What Windows permissions or Word settings should I be concerned with when using ILLiad?

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Symptom

- You are installing a new ILLiad Client on a computer, or you are upgrading your Windows Version, or you are upgrading your Microsoft Office, and you want to know what Windows Permissions or Word settings you should make sure you have on the computer.

Applies to

- ILLiad

Resolution

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

For Office 2010 and above permissions:

There are some configurations you will need to have:

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:

1. Select "Options" located towards the bottom of the left-hand menu
2. Select "Trust Center" located at the bottom of the left-hand menu
3. Select "Trust Center Settings" located at the bottom far right.
4. Select Macro Settings on the left side.
5. Then click on the "Enable Macros" bottom.
6. Choose OK.
7. Choose OK again.

https://help.oclc.org/Resource_Sharing/ILLiad/Troubleshooting/What_Windows_permissions_or_Word_settings_s...
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.

1. Select "Options" located towards the bottom of the left-hand menu
2. Select "Trust Center" located at the bottom of the left-hand menu
3. Select "Trust Center Setting" located at the bottom far right
4. Select "Protected View" located at the bottom of the left-hand menu
5. Uncheck the following three option located under "Protected View."
6. Enable Protected View for files originating from the Internet
7. Enable Protected View for files located in potentially unsafe locations
8. Enable Protected View for Outlook attachments
9. Select OK
10. Select OK again

Also, when you are using Office 2013, and above, you need to do this:

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. You open the 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 is unchecked, and it will correct the issue.

Also, here are the Windows Permissions you need:

With Windows 7 x 64, you need to 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 x 32, you work with the c:\program files\ILLiad\ folder. Please do the following:

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

2. Go to the Security tab and in the top section, choose Edit so you can edit the Users group.

3. Select the Users group and below mark the full permissions.

4. Once you click OK, then you will be back to the Main ILLiad Permissions Window.

5. Choose Ok to get out of the window.