

# 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](mailto: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

## To install the program from the internet:

1. download and run the program from our website [intelliform.net](http://intelliform.net)
2. goto Help -> Intelliform Upgrade.
3. input the Serial # sent to you by email, check Update License, and click Update

## To install the demo from the internet:

1. download and run the program from our website [intelliform.net](http://intelliform.net)
2. follow the directions on your screen; choose Demo Data when asked

## To install the program or upgrade from CD:

1. Insert the Intelliform CD into your CD drive. The Intelliform setup should start automatically. If it does not, click on START, RUN, then type: **D:\SETUP.EXE** where D is your CD drive
2. Follow the directions on your screen.

## To install an upgrade:

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

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

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.**

## Network Installation

One computer on the network must be the server. The server can be running any of the above operating system versions (except Vista Starter Edition).

## Install the program on the server machine:

1. download and install the program from our website [intelliform.net](http://intelliform.net)  
*Refer to the Recommended Server Setup below to setup your network*
2. goto Help -> Intelliform Upgrade.

3. input the Serial # sent to you by email, check Update License, and click Update

### **Install the program on all other machines (clients):**

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

### **Moving Your Intelliform Files:**

If you want to move your program or data to a different location, you should move your entire Intelliform directory to the new location. You could be doing this because you are upgrading for single use to multiple users and want to have the data on a server or you may simply want to move the program from the "Program Files" or other windows protected directory.

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