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To set the Saved Data Path and/or Proxy Settings (Globally)

- Obtain the IntelliFormsAdmin.xml file from:
<http://files.cchsf.com/releases/intelliforms/AdminTool/IntelliFormsAdmin.zip>
- In Notepad, open **IntelliFormsAdmin.xml** file and note its format:

```
<?xml version="1.0" ?>
<AdminConfiguration>
    <DataPath></DataPath>
    <ProxyName></ProxyName>
    <ProxyPort></ProxyPort>
    <DisableProgramUpdates></DisableProgramUpdates>
</AdminConfiguration>
```

- Between the **<DataPath>** and **</DataPath>** markers enter the path where you wish to save the data. This can be a local drive location or a share on a server. You may use either a mapped drive or a UNC path.
If you are globally setting your proxy server settings, the proxy server name or IP address is entered between **<ProxyName>** and **</ProxyName>**. If you enter a proxy name or IP address, make sure you also enter the proxy's port number between **<ProxyPort>** and **</ProxyPort>**.
 - In the example below, all users will share data saved in a common network folder:

```
<?xml version="1.0" ?>
<AdminConfiguration>
    <DataPath>\\fileserver\sharename\data\IntelliForms</DataPath>
    <ProxyName></ProxyName>
    <ProxyPort></ProxyPort>
    <DisableProgramUpdates></DisableProgramUpdates>
</AdminConfiguration>
```

- In the example below, each user has a unique folder for saving their data by using the %USERNAME% variable:

```
<?xml version="1.0" ?>
<AdminConfiguration>
    <DataPath>\\fileserver\sharename\IntelliForms\%USERNAME%\Data</DataPath>
    <ProxyName></ProxyName>
    <ProxyPort></ProxyPort>
    <DisableProgramUpdates></DisableProgramUpdates>
</AdminConfiguration>
```

- In the example below, the default saved data path is being used and a Proxy name and port has been entered:

```
<?xml version="1.0" ?>
<AdminConfiguration>
    <DataPath></DataPath>
    <ProxyName>myproxy.proxydomain.com</ProxyName>
    <ProxyPort>80</ProxyPort>
    <DisableProgramUpdates></DisableProgramUpdates>
</AdminConfiguration>
```

- In the example below, all users will share data saved in a common network folder: with a mapped drive and the IP address and port is being used for the proxy settings:

```
<?xml version="1.0" ?>
<AdminConfiguration>
    <DataPath>D:\IntelliForms\Data</DataPath>
    <ProxyName>10.22.54.215</ProxyName>
    <ProxyPort>8080</ProxyPort>
    <DisableProgramUpdates></DisableProgramUpdates>
</AdminConfiguration>
```

- In Notepad, click **File > Save**.

To set the Blank Forms Cache Path

CCH® IntelliForms® caches downloaded blank forms to improve performance. In a Citrix/Remote Desktop server farm environment the default forms cache location resides at C:\ProgramData\Wolters Kluwer\IntelliForms\Data on each server. Each user has their own cache folder. Thus a user can have multiple blank forms cache scattered about the

farm if the user's subsequent sessions hit different servers. In such an environment the scattered blank form caches may get out of sync. This may result in a longer download time while the cache is updated upon launch of CCH IntelliForms. Moving the cache to a single shared location can improve performance by keeping each user's blank forms cache synced between all servers.

Notes:

- The Blank Forms Cache path can only be changed using IntelliFormsAdmin.xml.
- The folder where each user's cache subfolders will reside will need to be created prior to deployment of IntelliFormsAdmin.xml. For example, if the cache is being redirected to \\servername\share\Data\Cache, the Cache folder will need to be created prior to deployment.
- Users need to have at least **Modify** rights to the location.

1. In Notepad open **IntelliFormsAdmin.xml**.
2. Add the following line:

<UserProfilesPath></UserProfilesPath>

Here is an example of its position in the file:

```
<?xml version="1.0" ?>
<AdminConfiguration>
  <DataPath></DataPath>
  <ProxyName></ProxyName>
  <ProxyPort></ProxyPort>
  <DisableProgramUpdates></DisableProgramUpdates>
  <UserProfilesPath></UserProfilesPath>
</AdminConfiguration>
```

3. Between the **<UserProfilesPath>** and **</UserProfilesPath>** markers add the location where the Blank Forms Cache will reside. You can use a mapped drive letter or UNC path:

<UserProfilesPath>\\fileserver\sharename\IntelliForms\Cache</UserProfilesPath>

4. In Notepad, click **File > Save**.

To disable in-app updates

In some situations, CCH IntelliForms is able to automatically download program updates and prompt the user to install it. This process will occur each time CCH IntelliForms is

launched until the update is applied. The update process requires administrative rights. Most Citrix/Remote Desktop Server session users or computer users who had CCH IntelliForms installed by a Group Policy only have limited rights. This can cause an installation loop where CCH IntelliForms downloads the update when launched, prompts the user to install the update, then prompts for administrator credentials, where the user will need click **No** if administrator credentials cannot be provided. This will end the update installation, but the process will repeat again when CCH IntelliForms is restarted and continue to loop, until the application is updated. This process can be temporarily halted by following the steps in our Knowledge Base article: [CCH® IntelliForms® automatic program update keeps looping after clicking No at Admin installation prompt.](#)

In environments where users do not have administrative rights, it may be best to disable the in-app update feature and update CCH IntelliForms by following the steps in our Knowledge Base articles:

- [How do I upgrade a previous version of CCH® IntelliForms® on Citrix® XenApp® and Microsoft® Remote Desktop servers?](#)
- [How do I upgrade a previous version of CCH® IntelliForms® using Active Directory Group Policy Objects \(GPO\)?](#)

To disable the in-app update feature:

1. Open **IntelliFormsAdmin.xml** file in Notepad.
2. Locate the **<DisableProgramUpdates>** and **</DisableProgramUpdates>** markers.
3. Enter **"true"** between the markers, as in the example below:

```
<?xml version="1.0" ?>
<AdminConfiguration>
    <DataPath></DataPath>
    <ProxyName></ProxyName>
    <ProxyPort></ProxyPort>
    <DisableProgramUpdates>true</DisableProgramUpdates>
</AdminConfiguration>
```

4. In Notepad, click **File > Save**.

Notes

- **Citrix/Remote Desktop/Terminal Server:**

Copy or Move the **IntelliFormsAdmin.xml** file to the CCH IntelliForms application folder where IntelliForms.exe resides. See the [How to install CCH® IntelliForms® on Citrix/Remote Desktop Servers](#) for the default application folder location. If you changed the application folder location during installation, modify this step to reflect your change.

- **Active Directory (GPO):**

Copy or Move the **IntelliFormsAdmin.xml** file to the appropriate location in your Distribution Point you set up. See [How to install CCH® IntelliForms® with Active Directory Group Policy Objects \(GPO\)](#) installation instructions for further information.

- **Special Environments**

The IntelliFormsAdmin.xml file is beneficial in environments where the C: drive is wiped after a user log off. Using the IntelliFormsAdmin.xml file prevents the rebuilding of the Blank Forms Cache each time a user establishes a new CCH IntelliForms session by allowing you to move the cache to a persistent location. Once the cache is permanent it will update itself with new form downloads only. Copy or Move the **IntelliFormsAdmin.xml** file to the CCH IntelliForms application folder where **IntelliForms.exe** resides prior to deploying the environment to users.