ONLYOFFICE

OFORMs for document automation and collaboration

Speaker: **Oleksii Ivanov**

March 2023

www.onlyoffice.com

About ONLYOFFICE project

Company

Ascensio System SIA

Latvia (Riga)

Divisions

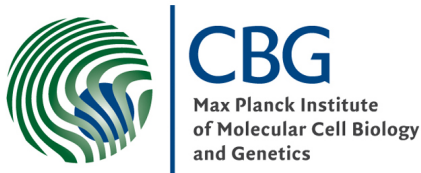UK (London)

USA (Dallas, TX)

Singapore

Armenia (Yerevan)

Uzbekistan (Tashkent)

Serbia (Belgrade)

Trusted by over 10M+ users worldwide

CS3 Site Reports, December 2022: 61% of organizations employ ONLYOFFICE Docs

About ONLYOFFICE project

Products

ONLYOFFICE Docs
ONLYOFFICE Workspace

Solutions for

SaaS, On-premises, Desktop, Mobile

Supported platforms
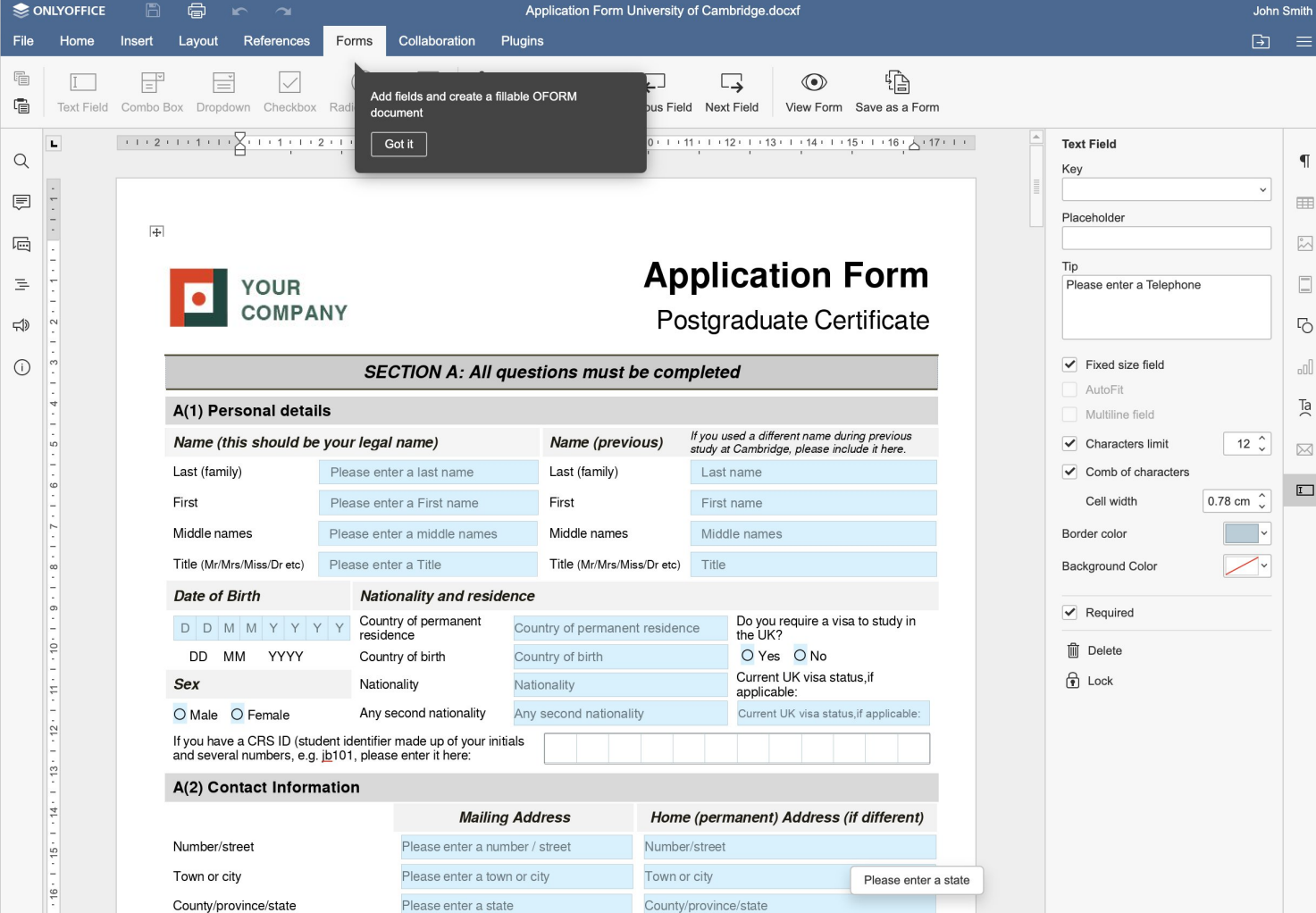
Windows, Linux, macOS, Android, iOS

License

Open source / commercial

What are OFORMs?

- Form building and configuration

- Collaboration & sharing

- OOXML-compatible formats: DOCXF and OFORM

- Plugins and macros

- Form protection

- Flexible export options

- Web, desktop, and mobile

- Easy integration in any environment

Form building and configuration
Word processing instruments

- **Full set of editing and formatting tools:** all operations with fonts and styles, paragraph and text formatting

- **Creating and customizing all kinds of objects:** shapes, charts, tables and text boxes

- **Academic features:** footnotes, endnotes, table of contents, bookmarks

- Collection of **plugins** (Draw,io, OCR, Translator, Highlight Code etc.)

Form building and configuration
Field types by data format

- Text area

Form building and configuration
Field types by data format

- Text area
- Combo box

Forms

| Text Field | Combo Box | Dropdown | Checkbox | Radio Button | Image |

Personal details

Last name — *Rayan*

First name — *Elizabeth*

Title (Mr/Mrs/Miss/Dr) — *Miss* ▼

Date of birth — D D M

Choose a title

Mr

Mrs

Miss

Dr

etc

Form building and configuration
Field types by data format

- Text area
- Combo box
- Drop-down list

Field types by data format

- Text area
- Combo box
- Drop-down list
- Check box

Forms

Text Field	Combo Box	Dropdown	Checkbox	Radio Button	Image

I confirm that I am:

Teaching in primary care   Yes

Teaching in secondary care   Yes ✓

Teaching in tertiary care   Yes

Form building and configuration
Field types by data format

- Text area
- Combo box
- Drop-down list
- Check box
- Radio button

Forms

Text Field	Combo Box	Dropdown	Checkbox	Radio Button	Image

Personal details

Title (Mr/Mrs/Miss/Dr)   *Miss*

Date of birth   D D M M Y Y Y Y

Country of birth   *Canada*

Sex   Male   ● Female

Form building and configuration
Field types by data format

- Text area
- Combo box
- Drop-down list
- Check box
- Radio button
- Image

Forms

| Text Field | Combo Box | Dropdown | Checkbox | Radio Button | Image |

Please affix your photograph here

Select Image

From File
From URL
From Storage

Field types by data format

- Text area
- Combo box
- Drop-down list
- Check box
- Radio button
- Image
- Email address

NEW

Forms

| Checkbox | Radio Button | Image | Email Address | Phone Number | Complex Field |

user_name@email.com

Text Field

Key

Placeholder

Choose a title

Tip

Title

Format

Regular Expression

\S+@\S+\.\S+

Allowed Symbols

☑ Fixed size field

☐ AutoFit

☐ Multiline field
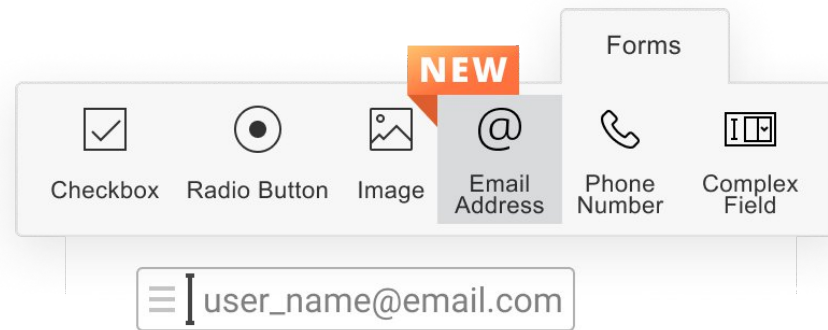
Field types by data format
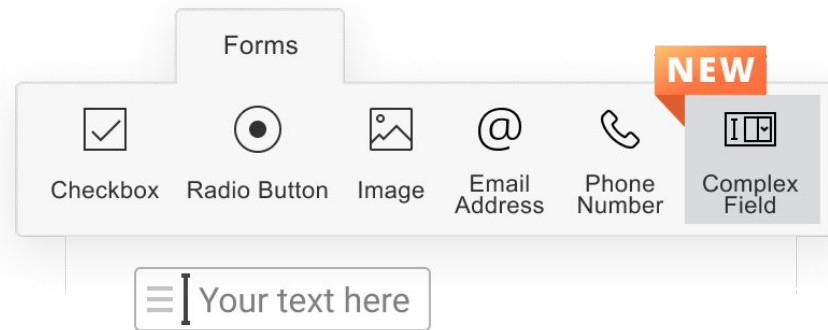
- Text area
- Combo box
- Drop-down list
- Check box
- Radio button
- Image
- Email address
- Phone number

Field types by data format

- Text area
- Combo box
- Drop-down list
- Check box
- Radio button
- Image
- Email address
- Phone number
- Complex field

Forms

Checkbox | Radio Button | Image | Email Address | Phone Number | **NEW** Complex Field

☰ Your text here

Text Field

Key

Placeholder

Your text here

Tag

Tip

Title

☐ Fixed size field

Border color

Background color

☐ Required

🗑 Delete

Field types by data format

- Text area
- Combo box
- Drop-down list
- Check box
- Radio button
- Image
- Email address
- Phone number
- Complex field

NEW **Date & Time**

Form building and configuration
Field types by data format

- Text area
- Combo box
- Drop-down list
- Check box
- Radio button
- Image
- Email address
- Phone number
- Complex field
- **NEW** **Date & Time**
- **ZIP code**

Format

Arbitrary Mask

99999-9999

Phone Number (e.g. (123) 456-7890)

Phone Number (e.g. +447911123456)

US Zip Code (e.g. 92663 or 92663-1234)

US SSN (e.g. 123-45-6789)

UK Passport Number (e.g. 925665416)

Credit Card Number (e.g 4111-1111-1111-1111)

Field types by data format

- Text area
- Combo box
- Drop-down list
- Check box
- Radio button
- Image
- Email address
- Phone number
- Complex field

NEW **Date & Time**

- **ZIP code**
- **Credit Card**

Format

| Arbitrary Mask | ⌄ |

| 9999-9999-9999-9999 | ⌄ |

Phone Number (e.g. (123) 456-7890)

Phone Number (e.g. +447911123456)

US Zip Code (e.g. 92663 or 92663-1234)

US SSN (e.g. 123-45-6789)

UK Passport Number (e.g. 925665416)

Credit Card Number (e.g 4111-1111-1111-1111)

Form building and configuration
Field properties

- Placeholders

- Character limit configuration

- Automatic field resizing to fit the text

- Required character combinations

- Allowed symbols

- Format (None/Digits/Letters/Arbitrary Mask/Regular Expression)

- Border, background and highlighting colors

Form building and configuration
User roles NEW

Create and assign various recipient roles for field filling to simplify document workflow.

Manage Roles ×

Add roles and set the order in which the fillers receive and sign the document

1	■	Legal advisor	12
2	■	Buyer	5
3	■	Seller	4
4	■	Notary	2

New   Edit   Delete

Close

Form building and configuration
User roles `NEW`

Assign the created roles to each field to indicate which of them should be filled out by each participant.

Form building and configuration
User roles `NEW`

Users will be able to visually identify which fields they should fill in depending on the role-matching colors.

SALES AGREEMENT

This Sales Agreement (this "**Agreement**") is entered into as of the this Enter the date Day of Enter the month, 2021, by and among/between:

Seller(s):Enter full name Seller , located at Enter the address (collectively "Seller") and

Buyer(s): Enter full name Buyer, located at Enter the address (collectively "Buyer").

Each Seller and Buyer may be referred to in this Agreement individually as a "Party" and collectively as the "Parties."

1. Sale of Goods. Seller agrees to sell, and Buyer agrees to purchase the following items in the following quantities and at the prices (the "Goods"):

Other Details: Other Details:

2. Purchase Price. Buyer will pay to Seller for the Goods and for all obligations specified in this Agreement, if any, as the full and complete purchase price, the sum of $Enter the sum of $. Unless otherwise stated, *(Check one)*
- ○ Seller
- ○ Buyer

shall be responsible for all taxes in connection with the purchase of Goods in this Agreement.

Plugins and macros for form building and filling

- Open API for OFORM plugins: connect external applications as content or data sources
- JavaScript macros for working with data in OFORMs and automated form drafting

Ready macro examples:

- Assigning unique form IDs

- Converting TXT/CSV data into a combo box

Collaboration in forms
Real-time co-editing and collaboration

- Two co-editing modes

- Commenting & mentions

- Reviewing & version history

- Chat, Telegram, Zoom, Rainbow & Jitsi

Collaboration in forms
Sharing and filling internally and externally

OOXML-compatible formats: DOCXF and OFORM

Export to PDF, DOCX, and more for working in external apps
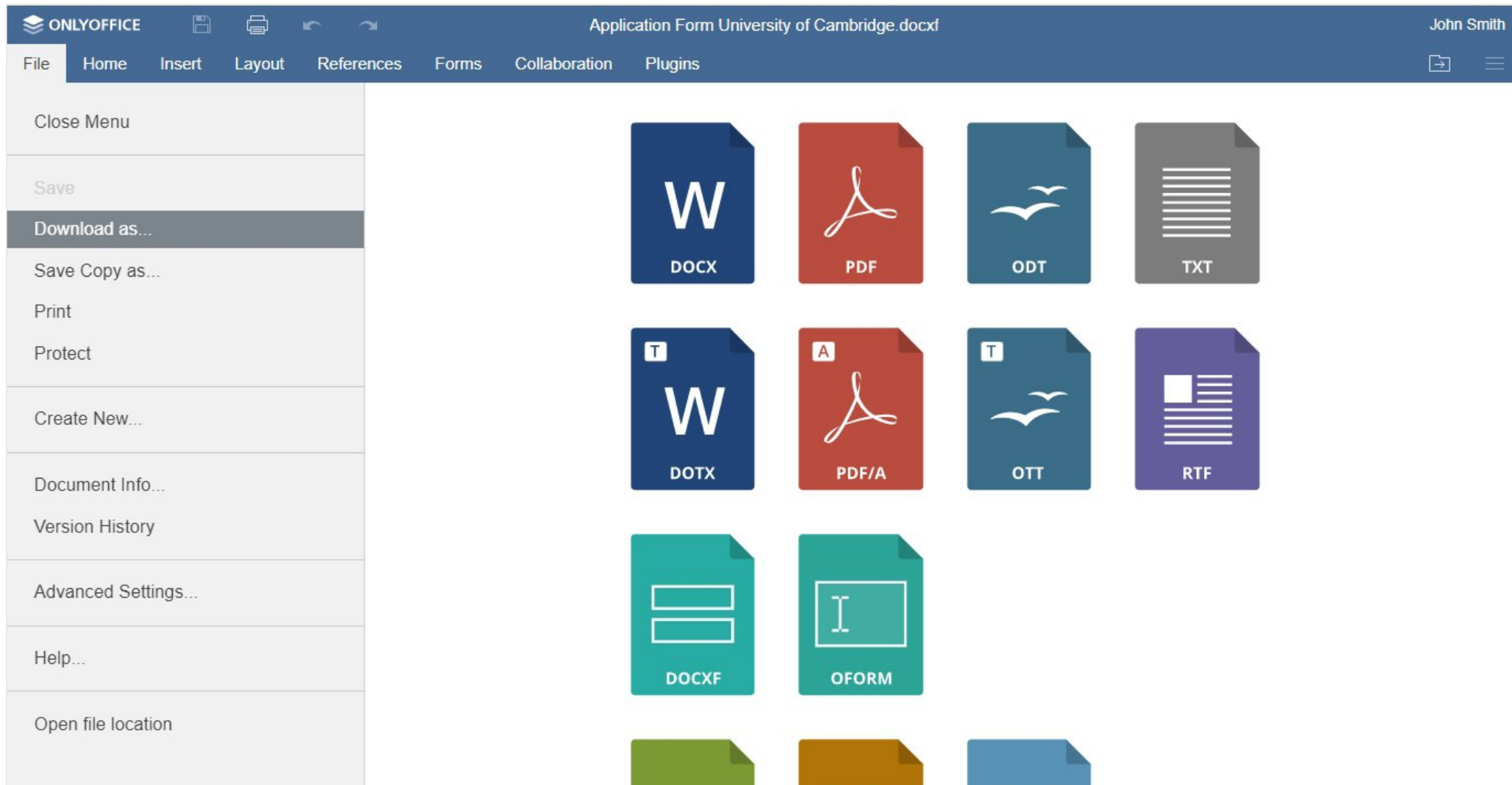
Form protection: data security in ONLYOFFICE Docs

- **Document access control:**

  - password protection
  - e-signatures
  - JWT protection
  - flexible permissions
  - watermarking
  - copy/download/print restriction

- **Self-hosted solution**

  - HTTPS data encryption in transit
  - End-to-end document encryption

Form protection

Coming soon:

- Ability to set recipient roles with restrictions

- E-signatures

OFORMs for document automation: scenarios by environment

Within organization

- Integration via connectors
- ONLYOFFICE Workspace

Applications and websites

ONLYOFFICE Docs API

Front desk

ONLYOFFICE DocSpace   Coming soon

Document automation in your organization

- **ONLYOFFICE Workspace**
- **Third-party DMS, CMS, and LMS:**

NEW

ownCloud

Liferay

REDMINE
flexible project management

moodle

Nextcloud

NUXEO

Chamilo
E-Learning & Collaboration Software

Drupal™

SharePoint

HumHub

Jira Software

strapi

Seafile™

Alfresco™

Confluence

WordPress

OFORMs integration example:
ownCloud

- Form editing and collaboration

- Advanced document permissions

- Federated cloud sharing

- Interface customization

- ownCloud Online and ownCloud Infinite Scale support

OFORMs integration example:
Moodle

- File attachments in courses

- Editing and collaboration on course documents

- Assignments within courses with file submission requests

- Automated form distribution via Assignments: backend DOCXF-to-OFORM conversion

Document automation in applications and websites

Example: ONLYOFFICE form library

Document automation in applications and websites

- Form creation via ONLYOFFICE Docs interface or the app's custom interface via Automation API

- SaaS / on-premises development models

- Automated Document generation with Document Builder

- Built in more than 200 web services
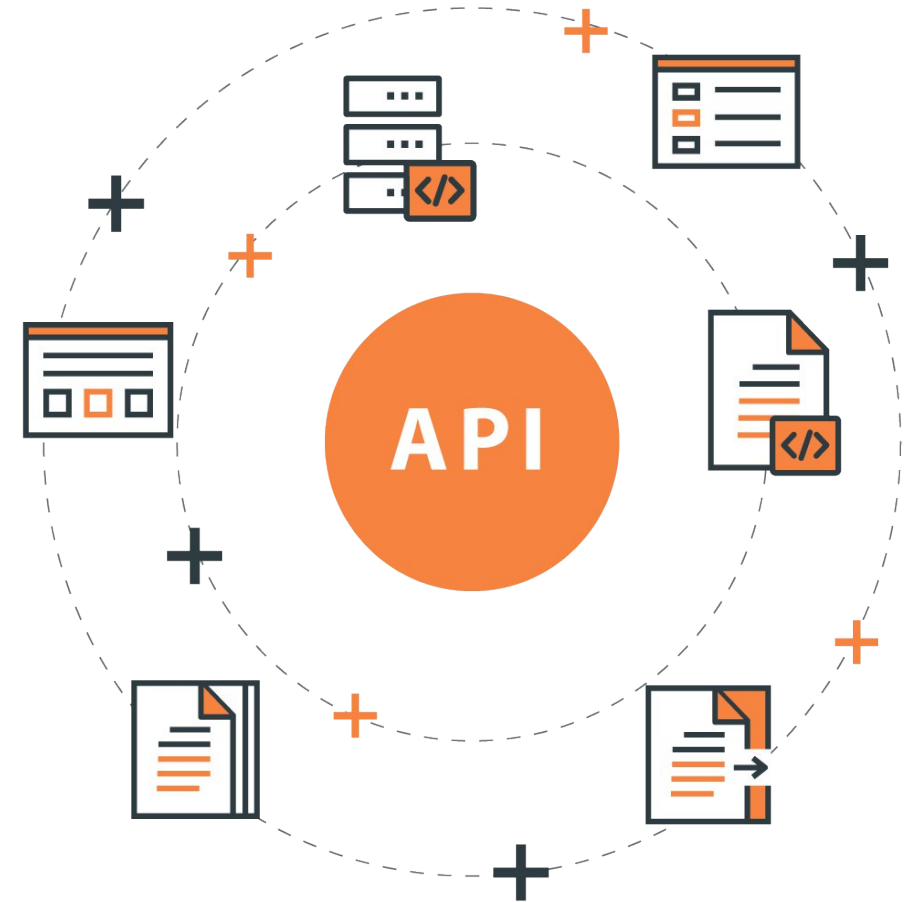
Document automation in applications and websites
Filling via custom interface using Automation API

- Ability to create a connector (class) to access documents directly from any web interface

- Customization: methods to place any controls within the interface

- Available in the Developer Edition Automation API package

- Example scenarios: web form filling, instant content creation, registration of attendees, legal document generation

Document automation via front desk
ONLYOFFICE DocSpace

Upcoming in early 2023

- Secure document sharing and collaboration space

- ONLYOFFICE Docs built-in

- Room-based collaboration

- Standard and Private rooms

- Role management and access control

- External/internal sharing

- E2E encryption

- Connection to desktop & mobile apps

- SaaS / on-premises deployment

ONLYOFFICE Docs in 2022-2023

4 major releases (versions 7.0, 7.1, 7.2, 7.3) + 5 intermediate hotfixes

- ARM compatibility
- New viewer for PDF, XPS and DjVu files
- Print preview in spreadsheets
- Animations in presentations
- Plugin Marketplace
- Live viewer
- Ligatures
- OLE spreadsheets
- New interface themes

- Recipient roles in forms
- SmartArt
- Extended password protection
- Unicode and LaTeX equations
- Paste link for spreadsheets
- Watch Window
- Paste Special for slides
- Guides and gridlines in presentations
- Other improvements in usability and functionality

What's new in ONLYOFFICE Docs v7.3
SmartArt

Insert **SmartArt** elements to create a visual representation of your ideas.
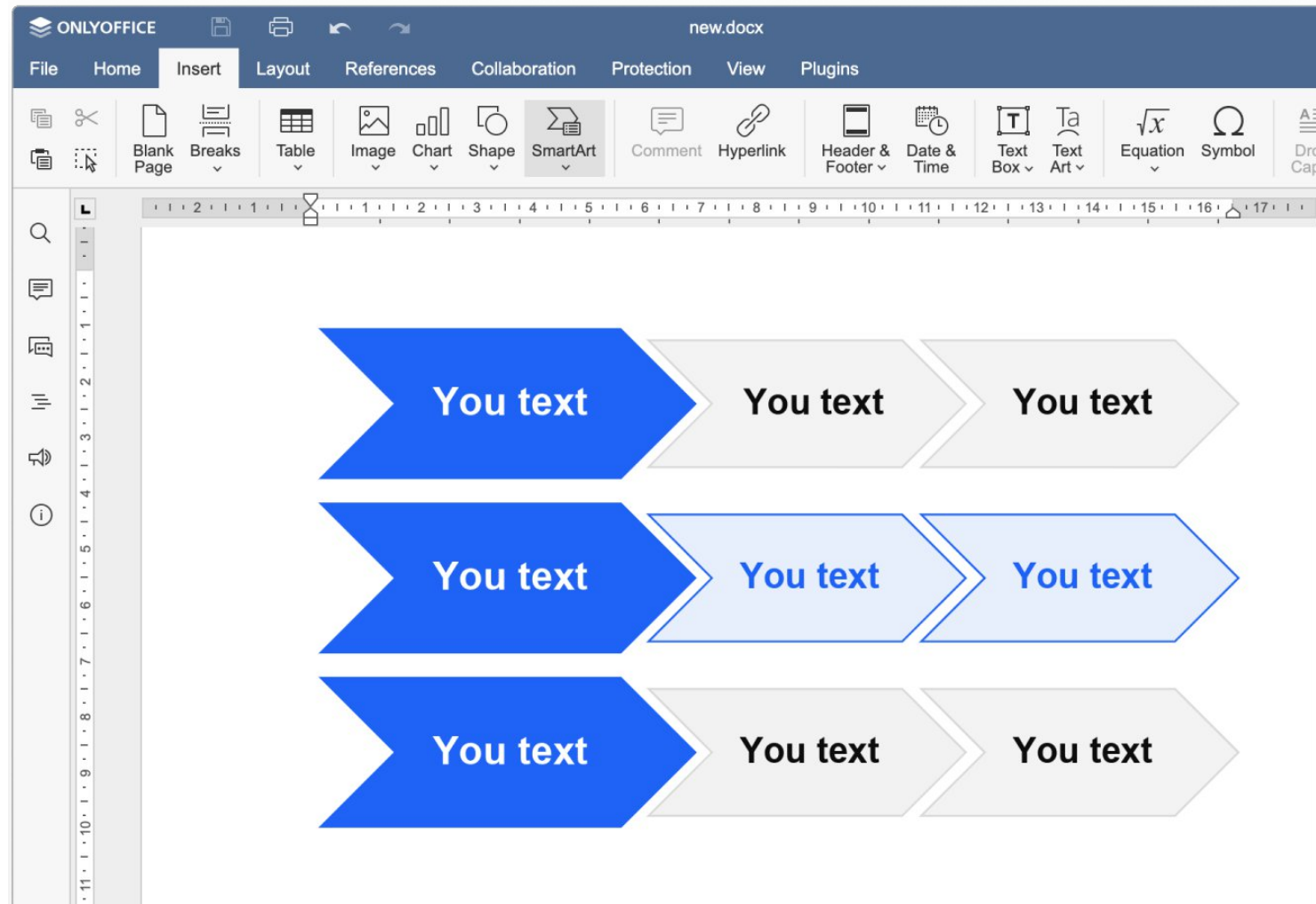
Extended password protection

Set passwords + allow only certain actions:

- reading
- filling forms
- commenting
- tracking changes

Protect

Password (optional)

[   ] 👁

Repeat password

[   ]

Allow only this type of editing in the document

- ⦿ No changes (Read only)
- ◯ Filling forms
- ◯ Tracked changes
- ◯ Comments

Warning: If you lose or forget the password, it cannot be recovered. Please keep it in a safe place.

Protect   **Cancel**

What's new in ONLYOFFICE Docs v7.3
Unicode and LaTex equations

Create math equations using
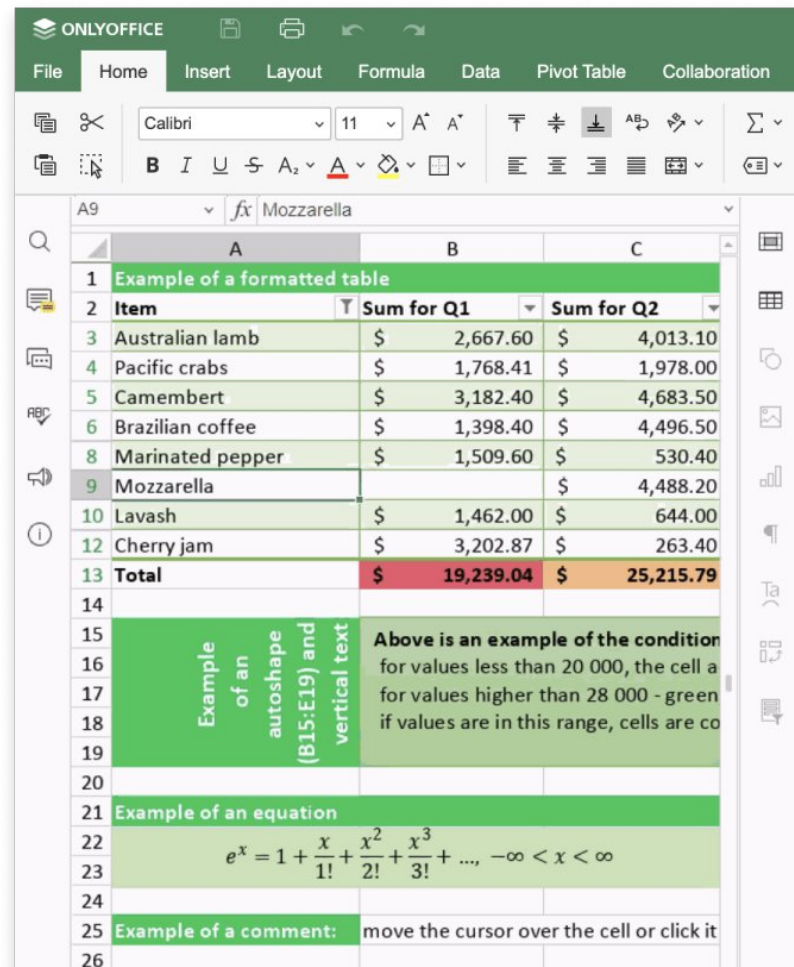the **Unicode** and **LaTeX syntax**.
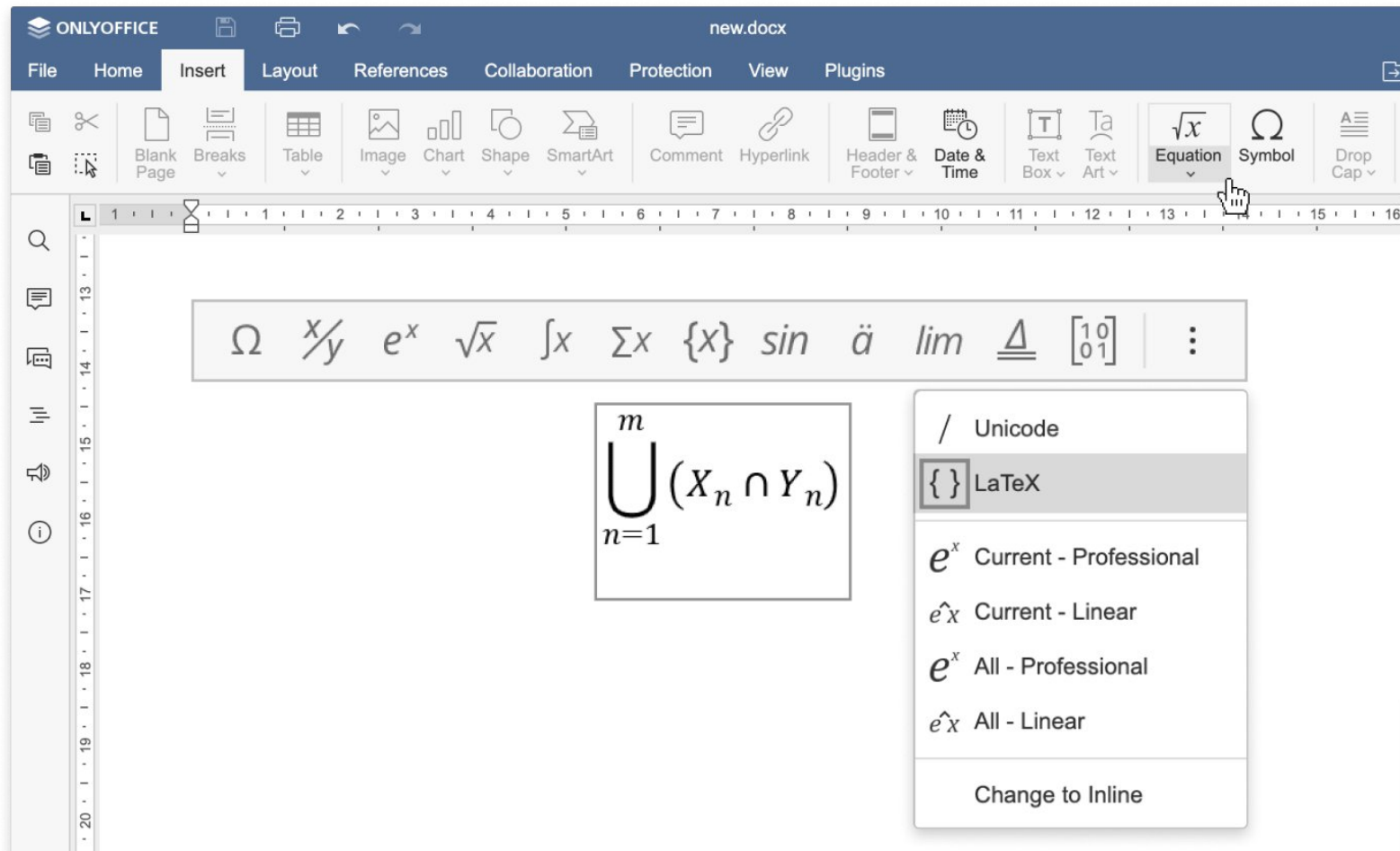
What's new in ONLYOFFICE Docs v7.3
Paste link for spreadsheets

Add links between several spreadsheets using copy-paste.
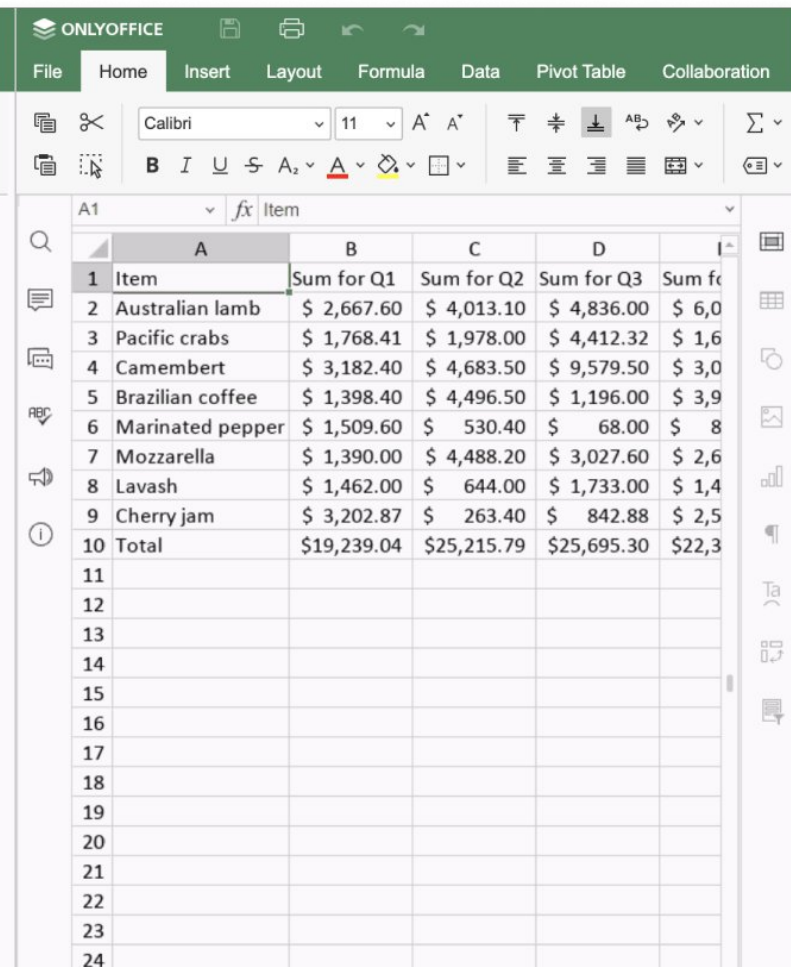
*Available for users of ONLYOFFICE Workspace.

What's new in ONLYOFFICE Docs v7.3
Watch Window

Conveniently audit formula
calculations in large files.

Watch window   ✕

Add watch	Delete watch ⌄

Book	Sheet	Name	Cell	Value	Formula
EN Sampl...	PLAN		C26	$ 3,261.00	=AVERAGE(C19:C23)
EN Sampl...	PLAN		D25	18%	=IFERROR(D19/D22-1,"")
EN Sampl...	PLAN	Income	O26	$ 29,294.90	=SUM(Other_income)
EN Sampl...	PLAN		F44	$ 29,294.90	=MAX(C26:P26)

Close

New formulas

- TEXTBEFORE
- TEXTAFTER
- TEXTSPLIT
- VSTACK
- HSTACK
- TOROW
- TOCOL

- WRAPROWS
- WRAPCOLS
- TAKE
- DROP
- CHOOSEROWS
- CHOOSECOLS
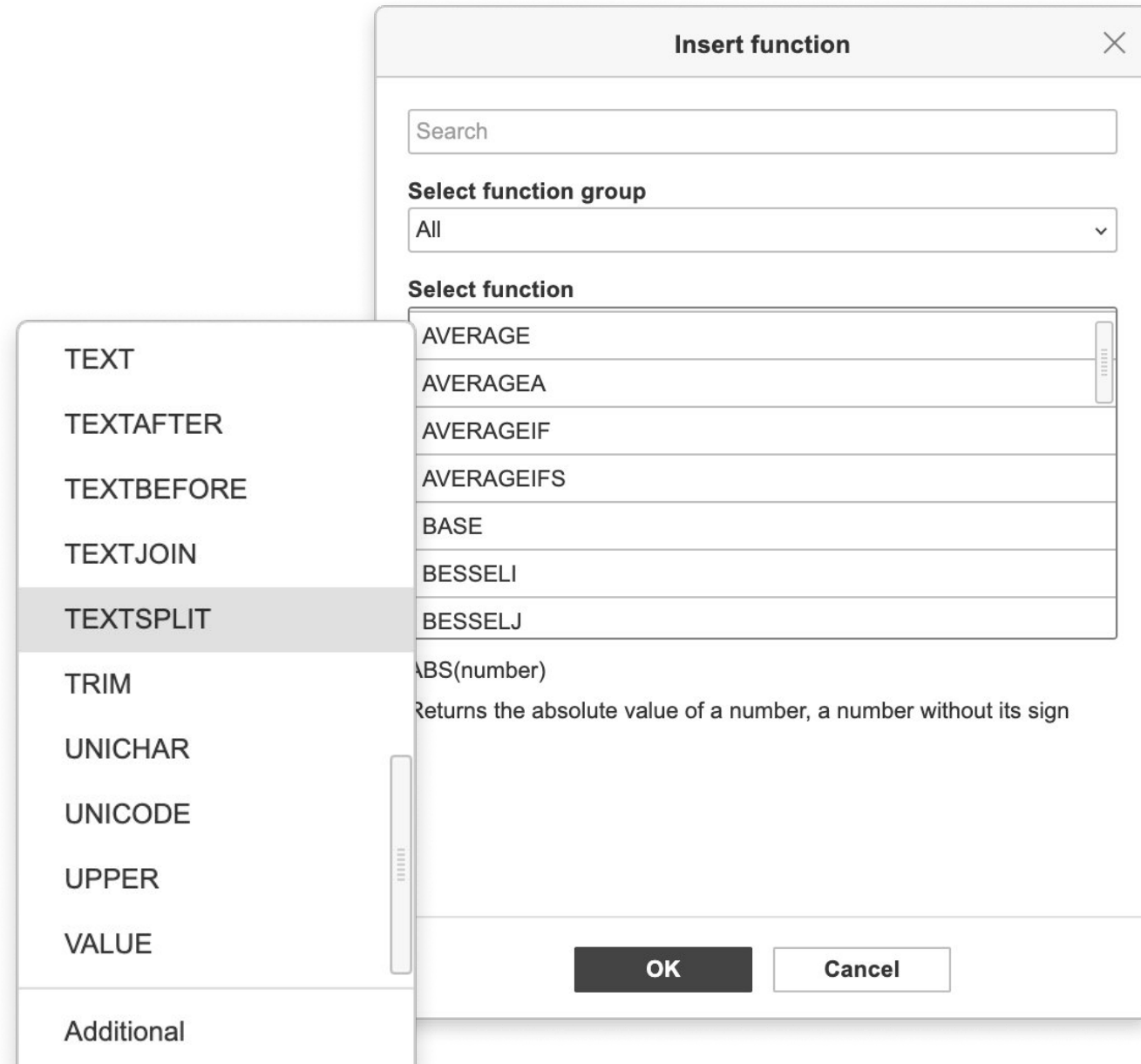
What's new in ONLYOFFICE Docs v7.3
Presentation Editor

Use Paste Special to insert slides:

- Use destination theme

- Keep source formatting

- Picture

What's new in ONLYOFFICE Docs v7.3
Presentation Editor

- **Guides and gridlines** settings available in the View tab and slide context menu
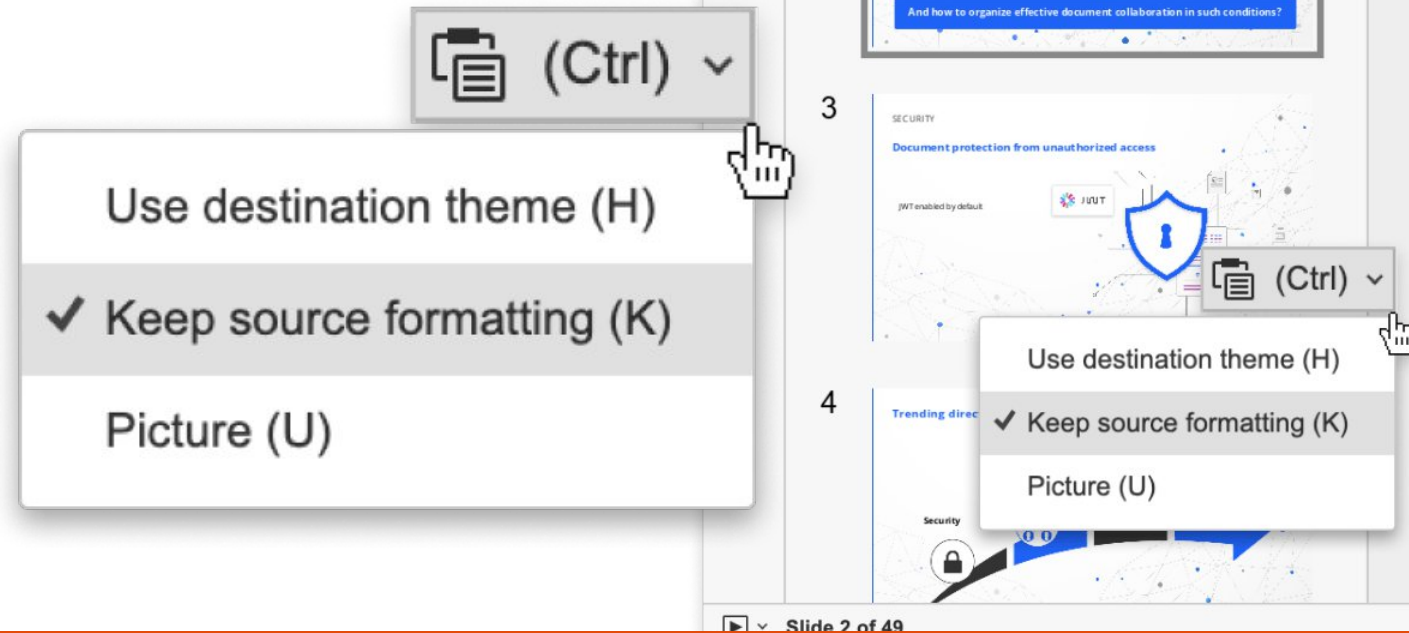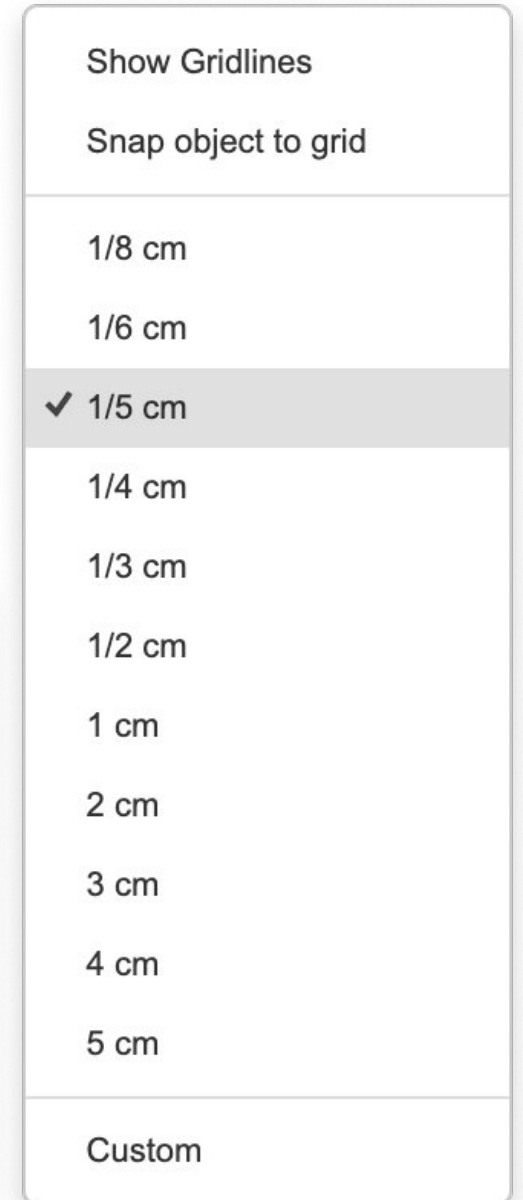
- **Smart Guides**

| Show Gridlines |
| Snap object to grid |

| 1/8 cm |
| 1/6 cm |
| ✔ 1/5 cm |
| 1/4 cm |
| 1/3 cm |
| 1/2 cm |
| 1 cm |
| 2 cm |
| 3 cm |
| 4 cm |
| 5 cm |
| Custom |

| Show guides |
| Add vertical guide |
| Add horizontal guide |
| ✔ Smart guides |
| Clear guides |
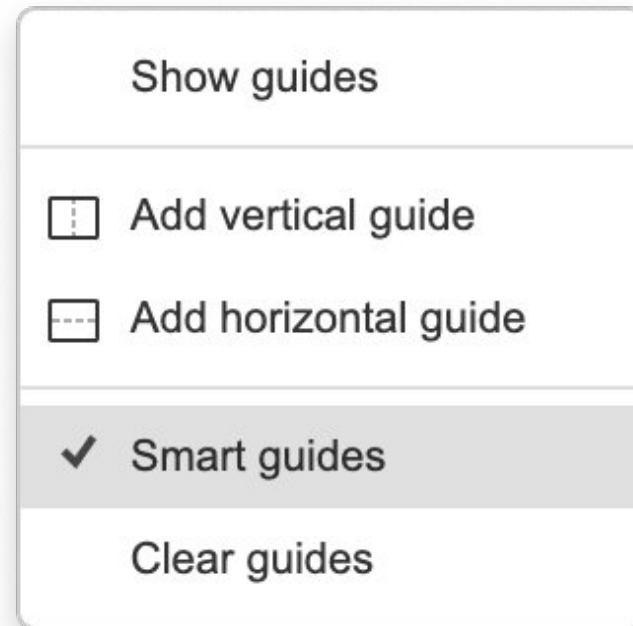
ONLYOFFICE Docs

Available as **DEB, RPM, Docker, Snap, UCS, Cloudron, AMI, Kubernetes**

+ ONLYOFFICE Docs SaaS

Test ONLYOFFICE Docs

ONLYOFFICE

Roadmap

What's next

✔ Forms: Encryption, including encrypted parts of a document (basically, for field data);

✔ Forms: E-signatures (signing both the entire document with all fields as well as only the certain field group);

✔ PDF editor;

✔ RTL support;

✔ New functionality in React, Vue, and Angular components;

✔ Test integration samples for C# .Net, Core, GoLang;

![ONLYOFFICE]

Roadmap

What's next

- ✔ New integrations: Odoo, Discource, Trello, Pipedrive, SuiteCRM;

- ✔ Integrations in research: Zoom, Monday.com, Confluence Cloud;

- ✔ New connector versions in testing: HumHub, Nuxeo, Plone, Moodle, Nextcloud, ownCloud;

- ✔ New features in integration: form creation tools, paste via link in spreadsheets, demo server integration, new security controls, and mentions in comments;

- ✔ ONLYOFFICE DocSpace + integrations.

ONLYOFFICE

Thank you!

Questions & info

Contacts:

sales@onlyoffice.com
partners@onlyoffice.com

onlyoffice.com