Software Product Description

DESCRIPTION

TeamLinks Routing for Macintosh®, a member of the family of TeamRoute clients, addresses the need of routing forms and information to predetermined destinations within an organization, and collecting approvals from various individuals within the organization. This routing facility allows users to design package routing templates, thereby automating many business workflow processes. As a member of the family of TeamRoute clients, it supports the routing of packages of information among these TeamRoute clients.

TeamLinks Routing for Macintosh can transfer documents, files, and forms to one or more users, giving them the opportunity to review all of the elements as well as electronically "sign" the package of information before passing it on to the next recipient. Since the routing of information is controlled electronically, TeamLinks Routing offers the added benefit of tracking, whereby the initiator and any other authorized recipient can easily determine where the package of information is in the approval cycle.

Features

Routing Packages

These contain an ordered list of attachments and the name of an application to be run as a normal part of processing this package. Usually, one of the first components or attachments is a document or form which indicates the reason for routing the package (e.g., information requests, action item tracking, system problem reporting and tracking, travel authorization requests, and office equipment orders). The initiator may stipulate an ordered routing list and actions/roles to be taken by each recipient (e.g., reviewer, approver) of a routing package. Consequently, the routing package also contains a definition of each assigned role, signatures applied by previous recipients once the routing process has started, and a history of the previous steps the routing package has undergone including the current location and status of the package.

Initiating a Package

A routing package is created by opening a template, filling in the appropriate fields of the form, defining a routing list with associated roles, and adding other documents as attachments, if appropriate. The package is then ready to be routed, serially, to the ordered list of reviewers. Each routing package has a master copy that remains in one location, while copies are distributed to the recipients.

Processing the Package

Based on the recipient's assigned role and associated rights, the recipient of a routing package reviews any of the components of the routing package that have been included in the recipient copy, including attachments and signatures applied in previous steps during the routing process. Based on information in the recipient copy, the recipient may make a number of changes, such as adding attachments and applying a signature to the package. The recipient then routes the package on to the next recipient. If rights are granted to the recipient, the recipient may request a tracking report on the package at any time.

Signatures

A signature is a password protected function that indicates the identity of the person applying the signature, the type of signature (i.e., approval, disapproval, or acknowledgment of the package), and the information that the signature is bound to (this may be Form Fields or nonrevisable attachments). The reviewer's name, the date and time, and remarks are added to the routing package. The signature is generated and certified by the TeamRoute server/agent based on update packages received from the recipient applying the signature. Consequently, if information/data being signed is modified, the signature will no longer match the data and the signature will be invalidated.

Routing and Electronic Messaging

Documents created with TeamLinks Routing, including templates, original routing packages (i.e., Masters), recipient copies, and service messages are stored in the TeamLinks Mail file cabinet (either local or remote drawers, except for Masters which may only be in remote drawers). The TeamLinks Mail file cabinet window is the mechanism used for navigating to and opening TeamLinks Routing documents. Recipients see incoming packages as objects in their inbox, which are accessed through the TeamLinks Mail file cabinet window. When the recipient of a document selects it for review, Routing is invoked (rather than invoking mail) to process the message. As is the case with mail documents, routing documents can be filed in another folder or deleted.

Template Creation

TeamLinks Routing provides a template design function which allows a user to create a new template and make it available to end users. Templates may be mailed among users. End users can take a generic template developed for general use and customize it for their own use (e.g., defining new roles and fields, adding a user-specific routing list, adding the user's name and ID number in the appropriate fields) and save it as a personalized template.

Third-Party Forms Products

In addition to providing support for the TeamForm application, TeamLinks Routing works with applications produced from the third-party forms packages JetForm® and PerFORM PRO®.

Document Management

Documents may be attached to a routing package from the Macintosh file system or from the TeamLinks Mail file cabinet. Attachments can be extracted from the routing package to the Macintosh file system. (The ALL–IN–1 Integrated Office System (IOS) file cabinet is an extension of the Macintosh file system.) Document viewing, editing, and printing operations are provided by the appropriate applications. The TeamLinks viewer, provided with TeamLinks Mail, supports viewing of text files and WPS–PLUS documents.

With the Apple® Macintosh Easy Open Software and with optional converters or viewers that are Easy Open-compliant, TeamLinks allows a user to view and edit documents or attachments which were created by applications not present on the TeamLinks user's desktop.

Help

The major portion of documentation for TeamLinks Routing for Macintosh is provided through its extensive Help facility, which can be invoked via the Help menu or by clicking on Help buttons available with various screens.

Client Installation

This product is installed using the Apple Installer and is done via diskette distribution.

System Management/Administration

The client software for TeamLinks Routing requires no system management. A system manager or administrator is required to manage the OpenVMS system with TeamRoute installed. Please refer to the TeamRoute Server software product for details.

TeamLinks for Macintosh Product Family

TeamLinks Mail for Macintosh Client

TeamLinks Mail for Macintosh (SPD 39.62.xx) provides a choice of X.400 mail service or ALL–IN–1 IOS mail service and distributed file cabinet functionality. It contains the option to connect to the ALL–IN–1 IOS file cabinet.

TeamLinks Routing for Macintosh Client

TeamLinks Routing for Macintosh (detailed in this SPD) provides workflow and requires TeamLinks Mail for Macintosh as a prerequisite.

TeamLinks Office for Macintosh Client

TeamLinks Office for Macintosh (SPD 48.17.xx) includes TeamLinks Mail, Routing, and Electronic Conferencing, which makes it possible to share information across a work group or entire organization.

HARDWARE REQUIREMENTS

Processors Supported

Any Macintosh computer with a hard disk

Other Hardware Required

- Minimum of 900 KB system memory must be allocated for TeamLinks Routing

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Note

This is in addition to the memory used by the system software and any other applications that may be running.

- One 3.5-inch single density (800 KB) disk drive
- 40 MB hard disk

DISK SPACE REQUIREMENTS

- Minimum disk space required for installation is 2.6 MB
- Minimum disk space for use is 1.5 MB

These counts refer to the disk space required on the system disk. The sizes are approximate; actual sizes may vary depending on the user's system environment, configuration, and software options.

SOFTWARE REQUIREMENTS

For the Macintosh Client:

- Macintosh Operating System V7.0, V7.1
- TeamLinks Mail for Macintosh V2.0, V2.1

For the Server:

When using DEC MAILworks as the mail server:

- OpenVMS VAX Operating System V5.5, V5.5-2, V6.0
- DEC MAILworks Server for OpenVMS V1.2
- TeamRoute for OpenVMS V1.0

When using ALL–IN–1 IOS as the mail server:

- OpenVMS VAX Operating System V5.5-2, V6.0, V6.1

- ALL–IN–1 IOS Server for OpenVMS VAX V3.0

- ALL–IN–1 IOS Mandatory Update Patch A (MUPA-V3.0A)

- ALL–IN–1 IOS TeamLinks Connection V2.1 for Open VMS VAX V3.0A

- TeamRoute for ALL–IN–1 V1.2

GROWTH CONSIDERATIONS

The minimum hardware/software requirements for any future version of this product may be different from the requirements for the current version.

DISTRIBUTION MEDIA

RX24 3.5-inch single density (800 KB) hard-shell diskettes

ORDERING INFORMATION

Software license, media, and documentation are combined in a single package. Packages of licenses are also available separately.

Client Package: QB-0VMAA-SA
Client License: QM-0VMAA-AA

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