

How to Open Your SmartWay Tool

The following instructions will help you open and save your SmartWay tool.

When you first open the Shipper Tool you may see a new "Protected View" security warning from Microsoft:

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NOTE – THE SMARTWAY TOOL IS IN THE SAME FORMAT AS PRIOR YEARS AND IS SAFE TO OPEN ON YOUR COMPUTER. FOLLOW THESE STEPS TO PROCEED.

- 1) Select the "Click for more details" link at the end of the message in the menu bar shown above.
- 2) In the Microsoft Office File menu, choose the large "Edit Anyway" button located on the left next to the Protected View information section as shown below.

Save Save As Open		ion about 2016-09-21_shipper - Copy e.bkm\SmartWay\Shipper\2016\2016-09-21_shipper - Copy.xls		
Close	Edit Anyway	Protected View Office has detected a problem with this file. Editing it may be dangerous. To help keep your computer safe this file has been opened in Protected View. You should only enable editing if you trust the contents of the file. Protected View Settings		
		Learn more about Protected View	Properties *	
lew			Size	12.9MB
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Next, the following instructions should appear on your screen *if* you need to change additional security settings before running the Tool. The instructions differ depending upon what version of Excel you use (Excel 2003, 2007, 2010, or 2013).



Security Settings for Excel 2003 Users

To use the Shipper Tool in Microsoft Excel 2003, you will need to have your security levels set to "Medium."

Setting Security Levels to Medium in Excel 2003

- **1.** When using Excel 2003, on the menu bar, go \rightarrow Macro \rightarrow Security Level.
- 2. When the "Security" window opens, select "Medium" level, and select **OK**.



Figure 1: Macro Setting Tabs in Excel 2003

Running the Tool in Microsoft Excel 2003

- 1. Save the Tool to your computer in a folder on your hard drive.
- 2. Go to that folder and double-click on the file to open the Tool.
- 3. You will see a security-warning box appear (**Figure 3**). Select the **Enable Macros** button in the security-warning box.

Security Warning	×
"S:\SmartWay\Shipper.xls" contains macros.	
Macros may contain viruses. It is usually safe to disable macros, but if the macros are legitimate, you might lose same functionality.	
Disable Macros	

Figure 3: Screen showing "Enable Macros" button

The **Welcome** Screen for the Shipper Tool should then appear and you will be ready to begin working on your tool.

Security Settings for Excel 2007 Users

The default settings for Excel 2007 should enable you to run the Tool without any changes.

Running the Tool in Microsoft Excel 2007

- 1) Save the Tool to your computer.
- 2) Open the file, and select the Options... button that appears after the Security Warning just below the menu bar (Figure 4). Detailed instructions are also provided on the screen itself.

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😧 Security Warning Same active content has been disacter. Options	×
A1 • 6 Security Settings for the Tool	*
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Security Settings for the Tool (Pour des instructions en français, faites défilier vers la droite>)	Π
In order to run this application, you must have macros enabled.	
3 noder to full ans application, you must have macros enabled.	
4 For Excel 2007, Excel 2010, and Excel 2013 Users: (If you are using Excel 2003, please scroll down.)	
If an "Options" button appears in the menu bar above, follow these instructions:	
Click the Options button. This button appears after the Security Warning in the Excel 2007 menu bar. Zenable content. In the Microsoft Office Security Options dialog box, choose "Enable this content" and click OK.	
5 Z. Enable content. In the Microsoft Unice Security Options dialog box, choose Enable this content: and cick OK.	
If the "Options" button does not appear, use the instructions below. [NOTE : If you do not have a round Office button (as	
shown in the picture below), you are probably using an earlier version of Excel, in which case you need to scroll to the indexide for Every 10000 used.	1
instructions for Excel 2003 users.] 1. Click the Office button. This button appears in the top left corner of the screen in Excel 2007/2010.	
2 Go to Excel Options. Click the "Excel Options" button in the bottom right corner of the pull-down menu.	
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3. Go to the Trust Center. On the Excel Options screen, click on Trust Center in the left navigation bar.	
4. Go to the Trust Center Settings. Click on Trust Center Settings in the bottom right portion of the screen.	
 Change security settings. Choose the setting "Disable all macros with notification" and click OK. Reopen the file. Close the Excel file and then re-open it. 	
8	
9	
For Excel 2003 Users:	
10 Security Settings / 27	

Figure 4: Security Warning Screen

3) In the **Microsoft Office Security Options** dialog box (**Figure 5**), choose "Enable this content" and select **OK**.



Figure 5: Security Options Dialogue Box

The **Welcome** Screen for the Shipper Tool should then appear and you will be ready to begin working on your tool.

If you reach this point and the Tool does NOT open, you may have your security set too high.



To adjust your security settings, select the button (in the top left corner of the screen) and then select

the Excel Options button in the bottom right corner of the pull-down menu (Figure 6).



Figure 6: Excel Options Drop-Down Menu

On the Excel Options screen, select Trust Center in the left navigation bar (Figure 7):

Excel Options	
Popular Formulas	Change the most popular options in Excel.
Proofing Save Advance Custom Advans Trust Center Resources	Top options for working with Excel i Toolbar on selection ① e Preview ② eloper tab in the Ribbon ③ c CeartPr Color scheme: Blue ♥ ScreenTip style: Show feature descriptions in ScreenTips ♥ Create lists for use in sorts and fill sequences: Edit Custom Lists When creating new workbooks Use this fongt: Body Font Font size: Include this many gheets: 3 ♥ Personalize your copy of Microsoft Office Use the languages you want to use with Microsoft Office: Language Settings
	OK Cancel

Figure 7: Excel Options Drop-Down Menu

When the Trust Center options display opens, select **Trust Center Settings** in the bottom right portion of the screen (**Figure 8**):



Figure 8: Trust Center Settings Screen

Choose the setting "Disable all macros with notification" (Figure 9) and select OK.



Figure 9: Macro Settings Screen

Then run the Tool.

If, at this point, the Tool does not open, review the "Software and Hardware Requirements" on page 8. If you after reviewing this section, you cannot determine how to correct the problem, contact your SmartWay Partner Account Manager.

Security Settings for Excel 2010 and newer Users

The default settings for Excel 2010 and newer Excel versions should enable you to run the tool without any changes. To run the tool:

- 1) Save the tool to your computer.
- 2) Open the file. Depending on your Office settings, you may receive an "Enable Editing" popup. If you do, simply select the Enable Editing button. This will allow you to enter data into the tool. You may only receive this popup the very first time you open the tool.

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			Figure 10	: The Enab	le Editing	Button			
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In order to run	this annlication	n vou muet have		1: Security	Warning	Popup			

If you reach this point and the Tool does NOT open, you may have your security set too high.

To adjust your security settings, select the File ta	ab from the menu bar File Home (in the top left corner
of the screen) and then select the	button in the bottom left-hand menu of the tab (Figure
12).	

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File Home	Insert Page Layout Formulas Data Review View Dev	reloper 🔊 🗆 🖓 🗆 🖓 ک
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🚰 Open	To browse for a file, click Open.	
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New	Select the "Options"	
Print	button	
Save & Send		
Help		
Dptions		
🔀 Exit		

Figure 12: Excel 2010 and Newer Options Drop-Down Menu

On the Excel Options screen, select **Trust Center** in the left navigation bar (Figure 13):

	Excel Options					
	Popular Formulas Proofing Save Advanced Stow Enable Live Preview O Show generation on selection on control on the Ribbon o	⊙ ations in ScreenTips				
Select "Trust Center"	Personalize your copy of Microsoft Offic	View 🗸				

Figure 13: Excel 2010 and Newer Options Drop-Down Menu

When the Trust Center options display opens, select **Trust Center Settings** in the bottom right portion of the screen (**Figure14**):



Figure 14: Trust Center Settings Screen

Choose the setting "Disable all macros with notification" (Figure 15) and select OK.

Trust Center		?×
Trust Center Trusted Publishers Trusted Locations Add-ins ActiveX Settings Macro Settings Message Bar External Content Privacy Options	Macro Settings For macros in documents not in a trusted location: Disable all macros withud notification © Disable all macros withud initiation © Disable all macros except digitally signed macros © Enable all macros (not recommended; potentially dangerous cod Developer Macro Settings □ Trust access to the VBA project object model	
	ΟΚ	Cancel

Figure 15: Macro Settings Screen