

Office Routing Plus Help Manual:

Help Resources

- Online version of this [Help Manual](#) (updated 08.11.2009)
- Office Routing Plus [F.A.Q.](#)

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Requirements and Compatibility

- Windows Vista, XP SP2
- Excel 2003 or Excel 2007 (for Excel Add-In)
- Word 2003 or Word 2007 (for Word Add-In)
- Outlook 2003 or 2007 is required on each client that will be running the Add-In. However, if your organization does not use Outlook, Office Routing Plus can be customized to use email relaying.
- Active Directory is utilized by Office Routing Plus for choosing and displaying email recipients.
- Microsoft .NET Framework 2.0 (will be installed if the installer detects it is missing).

Installing the Add-In

- You will be directed to a website to download either an evaluation or live version of the Office Routing Plus® Add-In.

- Open the zip file and extract the contents to a directory (alternatively, while you have the zip file open you should be able to just launch the setup.exe file from within Winzip®).
- Run the setup.exe file.
- If you do not have the Microsoft 2.0 Framework on this machine, then the installation package will download this from Microsoft's website and install it now. Note that this can take 10-15 minutes.
- If you already have the Microsoft 2.0 Framework or if it just got installed in the step above, the Office Routing Plus® Setup Wizard will appear. Click next and you will be prompted for a directory to installation add-in to. The default location is c:\program files\office routing plus\. The Wizard will also ask you if you would like this program to be installed for All Users or "Just Me".
- Click next and then the Wizard will tell you it is ready to install. Click next one last time to install. Installation should be quick.
- After the Add-In installs successfully, follow the instructions below under "[Configuring the Add-In](#)"

Silent or Unattended Installs

- Some organizations that have purchased a large number of Office Routing Plus licenses will want to push out Office Routing Plus to a defined list of computers via Group Policy or SMS and will want to utilize the unattended or silent installation. The setup.exe and the msi file for Office Routing Plus are standard Windows installation files, created with Windows Installer. Therefore, silent or unattended installations should work fine. For more information about Windows Installer/Msi Setup and silent installations, see the Windows Installer/Msi Setup section at the following location:
<http://www.appdeploy.com/articles/commandline.asp>

Installing the Add-In - Questions and Problems

Configuring the Add-In

- The Add-In utilizes four simple text files for configuration purposes:
- routingLD.txt
- routingADFields.txt -- this file will not need to be modified by most organizations.
- routingMessageFooter.txt
- routingTempFileAttachmentPath.txt

RoutingLD.txt

- C:\program files\office routing plus\routingLD.txt (substitute appropriate path if you installed to a different location.)
- The routingLD.txt file is what tells Office Routing Plus® how to connect to your Active Directory domain controller(s) in order to display a complete listing of potential recipients that can be sent to by the routing Add-In.

- Open the routingLD.txt file and add one or multiple LDAP paths to your Active Directory server. Your network administrator should be able to easily tell you what these paths would be. You should supply a LDAP path for each Organizational Unit you want the Add-In to inspect for potential recipients.

Sample configuration of the routingLD.txt file:

```
LDAP://ou=employees,dc=somewhere,dc=com|(&(objectCategory=Person)(objectClass=user)(extensionattribute1=somevalue))
```

```
LDAP://ou=Managers,ou=Groups,dc=somewhere,dc=com
```

Explanation:

In the above sample Ldap paths, the employees Organizational Unit of the somewhere.com domain contains users that you would like the Add-In to be able to route documents to. However, in this Organizational Unit, you have some accounts and objects that you do not want your users to see when they are using the add-in to select recipients to route to. The pipe character (|) is used in this example to separate the ldap path from the ldap filter or query. So on the left side of the pipe character is the ldap path to connect to and on the right side of the pipe is the ldap query or filter. (For more information on [ldap filtering/querying syntax](http://technet.microsoft.com/en-us/library/aa996205(EXCHG.65).aspx), visit [http://technet.microsoft.com/en-us/library/aa996205\(EXCHG.65\).aspx](http://technet.microsoft.com/en-us/library/aa996205(EXCHG.65).aspx))

In addition, the Organizational Unit called Groups contains an Organizational Unit called Managers and we want to make ALL of the objects in this Organizational Unit available to the add-in users. So in this case, we just specify the ldap path and don't bother specifying a filter or query statement since we want it to return everything from this Organizational Unit.

The routingLD.txt file will look exactly like the above sample after a fresh installation. You should open it after the first installation and modify it to the configuration of your organization. Each subsequent installation will require either making the same modification by hand or by 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.

RoutingADFields.txt

- C:\program files\office routing plus\routingADFields.txt (substitute appropriate path if you installed to a different location).
- Every organization we've worked with so far (May 2009) has not had to change this file
- The purpose of this file is simply to name the Active Directory fields in your organization that contains key information about your users for the routing Add-In to utilize. Namely, the Active Directory fields used for display name and the fully qualified email address for each user are to be configured in this file. As noted above, the default file that is provided upon installation typically contains the field names that are used by every organization that utilizes Active Directory so chances are you will not need to modify this file at all. The only reason it exists is to provide more flexibility for the configuration of the add-in, in the hypothetical scenario that an organization is not using the default Active directory fields for display name and mail addresses (see below for an explanation of these fields and the config file).

Sample Configuration (most users will not need to change this file)

mailname=mail

displayname=displayname

Explanation

The mailname attribute simply indicates the name of the Active Directory field that contains your company's fully qualified email address. This seems to be the "mail" field in Active Directory for nearly all companies (if not all). If your company happens to use a different Active Directory field then just change to mailname=<AnotherADField> substituting your company's fully qualified email address field name for <AnotherADField>.

The displayname attribute simply indicates the name of the Active Directory field that contains your company's display name that you want the user's to see when they see the listing of recipients that they can route documents to when they hit the "Add Recipients" button in the Add-In. This seems to be the "displayname" field in Active Directory for nearly all companies (if not all). If your company happens to use a different Active Directory field then just change to displayname=<AnotherADField> substituting your company's display name field for <AnotherADField>.

RoutingMessageFooter.txt

- C:\program files\office routing plus\routingMessageFooter.txt (substitute appropriate path if you installed to a different location).
- The routingMessageFooter.txt file is used to customize the footer section of the emails that get sent out via the routing add-in. Note that 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 except the message that gets sent back to the initiator when the routing is complete.
- The routingMessageFooter.txt file will have the default text for the message footer after a fresh installation. If you want to change the default message, you should open it 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.

routingTempFileAttachmentPath.txt

- C:\program files\office routing plus\routingTempFileAttachmentPath.txt (substitute appropriate path if you installed to a different location).
- The routingTempFileAttachmentPath.txt 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 temporarily created, each time a document gets routed. It will always be deleted right after the document is sent.
- The routingTempFileAttachmentPath.txt file defaults to c:\tempRouting\ after a fresh installation. 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.

Configuring the Add-In - Questions and Problems

Q: My organization uses more than one domain for users. Will this be a problem when it comes to showing the list of available recipients when I hit "Add Recipient" and the Add-In shows the potential recipients? Also, even if the Add-In correctly displays all of my users, when we select one or more and then later choose "route to next" to actually route the document, will Office Routing Plus know what the fully qualified email address is for each user we have selected to route to, considering that some of the recipients might be from one domain and one might be from another.

A: Office Routing Plus handles this scenario rather nicely. To answer the first concern about displaying all of the recipients from both domains when you click "Add Recipients"--the Add-In can show all of the recipients from both domains because it simply looks up and lists all of the recipients from any of the ldap paths you have entered in the routingLD.txt file. Since this file doesn't care if you enter paths to one domain or paths to multiple domains, you will have no problem. The only restriction is that you have to enter ldap paths that each computer in your organization will be able to access at run time. With regard to the second question above--Office Routing Plus will know what the fully qualified name is for each recipient (even if some are from one domain and others from another) by looking at the actual entry in Active Directory for each user and pulling the field you entered in the routingADFields.txt file for the "mailname" attribute.

Q: Do I need to make the changes to these configuration files on every machine!!? If so, why!!?

A: Yes, each machine will need to have these two configuration files setup on each machine. If you have purchased a large volume of Office Routing Plus licenses and you are finding it difficult to manually edit the two configuration files after every installation, then you have a few options. One option would be to configure the two configuration files after the first installation and then copy that file to either a common network drive or a thumb drive. At each of the next installations, simply copy over the default configuration files that got installed with the file you configured after the first installation. The second option would be to work with your network administrator on coming up with a way to deploy the configuration files to all machines that have Office Routing Plus installed via either the login script or Group Policy.

Launching the Add-In

- The Office Routing Plus Add-In is found under the Add-Ins menu in Word or Excel 2007. In 2003, you can find a button for Office Routing Plus on the left, slightly under the File menu.

Launching the Add-In - Questions and Problems

Q: Office Routing Plus does not seem to be loading on one of our computers. I have installed it and even uninstalled and re-installed. Now what?

A: There are a few steps you can take to troubleshoot what may be going on in this situation.

Check the windows registry to see if Excel or Word has disabled this Add-In.

Excel:

HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Office\Excel\AddIns\RoutingSolution_sharedComAddIn.Connect

Word:

HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Office\Word\AddIns\RoutingSolution_sharedComAddIn.Connect

Check the value of the LoadBehavior key. If it is 2, then Word or Excel has disabled the Add-In. Be sure that Excel or Word is closed and try setting this value to 3 and then re-open Word or Excel.

If the above registry edit step did not fix your problem then check to see that the Office 2007 Primary Interops are installed in the Global Assembly Cache (GAC) for an Office 2007 machine. On a 2003 machine check the GAC for the Office 2003 Primary Interops.

Check c:\Windows\Assembly (the GAC) for the following:

Office 2007:

Check for an entry called Policy.11.0.Microsoft.Office.Interop.Excel or Policy.11.0.Microsoft.Office.Interop.Word. If these entries don't exist then this machine is missing the 2007 Primary Interop policy that says to redirect a request to the 2003 API to 2007. Office Routing Plus needs this policy registered in the GAC. Download the 2007 Primary Interop Assemblies (PIA) from Microsoft at:

<http://www.microsoft.com/downloads/details.aspx?FamilyID=59daebaa-bed4-4282-a28c-b864d8bfa513&displaylang=en>

Office 2003:

Check for an entry called Microsoft.Office.Interop.Excel or Microsoft.Office.Interop.Word. The version should be 11.0. If these entries don't exist with a version of 11.0 then this machine is missing the 2003 Primary Interops. Office Routing Plus needs this entry registered in the GAC. Download the 2003 Primary Interop Assemblies (PIA) from Microsoft at:

<http://www.microsoft.com/downloads/details.aspx?FamilyId=3C9A983A-AC14-4125-8BA0-D36D67E0F4AD&displaylang=en>

If you still have problems with the Office Routing Plus Add-In not loading on a machine email

Using the Add-In

- Users will find that Office Routing Plus is very familiar to them if they used the built in Office 2003 routing slip features via the "Send to Routing Recipient" menu. A few common questions are below. If you have any further questions or problems using Office Routing Plus email .

Using the Add-In - Questions and Problems

Q: I'm getting an annoying warning from Outlook saying that another program is trying to access Outlook or the Outlook address book. Also, sometimes it says another program is trying to use Outlook to send an email on my behalf. How can I turn these messages off?

A: This is actually an Outlook security setting controlled in the windows registry. The message is not specific to the Office Routing Plus® Add-In. The fix is below.

Note that the fixes below will update the registry. Be sure to backup your registry first and be sure that you inspect (or have someone else in your IT office) inspect these changes to ensure that these are changes that should be made on your computer.

For Outlook 2003: In the registry, find HKEY/LOCAL MACHINE/SOFTWARE/POLICIES/[MICROSOFT](#)/Security. The key is a DWord value "CheckAdminSettings" and the value you want is 1. If no key exists, create one and set the value.

However, sometimes this doesn't work for some client machines and from what we have been able to gather so far that might be due to how the exchange server itself is setup--see <http://www.slipstick.com/outlook/eseкуп/admin.htm>. But before you get into those complexities, just try the first trick above as that should fix the problem.

For Outlook 2007 - Download and run this registry entry from the Office Routing Plus® website (of course review it and make sure you are ok with the changes and backup your registry before you make the changes. We have had several customers run this and it does make the message go away and does not seem to create other problems).

<http://www.office-routing.com/office-routing/download/SecurityFixForOutlook2007.reg>

Q: How do I add a routing slip to a 2007 Word document with the ORP Add-In?

A: Launch the ORP Add-In from within Word and click the "Add Recipients" button. After you have added the recipients to route to, click the "Add Slip" button. To route to the first recipient simply click the "Route to Next" button.

Q: How do I add a routing slip to a 2007 Excel document with the ORP Add-In?

A: Launch the ORP Add-In from within Excel and click the "Add Recipients" button. After you have added the recipients to route to, click the "Add Slip" button. To route to the first recipient simply click the "Route to Next" button.

Q: Where will the ORP Add-In show in Word or Excel?

A: In 2007, you will find ORP under the Add-Ins menu. In 2003 you will find a button for ORP on the left, slightly under the File menu.

Q: How will the ORP Add-In know which users email addresses from my organization to show as potential recipients?

A: Through connecting to your Active Directory schema. Learn more about [working with Active Directory](#).

Q: Does the ORP Add-In retain the "Return When Done" feature so that the routing initiator of the Word or Excel slip will receive the final version of the document as well as an email notifying him/her that the routing slip has completed?

A: Yes, the "Return When Done" feature has been retained in the ORP Add-In. See all the [Features of Office Routing Plus](#).

Q: Does the ORP Add-In retain the "Track Status" feature so that the routing initiator of the Word or Excel slip will receive an email as each recipient in the routing tree sends to the next recipient?

A: Yes, this feature has been retained in the ORP Add-In. See all the [Features of Office Routing Plus](#) here.

Q: Why does the ORP Add-In show in Outlook?

A: The ORP Add-In may show in Outlook if you have purchased ORP for MS Word and if you use MS Word as your email editor for Outlook and if you are still using Office 2003. The ORP Add-In has been programmed so that you cannot actually launch it from Outlook-although the button may show.

Request an [Evaluation copy](#)