

ShipRequest v3.0 Installation and Setup Instructions

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2.0 Overview

ShipRequest v3.0 can be installed and deployed in two ways: Single User and Enterprise. Single User ShipRequest is intended for small businesses or organizations with a small number of ShipRequest users. Enterprise ShipRequest is intended for large numbers of ShipRequest users. Enterprise ShipRequest allows centralized deployment and administration of ShipRequest. An organization can use both Single User ShipRequest and Enterprise ShipRequest to meet business needs.

Single User ShipRequest

Single User ShipRequest is installed by inserting the ShipRequest CD into the target PC. The ShipRequest install program then automatically starts. The ShipRequest install program presents on-screen instructions on how to proceed. Single User ShipRequest must be configured individually on every computer where it has been installed.

Enterprise ShipRequest

Enterprise ShipRequest allows a system administrator to centrally control all users' ShipRequest settings. A business or organization's system administrator initially installs Enterprise ShipRequest. The system administrator selects a network server with which to deploy ShipRequest. The Enterprise ShipRequest install program copies the ShipRequest install program to the network server, making it available to end users over the local area network (LAN). The system administrator also defines the ShipRequest configuration settings for the organization. Enterprise ShipRequest saves the ShipRequest configuration settings on the server. End users then install ShipRequest from the LAN and download configuration settings determined by the system administrator. Enterprise ShipRequest automatically updates each end user's configuration settings when a system administrator makes a modification. Enterprise ShipRequest also allows for multiple configurations to support different groups in an organization that may need different ShipRequest configurations. An organization needs a LAN to use Enterprise ShipRequest.

 **Need more help?** Call Pitney Bowes Customer Support at **1-800-888-0286** 

3.0 Installing Single User or Enterprise ShipRequest

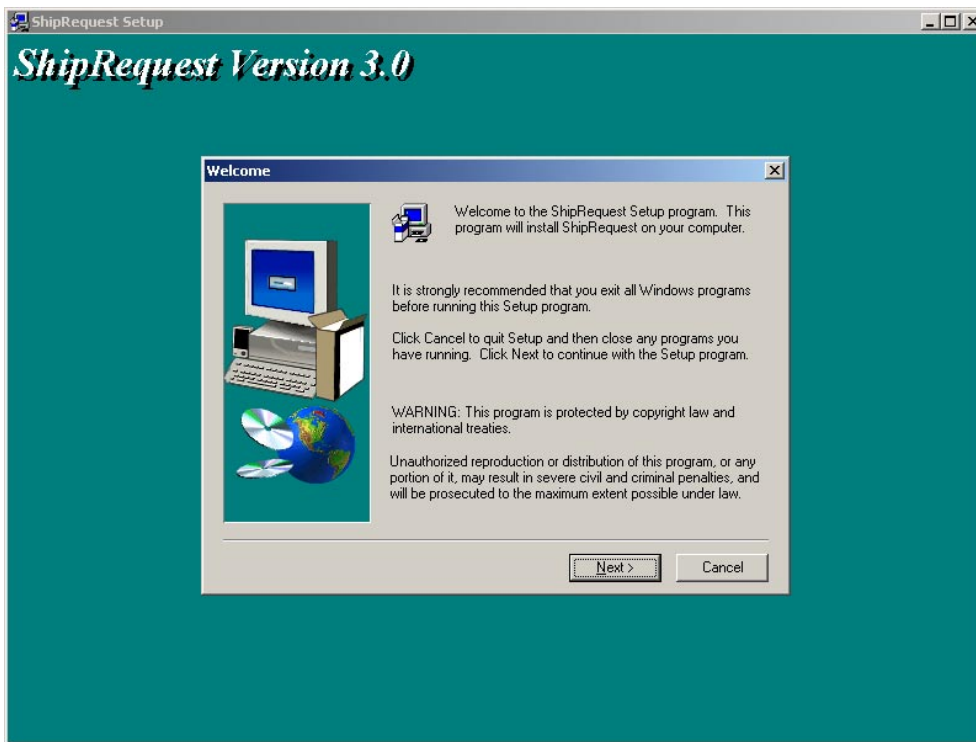
3.1 Single User Installation

1. Insert the ShipRequest CD into the CD-ROM drive. After approximately 15 seconds, the ShipRequest installation program runs automatically.

Note: Some CD-ROM drives are not configured for automatic startup. If the ShipRequest installation program does not start within 15-20 seconds after inserting the CD, do the following:

- a. Click the Windows® **Start** button and select **Run**. The **Run** dialog box displays.
- b. Type **d:\setup.exe** (**D:** represents your CD-ROM drive) in the **Open** text box, and click **OK** or press .

The following setup screen displays:



2. Click **Next** at the Welcome window. The following dialog box displays.



3. Click **NO** that you do not want to install Enterprise ShipRequest. The following dialog box displays:



4. Click **YES** you want to continue setting up Single User ShipRequest. The following Welcome window displays:



5. Click **Next** to begin the installation. The Choose Destination Location window displays.



- Click **Next** to accept the default destination folder. The Start Copying Files window displays:



- Click **Next** to start copying files.
- Once the ShipRequest installation program finishes installing, the Setup Complete window displays:



- Make sure the **Yes, I want to restart my computer now** option is selected, and click **Finish** to reboot your system.
- Proceed with Section 4.0 "ShipRequest Setup" on page 10.

3.2 Enterprise ShipRequest Installation

1. Select a computer to act as a network server to deploy Enterprise ShipRequest. Enterprise ShipRequest will consume approximately 8 MB of disk space on the server. The server can be any computer running a Microsoft Windows operating system or Novell NetWare operating system.

Create a shared folder, volume or drive to host the Enterprise ShipRequest files. The shared area must grant sufficient network permissions to end user accounts so that ShipRequest can read, write, create and modify files in the Enterprise ShipRequest folder or sub folders. The Microsoft networking equivalent for these network permissions is Full Control. Consult Microsoft or Novell documentation or support services for more information on how to share files and grant network permissions.

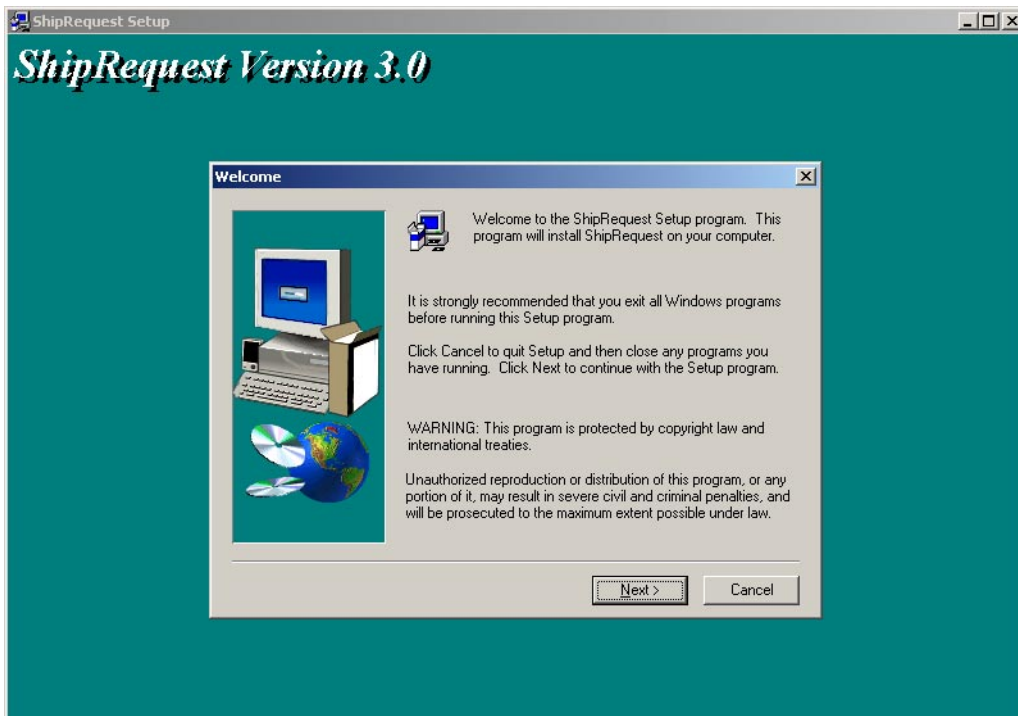
Important! Run Enterprise ShipRequest from a client PC, NOT the network server. Go to a client PC where you want ShipRequest to be installed. This will most likely be the system administrator's personal workstation.

2. Insert the CD into the CD-ROM drive. After approximately 15 seconds, the ShipRequest installation program runs automatically.

Note: Some CD-ROM drives are not configured for automatic startup. If the program does not start within 15-20 seconds after inserting the CD, do the following:

- a. Click **Start** and select **Run**. The **Run** dialog box displays.
 - b. Type **d:\setup.exe** (**D:** represents your CD-ROM drive) in the **Open** text box, and click **OK** or press .
-

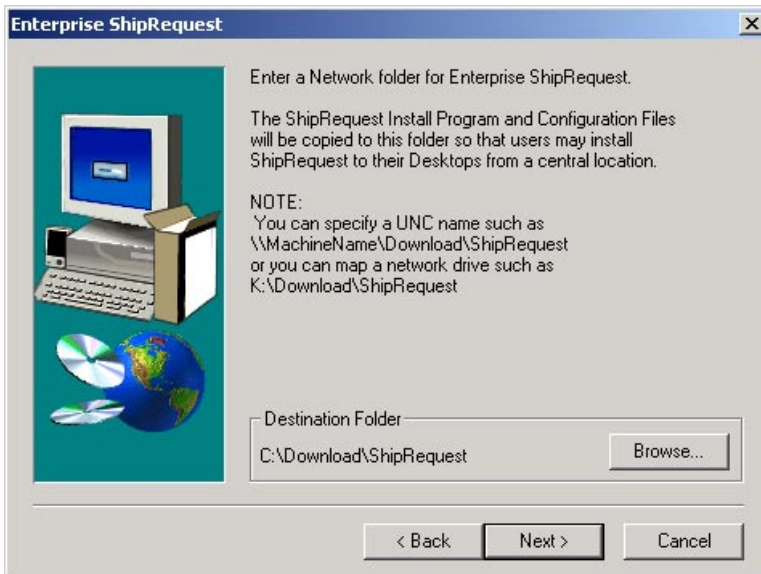
The following Welcome window displays:



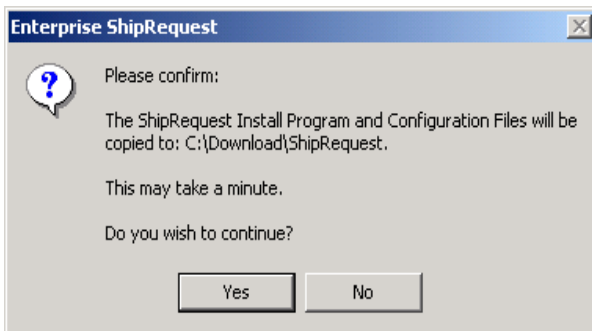
- Click **Next** at the Welcome window. The following dialog box displays:



- Click **Yes** to install Enterprise ShipRequest. The following Enterprise ShipRequest window displays:



- Click the **Browse** button and select the shared folder that was created as part of Step 1.
- Click **Next**, the following dialog box displays:

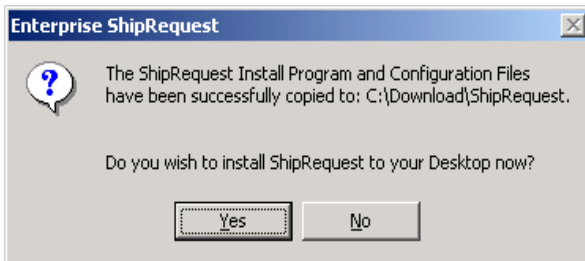


- Click **Yes** to confirm the folder to which the ShipRequest files will be installed.

Important! Only click the **Yes** button to install ShipRequest if you are running the Enterprise ShipRequest installation program from a workstation, **NOT** the network server.

The ShipRequest installation program will copy files to the designated folder. Wait until the installation program has finished. This may take several minutes. The ShipRequest installation program will prompt you when it is done.

The following dialog box displays:



- Click **Yes** to install the program to your PC. The following Welcome window displays:



- Click **Next**. The Choose Destination Location window displays:



10. Click **Next** to accept the default destination folder. The Start Copying Files window displays:



11. Click **Next** to start copying files. When the installation finishes the Setup Complete window displays.



12. Make sure the **Yes, I want to restart my computer now** option is selected, and click **Finish** to restart your computer.
13. Proceed with Section 4.0 "ShipRequest Setup" on page 10.

4.0 ShipRequest Setup

The main setup screen of ShipRequest is basically the same for both the Enterprise and Single User. The main difference is that with Enterprise ShipRequest you can save multiple configurations that applies globally to every user that selects that particular configuration as their current configuration.

Single User ShipRequest is set up and configured individually on every PC so the user will not be asked to select a specific configuration.

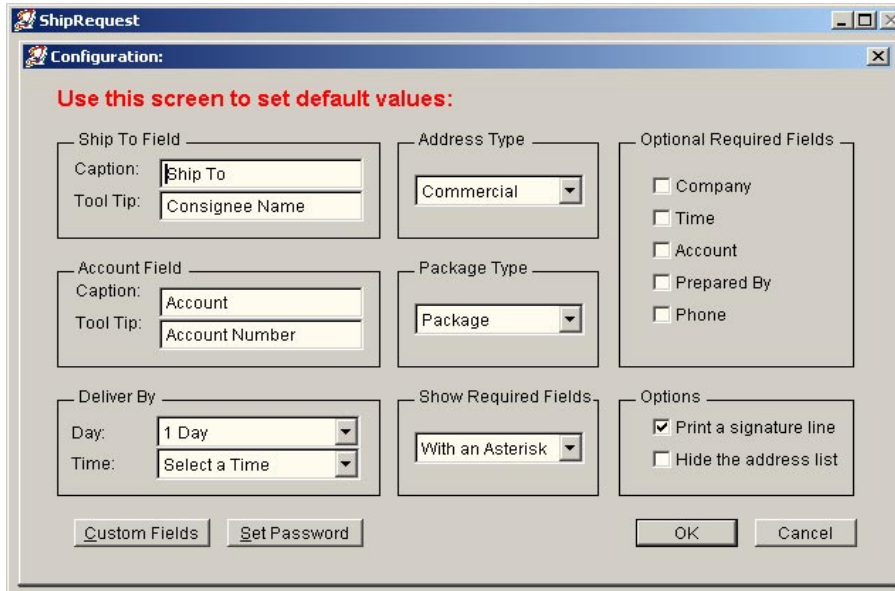
4.1 Single User ShipRequest Setup

1. Start ShipRequest, the following ShipRequest dialog box displays

2. Click the **Setup** button. The following dialog box displays:

3. Click **New**, complete all necessary information for a new sender, and click **Add** (new sender: people for which you are sending packages, including yourself).

4. Repeat Step 3 to add additional new senders.
5. Click **Close** when done adding all new senders.
You can edit or remove any sender from this screen
6. Click the **Advanced** button, the following **Configuration** dialog box displays.



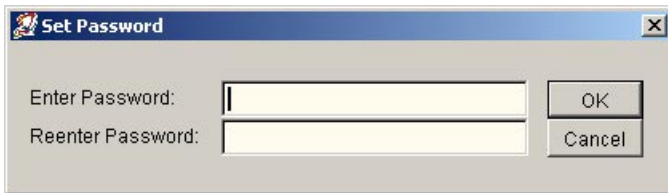
7. Complete the appropriate fields, keeping the following information in mind:
You can change settings for the **Ship To** and **Account** fields if you want something different from the default values:

- **Ship To Field:**
 - Caption**—15 characters maximum
 - Tool Tip**—35 characters maximum
- **Account Field:**
 - Caption**—15 characters maximum
 - Tool Tip**—35 characters maximum

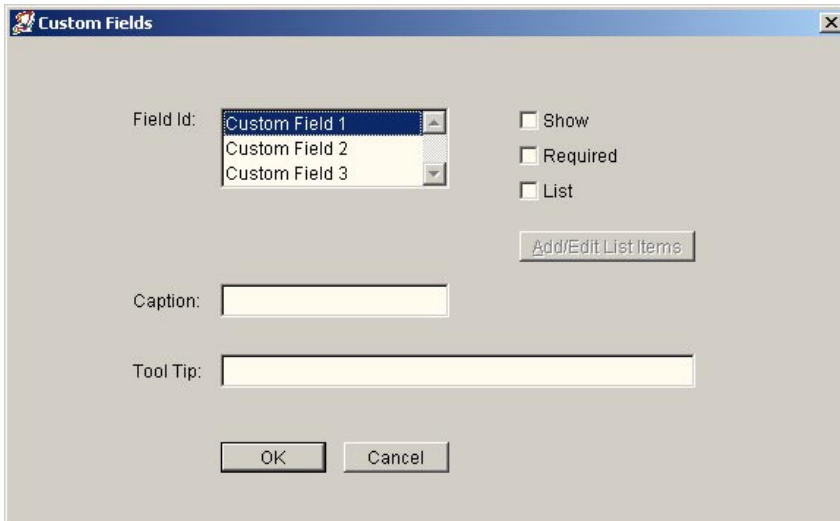
The selected values in the **Deliver By**, **Address** and **Package Type** fields become the default values on the ShipRequest template:

- **Deliver By**
 - Day**—Can select from **1** to **6** days
 - Time**—Choices are **8:30**, **10:30**, **Noon**, **3:30**, **End of Day**
- **Address Type**—Choices are **Residential** or **Commercial**
- **Package Type**—Options are **Package**, **Letter**, or **Tube**

- Show Required Fields—Choices are asterisk (default) or bold type.
 - Optional Required Fields—Select the check boxes for any other field(s) that you want as required fields.
 - Options:
 - Print a Signature Line**—Select this check box if you want a signature line to print on the ShipRequest form. Signature lines should be used when a signature is required to authorize shipments. Leave the check box blank if a signature line is not required.
 - Hide the Address List**—Select this check box if your company does not want to use the Address List. When this check box is selected, the Address List, Sender List and **Save** and **Remove** buttons are hidden on the ShipRequest screen. Consequently, you must manually type in the “Ship To” information and Sender Name. In addition, the Default Country and Sender List become disabled in Setup.
8. Click the **Set Password** button to password protect the Configuration (if applicable, otherwise proceed to Step 11). The following **Set Password** dialog box displays.



9. Enter and then reenter the password to confirm it. The password can be from 1 to 20 characters in length.
10. Click **OK** to exit the **Set Password** dialog box.
11. Click the **Custom Fields** button (if applicable, if not skip to Step 18), the following dialog box displays:

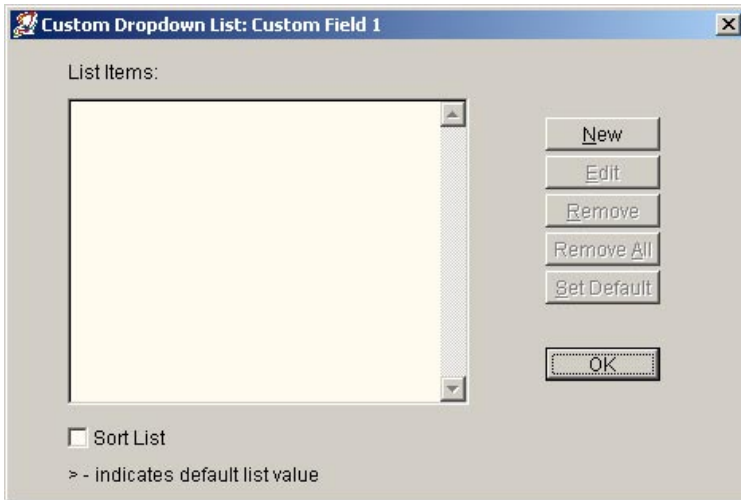


12. Complete the fields on the dialog box as follows:

- **Field Id**—Select what custom field number you want to set up.
- **Caption**—Fill in what caption you want to show on the ShipRequest screen (15 characters max).
- **Tool Tip**—Fill in a detailed meaning of the caption field (60 characters max).
- **Show**—Select this check box if you want this custom field to show up on the ShipRequest screen.
- **Required**—Select this check box if you want to make the field a required field.
- **List**—Select this check box only if you want the user to choose an item from a drop-down box.

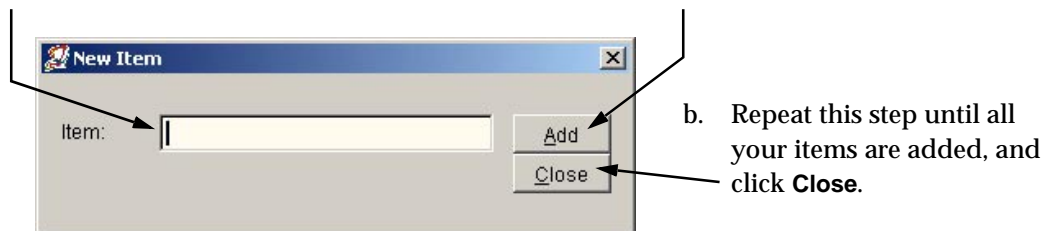
13. If you select the **List** check box, the **Add/Edit List Items** button becomes available. Click the **Add/Edit List Items** button (otherwise proceed to Step 15).

The following **Custom Dropdown List** box displays:



14. Use the dialog box as follows:

- **New**—Click this button to add a new entry. The following **New Item** dialog box displays
 - a. Type in what item you want in the drop-down box, and click **Add**.



To do any of the following, select the appropriate item in the **List Items** box.

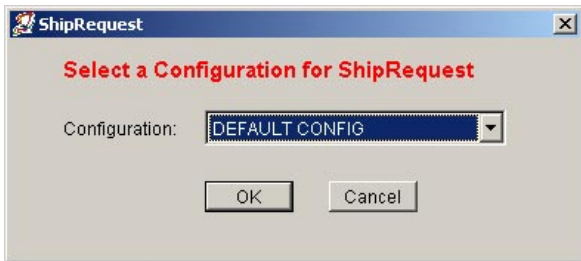
- **Edit**—Click to edit any entry.
- **Remove**—Click to remove one item at a time.

- **Remove All**—Click to remove all entries at one time.
- **Set Default**—Click this button if you want one particular item to show up when you launch ShipRequest.
- **Sort List**—Select this check box if you want to sort the list alphabetically.

15. Click **OK** to exit the **Custom Dropdown List** dialog box.
16. Repeat Step 11 through Step 15 for each custom field you want to set up.
17. Click **OK** to exit the **Custom Fields** dialog box.
18. Click **OK** to exit the **Configuration** dialog box.
19. Click **OK** to exit the **Options** dialog box.

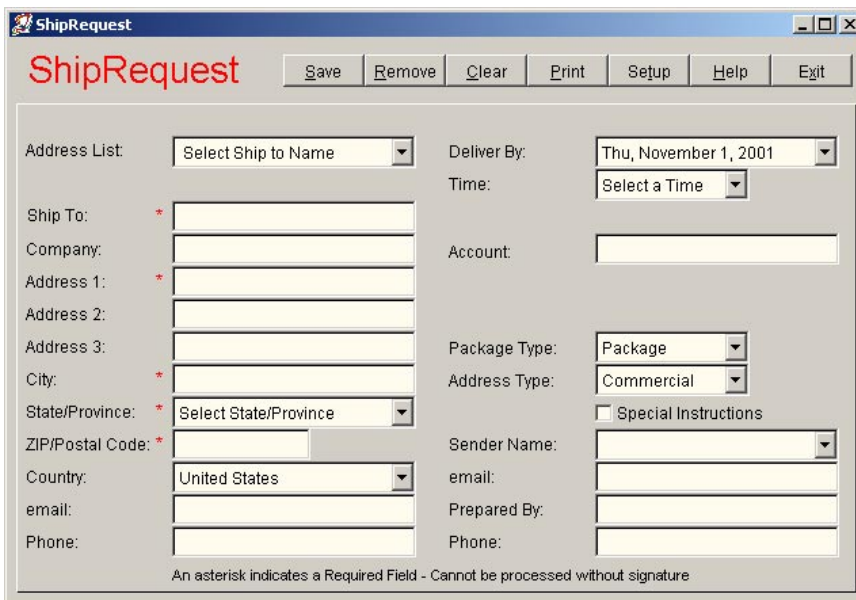
4.2 Enterprise ShipRequest Setup

1. Start ShipRequest, the following dialog box displays:

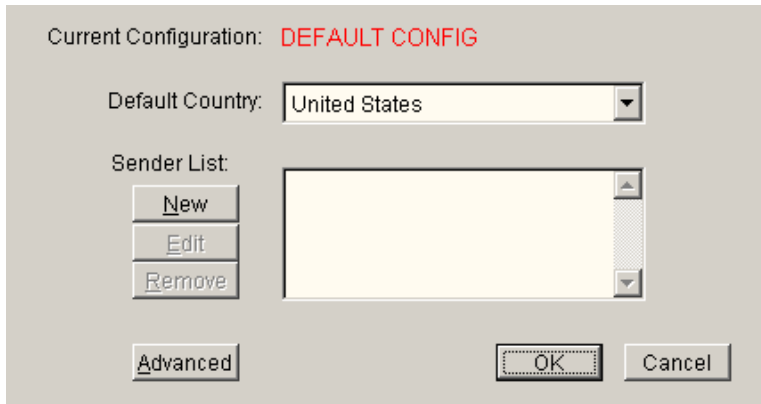


ShipRequest comes with two configurations, Default and Sample.

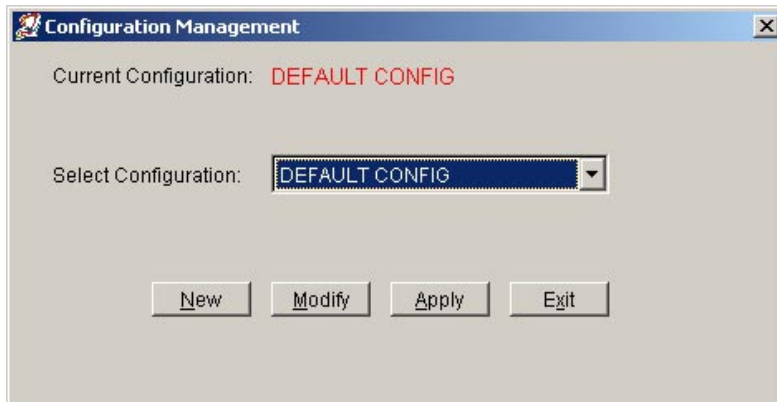
2. Select **DEFAULT CONFIG**, and click **OK**. The following dialog box displays:



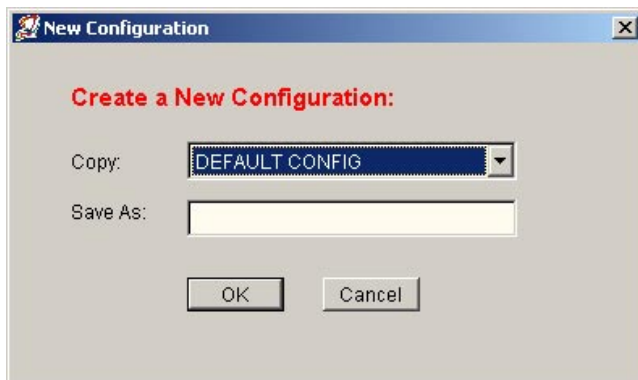
3. Click the **Setup** button, the following dialog box displays:



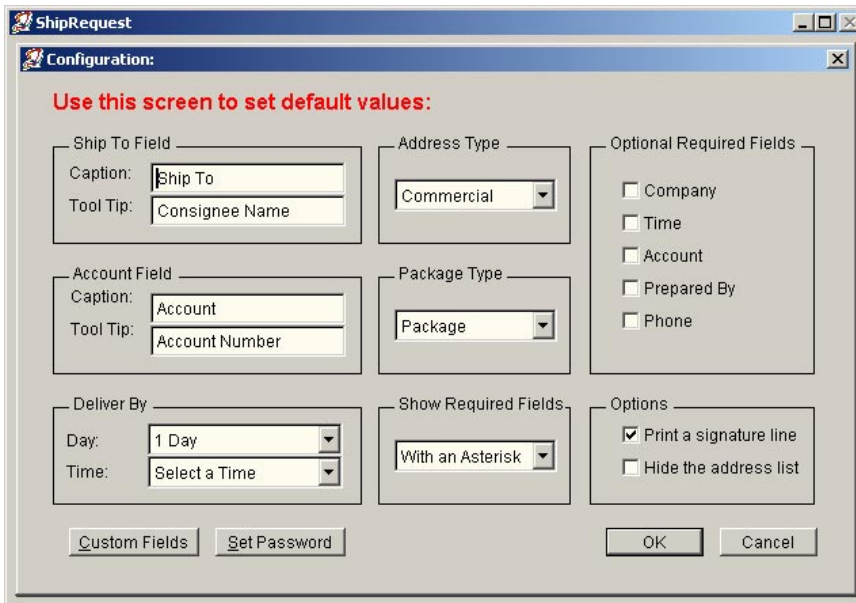
4. Click **New**, fill in all necessary information for a new sender, and click **Add** (new sender: people for whom you are sending packages, including yourself).
5. Click **Close** when done adding all new senders.
You can edit or remove any sender from this screen.
6. Click the **Advanced** button. The following dialog box displays:



7. Click **New** to create a new configuration. The following dialog box displays:



8. From the **Copy** drop-down list box, select the configuration you want to use as a basis for the new configuration.
9. Type in a name for the new configuration in the **Save As** box (e.g., Accounting).
10. Click **OK**, and then click **Modify**. The following dialog box displays:



11. Complete the appropriate fields, keeping the following information in mind:
You can change settings for the **Ship To** and **Account** fields if you want something different from the default values:

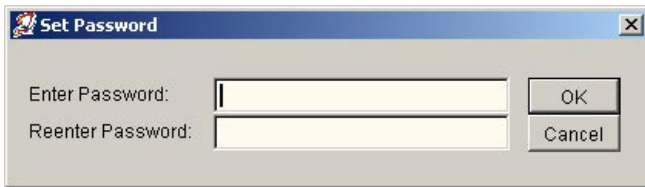
- Ship To Field:
 - Caption—15 characters maximum
 - Tool Tip—35 characters maximum
- Account Field:
 - Caption—15 characters maximum
 - Tool Tip—35 characters maximum

The selected values in the **Deliver By**, **Address** and **Package Type** fields become the default values on the ShipRequest template:

- Deliver By
 - Day—Can select from 1 to 6 days
 - Time—Choices are 8:30, 10:30, Noon, 3:30, End of Day
- Address Type—Choices are **Residential** or **Commercial**
- Package Type—Options are **Package**, **Letter**, or **Tube**

- Show Required Fields—Choices are Asterisk (default) or bold
- Optional Required Fields—Select the check boxes for any other field(s) that you want as required fields.
- Options:
 - Print a Signature Line**—Select this check box if you want a signature line to print on the ShipRequest form. Signature lines should be used when a signature is required to authorize shipments. Leave the check box blank if a signature line is not required.
 - Hide the Address List**—Select this check box if your company does not want to use the Address List. When this check box is selected, the Address List, Sender List and **Save** and **Remove** buttons are hidden on the ShipRequest screen. Consequently, you must manually type in the “Ship To” information and Sender Name. In addition, the Default Country and Sender List become disabled in Setup.

12. Click the **Set Password** button to password protect the Configuration (if applicable, otherwise skip to Step 15). The following dialog box displays:

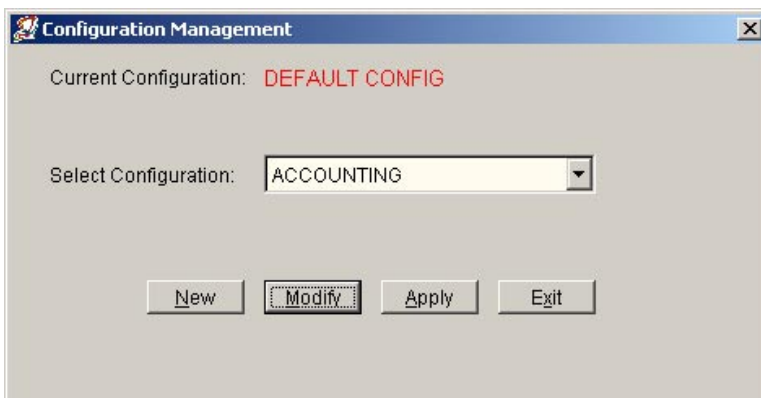


13. Enter and then reenter the password to confirm it. The password can be up to 20 characters in length.

14. Click **OK** to exit the **Set Password** dialog box.

15. Click the Custom Field button to set any custom field attributes (if applicable, refer to Step 11 through Step 17 in Section 4.1 “Single User ShipRequest Setup”). Otherwise, proceed to Step 16.

16. Click **OK**. The following dialog box displays:



17. Click **Apply** if you want to make the configuration you just created the current configuration on your local PC.

OR

Click **New** to create another new configuration.

OR

Click **Modify** to modify an existing configuration.

18. Click **Exit** when done.

19. Click **OK** to return to the ShipRequest processing screen.

5.0 Enterprise ShipRequest End User Installation and Setup

ShipRequest end users should install ShipRequest from the Enterprise ShipRequest folder on the network. End users will not be prompted about Single User ShipRequest or Enterprise ShipRequest. End users will be automatically configured to be part of the Enterprise ShipRequest system you have set up. The first time a ShipRequest end user runs ShipRequest, they will be instructed to select a ShipRequest configuration. End users should receive direction from the system administrator about which ShipRequest configuration to select. Enterprise ShipRequest can run with a single configuration for all users or different configurations for different groups of users. If a system administrator updates a ShipRequest configuration, the modified configuration will automatically be copied to the end users' desktop workstations when they subsequently run ShipRequest.

6.0 Enterprise ShipRequest Uninstall Procedure

To uninstall Enterprise ShipRequest, uninstall ShipRequest from every desktop user's PC. The Enterprise ShipRequest folder must then be manually deleted from the network.

To delete an individual Enterprise ShipRequest configuration, delete the appropriate sub folder in the Enterprise ShipRequest folder. For example, to delete a ShipRequest configuration called Accounting, delete the Accounting folder in the Enterprise ShipRequest folder.

The Default and Sample configurations should NOT be deleted.