Oz in Office

User Manual

FORCS

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What is OZ in Office?

OZ in Office is a form builder to convert Microsoft Office documents to an e-document with input capabilities. By using OZ in Office, one can easily convert business forms (Contract, application form, approval request, etc.) made with Excel, Word and PowerPoint. Converted forms can be used through a dedicated viewer not only in PC but also in mobile and can be used anytime and anywhere regardless of time and place.

OZ in Office Features

Before, companies had to use separate document development tools to develop Excel, Word, PowerPoint documents into form-based documents. However, with OZ in Office, anyone who is eligible to use Microsoft Office can create and develop form easily.

Features of OZ in Office are

- It is an add-in of Excel, Word and PowerPoint which is easy to install.
- Provide various input components (Signature, CheckBox, TextBox, Camera, VoiceRecorder, etc.)
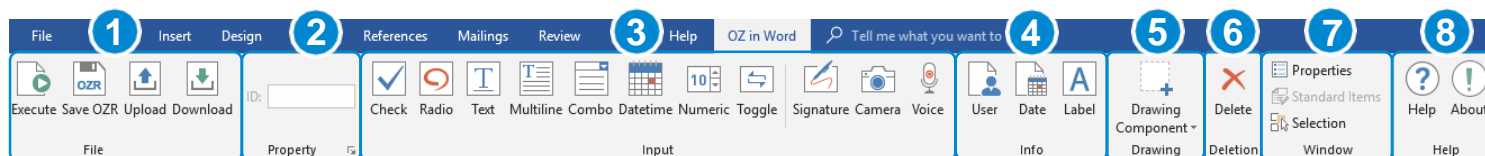- Completed form can be checked promptly by using preview functions and uploaded.

Now, you can easily create form using OZ in Office.

What is OZ in Office?

Learn about OZ in Office

OZ in Office is installed as an add-in of Excel, Word, PowerPoint after the installation of OZ in Office, The ribbon menu gets added on each program.

① File

With the written document, OZ in Office executes eformsign then converts, uploads, or downloads in e-document or saves in the report file.

② Property

Set properties of input components.

③ Input

Add the input components to the form.

④ Info

Add user/date information so the user/date information would automatically displayed on the form.

⑤ Drawing

Add components of Input/Document Info group in desired location and size.
(Only available in OZ in Word/OZ in PowerPoint.)

⑥ Deletion

Delete the OZ in Office input component.

⑦ Window

Set some attributes of the input component as external files. Also, it is possible to select the input component.
(Only available in OZ in Word/OZ in PowerPoint.)

⑧ Help

Check and update version.

What is OZ in Office?

Creating form using OZ in Office

OZ in Office is an e-document builder to convert Excel, Word, PowerPoint documents into a form.

It enables OZ in Office input components to operate. The making process is described below.

Select document for form conversion	➡	Apply OZ in Office components	➡	Preview & upload the form
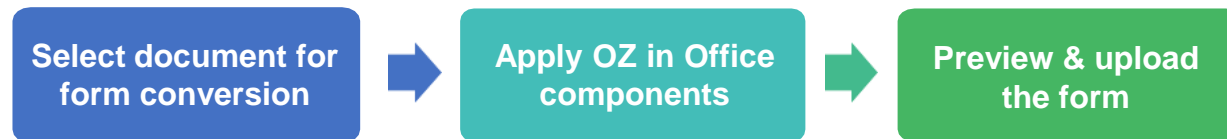
- Select document for form conversion
- Apply OZ in Office components.
- Preview & upload the completed form.

Before using OZ in Office

Add & Delete OZ in Office component

By using OZ in Office ribbon menu, it is able to add input components.

Methods of adding/deleting input components are described below.

① Add component

- **OZ in Excel**

  ✓ Select the cell which to apply input component and click icon in the Input/Document Info group.

- **OZ in Word/OZ in PowerPoint**

  ✓ Select the location which to apply input component and click icon in the Input/Document Info group from ribbon menu.

  ✓ Select the component from dropdown menu which is displayed by clicking **Drawing Component** icon in Drawing group.

② Delete component

Regardless of the component (cell, shape, textbox, etc.), the user may delete the component by clkcing **Deletion** icon in Deletion group.

Properties

Every OZ in Office input components share common properties and have its own properties. Each can be checked via **OZ Component Properties** window. There are **ID** and **Tooltip Text** for the common properties and each properties' meanings are shown below.
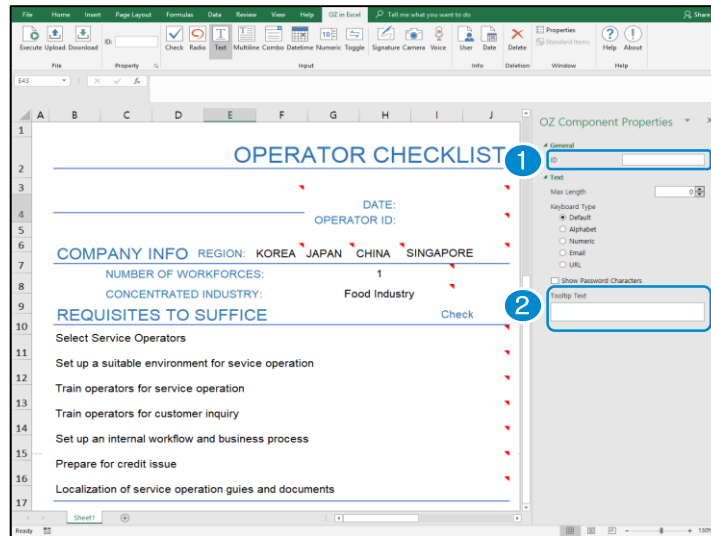
① ID

ID is an unique key that is used to extract input value.

② Tooltip Text

- Windows Environment: Tooltip Text pops up as a text balloon when the cursor hovers over input components.

- Mobile Environment: When the input components are shown in dialog boxes, Tooltip boxes show up as the title.

NOTE

- OZ Component Properties window gets displayed by selecting input component applied location then clicking property icon (⌷) in property group of OZ in Office or by clicking OZ Component Properties on popup menu.

OZ Component Properties ▾ ✕

▲ General

ID _____

▲ Check

Check Style

1

- ○ Radio
- ● Check
- ○ Circle

Tooltip Text

_____
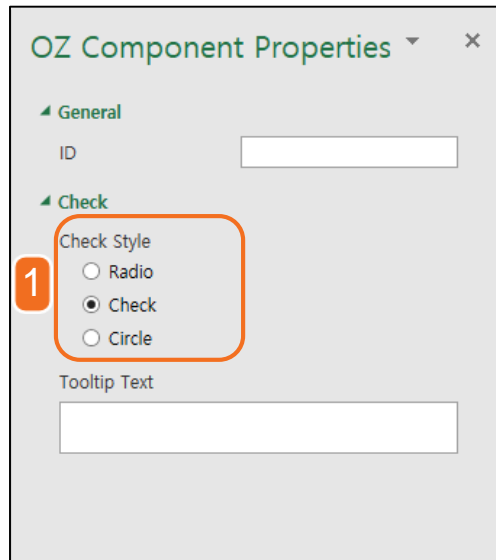
1 Using check style property, ways of selecting items can be set.

♦ **Radio**

RadioButton and its contents are displayed.

| ○ Personal | ○ Medical Treatmen | ○ Family Affair | ○ Vacation | ○ ETC. |

♦ **Check**

CheckBox and its contents are displayed.

| ☑ Personal | ☐ Medical Treatmen | ☑ Family Affair | ☐ Vacation | ☐ ETC. |

♦ **Circle**

Only that particular content is displayed and gets displayed in red when selected.

| Personal | Medical Treatment | Family Affair | Vacation | ETC. |

OZ Component Properties – Radio

1 Using the property ID, the selectable items can be grouped.

2 Set ways of selecting items using selecting style property.

- ♦ **Radio**

  RadioButton and its contents are displayed.

- ♦ **Check**

  CheckBox and its contents are displayed.

- ♦ **Circle**

  Only that particular content is displayed and gets displayed in red when selected.

> **NOTE**
> ・ Radio component is also used when selecting different gender, positions, and etc.. However, property ID must be different from each group to the other in order to let user to select one item from each box.

3 Set behavior of multi-selectable items which are grouped with same ID using its own property.

- ♦ **MultiSelectable**

  Due to the nature of the Radio component, only one item can be selected in the same group. However, multi-selectable property allows you to select more than one item.

- ♦ **Uncheckable**

  Due to the nature of the Radio component, once selected, the other items in the same group must be selected to make already-selected one to be unselected. Uncheckable property enables you to deselect the selected item or group.

OZ Component Properties – Text, Multiline

1 Max Length property sets the maximum number of characters that can be entered.

2 Keyboard Type property sets the type of the keyboard when selecting the Text or Multiline input component.

3 By using Show Password Characters, an input string can be hidden. It is usually used for getting a password input.

・ Keyboard type only works in mobile environment.

NOTE

OZ Component Properties – Combo

1 Using items property, display contents can be set for combo list.

2 By using Allow Empty Value property, a selected item can be unselected.

Due to the nature of Combo, the Combo cannot remain in unselected status once checked. However, if Allow Empty Value property option is enabled, the Combo can go back to the unselected status.

NOTE
· To use Allow Empty Value property, clicking Initialize Input Data from popup menu in PC environment or clicking Recycle Bin icon in mobile environment.

OZ Component Properties – Datetime

1 By using Minimum/Maximum Date property, selectable range of date can be assigned.

2 If the date is not picked but left blank, Display Today for Empty Value property can automatically set the Datetime to today's date.

3 Enabling Allow Empty Value lets the Datetime's value to be deleted. Due the nature of the Datetime, once the date is set, changing into different date is possible but it is impossible to cancel the picked date. However, if Allow Empty Value property option is enabled, the Datetime can go back to unselected status. Although, if the Display Today for Empty Value property is active, the canceled date will have the default value of today's date.

NOTE
· To use Allow Empty Value property, clicking Initialize Input Data from popup menu in PC environment or clicking Recycle Bin icon in mobile environment.

OZ Component Properties – Numeric

1 Unit of Change property sets the amount of numbers to be incremented or decremented when the spin button is clicked.

2 By using Minimum/Maximum value property, selectable range of numbers can be set.

3 Allow Empty Value property allows numbers to be deleted once it has been set. Due to the nature of Numeric, once the number is set, the number can be changed but cannot be deleted or initialized to the initial status. However, by using Allow Empty Value property, the numeric value can be initialized.

NOTE

· To use Allow Empty Value property, clicking Initialize Input Data from popup menu in PC environment or clicking Recycle Bin icon in mobile environment.

OZ Component Properties – Toggle

1 Use items property to set the selectable items in the Toggle.

2 Allow Empty Value property allows selected items to be deleted once it has been set. Due to the nature of Toggle, once the Toggle is selected, the Toggle can be changed but cannot be deleted or initialized to the initial status. However, by using Allow Empty Value property, the Toggle can be initialized.

NOTE

· Toggle is selected sequentially regardless of the number of items.
· To use Allow Empty Value property, clicking Initialize Input Data from popup menu in PC environment or clicking Recycle Bin icon in mobile environment.

OZ Component Properties – Signature

1 By using Signature Pen Thick property, pen's thickness can be determined.

2 Signature Pen Color property determines signature's color.

3 Using Signature Type property, type of entering signature can be set.

OZ Component Properties – Camera, Voice

OZ Component Properties ▾ ✕

▲ **General**

ID

▲ **Camera**

Tooltip Text

- Camera and Voice components do not have any exclusive components but contain only common properties.

NOTE

- By clicking Camera component, it proceeds camera function in camera connected environment but proceeds to window that can select an image file in when there is no camera connected.
- If Voice component is clicked in PC environment, it only works when it is connected to the voice recorder.

1 Configures the document's type and date format using OZ Component Properties of User/Date.

♦ **Format(Only available in OZ in Word/OZ in PowerPoint)**

Configures the date format.

♦ **Document Creator / Date created**

Displays the creator and converted date of the form.

♦ **Current User / Date accessed**

Displays the person who accessed the document or the converted form accessed date.

♦ **Last modified user of the content / Last modified date of the content**

Displays the person who edited the document or the modified date. If this option is enabled, it gets displayed on the input component ID text box below the dialog window and it automatically shows the document information(the person who last modified or the date last modified) of that particular ID.

Preview & Upload form

Log in & Preview form

Preview can let the user to pre-view the document applied with OZ in Office and check if the insertable components are working properly.

When **Execute** icon is clicked, the login page of eformsign service will popup. Once logged in, the converted form will show up.

Practical use of OZ in Office
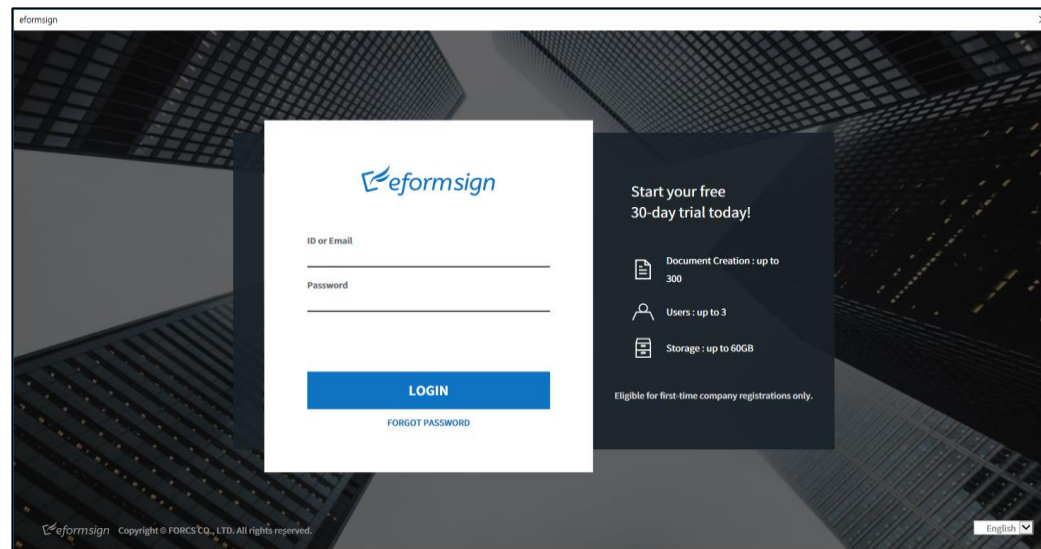
Preview & Upload form

Upload created form

Upload the form applied with OZ in Office components.

① Execute

After selecting the proper server, the user may log in to the service with ID and password. The user can preview the created form after login.

Preview & Upload form

② Upload

The user may upload the created form as a new template by clicking **FORM FILE UPLOAD** on the preview screen or by clicking **Upload** icon on the ribbon menu.

Name, description and category of the form can be set in the Create a Template menu.

Standard Items

Standard Items Component

Apply an external file to the e-document that defines the input components and properties you use repeatedly.

Setting Standard Items

Set the file path of standard_items.xml in ozconfig.xml as below in order to apply the standard items.

```xml
<?xml version="1.0" encoding="utf-8"?>
<serviceInfo>
…
  <standardItems>
   <url>http://127.0.0.1:8080/userservice/standard_items.xml</url>
  </standardItems>
…
<serviceInfo>
```

Save the path's standard_items.xml as below.

```xml
<?xml version="1.0" encoding="utf-8"?>
 <standardItems>
  <categories>
   <category displayName="Patient">
    <item id="PT_ID" displayName="patient ID" type="textBox">
    <item id="PT_KJ_NAME" displayName="patient name" type="textBox">
    <item id="NYUIN_DATE" displayName="hospitalization day" type="dateTimePicker">
    <item id="NYUOUT_DATE" displayName="discharge day" type="dateTimePicker">
    <item id="NOK" displayName="guardian">
    <item id="CONFIRMER" displayName="guardian" type="docUserInfo" />
    <item id="TREATMENT_PLANNING1" displayName="medicine treatment" type="checkBox"/>
    <item id="TREATMENT_PLANNING2" displayName="psychotherapy(counselling, rest)" type="checkBox"/>
    <item id="TREATMENT_PLANNING3" displayName="physiatrics・occupational therapy" type="checkBox"/>
    <item id="TREATMENT_PLANNING4" displayName="etc" type="checkBox"/>
   </category>
  </categories>
</standardItems>
```

① **item id**

The name of input component.

② **displayName**

This is the name of the item displayed in the standard items window.

③ **type**

Set the type of input components.
Input components are as following table.

Standard Items

Standard Items Input Components

Available input components on Standard items are as below.

Type	Input component	Type	Input component	Type	Input component	Type	Input component
checkBox	Check	**radioButton**	Radio	**textBox**	Text	**multiLineTextBox**	Multiline
comboBox	Combo	**dateTimePicker**	Datetime	**numericUpDown**	Numeric	**toggleButton**	Toggle
signPad	Signature	**camera**	Camera	**voiceRecorder**	Voice	**docUserInfo** **docDateInfo**	User Date

Standard Items

Setting standard items in OZ in Office

If you login to repository server and standard_items.xml file exists in the repository, the **Standard Items** icon is activated.
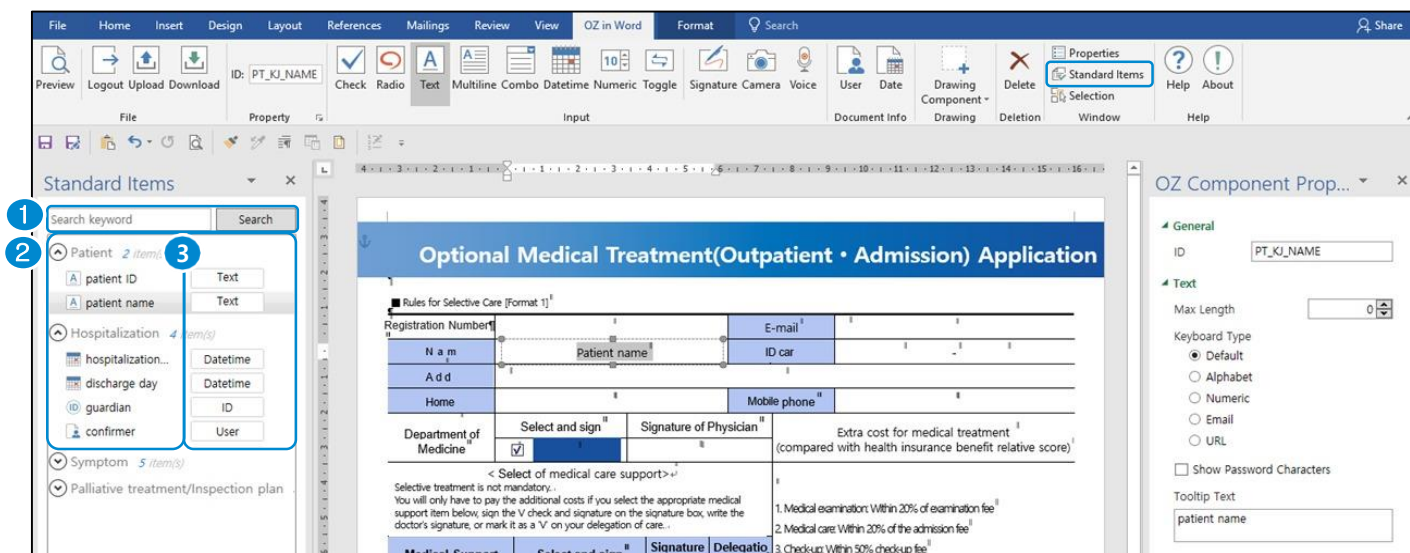
① **Search**	② **Standard items name**	③ **Standard items type button**
Search by standard items name.	A list of standard items that can be set is displayed.	When you click the standard items type button, the standard items is added to the e-document. If the item is already input, the name and type of it change.

Applying EXCEL formula

Basic Operation

EXCEL operations which can be used with OZ in EXCEL input components are shown below.

However, Multiline, Signature, Camera, Voice components are not supported.

Operator	Operation Description	Remark
+	Addition	
-	Subtraction	
/	Division	
*	Multiplication	
( )	Prioritize	
+, /	Sign	
:	Cell address range operation	Only valid for function arguments
,	Cell address union operation	Only valid for function arguments
!	Refers to other sheets	Only valid for function arguments

Applying EXCEL formula

Function

EXCEL functions that can be used with OZ in EXCEL input components are shown below.

However, Multiline, Signature, Camera, Voice components are not supported.

Also, functions other than if should set at least one input component. In this case, applicable components are Text, Combo, Datetime, Numeric, Toggle, User, and Date.

Function	Remarks
IF	IF(condition, value_if_true, value_if_false) forms are supported. Only , <>, >, >=, <, <= comparison operators are supported.
SUM	
LEFT	
MID	
RIGHT	

Function	Remarks

MATCH	• Search method and return value convention based on match_type.
	
	  ✓ **match_type = 1 or omitted**
	    Searches until a value greater than lookup_value is found, returns the value's position when finds the equivalent value, returns the previous value's position when finds the greater value.
	    Returns #N/A if the first value is greater than lookup_value and returns the last value's position if there is no greater value than lookup_value.
	
	  ✓ **match_type = 0**
	    Same as Microsoft Excel operating rule.
	
	  ✓ **match_type = -1**
	    Searches until a value smaller than lookup_value is found, returns the value's position when finds the equivalent value, returns the previous value's address when finds the smaller value.
	    Returns #N/A if the first value is smaller than lookup_value and returns the last value's position if there is no smaller value than lookup_value.

Applying EXCEL formula

Function	Remarks

VLOOKUP	• Search method and return value convention based on range_lookup.
	   ✓ **range_lookup = 1 or omitted**
	      Searches the same as when the third argument (match_type) of the MATCH function is 1. However, returns a value, not a position.
	   ✓ **range_lookup = 0**
	      Same as Microsoft Excel operating rule.

HLOOKUP	• Search method and return value convention based on range_lookup.
	   ✓ **range_lookup = 1 or omitted**
	      Searches the same as when the third argument (match_type) of the MATCH function is 1. However, returns a value, not a position.
	   ✓ **range_lookup = 0**
	      Same as Microsoft Excel operating rule.

Additional Info

User Environment

Item	Requirements
System	Windows Vista Service Pack 2 or higher
OS	Any environment supporting Microsoft Office 2010 or higher
CPU	Over 500 MHz
HDD	Free storage space of 2 GB or more
Memory	256 MB or higher
Monitor	Resolution of 1024 * 768 or higher

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