

## 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









CBG Max Planck Institute of Molecular Cell Biology and Genetics Ministerium für Innovation, Wissenschaft und Forschung des Landes Nordrhein-Westfalen









# About ONLYOFFICE project

#### Products

ONLYOFFICE Docs ONLYOFFICE Workspace

#### **Solutions for**

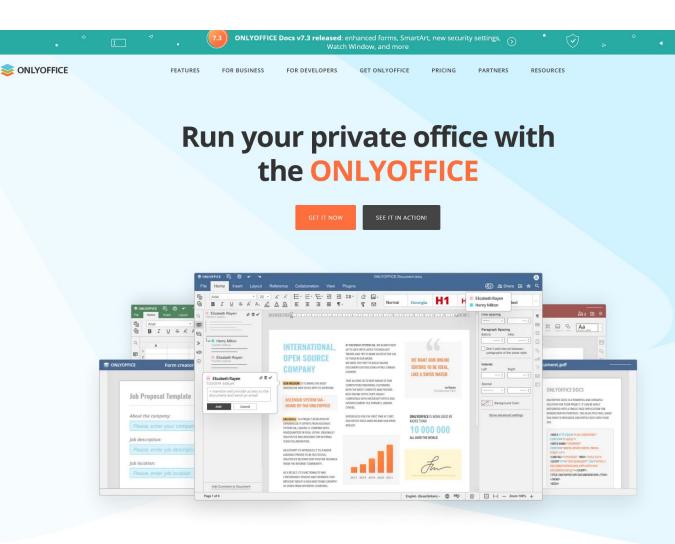
SaaS, On-premises, Desktop, Mobile

#### **Supported platforms**

Windows, Linux, macOS, Android, iOS

#### License

Open source / commercial

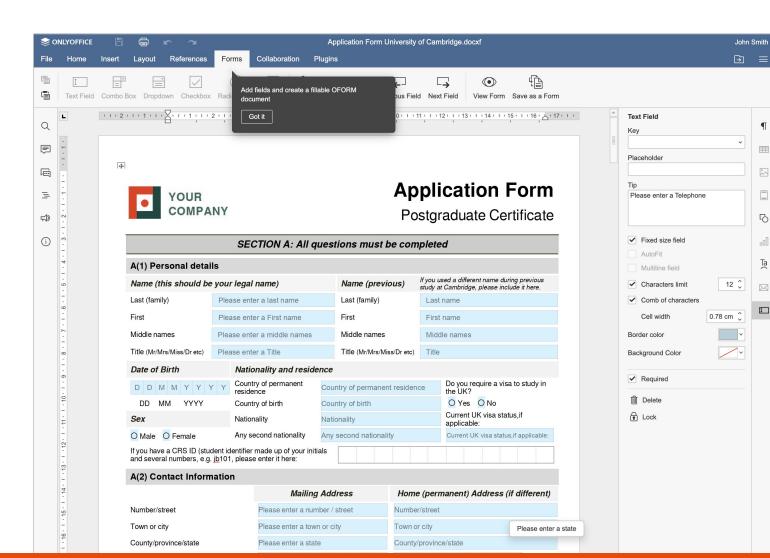




Welcome to ONLYOFFICE software for secure editing & collaboration Watch our video

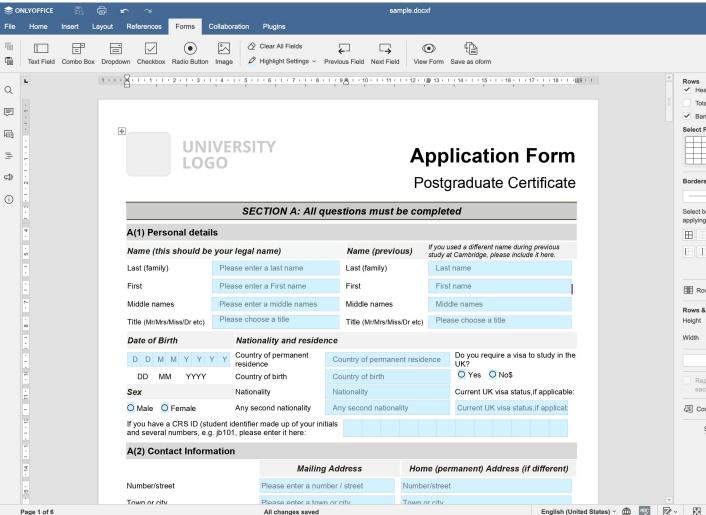
## What are OFORMs?

- 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.)



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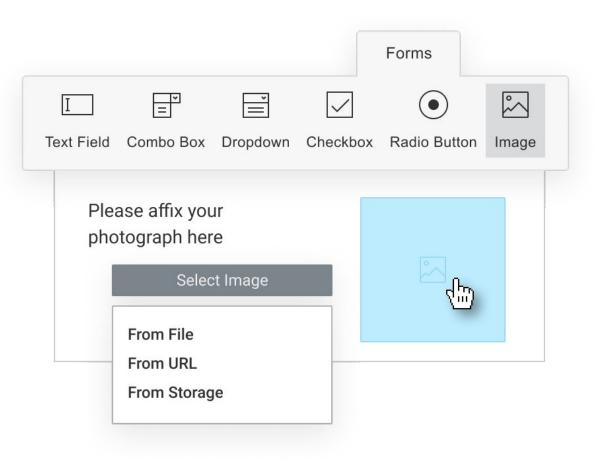
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- Image
- Email address

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- Email address
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- Complex field

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Display the date like this

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

NEW Date & Time

ZIP code

	Arbitrary Mask	~
	99999-9999	~
Phone	Number (e.g. (123) 456-7890)	

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)

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

NEW Date & Time

- ZIP code
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## Format Arbitrary Mask $\sim$ 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)

## 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

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#### Form building and configuration



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

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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
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Close	
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#### 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.

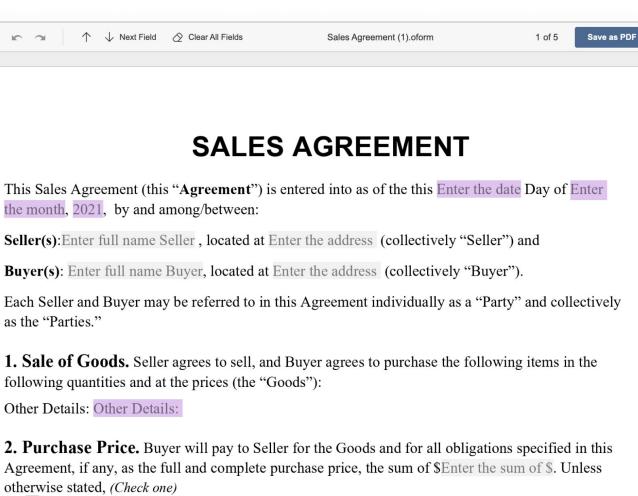
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#### Form building and configuration

User roles NEW

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

#### Where to find: OFORM files



- O Seller
- O 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

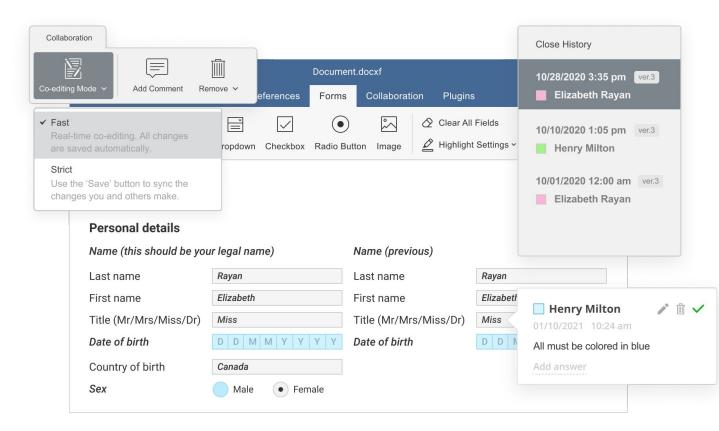
#### SALES AGREEMENT

This Sales Agreement (this "Agreement") is entered into as of the <u>this 29 Day of December</u>, 2022, by and among/between:

Seller(s): John-Ja	mes Parra , located Choose an iten	➡ pllectively "Seller") and
Buyer(s): Darci "Buyer").	Choose an item 11 Vine Dr. Bettendorf, IA 52722	llingford, CT 06492 (collectively
Each Seller and as the "Parties."	15 West Manor Ave. Ephrata, PA 17522 84 Campfire Ave. Rolla, MO 65401	t individually as a "Party" and collectively
<b>1. Sale of Go</b> following quant Other Details: C	9227 S. St Paul Ave. Wallingford, CT 06492 756 S. Amherst Ave. Jamaica, NY 11432 9015 N. Military St. Faribault, MN 55021	s to purchase the following items in the
Outer Details.	18 Talbot Ave. Somerset, NJ 08873	

### Collaboration in forms **Real-time co-editing and collaboration**

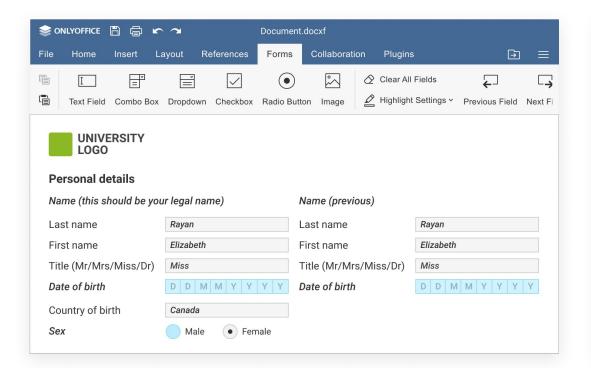
- Two co-editing modes
- Commenting & mentions
- Reviewing & version history
- Chat, Telegram, Zoom, Rainbow & Jitsi



## Collaboration in forms Sharing and filling internally and externally

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Heather Butler	Form Filling 🔻 🛞
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	Deny Access

## **OOXML-compatible formats: DOCXF and OFORM**



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First name	Elizabeth	First name	Elizabeth
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Sex	Male • Female		
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	Mailing address	Hom	ne (permanent) Address
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## Export to PDF, DOCX, and more for working in external apps

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# 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

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## **OFORMs for document automation:** scenarios by environment

#### Within organization

- Integration via connectors
- ONLYOFFICE Workspace

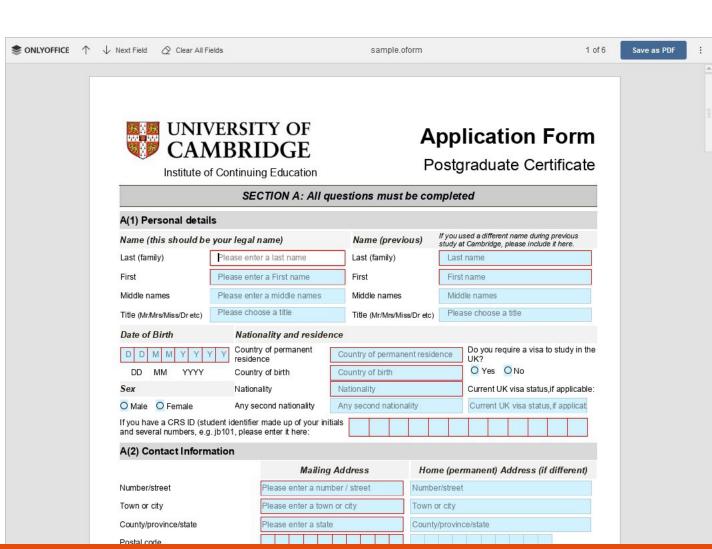
#### Applications and websites

**ONLYOFFICE Docs API** 

ONLYOFFICE DocSpace

Front desk

Coming soon



## **Document automation in your organization**

**ONLYOFFICE Workspace** NEW Third-party DMS, CMS, and LMS: Liferay Thoodle flexible project management  $\mathbf{O}$ 🝌 Chamilo **⊘** Drupal<sup>™</sup> **NUXEO Nextcloud** 📹 strapi S > SharePoint HumHub Jira Software Alfresco **WORDPRESS Sea**file<sup>®</sup> **Confluence** 

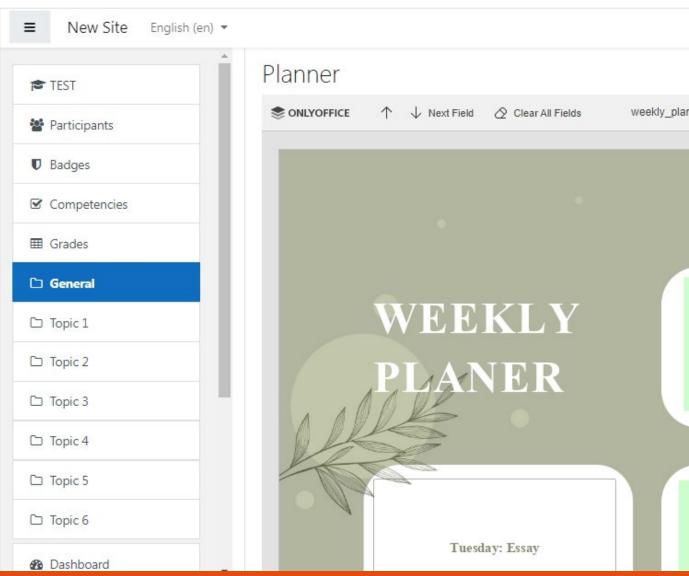
## **OFORMs integration example: ownCloud**

- Form editing and collaboration
- Advanced document permissions
- Federated cloud sharing
- Interface customization
- ownCloud Online and ownCloud Infinite Scale support

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()	9/20/2022 5:43 AM ver.2 Michael Davis	
		We are proud to present the first HTML5 Canvas-based online document editors.
	7/11/2022 3:39 AM ver.1 Michael Davis	ONLYOFFICE Online Editors can be easily integrated into your website or cloud application via API provided. Thus you get a chance to provide users with the most advanced online document editors for text docs, spreadsheets and presentations.
		Why ONLYOFFICE beats all the existing online processors?
		<ul> <li>✓ In the eye of users: it combines the formatting quality of MS Office &amp; online collaboration Google Docs (real-time co-editing and commenting).</li> <li>✓ In the eye of tech enthusiasts: it's built with the use of HTML5 element, Canvas.</li> </ul>
		Click here to see the video comparison with Google and Office 365 document editors.
		ONLYOFFICE Online Editors enable you to:
		<ul> <li>View &amp; Edit documents directly in browser</li> </ul>
		Share files with friends and colleagues
		Co-edit and comment them in real time
		Embed documents to websites and apps
		Work with all the popular file types without formatting loss.
		Sample Chart
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## **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



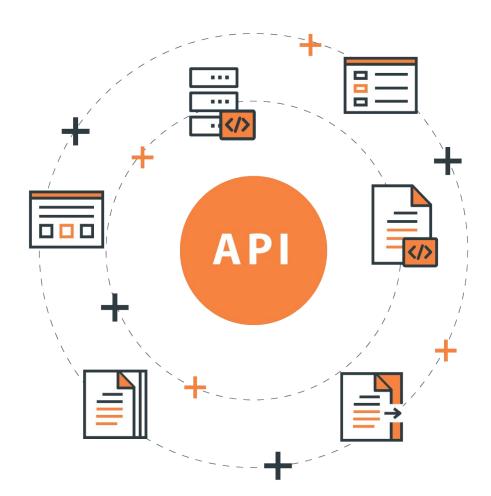
## **Document automation in applications and websites**

**Example: ONLYOFFICE form library** 

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Customer success	OPEN	OPEN	OPEN	
Tax form templates	DOWNLOAD AS	DOWNLOAD AS	DOWNLOAD AS	

# **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

Last Name	Robinson	Date Of Birth	14121987
First Name	Isabella	Sex	O Male O Female
Middle Name	Pierre	Phone	(972)234-8261
Title	Miss	Email	Isabella.Robinson@email.com
Number/street	625 Hartin Cir	City	Irving
Postal Code	75061	Country	U.S.A.
Date Of Completio	n		

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Last (family) name	Robinson	Date of Birth		7

# 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**

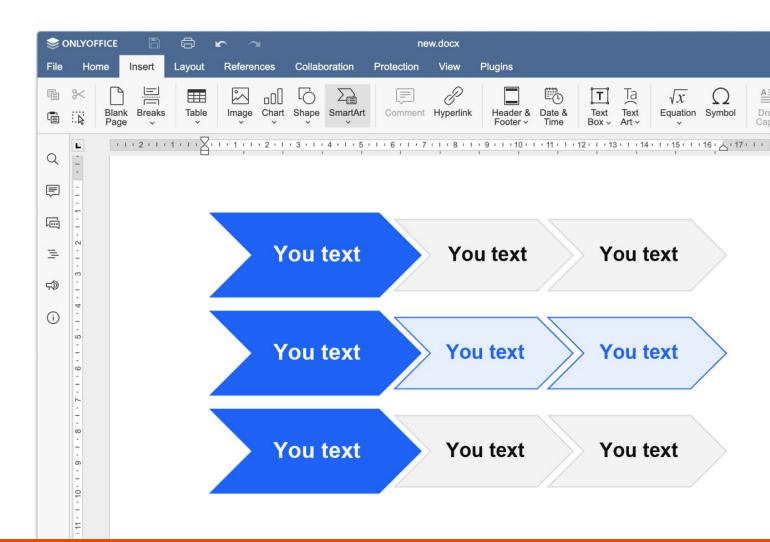
#### 4 major releases (versions 7.0, 7.1, 7.2, 7.3) + 5 intermediate hotfixes

- 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.



## What's new in ONLYOFFICE Docs v7.3 **Extended password protection**

#### Set passwords + allow only certain actions:

- reading
- filling forms
- commenting
- tracking changes

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Password (optional)	
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Repeat password	
Allow only this type of editing in the document	
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<ul> <li>Filling forms</li> </ul>	
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## What's new in ONLYOFFICE Docs v7.3 **Unicode and LaTex equations**

Create math equations using the **Unicode** and **LaTeX syntax**.

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### 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.

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	2 Item T	Sum for Q1 🔹	Sum for Q2 🗸			2	Australian lamb	\$ 2,667.60	\$ 4,013.10		\$ 6,0	B
	3 Australian lamb	\$ 2,667.60	\$ 4,013.10			3	Pacific crabs	\$ 1,768.41	\$ 1,978.00		\$ 1,6	
1	4 Pacific crabs	\$ 1,768.41	\$ 1,978.00	6		4	Camembert	\$ 3,182.40	\$ 4,683.50	\$ 9,579.50	\$ 3,0	9
	5 Camembert	\$ 3,182.40	\$ 4,683.50		000	5	Brazilian coffee	\$ 1,398.40	\$ 4,496.50	\$ 1,196.00	\$ 3,9	
	6 Brazilian coffee	\$ 1,398.40	\$ 4,496.50		ABC	6	Marinated pepper	\$ 1,509.60	\$ 530.40	\$ 68.00	\$ 8	2
	8 Marinated pepper	\$ 1,509.60	\$ 530.40			7	Mozzarella	\$ 1,390.00	\$ 4,488.20	\$ 3,027.60	\$ 2,6	
⊅	9 Mozzarella		\$ 4,488.20	l	T)	8	Lavash	\$ 1,462.00	\$ 644.00	\$ 1,733.00	\$ 1,4	D
	10 Lavash	\$ 1,462.00	\$ 644.00		0	9	Cherry jam	\$ 3,202.87	\$ 263.40	\$ 842.88	\$ 2,5	Ι.
	12 Cherry jam	\$ 3,202.87	\$ 263.40	9		10	Total	\$19,239.04	\$25,215.79	\$25,695.30	\$22,3	
	13 Total	\$ 19,239.04	\$ 25,215.79	Та		11						
	14			~		12						
	15 a e E X Above is an example of t		ole of the condition	of the condition		13						i
	10 12 12 19 12 19 12 19 12 12 12 12 12 12 12 12 12 12 12 12 12	for values less that	n 20 000, the cell a	ЦęЛ		14						1
			han 28 000 - green	40004		15					· · · · ·	1
	Ver E 15:	if values are in this	s range, cells are co	, <b>L</b> T		16						
						17				-		
	20					18					-	
	21 Example of an equation	2 2				19						
	$e^x = 1 + \frac{x}{x} + \frac{x}{x}$	$\frac{x^2}{2!} + \frac{x^3}{3!} + \dots, -\infty <$	$x < \infty$			20						
	23 1:	2! 3!				21					_	
	24					22						
	25 Example of a comment:	move the cursor ove	er the cell or click it			23						
	26					24						

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

Conveniently audit formula calculations in large files.

Add wa	atch	Delete watch	Y		
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)

## What's new in ONLYOFFICE Docs v7.3 **New formulas**

TEXTBEFORE
------------

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

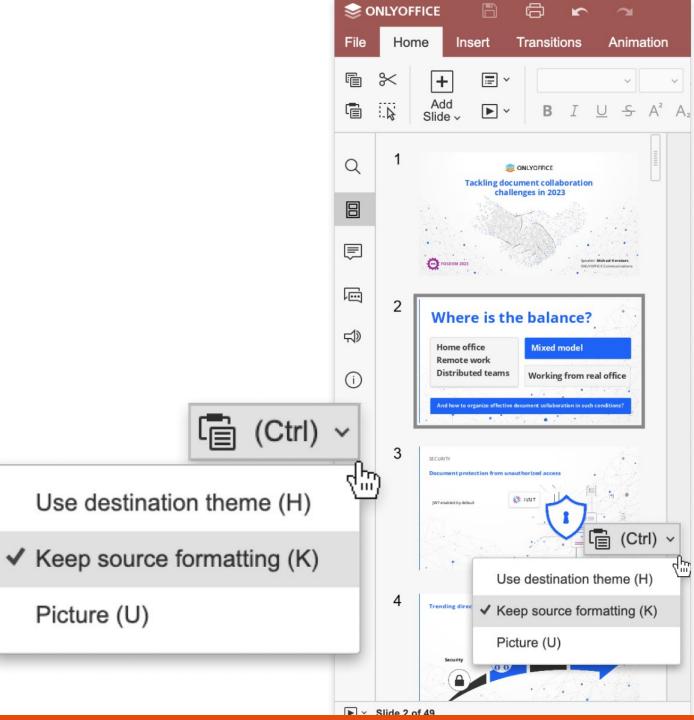
- WRAPROWS
  - WRAPCOLS
  - TAKE
  - DROP
  - CHOOSEROWS
  - CHOOSECOLS

	Insert function $\times$
	Search
	Select function group
	All v
	Select function
TEXT	AVERAGE
IEAI	AVERAGEA
TEXTAFTER	AVERAGEIF
TEXTBEFORE	AVERAGEIFS
TEXTJOIN	BASE
TEXTJOIN	BESSELI
TEXTSPLIT	BESSELJ
TRIM	ABS(number) Returns the absolute value of a number, a number without its sign
UNICHAR	
UNICODE	
UPPER	
VALUE	OK Cancel
Additional	

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

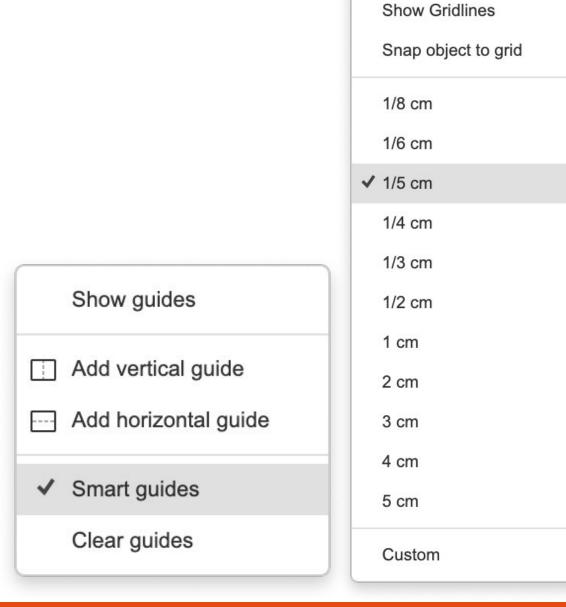
#### Use Paste Special to insert slides:

- Use destination theme
- Keep source formatting
- Picture



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

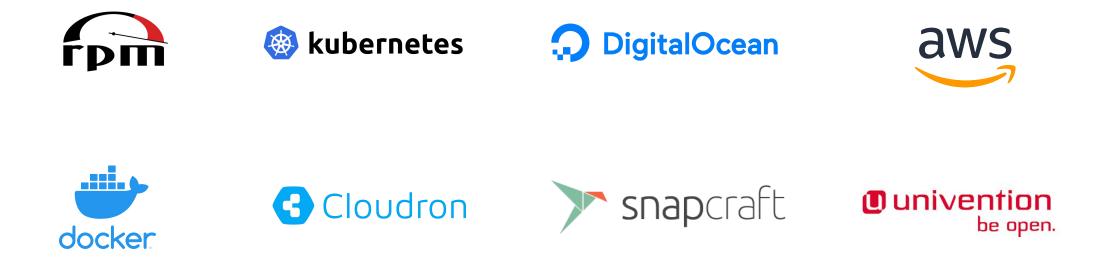
- Guides and gridlines settings available in the View tab and slide context menu
- Smart Guides



#### **ONLYOFFICE Docs**

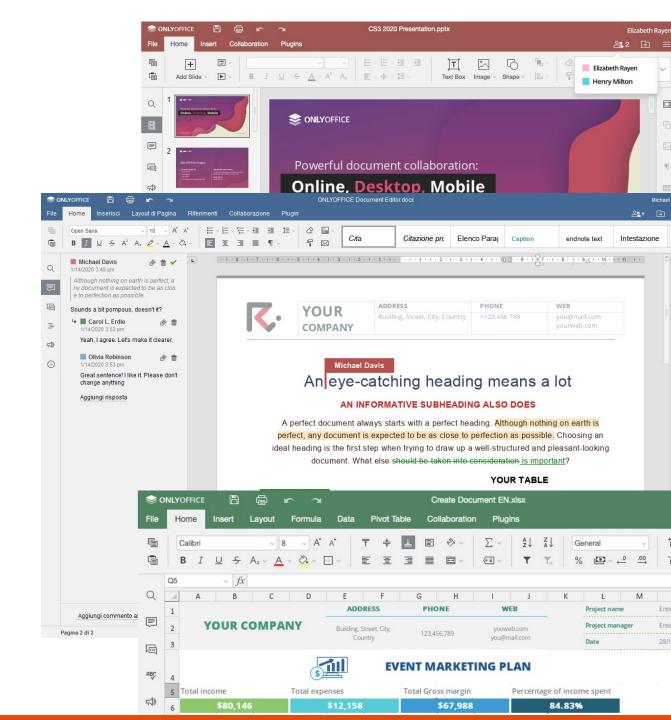
#### Available as DEB, RPM, Docker, Snap, UCS, Cloudron, AMI, Kubernetes

+ ONLYOFFICE Docs SaaS



### **Test ONLYOFFICE Docs**





#### 

## 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;

- ATL support;
- New functionality in React, Vue, and Angular components;

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



## 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.



# **Thank you!**

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#### **Questions & info**

