

Installation

Intelliform installs easily on most computers and will usually take only a few minutes. However, if you need help, email us at techsupport@intelliform.net.

Intelliform requires Windows XP, Windows 2000 Pro SP2, Windows 2003, Windows Vista, Windows 2008, or Windows 7/8/10. We do NOT support Windows 98, Windows ME, or 2000/XP HOME edition, although it should run OK on them. Vista Starter Edition is not supported and probably will NOT support networking

Although you are allowed to change where the program is installed, do NOT install the program under "Documents and Settings", "My Documents", "Program Files", "Windows", or any of the Windows protected directories since this may result in the program not working due to permissions and/or who is logged in.

Intelliform will automatically create a desktop Icon for you.

When you re-install or upgrade the program, only the program files are affected, not your data files. Your data files will retain all of the information you have already entered

For security reasons, the installation program does NOT allow the program to be installed in the root directory of any drive, including any mapped drives. Also, for security reasons, we do not recommend sharing the root directory of the server.

If you want to have multiple users or just want to install on a network, please use the Network/Multi-User Installation below.

Single User Installation:

1. download and install the program from our website intelliform.net
2. you can choose to load the demo data if you just want to see how it works.
3. run Intelliform and goto Help -> Intelliform Upgrade.
4. input the Serial # sent to you by email, check Update License, and click Update

Network/Multi-User Installation:

Choose one computer to act as the "server". The server can be running any of the above operating system versions (except Vista Starter Edition). This computer can be used normally but must be left running for other computers to see and use the data.

1. On the server, download and install the program from our website intelliform.net
Refer to the Recommended Server Setup below to setup your network
2. run Intelliform and goto Help -> Intelliform Upgrade.
3. input the Serial # sent to you by email, check Update License, and click Update
4. on all other computers (clients), create an icon that points to the program IFORM.EXE on the server

NOTE: On each client workstation, you should reference a mapped network drive, not to the UNC directory (eg. Icon target M:\IFORM\IFORM.EXE, not \\SERVER\APPS\IFORM\IFORM.EXE. The reason for this is that a few parts of the program work better with a mapped drive letter.

Recommended Server Setup:

1. On the server, create a directory that Intelliform and/or other network programs will be installed under. For example, C:\APPS on the server.

Do NOT create the directory under "Documents and Settings", "My Documents", "Program Files", "Windows", or under any of the Windows protected directories since this may result in the program not working due to permissions and/or who is logged in.

1. Share this directory and give full permissions to all authorized users.
2. Install the software to a location in this directory. For example, C:\APPS\IFORM
3. On each client, map the shared server directory to a drive letter. For example, you would map the resource \\SERVER\APPS to M:
4. On each client, create an icon to run the program as explained above.

NOTE: on networks with very high usage, we recommend that write caching be turned off; please see LOCKING.RTF in your Intelliform docs directory.

To install an upgrade:

1. start Intelliform and goto Help -> Intelliform Upgrade.

We strongly recommend you always run Admin -> Fix and Optimize before upgrading

If you are on a network, we strongly recommend you update on the server machine.

Moving your data on the same computer

If you want to move your program or data to a different location on the same computer, you should move your entire Intelliform directory to the new location and then change the intelliform icon to point to the new location.

Moving your data to a new computer

On the old computer that holds the data, go to Admin->Backup and backup to a CD or Flash Drive. On the new computer, download and install the program file from www.intelliform.net Then run intelliform and use Admin->Restore to restore from the backup you made . You will probably need to setup Email again and adjust the icons on any other computers