

# Migrating to the new version of Xactimate desktop (X1)

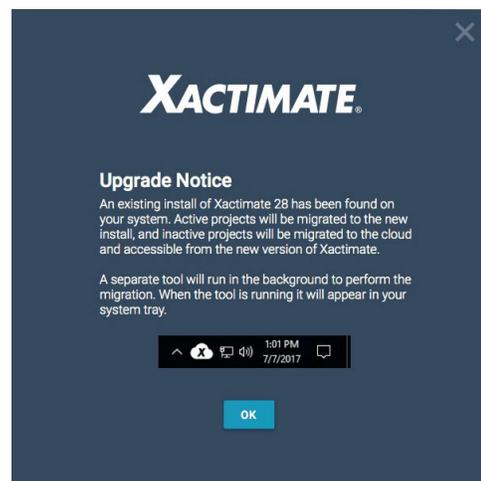
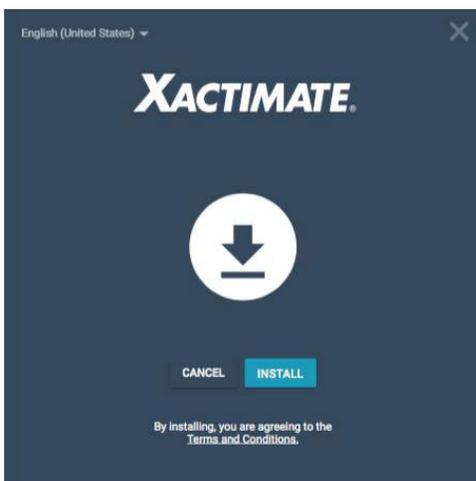
The new version of Xactimate desktop (X1) simplifies and streamlines the upgrade and migration processes while still providing sufficient flexibility to accommodate all upgrade scenarios. The new version minimizes user input during the installation and securely backs up data to the cloud. This document guides you through the process of upgrading Xactimate and migrating data from Xactimate 28 to X1.

## Upgrading from a local installation of Xactimate 28

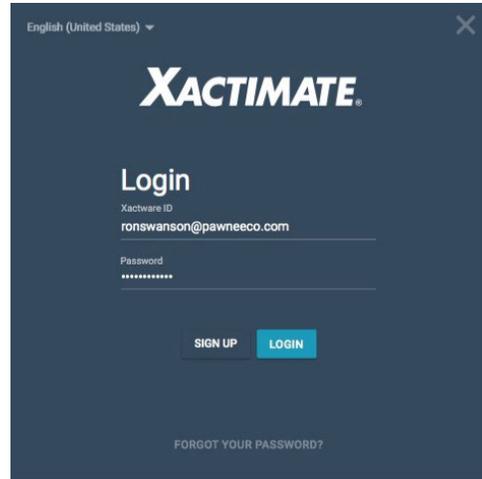
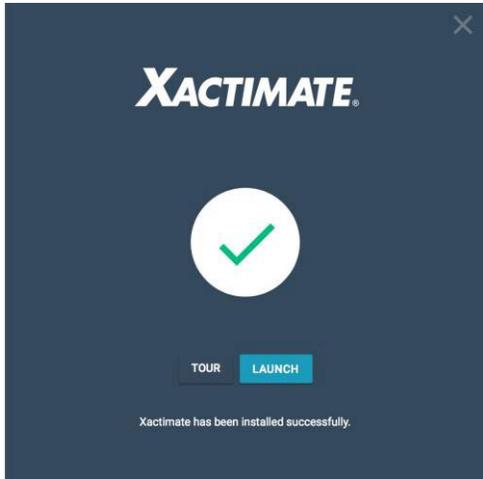
The basic upgrade scenario involves a user with a local installation of Xactimate 28 who has only been added to a single Xactimate online instance. This user simply installs the new version, enters their Xactware ID on the login screen, and selects an Xactimate online instance. No additional user input is required; X1 automatically connects to the cloud and inherits all information required for the configuration process from the Xactimate online instance. Once this connection is established, all data is migrated to the cloud and made available in X1.

## Installation

When the user begins installing X1 they are notified that Xactimate 28 has been detected on their system and that their data will be migrated to the new version. Xactimate 28 is uninstalled from the user's machine during the upgrade to X1.



Following installation, and after logging into X1, the migration tool begins running in the background. An icon appears in the Windows system tray indicating that data is being transferred to X1.

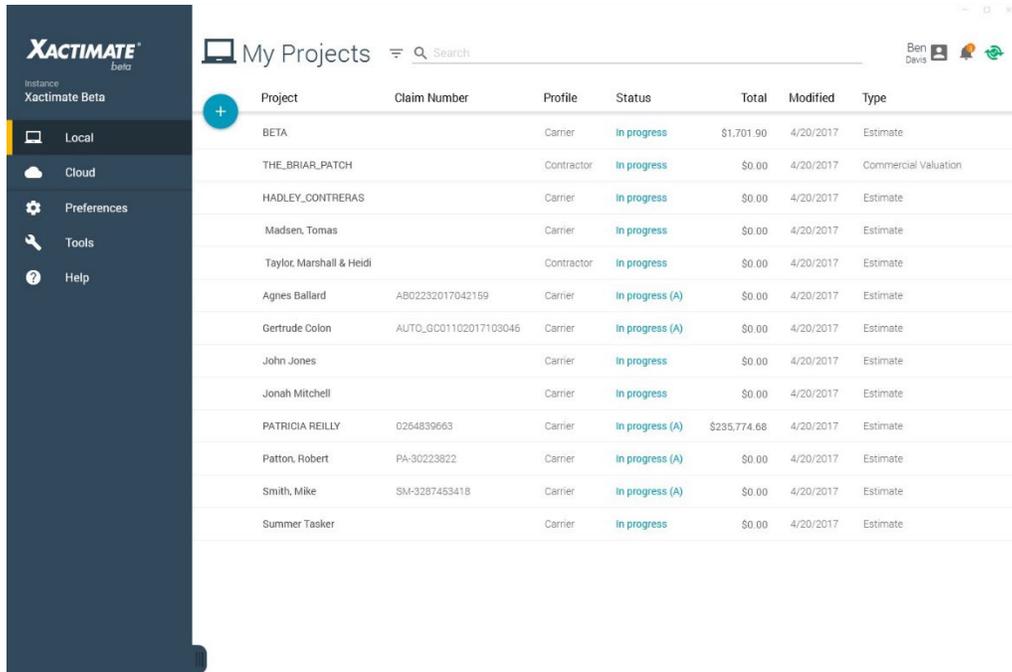


## Project migration

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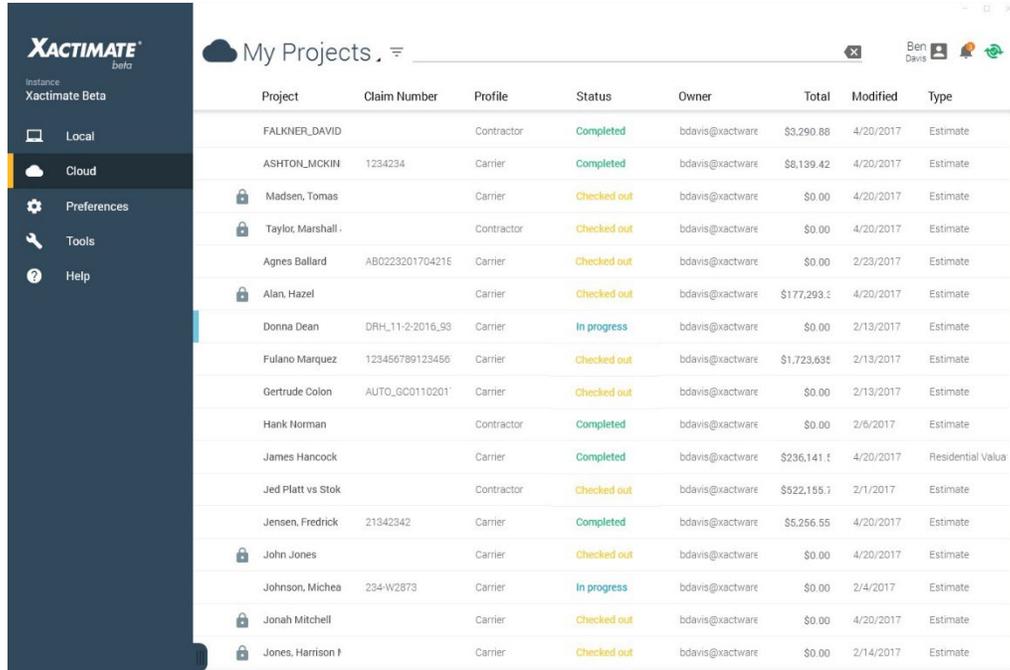
There are three different stages for migrating projects from Xactimate 28 depending on the status and recent activity of each project. Projects that have an In Progress status, and have been modified in the previous 90 days, are considered active. All projects that have not been modified recently or that are in a completed state are considered inactive. User data, and any project that cannot be uploaded to the online instance, is considered an archived item.

The first stage in the migration process moves active projects directly to X1, allowing the user to continue working in the new application. During this first stage, a copy of each active project is synced to the user's Xactimate online instance. The projects appear in the user's Local projects list as they migrate.



Project	Claim Number	Profile	Status	Total	Modified	Type
BETA		Carrier	In progress	\$1,701.90	4/20/2017	Estimate
THE_BRIAR_PATCH		Contractor	In progress	\$0.00	4/20/2017	Commercial Valuation
HADLEY_CONTRERAS		Carrier	In progress	\$0.00	4/20/2017	Estimate
Madsen, Tomas		Carrier	In progress	\$0.00	4/20/2017	Estimate
Taylor, Marshall & Heidi		Contractor	In progress	\$0.00	4/20/2017	Estimate
Agnes Ballard	AB02232017042159	Carrier	In progress (A)	\$0.00	4/20/2017	Estimate
Gertrude Colon	AUTO_GCD1102017103046	Carrier	In progress (A)	\$0.00	4/20/2017	Estimate
John Jones		Carrier	In progress	\$0.00	4/20/2017	Estimate
Jonah Mitchell		Carrier	In progress	\$0.00	4/20/2017	Estimate
PATRICIA REILLY	0264839663	Carrier	In progress (A)	\$235,774.68	4/20/2017	Estimate
Patton, Robert	PA-30223822	Carrier	In progress (A)	\$0.00	4/20/2017	Estimate
Smith, Mike	SM-3287453418	Carrier	In progress (A)	\$0.00	4/20/2017	Estimate
Summer Tasker		Carrier	In progress	\$0.00	4/20/2017	Estimate

In the second stage, the migration tool begins uploading inactive projects to the user's Xactimate online instance. After the inactive projects have been uploaded, they appear in the Cloud projects list. Sending inactive projects to the cloud improves application performance, minimizes the number of estimates cluttering the Local list, and allows the user to focus on their active projects.

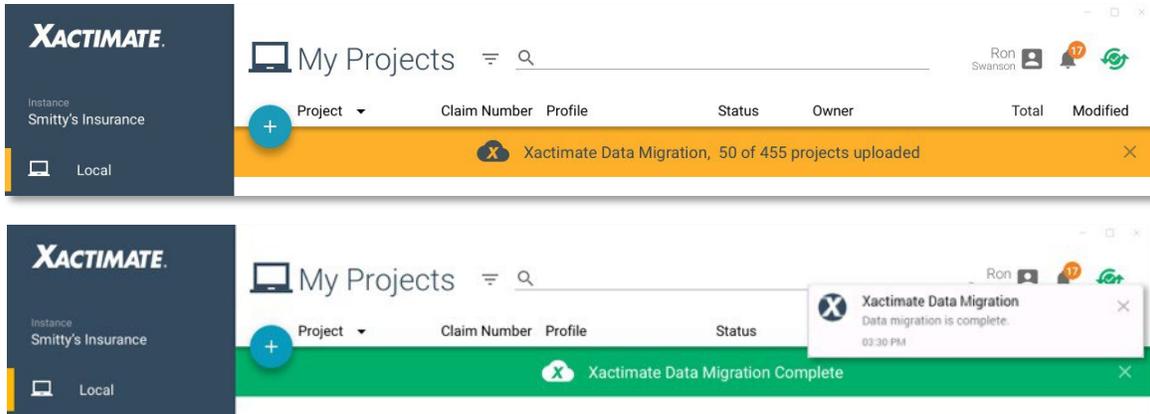


Project	Claim Number	Profile	Status	Owner	Total	Modified	Type
FALKNER, DAVID		Contractor	Completed	bdavis@xactware	\$3,290.88	4/20/2017	Estimate
ASHTON, MCKIN	1234234	Carrier	Completed	bdavis@xactware	\$8,139.42	4/20/2017	Estimate
Madsen, Tomas		Carrier	Checked out	bdavis@xactware	\$0.00	4/20/2017	Estimate
Taylor, Marshall		Contractor	Checked out	bdavis@xactware	\$0.00	4/20/2017	Estimate
Agnes Ballard	AB022320170421E	Carrier	Checked out	bdavis@xactware	\$0.00	2/23/2017	Estimate
Alan, Hazel		Carrier	Checked out	bdavis@xactware	\$177,293.1	4/20/2017	Estimate
Donna Dean	DRH_11-2-2016_93	Carrier	In progress	bdavis@xactware	\$0.00	2/13/2017	Estimate
Fulano Marquez	123456789123456	Carrier	Checked out	bdavis@xactware	\$1,723,635	2/13/2017	Estimate
Gertrude Colon	AUTO_G00110201	Carrier	Checked out	bdavis@xactware	\$0.00	2/13/2017	Estimate
Hank Norman		Contractor	Completed	bdavis@xactware	\$0.00	2/6/2017	Estimate
James Hancock		Carrier	Completed	bdavis@xactware	\$236,141.1	4/20/2017	Residential Valua
Jed Platt vs Stok		Contractor	Checked out	bdavis@xactware	\$922,153.1	2/1/2017	Estimate
Jensen, Fredrick	21342342	Carrier	Completed	bdavis@xactware	\$5,256.55	4/20/2017	Estimate
John Jones		Carrier	Checked out	bdavis@xactware	\$0.00	4/20/2017	Estimate
Johnson, Michea	234-W2873	Carrier	In progress	bdavis@xactware	\$0.00	2/4/2017	Estimate
Jonah Mitchell		Carrier	Checked out	bdavis@xactware	\$0.00	4/20/2017	Estimate
Jones, Harrison		Carrier	Checked out	bdavis@xactware	\$0.00	2/14/2017	Estimate

**Note:** If an assignment that already has a record in Xactimate online is migrated to X1 and then synced to the cloud, Xactimate creates a copy of the assignment. This copy keeps its estimate data but receives an amended name and is no longer linked to the project in XactAnalysis.

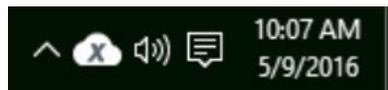
In the third stage, any projects that could not be uploaded to the online instance are exported to the file system archive, allowing the user to access this data as needed. The absence of a profile in the online instance, corrupt estimates, or projects that a user chooses not to upload can result in archiving data in the file system. The user can also choose to archive projects from within the migration tool.

Because most users have no need to open the migration tool, feedback on the progress of migrating data is displayed on a banner in the **Local** and **Cloud** project lists. The banner indicates that data migration is active and displays the amount of data that has been migrated.

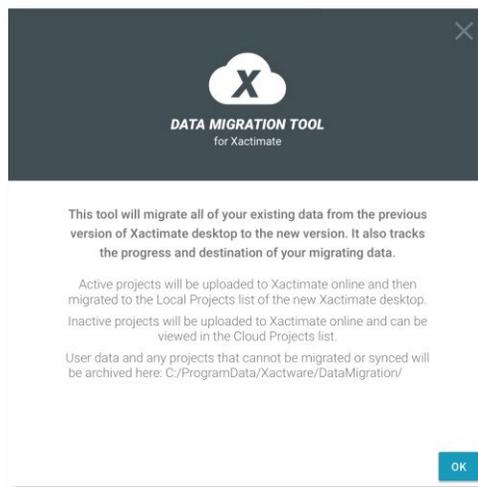


## Migration tool

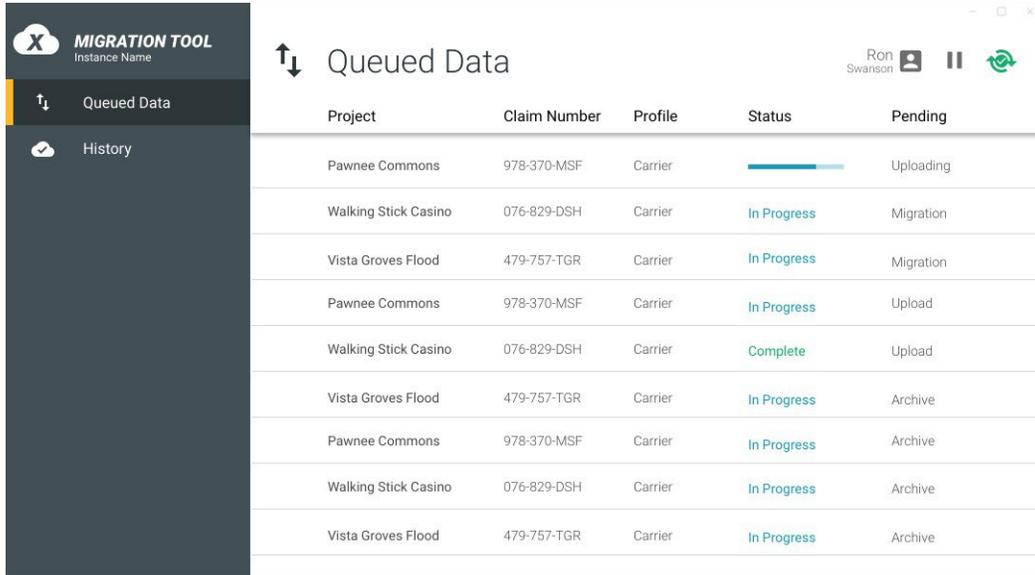
When data migration begins, the migration tool is minimized because user interaction is not required. The user can click the icon in the Windows system tray to display the migration tool and view the progress of the data migration. Each time the user logs into their computer, the migration tool launches. This allows the data upload to continue even when Xactimate is not running and ensures that all projects are migrated and made available in the cloud as quickly as possible. After all data is migrated, uploaded, or archived, the user is informed on the banner and via a notification in Xactimate.



When the user opens the migration tool, a message describes the three different paths for migrating data to the new version of Xactimate, as shown in the image below.

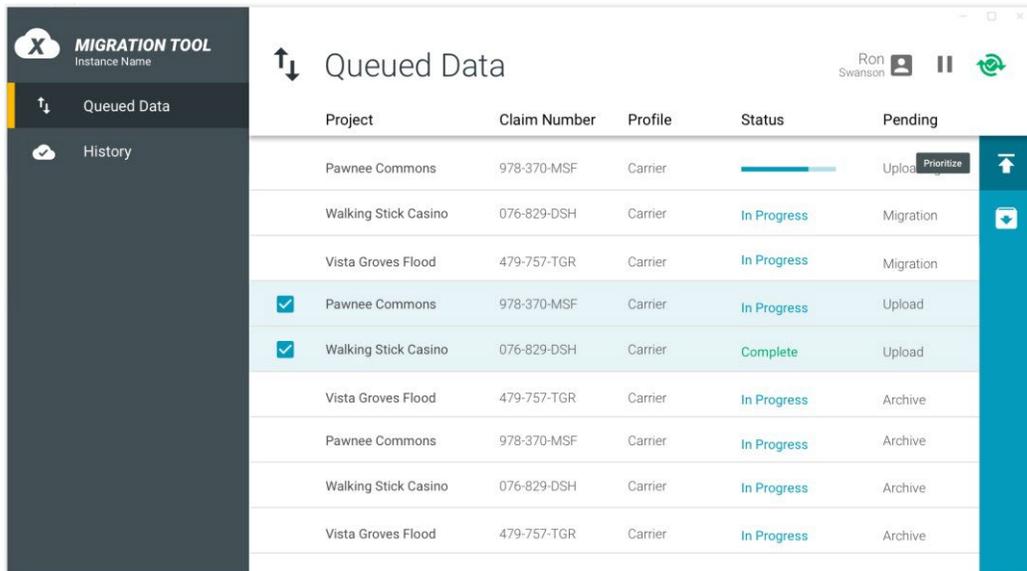


The **Queued Data** screen opens by default and displays a list of projects waiting to be uploaded to the cloud. This list is ordered with the most recently modified projects at the top of the queue and includes active projects (those immediately migrated to X1), as well as inactive projects (those uploaded to the cloud). Projects that cannot be uploaded are displayed as archived items.



Project	Claim Number	Profile	Status	Pending
Pawnee Commons	978-370-MSF	Carrier	<div style="width: 50%;"></div>	Uploading
Walking Stick Casino	076-829-DSH	Carrier	In Progress	Migration
Vista Groves Flood	479-757-TGR	Carrier	In Progress	Migration
Pawnee Commons	978-370-MSF	Carrier	In Progress	Upload
Walking Stick Casino	076-829-DSH	Carrier	Complete	Upload
Vista Groves Flood	479-757-TGR	Carrier	In Progress	Archive
Pawnee Commons	978-370-MSF	Carrier	In Progress	Archive
Walking Stick Casino	076-829-DSH	Carrier	In Progress	Archive
Vista Groves Flood	479-757-TGR	Carrier	In Progress	Archive

If a project in the queue needs to be accessed immediately in Xactimate online or X1, the user can push that project to the top of the upload queue by using the **Prioritize** option.



Project	Claim Number	Profile	Status	Pending
Pawnee Commons	978-370-MSF	Carrier	<div style="width: 50%;"></div>	Upload <b>Prioritize</b>
Walking Stick Casino	076-829-DSH	Carrier	In Progress	Migration
Vista Groves Flood	479-757-TGR	Carrier	In Progress	Migration
<input checked="" type="checkbox"/> Pawnee Commons	978-370-MSF	Carrier	In Progress	Upload
<input checked="" type="checkbox"/> Walking Stick Casino	076-829-DSH	Carrier	Complete	Upload
Vista Groves Flood	479-757-TGR	Carrier	In Progress	Archive
Pawnee Commons	978-370-MSF	Carrier	In Progress	Archive
Walking Stick Casino	076-829-DSH	Carrier	In Progress	Archive
Vista Groves Flood	479-757-TGR	Carrier	In Progress	Archive

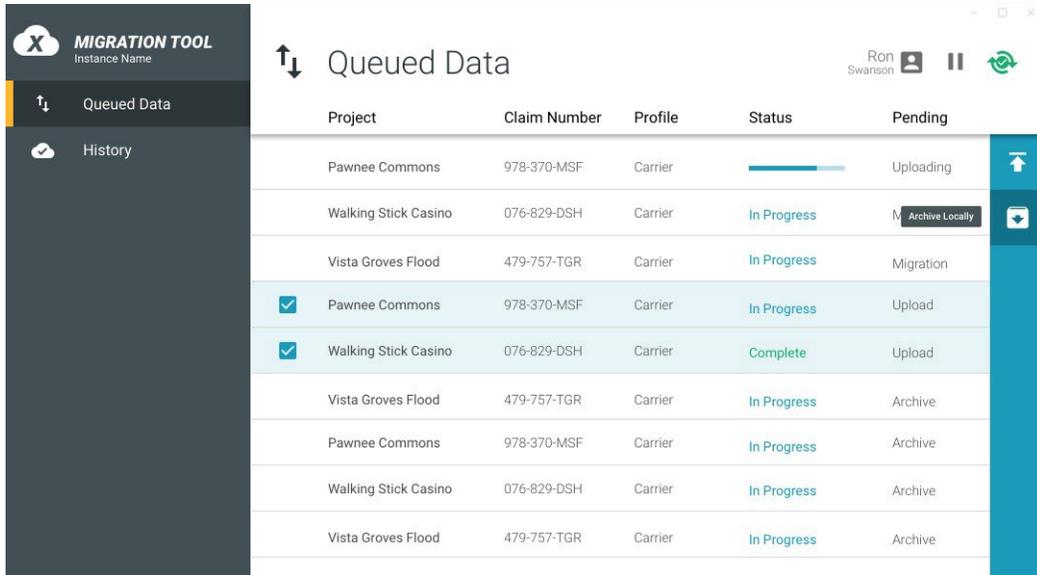
While the migration tool is uploading data to the cloud, it uses some of the bandwidth available through the user's internet connection. However, the tool has been configured with a threshold that prohibits it from consuming all available bandwidth.

If the project's profile does not exist on the selected instance, the project is automatically queued as an archived item and is sent to the local file system. Additionally, the user can choose to archive

any project in the queue that they do not want migrated to X1 or uploaded to the online instance. Projects to be archived are pushed to the bottom of the queue and exported after all other data has been migrated to X1 and synced to the cloud. Users can take advantage of the **Prioritize** option to export selected projects to the file system immediately rather than waiting for all other projects in the queue to be migrated or uploaded.

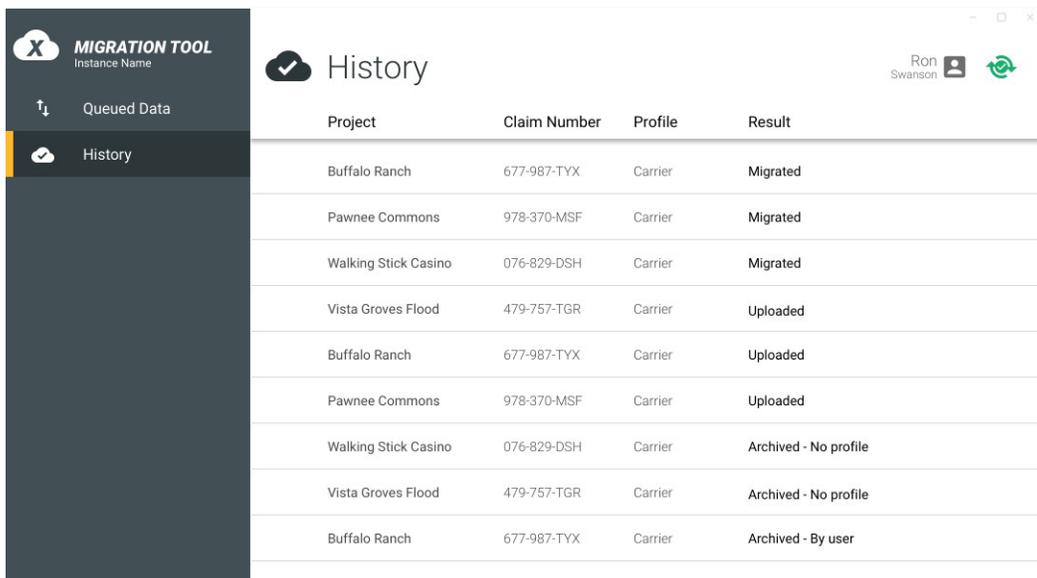
Projects that fail to upload to the cloud for any reason are archived to the following location:

`/ProgramData/Xactware/DataMigration/Archived Projects/`



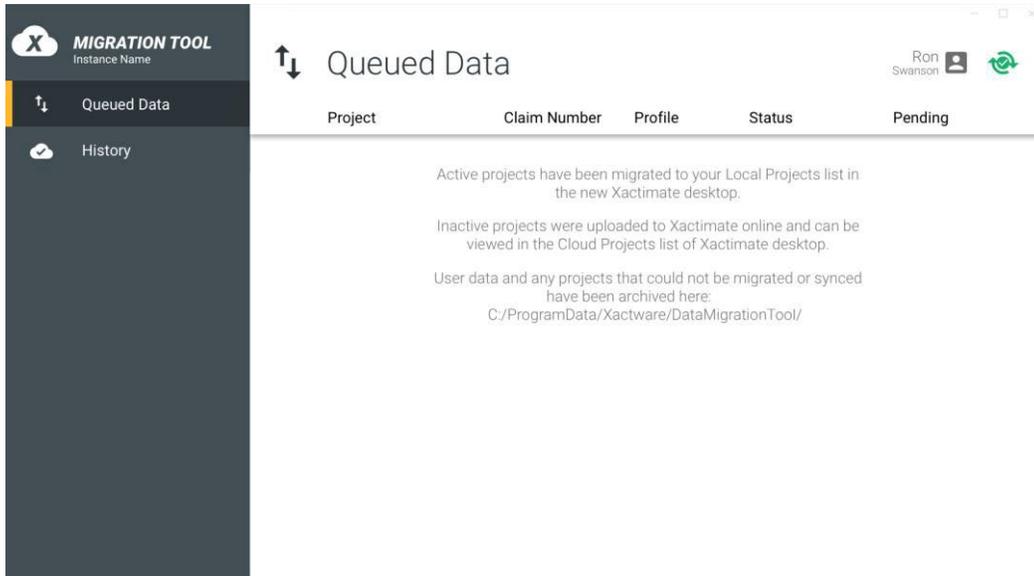
Project	Claim Number	Profile	Status	Pending
Pawnee Commons	978-370-MSF	Carrier	<div style="width: 50%;"></div>	Uploading
Walking Stick Casino	076-829-DSH	Carrier	In Progress	Archive Locally
Vista Groves Flood	479-757-TGR	Carrier	In Progress	Migration
<input checked="" type="checkbox"/> Pawnee Commons	978-370-MSF	Carrier	In Progress	Upload
<input checked="" type="checkbox"/> Walking Stick Casino	076-829-DSH	Carrier	Complete	Upload
Vista Groves Flood	479-757-TGR	Carrier	In Progress	Archive
Pawnee Commons	978-370-MSF	Carrier	In Progress	Archive
Walking Stick Casino	076-829-DSH	Carrier	In Progress	Archive
Vista Groves Flood	479-757-TGR	Carrier	In Progress	Archive

As projects are migrated, they are removed from the **Queued Data** screen and added to the **History** screen. This screen displays all projects that have been successfully uploaded to the online instance (and are accessible in X1) as well as all projects that have been archived to the local file system.



Project	Claim Number	Profile	Result
Buffalo Ranch	677-987-TYX	Carrier	Migrated
Pawnee Commons	978-370-MSF	Carrier	Migrated
Walking Stick Casino	076-829-DSH	Carrier	Migrated
Vista Groves Flood	479-757-TGR	Carrier	Uploaded
Buffalo Ranch	677-987-TYX	Carrier	Uploaded
Pawnee Commons	978-370-MSF	Carrier	Uploaded
Walking Stick Casino	076-829-DSH	Carrier	Archived - No profile
Vista Groves Flood	479-757-TGR	Carrier	Archived - No profile
Buffalo Ranch	677-987-TYX	Carrier	Archived - By user

After all queued data has been uploaded to the online instance, the remaining projects are archived to the local file system. After everything has been migrated, uploaded, or archived, the queue becomes empty and the user is informed that all data has been successfully moved.



## User data migration

In addition to the improved ability to share projects between users, the connection to an Xactimate online instance offers new options for sharing non-project data between users. Certain types of data can be created as either instance data or user data. Instance data is available to all users connected to the instance, but user data is available only to the user that created it. This allows flexibility in accommodating an administrator's need to keep shared data consistent for all users, while still allowing an individual user to create data that meets their own specific needs. Users will see sections for instance data and user data in the list for each data type.

To keep the instance from getting cluttered with duplicate or unnecessary data, the migration process exports all non-estimate data to `C:/ProgramData/Xactware/DataMigration/User Data/`. The user can then select the data they want to import into their local application. Imported data is flagged as user data and is visible only to that user to avoid overwriting instance data created by the administrator and to avoid cluttering other user lists.

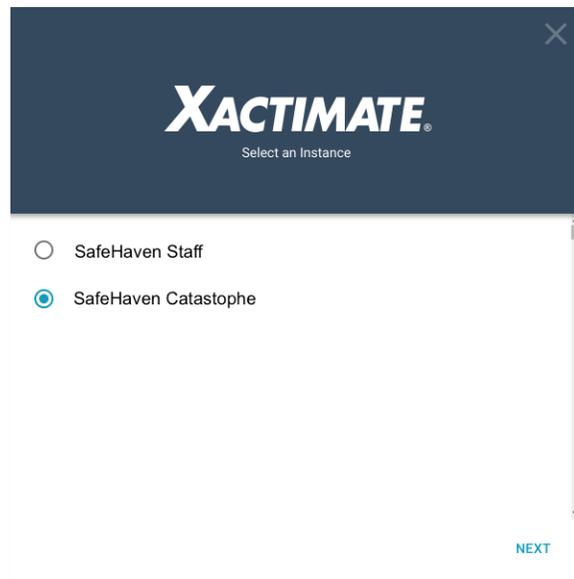
## Other upgrade scenarios

There are some users whose current installation type and instance availability may not meet the typical conditions described previously, so an overview of other upgrade options is provided below.

### Users on more than one instance

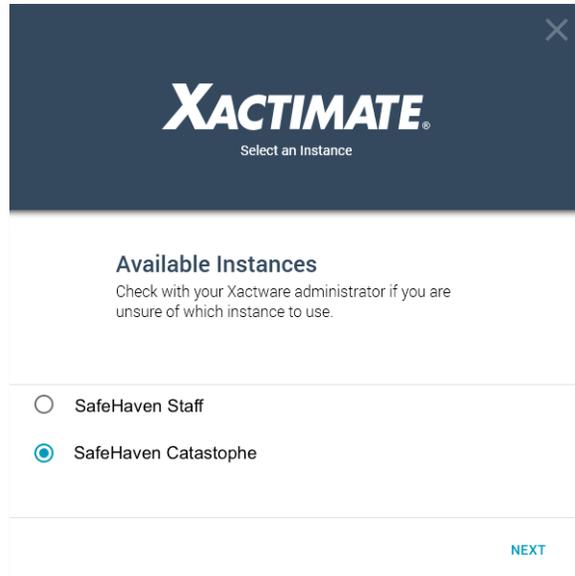
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Users who have been added to more than one instance of Xactimate online are presented with a list of instances they can connect to when logging into X1. The instance selected by the user determines which settings and data are loaded into X1 for that session and which projects are accessible in the Cloud projects list. All data from the previous version is synced to the selected instance when logging into X1.

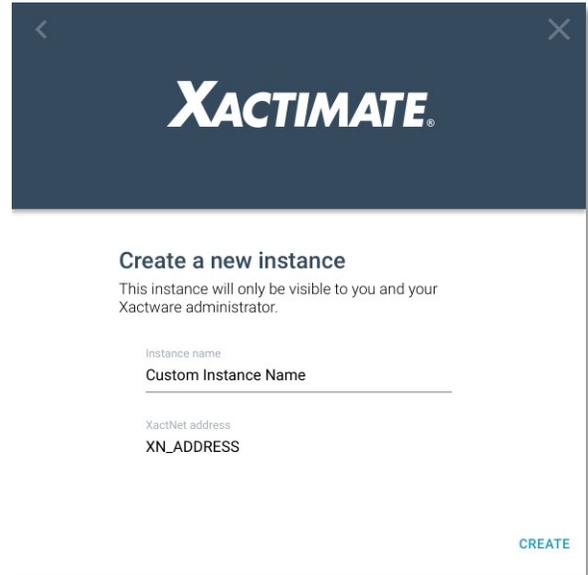
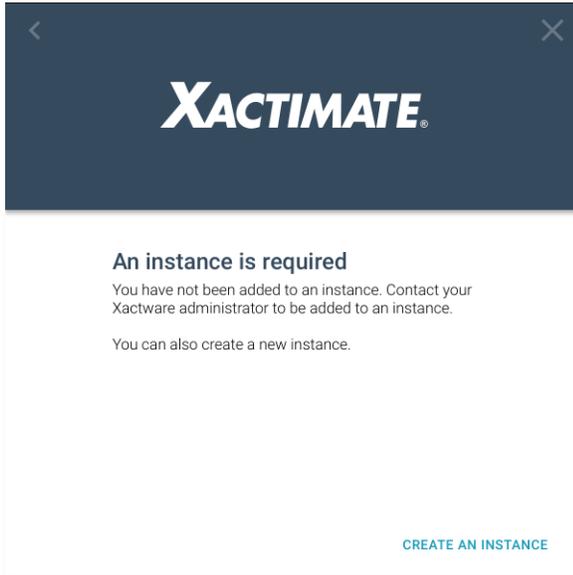


## Users not on an instance

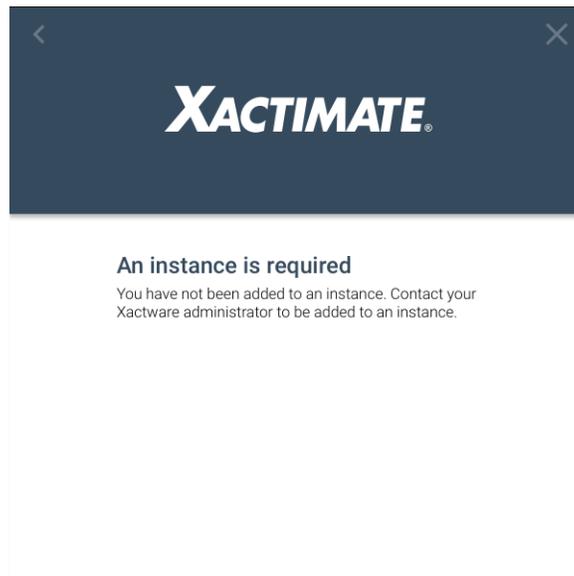
All users must be added to an Xactimate online instance in order to log into X1. Normally, when a user logs into X1, they see a list of Xactimate online instances they have been added to. Rather than displaying an empty list for a user who has not been added to an instance, X1 searches for and displays a list of company instances based on the key code from the Xactimate 28 installation. When the user selects a company instance, they are automatically added to that instance and granted a desktop license, allowing them to log into and begin using X1.



If there are no available instances for the user or the company, the user has the option to create their own instance. The user is prompted to enter an instance name and is informed that their XACT Net address will be transferred from Xactimate 28 to their new Xactimate online instance. The new instance is only visible to the creator and does not facilitate the sharing of data, settings, or projects with other users in their company the same way a shared instance allows.



Companies can work with account managers to disable the option to create a personal instance. This necessitates manually adding users to an instance through the Xactimate Admin tool.





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## Multiple users on a single installation

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Projects for the user performing the upgrade are migrated to X1 and backed-up to the Xactimate online instance selected by the user that first logs in. All other users' projects are uploaded to the instance and can be downloaded to the Local list in their own X1 installations.

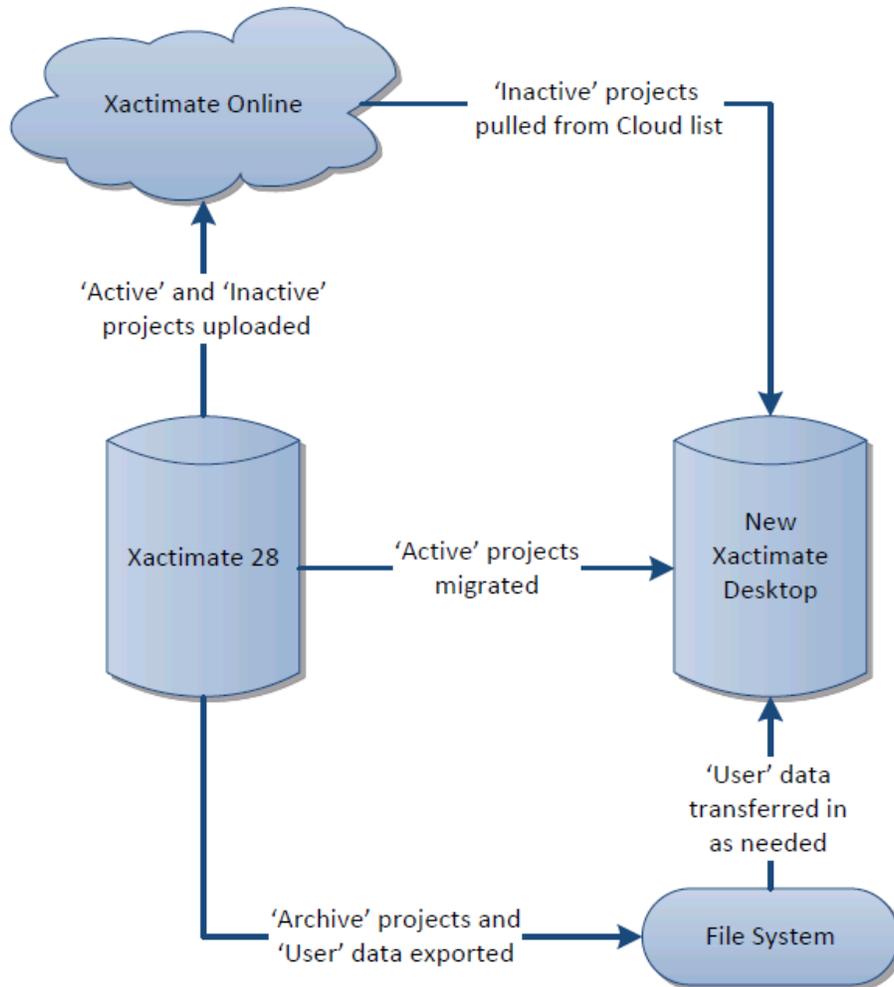
## Network installations

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The new concept of tethering multiple installations of Xactimate desktop to a single set of data in the online instance, which can be accessed by multiple users, is similar to the idea of a network installation. Because existing data is stored in a common network location for an Xactimate 28 network installation, all users' projects begin uploading to the Xactimate online instance when the first workstation installs X1. Because the data migration will already be in progress when any subsequent workstation upgrades to the new version, other users simply install X1 on their own machine, and then have access to projects that have been uploaded to Xactimate online. All user data is archived to the network location of the previous network installation; this ensures that all users can access and import any of the shared data into their new installation as their own user data.

## Upgrade/Migration diagrams

The following diagram illustrates the path for different types of data during the migration process as discussed in this document:



## Process summary

- Active projects are uploaded to the cloud and then migrated to X1.
- Inactive projects are uploaded to the cloud.
- Archive projects and user data are exported to the file system.
- Users can import user data from the file system and download inactive projects from the cloud as needed.