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

- Obtain the IntelliFormsAdmin.xml file from:
<http://files.cchsfs.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>
</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>
</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>
</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>
</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>
</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>
  <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**.

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.