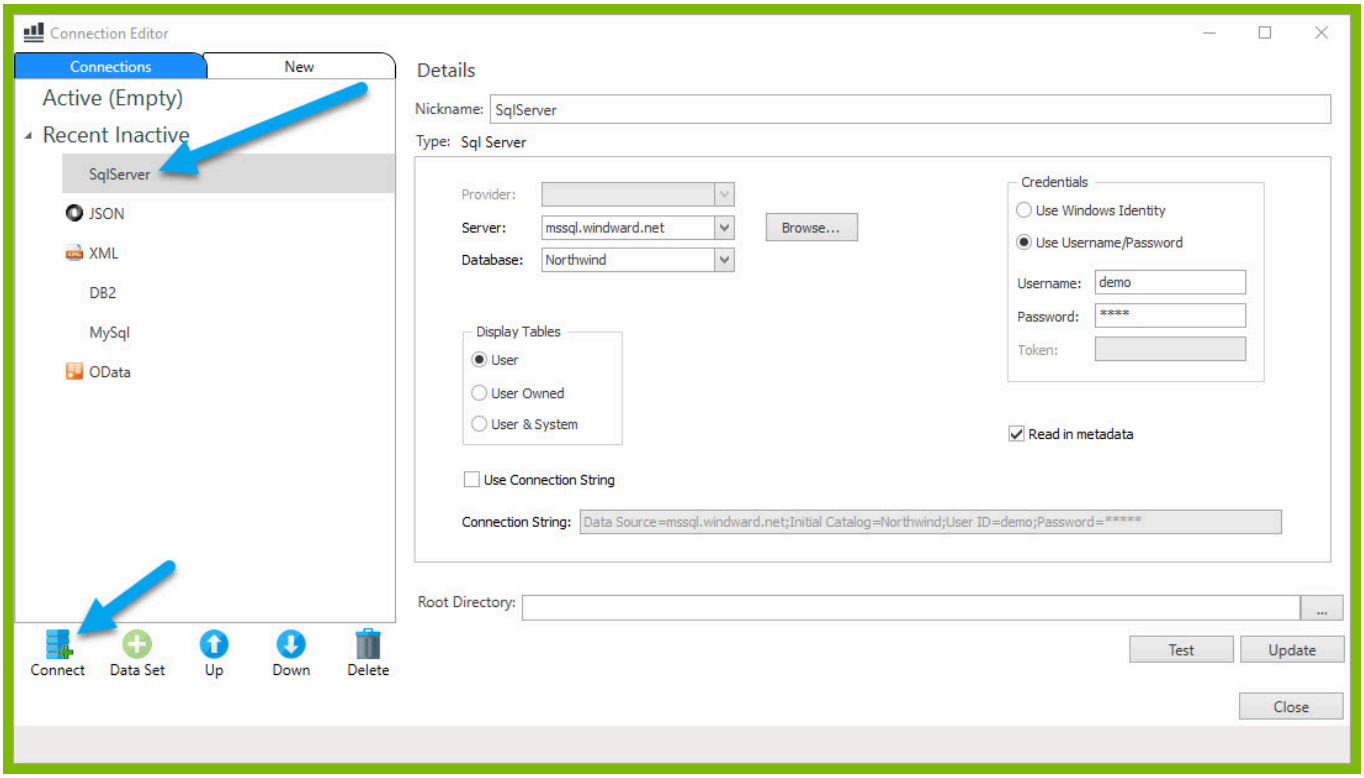
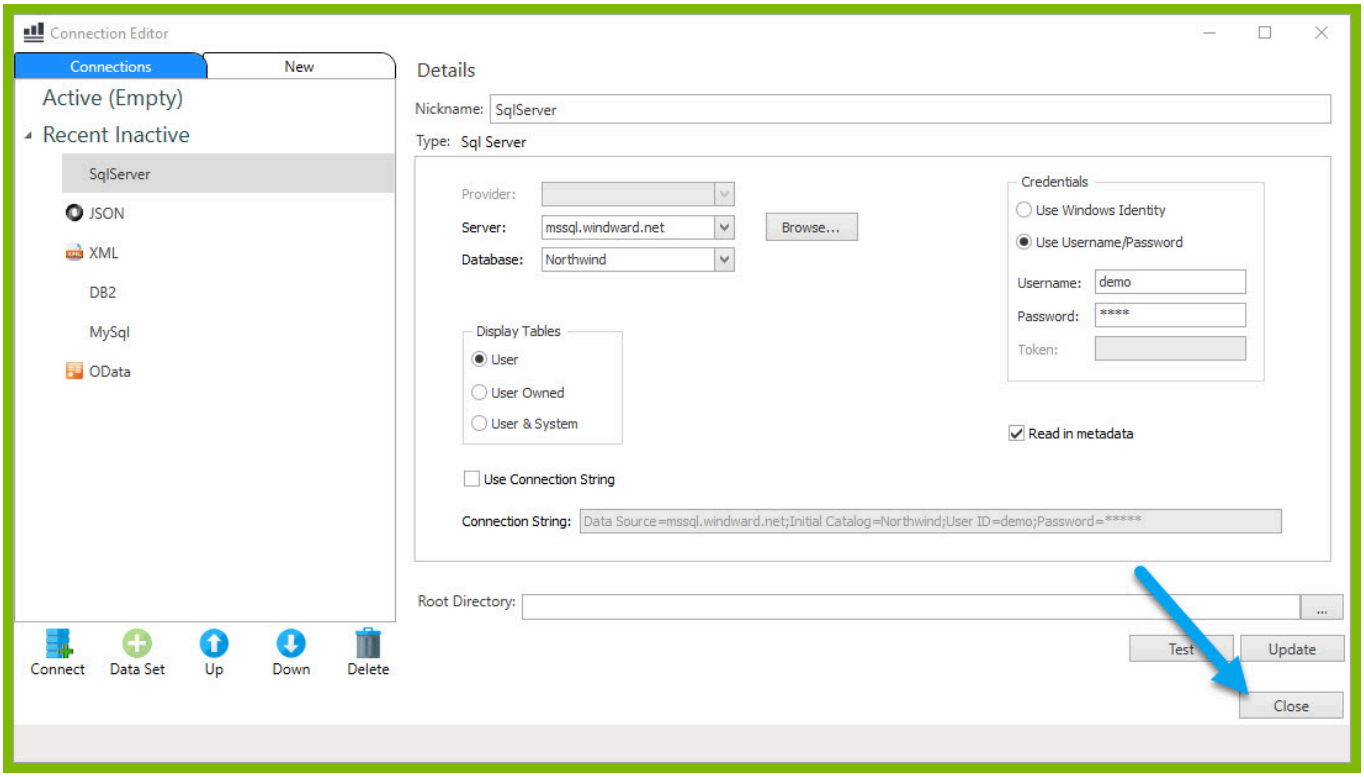


3. In the Connection Editor window, select the data connection labeled "**SqlServer**" under "Recent Inactive" and click the "**Connect**" button.



4. Close the Connection Editor by clicking "**Close.**" You have now successfully connected to the sample data!



Step 3 - Design Your Template & Insert Your Data

In this training guide, you will build a very basic template to get the feel of Windward Designer. While your final product may not seem very impressive, you will learn the basic skills to making any template! You will make a template which will output the product name and unit price for every product in the sample data, with each product separated by a line.

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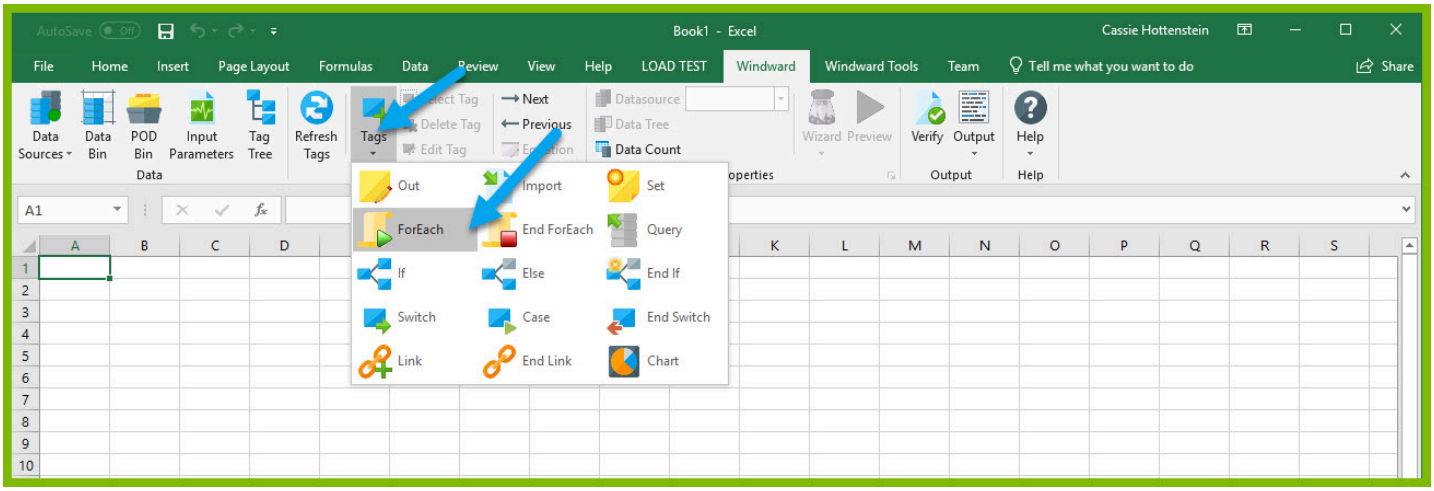
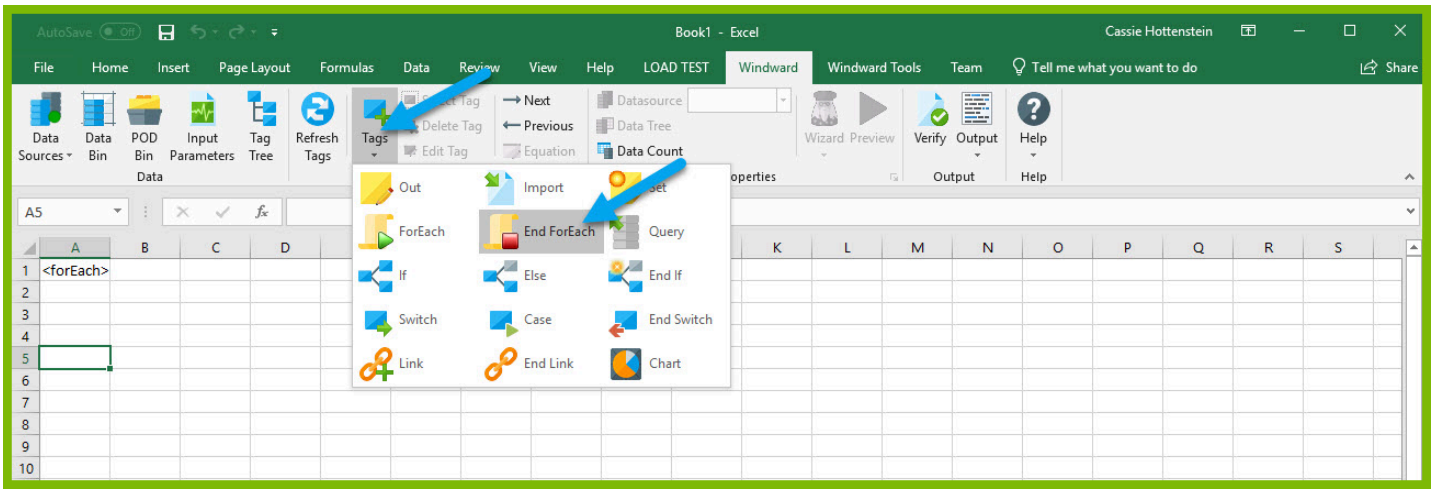
1. Make sure your cursor is placed on cell A1. To place a ForEach tag, expand the drop down under the button "**Tags**" in the Windward ribbon and click "**ForEach**."

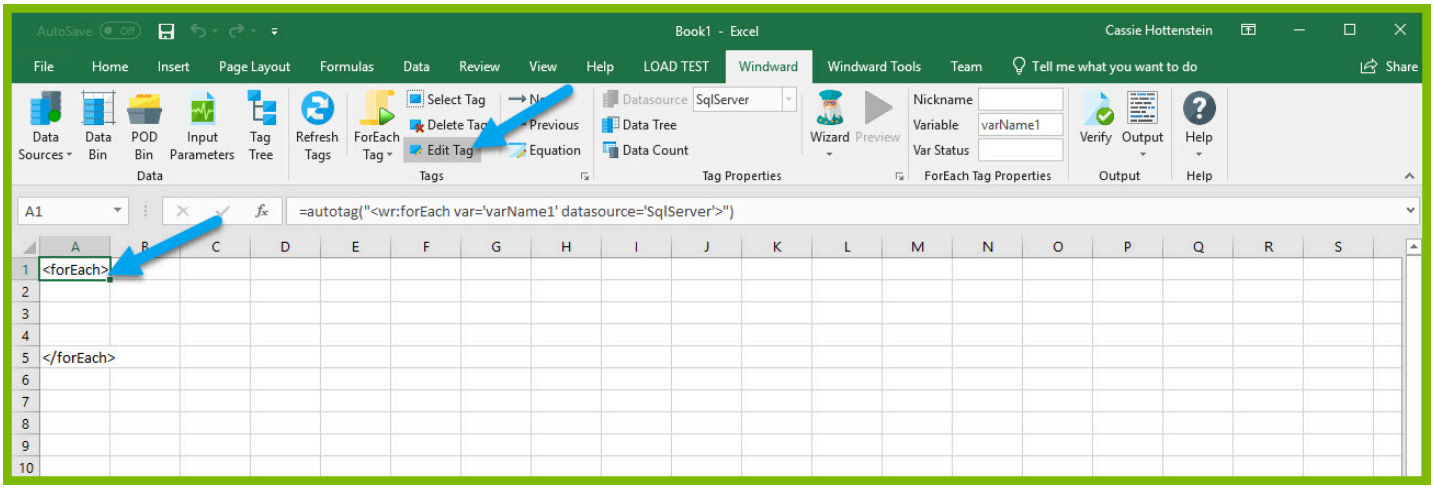


2. Place your cursor on cell A5, expand the drop down under the button "**Tags**" in the Windward ribbon, and click "**EndForEach**" to place a closing tag for the ForEach tag.

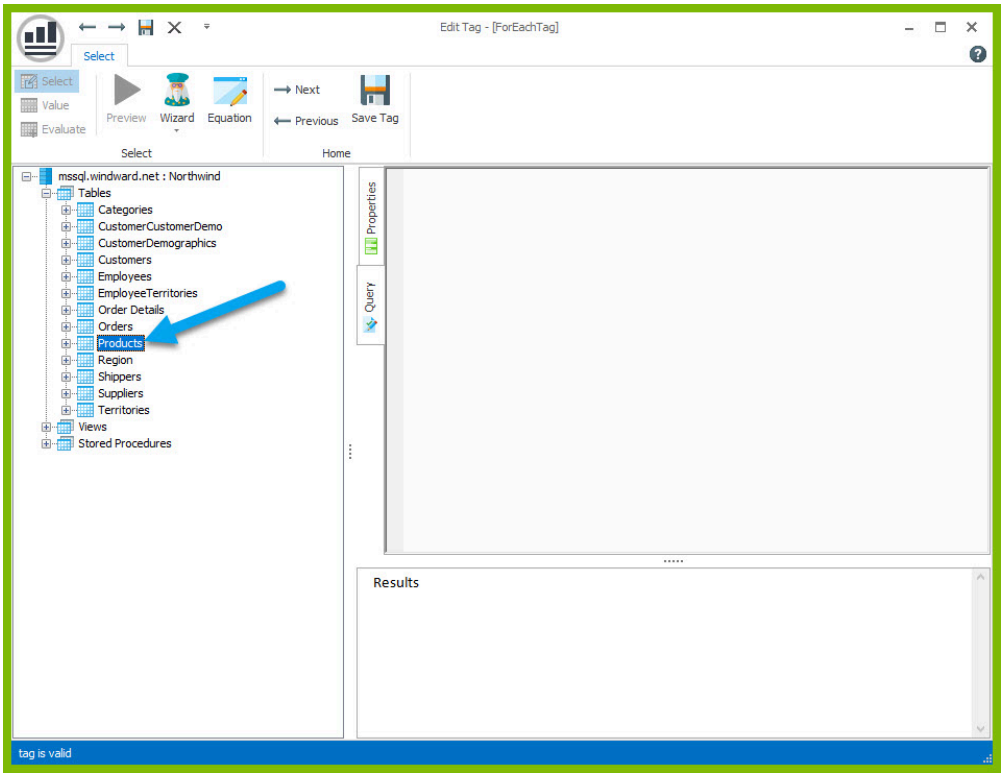


Now all of the content that you place between the ForEach and EndForEach tags will be generated once for each record returned by the ForEach tag's select.

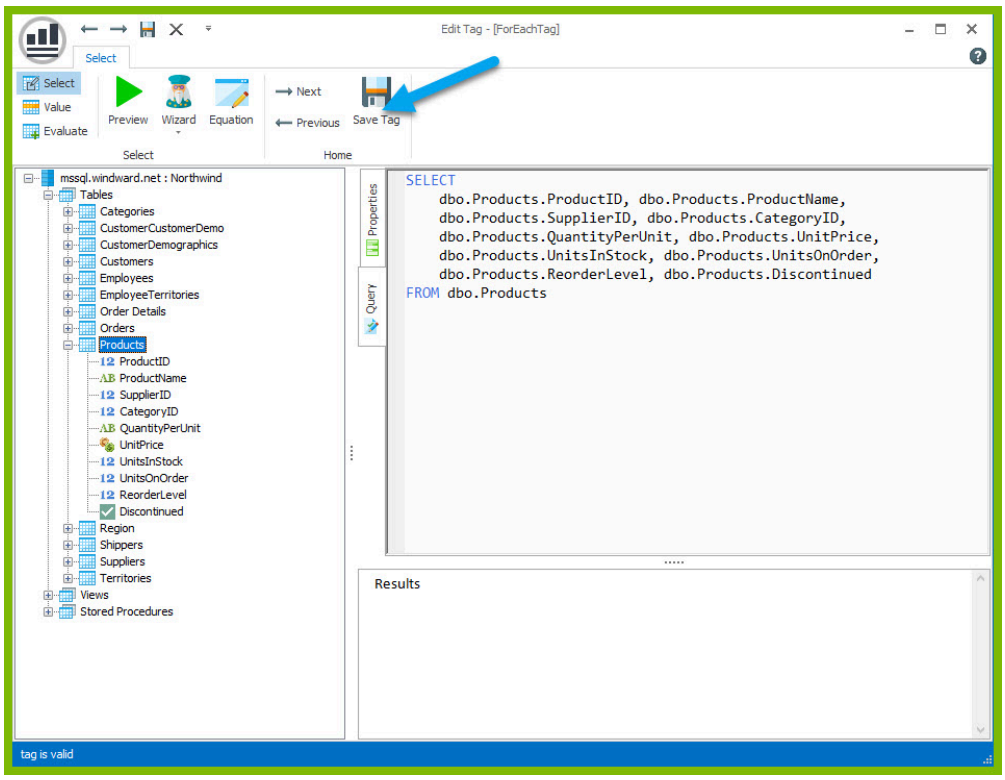
3. For the ForEach tag, you will select the Product node so that you can output information on each product. You can use the Tag Editor to easily create a query for your tag. Place your cursor on the A1 cell containing the ForEach tag that was inserted in your template and click the "**Edit Tag**" button in the Windward ribbon to open the Tag Editor.



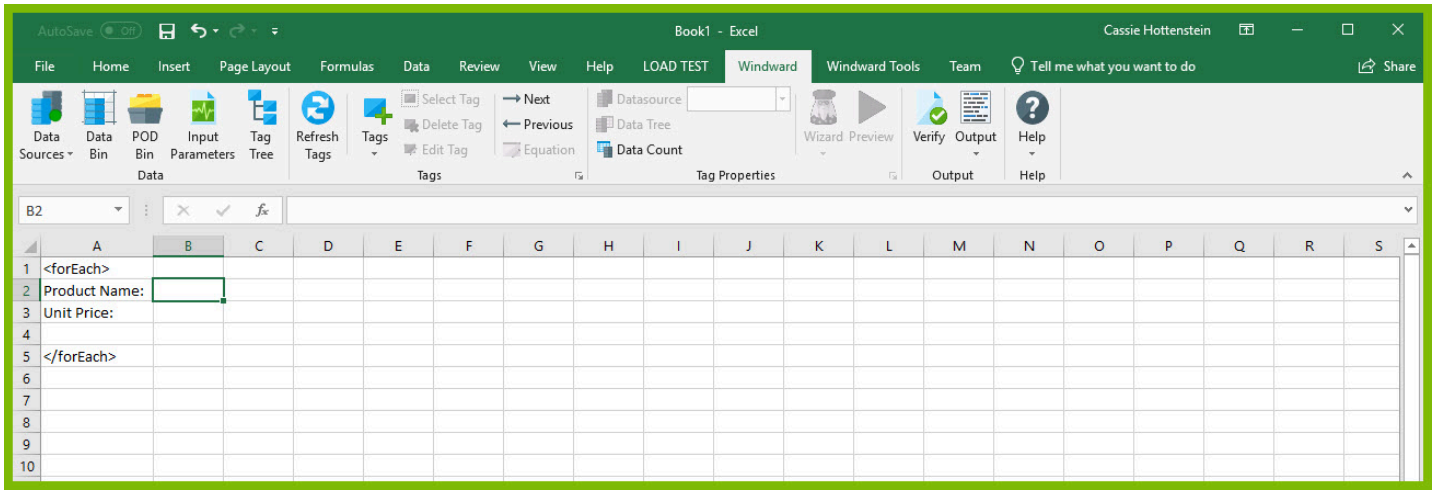
4. In the Tag Tree, expand the node mssql.windward.net : Northwind -> Tables -> and double-click the "**Products**" table. This will automatically write a select for the Products table.



5. Click the "**Save Tag**" button. Congratulations! You have just inserted your first tag into your template!



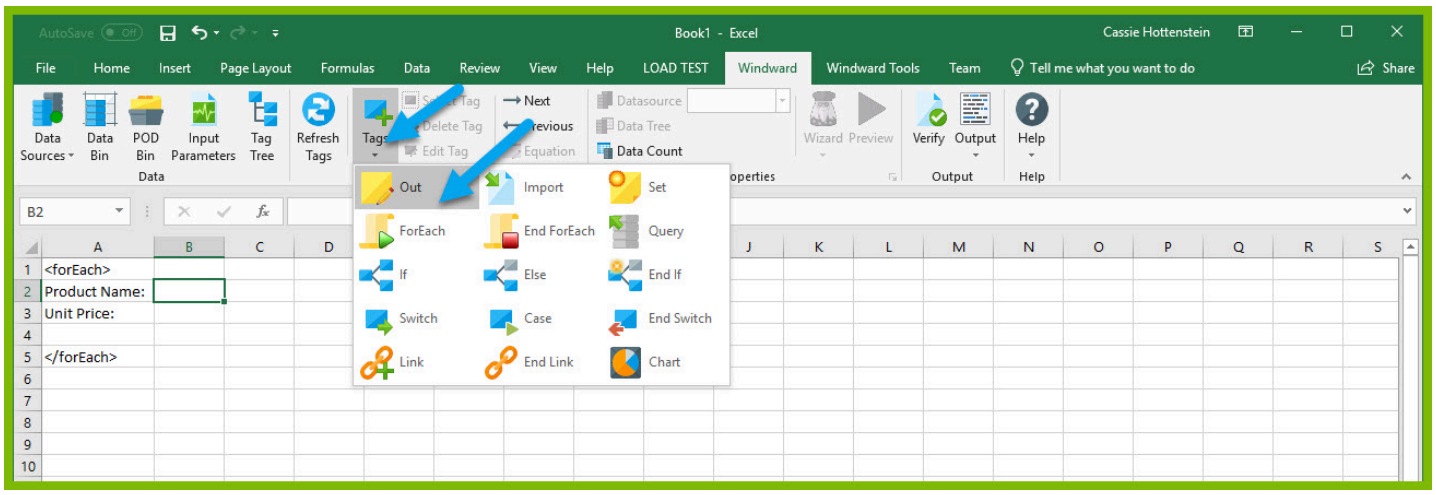
6. In the next cell after the ForEach tag, enter the text “Product Name:” and in the next cell “Unit Price:”



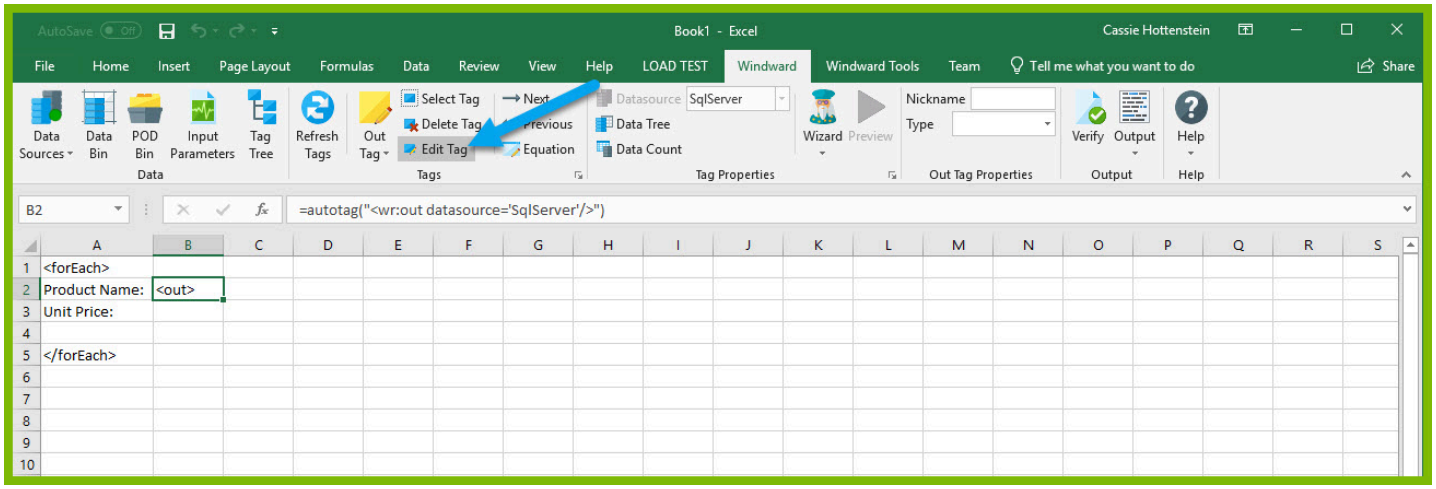
The “Product Name:” and “Unit Price” text will be output for every product returned by your ForEach tag’s select.

Out tags will be used to insert data into your final report. These tags will output the Product Name and Unit Price for each product after these labels.

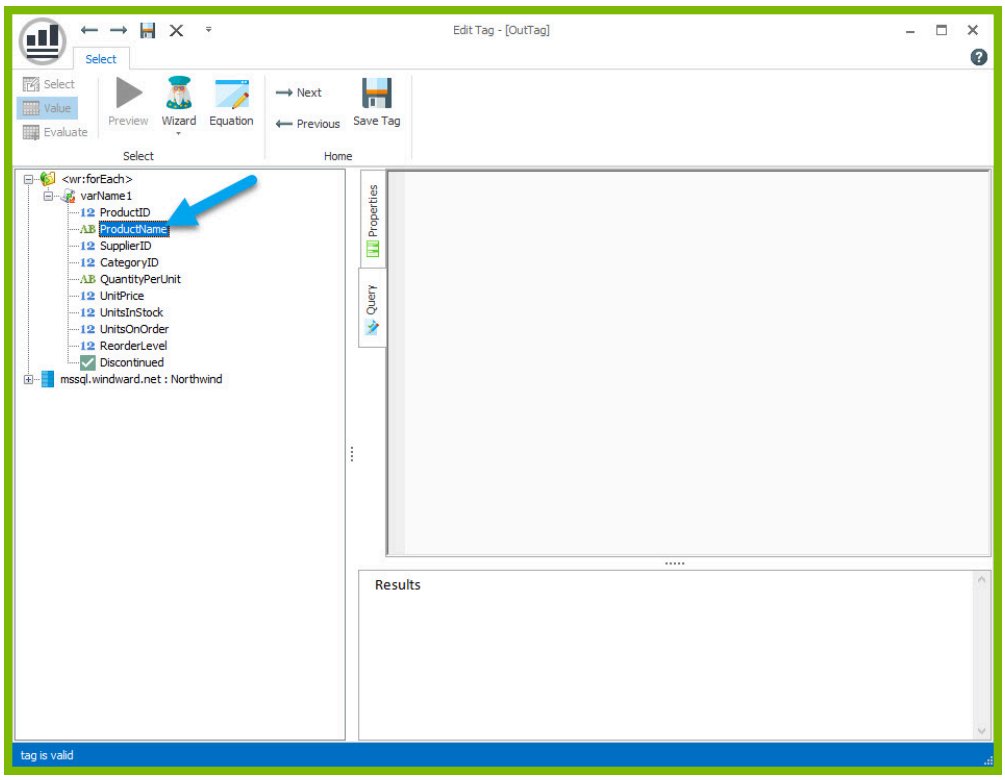
7. Place your cursor in the cell to the right of the “Product Name:” text, and click “**Tags**” in the Windward ribbon and click “**Out.**” This places an Out tag in the cell.



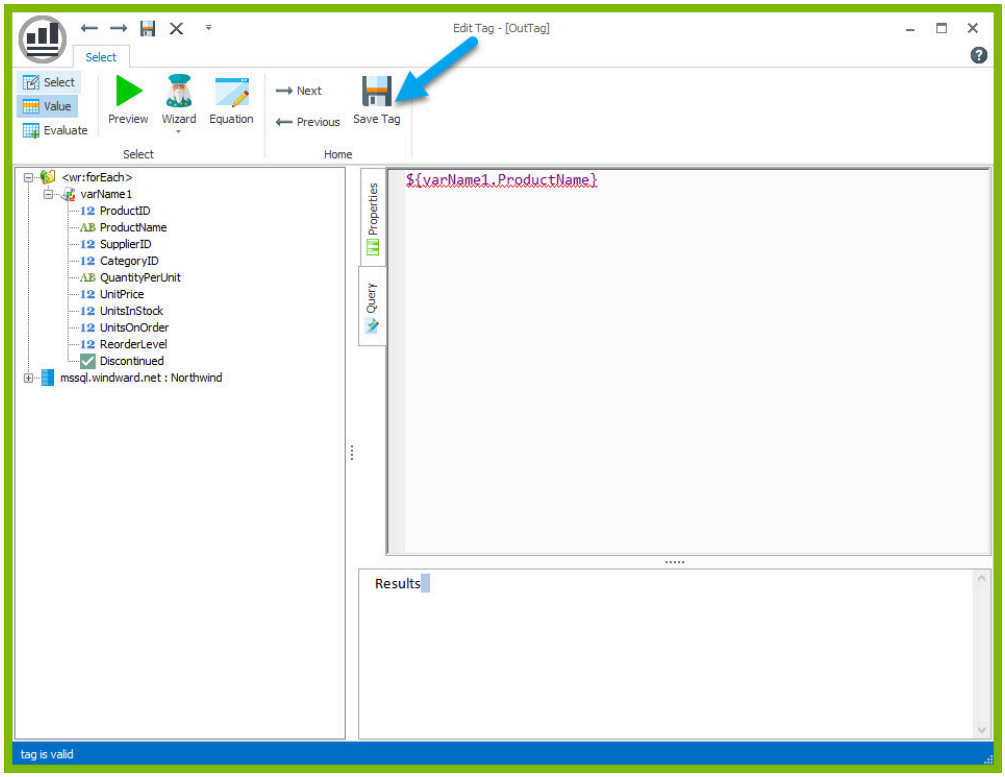
8. Open the tag Editor by placing your cursor on the cell containing the Out tag and clicking "Edit Tag."



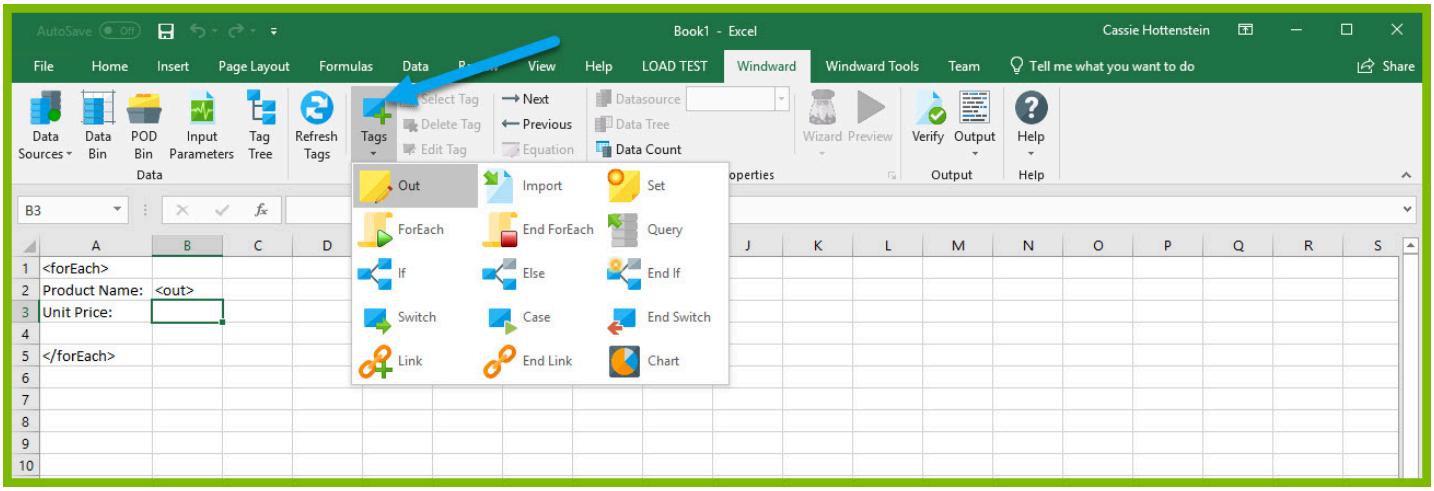
9. You can now see your ForEach variable in the tag editor since the Out tag occurs in the template between the ForEach tag and the EndForEach tag. In the Tag Tree, expand <wr:forEach> -> varName1 and double-click **ProductName**. This automatically queries the ProductName currently held by the ForEach variable.



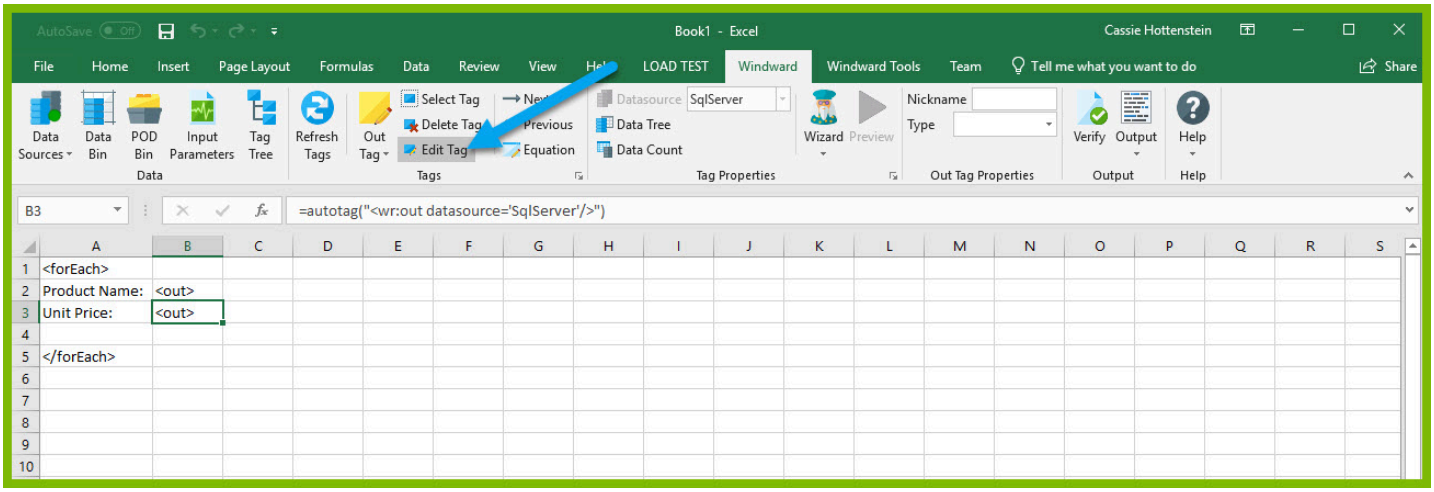
10. Click the "**Save Tag**" button to save your tag's query.



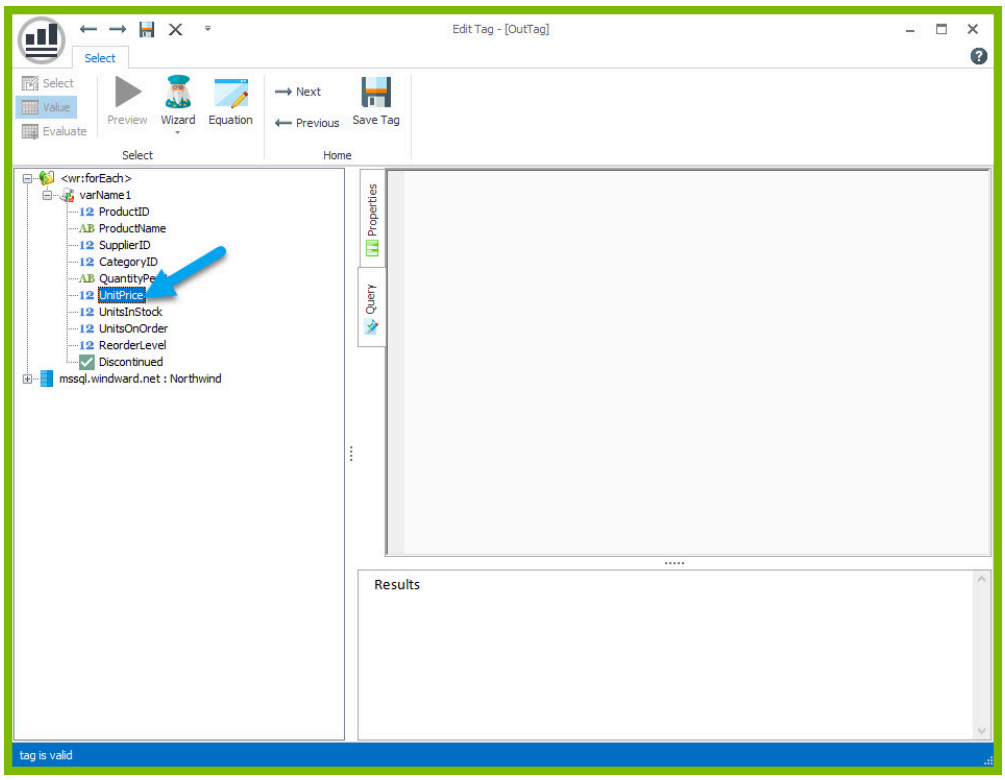
11. Place your cursor in the cell to the right of the "Unit Price:" text, and click "**Tags**" in the Windward ribbon and click "**Out.**" This places an Out tag in the cell.



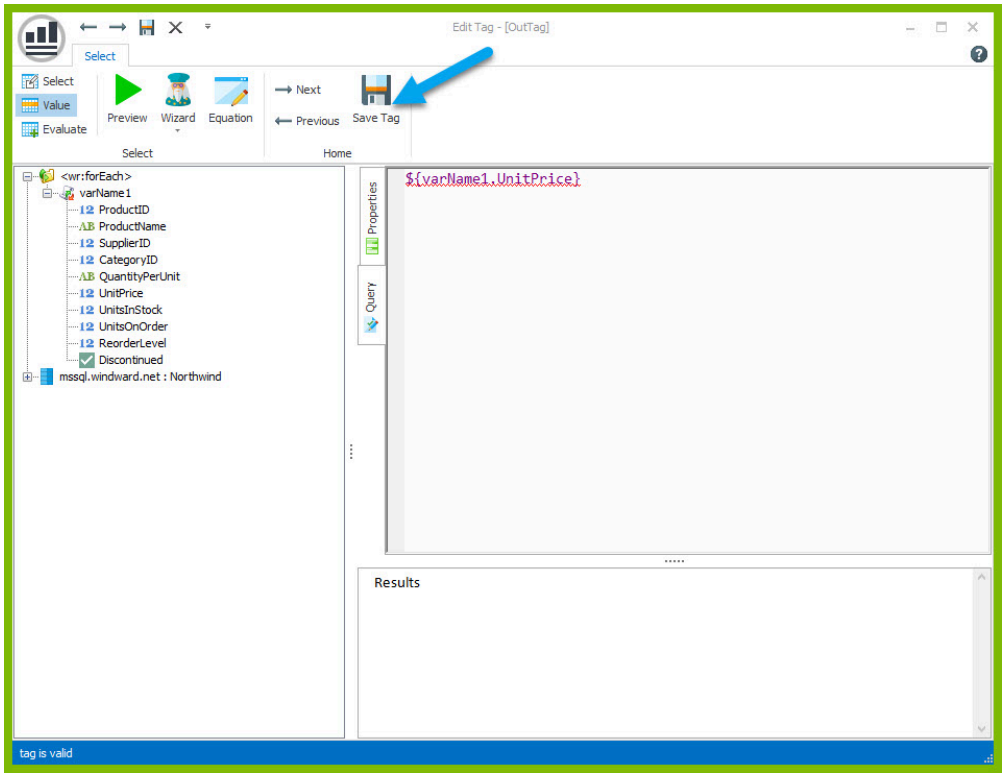
12. Open the tag Editor by placing your cursor on the cell containing the Out tag and clicking "**Edit Tag.**"



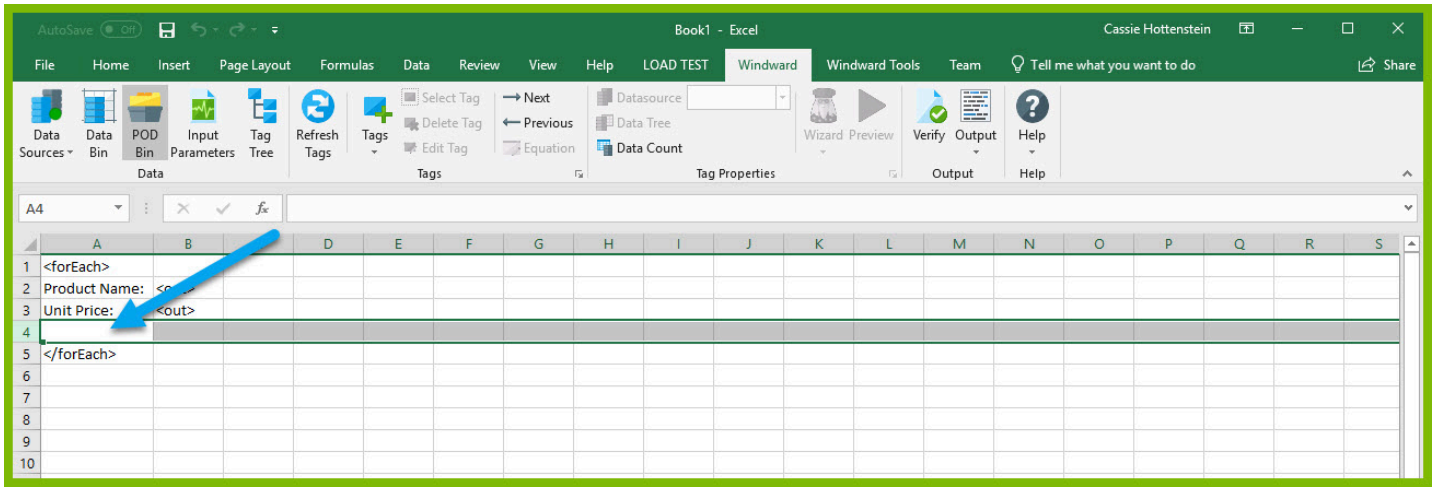
13. You can now see your ForEach variable in the tag editor since the Out tag occurs in the template between the ForEach tag and the EndForEach tag. Expand <wr:forEach> -> varName1 and double click **UnitPrice**. This automatically queries the UnitPrice currently held by the ForEach tag.



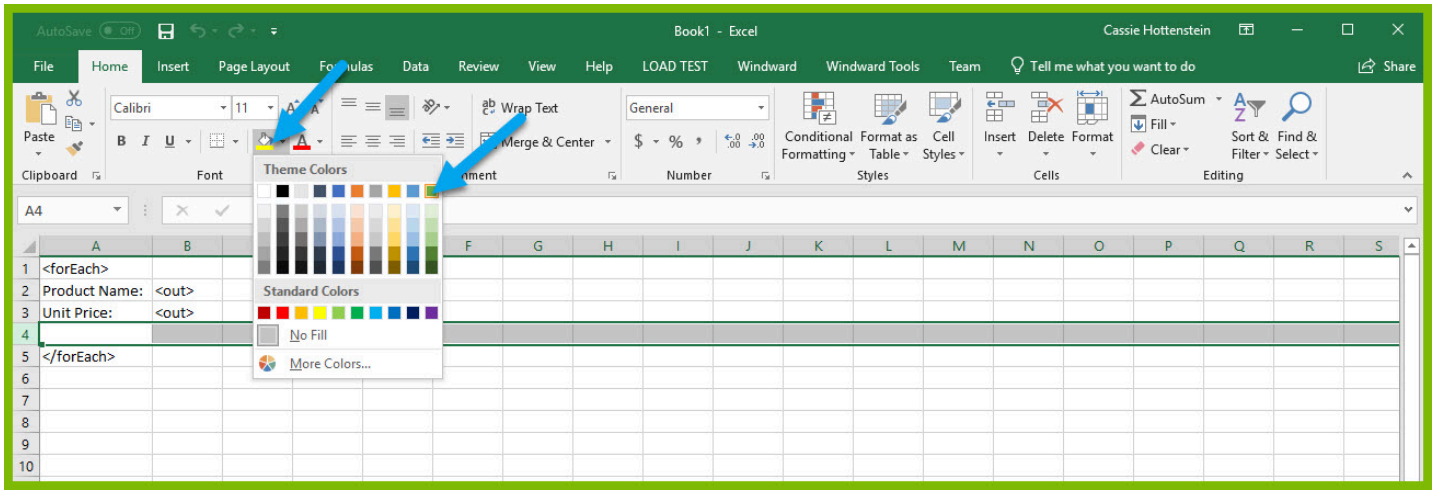
14. Click the "**Save Tag**" button to save your tag's query.



15. Finally, you are going to add some indicator between each product so you can easily distinguish between them in your output. Click on the 4th row on the sidebar to select the entire row.



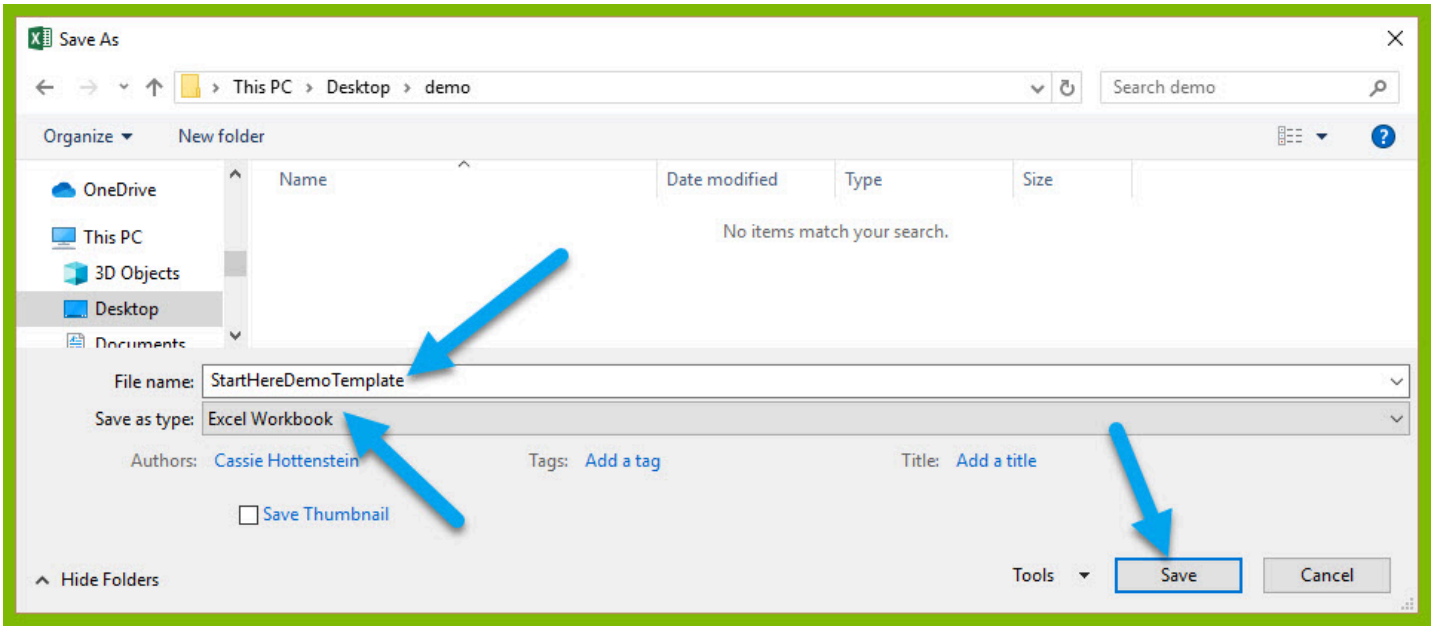
16. Select any fill color for the row so that you will be able to differentiate between each product.



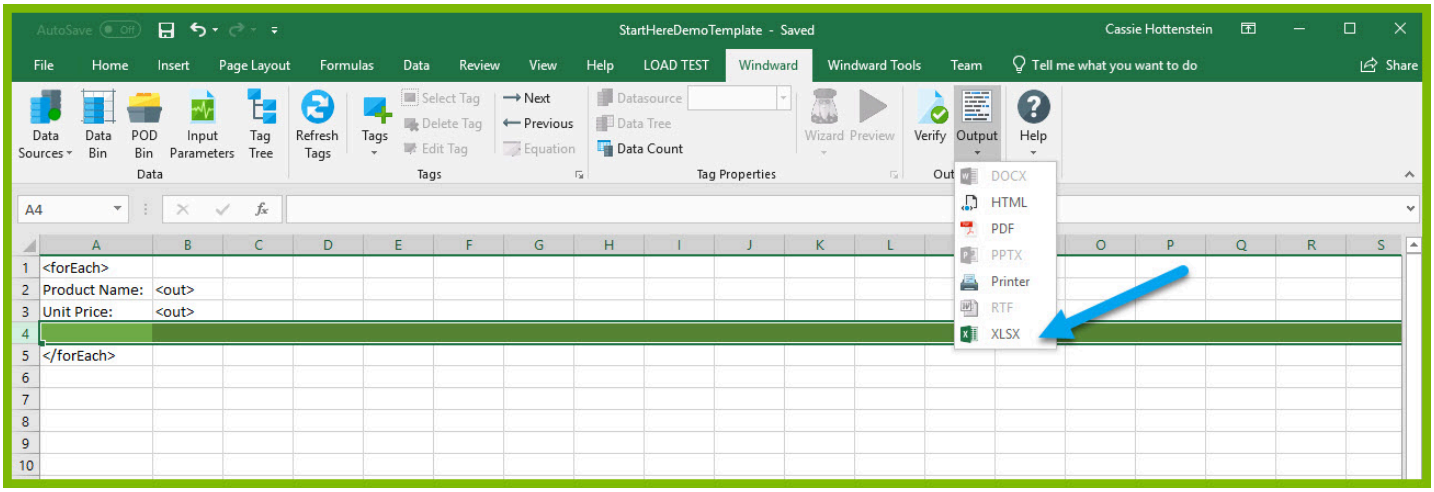
Now you are all finished with your template design!

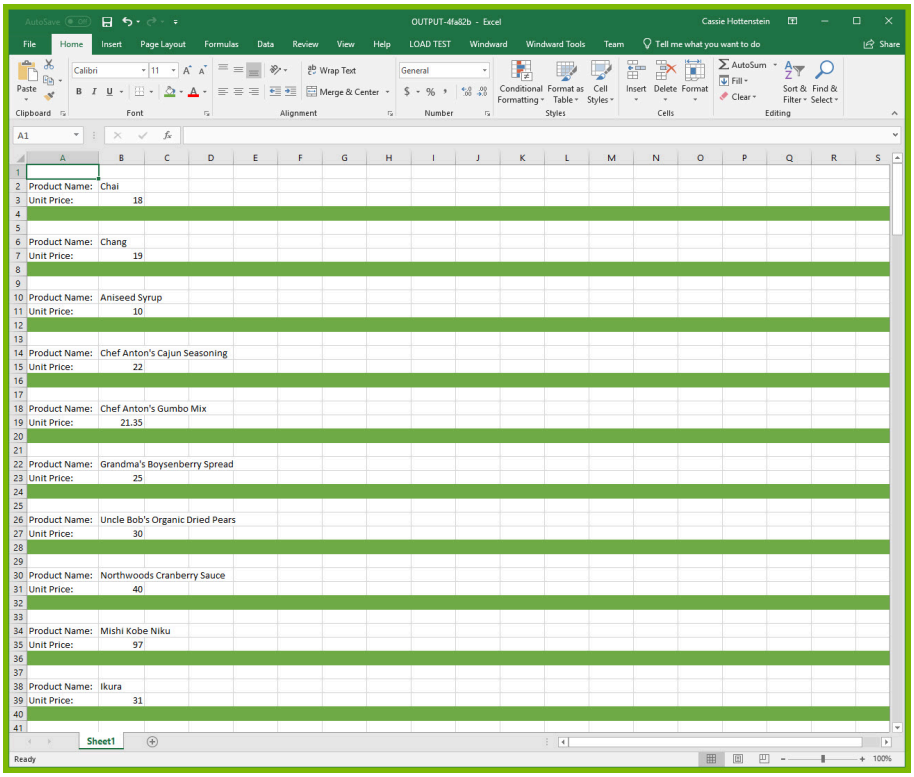
Step 4: Output

1. Save your template. You can save your template to anywhere you want on your machine and give it any name you want. Be sure to save it as a ".xlsx" document.



2. In the “Windward” tab, click the “**Output**” button and from the drop down select “**XLSX**.”





	A	B
1		
2	Product Name:	Chai
3	Unit Price:	18
4		
5		
6	Product Name:	Chang
7	Unit Price:	19
8		
9		
10	Product Name:	Aniseed Syrup
11	Unit Price:	10
12		
13		
14	Product Name:	Chef Anton's Cajun Seasoning
15	Unit Price:	22
16		
17		
18	Product Name:	Chef Anton's Gumbo Mix
19	Unit Price:	21.35
20		
21		
22	Product Name:	Grandma's Boysenberry Spread
23	Unit Price:	25
24		
25		
26	Product Name:	Uncle Bob's Organic Dried Pears
27	Unit Price:	30
28		
29		
30	Product Name:	Northwoods Cranberry Sauce
31	Unit Price:	40
32		
33		
34	Product Name:	Mishi Kobe Niku
35	Unit Price:	97
36		
37		
38	Product Name:	Ikura
39	Unit Price:	31
40		
41		

Your template will output, and you should see a list of product names and their unit price with each product separated by a filled row in the excel sheet.

Congratulations! You have created your first template in Windward Designer and produced your first output!

Next Steps

Now that you have finished this introduction tutorial, here are some resources we recommend you visit next:

1. How to connect to SQL datasources
2. How to use the XPath Wizard
3. The Windward Tutor: A collection of short video tutorials
4. Creating an Invoice in Windward Designer

Creating a Template in Excel with XML Data

Training Guide

Welcome to Windward Designer

Windward Studios takes a unique approach to reporting. Our Report Designer sits directly inside Microsoft Office which means you get to use a familiar and powerful tool without having to learn a new designer. If you've ever used one of our competitors' products, you may be familiar with their modular designers that require you to build reports using bits and pieces, where every bit of text or every piece of data is a distinct object in your template. Windward changes all of that. With Windward in Microsoft Office, you design report templates just like you design any other document, utilizing **Tags** to insert your data wherever you need it seamlessly in-line with your other text and content.

Training Overview

This Training Guide walks you through the fundamental steps you need to begin designing templates with Windward Designer in Microsoft Word using an XML Datasource.

The Four Steps to Windward:

1. Install
2. Connect to data
3. Design your template & insert your data
4. Output

Step 1 - Install

To get started, you need to install the Designer. If you have it already installed, please skip this step!

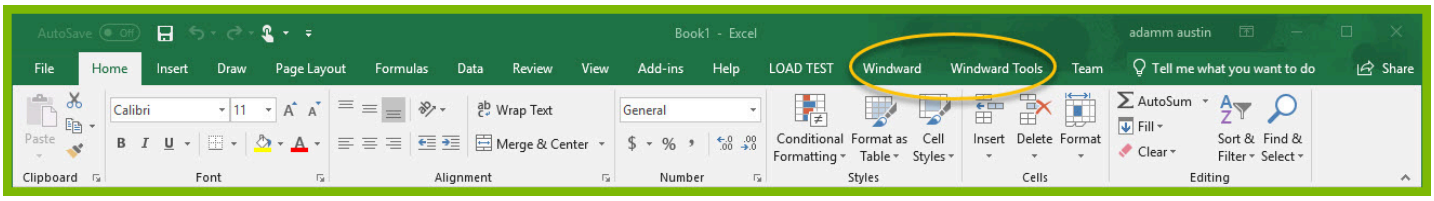
If you already have a license key, please visit the downloads page to install the software.

Or start a free 14-day trial!

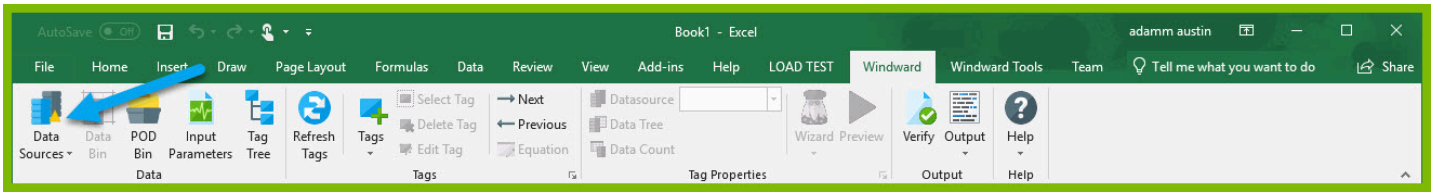
Step 2 - Connect to Data

In this training guide, you are connecting to a sample XML Datasource provided by Windward. To connect to the sample data:

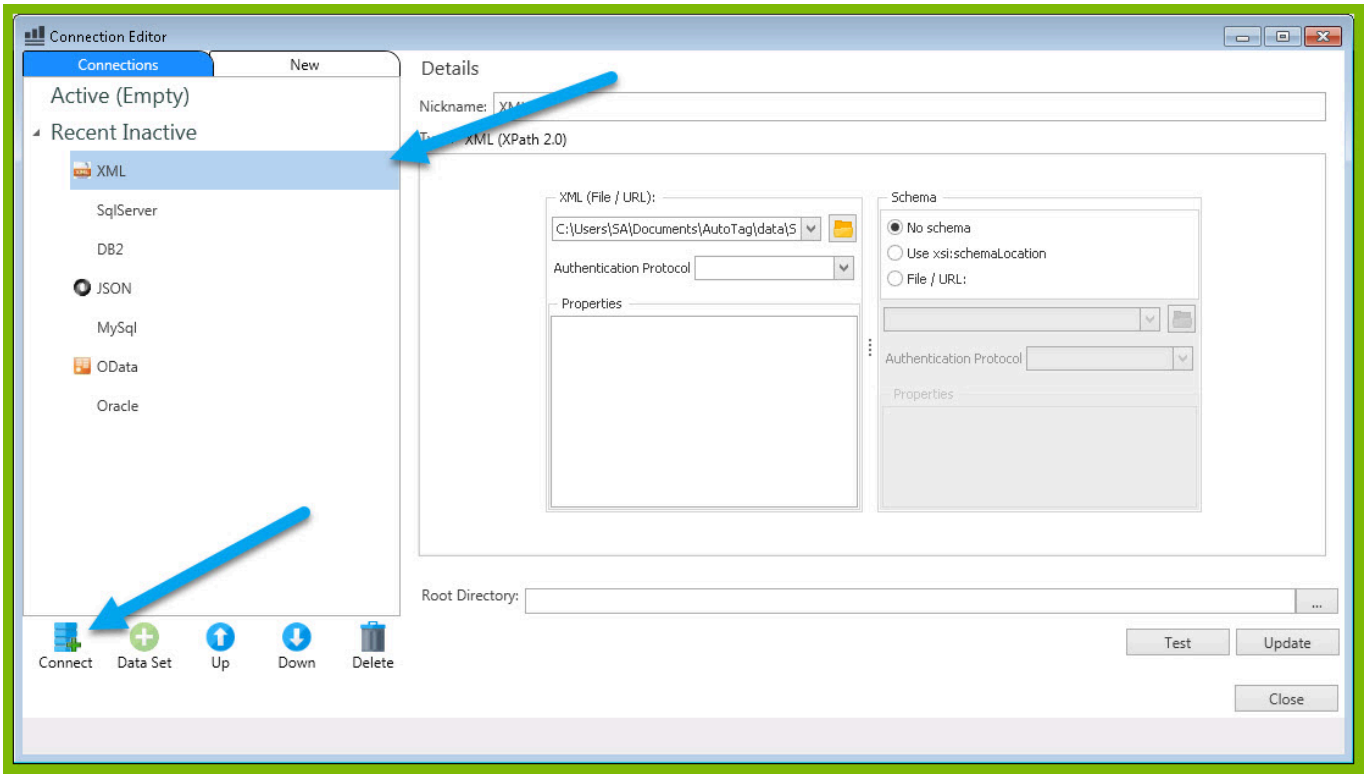
1. Open Microsoft Excel. Now that you've installed Windward Designer, you will see two new tabs in the Microsoft Office Ribbon – the "**Windward**" Tab and the "**Windward Tools**" Tab.



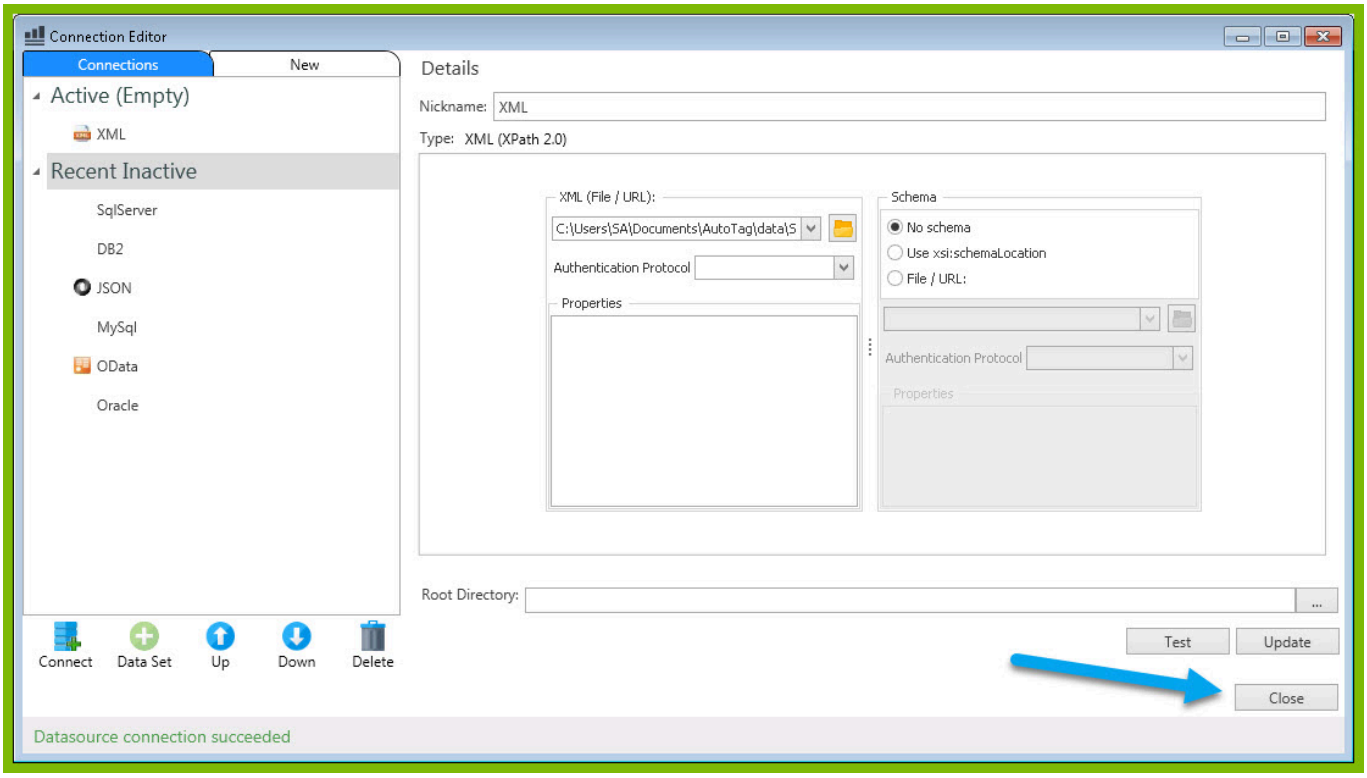
2. Click on the "Windward Tab" and click on the "**Data Sources**" button located on the left-hand side of the ribbon. This opens the Connection Editor where you will manage all of your data connections. (Alternatively, you can click on the lower half of the button to expand the drop down and then click **"Data Sources."**)



3. In the Connection Editor window, select the data connection labeled "**XML**" under "Recent Inactive" and click the "**Connect**" button.



4. Close the Connection Editor by clicking "**Close.**" You have now successfully connected to the sample data!

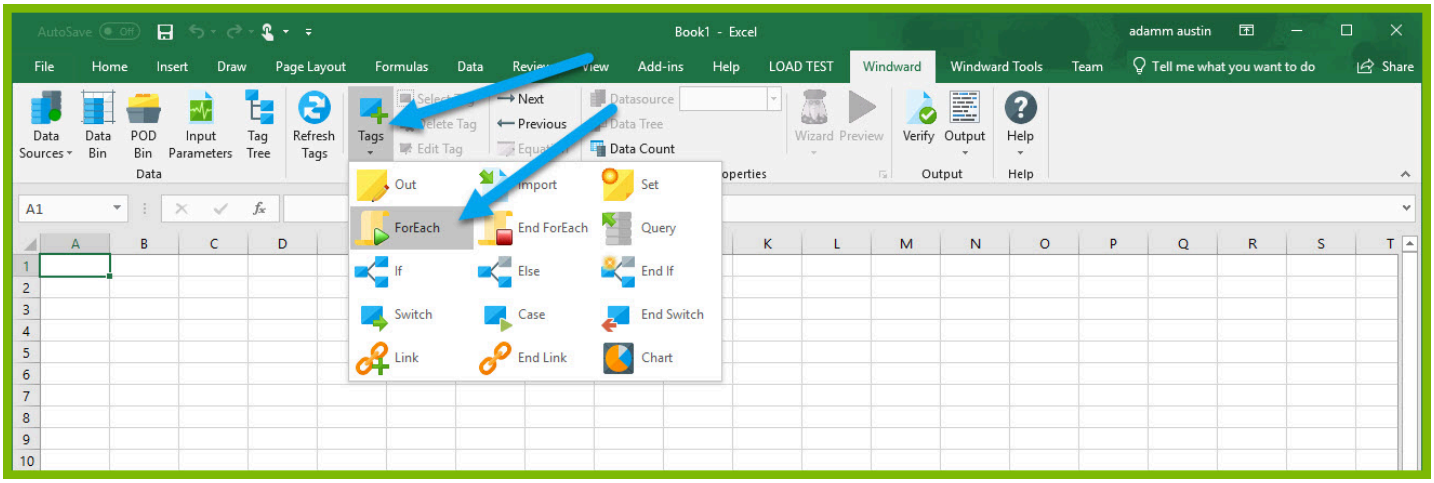


Step 3 - Design Your Template & Insert Your Data

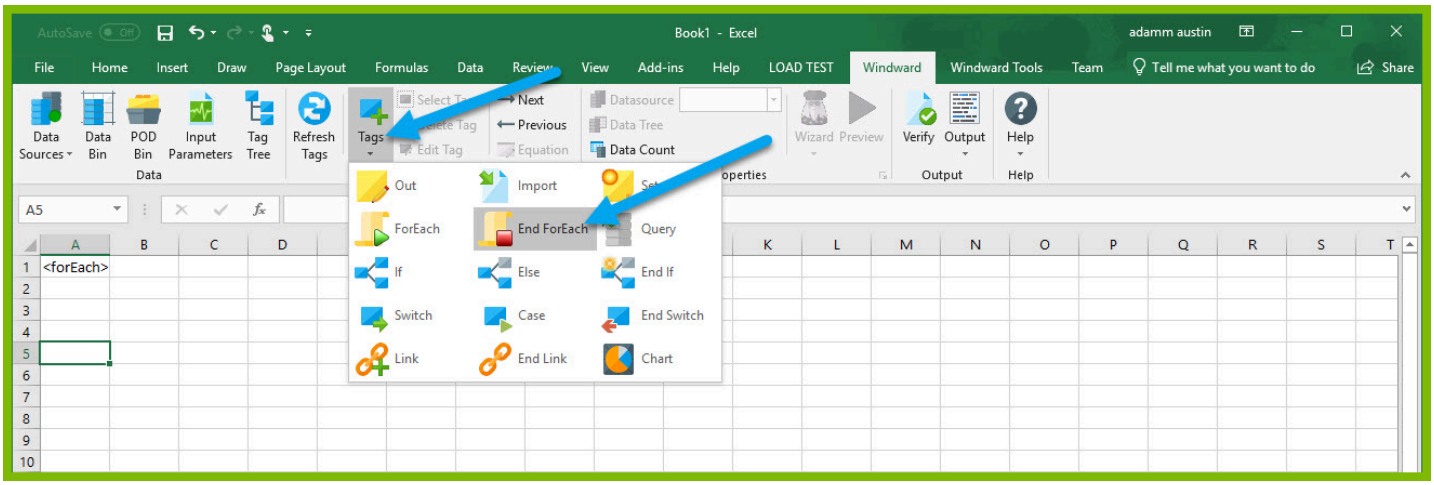
In this training guide, you will build a very basic template to get the feel of Windward Designer. While your final product may not seem very impressive, you will learn the basic skills to making any template! You will make a template which will output the product name and unit price for every product in the sample data, with each product separated by a line.

In situations where you want to output many records returned from a select, you can use a ForEach tag. The ForEach tag will generate output once for each record returned by its select. The ForEach tag itself will not insert data into the template, but rather stores data in a variable that can be used by other tags to generate output.

1. Make sure your cursor is placed on cell A1. To place a ForEach tag, expand the drop down under the button "**Tags**" in the Windward ribbon and click "**ForEach**."

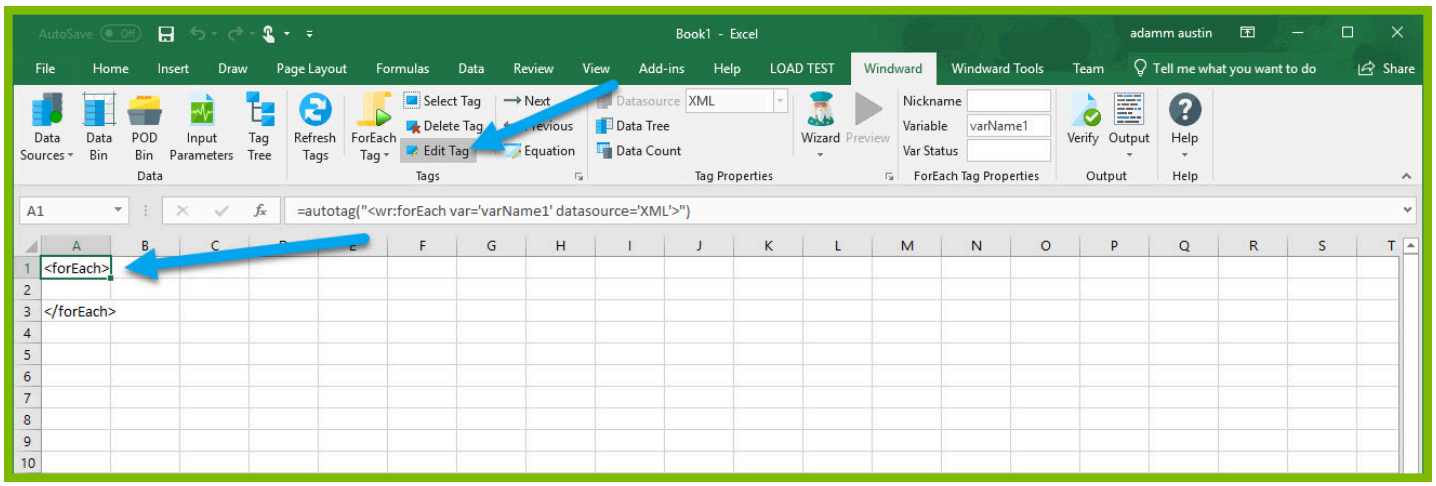


2. Place your cursor on cell A5, expand the drop down under the button "**Tags**" in the Windward ribbon, and click "**EndForEach**" to place a closing tag for the ForEach tag.

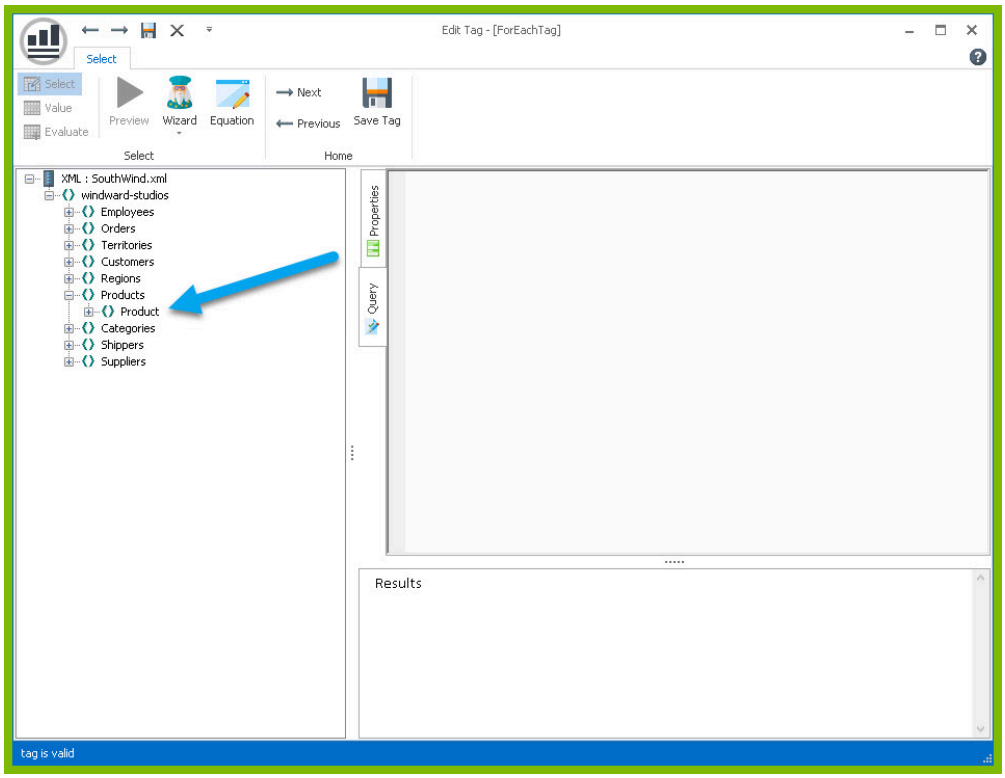


Now all of the content that you place between the ForEach and EndForEach tags will be generated once for each record returned by the ForEach tag's select.

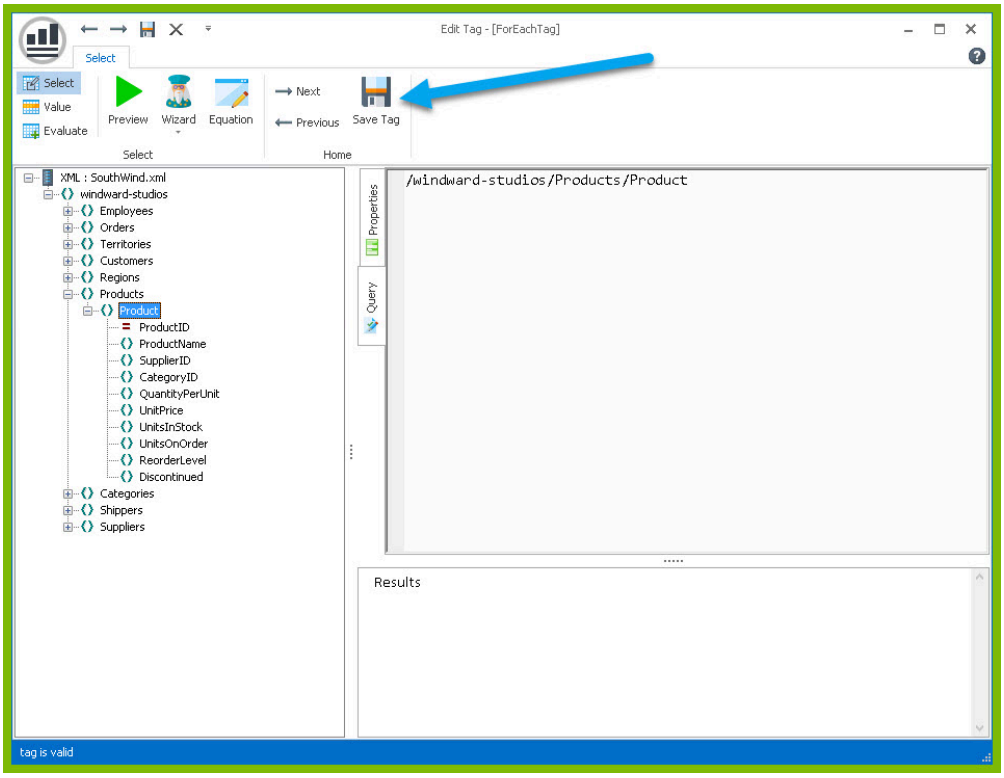
3. For the ForEach tag, you will select the Product node so that you can output information on each product. You can use the Tag Editor to easily create a query for your tag. Place your cursor on the A1 cell containing the ForEach tag that was inserted in your template and click the "**Edit Tag**" button in the Windward ribbon to open the Tag Editor.



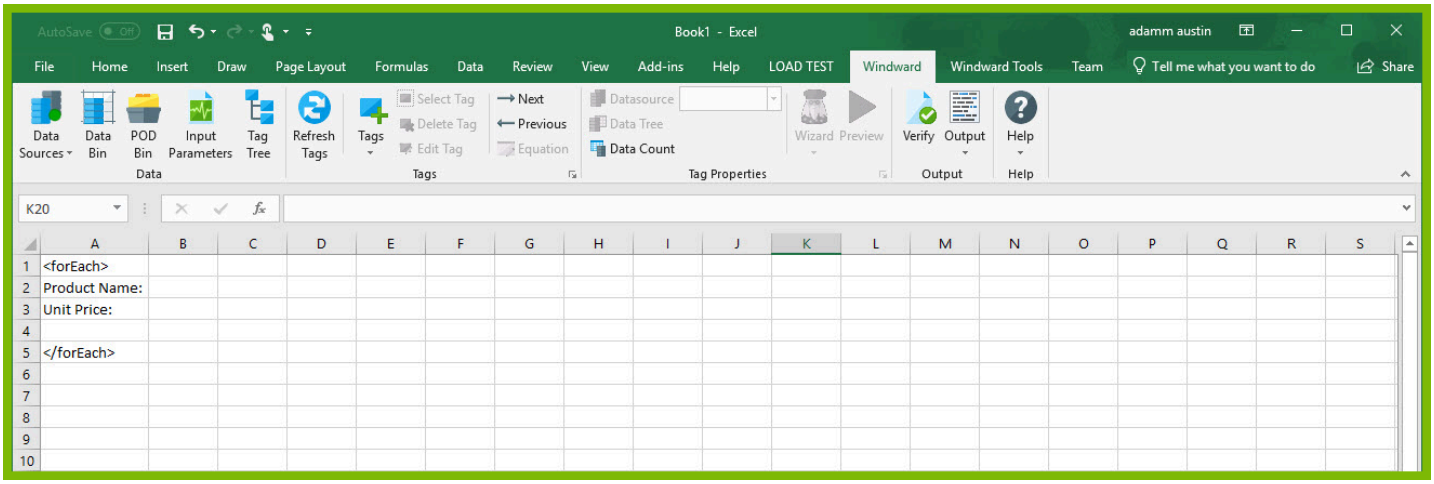
4. In the Tag Tree, expand the node XML: SouthWind.xml -> windward-studios -> Products and double-click the **"Product"**node. This will automatically write a select for the Products node.



5. Click the "**Save Tag**" button. Congratulations! You have just inserted your first tag into your template!



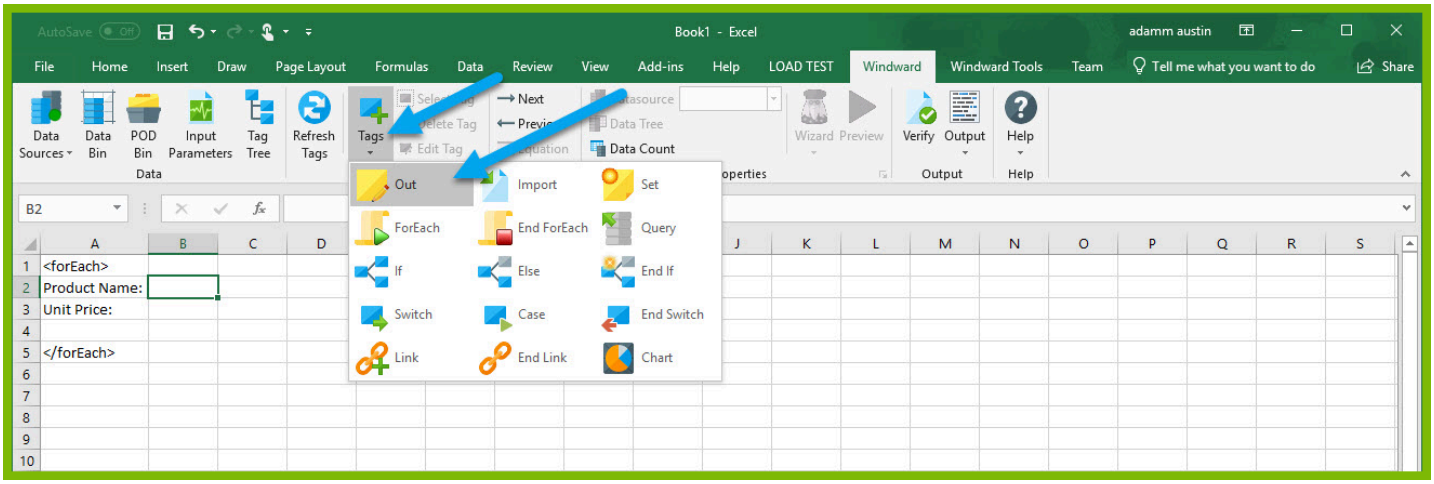
6. In the next cell after the ForEach tag, enter the text “Product Name:” and in the next cell “Unit Price:”



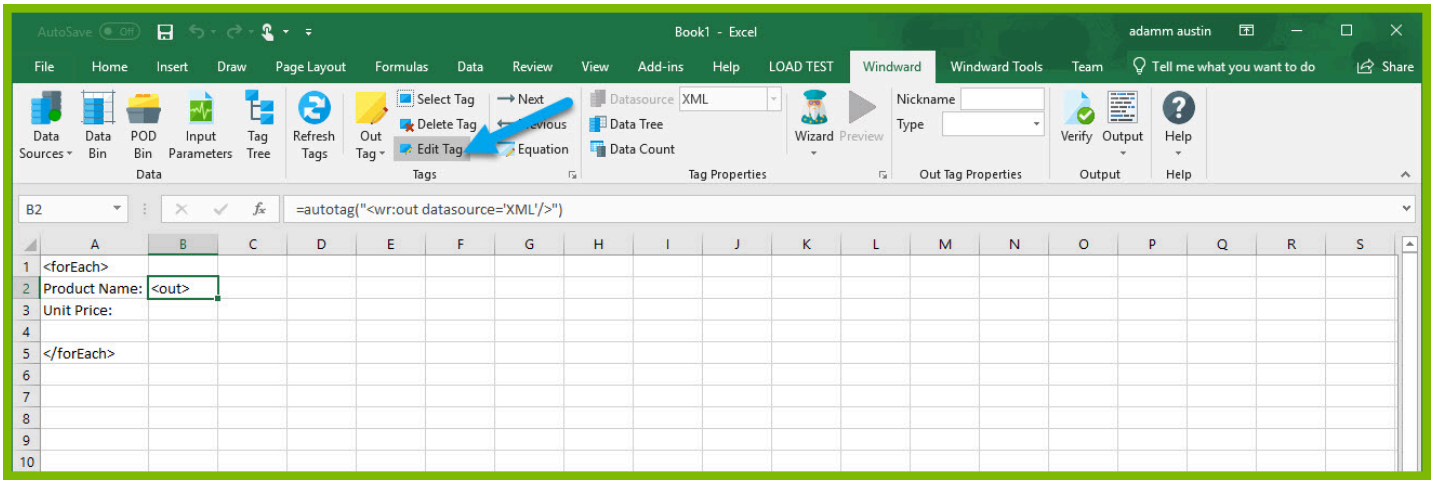
The “Product Name:” and “Unit Price” text will be output for every product returned by your ForEach tag’s select.

Out tags will be used to insert data into your final report. These tags will output the Product Name and Unit Price for each product after these labels.

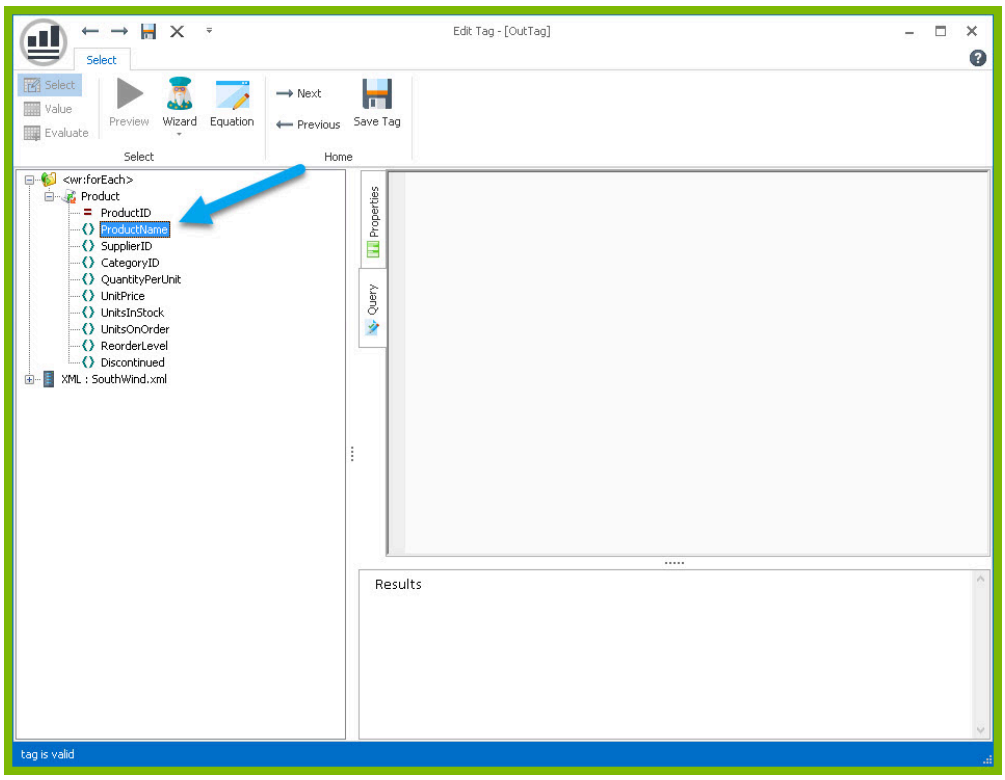
7. Place your cursor in the cell to the right of the “Product Name:” text, and click “**Tags**” in the Windward ribbon and click “**Out.**” This places an Out tag in the cell.



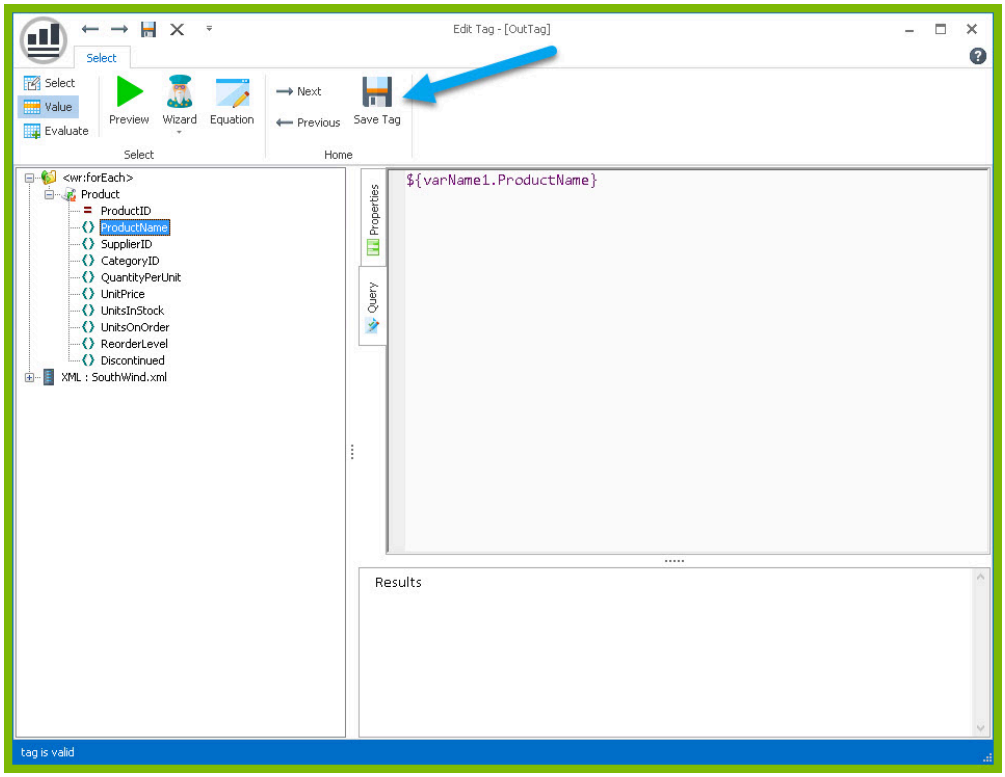
8. Open the tag Editor by placing your cursor on the cell containing the Out tag and clicking "Edit Tag."



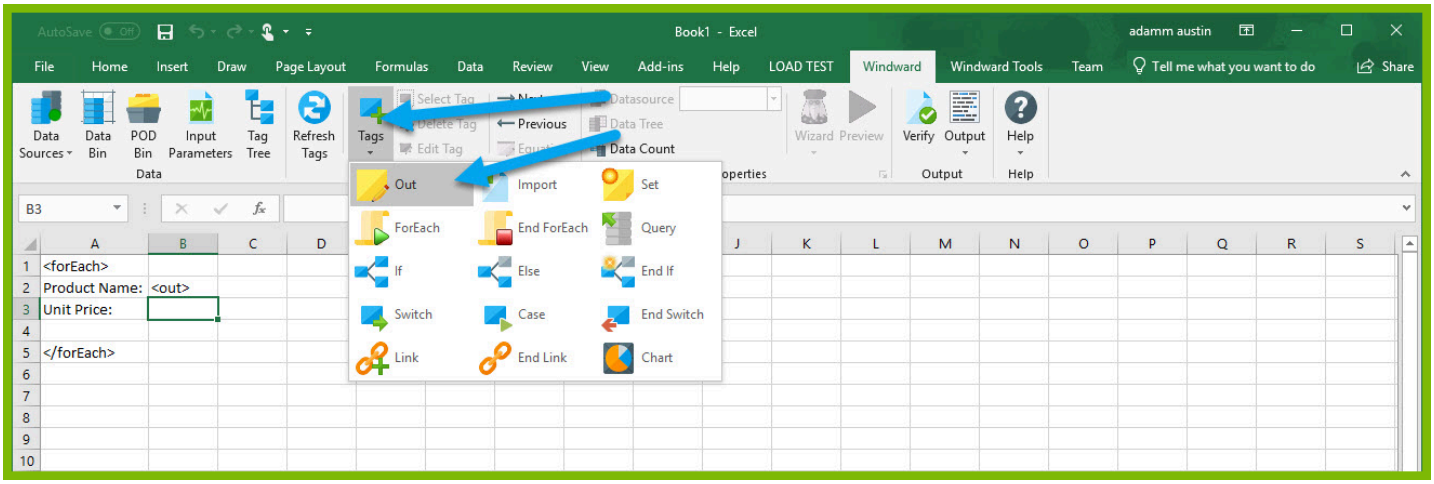
9. You can now see your ForEach variable in the tag editor since the Out tag occurs in the template between the ForEach tag and the EndForEach tag. In the Tag Tree, expand <wr:forEach> -> Product and double-click **ProductName.** This automatically queries the ProductName currently held by the ForEach variable.



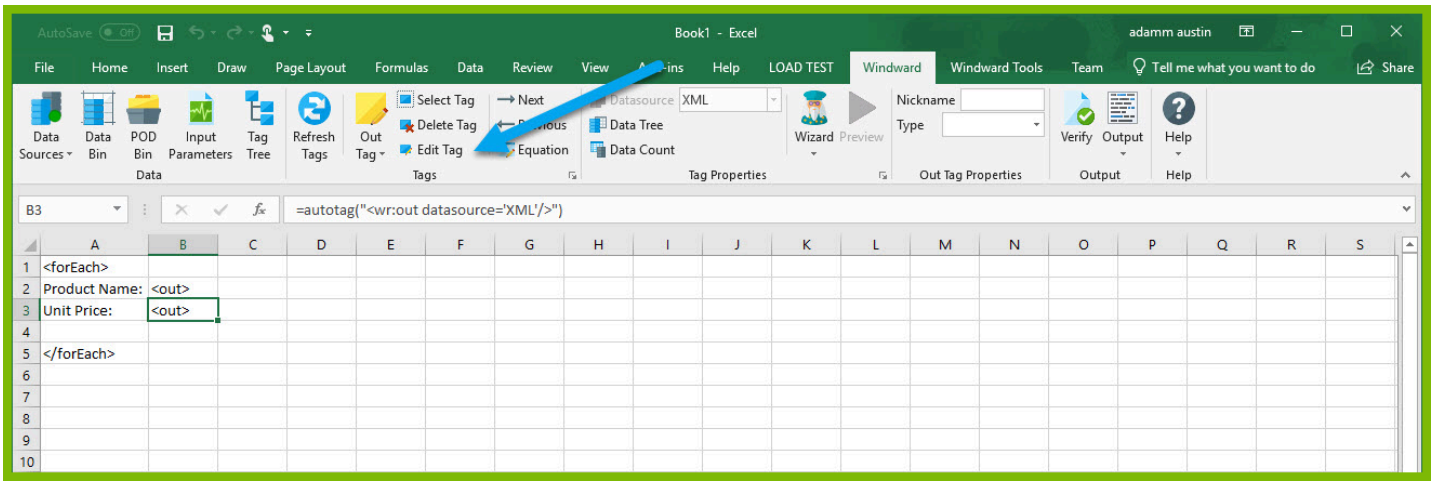
10. Click the "**Save Tag**" button to save your tag's query.



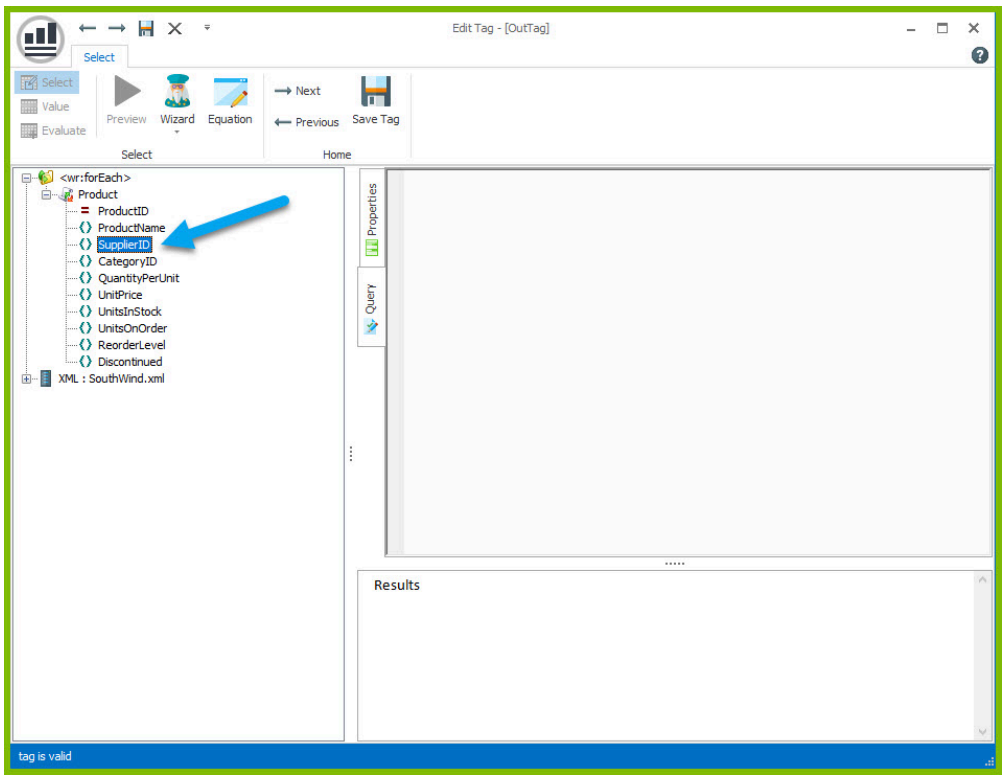
11. Place your cursor in the cell to the right of the "Unit Price:" text, and click "**Tags**" in the Windward ribbon and click "**Out.**" This places an Out tag in the cell.



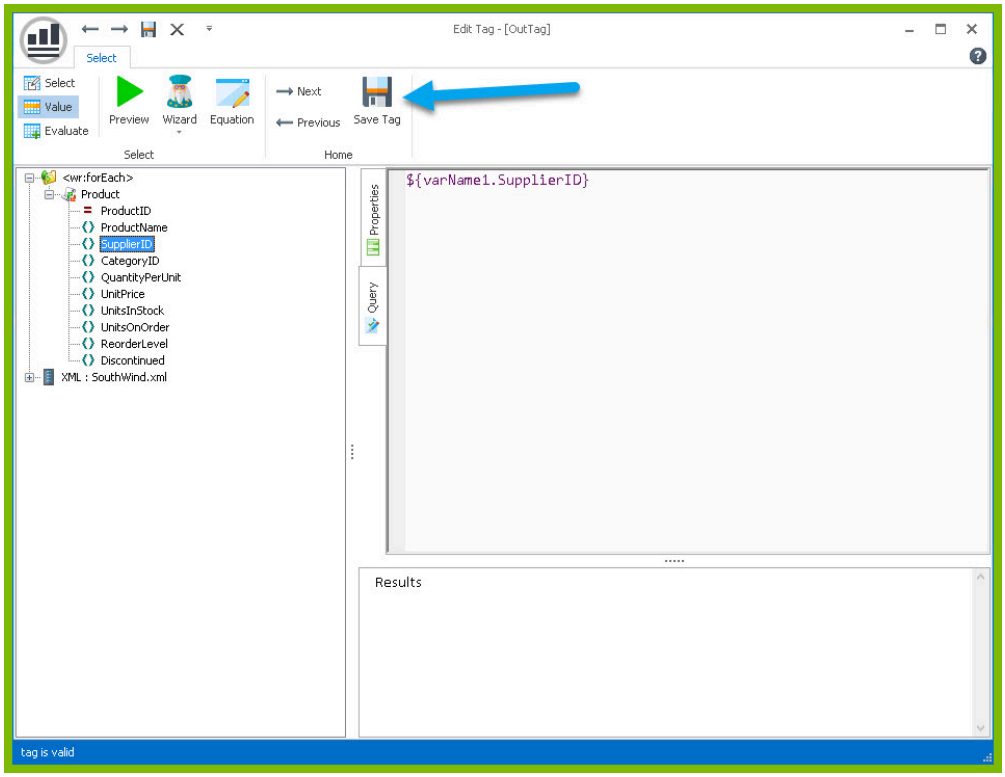
12. Open the tag Editor by placing your cursor on the cell containing the Out tag and clicking "**Edit Tag.**"



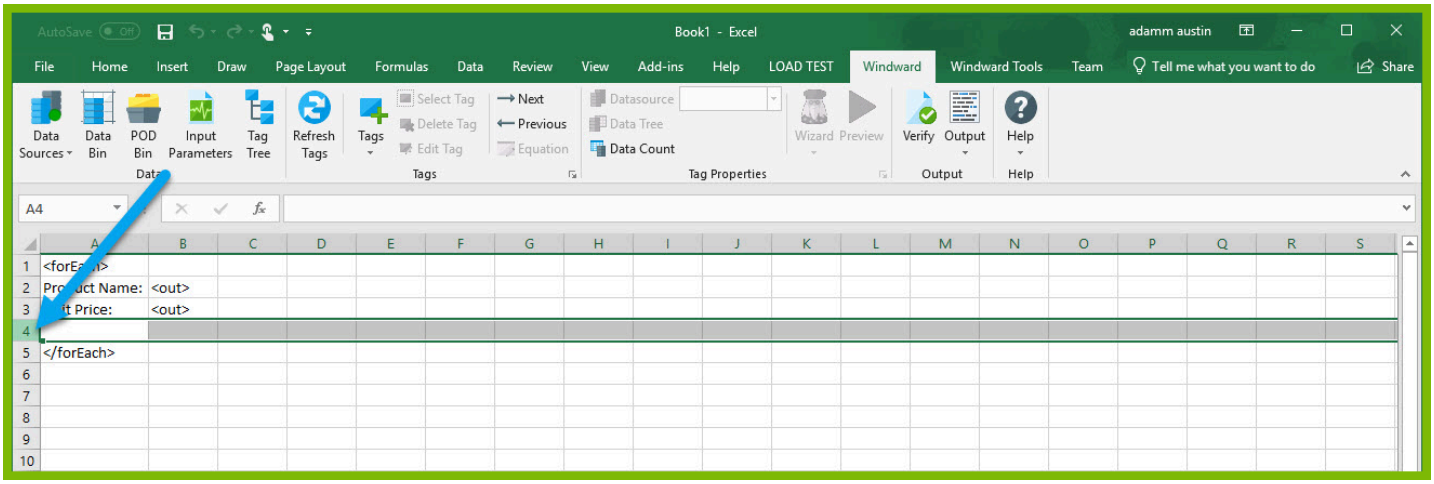
13. You can now see your ForEach variable in the tag editor since the Out tag occurs in the template between the ForEach tag and the EndForEach tag. Expand <wr:forEach> -> Product and double click **UnitPrice.** This automatically queries the UnitPrice currently held by the ForEach tag.



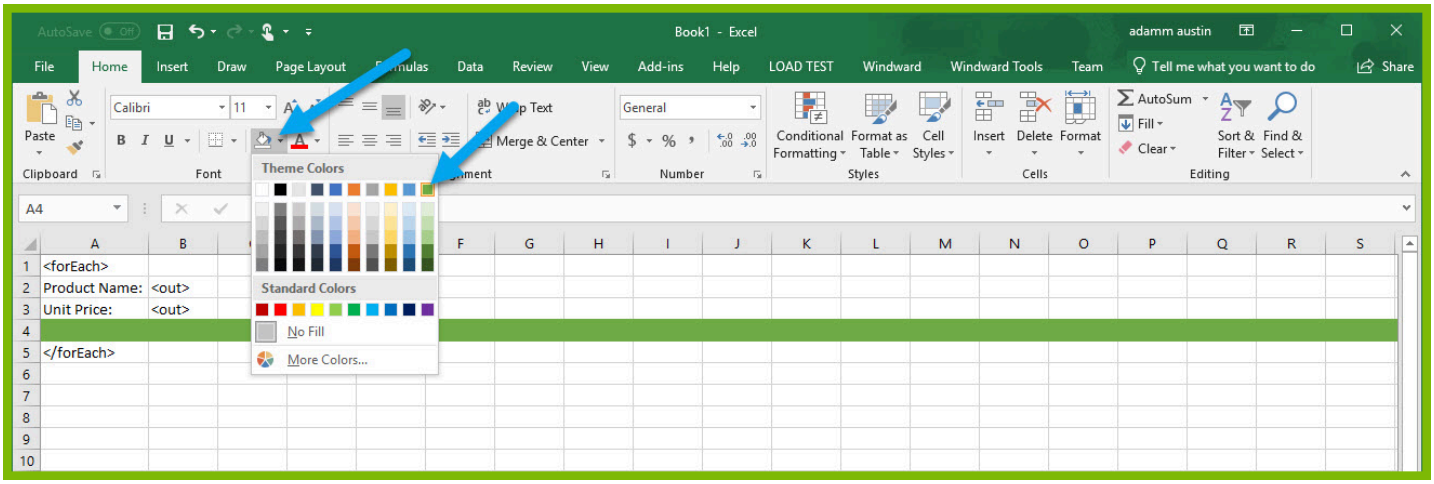
14. Click the "**Save Tag**" button to save your tag's query.



15. Finally, you are going to add some indicator between each product so you can easily distinguish between them in your output. Click on the 4th row on the sidebar to select the entire row.



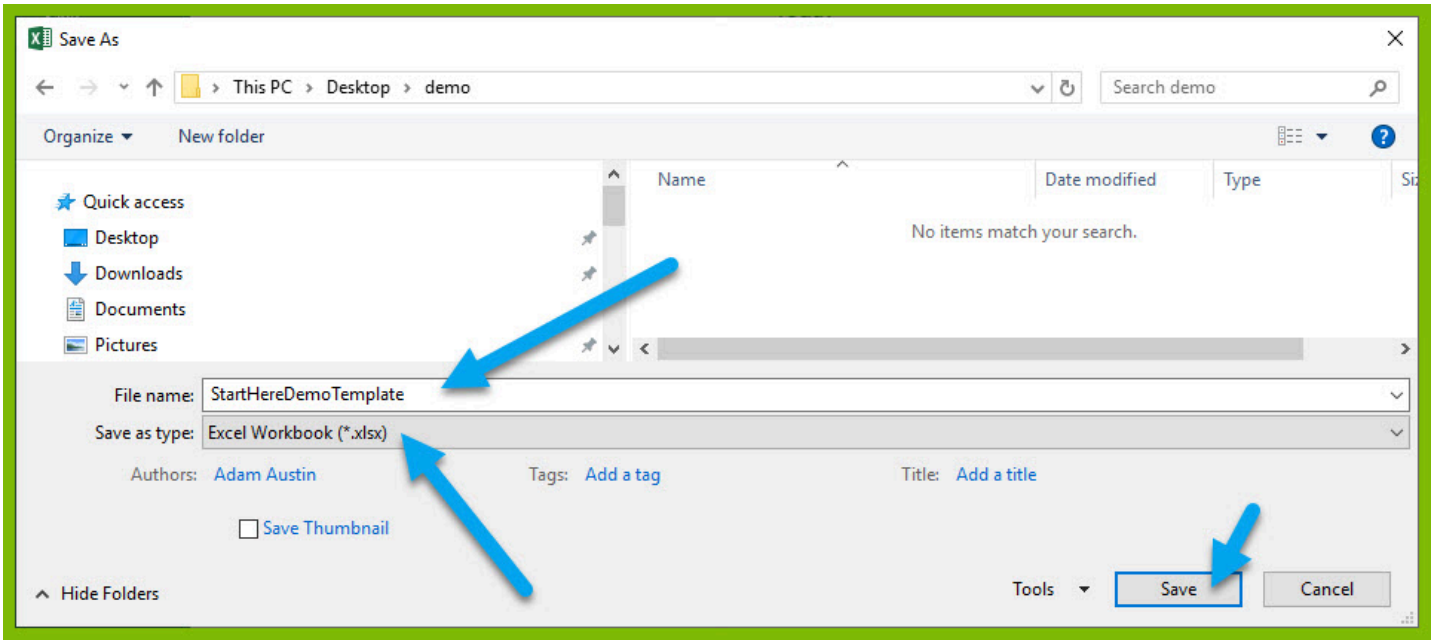
16. Select any fill color for the row so that you will be able to differentiate between each product.



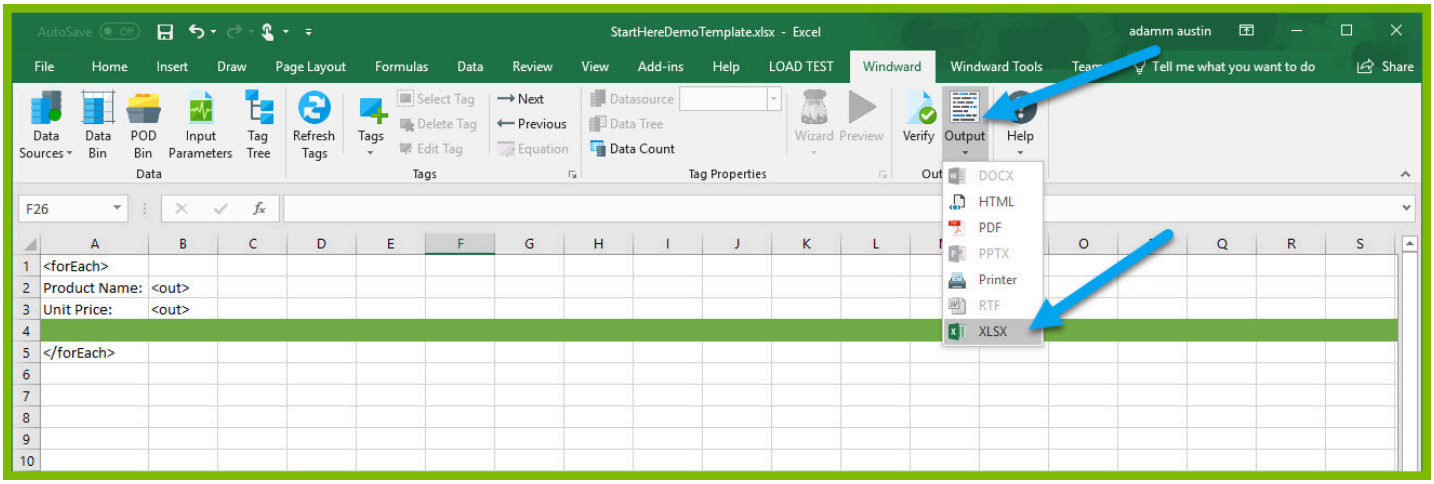
Now you are all finished with your template design!

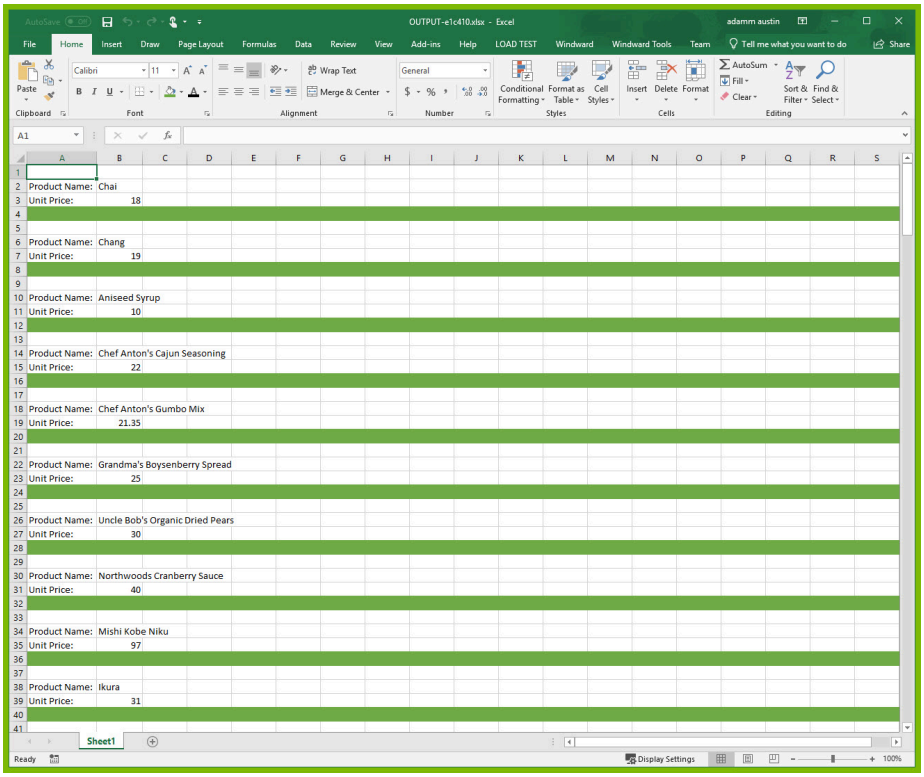
Step 4: Output

1. Save your template. You can save your template to anywhere you want on your machine and give it any name you want. Be sure to save it as a ".xlsx" document.



2. In the “Windward” tab, click the “**Output**” button and from the drop down select “**XLSX**.”





Your template will output, and you should see a list of product names and their unit price with each product separated by a filled row in the excel sheet.

Congratulations! You have created your first template in Windward Designer and produced your first output!

Next Steps

Now that you have finished this introduction tutorial, here are some resources we recommend you visit next:

1. How to connect to XML datasources
2. How to use the XPath Wizard
3. The Windward Tutor: A collection of short video tutorials
4. Creating an Invoice in Windward Designer

Creating a Template in PowerPoint with JSON Data

Training Guide

Welcome to Windward Designer

Windward Studios takes a unique approach to reporting. Our Report Designer sits directly inside Microsoft Office which means you get to use a **familiar and powerful tool** without having to learn a new designer. If you've ever used one of our competitors' products, you may be familiar with their modular designers that require you to build reports using bits and pieces, where every bit of text or every piece of data is a distinct object in your template. Windward changes all of that. With Windward in Microsoft Office, you **design report templates just like you design any other document**, utilizing Tags to insert your data wherever you need it seamlessly in-line with your other text and content.

Training Overview

This Training Guide walks you through the fundamental steps you need to begin designing templates with Windward Designer in Microsoft PowerPoint using a JSON Datasource.

The Four Steps to Windward:

1. Install
2. Connect to data
3. Design your template & insert your data
4. Output

Step 1 - Install

To get started, you need to install the Designer. If you have it already installed, please skip this step!

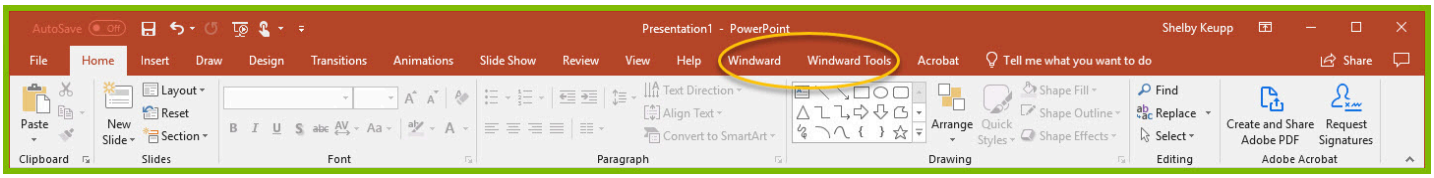
If you already have a license key, please visit the downloads page to install the software.

Or start a free 14-day trial!

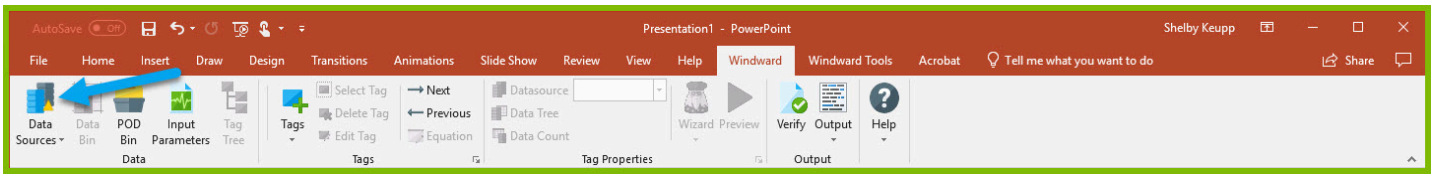
Step 2 - Connect to Data

In this training guide, you are connecting to a sample JSON Datasource provided by Windward. **To connect to the sample data:**

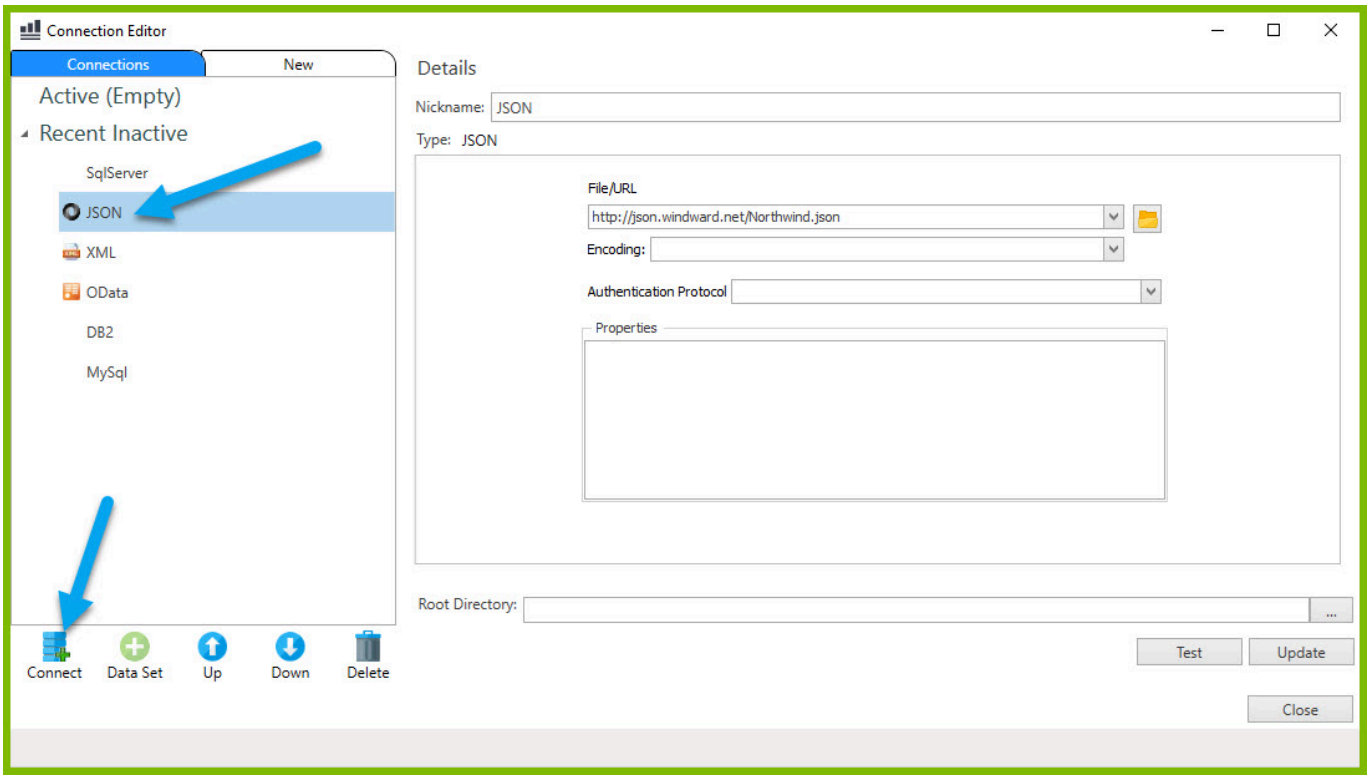
1. Open Microsoft PowerPoint. Now that you've installed Windward Designer, you will see two new tabs in the Microsoft Office Ribbon – the "**Windward**" Tab and the "**Windward Tools**" Tab.



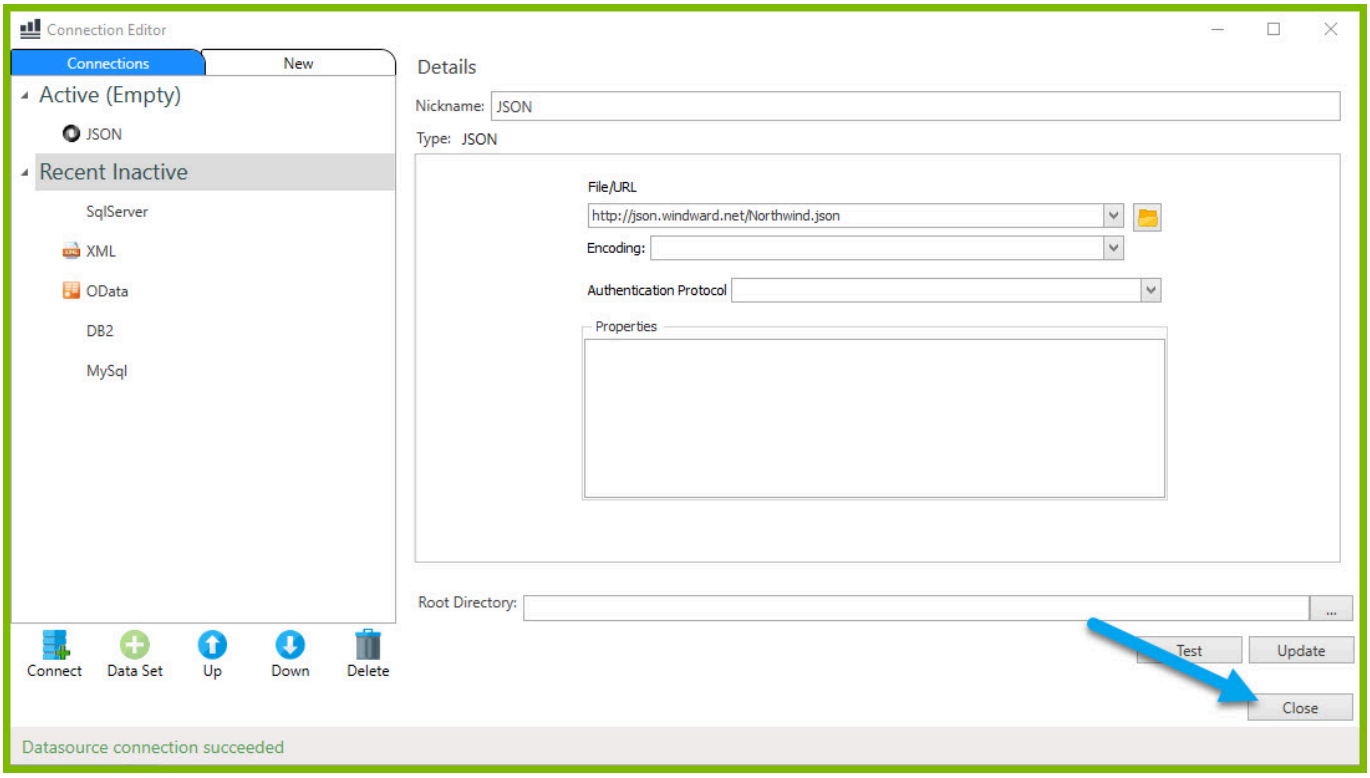
2. Click on the **"Windward" Tab** and click on the **"Data Sources"** button located on the left-hand side of the ribbon. This opens the Connection Editor where you will manage all your data connections. (Alternatively, you can click on the lower half of the button to expand the drop down and then click **"Data Sources."**)



3. In the Connection Editor window, select the data connection labeled "**JSON**" under "Recent Inactive" and click the "**Connect**" button.



4. Close the Connection Editor by clicking **"Close."** You have now successfully connected to the sample data!



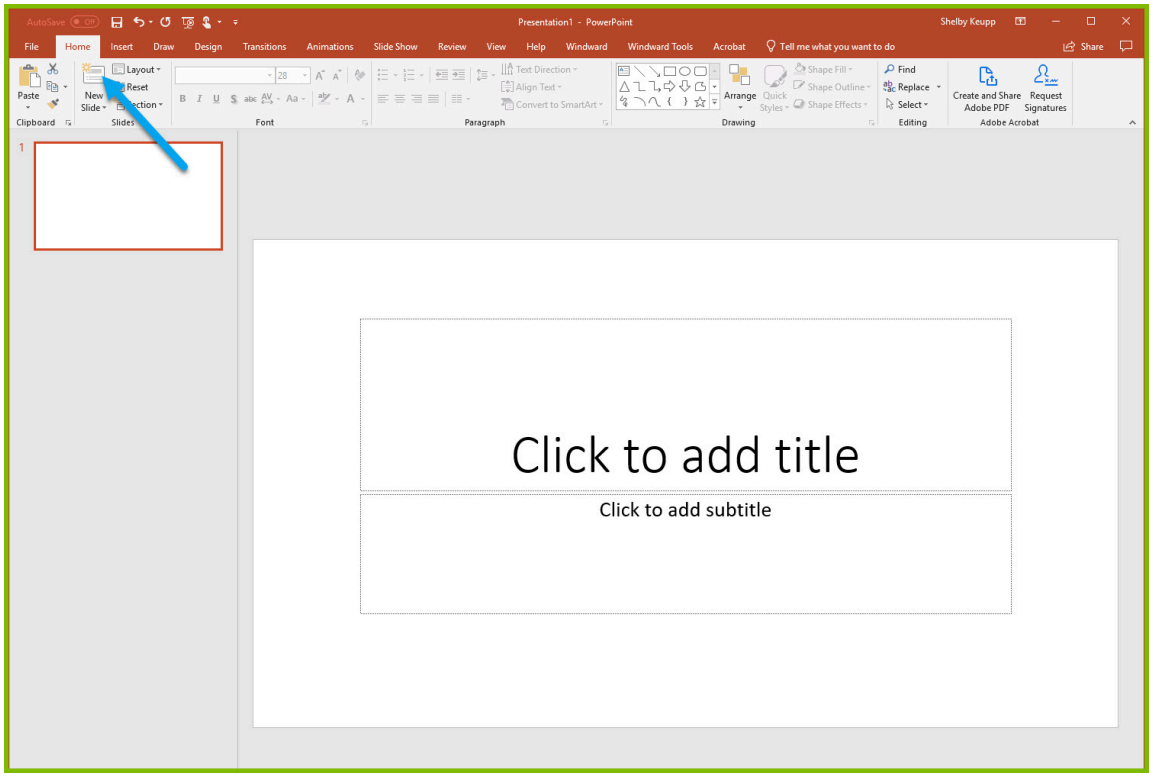
Step 3 - Design Your Template & Insert Your Data

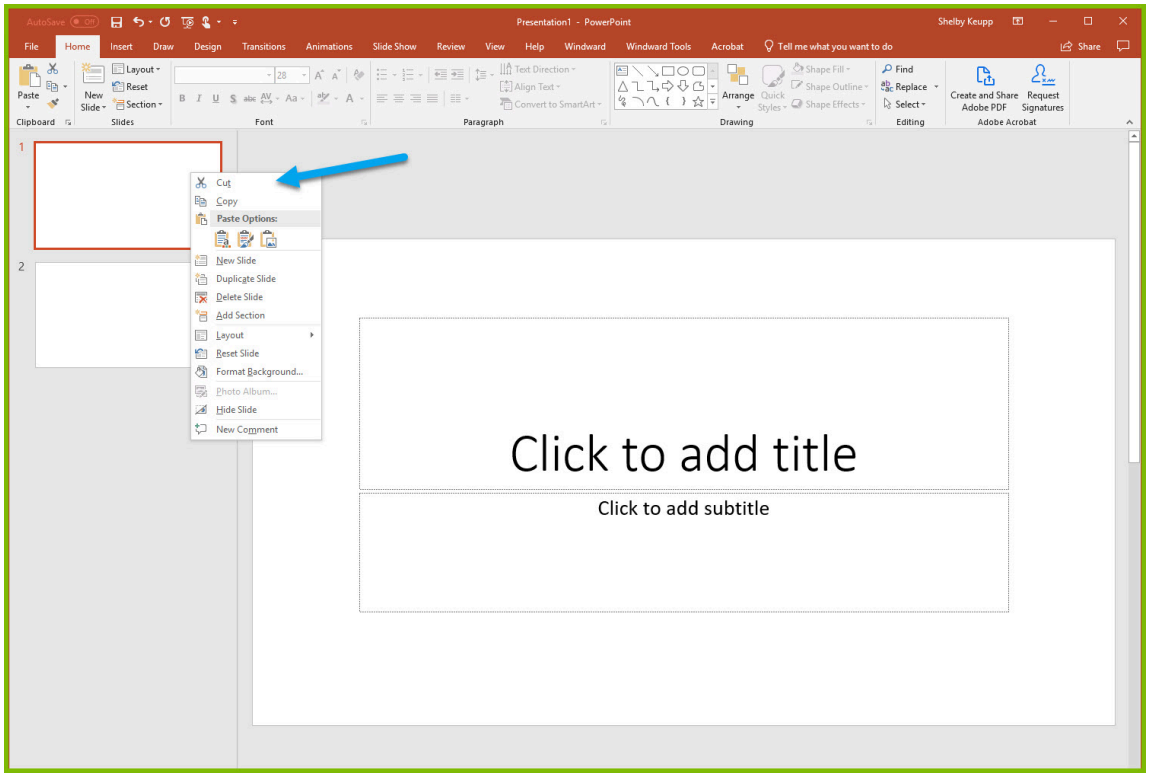
In this training guide, you will build a very basic template to get the feel of Windward Designer. While your final product may not seem very impressive, you will learn the basic skills to making any template! You will make a template which will output the product name and unit price for every product in the sample data, with each product separated by a new slide.

In situations where you want to output many records returned from a select, you can use a ForEach tag. The ForEach tag will generate output once for each record returned by its select. The ForEach tag itself will not insert data into the template, but rather stores data in a variable that can be used by other tags to generate output.

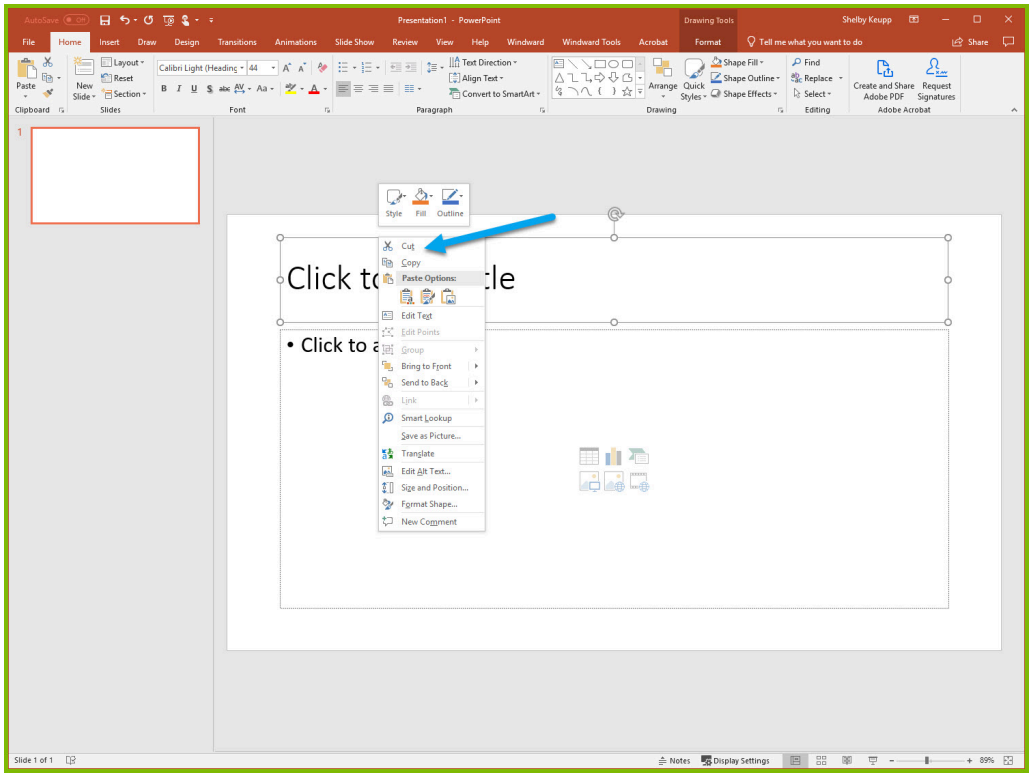
For this example, we will use a new "**Title and Content**" template.

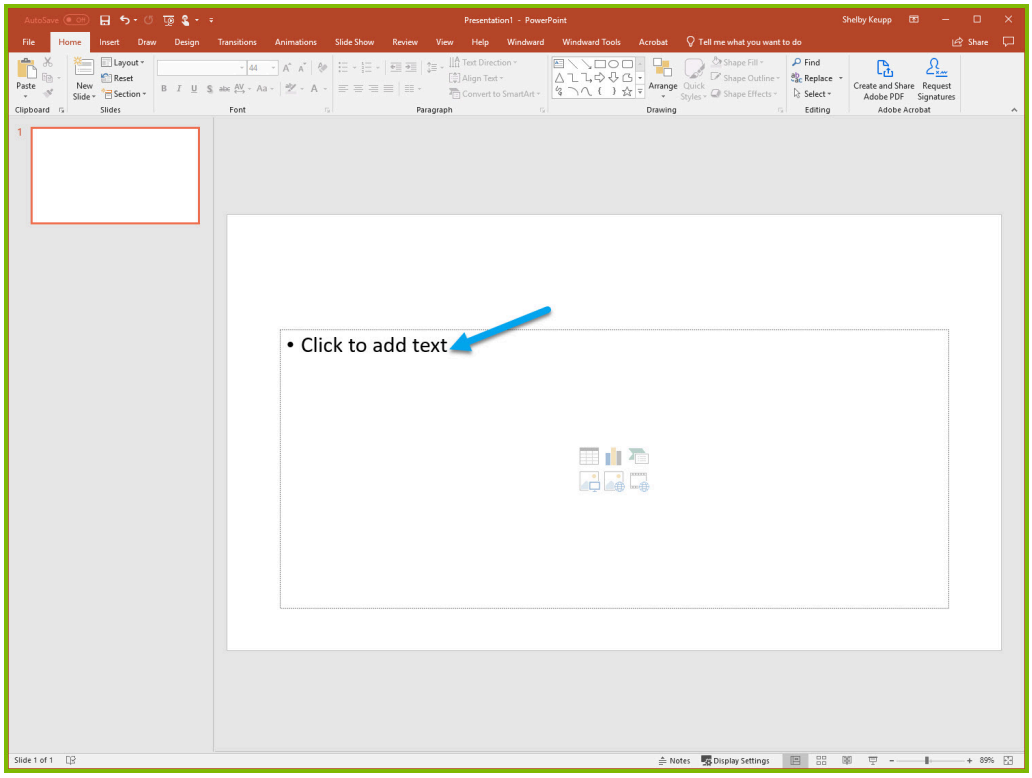
1. Click on the "**New Slide**" button to create a new slide, then delete the original Title slide.



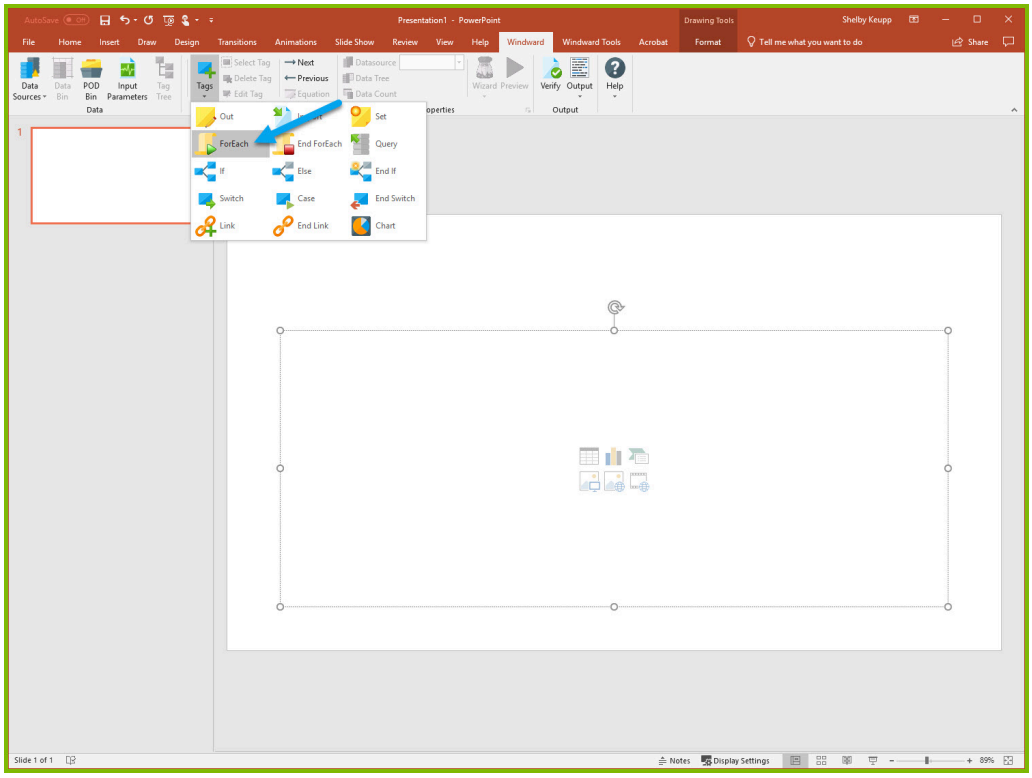


2. Click on the top text box that is labelled "**Click to add title**", then press Delete to remove the extra text box. Now click inside the remaining text box and hit the backspace button to delete the bullet point.

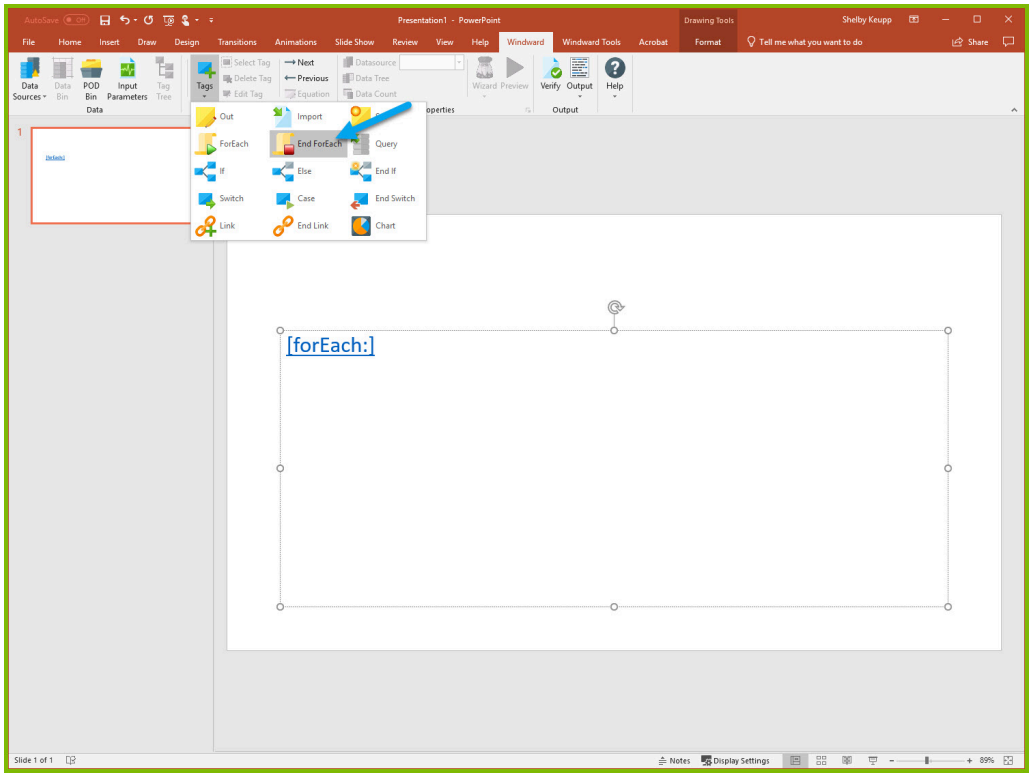




3. To place a ForEach tag, expand the drop down under the button "**Tags**" in the Windward ribbon and click "**ForEach**."

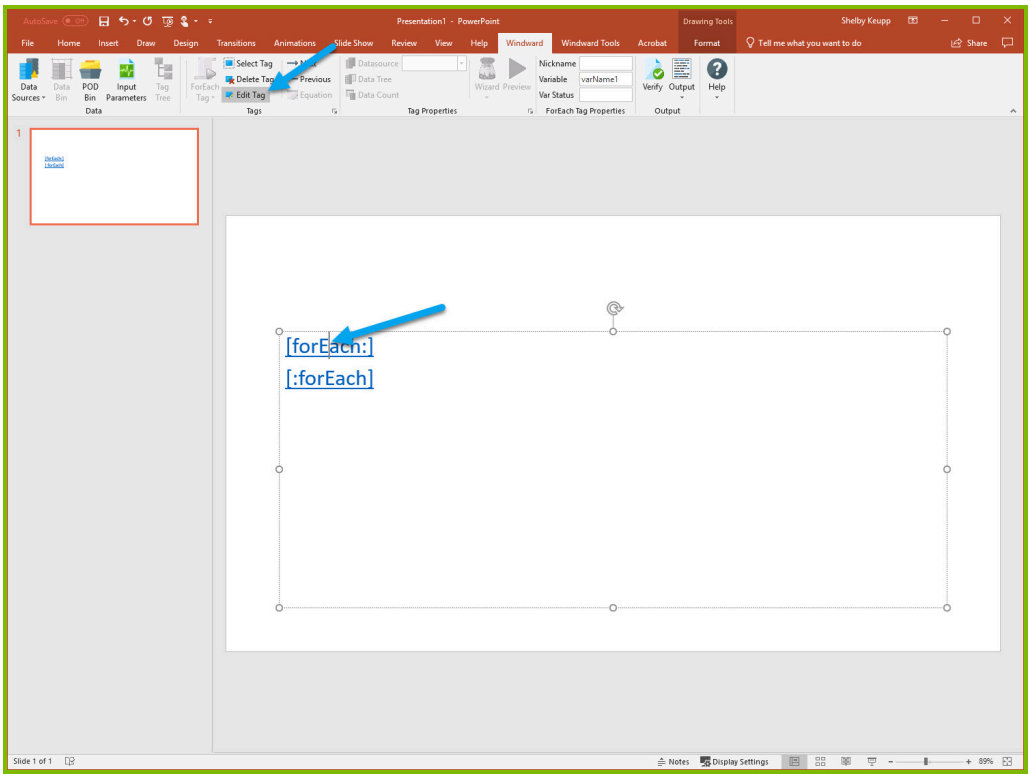


4. Click enter to move to a new line, expand the drop down under the button "**Tags**" in the Windward ribbon, and click "**EndForEach**" to place a closing tag for the ForEach tag.

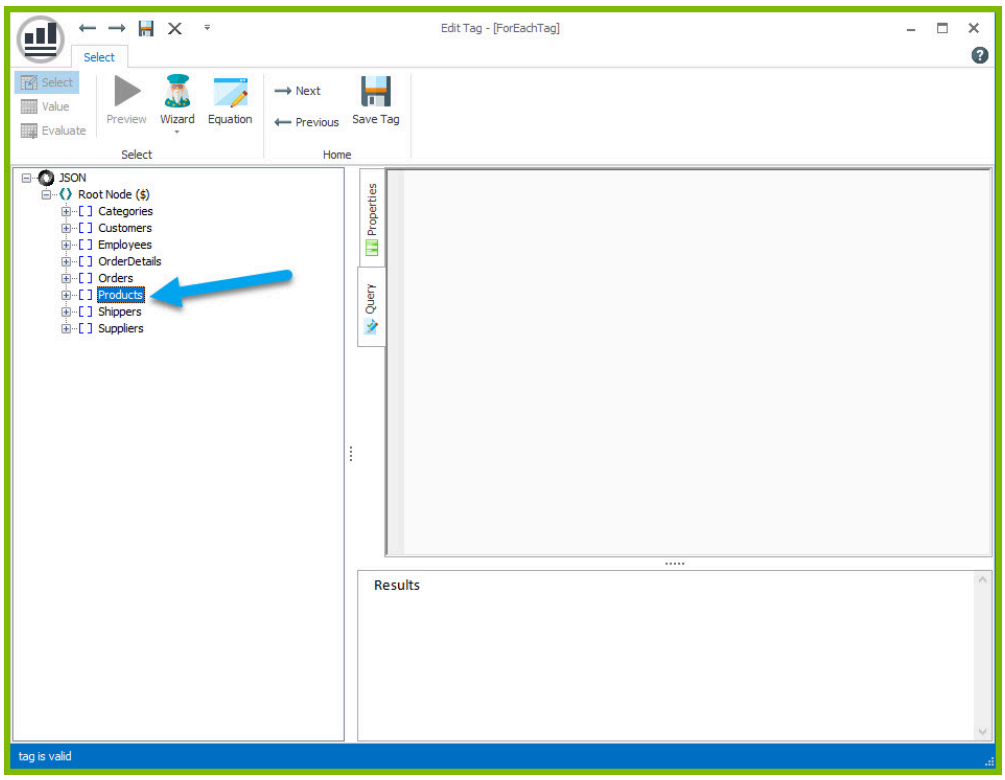


Now all the content that you place between the ForEach and EndForEach tags will be generated once for each record returned by the ForEach tag's select

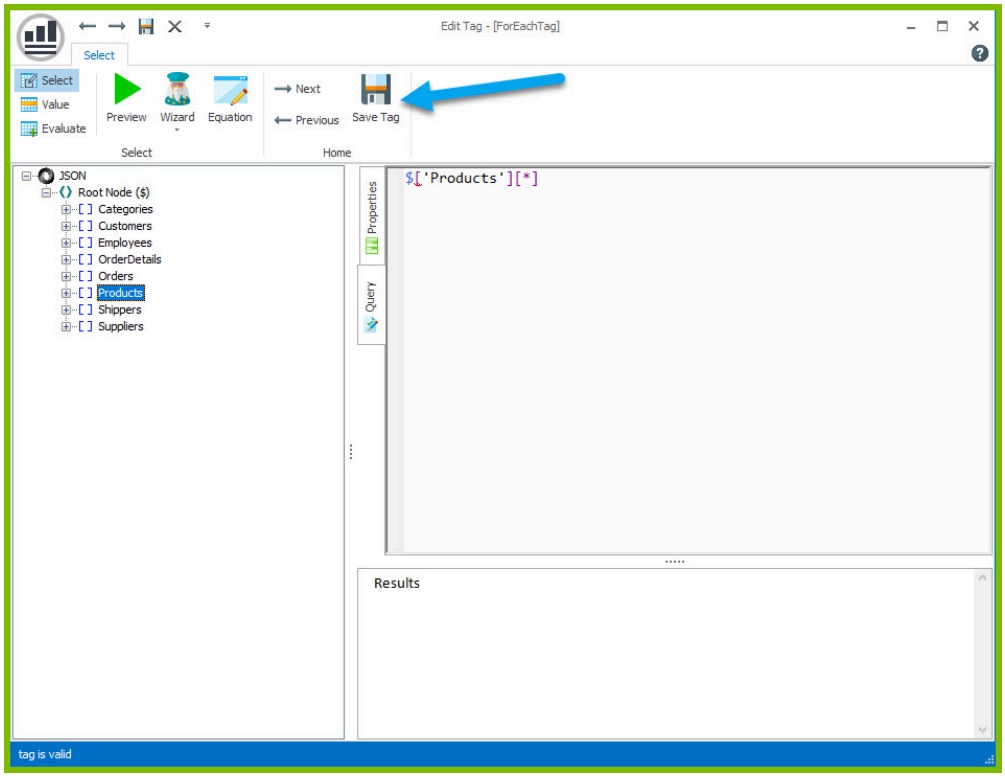
5. For the ForEach tag, you will select the Product table so that you can output information on each product. You can use the Tag Editor to easily create a query for your tag. Place your cursor on the **"[forEach:]"** tag that was inserted in your template and click the **"Edit Tag"** button in the Windward ribbon to open the Tag Editor.



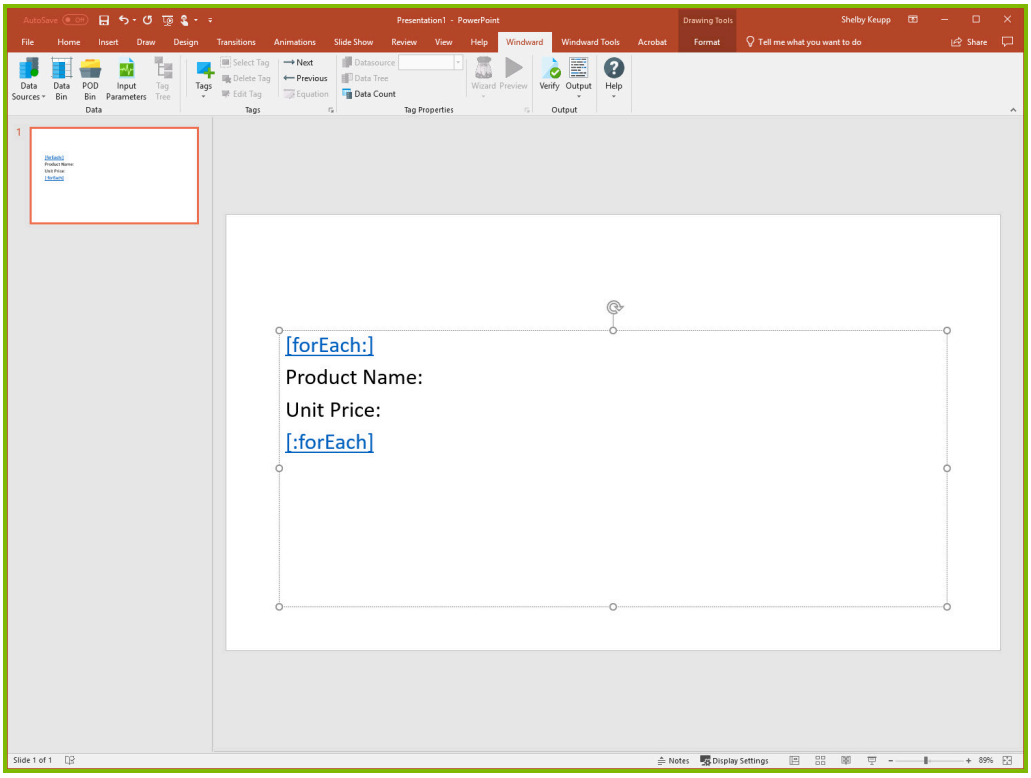
6. In the Tag Tree, expand the node JSON -> Root Node ($) and double-click the **"Products"** node. This will automatically write a select for the Products node.



7. Click the "**Save Tag**" button. Congratulations! You have just inserted your first tag into your template!



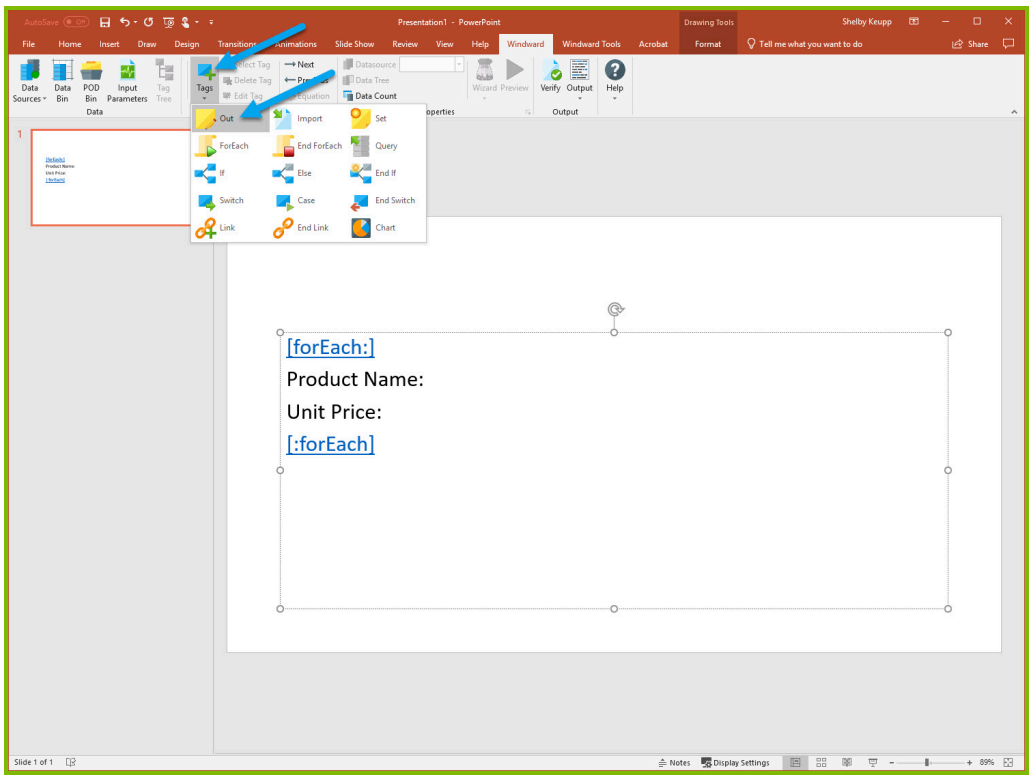
8. On a new line after the ForEach tag, enter the text "Product Name:" and on the next line "Unit Price:".



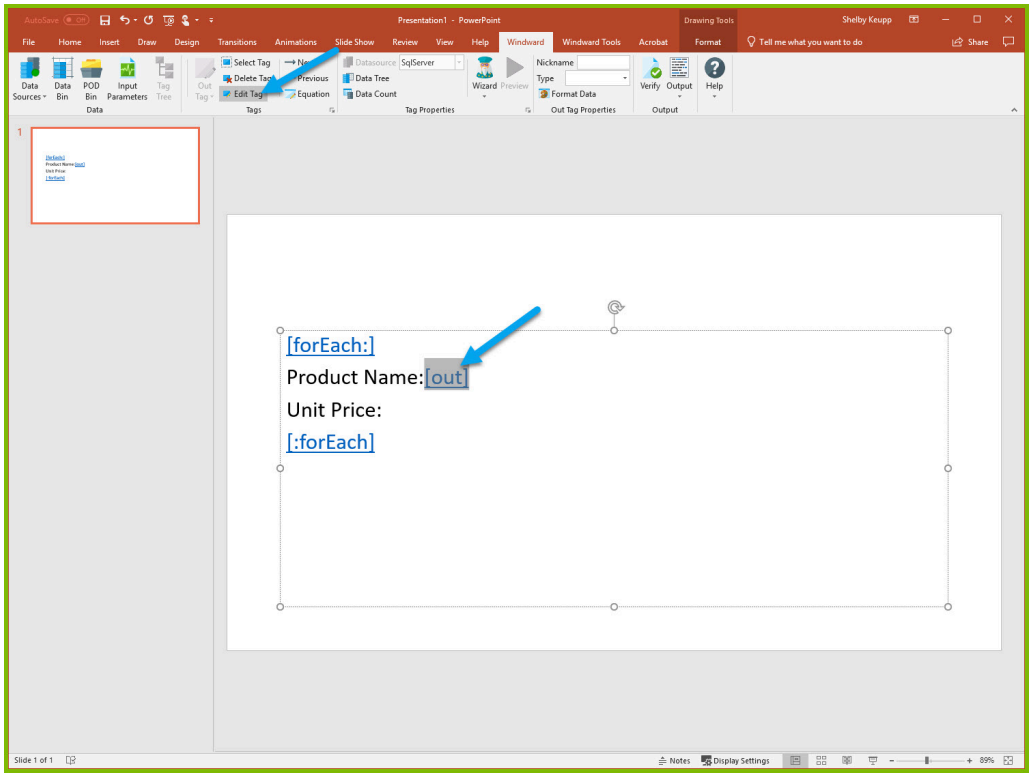
The “Product Name” and “Unit Price” text will be output for every product returned by your ForEach tag’s select.

Out tags will be used to insert data into your final report. These tags will output the Product Name and Unit Price for each product after these labels.

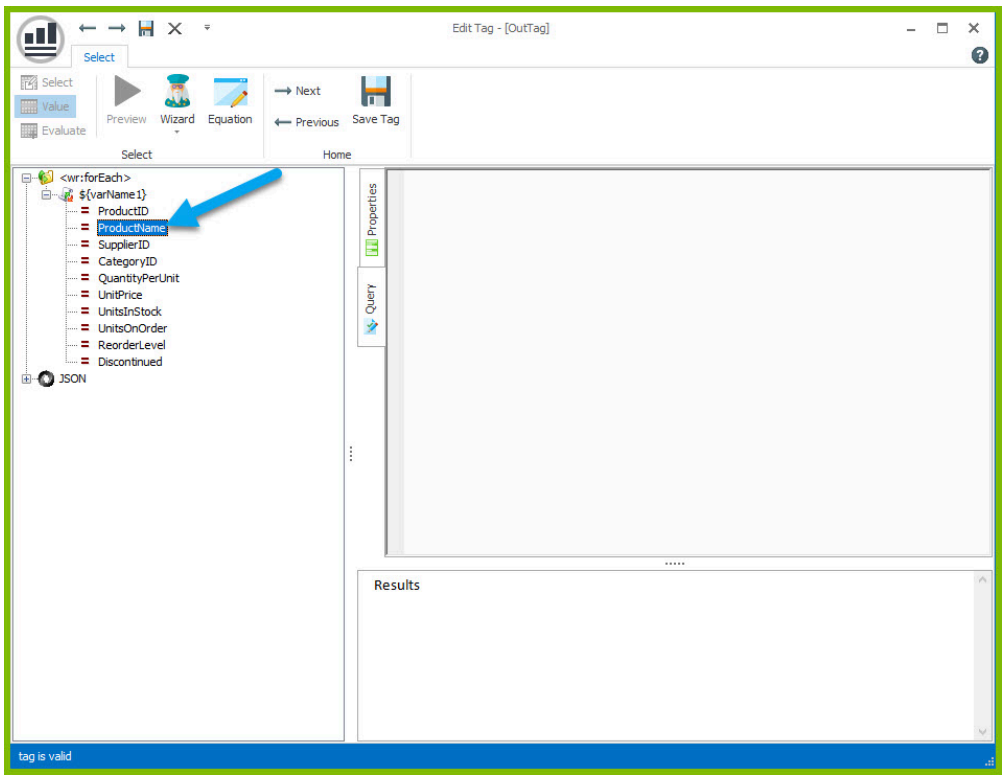
9. Place your cursor after the “Product Name:” text, click “**Tags**” in the Windward ribbon, and click **“Out.”** This places an Out tag at the location of the cursor.



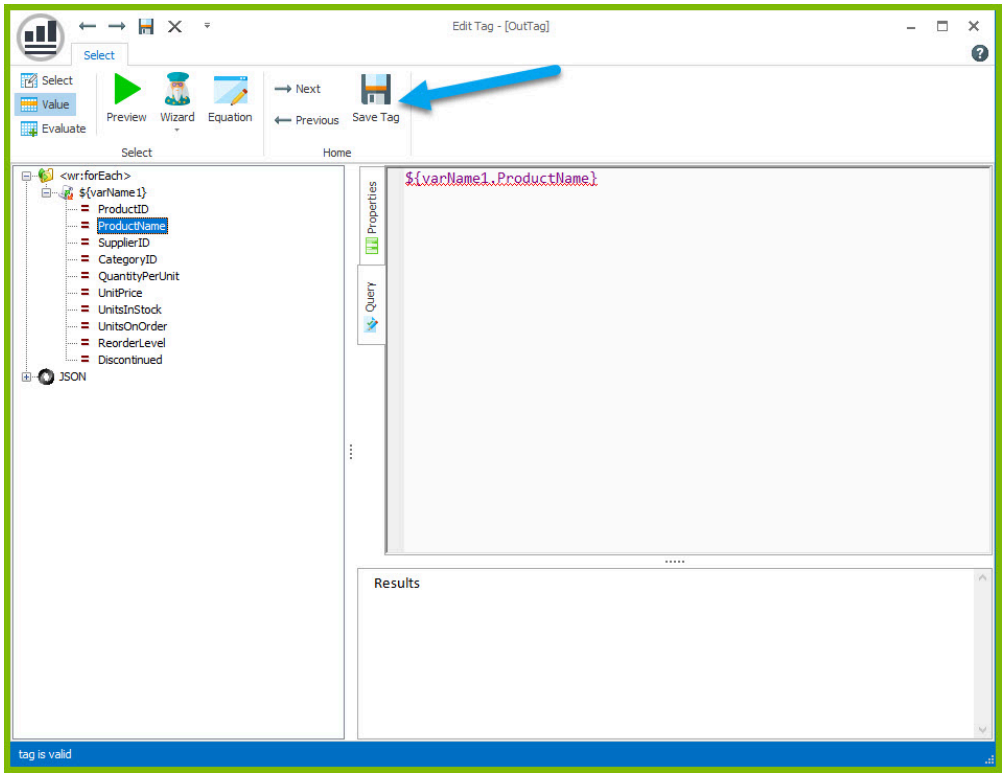
10. Open the tag Editor by placing your cursor on the Out tag and clicking "**Edit Tag**."



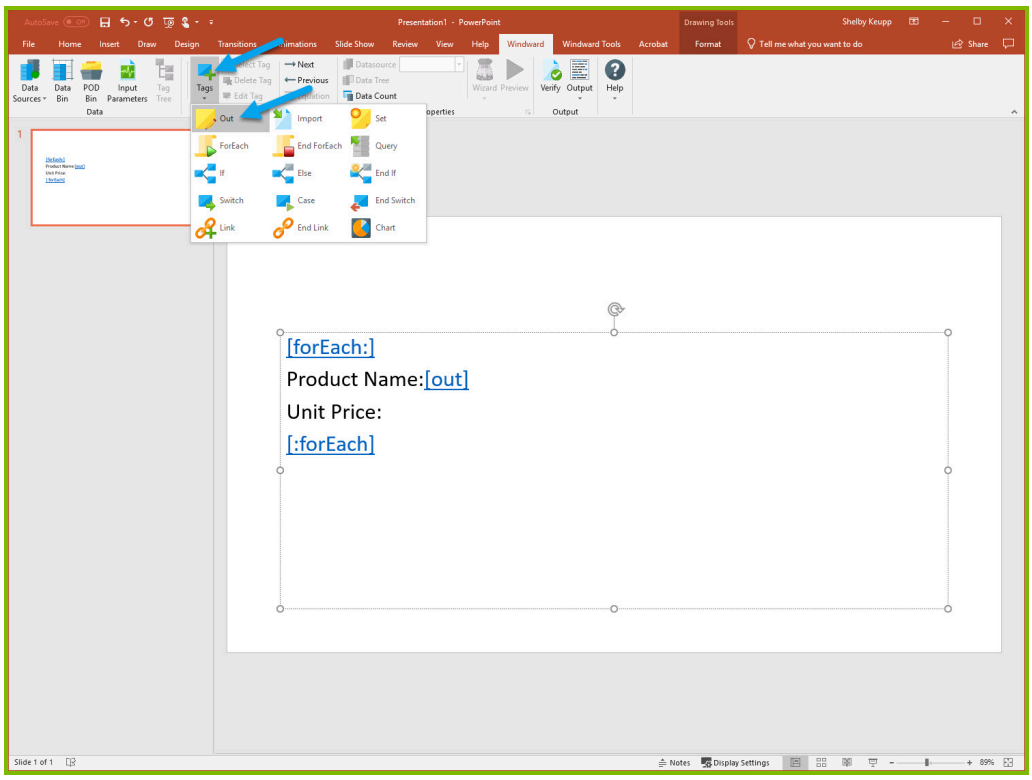
11. You can now see your ForEach variable in the tag editor since the Out tag occurs in the template between the ForEach tag and the EndForEach tag. In the Tag Tree, expand <wr:forEach> -> varName1 and double-click **"ProductName."** This automatically queries the ProductName currently held by the ForEach variable.



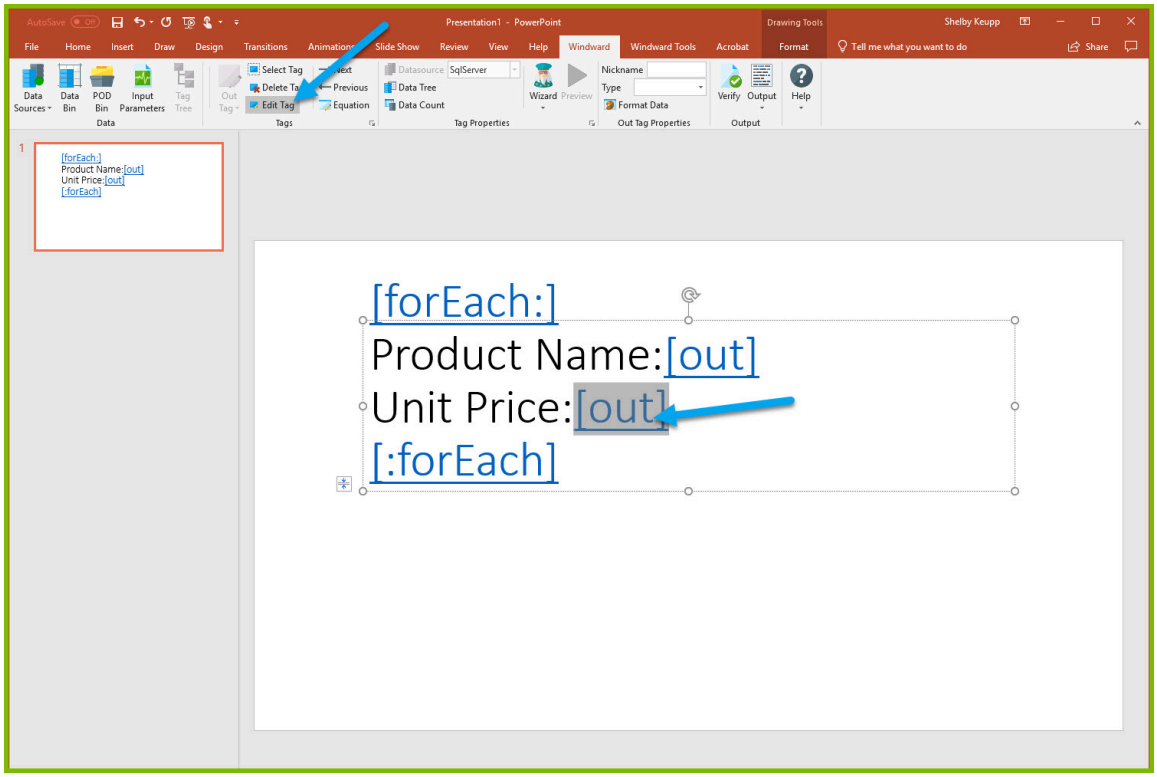
12. Click "**Save Tag**" button to save your tag's query.



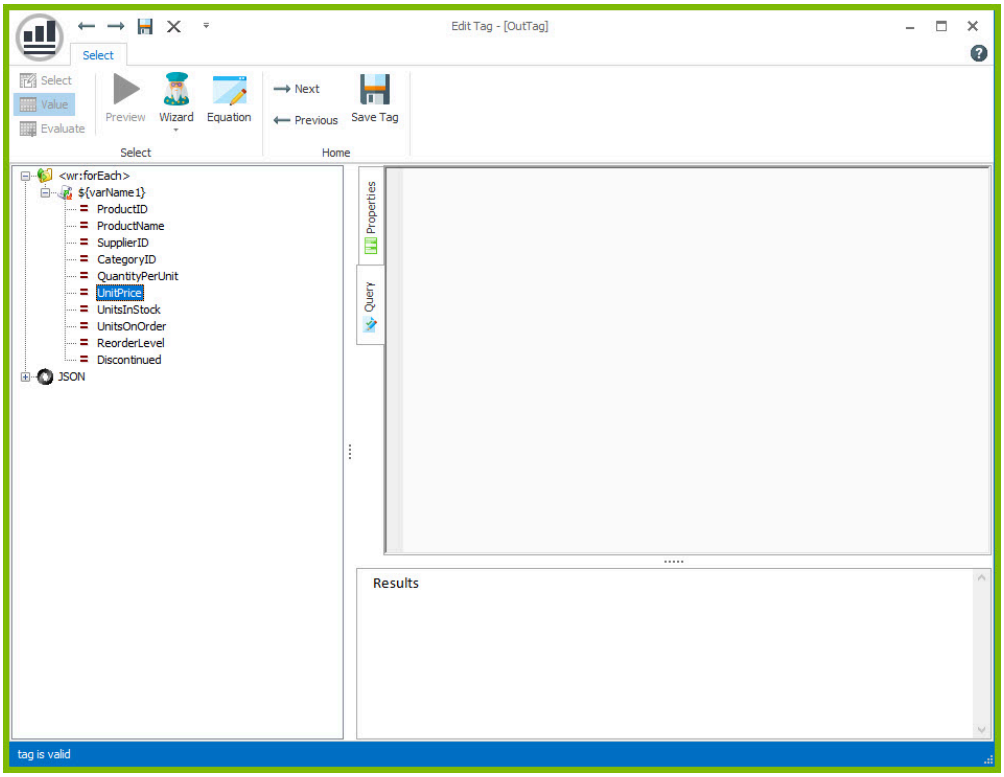
13. Place your cursor after the "Unit Price:" text and click "Tags" in the Windward ribbon and click "**Out**." This places an out tag at the location of the cursor.



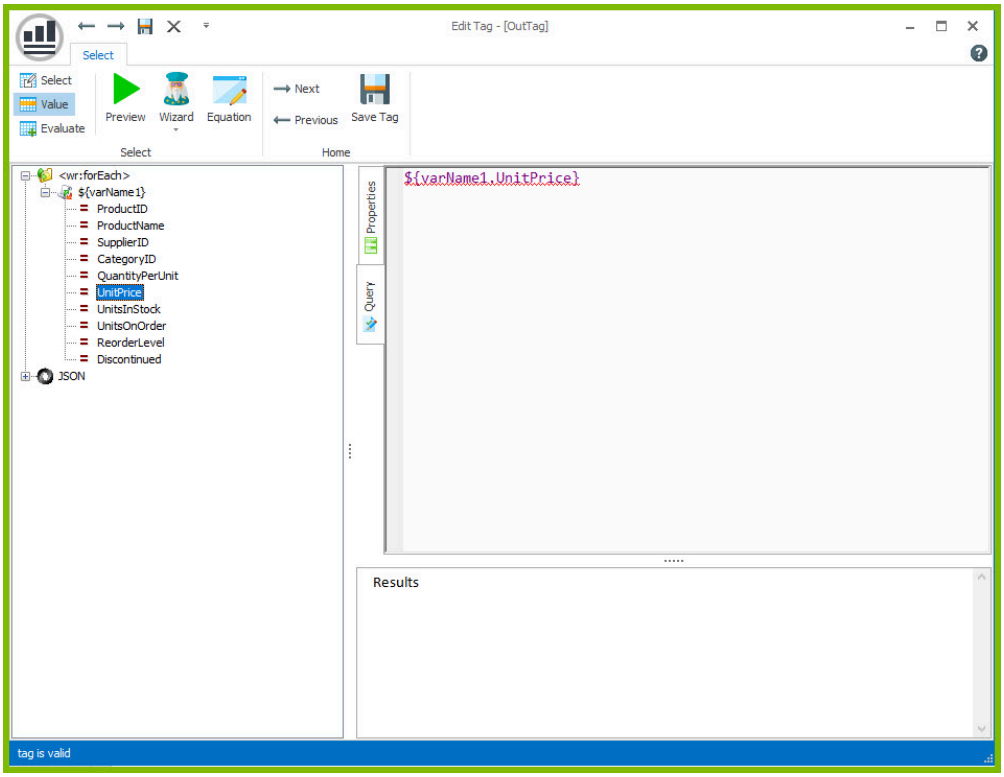
14. Open the tag Editor by placing your cursor on the Out tag and clicking "**Edit Tag**."



15. You can now see your ForEach variable in the tag editor since the Out tag occurs in the template between the ForEach tag and the EndForEach tag. Expand <wr:forEach> -> varName1 and double click UnitPrice. This automatically queries the UnitPrice currently held by the ForEach tag.

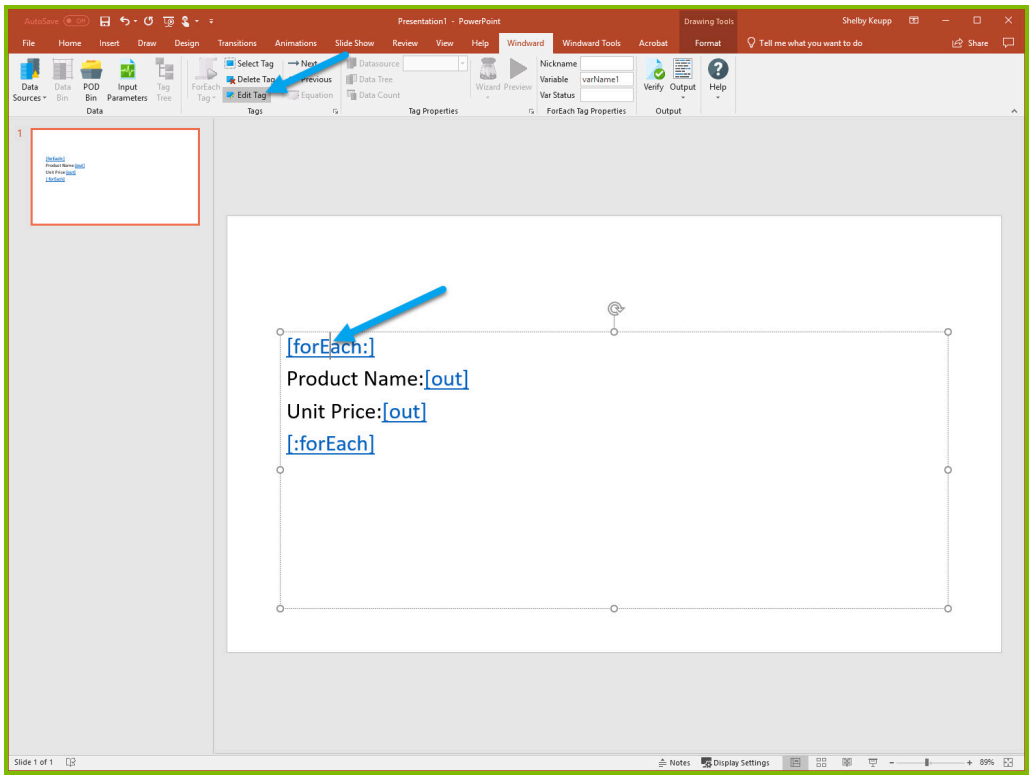


16. Click the **"Save Tag"** button to save your tag's query.

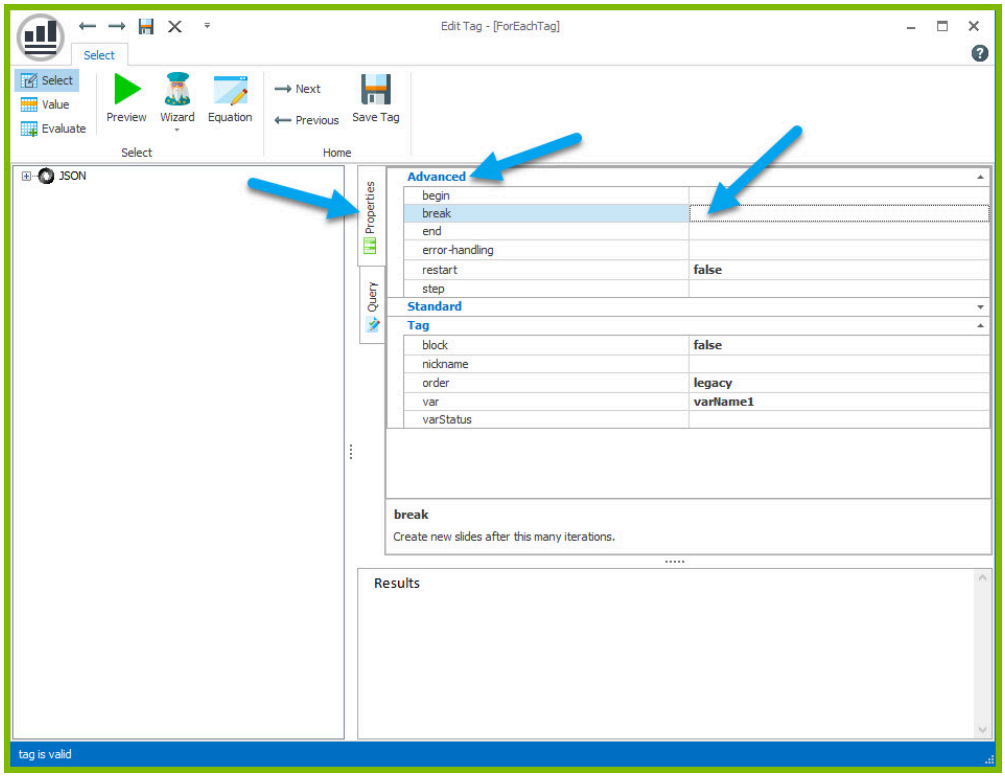


Finally, you are going to add some indicator between each product, so you can easily distinguish between them in your output. Each output will be on its own slide.

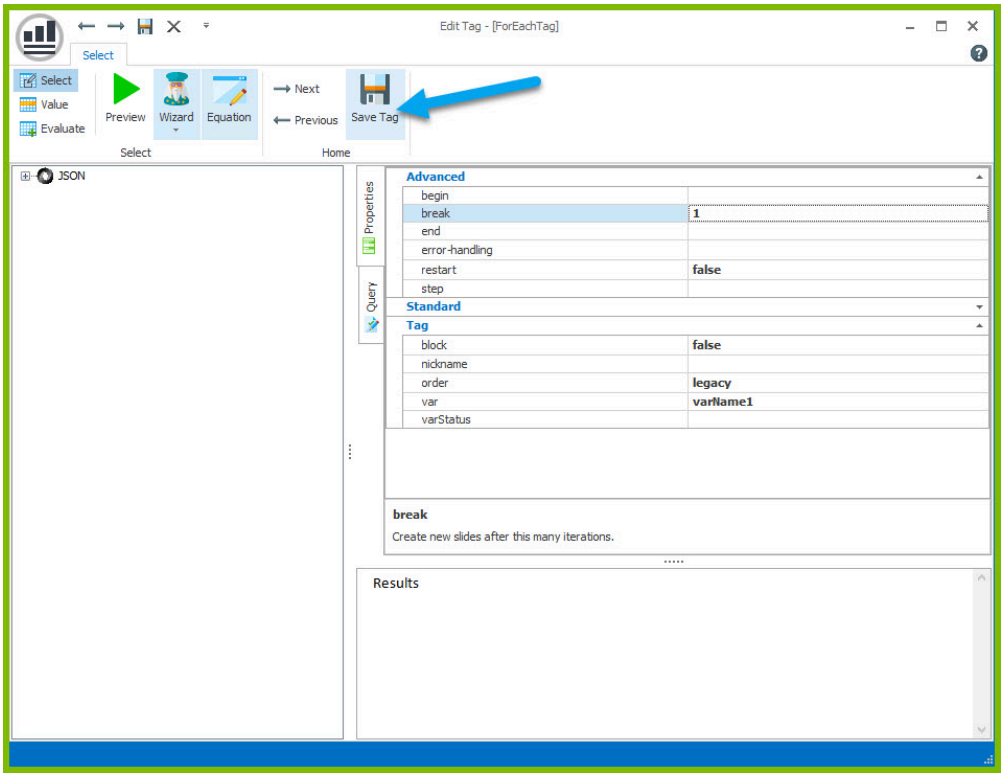
17. Place your cursor on the **“[forEach:]”** tag that was inserted in your template and click the **“Edit Tag”** button in the Windward ribbon to open the Tag Editor.



18. To separate each output by a new slide, select the Properties pane in the Tag Editor. Open the drop down menu for the “**Advanced**” tab and set the break value to 1.



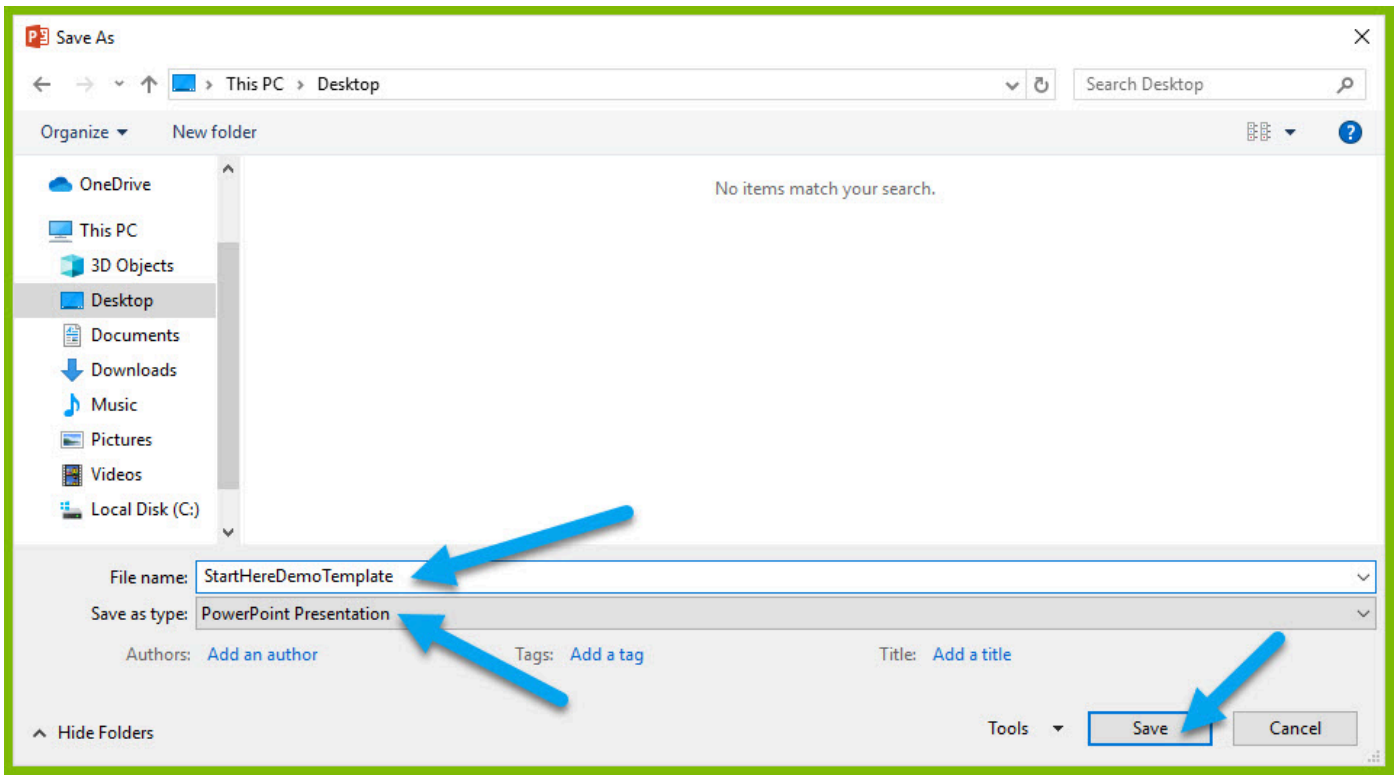
19. Click “**Save Tag**” button to save your tag's query.



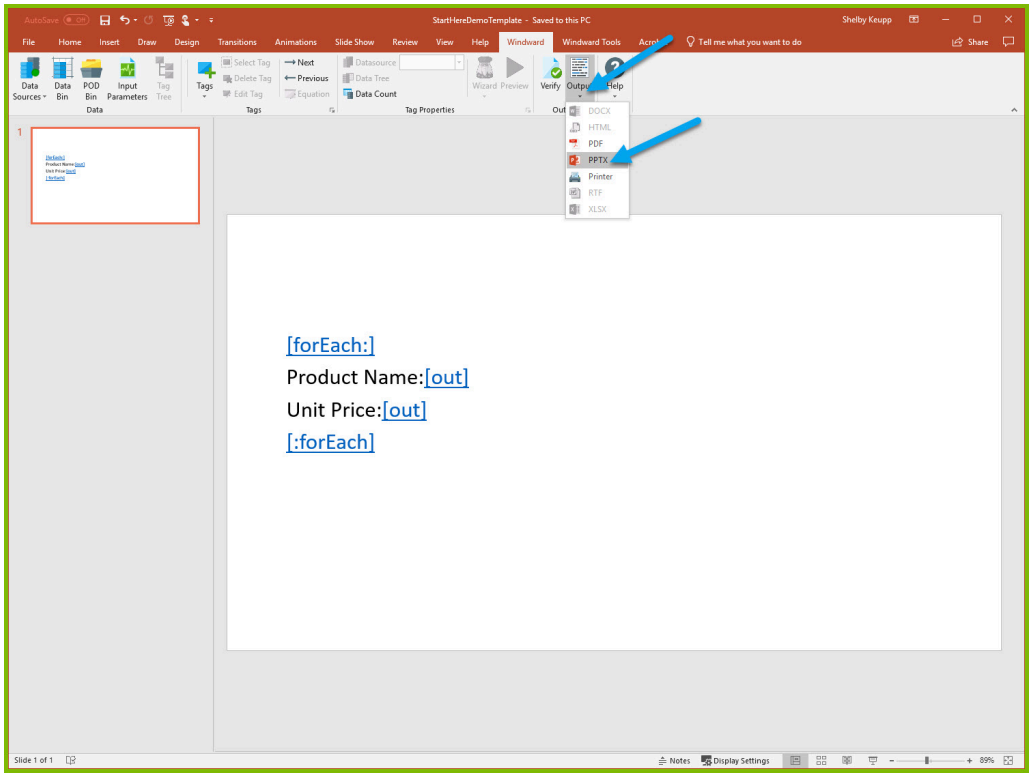
Now you are all finished with your template design!

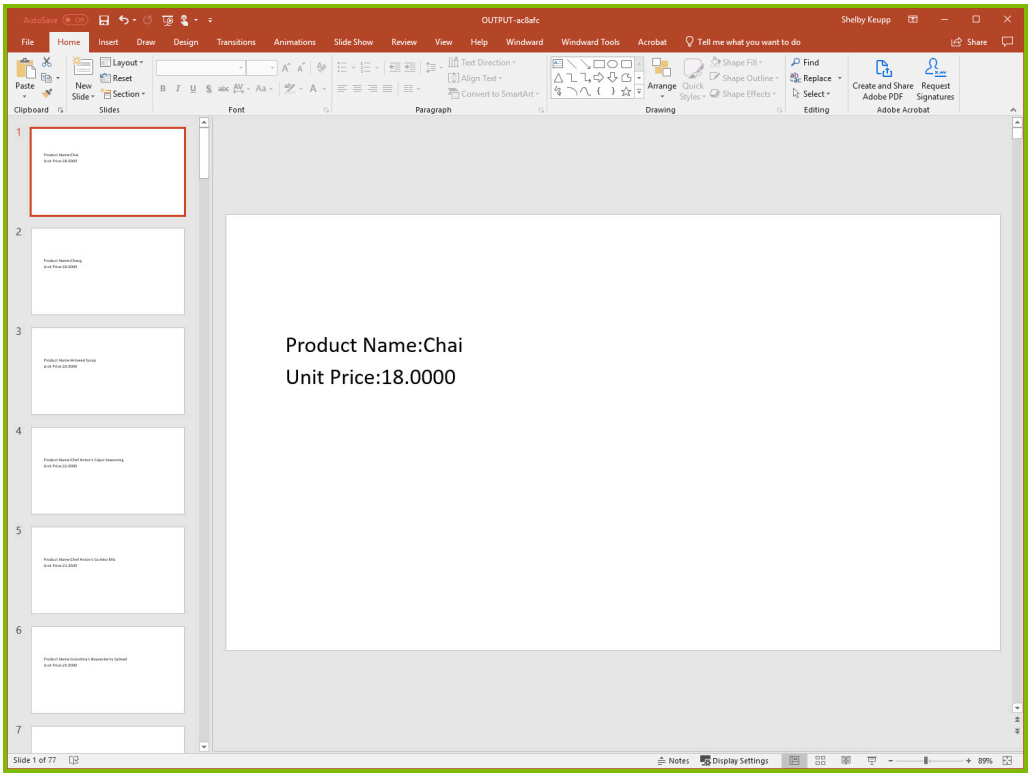
Step 4 - Output

1. Save your template. You can save your template to anywhere you want on your machine and give it any name you want. Be sure to save it as a ".pptx" document.



2. In the “Windward” tab, click the “**Output**” button and from the drop down select “PPTX.”





Your template will output, and you should see a list of product names and their unit price with each product separated by a new slide.

Congratulations! You have created your first template in Windward Designer and produced your first output!

Next Steps

Now that you have finished this introduction tutorial, here are some resources we recommend you visit next:

1. How to connect to JSON datasources
2. How to use the XPath Wizard
3. The Windward Tutor: A collection of short video tutorials
4. Creating an Invoice in Windward Designer

Creating a Template in PowerPoint with SQL Data

Training Guide

Welcome to Windward Designer

Windward Studios takes a unique approach to reporting. Our Report Designer sits directly inside Microsoft Office which means you get to use a **familiar and powerful tool** without having to learn a new designer. If you've ever used one of our competitors' products, you may be familiar with their modular designers that require you to build reports using bits and pieces, where every bit of text or every piece of data is a distinct object in your template. Windward changes all of that. With Windward in Microsoft Office, you **design report templates just like you design any other document**, utilizing Tags to insert your data wherever you need it seamlessly in-line with your other text and content.

Training Overview

This Training Guide walks you through the fundamental steps you need to begin designing templates with Windward Designer in Microsoft PowerPoint using a SQL Datasource.

The Four Steps to Windward:

1. Install
2. Connect to data
3. Design your template & insert your data
4. Output

Step 1 - Install

To get started, you need to install the Designer. If you have it already installed, please skip this step!

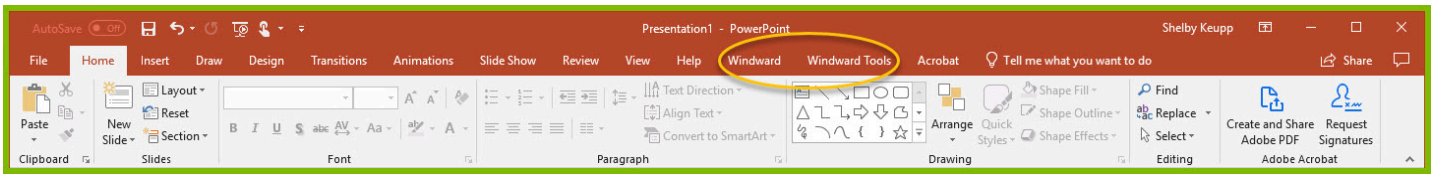
If you already have a license key, please visit the downloads page to install the software.

Or start a free 14-day trial!

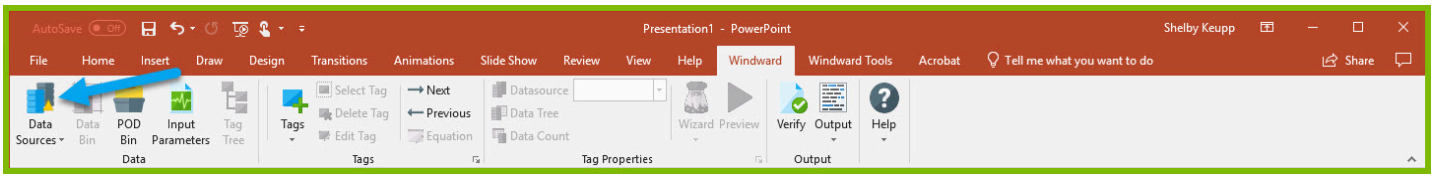
Step 2 - Connect to Data

In this training guide, you are connecting to a sample SQL Datasource provided by Windward.
To connect to the sample data:

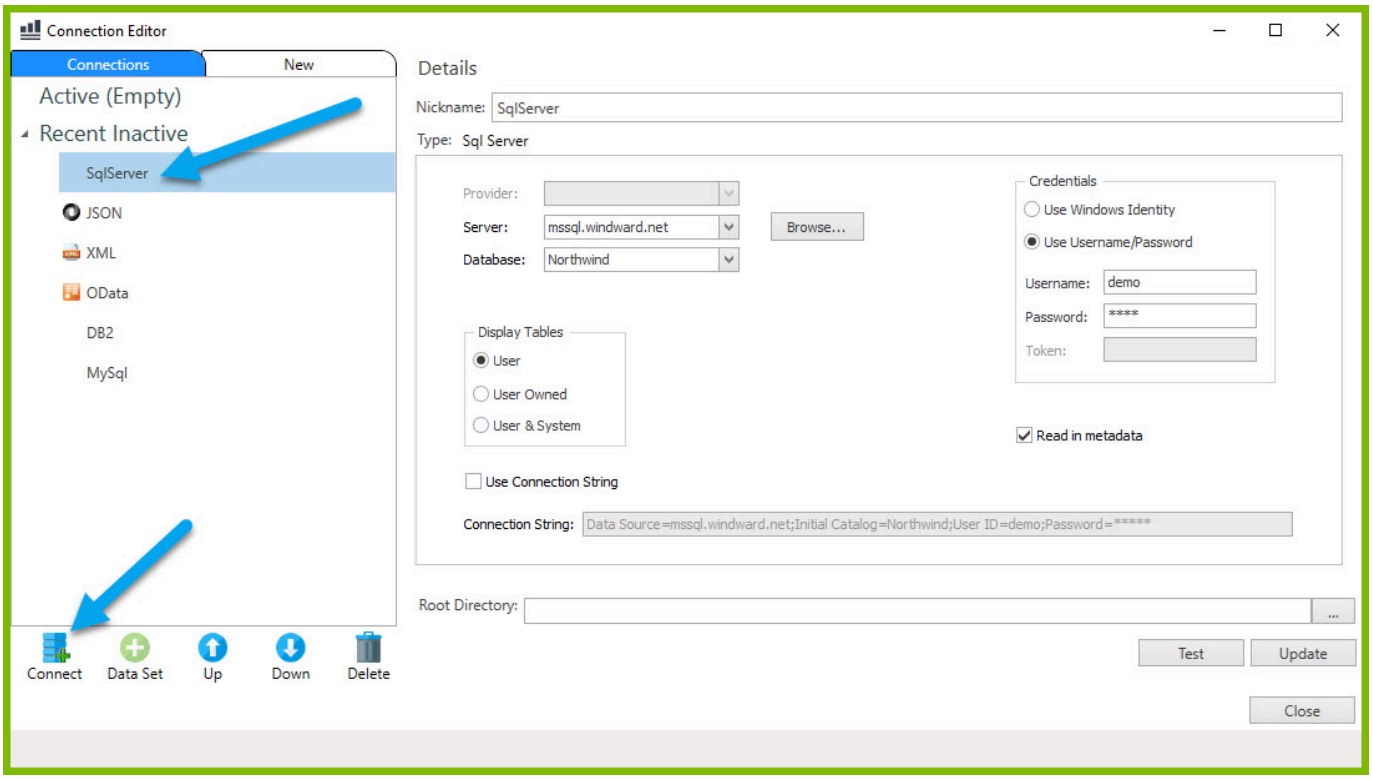
1. Open Microsoft PowerPoint. Now that you've installed Windward Designer, you will see two new tabs in the Microsoft Office Ribbon – the "**Windward**" Tab and the "**Windward Tools**" Tab.



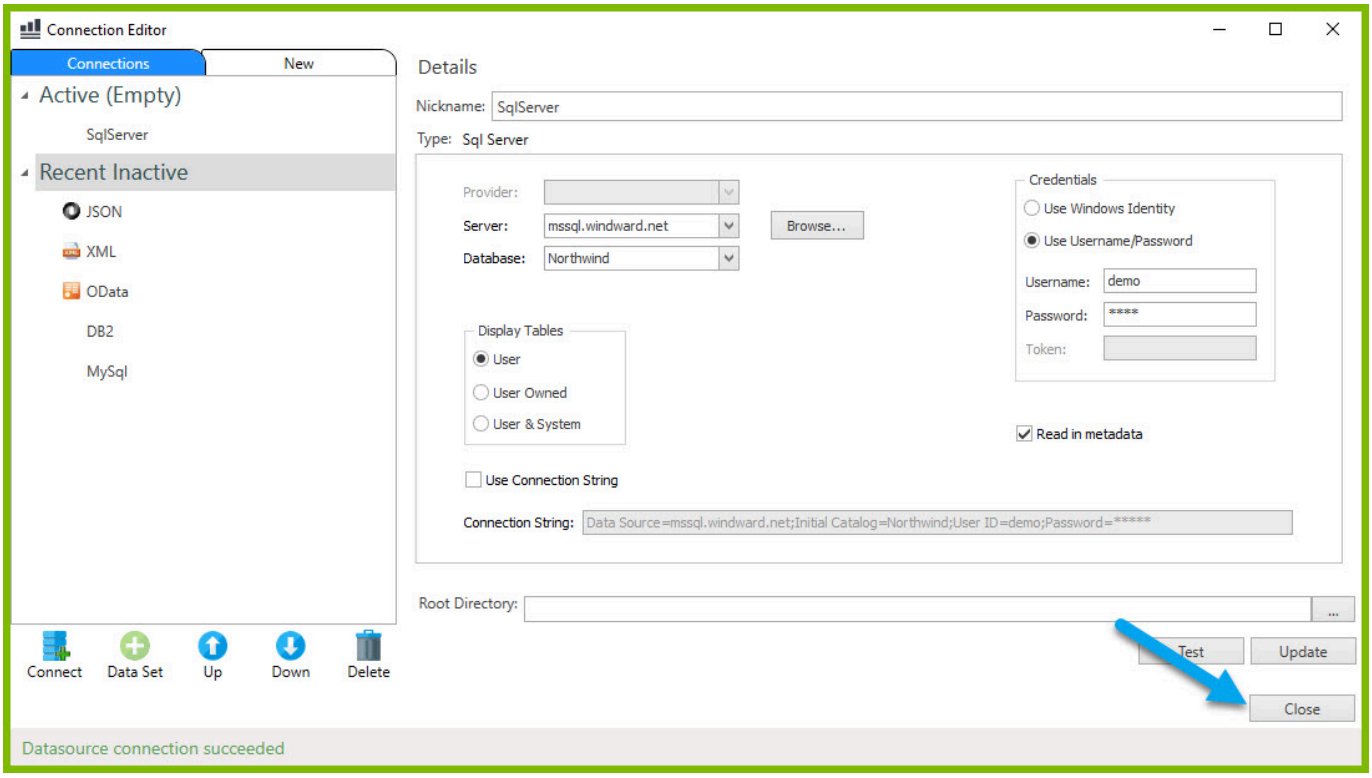
2. Click on the **"Windward" Tab** and click on the **"Data Sources"** button located on the left-hand side of the ribbon. This opens the Connection Editor where you will manage all your data connections. (Alternatively, you can click on the lower half of the button to expand the drop down and then click **"Data Sources."**)



3. In the Connection Editor window, select the data connection labeled "**SQLServer**" under "Recent Inactive" and click the "**Connect**" button.



4. Close the Connection Editor by clicking **"Close."** You have now successfully connected to the sample data!



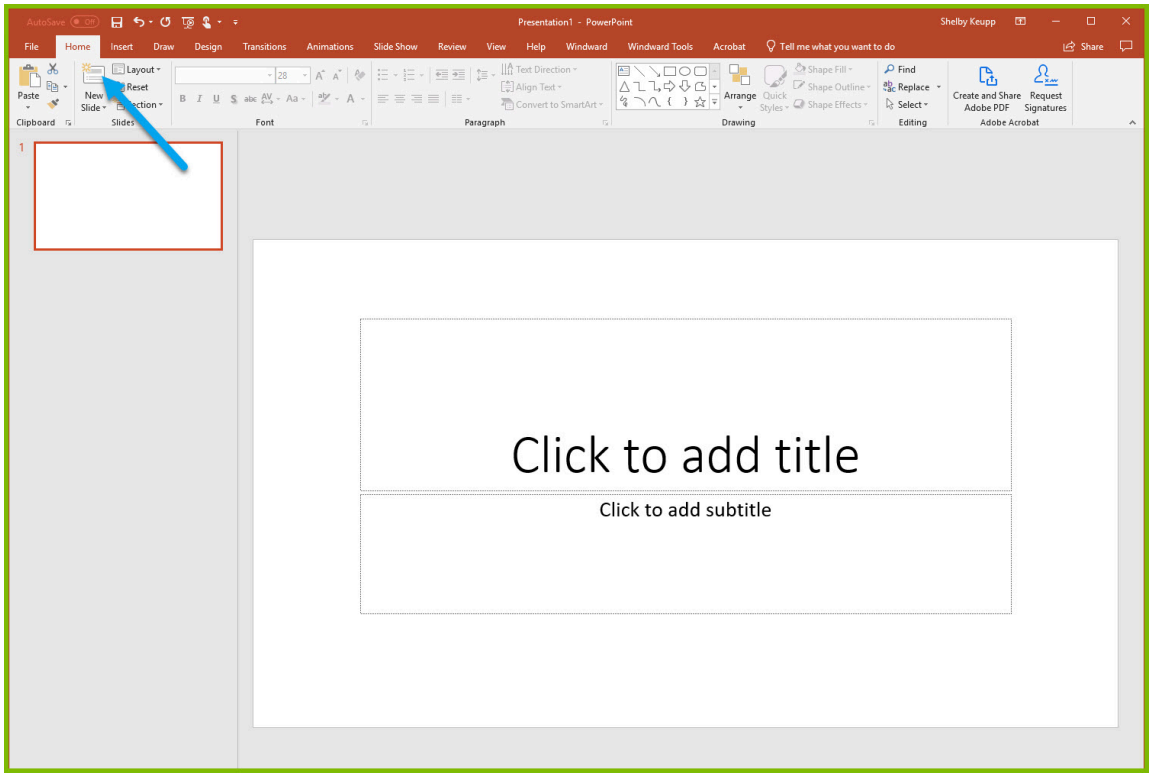
Step 3 - Design Your Template & Insert Your Data

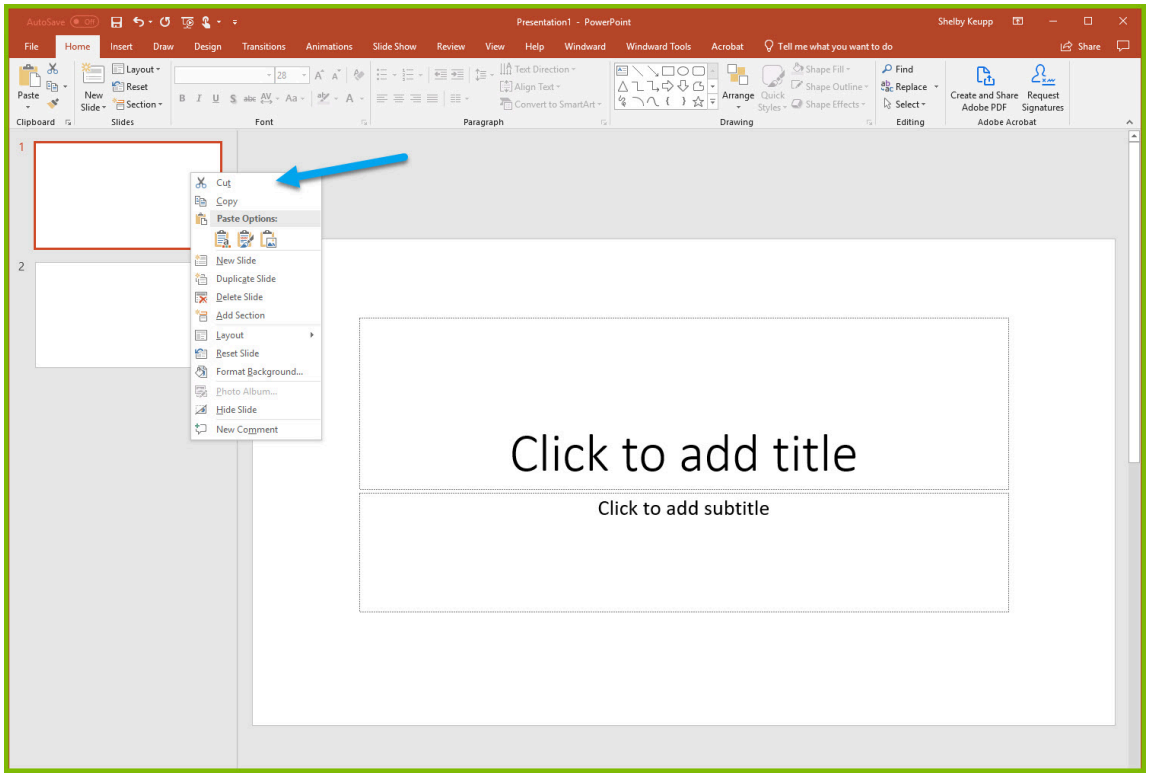
In this training guide, you will build a very basic template to get the feel of Windward Designer. While your final product may not seem very impressive, you will learn the basic skills to making any template! You will make a template which will output the product name and unit price for every product in the sample data, with each product separated by a new slide.

In situations where you want to output many records returned from a select, you can use a ForEach tag. The ForEach tag will generate output once for each record returned by its select. The ForEach tag itself will not insert data into the template, but rather stores data in a variable that can be used by other tags to generate output.

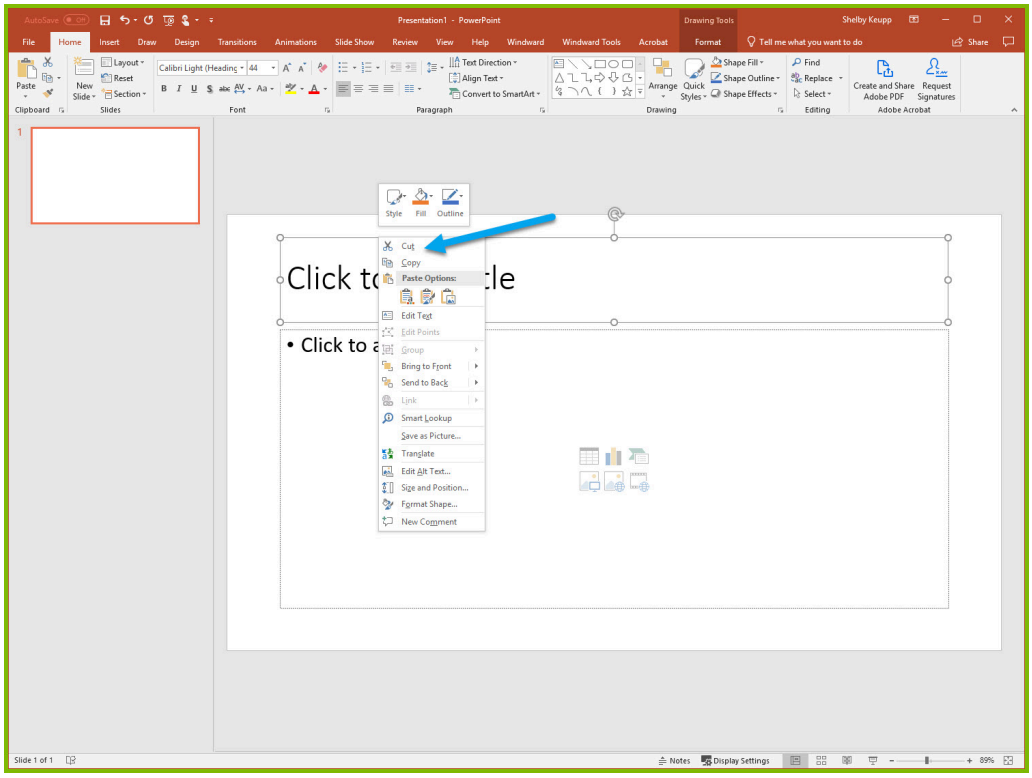
For this example, we will use a new "**Title and Content**" template.

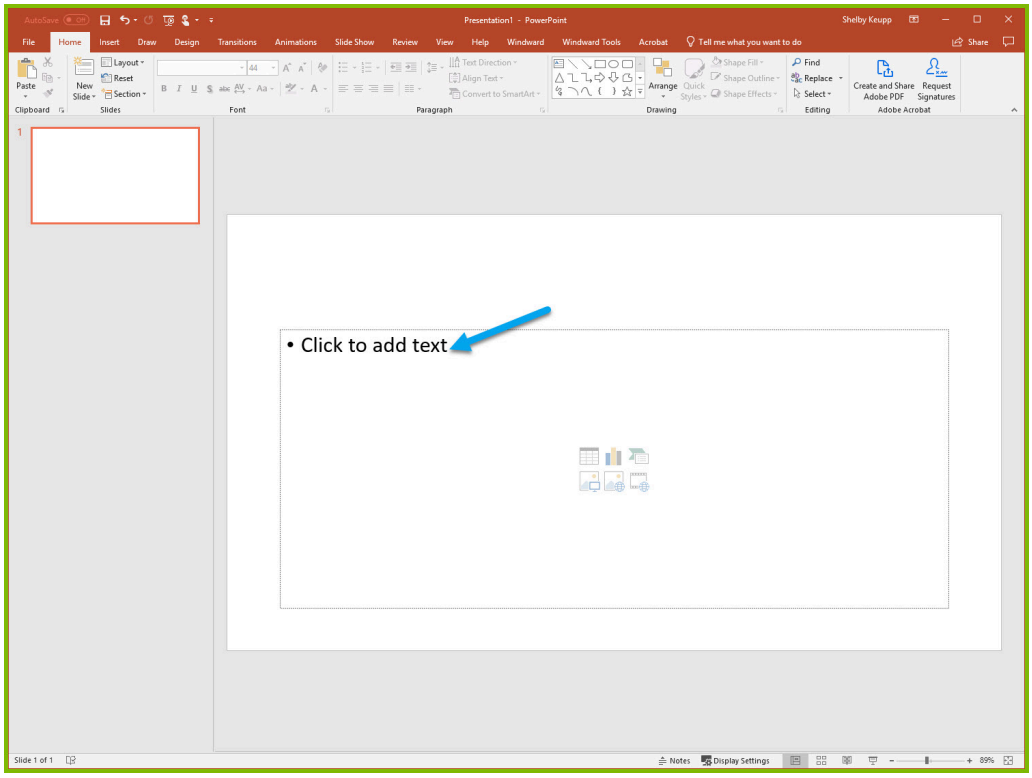
1. Click on the “**New Slide**” button to create a new slide, then delete the original Title slide.



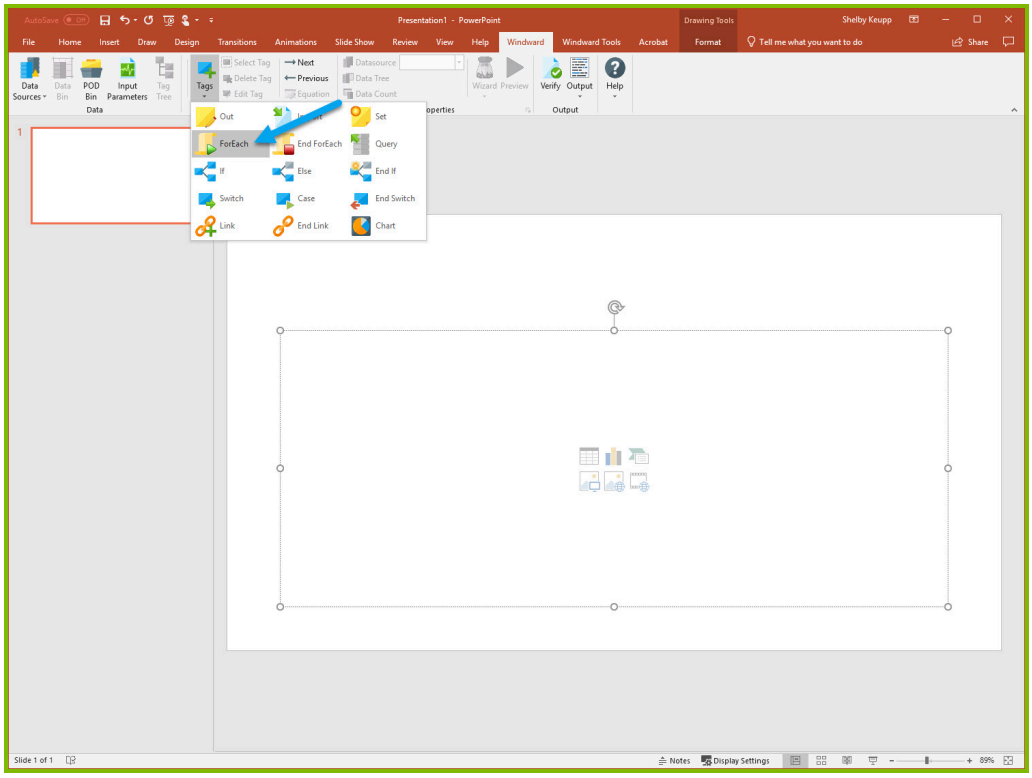


2. Click on the top text box that is labelled "**Click to add title**", then press Delete to remove the extra text box. Now click inside the remaining text box and hit the backspace button to delete the bullet point.

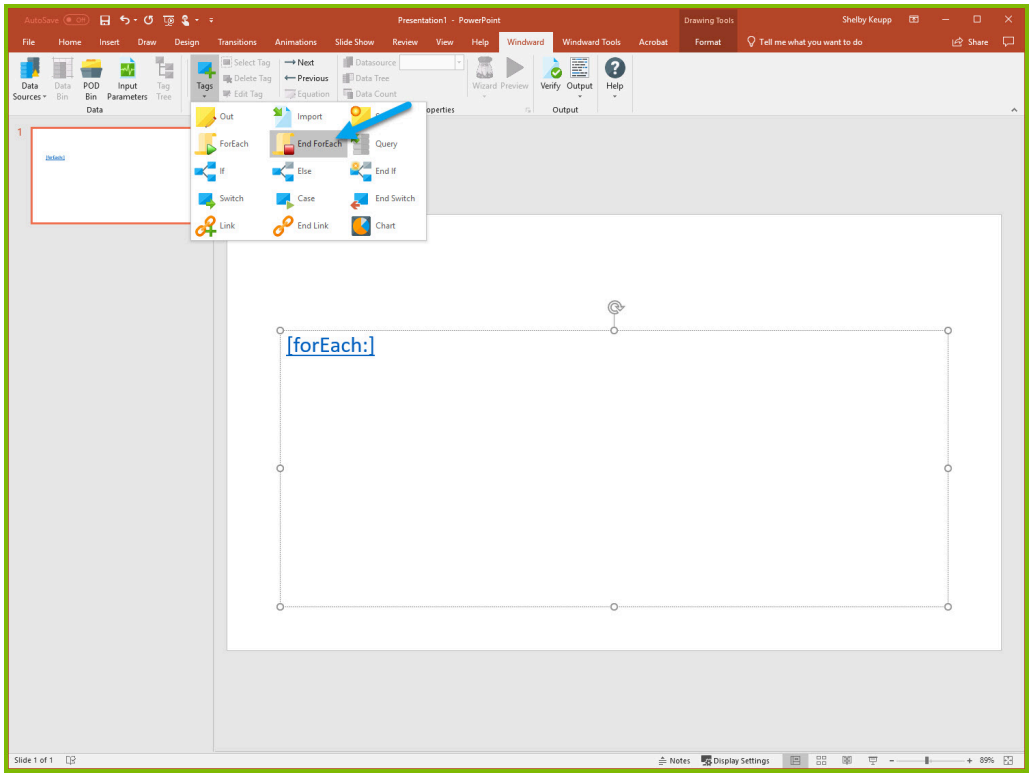




3. To place a ForEach tag, expand the drop down under the button "**Tags**" in the Windward ribbon and click "**ForEach**."

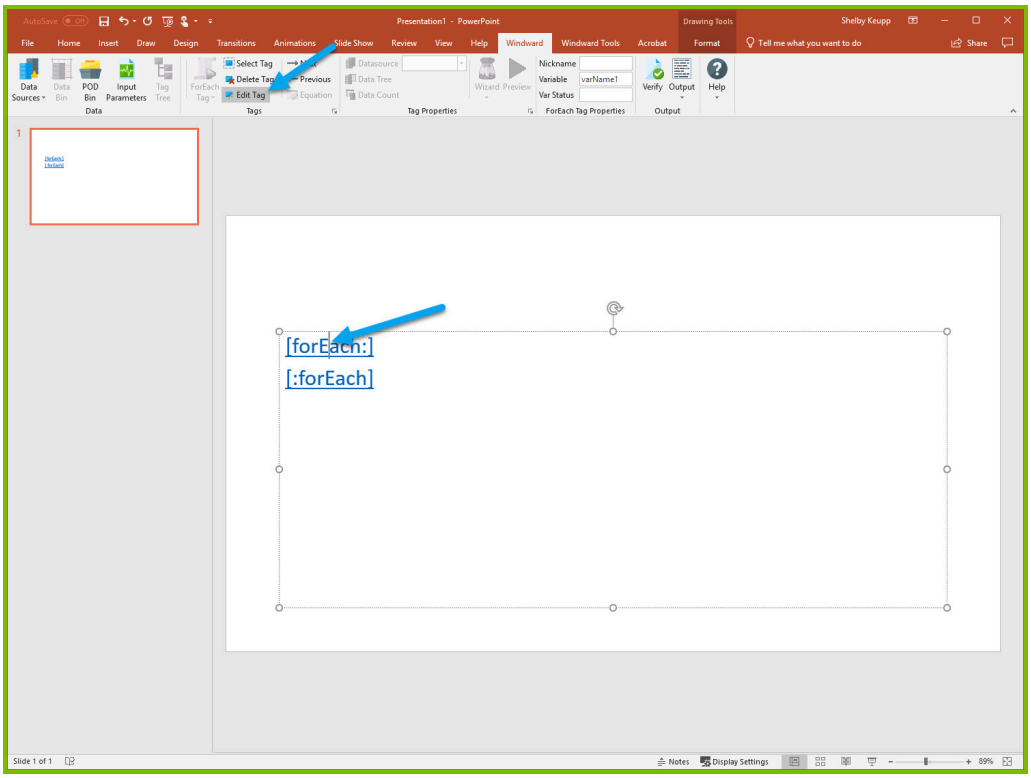


4. Click enter to move to a new line, expand the drop down under the button "**Tags**" in the Windward ribbon, and click "**EndForEach**" to place a closing tag for the ForEach tag.

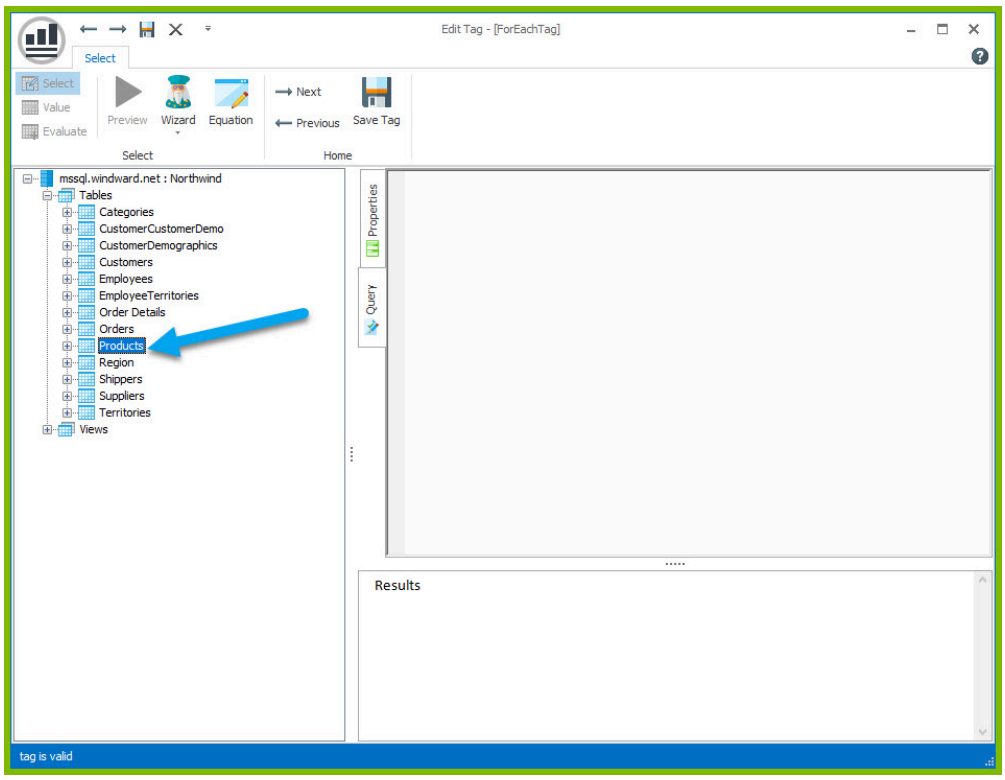


Now all the content that you place between the ForEach and EndForEach tags will be generated once for each record returned by the ForEach tag's select

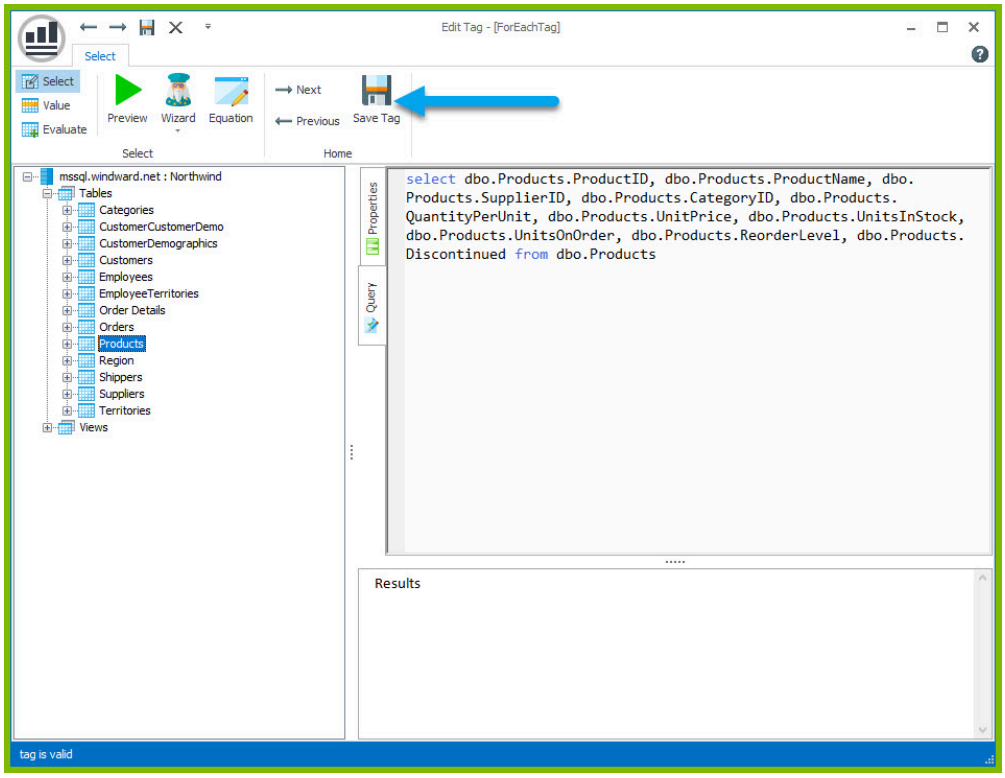
5. For the ForEach tag, you will select the Product table so that you can output information on each product. You can use the Tag Editor to easily create a query for your tag. Place your cursor on the **"[forEach:]"** tag that was inserted in your template and click the **"Edit Tag"** button in the Windward ribbon to open the Tag Editor.



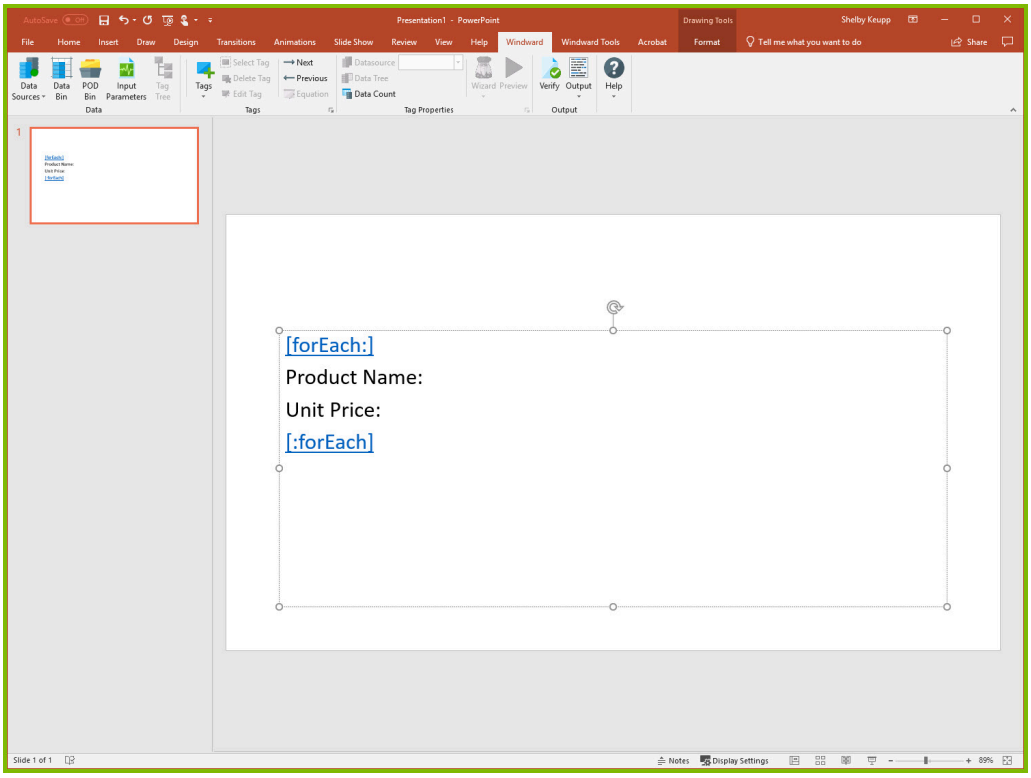
6. In the Tag Tree, expand the table mssql.windward.net : Northwind -> Tables and double-click the **"Products"** table. This will automatically write a select for the Products table.



7. Click the "**Save Tag**" button. Congratulations! You have just inserted your first tag into your template!



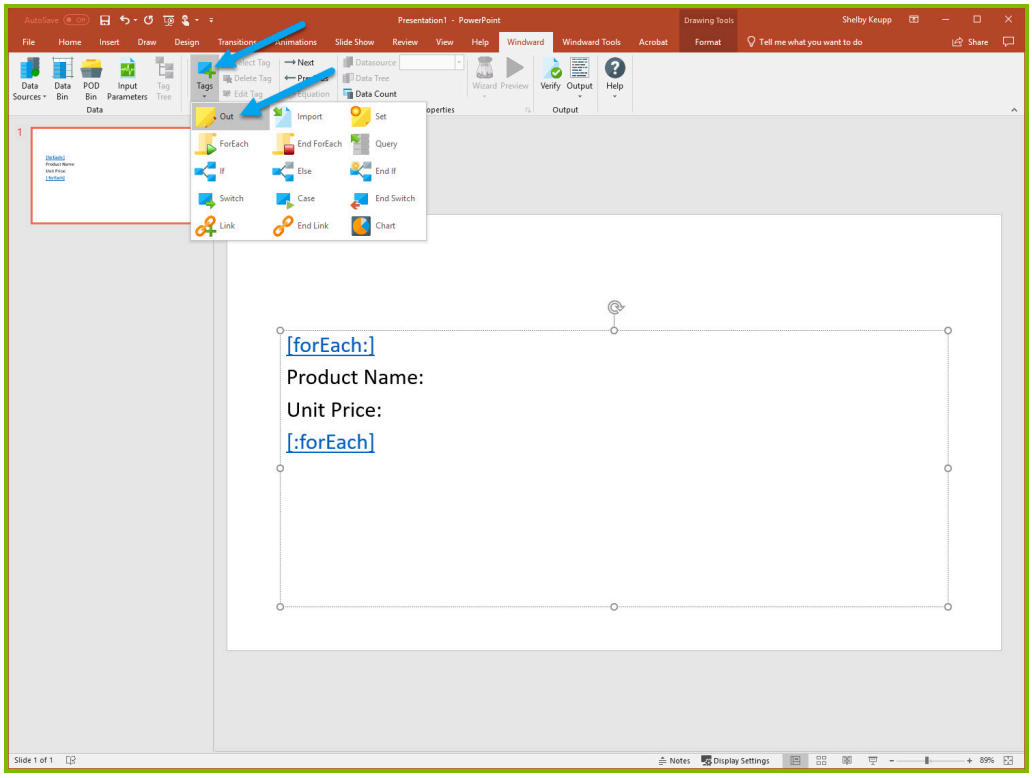
8. On a new line after the ForEach tag, enter the text "Product Name:" and on the next line "Unit Price:".



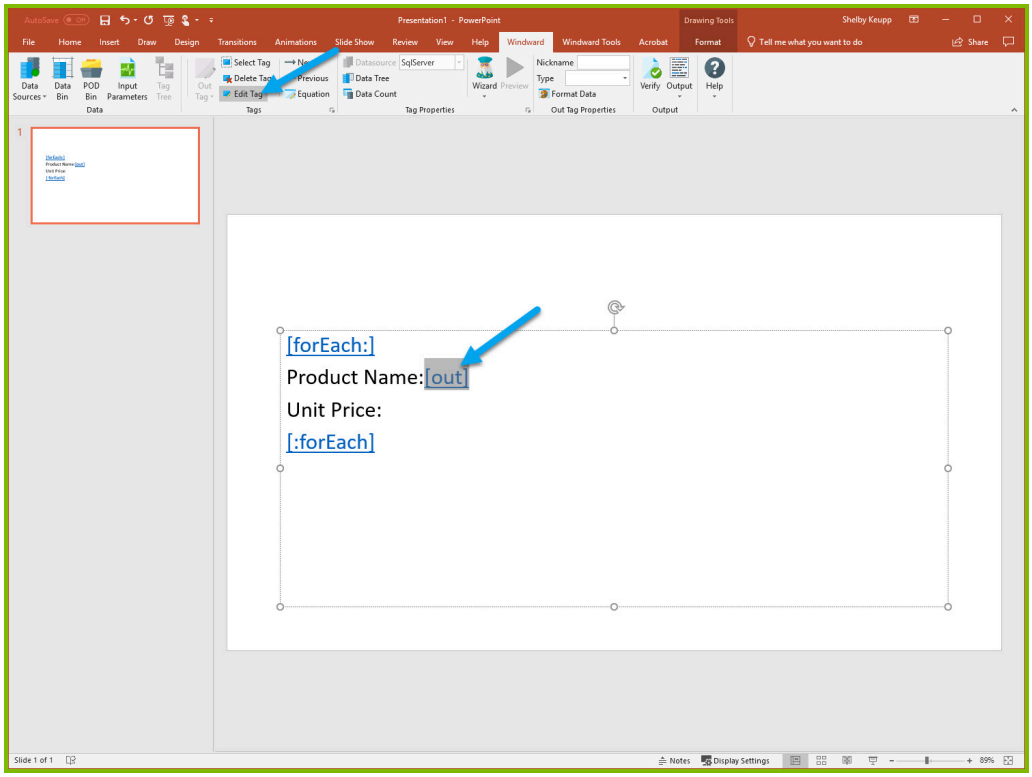
The “Product Name” and “Unit Price” text will be output for every product returned by your ForEach tag’s select.

Out tags will be used to insert data into your final report. These tags will output the Product Name and Unit Price for each product after these labels.

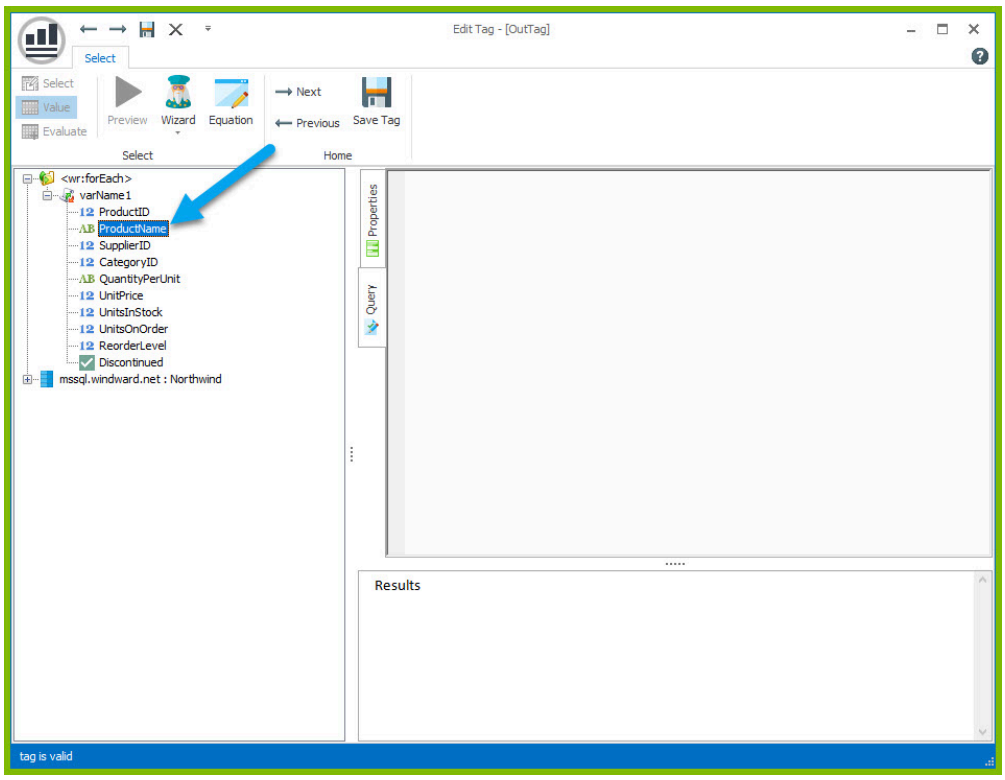
9. Place your cursor after the “Product Name:” text, click “**Tags**” in the Windward ribbon, and click **“Out.”** This places an Out tag at the location of the cursor.



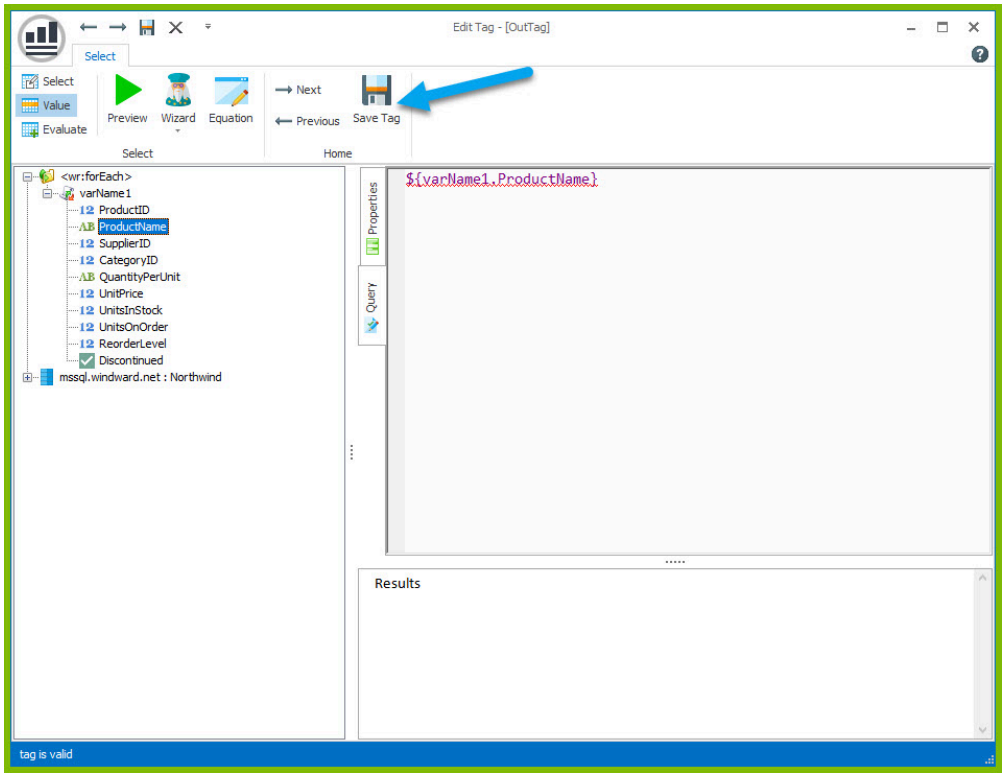
10. Open the tag Editor by placing your cursor on the Out tag and clicking "**Edit Tag**."



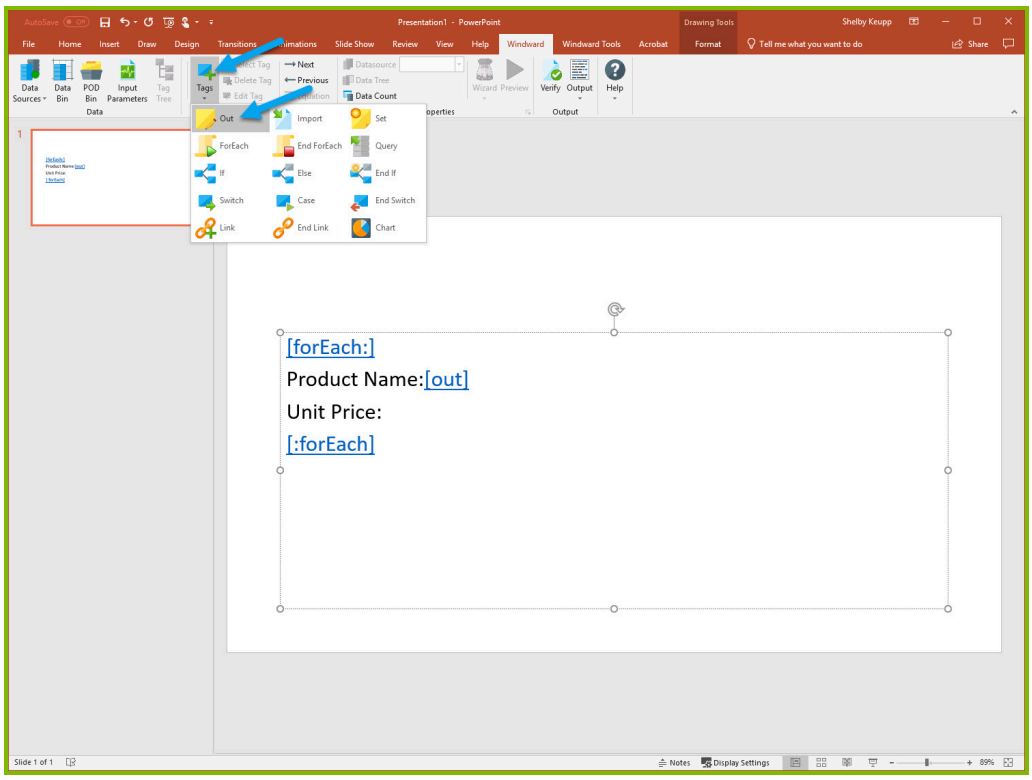
11. You can now see your ForEach variable in the tag editor since the Out tag occurs in the template between the ForEach tag and the EndForEach tag. In the Tag Tree, expand <wr:forEach> -> varName1 and double-click **"ProductName."** This automatically queries the ProductName currently held by the ForEach variable.



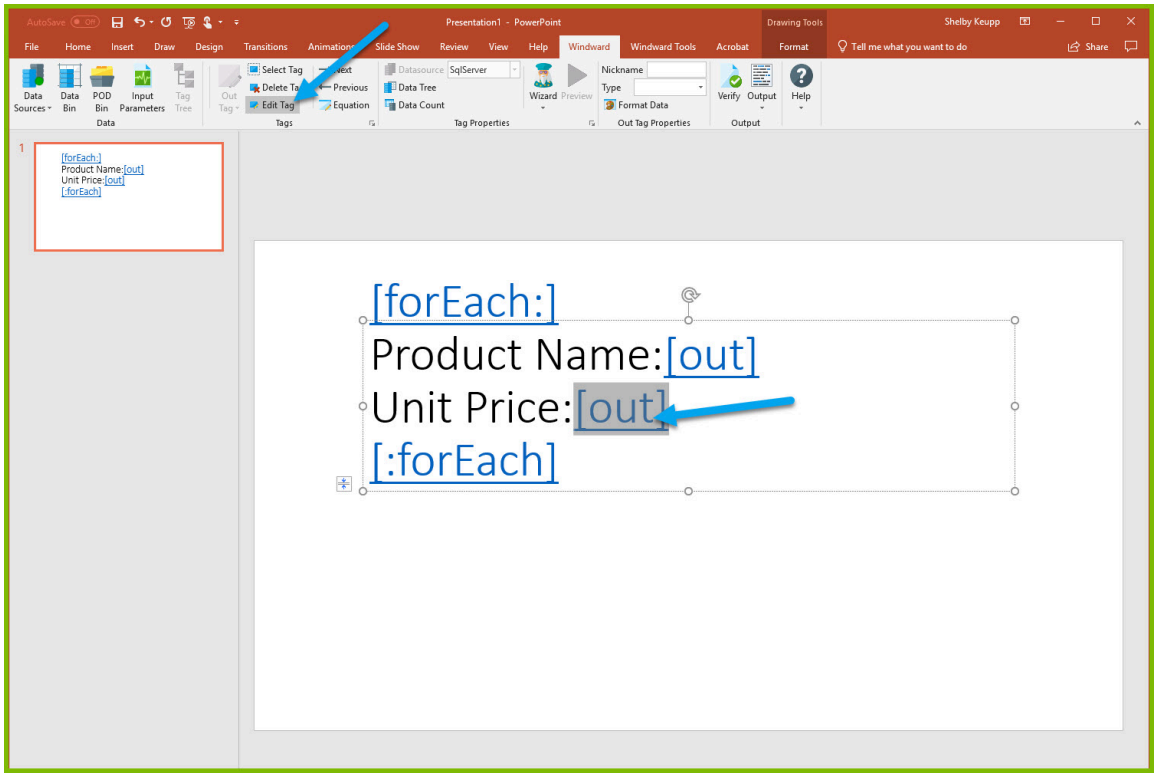
12. Click "**Save Tag**" button to save your tag's query.



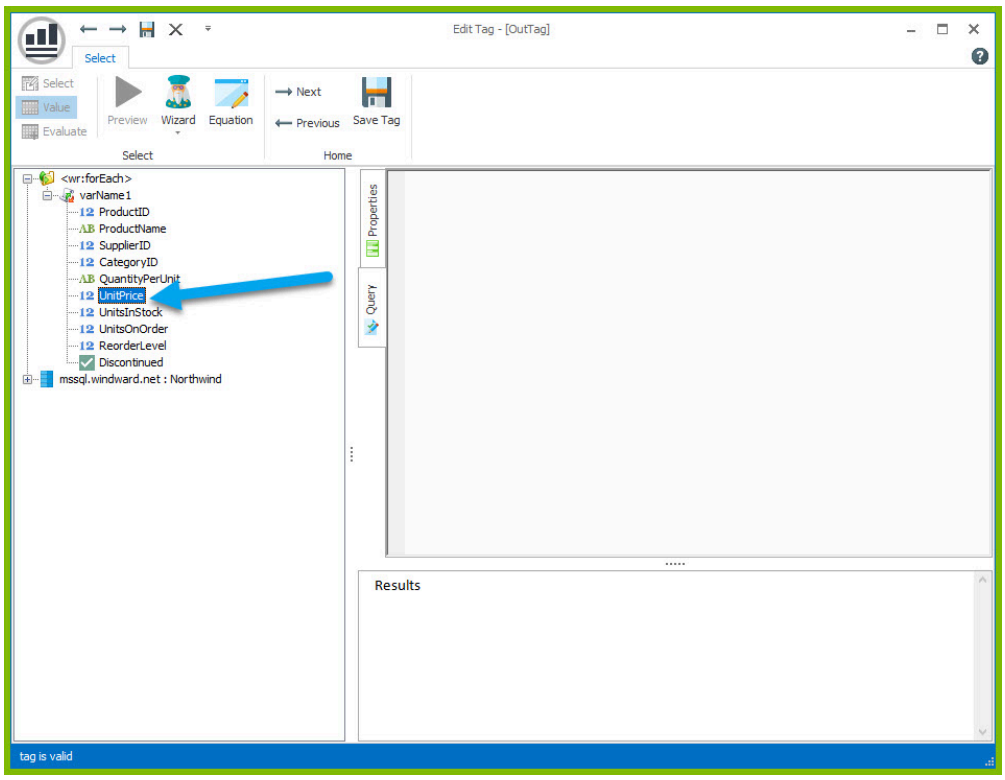
13. Place your cursor after the "Unit Price:" text and click "Tags" in the Windward ribbon and click "**Out**." This places an out tag at the location of the cursor.



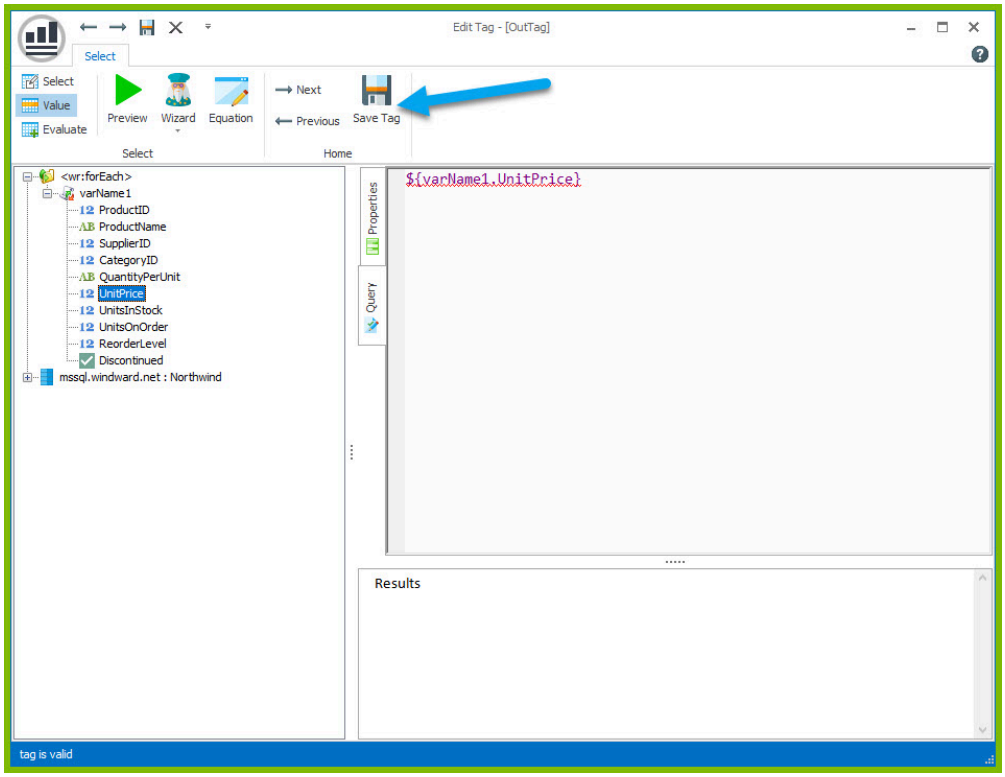
14. Open the tag Editor by placing your cursor on the Out tag and clicking "**Edit Tag**."



15. You can now see your ForEach variable in the tag editor since the Out tag occurs in the template between the ForEach tag and the EndForEach tag. Expand <wr:forEach> -> varName1 and double click UnitPrice. This automatically queries the UnitPrice currently held by the ForEach tag.

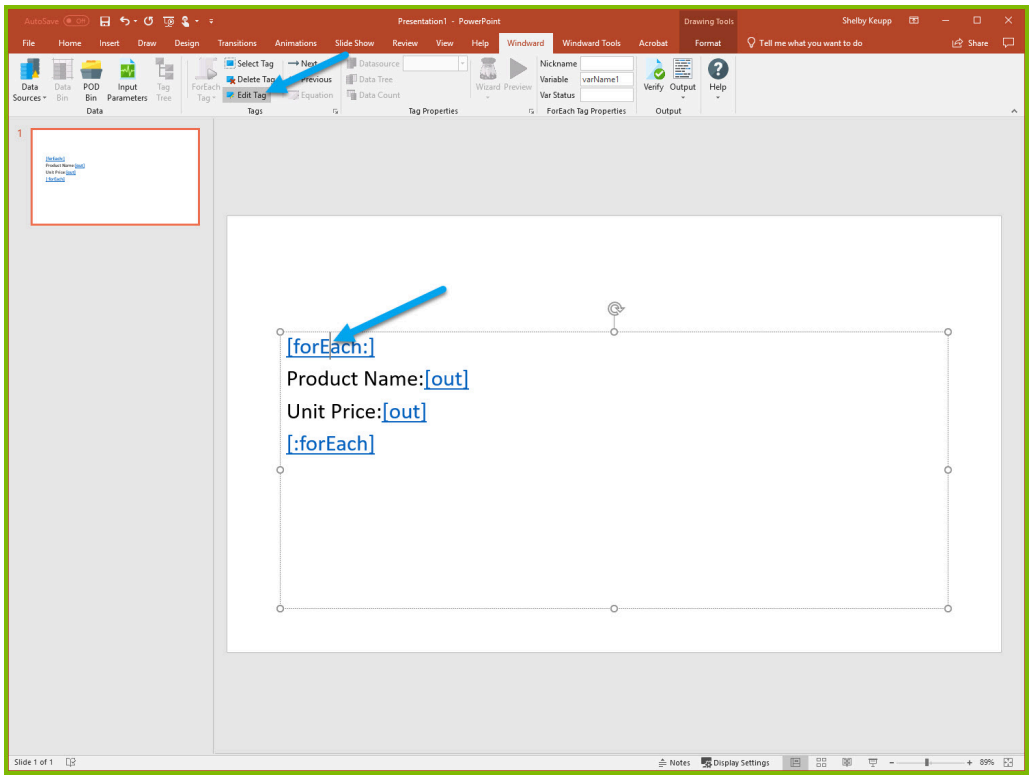


16. Click the **"Save Tag"** button to save your tag's query.

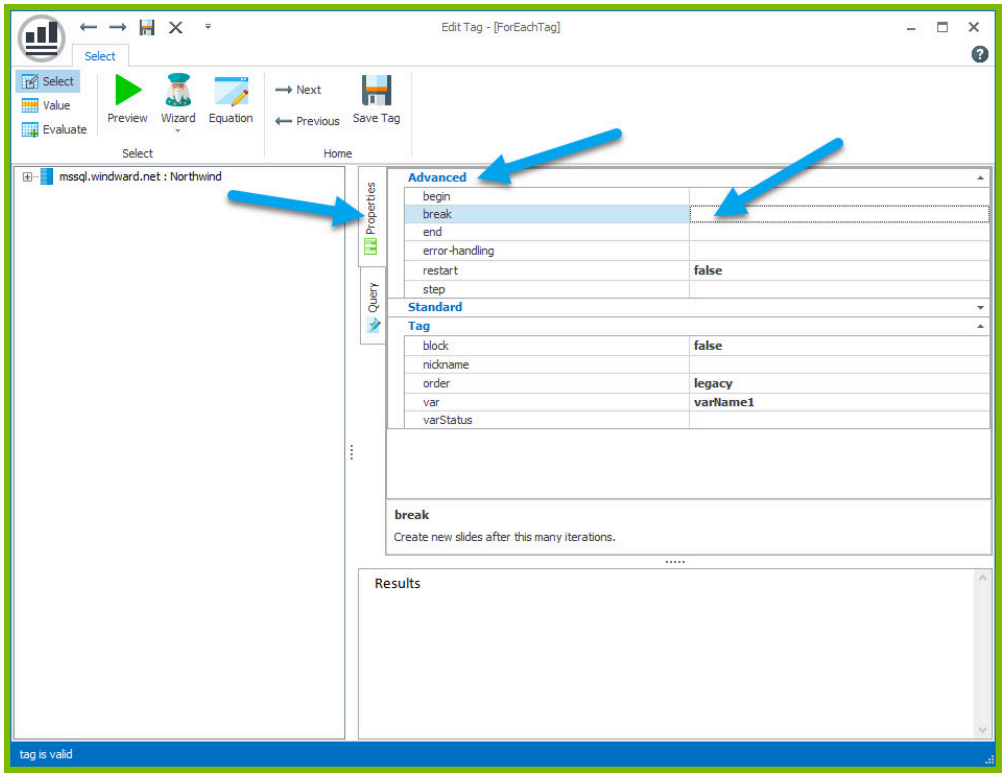


Finally, you are going to add some indicator between each product, so you can easily distinguish between them in your output. Each output will be on its own slide.

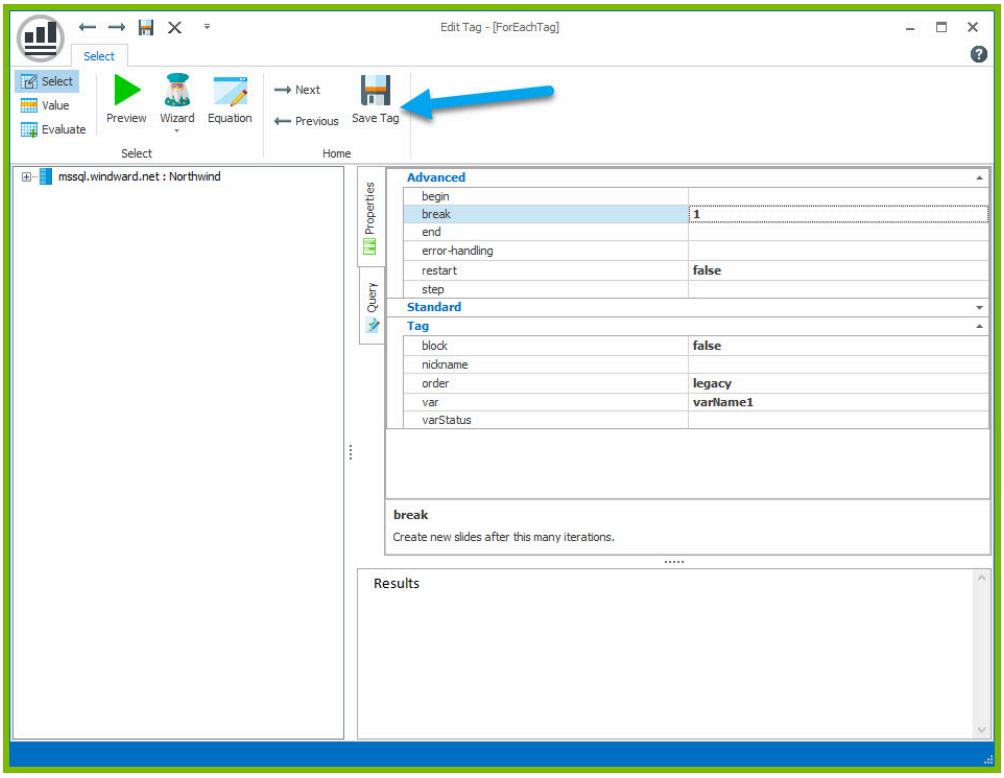
17. Place your cursor on the **“[forEach:]”** tag that was inserted in your template and click the **“Edit Tag”** button in the Windward ribbon to open the Tag Editor.



18. To separate each output by a new slide, select the Properties pane in the Tag Editor. Open the drop down menu for the “**Advanced**” tab and set the break value to 1.



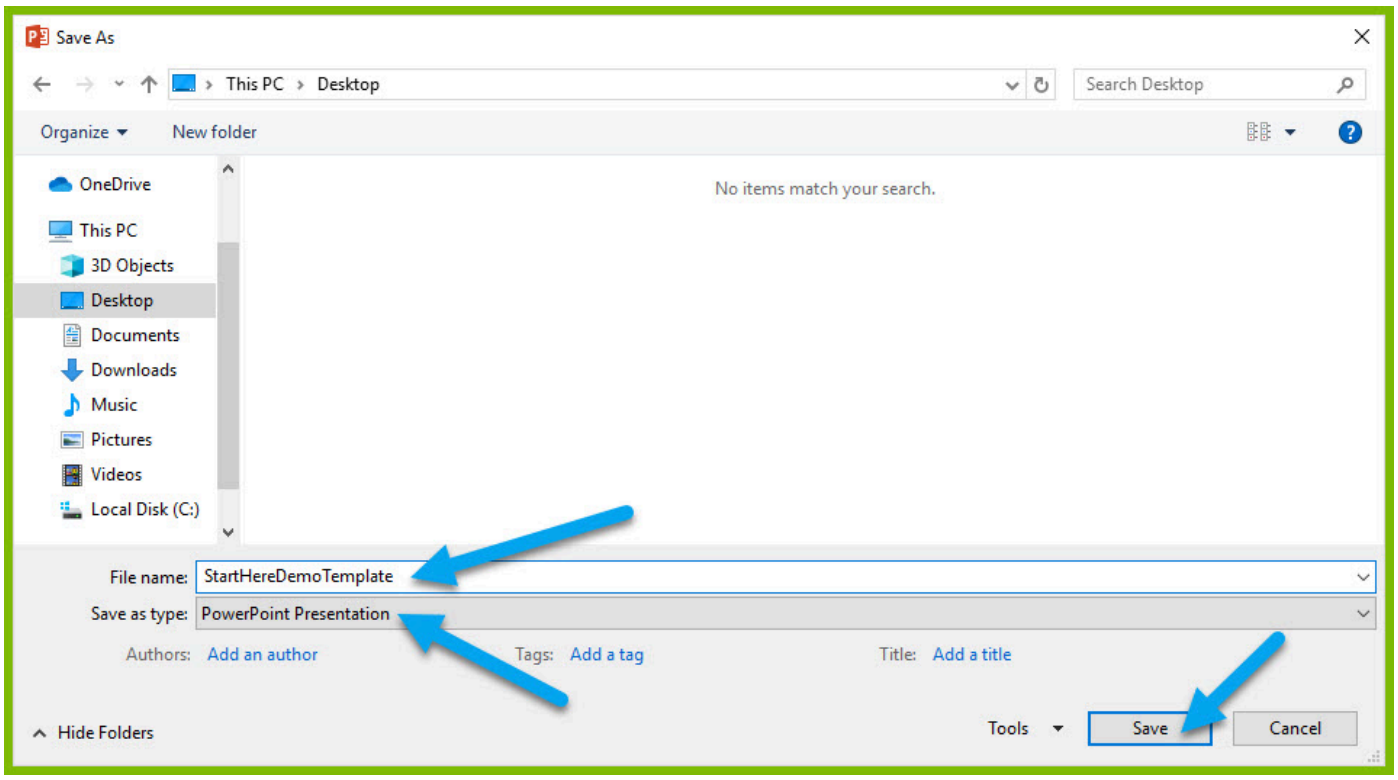
19. Click “**Save Tag**” button to save your tag's query.



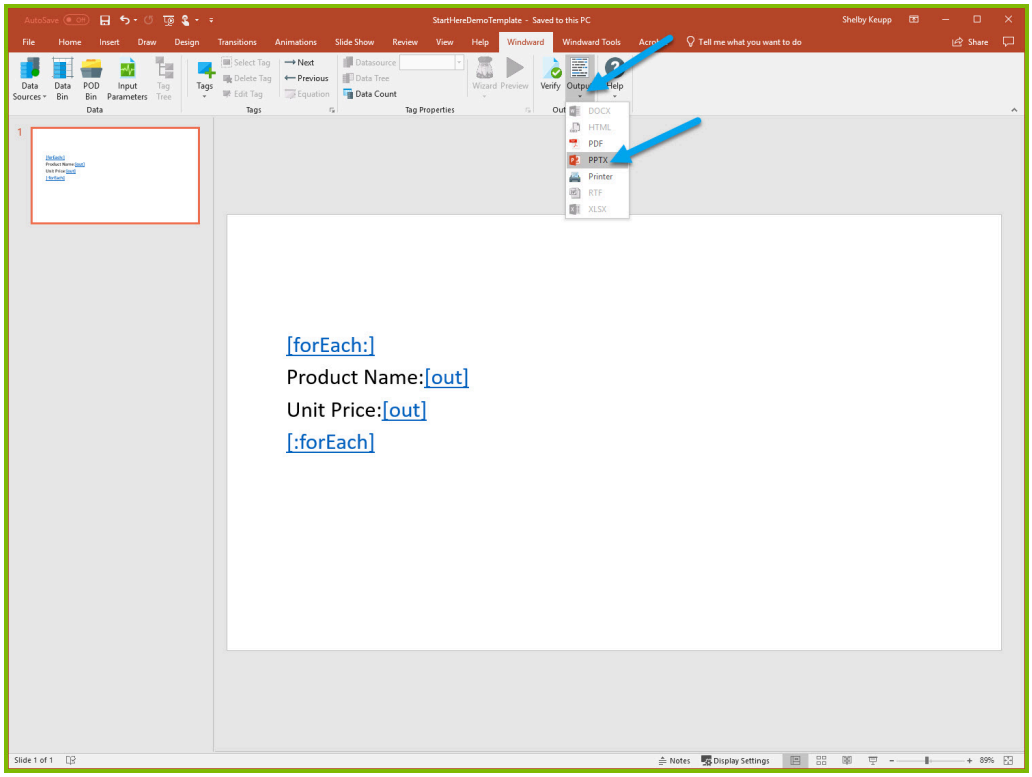
Now you are all finished with your template design!

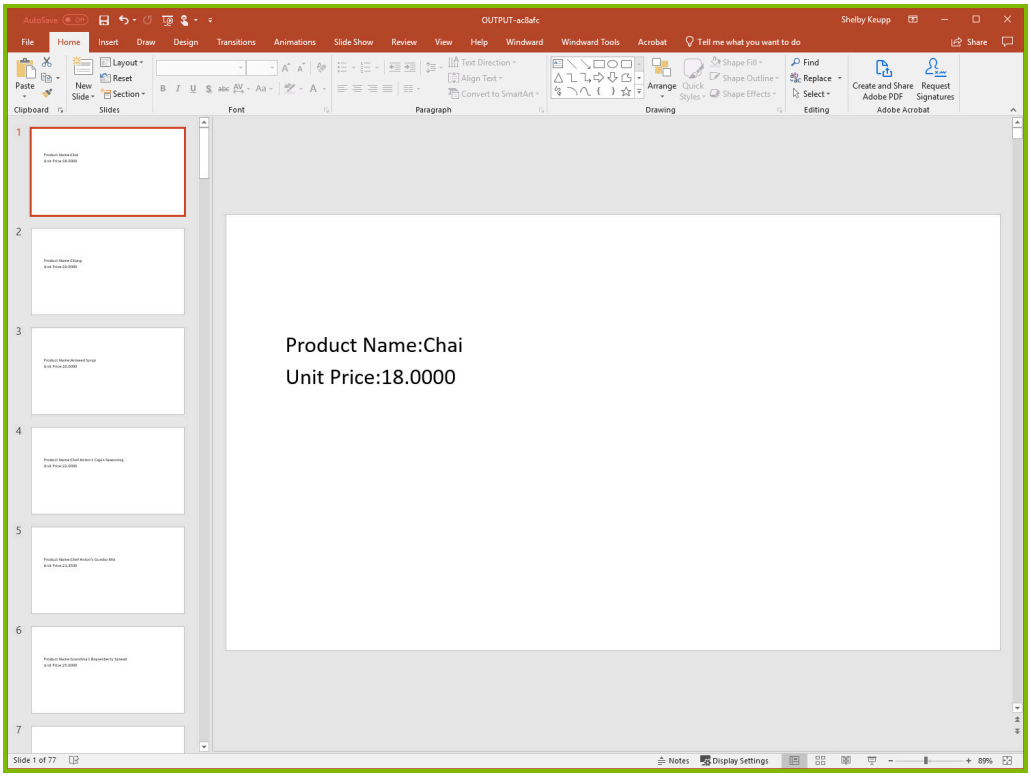
Step 4 - Output

1. Save your template. You can save your template to anywhere you want on your machine and give it any name you want. Be sure to save it as a ".pptx" document.



2. In the “Windward” tab, click the “**Output**” button and from the drop down select “PPTX.”





Your template will output, and you should see a list of product names and their unit price with each product separated by a new slide.

Congratulations! You have created your first template in Windward Designer and produced your first output!

Next Steps

Now that you have finished this introduction tutorial, here are some resources we recommend you visit next:

1. How to connect to SQL datasources
2. How to use the XPath Wizard
3. The Windward Tutor: A collection of short video tutorials
4. Creating an Invoice in Windward Designer

Creating a Template in PowerPoint with XML Data

Training Guide

Welcome to Windward Designer

Windward Studios takes a unique approach to reporting. Our Report Designer sits directly inside Microsoft Office which means you get to use a **familiar and powerful tool** without having to learn a new designer. If you've ever used one of our competitors' products, you may be familiar with their modular designers that require you to build reports using bits and pieces, where every bit of text or every piece of data is a distinct object in your template. Windward changes all of that. With Windward in Microsoft Office, you **design report templates just like you design any other document**, utilizing Tags to insert your data wherever you need it seamlessly in-line with your other text and content.

Training Overview

This Training Guide walks you through the fundamental steps you need to begin designing templates with Windward Designer in Microsoft PowerPoint using an XML Datasource.

The Four Steps to Windward:

1. Install
2. Connect to data
3. Design your template & insert your data
4. Output

Step 1 - Install

To get started, you need to install the Designer. If you have it already installed, please skip this step!

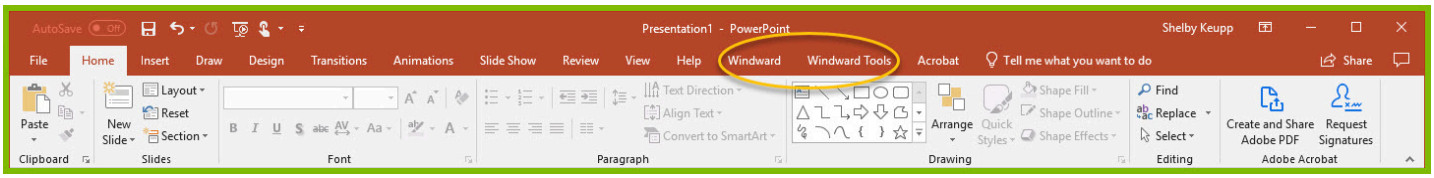
If you already have a license key, please visit the downloads page to install the software.

Or start a free 14-day trial!

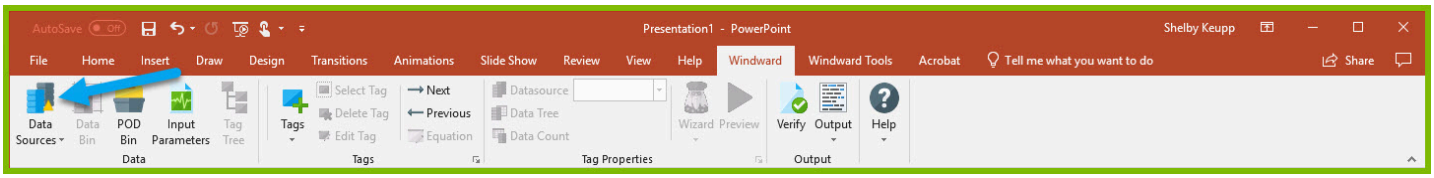
Step 2 - Connect to Data

In this training guide, you are connecting to a sample XML Datasource provided by Windward.
To connect to the sample data:

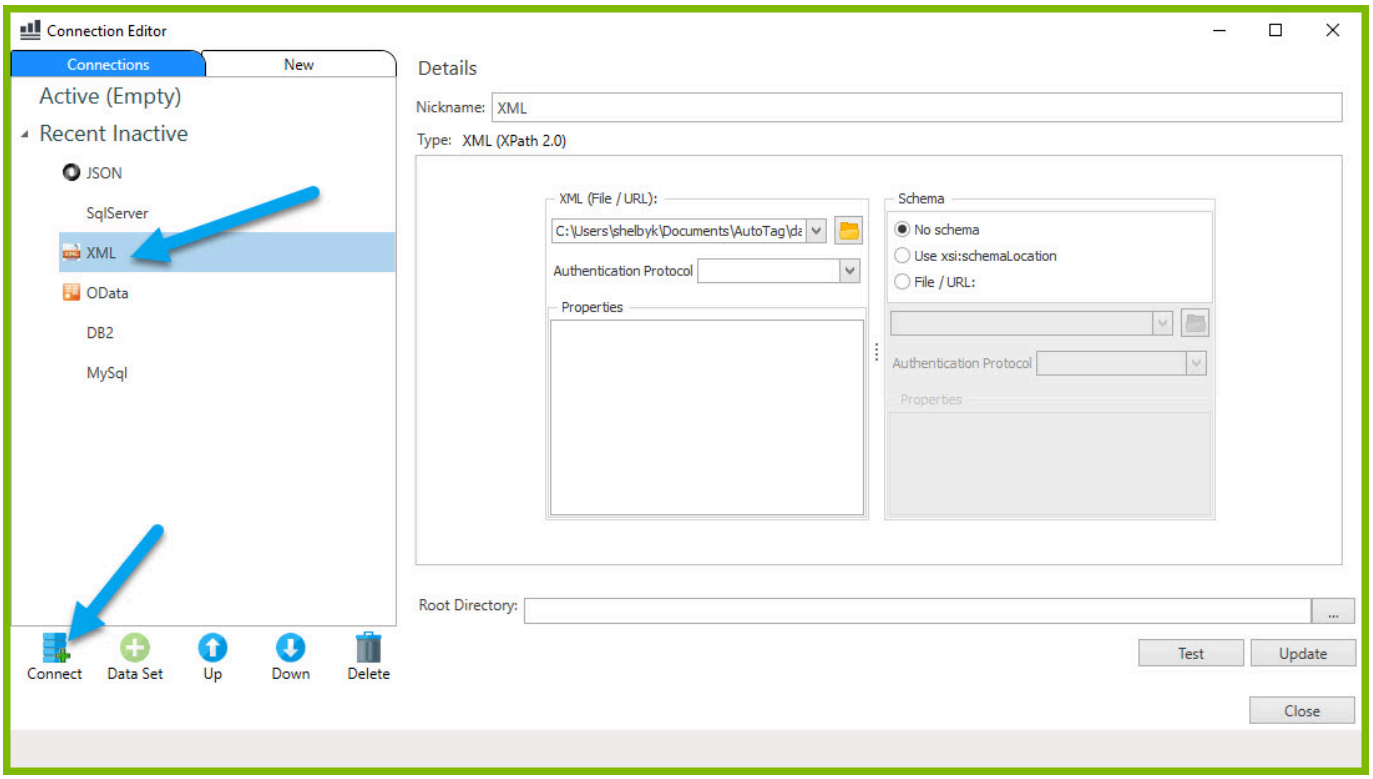
1. Open Microsoft PowerPoint. Now that you've installed Windward Designer, you will see two new tabs in the Microsoft Office Ribbon – the "**Windward**" Tab and the "**Windward Tools**" Tab.



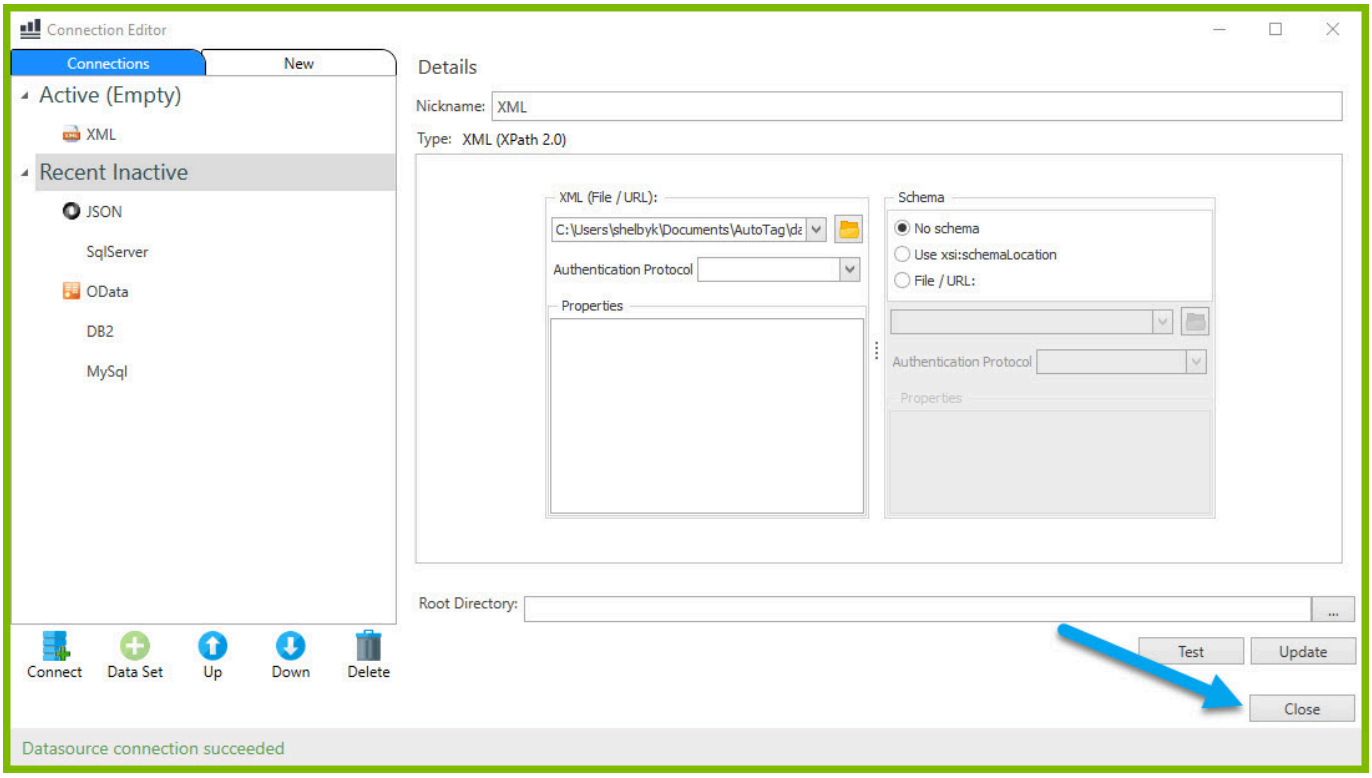
2. Click on the **"Windward" Tab** and click on the **"Data Sources"** button located on the left-hand side of the ribbon. This opens the Connection Editor where you will manage all your data connections. (Alternatively, you can click on the lower half of the button to expand the drop down and then click **"Data Sources."**)



3. In the Connection Editor window, select the data connection labeled "**XML**" under "Recent Inactive" and click the "**Connect**" button.



4. Close the Connection Editor by clicking **"Close."** You have now successfully connected to the sample data!



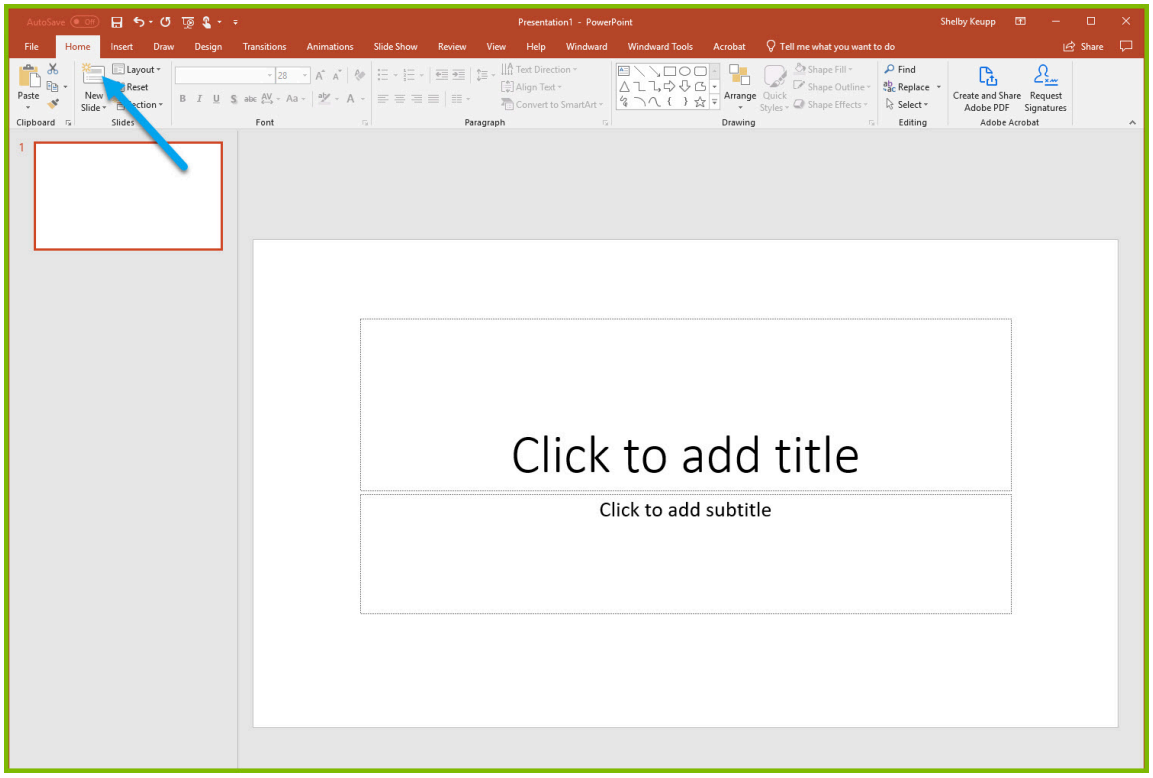
Step 3 - Design Your Template & Insert Your Data

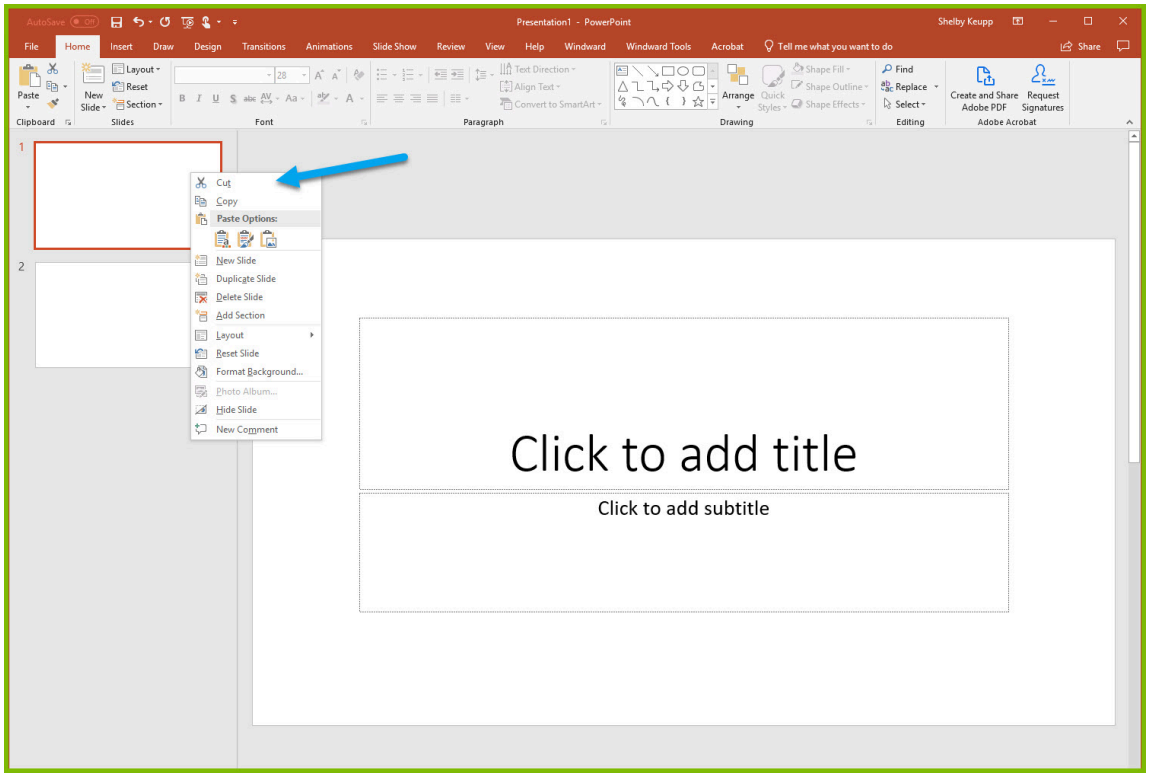
In this training guide, you will build a very basic template to get the feel of Windward Designer. While your final product may not seem very impressive, you will learn the basic skills to making any template! You will make a template which will output the product name and unit price for every product in the sample data, with each product separated by a new slide.

In situations where you want to output many records returned from a select, you can use a ForEach tag. The ForEach tag will generate output once for each record returned by its select. The ForEach tag itself will not insert data into the template, but rather stores data in a variable that can be used by other tags to generate output.

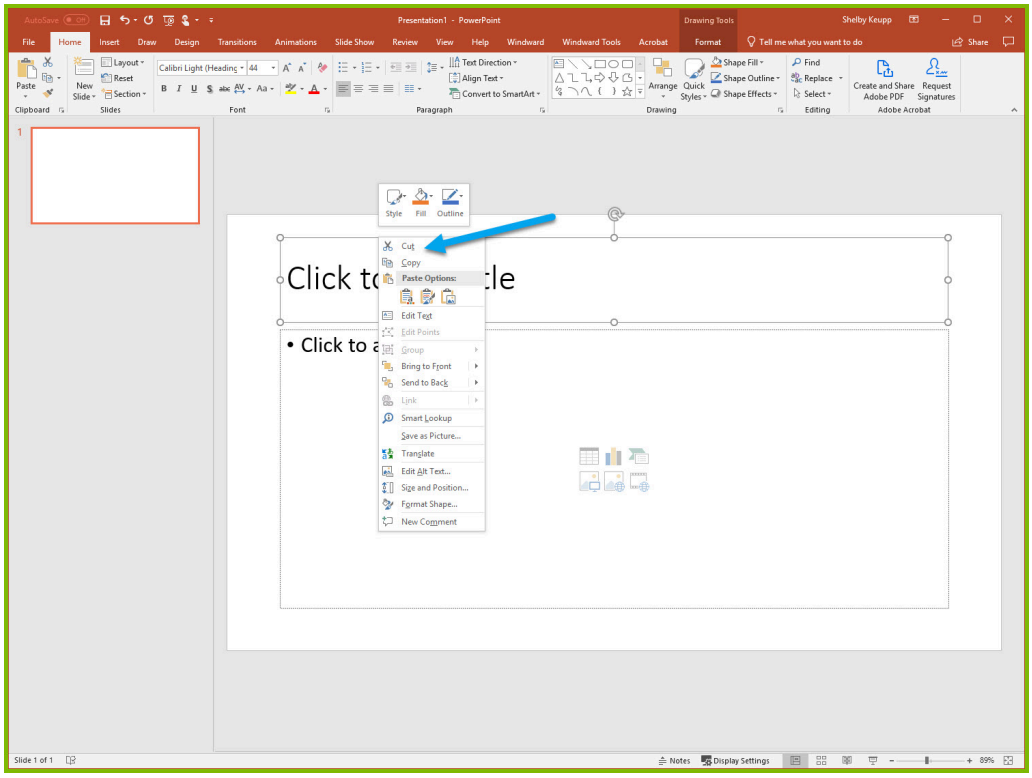
For this example, we will use a new "**Title and Content**" template.

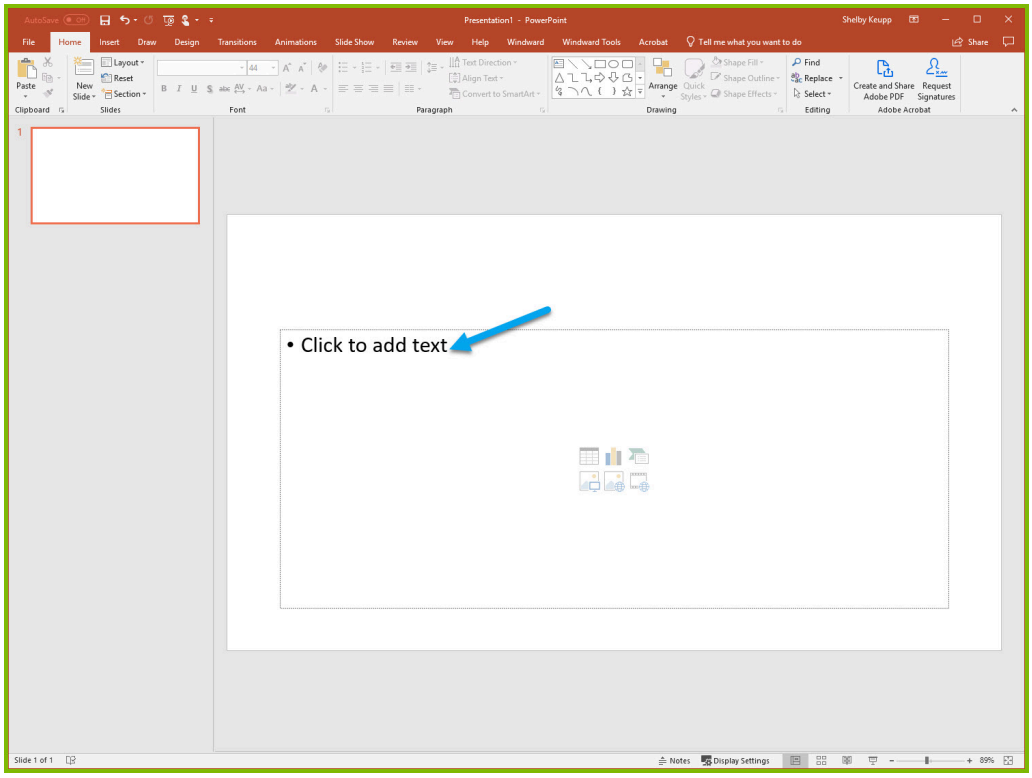
1. Click on the “**New Slide**” button to create a new slide, then delete the original Title slide.



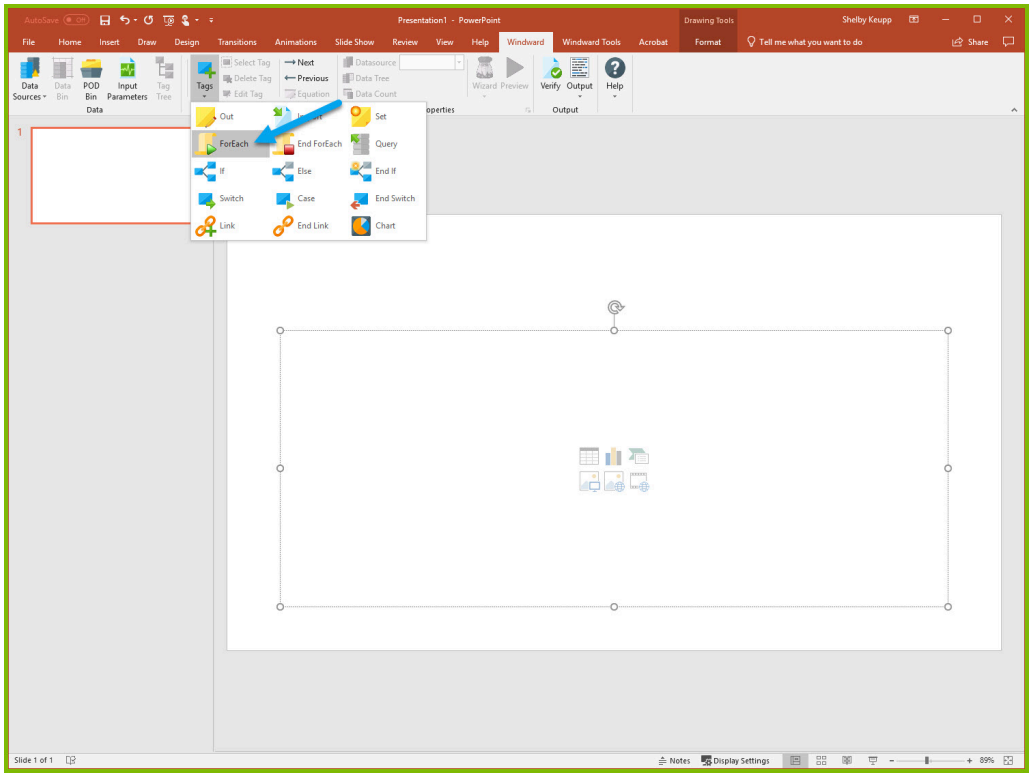


2. Click on the top text box that is labelled "**Click to add title**", then press Delete to remove the extra text box. Now click inside the remaining text box and hit the backspace button to delete the bullet point.

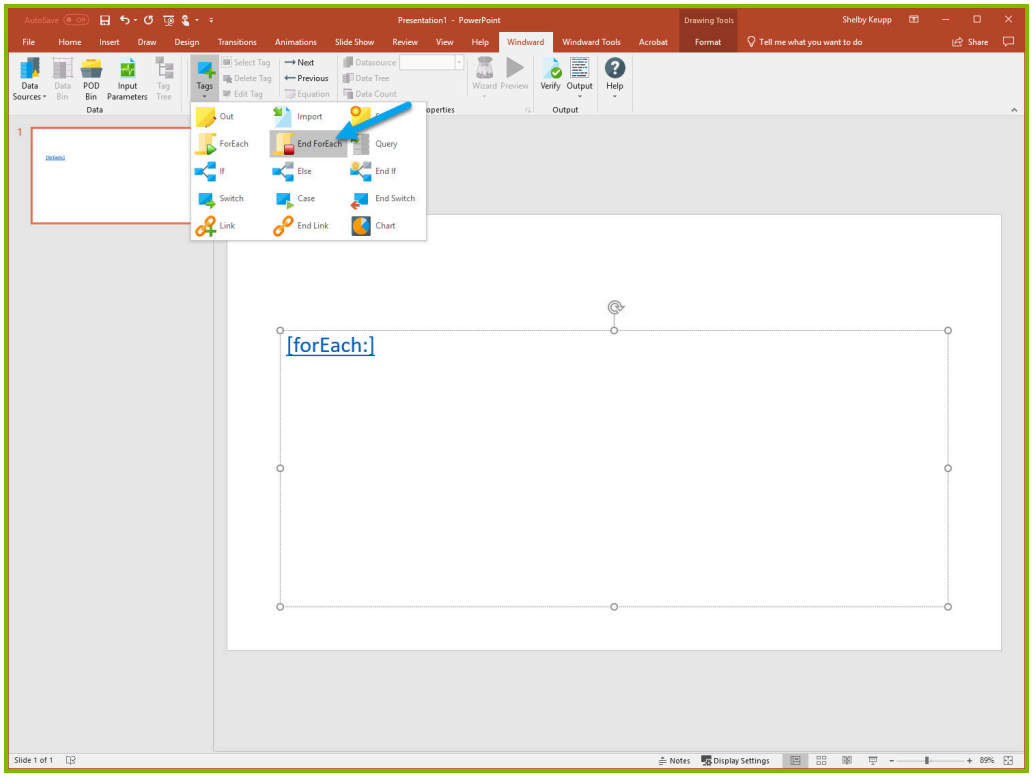




3. To place a ForEach tag, expand the drop down under the button "**Tags**" in the Windward ribbon and click "**ForEach**."

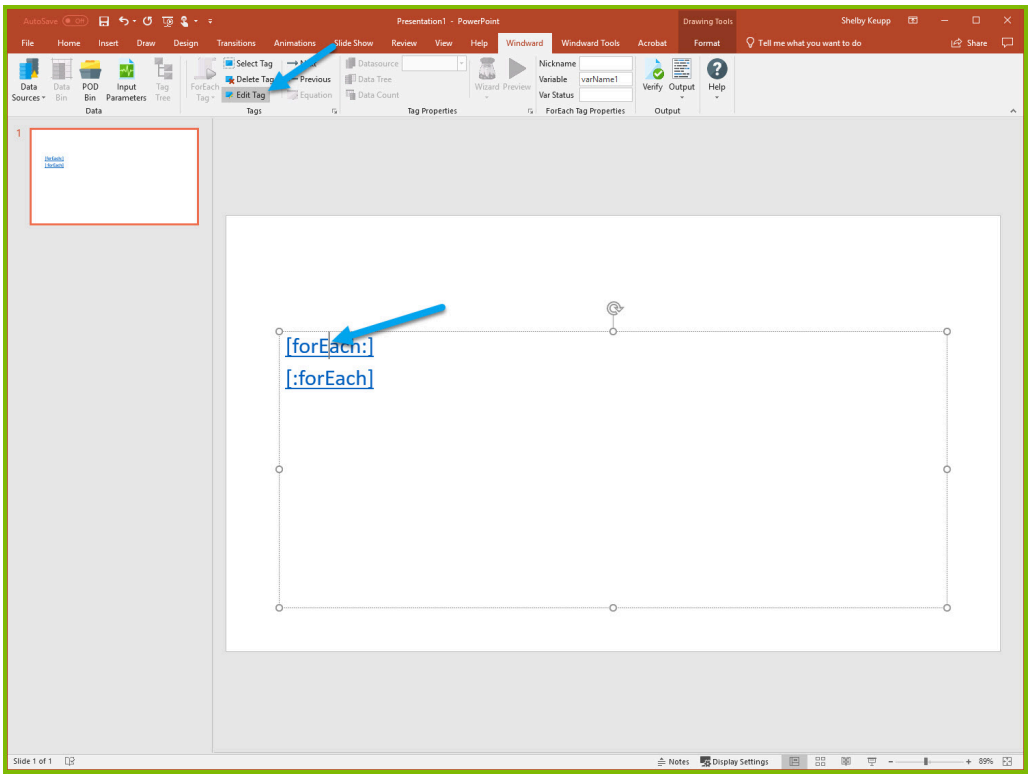


4. Click enter to move to a new line, expand the drop down under the button "**Tags**" in the Windward ribbon, and click "**EndForEach**" to place a closing tag for the ForEach tag.

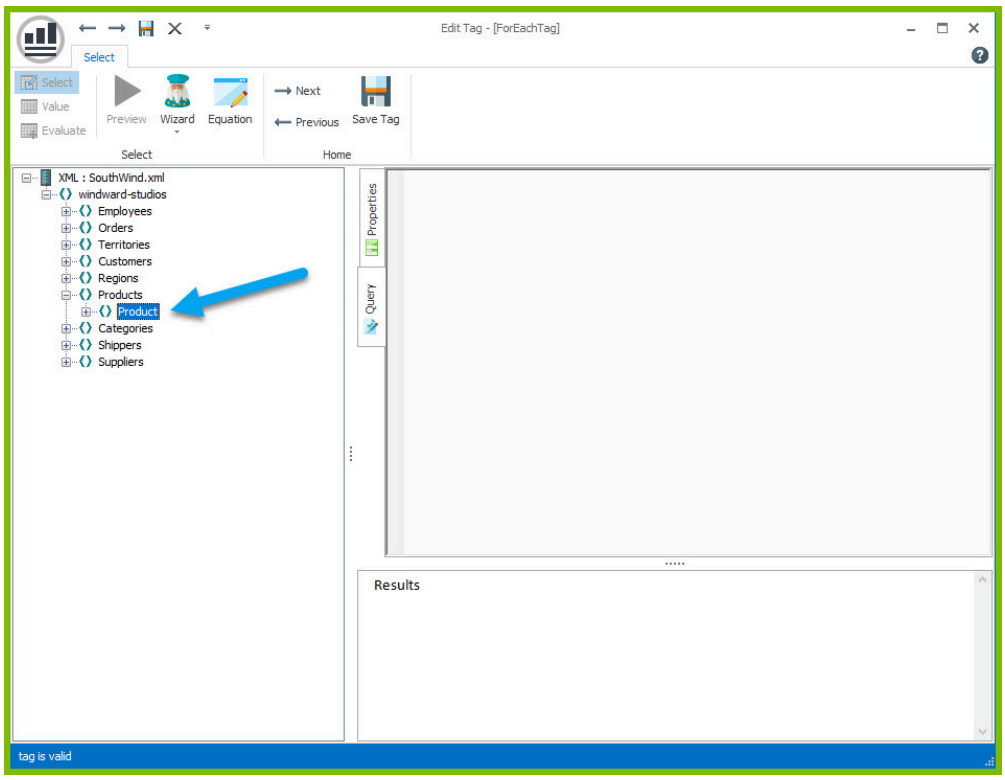


Now all the content that you place between the ForEach and EndForEach tags will be generated once for each record returned by the ForEach tag's select

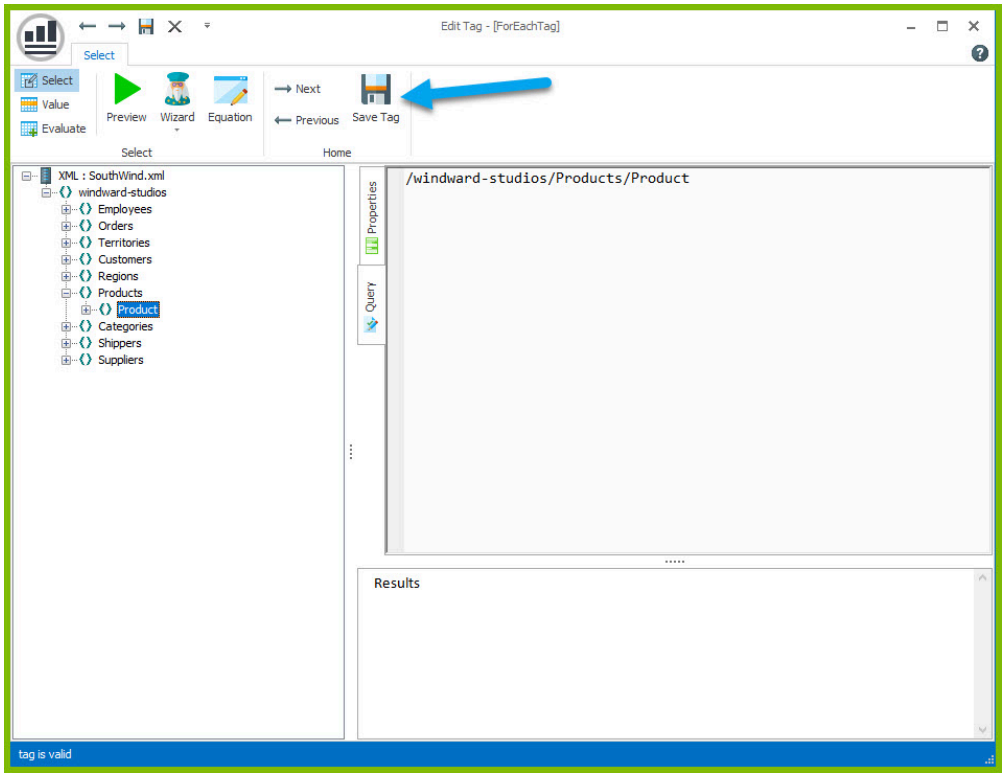
5. For the ForEach tag, you will select the Product table so that you can output information on each product. You can use the Tag Editor to easily create a query for your tag. Place your cursor on the **"[forEach:]"** tag that was inserted in your template and click the **"Edit Tag"** button in the Windward ribbon to open the Tag Editor.



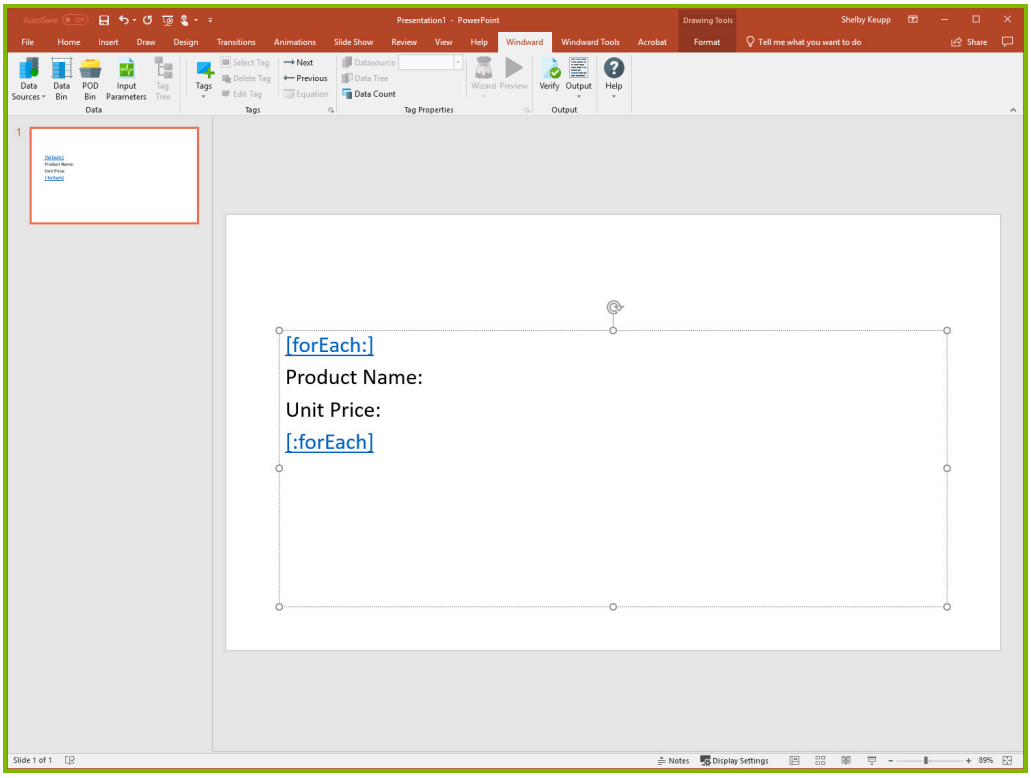
6. In the Tag Tree, expand the node XML: SouthWind.xml -> windward-studios -> Products and double-click the **"Product"** node. This will automatically write a select for the Product node.



7. Click the "**Save Tag**" button. Congratulations! You have just inserted your first tag into your template!



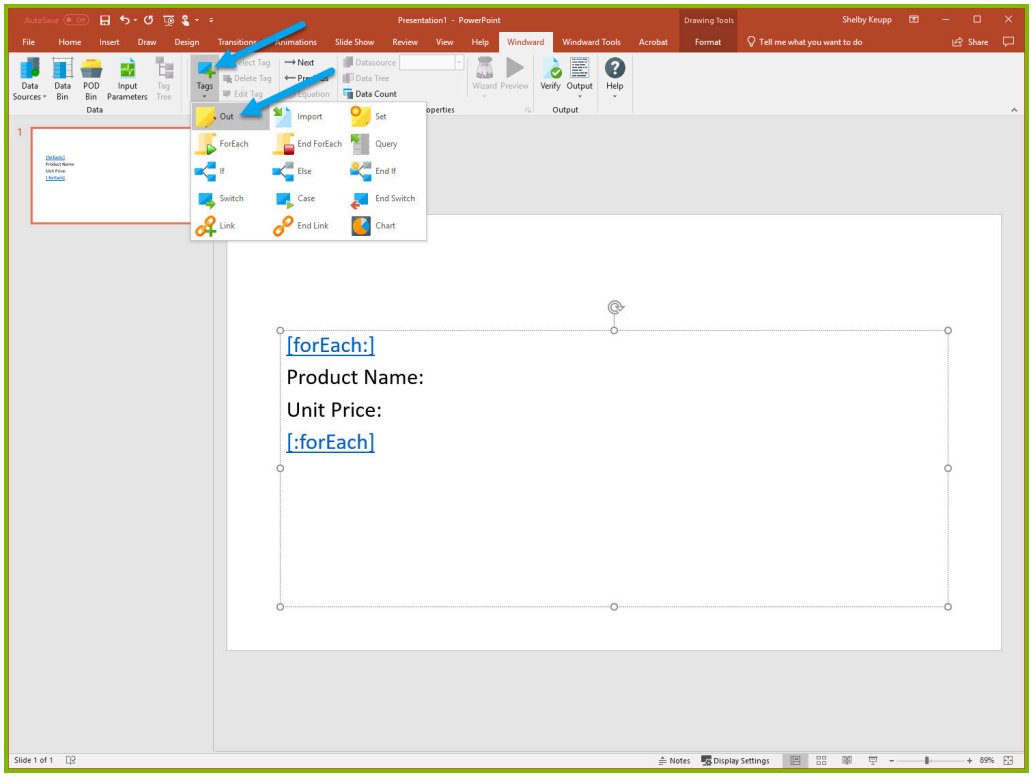
8. On a new line after the ForEach tag, enter the text "Product Name:" and on the next line "Unit Price:".



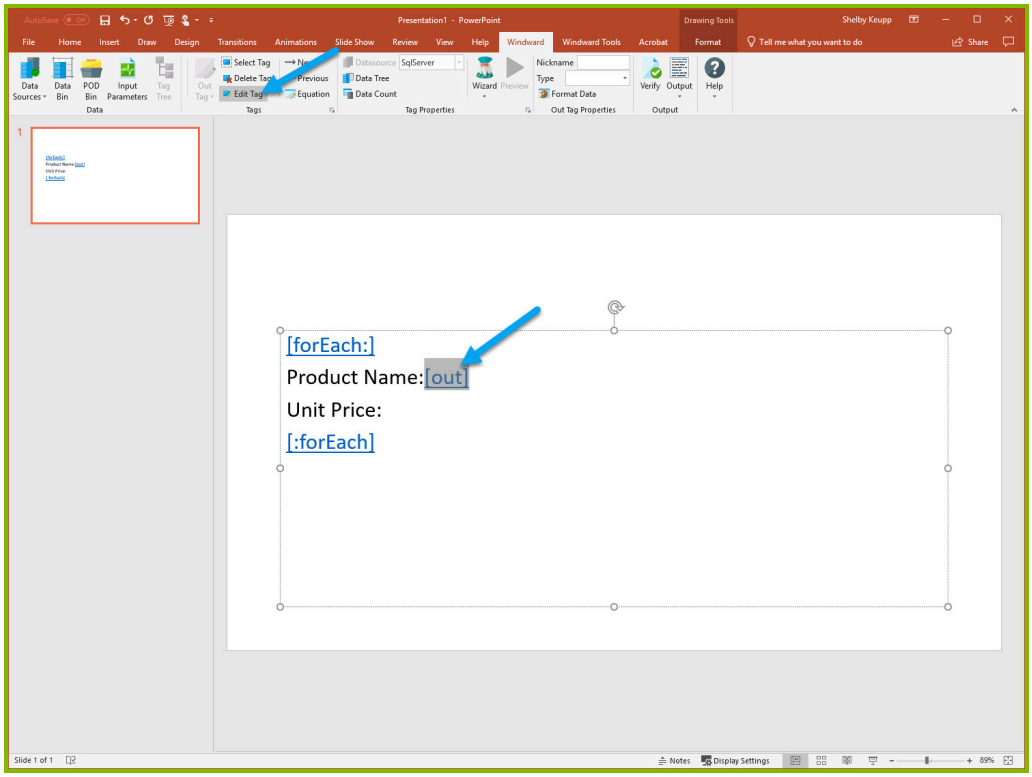
The “Product Name” and “Unit Price” text will be output for every product returned by your ForEach tag’s select.

Out tags will be used to insert data into your final report. These tags will output the Product Name and Unit Price for each product after these labels.

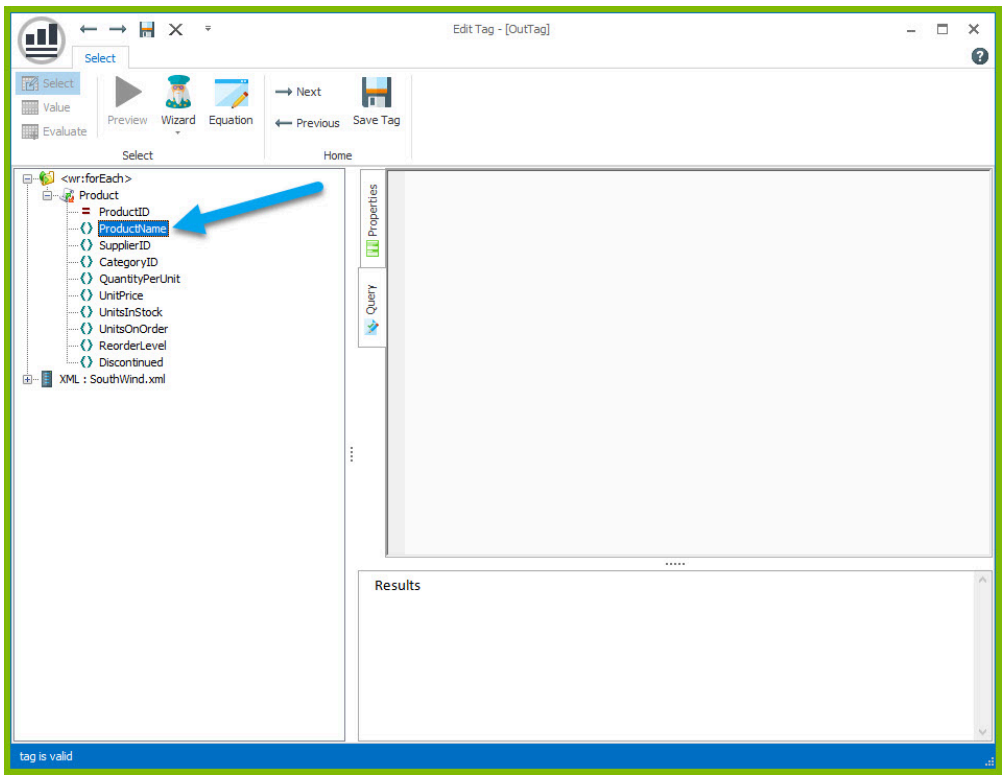
9. Place your cursor after the “Product Name:” text, click “**Tags**” in the Windward ribbon, and click **“Out.”** This places an Out tag at the location of the cursor.



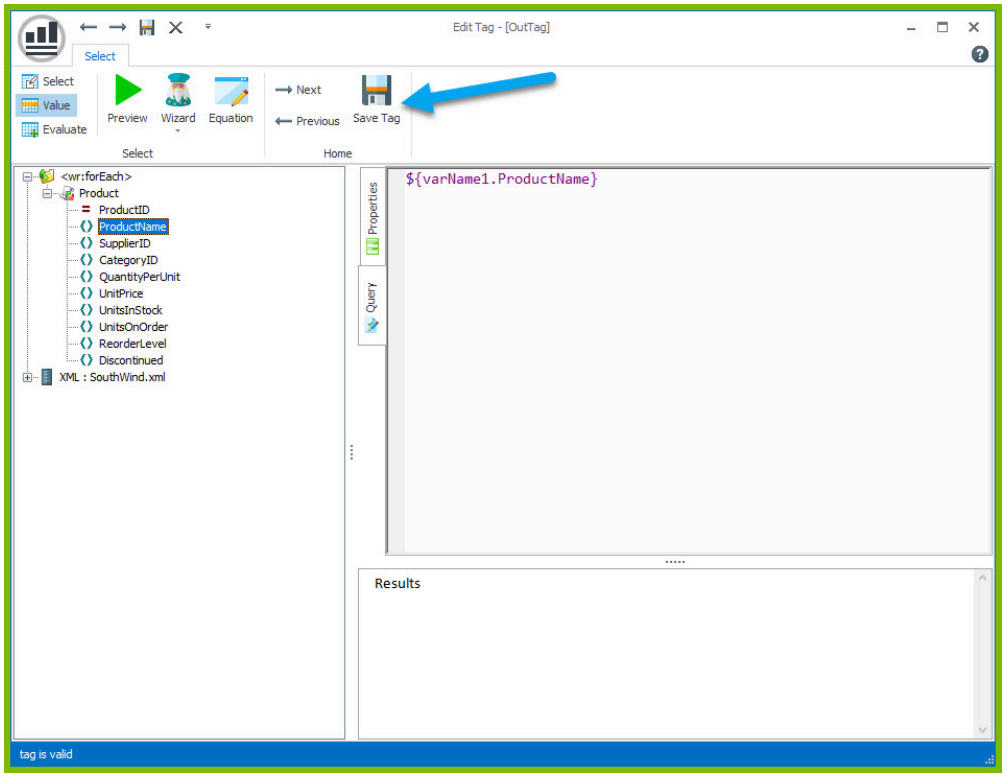
10. Open the tag Editor by placing your cursor on the Out tag and clicking "**Edit Tag**."



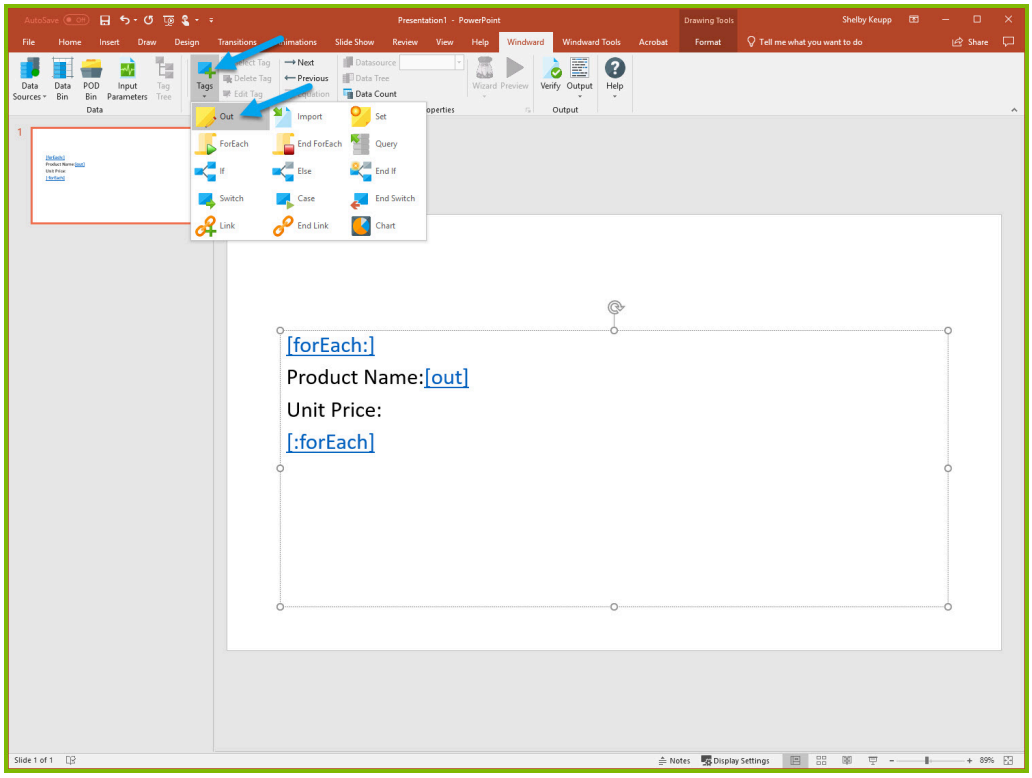
11. You can now see your ForEach variable in the tag editor since the Out tag occurs in the template between the ForEach tag and the EndForEach tag. In the Tag Tree, expand <wr:forEach> -> Product and double-click **"ProductName."** This automatically queries the ProductName currently held by the ForEach variable.



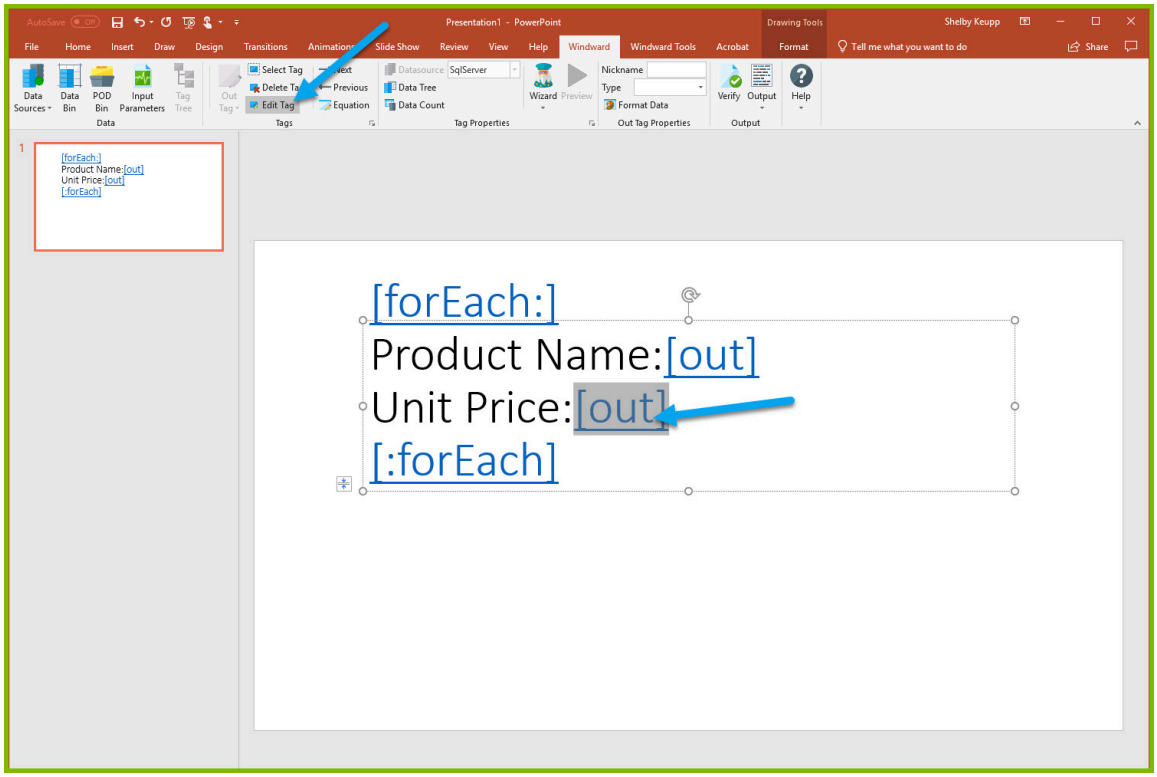
12. Click "**Save Tag**" button to save your tag's query.



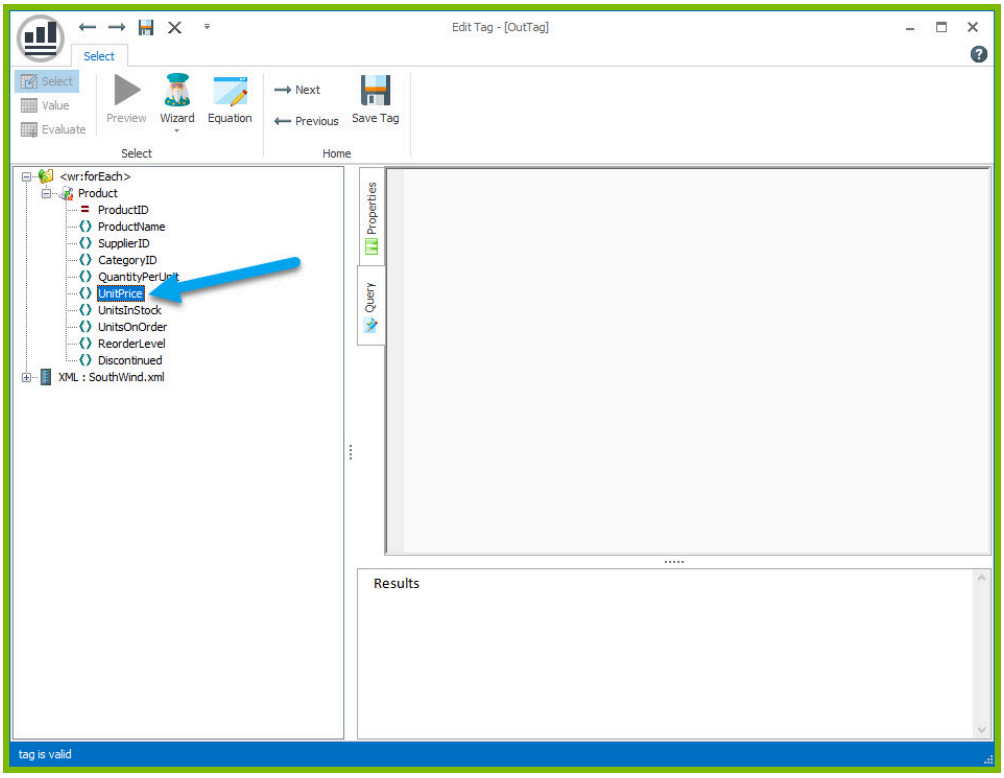
13. Place your cursor after the "Unit Price:" text and click "Tags" in the Windward ribbon and click "**Out**." This places an out tag at the location of the cursor.



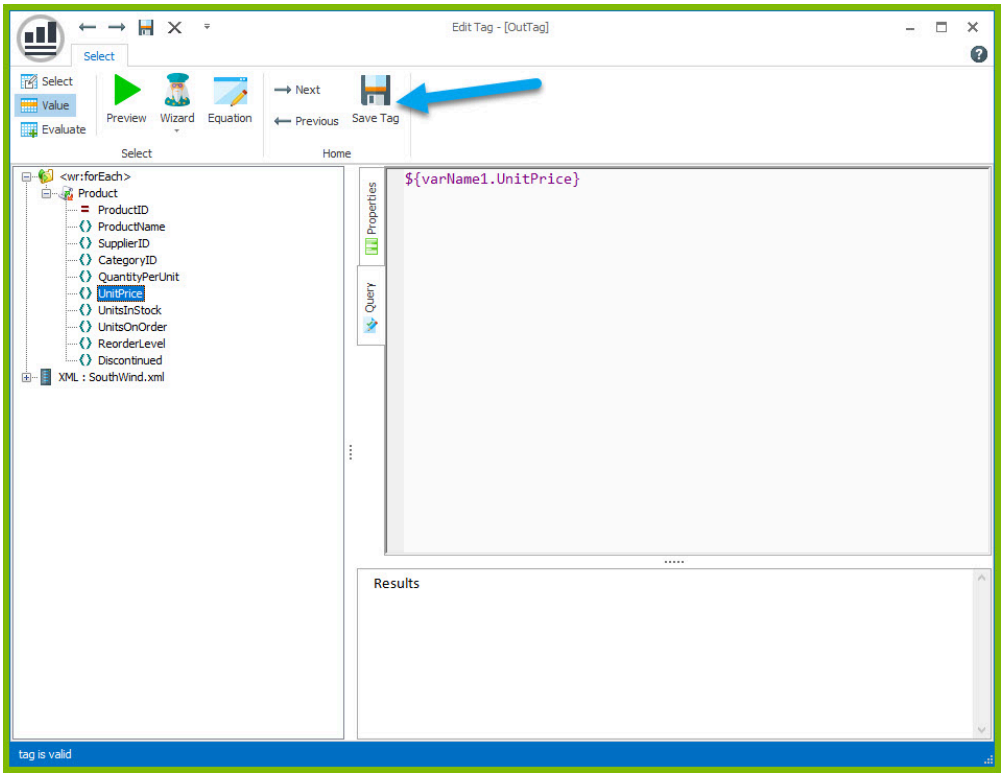
14. Open the tag Editor by placing your cursor on the Out tag and clicking "**Edit Tag**."



15. You can now see your ForEach variable in the tag editor since the Out tag occurs in the template between the ForEach tag and the EndForEach tag. Expand <wr:forEach> -> varName1 and double click UnitPrice. This automatically queries the UnitPrice currently held by the ForEach tag.

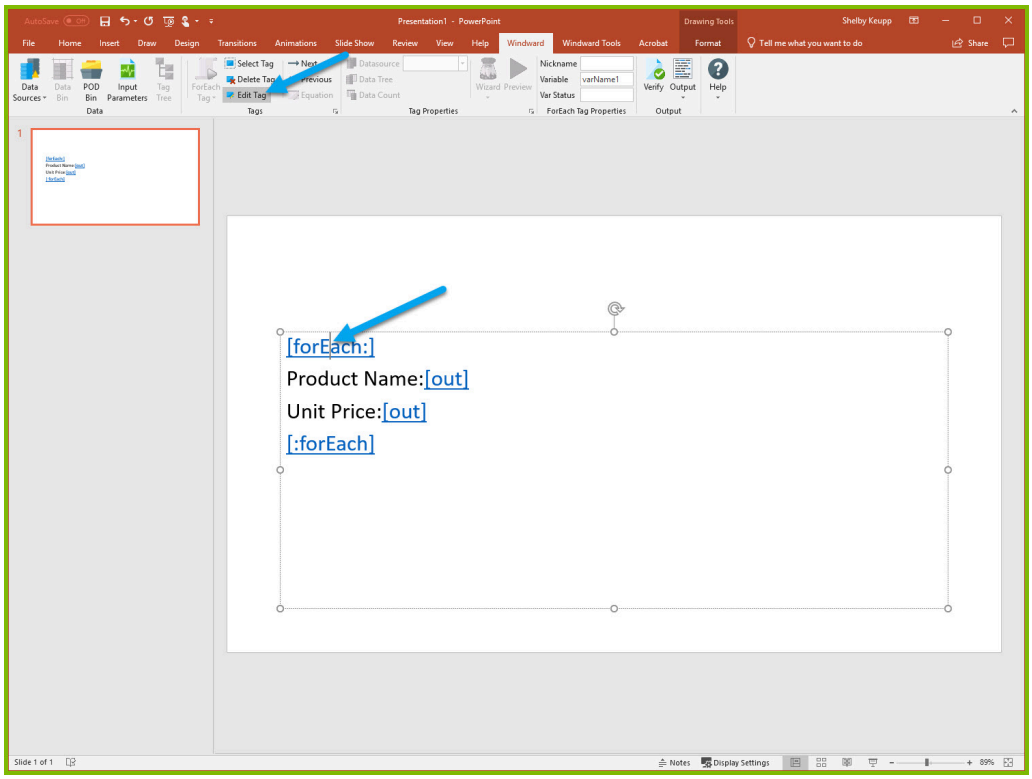


16. Click the **"Save Tag"** button to save your tag's query.

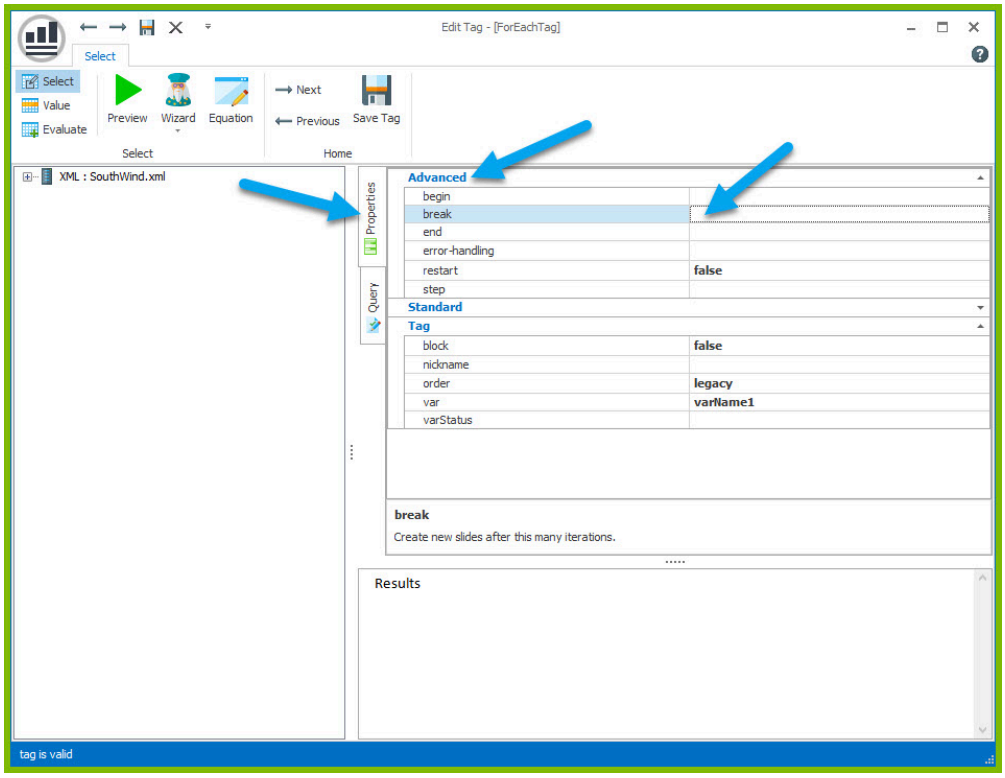


Finally, you are going to add some indicator between each product, so you can easily distinguish between them in your output. Each output will be on its own slide.

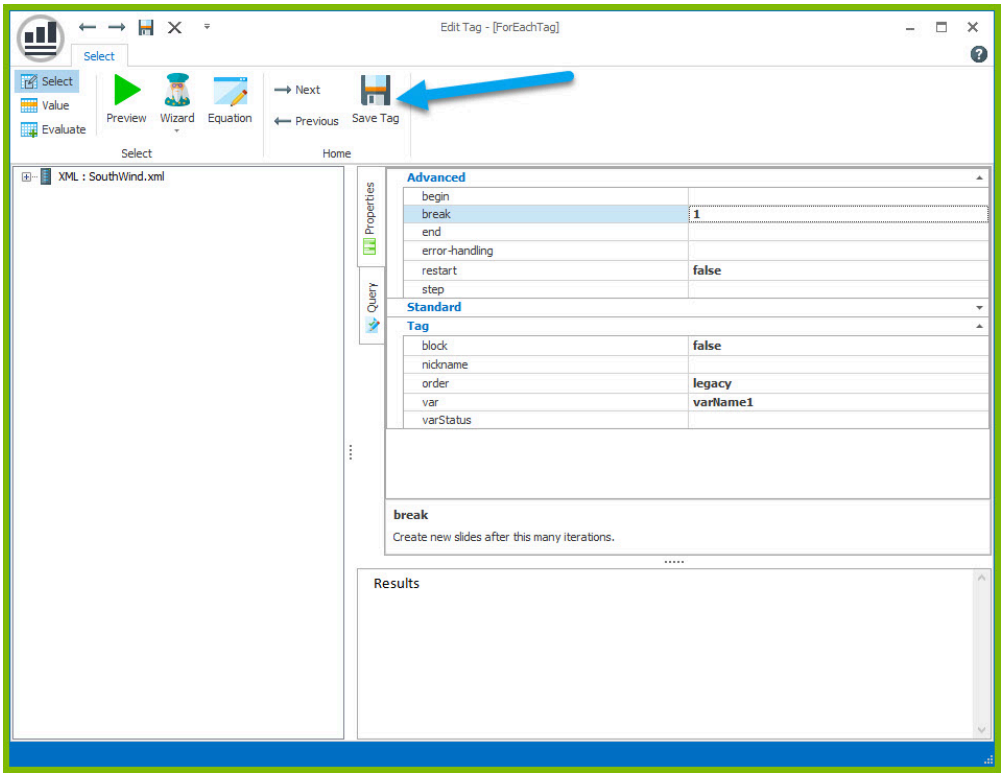
17. Place your cursor on the **“[forEach:]”** tag that was inserted in your template and click the **“Edit Tag”** button in the Windward ribbon to open the Tag Editor.



18. To separate each output by a new slide, select the Properties pane in the Tag Editor. Open the drop down menu for the “**Advanced**” tab and set the break value to 1.



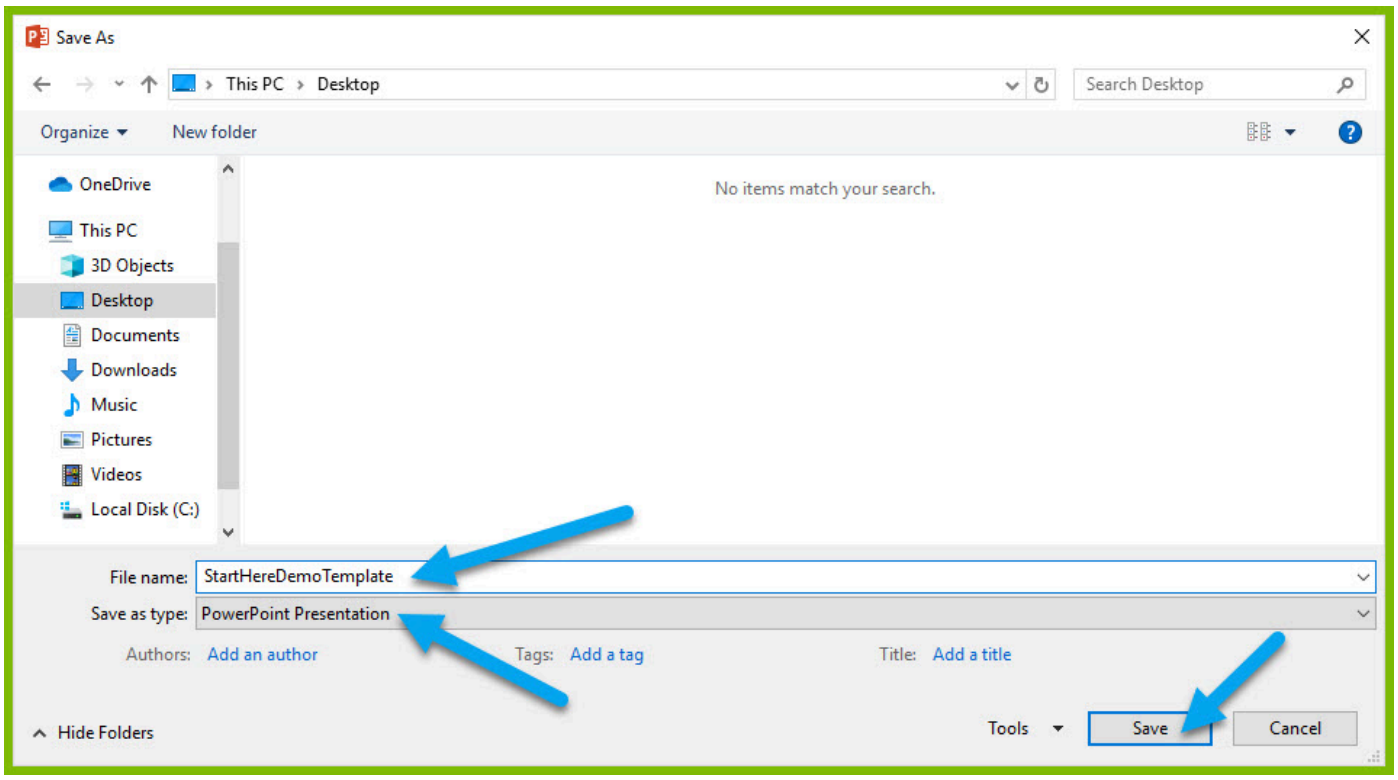
19. Click “**Save Tag**” button to save your tag's query.



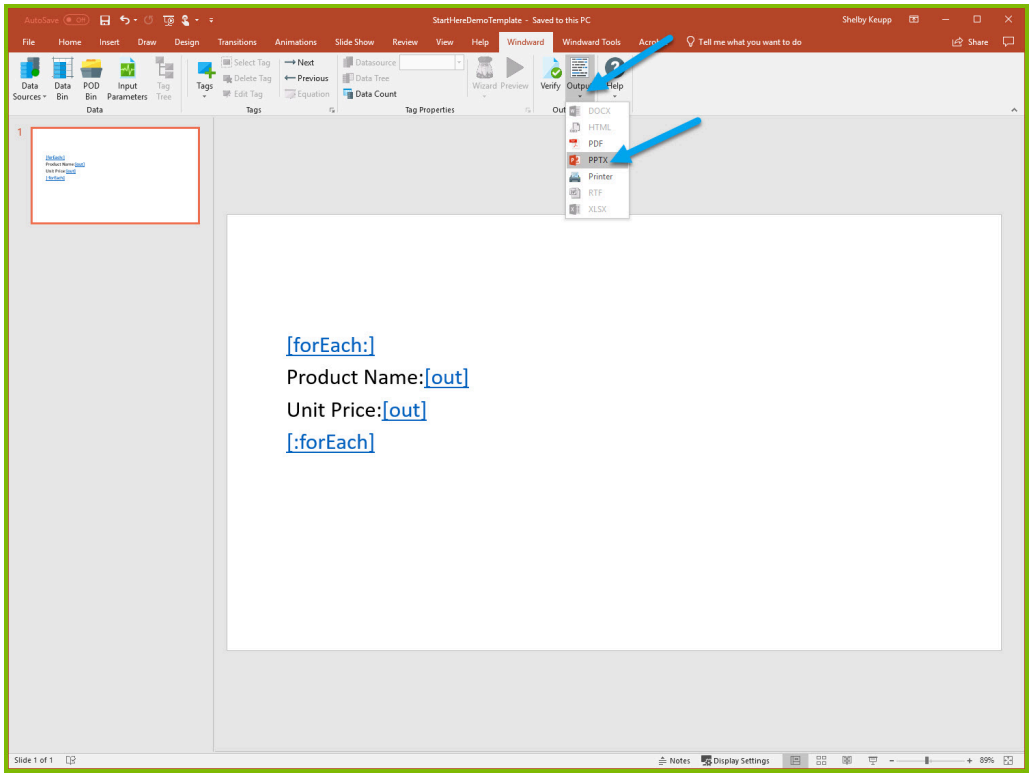
Now you are all finished with your template design!

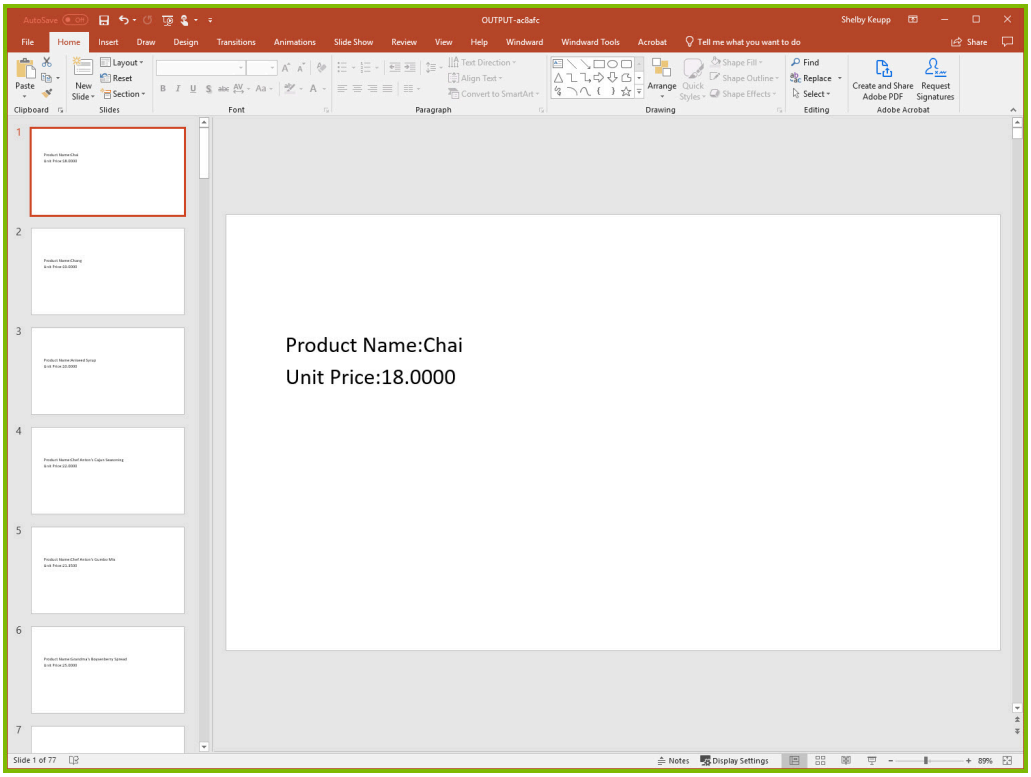
Step 4 - Output

1. Save your template. You can save your template to anywhere you want on your machine and give it any name you want. Be sure to save it as a ".pptx" document.



2. In the “Windward” tab, click the “**Output**” button and from the drop down select “PPTX.”





Your template will output, and you should see a list of product names and their unit price with each product separated by a new slide.

Congratulations! You have created your first template in Windward Designer and produced your first output!

Next Steps

Now that you have finished this introduction tutorial, here are some resources we recommend you visit next:

1. How to connect to XML datasources
2. How to use the XPath Wizard
3. The Windward Tutor: A collection of short video tutorials
4. Creating an Invoice in Windward Designer

Creating a Template in Word with JSON Data

Training Guide

Welcome to Windward Designer

Windward Studios takes a unique approach to reporting. Our Report Designer sits directly inside Microsoft Office which means you get to use a **familiar and powerful tool** without having to learn a new designer. If you've ever used one of our competitors' products, you may be familiar with their modular designers that require you to build reports using bits and pieces, where every bit of text or every piece of data is a distinct object in your template. Windward changes all of that. With Windward in Microsoft Office, you **design report templates just like you design any other document**, utilizing Tags to insert your data wherever you need it seamlessly in-line with your other text and content.

Training Overview

This Training Guide walks you through the fundamental steps you need to begin designing templates with Windward Designer in Microsoft Word using a JSON Datasource.

The Four Steps to Windward:

1. Install
2. Connect to data
3. Design your template & insert your data
4. Output

Step 1 - Install

To get started, you need to install the Designer. If you have it already installed, please skip this step!

If you already have a license key, please visit the downloads page to install the software.

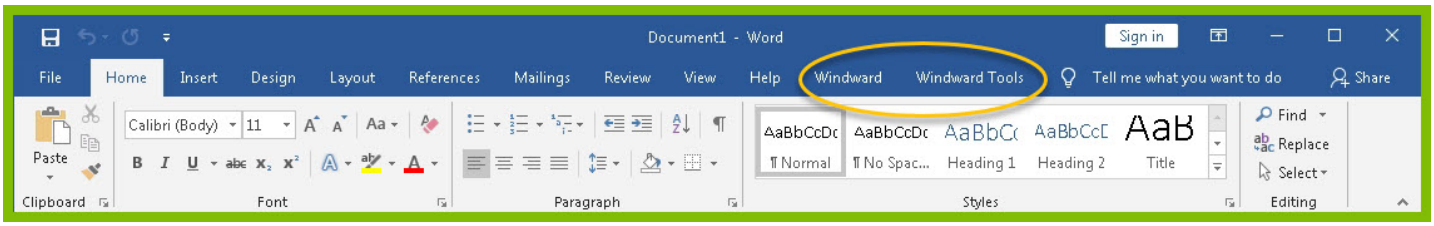
Or start a free 14-day trial!

Step 2 - Connect To Data

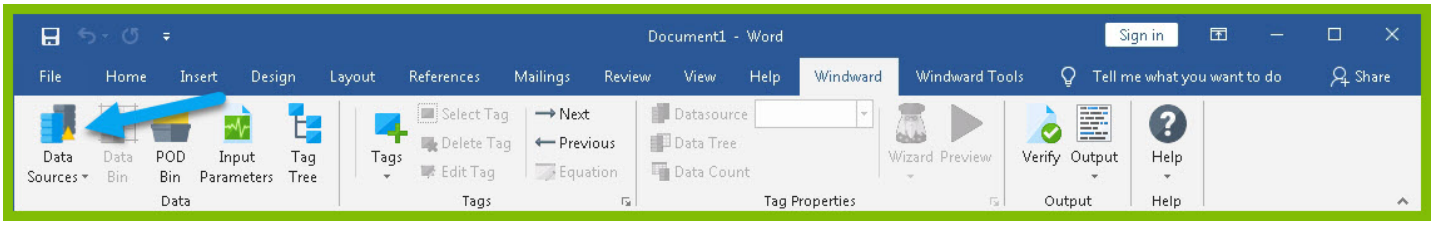
In this training guide, you are connecting to a sample JSON Datasource provided by Windward.

To connect to the sample data:

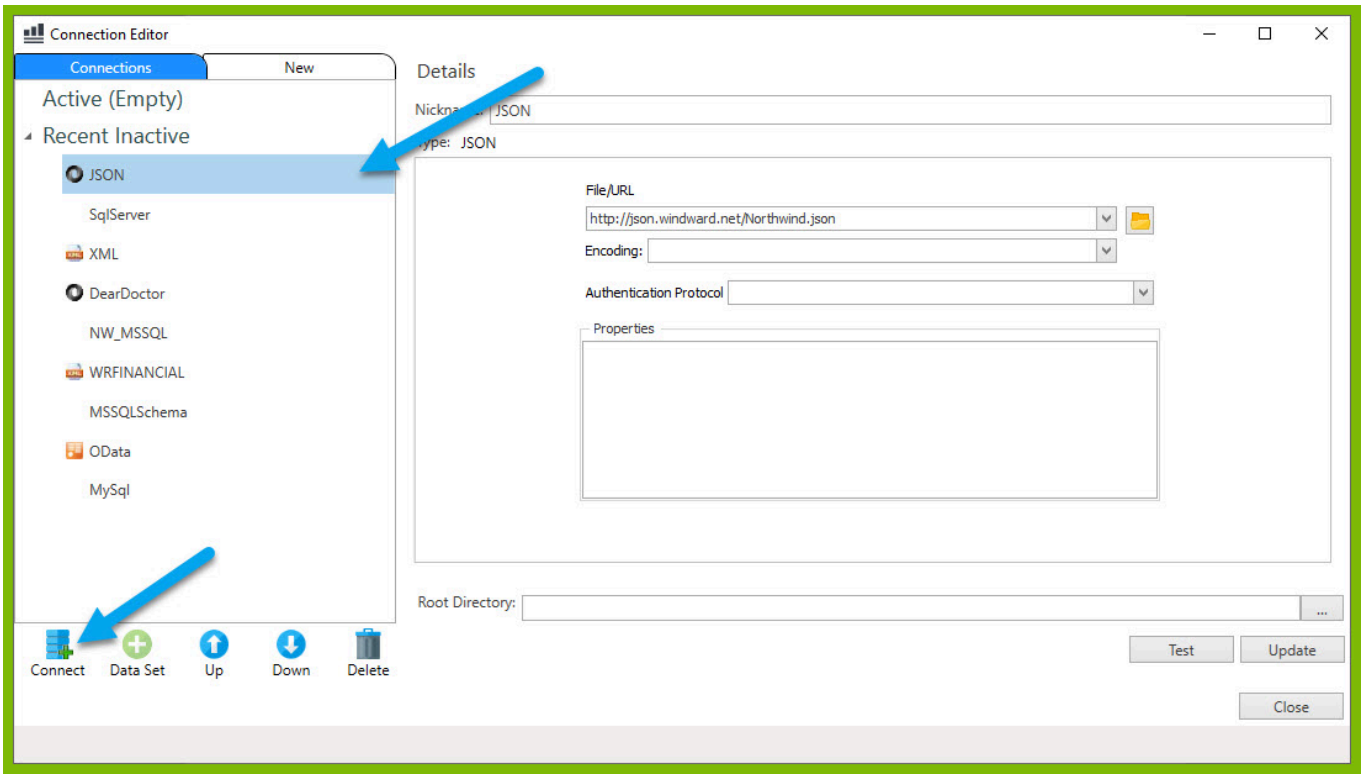
1. Open Microsoft Word. Now that you've installed Windward Designer, you will see two new tabs in the Microsoft Office Ribbon – the "**Windward**" Tab and the "**Windward Tools**" Tab.



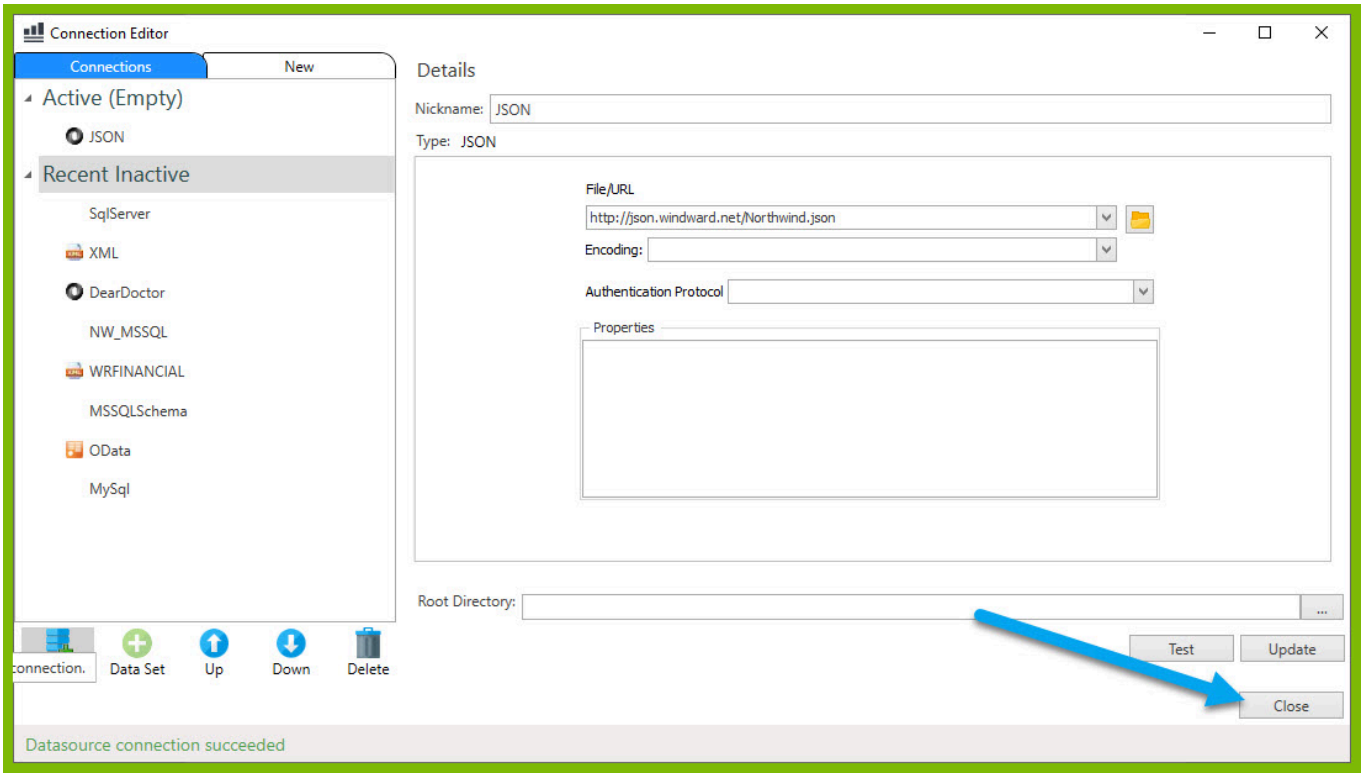
2. Click on the **"Windward Tab"** and click on the **"Data Sources"** button located on the left-hand side of the ribbon. This opens the Connection Editor where you will manage all of your data connections. (Alternatively, you can click on the lower half of the button to expand the drop down and then click **"Data Sources."**)



3. In the Connection Editor window, select the data connection labeled "**JSON**" under "Recent Inactive" and click the "**Connect**" button.



4. Close the Connection Editor by clicking **"Close."** You have now successfully connected to the sample data!

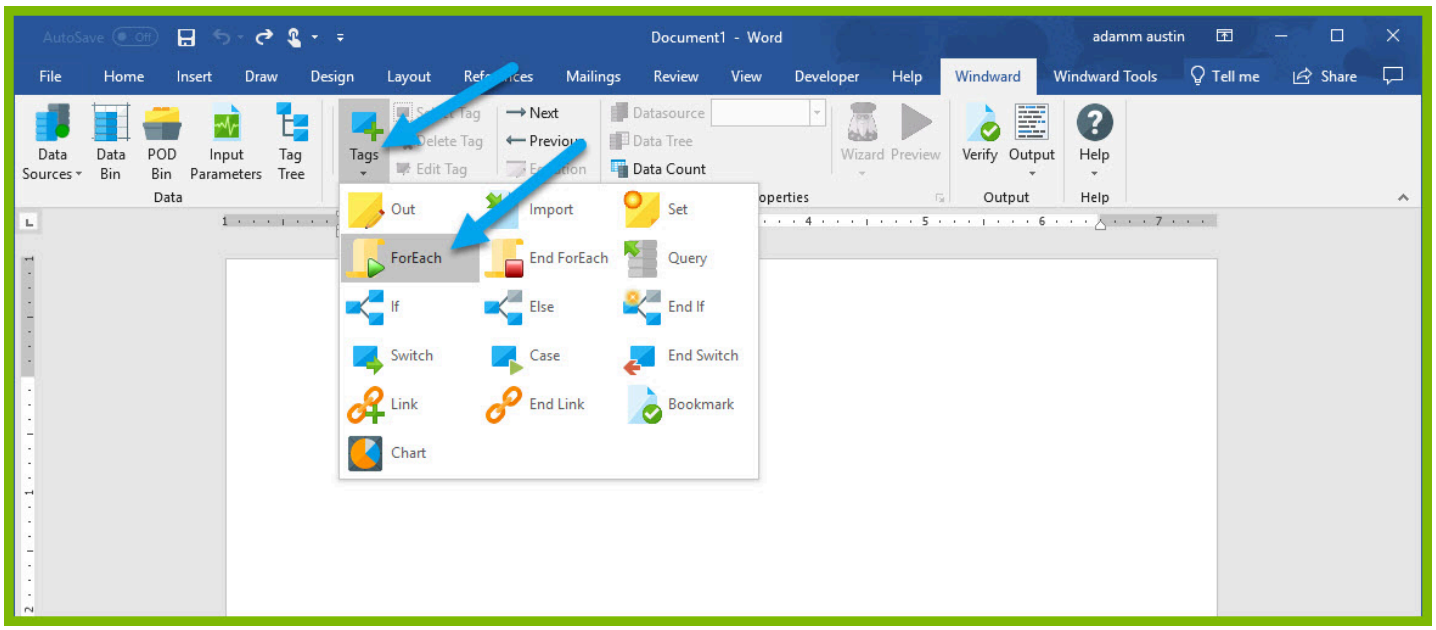


Step 3 - Design Your Template & Insert Your Data

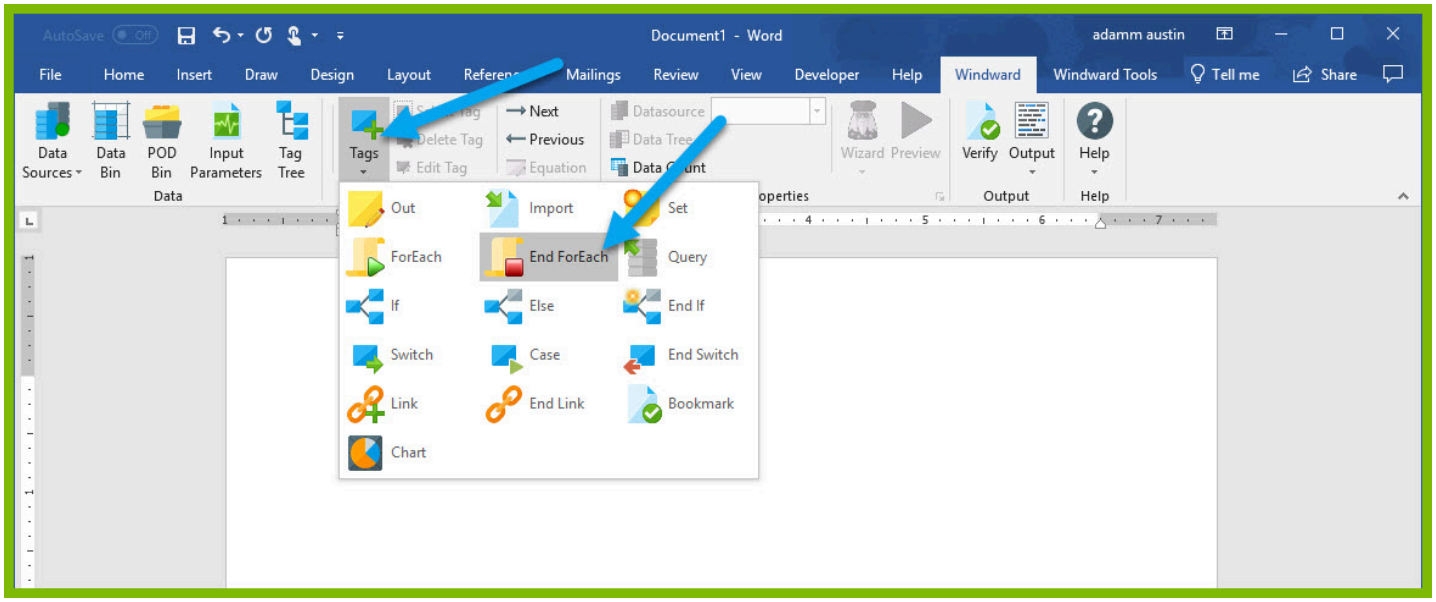
In this training guide, you will build a very basic template to get the feel of Windward Designer. While your final product may not seem very impressive, you will learn the basic skills to making any template! You will make a template which will output the product name and unit price for every product in the sample data, with each product separated by a line.

In situations where you want to output many records returned from a select, you can use a ForEach tag. The ForEach tag will generate output once for each record returned by its select. The ForEach tag itself will not insert data into the template, but rather stores data in a variable that can be used by other tags to generate output.

1. To place a ForEach tag, expand the drop down under the button "**Tags**" in the Windward ribbon and click "**ForEach**."

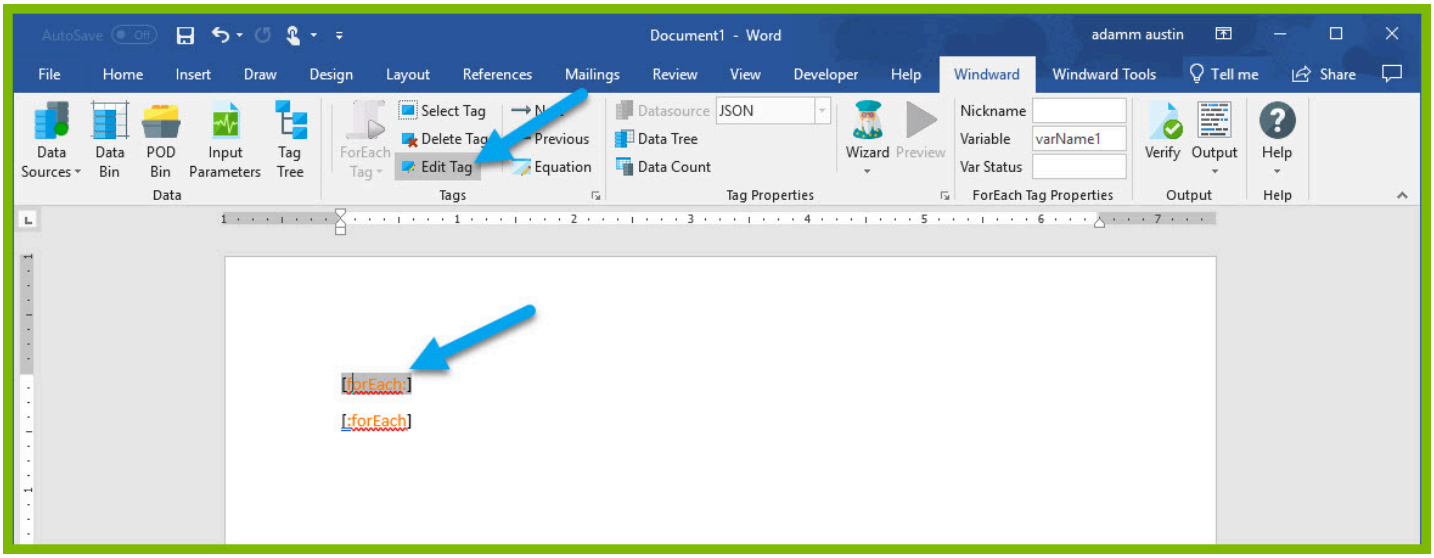


2. Click enter to move to a new line, expand the drop down under the button "**Tags**" in the Windward ribbon, and click "**EndForEach**" to place a closing tag for the ForEach tag.

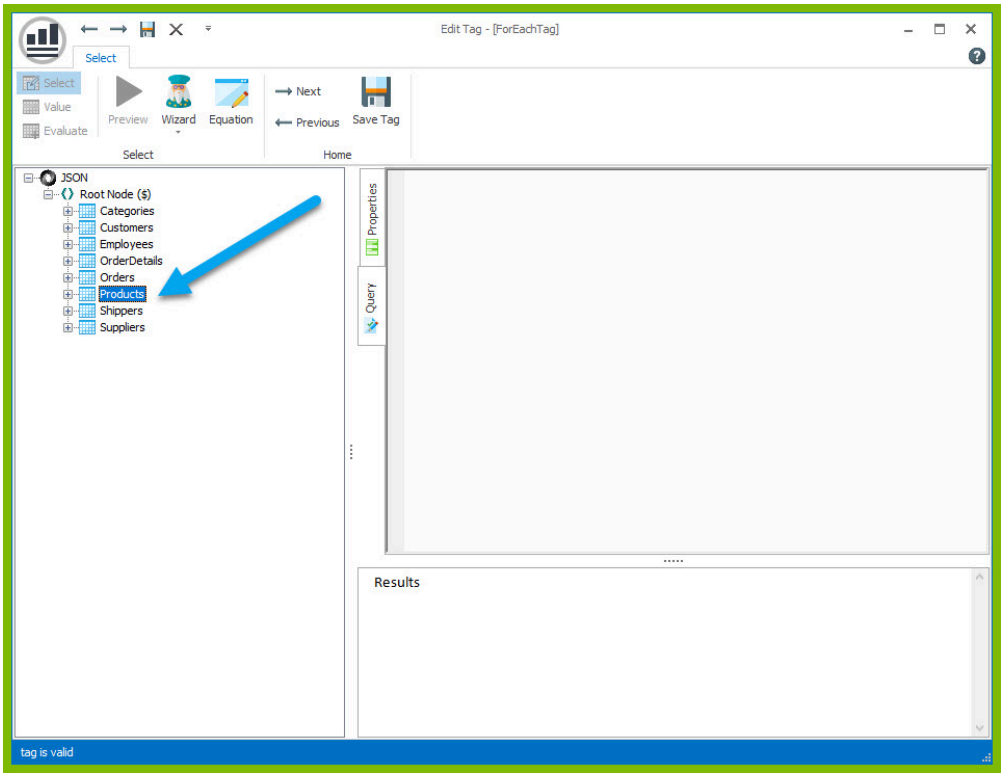


Now all of the content that you place between the ForEach and EndForEach tags will be generated once for each record returned by the ForEach tag's select.

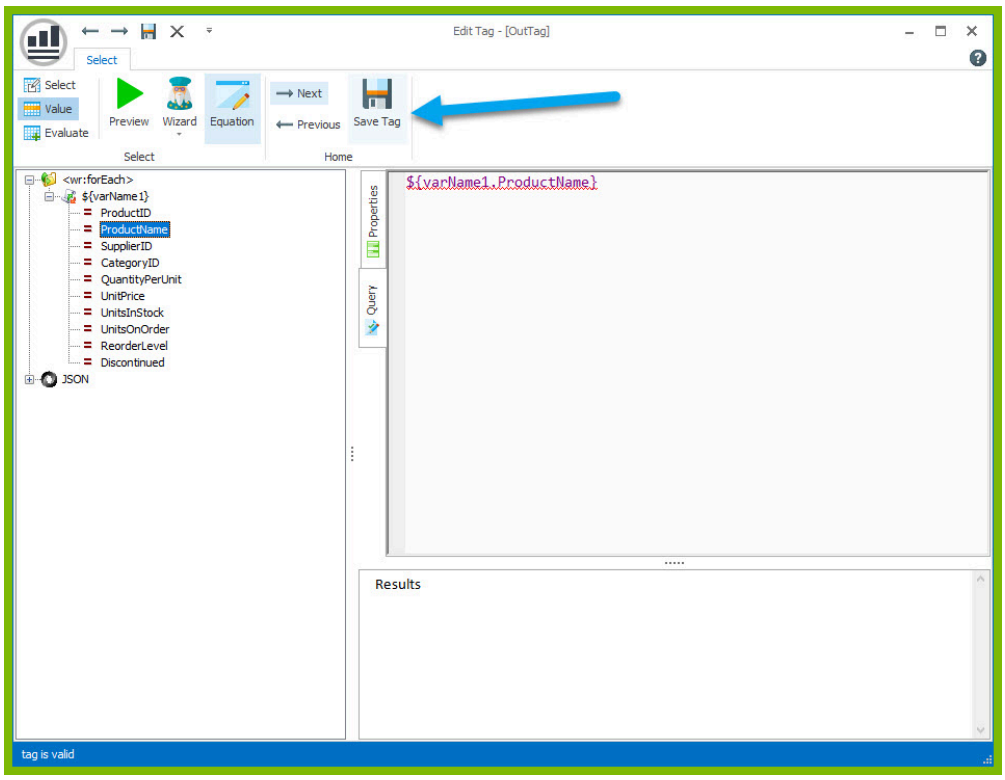
3. For the ForEach tag, you will select the Product table so that you can output information on each product. You can use the Tag Editor to easily create a query for your tag. Place your cursor on the **"[forEach:]"** tag that was inserted in your template and click the **"Edit Tag"** button in the Windward ribbon to open the Tag Editor.



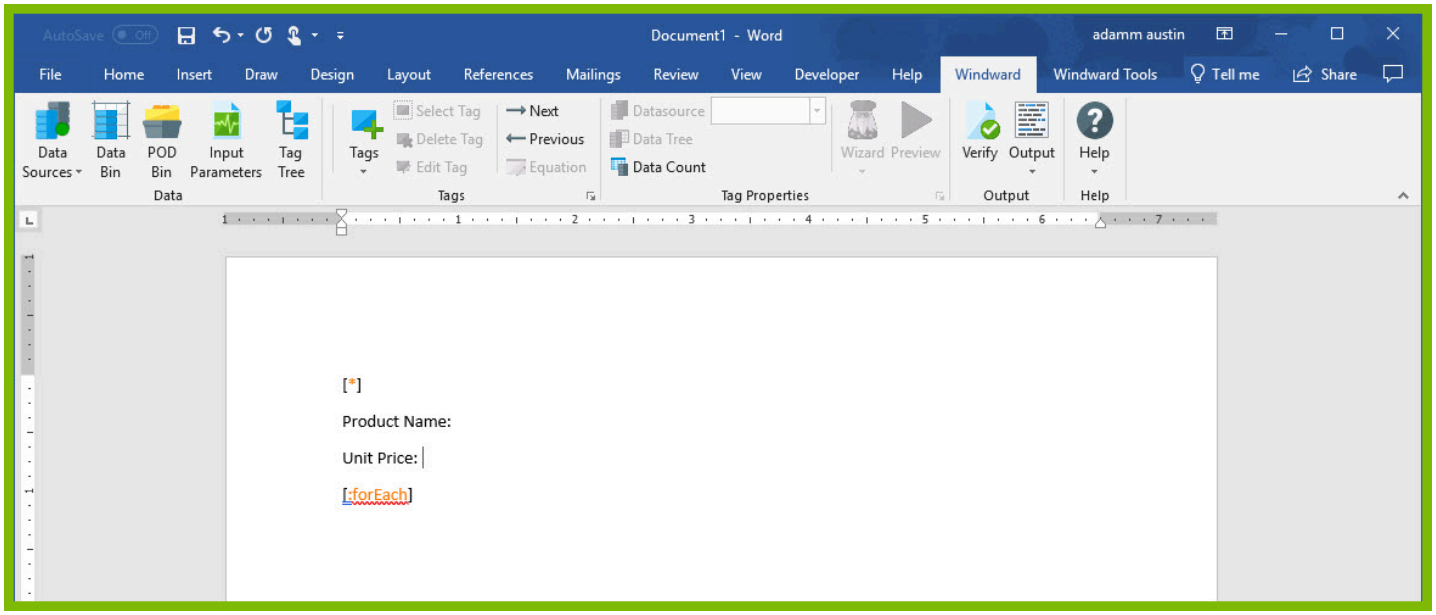
4. In the Tag Tree, expand the node JSON -> Root Node ($) and double-click the **“Products”** node. This will automatically write a select for the Products node.



5. Click the “**Save Tag**” button. Congratulations! You have just inserted your first tag into your template!



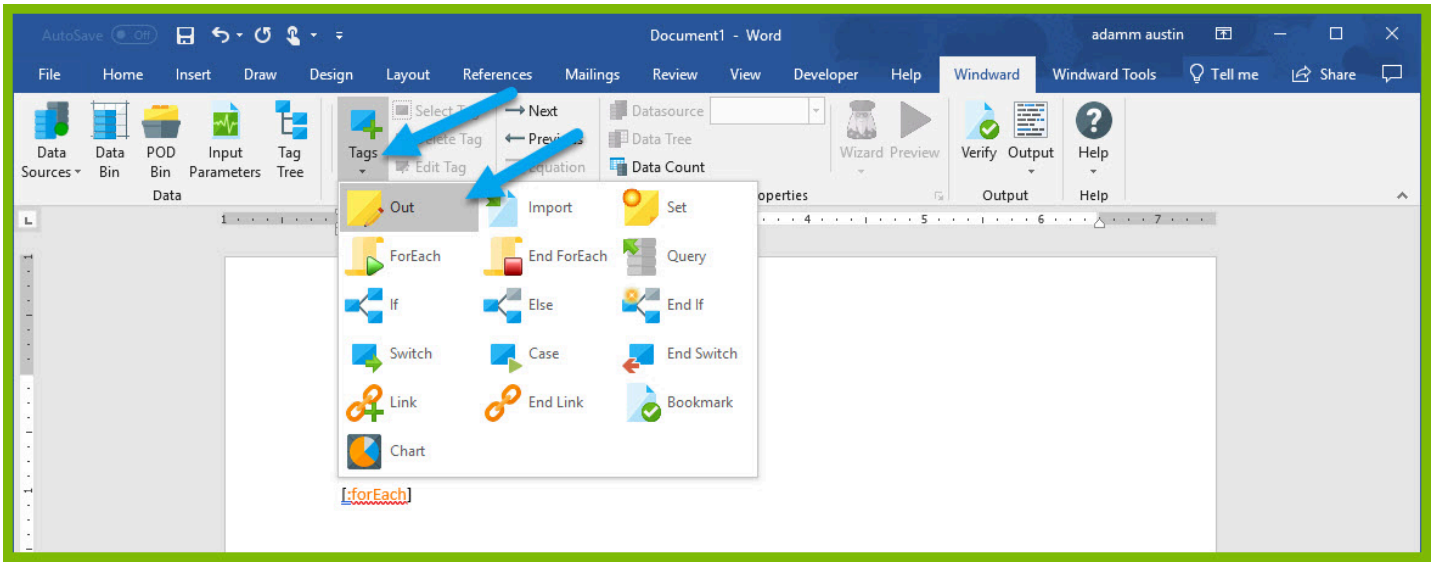
6. On a new line after the ForEach tag, enter the text “Product Name:” and on the next line “Unit Price:”



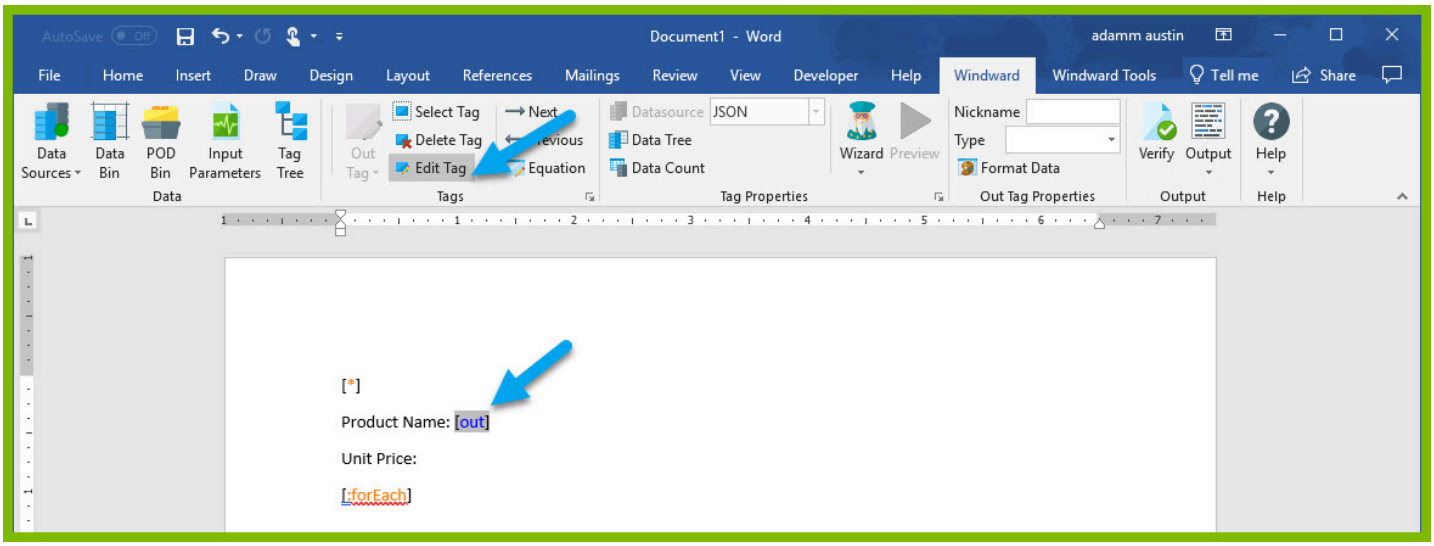
The “Product Name” and “Unit Price” text will be output for every product returned by your ForEach tag’s select.

Out tags will be used to insert data into your final report. These tags will output the Product Name and Unit Price for each product after these labels.

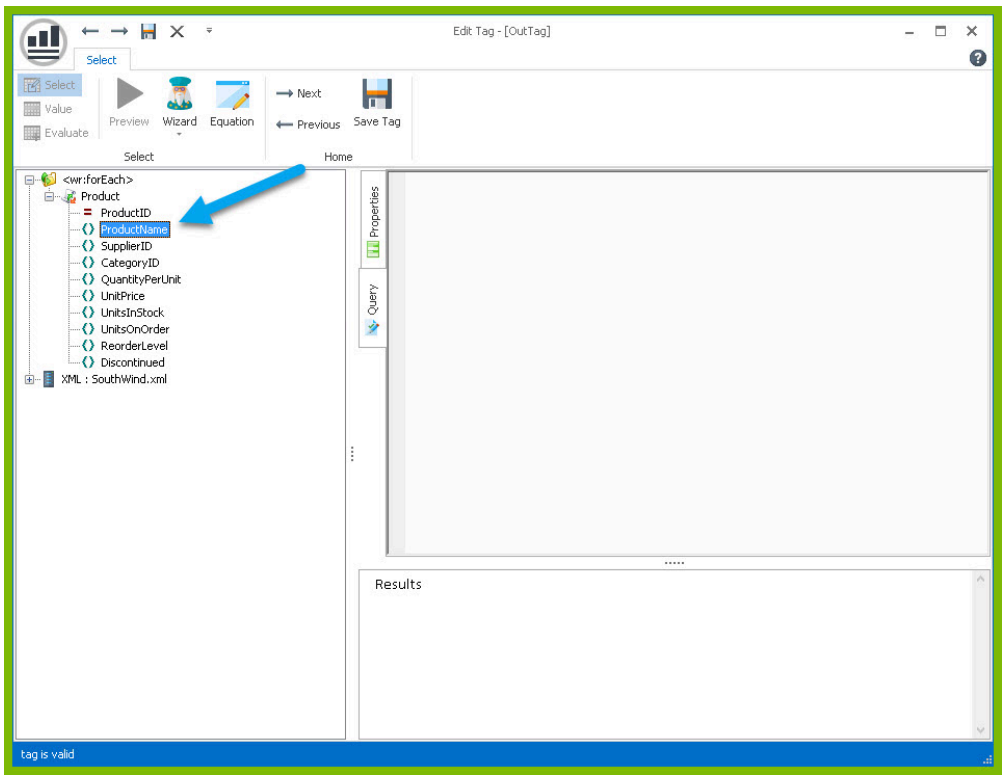
7. Place your cursor after the “Product Name:” text, and click “**Tags**” in the Windward ribbon and click “**Out**.” This places an Out tag at the location of the cursor.



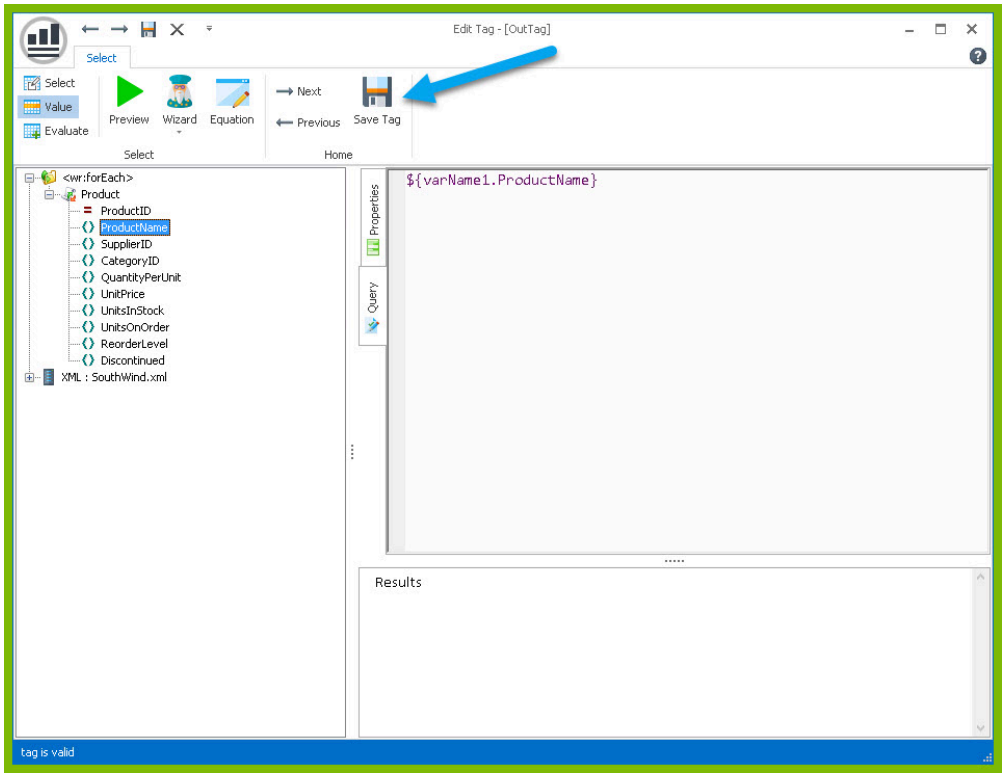
8. Open the tag Editor by placing your cursor on the Out tag and clicking "**Edit Tag**."



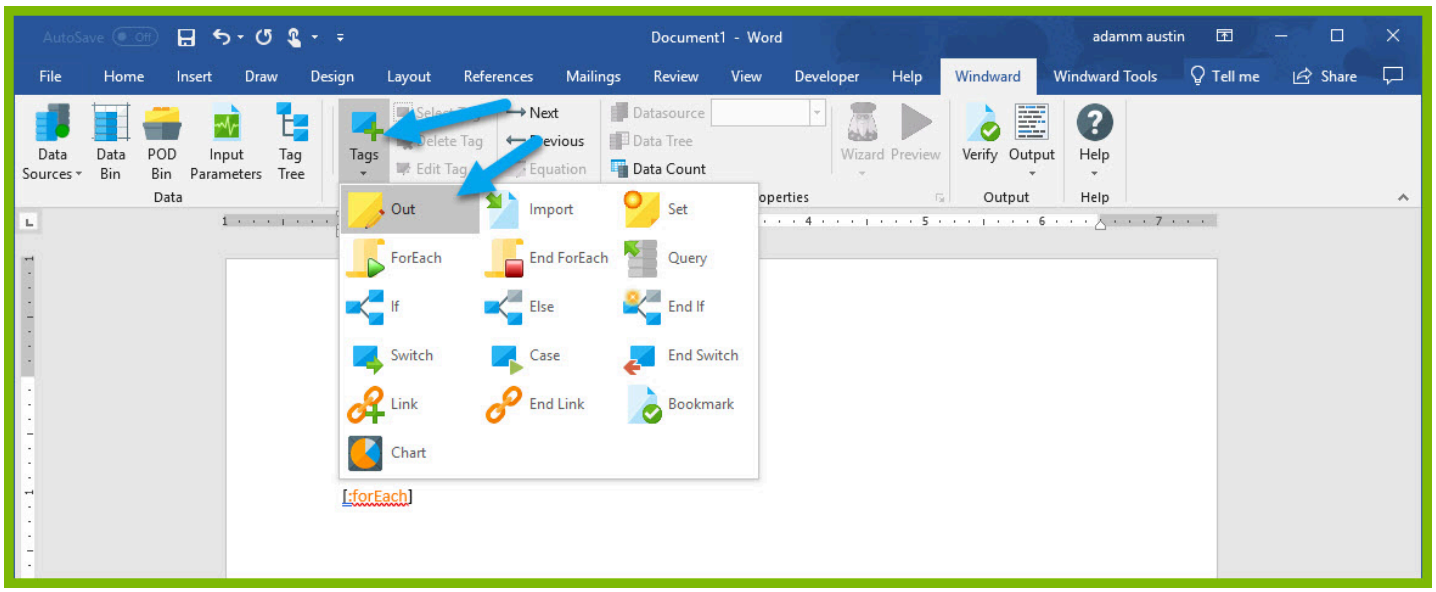
9. You can now see your ForEach variable in the tag editor since the Out tag occurs in the template between the ForEach tag and the EndForEach tag. In the Tag Tree, expand <wr:forEach> -> ${varName1} and double-click **ProductName.** This automatically queries the ProductName currently held by the ForEach variable.



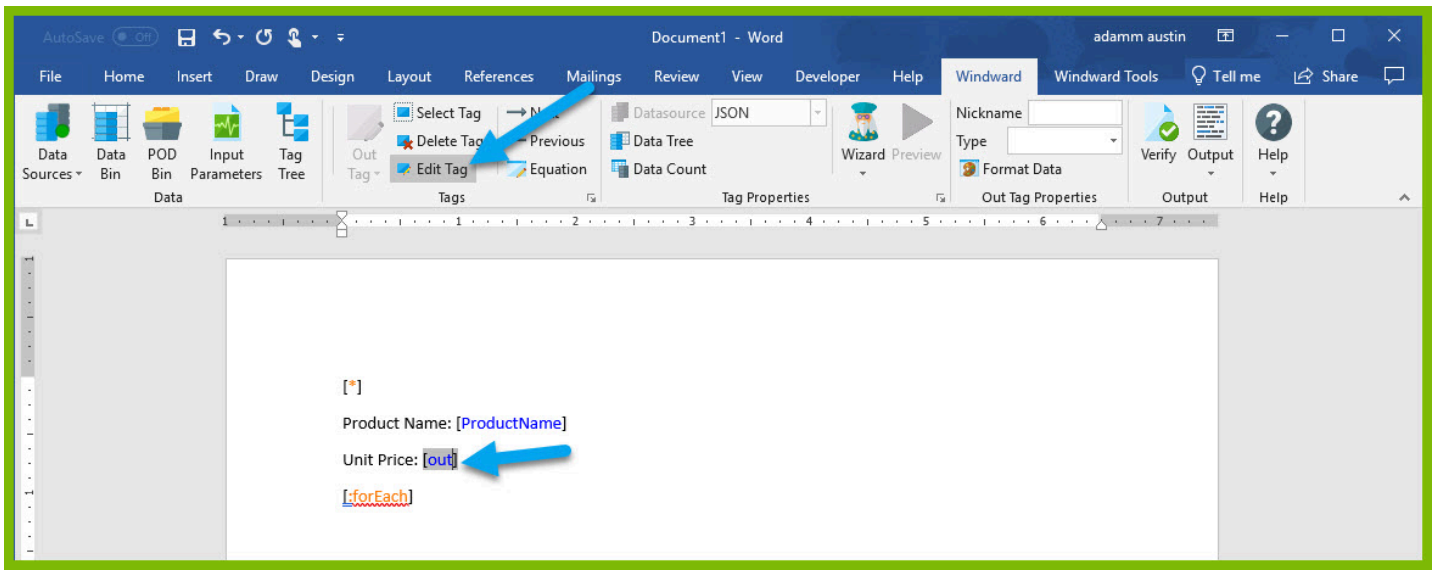
10. Click "**Save Tag**" button to save your tag's query.



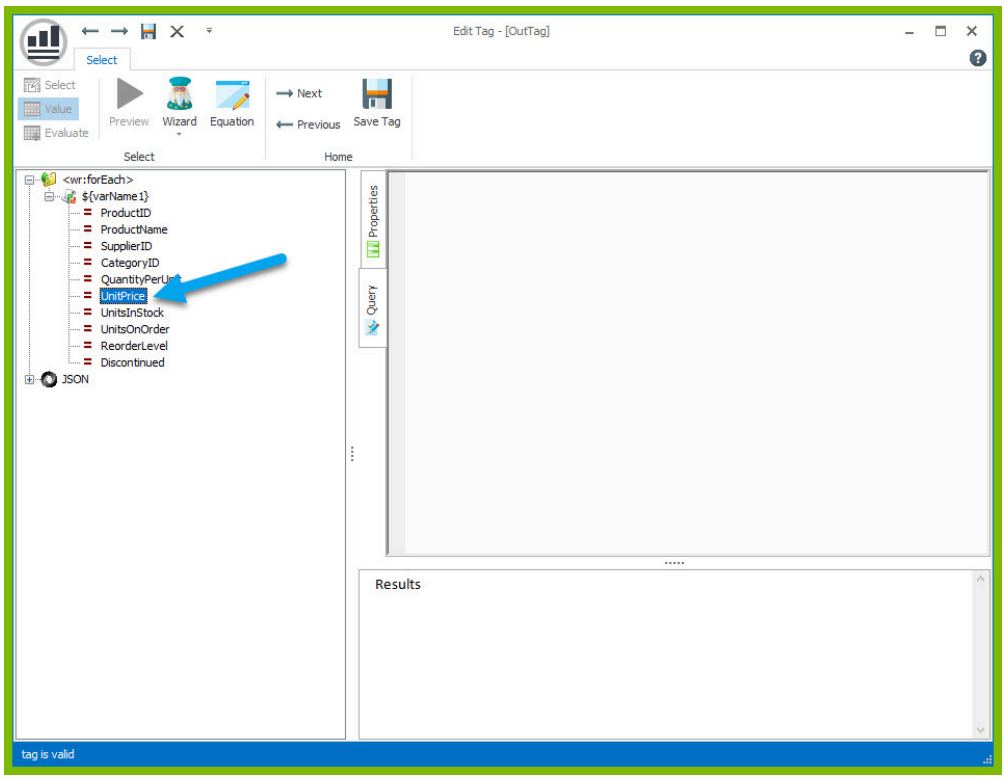
11. Place your cursor after the "Unit Price:" text, and click "**Tags**" in the Windward ribbon and click "**Out**." This places an out tag at the location of the cursor.



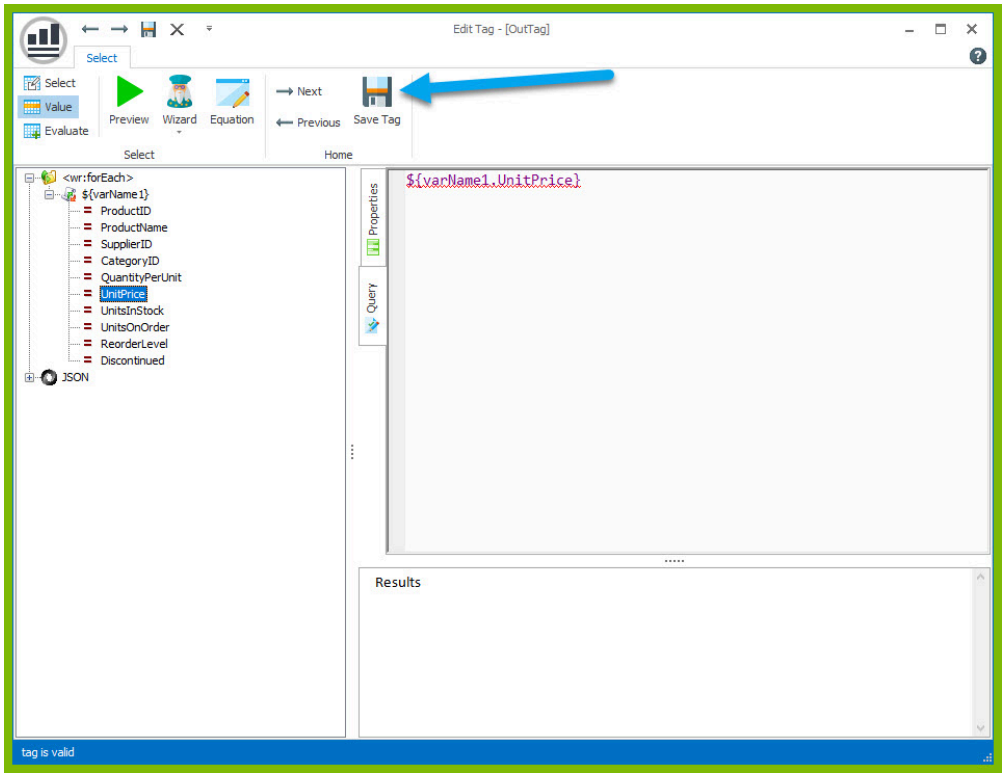
12. Open the tag Editor by placing your cursor on the Out tag and clicking "**Edit Tag**."



13. You can now see your ForEach variable in the tag editor since the Out tag occurs in the template between the ForEach tag and the EndForEach tag. Expand <wr:forEach> -> ${varName1} and double click **UnitPrice.** This automatically queries the UnitPrice currently held by the ForEach tag.

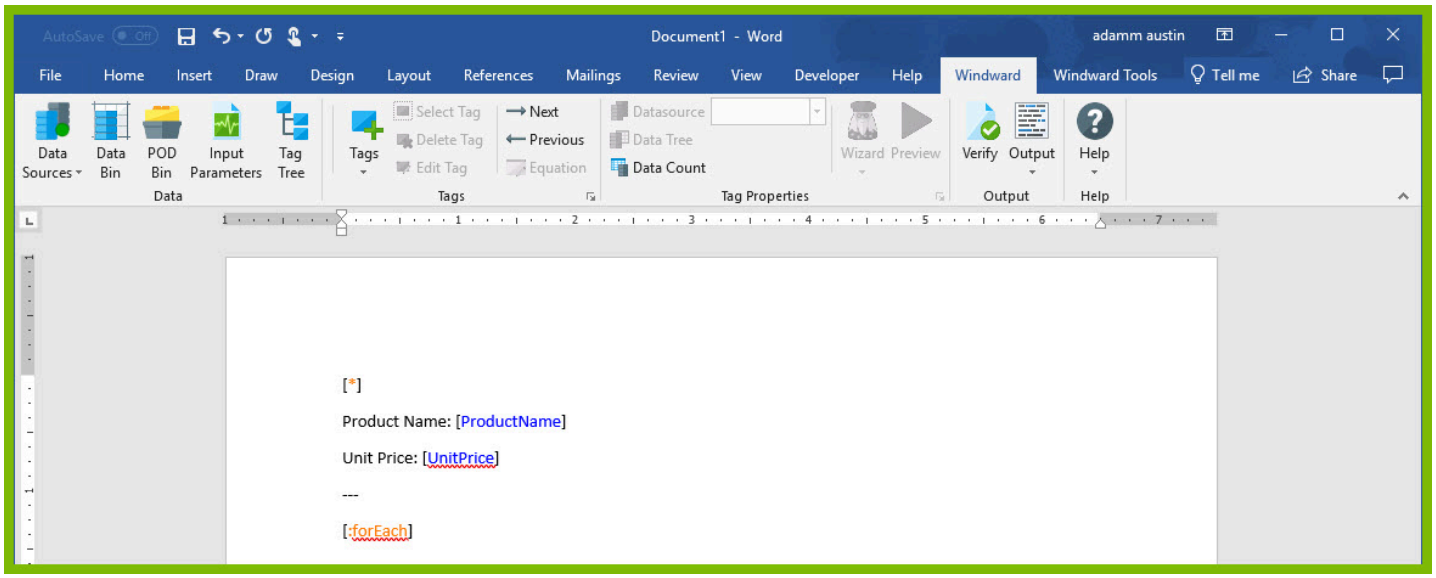


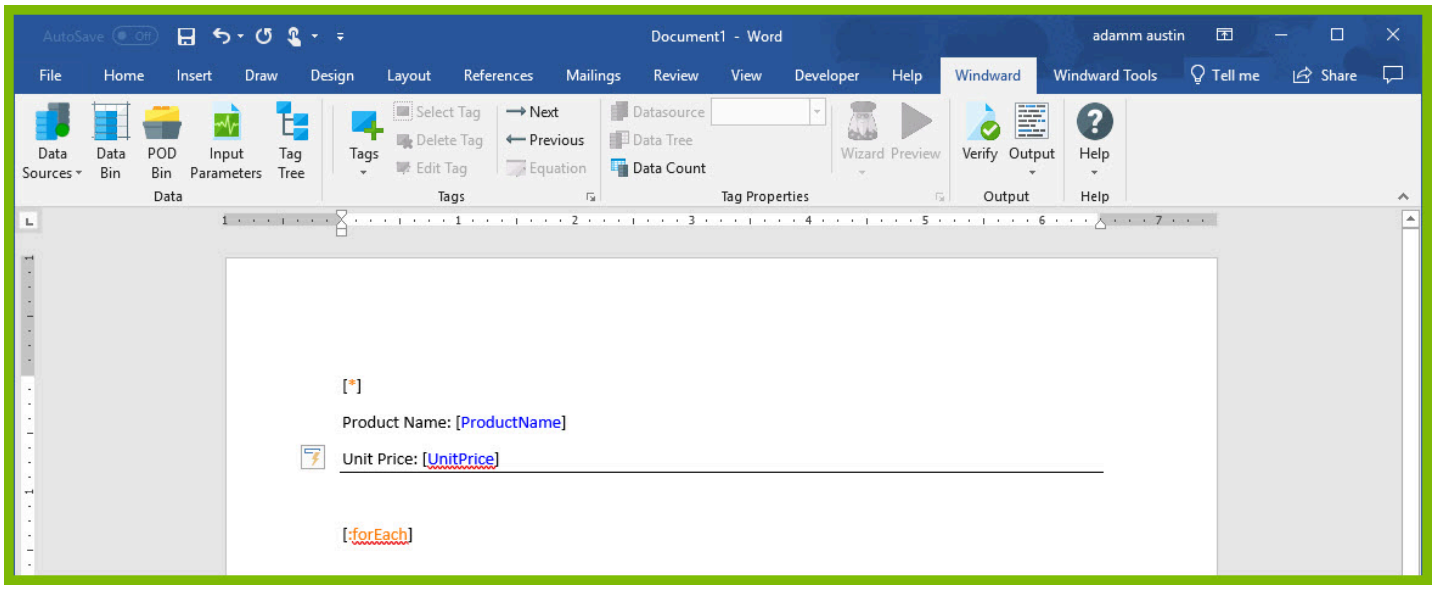
14. Click the **"Save Tag"** button to save your tag's query.



15. Finally, you are going to add some indicator between each product so you can easily distinguish between them in your output. Indent to a new line after the line starting with "UnitPrice:"

16. Add a horizontal line by typing “---” and pressing **Enter**. This will create a line across the document followed by an indentation.

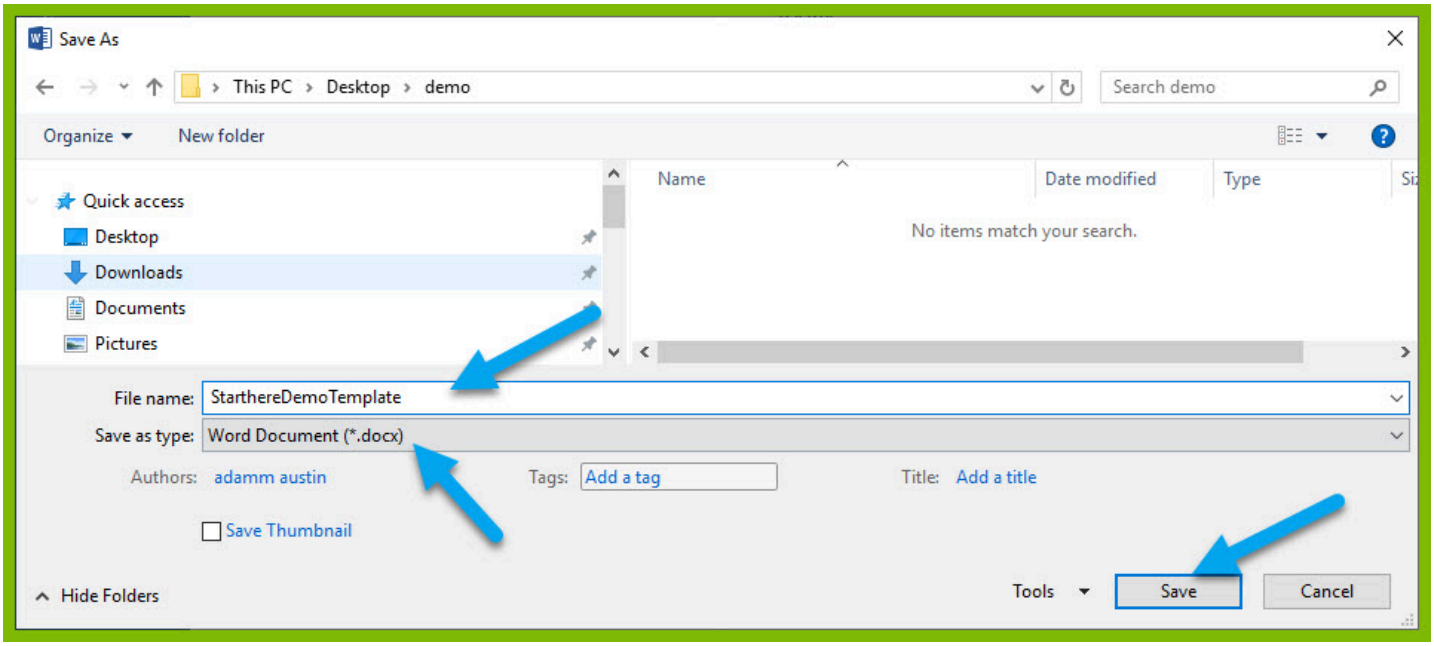




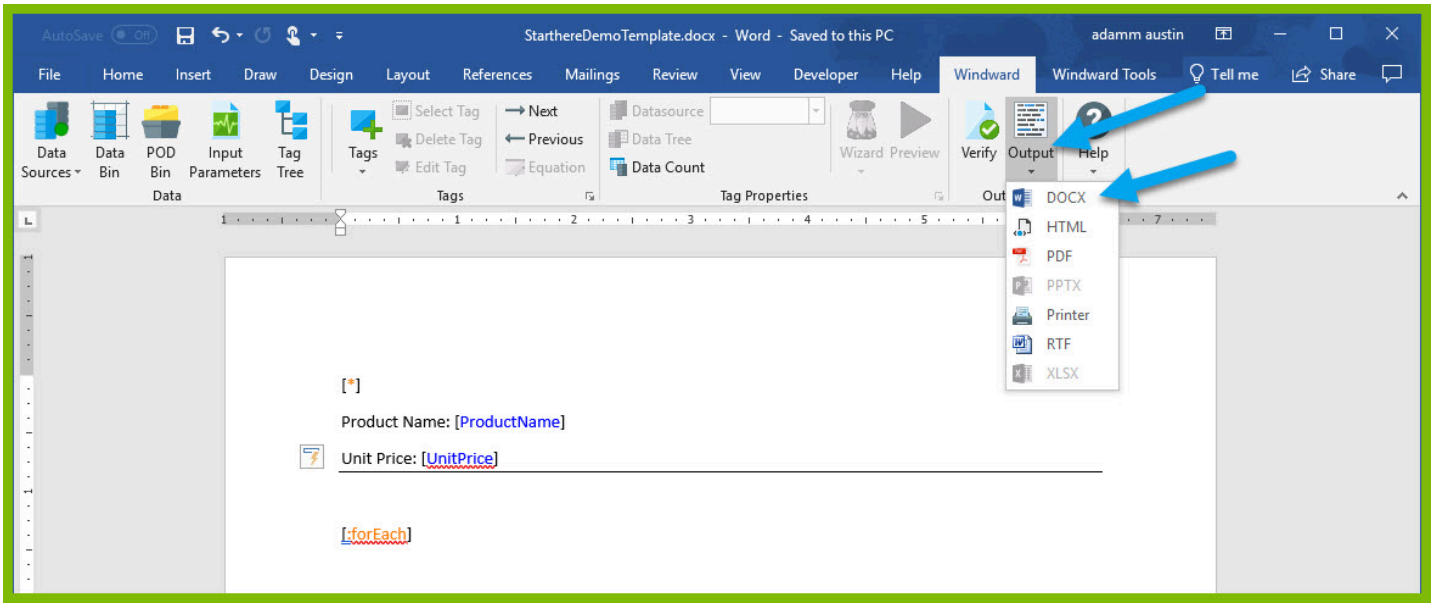
Now you are all finished with your template design!

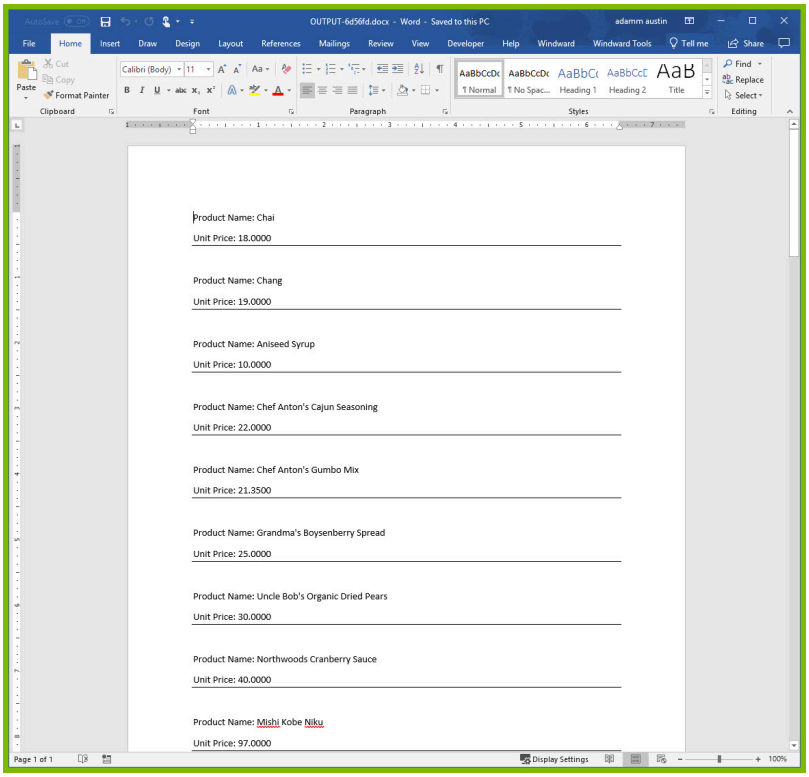
Step 4 - Output

1. Save your template. You can save your template to anywhere you want on your machine and give it any name you want. Be sure to save it as a “.docx” document.



2. In the “Windward” tab, click the “**Output**” button and from the drop down select “**DOCX**.”





Your template will output, and you should see a list of product names and their unit price with each product separated by a line.

Congratulations! You have created your first template in Windward Designer and produced your first output!

Next Steps

Now that you have finished this introduction tutorial, here are some resources we recommend you visit next:

1. How to connect to JSON datasources
2. How to use the XPath Wizard
3. The Windward Tutor: A collection of short video tutorials
4. Creating an Invoice in Windward Designer

Creating a Template in Word with SQL Data

Training Guide

Welcome to Windward Designer

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Training Overview

This Training Guide walks you through the fundamental steps you need to begin designing templates with Windward Designer in Microsoft Word using a SQL Datasource.

The Four Steps to Windward:

1. Install
2. Connect to data
3. Design your template & insert your data
4. Output

Step 1 - Install

To get started, you need to install the Designer. If you have it already installed, please skip this step!

If you already have a license key, please visit the downloads page to install the software.

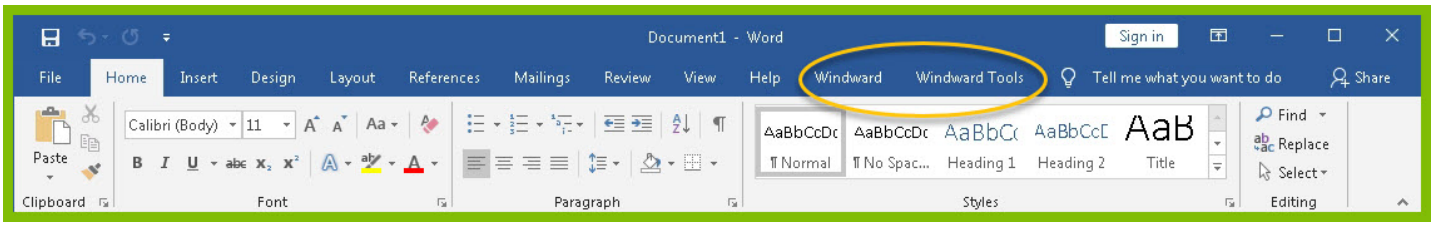
Or start a free 14-day trial!

Step 2 - Connect To Data

In this training guide, you are connecting to a sample SQL Datasource provided by Windward.

To connect to the sample data:

1. Open Microsoft Word. Now that you've installed Windward Designer, you will see two new tabs in the Microsoft Office Ribbon – the "**Windward**" Tab and the "**Windward Tools**" Tab.



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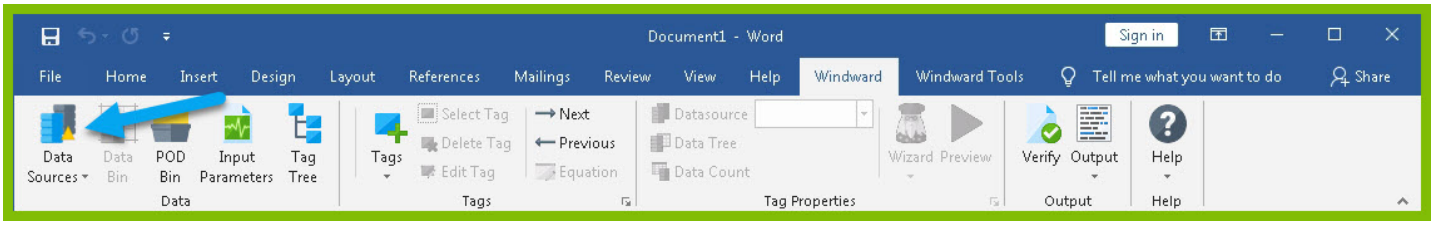
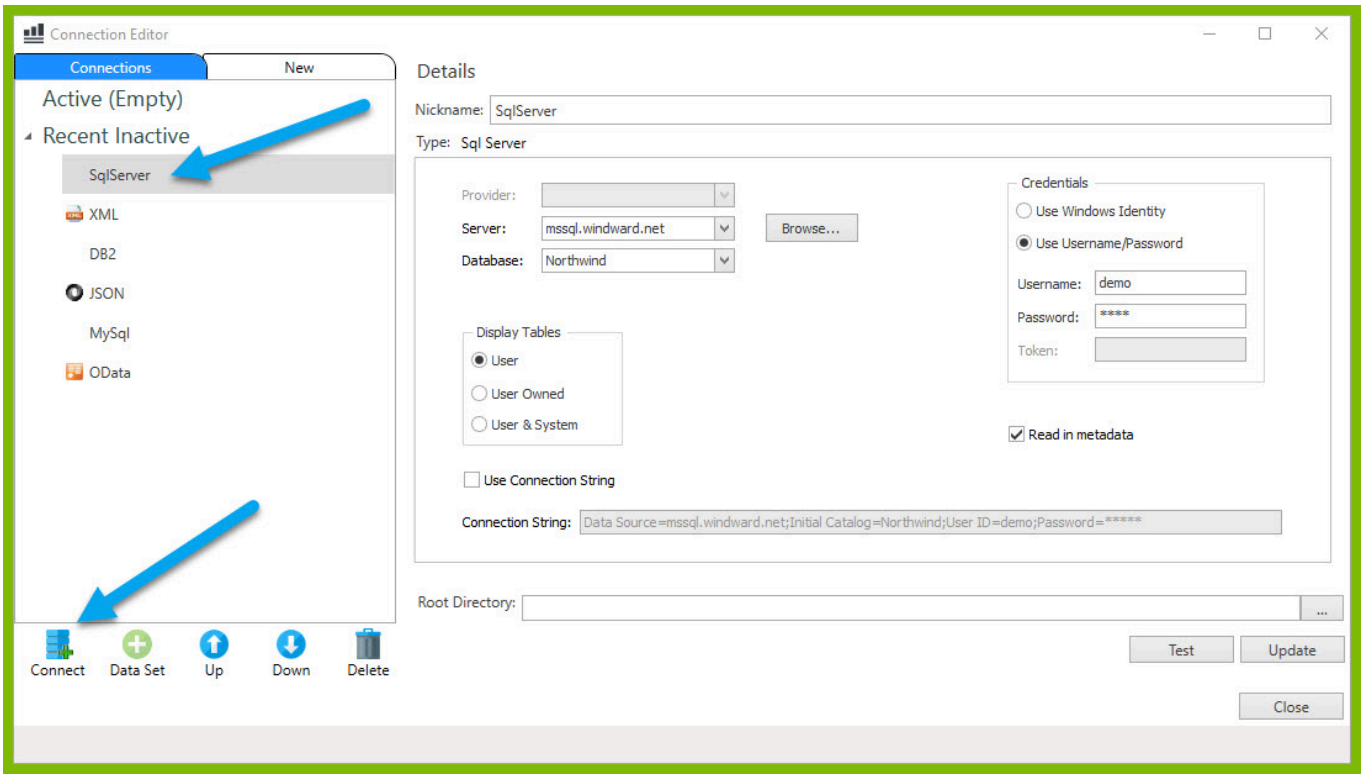
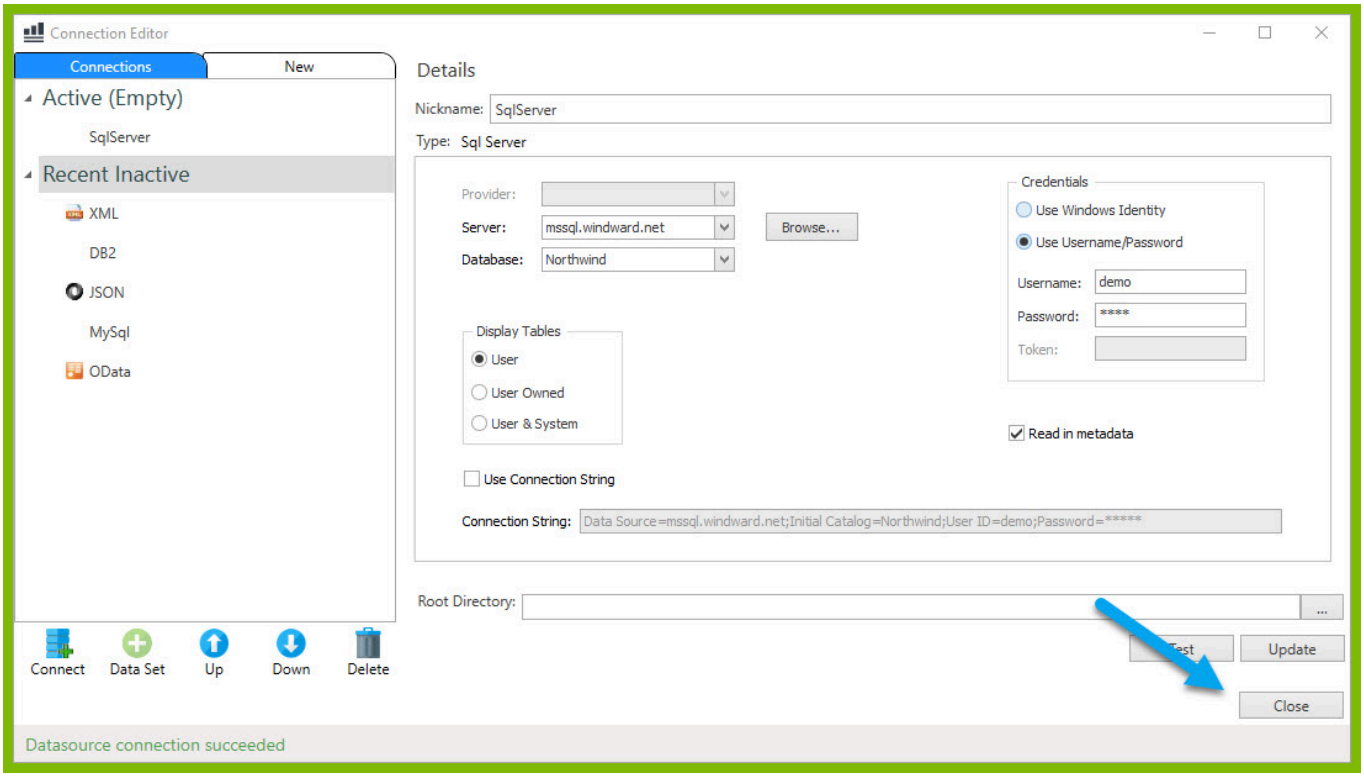


3. In the Connection Editor window, select the data connection labeled "**SqlServer**" under "Recent Inactive" and click the "**Connect**" button.



4. Close the Connection Editor by clicking **"Close."** You have now successfully connected to the sample data!

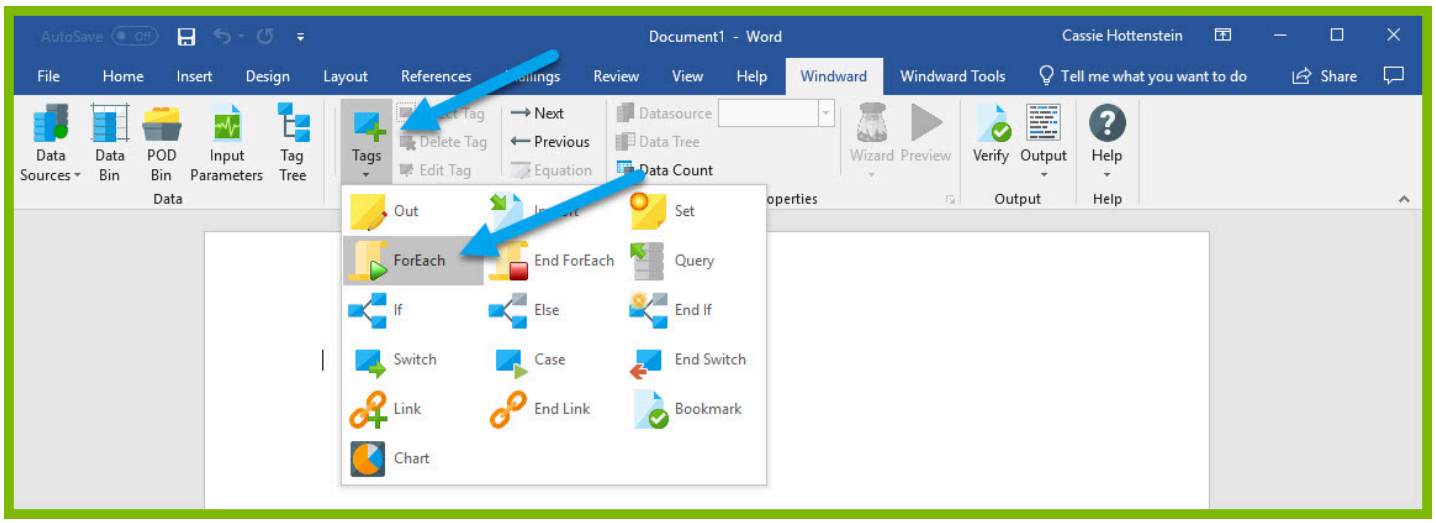


Step 3 - Design Your Template & Insert Your Data

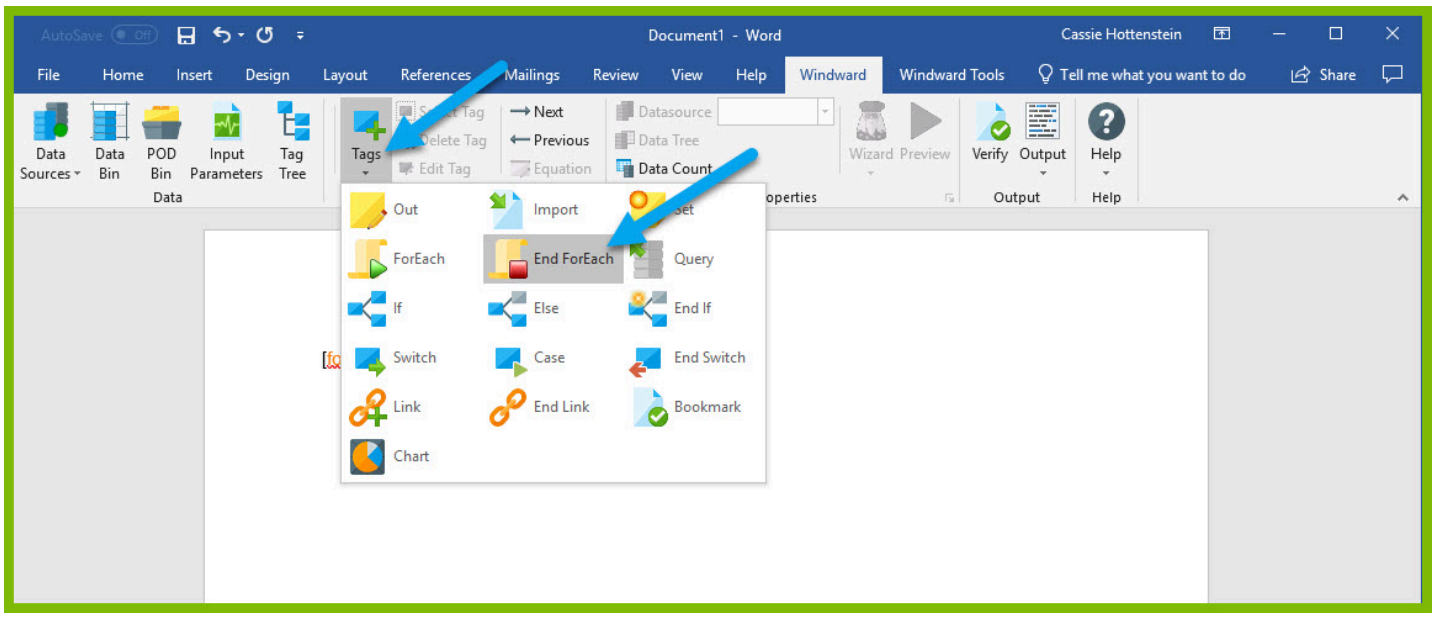
In this training guide, you will build a very basic template to get the feel of Windward Designer. While your final product may not seem very impressive, you will learn the basic skills to making any template! You will make a template which will output the product name and unit price for every product in the sample data, with each product separated by a line.

In situations where you want to output many records returned from a select, you can use a ForEach tag. The ForEach tag will generate output once for each record returned by its select. The ForEach tag itself will not insert data into the template, but rather stores data in a variable that can be used by other tags to generate output.

1. To place a ForEach tag, expand the drop down under the button "**Tags**" in the Windward ribbon and click "**ForEach**."

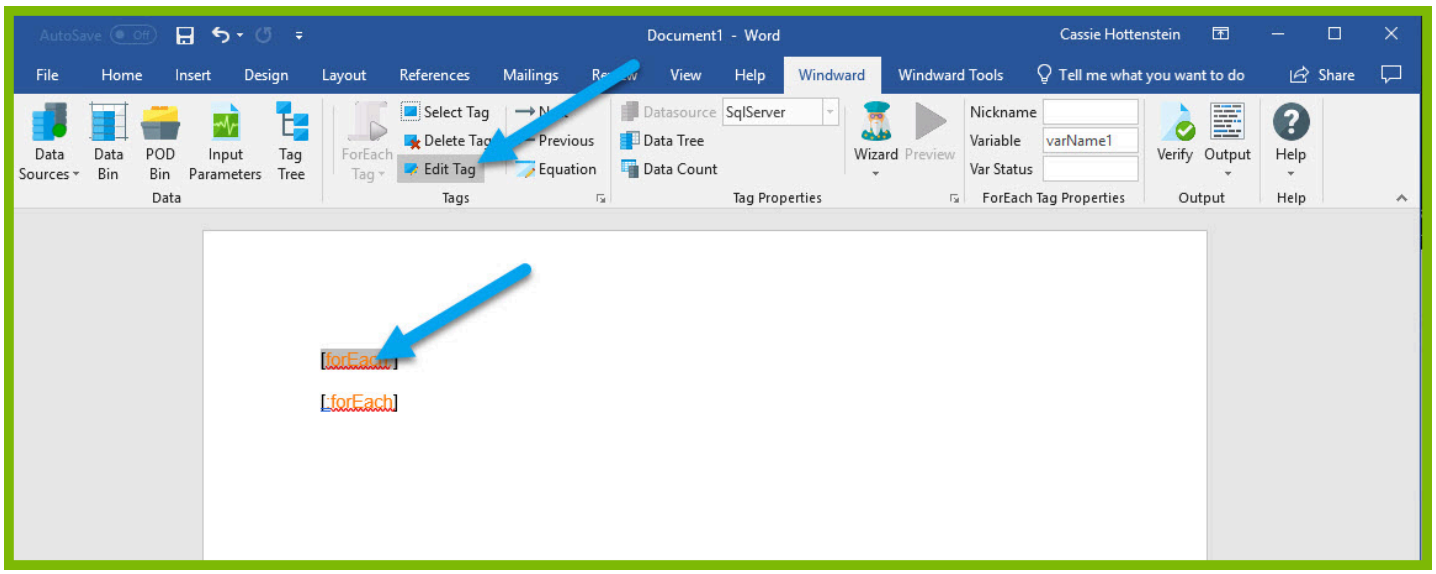


2. Click enter to move to a new line, expand the drop down under the button "**Tags**" in the Windward ribbon, and click "**EndForEach**" to place a closing tag for the ForEach tag.

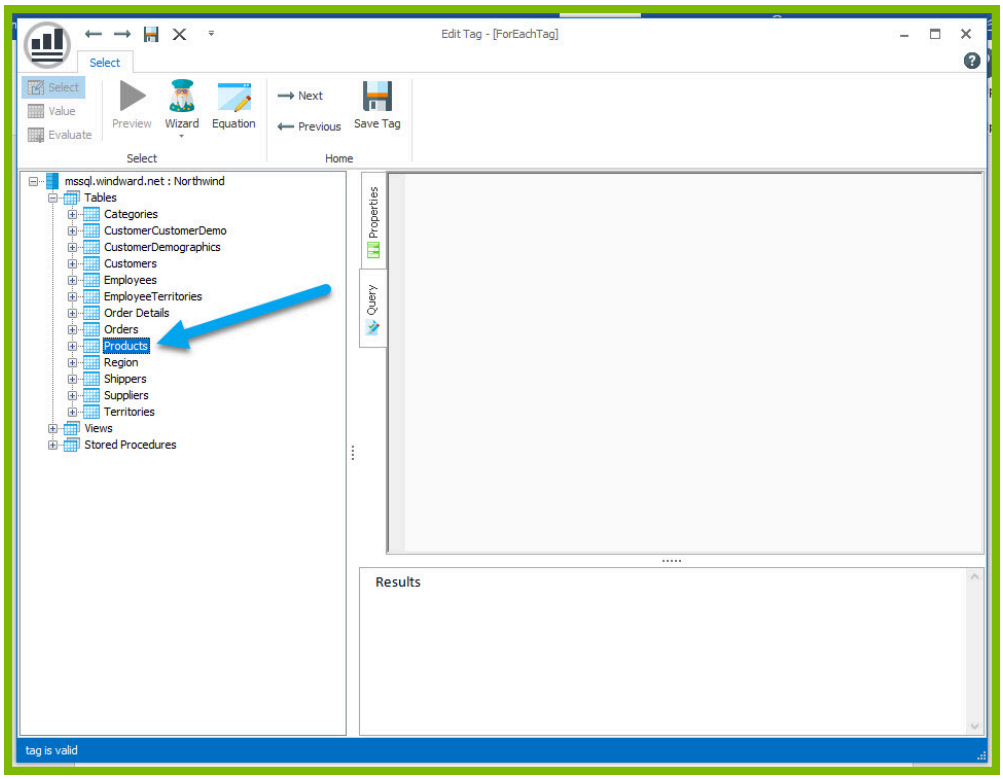


Now all of the content that you place between the ForEach and EndForEach tags will be generated once for each record returned by the ForEach tag's select.

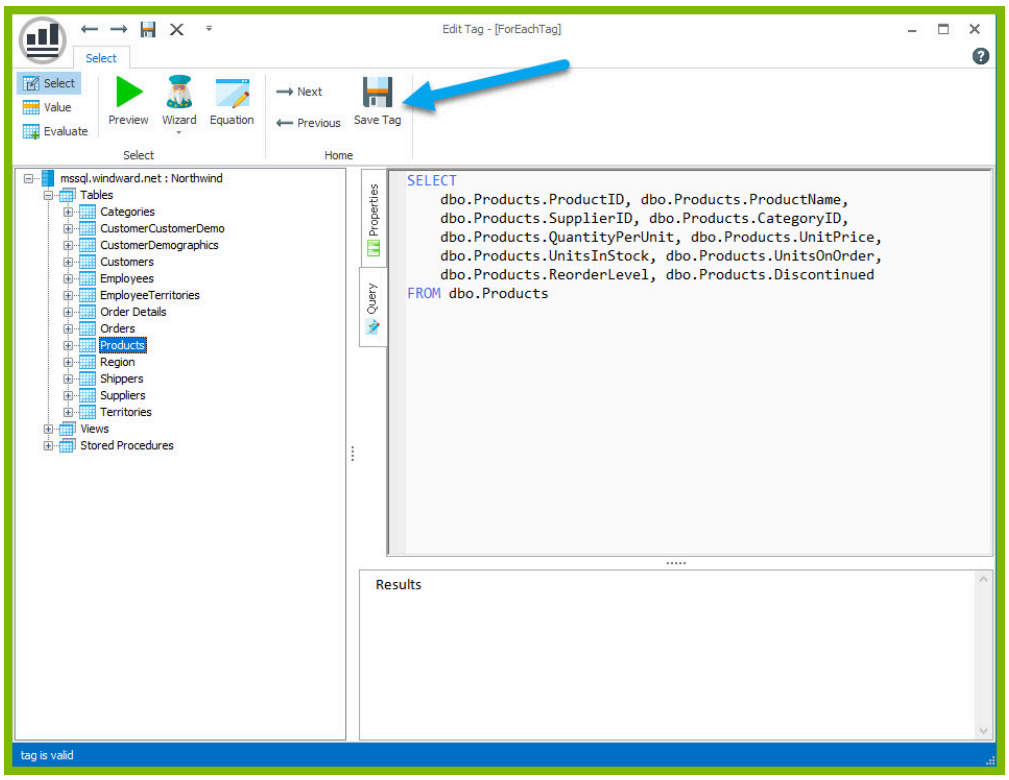
3. For the ForEach tag, you will select the Product table so that you can output information on each product. You can use the Tag Editor to easily create a query for your tag. Place your cursor on the **"[forEach:]"** tag that was inserted in your template and click the **"Edit Tag"** button in the Windward ribbon to open the Tag Editor.



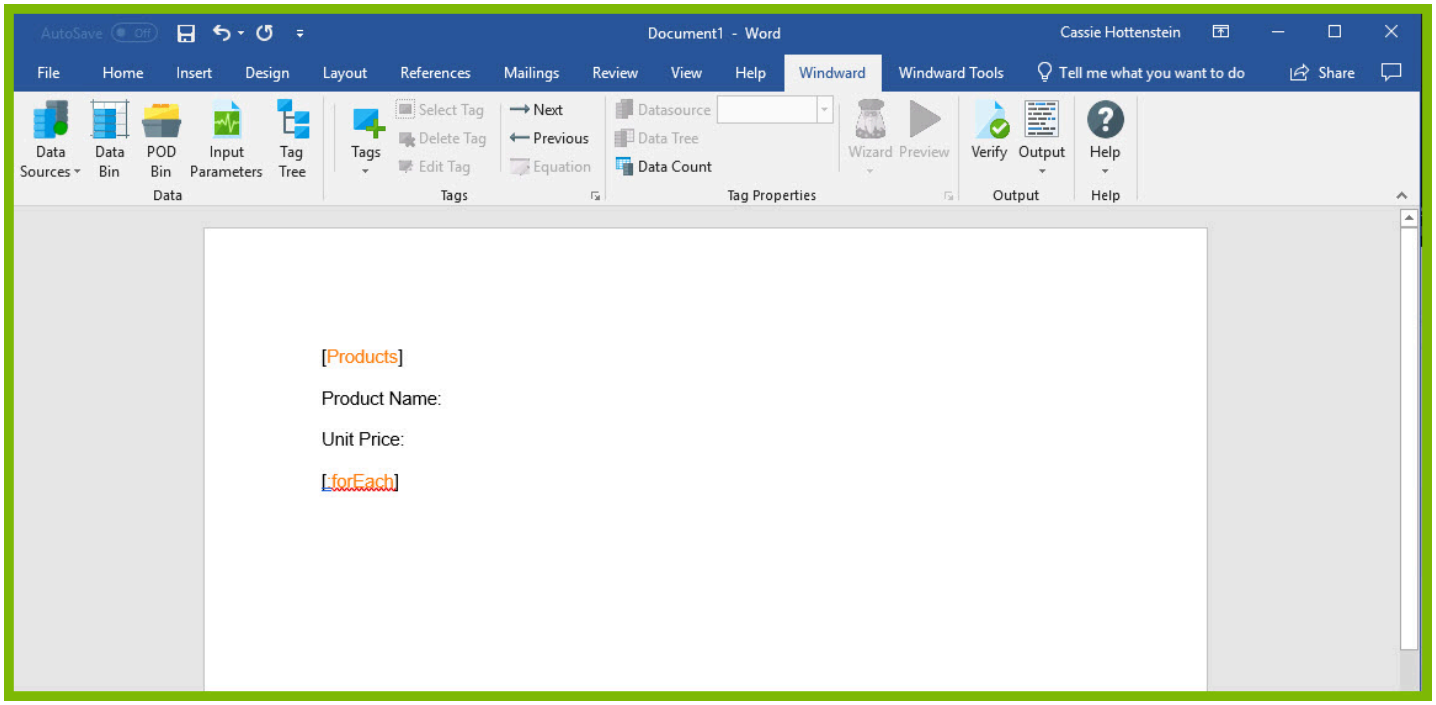
4. In the Tag Tree, expand the table mssql.windward.net : Northwind -> Tables -> Products and double-click the **"Products"**table. This will automatically write a select for the Products table.



5. Click the "**Save Tag**" button. Congratulations! You have just inserted your first tag into your template!



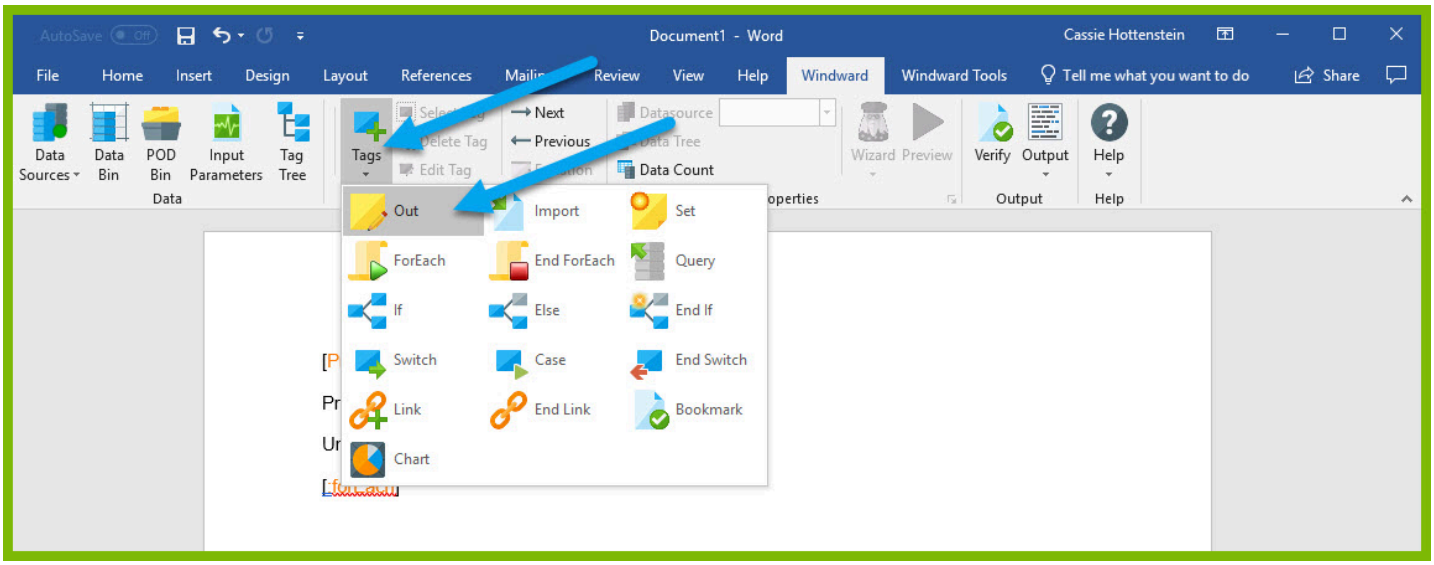
6. On a new line after the ForEach tag, enter the text “Product Name:” and on the next line “Unit Price:”



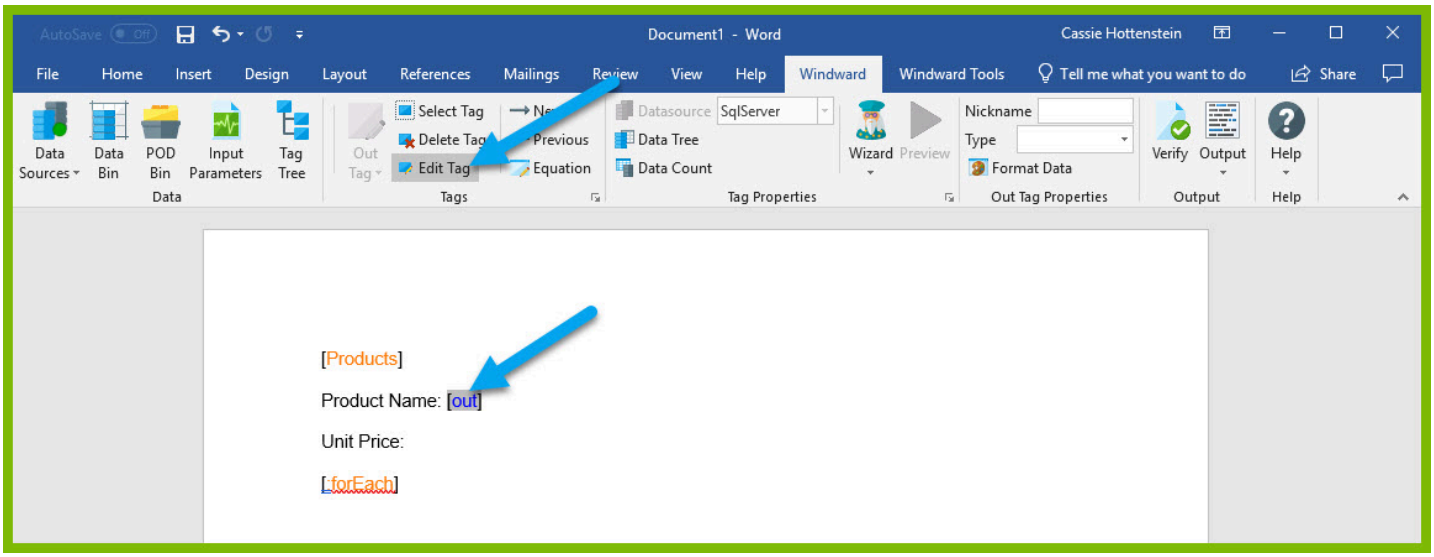
The “Product Name” and “Unit Price” text will be output for every product returned by your ForEach tag’s select.

Out tags will be used to insert data into your final report. These tags will output the Product Name and Unit Price for each product after these labels.

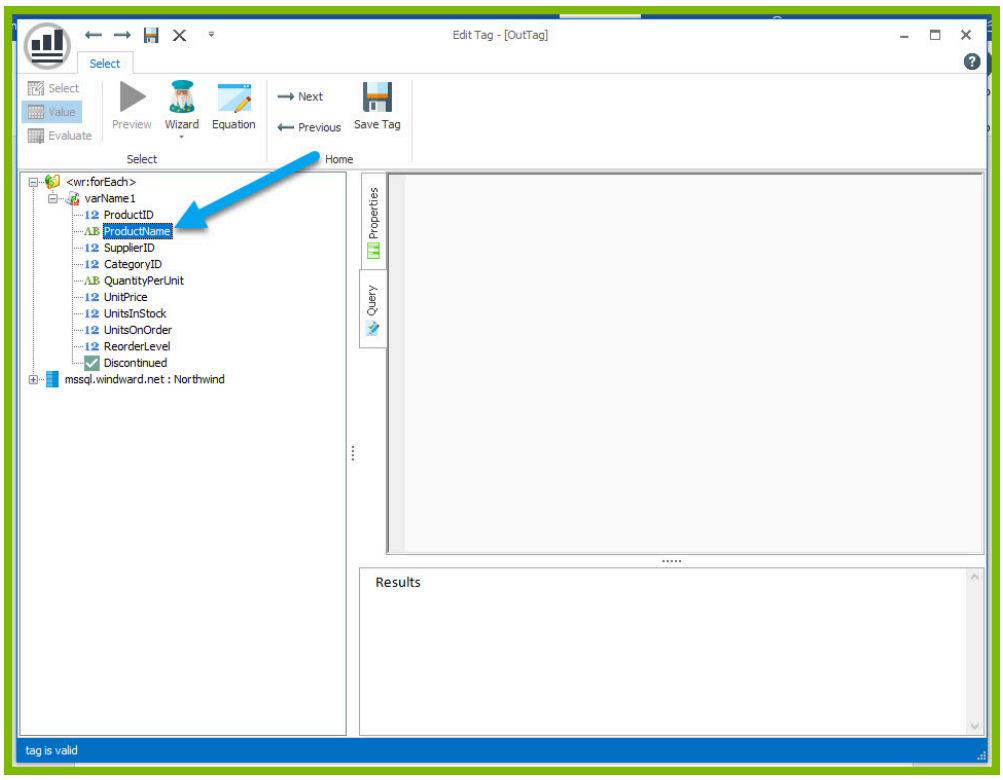
7. Place your cursor after the “Product Name:” text, and click “**Tags**” in the Windward ribbon and click “**Out.**” This places an Out tag at the location of the cursor.



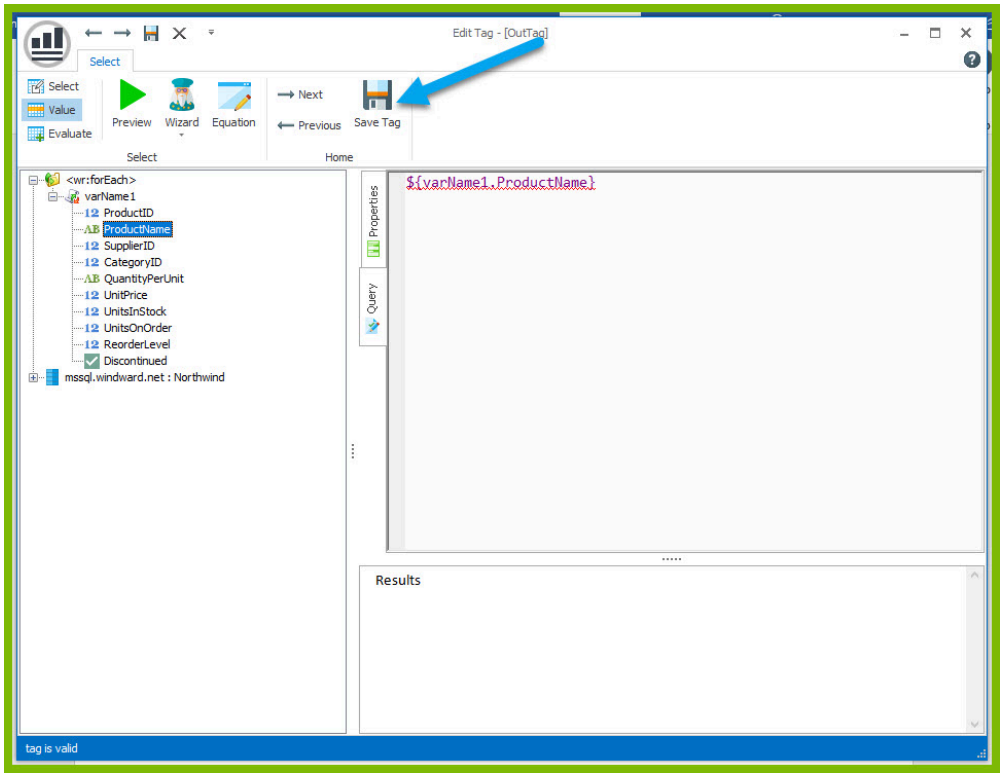
8. Open the tag Editor by placing your cursor on the Out tag and clicking “**Edit Tag**.”



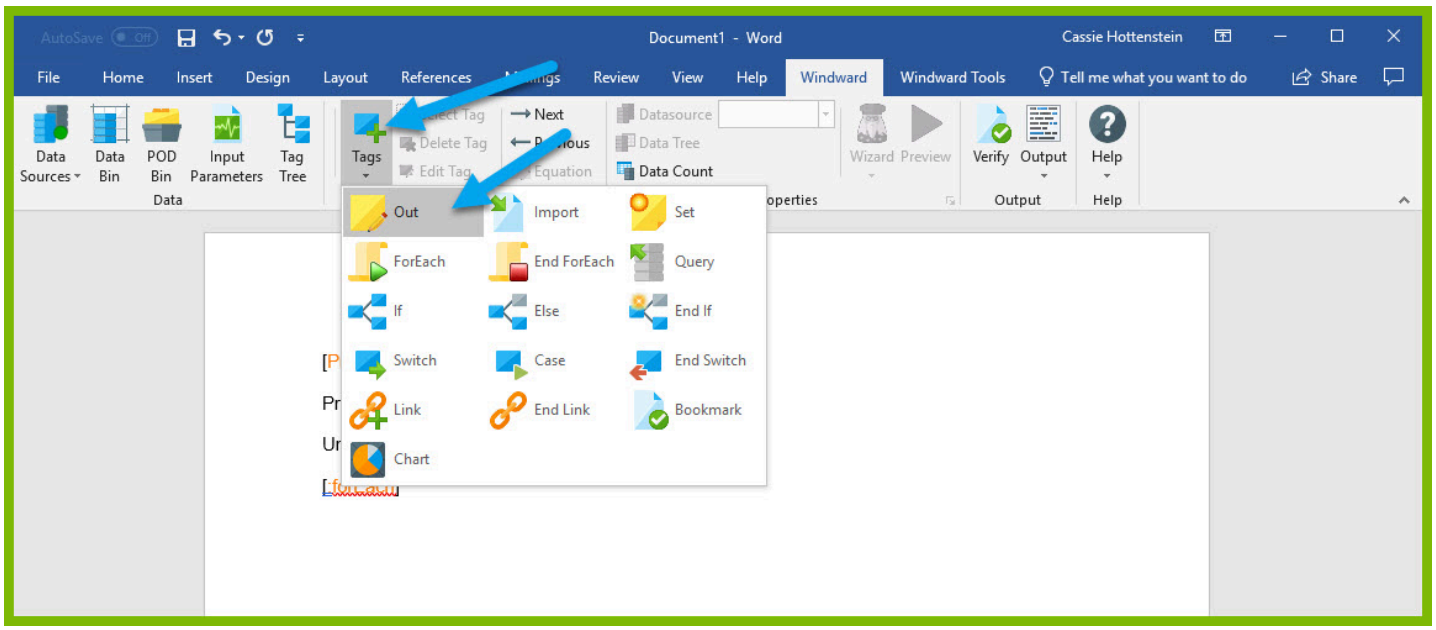
9. You can now see your ForEach variable in the tag editor since the Out tag occurs in the template between the ForEach tag and the EndForEach tag. In the Tag Tree, expand <wr:forEach> -> varName1 and double-click **“ProductName.”** This automatically queries the ProductName currently held by the ForEach variable.



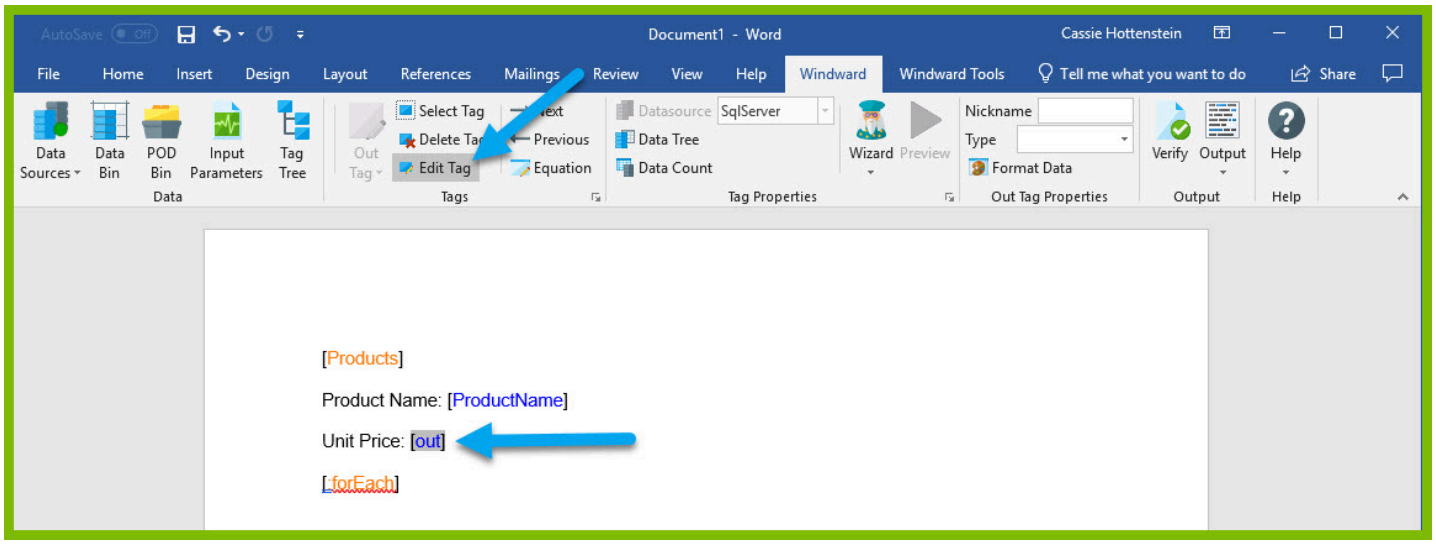
10. Click "**Save Tag**" button to save your tag's query.



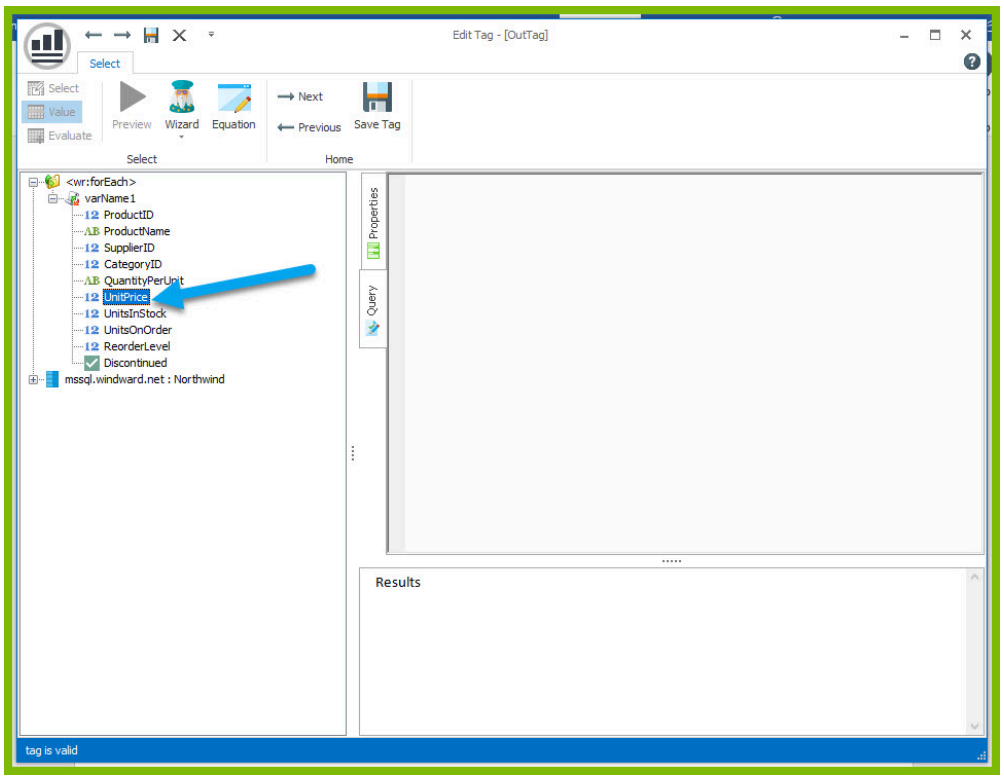
11. Place your cursor after the "Unit Price:" text, and click "**Tags**" in the Windward ribbon and click "**Out**." This places an out tag at the location of the cursor.



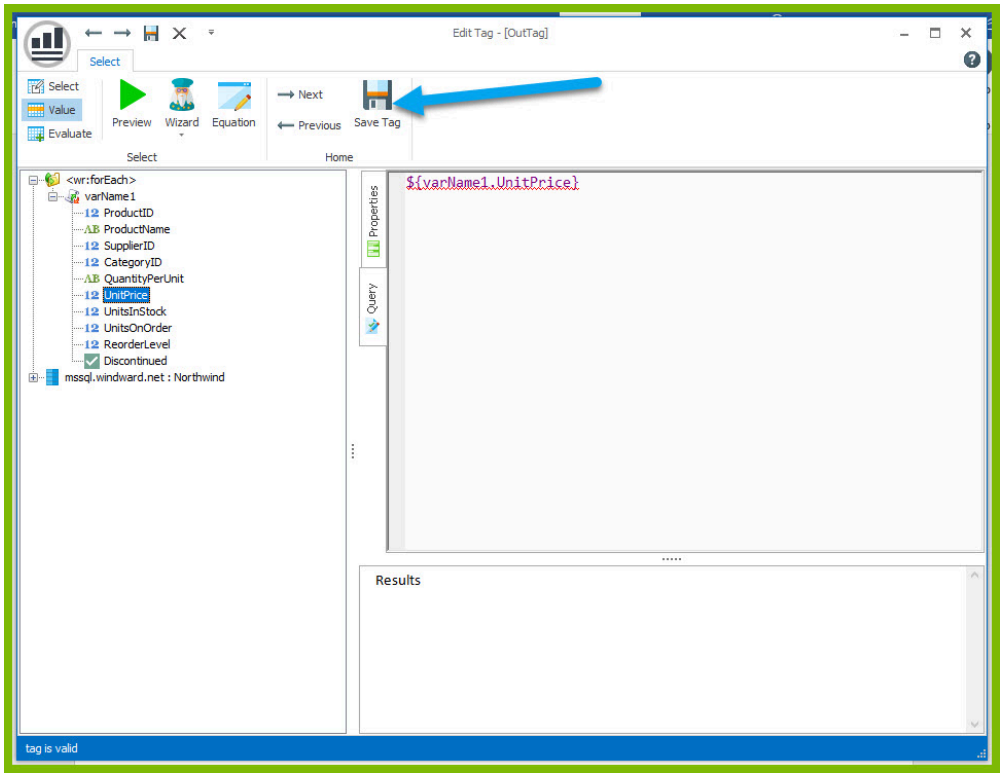
12. Open the tag Editor by placing your cursor on the Out tag and clicking "**Edit Tag**."



13. You can now see your ForEach variable in the tag editor since the Out tag occurs in the template between the ForEach tag and the EndForEach tag. Expand <wr:forEach> -> varName1 and double click **UnitPrice**. This automatically queries the UnitPrice currently held by the ForEach tag.

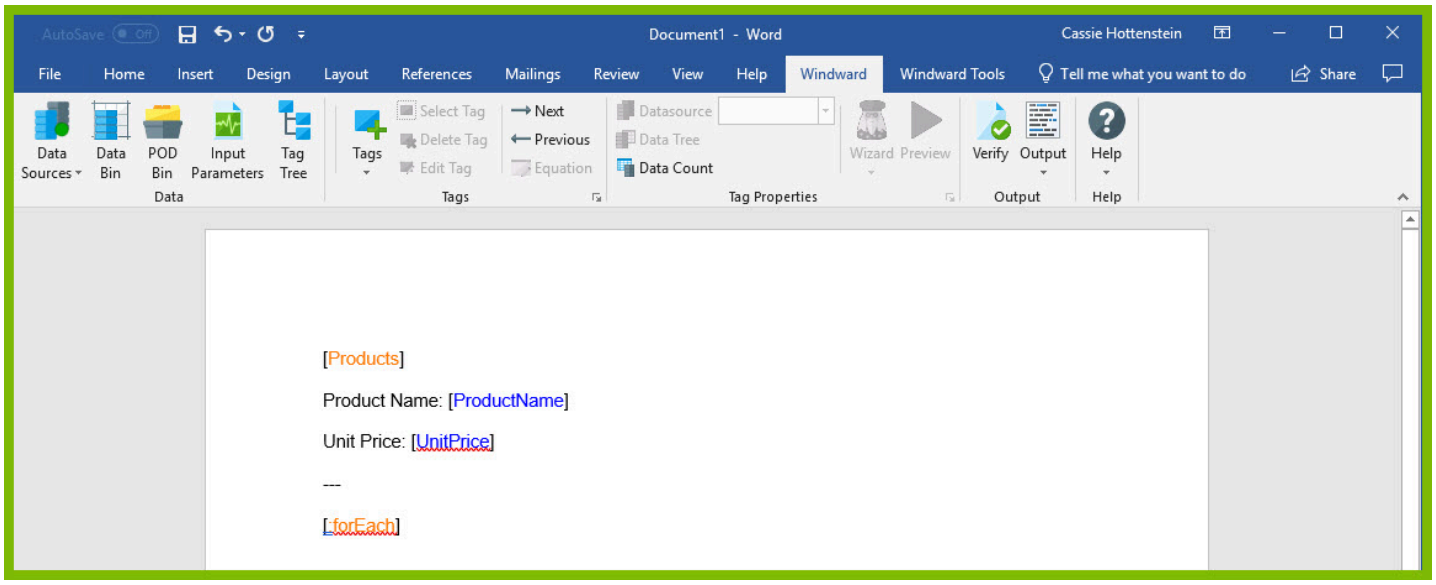


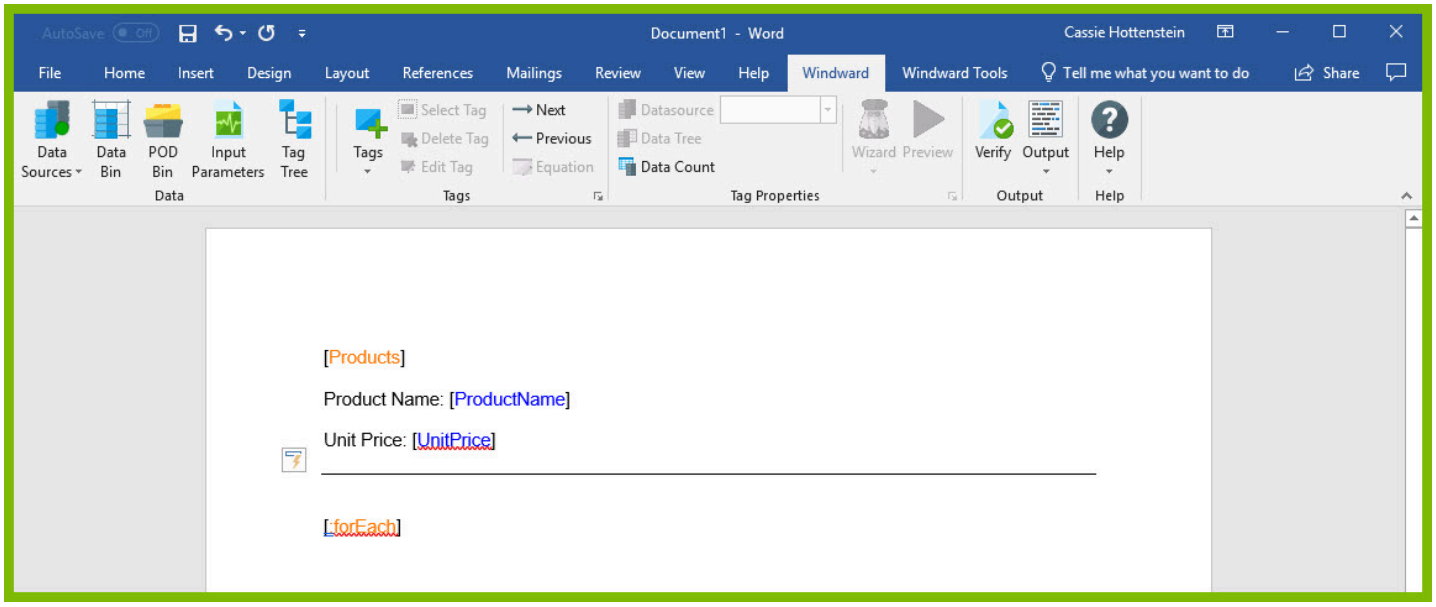
14. Click the **"Save Tag"** button to save your tag's query.



15. Finally, you are going to add some indicator between each product so you can easily distinguish between them in your output. Indent to a new line after the line starting with "UnitPrice:"

16. Add a horizontal line by typing "---" and pressing **Enter**. This will create a line across the document followed by an indentation.

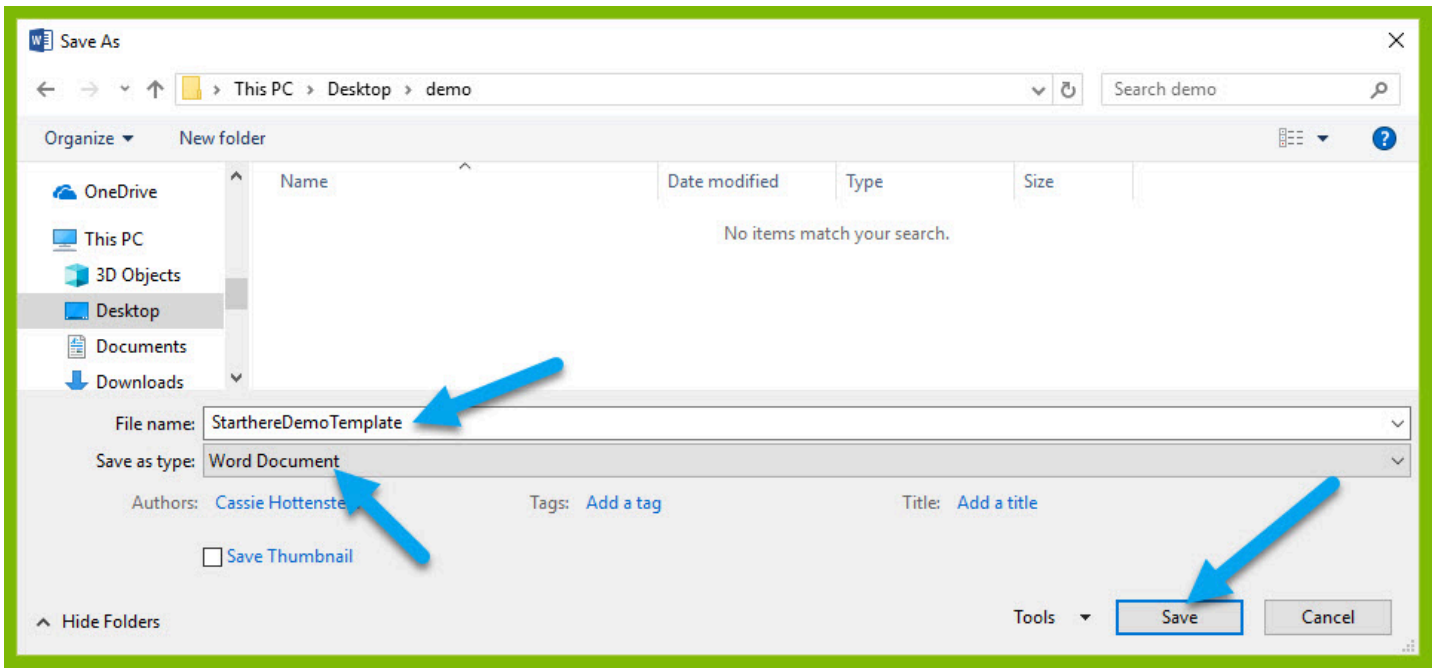




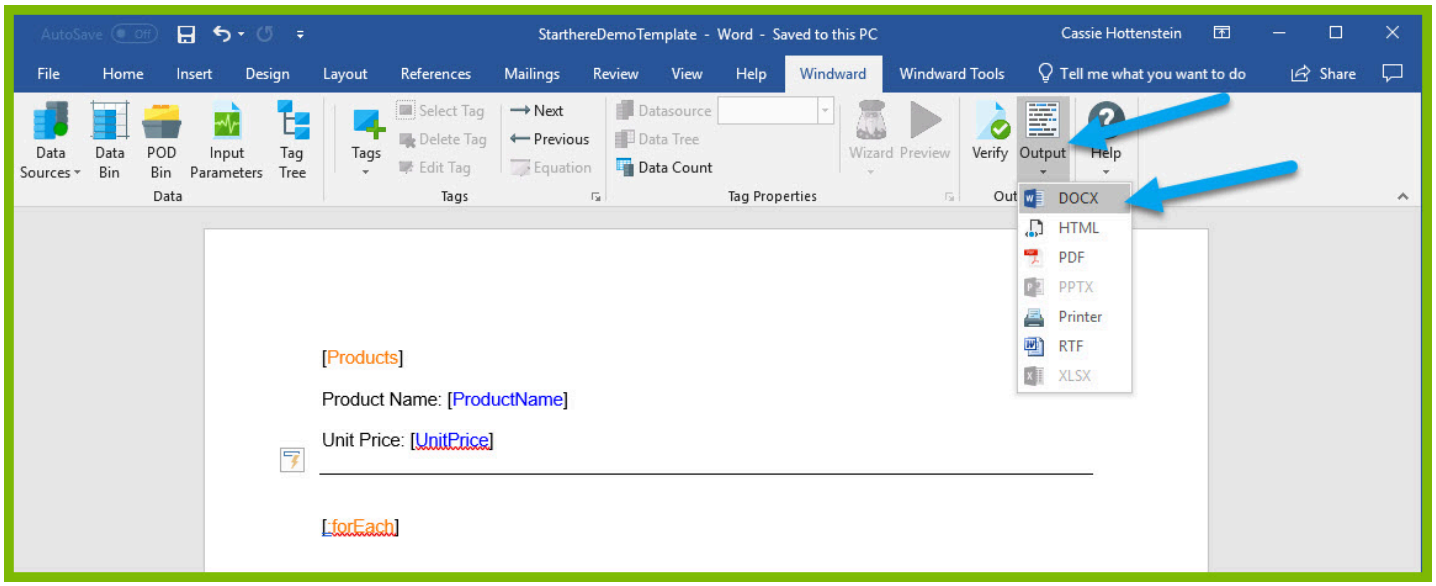
Now you are all finished with your template design!

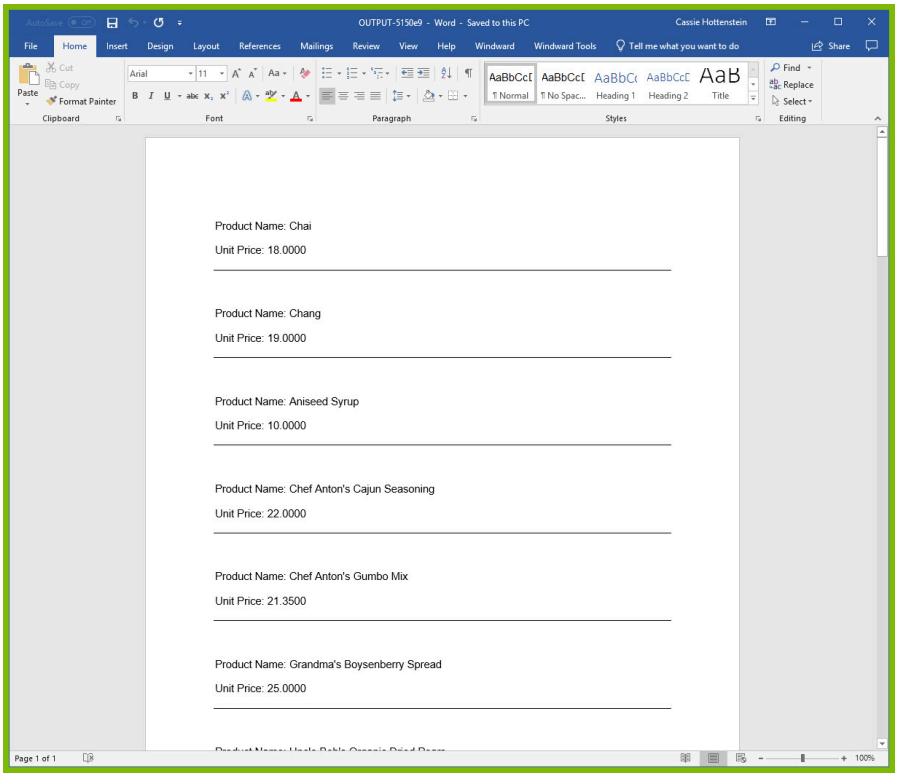
Step 4 - Output

1. Save your template. You can save your template to anywhere you want on your machine and give it any name you want. Be sure to save it as a ".docx" document.



2. In the “Windward” tab, click the “**Output**” button and from the drop down select “**DOCX**.”





Your template will output, and you should see a list of product names and their unit price with each product separated by a line.

Congratulations! You have created your first template in Windward Designer and produced your first output!

Next Steps

Now that you have finished this introduction tutorial, here are some resources we recommend you visit next:

1. How to connect to SQL datasources
2. How to use the XPath Wizard
3. The Windward Tutor: A collection of short video tutorials
4. Creating an Invoice in Windward Designer

Creating a Template in Word with XML Data

Training Guide

Welcome to Windward Designer

Windward Studios takes a unique approach to reporting. Our Report Designer sits directly inside Microsoft Office which means you get to use a **familiar and powerful tool** without having to learn a new designer. If you've ever used one of our competitors' products, you may be familiar with their modular designers that require you to build reports using bits and pieces, where every bit of text or every piece of data is a distinct object in your template. Windward changes all of that. With Windward in Microsoft Office, you **design report templates just like you design any other document**, utilizing Tags to insert your data wherever you need it seamlessly in-line with your other text and content.

Training Overview

This Training Guide walks you through the fundamental steps you need to begin designing templates with Windward Designer in Microsoft Word using an XML Datasource.

The Four Steps to Windward:

1. Install
2. Connect to data
3. Design your template & insert your data
4. Output

Step 1 - Install

To get started, you need to install the Designer. If you have it already installed, please skip this step!

If you already have a license key, please visit the downloads page to install the software.

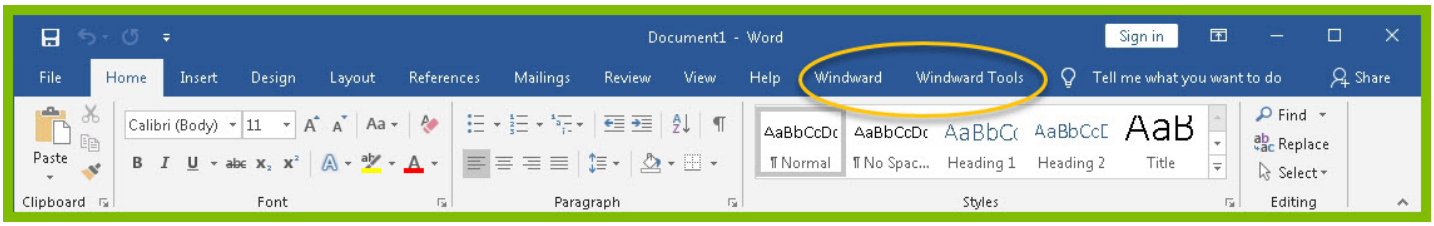
Or start a free 14-day trial!

Step 2 - Connect To Data

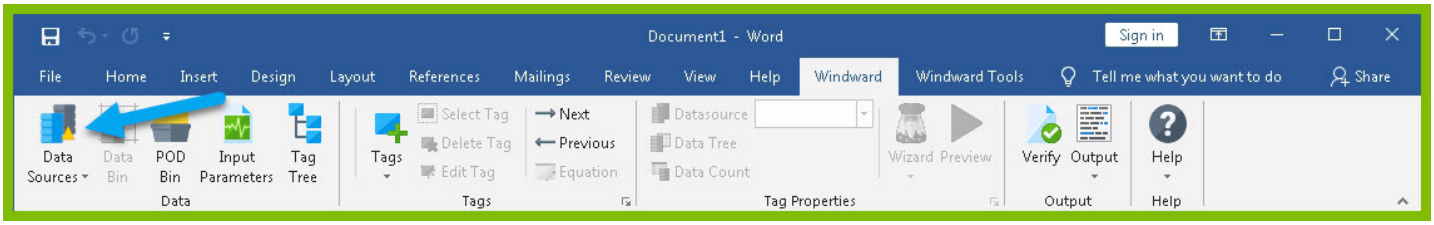
In this training guide, you are connecting to a sample XML Datasource provided by Windward.

To connect to the sample data:

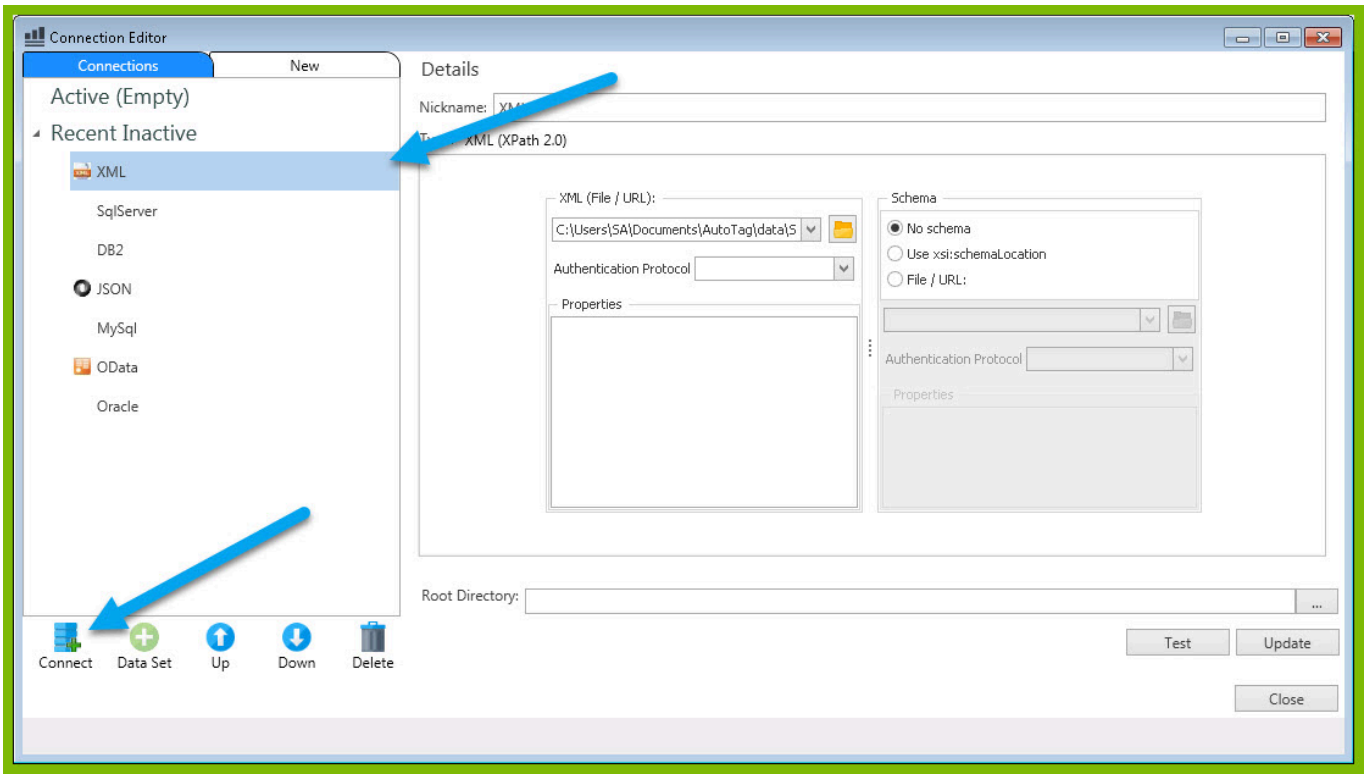
1. Open Microsoft Word. Now that you've installed Windward Designer, you will see two new tabs in the Microsoft Office Ribbon – the "**Windward**" Tab and the "**Windward Tools**" Tab.



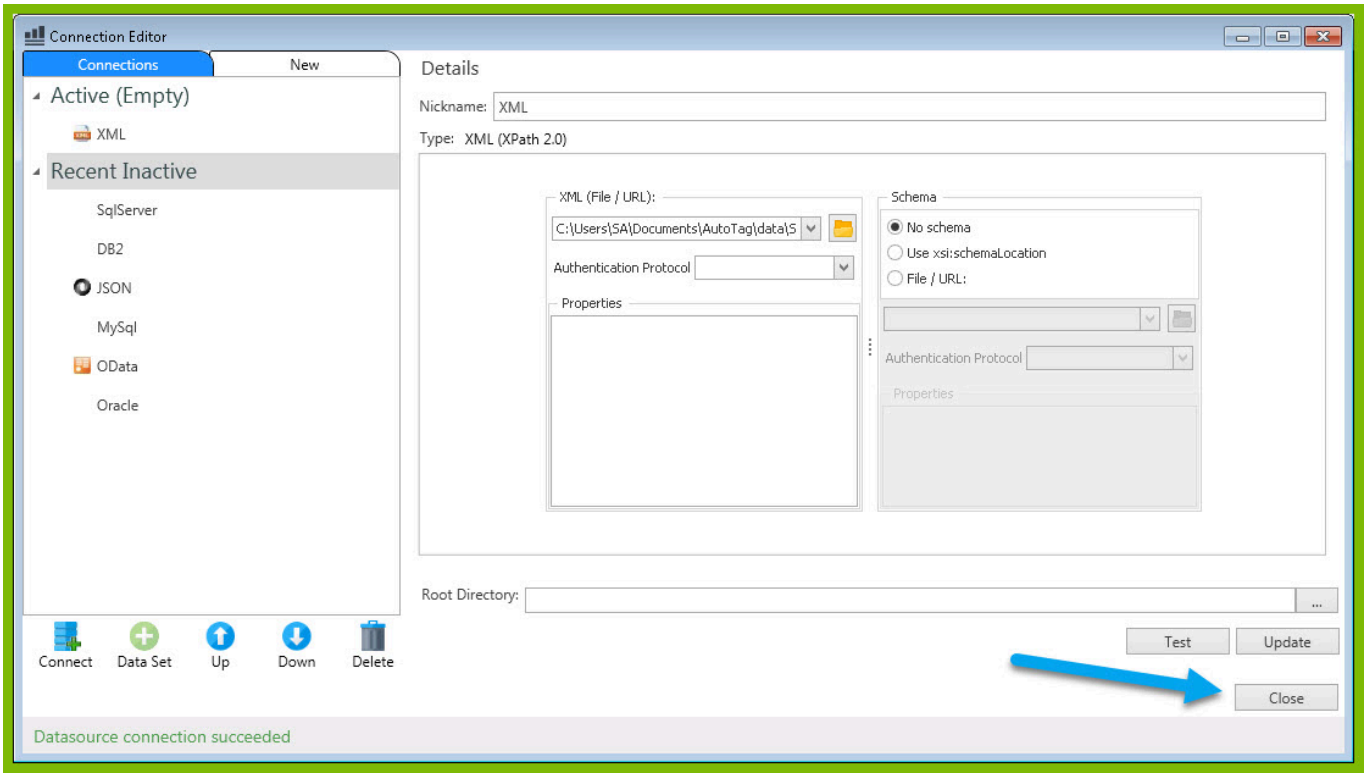
2. Click on the **"Windward Tab"** and click on the **"Data Sources"** button located on the left-hand side of the ribbon. This opens the Connection Editor where you will manage all of your data connections. (Alternatively, you can click on the lower half of the button to expand the drop down and then click **"Data Sources."**)



3. In the Connection Editor window, select the data connection labeled "**XML**" under "Recent Inactive" and click the "**Connect**" button.



4. Close the Connection Editor by clicking **"Close."** You have now successfully connected to the sample data!

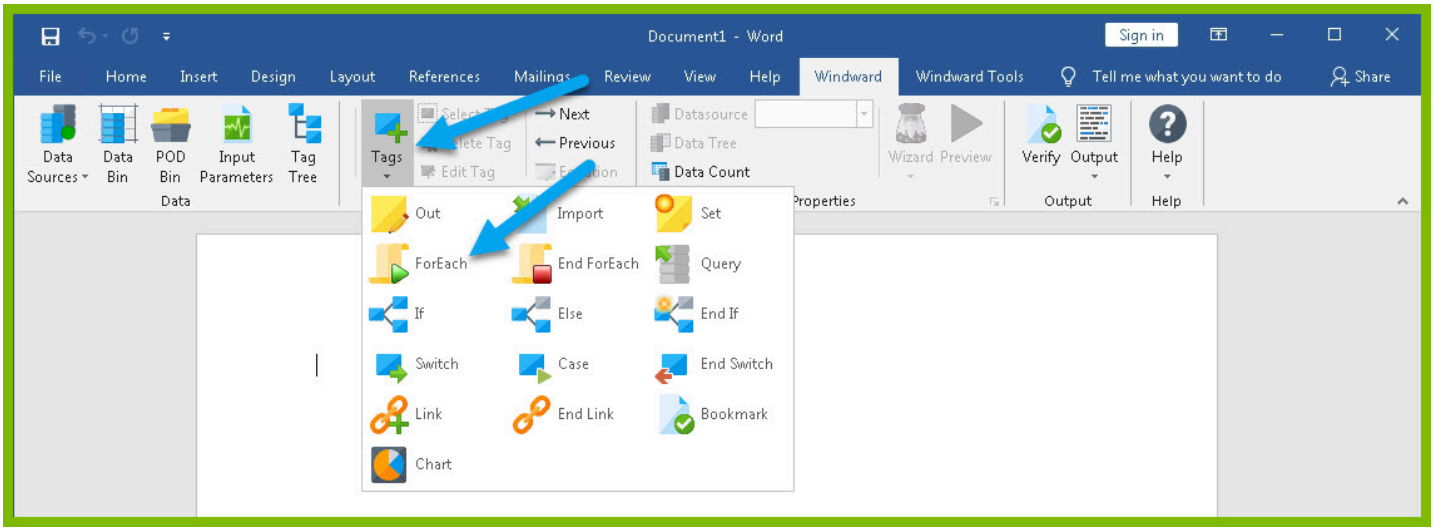


Step 3 - Design Your Template & Insert Your Data

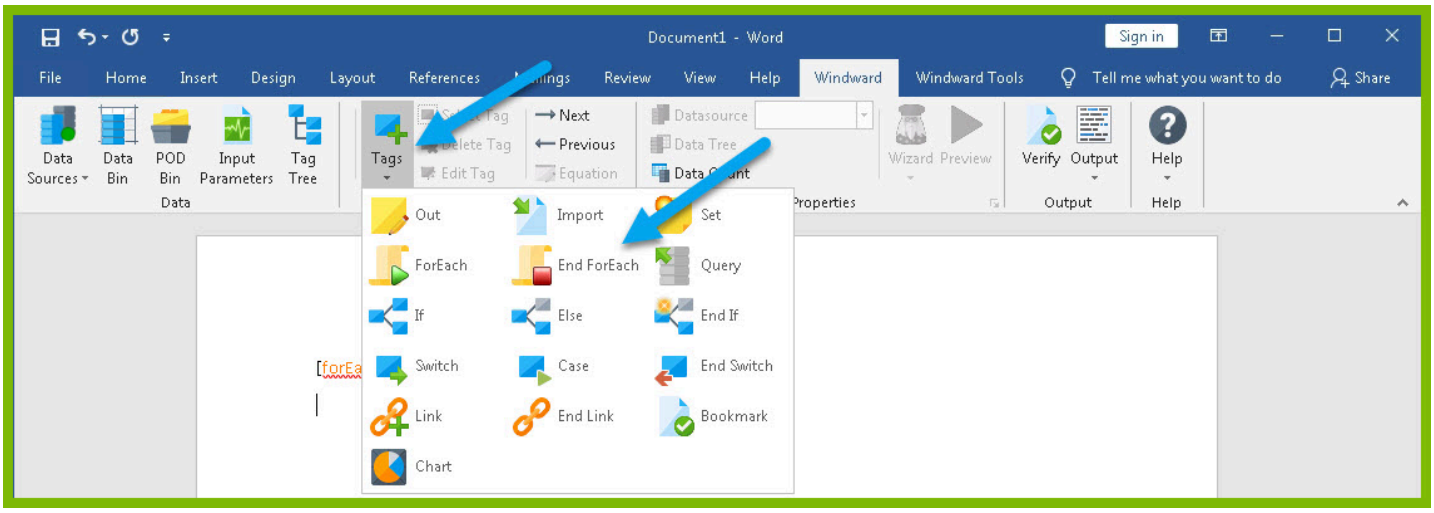
In this training guide, you will build a very basic template to get the feel of Windward Designer. While your final product may not seem very impressive, you will learn the basic skills to making any template! You will make a template which will output the product name and unit price for every product in the sample data, with each product separated by a line.

In situations where you want to output many records returned from a select, you can use a ForEach tag. The ForEach tag will generate output once for each record returned by its select. The ForEach tag itself will not insert data into the template, but rather stores data in a variable that can be used by other tags to generate output.

1. To place a ForEach tag, expand the drop down under the button "**Tags**" in the Windward ribbon and click "**ForEach**."

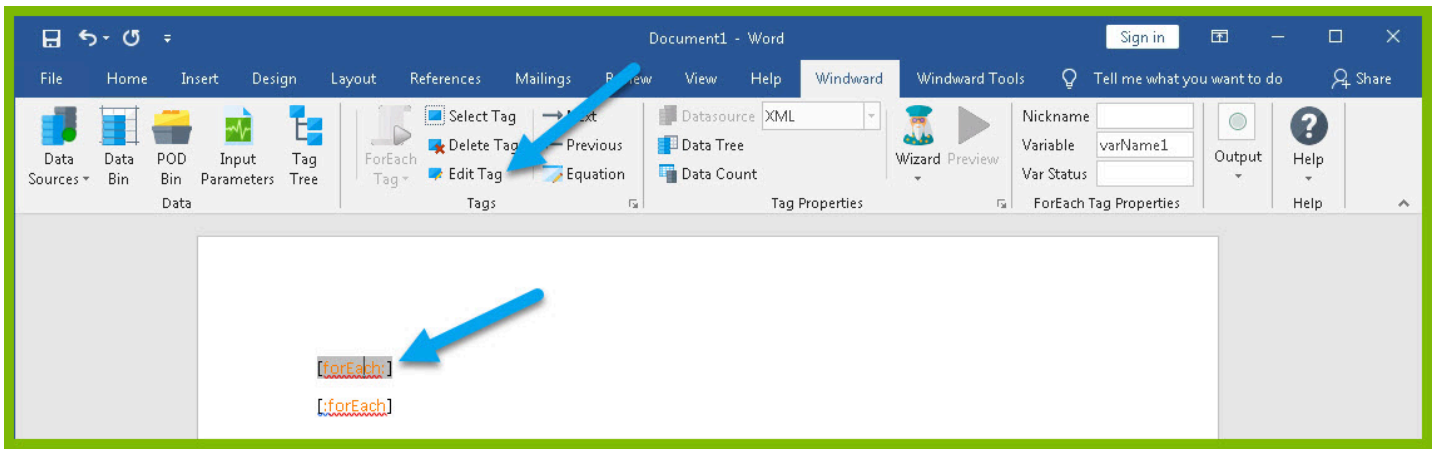


2. Click enter to move to a new line, expand the drop down under the button "**Tags**" in the Windward ribbon, and click "**EndForEach**" to place a closing tag for the ForEach tag.

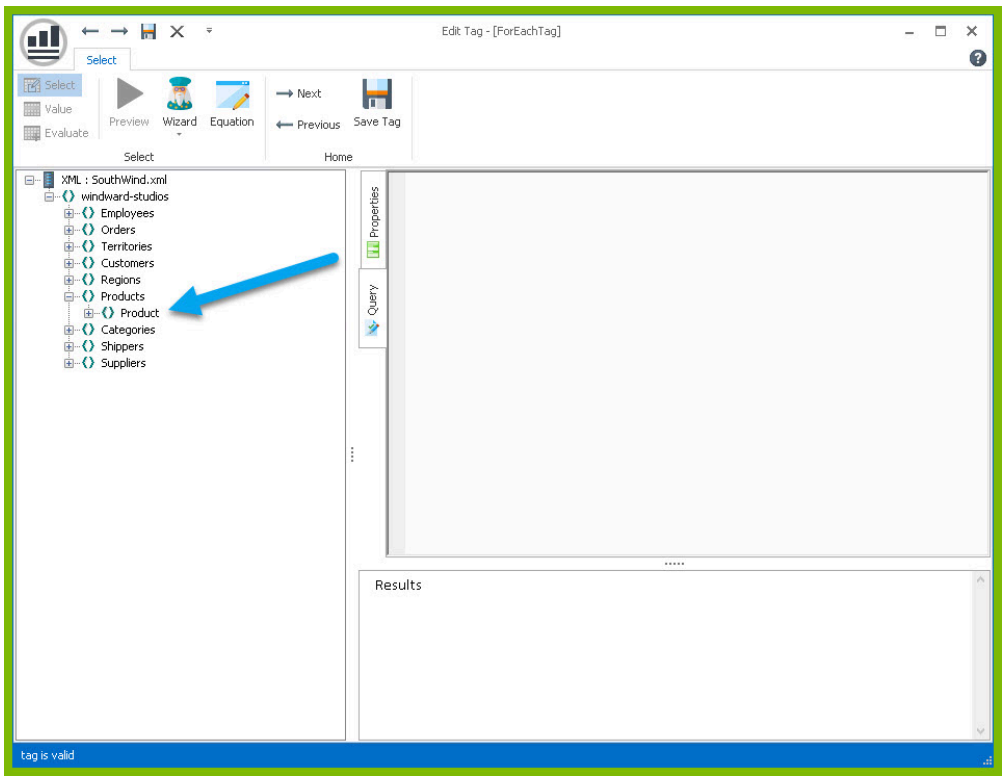


Now all of the content that you place between the ForEach and EndForEach tags will be generated once for each record returned by the ForEach tag's select.

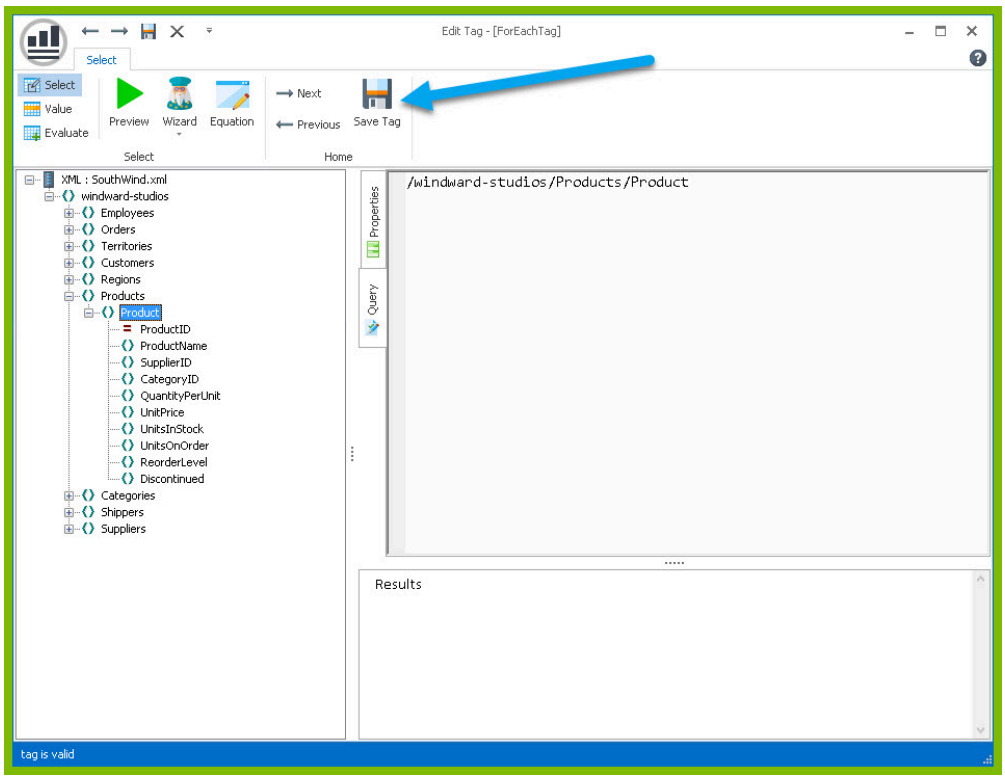
3. For the ForEach tag, you will select the Product table so that you can output information on each product. You can use the Tag Editor to easily create a query for your tag. Place your cursor on the **"[forEach:]"** tag that was inserted in your template and click the **"Edit Tag"** button in the Windward ribbon to open the Tag Editor.



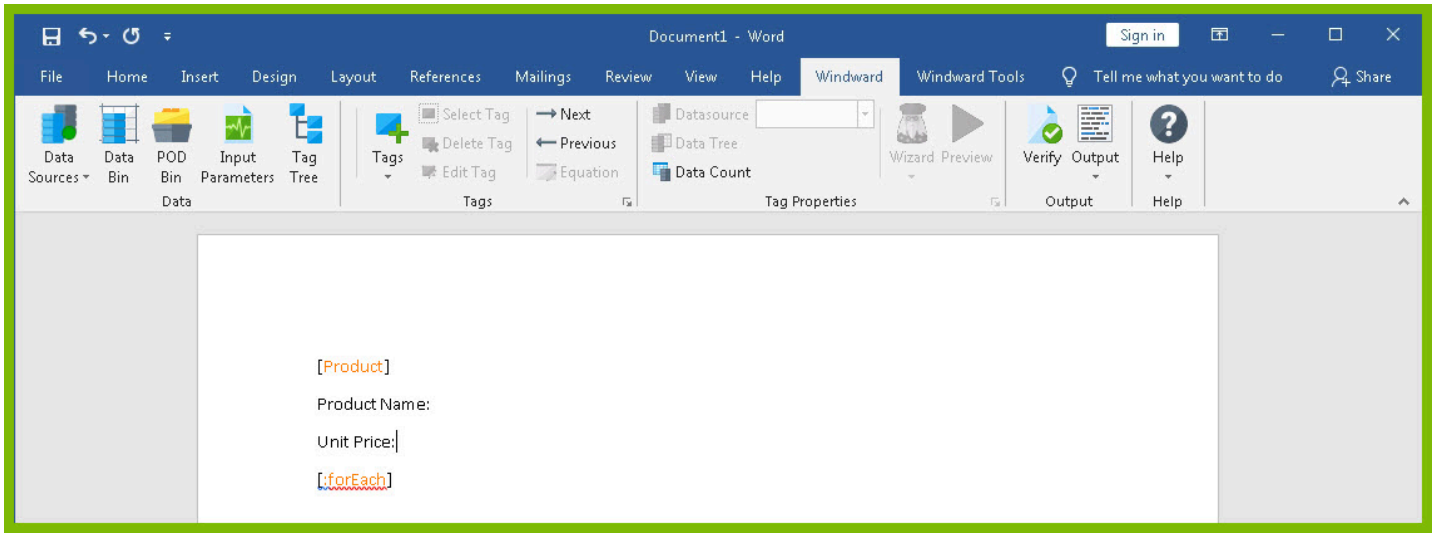
4. In the Tag Tree, expand the node XML: SouthWind.xml -> windward-studios -> Product and double-click the **"Products"**node. This will automatically write a select for the Products node.



5. Click the "**Save Tag**" button. Congratulations! You have just inserted your first tag into your template!



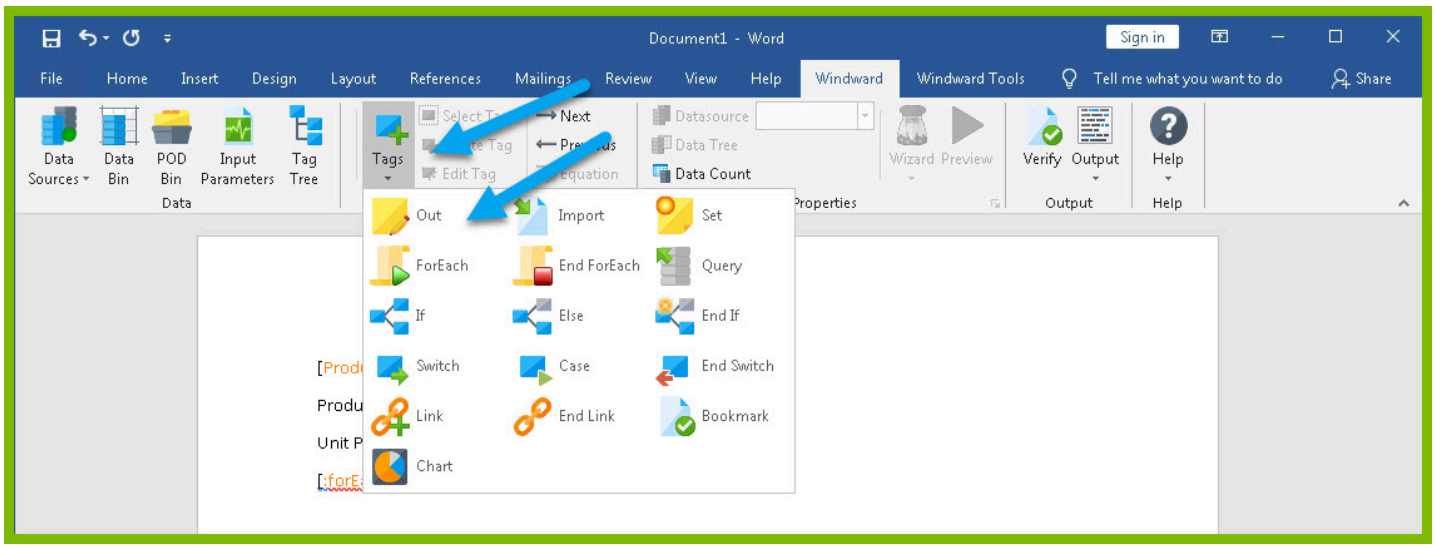
6. On a new line after the ForEach tag, enter the text “Product Name:” and on the next line “Unit Price:”



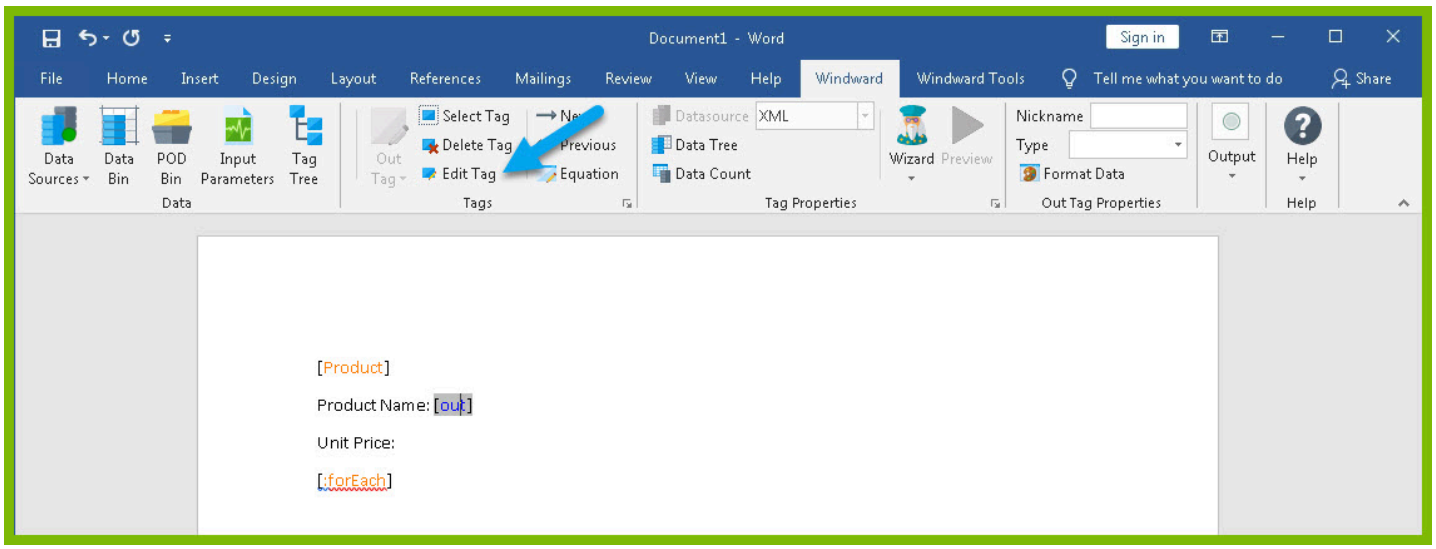
The “Product Name” and “Unit Price” text will be output for every product returned by your ForEach tag’s select.

Out tags will be used to insert data into your final report. These tags will output the Product Name and Unit Price for each product after these labels.

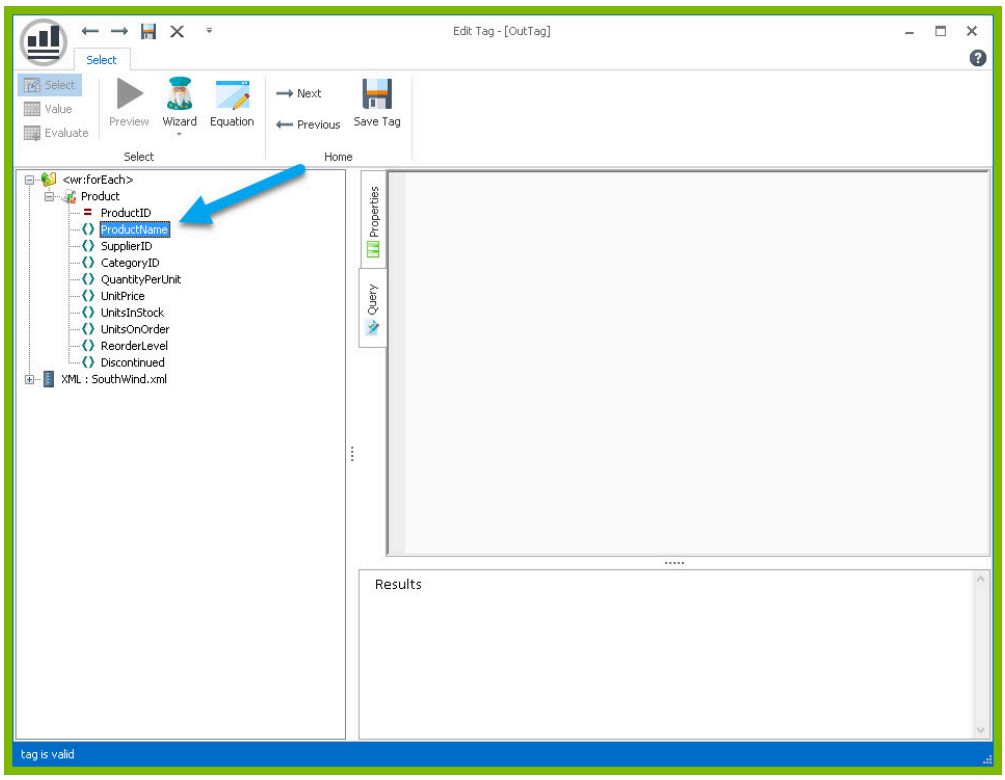
7. Place your cursor after the “Product Name:” text, and click “**Tags**” in the Windward ribbon and click “**Out**.” This places an Out tag at the location of the cursor.



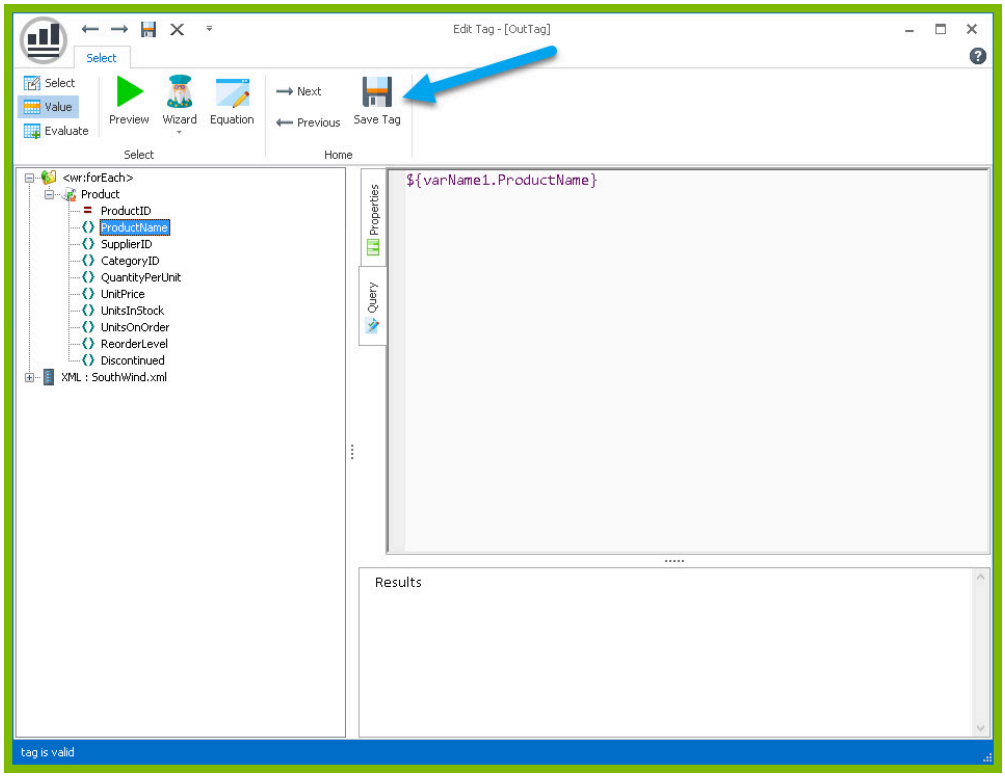
8. Open the tag Editor by placing your cursor on the Out tag and clicking "**Edit Tag**."



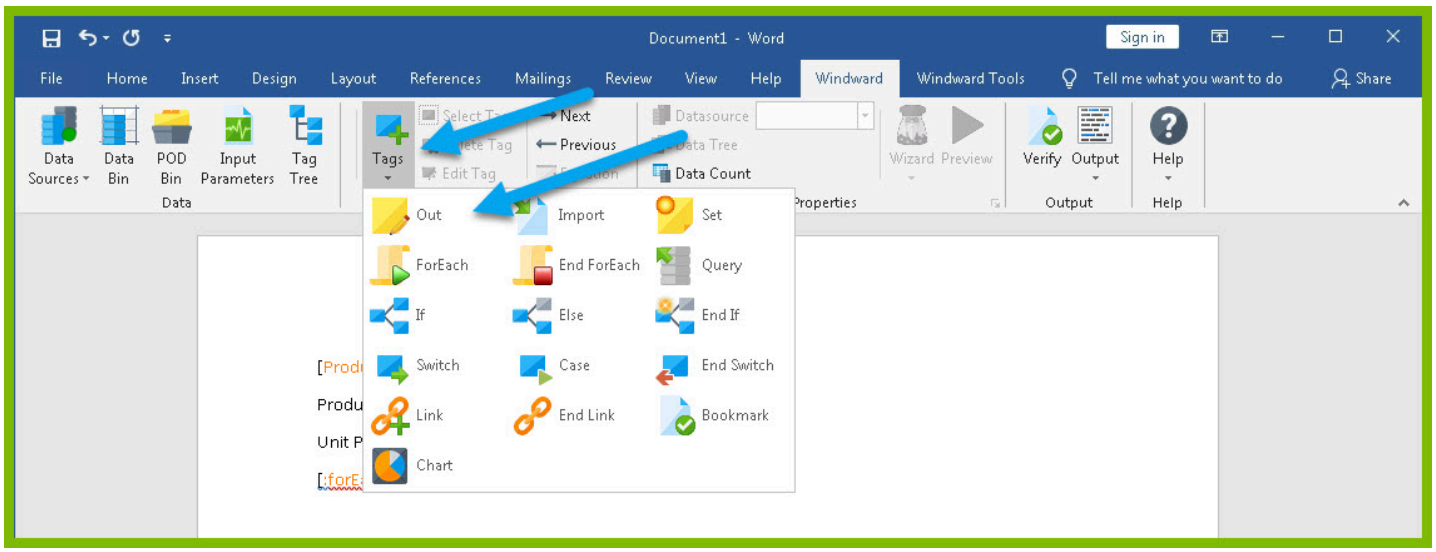
9. You can now see your ForEach variable in the tag editor since the Out tag occurs in the template between the ForEach tag and the EndForEach tag. In the Tag Tree, expand <wr:forEach> -> Product and double-click **"ProductName."** This automatically queries the ProductName currently held by the ForEach variable.



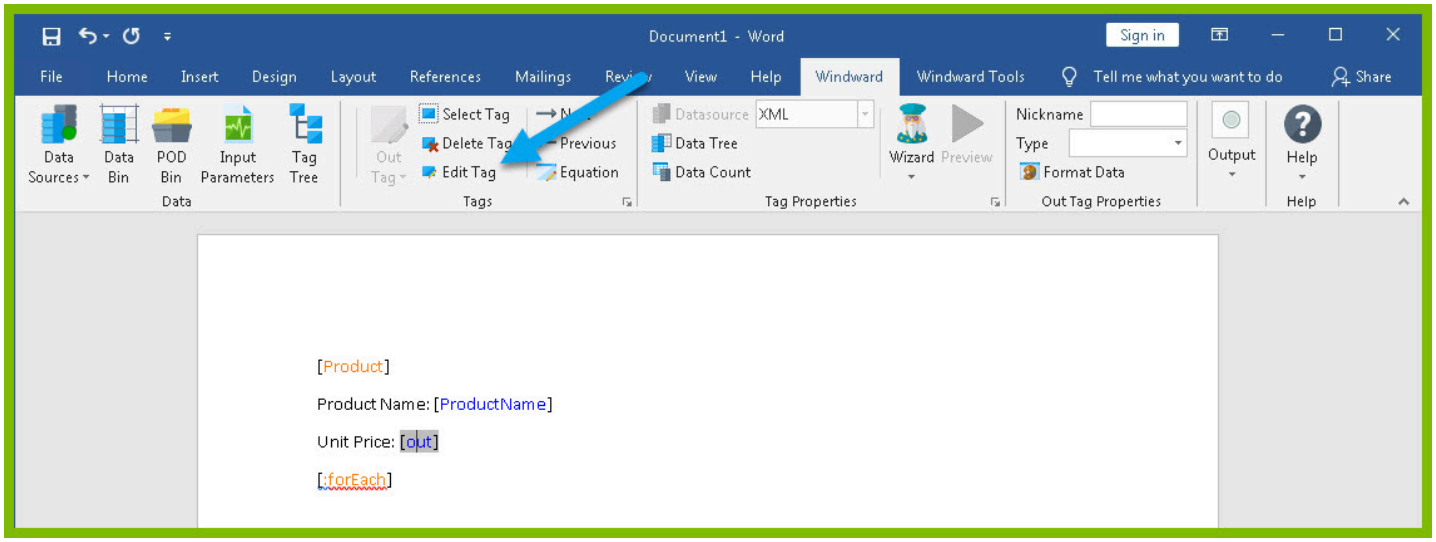
10. Click "**Save Tag**" button to save your tag's query.



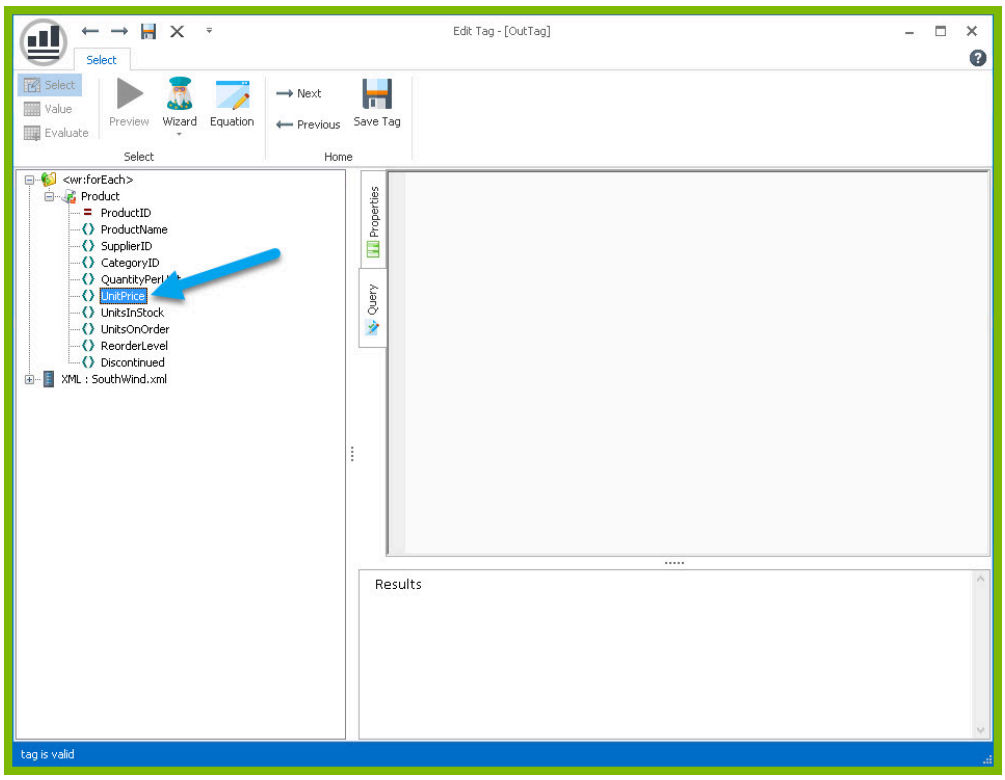
11. Place your cursor after the "Unit Price:" text, and click "**Tags**" in the Windward ribbon and click "**Out**." This places an out tag at the location of the cursor.



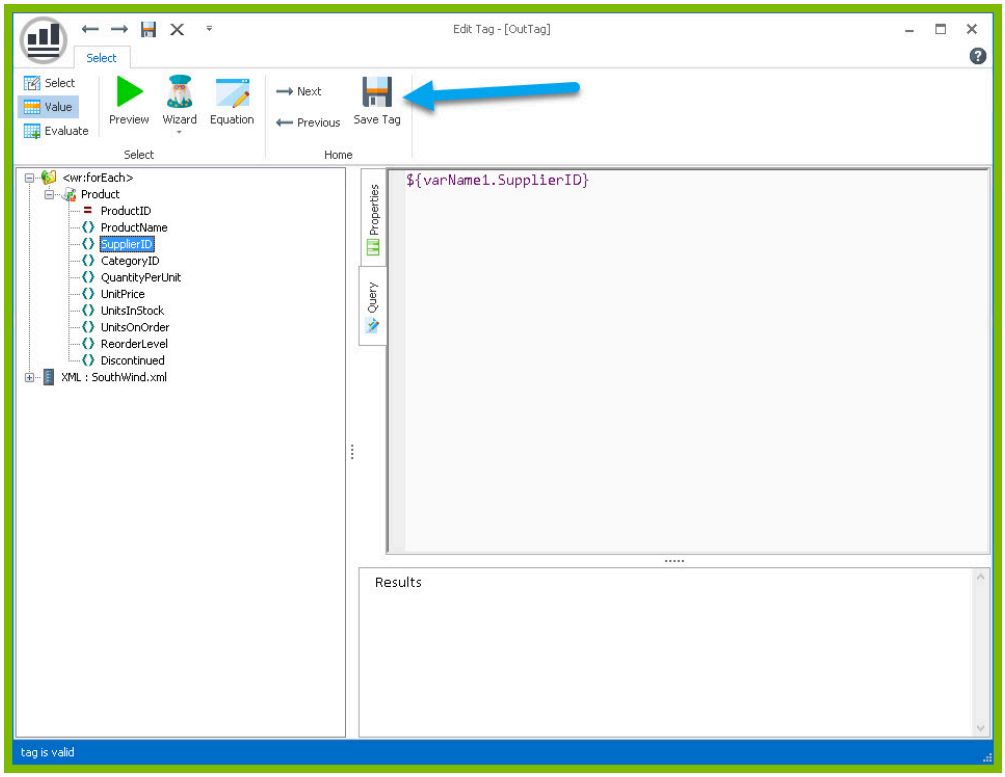
12. Open the tag Editor by placing your cursor on the Out tag and clicking "**Edit Tag**."



13. You can now see your ForEach variable in the tag editor since the Out tag occurs in the template between the ForEach tag and the EndForEach tag. Expand <wr:forEach> -> Product and double click **"UnitPrice."** This automatically queries the UnitPrice currently held by the ForEach tag.

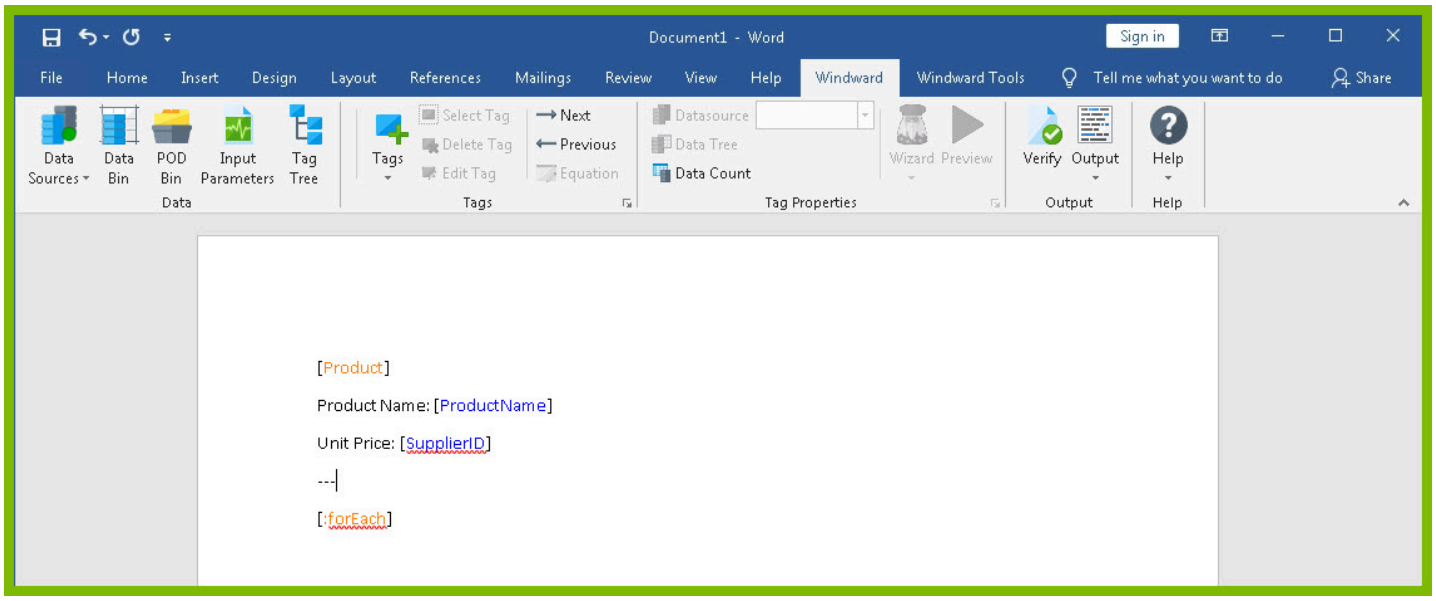


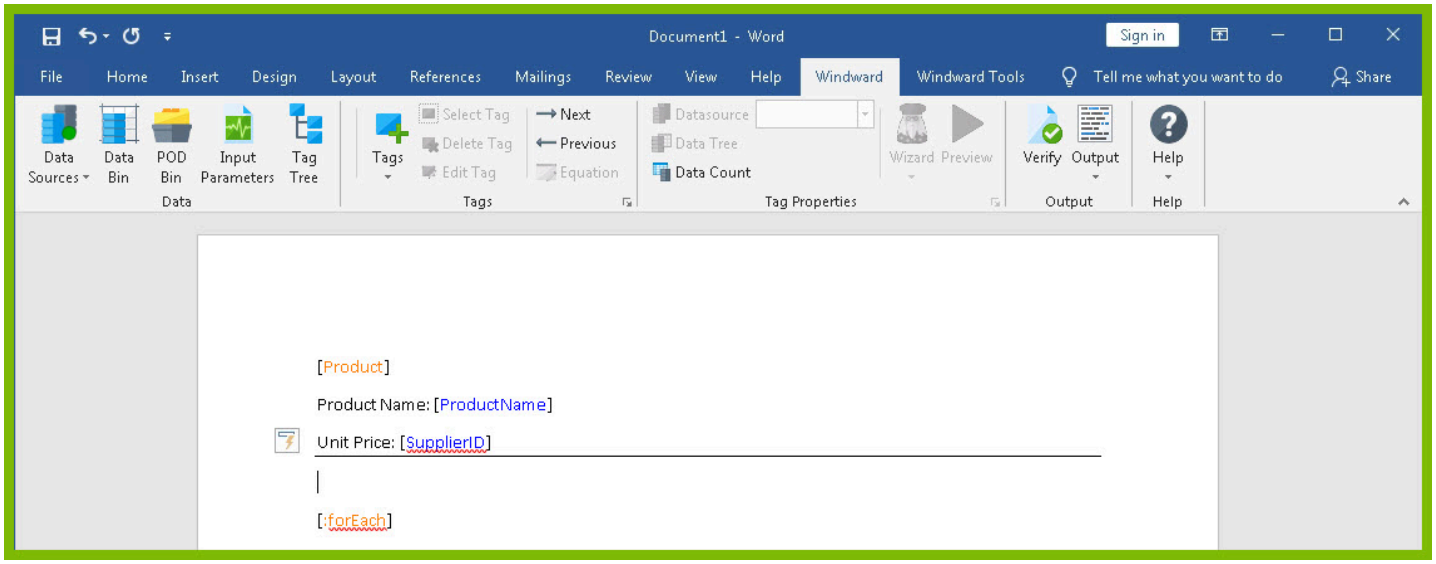
14. Click the **"Save Tag"** button to save your tag's query.



15. Finally, you are going to add some indicator between each product so you can easily distinguish between them in your output. Indent to a new line after the line starting with "UnitPrice:"

16. Add a horizontal line by typing “---” and pressing **Enter**. This will create a line across the document followed by an indentation.

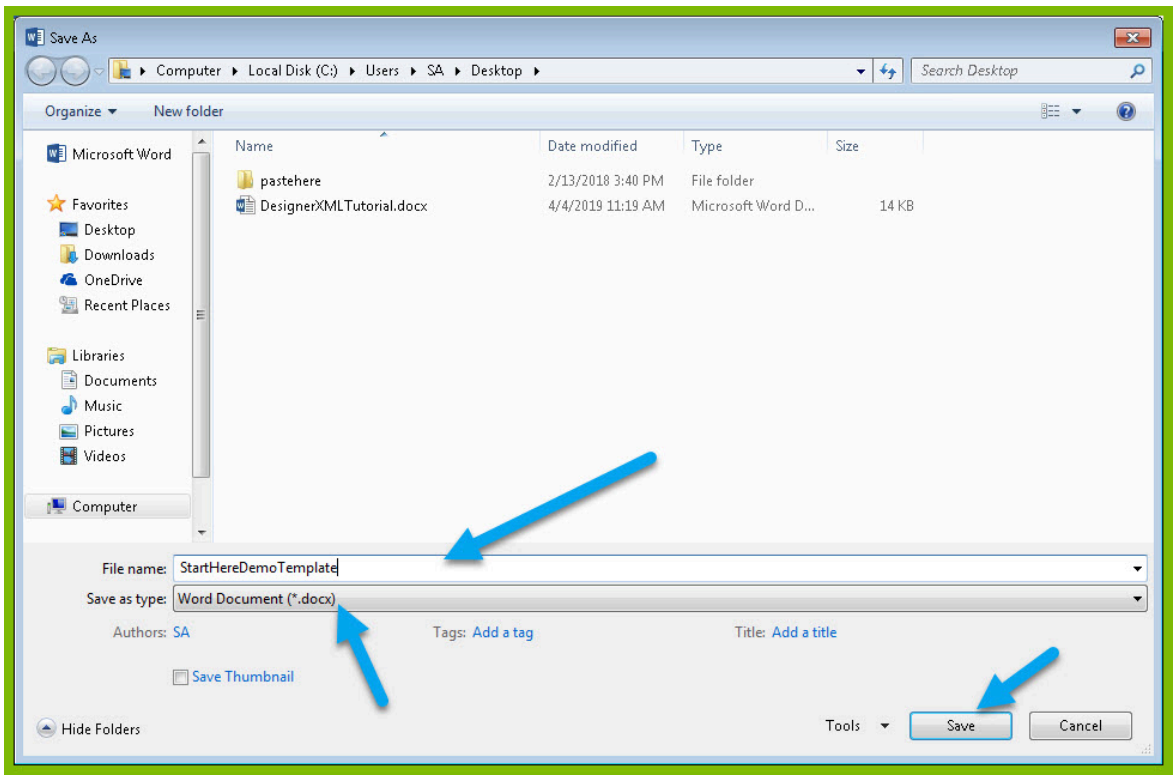




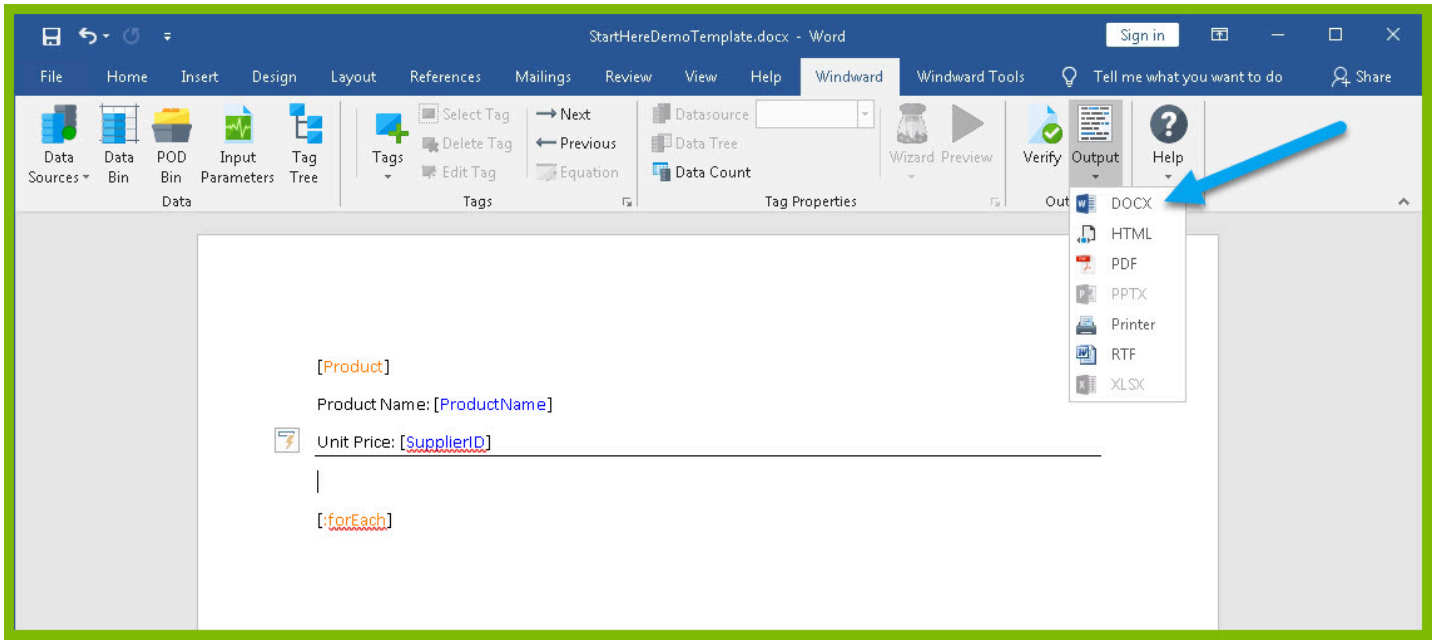
Now you are all finished with your template design!

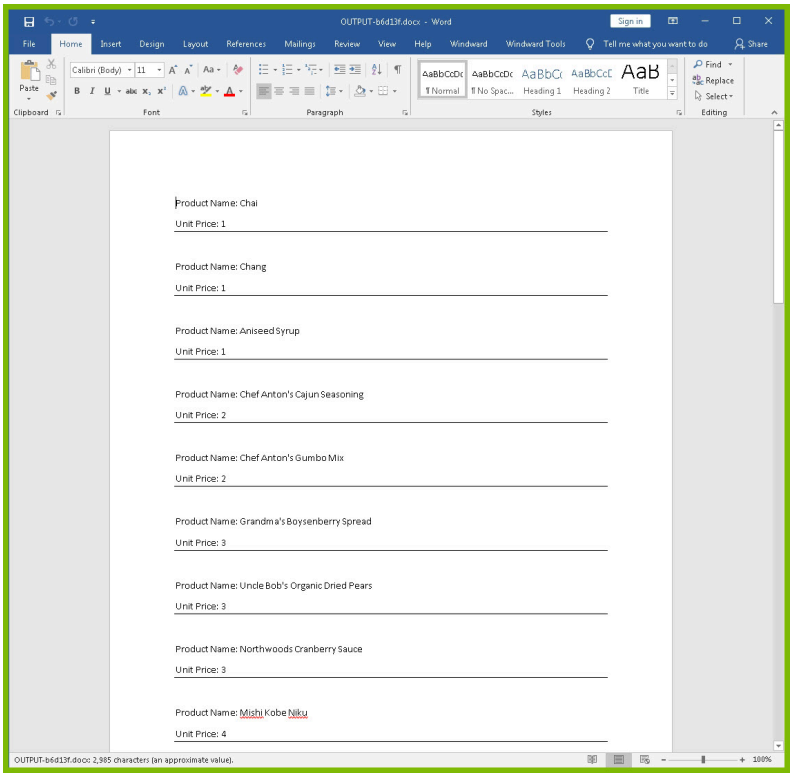
Step 4 - Output

1. Save your template. You can save your template to anywhere you want on your machine and give it any name you want. Be sure to save it as a “.docx” document.



2. In the “Windward” tab, click the “**Output**” button and from the drop down select “**DOCX**.”





Your template will output, and you should see a list of product names and their unit price with each product separated by a line.

Congratulations! You have created your first template in Windward Designer and produced your first output!

Next Steps

Now that you have finished this introduction tutorial, here are some resources we recommend you visit next:

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2. How to use the XPath Wizard
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Creating a Template in Word with Salesforce Data

Training Guide

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The Four Steps to Windward:

1. Install
2. Connect to data
3. Design your template & insert your data
4. Output

Step 1 - Install

To get started, you need to install the Designer. If you have it already installed, please skip this step!

If you already have a license key, please visit the downloads page to install the software.

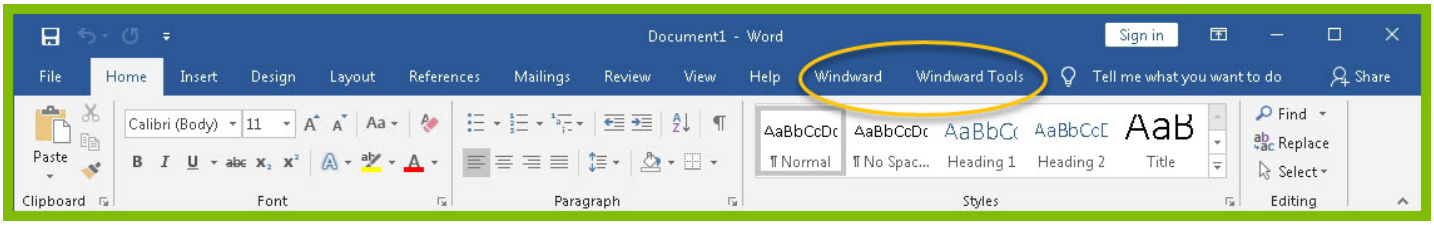
Or start a free 14-day trial!

Step 2 - Connect To Data

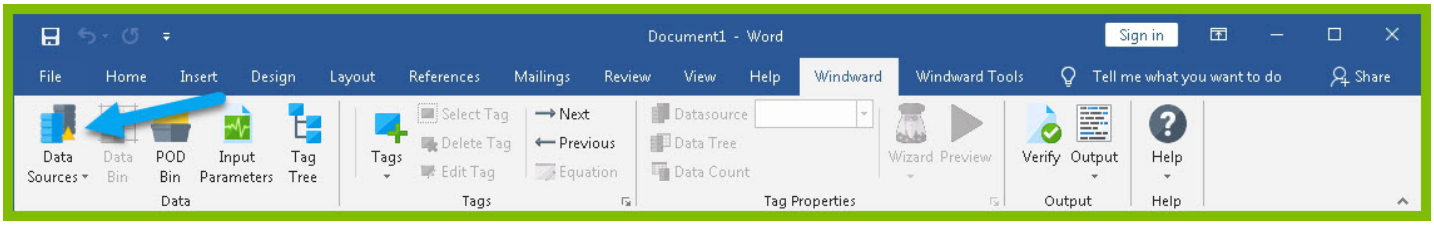
We do not offer sample data from Salesforce, so for this tutorial you will need to connect to your Salesforce data source using your credentials.

To connect to the data:

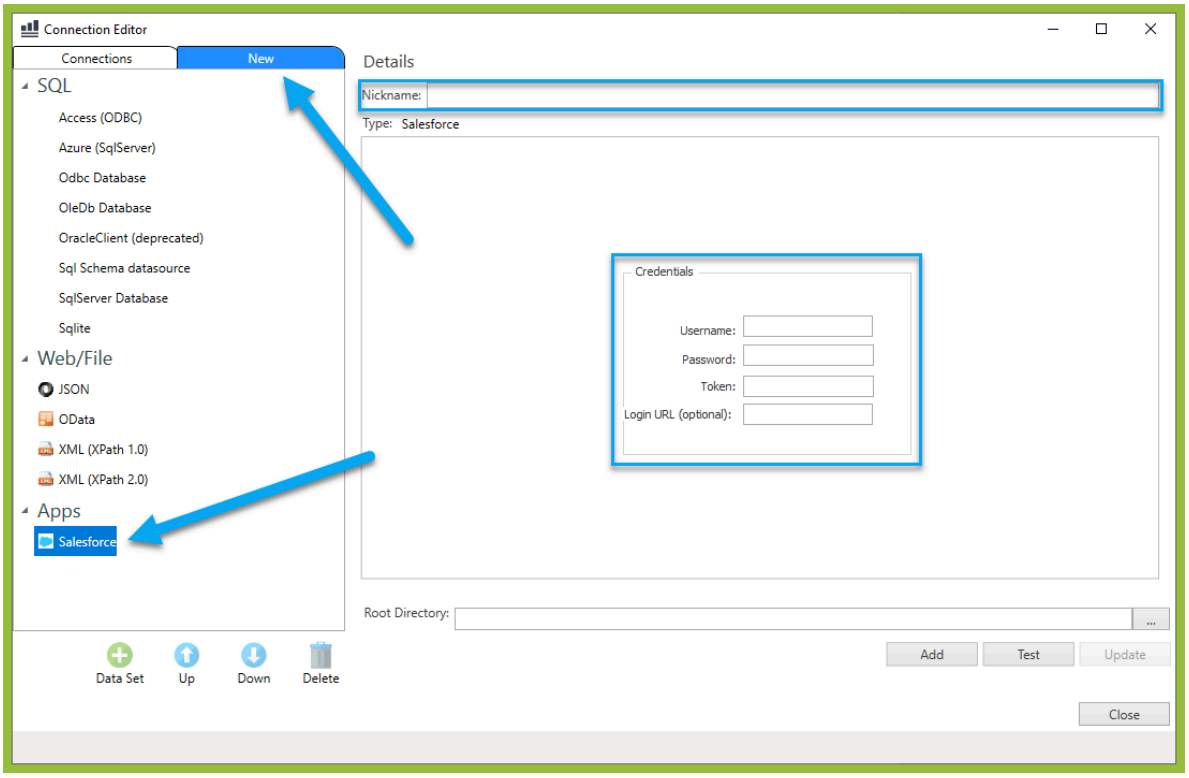
1. Open Microsoft Word. Now that you've installed Windward Designer, you will see two new tabs in the Microsoft Office Ribbon – the "**Windward**" Tab and the "**Windward Tools**" Tab.



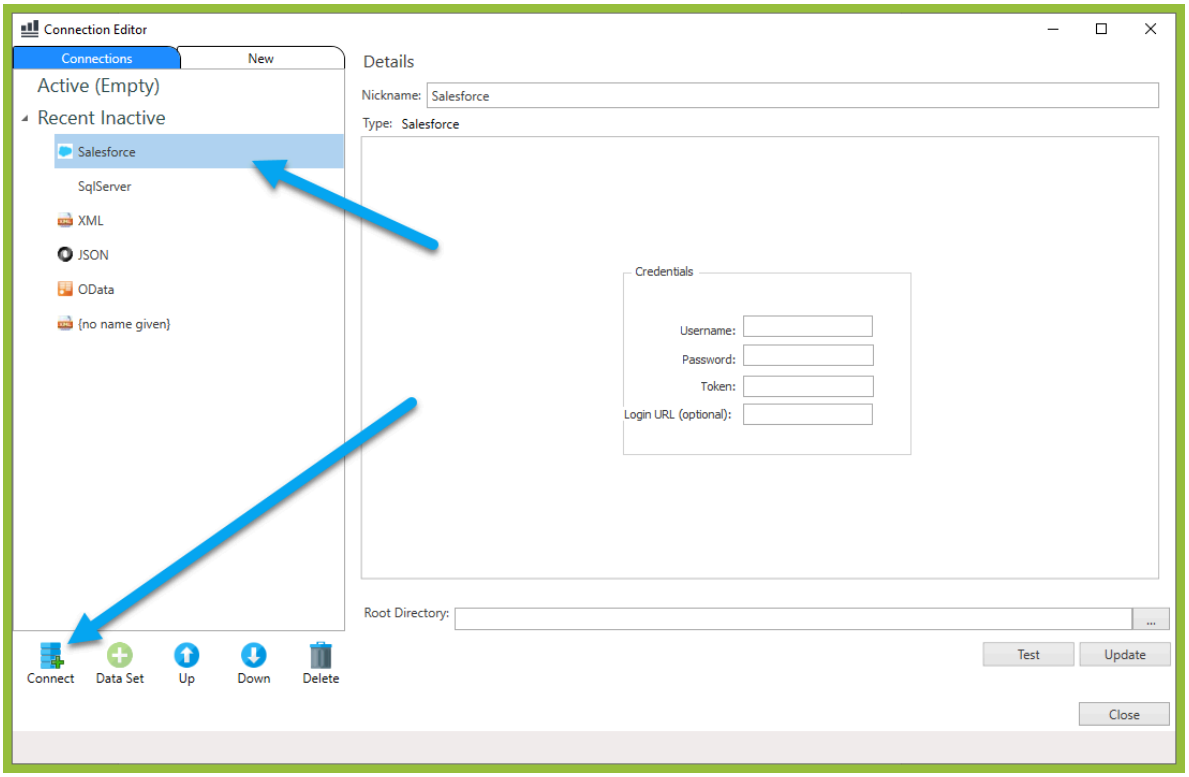
2. Click on the **"Windward Tab"** and click on the **"Data Sources"** button located on the left-hand side of the ribbon. This opens the Connection Editor where you will manage all of your data connections. (Alternatively, you can click on the lower half of the button to expand the drop down and then click **"Data Sources."**)



3. Go to the "**New**" tab, and then scroll down to the apps section and click on "**Salesforce**". Using your **username, password, and token**, connect to the Salesforce data source. Assign your connection a "**Nickname**" to easily identify it.



3. In the Connection Editor tab, select the Salesforce connection, and click the "



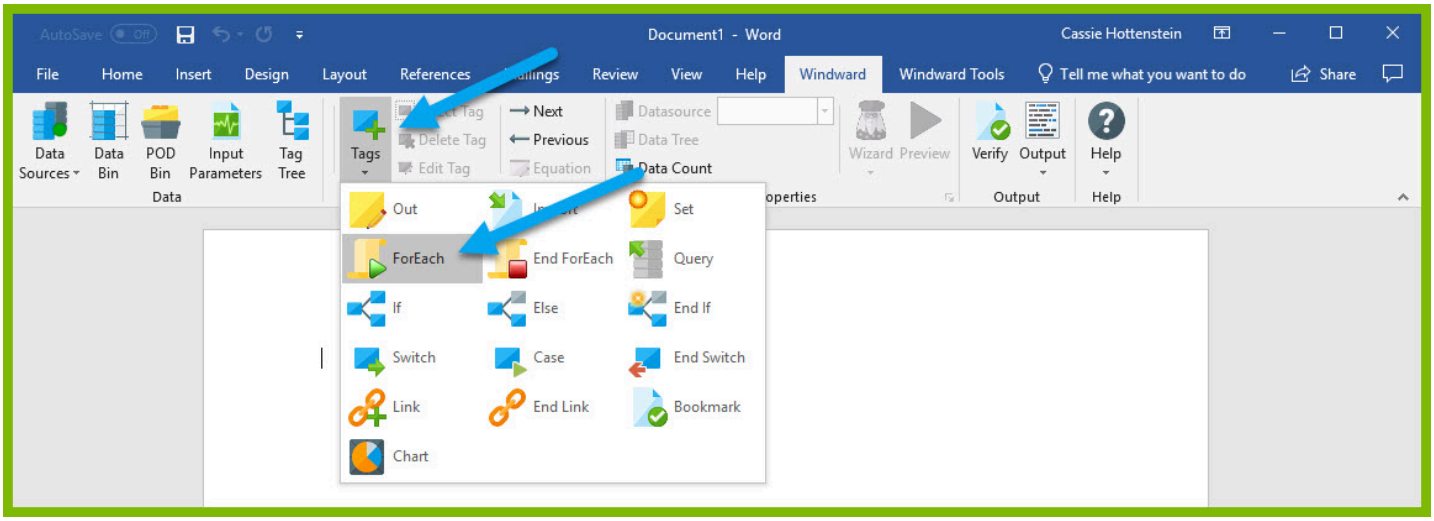
4. Close the Connection Editor by clicking **“Close.”** You have now successfully connected to the sample data!

Step 3 - Design Your Template & Insert Your Data

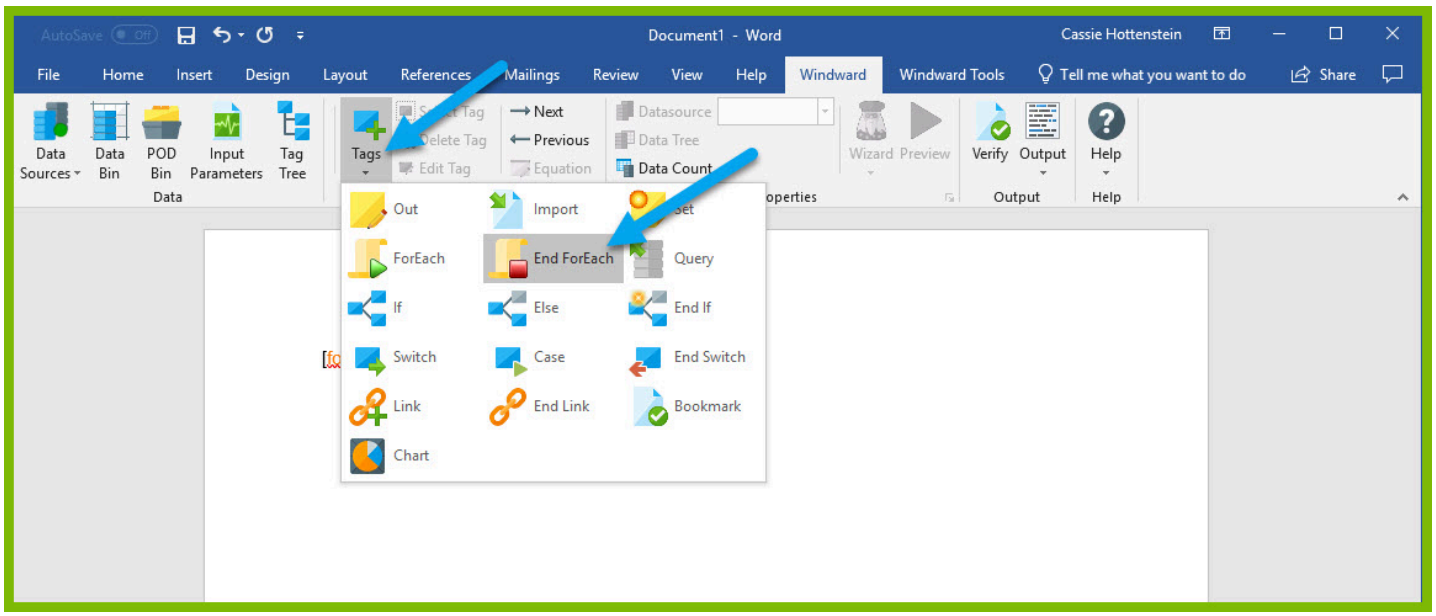
In this training guide, you will build a very basic template to get the feel of Windward Designer. While your final product may not seem very impressive, you will learn the basic skills to making any template! You will make a template which will output the product name and unit price for every product in the sample data, with each product separated by a line.

In situations where you want to output many records returned from a select, you can use a ForEach tag. The ForEach tag will generate output once for each record returned by its select. The ForEach tag itself will not insert data into the template, but rather stores data in a variable that can be used by other tags to generate output.

1. To place a ForEach tag, expand the drop down under the button "**Tags**" in the Windward ribbon and click "**ForEach**."

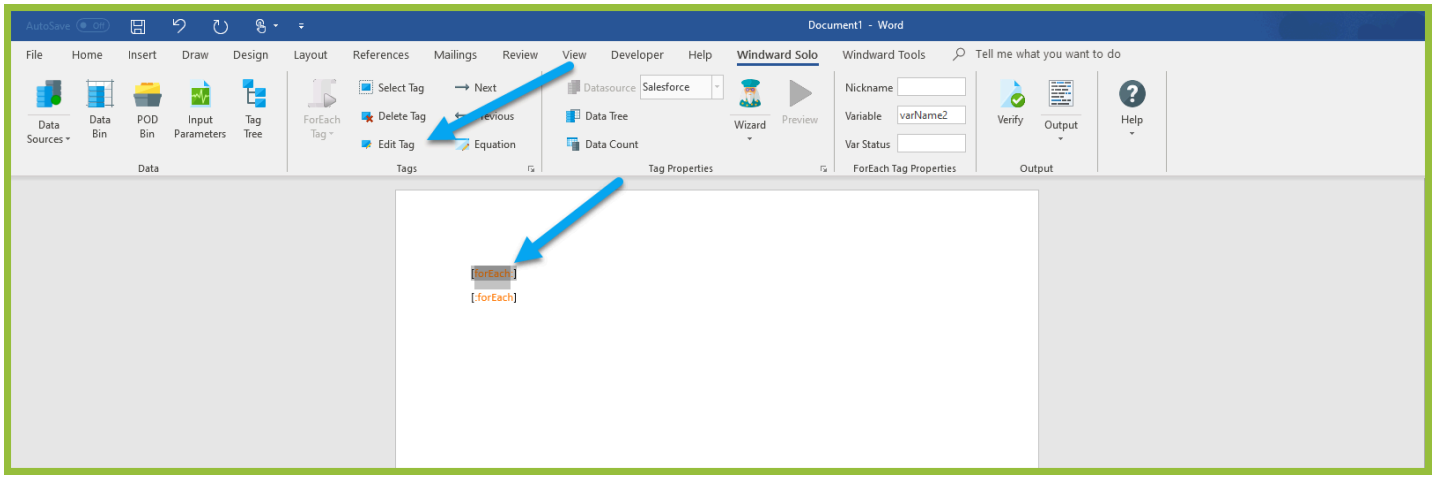


2. Click enter to move to a new line, expand the drop down under the button "**Tags**" in the Windward ribbon, and click "**EndForEach**" to place a closing tag for the ForEach tag.

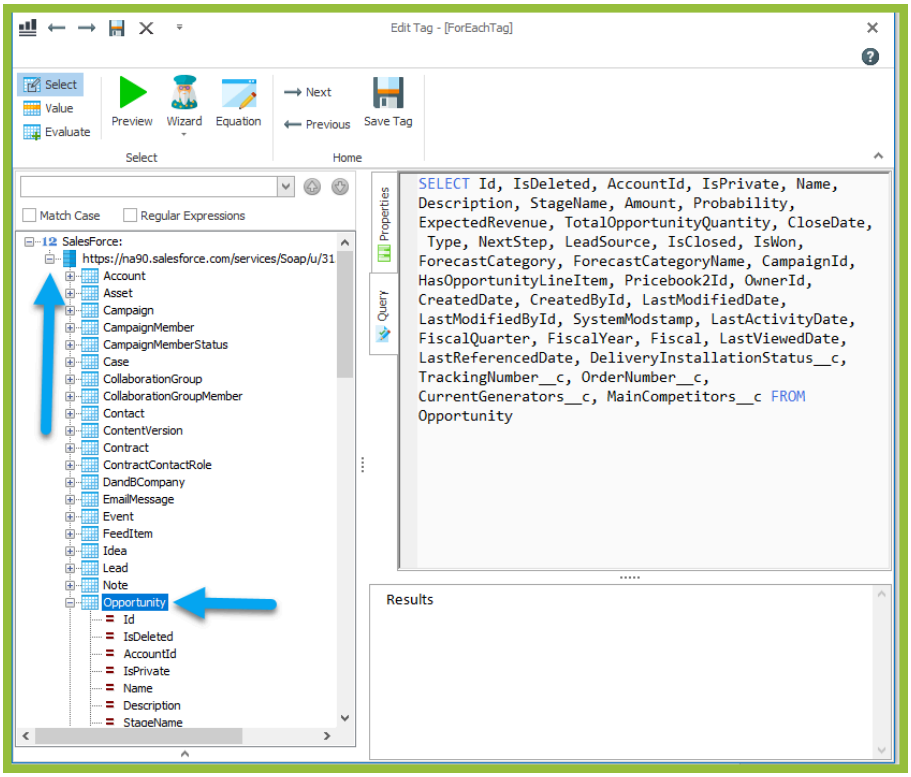


Now all of the content that you place between the ForEach and EndForEach tags will be generated once for each record returned by the ForEach tag's select.

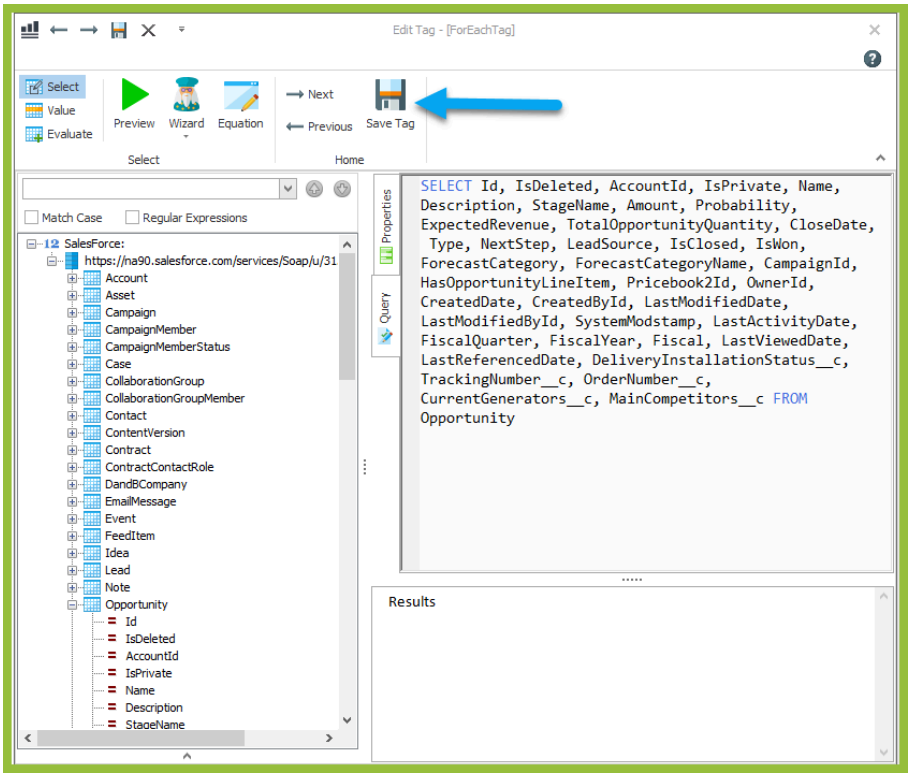
3. For the ForEach tag, you will select the Product table so that you can output information on each product. You can use the Tag Editor to easily create a query for your tag. Place your cursor on the **"[forEach:]"** tag that was inserted in your template and click the **"Edit Tag"** button in the Windward ribbon to open the Tag Editor.



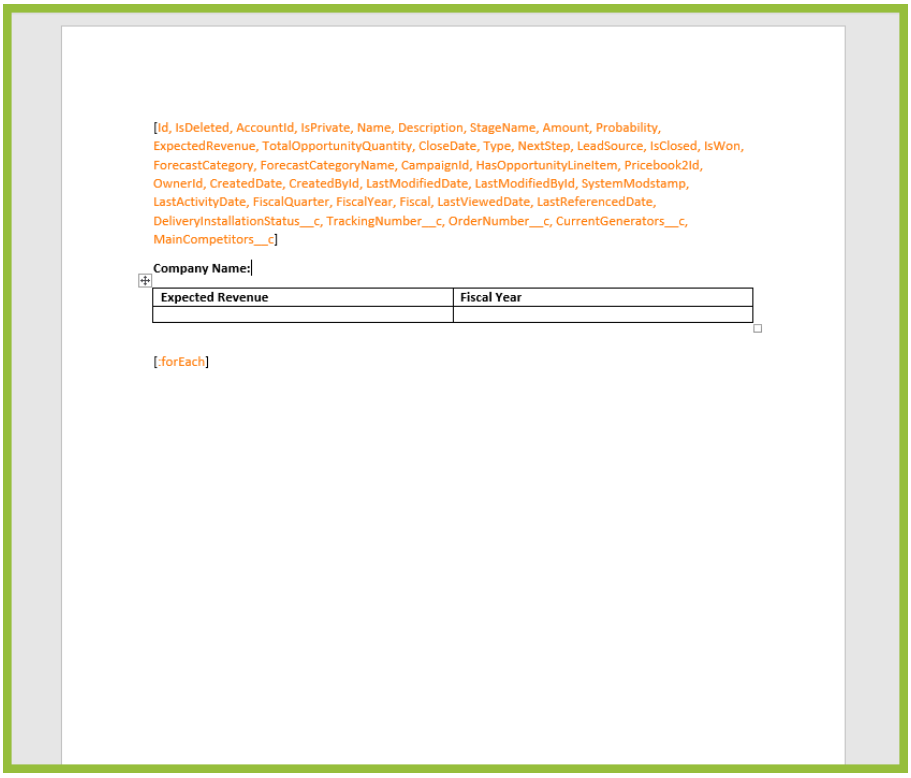
4. In the Tag Tree, expand the table **Salesforce** and double-click the **"Opportunity"** table. This will automatically write a select for the Account table.



5. Click the "**Save Tag**" button. Congratulations! You have just inserted your first tag into your template!



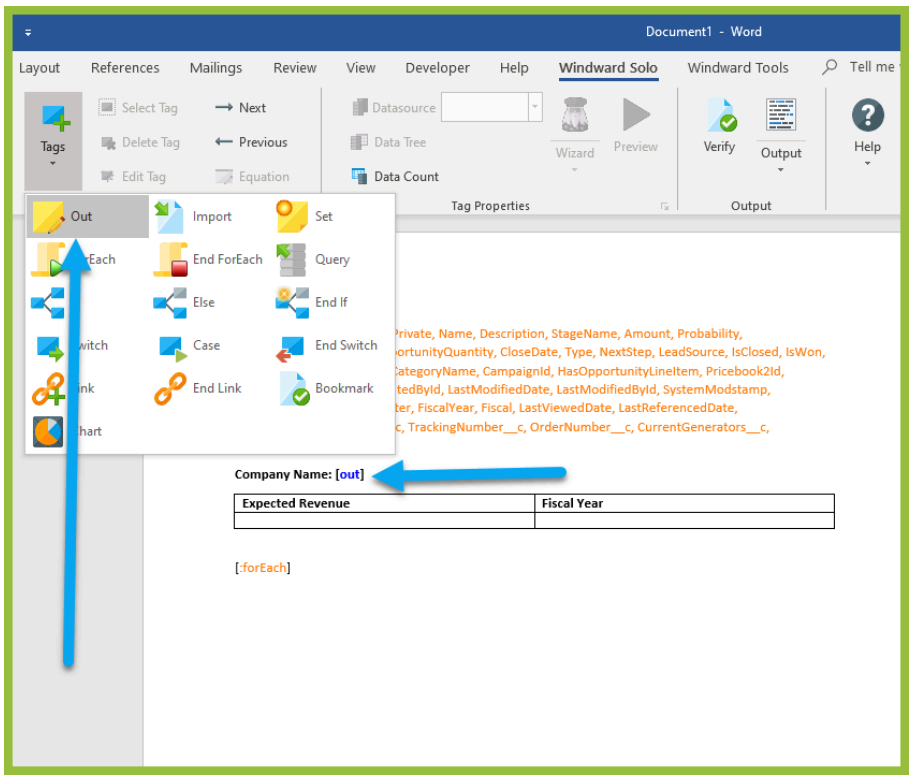
6. On a new line after the ForEach tag, enter the text "Company Name:" and on the next line , create a 2x2 table, and label the first column "Expected Revenue", and the second column "Fiscal Year":



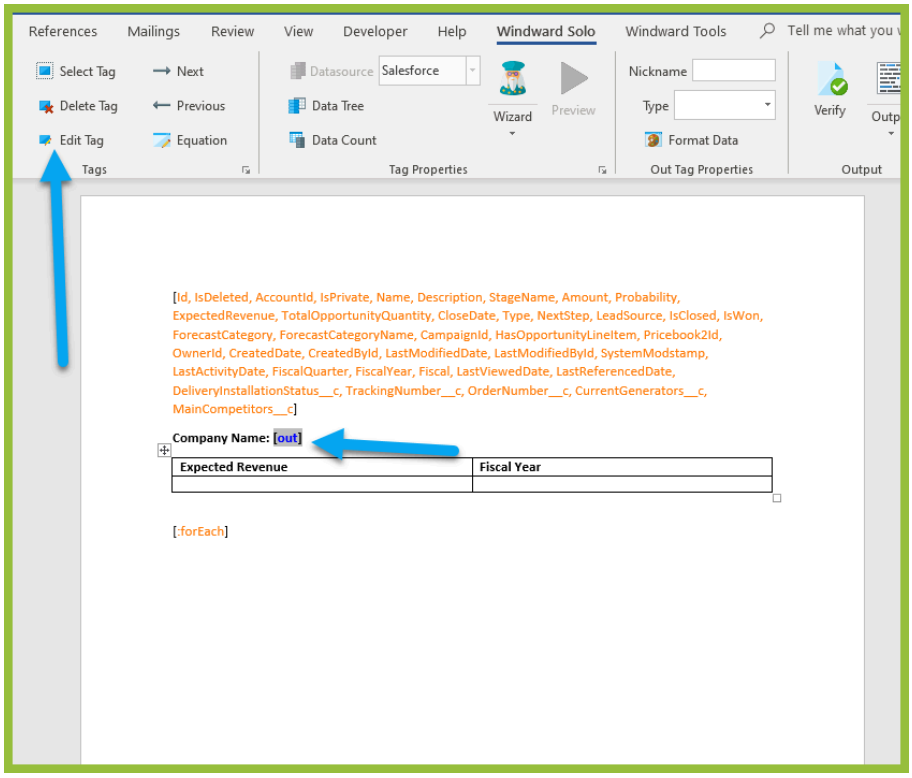
The “Company Name”, "Expected Revenue" and “Fiscal Year” text will be output for every product returned by your ForEach tag’s select.

Out tags will be used to insert data into your final report. These tags will output the Product Name and Unit Price for each product after these labels.

7. Place your cursor after the “Name:” text, and click “**Tags**” in the Windward ribbon and click “**Out**.” This places an Out tag at the location of the cursor.

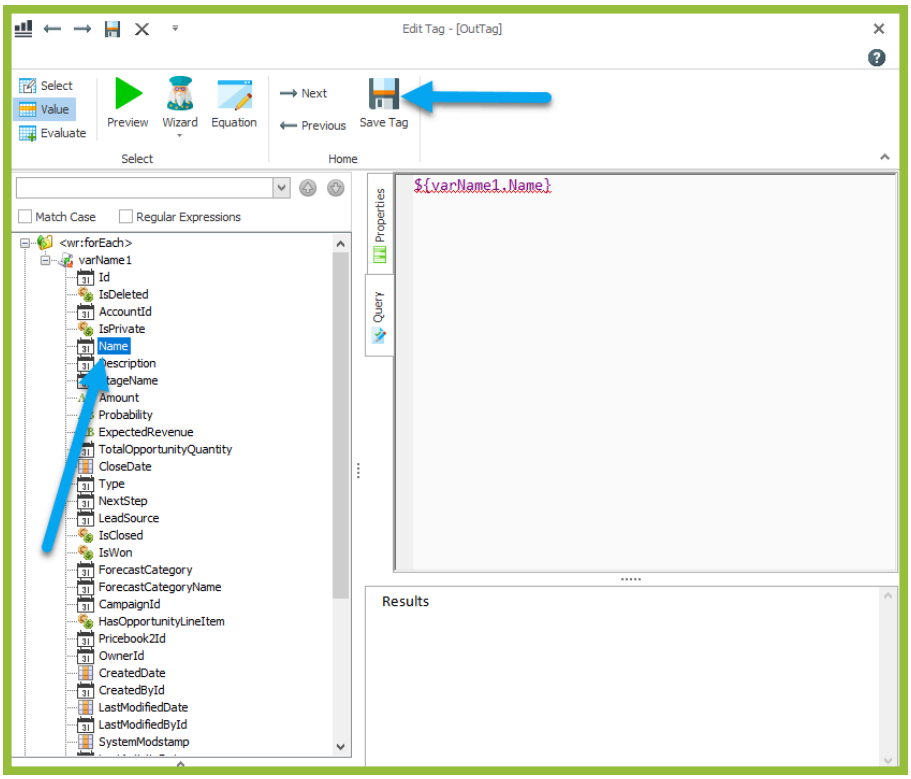


8. Open the tag Editor by placing your cursor on the Out tag and clicking "**Edit Tag**." Alternatively, you can double click on the tag you wish to edit:

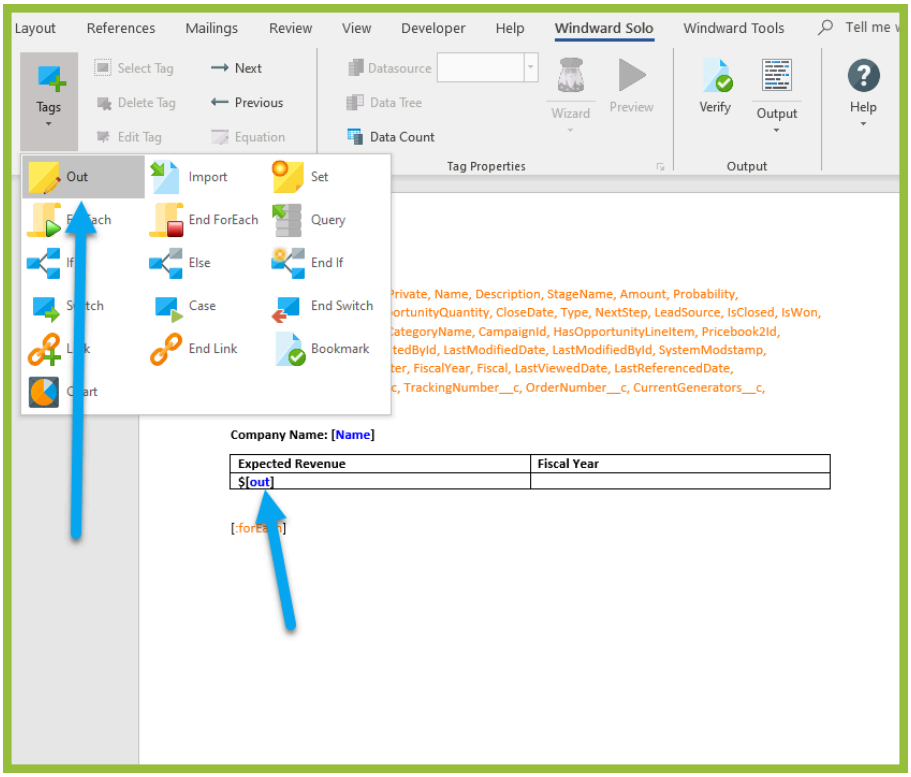


9. You can now see your ForEach variable in the tag editor since the Out tag occurs in the template between the ForEach tag and the EndForEach tag. In the Tag Tree, expand

<wr:forEach> -> varName1 and double-click **“Name.”** This automatically queries the Name currently held by the ForEach variable. Then click "**Save Tag**"



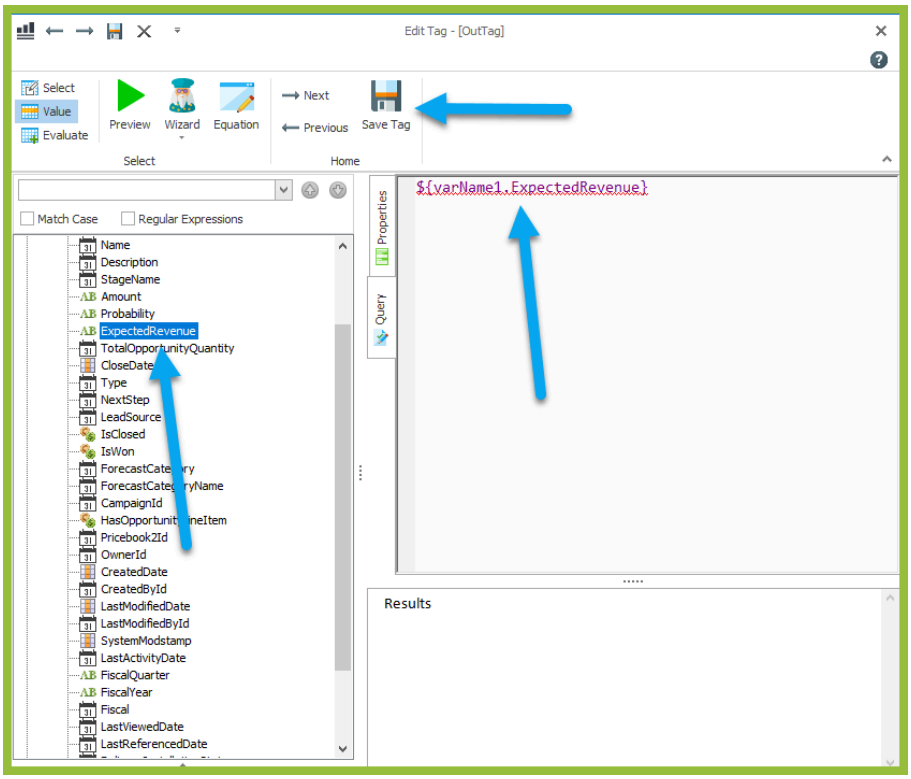
10. Place your cursor after the empty cell under the "Expected Revenue" column. First add a '$', and then click “**Tags**” in the Windward ribbon and click “**Out**.” This places an out tag at the location of the cursor.



11. Open the tag Editor by placing your cursor on the Out tag and clicking "**Edit Tag**."

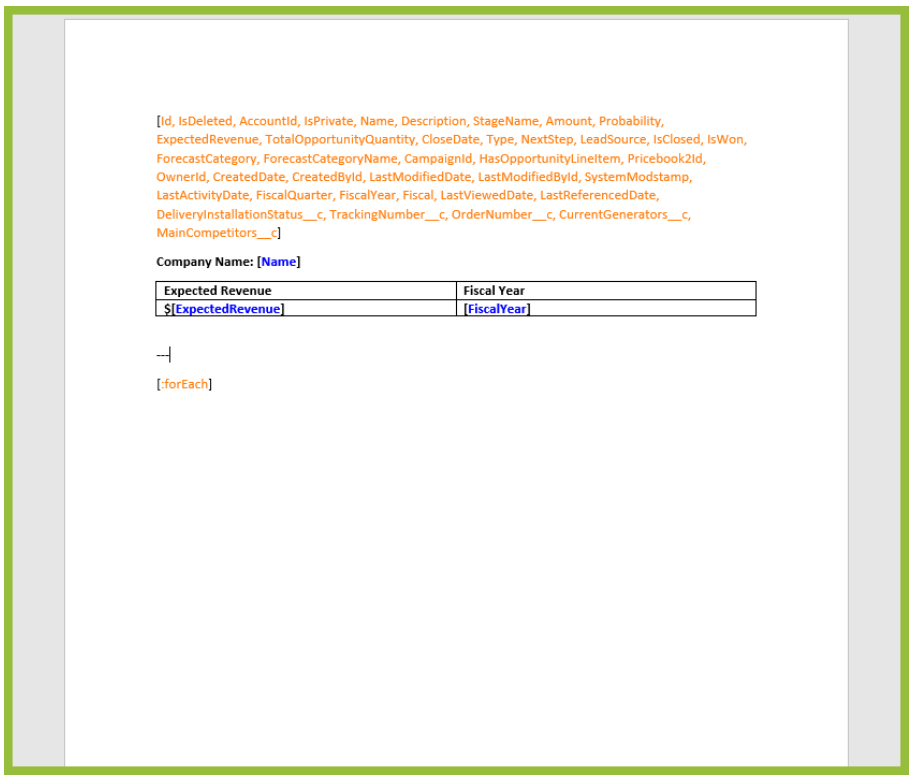
12. You can now see your ForEach variable in the tag editor since the Out tag occurs in the template between the ForEach tag and the EndForEach tag. Expand <wr:forEach> -> varName1 and double click **Expected Revenue**. This automatically queries the expected revenue currently held by the ForEach tag.

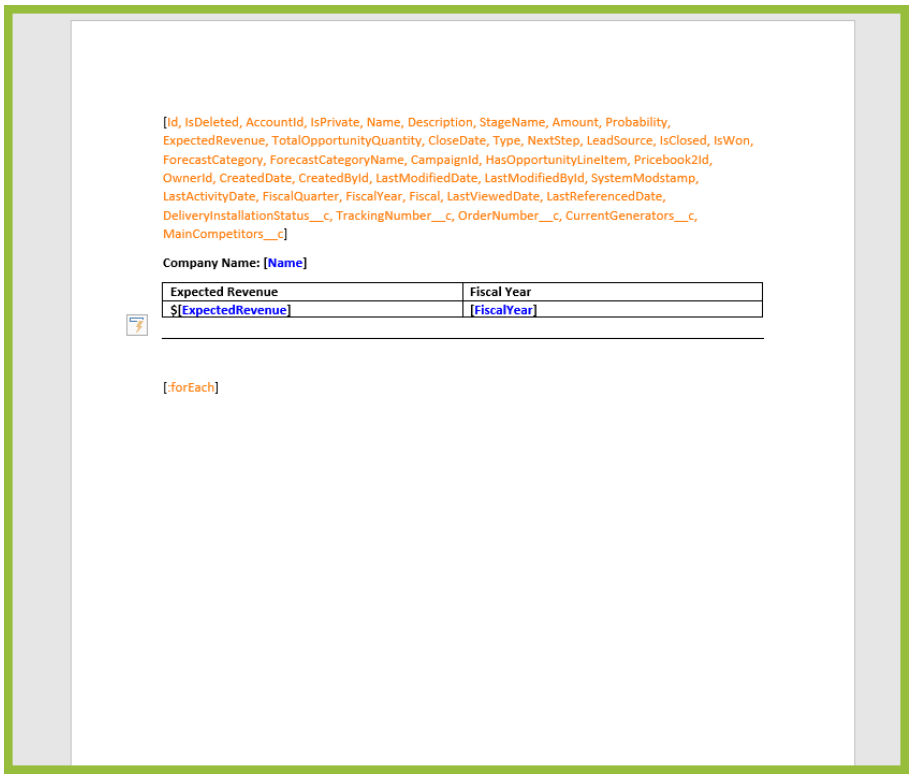
Then click **Save Tag.**



13. Now do the same for the Fiscal Year column. Add an out tag, edit the tag so that it prints the fiscal year, and save the tag:

14,Before the **[:forEach]** tag, type "---", and then hit enter. This will generate a line break between each output:

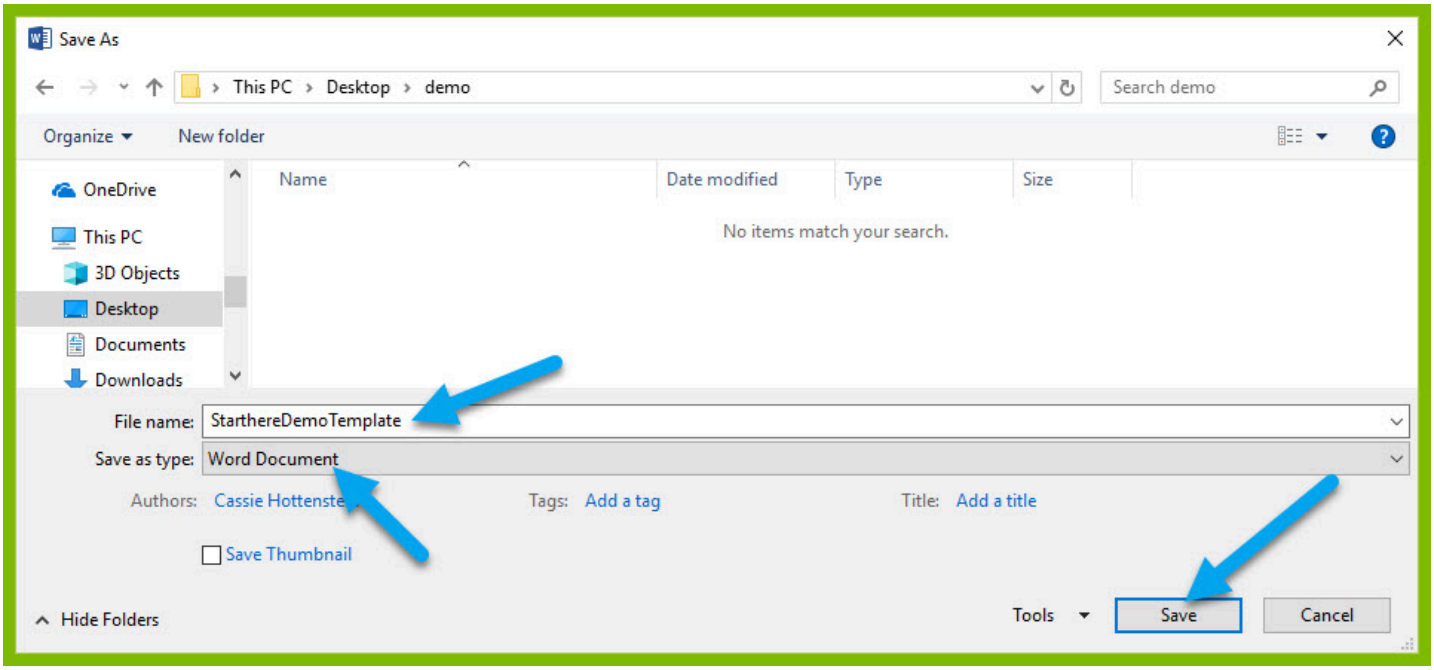




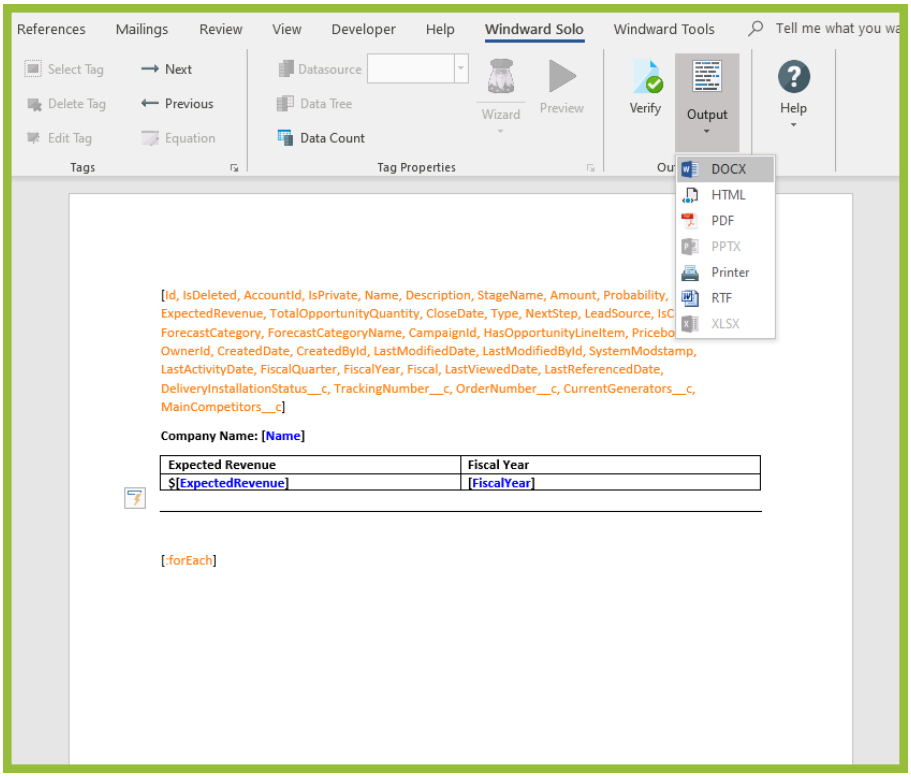
Now you are all finished with your template design!

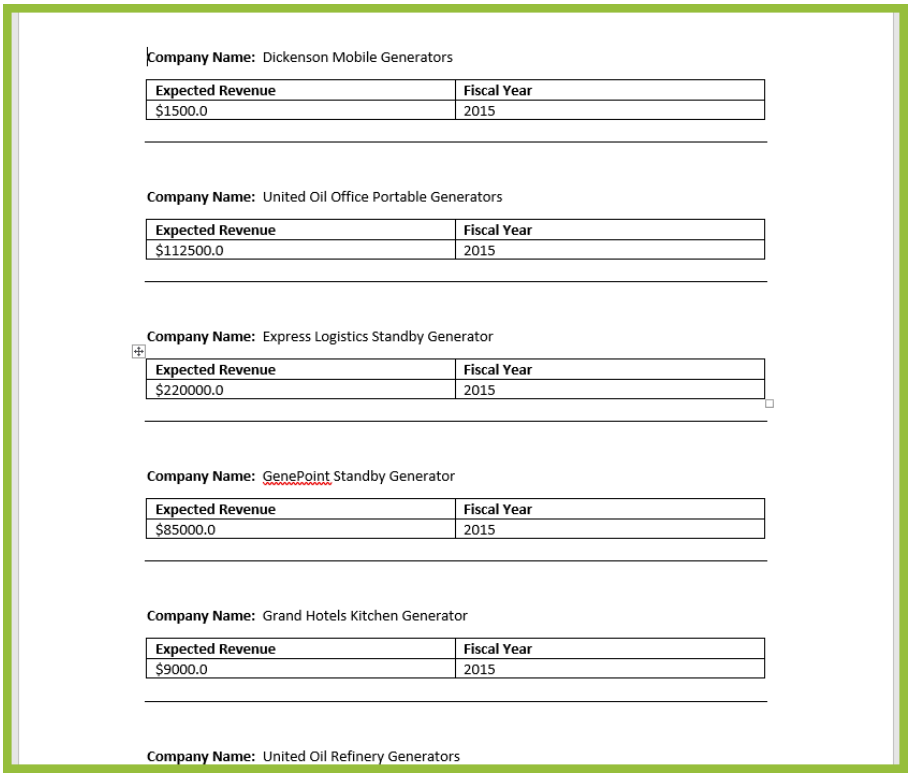
Step 4 - Output

1. Save your template. You can save your template to anywhere you want on your machine and give it any name you want. Be sure to save it as a ".docx" document.



2. In the "Windward" tab, click the "**Output**" button and from the drop down select "**DOCX**."





Company Name: Dickenson Mobile Generators

Expected Revenue	Fiscal Year
$1500.0	2015

Company Name: United Oil Office Portable Generators

Expected Revenue	Fiscal Year
$112500.0	2015

Company Name: Express Logistics Standby Generator

Expected Revenue	Fiscal Year
$220000.0	2015

Company Name: GenePoint Standby Generator

Expected Revenue	Fiscal Year
$85000.0	2015

Company Name: Grand Hotels Kitchen Generator

Expected Revenue	Fiscal Year
$9000.0	2015

Company Name: United Oil Refinery Generators

Your template will output, and you should see a list of Account names and their ID with each account separated by a line.

Congratulations! You have created your first template in Windward Designer and produced your first output!

Next Steps

Now that you have finished this introduction tutorial, here are some resources we recommend you visit next:

1. How to connect to SQL datasources
2. How to use the XPath Wizard
3. The Windward Tutor: A collection of short video tutorials
4. Creating an Invoice in Windward Designer

Created by demo version of Windward - www.windwardstudios.com

This article contains information about the Watermark found in the footer of all output produced by a Windward Trial License Keys.

All output produced will have a footer that reads the following:

"Created by demo version of Windward - www.windwardstudios.com"

Windward Watermarked Output

When you receive a trial license key from Windward that key is coded to create a watermark on all the output produced by that license. Not just the Designer output but Engine output too. The .NET, RESTful, and Java engines will also watermark their output to prevent commercial use of our trial licenses.

Once you become a Windward customer Test licenses will continue to watermark their output but your Designers and Production licenses will no longer watermark or protect their output.

Beginner

1: How to Populate Tables Using a ForEach Tag

Prerequisite Tutorials

Before doing this tutorial, we recommend you have done...

1. The Start Here Tutorial

Training Overview

This Training Guide walks you through how to populate tables with data from a ForEach tag.

Step 1- Connect to Data

ForEach tags in Windward Designer iterate over every record returned by the tags select. It is common for documents to use tables of information taken from the database, and the ForEach tag is the tool to use when you want your automated documents to display tables. ForEach tags can be leveraged to create additional rows of a table for every record, allowing your table to extend for as many rows are required to accommodate the data. Follow the steps bellow to learn how to populate a table using a ForEach tag:

1. Open Microsoft Word. Now that you've installed Windward Designer, you will see two new tabs in the Microsoft Office Ribbon – the "Windward" Tab and the "Windward Tools" Tab.

2. Click on the "**Windward Tab**" and click on the "**Data Sources**" button located on the left-hand side of the ribbon. This opens the Connection Editor where you will manage all of your data connections.

3. In the Connection Editor window, select the data connection labeled "**SqlServer**" under "Recent Inactive" and click the "**Connect**" button.

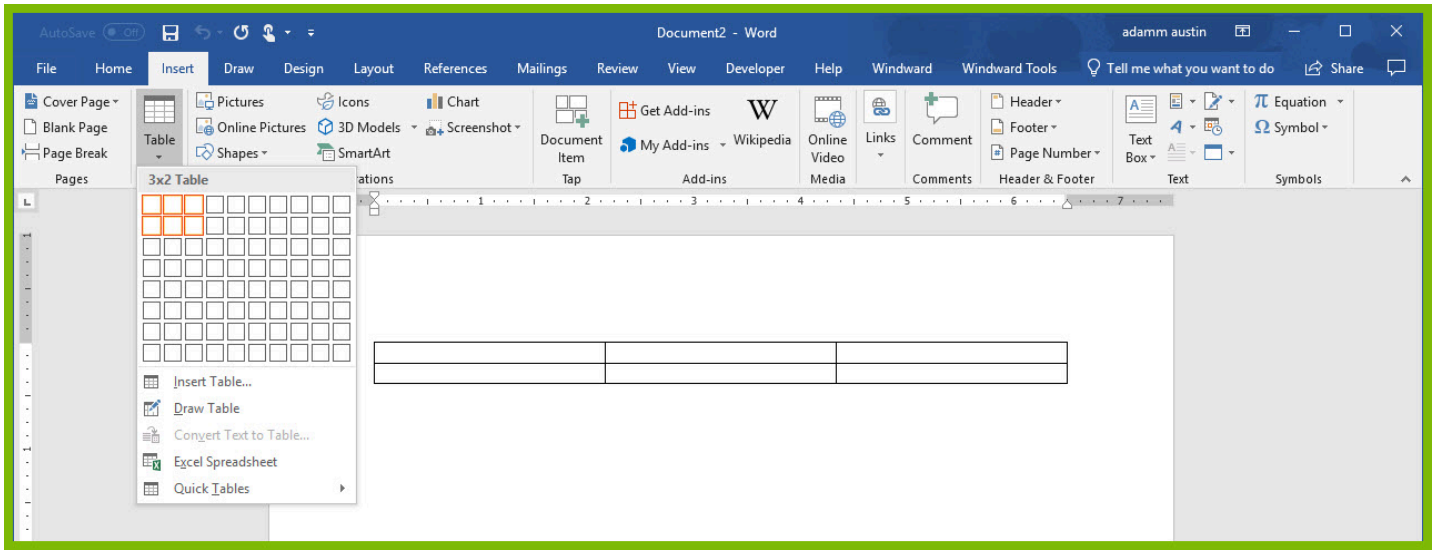
4. Close the Connection Editor by clicking "**Close**." You have now successfully connected to the sample data!

Step 2- Design Table Template

1. Place your cursor on the first line of the template.

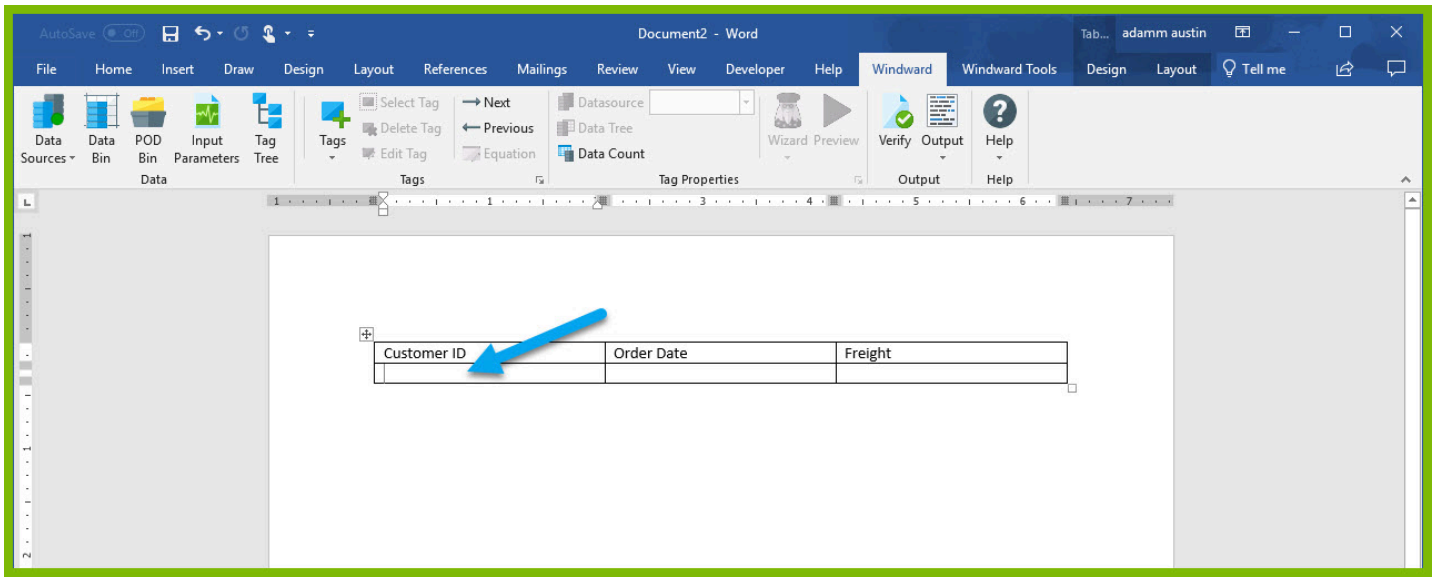
2. Go to the "Insert" ribbon, and click "**Table**"

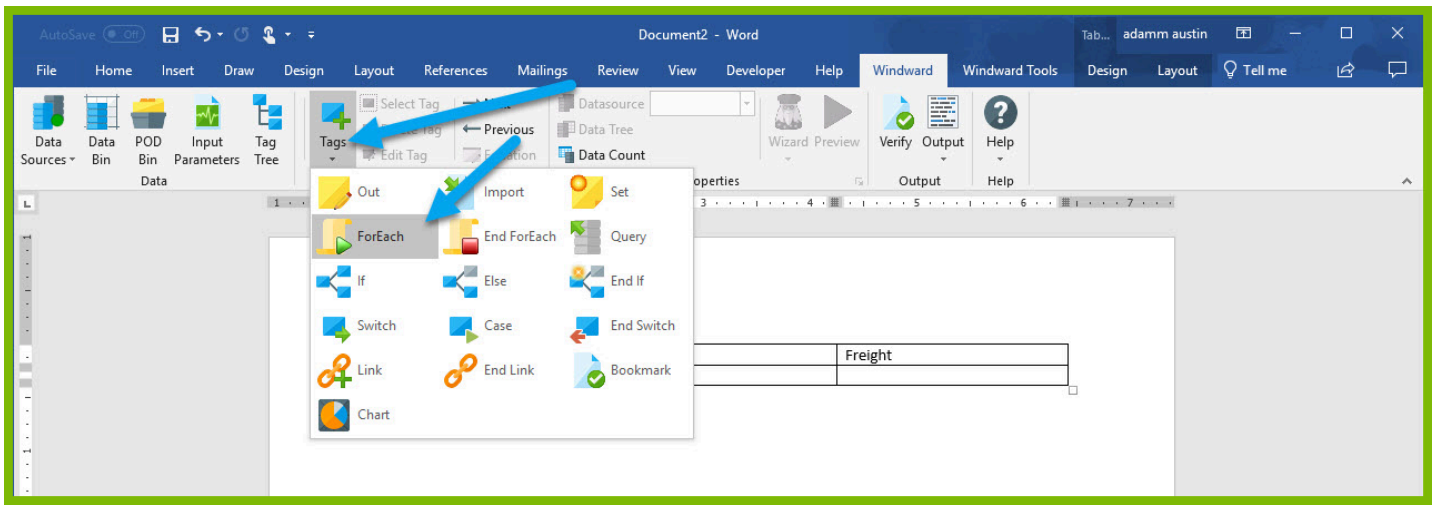
3. In the drop-down, select a 3X2 table to insert.



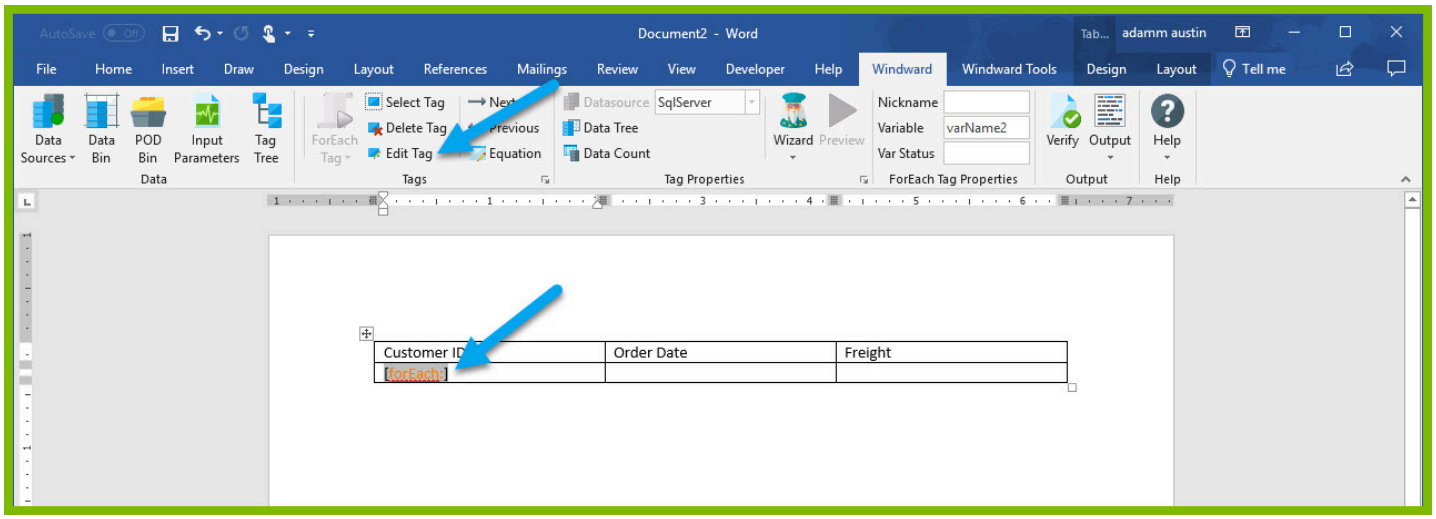
4. Give the columns of your table headers “Customer ID,“ “Order Date,” and “Freight.”:

5. Place your cursor in the cell under “Customer ID,” and insert a ForEach tag.



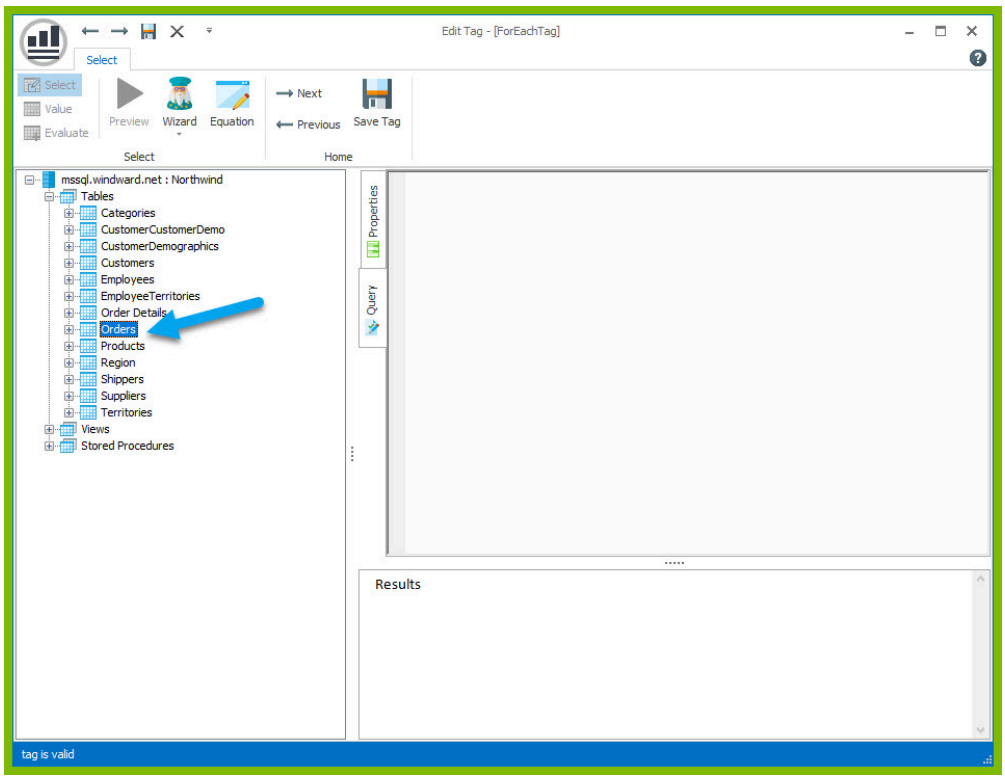


6. Place your cursor on the **"[forEach:]"** tag that was inserted in your template and click the **"Edit Tag"** button in the Windward ribbon to open the Tag Editor.

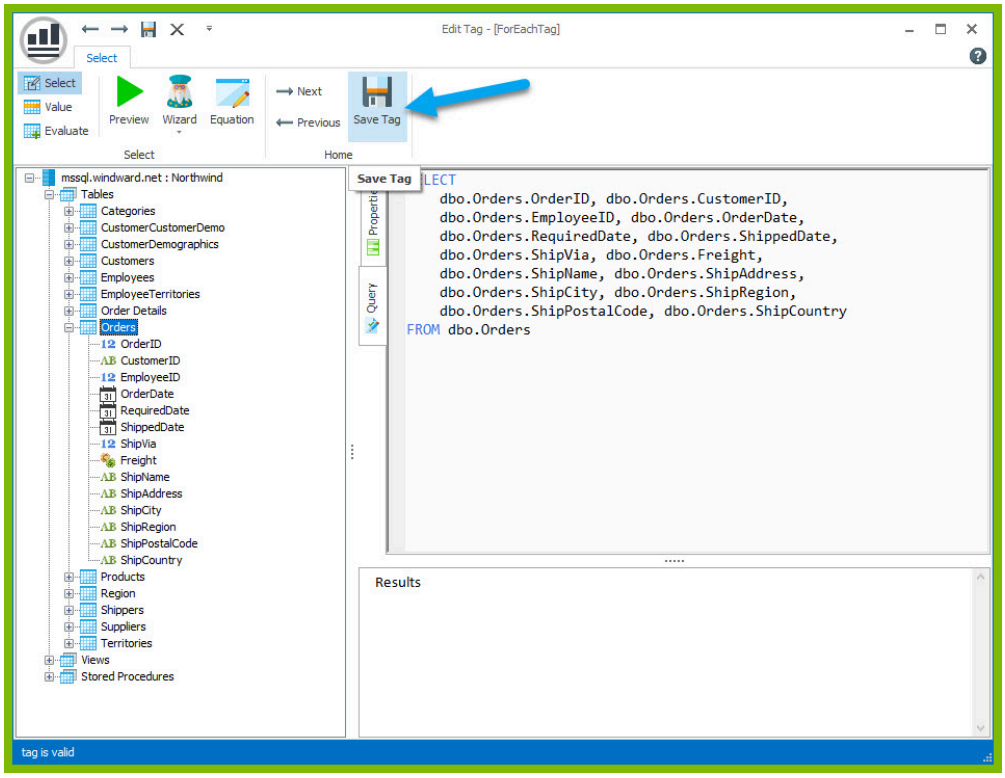


7. In the Tag Tree, expand the table mssql.windward.net : Northwind -> Tables and double-click the **"Orders"** table. This will automatically write a select for every column in the Orders table.

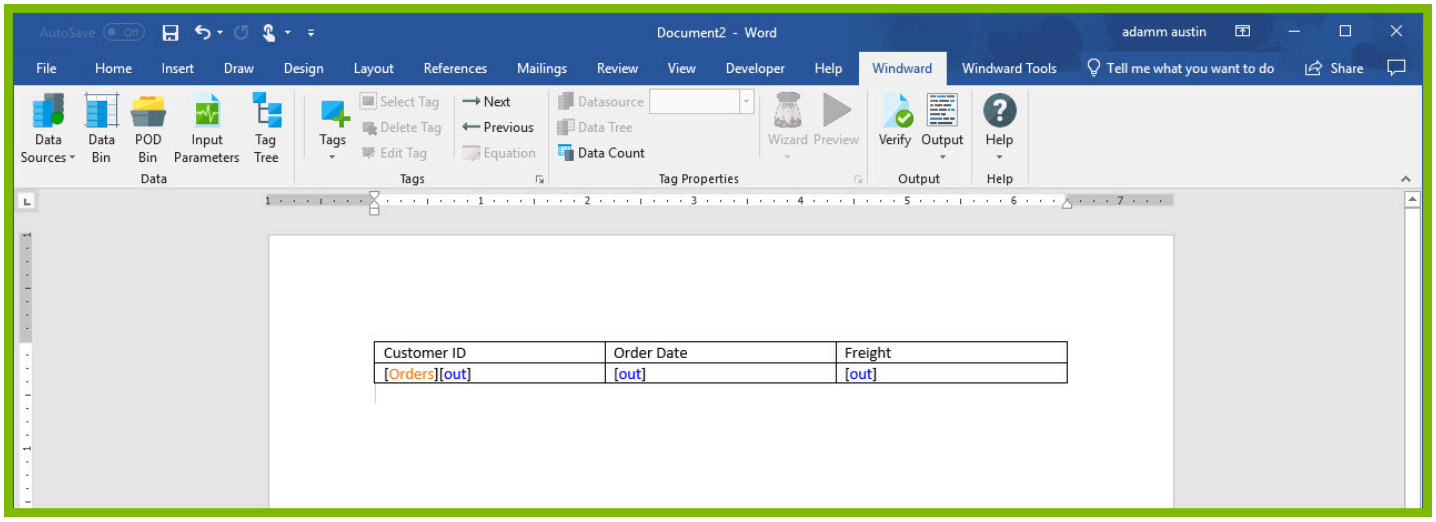
8. Go to the "**Properties"** and assign your tag a nickname "Orders".



9. Click the "**Save Tag**" button.

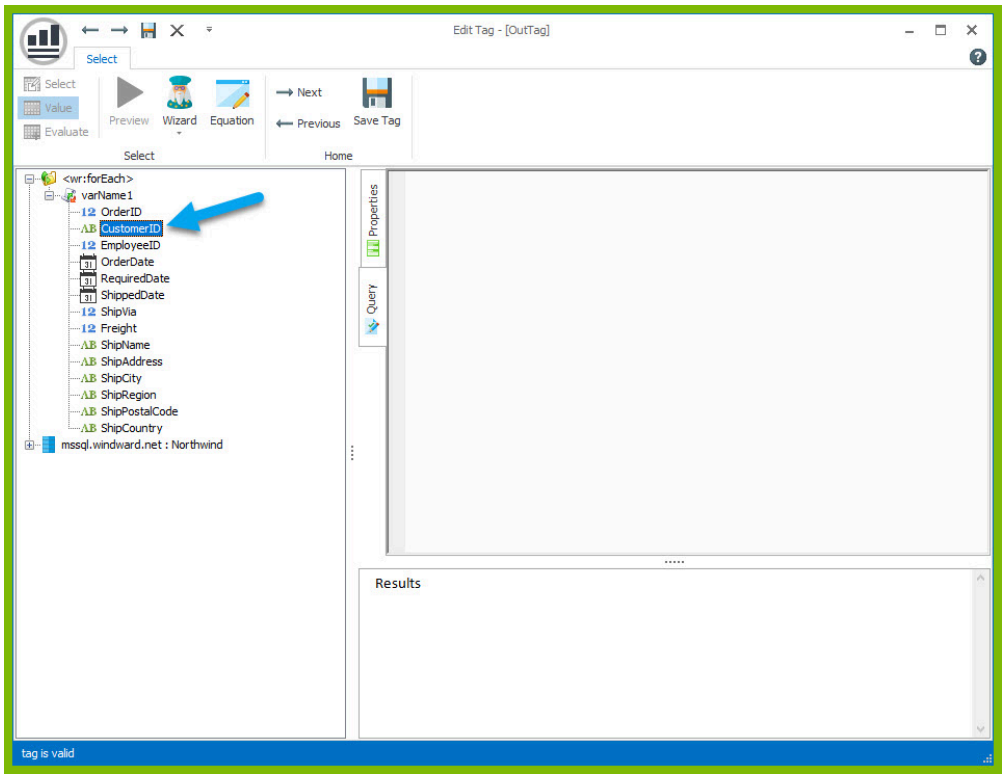


10. To output data in our table, we will need to add out tags. Place your cursor after the ForEach tag in the “Customer ID” column and place an out tag. Place an out tag in the other two columns.

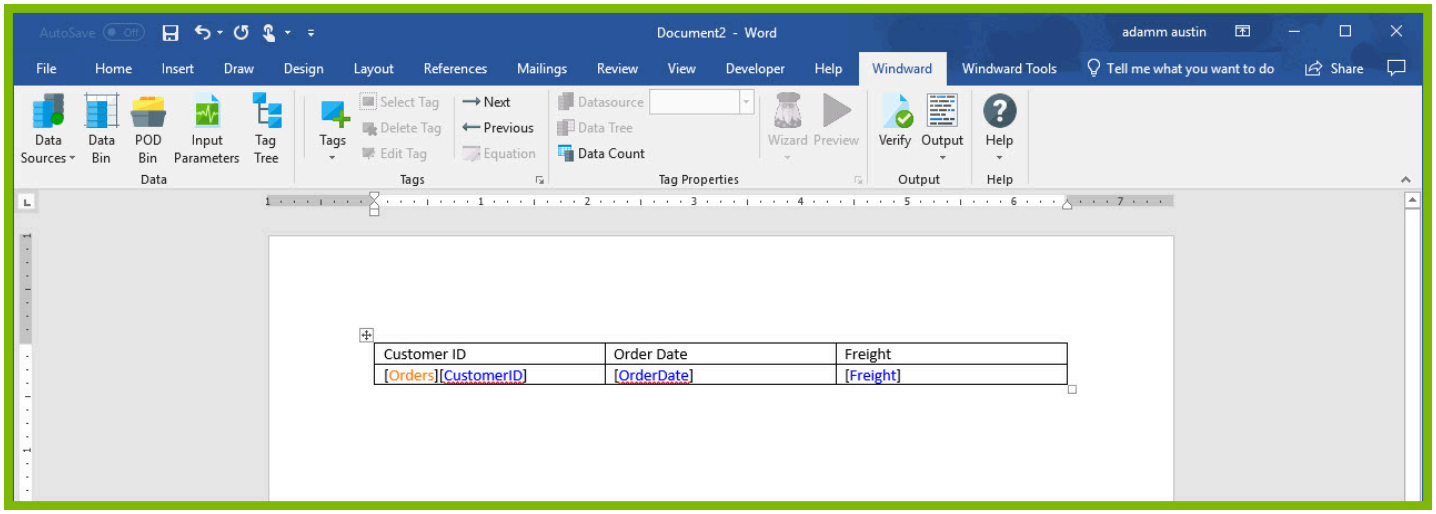


11. Open the Tag Editor for the Out tag in the “Customer ID” column.

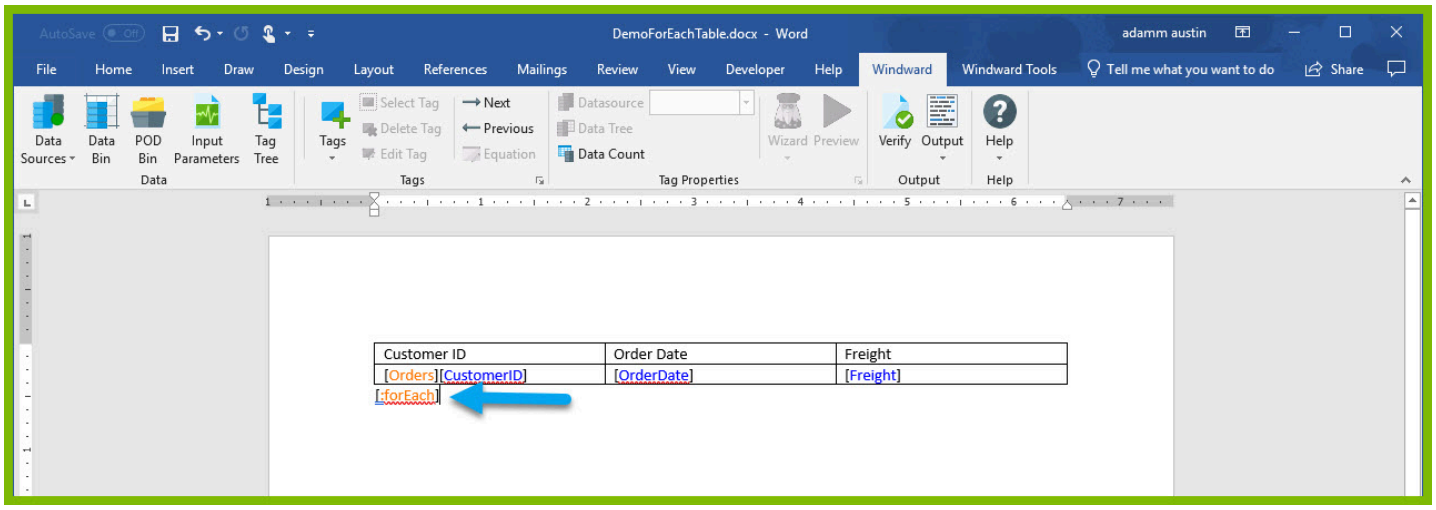
12. In the Tag Tree, expand the <wr:forEach> -< varName1 and double-click the **“CustomerID”** node. This will automatically write a select for CustomerID currently captured by the ForEach variable.



13. Save the tag and repeat the previous two steps to select the “OrderDate” node for the “Order Date” column and the “Freight” node for the “Freight” column.

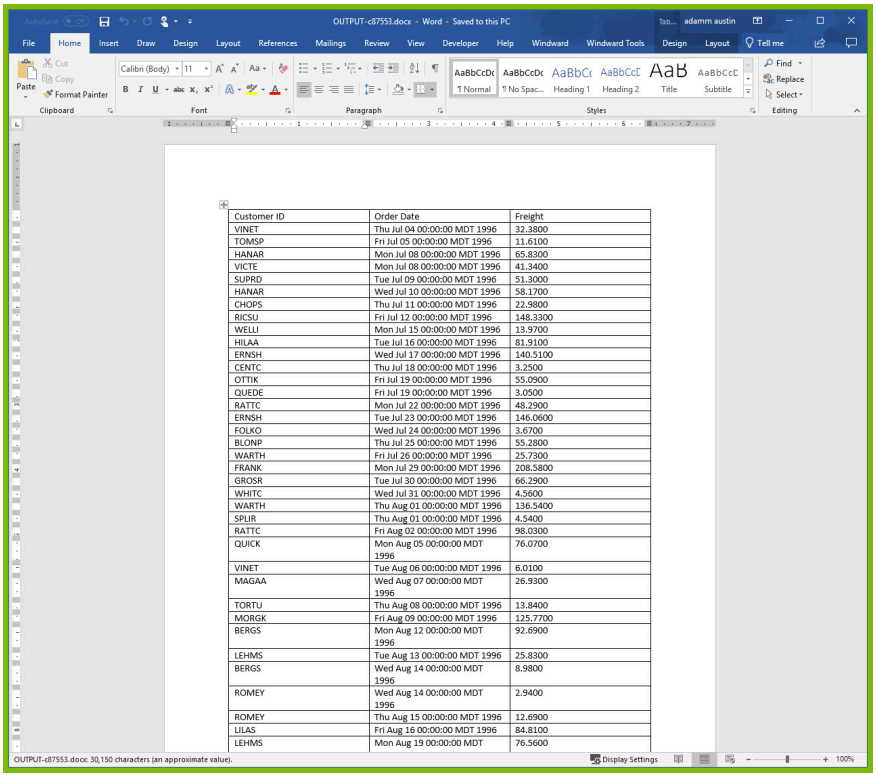


14. On the line after your table, place an EndForEach tag



Since the ForEach loop will re-produce the tag output and content captured between the ForEach and the EndForEach tags, one row of the table will be produced for every record returned by the ForEach tags select.

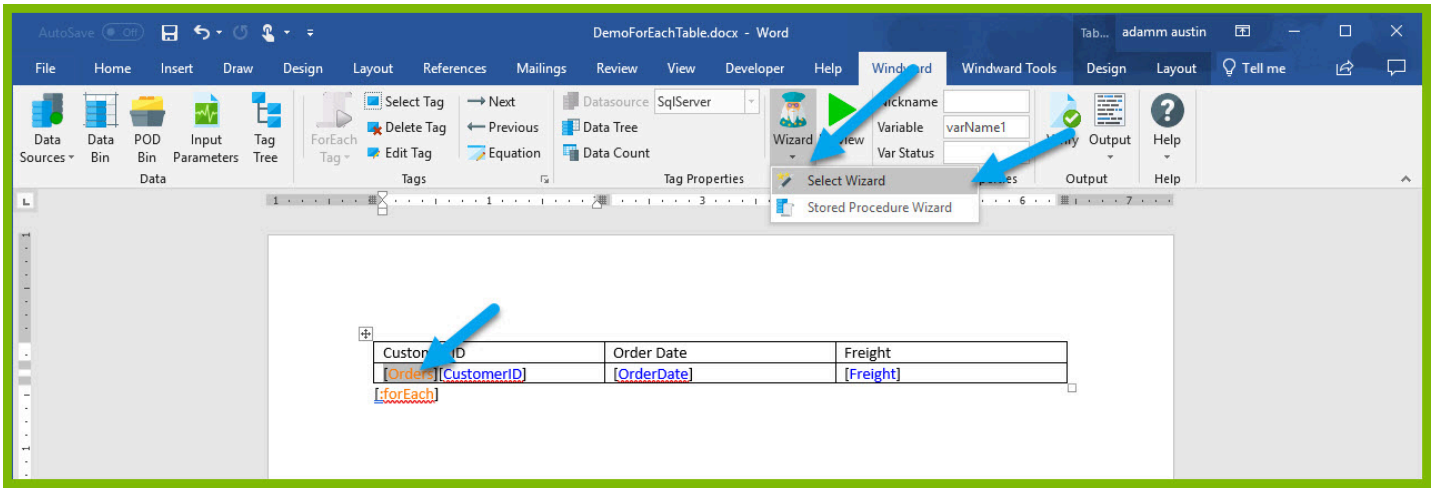
15. Save and output the template to DOCX output and see your results:

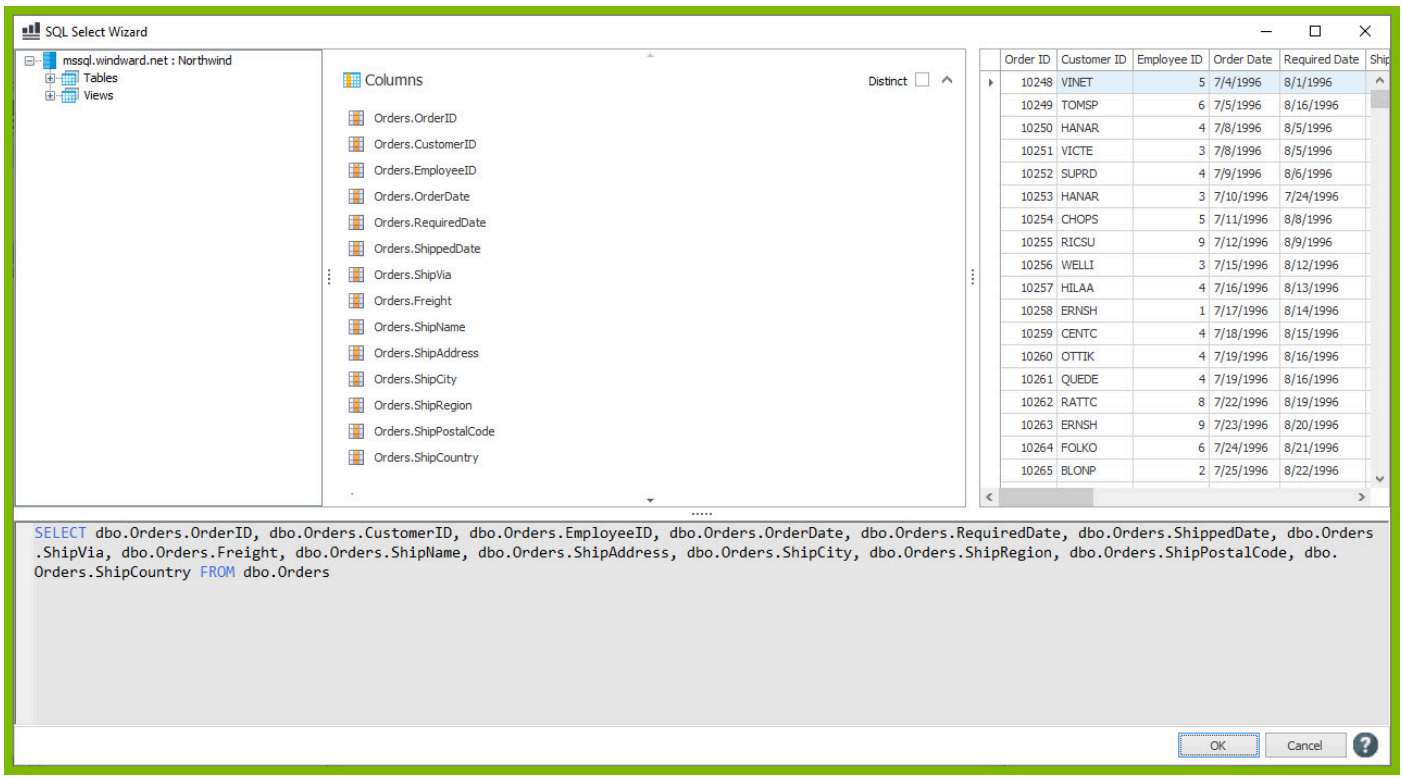


Customer ID	Order Date	Freight
VINET	Thu Jul 04 00:00:00 MDT 1996	32.3800
TOMSP	Fri Jul 05 00:00:00 MDT 1996	11.6100
HANAR	Mon Jul 08 00:00:00 MDT 1996	65.8300
VICTE	Mon Jul 08 00:00:00 MDT 1996	41.3400
SUPRD	Tue Jul 09 00:00:00 MDT 1996	51.3000
HANAR	Wed Jul 10 00:00:00 MDT 1996	58.1700
CHOPS	Thu Jul 11 00:00:00 MDT 1996	22.9800
RICSU	Fri Jul 12 00:00:00 MDT 1996	148.3300
WELLI	Mon Jul 15 00:00:00 MDT 1996	13.9700
HILAA	Tue Jul 16 00:00:00 MDT 1996	81.9100
ERNSH	Wed Jul 17 00:00:00 MDT 1996	140.5100
CENTC	Thu Jul 18 00:00:00 MDT 1996	3.2500
OTTIK	Fri Jul 19 00:00:00 MDT 1996	55.0900
QUEDE	Fri Jul 19 00:00:00 MDT 1996	3.0500
RATTC	Mon Jul 22 00:00:00 MDT 1996	48.2900
ERNSH	Tue Jul 23 00:00:00 MDT 1996	146.0600
FOLKO	Wed Jul 24 00:00:00 MDT 1996	3.6700
BLONP	Thu Jul 25 00:00:00 MDT 1996	55.2800
WARTH	Fri Jul 26 00:00:00 MDT 1996	25.7300
FRANK	Mon Jul 29 00:00:00 MDT 1996	208.5800
GROSR	Tue Jul 30 00:00:00 MDT 1996	66.2900
WHITC	Wed Jul 31 00:00:00 MDT 1996	4.5600
WARTH	Thu Aug 01 00:00:00 MDT 1996	136.5400
SPLIR	Thu Aug 01 00:00:00 MDT 1996	4.5400
RATTC	Fri Aug 02 00:00:00 MDT 1996	98.0300
QUICK	Mon Aug 05 00:00:00 MDT 1996	76.0700
VINET	Tue Aug 06 00:00:00 MDT 1996	6.0100
MAGAA	Wed Aug 07 00:00:00 MDT 1996	26.9300
TORTU	Thu Aug 08 00:00:00 MDT 1996	13.8400
MORGK	Fri Aug 09 00:00:00 MDT 1996	125.7700
BERGS	Mon Aug 12 00:00:00 MDT 1996	92.6900
LEHMS	Tue Aug 13 00:00:00 MDT 1996	25.8300
BERGS	Wed Aug 14 00:00:00 MDT 1996	8.9800
ROMEY	Wed Aug 14 00:00:00 MDT 1996	2.9400
ROMEY	Thu Aug 15 00:00:00 MDT 1996	12.6900
LILAS	Fri Aug 16 00:00:00 MDT 1996	84.8100
LEHMS	Mon Aug 19 00:00:00 MDT	76.5600

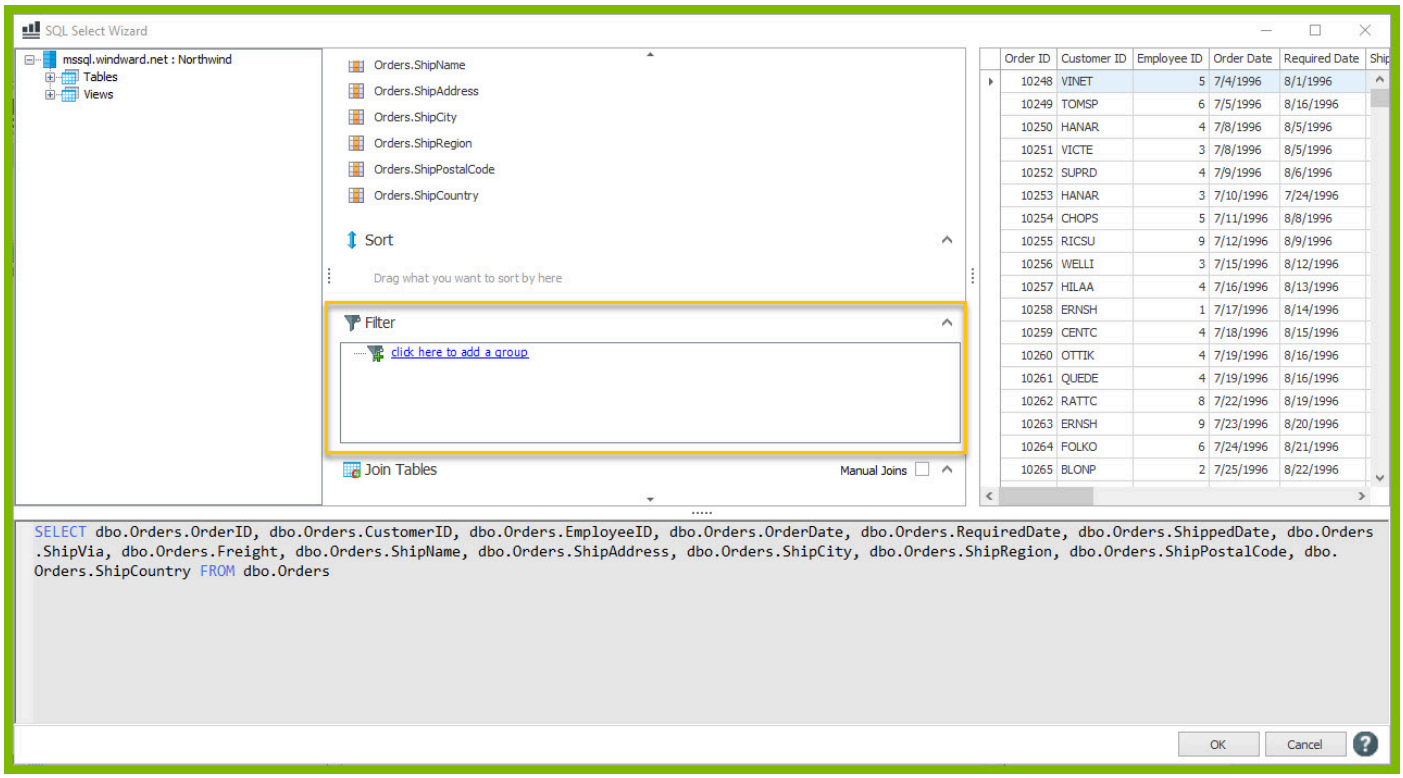
We are receiving the output we expected, but it is not very useful. To reduce the number of records in our output table, we need to reduce the number of records in our select.

1. Close your output and go back to your template. Place your cursor on the ForEach tag and click the bottom of the "**Wizard**" button to open the drop-down. In the drop-down click "**Select Wizard**." The Select Wizard will allow us to make our tag select more specific data from the Database.

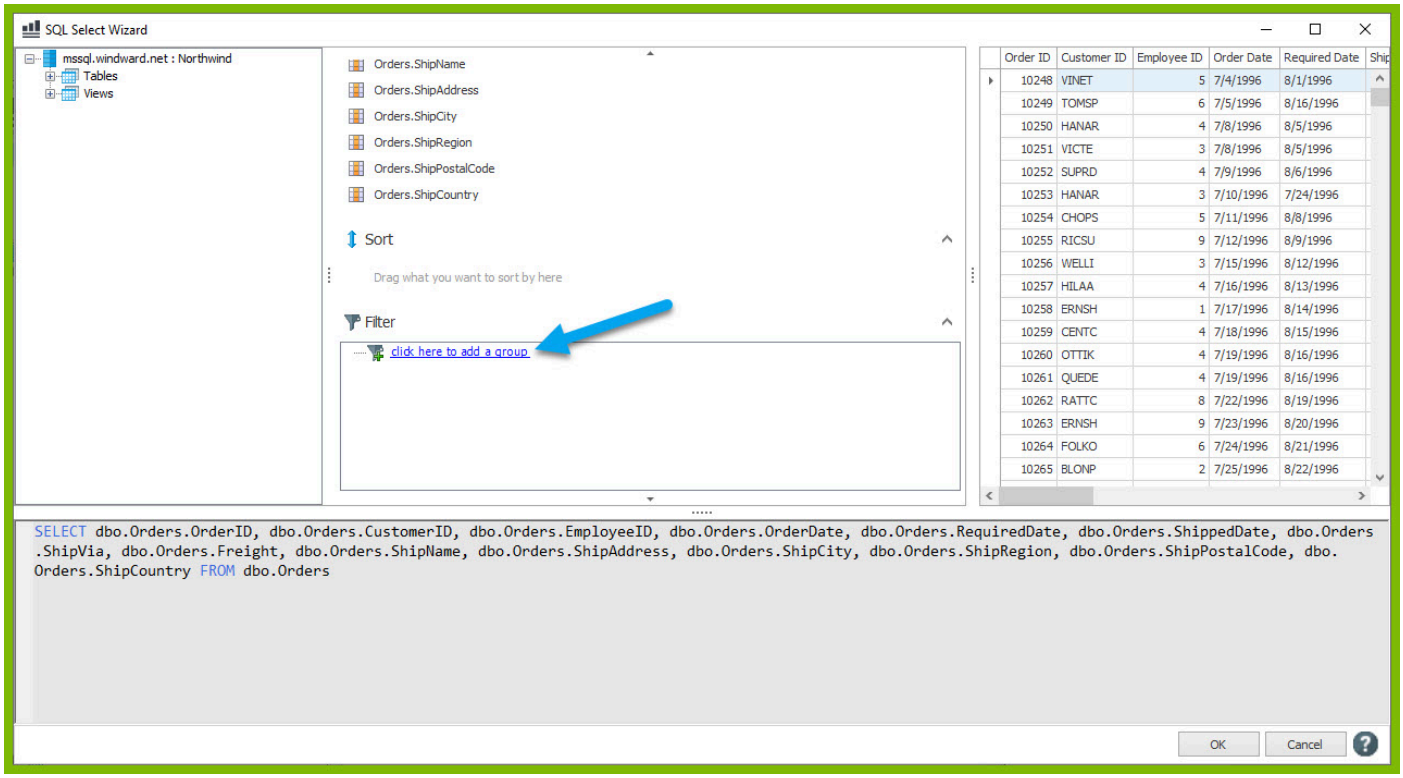


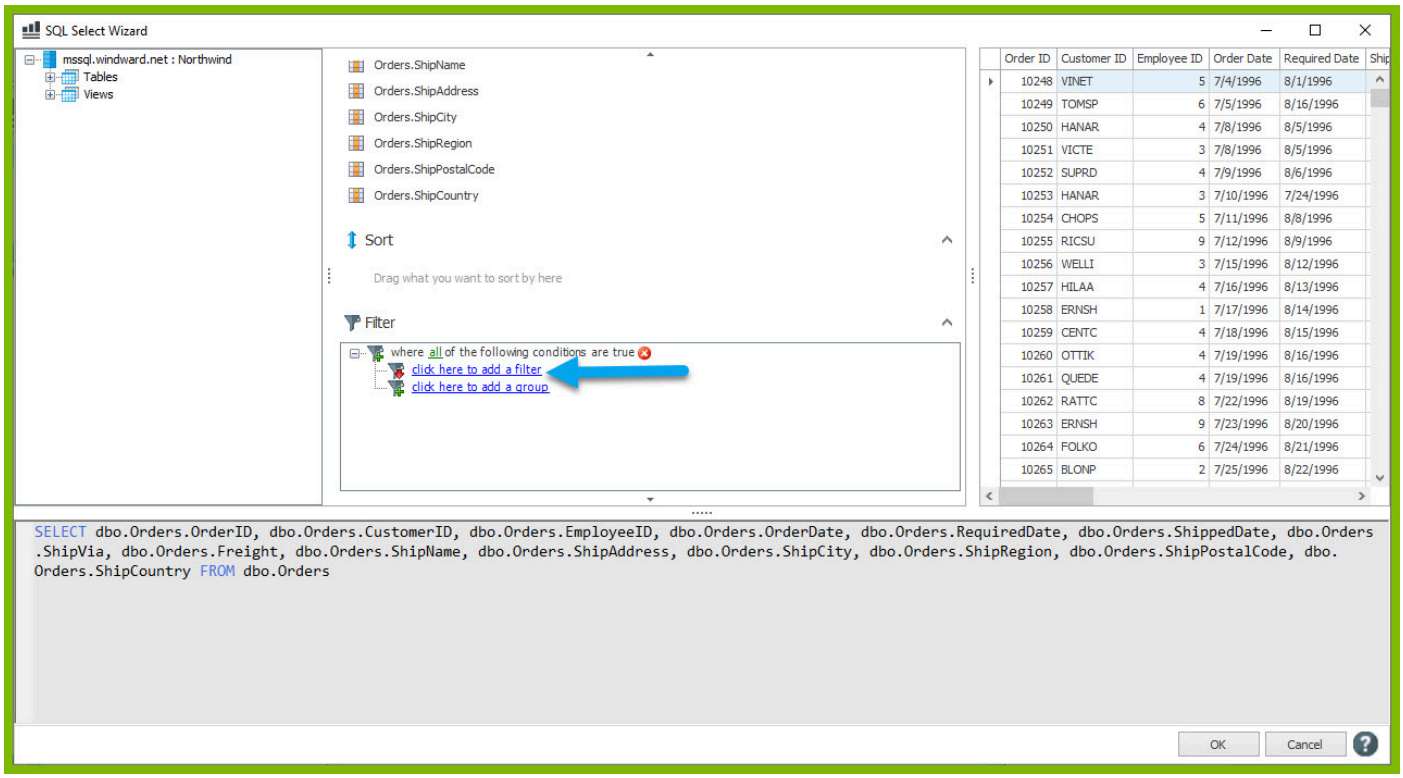


2. In the SQL Wizard, locate the “Filter” section. Adding a filter to our query will allow us to narrow down our select to fewer records of data. In this example, we will filter our select to only look at orders for the customer with CustomerID = “VICTE.”

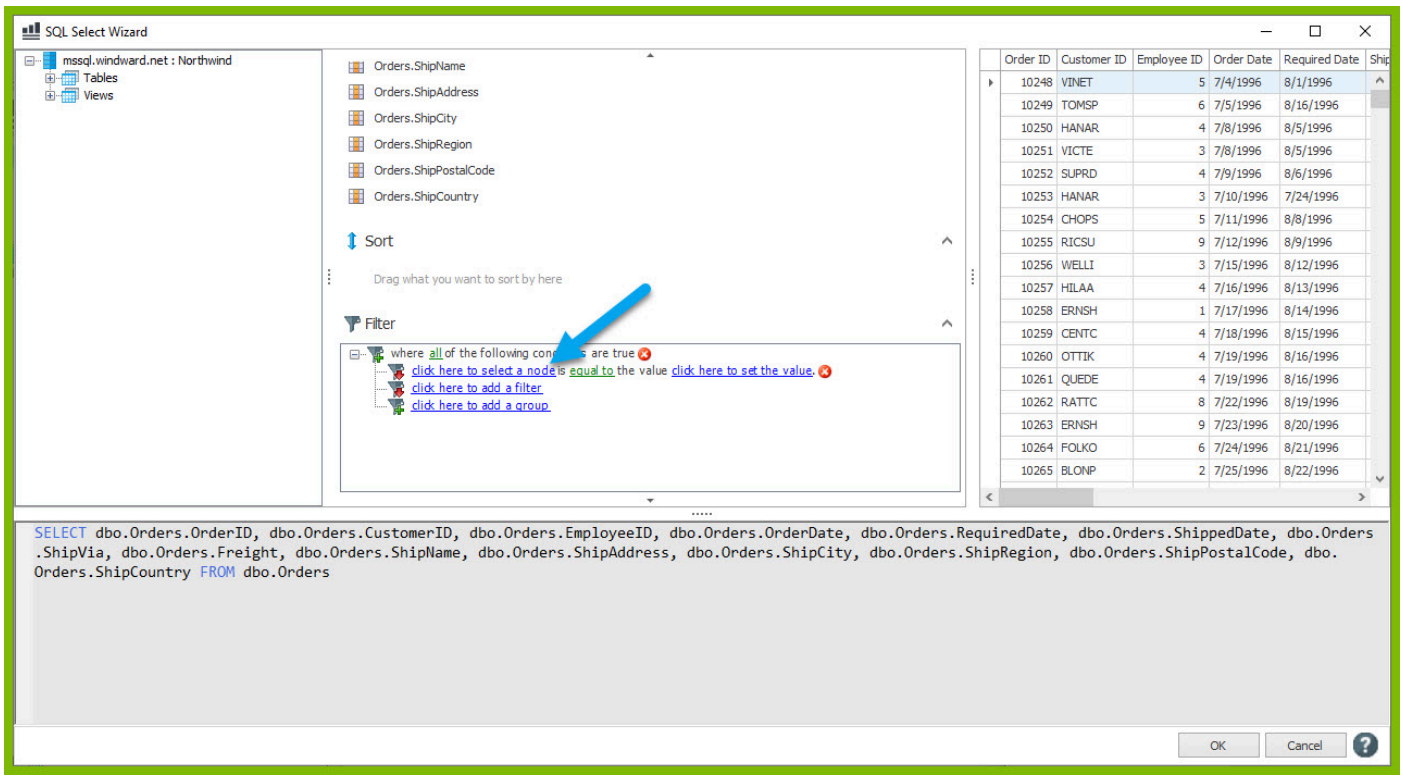


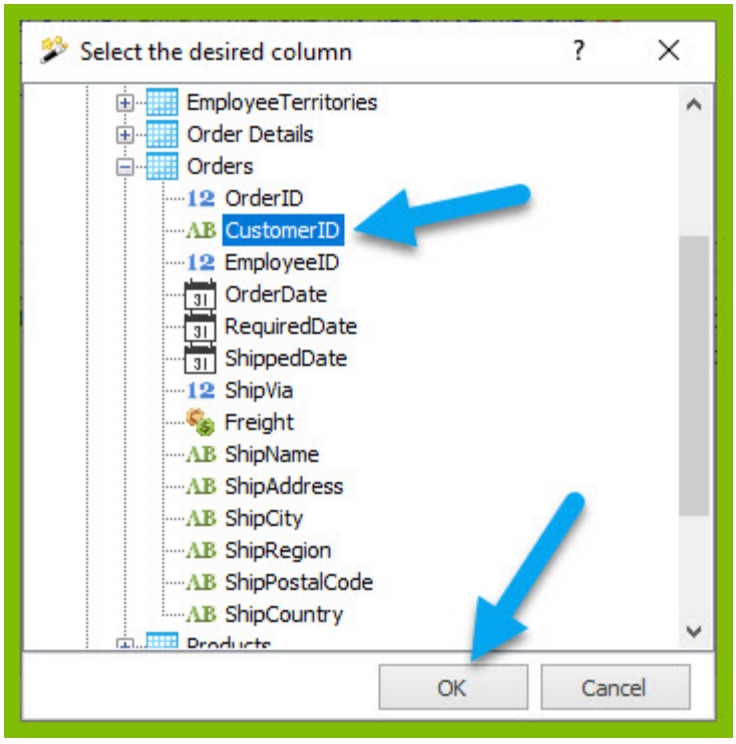
3. Click “**click here to add a group**” followed by “**click here to add a filter.**”



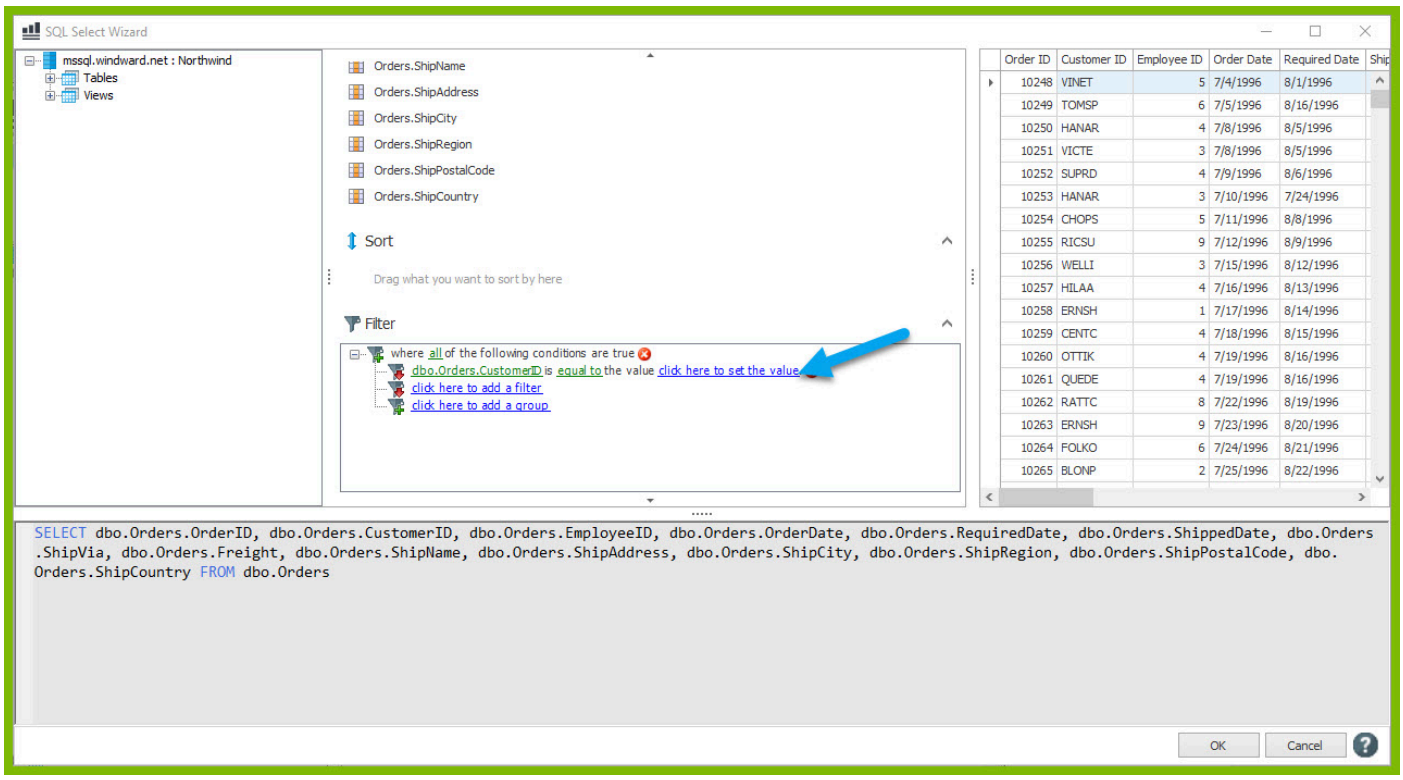


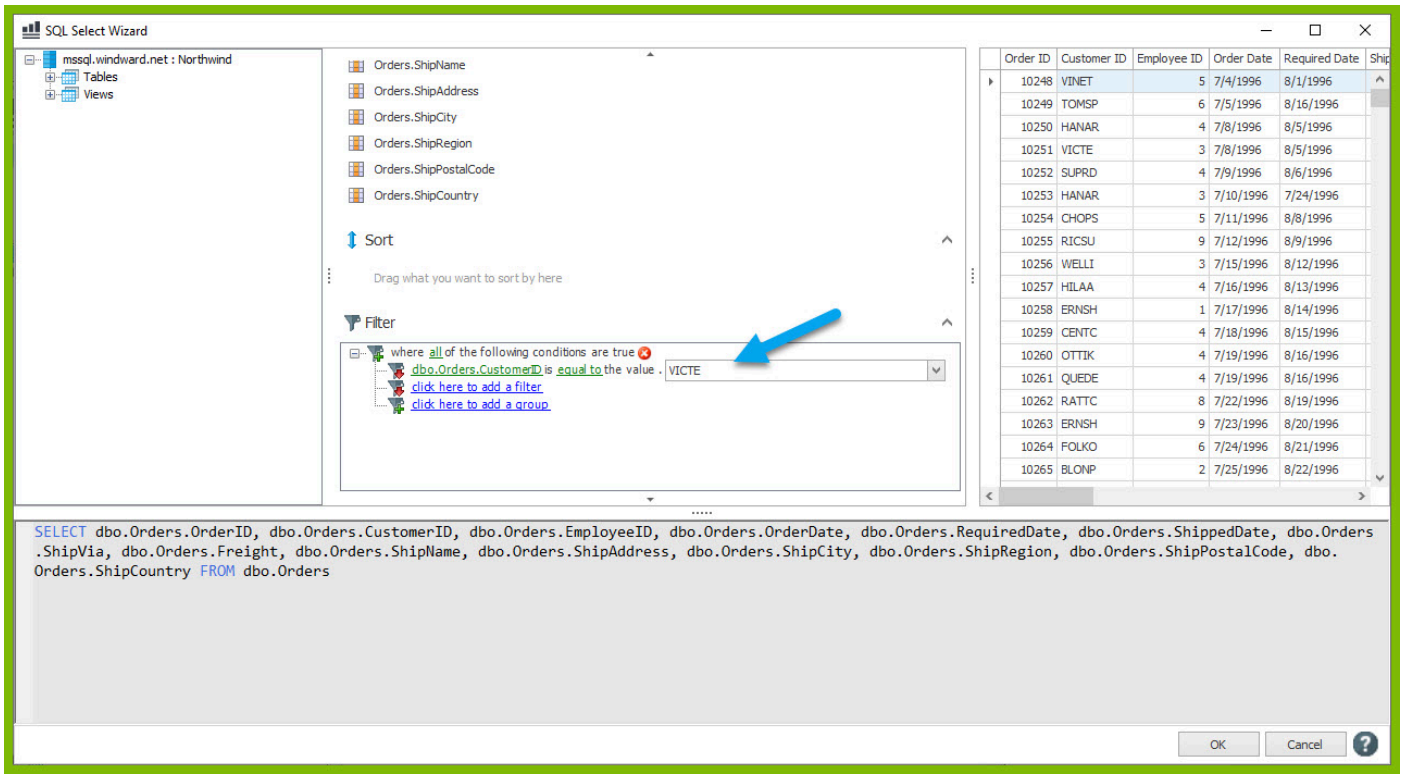
4. Click on “**click here to select a node**” and from the “Select the desired column” dialog, select the **mssql.windward.net : Northwind** → **Tables** → **Orders** → **CustomerID** node.





5. To compare the CustomerID column to the value "VICTE," click "**click here to set the value**," and in the text box that appears enter the text "**VICTE**". Click enter to save the value.


SQL Select Wizard
mssql.windward.net : Northwind
Tables
Views
Orders.ShipName
Orders.ShipAddress
Orders.ShipCity
Orders.ShipRegion
Orders.ShipPostalCode
Orders.ShipCountry
Sort
Drag what you want to sort by here
Filter
where all of the following conditions are true
dbo.Orders.CustomerID is equal to the value click here to set the value
click here to add a filter
click here to add a group
Order ID | Customer ID | Employee ID | Order Date | Required Date
10248 VINET 5 7/4/1996 8/1/1996
10249 TOMSP 6 7/5/1996 8/16/1996
10250 HANAR 4 7/8/1996 8/5/1996
10251 VICTE 3 7/8/1996 8/5/1996
10252 SUPRD 4 7/9/1996 8/6/1996
10253 HANAR 3 7/10/1996 7/24/1996
10254 CHOPS 5 7/11/1996 8/8/1996
10255 RICSU 9 7/12/1996 8/9/1996
10256 WELLI 3 7/15/1996 8/12/1996
10257 HILAA 4 7/16/1996 8/13/1996
10258 ERNSH 1 7/17/1996 8/14/1996
10259 CENTC 4 7/18/1996 8/15/1996
10260 OTTIK 4 7/19/1996 8/16/1996
10261 QUEDE 4 7/19/1996 8/16/1996
10262 RATTC 8 7/22/1996 8/19/1996
10263 ERNSH 9 7/23/1996 8/20/1996
10264 FOLKO 6 7/24/1996 8/21/1996
10265 BLONP 2 7/25/1996 8/22/1996
SELECT dbo.Orders.OrderID, dbo.Orders.CustomerID, dbo.Orders.EmployeeID, dbo.Orders.OrderDate, dbo.Orders.RequiredDate, dbo.Orders.ShippedDate, dbo.Orders.ShipVia, dbo.Orders.Freight, dbo.Orders.ShipName, dbo.Orders.ShipAddress, dbo.Orders.ShipCity, dbo.Orders.ShipRegion, dbo.Orders.ShipPostalCode, dbo.Orders.ShipCountry FROM dbo.Orders
OK
Cancel


SQL Select Wizard
mssql.windward.net : Northwind
Tables
Views
Orders.ShipName
Orders.ShipAddress
Orders.ShipCity
Orders.ShipRegion
Orders.ShipPostalCode
Orders.ShipCountry
Sort
Drag what you want to sort by here
Filter
where all of the following conditions are true
dbo.Orders.CustomerID is equal to the value . VICTE
click here to add a filter
click here to add a group
Order ID | Customer ID | Employee ID | Order Date | Required Date
10248 VINET 5 7/4/1996 8/1/1996
10249 TOMSP 6 7/5/1996 8/16/1996
10250 HANAR 4 7/8/1996 8/5/1996
10251 VICTE 3 7/8/1996 8/5/1996
10252 SUPRD 4 7/9/1996 8/6/1996
10253 HANAR 3 7/10/1996 7/24/1996
10254 CHOPS 5 7/11/1996 8/8/1996
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10256 WELLI 3 7/15/1996 8/12/1996
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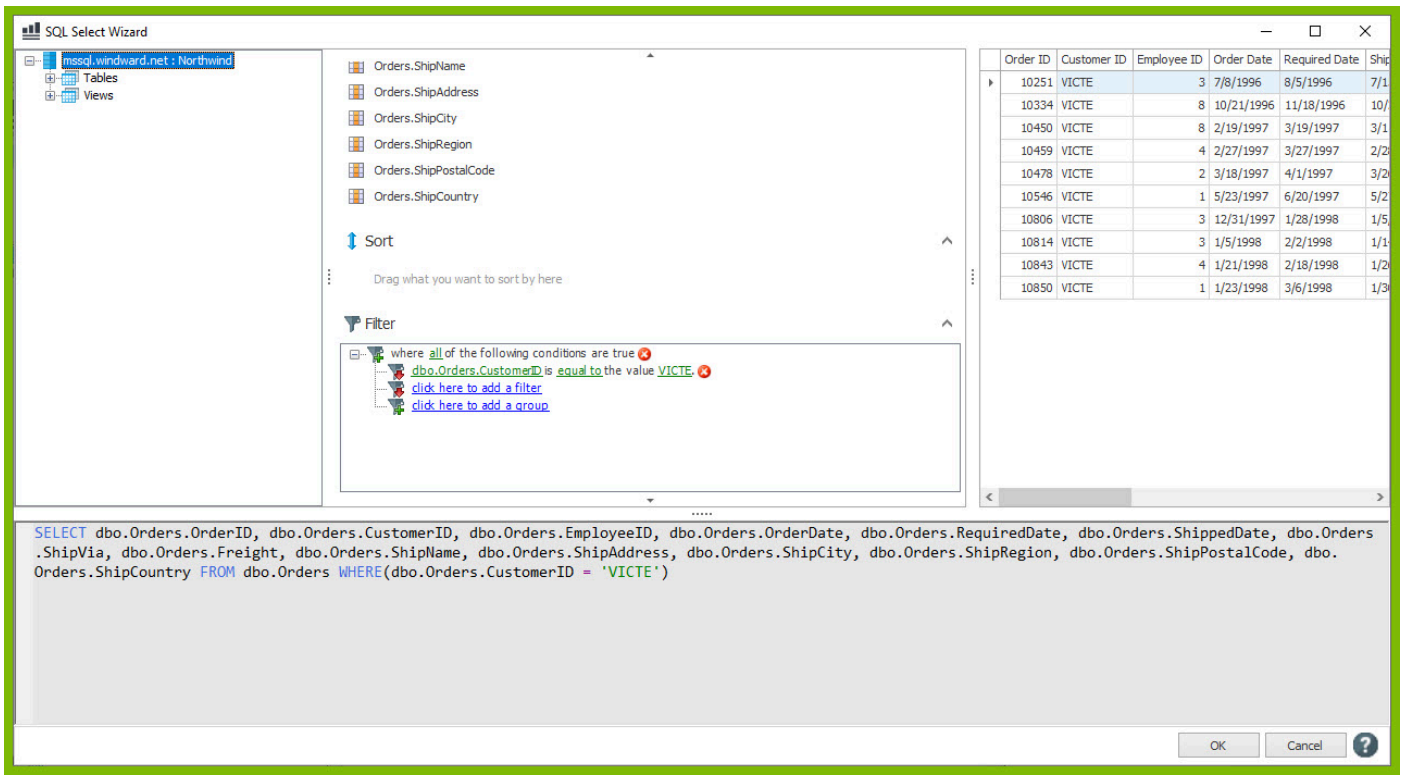
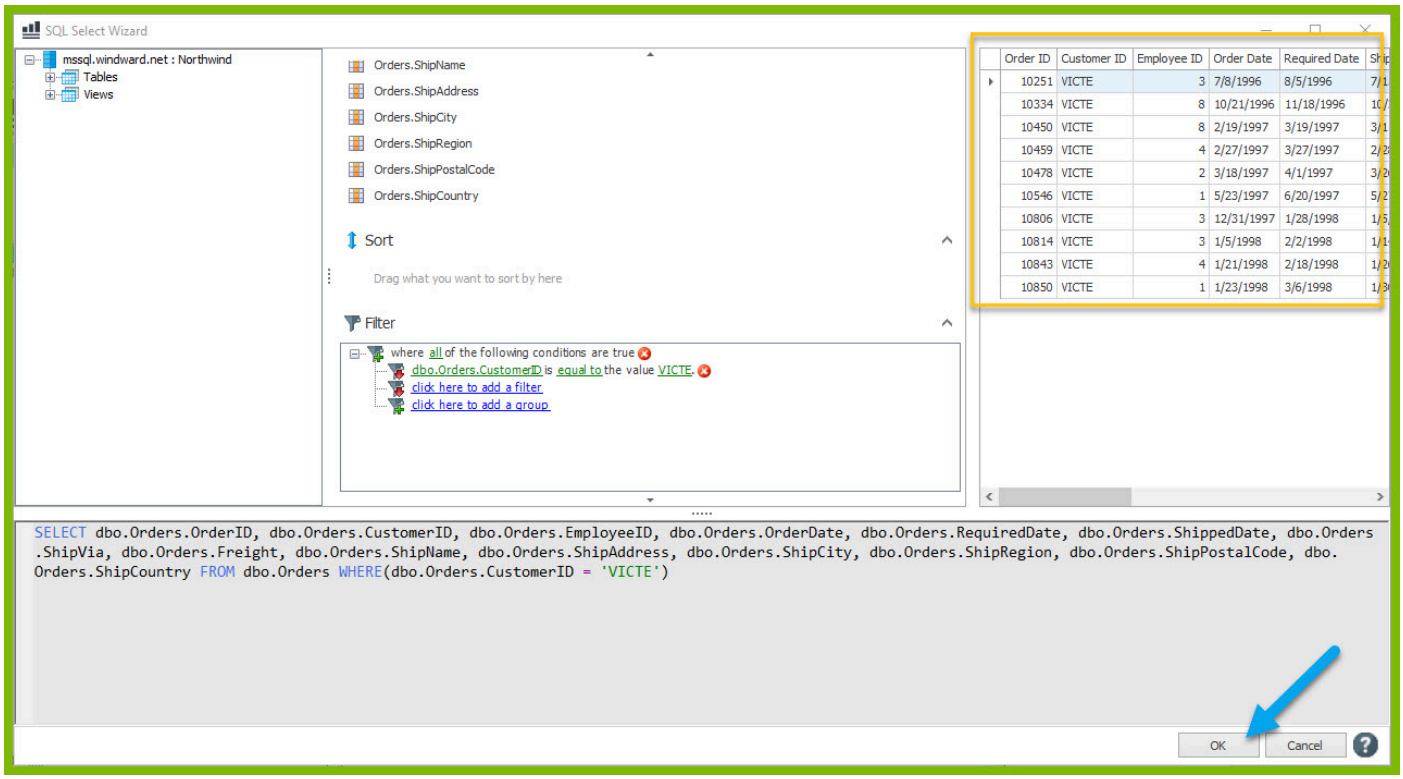
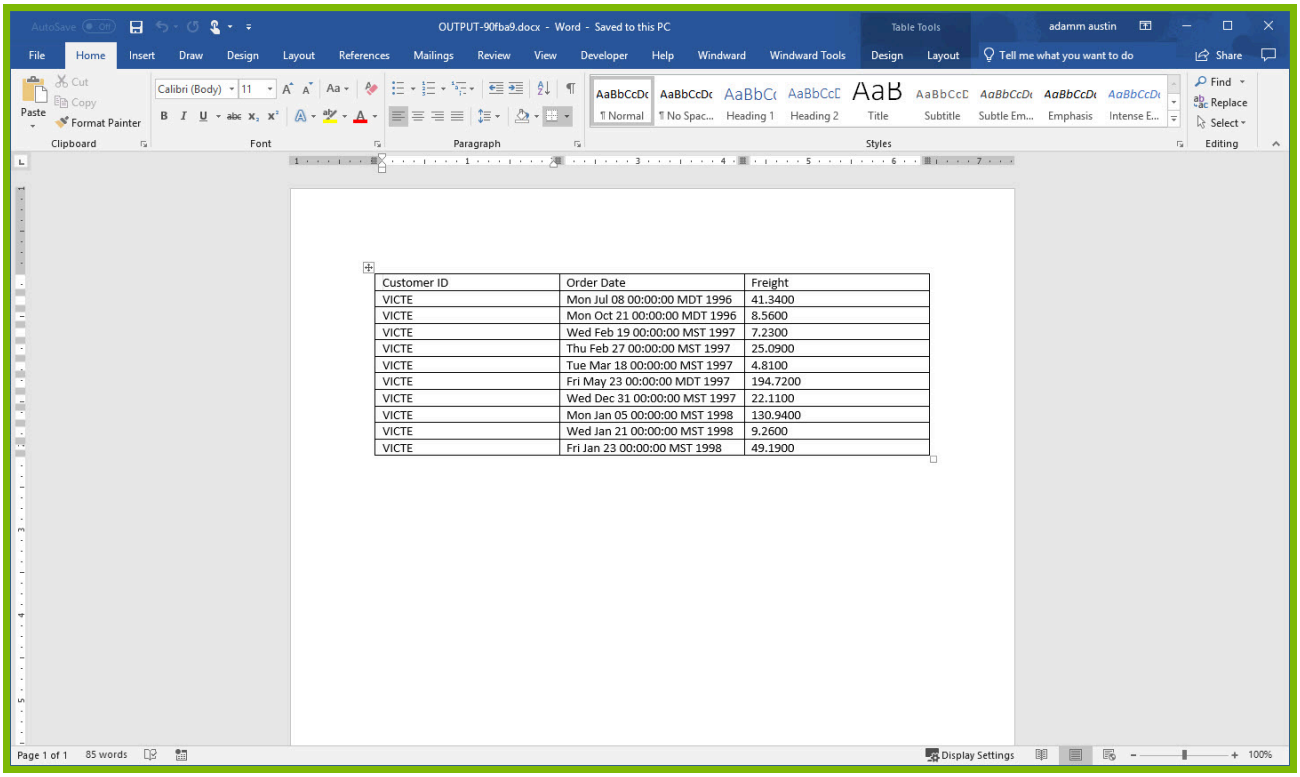
10258 ERNSH 1 7/17/1996 8/14/1996
10259 CENTC 4 7/18/1996 8/15/1996
10260 OTTIK 4 7/19/1996 8/16/1996
10261 QUEDE 4 7/19/1996 8/16/1996
10262 RATTC 8 7/22/1996 8/19/1996
10263 ERNSH 9 7/23/1996 8/20/1996
10264 FOLKO 6 7/24/1996 8/21/1996
10265 BLONP 2 7/25/1996 8/22/1996
SELECT dbo.Orders.OrderID, dbo.Orders.CustomerID, dbo.Orders.EmployeeID, dbo.Orders.OrderDate, dbo.Orders.RequiredDate, dbo.Orders.ShippedDate, dbo.Orders.ShipVia, dbo.Orders.Freight, dbo.Orders.ShipName, dbo.Orders.ShipAddress, dbo.Orders.ShipCity, dbo.Orders.ShipRegion, dbo.Orders.ShipPostalCode, dbo.Orders.ShipCountry FROM dbo.Orders
OK
Cancel



6. You will notice in the preview pane of the Tag Editor only records with CustomerID = VICTE are shown. Click "**OK**" to save your select with the new filter.



7. Re-save your template and output to DOCX. Now your output document has much fewer rows, only displaying rows for the customer with Customer ID = VICTE.



2: Set Tag Tutorial

Prerequisite Tutorials

Before doing this tutorial, we recommend you have done...

1. The Start Here Tutorial

Training Overview

This Training Guide walks you through the fundamentals to understand and use the Set tag.

1. What does a Set tag do?

2. How to use a Set tag

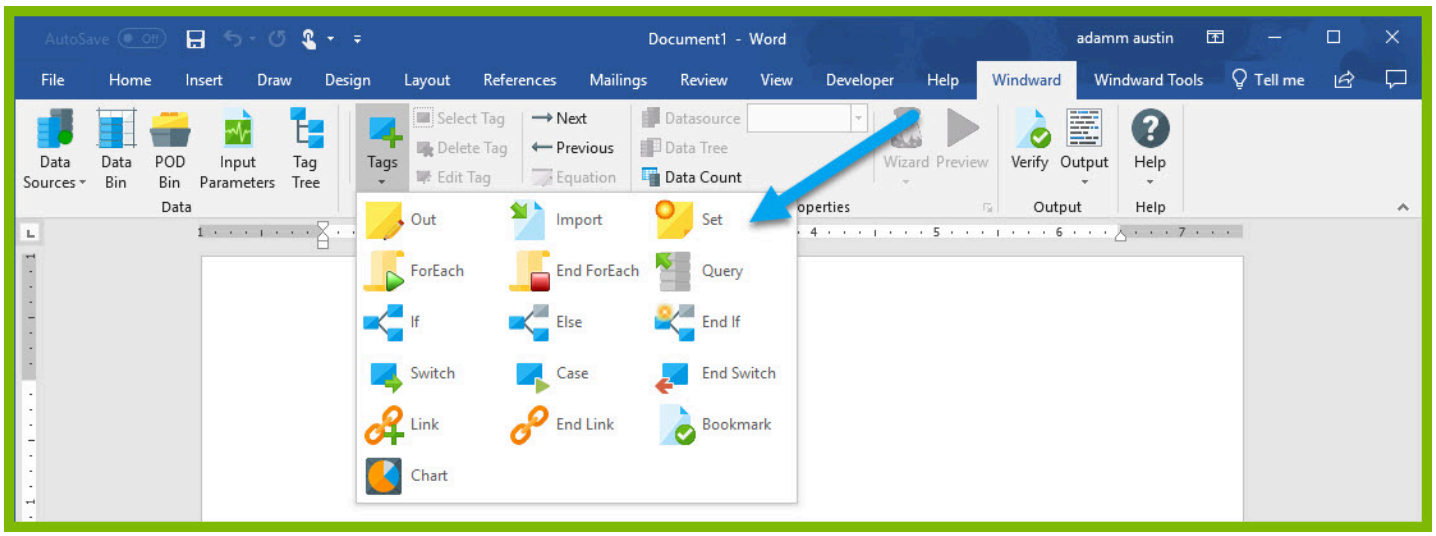
3. Designing a sample template with a Set tag

1 - What does a Set tag do?

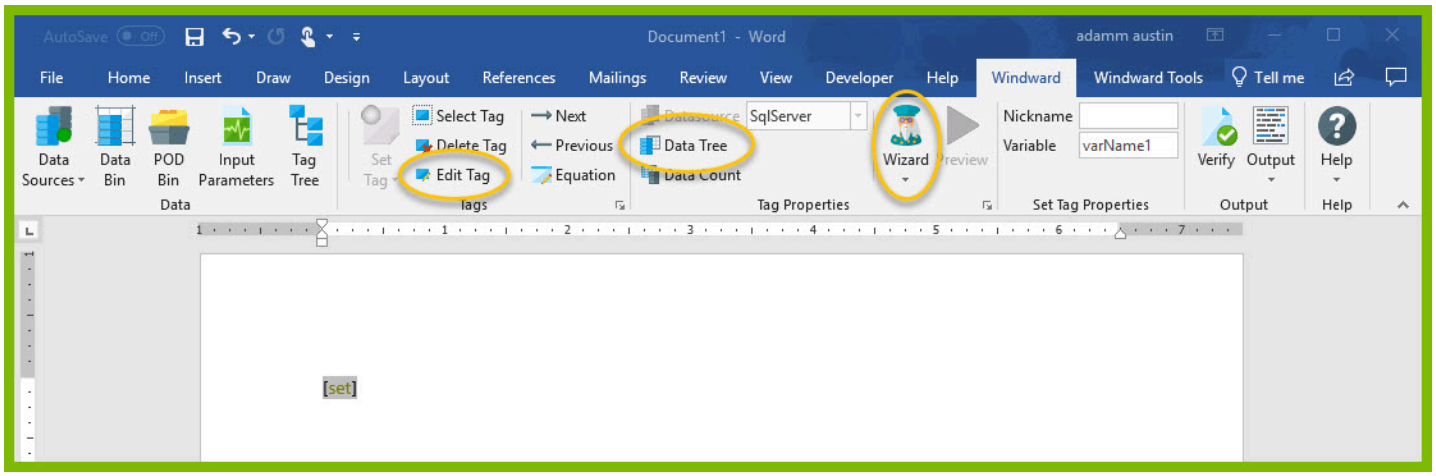
A Set tag allows a user to store information inside of there template in the tag's variable. There is plenty of information you may want to store inside your template. Sometimes you may want to store a template specific value that is always the same so you can use the value in queries in a template. Sometimes you may want to store information that you get out of the database during report generation. Other times, you can use template variables to record some sort of state the template is in. No matter how you use it, Set tags are a useful tool for saving information in your template under a variable name so you can access it again later on.

2 - How to use a Set tag

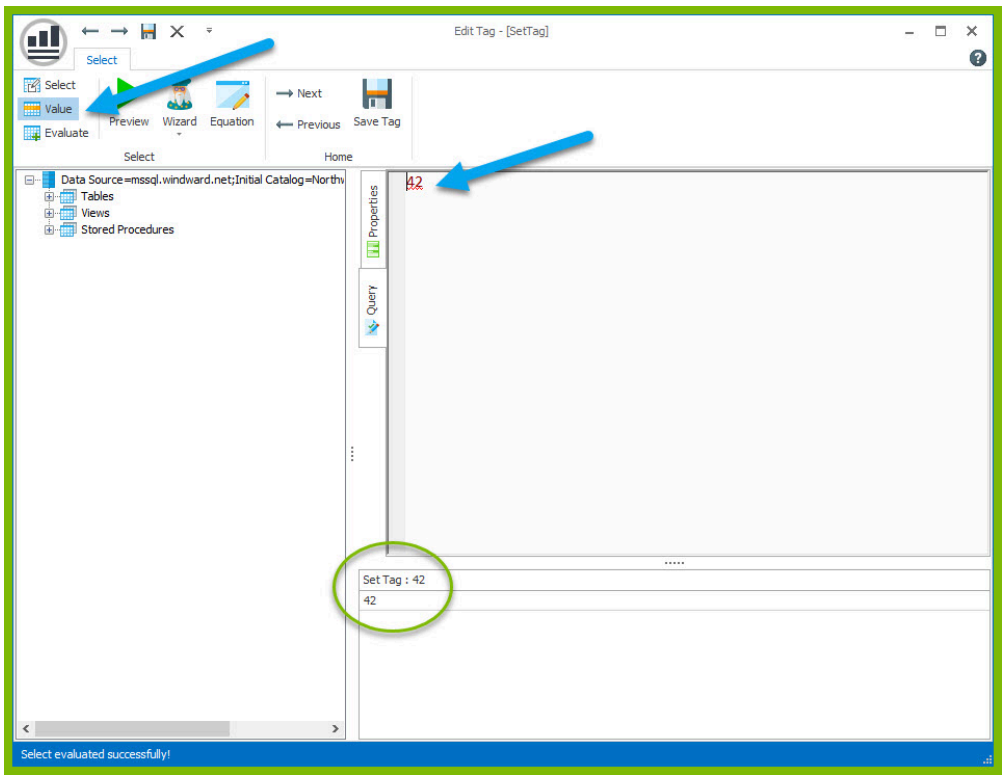
Set tags can be placed in a document from the Tags drop down, just like every other tag.



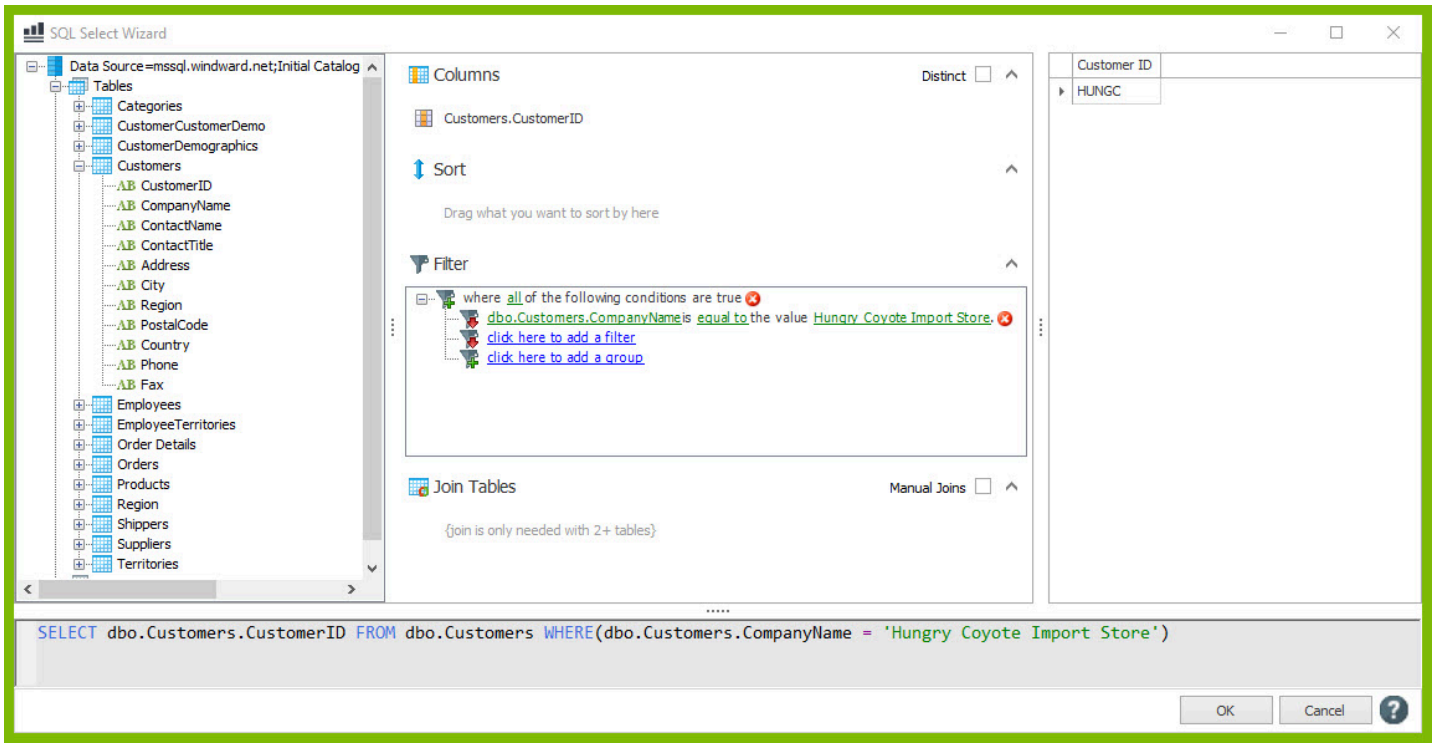
Once in the template, the Set tag can be edited with one of our many tools: the Tag Editor, Wizard, and Tag Tree are all good options.



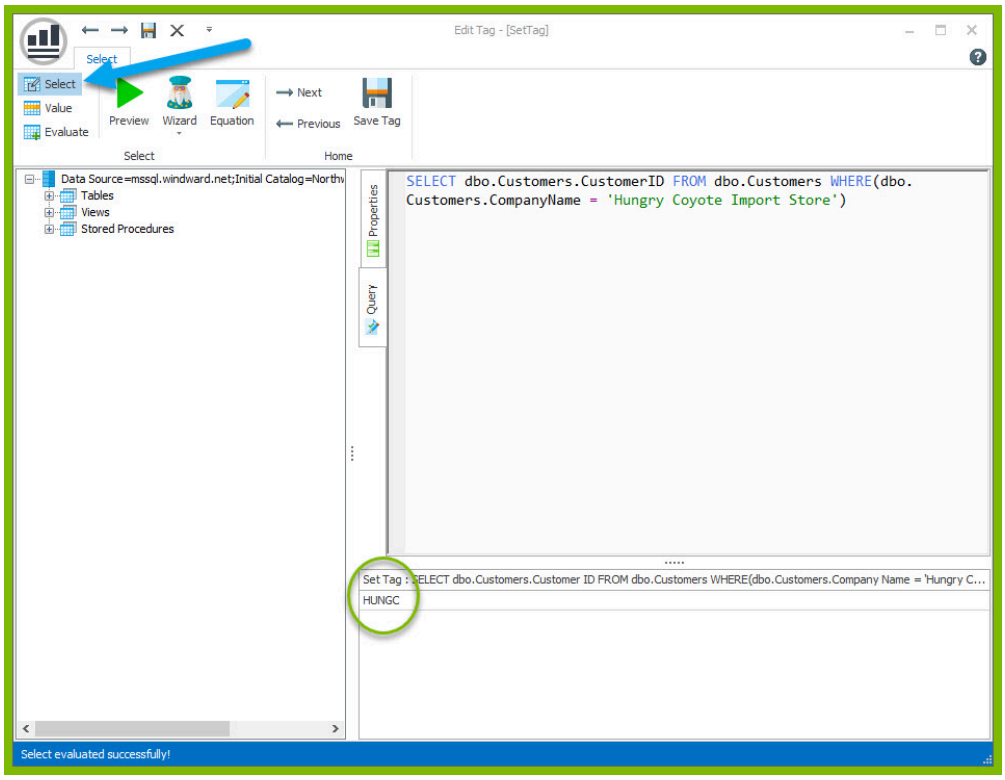
Inside the Tag Editor, we can explicitly set a value for the Set tag by entering it into the query pane of the Tag editor and selecting the “Value” option for the tag. Previewing the tag will show that the value is saved to the tag variable.



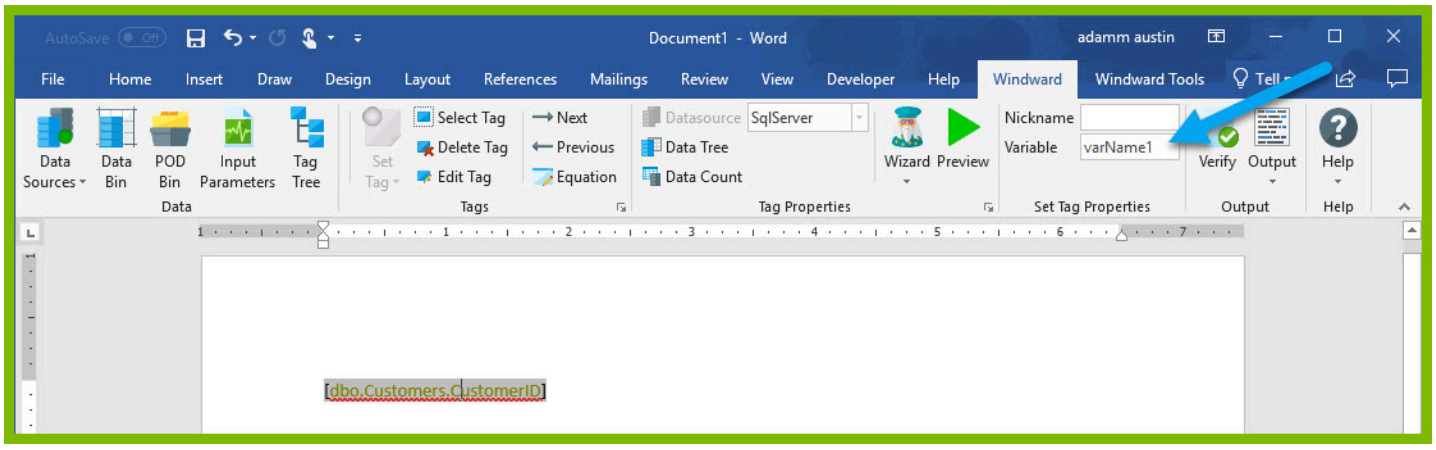
We can also use the Wizard to query specific information from our data, and store the result in the tag variable.



Setting the tag to Select and previewing the tag will show the queried value being saved to the select variable.



The variable name for the tag can be changed to make the variable more easily recognizable in the template later.



3 - Designing a sample template with a Set tag

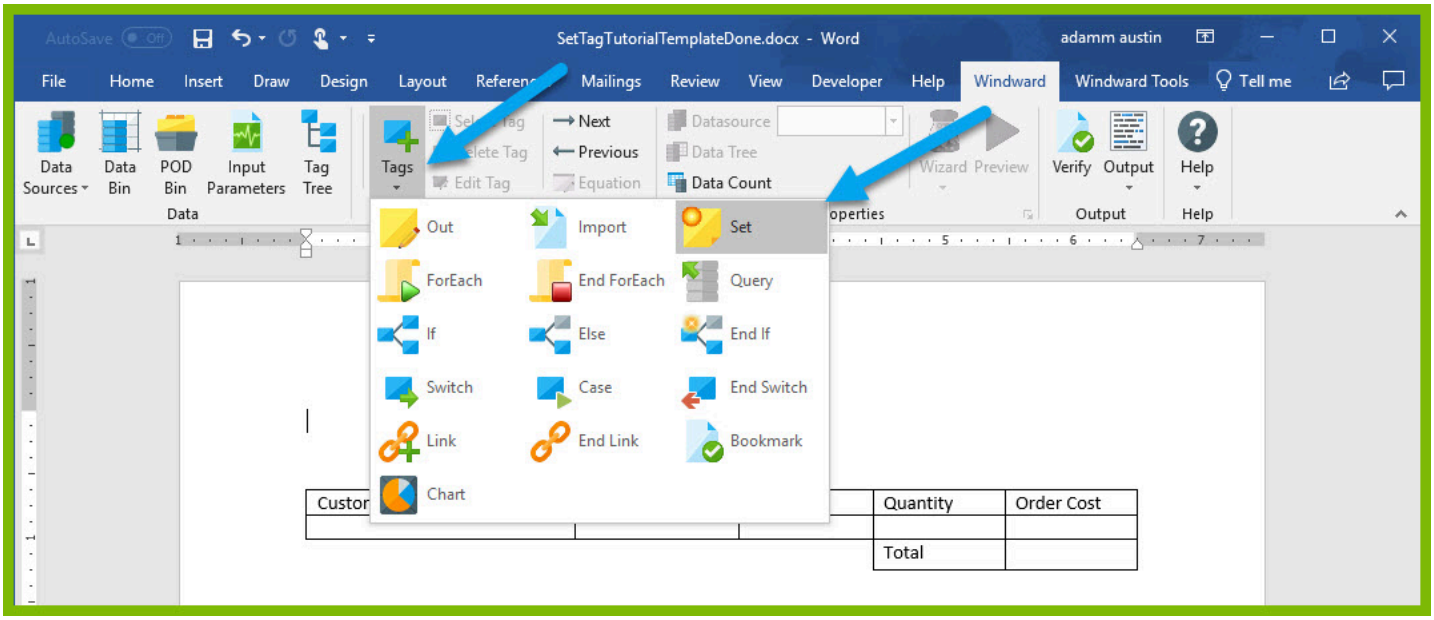
To demonstrate use of the Set tag, you will make a basic template that calculates a total cost of orders by a company.

⚠ Please download this DOCX file with a basic template structure provided for you to use in this tutorial: [Set Tag Training Template](#).

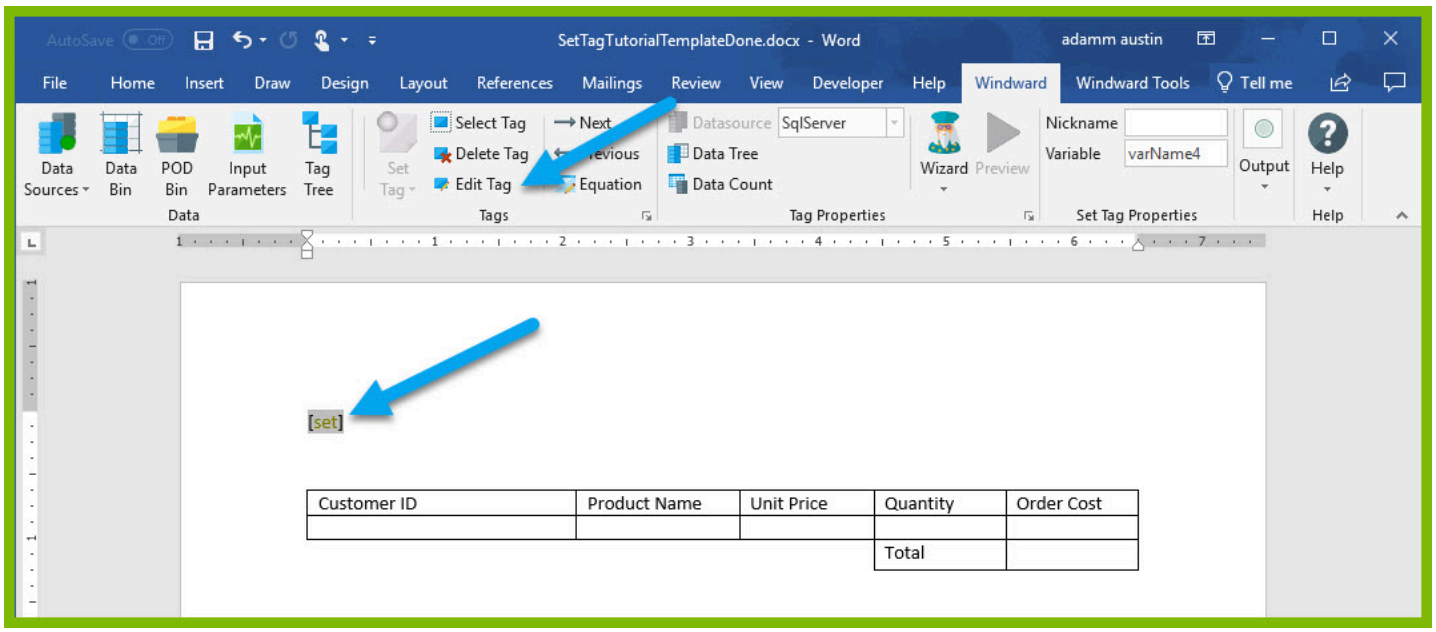
1. Open Microsoft Word. Now that you've installed Windward Designer, you will see two new tabs in the Microsoft Office Ribbon – the "**Windward**" Tab and the "**Windward Tools**" Tab.
2. Click on the "Windward" Tab and click on the "**Data Sources**" button located on the left-hand side of the ribbon. This opens the Connection Editor where you will manage all of your data connections.
3. In the Connection Editor window, select the data connection labeled "**SqlServer**" under "Recent Inactive" and click the "**Connect**" button.
4. Close the Connection Editor by clicking "Close." You have now successfully connected to the sample data!

Now you will start tagging the template. The goal of this template is, for a single CustomerID, to output every order by that customer, some details about the order, and total amount for all orders from the customer.

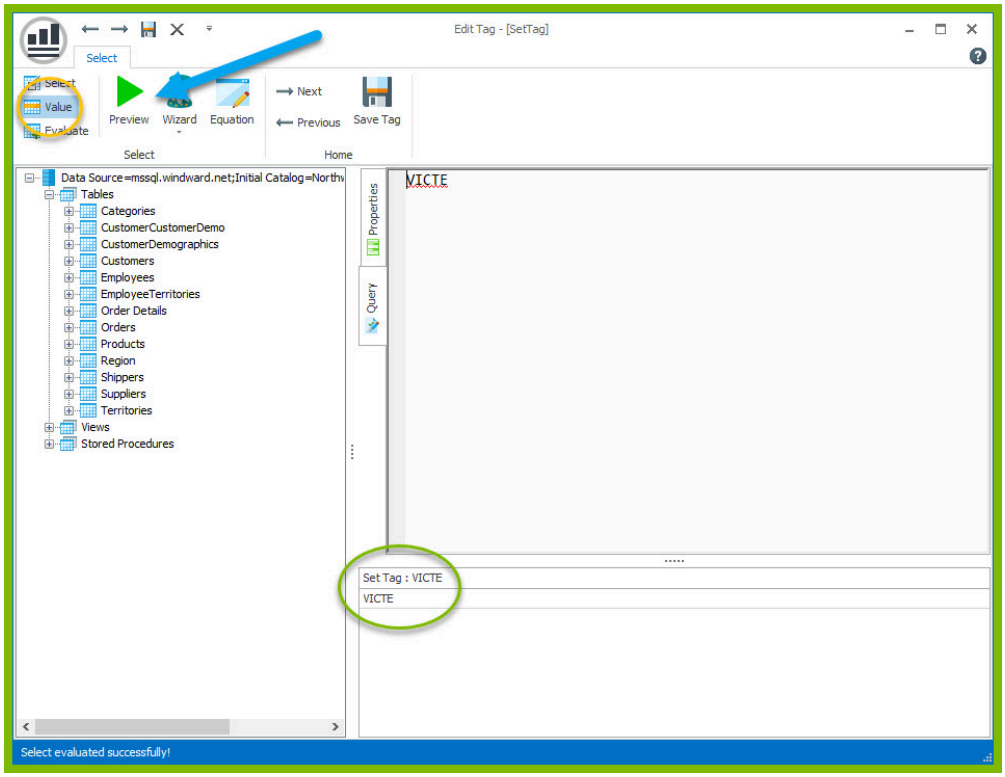
5. Place your cursor on the first line of the document, click Tags to open the Tag drop down, and select the Set tag.



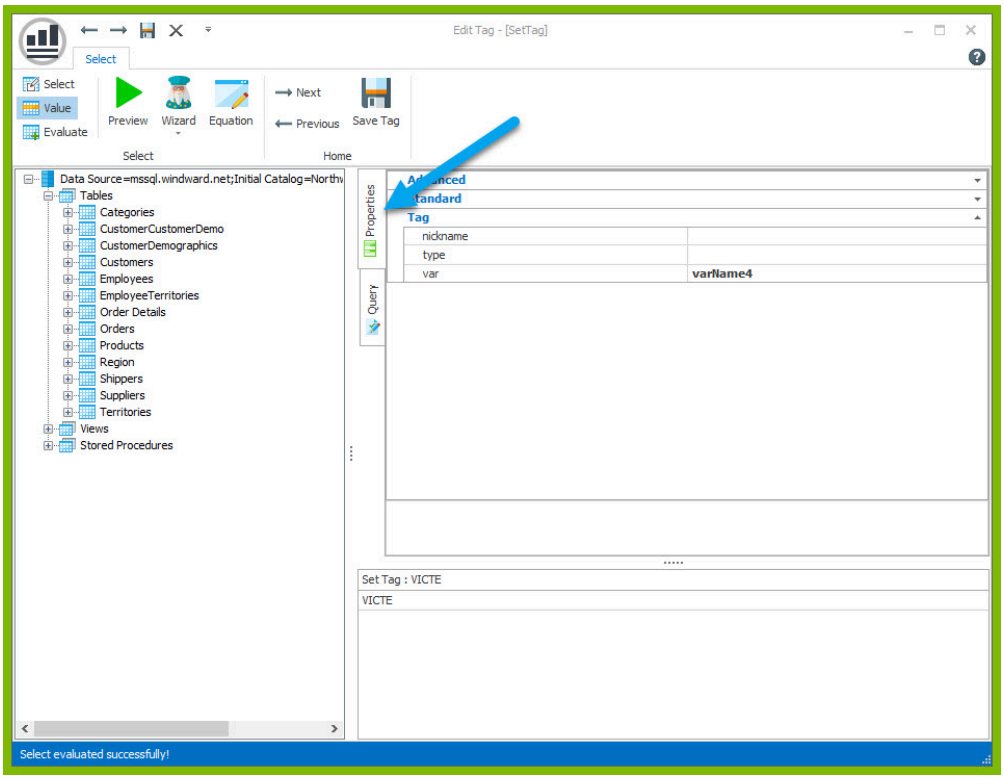
6. Place your cursor on the Set tag in the template and open the Tag Editor by clicking the Edit Tag button.

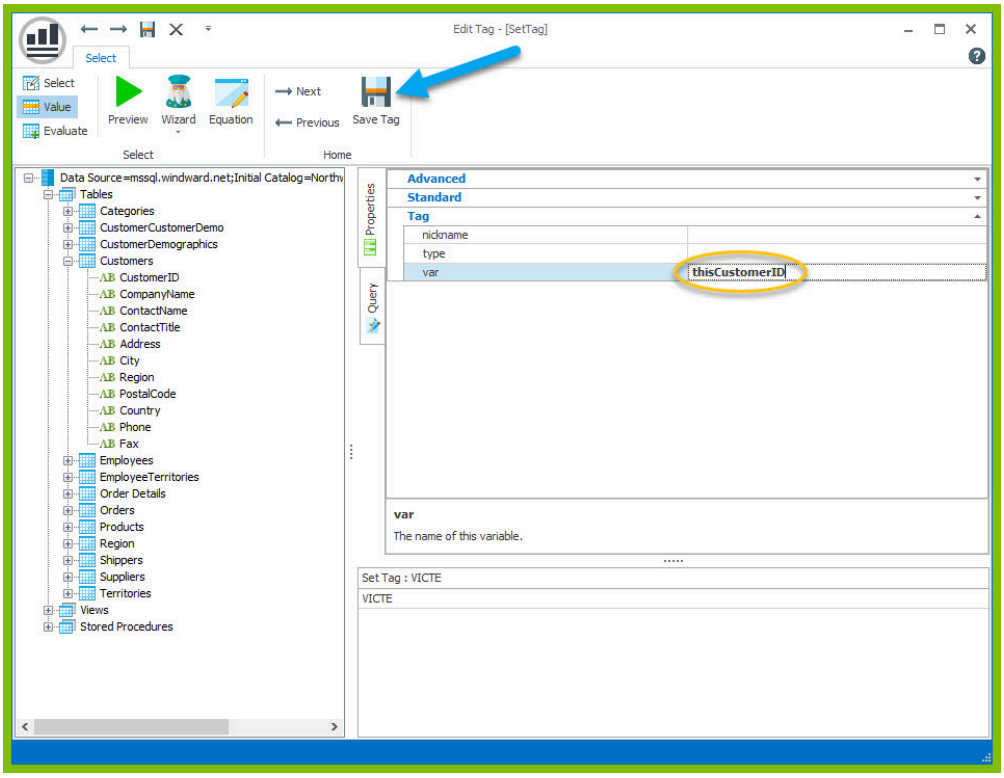


7. In the query pane of the Tag Editor pane, enter the value “VICTE” (no quotes) and click Preview. This value (one of the CustomerIDs in the Customers table) will be used later on to filter our results. If the preview shows the correct value, the tag is set correctly. If the preview is incorrect, or gives an error, make sure you have Value set for that tag in the upper left hand of the Tag Editor.

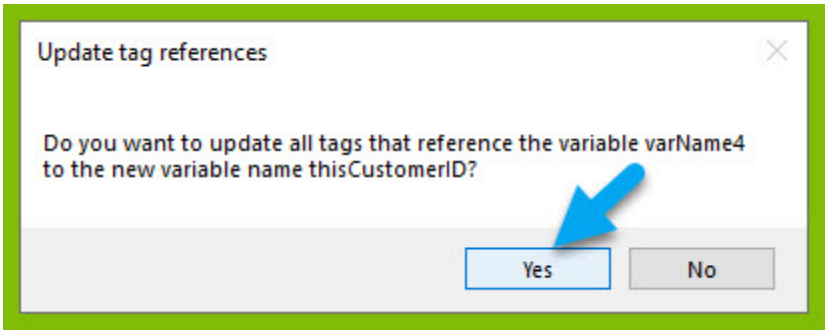


8. To set a variable name for the tag, select the Properties pane in the Tag Editor, and change the var value to “thisCustomerID”. Click the Save Tag button.

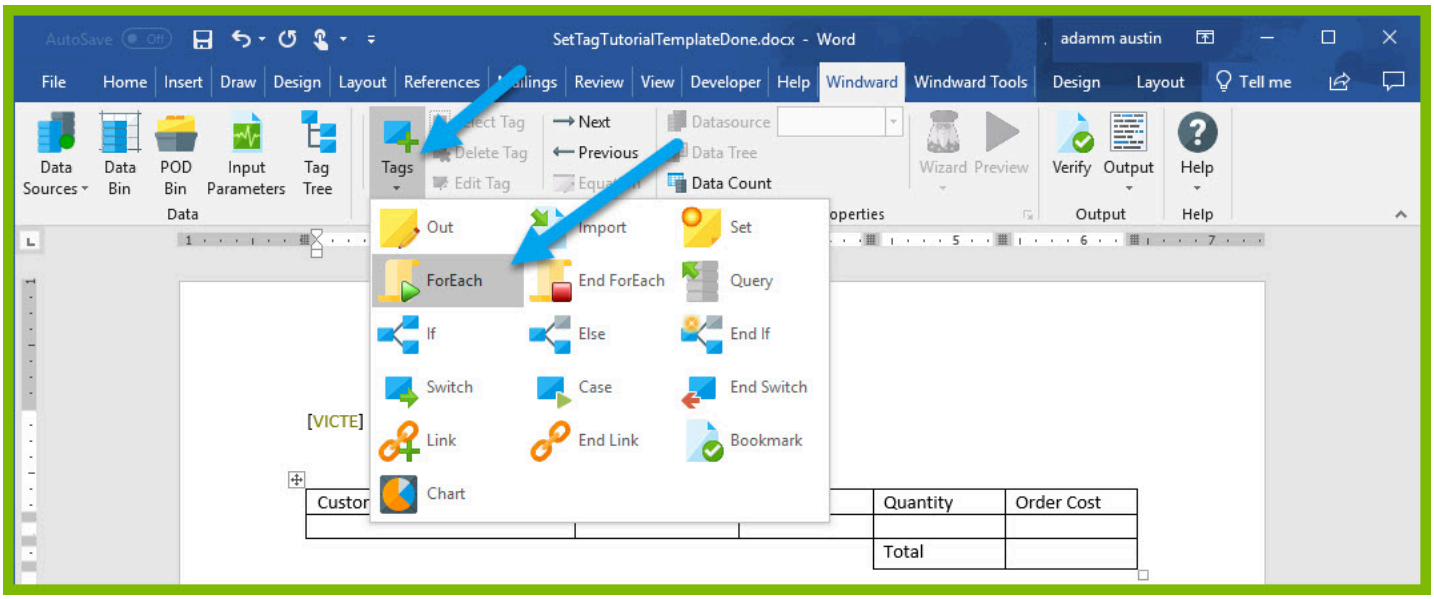




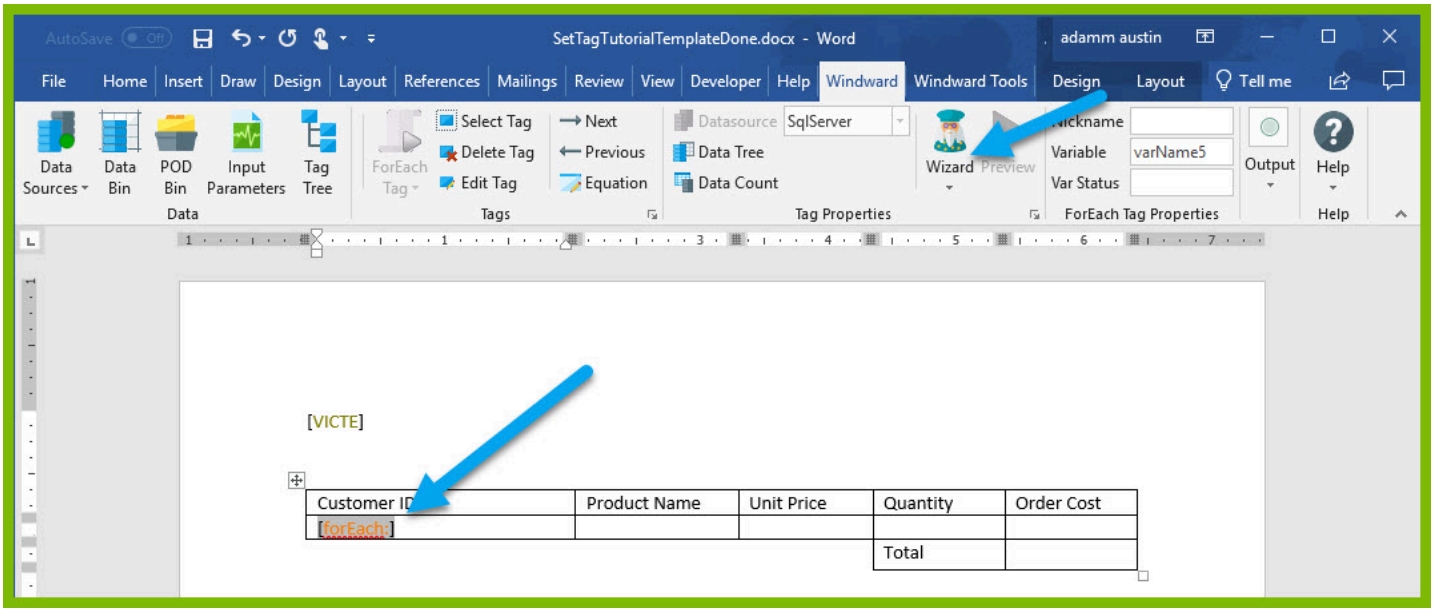
9. In the “Update tag references” dialog, click Yes.



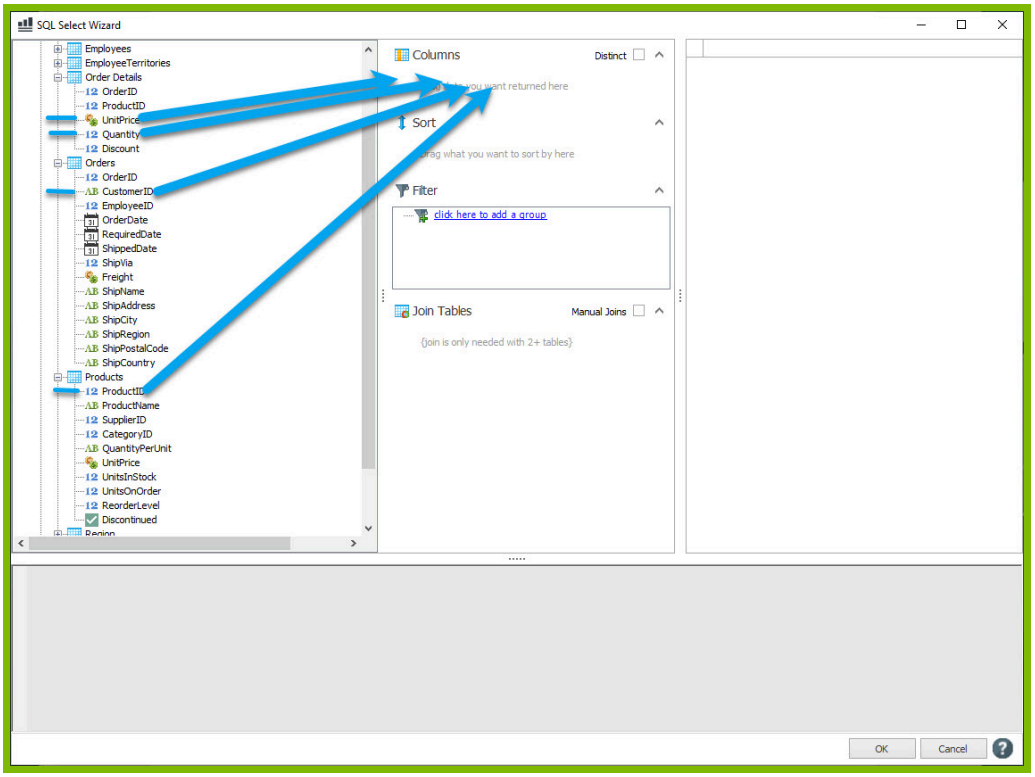
10. In the cell under “Customer ID,” insert a ForEach tag.

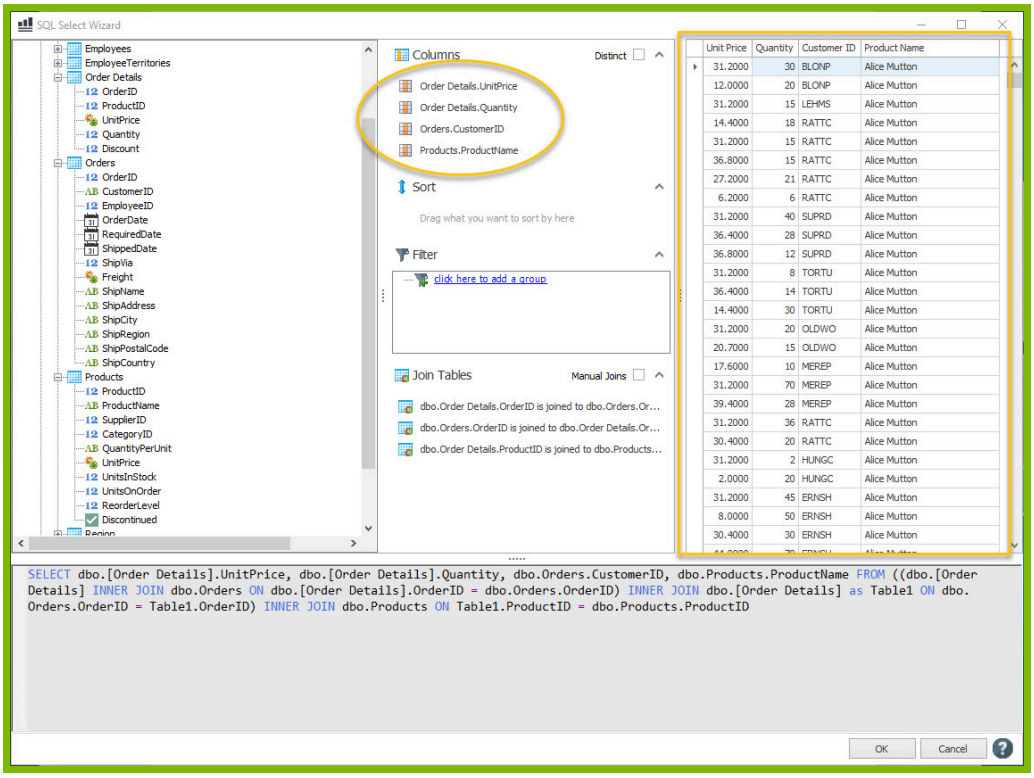


11. Place your cursor on the ForEach tag in the template and click the Wizard button to open the SQL Wizard.



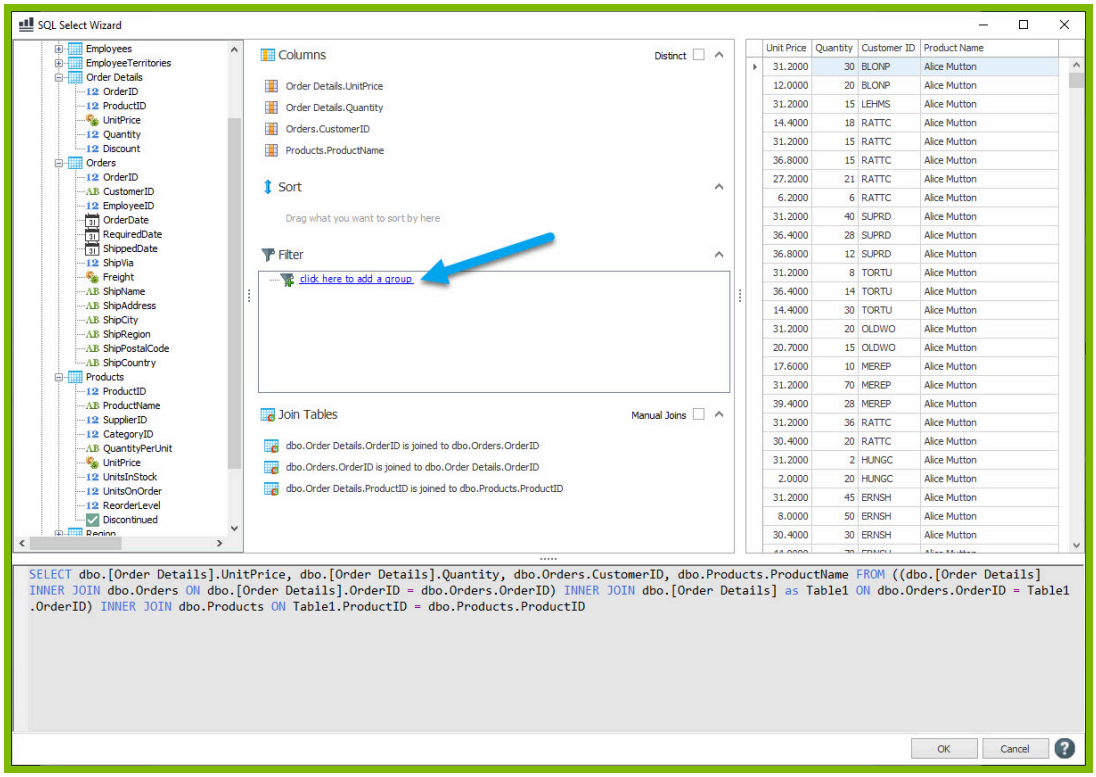
12. In the Wizard, drag the 4 columns that you need from the Data Tree into the Columns section. These are the OrderDetails → UnitPrice, OrderDetails → Quantity, Orders → CustomerID, Products → ProductName

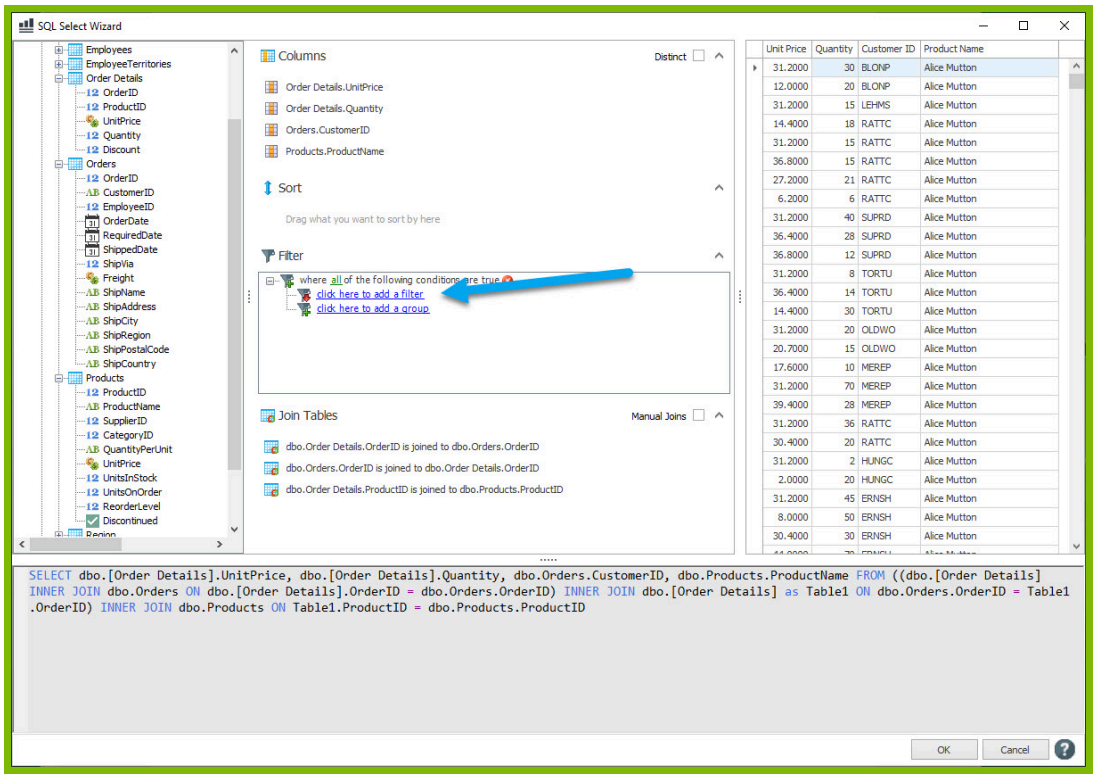




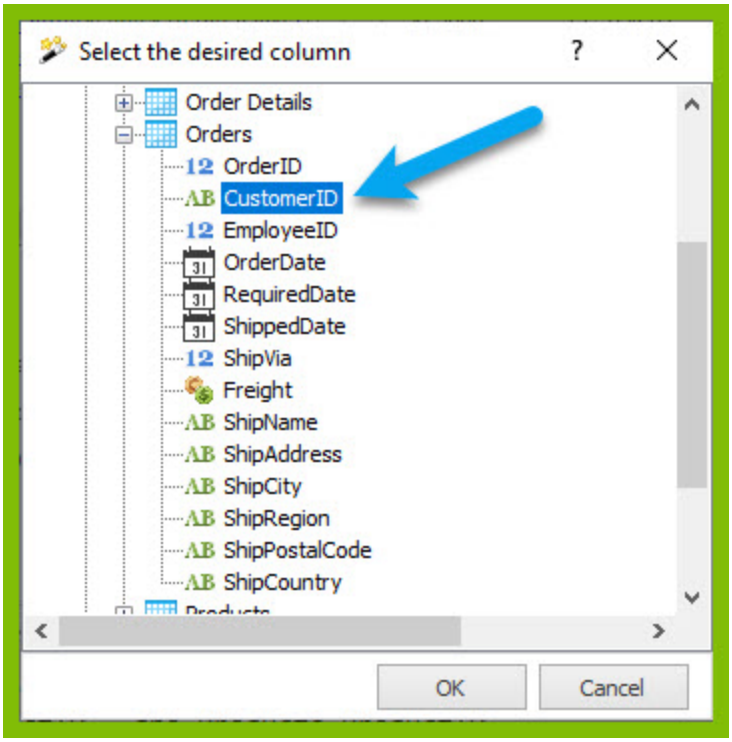
NOTE: We are able to drag columns in from three different tables (Order Details, Orders, and Products) thanks to a structure called a “join” in the SQL query language. While the SQL Wizard takes care of performing the join for you, using data from different tables like this is only possible when the involved tables can be related using a shared column. Here, the Order Details table has a column called OrderID which is the same as the OrderID in the Orders table, and the Order Details table has a column called ProductID which is the same as the ProductID in the Products table.

13. For this template, you only want to see orders for the CustomerID defined earlier. To add a filter, in the Filter section click “click here to add a group” and “click here to add a filter.”

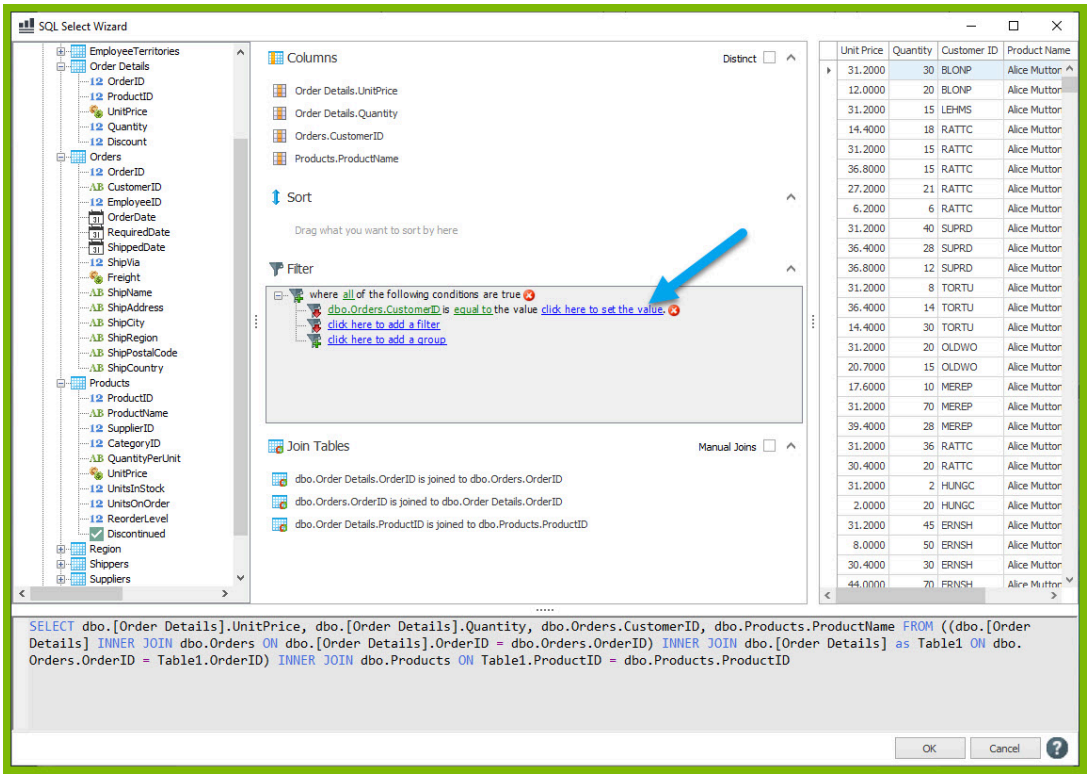


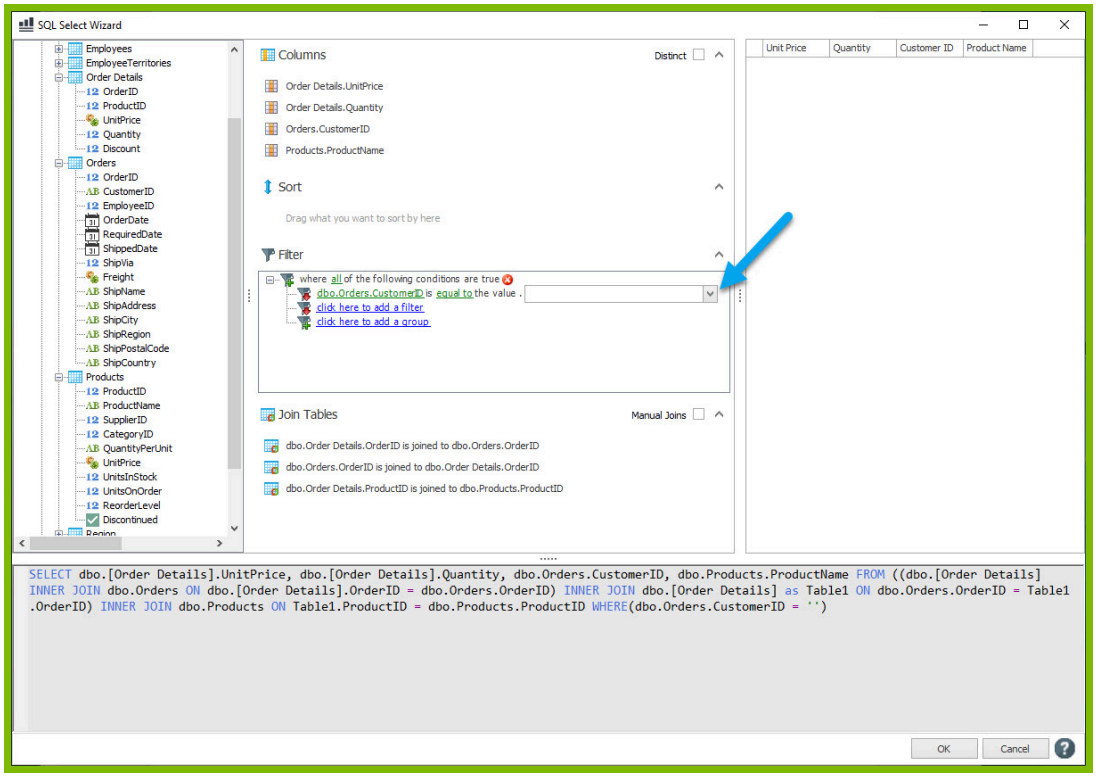


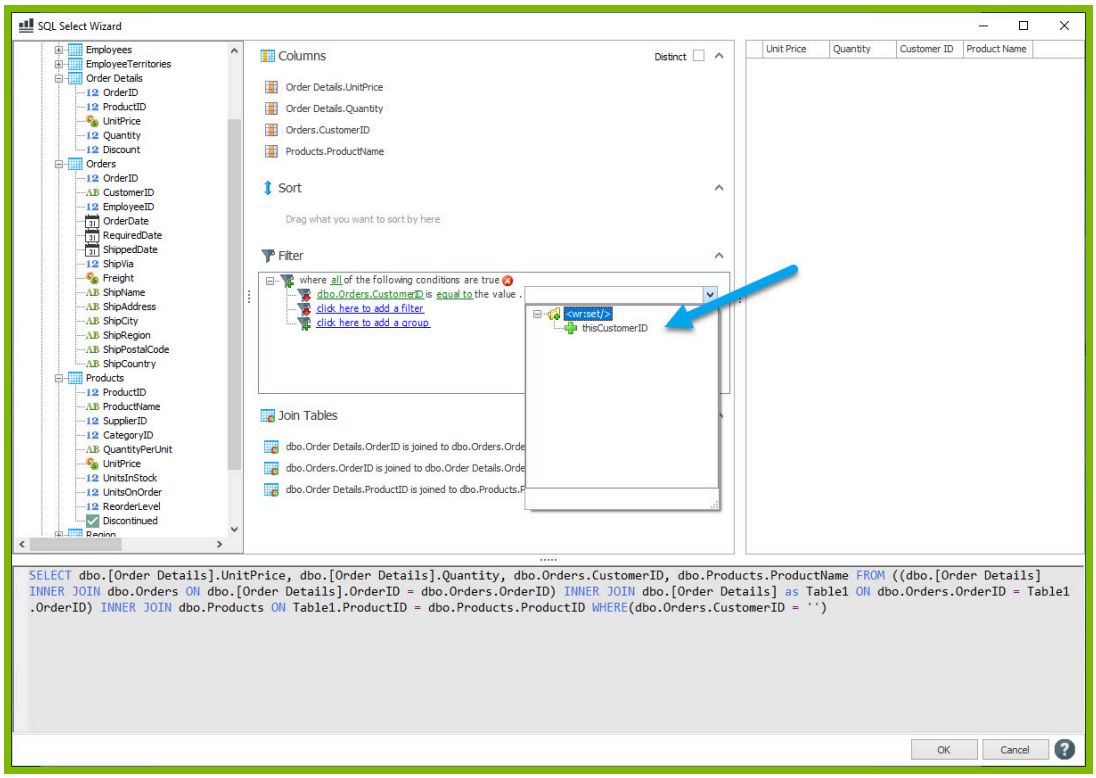
14. Click on “click here to select a node” and from the “Select the desired column” dialog, select the Orders → CustomerID node since you can compare this to the “thisCustomerID” variable defined earlier.



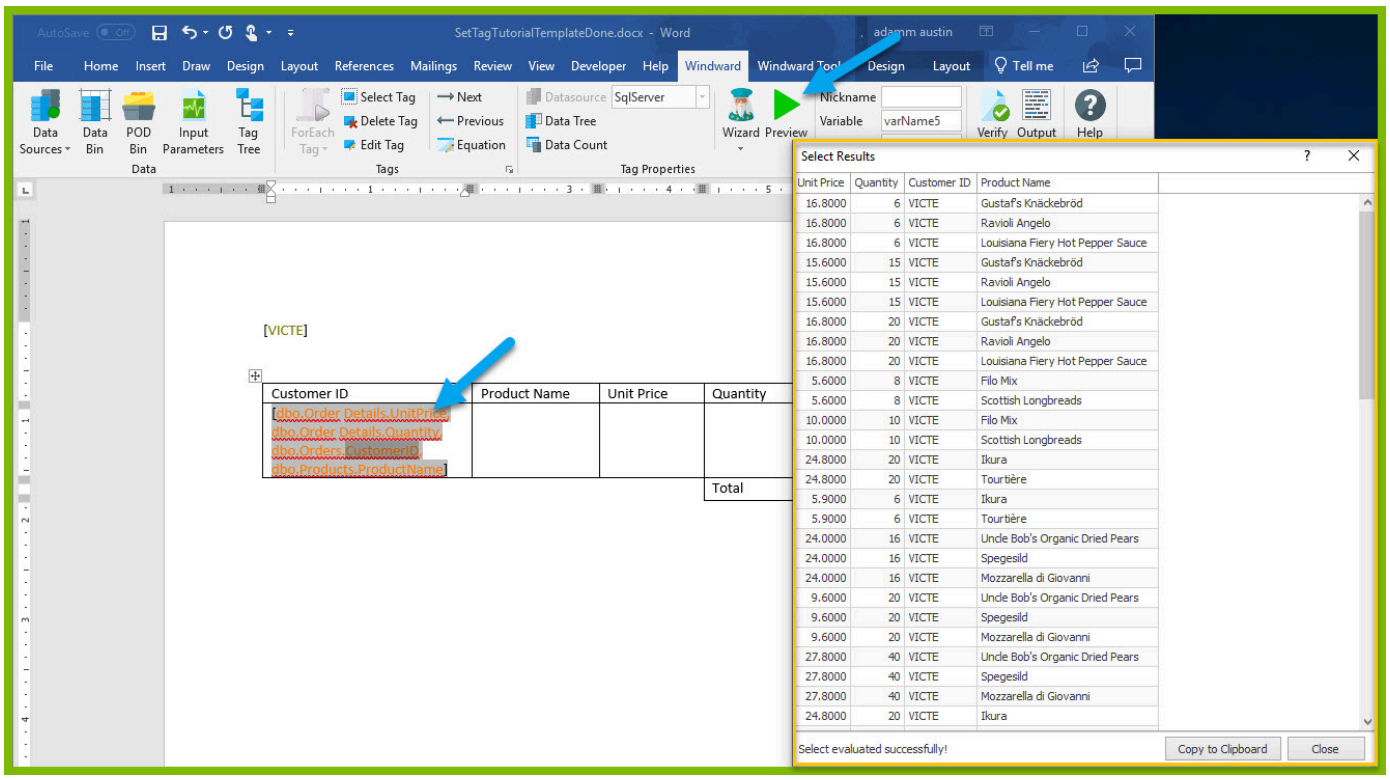
15. To compare the CustomerID column to the “thisCustomerID” variable, click “click here to set the value,” click the down arrow to the side of the text field, and from the drop down of template variables, select “thisCustomerID.”



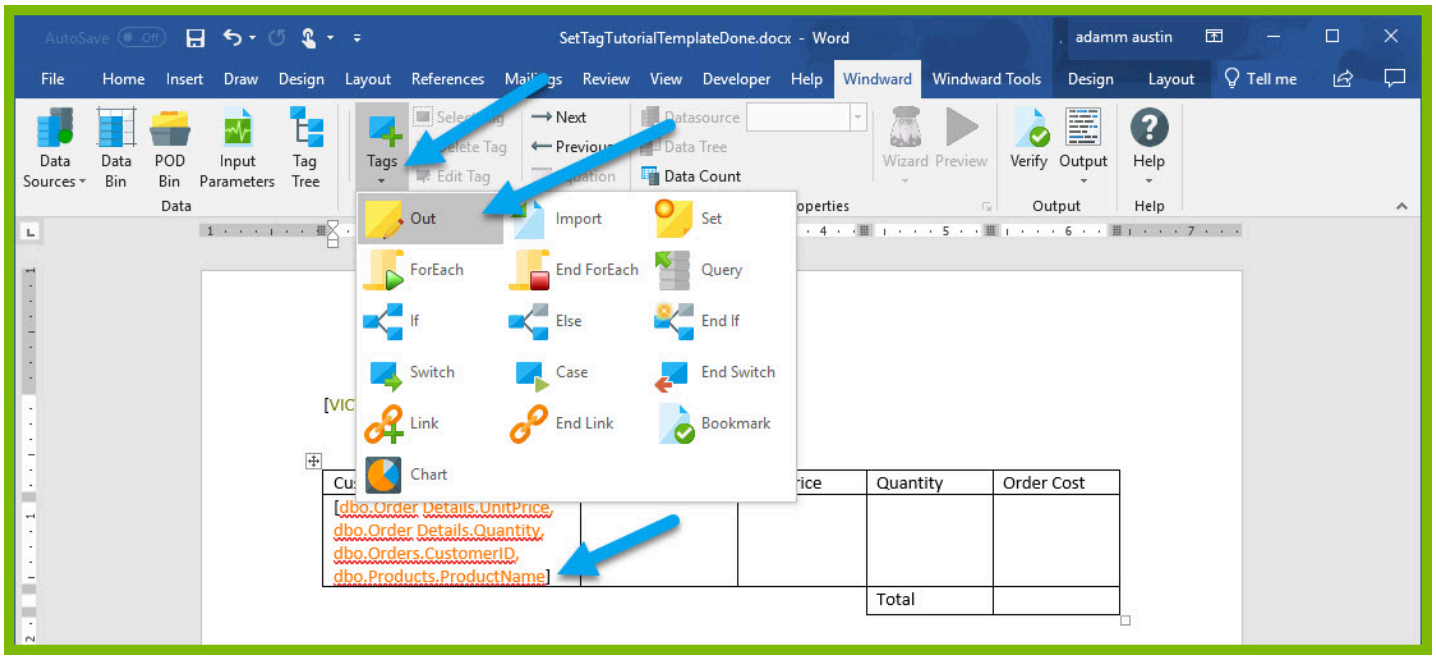




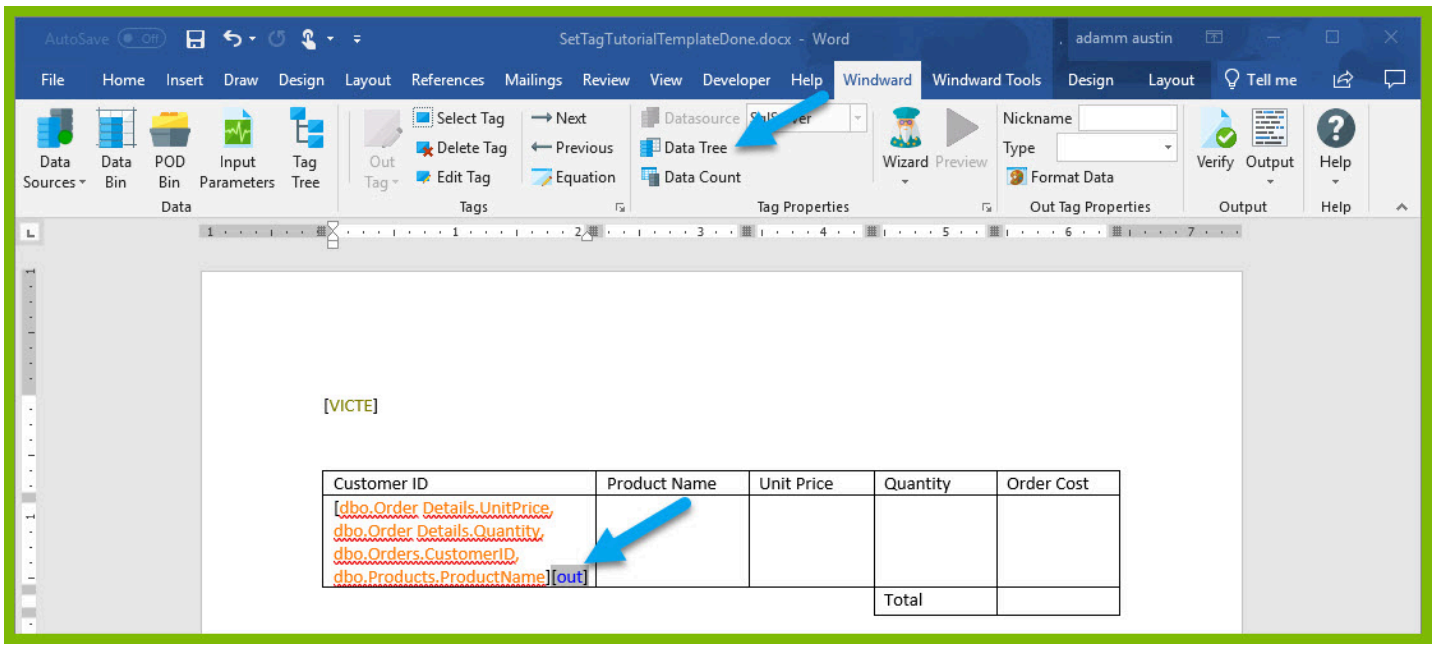
16. In the template, place your cursor on the ForEach tag and click Preview. You should see each of the 4 columns you selected in the preview, and you should only see rows that match the CustomerID “VICTE“.



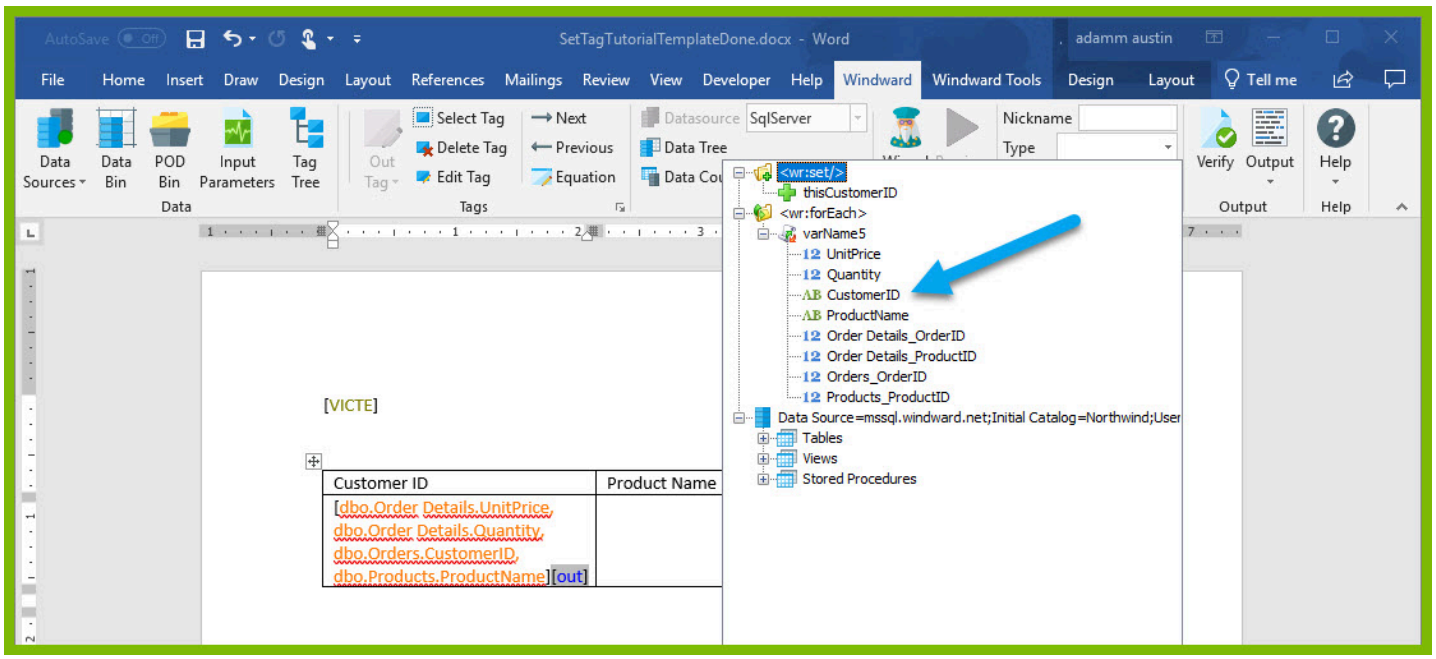
17. Next, add an out tag in the first column after our ForEach tag placing your cursor after the ForEach tag and clicking Tags → Out.



18. Place your cursor on the Out tag, and open the Data Tree from the Tag Properties section. The Data Tree is a quick way to assign a select to a tag in your template.

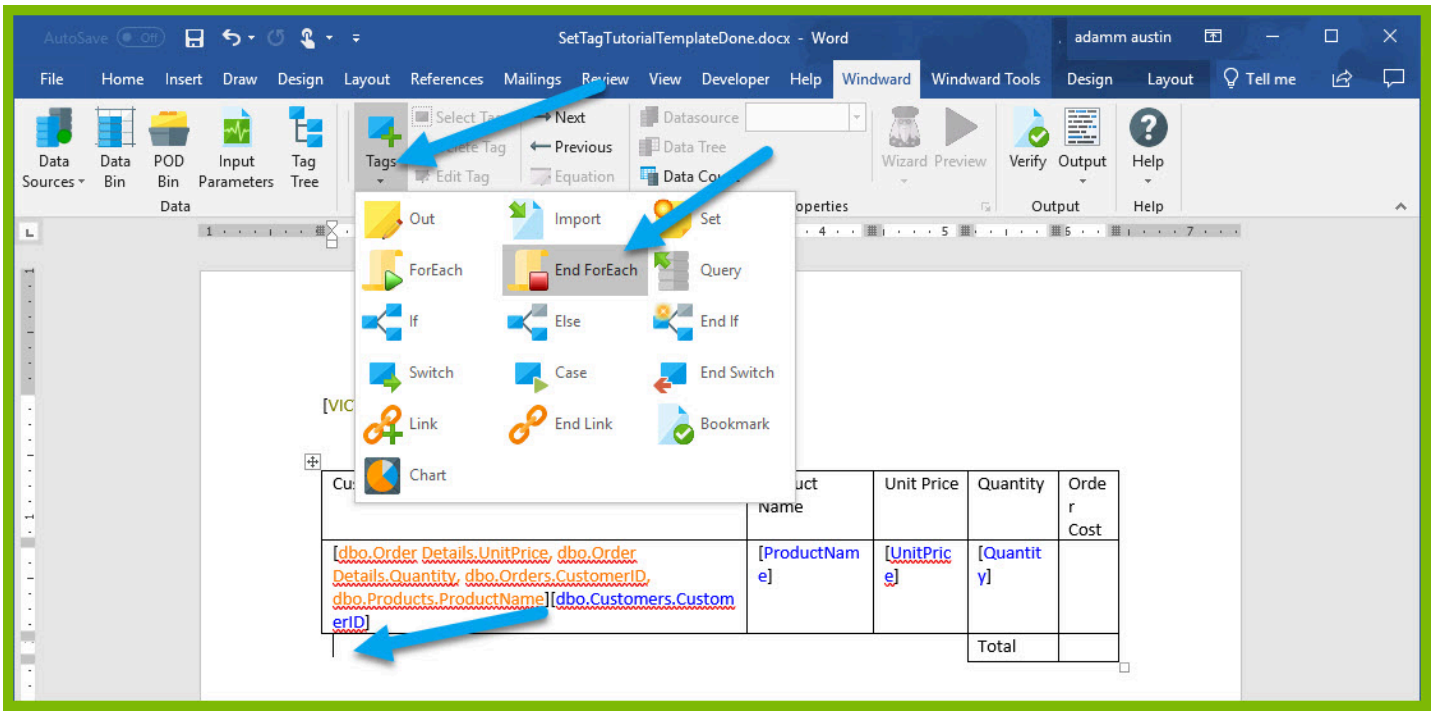


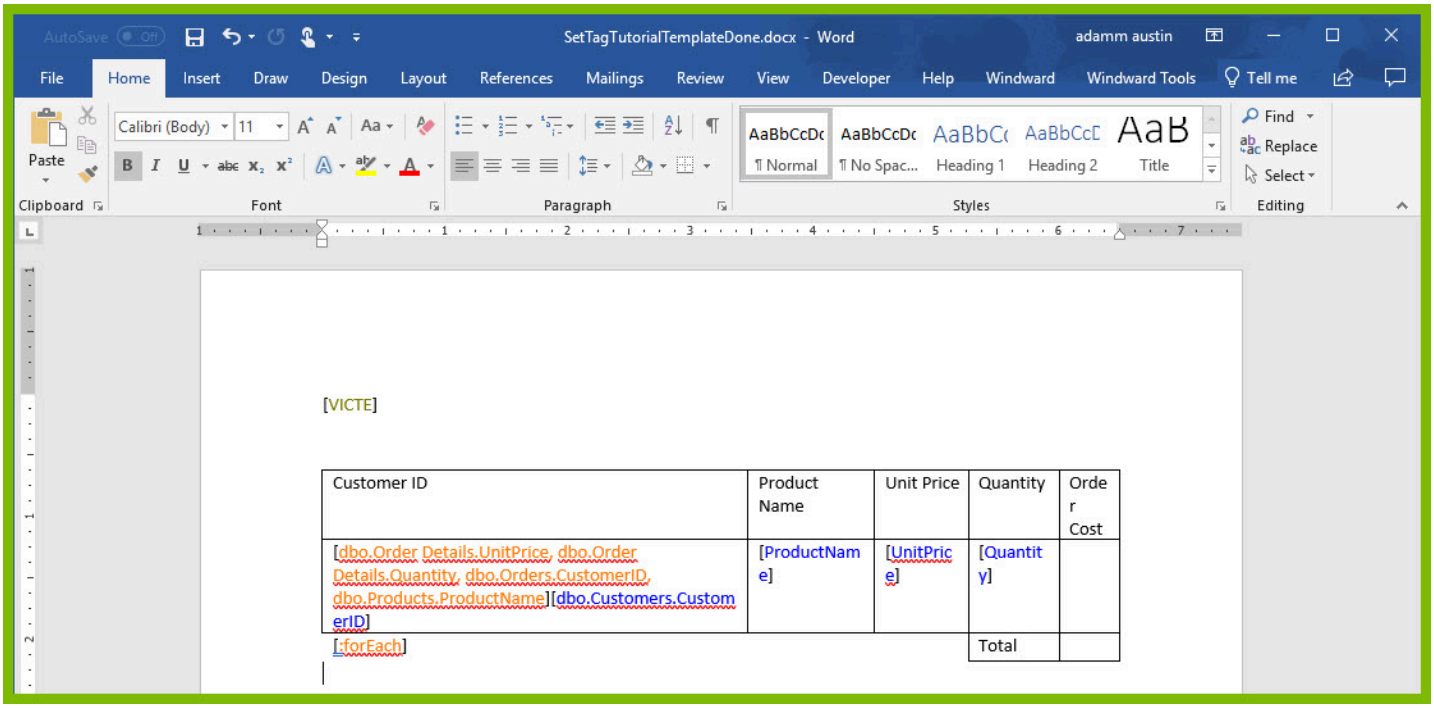
19. From the Data Tree, select the node CustomerID under your ForEach variable.



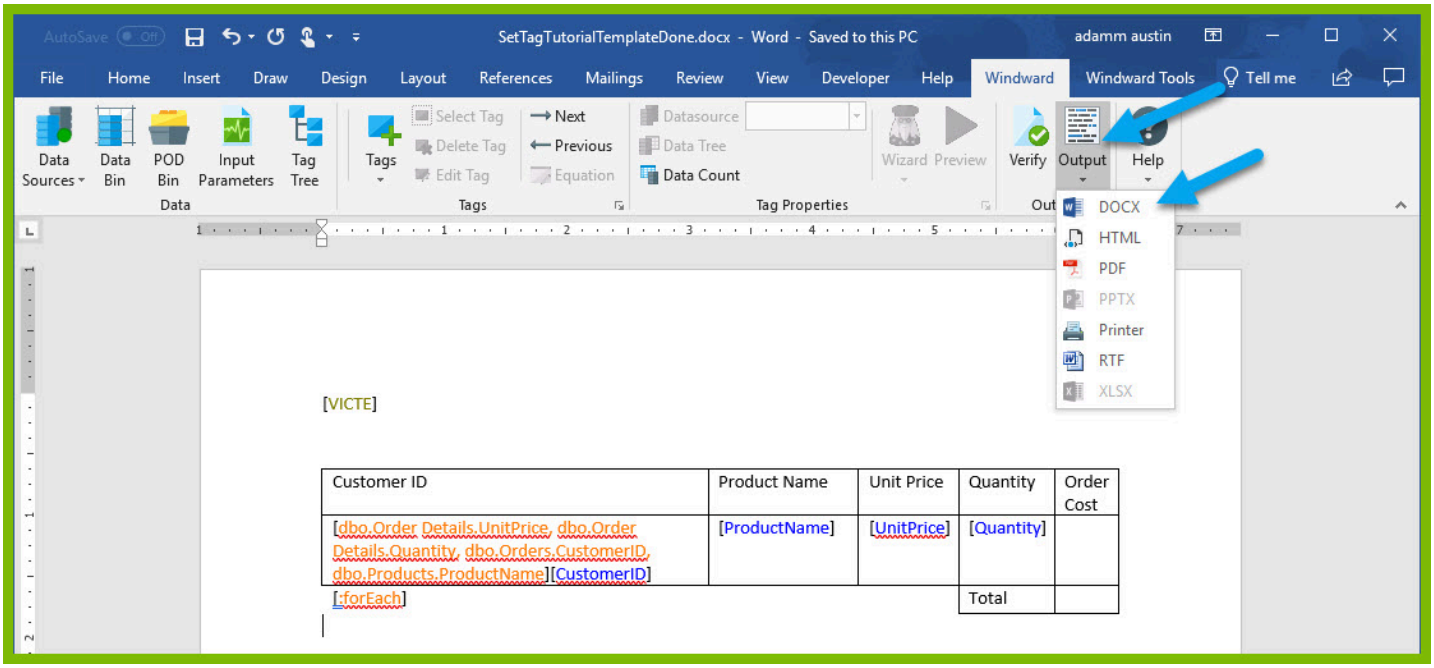
20. Place Out tags in columns Product Name, Unit Price, and Quantity, and repeat the steps above to give your Out tags selects on the nodes ProductName, UnitPrice, and Quantity respectively.

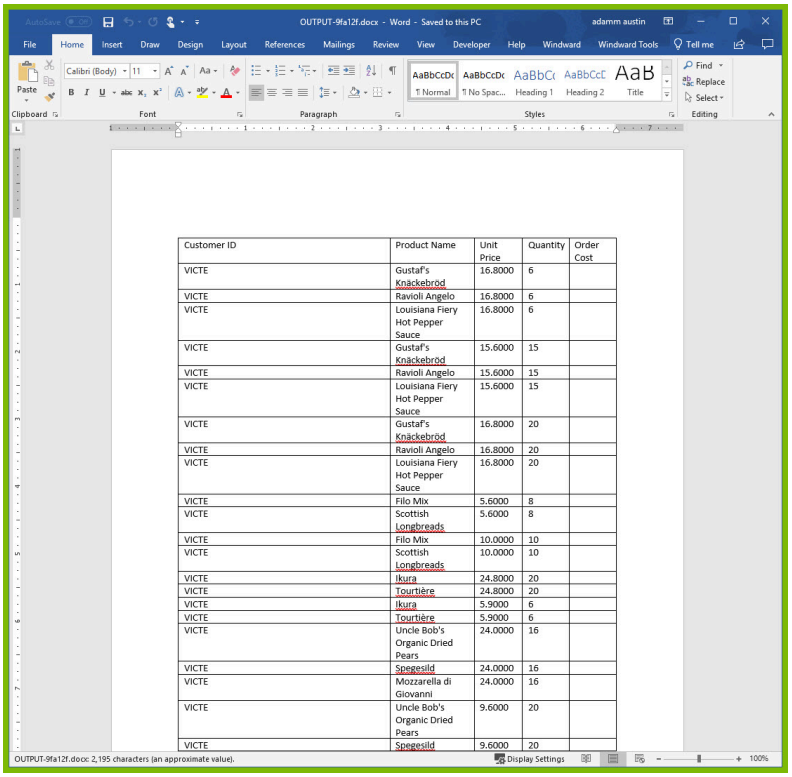
21. Before you proceed, add an EndForEach tag and try outputting your template to make sure you are on track. Place your cursor in the second second row of the table under the Customer ID column. (The first three columns of this row have no borders to improve the aesthetic design).



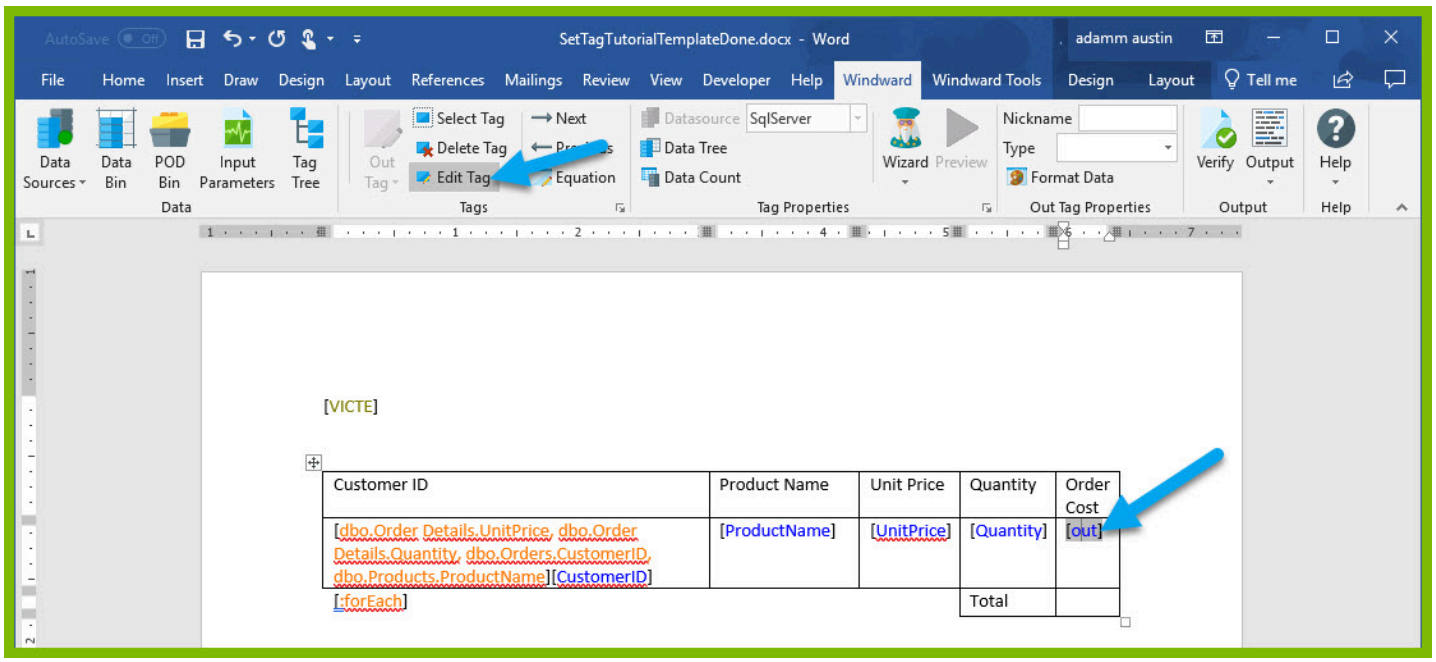


22. Click Output → DOCX to output to a DOCX format and you will get an output report of all of the orders from the Customer ID “VICTE” as well as the Product Name, Unit Price, and Quantity in the order.

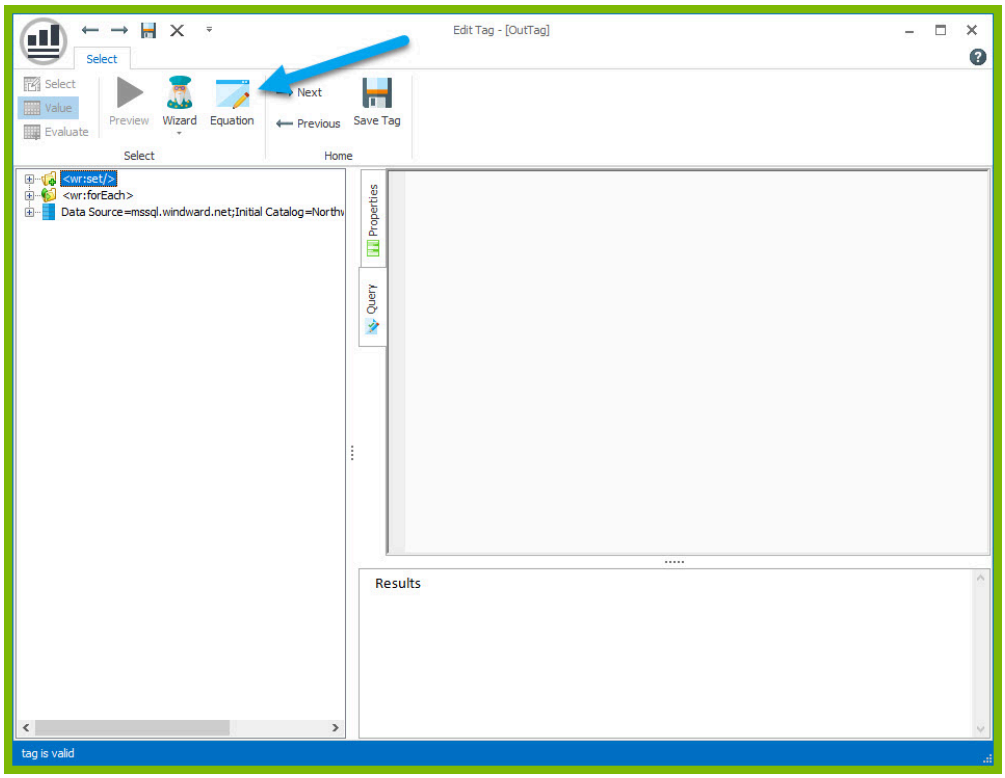




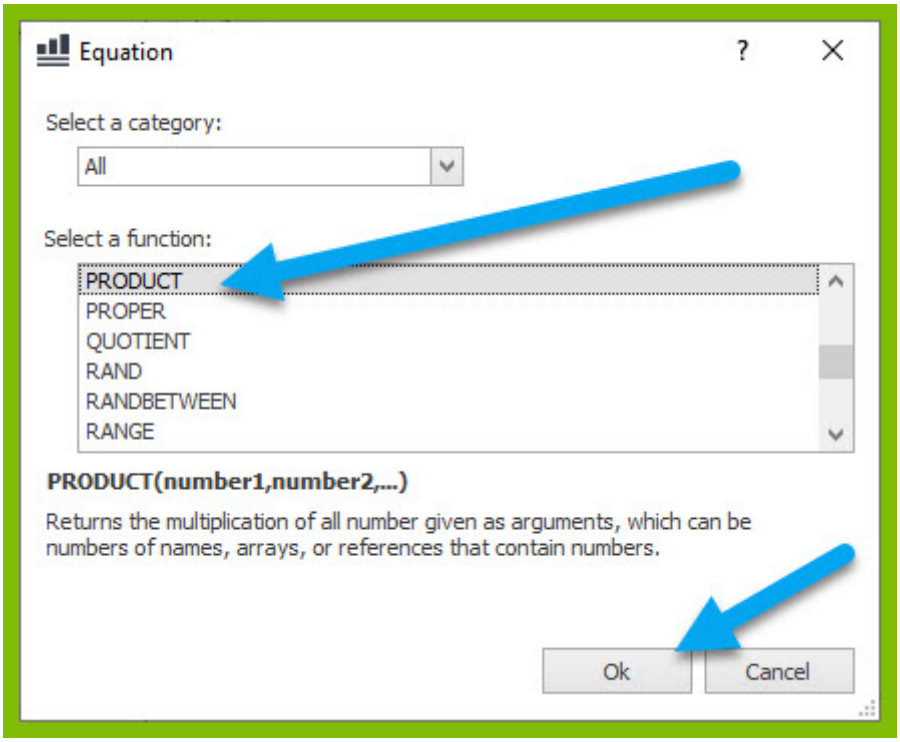
23. Now our goal is to output the Order Cost for any one Order. (This will be the product of Unit Price and Quantity). Go back to your template and place a new OutTag in the first row of the Order Cost column and open the Tag Editor for the Out tag by clicking the “Edit Tag” button.



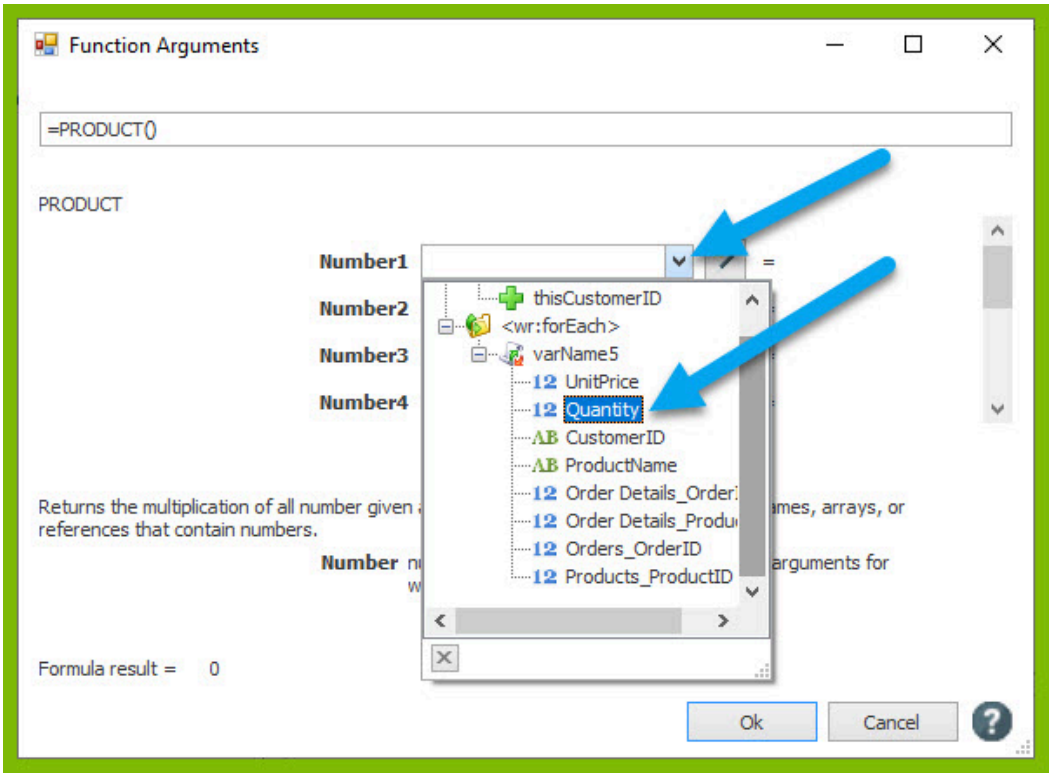
24. In the Tag Editor, you can take the product of our two variables using an equation. Click the Equation button in the Tag Editor.



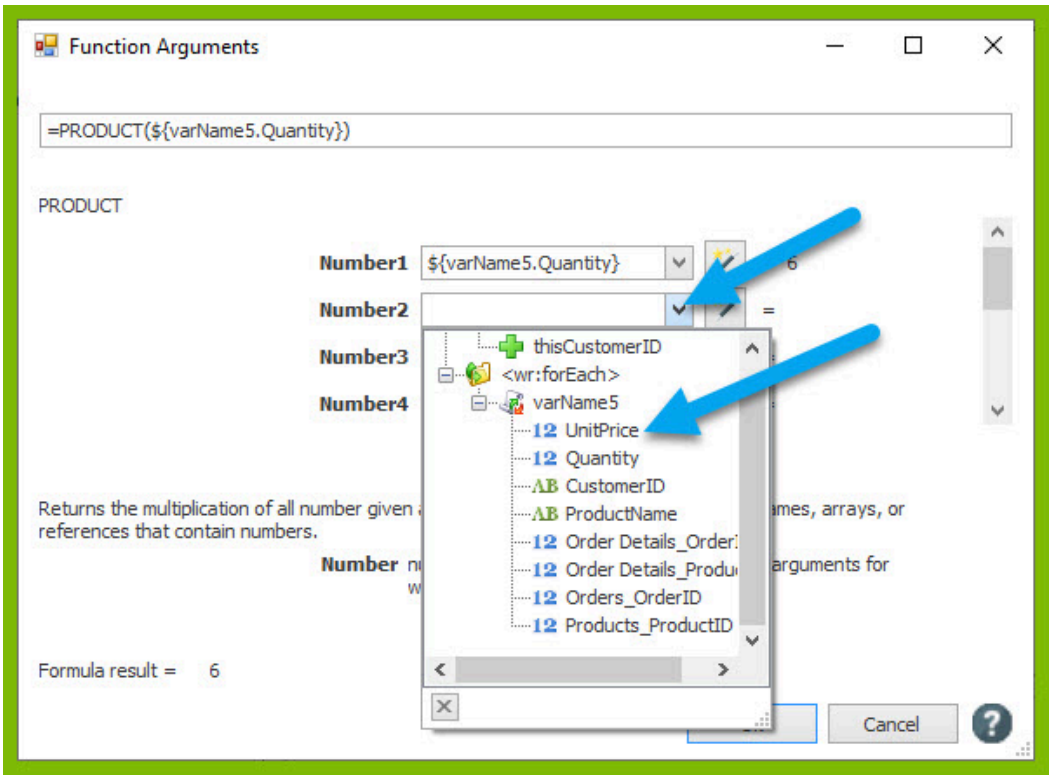
25. In the Equation dialog, find the PRODUCT equation. This will allow you to take the product of your two template variables. Select the PRODUCT equation and click OK.



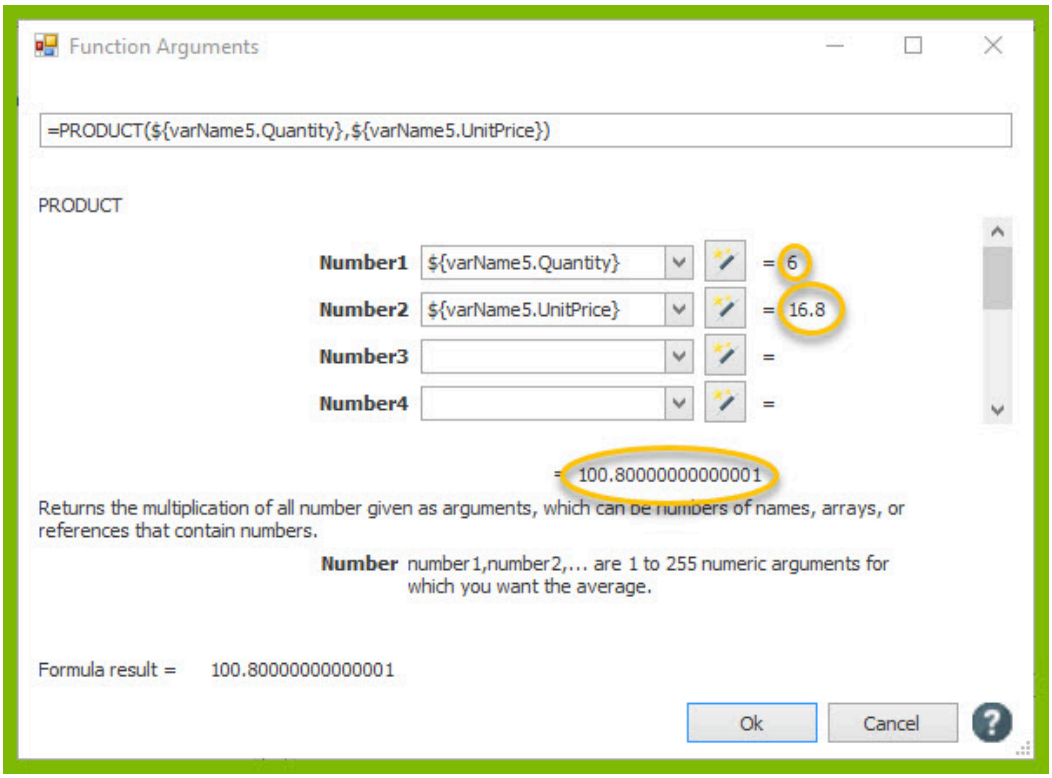
26. In the Function Arguments dialog, you can define the numbers you want to multiply. Use the down arrow to select from your Template Variables. Expand the drop down for Number1, and double click “Quantity.”



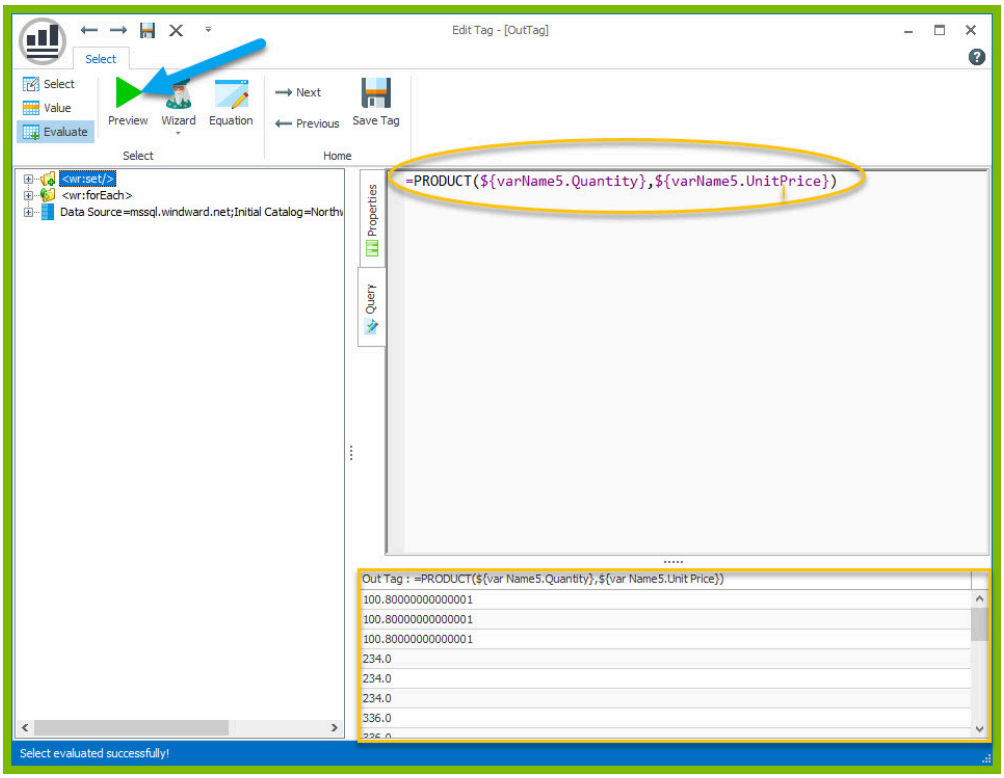
27. Expand the drop down for Number2, and double click “UnitPrice.”



28. You can preview the result of your product in the Function Arguments dialog to make sure it looks as you expect.

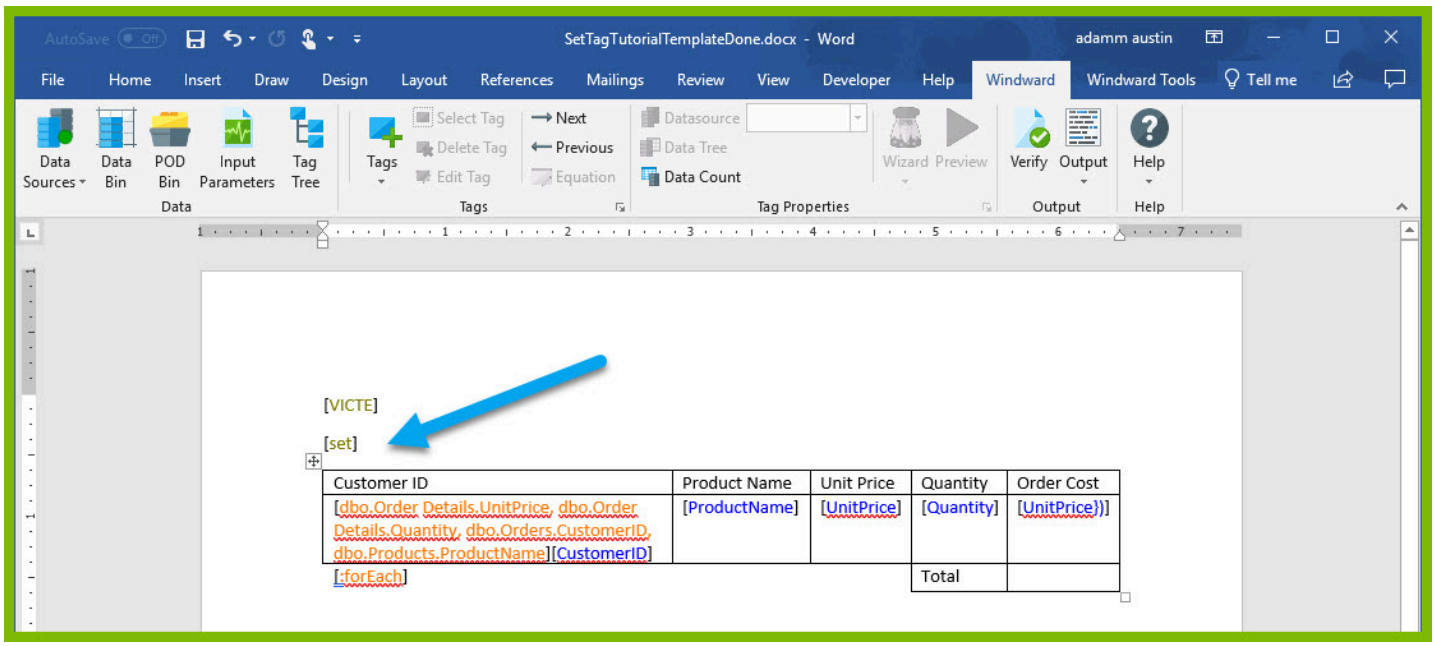


29. Click OK to close the Function Arguments dialog. You will see the equation you created appear in the query pane of the Tag Editor, and previewing will show the result of the equation you made.



30. Save your tag.

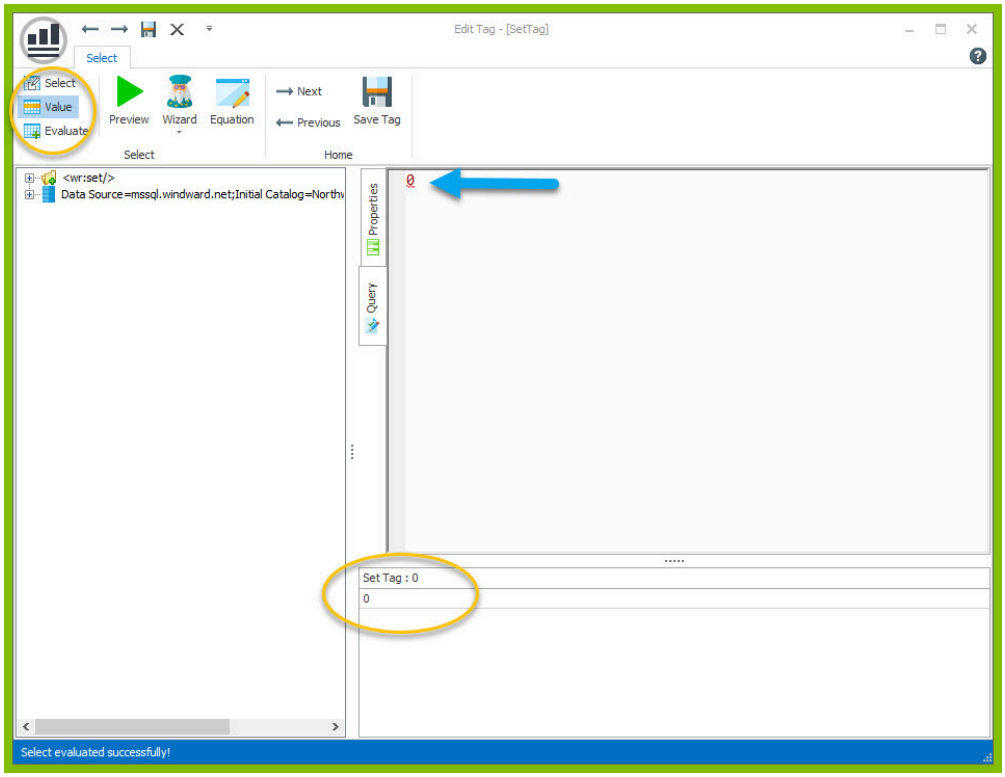
31. Now your challenge is to display the total cost of all orders by the customer in the “Total” row of your table. You can achieve this by declaring a template variable outside of the table, and then add to this template variable for each Order Cost you calculate in the table. The first step is to declare our template variable outside of the table using a Set tag. Place a Set tag on the second line of the template.



32. Place your cursor on the Set tag, and open the Tag Editor by clicking “Edit Tag”

33. Specify the initial value of the Set tag by entering 0 into the query pane.

34. Preview the tag to be sure it contains the value 0.



To set a variable name for the tag, select the Properties pane in the Tag Editor, and change the var value to “totalOrdersCost”. Click the Save Tag button.

36. Now that you have a template variable to contain the total, we need to add the order cost calculated for each order to the “totalOrdersCost” variable. We can re-use the value output by our Order Cost Out tag by assigning a variable name to the Out tag, and then using the Out variable in our sum. Open the Out tag in the Order Cost column in the Tag Editor.

37. In the “Update tag references” dialog, click Yes to update all references to the variable name in the document.

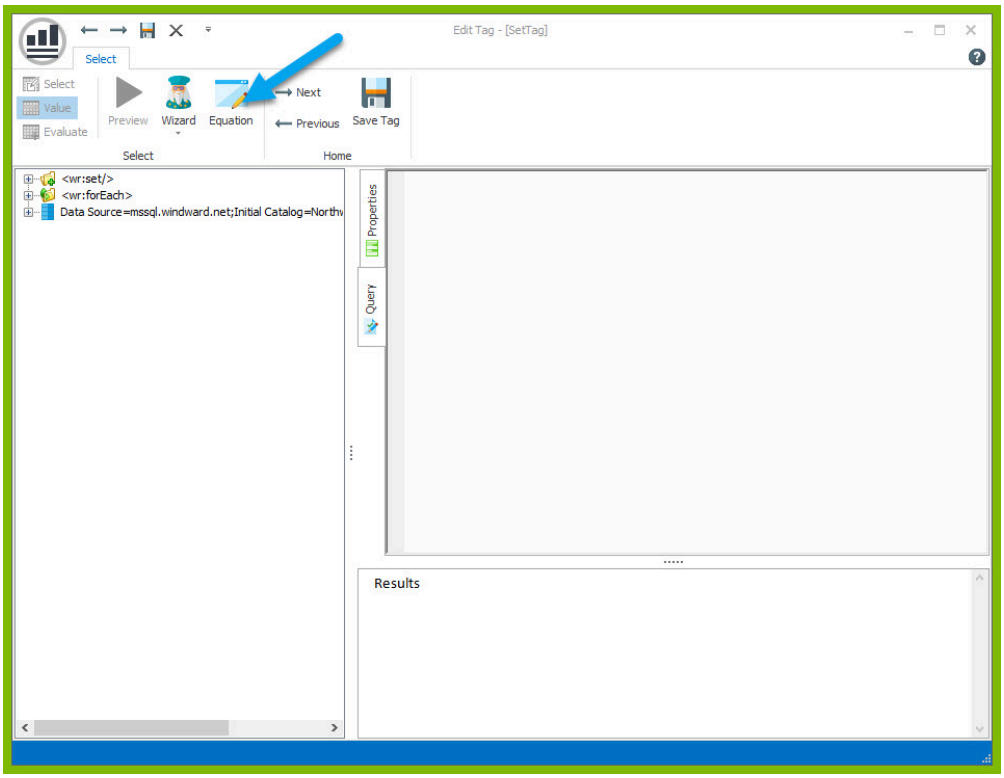
38. To set a variable name for the tag, select the Properties pane in the Tag Editor, and change the var value to “currentOrderCost”. Click the Save Tag button.

39. In the “Update tag references” dialog, click Yes to update all references to the variable name in the document.

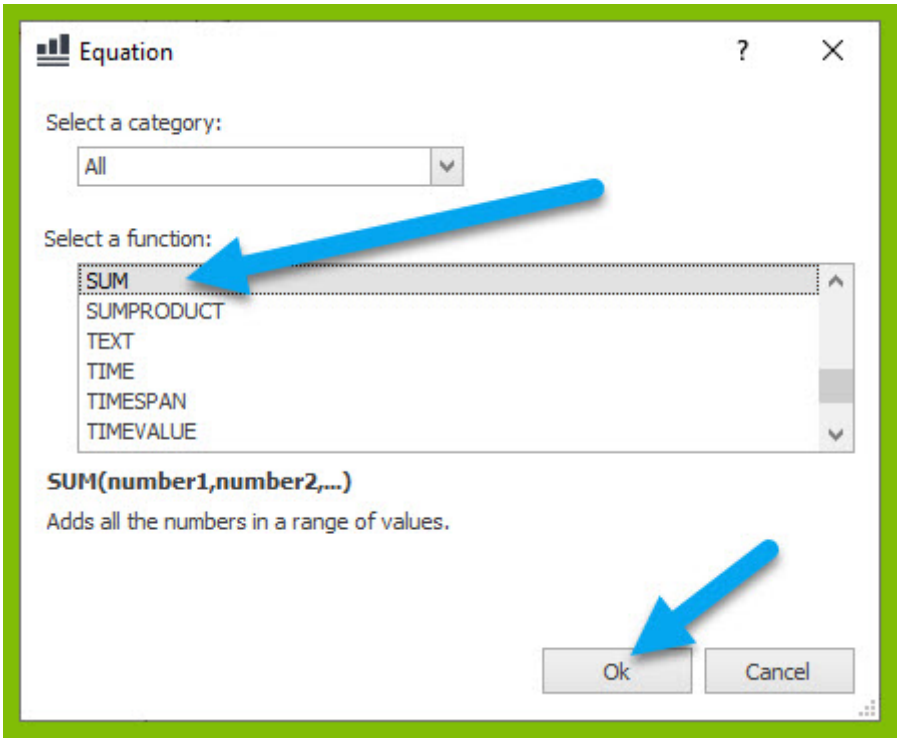
40. Place a Set tag in the same cell after the Out tag in the Order Cost column and open the Tag Editor for the Set tag.

41. To update the value of the template variable, we will need to give this Set tag the same variable name as our template variable to hold the total orders cost. To set a variable name for the tag, select the Properties pane in the Tag Editor, and change the var value to “totalOrdersCost”.

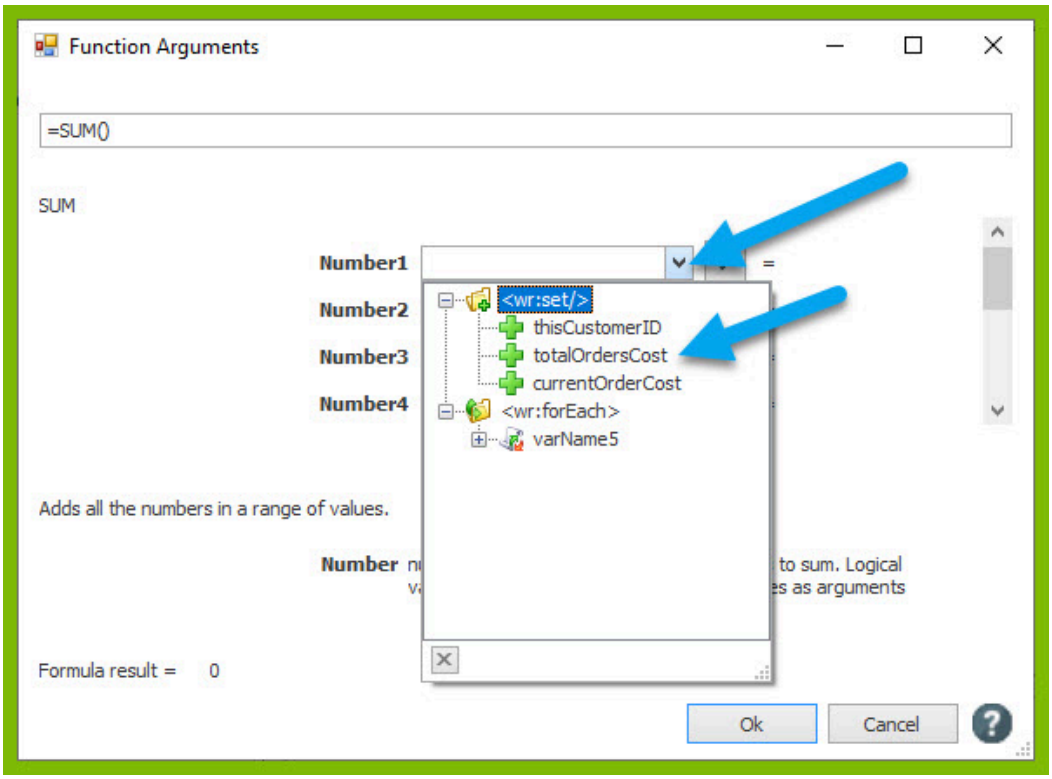
42. Now you must give the tag a select that will sum the existing currentOrderCost with the totalOrdersCost. You can do this with an equation like you calculated the product earlier. Click the Equation button in the Tag Editor.

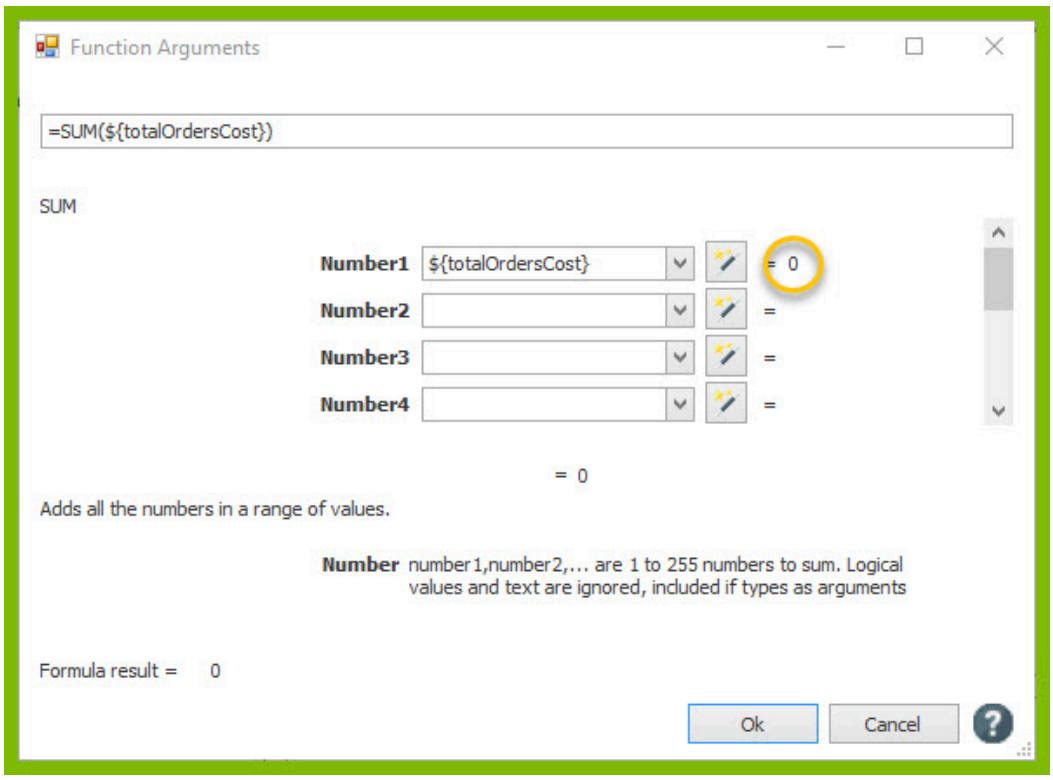


43. In the Equation dialog, find the SUM equation. This will allow you to add up the total of your two template variables. Select the SUM equation and click OK.

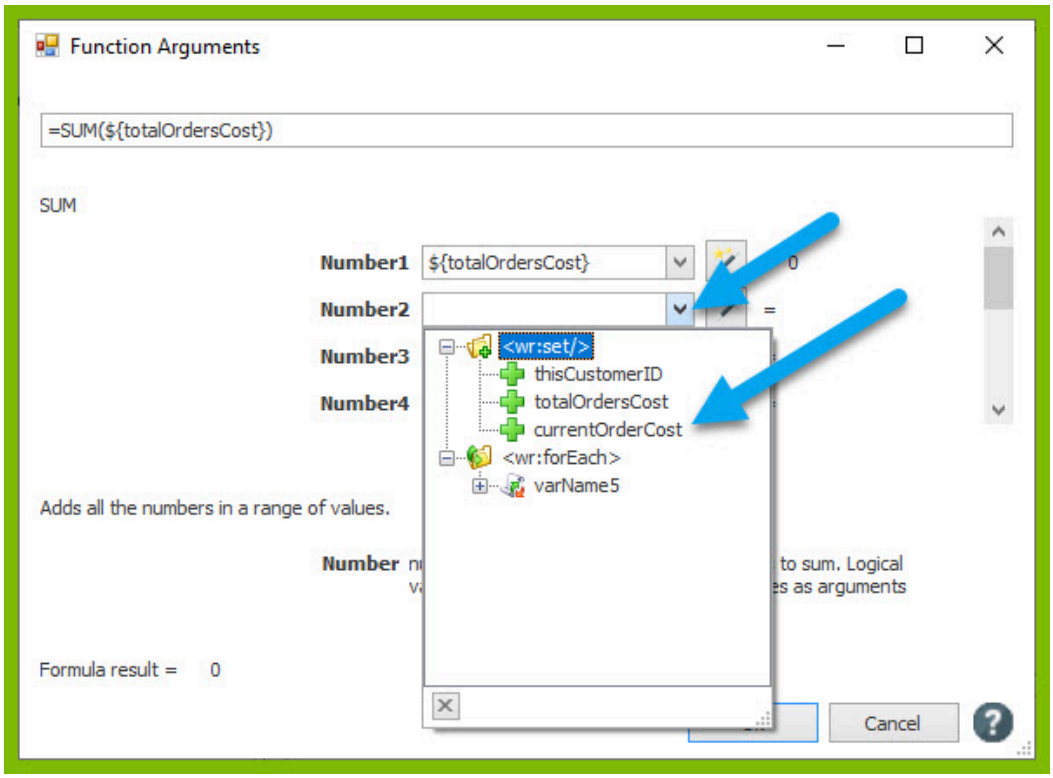


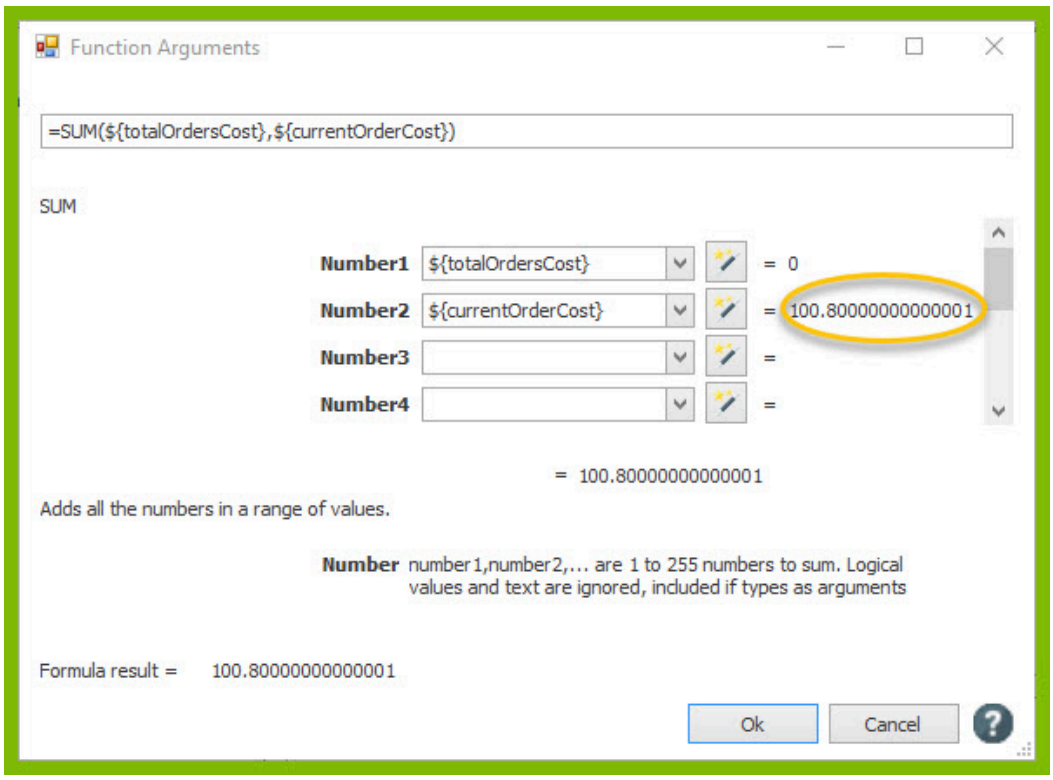
44. In the Function Arguments dialog, you can define the numbers you want to add. Use the down arrow to select from your Template Variables. Expand the drop down for Number1, and double click “totalOrdersCost”. This is the Set tag variable that will hold the total across all orders. Notice after you select it, that the previewed value is 0. This is the value the variable was initialized to in the Set tag.



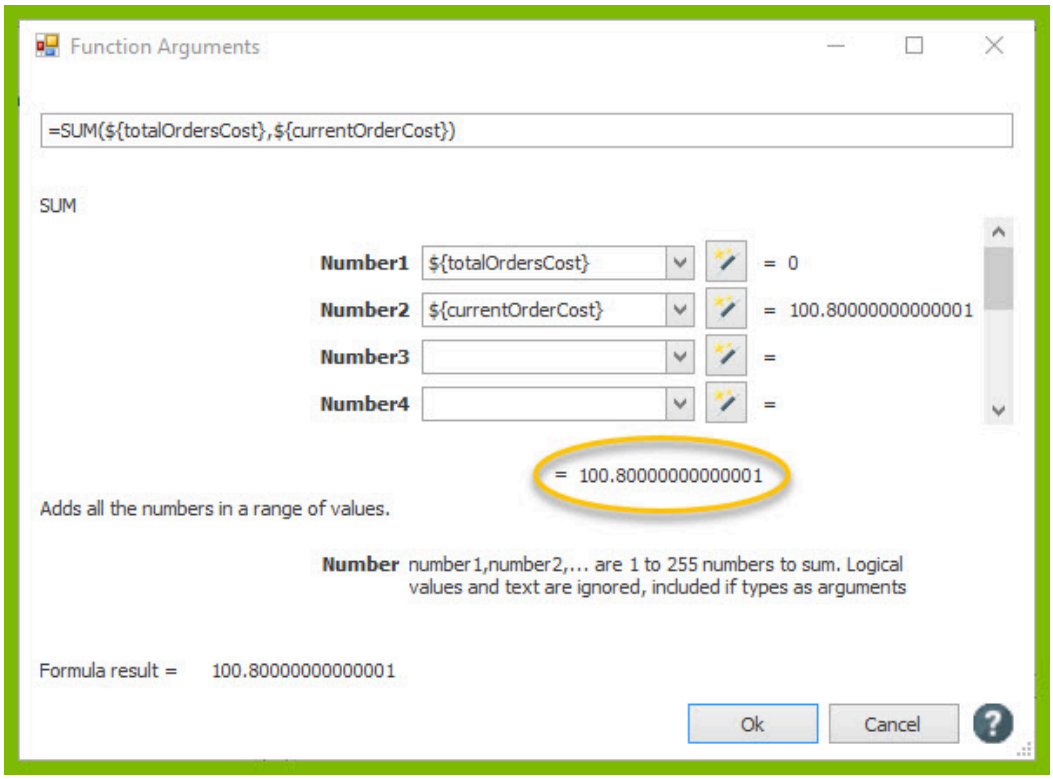


45. Expand the drop down for Number2, and double click “currentOrderCost”. Notice after you select it, that the previewed value is 100.80. This is the first value contained by our Out tag variable after calculating the first product.





46. You can preview the result of your product in the Function Arguments dialog to make sure it looks as you expect.

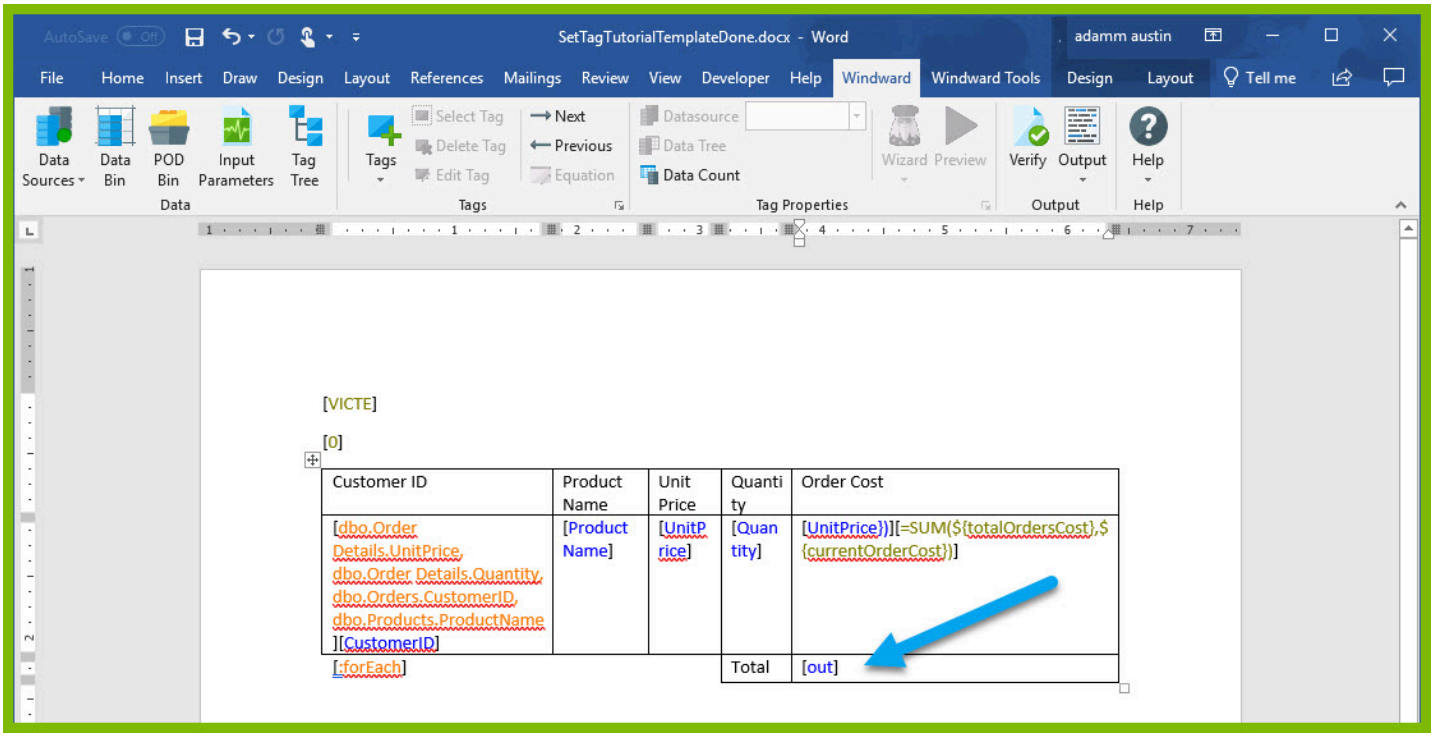


47. Click OK to close the Function Arguments dialog. You will see the equation you created appear in the query pane of the Tag Editor, and previewing will show the result of the equation you made.

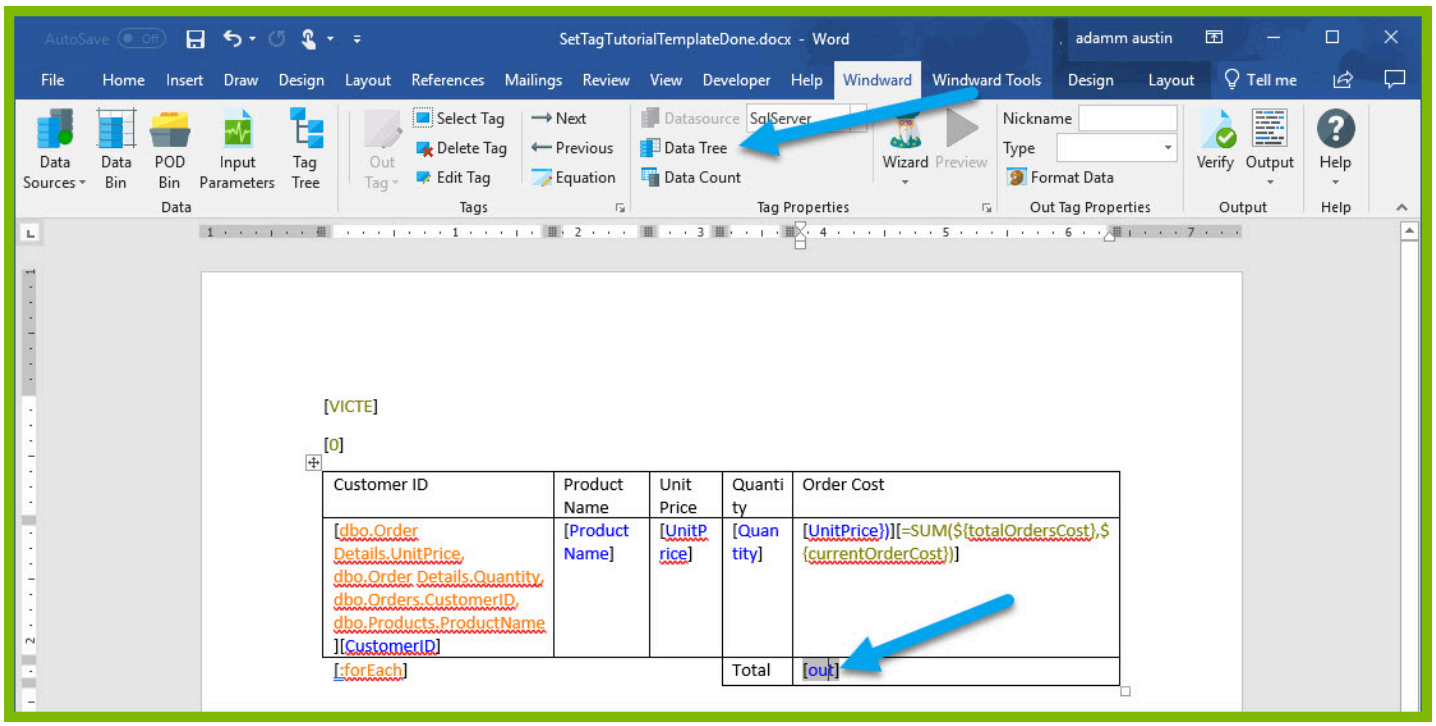
48. Click Save Tag to save your tag.

49. In the “Update tag references” dialog, click Yes to update all references to the variable name in the document.

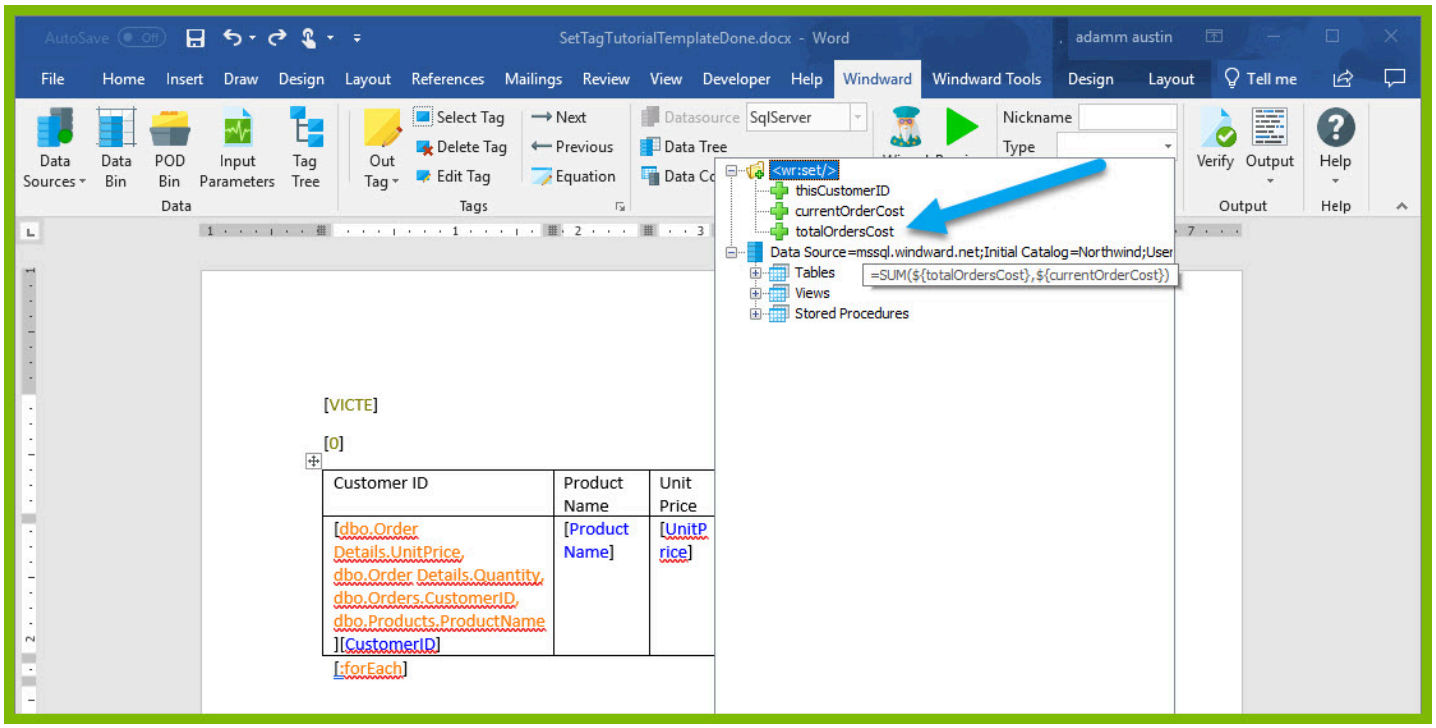
50. Your last step is to add an out tag to output the totalOrdersCost variable after adding the cost of each individual order to the variable. Place an Out tag in the cell to the right of the “Total” cell.



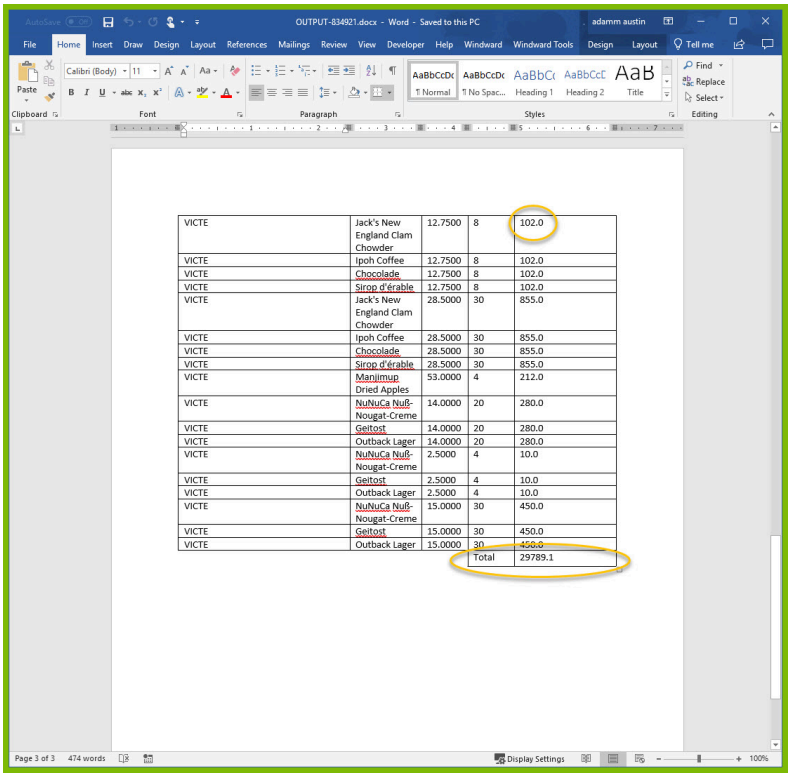
51. Place your cursor on the Out tag, and open the Data Tree from the Tag Properties section.



52. From the Data Tree, select the variable totalOrdersCost under your Set variables.



53. Now you can output your finished template! Click Output → DOCX and view your output template. Your output contains a list of orders, the order quantity, unit price, order cost, and a total cost of all their orders!



VICTE	Jack's New England Clam Chowder	12.7500	8	102.0
VICTE	Ipoh Coffee	12.7500	8	102.0
VICTE	Chocolade	12.7500	8	102.0
VICTE	Sirop d'érable	12.7500	8	102.0
VICTE	Jack's New England Clam Chowder	28.5000	30	855.0
VICTE	Ipoh Coffee	28.5000	30	855.0
VICTE	Chocolade	28.5000	30	855.0
VICTE	Sirop d'érable	28.5000	30	855.0
VICTE	Manjimup Dried Apples	53.0000	4	212.0
VICTE	NuNuCa Nuß-Nougat-Creme	14.0000	20	280.0
VICTE	Geitost	14.0000	20	280.0
VICTE	Outback Lager	14.0000	20	280.0
VICTE	NuNuCa Nuß-Nougat-Creme	2.5000	4	10.0
VICTE	Geitost	2.5000	4	10.0
VICTE	Outback Lager	2.5000	4	10.0
VICTE	NuNuCa Nuß-Nougat-Creme	15.0000	30	450.0
VICTE	Geitost	15.0000	30	450.0
VICTE	Outback Lager	15.0000	30	450.0
			Total	29789.1

Now that you have finished this introduction tutorial, here are some resources we recommend you visit next:

1. How to connect to XML datasources
2. How to use the XPath Wizard
3. The Windward Tutor: A collection of short video tutorials

3: If Tag Tutorial

Prerequisite Tutorials

Before doing this tutorial, we recommend you have done...

1. The Start Here Tutorial

Training Overview

This Training Guide walks you through the fundamentals to understand and use the If, Else and EndIf tags.

1. What do If, Else and EndIf Tags do?
2. Connect to Data
3. Design and fill a table template using ForEach
4. Analyzing the Output

Step 1- What do If, Else and EndIf Tags do?

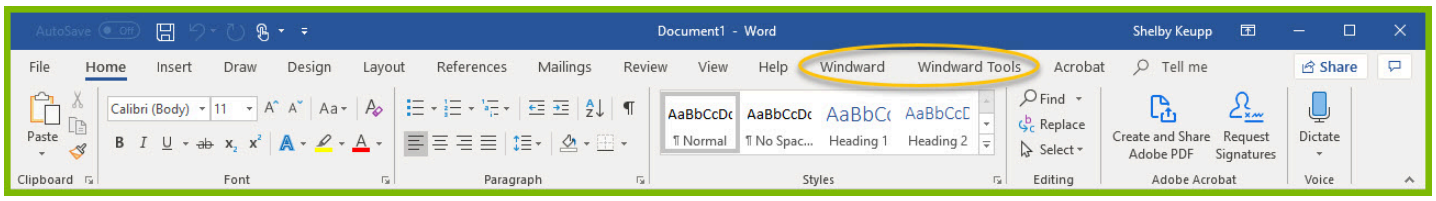
If Tag are used to conditionally display content in your Report Template, such as Tags, text, images, etc., in your output. An *If Tag* is basically a Boolean expression, or condition, such as "${varName} <= 10" (${varName} is less than or equal to 10), whose value determines whether the contents of the If Tag are processed. If the condition evaluates to 'true,' then the content between the If Tag and the EndIf Tag are processed. If the condition evaluates to 'false,' then the content between the If Tag and the EndIf Tag are ignored.

For example, if you only want to see prices for items that show a cost that is less than or equal to 10, you could display only those prices using a condition such as "${CostOfItems} <= 10" and ignore the cost of other items in the list.

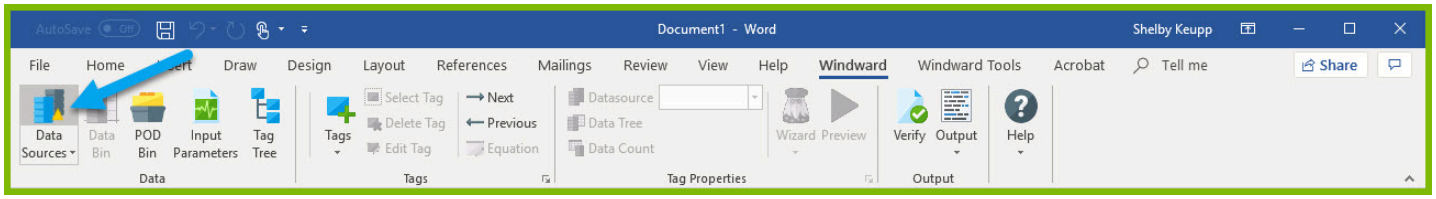
Since the If tag is only processed when the condition evaluates to 'true,' users can use an Else tag to display content in the case that the If tag evaluates to 'false.' For example, you may wish to print "the cost of this item is less than or equal to 10" if "${CostOfItems} <= 10" evaluates to 'true;' otherwise print "the cost of this item is greater than 10."

Step 2 - Connect to Data

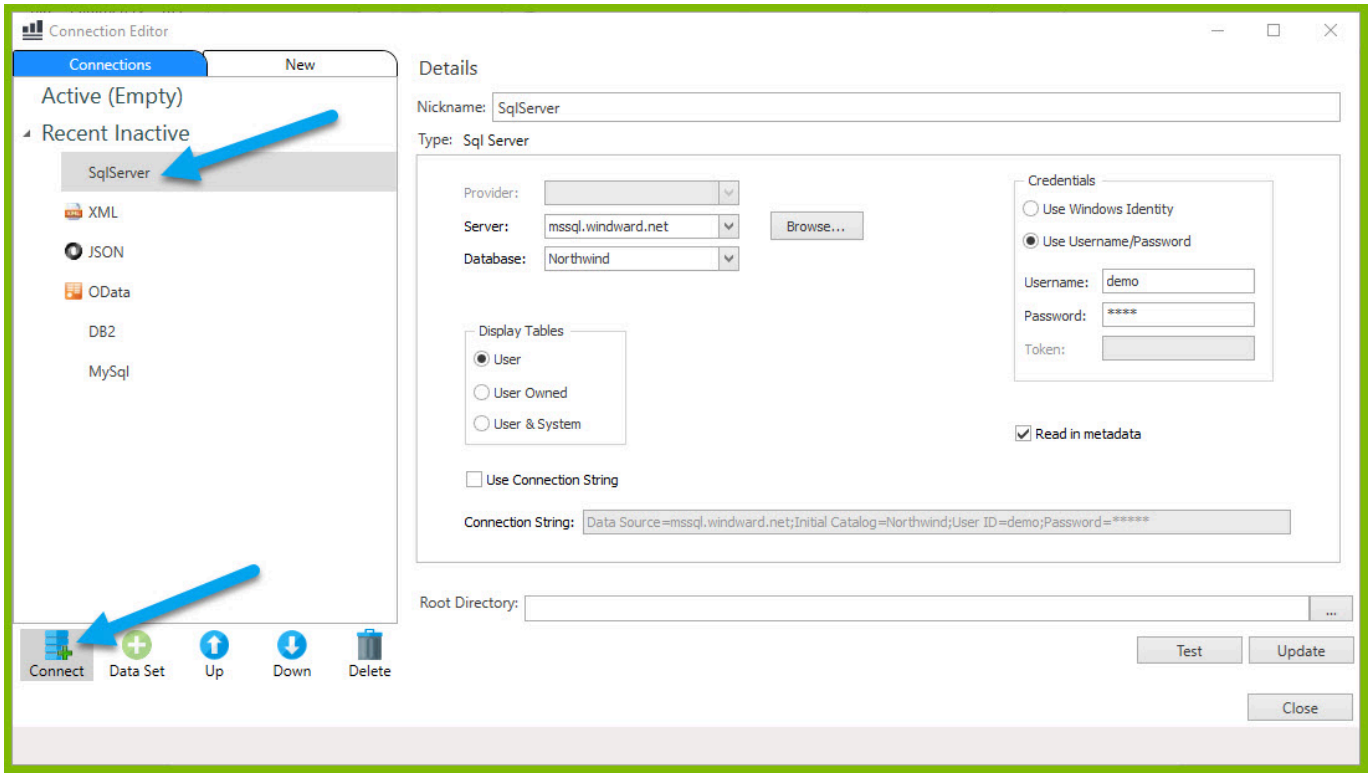
1. Open Microsoft Word. You will see two tabs in the Microsoft Office Ribbon – the "**Windward**" Tab and the "**Windward Tools**" Tab.



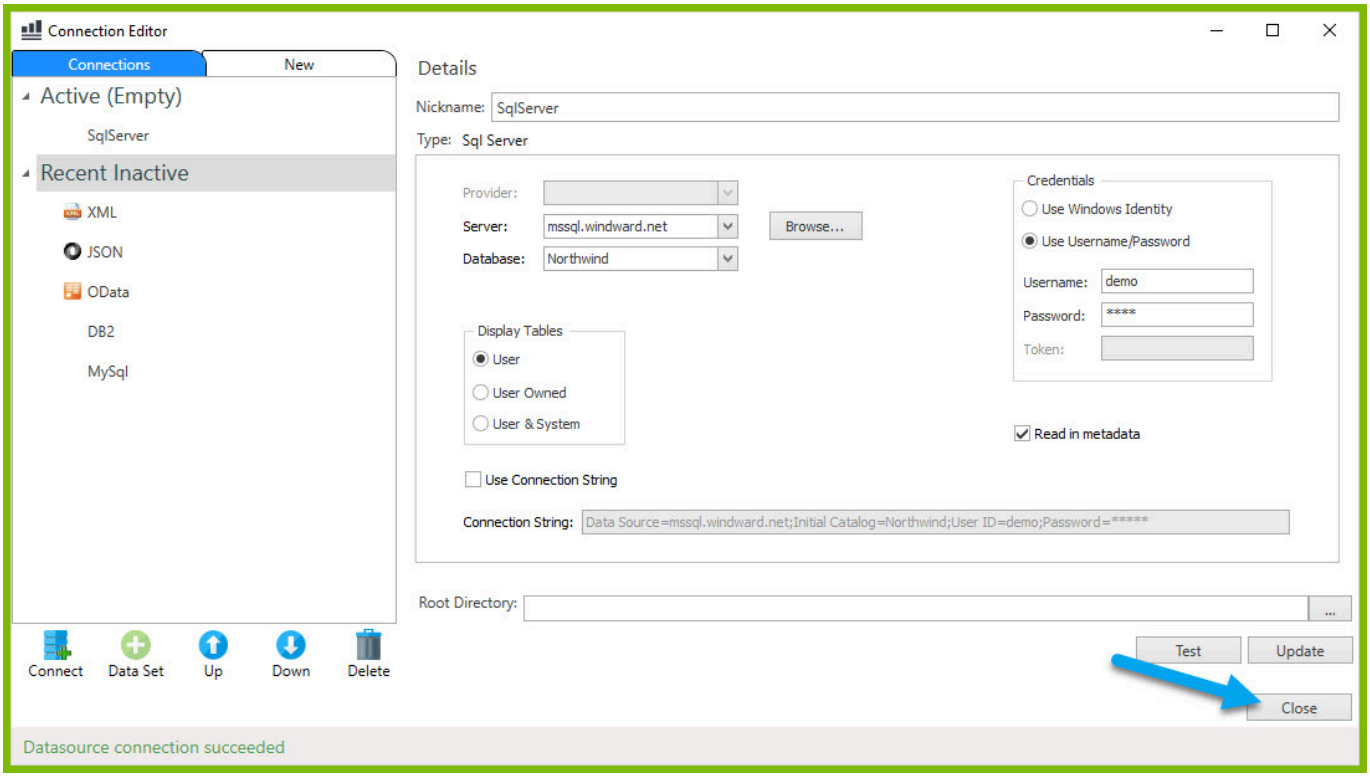
2. Click on the "**Windward Tab**" and click on the "**Data Sources**" button to open the connection editor.



3. In the Connection Editor window, select the data connection labeled "**SQLServer**" and click the "**Connect**" button.



4. Close the Connection Editor. You have now successfully connected to the sample data!



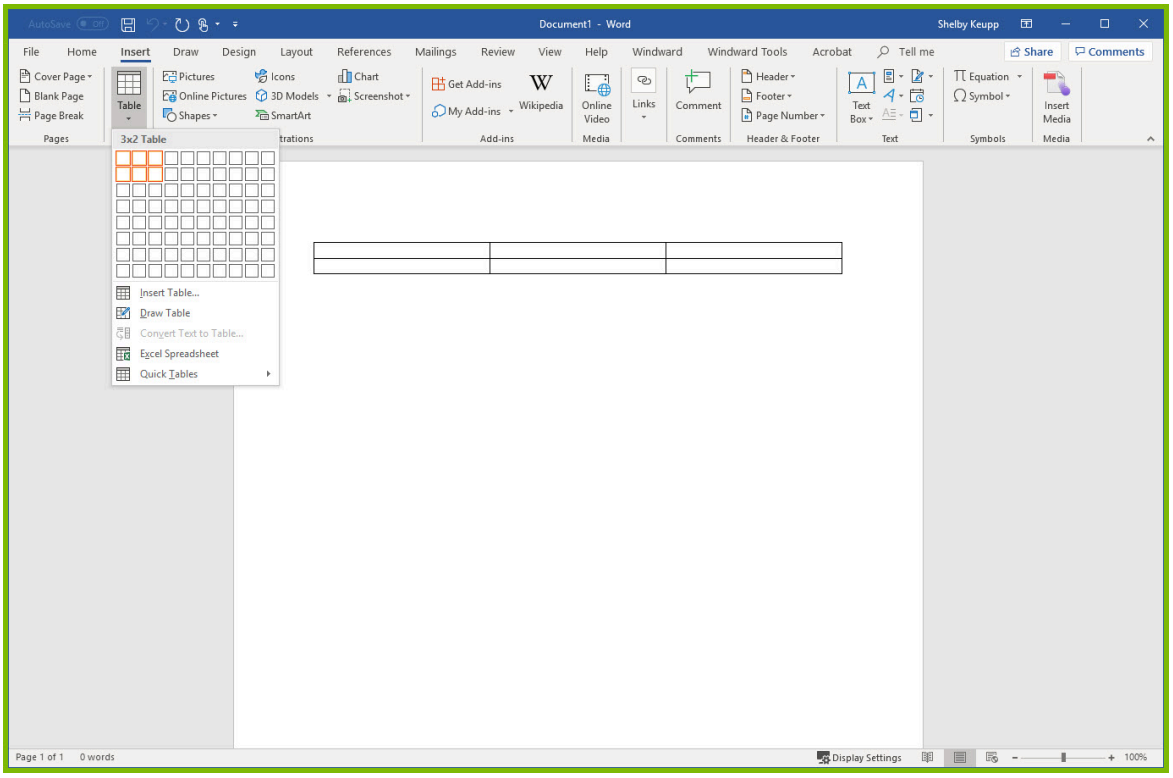
Step 3 - Design and fill a table template using ForEach

Using the ForEach tag, you will first make a basic table that displays a variety of product information.

1. Place your cursor on the first line of the template.

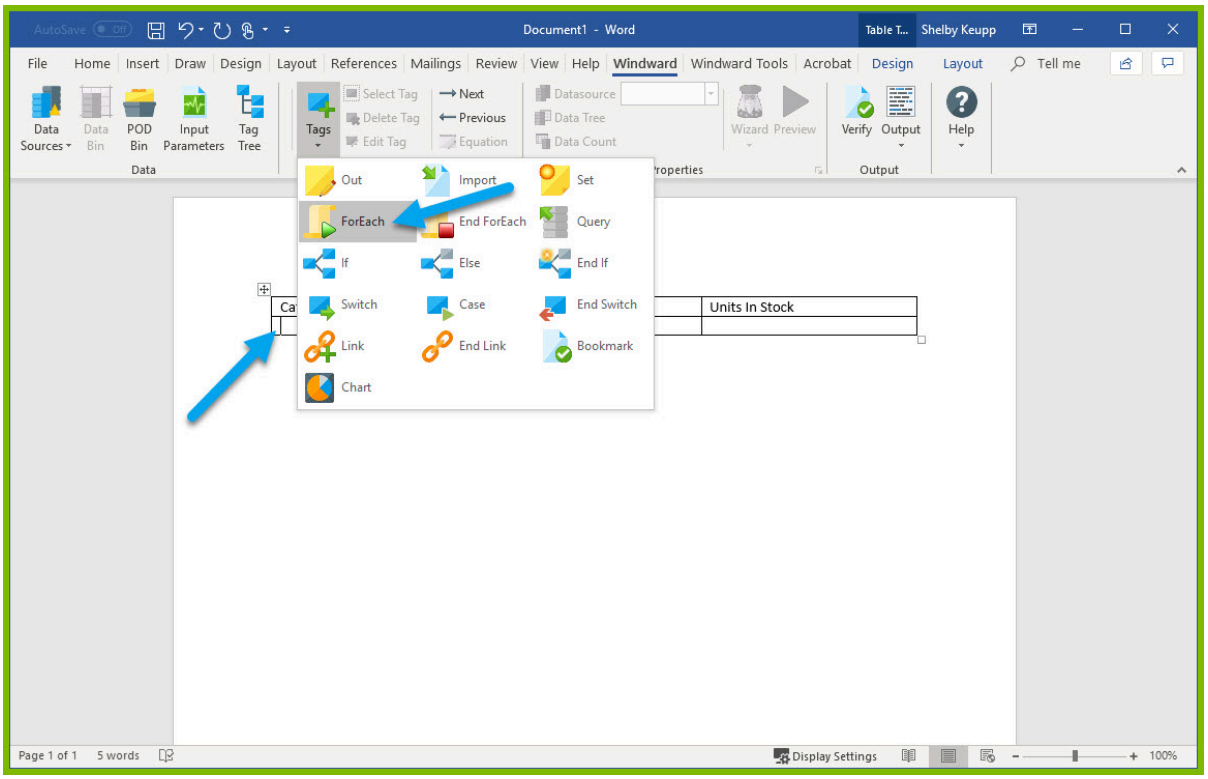
2. Go to the "**Insert**" ribbon, and click "**Table**"

3. In the drop-down, select a 3X2 table to insert.

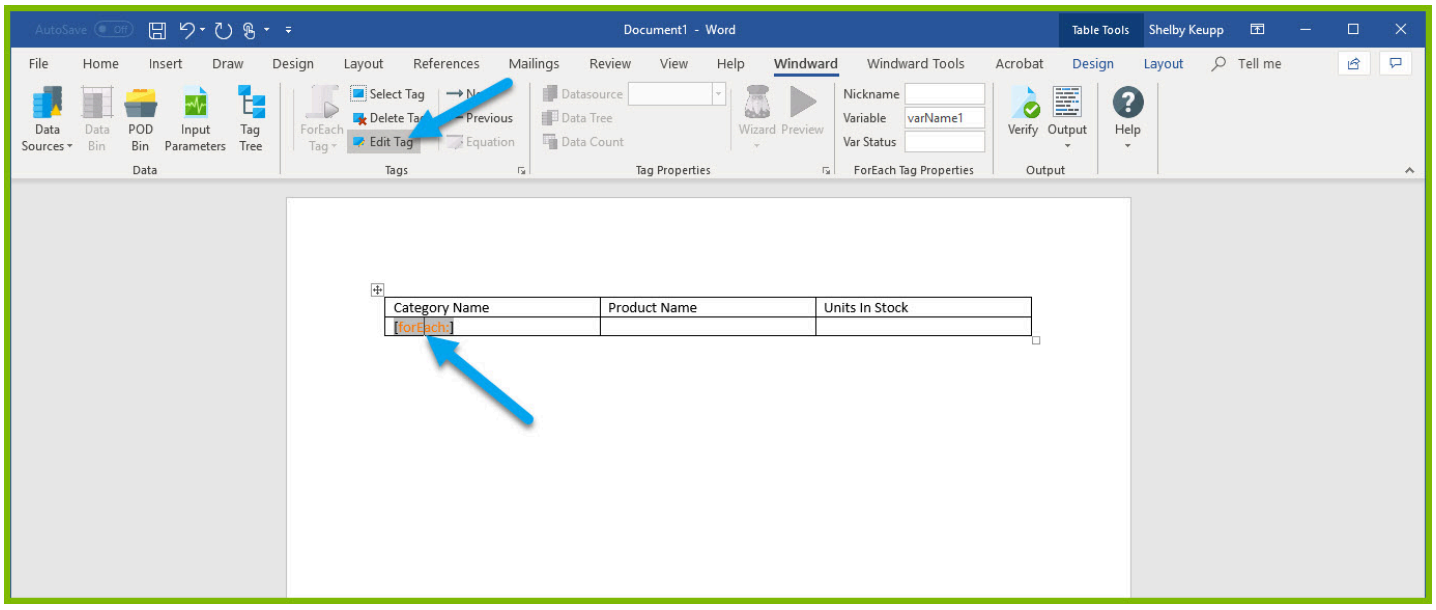


4. Give the columns of your table headers “Category Name,” “Product Name,” and “Units In Stock.”

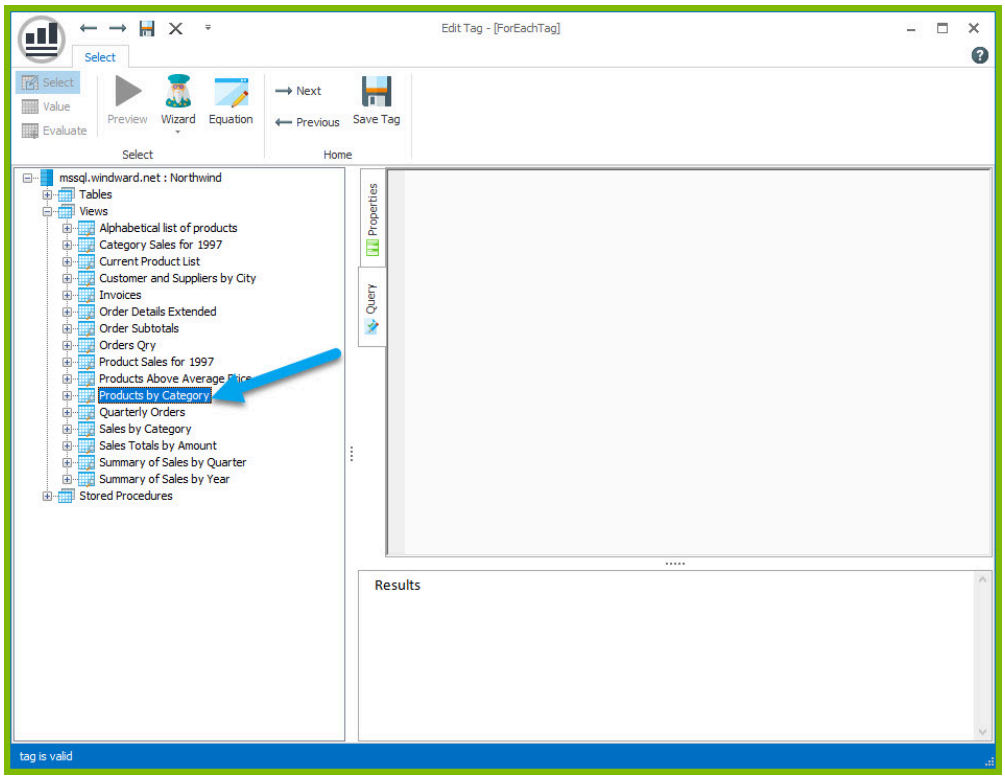
5. Place your cursor in the cell under “Category Name,” and insert a **ForEach** tag.



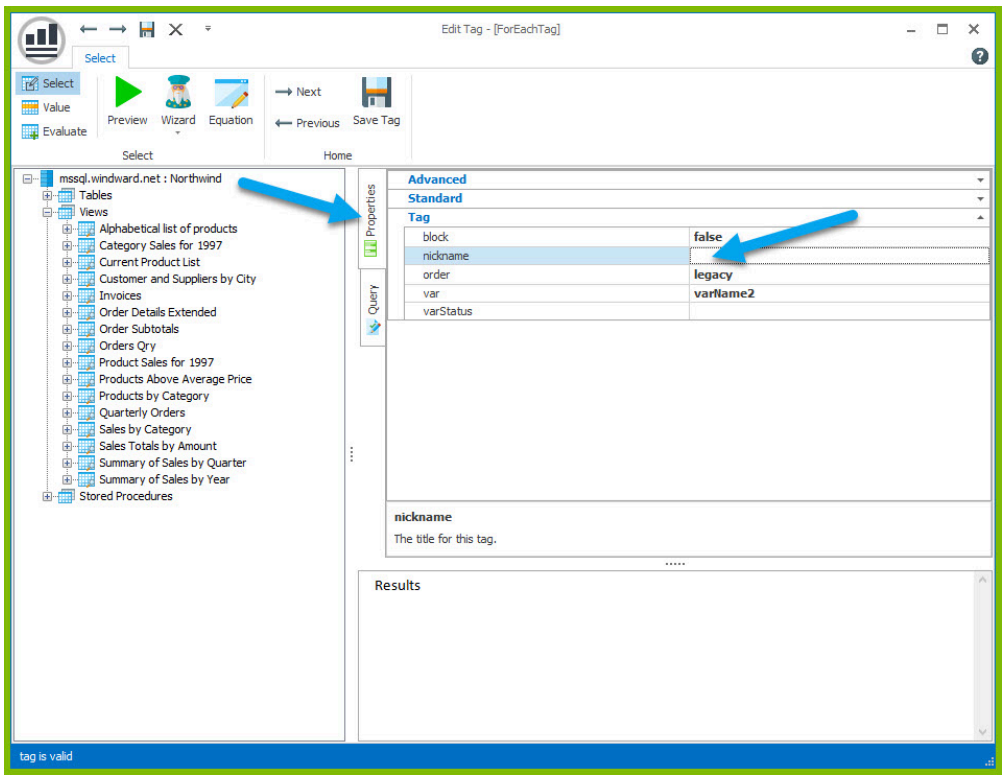
6. Place your cursor on the **“[forEach:]”** tag that was inserted in your template and click the **“Edit Tag”** button in the Windward ribbon to open the Tag Editor.



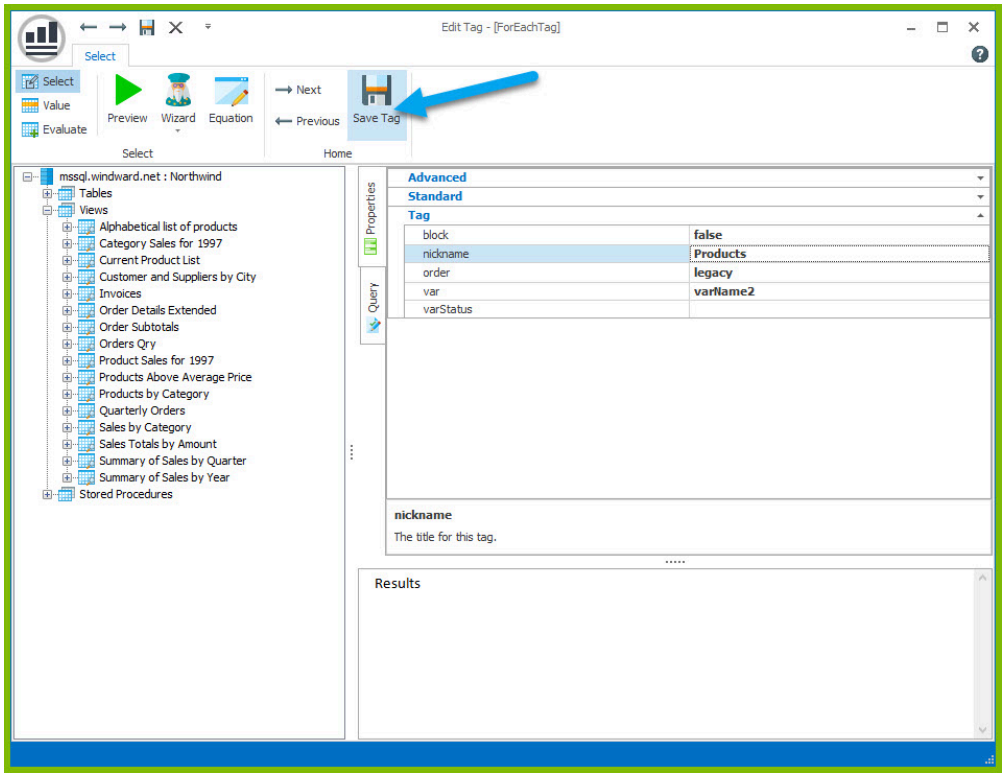
7. In the Tag Tree, expand the table mssql.windward.net : Northwind -> Views and double-click the **“Products by Category” view**. This will automatically write a select for every column in the Products by Category view.



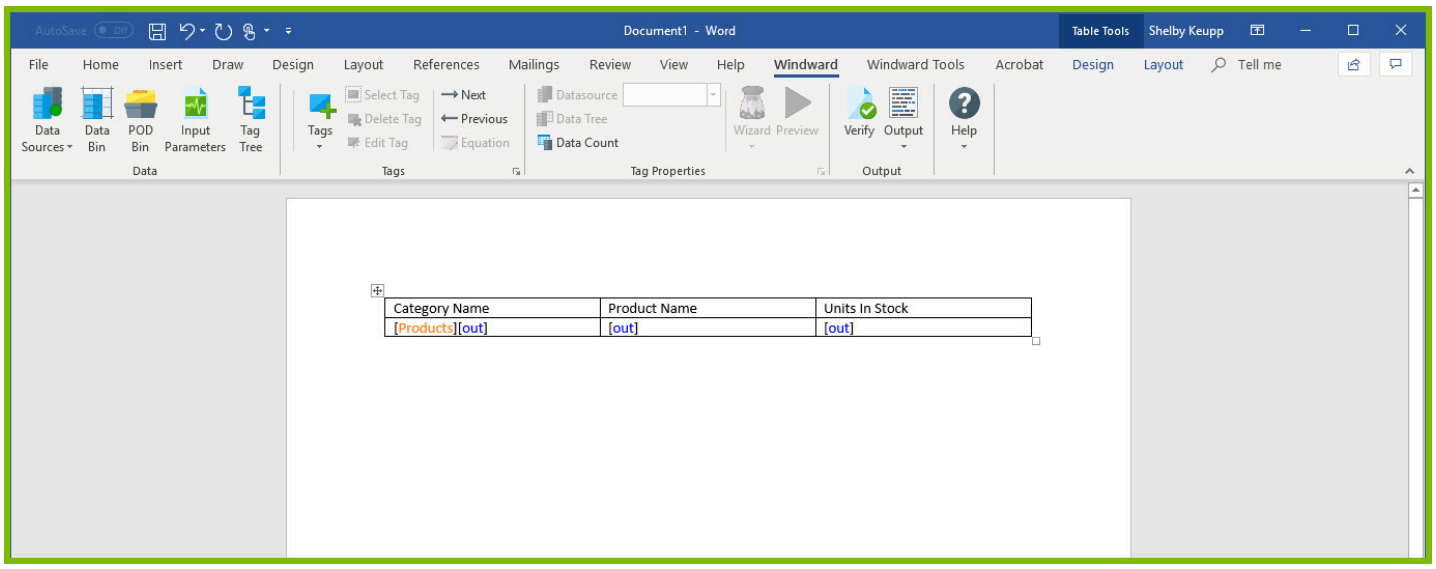
8. Go to the “**Properties”** and assign your tag a nickname “Products.”



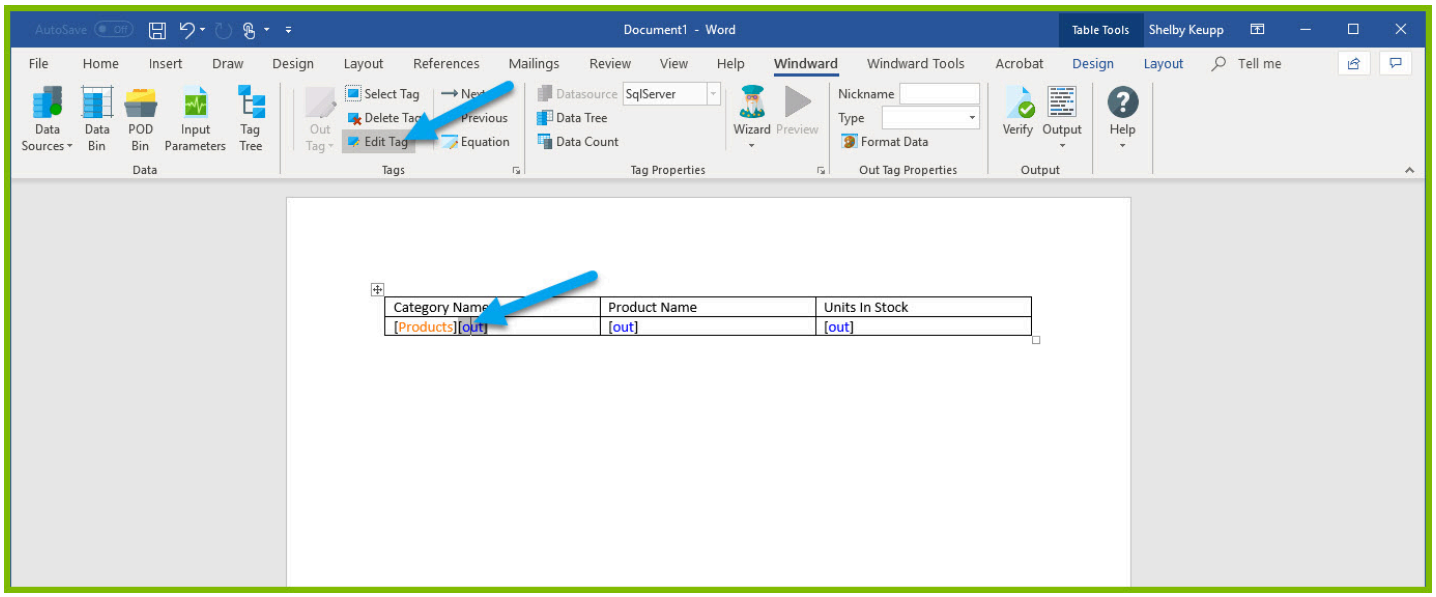
9. Click the "**Save Tag**" button.



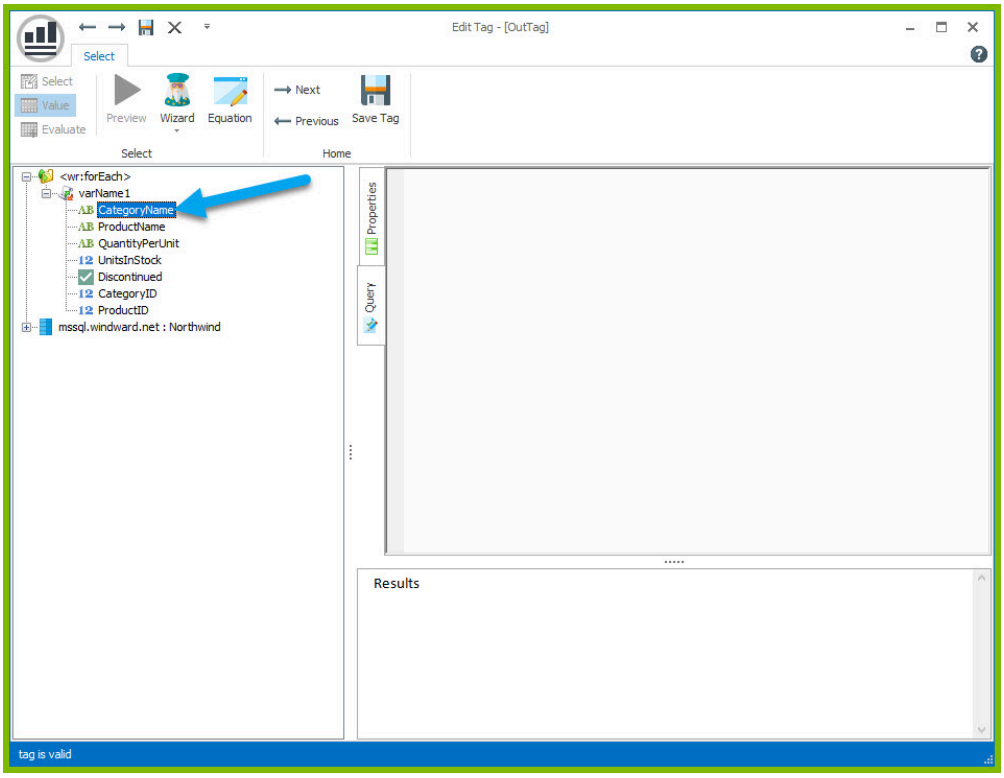
10. To output data in our table, we will need to add out tags. Place your cursor after the ForEach tag in the "Category Name" column and place an out tag. Place an out tag in the other two columns.



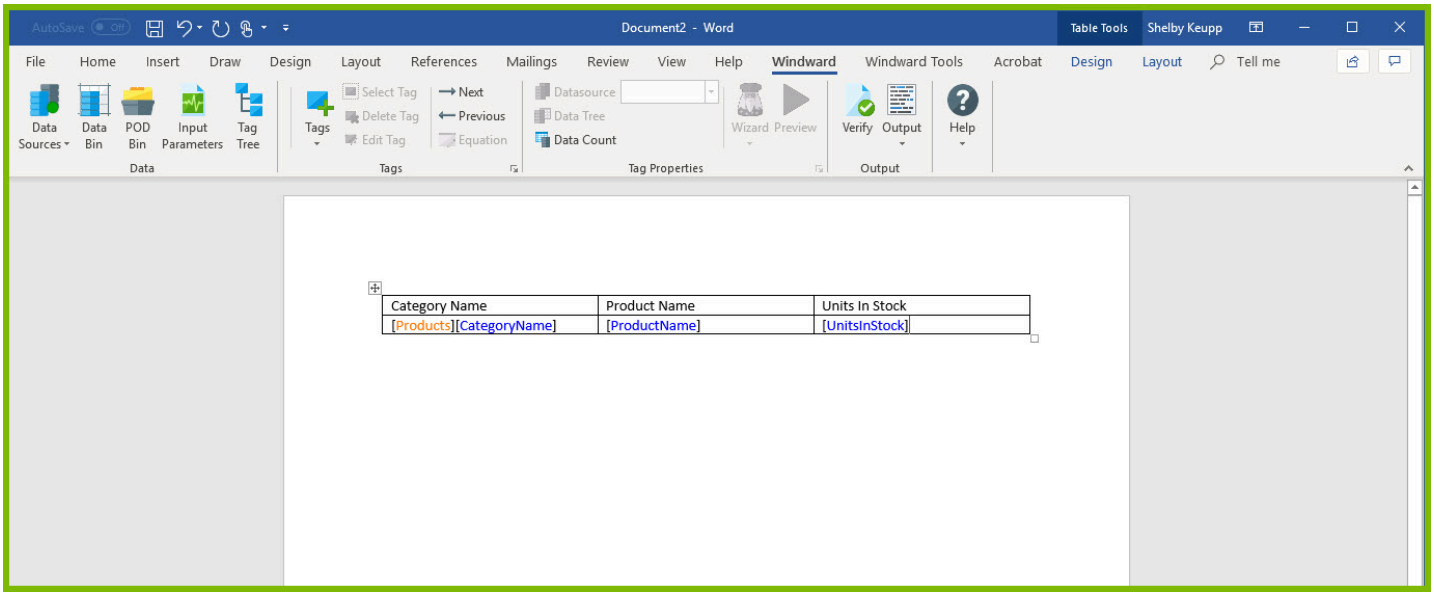
11. Open the Tag Editor for the Out tag in the “Category Name” column.



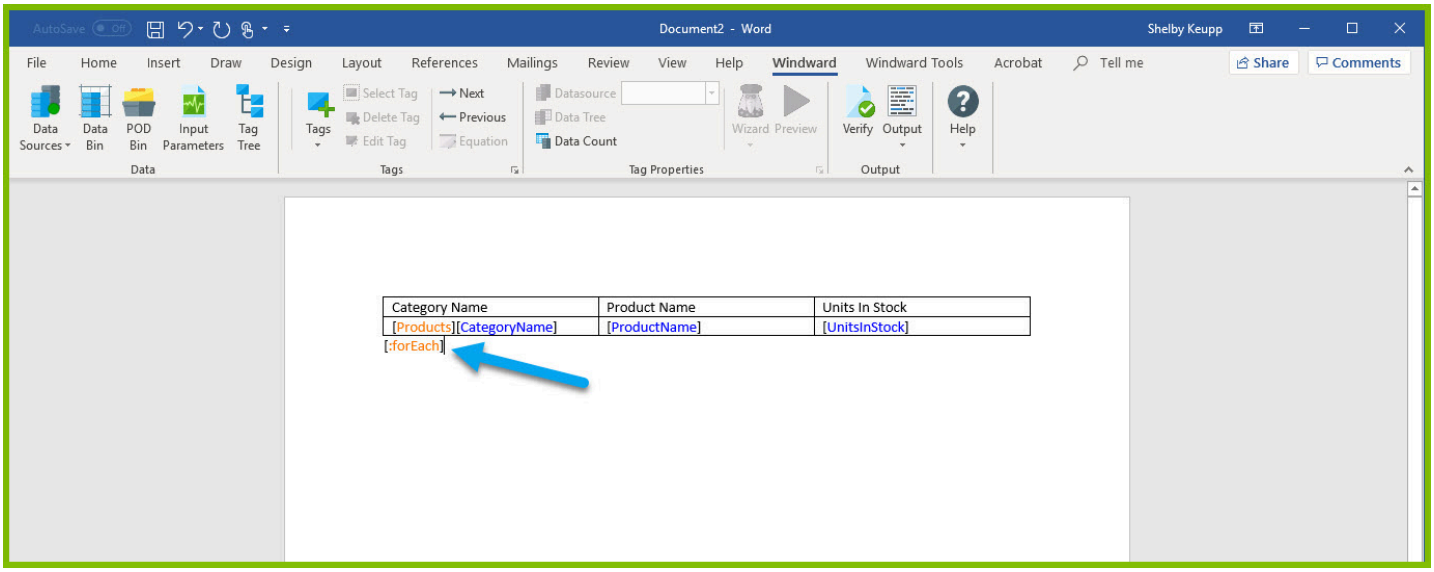
12. In the Tag Tree, expand the <wr:forEach> -> varName1 and double-click the **“CategoryName”** node. This will automatically write a select for Category Name currently captured by the ForEach variable.



13. Save the tag and repeat the previous two steps to select the "**ProductName**" node for the "Product Name" column and the "**UnitsInStock**" node for the "Units In Stock" column.

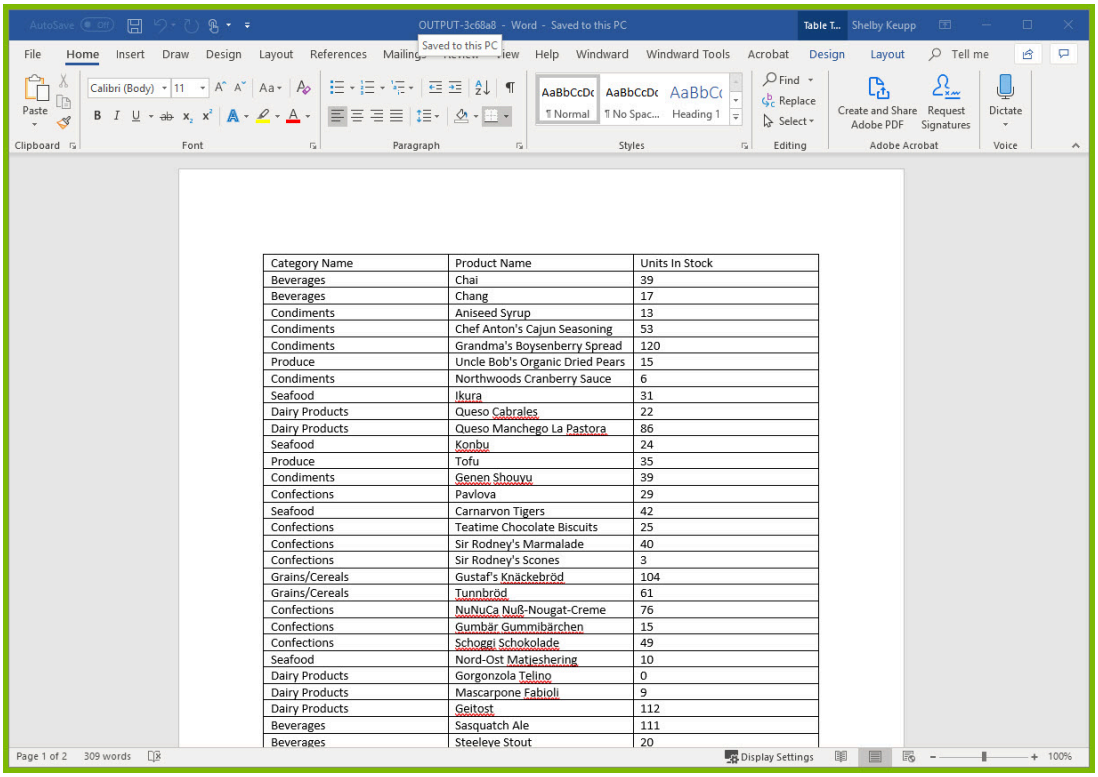


14. On the line after your table, place an EndForEach tag.



Since the ForEach loop will re-produce the tag output and content captured between the ForEach and the EndForEach tags, one row of the table will be produced for every record returned by the ForEach tags select.

15. Save and output the template to DOCX output and see your results:



Category Name	Product Name	Units In Stock
Beverages	Chai	39
Beverages	Chang	17
Condiments	Aniseed Syrup	13
Condiments	Chef Anton's Cajun Seasoning	53
Condiments	Grandma's Boysenberry Spread	120
Produce	Uncle Bob's Organic Dried Pears	15
Condiments	Northwoods Cranberry Sauce	6
Seafood	Ikura	31
Dairy Products	Queso Cabrales	22
Dairy Products	Queso Manchego La Pastora	86
Seafood	Konbu	24
Produce	Tofu	35
Condiments	Genen Shouyu	39
Confections	Pavlova	29
Seafood	Carnarvon Tigers	42
Confections	Teatime Chocolate Biscuits	25
Confections	Sir Rodney's Marmalade	40
Confections	Sir Rodney's Scones	3
Grains/Cereals	Gustaf's Knäckebröd	104
Grains/Cereals	Tunnbröd	61
Confections	NuNuCa Nuß-Nougat-Creme	76
Confections	Gumbär Gummibärchen	15
Confections	Schoggi Schokolade	49
Seafood	Nord-Ost Matjeshering	10
Dairy Products	Gorgonzola Telino	0
Dairy Products	Mascarpone Fabioli	9
Dairy Products	Geitost	112
Beverages	Sasquatch Ale	111
Beverages	Steeleye Stout	20

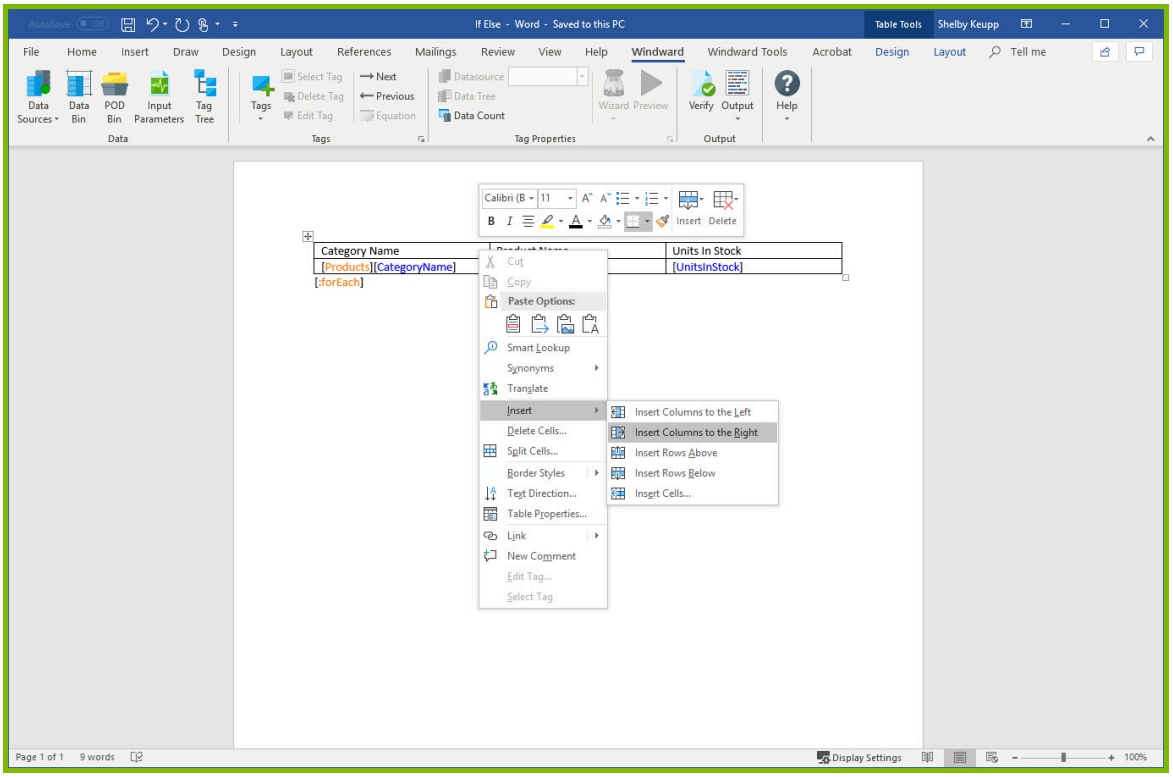
We are receiving the output we expected, but it is not very useful as is. To further analyze the output and determine if certain standards are met, we can use the If, Else, and EndIf tags.

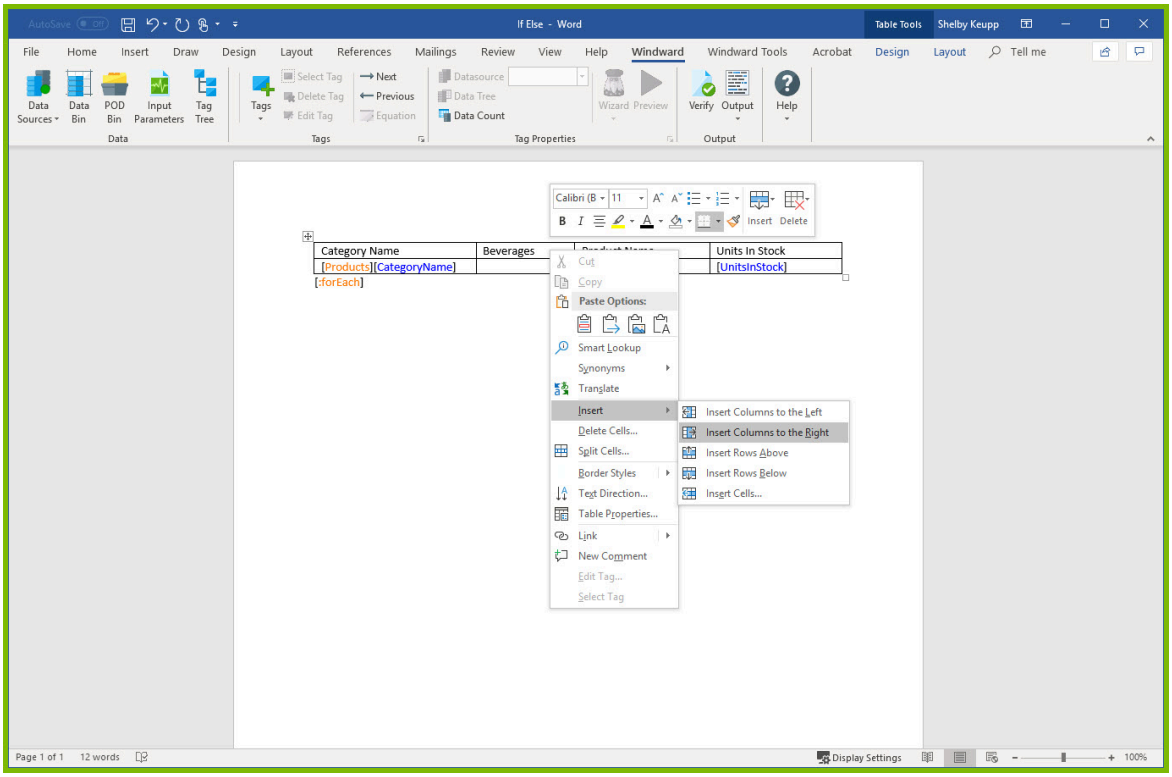
Our goal is to determine which products are beverages and which products are food. Then after we separate our products into the two categories, we want to look at the Units In Stock values to see which products will need to be ordered.

Step 4 – Analyzing the Output

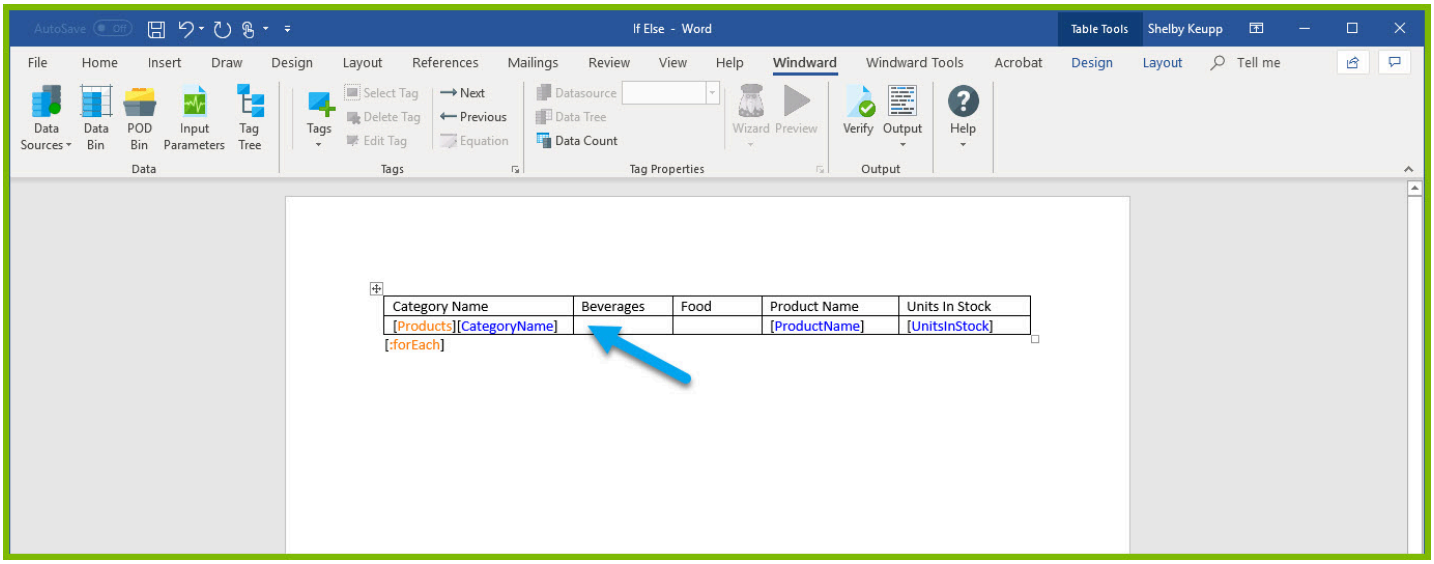
To denote which products are beverages and which products are food, we need to add two columns to the table between “Category Name” and “Product Name.”

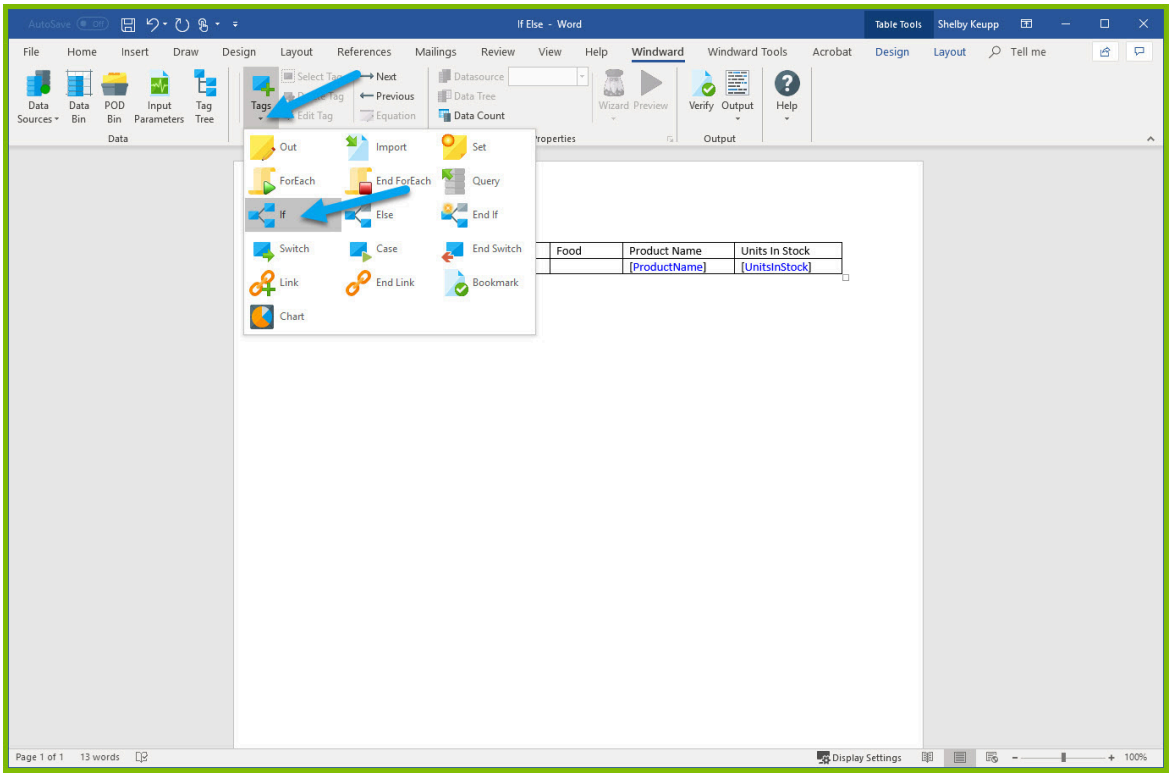
1. Add two columns to the right of the “Category Name” column. Give the new columns of your table headers “Beverages” and “Food.”



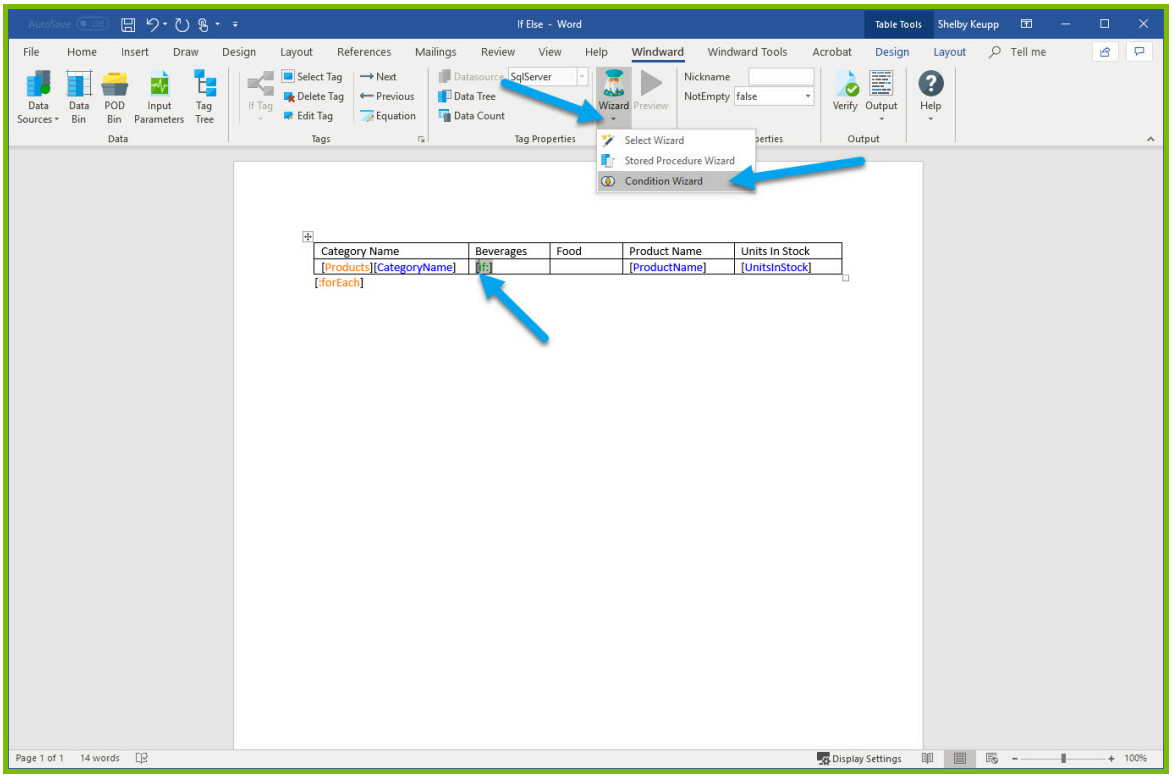


2. Place your cursor in cell below “Beverages” and insert an **If** tag.



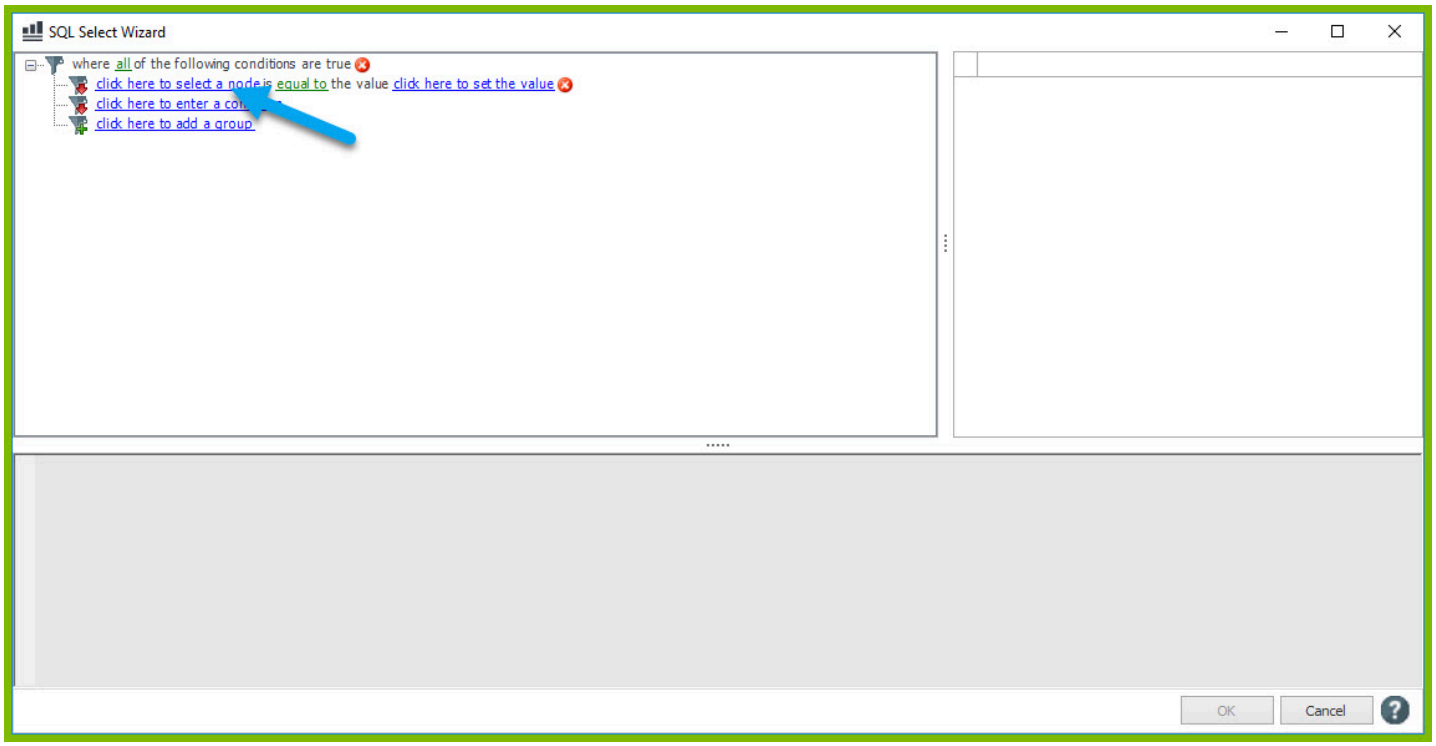


3. Place your cursor on the **If** tag that was inserted in your template and click the dropdown under the "**Wizard**" button in the Windward Ribbon, then select "**Condition Wizard**" from the dropdown options to open the Condition Wizard.

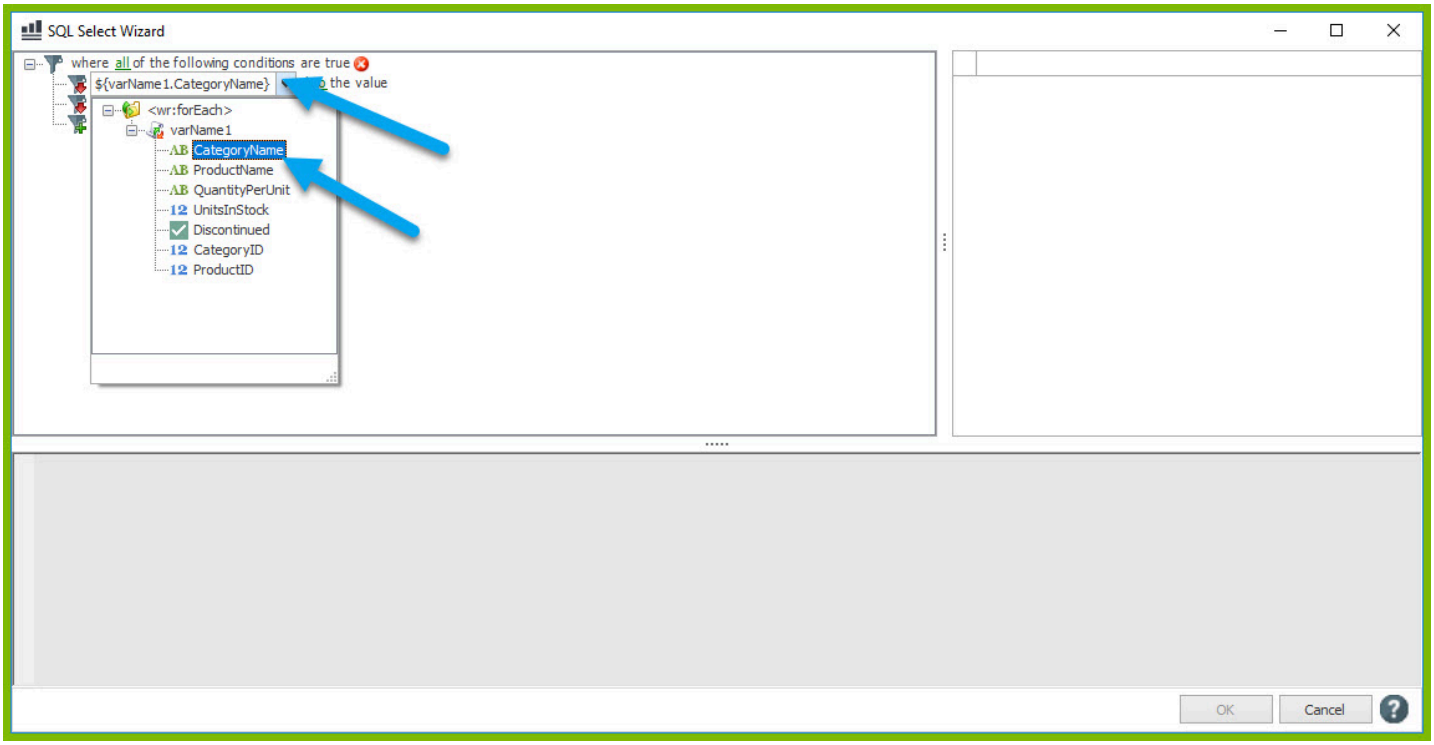


4. Select the line labeled "**click here to enter a condition"** and another line will appear in its place after your selection.

5. Now select the line labeled "**click here to select a node"** that appeared.

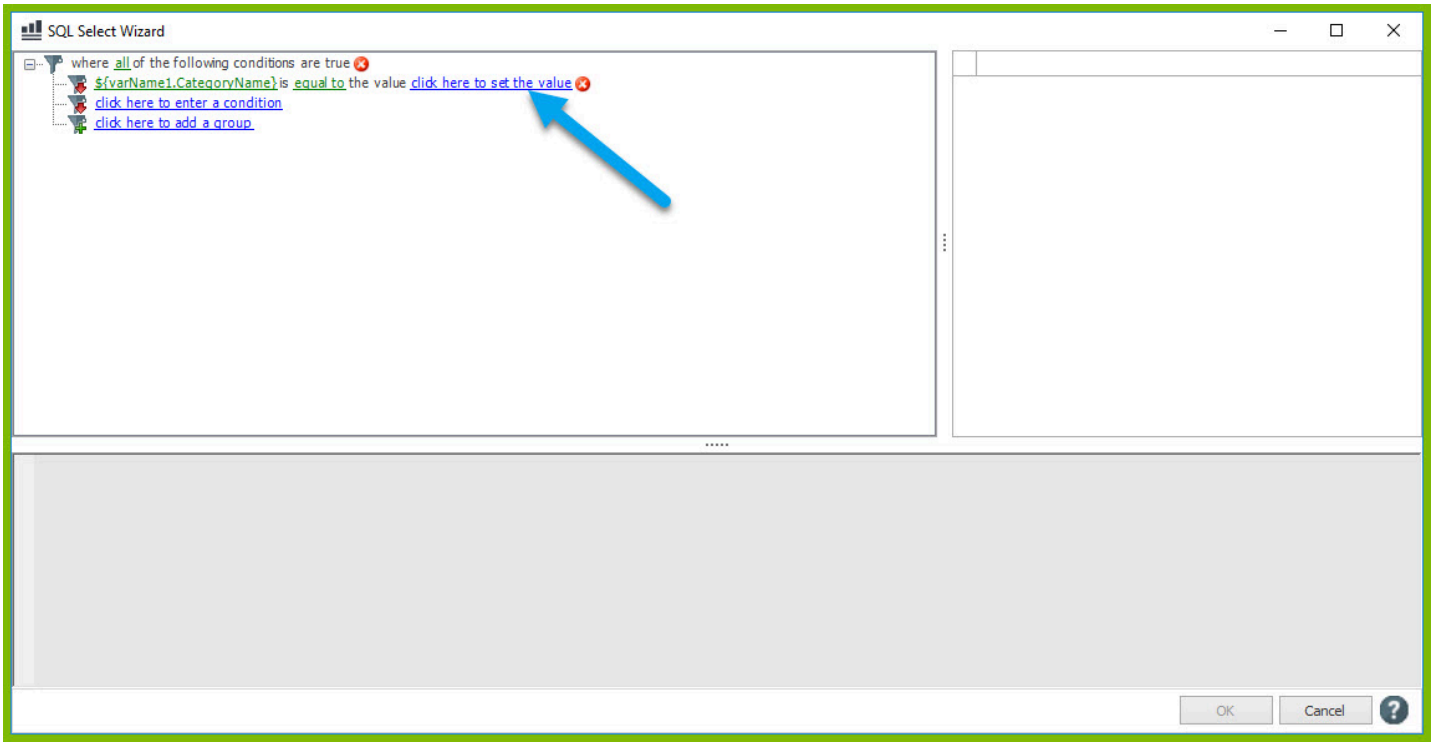


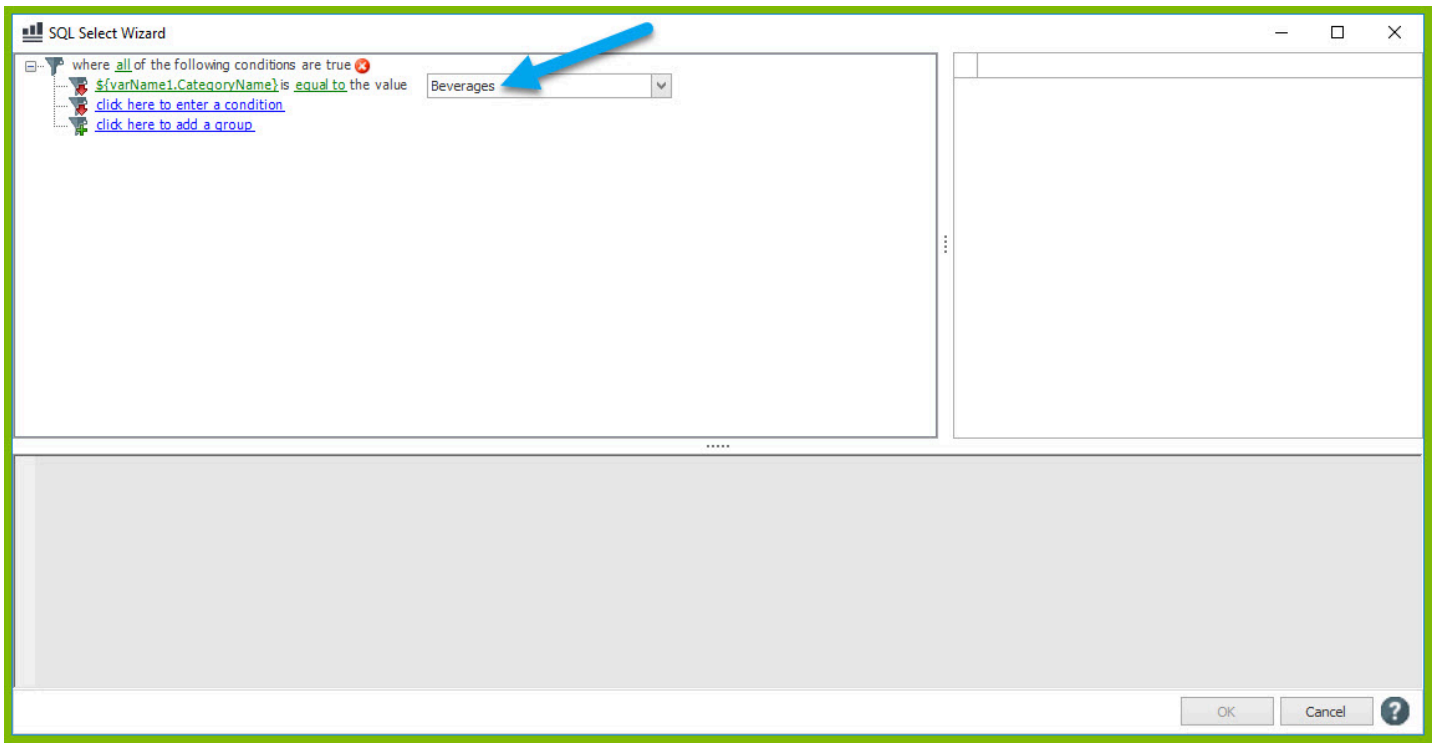
6. Using the dropdown available expand the Tag Tree, then expand varName1 and double-click the **"CategoryName"** node.

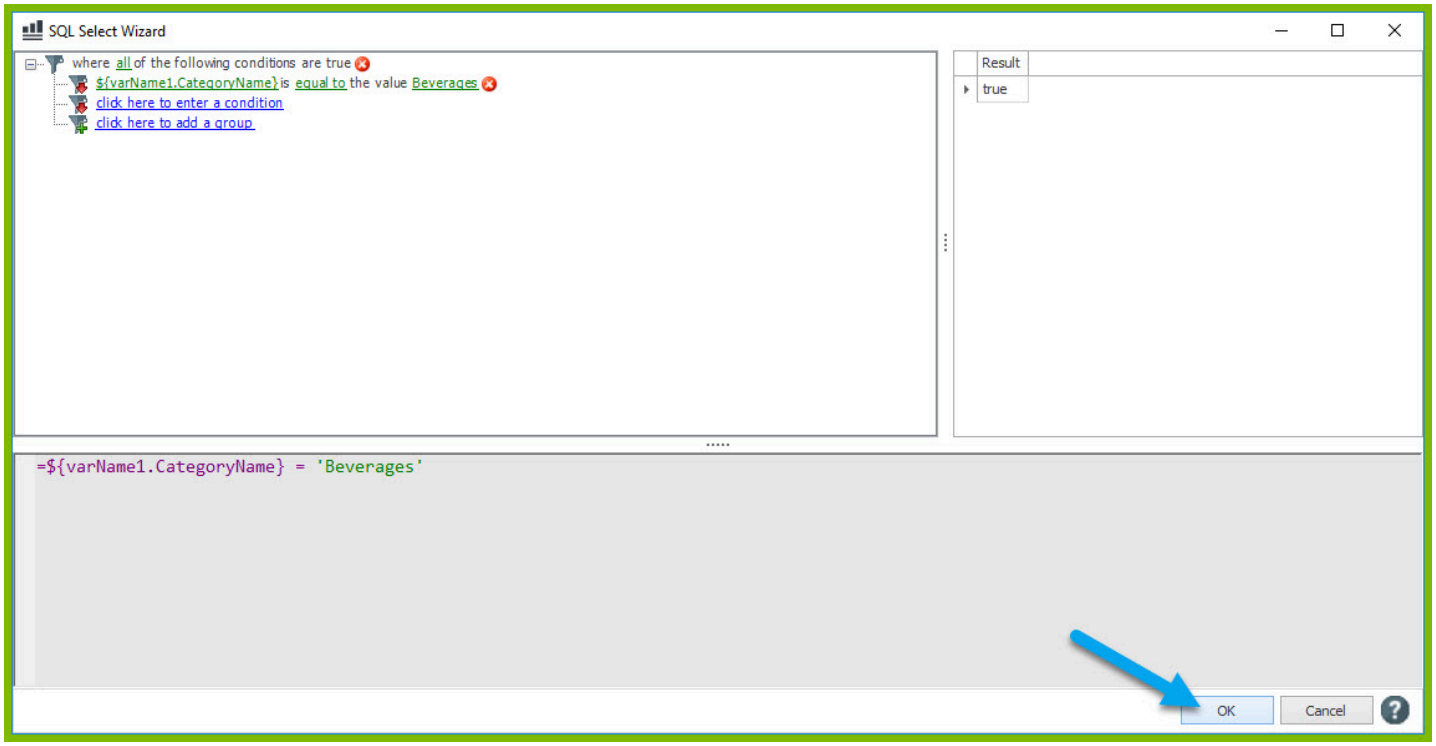


We don't need to change the line labeled "equal to" as that is the value we will be using for this condition.

7. Select the line labeled "**click here to set the value**" and enter the value "Beverages" then press enter. Now select "**OK**" in the corner to exit the selection wizard.

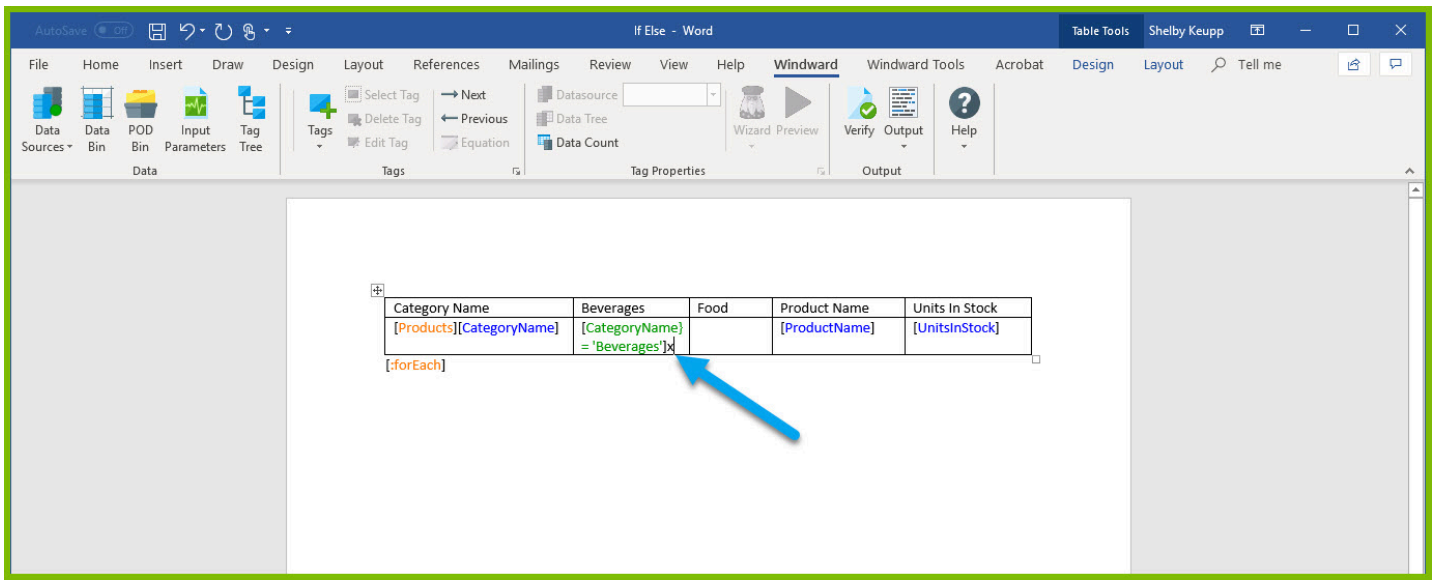




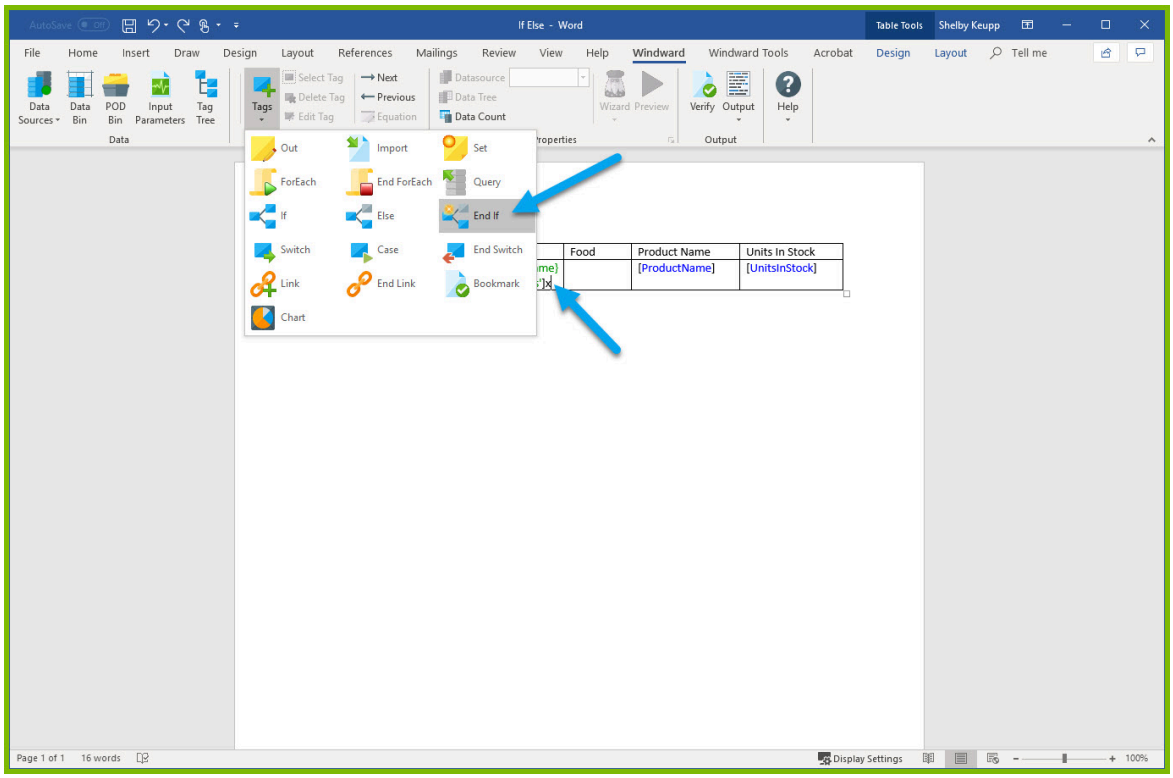


If the CategoryName is equal to “Beverages,” then we want to denote that in the “Beverages” column.

8. Place your cursor after the If tag, then type the letter “x.”

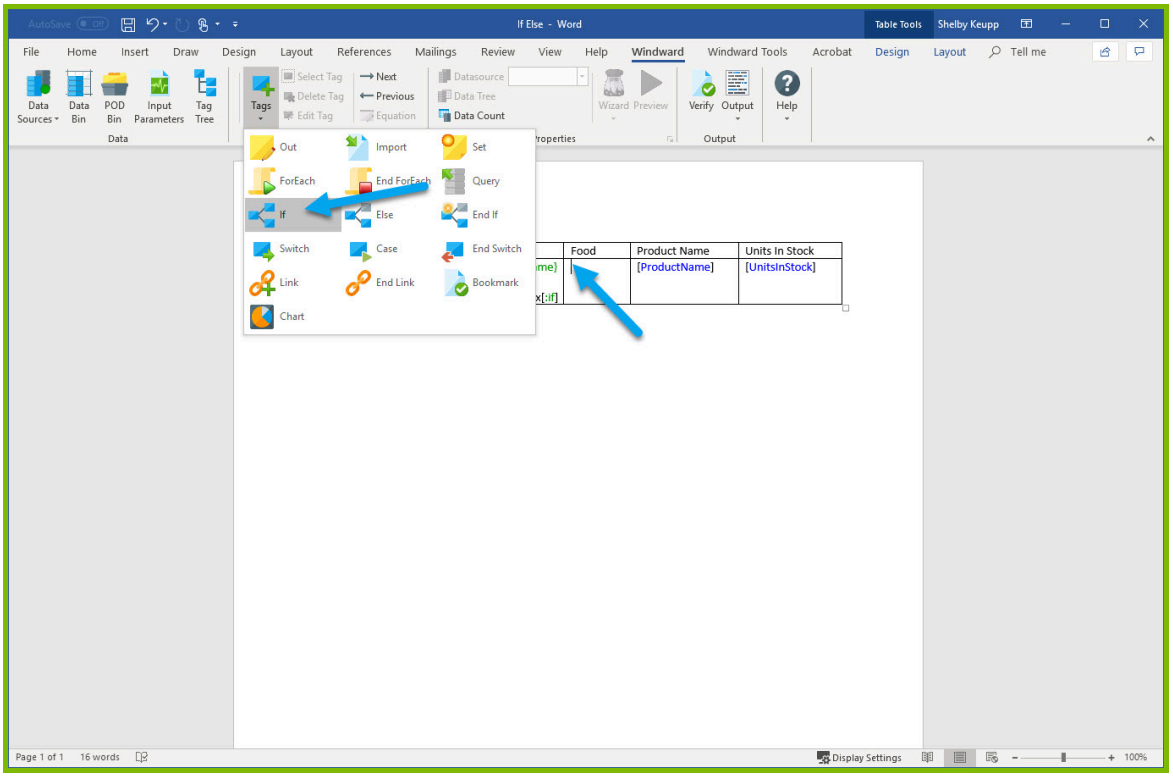


9. Place your cursor directly after the letter “x” and insert an **EndIf** tag.

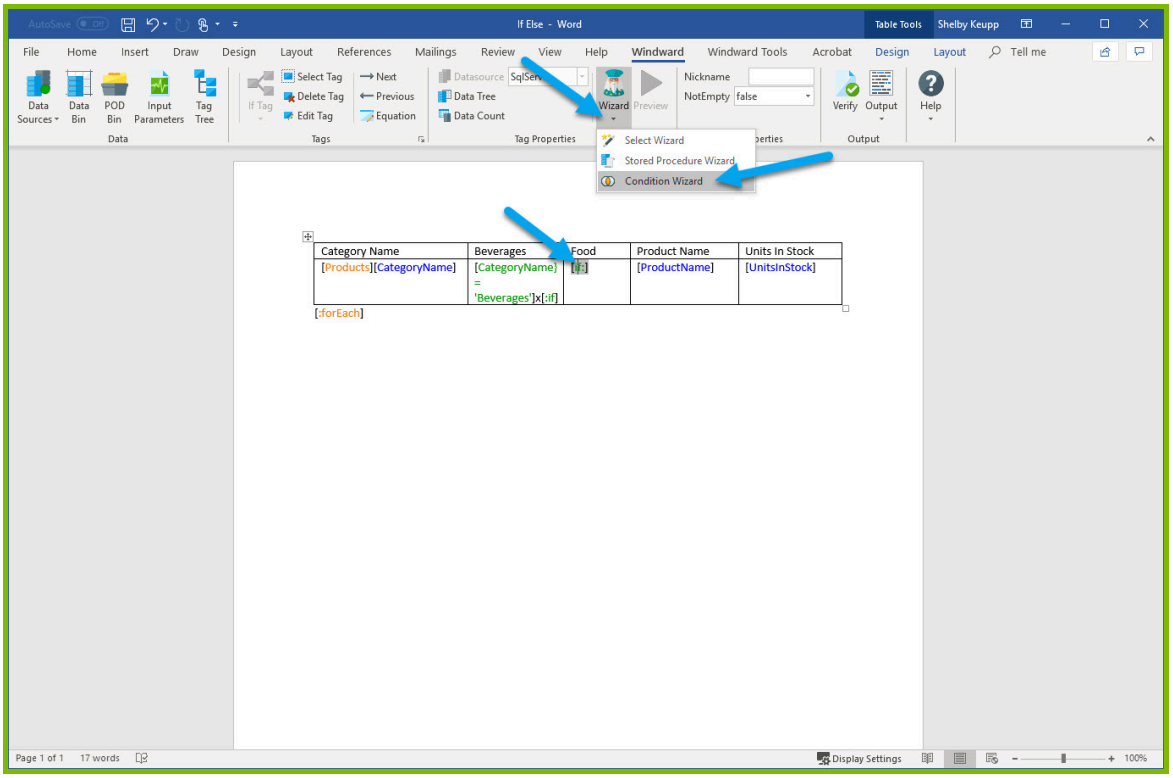


We now need to follow similar steps for the “Food” column in order to denote when a product has a Category Name that isn’t equal to “Beverages.”

10. Place your cursor in cell below “Food” and insert an **If** tag.

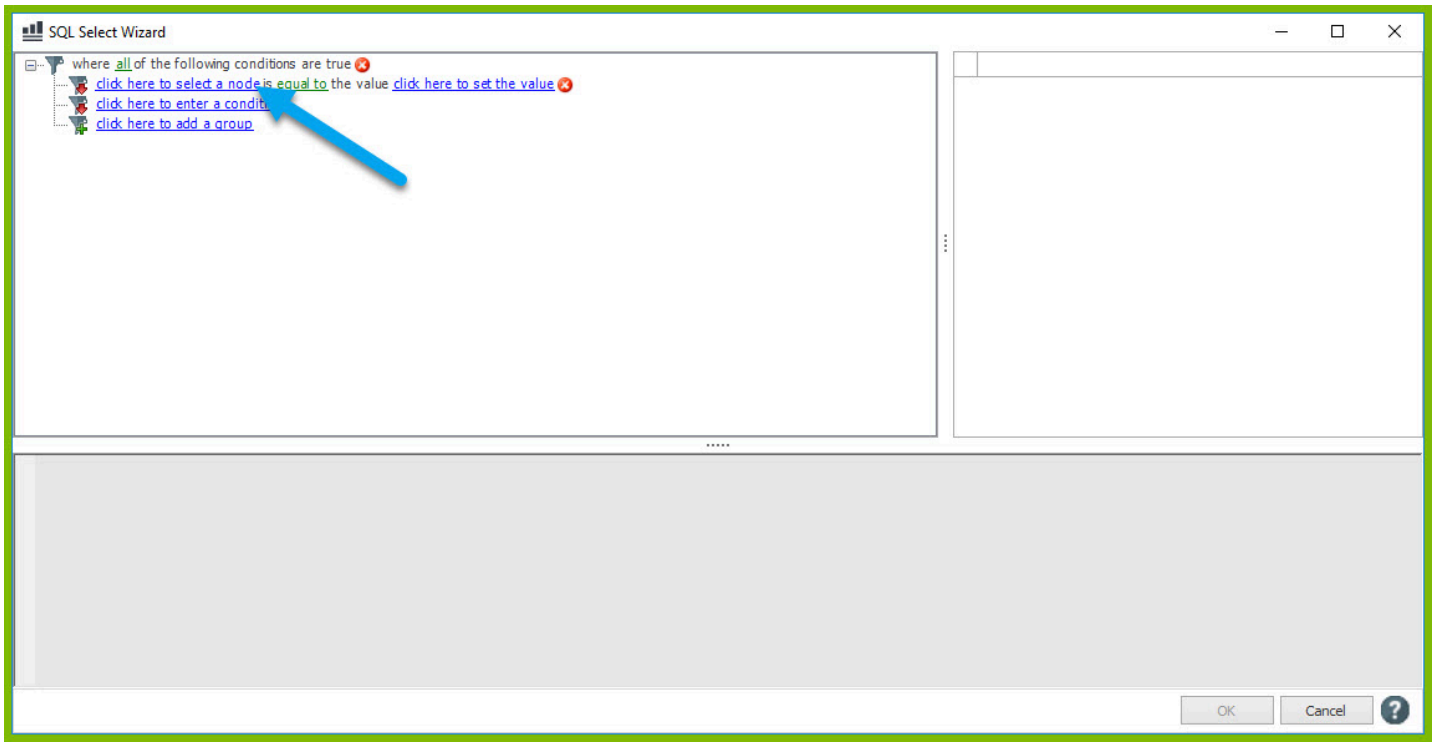


11. Place your cursor on the **If** tag that was inserted in your template and click the dropdown under the "**Wizard**" button in the Windward Ribbon, then select "**Condition Wizard**" from the dropdown options to open the Condition Wizard.

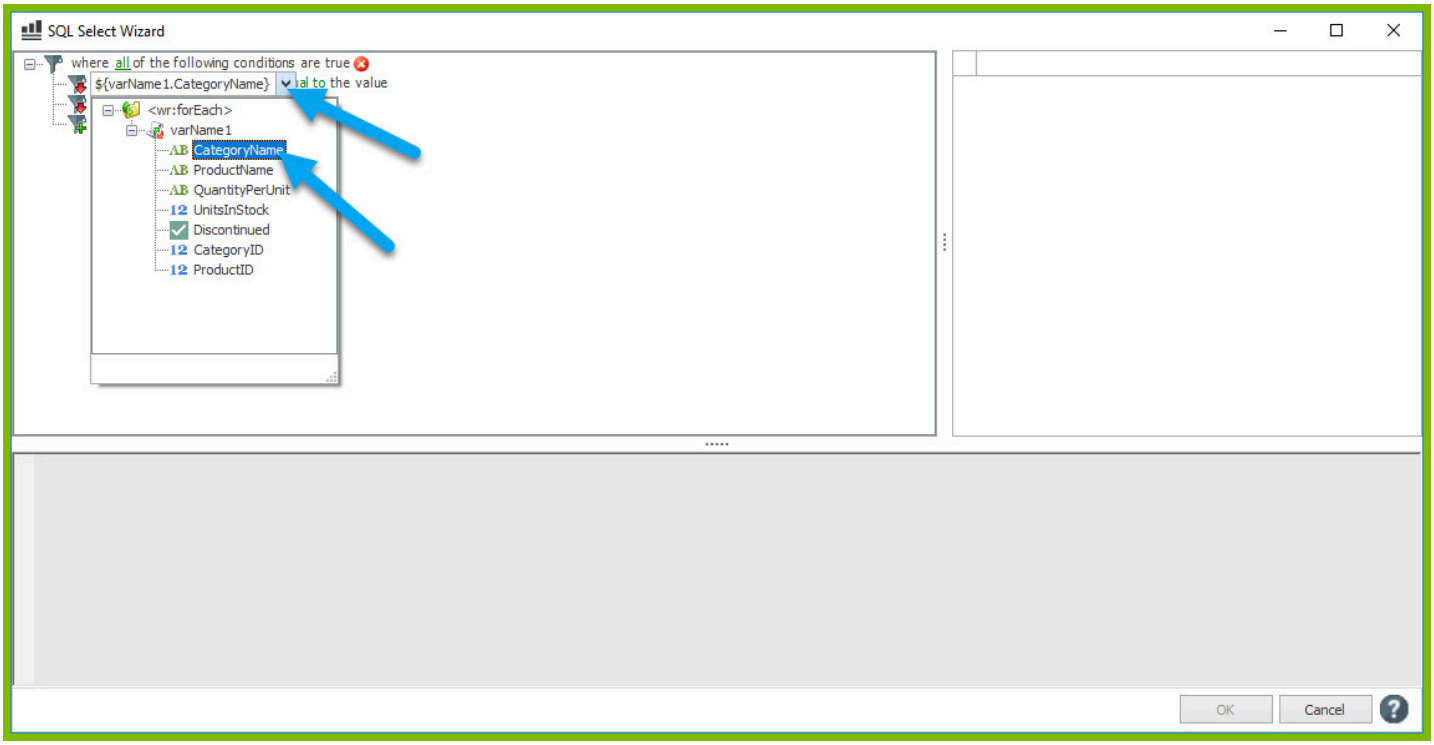


12. Select the line labeled "**click here to enter a condition"** and another line will appear in its place after your selection.

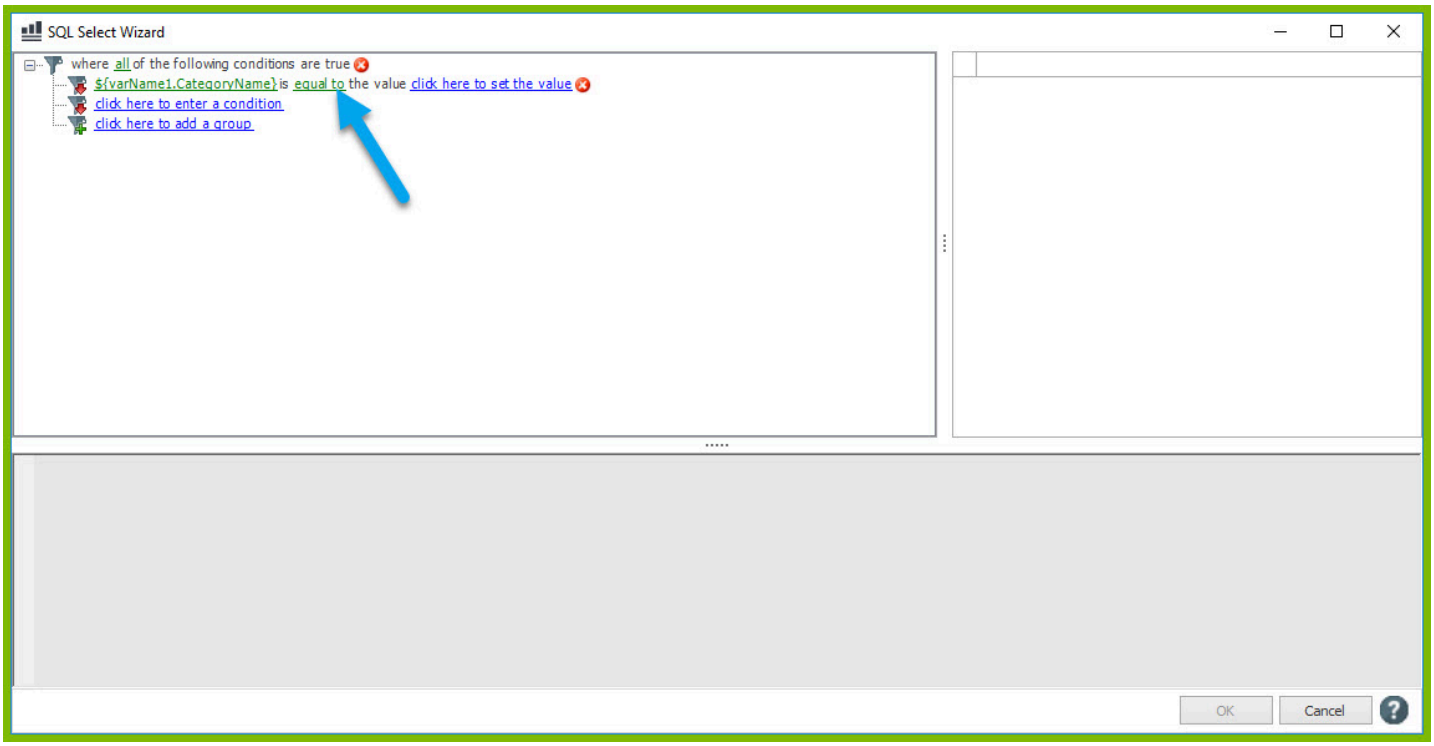
13. Now select the line labeled "**click here to select a node"** that appeared.

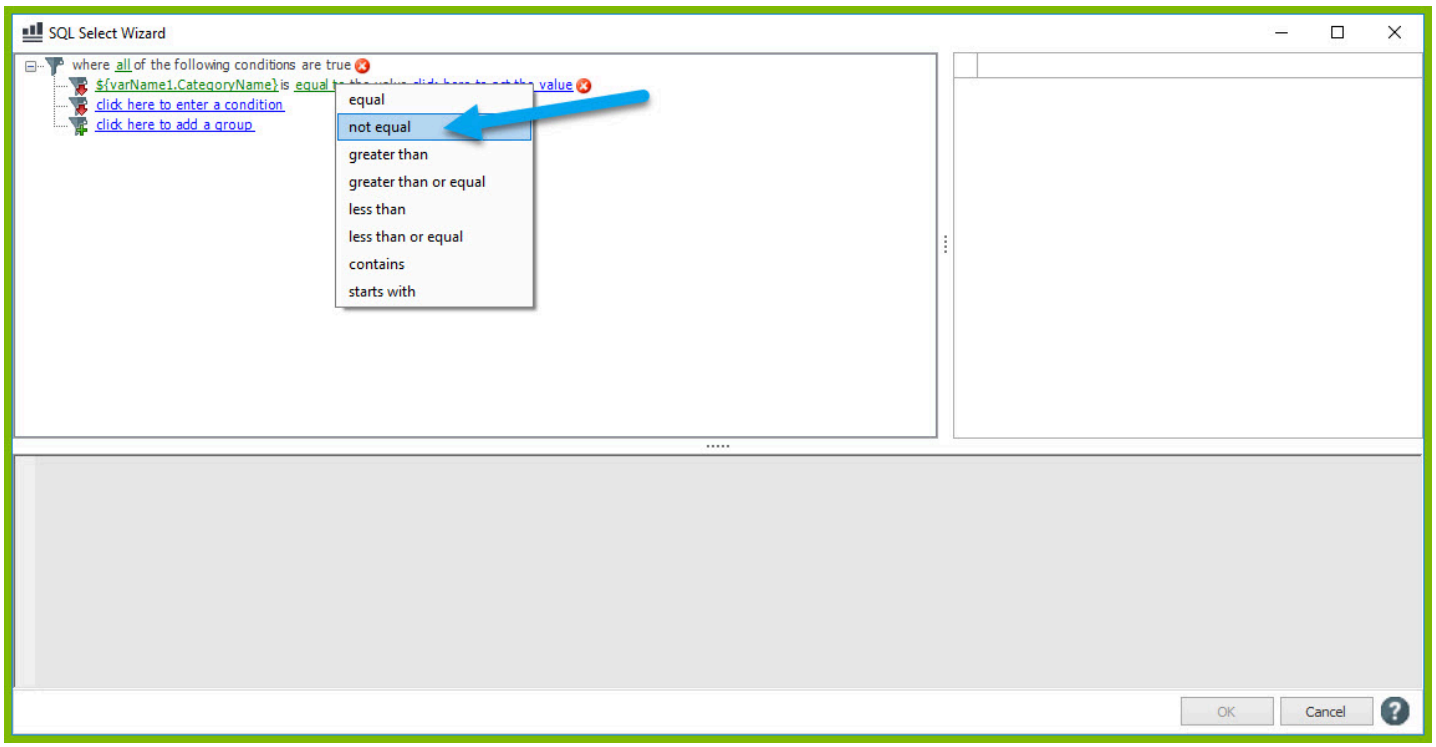


14. Using the dropdown available expand the Tag Tree, then expand varName1 and double-click the **"CategoryName"** node.

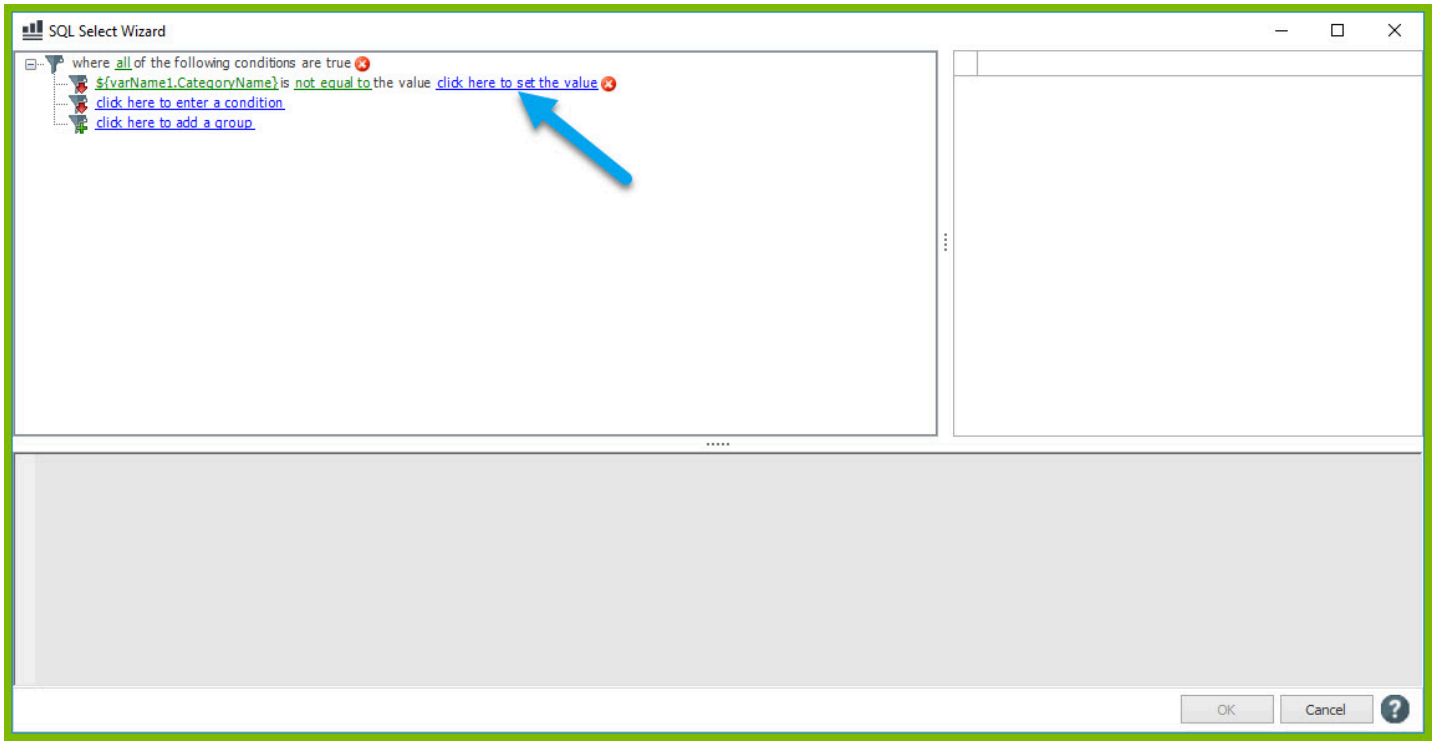


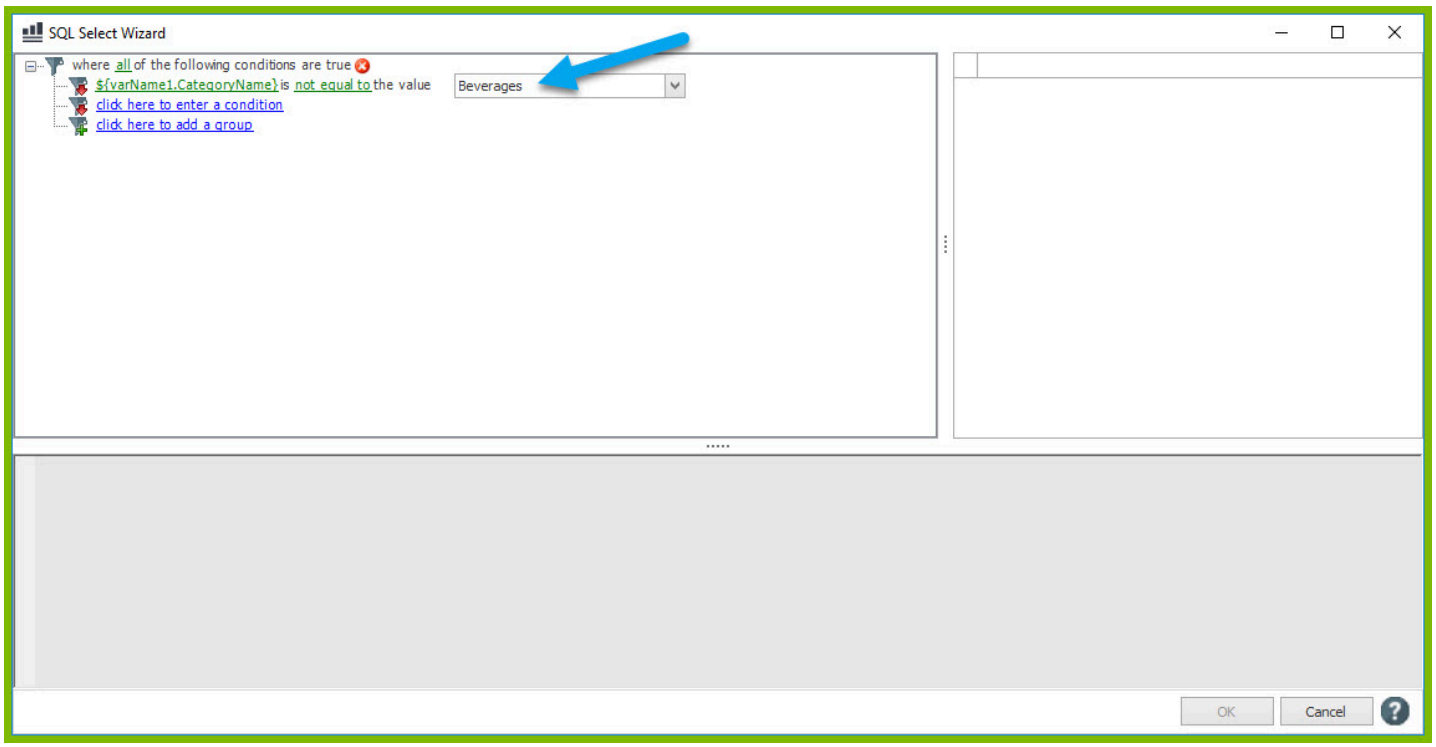
15. Select the line labeled "**equal to**" then select "**not equal**" from the dropdown.





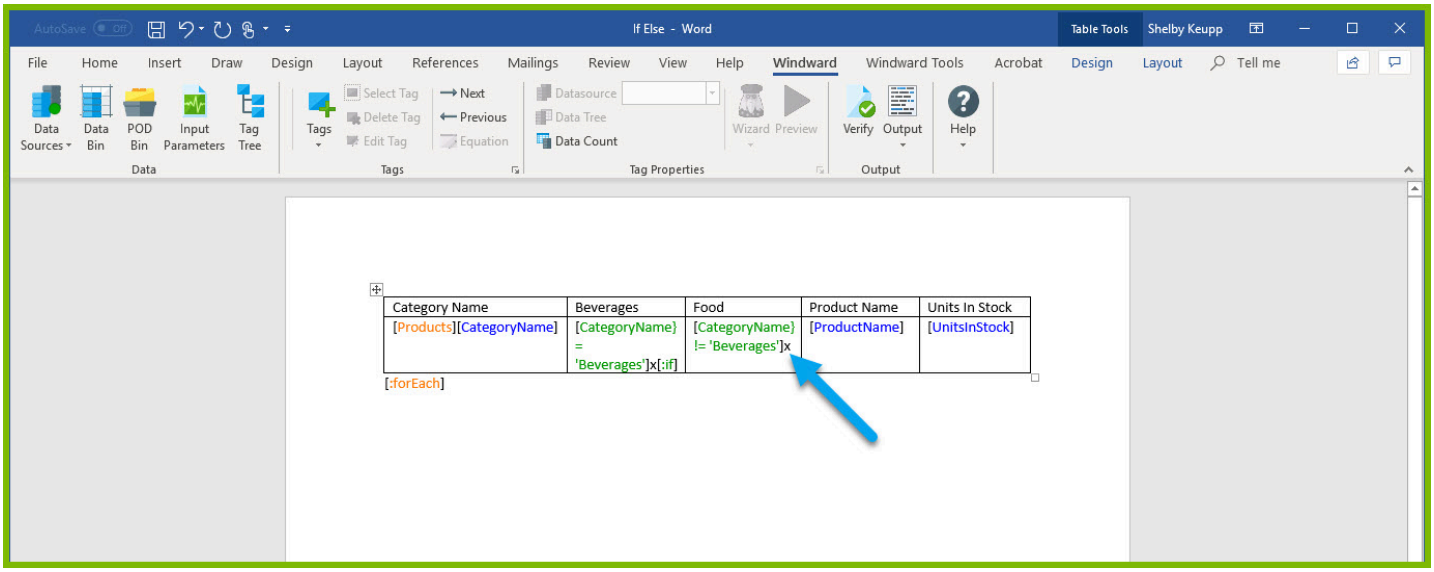
16. Select the line labeled "**click here to set the value**" and enter the value "Beverages" then press enter. Now select "**OK**" in the corner to exit the selection wizard.



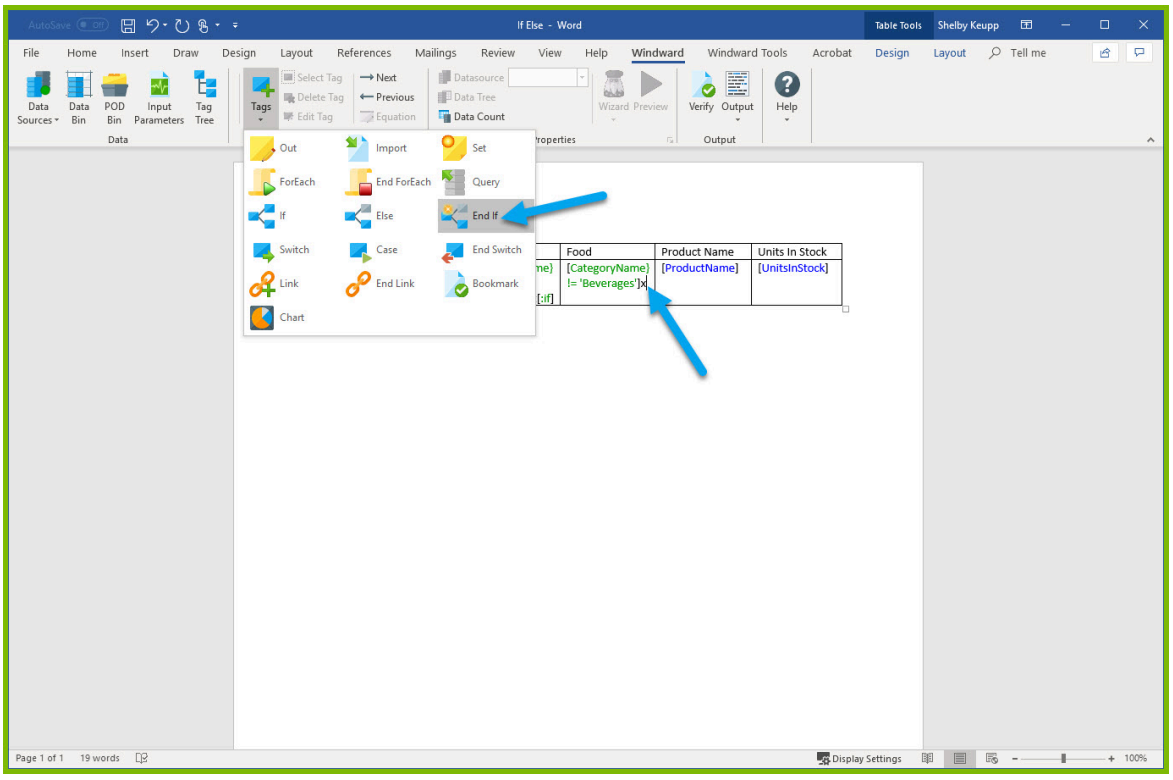


If the CategoryName is not equal to “Beverages,” then we want to denote that in the “Food” column.

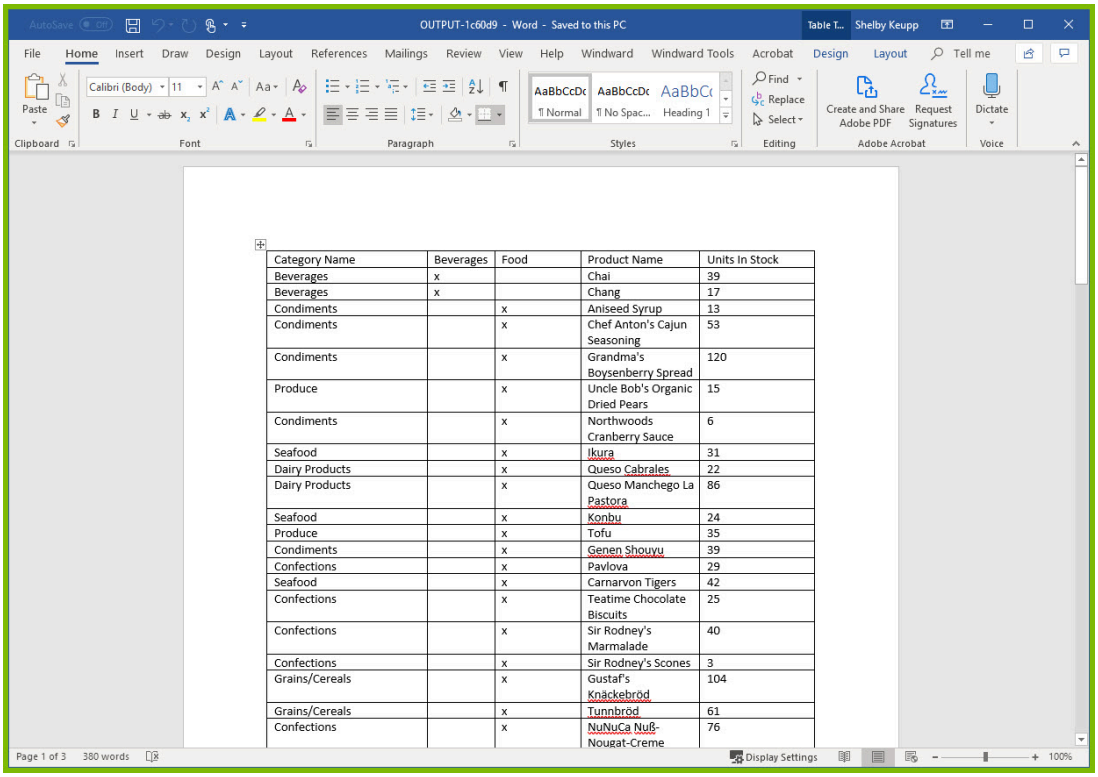
17. Place your cursor after the If tag, then type the letter “x.”



18. Place your cursor directly after the letter “x” and insert an **EndIf** tag.



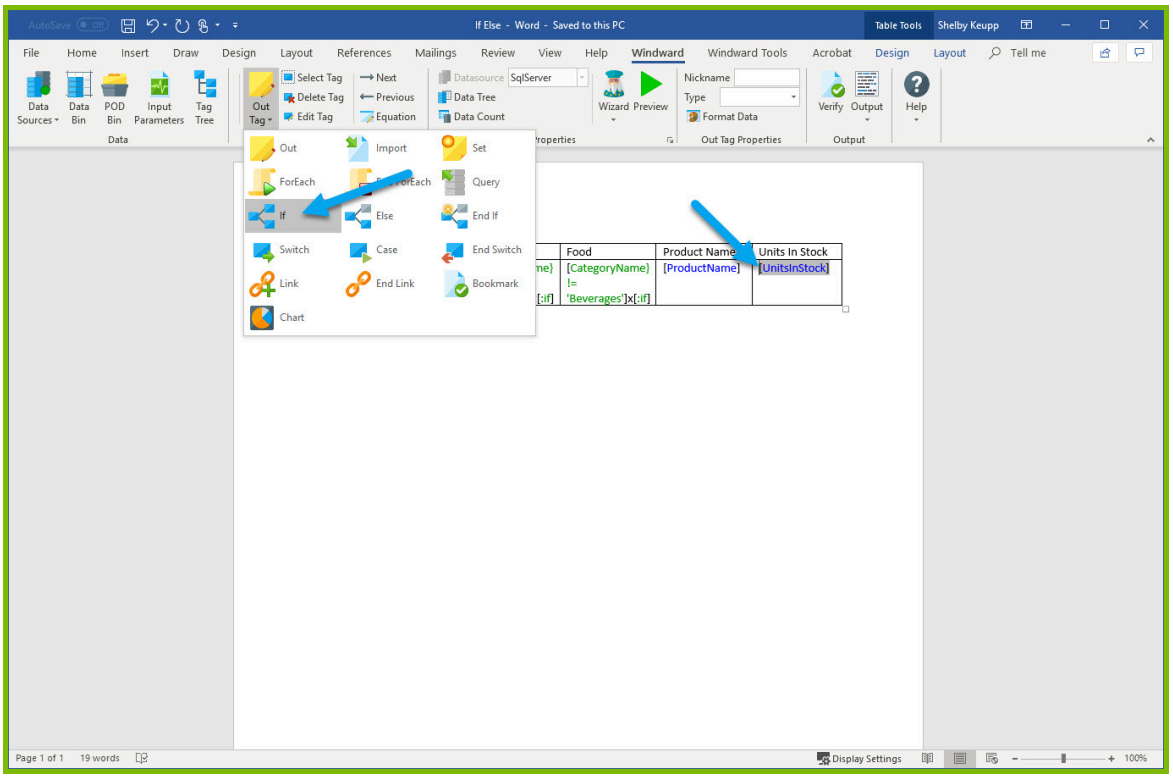
19. Save and output the template to DOCX output and see your results:



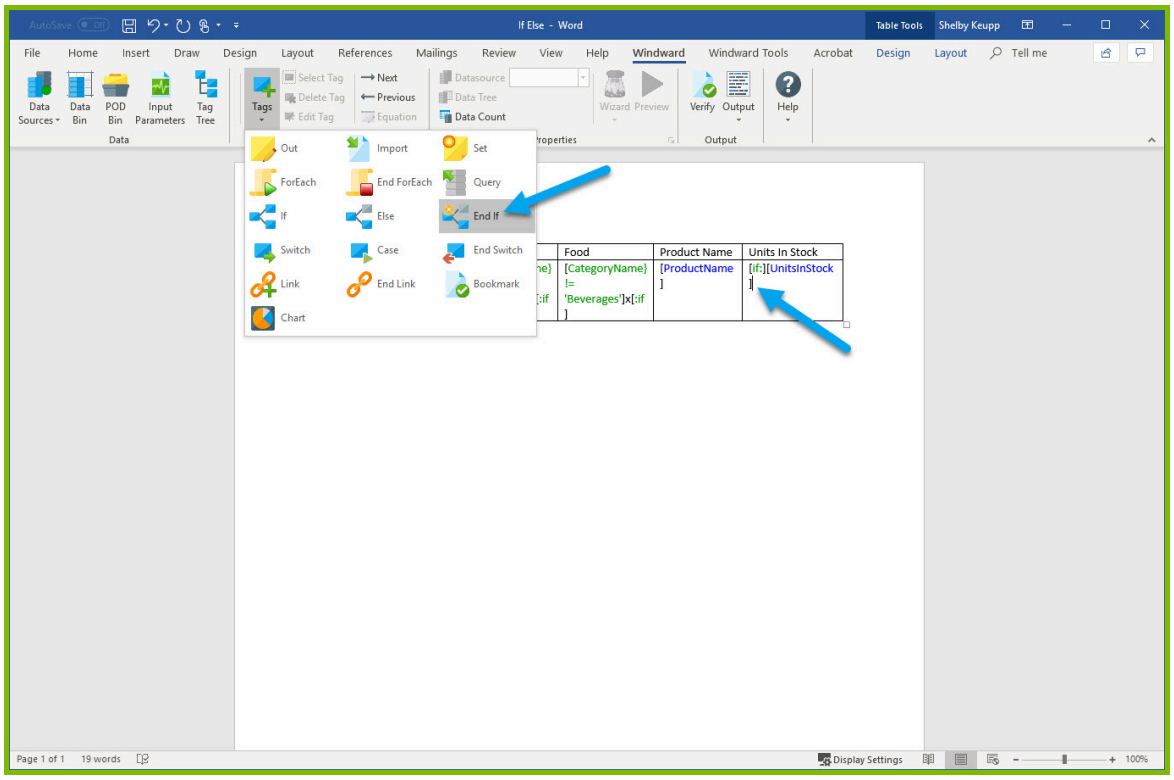
Category Name	Beverages	Food	Product Name	Units In Stock
Beverages	x		Chai	39
Beverages	x		Chang	17
Condiments		x	Aniseed Syrup	13
Condiments		x	Chef Anton's Cajun Seasoning	53
Condiments		x	Grandma's Boysenberry Spread	120
Produce		x	Uncle Bob's Organic Dried Pears	15
Condiments		x	Northwoods Cranberry Sauce	6
Seafood		x	Ikura	31
Dairy Products		x	Queso Cabrales	22
Dairy Products		x	Queso Manchego La Pastora	86
Seafood		x	Konbu	24
Produce		x	Tofu	35
Condiments		x	Genen Shouyu	39
Confections		x	Pavlova	29
Seafood		x	Carnarvon Tigers	42
Confections		x	Teatime Chocolate Biscuits	25
Confections		x	Sir Rodney's Marmalade	40
Confections		x	Sir Rodney's Scones	3
Grains/Cereals		x	Gustaf's Knäckebröd	104
Grains/Cereals		x	Tunnbröd	61
Confections		x	NuNuCa Nuß-Nougat-Creme	76

The resulting output shows an “x” in the column of “Beverages” for products that are beverages or an “x” in the column of “Food” if the products are food. Now we want to look at the “Units In Stock” column to determine which products need to be ordered.

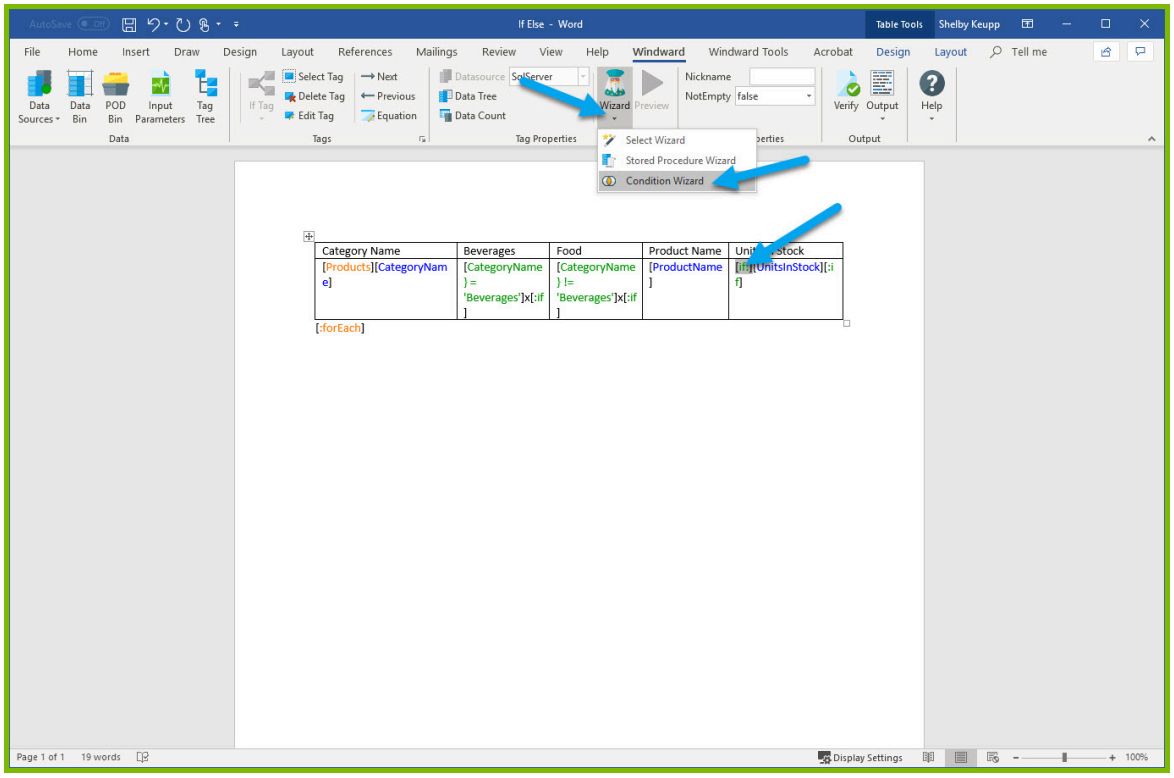
20. Place your cursor directly before the tag labeled UnitsInStock and insert an **If** tag.



21. Place your cursor directly after the tag labeled UnitsInStock and insert an **EndIf** tag.

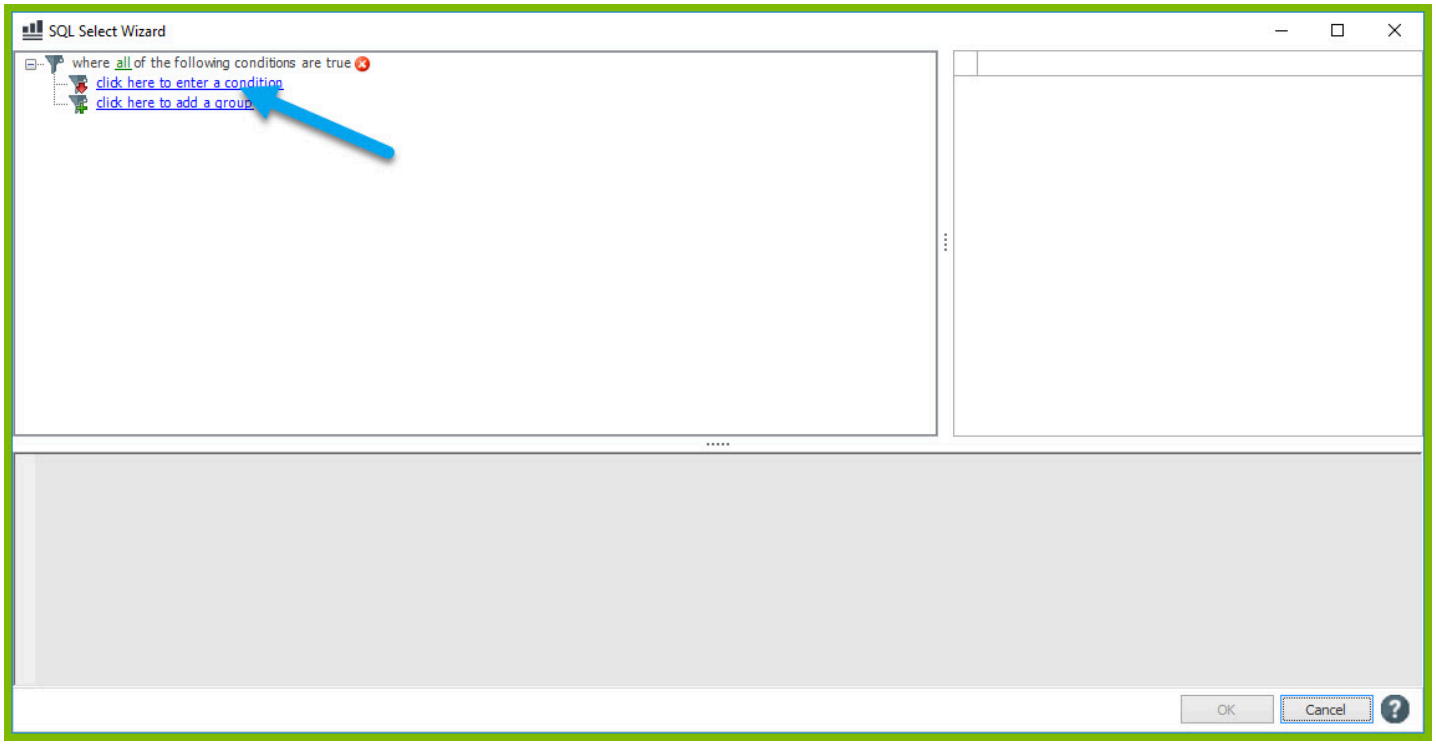


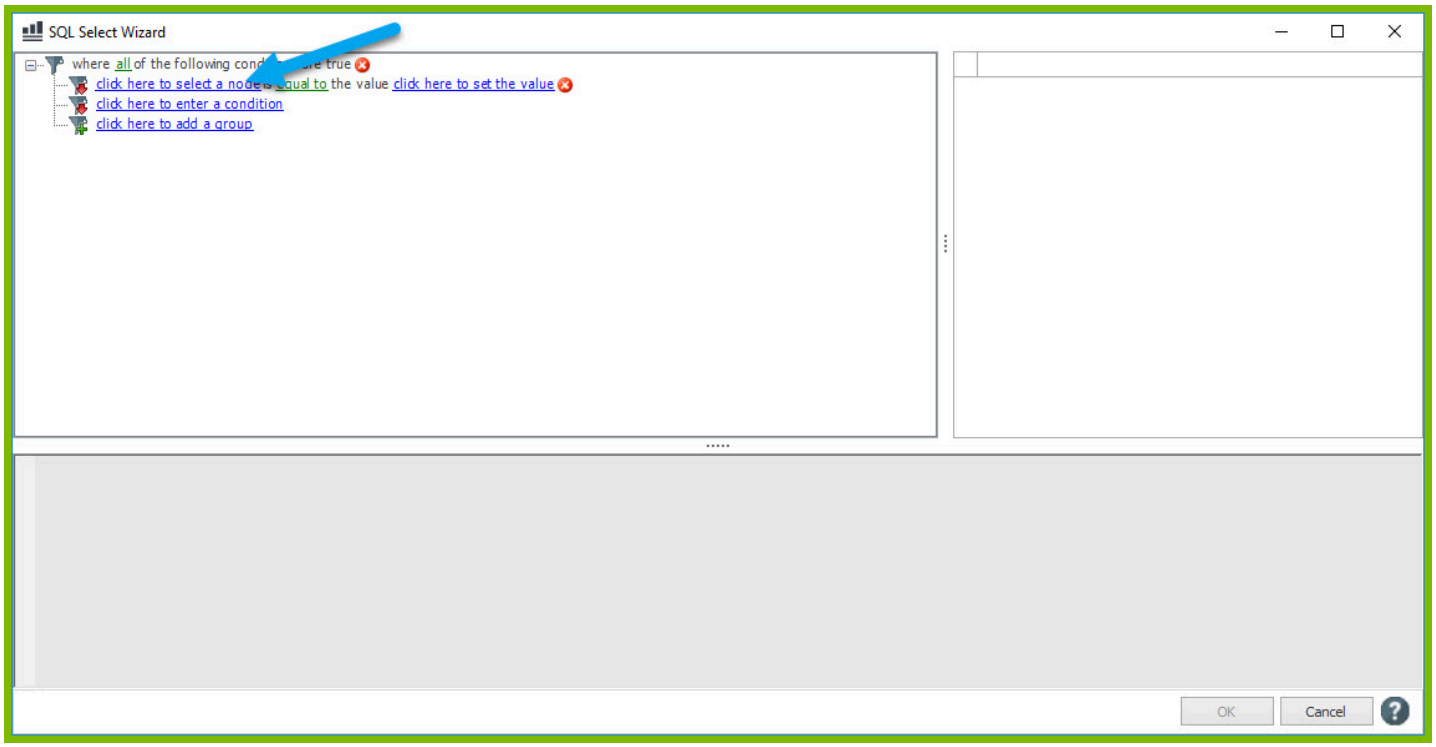
22. Place your cursor on the **If** tag that was inserted in your template and click the dropdown under the "**Wizard**" button in the Windward Ribbon, then select "**Condition Wizard**" from the dropdown options to open the Condition Wizard.



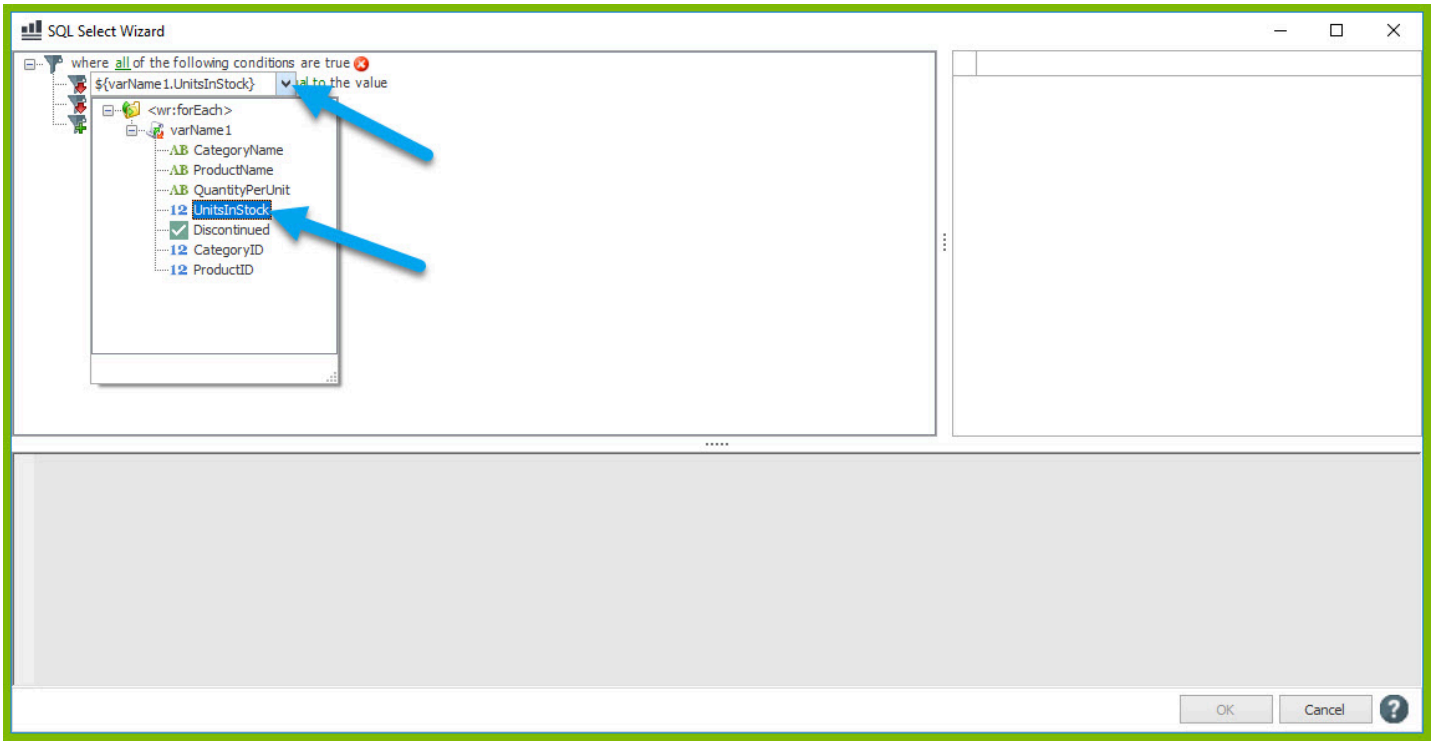
For UnitsInStock values that are greater than 15 we want to just output the UnitsInStock value, but for any UnitsInStock values less than or equal to 15 we want to show a value of “Need to Order” instead.

23. Select the line labeled “**click here to enter a condition**”, another line will appear in its place after selecting, now select the line labeled “**click here to select a node**” that appeared.

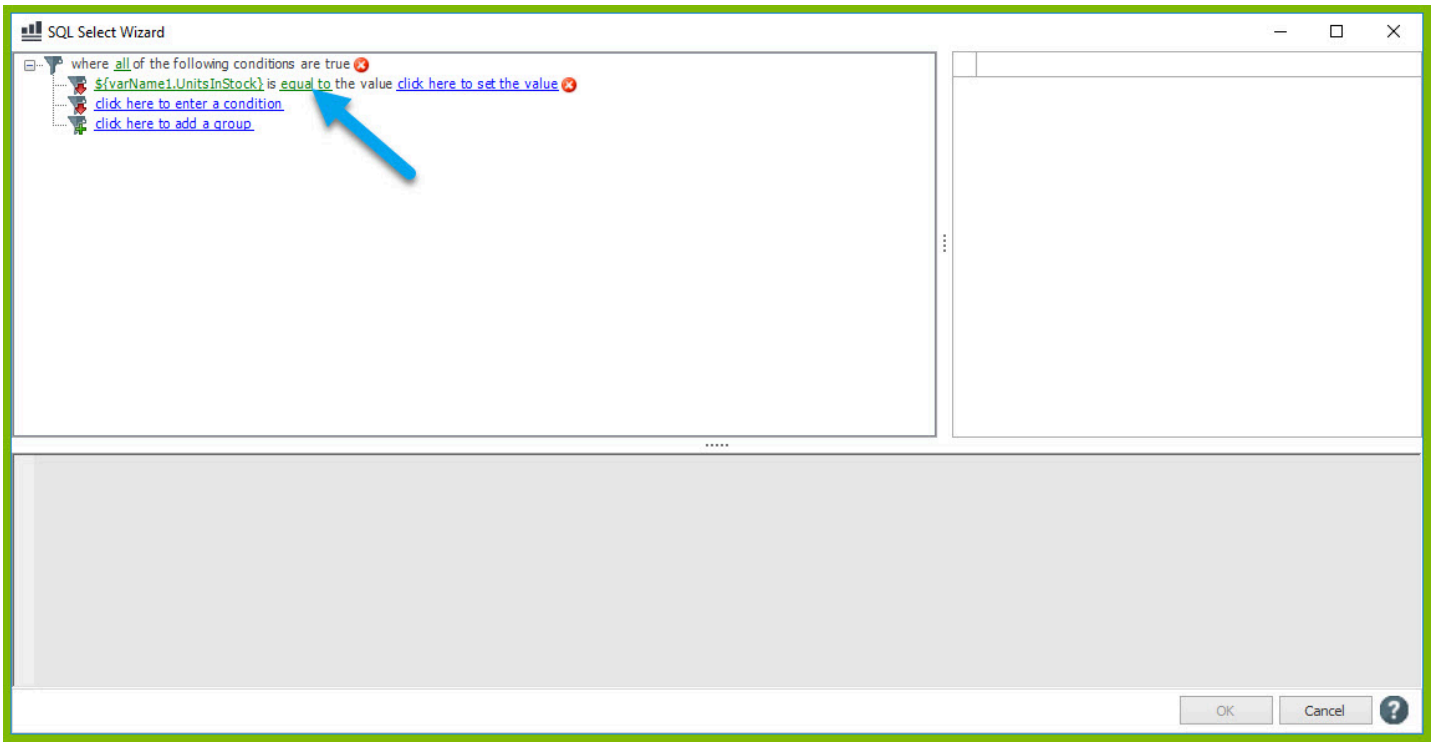


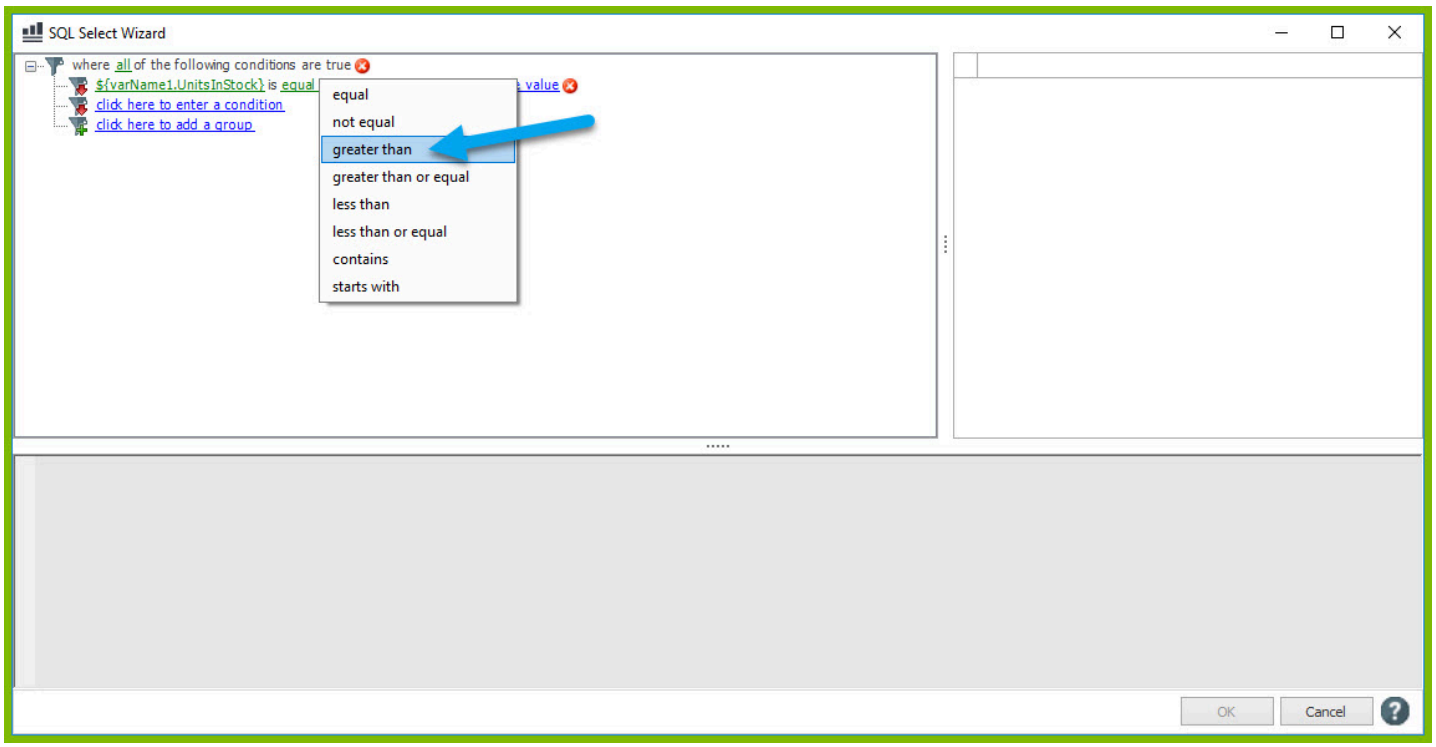


24. Using the dropdown available expand the Tag Tree, then expand varName1 and double-click the **“UnitsInStock”** node.

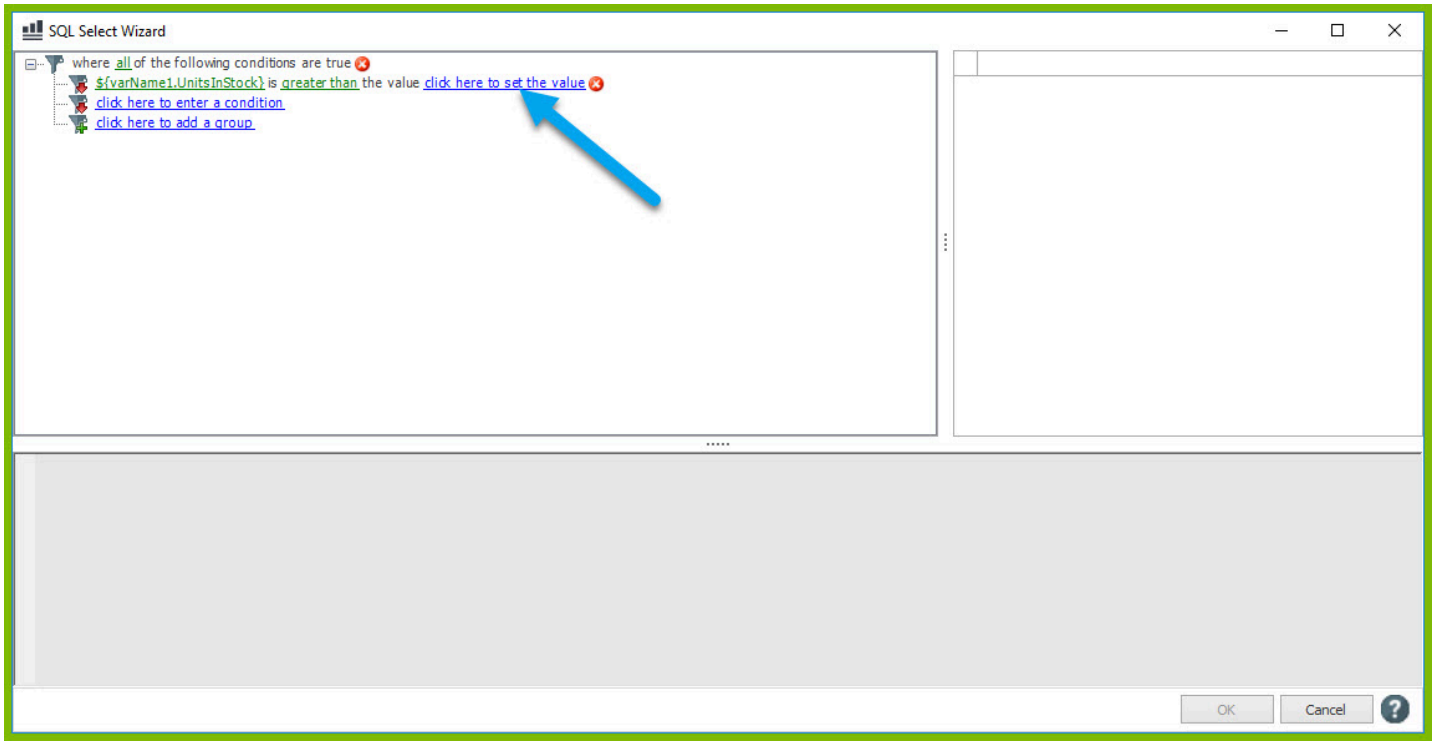


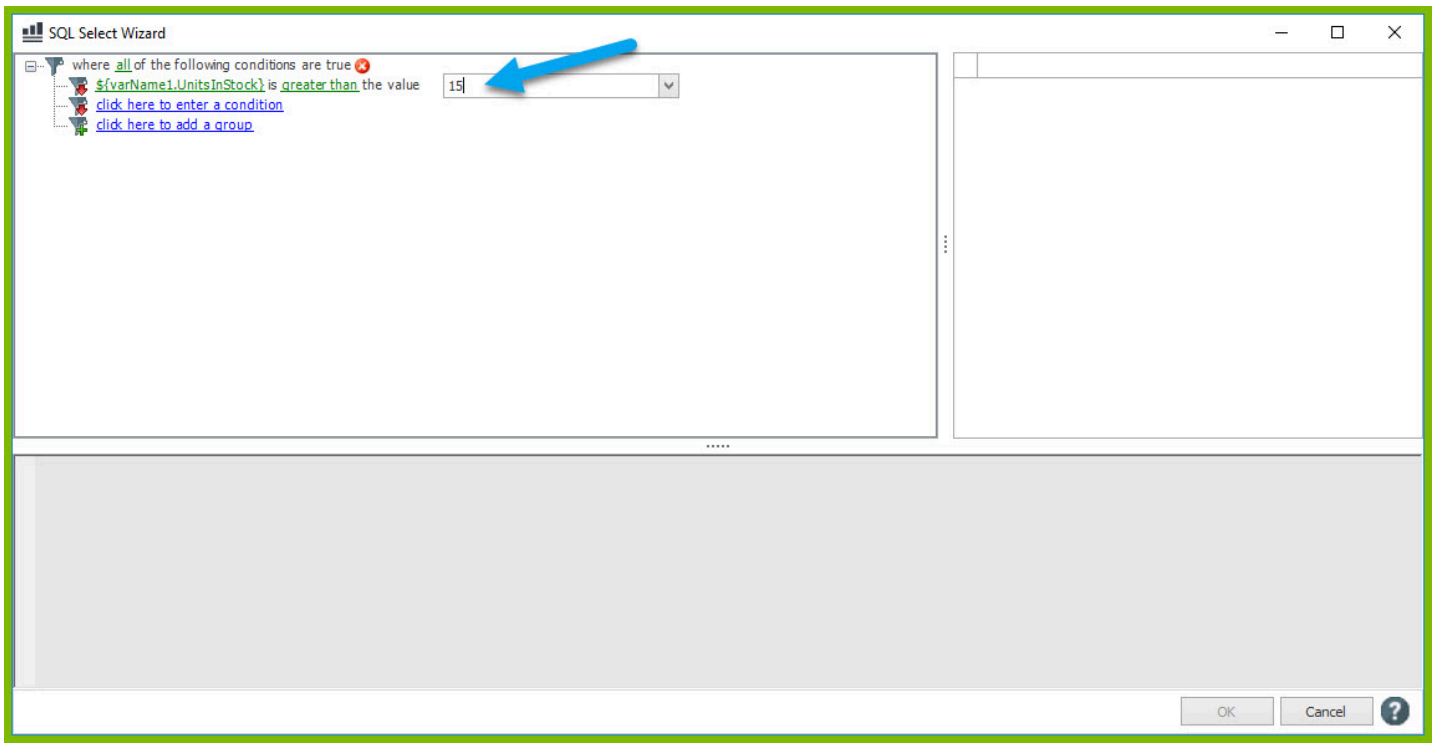
25. Select the line labeled "**equal to**" then select "**greater than**" from the dropdown.



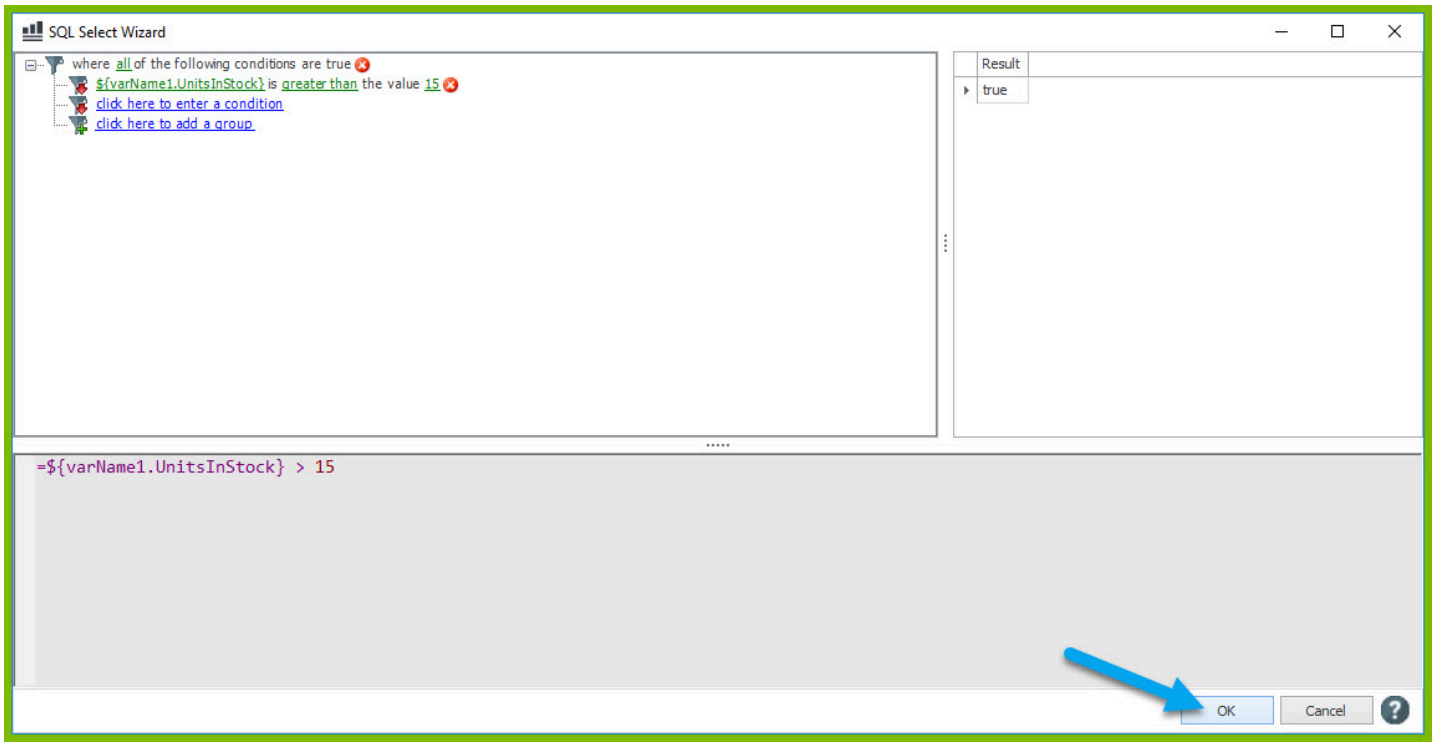


26. Select the line labeled "**click here to set the value**" and enter the value "15," then press enter.



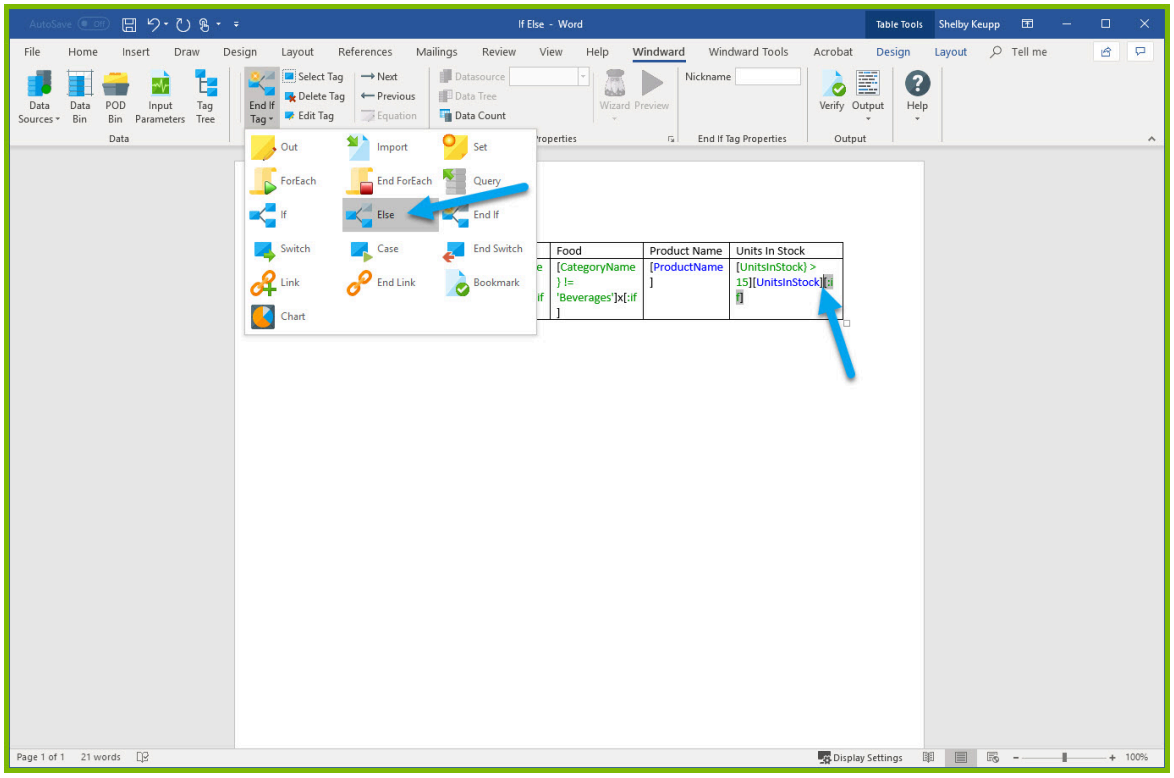


27. Select "**OK**" in the corner to exit the selection wizard.



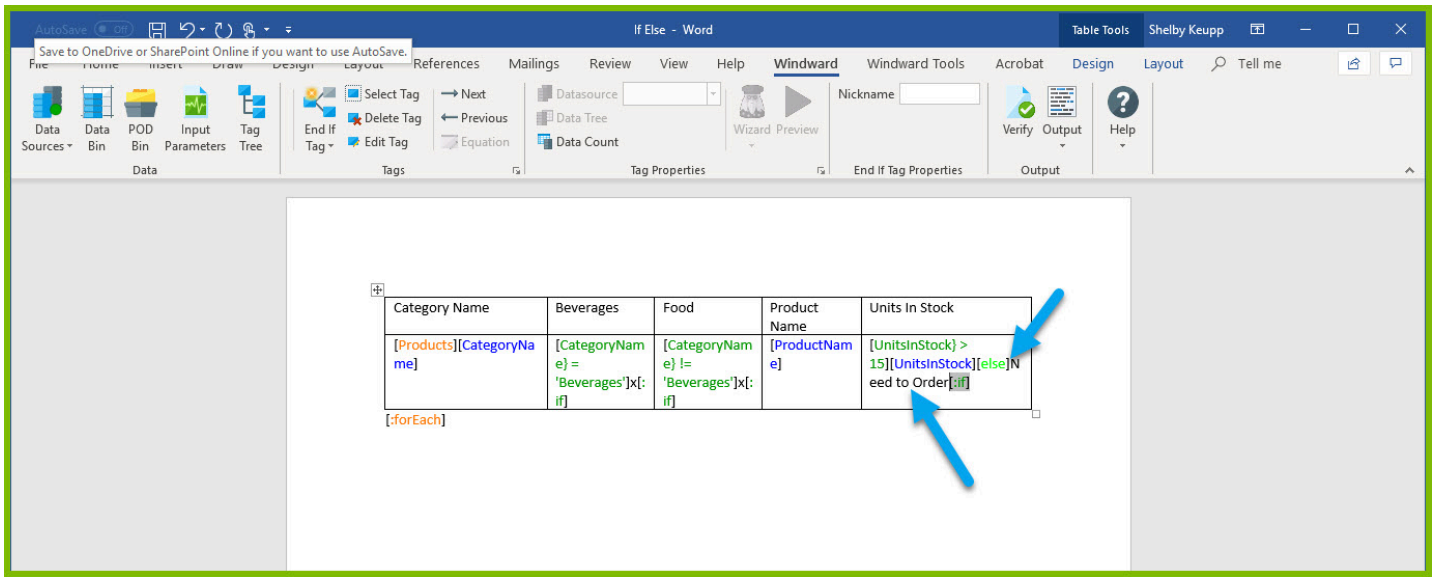
In order to change the values less than or equal to 15 to display "Need to Order," we will use an Else tag.

28. Place your cursor directly after the tag labeled UnitsInStock and insert an **Else** tag.

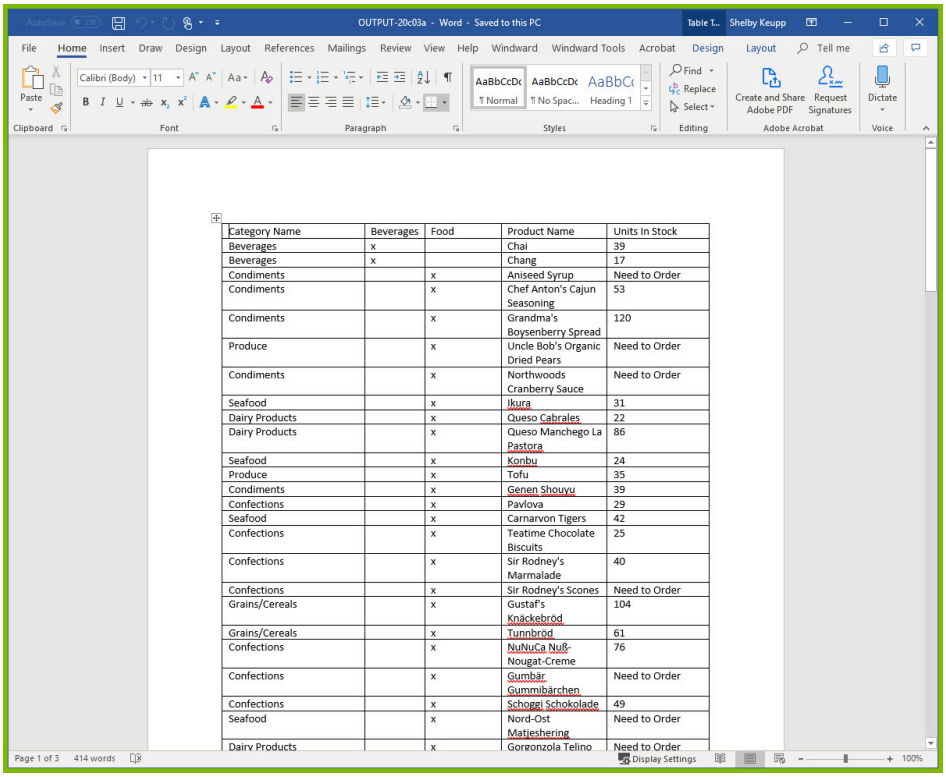


We use the Else tag to specify what to do if an If tag's condition evaluates to 'false.' If an If tag's condition evaluates to 'false,' then the tags and/or text between the Else tag and EndIf tag are processed. This means we need to place the text we want to output between the Else tag and EndIf tag.

29. Place your cursor directly after the Else tag and type the phrase "Need to Order."



30. Now you can output your finished template! Re-save your template and output to DOCX.



Category Name	Beverages	Food	Product Name	Units In Stock
Beverages	x		Chai	39
Beverages	x		Chang	17
Condiments		x	Aniseed Syrup	Need to Order
Condiments		x	Chef Anton's Cajun Seasoning	53
Condiments		x	Grandma's Boysenberry Spread	120
Produce		x	Uncle Bob's Organic Dried Pears	Need to Order
Condiments		x	Northwoods Cranberry Sauce	Need to Order
Seafood		x	Ikura	31
Dairy Products		x	Queso Cabrales	22
Dairy Products		x	Queso Manchego La Pastora	86
Seafood		x	Konbu	24
Produce		x	Tofu	35
Condiments		x	Genen Shouyu	39
Confections		x	Pavlova	29
Seafood		x	Carnarvon Tigers	42
Confections		x	Teatime Chocolate Biscuits	25
Confections		x	Sir Rodney's Marmalade	40
Confections		x	Sir Rodney's Scones	Need to Order
Grains/Cereals		x	Gustaf's Knäckebröd	104
Grains/Cereals		x	Tunnbröd	61
Confections		x	NuNuCa Nuß-Nougat-Creme	76
Confections		x	Gumbär Gummibärchen	Need to Order
Confections		x	Schoggi Schokolade	49
Seafood		x	Nord-Ost Matjeshering	Need to Order
Dairy Products		x	Gorgonzola Telino	Need to Order

Next Steps

Now that you have finished this introduction tutorial, here are some resources we recommend you visit next:

1. How to connect to SQL datasources
2. How to use the XPath Wizard
3. The Windward Tutor: A collection of short video tutorials

Creating an Invoice in Windward Designer

This multi-part tutorial will walk you through creating a finished invoice template in Windward Designer. The videos below walk users through creating a sample invoice in detail, starting with some Microsoft Word basics and ending with an example of a completed invoice.

Part 1

The first part of this tutorial walks users through necessary layout functionality in Microsoft Word and shows users how to connect to a datasource within the Windward Designer.

Part 2

The second part of this tutorial dives into creating input parameters, generating dynamic values from a datasource, and using the SQL Select Wizard.

Part 3

The third part of this tutorial continues to give examples of generating values from a datasource, touches on additional layout functionality within Word that's necessary to create the sample invoice, and changing the output format of number and date values.

Part 4

The fourth part of this tutorial uses information explained in the previous videos to add more information to the sample invoice, and also gives an example of using a forEach tag.

Part 5

The fifth part of this tutorial continues to create the sample invoice while introducing the equations feature that allows for users to combine multiple datasources fields together.

Part 6

The sixth part of this tutorial demonstrates how to use the previous queries for multiple purposes to save time, and also gives an example of creating an equation to sum variable fields together.

Part 7

The final part of this tutorial finalizes the sample invoice, including discussing if tags, presents the final product, and shows example outputs.

Advanced

Template Layout Best Practices

Here are some tips for making your output identical to your report template.

Details

Windward tries to make template output pixel-for-pixel identical with the created template. However, it will never be perfect.

The best way to approach your template is with the idea that while you are building it, it is an ever-changing document based on the amount of data that is being pulled from your data source; as opposed to something like a painting, which has a permanent size and permanent placement. With a painting, you can put something in an exact spot on the canvas and everything stays the same size or in the same place no matter what changes may be made elsewhere.

Whereas with a Windward Tagged template, you are creating a flowing stream of paragraphs, images, tables, one after the other, which vary in size and length (depending on the data you tell it to retrieve).

- When Windward is generating your output, it starts at the top and follows the instructions of each Tag it encounters until it reaches the end of your template.
- Each item (paragraph, images, tables, etc.) has properties about how it follows the preceding item and how the next item should follow it, so the actual size of the output can change each time you run a report.
- Some of these items' properties are affected by settings you implement in Office, while some are set up in the Tag Editor of a specific Tag. Settings can be in conflict with each other, or can produce results you were not anticipating.

Explanation of Differences

Some (not all) of the reasons for differences are:

- Office itself will format slightly differently based on the graphics and printer drivers on a system.
- Office lays out documents slightly differently from what their spec says it should do--these differences are not documented and Microsoft itself generally does not know exactly how Word/Excel is calculating the placement of text.
- Most measurements come from the text metrics provided by the True Type fonts on a system. Different systems provide different numbers for the same font. The same font file provides different numbers on different operating systems. If these differ, the output will differ.

- PDF output is not rendered as documented. In a PDF file if you tell it to render a square 1" x 1" we have seen it do everything from 0.9" x 0.9" to 1.05" x 1.05". It appears to depend on the graphics card and printer driver.
- The layout (soft line break, soft page breaks, etc.) is performed using the font metrics of the fonts installed on the system generating the report. If a font specified in the template does not exist on the server where output is generated, then Windward has to substitute a font that *is* installed. This substituted font will generally have different font metric values, and that will affect the appearance of the layout. (Starting in version 13 you can define what existing font should be used for a missing font.)
- PDF output has no concept of a border, just a polyline. A polyline is a continuous line of constant width and color that is composed of several line segments. PDF output will join all segments smoothly. And if the line ends where it starts, it will join the ends of the line. But if a border changes width, color, style as it is being drawn, one polyline ends and another starts. Even though they end/start at the same location, they are not joined. In addition, internal borders between cells are not joined to the outer border.

Guidelines

In almost all cases you can easily work with the constraints if you follow these guidelines:

1. When you need a page break, put in a hard page break. Do not depend on the page layout to put in a soft page break. Do the same for line breaks, column breaks, etc.
2. Absolutely-positioned objects can cause problems as they don't move when the data is merged in. That can be a problem as the merged-in data needs to adjust other objects to take their placement into account. Avoid absolutely-positioned objects whenever possible. Positioning relative to a paragraph, column, (margin for X position) are all fine. **Positioning relative to the page or margin on the Y axis is strongly discouraged. When using any Engine to generate a DOCX report, absolutely-positioned Word tables will *not* break across pages.**
3. Use appropriate paragraph settings for "keep with/together" and table "row header." If you create three rows or three paragraphs with Tags in the template, the output can be 150 rows or 150 paragraphs! Just remember that those three rows/paragraphs with your Tags may all fit on one page, but the final output may not fit on one page.
4. Set column widths in tables using set values (inches, centimeters, points) or percentages. **If you use autofit it will not match because Microsoft is not sure how Word does that**. Excel column widths will always be a little off because of how Excel calculates them.
5. Use TrueType and OpenType fonts. If you use other types of fonts, there are limits with what can be done with them and they are closely tied to their code page.
6. For PDF table borders Windward draws a polyline for the outer border, a polyline for each internal row border and a polyline for each internal column border. **Whenever possible, keep each individual polyline to the same width, color, and style.**
7. RTF is no longer a supported template format--please use DOCX, XLSX, or PPTX instead. The RTF format is very poorly defined and Word does not follow it in many cases. DOCX is well defined and Word mostly follows it. So an RTF template is more likely to be problematic.
8. Minimize the use of nested tables. If you want a border around a page, do not create a table for the entire page containing the page contents - use the page border. Nested tables are

very useful and well supported, so this is a matter of appropriate use, not trying to avoid them. **But when you have two approaches and one does not use an additional nested table, use that approach.**

9. Leave a little room on each page. If you cram everything you can onto a page and it barely holds it all before the page break, sooner or later you will generate output on a system where the fonts are a little larger and your one page output is now two pages.

These tips should help prevent and correct minor formatting issues and discrepancies between the document on your screen and the Output.