

# Office software for banking industry:

## How to choose a suitable solution addressing the today's challenges

Speaker: **Petar Zivanov**



# Office software challenges for the banking industry



The need for multiple apps to work with different file types

# Office software challenges for the banking industry

1

The need for multiple apps to work with different file types

2

Data security & regulatory compliance

# Office software challenges for the banking industry

-  The need for multiple apps to work with different file types
-  Data security & regulatory compliance
-  Integration into the existing environment

# Office software challenges for the banking industry

1

The need for multiple apps to work with different file types

2

Data security & regulatory compliance

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Integration into the existing environment

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Adopting up-to-date technologies (AI)

# Office software challenges for the banking industry

1

The need for multiple apps to work with different file types

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Data security & regulatory compliance

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Integration into the existing environment

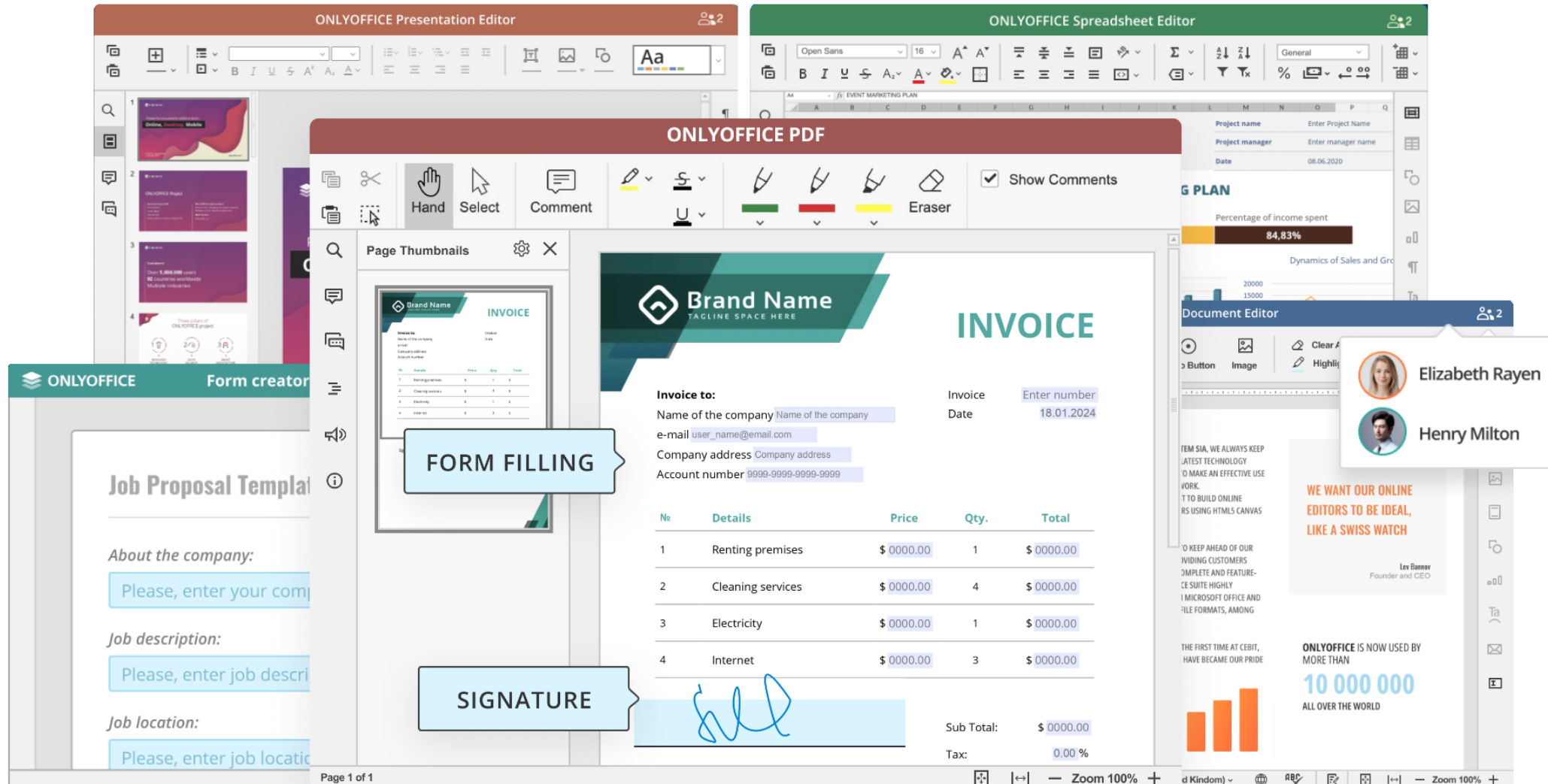
4

Adopting up-to-date technologies (AI)

5

Increasing costs

# Best-in-breed online editors for banking industry



The image displays a central invoice document with several ONLYOFFICE application windows overlaid on it. The invoice is for 'Brand Name' and lists items like 'Renting premises', 'Cleaning services', 'Electricity', and 'Internet'. A signature is visible at the bottom. The overlaid windows include:

- ONLYOFFICE Presentation Editor:** Shows a slide with a purple and red design.
- ONLYOFFICE Spreadsheet Editor:** Shows a spreadsheet with columns A-P and rows 1-4. A bar chart shows 'Percentage of income spent' at 84.83%.
- ONLYOFFICE PDF:** Shows a toolbar with 'Hand', 'Select', 'Comment', and 'Eraser' tools. A 'Page Thumbnails' sidebar is visible on the left.
- ONLYOFFICE Form creator:** Shows a 'Job Proposal Template' form with fields for 'About the company', 'Job description', and 'Job location'.
- Document Editor:** Shows a document with a signature block for 'Elizabeth Rayen' and 'Henry Milton'.

Two callout boxes highlight specific features on the invoice: 'FORM FILLING' points to the input fields, and 'SIGNATURE' points to the handwritten signature area.

Trusted by more than  
**10 000 000** users worldwide





# Why ONLYOFFICE Docs



**Expert-level  
functionality**



**Data security  
and control**



**AI assistant**



**Deep integration into  
your infrastructure**



**Beneficial terms**

# Expert-level functionality

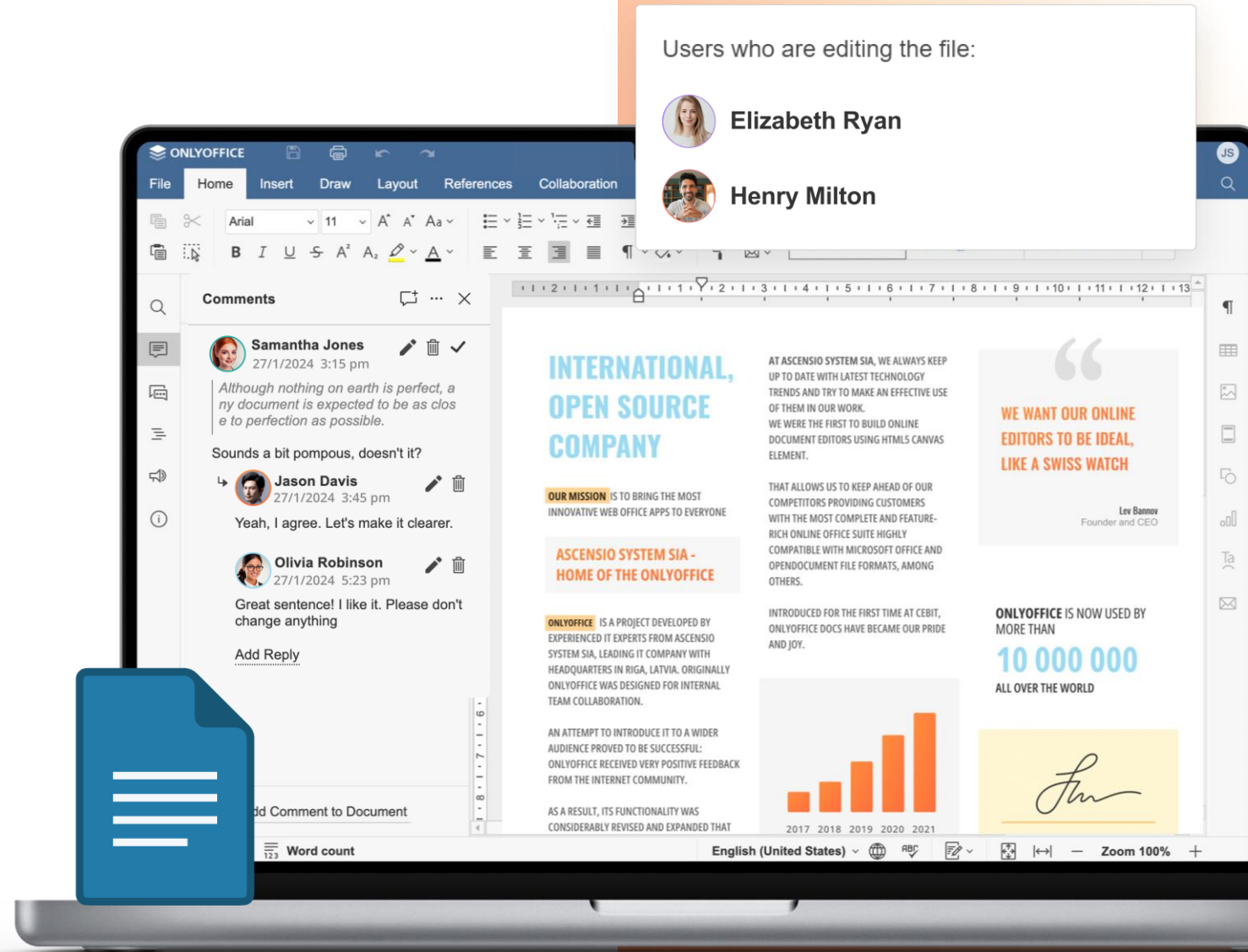
## Work with all kinds of documents:

- ✓ contracts
- ✓ applications
- ✓ statements
- ✓ reports
- ✓ worksheets
- ✓ bid bond forms
- ✓ bills
- ✓ invoices
- etc.



# Expert-level functionality

**Text documents:** all editing operations with fonts, styles, text formatting, shapes, graphics, tables of contents



The screenshot displays the ONLYOFFICE web interface. On the left, a 'Comments' sidebar shows three comments:

- Samantha Jones** (27/1/2024 3:15 pm): *Although nothing on earth is perfect, a ny document is expected to be as clos e to perfection as possible.*
- Jason Davis** (27/1/2024 3:45 pm): Sounds a bit pompous, doesn't it?
- Olivia Robinson** (27/1/2024 5:23 pm): Great sentence! I like it. Please don't change anything

The main document area shows a page with the following content:

- INTERNATIONAL, OPEN SOURCE COMPANY**
- OUR MISSION** IS TO BRING THE MOST INNOVATIVE WEB OFFICE APPS TO EVERYONE
- ASCENSIO SYSTEM SIA - HOME OF THE ONLYOFFICE**
- ONLYOFFICE** IS A PROJECT DEVELOPED BY EXPERIENCED IT EXPERTS FROM ASCENSIO SYSTEM SIA, LEADING IT COMPANY WITH HEADQUARTERS IN RIGA, LATVIA. ORIGINALLY ONLYOFFICE WAS DESIGNED FOR INTERNAL TEAM COLLABORATION.
- AN ATTEMPT TO INTRODUCE IT TO A WIDER AUDIENCE PROVED TO BE SUCCESSFUL: ONLYOFFICE RECEIVED VERY POSITIVE FEEDBACK FROM THE INTERNET COMMUNITY.
- AS A RESULT, ITS FUNCTIONALITY WAS CONSIDERABLY REVISED AND EXPANDED THAT

On the right side of the document, there is a quote: **WE WANT OUR ONLINE EDITORS TO BE IDEAL, LIKE A SWISS WATCH** by **Lev Bamnov**, Founder and CEO. Below this is a statistic: **ONLYOFFICE IS NOW USED BY MORE THAN 10 000 000 ALL OVER THE WORLD**. A bar chart shows data for the years 2017, 2018, 2019, 2020, and 2021, with a signature below it.

At the top right, a collaboration overlay titled 'Users who are editing the file:' lists **Elizabeth Ryan** and **Henry Milton**.

The bottom status bar shows 'Word count', 'English (United States)', and 'Zoom 100%'.

# Expert-level functionality

**Text documents:** all editing operations with fonts, styles, text formatting, shapes, graphics, tables of contents

**Spreadsheets:** 450+ functions and formulas, charts, graphics, table templates, pivot tables, conditional formatting

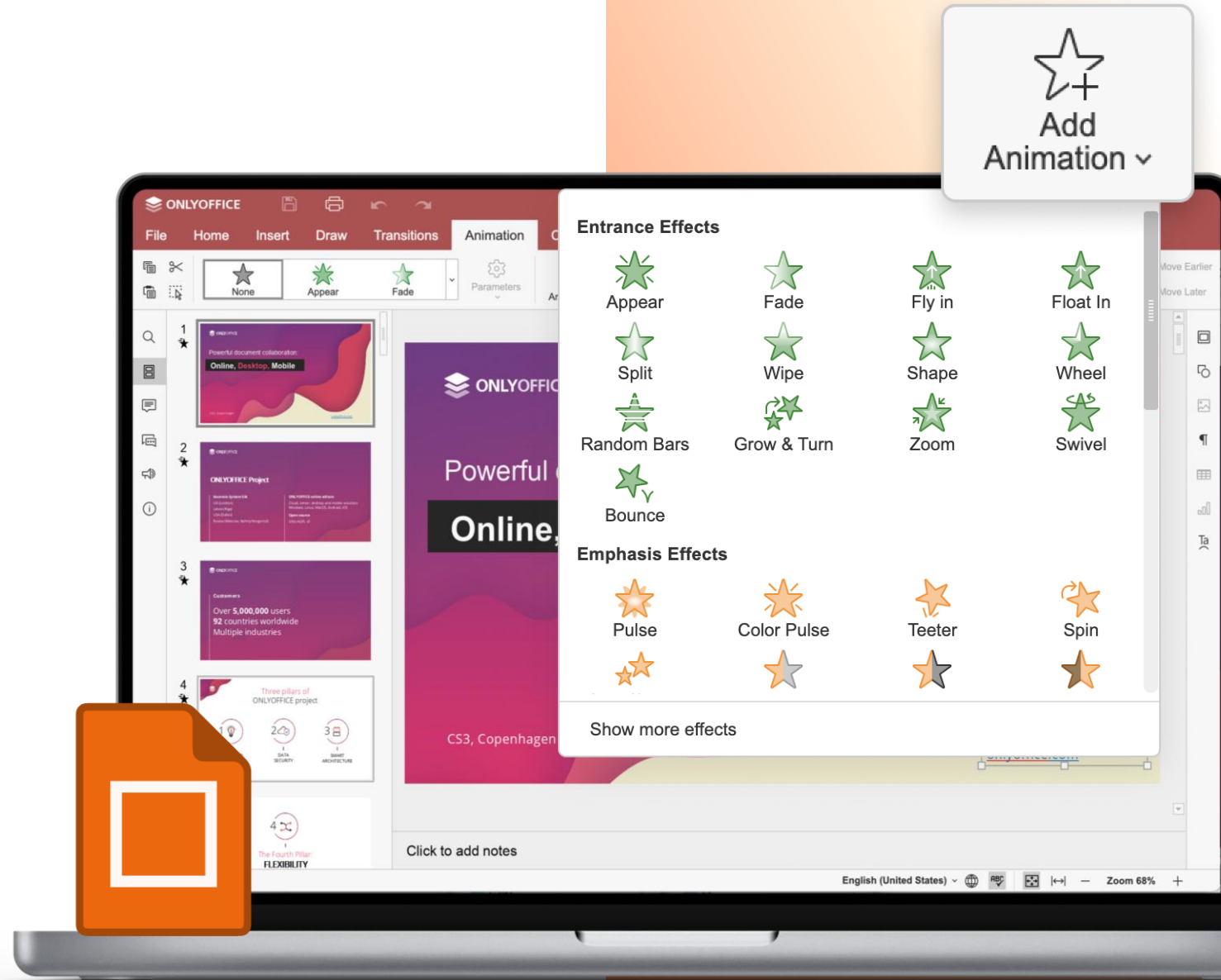


# Expert-level functionality

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**Presentations:** formatting tools, objects, style options, transitions, animations, notes



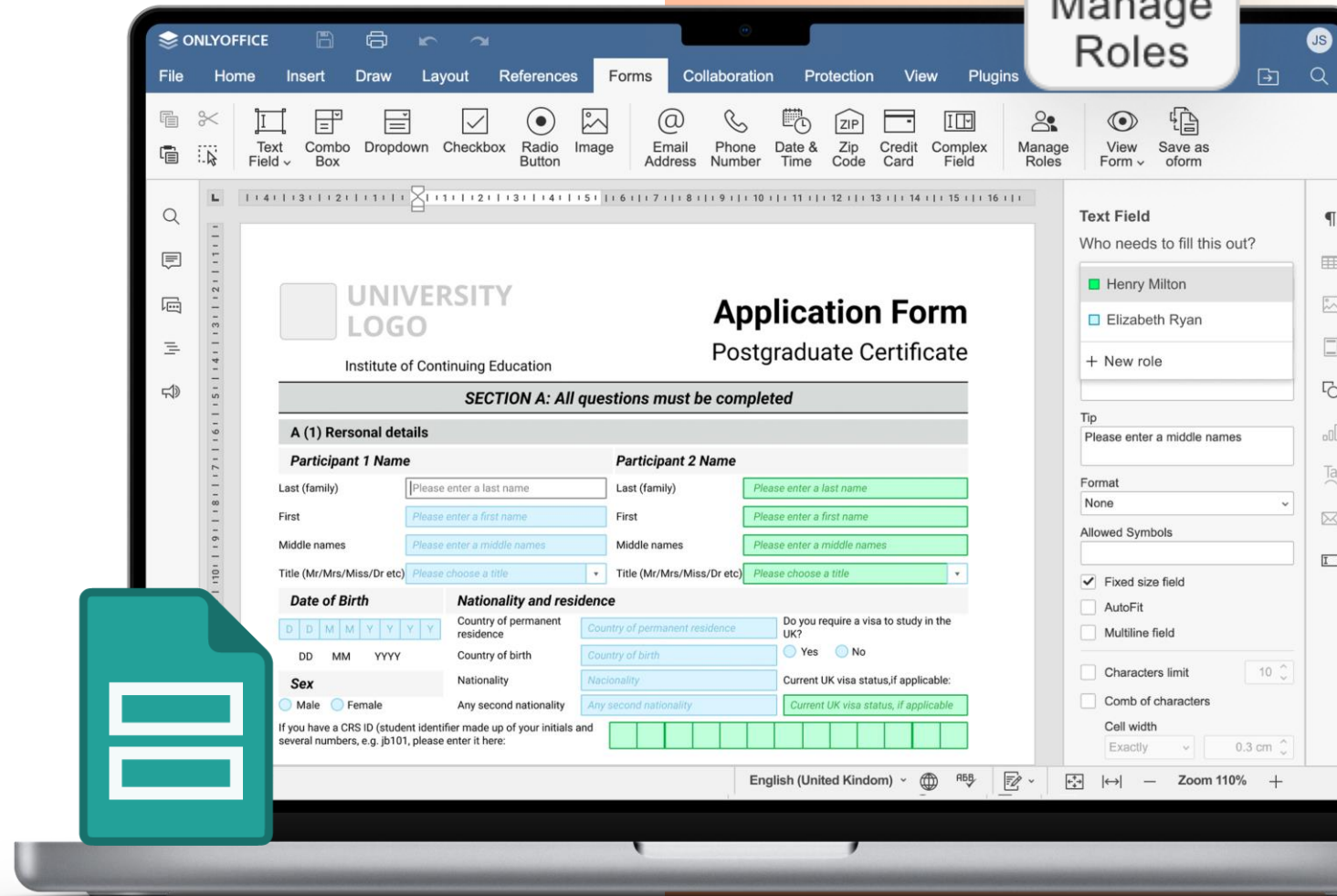
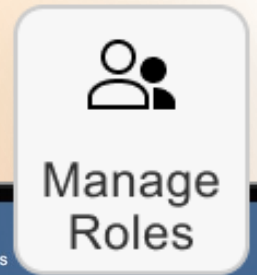
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**Fillable forms:** various field types, flexible settings, recipient roles, export to PDF



# Expert-level functionality



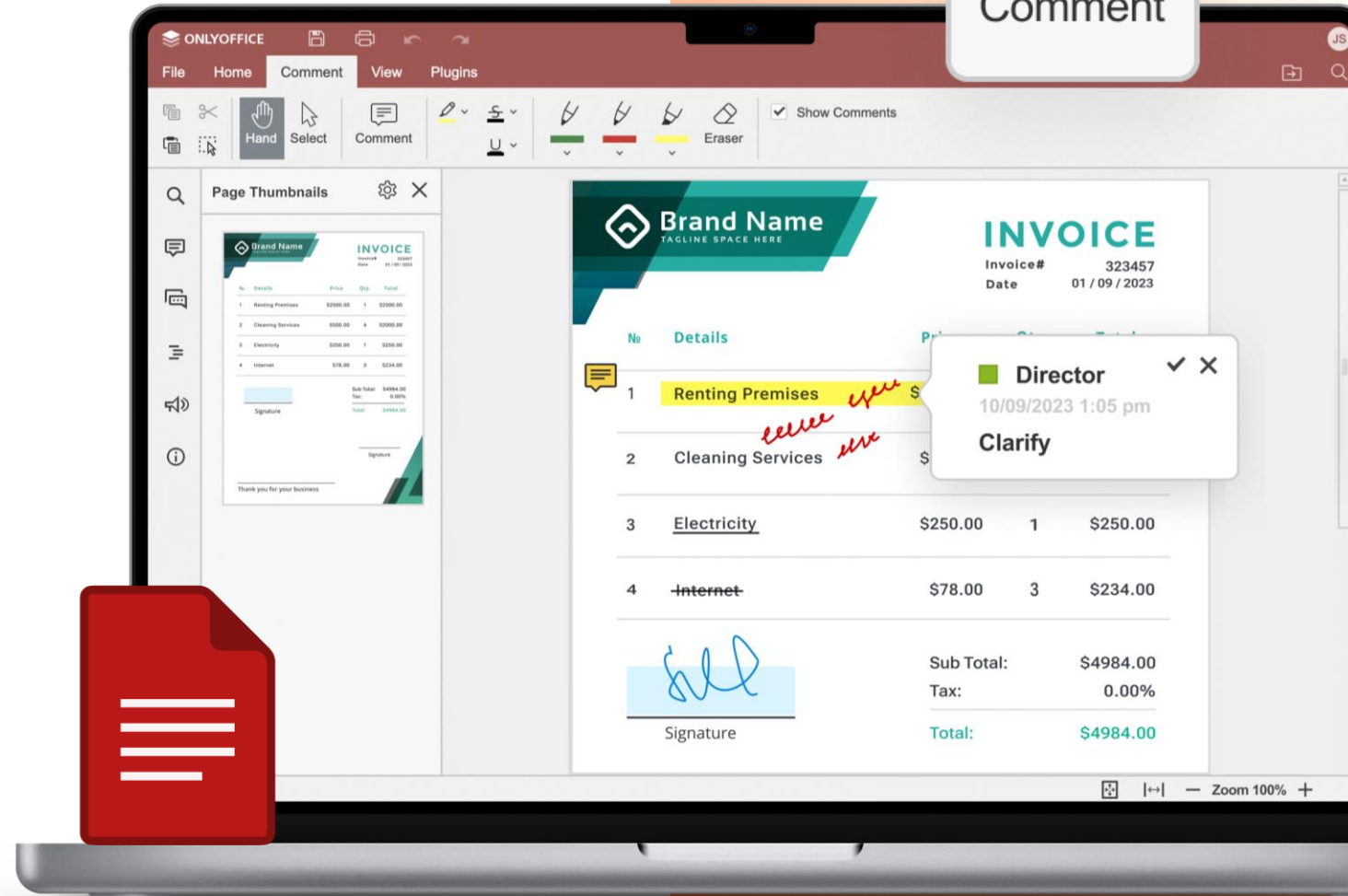
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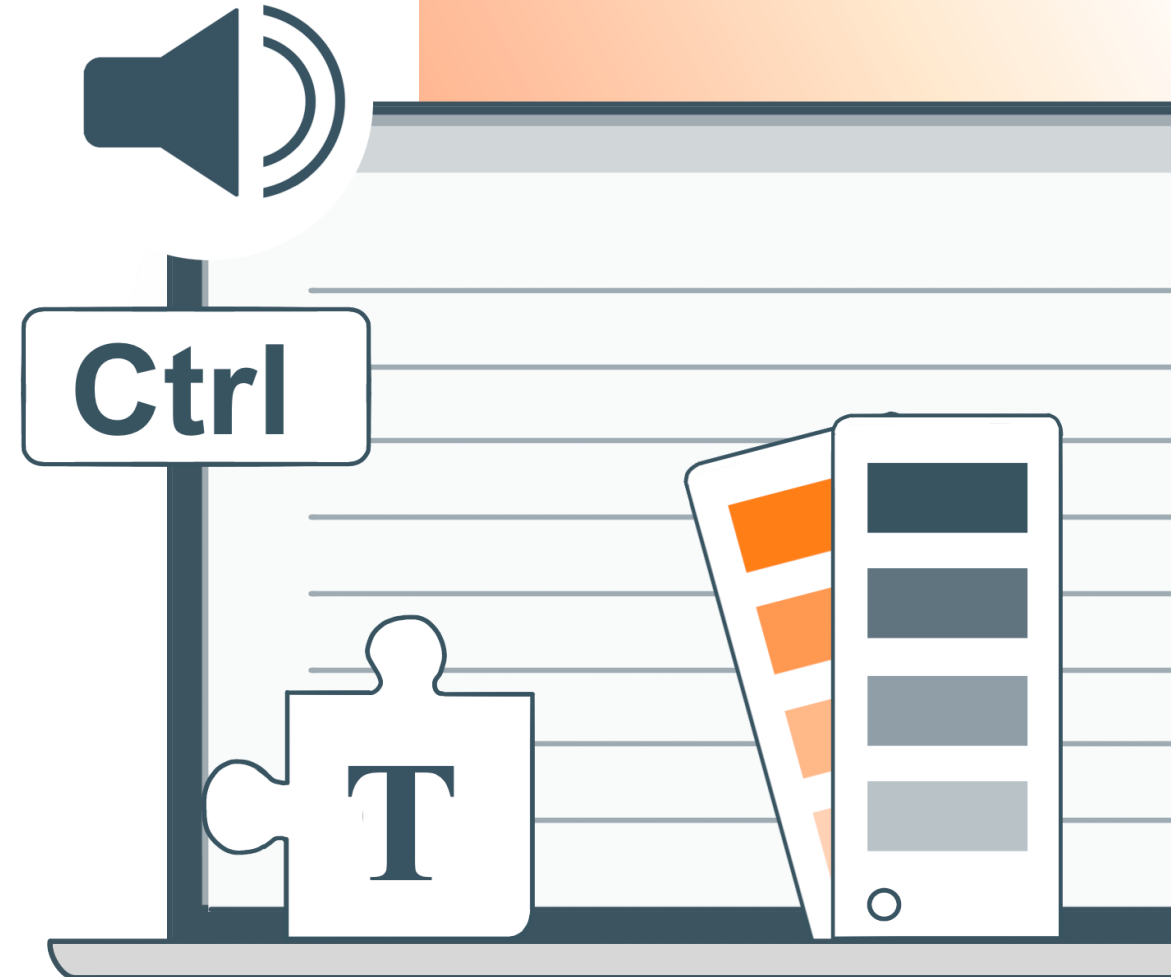
**PDF files:** fillable PDF forms, annotation,



# Expert-level functionality

## Accessibility

- ✓ Screen Readers
- ✓ UI tweaks
- ✓ Various color modes
- ✓ Hotkeys
- ✓ Useful plugins in the editors
  - Text-to-speech
  - Speech input
  - Typograf
  - Translator
  - OCR





# Expert-level functionality

## Maximum compatibility with MS Office files



**Connecting people in new ways**



...this was all you needed to stay in touch and run your small business. No longer. Today, people are more mobile than ever, they use more devices than ever, and they expect instant connectivity no matter where they are. With a little simple technology, you can get a jump on the competition by connecting your employees with each other, your customers, and your partners, in real time, from anywhere.

Microsoft® Lync™ communications software brings together instant messaging (IM) with audio, video, and web conferencing that you can access from almost anywhere.

Find who you need, fast	Meet "face to face"	Connect from Office
<ul style="list-style-type: none"> <li>See who's available at a glance. Color-coded presence icons show you whether someone is available, away from their computer, busy, or offline.</li> <li>Speed up your search. Presence includes pictures, skill search, and location information to help you find who you're looking for quickly.</li> </ul>	<ul style="list-style-type: none"> <li>Easily schedule and join online meetings from the Microsoft Outlook® 2010 email application. It takes just one click to change a meeting request to an online meeting or to join a meeting.</li> <li>Make conference calls seem like in-person meetings. Connect with high-resolution video or share applications or your desktop in online meetings.</li> <li>Extend your meetings to customers and partners. With the web-based meeting attendant, even external participants can join.</li> </ul>	<ul style="list-style-type: none"> <li>Don't leave your email. When you pair Lync with Microsoft Exchange and Outlook 2010, you can see presence icons and initiate chats or calls right from your email message or meeting request.</li> <li>Connect with others from a document or spreadsheet. Lync integrates with Microsoft Office 2010, so you can see presence information and start chatting without leaving your document.</li> </ul>
Connect easily from anywhere	Do more with chat	Get a more social experience
<ul style="list-style-type: none"> <li>Choose how you connect. With a single experience across the PC, phone*, and browser, Lync lets you connect from many devices from almost anywhere you have an Internet connection.</li> <li>Connect externally. You can use Lync to connect with people at other companies, as well as Windows Live® users.</li> </ul>	<ul style="list-style-type: none"> <li>Connect in real time. You can turn an IM chat into an audio or video call at the click of a button.</li> <li>Share photos, files, and links. Whether you're chatting with text, audio, or video, you can send files and other information in your IM window.</li> </ul>	<ul style="list-style-type: none"> <li>Make connecting more fun. Keep up with your coworkers with pictures, activity feeds, and automatic frequent contact lists.</li> </ul>

\* Coming soon







Microsoft

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...this was all you needed to stay in touch and run your small business. No longer. Today, people are more mobile than ever, they use more devices than ever, and they expect instant connectivity no matter where they are. With a little simple technology, you can get a jump on the competition by connecting your employees with each other, your customers, and your partners, in real time, from anywhere.

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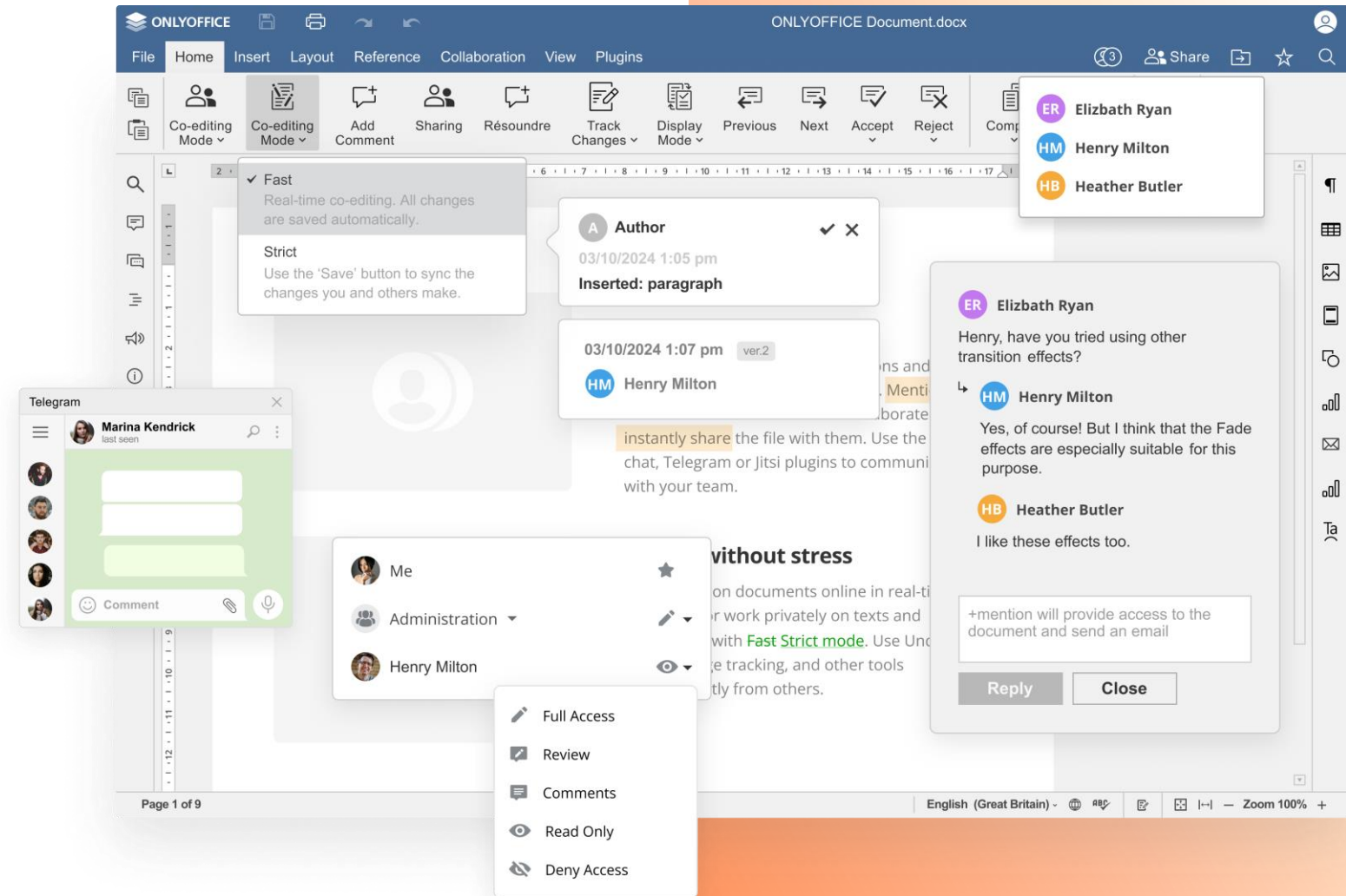


Microsoft

# Expert-level functionality

## Document collaboration without disruption

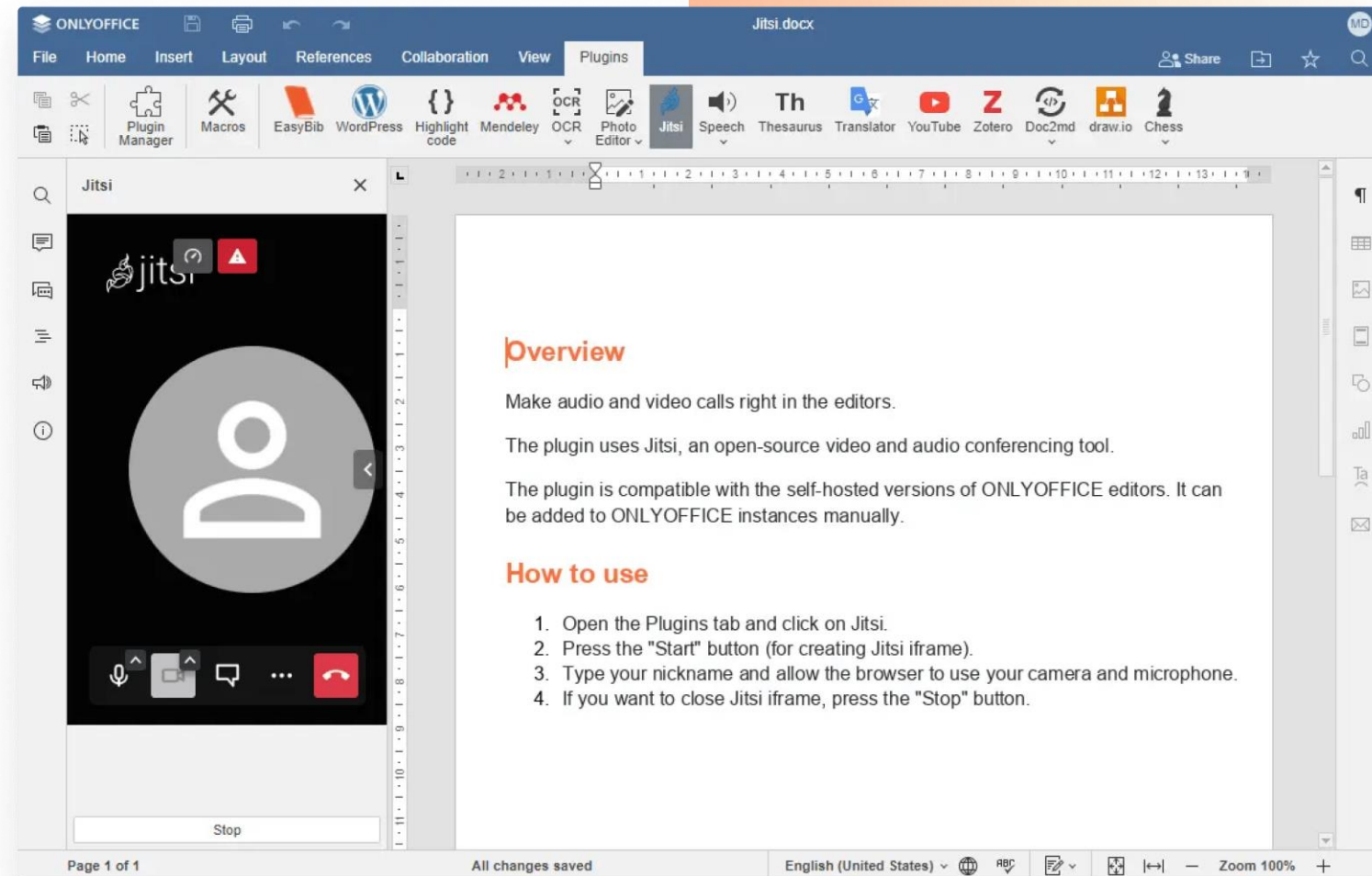
- ✓ **Flexible access** permissions  
(editing, viewing, commenting, reviewing, etc.)
- ✓ **Fast and Strict** co-editing modes
- ✓ **Version history**
- ✓ **Track changes**
- ✓ **Comments**
- ✓ **User mention**
- ✓ **Document comparison**
- ✓ **Document combination**



# Expert-level functionality

## Document collaboration without disruption

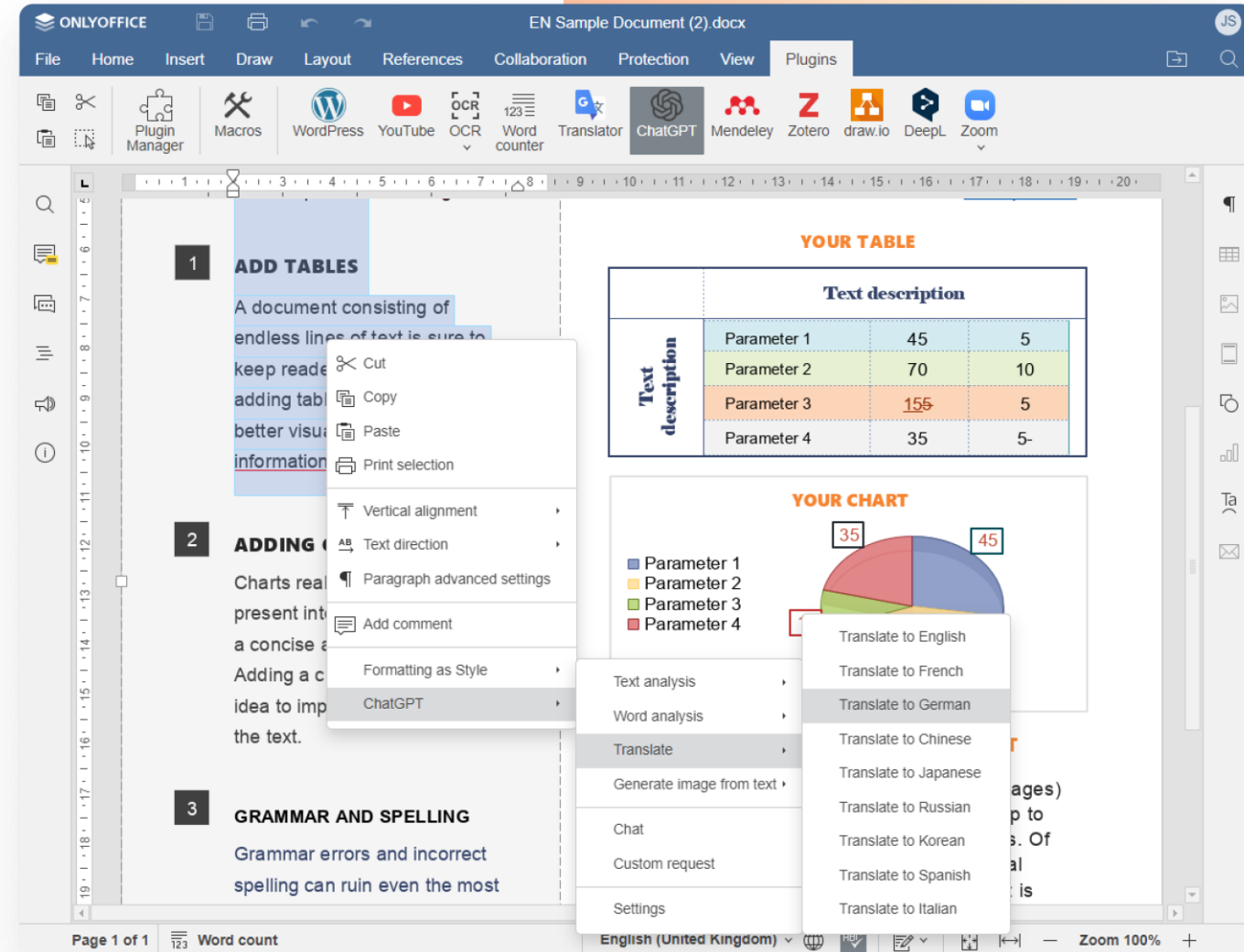
- ✓ **Text messaging in real time**  
via built-in chat
- ✓ **Integration with Telegram**  
via a special plugin
- ✓ **Audio and video calls via Jitsi and Rainbow**



# Integrated AI assistant: Chat GPT

## Personal effectiveness of employees

- ✓ **Legal and accounting:** document preparation, summarizing reports
- ✓ **Marketing:** advertising and testing, PR and press releases, idea generation
- ✓ **HR:** creating job descriptions
- ✓ **Daily tasks:** preparing presentations



The screenshot shows the ONLYOFFICE web application interface. The top menu bar includes File, Home, Insert, Draw, Layout, References, Collaboration, Protection, View, and Plugins. The Plugins menu is open, showing various integrations like WordPress, YouTube, OCR, Word counter, Translator, ChatGPT, Mendeley, Zotero, draw.io, DeepL, and Zoom. The ChatGPT plugin is highlighted.

The main document area displays a document titled "EN Sample Document (2).docx". It contains three sections:

- 1 ADD TABLES**  
A document consisting of endless lines of text is sure to keep readers bored. Adding tables can make your documents better visual and easier to read. **information**
- 2 ADDING CHARTS**  
Charts really help to present information in a concise and clear way. Adding a chart to your document is a great idea to improve the readability of the text.
- 3 GRAMMAR AND SPELLING**  
Grammar errors and incorrect spelling can ruin even the most professional document.

On the right side, there are two visualizations:

**YOUR TABLE**

Text description			
Text description	Parameter 1	45	5
	Parameter 2	70	10
	Parameter 3	155	5
	Parameter 4	35	5

**YOUR CHART**

A pie chart showing the distribution of four parameters. The legend indicates: Parameter 1 (blue), Parameter 2 (yellow), Parameter 3 (green), and Parameter 4 (red). The chart shows values of 35 for Parameter 4 and 45 for Parameter 1.

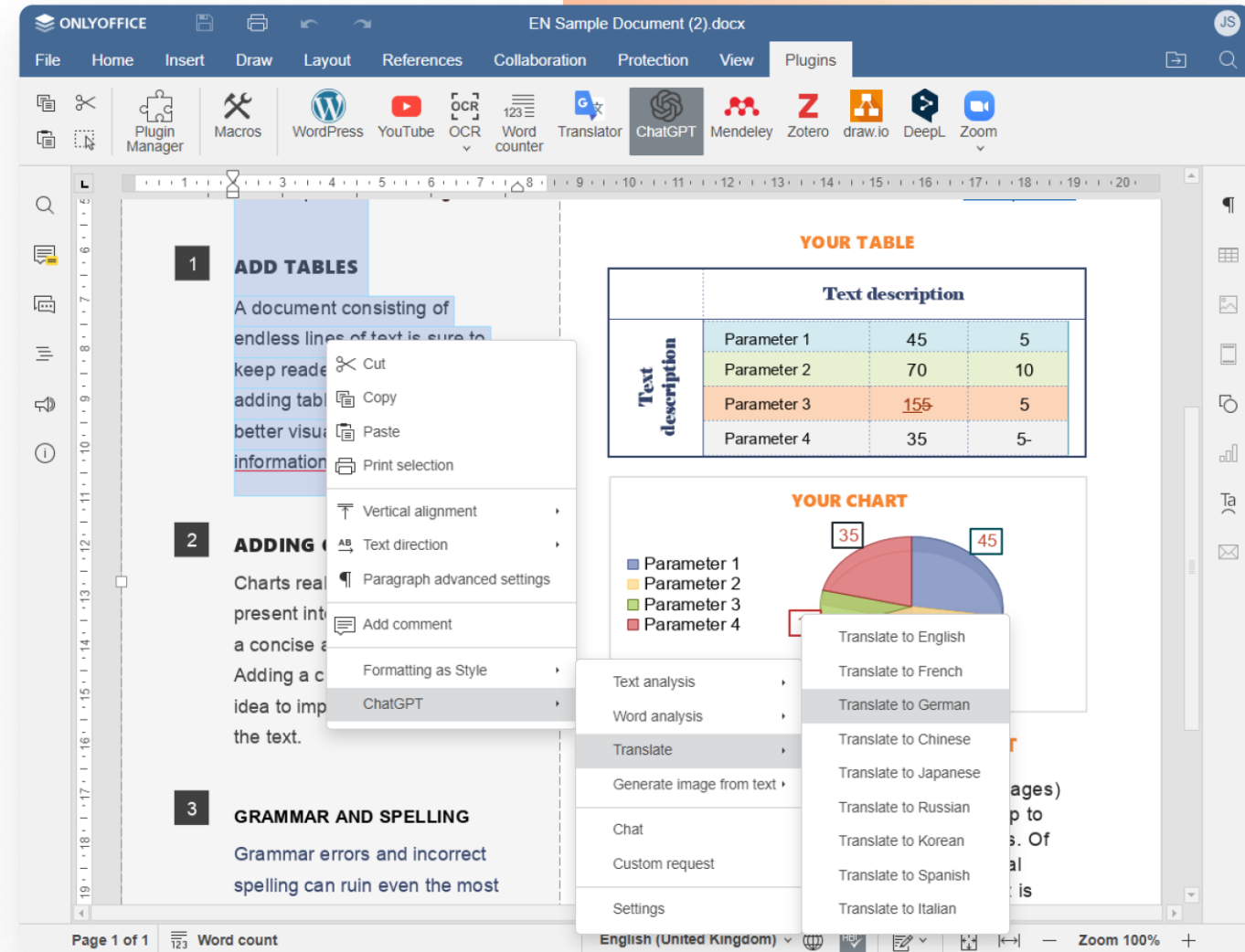
A context menu is open over the text in section 1, with the ChatGPT option highlighted. The menu includes options like Cut, Copy, Paste, Print selection, Vertical alignment, Text direction, Paragraph advanced settings, Add comment, Formatting as Style, and ChatGPT. The ChatGPT submenu is also visible, showing options like Text analysis, Word analysis, Translate, Generate image from text, Chat, Custom request, and Settings. The Translate submenu is further expanded, showing options to translate to English, French, German, Chinese, Japanese, Russian, Korean, Spanish, and Italian.

The status bar at the bottom shows "Page 1 of 1", "Word count 123", and "English (United Kingdom)".

# Integrated AI assistant: Chat GPT



- ✓ Text generation
- ✓ Text summarization
- ✓ Make text longer / shorter/ simpler
- ✓ Rewrite text differently
- ✓ Fix grammar & spelling
- ✓ Image and keyword generation
- ✓ Translation



The screenshot shows the ONLYOFFICE web interface with a document titled "EN Sample Document (2).docx". The "Plugins" menu is open, highlighting the "ChatGPT" plugin. A context menu is also visible over a text selection, with "ChatGPT" as one of the options. The document content includes:

**1 ADD TABLES**  
A document consisting of endless lines of text is sure to keep readers bored. Adding tables can make your document better visually and provide more information.

**2 ADDING CHARTS**  
Charts really help to present information in a concise and clear way. Adding a chart to your document is a great idea to improve the readability of the text.

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Grammar errors and incorrect spelling can ruin even the most professional document.

**YOUR TABLE**

Text description			
Text description	Parameter 1	45	5
	Parameter 2	70	10
	Parameter 3	155	5
	Parameter 4	35	5

**YOUR CHART**

Parameter 1: 45  
Parameter 2: 70  
Parameter 3: 155  
Parameter 4: 35

The interface also shows a sidebar with various tools like Plugin Manager, Macros, WordPress, YouTube, OCR, Word counter, Translator, ChatGPT, Mendeley, Zotero, draw.io, DeepL, and Zoom. The bottom status bar indicates "Page 1 of 1", "Word count: 123", and "English (United Kingdom)".

# Ultimate security:

## Compliance with security standards



HIPAA compliance



ISO 27001 certification



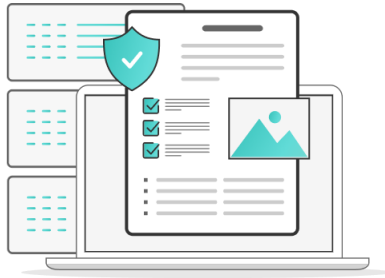
GDPR compliance



HDS certification

# Ultimate security:

## Self-hosted



On your own server



In a data center of your choice

## Different ways to deploy

- ✓ EXE, DEB, and RPM packages
- ✓ Docker image
- ✓ Docker script
- ✓ Virtual appliances
- ✓ 1-Click Apps (Digital Ocean, Vultr, Linode)
- ✓ AMI
- ✓ Alibaba Cloud Image
- ✓ Kubernetes

# Ultimate security:

## Open-source solution



Source code on GitHub:

[github.com/ONLYOFFICE](https://github.com/ONLYOFFICE)





# Ultimate security:

## Data protection

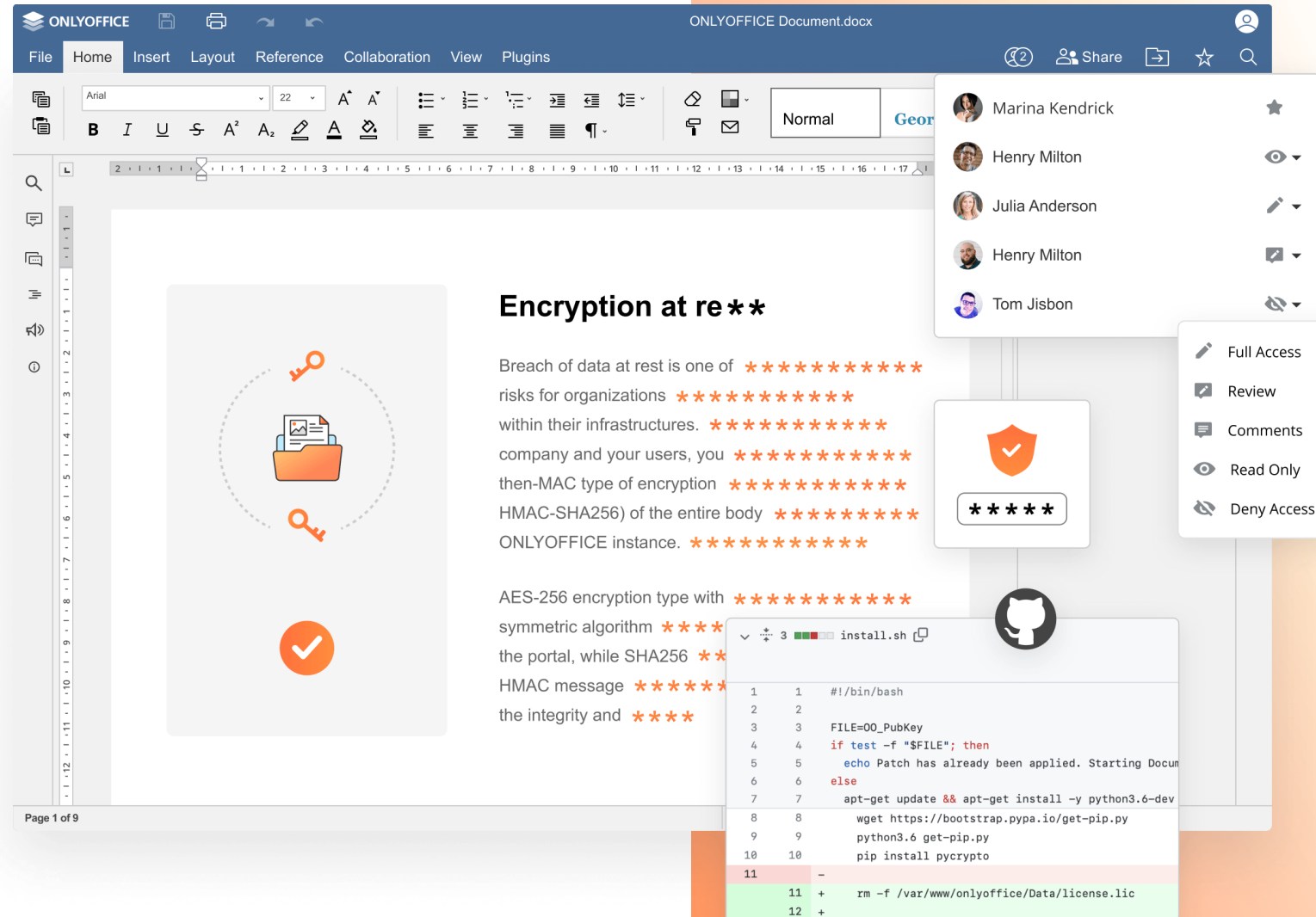
- ✓ **HTTPS** for traffic encryption
- ✓ **JWT**-based protection from unauthorized access
- ✓ **No personal data** stored on servers
- ✓ **End-to-end** encryption



# Ultimate security:

## File protection

- ✓ Password protection
- ✓ Restriction of document copying, downloading, printing
- ✓ Digital signatures
- ✓ Watermarking



The screenshot displays the ONLYOFFICE Document Editor interface for a document titled 'ONLYOFFICE Document.docx'. The ribbon includes 'File', 'Home', 'Insert', 'Layout', 'Reference', 'Collaboration', 'View', and 'Plugins'. The main editing area shows a document with a central graphic of a folder and keys, and a section titled 'Encryption at rest'. The text in this section is partially obscured by red asterisks, indicating redaction. A sidebar on the right shows a list of users: Marina Kendrick, Henry Milton, Julia Anderson, Henry Milton, and Tom Jisbon. Below the user list is a permissions menu with options: Full Access, Review, Comments, Read Only, and Deny Access. A terminal window is also visible, showing a script named 'install.sh' with the following content:

```

1 1 #!/bin/bash
2 2
3 3 FILE=00_PubKey
4 4 if test -f "$FILE"; then
5 5     echo Patch has already been applied. Starting Docu
6 6 else
7 7     apt-get update && apt-get install -y python3.6-dev
8 8     wget https://bootstrap.pypa.io/get-pip.py
9 9     python3.6 get-pip.py
10 10    pip install pycrypto
11 -
11 + rm -f /var/www/onlyoffice/Data/license.lic
12 +

```

# Ultimate security:


## File protection

### Spreadsheet protection


- ✓ Protecting workbook or separate sheets from selected actions
- ✓ Allow editing for specific ranges
- ✓ Hiding formulas
- ✓ Locking spreadsheet elements (cells, texts, shapes)

	January	February
\$	5,640.00	\$ 7,823.00
\$	780.00	\$ 540.00
\$	450.00	\$ 650.00
\$	4,410.00	\$ 6,633.00
\$	5,025.00	\$ 7,228.00
\$	1,230.00	\$ 1,190.00
	28%	18%
\$	3,261.00	\$ 4,574.00


Protection




Encrypt



Protect Workbook



Protect Sheet



Allow Edit Ranges

### Protect Sheet

Prevent unwanted changes from others by limiting their ability to edit.

Password (optional)

Allow all users of this sheet to

Select locked cells

Select unlocked cells

Format cells

Format columns

Format rows

Insert columns

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

Protect

Cancel

# Deep integration into your infrastructure:

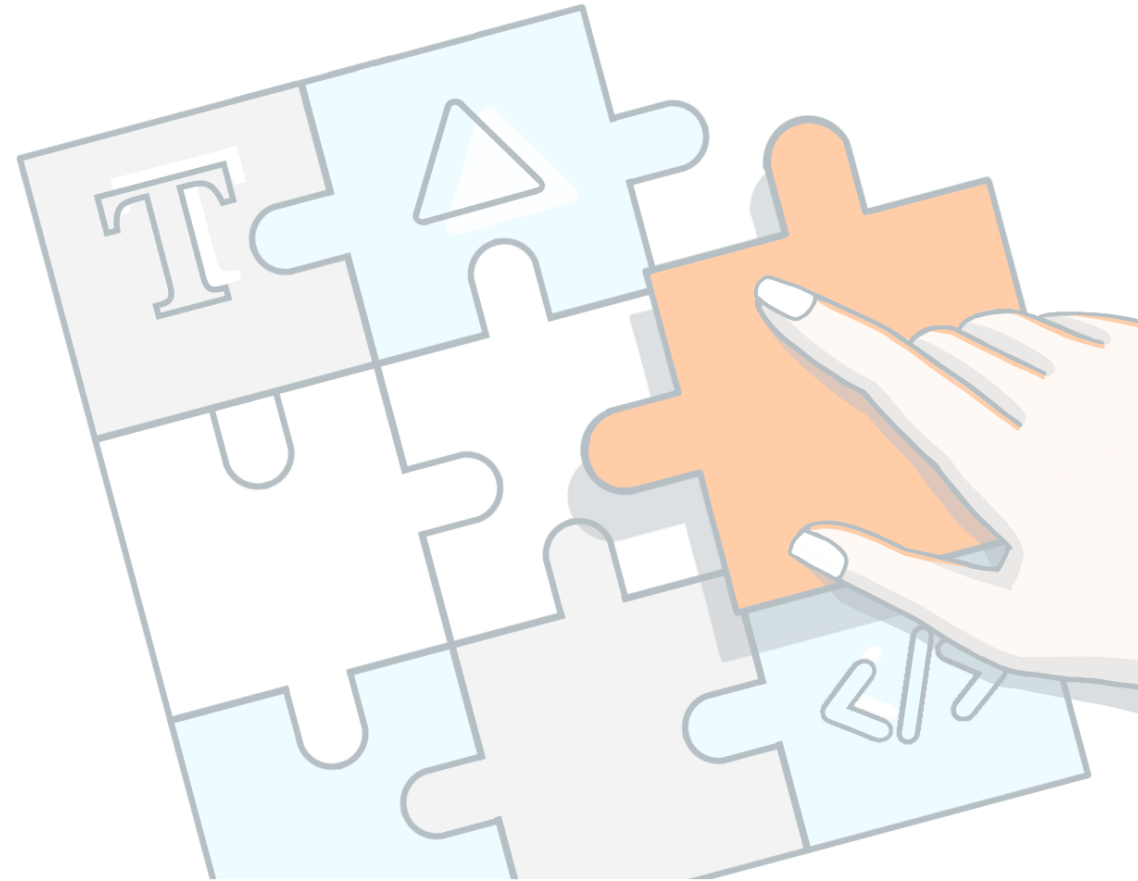
Ready-to-use connectors (40+)



# Deep integration into your infrastructure:

## Embedding into your own solution

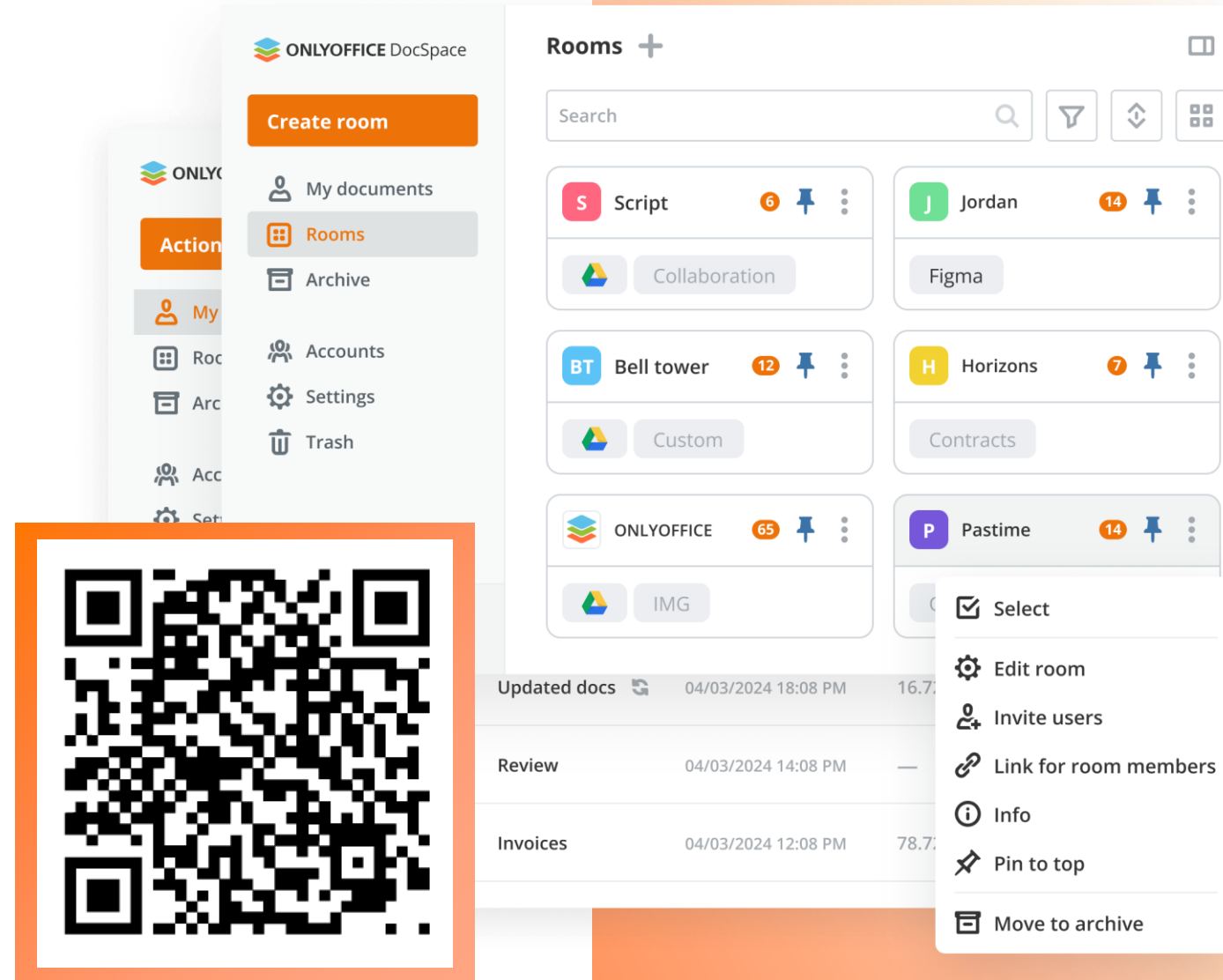
- ✓ Well-documented integration API
- ✓ Support for WOPI protocol
- ✓ Any deployment model: SaaS / on-premises
- ✓ All programming languages supported
- ✓ White Label to deliver the editors under your brand



# Another option to use the editors:

## ONLYOFFICE DocSpace

- ✓ Platform for document collaboration with offices, corporate customers, partners, etc.
- ✓ Customizable rooms for any business purpose (Collaboration, Public, Custom)
- ✓ Flexible access permissions
- ✓ Working with any office files and content
- ✓ Advanced security features
- ✓ Ready integrations (Zoom, WordPress, Drupal, Zapier)



# Beneficial terms



**Easy scalable  
Clustering**



**Per connection licensing**



**Regular updates**



**Professional technical  
assistance**



**Lifetime license**



**Tailored for private company  
infrastructure**

# Test ONLYOFFICE Docs







# Thank you!

Contacts:

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[partners@onlyoffice.com](mailto:partners@onlyoffice.com)

[www.onlyoffice.com](http://www.onlyoffice.com)

