

How to Open Your SmartWay Tool

The following instructions will help you open and save your SmartWay tool. When you first open the Tool you may need to enable macros or set the security level for Excel.

What Software & Hardware Are Required for Completing the SmartWay Tools?

The Tools are designed in Microsoft Excel using forms and Visual Basic for Applications (VBA) macros and code. Completing a Tool requires the following software and system requirements:

Supported Operating Systems

- Microsoft Windows 7 or later
 - Includes Windows 7, Windows 8 and 8.1, and Windows 10
 - The Tool should also be compatible with Windows XP if all other requirements are met as well. However, Windows XP has reached end of support at Microsoft and this may affect tool performance.

System Requirements

- IBM Pentium processor or newer
- 2 GB Ram
- 100 MB disk space
- Monitor display setting of 1,024 x 768 or larger

Software Requirements

- Microsoft Excel 2010 or later
 - Includes Excel 2010, Excel 2013, Excel 2016 and Excel in Office 365
 - Must be the one-time purchase version of Microsoft Excel installed on a PC or the Office 365 subscription **desktop version** of the application; ***cannot run with Microsoft Excel online or through OneDrive online***
 - The Tool should also be compatible with Excel 2007 if all other requirements are met as well. However, Excel 2007 has reached end of support and Microsoft no longer provides technical support, bug fixes, or security fixes. This may affect tool performance.
 - Excel 2010 will also reach end of support by Microsoft on October 13, 2020.

Please check with the user guides for your computer, online support, or your company's IT department to make sure your system is set up to use the SmartWay Tools.

How Do I Set the Security Level When Opening SmartWay Tools?

Since the Tool employs macros, Excel macros must be enabled to use the Tool. If necessary, follow the directions on the first screen of the Tool to enable macros; follow directions provided on the Microsoft Support website:

<https://support.office.com/en-us/article/Enable-or-disable-macros-in-Office-files-12B036FD-D140-4E74-B45E-16FED1A7E5C6>

or follow the directions below:

Macros must be enabled on your computer to use the SmartWay Tool.

- The default macro security setting in Excel is "Disable all macros with notification."
- When you open the tool, you may get a security alert that macros are present, and you need to choose to enable the macros for this file to work. The steps below describe how to enable macros for different versions of Excel, first if the message bar or security dialog appear, and alternatively in the Trust Center if the message/dialog do not appear.

Enable macros when the Message Bar appears (Excel 2016, 2013, and 2010)

1. When you open the tool, the yellow message bar appears with a shield icon and the **Enable Content** button.



2. On the **Message Bar**, click **Enable Content**.

Note: if the file opens in Protected View, click **Enable Editing** on the message bar. If there is no Enable Editing option, click **for more details** and then click **Edit Anyway**. The Protected View message will look similar to the image below:



Once editing is enabled, follow Steps 1 and 2 above to enable content on the macro message bar.

Enable macros when the Security Options dialog appears (Excel 2007)

1. When the Security Options dialog appears, click **Enable this content**.

Excel 2007 Security Options dialog window:

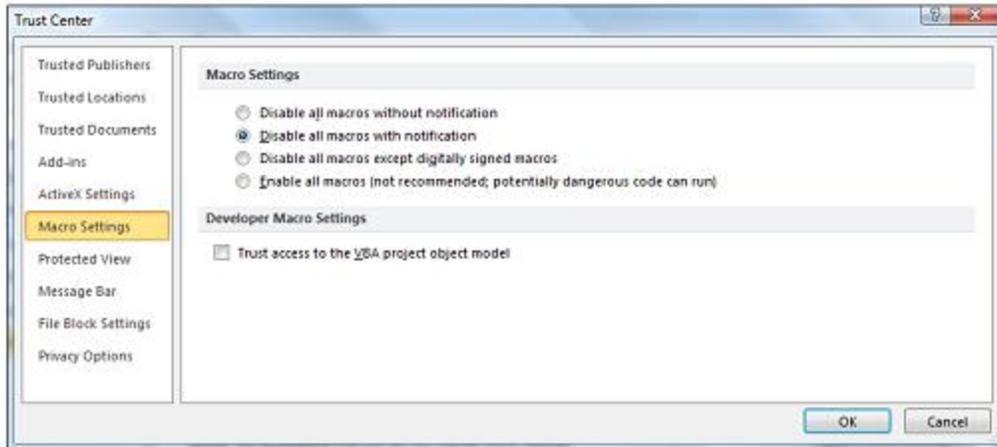


If the Message Bar or Security Options dialog does not appear, change macro settings in the Trust Center.

Change macro settings in the Trust Center (Excel 2016, 2013, 2010, 2007)

1. Click the **File** tab (Excel 2016, 2013, 2010) or the **Microsoft Office Button** (Excel 2007) 
2. Click **Options** (Excel 2016, 2013, 2010) or **Excel Options** (Excel 2007)
3. Click Trust Center, and then click Trust Center Settings.
4. In the **Trust Center**, click **Macro Settings**.
5. Click the option "Disable all macros with notification."
6. Click **OK**.
7. Close out of the Excel file and then re-open it.
8. Follow the previous instructions to Enable macros when the Message Bar or Security Options dialog appears

The following image is the **Macro Settings** area of the Trust Center.



Once macros are enabled (and you are not in Protected View), you should be able to proceed with running the Tool.

If, at this point, the Tool does not open, review the “Software & Hardware Requirements” section above. If after reviewing this section, you cannot determine how to correct the problem, contact your SmartWay Partner Account Manager.