

QUICK REFERENCE GUIDE

Routing Slips In Microsoft Outlook 2007

Overview

In our last e-mail system, we used routing slips to request vacation or personal time. The request form was attached to a routing slip and moved from the supervisor to Human Resources and back to the employee to insure that the request was approved in a timely manner.

As part of Outlook 2007, a special **add-in** will allow us to send routing slips from Microsoft Word (and Microsoft Excel). This tool, called Office Routing Plus®, will route a document to anyone whose e-mail address you specify or anyone for whom you have created an Outlook contact.

Using Office Routing Plus

Office Routing Plus is an additional piece of software that will be installed on your PC. Once installed, you will see an additional ribbon tab to the right edge of your Microsoft Word and Excel windows called the **Add-Ins** tab. See the example below.

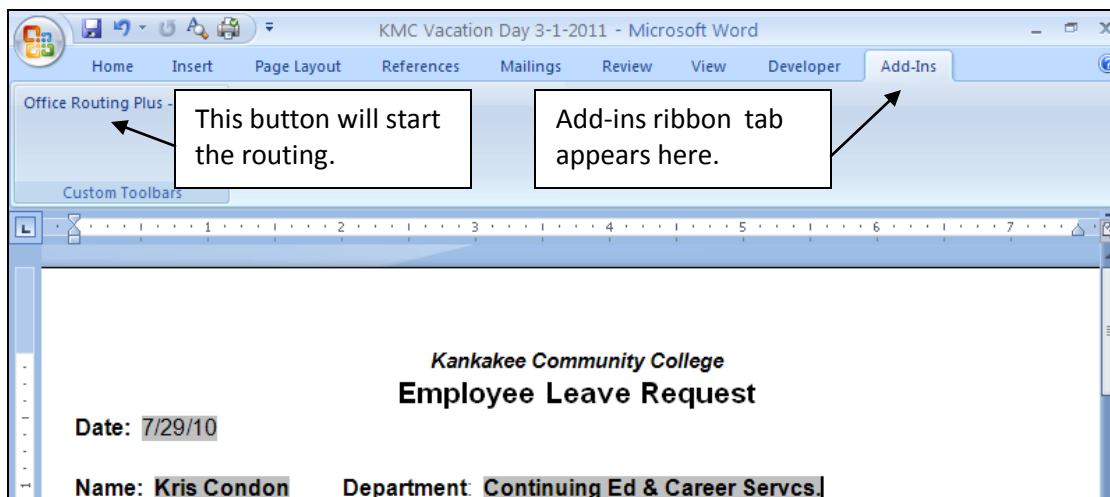


Figure 1: Word Window with Office Routing Plus Installed

Once you begin the routing slip, the Routing Slip Dialog Box will appear on your screen. This will allow you to set up the routing slip; once the routing is completed, the document will automatically be returned to you.

A sample Routing Slip Dialog Box is shown here.

Status: 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.

EVALUATION WILL EXPIRE ON 15-FEB-2011

Routing Initiator:

To	From	Sent On
MPOSING@KCC....		

Add Recipient Delete Recipient

Subject

Message Text

Route To Recipients: ☒ One after another ☐ All at Once

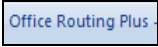
Send Initiator Updated File....: ☒ Only When Done ☐ At Each Step

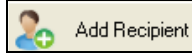
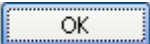




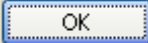
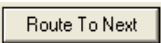

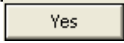
Track Status ☒

Buttons: Add Slip, Route To Next, Reset Slip, Delete Slip, Configuration, Close Form

Figure 2: Routing Slip Dialog Box

Use this procedure to route a vacation or personal time request.

1. Create and save your Word document.
2. From the Word Ribbon Tab, click the **Add-Ins** Tab.
3. From the Add-Ins Tab, click the  button. The Routing Slip Dialog Box appears.
4. Make sure that the **Route to Recipients one after another** radio button is selected.
5. Make sure that the **Send Initiator Updated File Only When Done** radio button is selected so you will receive the fully routed document.

6. Leave the **Track Status** check box selected so you can check the status of your request. You will receive an updated e-mail after each person has received and rerouted your document.
7. To add a recipient for routing, click the  button. You will be prompted to add the recipient from KCC's **Global Address List**. You can also select a name from your Contacts folder.
8. Double-click on each name to whom the document should be routed; then click the  button when you are finished.
9. You will return to the Routing Slip Dialog Box and see the names on the routing list. To remove a recipient, click the  button. To rearrange the order of the routing list, click the  or  buttons.
10. To add the routing slip, click the  button. You will receive a prompt saying, "**Slip information successfully updated.**" Click the  button to continue.
11. Enter a subject in the **Subject** line, and add any needed information in the **Message Text** box.
12. To begin the routing, click the  button. A copy of the routing slip is now in your Sent Items folder and you will be notified that the message has begun its route.
13. When the first recipient receives the routing slip, the attachment should be opened and any changes made.
14. The first recipient clicks the  button when the document is ready to be routed on to the next recipient. The first recipient will then be prompted to route the document on and clicks the  button to continue.
15. When the routing process is complete, you will receive a message in your InBox from the last recipient along with your completed document.

If you have any questions about Microsoft Outlook 2007 or how to use the Office Routing Plus feature, please call the ITS Help Desk at extension 8900.