XACTIMATE®

version 28

Installation Guide

Desktop

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Xactware.com

Xactimate version 28 Installation Guide

INTRODUCTION

This chapter provides step-by-step instructions for installing Xactimate on a stand-alone computer. *Your computer must meet the minimum system requirements for Xactimate.* Xactware strongly encourages installing on a computer that meets the recommended requirements. These requirements are listed in “System Requirements - Xactimate v28.0 Desktop & Online” on page 2 and can also be found on Xactware.com.

NOTE REGARDING THE MULTI-VERSION INSTALL

A subscription to Xactimate Professional is required to install multiple versions of Xactimate.

Because it is common practice for service providers to work for multiple insurance carriers at the same time, multiple versions of Xactimate can be installed on the same computer. It is critical to back up your data using Data Transfer before performing Multi-Version installs. Each version of Xactimate will have its own icon and database, and will be registered to display in the “Add or Remove Programs” section of your operating system. Also, each version can be installed and uninstalled separately.

Please note: If you uninstall the standard version *before* uninstalling a Multi-Version of Xactimate, the Multi-Version program will be inaccessible. We recommend you make a backup of your Multi-Version data before uninstalling the standard release.

Attention! Some profiles are only available in specific versions of Xactimate. The data in these profiles will only be available within the approved version. If you require multiple versions of Xactimate to run all your profiles, you can upgrade to Xactimate Professional by calling 1-800-424-XACT(9228).

System Requirements - Xactimate v28.0 Desktop & Online

Specifications	Minimum Requirements	Recommended Requirements
Processor	Single Core Processor 1.5GHz	Dual Core Processors
Operating System	Windows 8 (32 bit, 64 bit) Windows 7 (32 bit, 64 bit) Windows Vista (32 bit, 64 bit Business, 64 bit Ultimate) Windows XP Service Pack 3 ***Windows RT is not Supported**	
Video Card	Open GL 2.0 Compatible with 128 MB of VRAM and Latest Drivers	Open GL 2.0 Compatible with 512 MB of VRAM and Latest Drivers
Memory	2 GB of RAM	4 GB of RAM or More
Hard Drive Space	5 GB of Continual Free Space	10 GB of Continual Free Space
Hard Drive Speed	5400 PRM Drive	7200 RPM Driver of Faster
Resolution	1024 x 768	1280 x 900 or Higher
Internet Connection	A Broadband Internet Connection is Recommended (required if using Xactimate Online)	
Internet Browser	Internet Explorer 8.0 or Above	
Optical Drive	A DVD Drive is Required to Install Xactimate from a Disk	
Prerequisites	Microsoft.Net Framework 4.0 or Higher Version 4.0 Packaged with Xactimate 28	
	Microsoft SQL Server or Express Edition 2008 or 2012 *2008 Required for Windows XP *2012 Required for Windows 7 or 8 Microsoft SQL Server Express 2008 and 2012 are packaged with Xactimate 28. Microsoft Silverlight 5.0 or Higher (Only Needed if Using Xactimate Online)	

New Install of Xactimate

DVD Installation

1. Make sure you have an active connection to the Internet.
2. On the computer, insert the **Xactimate DVD**.
   The installation procedure should begin automatically.

If the Xactimate setup does not begin immediately, follow these steps:

For Windows XP

a. Click the Windows **Start**.
b. Click **Run**.
c. Type **D:\setup.exe**.
   If your DVD-ROM drive is not D, type the letter for your DVD drive instead.
d. Click **OK**.

For Windows Vista

a. Click the Windows **Start**.
b. In the *Start Search* field, type **D:\setup.exe**.
   If your DVD-ROM drive is not D, type the letter for your DVD drive instead.
c. Press **Enter**.

For Windows 7

a. Click the Windows **Start** button.
b. In the Search programs and files field, type **D:\setup.exe**.
   If your DVD-ROM drive is not D, type the letter for your DVD drive instead.
c. Press **Enter**.

For Windows 8

a. Type **D:\setup.exe**.
   If your DVD-ROM drive is not D, type the letter for your DVD drive instead.
b. Press **Enter**.

3. Continue to **“Run the Installation” on page 5.**

DOWNLOAD INSTALLATION

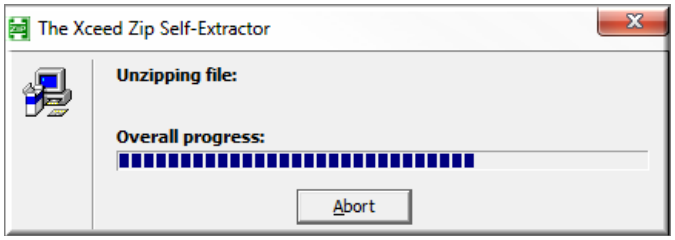
1. The confirmation email you receive from the Xactware.com shopping cart if you ordered online or from Xactware Sales if you ordered by phone, will contain a link to the Xactimate download web page. Click the link. When the Xactimate web page appears, click the **Download 28** button.

On the Internet Explorer window, the following dialog box appears.

2. To change the **Save to folder**, click the dropdown arrow to the right of **Save** and navigate to the desired **location**.

3. Click **Run**.

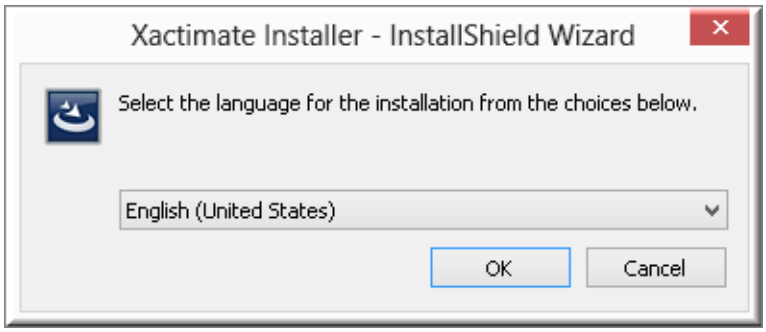
The Xceed Zip Self-Extractor unzips the file.



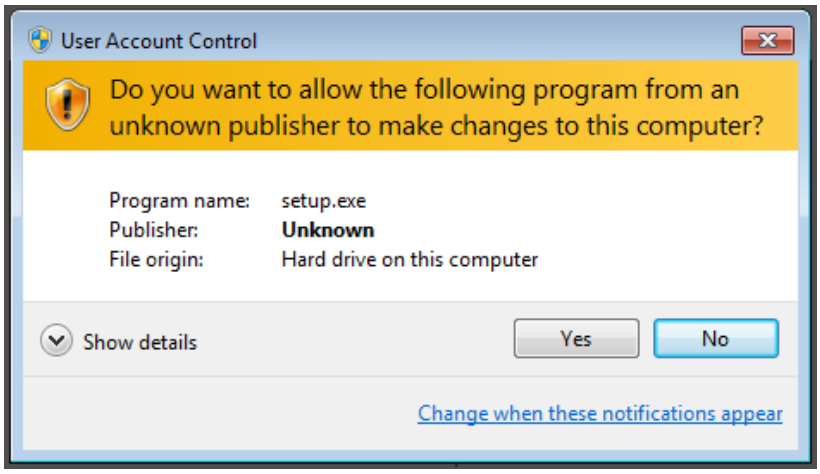
4. Continue to **“Run the Installation” on page 5.**

Run the Installation

1. Select the **Language** and then click **OK**.

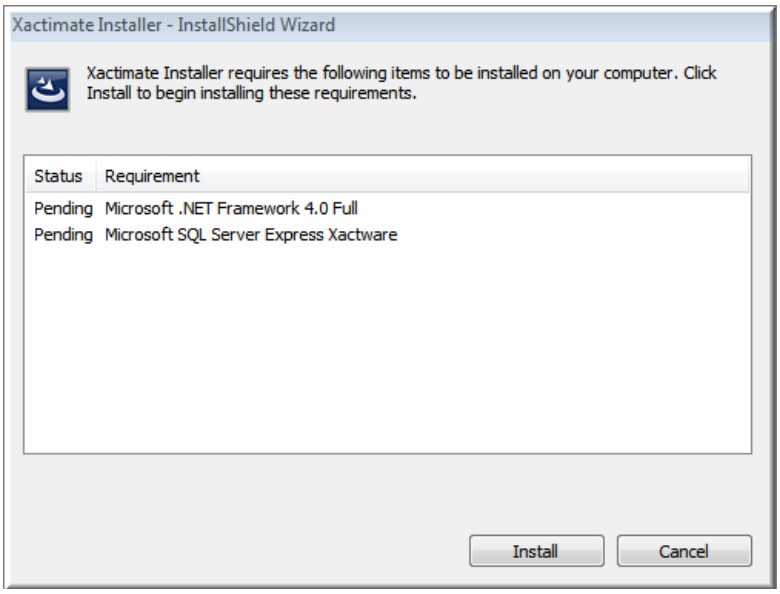


Note: *You may be prompted to allow the setup;* click **Yes**.



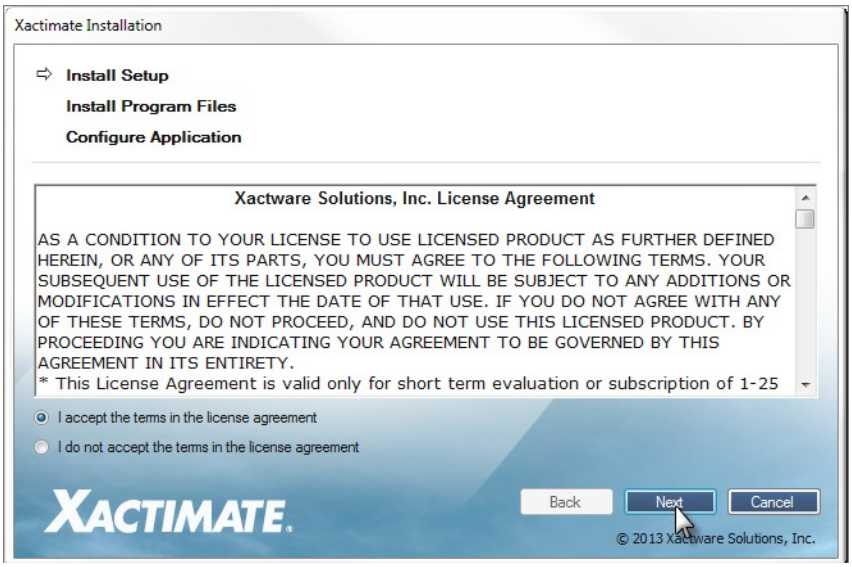
An InstallShield Wizard informs you that Xactimate requires certain programs to run correctly.

2. Click **Install**.

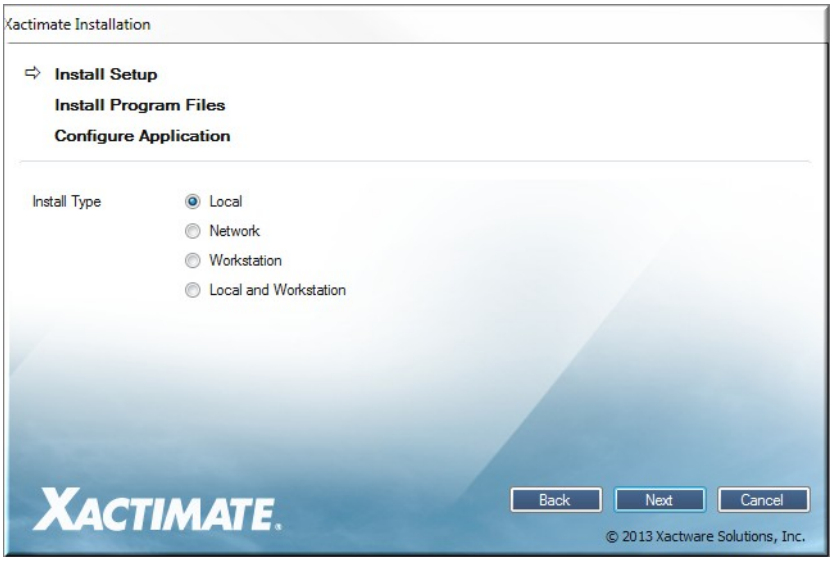


Note: *These Microsoft applications are required to run Xactimate. If the required applications already exist on your computer, the dialog boxes do not appear; continue to* ***step 3.***

3. After reviewing the License Agreement, and if you agree, click **I accept the terms in the license agreement**, and then click **Next**.



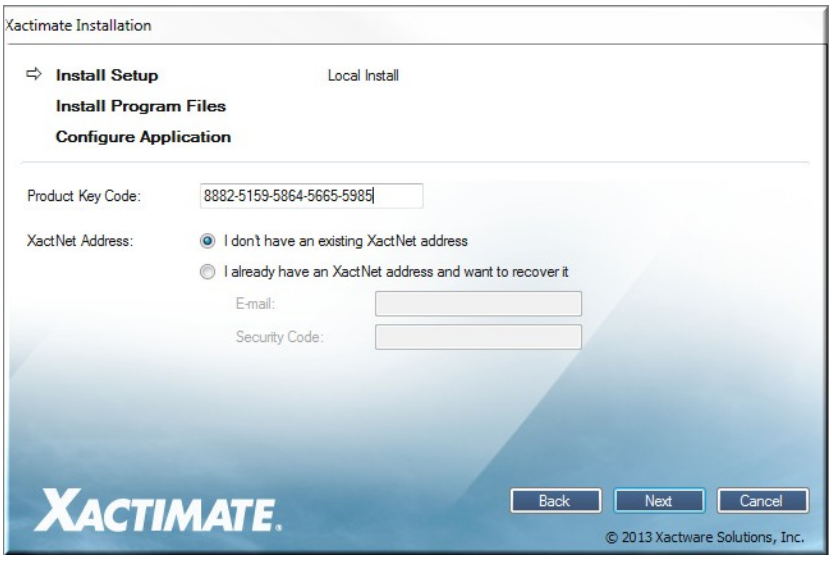
The Install Type dialog box appears.



4. Select your **Installation Type** and click **Next**.

The Product Key Code dialog box appears.

5. Type the **20-character Product Key Code.** If you are upgrading to Xactimate 28, the Product Key Code is the same one you received for your previous version. If you are installing a new subscription, your Product Key Code is in the email you received from the Xactware.com Shopping Cart if you purchased online or from Xactware Sales if you purchased by phone. If you are installing from a DVD, your product key code is printed on the DVD packaging.



6. On the XactNet Address, select **one** of the following:

- If you need a new XactNet address, choose **I don't have an existing XactNet address.**

  By selecting this option, you can create an XactNet address in Xactimate after installation.

- If you have an existing XactNet address, choose **I already have an XactNet address and want to recover it,** and then follow these steps:

  i. Type the **e-mail address** that was used previously to register with XactAnalysis.

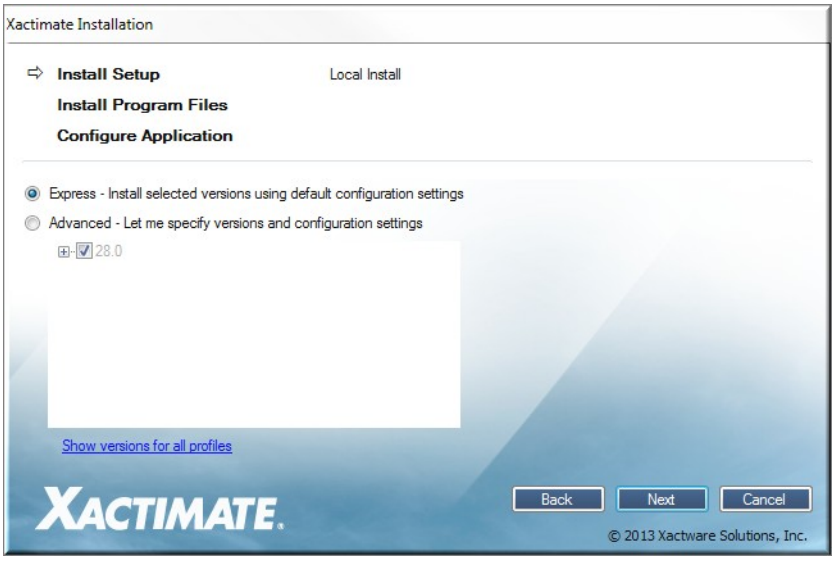
  ii. Click the **Request an e-mail with Security Codes**.

  Within a few minutes, Xactware sends a message to the e-mail address you entered. This e-mail message contains a security code.

  iii. Type (or paste) the **security code** into the appropriate box.

7. Click **Next**.

The Xactimate Installation dialog box appears.

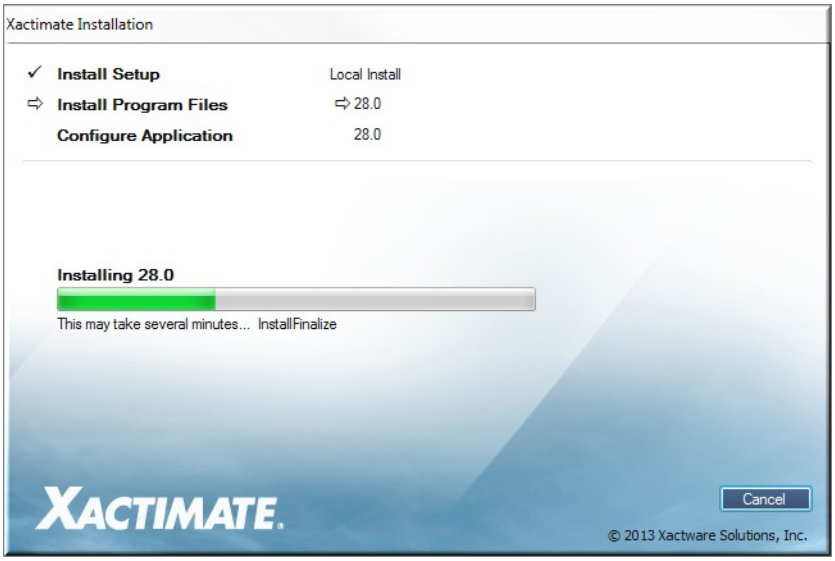


8. On the Xactimate Installation dialog box, select **one** of the following:

- **Express** to install all versions of Xactimate needed to work with the profiles on your Key Code.
- **Advanced** to manually select the Profiles you wish to install.

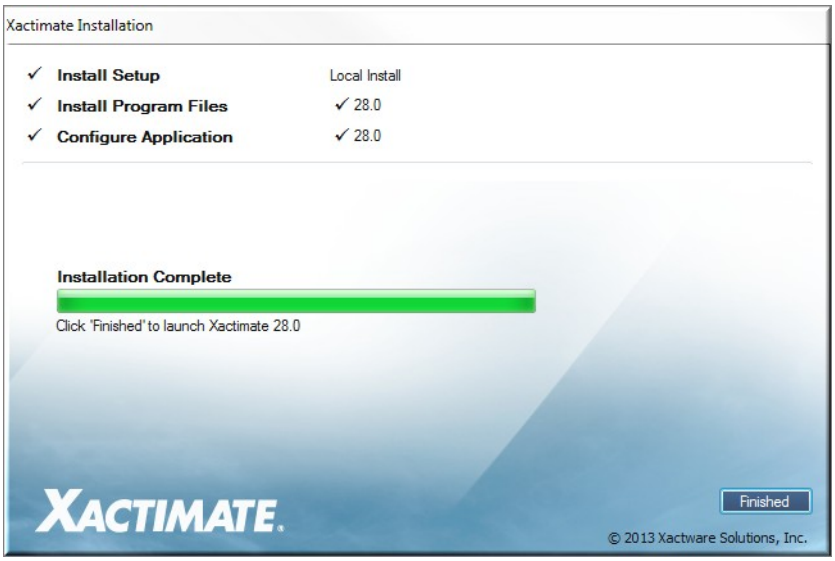
9. Click **Next**.

A progress installation bar appears.



Note: *The installation takes several minutes;* ***do not*** *cancel the installation while the configuration is running.*

10. Once the configuration is complete, click **Finished.**



Congratulations. You have successfully installed Xactimate version 28.

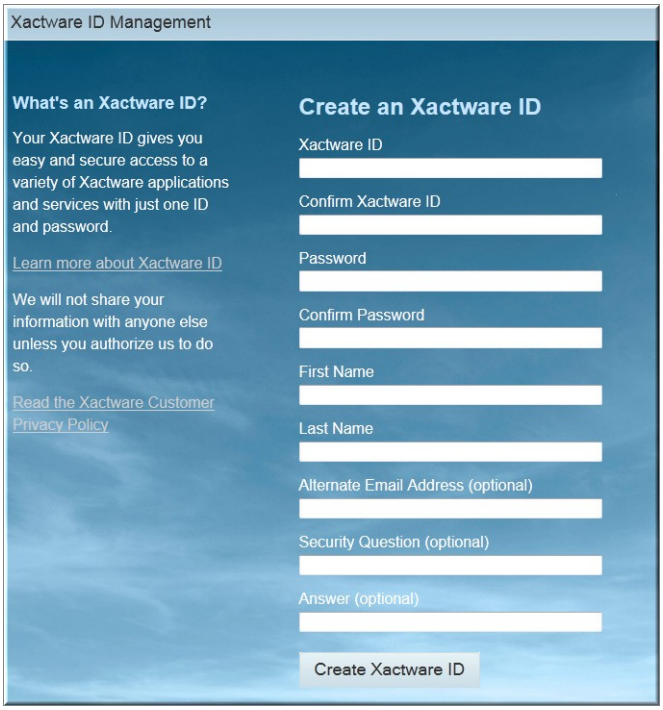
You are now ready to begin using Xactimate.

11.Type your Xactware ID and Password, and then click OK

GET AN XACTWARE ID

1. On the Xactimate login page, click **Get an Xactware ID**.

A browser window opens to the Xactware ID Management page.



2. Type in the required **information**.

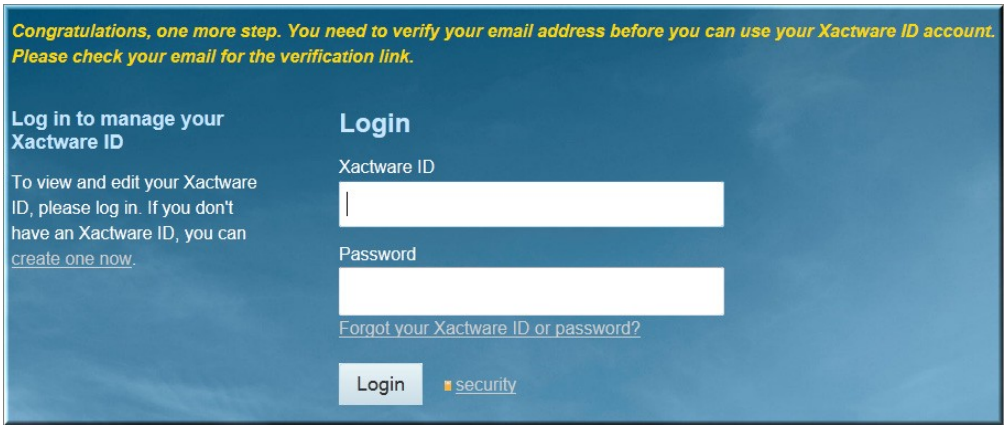
- Xactware ID must be a **valid e-mail address**.
- Password requirements:

- Must be at least eight characters long.
- Must have at least one letter upper or lower case.
- Must have at least one number.
- Must be different than the Xactware ID.

- Type in your **first** and **last name**.
- Alternate e-mail address and security question is optional.

3. Click **Create Xactware ID.**

The following message appears.



4. Go to your e-mail and open the **XID** e-mail**.**

5. To verify your account, click the provided **link** in the e-mail message.

6. On the Xactimate login dialog box, type in your **Xactware ID** and **Password**.

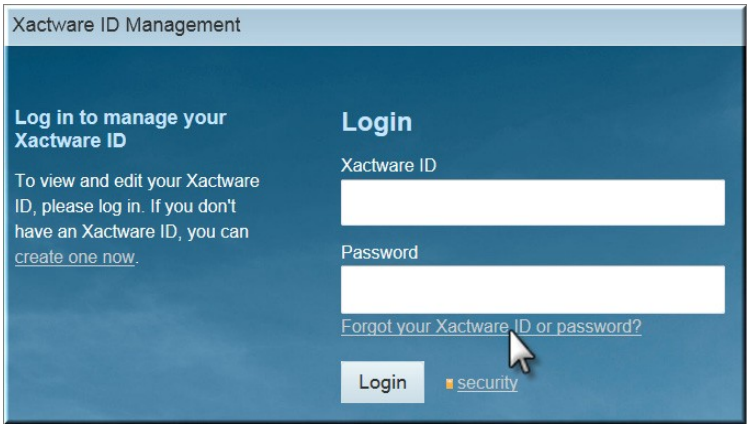
7. Click **OK**.

Xactimate version 28.0 opens to the Control Center Dashboard.

Forgot your Xactware Password

1. On the Xactimate login page, click **Forgot your Xactware ID or password?**

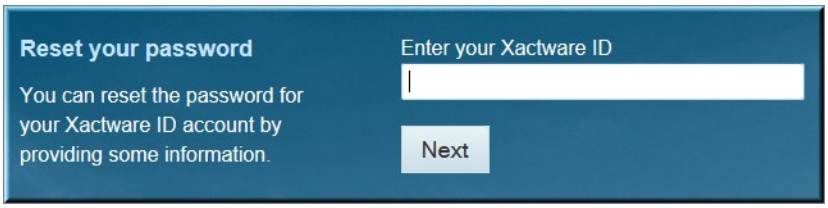
A browser window opens to the Xactware ID Management page.



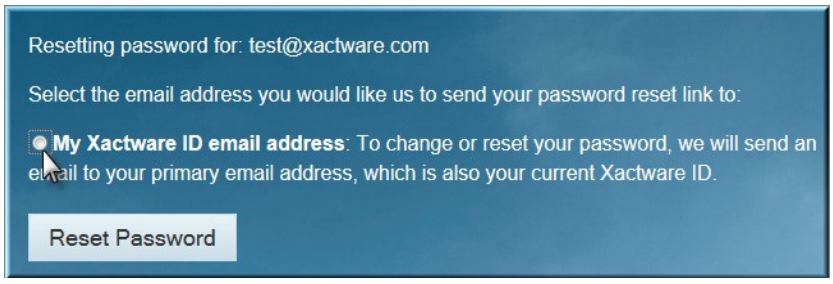
2. To obtain your password, do one of the following:

- Click **Forgot your Xactware ID or password.**

i. Type your **Xactware ID** (i.e. your email address), and then click **Next**.



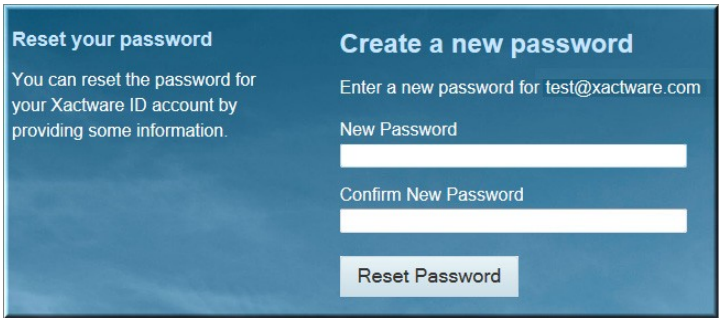
ii. Click **My Xactware ID email address**, and then click **Reset Password**.



An email is sent to your Xactware ID email address.

iii. Open the **email** and click the provided **link** to reset your password.

iv. On the Create a new password form, type in your new **password** and **retype** to confirm.



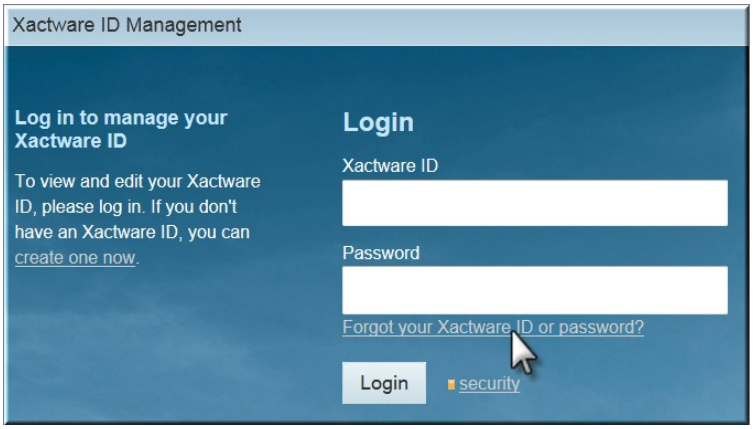
v. Click **Reset Password**.

3. Go to the **Xactimate login** screen and enter in your **user name** and new **password**.

FORGOT YOUR XACTWARE ID

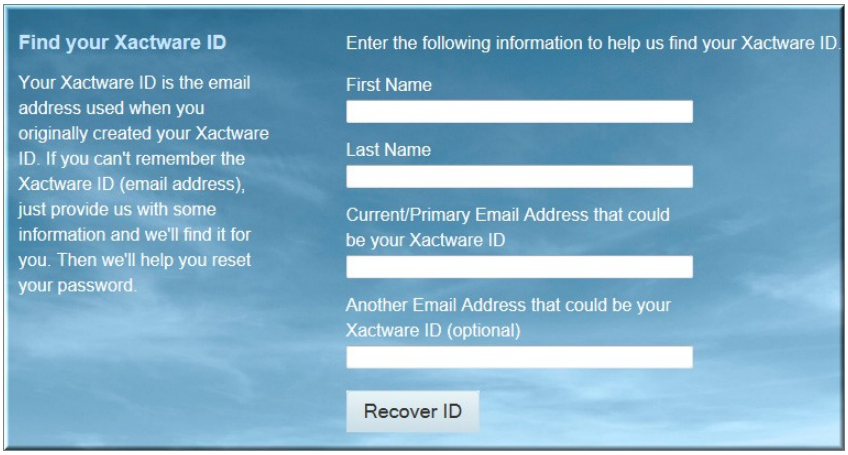
1. On the Xactimate login page, click **Forgot your Xactware ID or password?**

A browser window opens to the Xactware ID Management page.



2. Click **Forgot your Xactware ID or password.**

3. On the Xactware ID Management page, to find your Xactware ID, type in the **required information.**



4. Click **Recover ID**.

If the information entered matches our records, the Xactware ID is returned and appears on the screen.

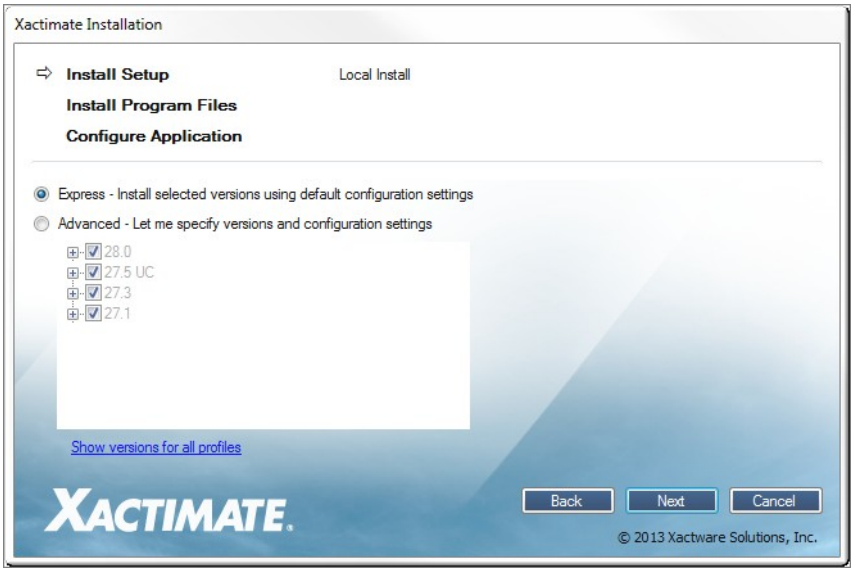
If the information entered does not match our records, contact support (1-800-710-9228) for further assistance.

NEW MULTI-VERSION INSTALL

If you do not have Xactimate installed on your computer, and you are an Xactimate Professional subscriber who wants to run multiple versions, these instructions assist you in installing version 28.0, plus addition versions of Xactimate.

1. Follow steps **1 - 6** of “Run the Installation” on page 5.
2. Click **Next**.

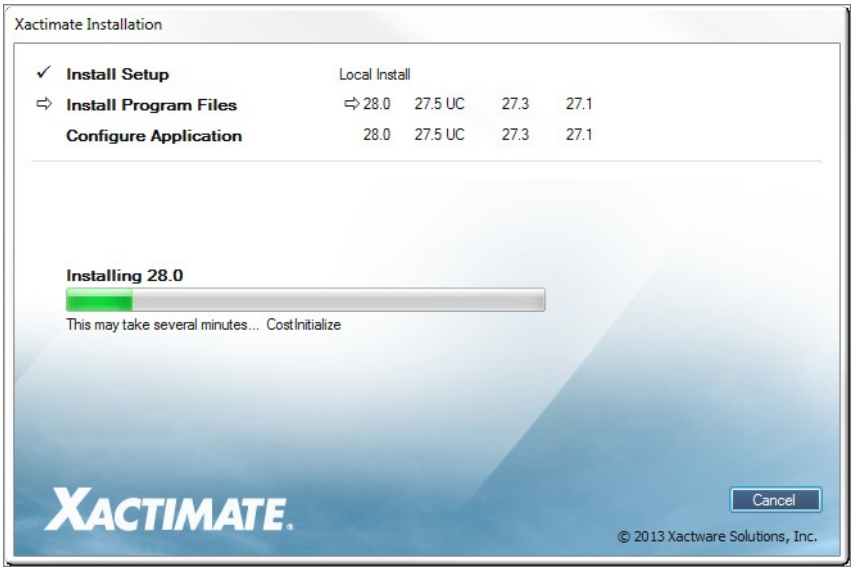
   The Xactimate Installation dialog box appears.



3. On the Xactimate Installation dialog box, select **one** of the following:
   - **Express** to install all versions of Xactimate needed to work with the profiles on your Key Code.
   - **Advanced** to manually select the Profiles you wish to install.

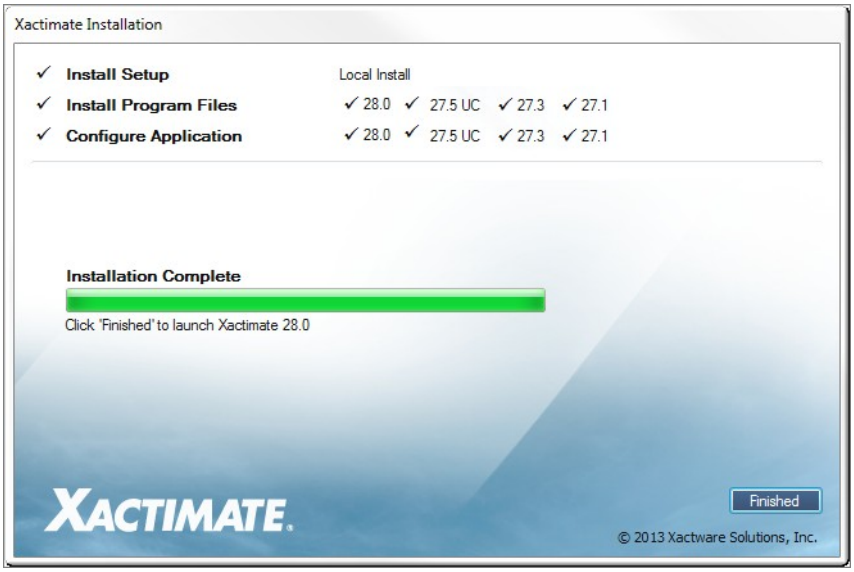
4. Click **Next**.

A progress installation bar appears.



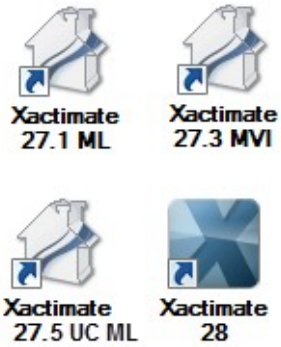
Note: *The installation takes several minutes;* ***do not*** *cancel the installation while the configuration is running.*

5. Once the configuration is complete, click **Finished.**



Congratulations. You have successfully installed Xactimate version 28.

Multiple icons are placed on your desktop with the version specified.



6. To open Xactimate, click one of the **Xactimate icons**.

The Login dialog box appears.

Add a Multi-Version Install

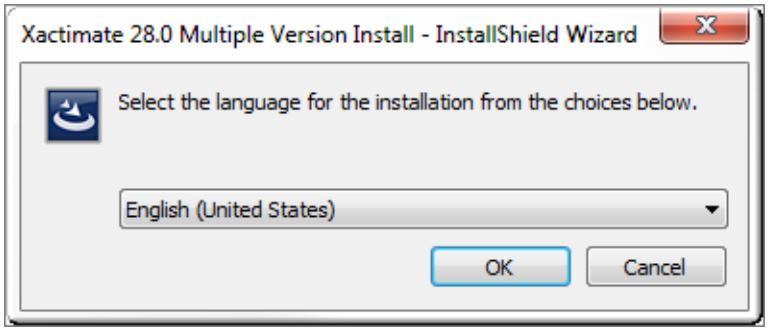
You must be an Xactimate Professional subscriber to add a multi-version install.

When installing the Multi-License install, you most likely have an older version of Xactimate and need to update to a more recent version. To do this, you would first run the update to obtain the most recent version, then run the multi-install which includes older versions of Xactimate. For the example provided below, version 28.0 is installed on the computer and then the multi-license versions are installed, which include versions 27.0, 27.1, 27.3, & 27.5UC.

1. Make sure you have an active connection to the Internet.
2. On your computer's disc drive, insert the **Xactimate DVD** or **run the download.**

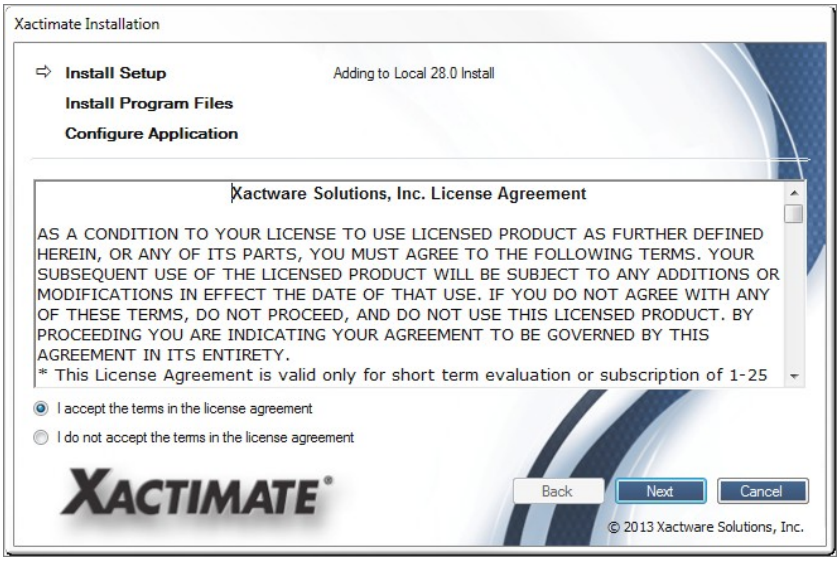
   The installation procedure should begin automatically. If the Xactimate setup does not begin immediately, follow step 2 from "New Install of Xactimate" on page 3.

   The Xactimate Installer - InstallShield Wizard appears.



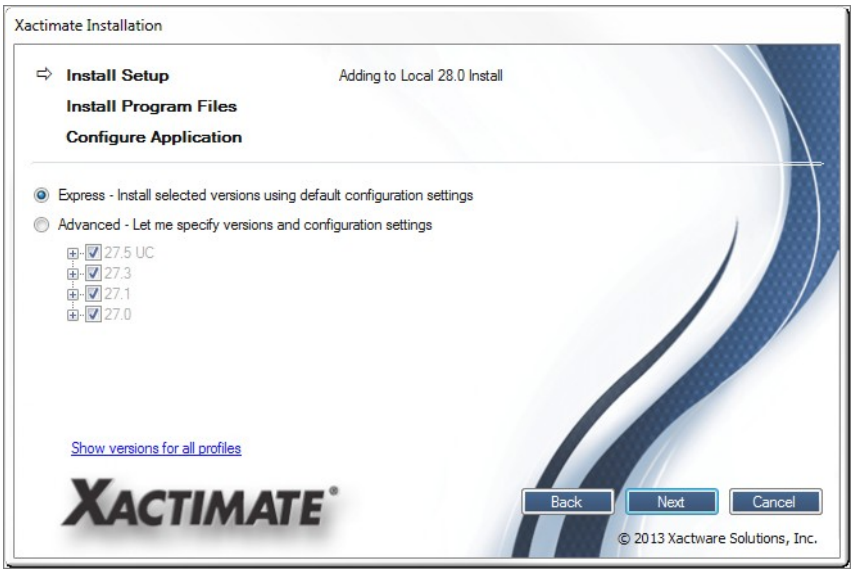
3. Select the **language** for the install, and then click **OK**.

   The License Agreement appears.



4. After reviewing the License Agreement, click "*I accept the terms of the license agreement*", and then click **Next**.

The Xactimate Installation dialog box appears.



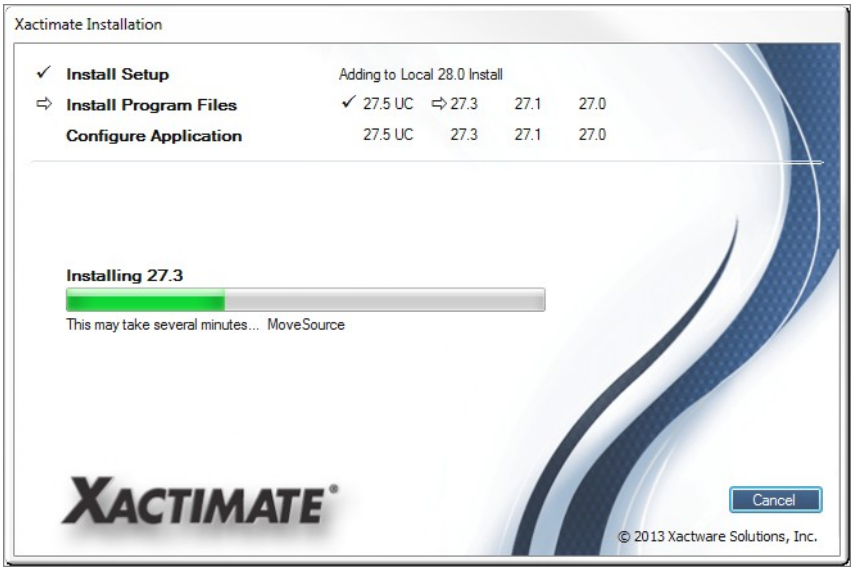
5. Select one of the following:

- **Express** button to install all versions of Xactimate needed to work with the profiles on your Product Key Code.
- **Advanced** button to manually select the Xactimate version(s) you wish to install.

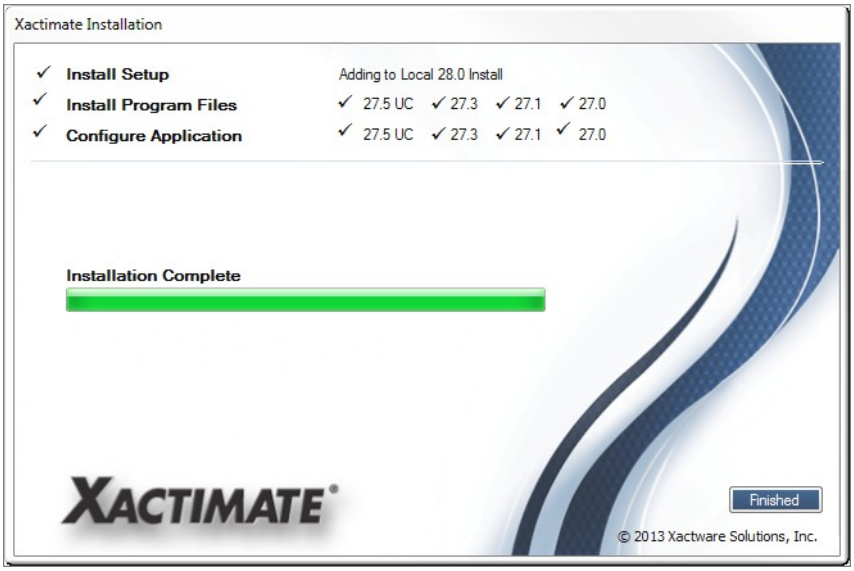
6. Click **Next**.

The installation process begins.

A progress bar shows you the status of the installation. This takes several minutes; **do not** cancel the installation while the configuration is running.

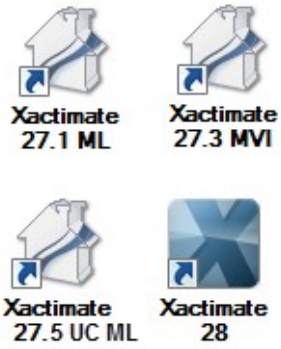


As each version is installed, a check mark is located next to the version number; an arrow indicates which version is currently being installed.



7. Once the configuration completes, click **Finished**.

Multiple icons are placed on your desktop with the version specified.



8. To open Xactimate, click one of the versions of Xactimate.

The Login dialog box appears.

UPGRADING FROM XACTIMATE V.27.5UC TO XACTIMATE V.28.0

If you are upgrading from Xactimate v.27.5 to Xactimate v.28.0, Xactimate automatically creates a backup of any important Xactimate v.27.5UC data by using the Data Transfer backup feature during the update.

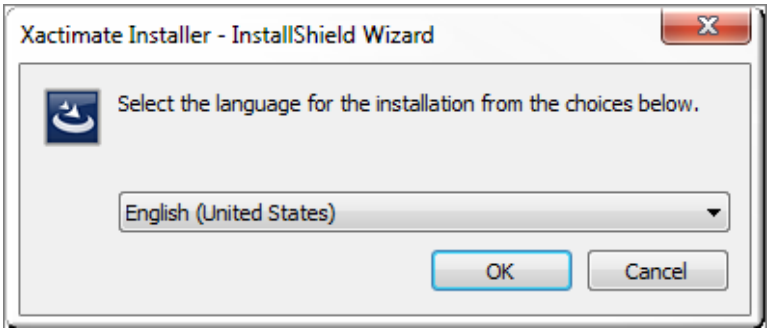
1. Make sure you have an active connection to the Internet.

- Setup should start automatically when the DVD is inserted, or by download and clicking Run. If not, follow the instructions in “New Install of Xactimate” on page 3, starting with **Step 2** to begin the install.

Note: *You may be prompted to allow the setup, select **Yes**.*

The Xactimate Install Wrapper—InstallShield Wizard appears.

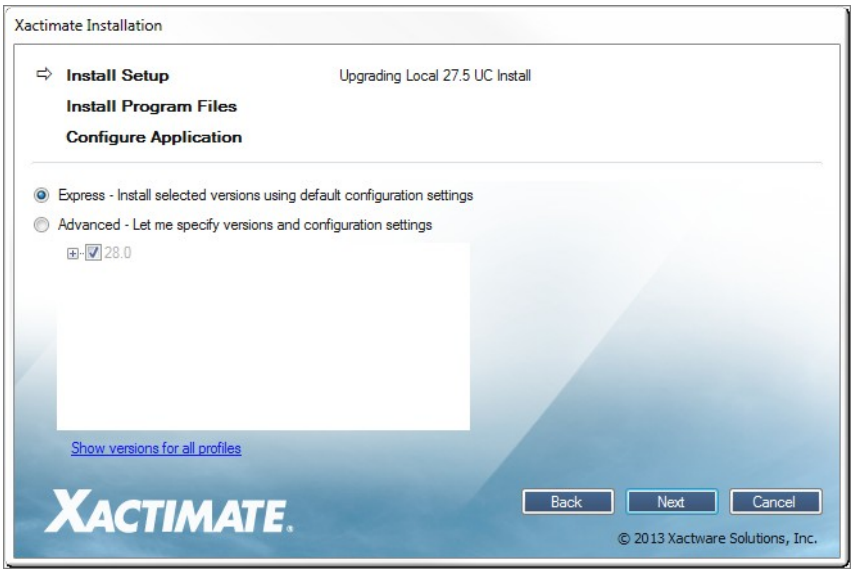
2. Select the **language** for the install, and then click **OK**.



The License Agreement appears.

3. After reviewing the License Agreement, and if you agree, click **I accept the terms in the license agreement**, and then click **Next**.

The Xactimate Install Setup appears.



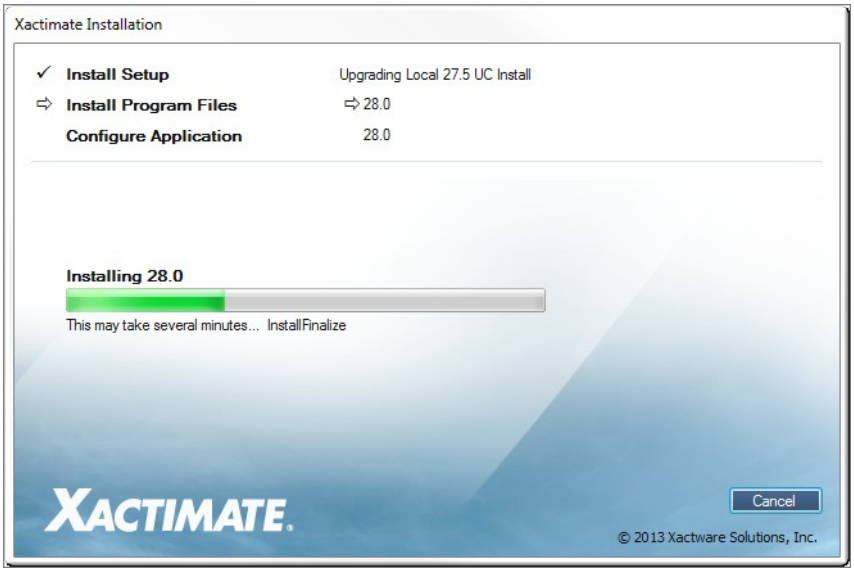
4. In the Xactimate Installation screen, select **one** of the following:

- **Express** to install all versions of Xactimate needed to work with the profiles on your Key Code
- **Advanced** to manually select the versions of Xactimate to install

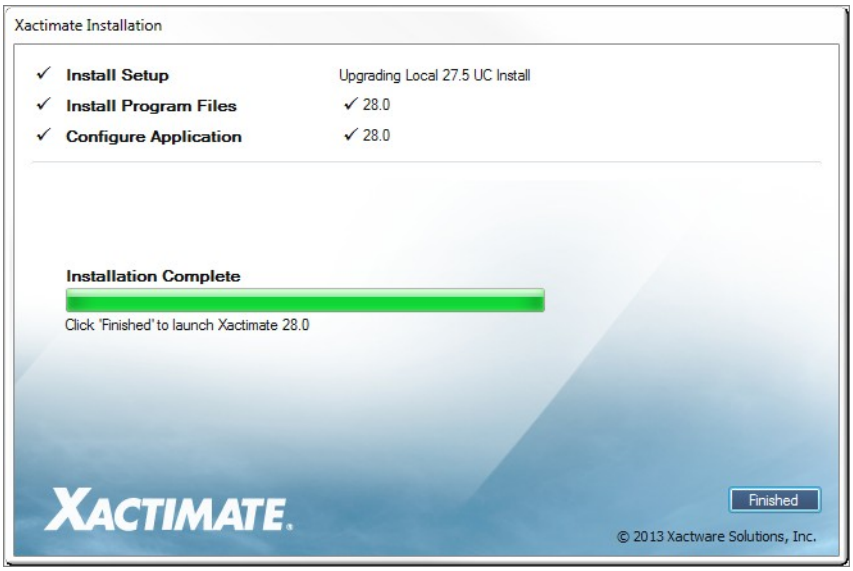
5. Click **Next**.

The upgrading process begins.

A progress bar shows you the progress of the upgrade. This may take several minutes; ***do not*** cancel the installation while the configuration is running.



6. Once the configuration is complete, click **Finished** to launch Xactimate version 28.



The Xactimate Login dialog box appears.

Congratulations. You have successfully upgraded to Xactimate version 28.

You're now ready to begin using Xactimate.

Note: *Your login and password for version 27.5UC will not work for v28.0. To create a User Name and Password for v28.0, follow the steps outlined in this section:* ***"Get an Xactware ID" on page 11****.*