



Probitas Solutions, Inc

# Office Routing Plus

Instruction Manual

Last Updated 11/25/2010

[www.office-routing.com](http://www.office-routing.com)

# Office Routing Plus® Instruction Manual

Welcome to Office Routing Plus®, a product of Probitas Solutions, Inc., where we strive to give you outstanding products and great service. This manual is created to be used in sequential order; however, you may also click on a section by using on the links in the table of contents below.

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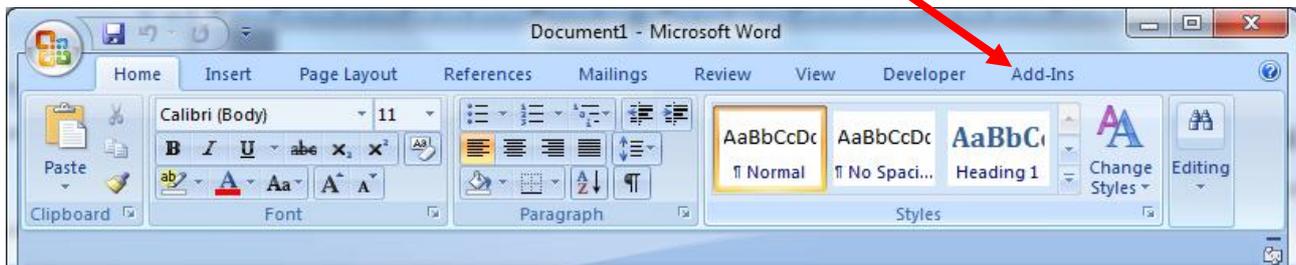
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# Office Routing Plus® Instruction Manual

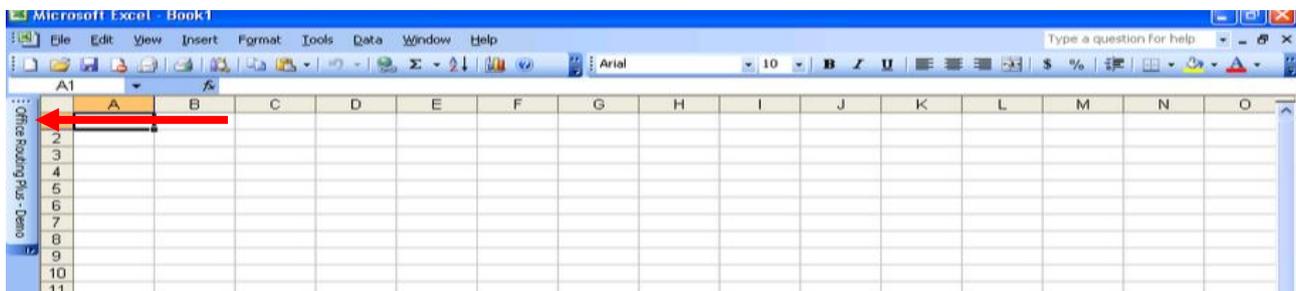
Welcome to Office Routing Plus®, a product of Probitas Solutions, Inc. Follow this easy step-by-step manual to learn how to use Office Routing Plus®.(ORP) ORP can be used in conjunction with Microsoft Word® or Excel® documents.

1. Save the document you want routed. Be sure to title it with an appropriate title.
2. In your Word® or Excel® document, click the Add-Ins button.

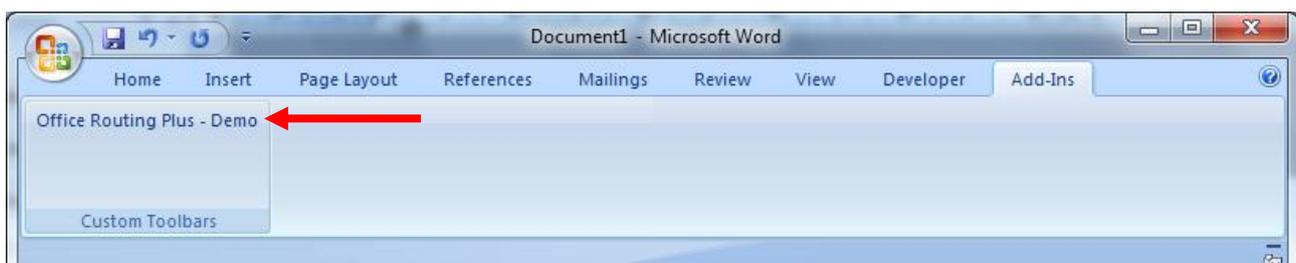
(MS 2007-2010 view)



(MS 2003 view)



3. After clicking Add-ins, the ORP toolbar will pop up. (After purchase, the word Demo will not appear.) Click the tab to open ORP.



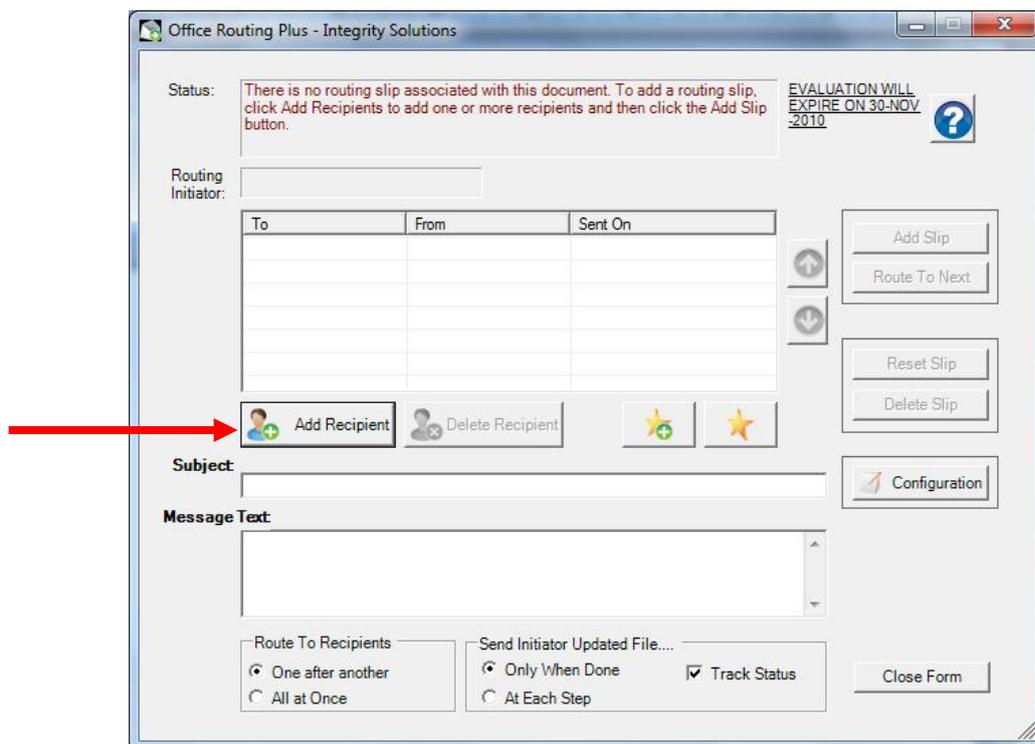
4. You should see this screen:

The screenshot shows the 'Office Routing Plus - Integrity Solutions' window. At the top, a status message reads: 'There is no routing slip associated with this document. To add a routing slip, click Add Recipients to add one or more recipients and then click the Add Slip button.' To the right of this message is a blue question mark icon and a warning: 'EVALUATION WILL EXPIRE ON 30-NOV-2010'. Below the status message is a 'Routing Initiator' text field. A table with columns 'To', 'From', and 'Sent On' is present. To the right of the table are 'Add Slip', 'Route To Next', 'Reset Slip', and 'Delete Slip' buttons. Below the table are 'Add Recipient' and 'Delete Recipient' buttons, along with two star icons. A 'Subject' text field and a 'Message Text' text area are located below the table. At the bottom, there are two sections: 'Route To Recipients' with radio buttons for 'One after another' (selected) and 'All at Once'; and 'Send Initiator Updated File...' with radio buttons for 'Only When Done' (selected) and 'At Each Step', and a checked checkbox for 'Track Status'. A 'Close Form' button is at the bottom right.

5. The initiator can choose specific options such as routing to recipients sequentially or all at once, and selecting to have the updated file be sent back to the initiator at each step or when the document has been completely through the routing process. Selecting "Track Status" will cause the program to send an email with updates back to the initiator after each person has received and re-routed the document. To do this, click the desired options.

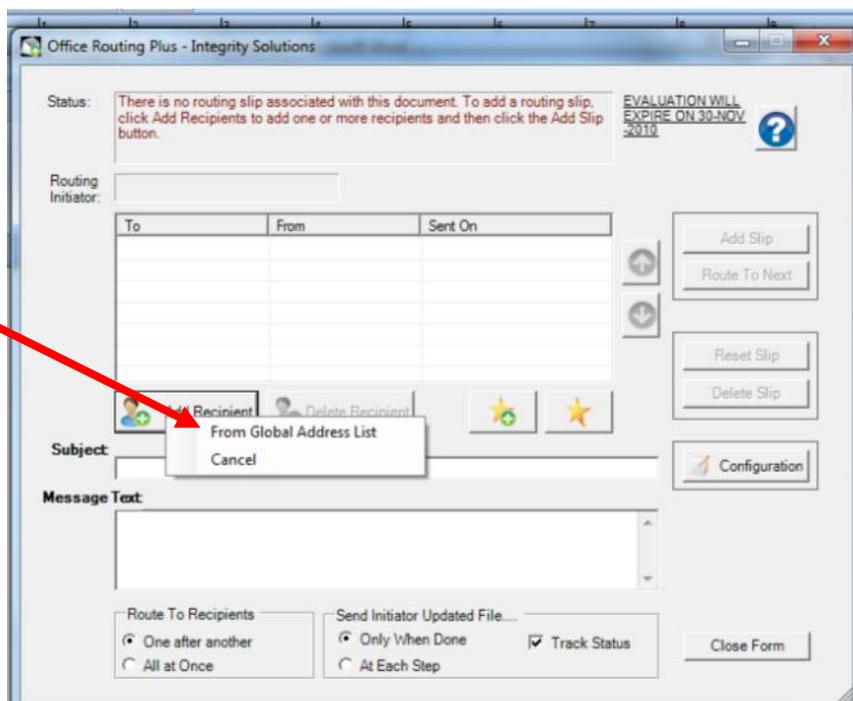
This screenshot is identical to the one above, but with two red arrows pointing to specific options. One arrow points to the 'One after another' radio button under the 'Route To Recipients' section. The other arrow points to the 'Track Status' checkbox under the 'Send Initiator Updated File...' section.

6. From here the initiator can sequentially add recipient(s) who should receive the document. To do this, press the “Add Recipient” button.



7. Clicking on the “Add Recipients” button will bring up the Global address list on a drop down menu.

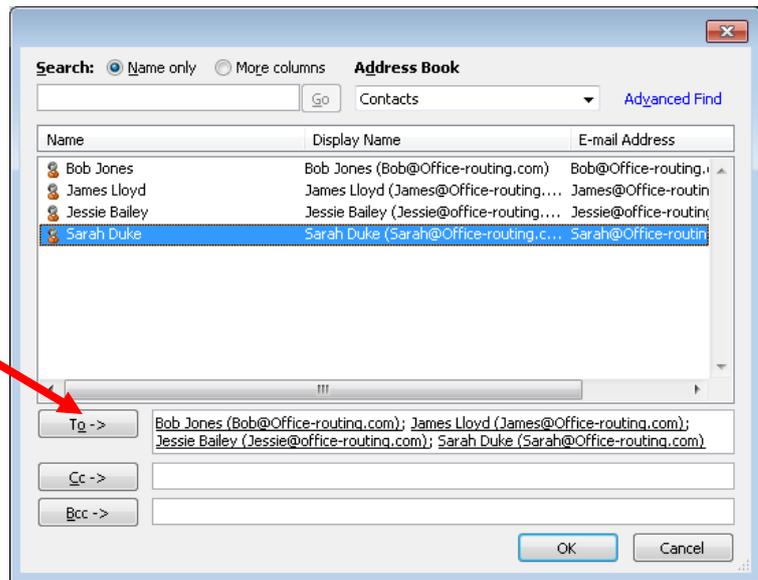
\*If your Global address book does not pop up on the drop down menu, you will see “Manual List” option or “Active directory” instead. For instructions on how to change the “Select Recipient Mode,” [click here.](#)



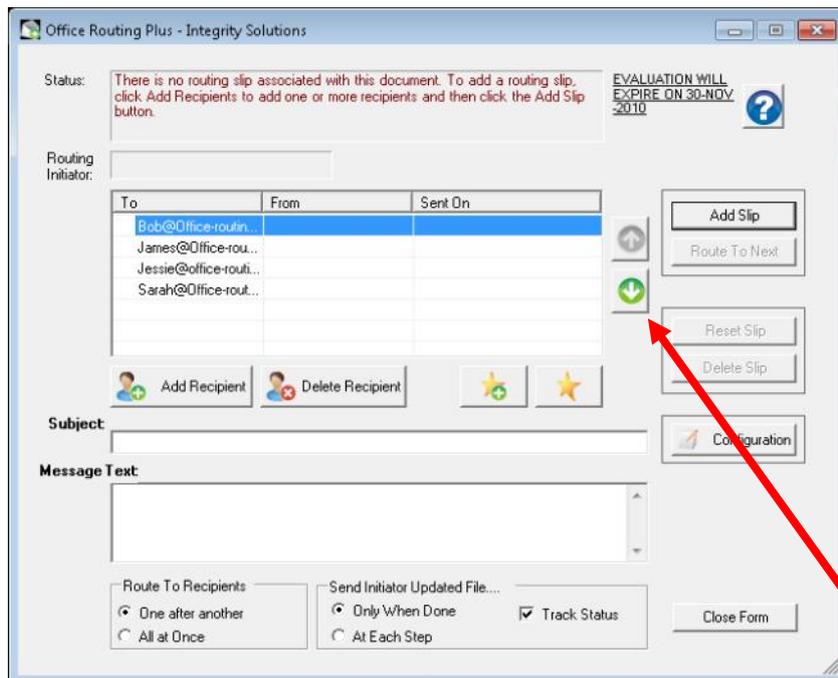
8. From your address book, choose the names of those who should handle the document. Double click on the name.

Names and addresses should be seen in the "TO" box.

Click OK.



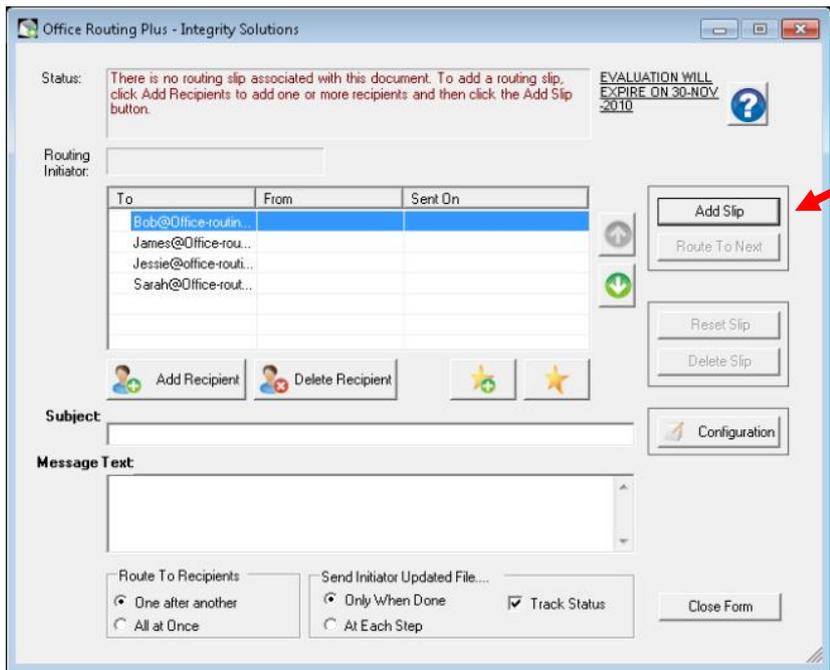
9. The following box should appear:



\*Be sure the recipients are in the correct order. If they need to be changed, use the arrow keys to the right of the recipient box to reorder them.

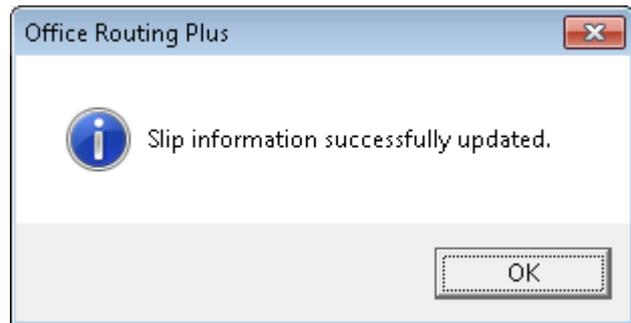
\*For instructions on deleting or bypassing a recipient, see [Appendix 2](#).

10. At this point, the status will say, "There is no routing slip associated with this document..."

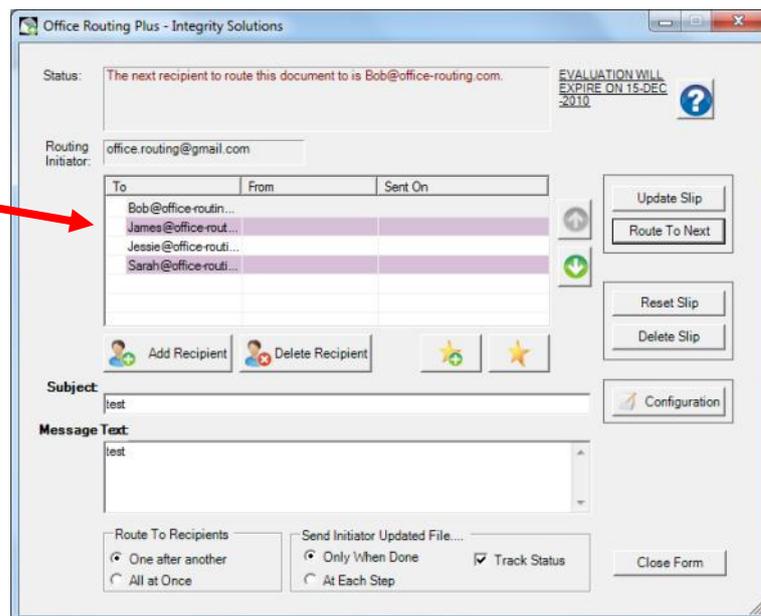


Click the "Add Slip" button.

Then click OK once this screen appears.



You'll notice that doing this will create alternating colored lines.



11. Enter a meaningful subject in the subject line. And any appropriate message in the “Message Text” box. These will become the subject and message of the emails sent through the routing process. \*Note, any recipient downstream can change the subject and/or message accordingly.

Office Routing Plus - Integrity Solutions

Status: The next recipient to route this document to is Bob@office-routing.com. EVALUATION WILL EXPIRE ON 15-DEC -2010

Routing Initiator: office.routing@gmail.com

To	From	Sent On
Bob@office-routin...		
James@office-rout...		
Jessie@office-ruti...		
Sarah@office-ruti...		

Update Slip  
Route To Next  
Reset Slip  
Delete Slip  
Configuration

Add Recipient Delete Recipient

**Subject**  
Office Routing Manual Demonstration

**Message Text**  
The following products walks a user through Office Routing Plus, a product of Integrity Solutions.

Route To Recipients:  One after another  All at Once

Send Initiator Updated File...:  Only When Done  At Each Step  Track Status

Close Form

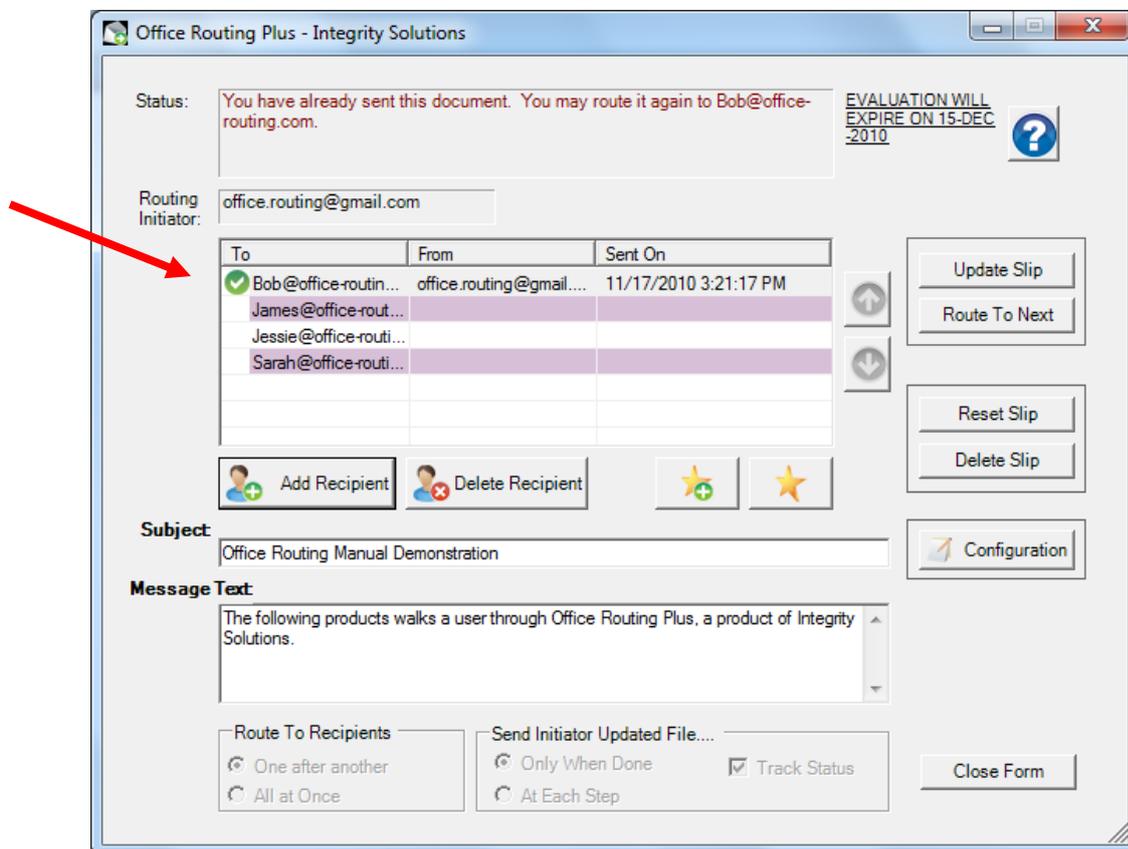
12. Click the “Route to Next” button. (A copy of the document should be in the sent box of the initiator’s email system.) Click OK.

Office Routing Plus

Message will be routed to Bob@Office-routing.com

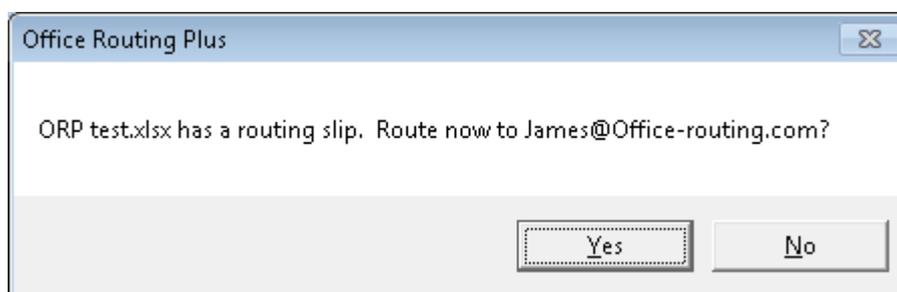
OK Cancel

13. The second person in the list will receive an email with a file attached. He or she should open the attachment to make any necessary changes or to approve the document.
14. The second person can do one of two things. (1) Clicking the Add-Ins button shown in steps 2-3 will bring up the following screen. Then click the “Route to Next” button.  
\*Notice the first person in the list has already been checked.



OR

- (2) Close the document, in which case the following screen will pop up. Clicking yes automatically routes the document to the next person.



\*Note: Regardless of which of the two options above is chosen to route to the next recipient, there is no need to save any document changes you have made before routing it. Office Routing Plus will always route the “in-memory” version of the document—in other words, the up-to-date file will always be sent.

15. Repeat this process until all recipients have received the document. The last person in the list should route to next, which sends the document to the initiator. This completes the routing process.

## Reset Slip Instructions

Resetting the slip clears the routing history but saves the names chosen to be used again at a later date.

1. As you can see in the screen below, a green check-mark has been placed next to a user who has already received the document. Once the document has been routed, the same list of recipients may be used again. To clear the routing history, hit the “Reset Slip” button.

To	From	Sent On
Bob@office-routin...	office.routing@gmail...	11/17/2010 3:21:17 PM
James@office-rout...		
Jessie@office-routi...		
Sarah@office-routi...		

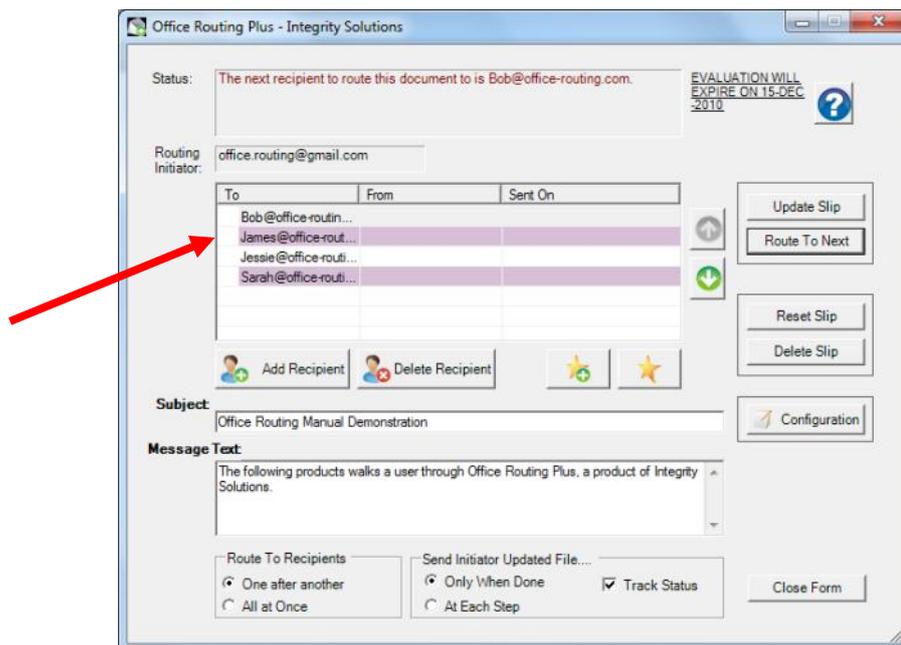
2. Once this is done, a confirmation box will appear.

3. Click on “yes”.

Are you sure you want to reset the routing slip on this document?

Yes No

- Once completed, you'll notice the green arrows are gone and your list is ready for the next time you need to use it to route this document.

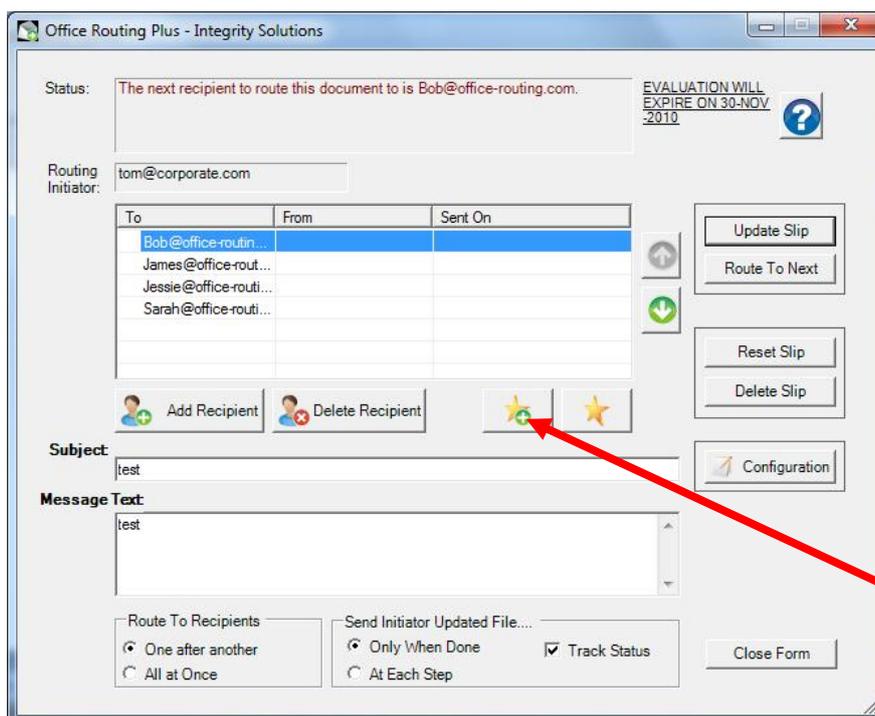


## Appendix 1

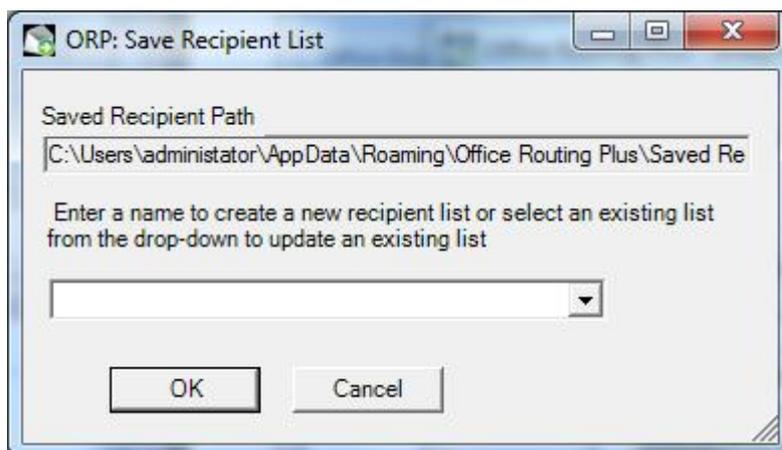
### Saving Recipient Lists

Saving Recipient Lists allows you to create a file where specific lists of recipients are stored in the order you've selected them. This allows you to retrieve the entire list of saved recipients in one click for use at a later date.

- To save the recipients as a list with a file name, click on the Star+ button.

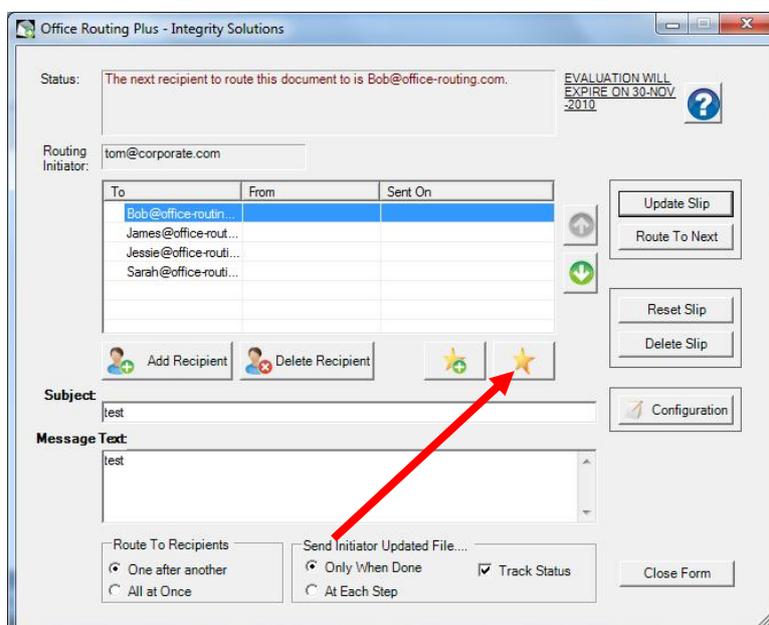


2. Give the list an appropriate title and click OK.

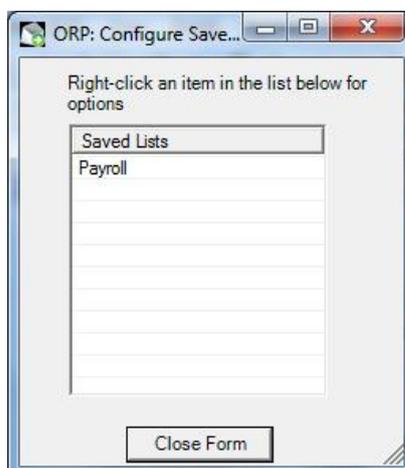


3. Now, when you click the Add Recipients button, your list should appear in the dropdown menu.

4. The Star button allows you to manage or rename your lists.



5. From this screen you can manage your lists, delete lists or rename lists. Right click on the recipient list names, for options.

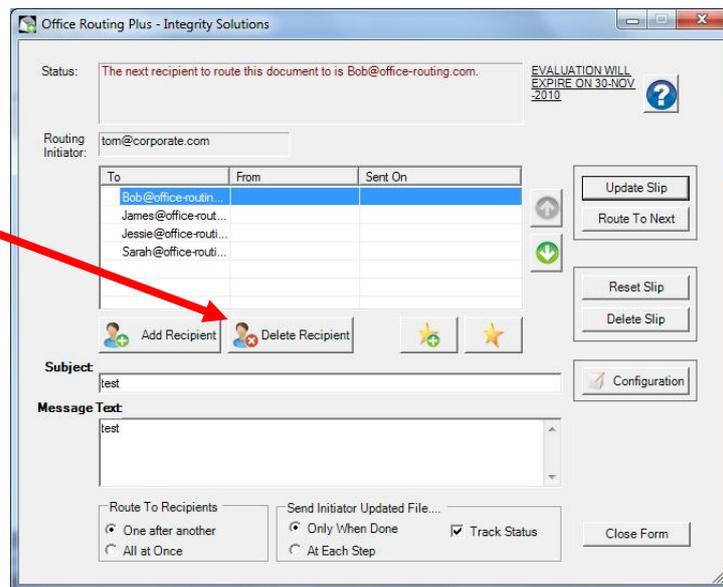


## Appendix 2

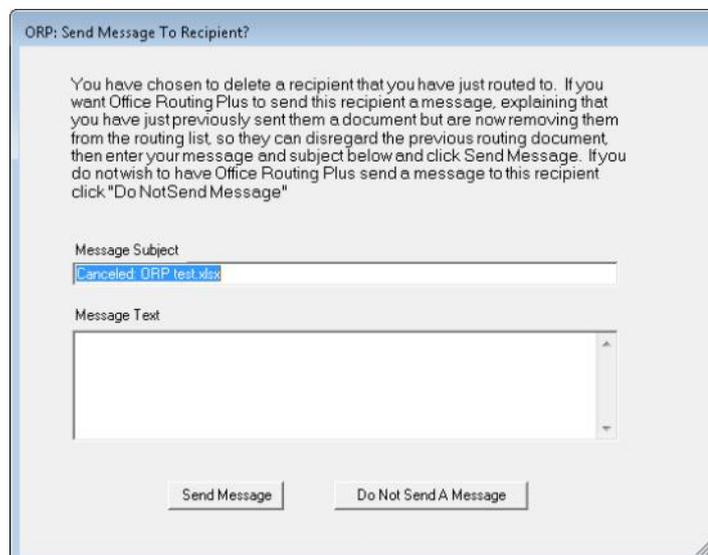
### Deleting or Bypassing a Recipient

In the case of an “Out of the office” recipient, there may be times when deleting or bypassing a recipient is necessary.

1. If a recipient needs to be deleted from the list, the initiator (or anyone receiving the routed document) can do so when setting up the list. Do delete a recipient, highlight the recipient and click on the “Delete Recipient” button. This should automatically delete the persons name from the list. \*Note: a person who has already received the document through the routing process may not be deleted. (with the exception shown in #2 below.)

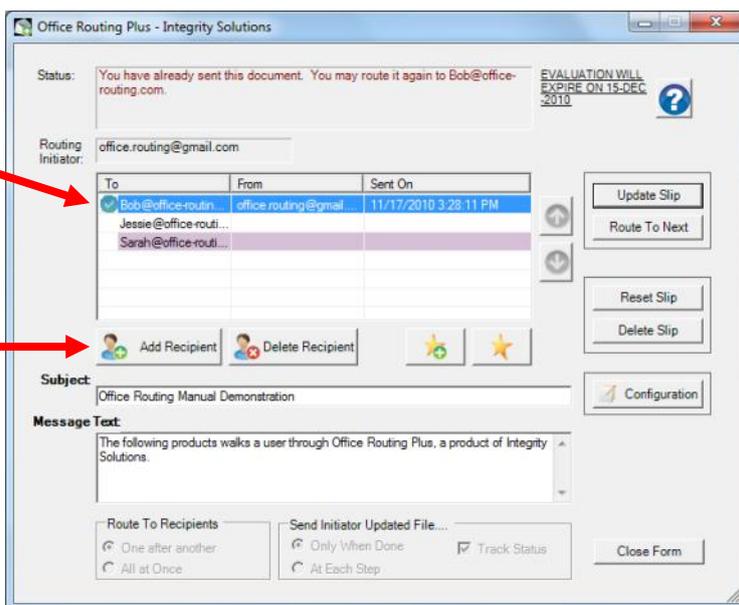


2. In the case of a recipient receiving an “Out of the office” email after routing the document, bypassing that user will be necessary.
3. In this case, highlight the user and click on the “Delete Recipient” button as shown above. The following pane should appear: \*Note: A user will only be allowed to delete a recipient who has received the document if he or she has routed the document to that user.



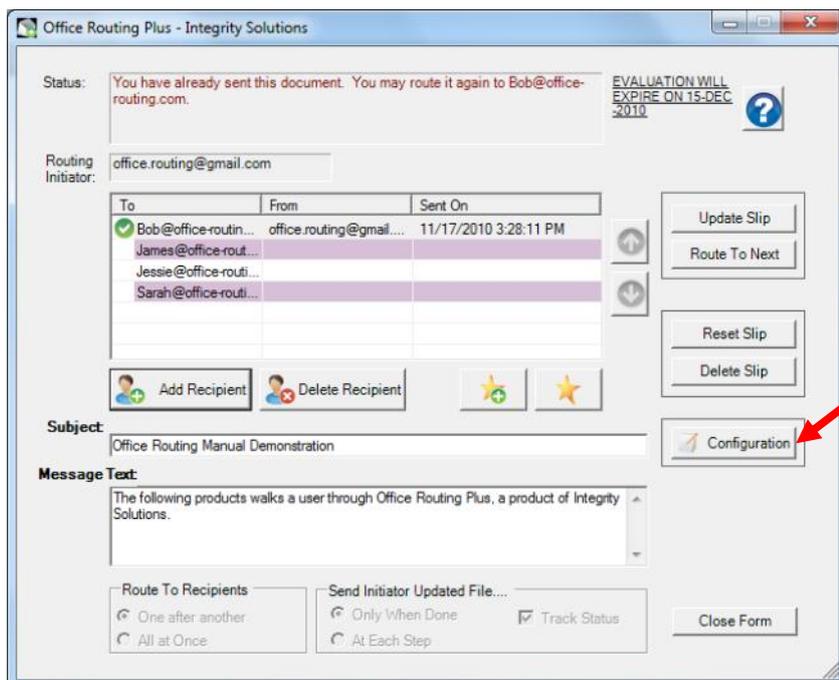
- The previous pane allows you to personalize a message to the absent recipient. This could be used to indicate the slip has already been routed and no further steps are necessary by that recipient.
- The user must then add an appropriate recipient in place of the absent one. To do this, follow the add recipient instructions found [here](#). Then use the green arrow keys to move the recipient up or down in the list as necessary.

(With one recipient missing, a new user will need to be added.)



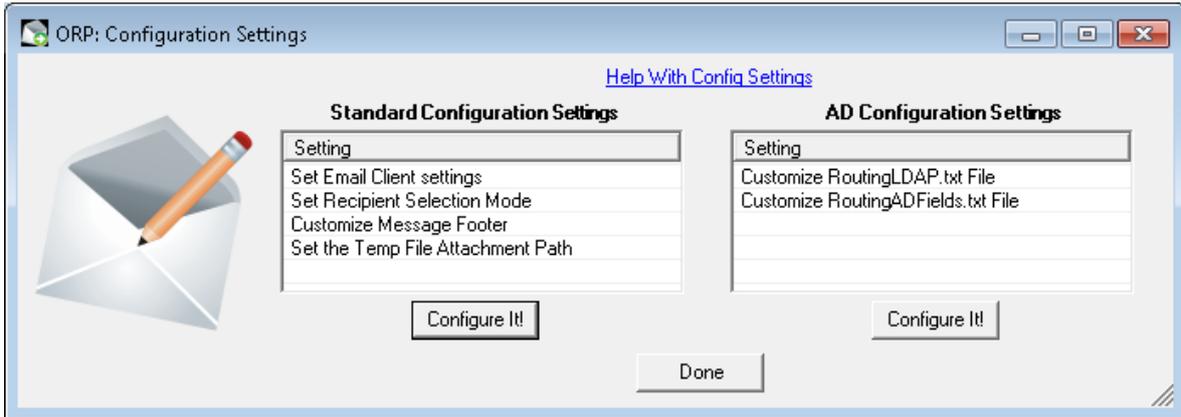
## Appendix 3

### Configuration Settings



To find the configuration settings, click on the configuration button.

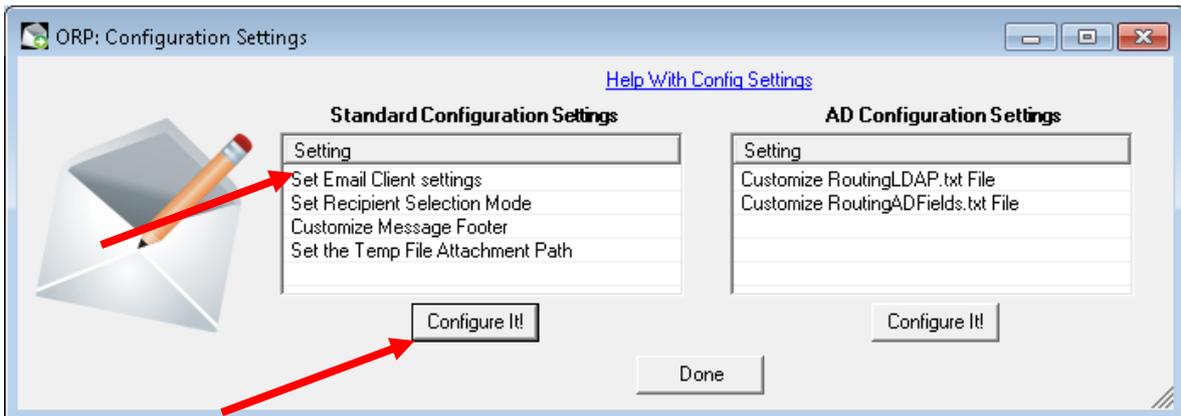
The following screen should appear:



From here you can select which configuration setting to modify.

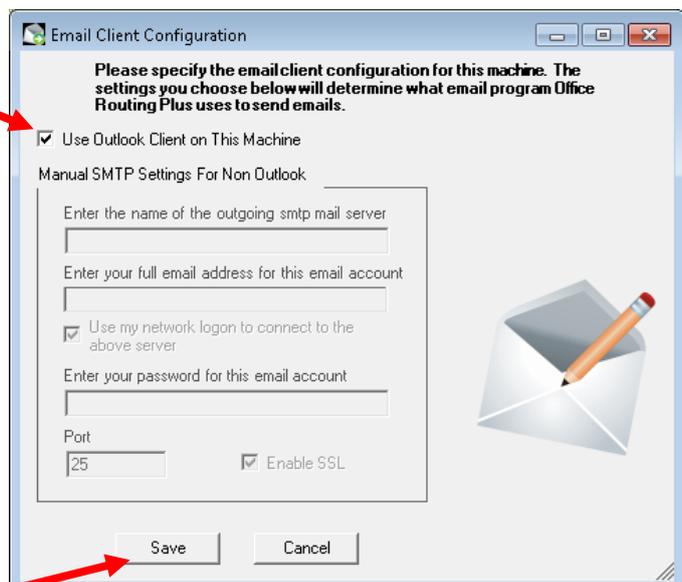
### Set Email Client Settings:

This setting will tell Office Routing Plus® what email settings to use in order to send emails/route documents.



1. Select setting and click the "Configure It!" button.
2. The following screen should appear:

Most organizations will check "Use Outlook Client on this Machine." However, if Outlook does not exist on your machine, you may configure the SMTP settings on the form. Whether you choose to use Outlook or configure the SMTP settings manually for any other email account, the documents you route will be in your sent folder for that email account.

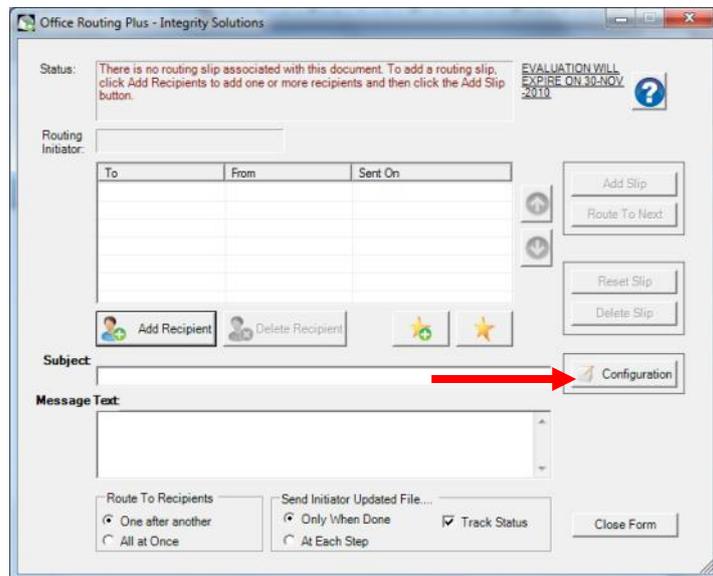


3. Enter information and click "Save."

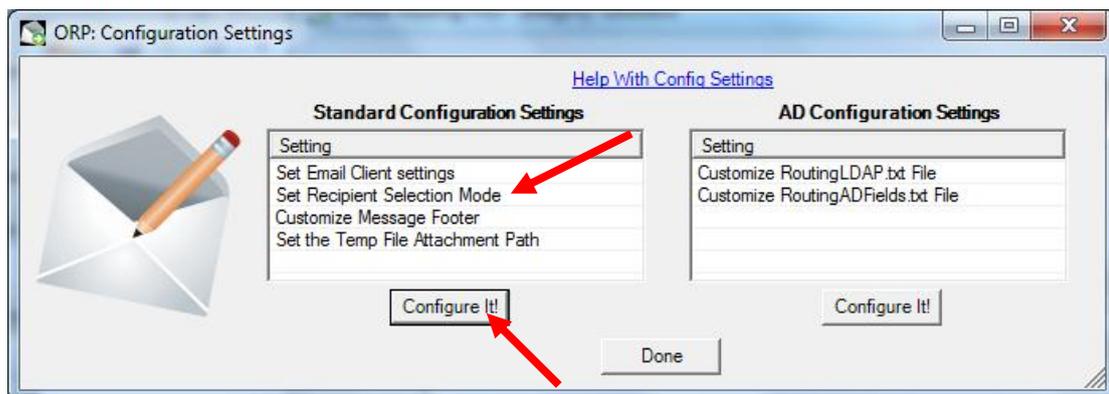
## Set Recipient Selection Mode Manually Inserting Recipients

If you need to manually insert recipients into your routing slip, follow these instructions.

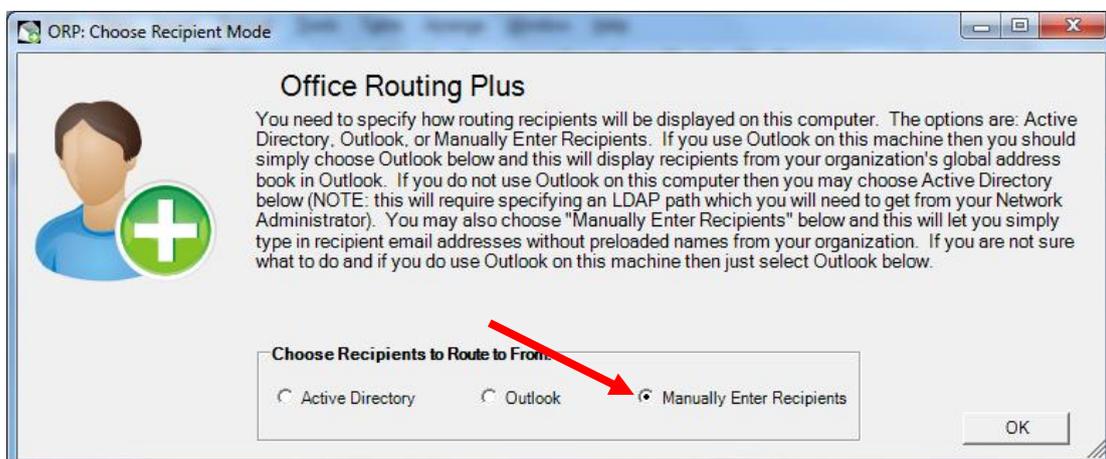
1. Click on the Configuration button.



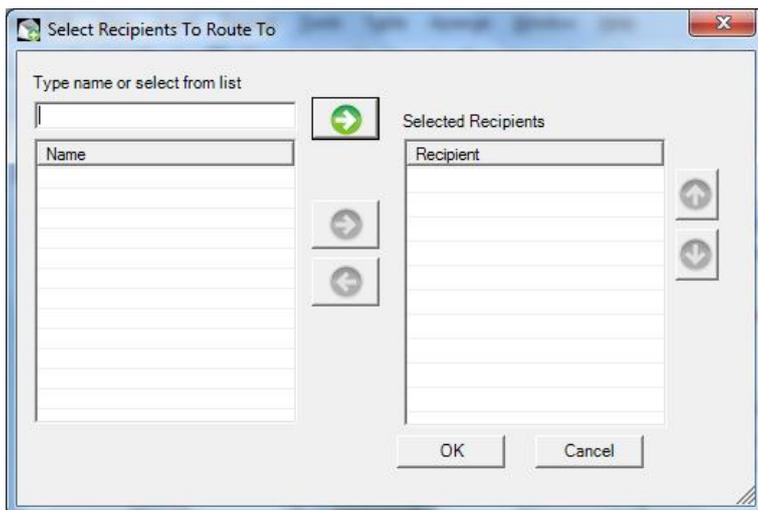
2. Select "Set Recipient Selection Mode." Then click the "Configure It" button.



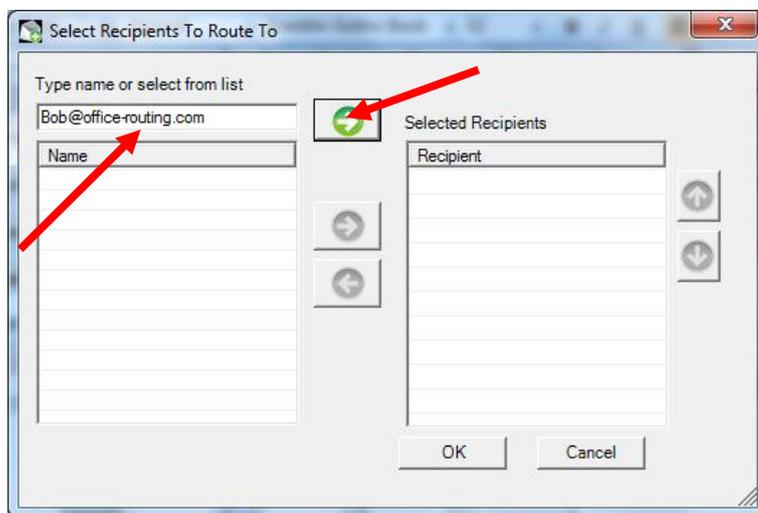
3. Select Manually Enter Recipients and click OK.



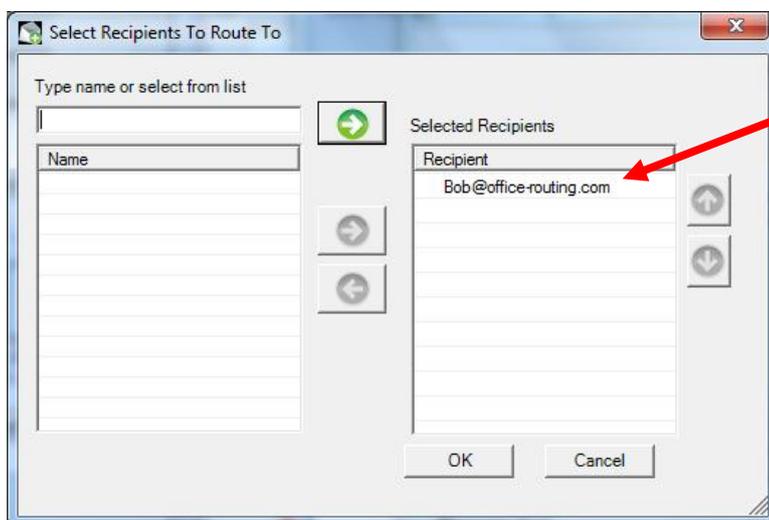
- When you click the Add Recipients button and select “Manually” from the drop down list, the following screen will appear:



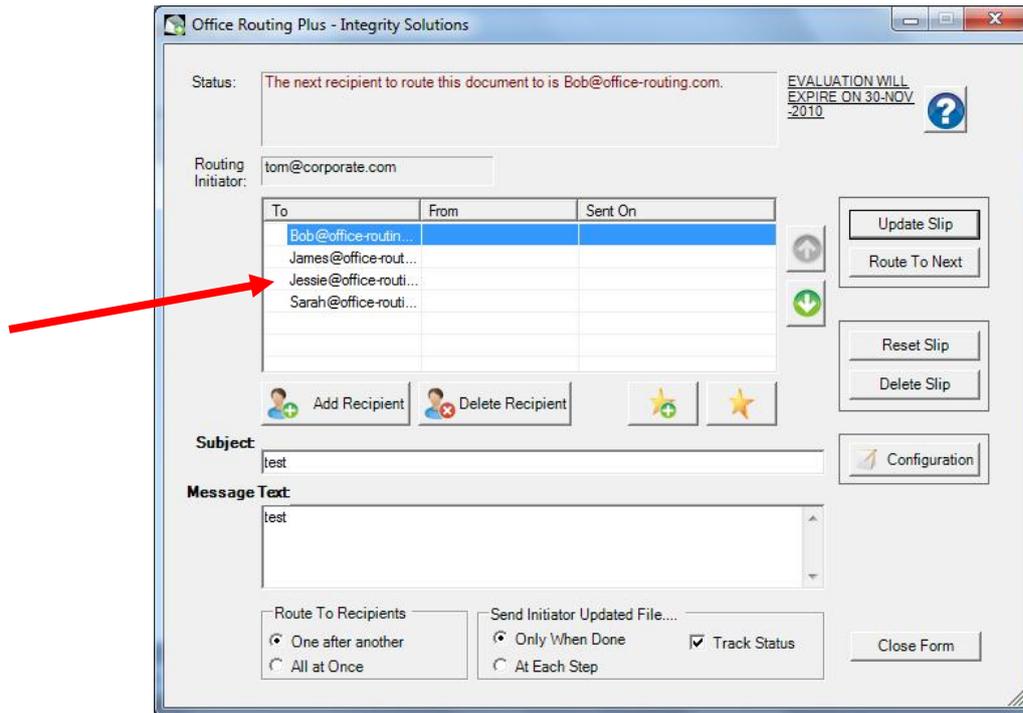
- Type in the email address of the person who should receive the document into the Type Name box. Then click the green arrow button.



- The address should now appear in the list to the right. Continue this process until you have entered all desired addresses. Then click OK.

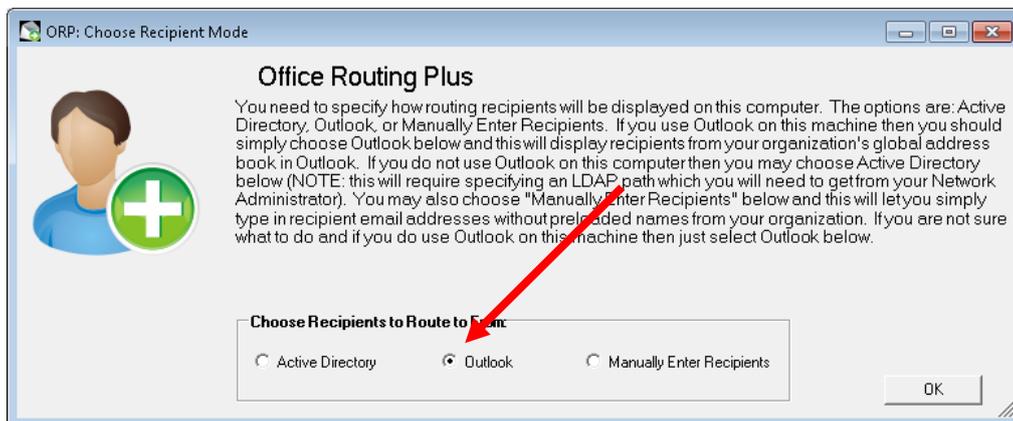


7. The addresses should now appear in your Routing list.



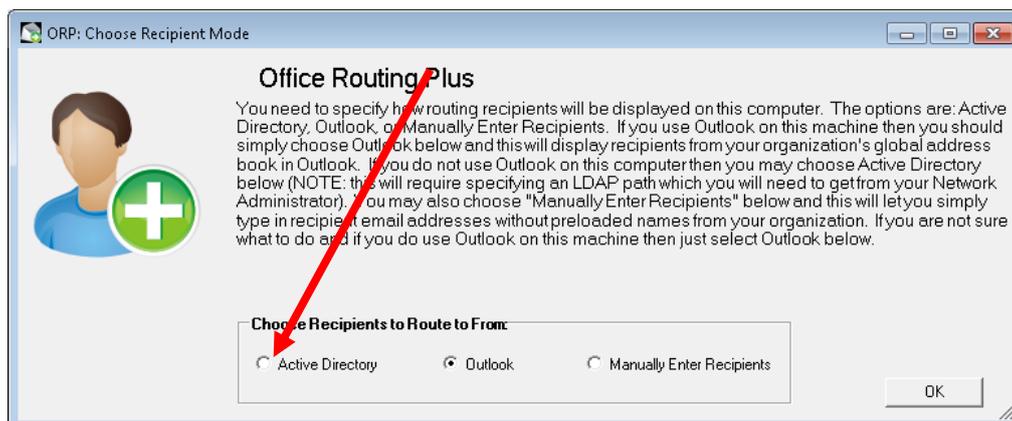
## Choosing Outlook

1. If Outlook is running on your computer, selecting outlook from the “Set Recipients Selection Mode” will allow you to use Outlook’s global address book.



## Choosing Active Directory

1. Use the same method to select “Active Directory.”

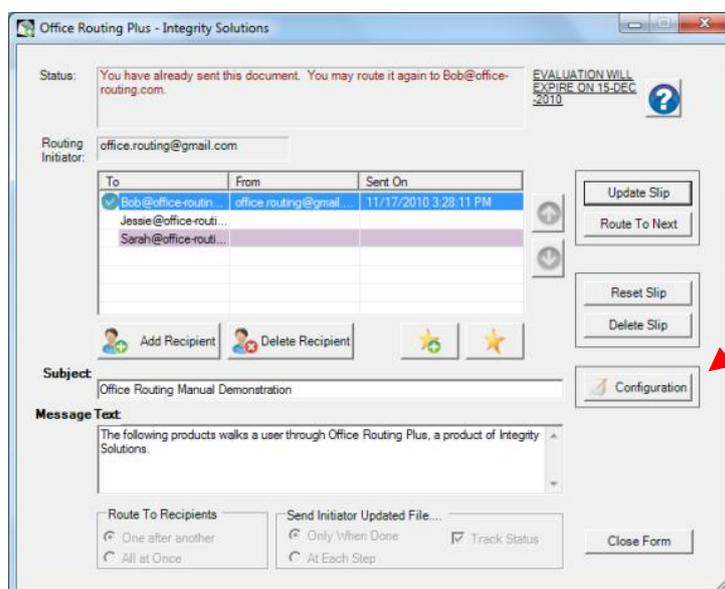


2. If you do not use Outlook on this computer and don't want to manually enter recipients, then you may choose Active Directory to select your company's address book. \* Note: This will require specifying an LDAP path. [Click here](#) for more detailed instructions on how to specify active directory LDAP paths.

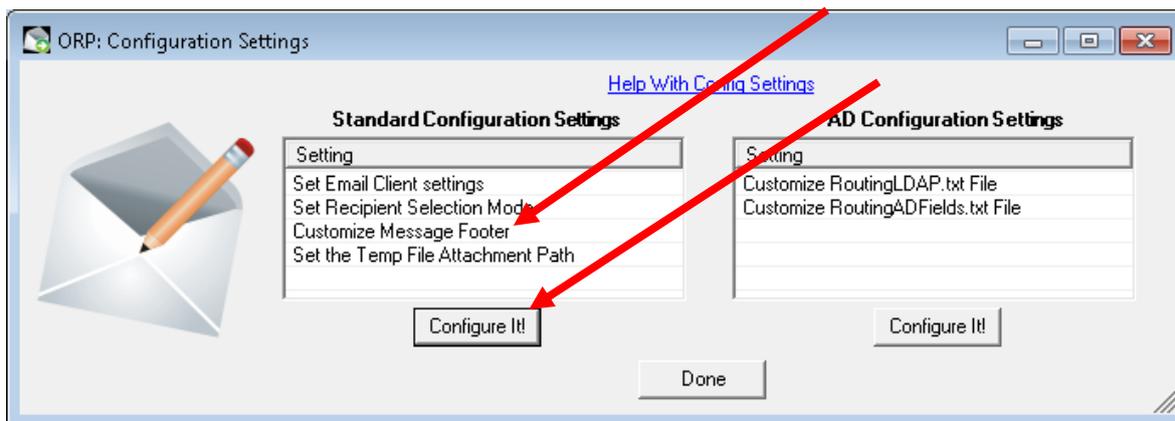
## Customize Message Footer:

This option is used to customize the footer section of the emails that get sent out via the routing add-in.

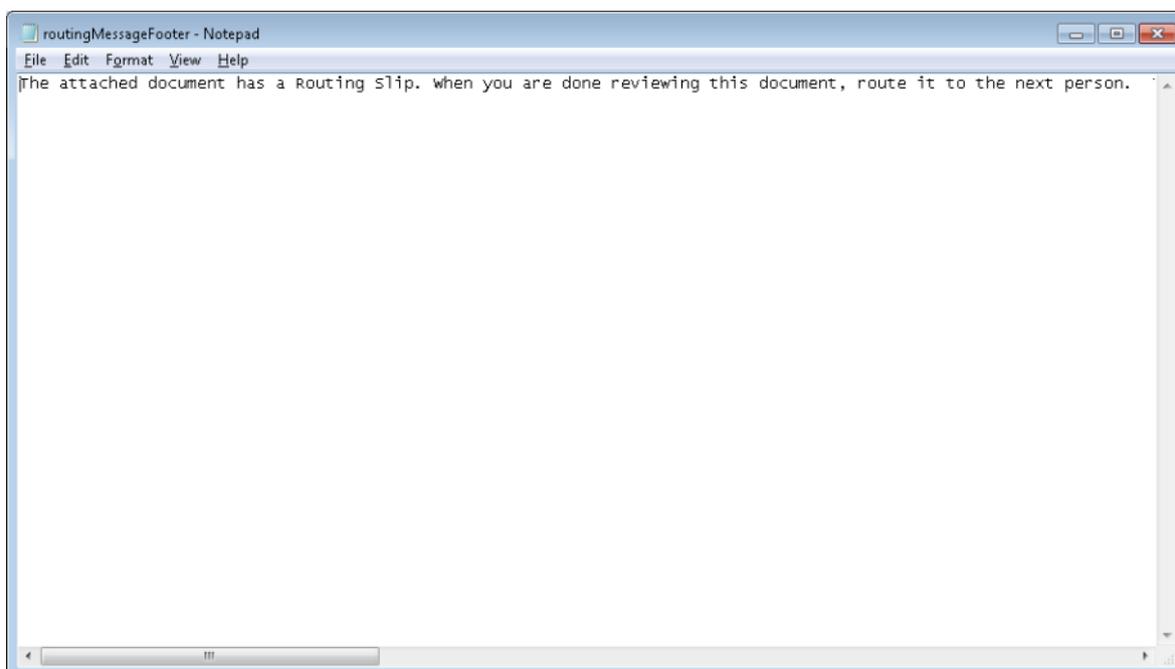
1. To customize a message footer, click on “Configuration” button.  
This option is used to customize the footer section of the emails that get sent out via the routing add-in.



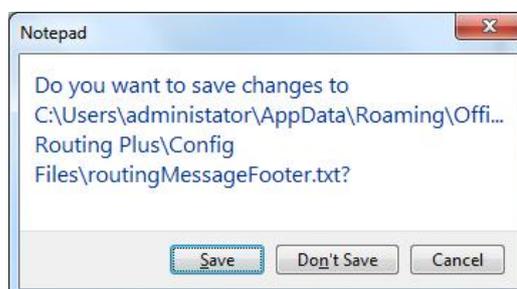
2. Next, click “Customize Message Footer” and click the “Configure it!” button.



3. This will open the file to be edited.



4. Include an appropriate message and close. The program will give you a save option. To save changes, click “Save.”



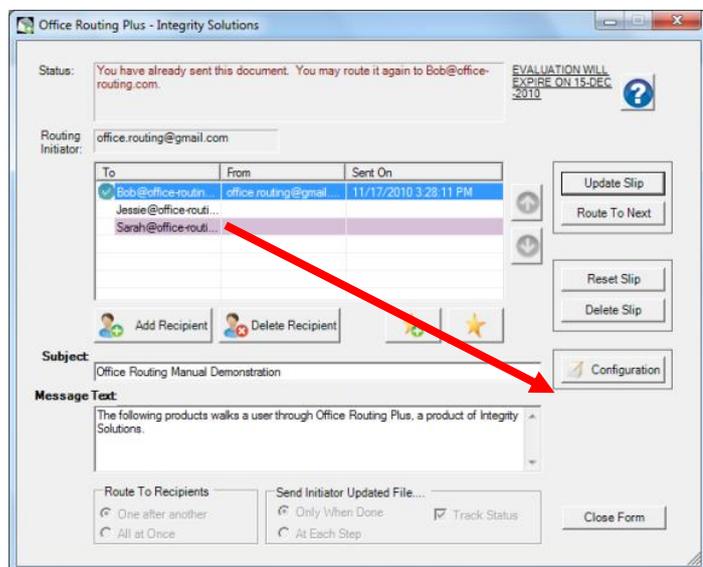
\*Note: The "Return to Initiator" message footer cannot be customized. The message that you are customizing is the one that is sent out on all messages from your computer except the message that gets sent back to the initiator when the routing is complete.

## Set the Temporary File Attachment Path: (This is an advanced setting.)

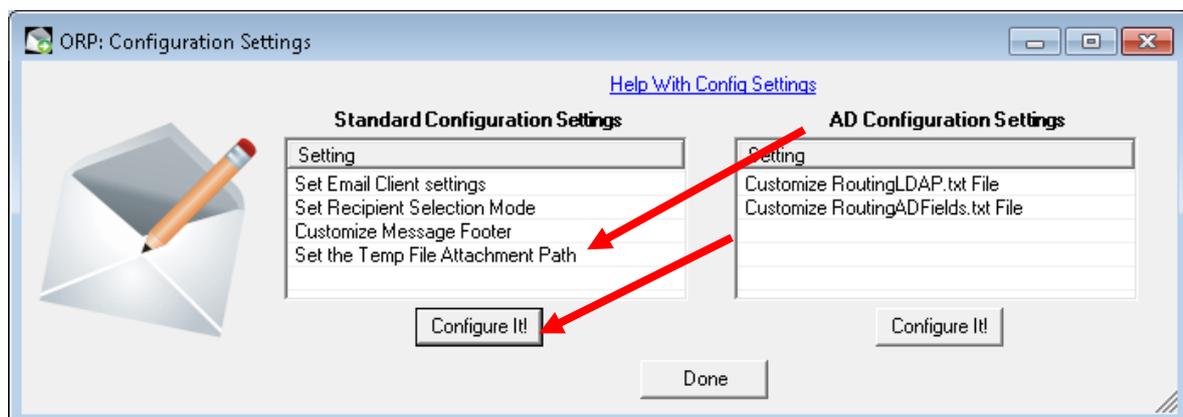
This file is used to customize the folder location to which Office Routing Plus® will temporarily save office documents, which will be routed as attachments. This folder will be created if it does not already exist. After the file is sent, the file will be deleted from this directory.

The file defaults to `\tempRouting\` after a fresh installation. The "\" just means that it will create a subfolder in the path where the user file are located for Office Routing Plus® (by default this is the appData folder). If you want to change the default location (i.e. if your users will not have rights to save to this default location or if you just want this location to be a different drive letter (or unc) for any reason, then you should open this file after the first installation and modify it. Each subsequent installation will require either making the same modification by hand or copying the first configuration file manually (or through automated scripts utilizing group policy or login scripts) to each machine that has the Add-In installed.

1. To set the temporary file attachment path setting, click on the "configuration" button.

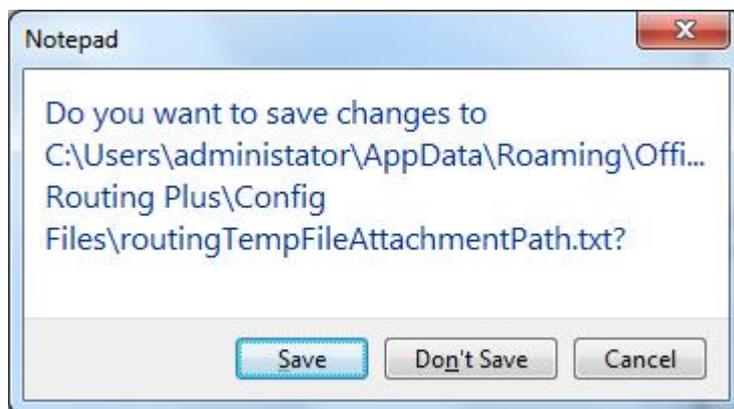
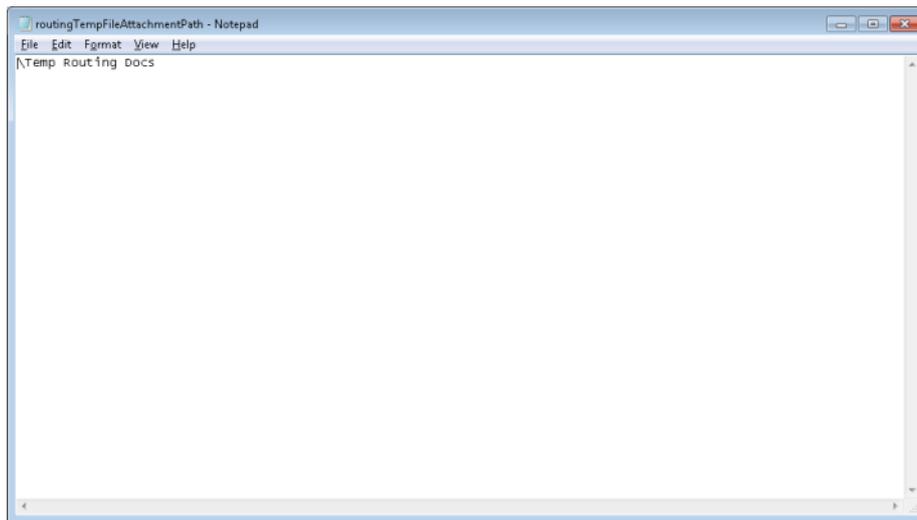


2. Click on Set the Temp File Attachment Path and then click "Configure it!"



3. This will open the file to be edited.

4. Edit the file as necessary and close. The file will bring up a confirmation save box upon closing. To save the changes, click "Save."



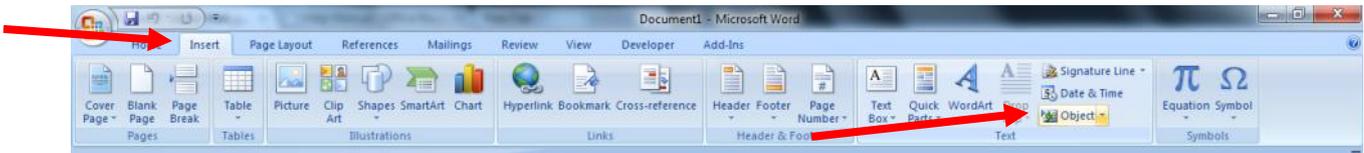
## Appendix 4 Taking Office Routing Plus © to the Next Level

### **Routing Non-Word© /Excel© documents.**

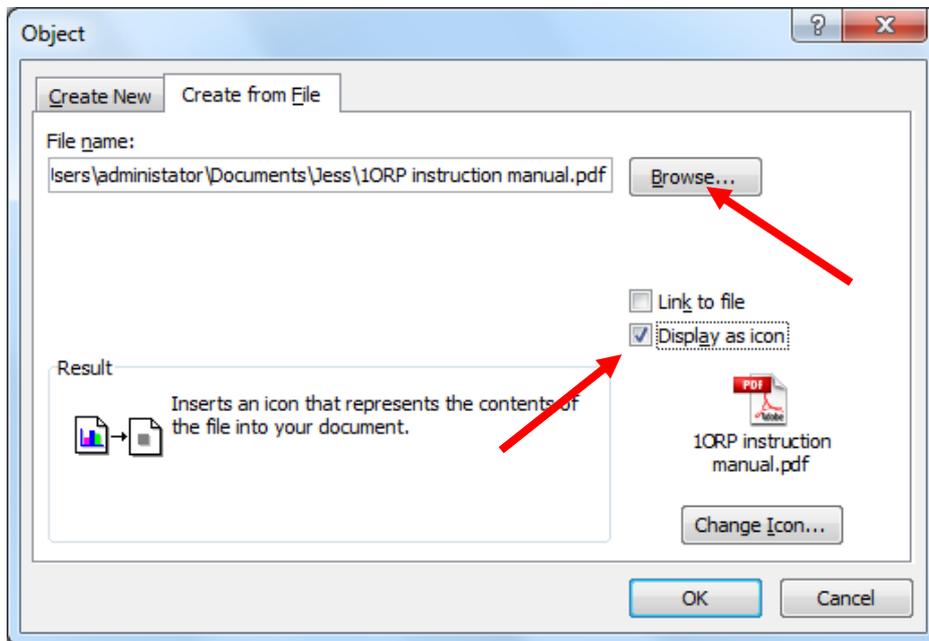
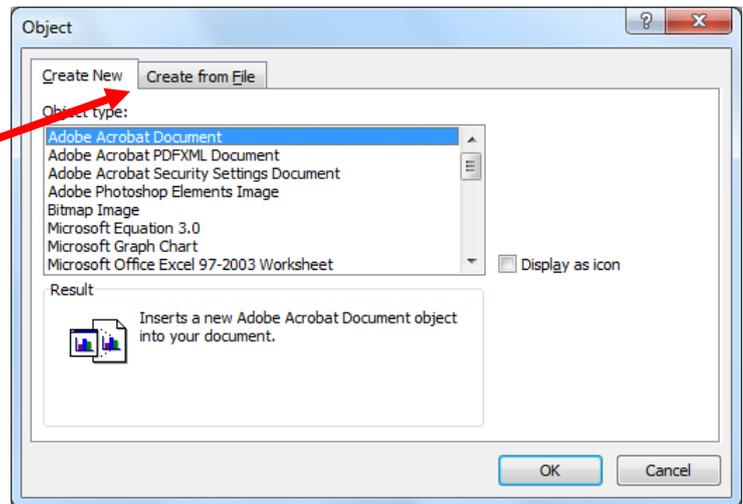
If you want to route documents that are not Excel© or Word© documents (PDF, bmp, tif, etc), you may still do this with Office Routing Plus©.

Microsoft Office© has a feature allowing you to easily embed any type of document within a Word© or Excel© document. Once the document has been embedded into the Word© or Excel© Document, use Office Routing Plus® to route the document as you would any other document. Use the following instructions to embed an alternate file type into a Word© or Excel© document.

1. To embed an alternate file into a Word© or Excel© document click on the “Insert” tab and select “object” from the “Object” dropdown box.

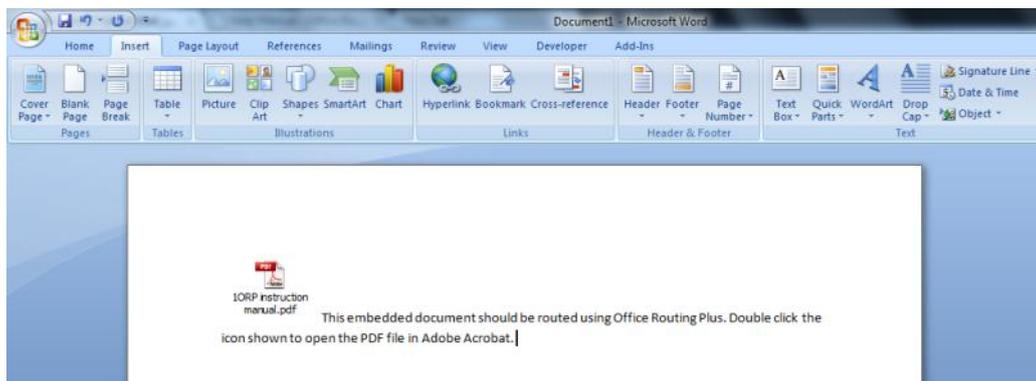


2. Select the “Create from File” tab.

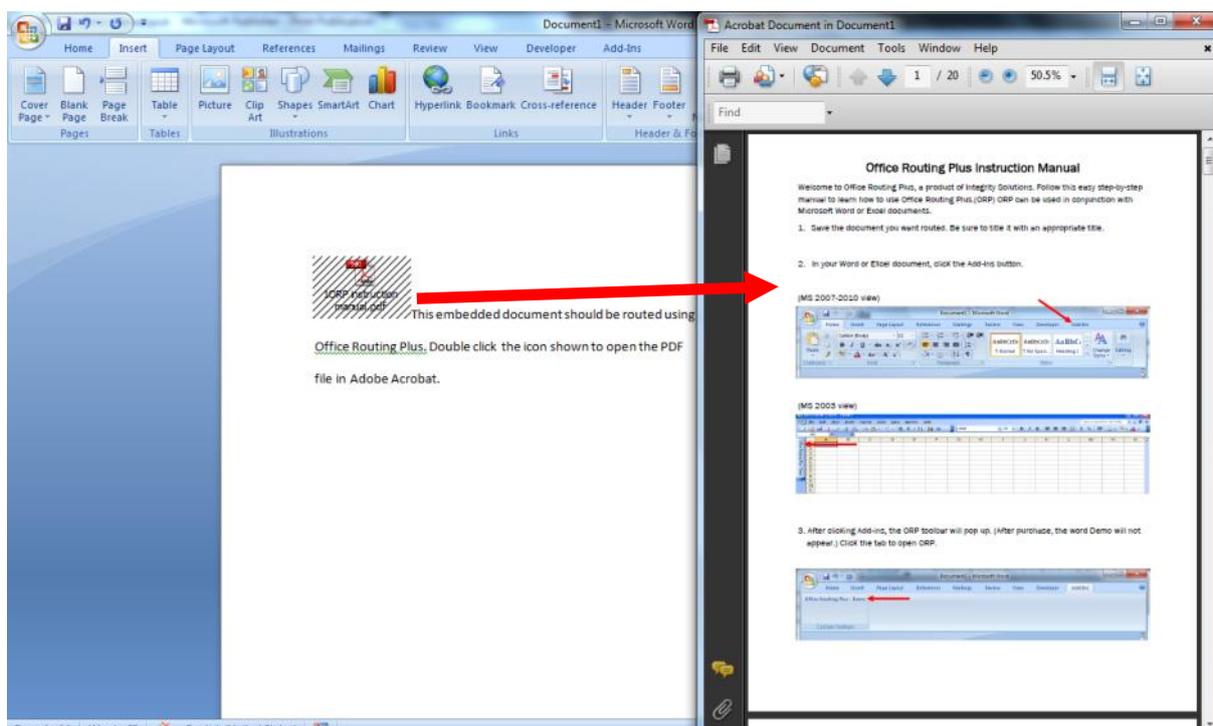


3. Select the “Browse” button and select your file. Any type of document can be selected. (The most widely used files are a PDF, Bitmap, JPG, etc.)
4. Select “Display as Icon”
5. Click OK.

6. Your document should show as an icon as seen below.



7. Double clicking on the icon will open the document. The document will open in whatever default program is associated with the file type. (In the case below, Adobe Acrobat © was used.)



8. Now use Office Routing Plus® to add a routing slip to this PDF (or other document type) and route this document as you would a Word© or Excel© document.

## Programming Office Routing Plus® With VBA

Many organizations may wish to program Office Routing Plus with Visual Basic for Applications (VBA). Office Routing Plus allows for this, if you have purchased the *Office Routing Plus Programming API®*. Email [sales@office-routing.com](mailto:sales@office-routing.com) for pricing and further details.

Below are a few scenarios that show the potential power of the *Office Routing Plus Programming API®*.

1. You have a saved Excel© form that your organization uses for check requests, and you want users in your organization to be able to download this template from your intranet or a network location. You do not want the person making the check request to know which all the recipients of this document because you have a large organization with complex business rules. It would be nice to have managed code inside the document itself that could dynamically determine the routing recipients based on criteria in the document. (i.e. the department the initiator works in, the amount of the request, or the type of request.) You can design the Excel© form so that each of these pieces of information can be clearly determined (i.e. by making named references or ensuring that they are put in specific cell numbers).

A programmer may now write VBA code in the form itself that has logic for looking up the appropriate recipients to route to based on the user's department and the amount/type of check request. This mapping logic could be stored in arrays or simple function in the Excel© document or it could even be tied into Active Directory or a company database. Once a programmer has determined the recipients, he could create a button that the user clicks, which could then easily add these recipients to the document with Office Routing Plus' programmable API. The code would simply pass in the current Excel/Word© document to Office Routing Plus API® and then add the recipients. The document could also be routed with the API.

2. When a form is filled out on your company website, you may want to write special code to take the data from this html web form and automate creating a new Excel© or Word© document (or even a PDF document) with the form's content. Then you can add recipients to this document based on the content of the document and route it to the first person. This could be accomplished by a programmer who knows how to automate creating a Word/Excel© document from managed code written in a language that can interact with COM objects (vb.net, c#, etc). Once program automates the creation of the document and adds the recipients with the Office Routing Plus Programming API, it could route the document to the first recipient with one additional line of code.

If your company is interested in purchasing the *Office Routing Plus Programming API®*, contact Probitas Solutions Inc. at [sales@office-routing.com](mailto:sales@office-routing.com).