I just installed ILLiad on a new computer, what settings or permissions should I have on my computer?

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Symptom

- After recently installing ILLiad Client on a new computer what Windows Permissions and Word Settings are needed for ILLiad.

Applies to

- ILLiad

Resolution

Here are the Word Settings and the Windows Permissions to set up on the computer:

For Office 2010 and above permissions:

Configuration considerations:

There are some sites reporting issues, but they are not related to ILLiad specifically, but to Office 2010 and Word Macros in general. As Word macros have been the source of some security concerns over the years, Microsoft decided to 'lock down' their usage in the latest version.

To enable the ILLiad template macros, check these settings in Office 2010 and above:

Select "Options" located towards the bottom of the left-hand menu

Select "Trust Center" located at the bottom of the left-hand menu

Select "Trust Center Settings" located at the bottom far right.

Select Macro Settings on the left side.

Then click on the "Enable Macros" bottom.

Choose OK.

Choose OK again.
To disable the "enable printing" and "enable editing" macros in Office 2010 and above, follow the directions below:

In Microsoft Word (or Excel), select the "File" tab located at the top left-hand side.
Select "Options" located towards the bottom of the left-hand menu
Select "Trust Center" located at the bottom of the left-hand menu
Select "Trust Center Setting" located at the bottom far right
Select "Protected View" located at the bottom of the left-hand menu
Uncheck the following three option located under "Protected View."
- Enable Protected View for files originating from the Internet
- Enable Protected View for files located in potentially unsafe locations
- Enable Protected View for Outlook attachments
Select OK
Select OK again

Also, when using Office 2013, and newer versions, follow these steps:

Word 2013 has a new feature call reading view, and it uses this view for any uneditable files. Word will open the template documents as "Read Only," Word initially displays the document in this view which has the unfortunate side effect of disabling mail merge operations. To work around the issue:
1. Open options in Word
2. On the General tab, there is a section for Startup options which includes a setting with "Open e-mail attachments and other uneditable files in reading view." Make sure that it is unchecked, and it will correct the issue.

Also, here are the Windows Permissions needed:

If using Windows 7 64-bit or Windows 10 64-bit, it is at c:\program files (x86)\illiad\ by default. Any other previous version of Windows, it will be at c:\program files\illiad\ by default. In addition, for shared print drives, these permissions will need to be added to the Shared Print drive directory. To access the directory correctly, make sure the permissions are correct. I have written instructions on how to do this:

With Windows 7 64-bit or Windows 10 and above 64-bit, add Permissions for each user's Windows log on to the security settings for the ILLiad folder in the c:\program files (x86)\illiad\. With Windows 7 32-bit or Windows 10 32-bit, work with the c:\program files\ILLiad\ folder. Also, if using a shared print drive, add it to the folder where the
print documents are.

1. First, right-click on the ILLiad folder and choose properties.

2. Go to the Security tab and in the top section, choose Edit to edit the Users group. This should have the name as (the System Name)\Users

3. Select the Users group and under the Allow column mark the full permissions.

4. After clicking OK, then it arrives at the Main ILLiad Permissions Window.

5. Choose OK to get out of the window.

If Windows was recently updated, these permissions need to be updated on the computer.