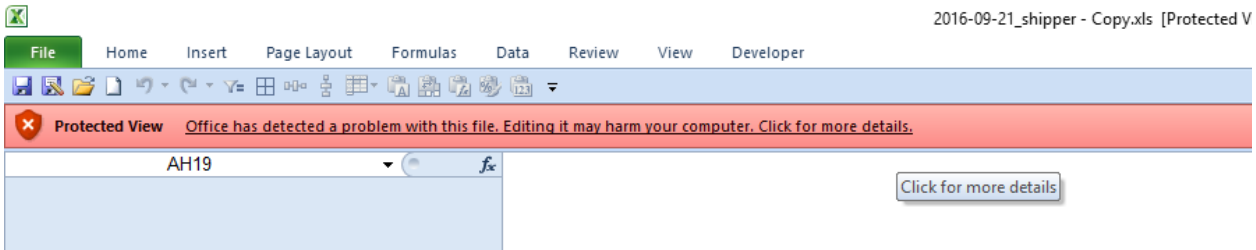


How to Open Your SmartWay Tool

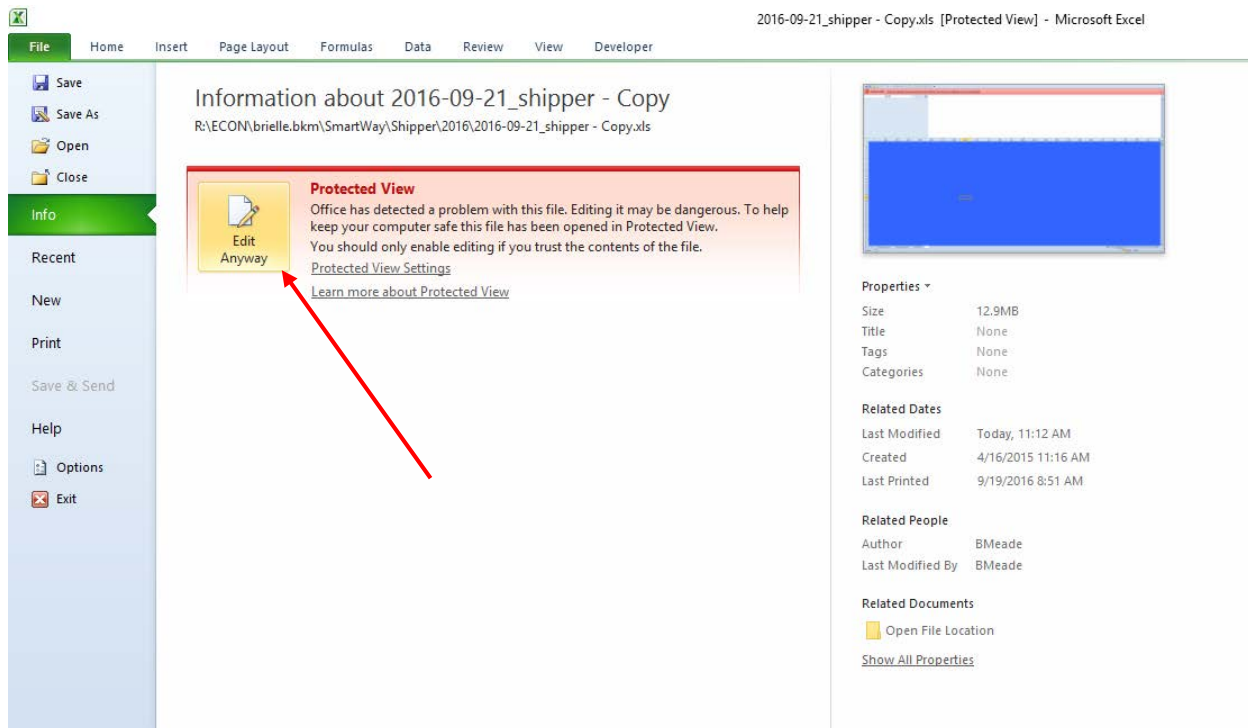
The following instructions will help you open and save your SmartWay tool.

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

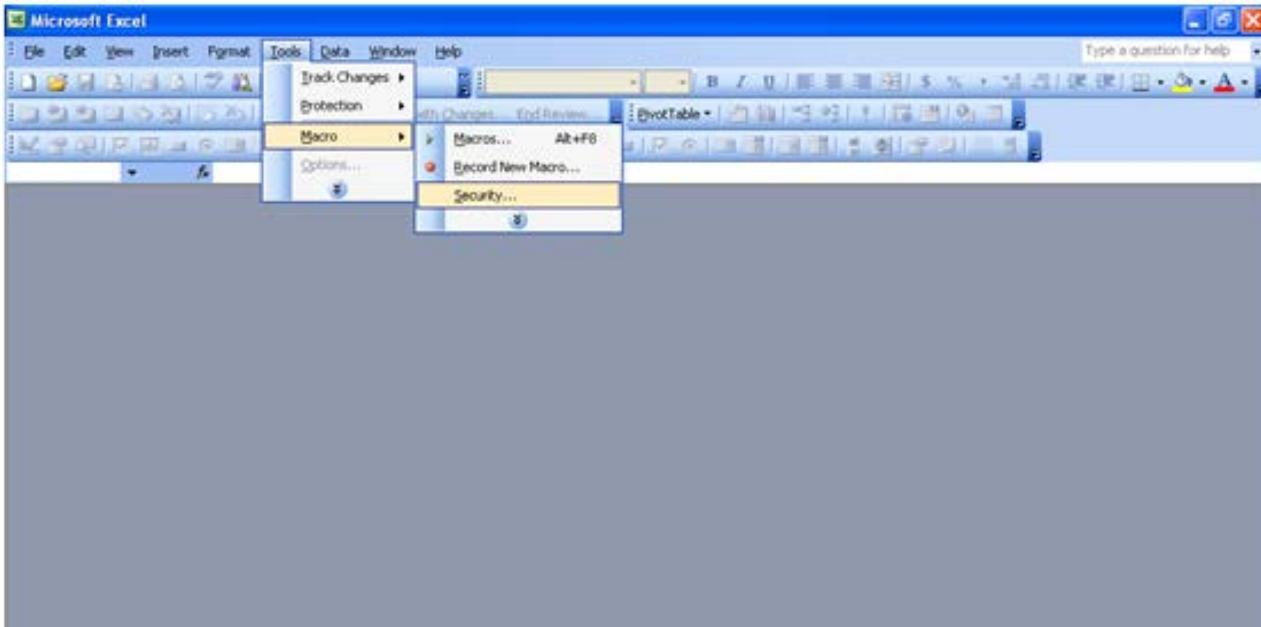


NOTE – THE SMARTWAY TOOL IS IN THE SAME FORMAT AS PRIOR YEARS AND IS SAFE TO OPEN ON YOUR COMPUTER. FOLLOW THESE STEPS TO PROCEED.

- 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.



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).

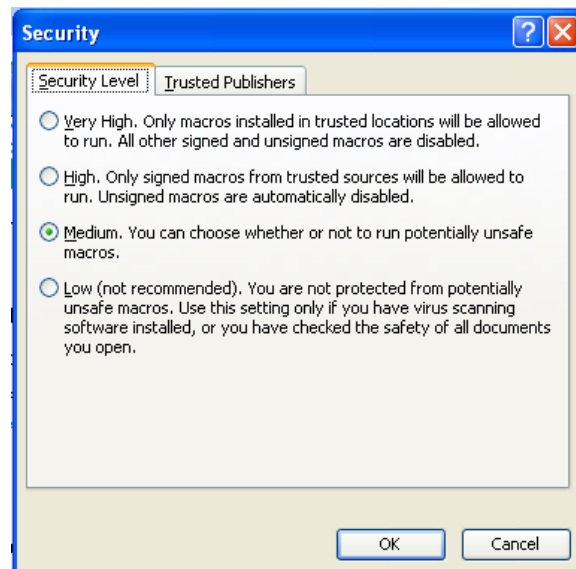


Security Settings for Excel 2003 Users

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 → *Macro* → *Security Level*.
2. When the “Security” window opens, select “Medium” level, and select **OK**.




to *Tools*

the

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  button in the security-warning box.

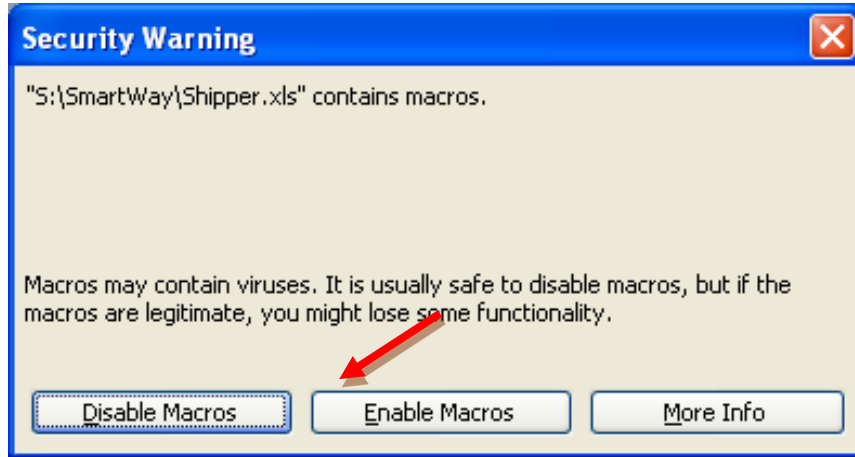


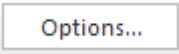
Figure 3: Screen showing “Enable Macros” button

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  button that appears after the Security Warning just below the menu bar (**Figure 4**). Detailed instructions are also provided on the screen itself.

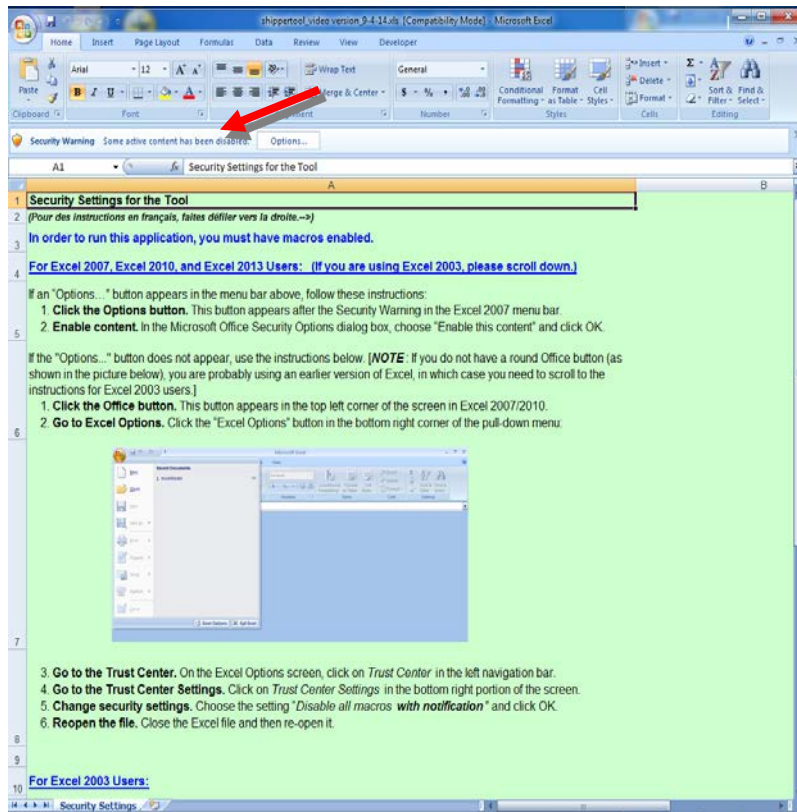


Figure 4: Security Warning Screen

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

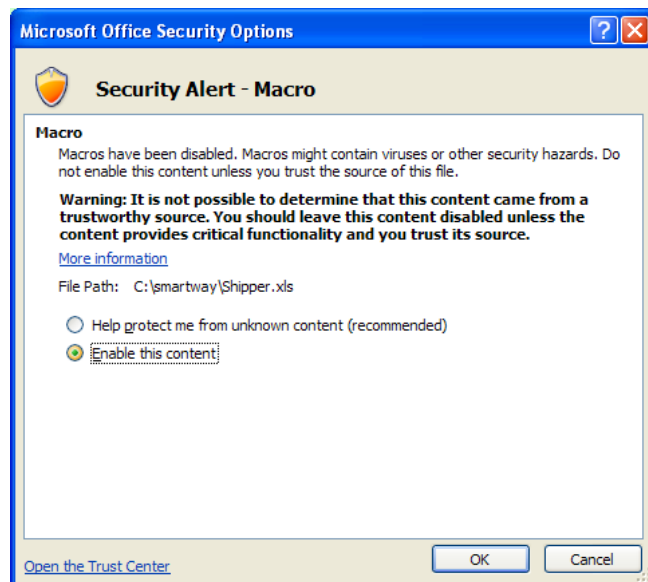




Figure 5: Security Options Dialogue Box

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**).

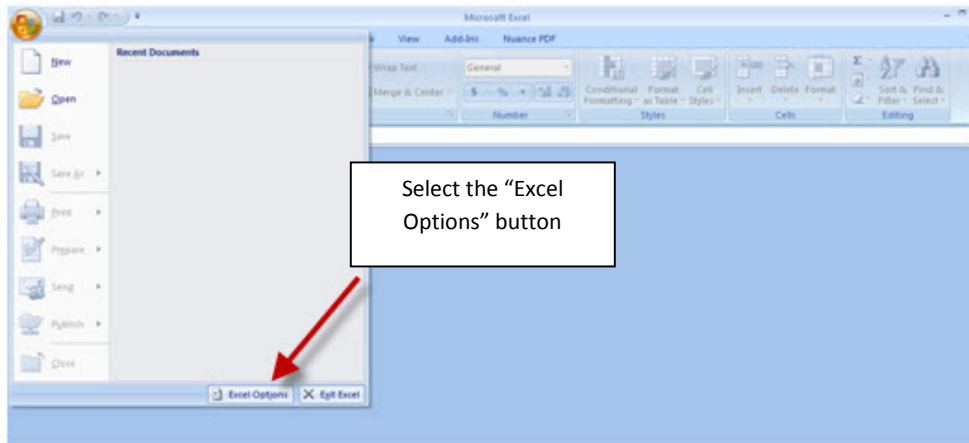


Figure 6: Excel Options Drop-Down Menu

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

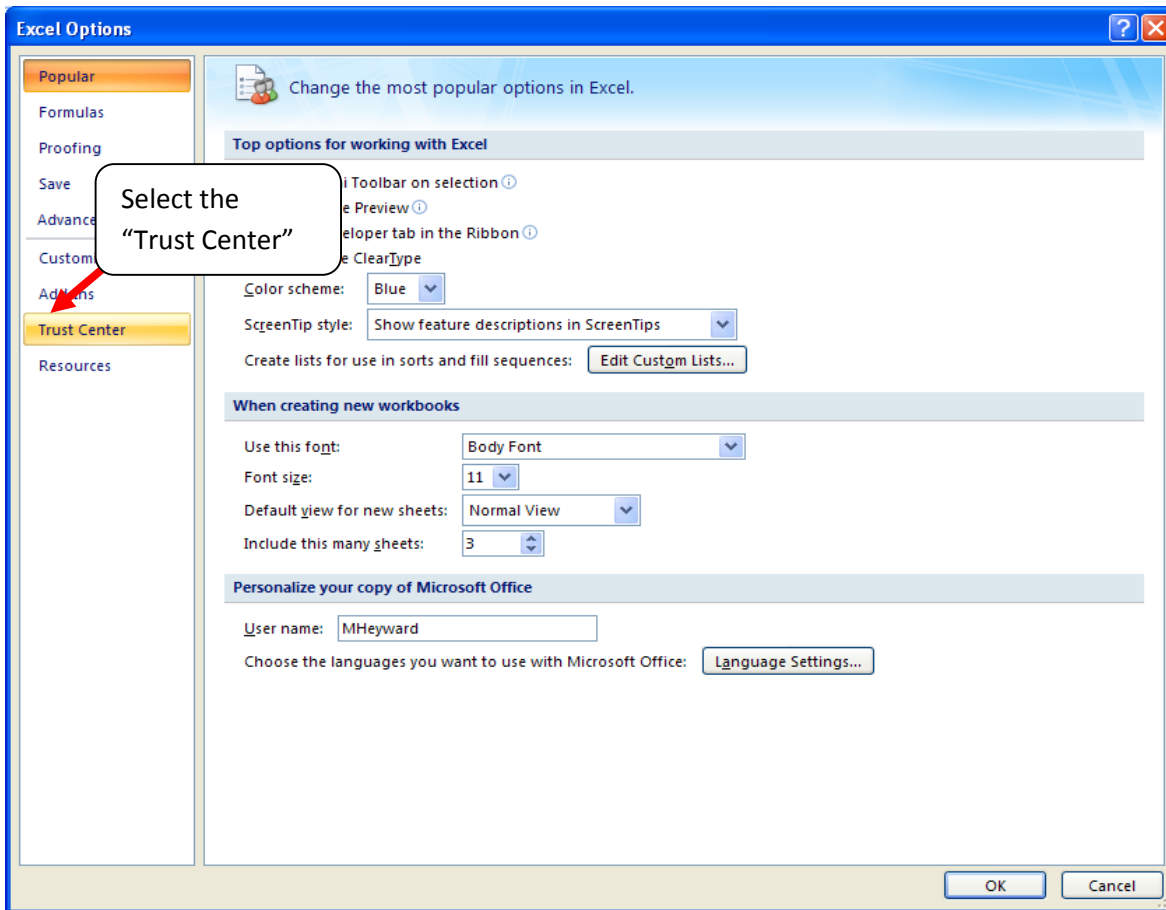


Figure 7: Excel Options Drop-Down Menu

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

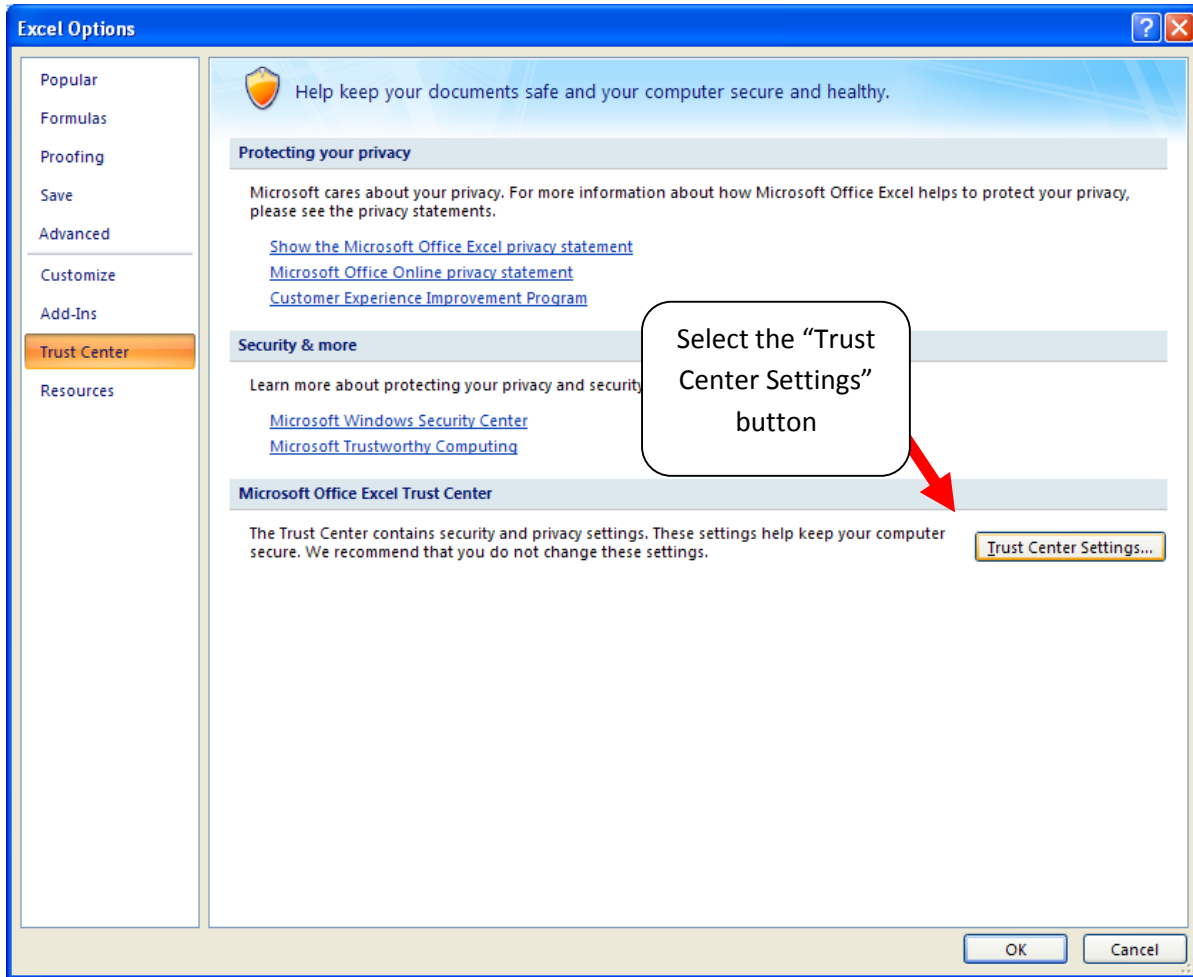


Figure 8: Trust Center Settings Screen

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

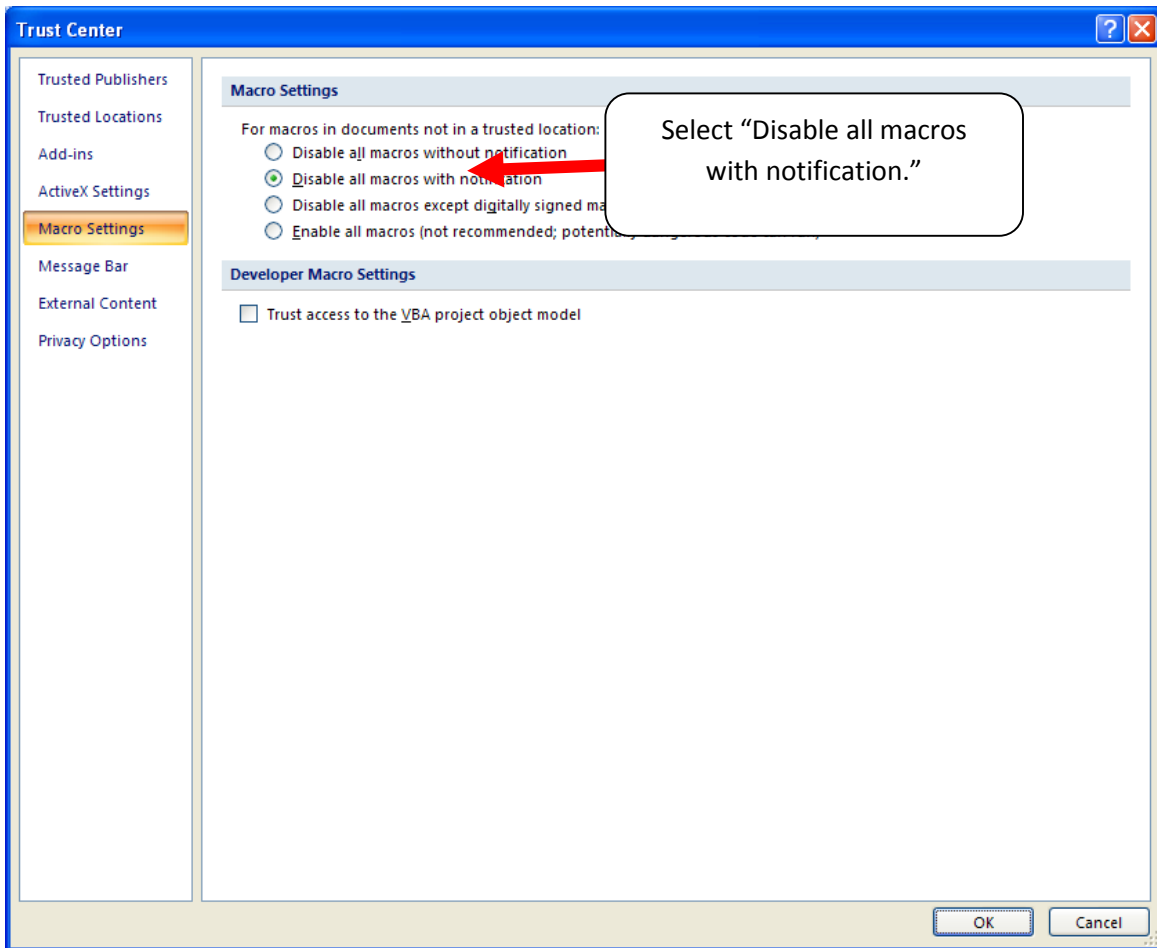


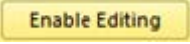
Figure 9: Macro Settings Screen

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  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.

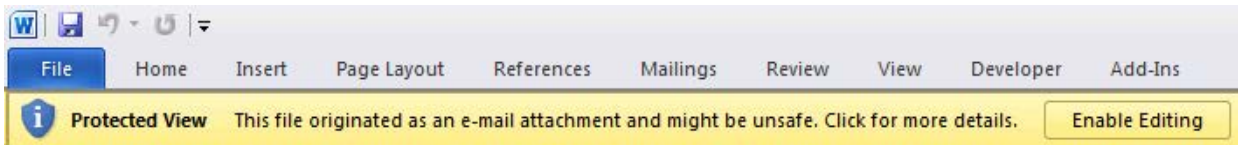

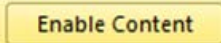


Figure 10: The Enable Editing Button

- 3) Depending on your Excel macro security settings, you may receive a  popup. If you do, simply select the  button. This will enable macros in the tool you just opened.

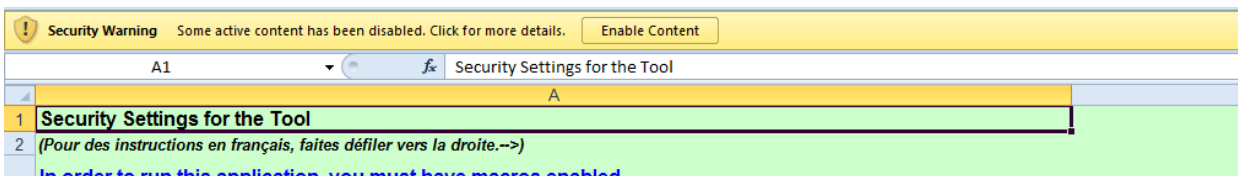


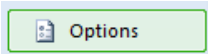


Figure 11: Security Warning Popup

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 tab from the menu bar   (in the top left corner of the screen) and then select the  button in the bottom left-hand menu of the tab (**Figure 12**).

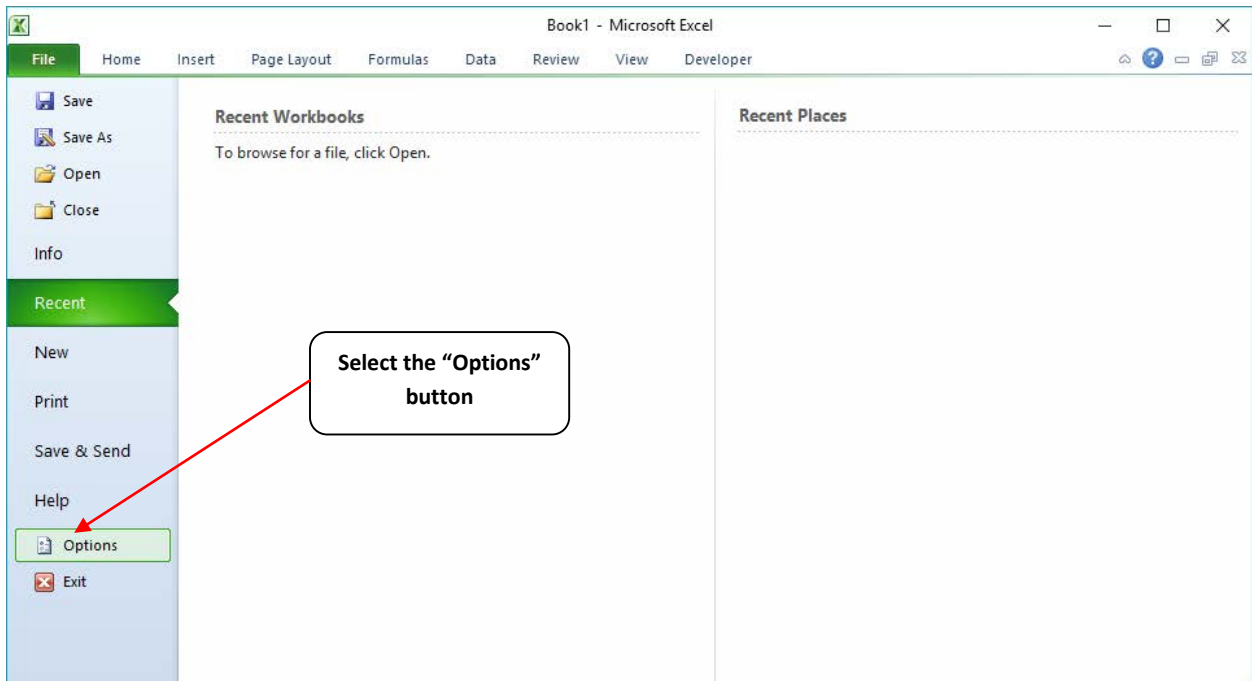


Figure 12: Excel 2010 and Newer Options Drop-Down Menu

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

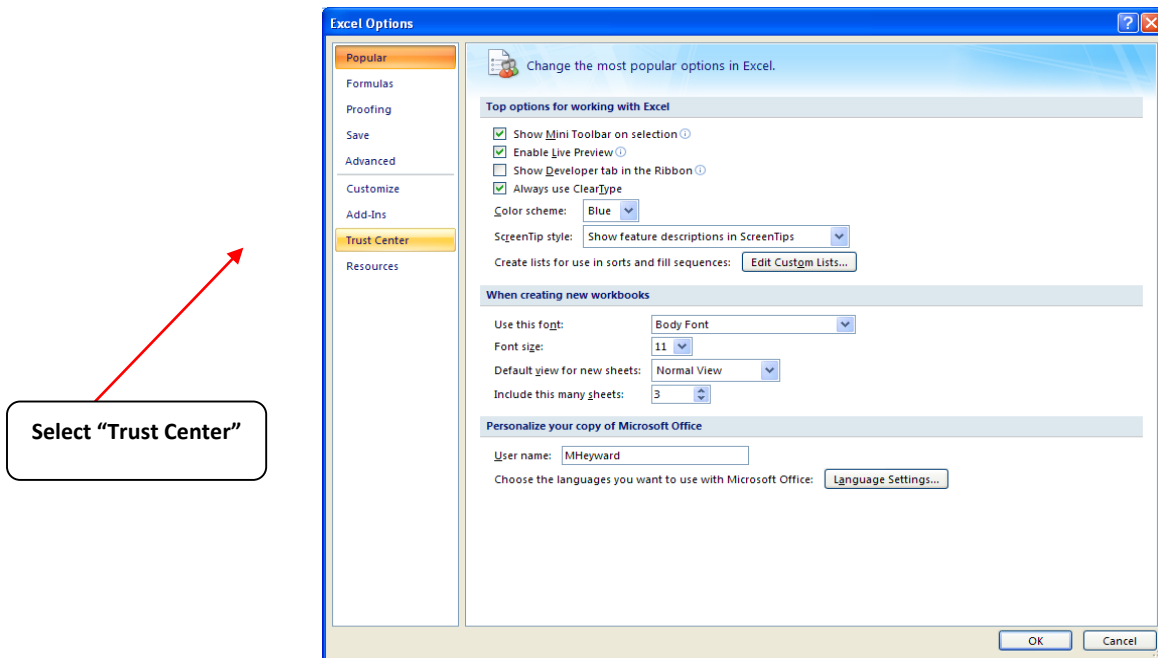


Figure 13: Excel 2010 and Newer Options Drop-Down Menu

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

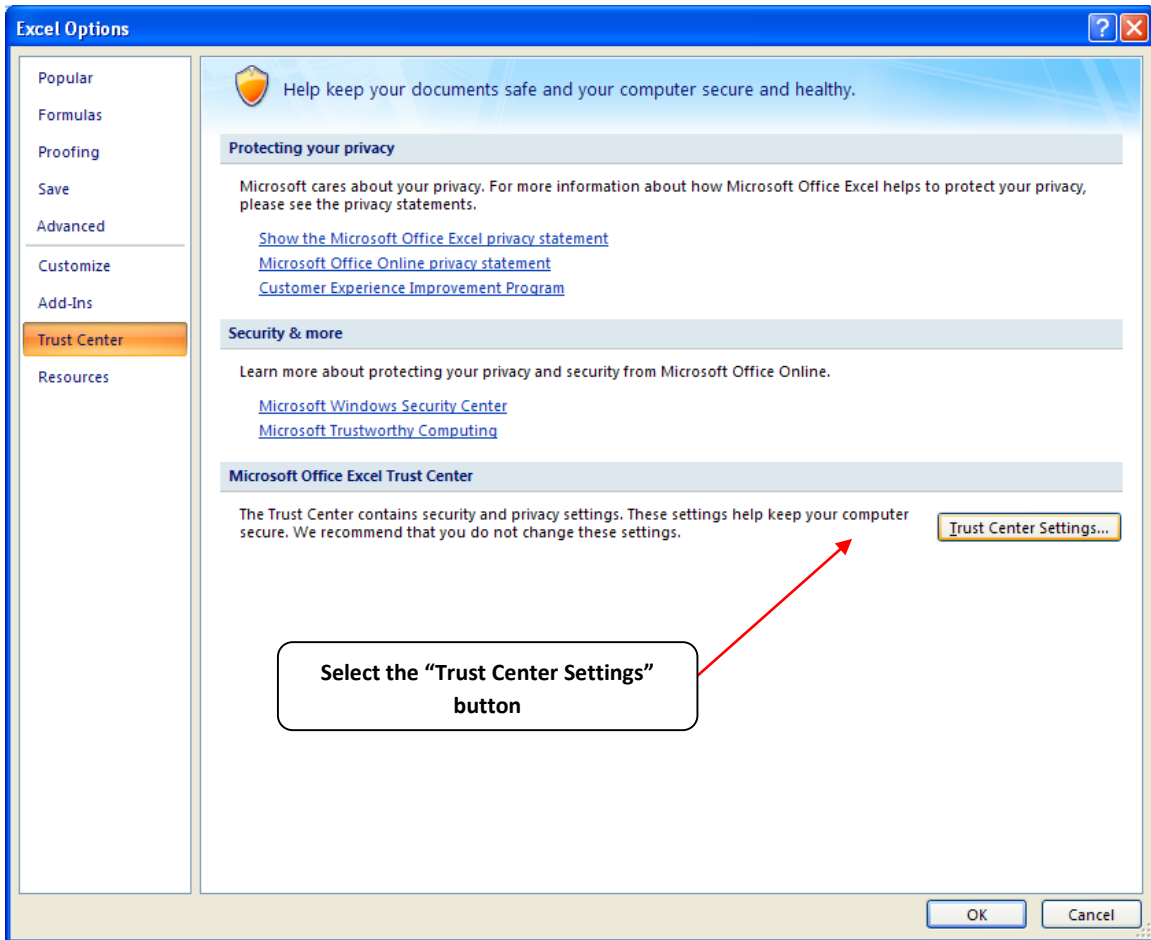


Figure 14: Trust Center Settings Screen

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

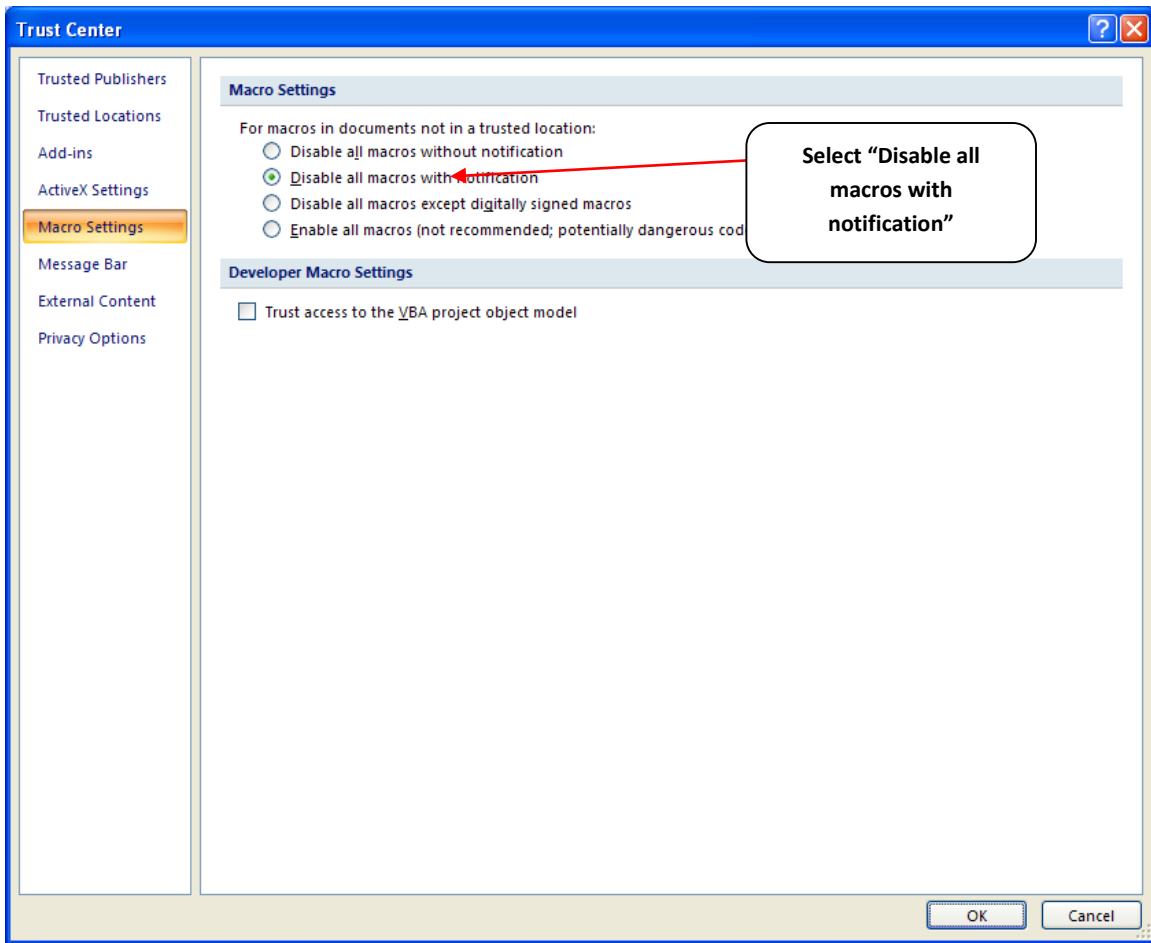


Figure 15: Macro Settings Screen