

**Electronic Data Interchange (EDI) Export Guide**

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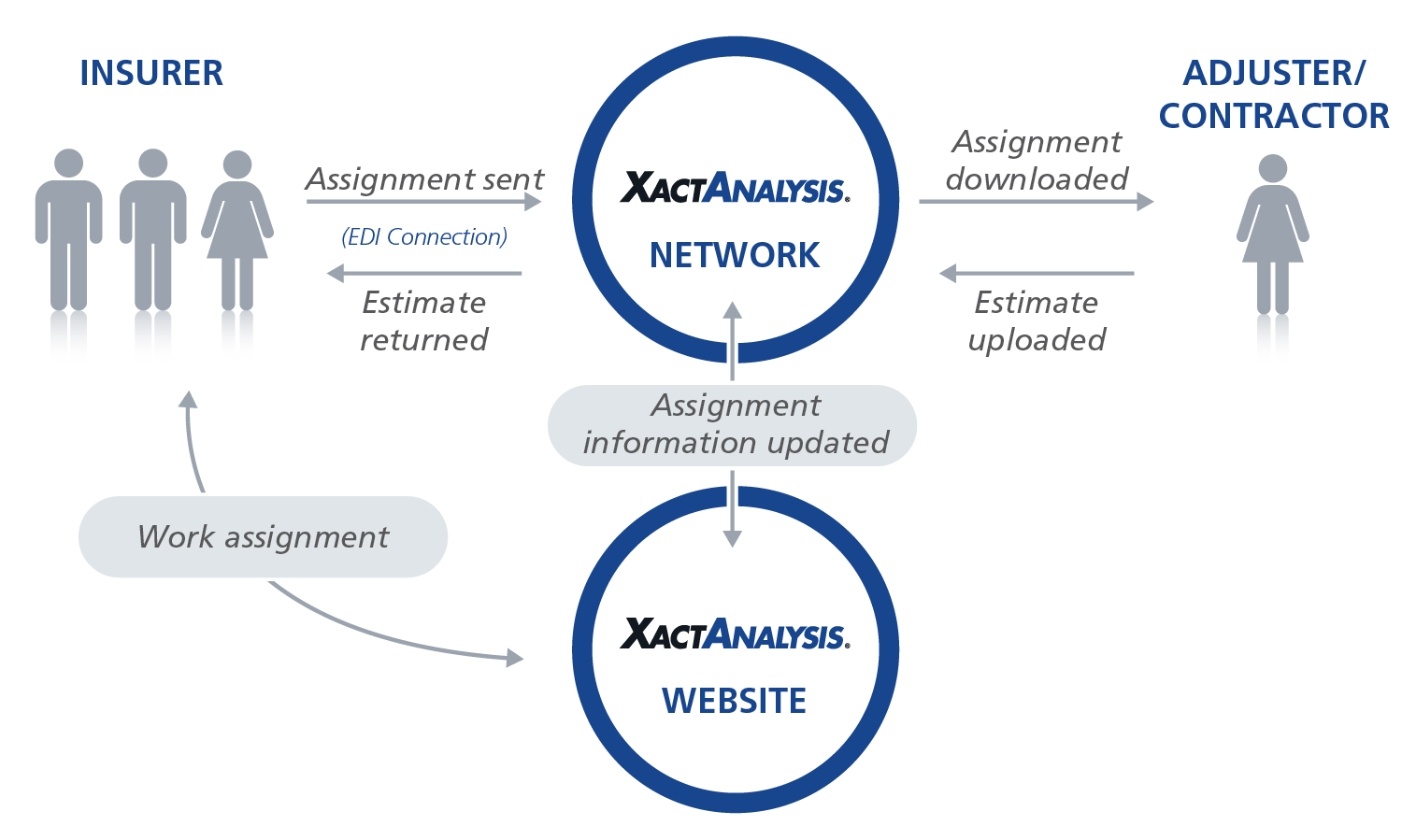
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# Introduction to XactAnalysis

XactAnalysis is the insurance industry’s first real-time assignment processing network. Using XactAnalysis’ powerful and secure extranet site, you can send and track assignments, receive notification of assignment events, view completed estimate information, and create real-time management reports.

# Electronic Data Interchange (EDI) exports

Electronic Data Interchange (EDI) is a connection that can be set up between your company and XactAnalysis through which your assignment information can be imported to XactAnalysis or directly to an adjuster/contractor. Completed estimate information can then be exported back into your system through this connection (see flowchart below).



# File Transfer Options

* **Web Services –** The web service location is hosted by the party receiving the exported file. The URL and credentials must be provided to Xactware to complete the setup configuration. This allows Xactware to pass the XML or ZIP file containing the requested information in real time. Once Xactware has passed the information, the [default response](#_XactAnalysis_Default_Response) is required to close the connection.

\*SOAP with attachments or MTOM will be used when transferring data from Xactware to customers web service.

\*Attachments cannot be sent using REST.

* **SSH File Transfer Protocol (SFTP) –** All SFTP locations are hosted by Xactware. Setup for this option takes 3-5 business days. Xactware will provide the credentials via a secure email. The customer is responsible for removing the exported files from the SFTP directory once they have been collected.

\*The import and export processes are initially set up in the XactAnalysis Test environment. The customer is responsible for testing and must verify through email that the exports are working before Xactware will copy them to the Production environment.

\*XactAnalysis does not export estimates associated with test assignments, although upon request, we can include them.

# Common export types

The following export types can be set up for your company:

* **Assignment export** – Assignment data can be exported when an assignment has entered the assignment queue or when the assignment has been assigned.
* **Estimate export** - All estimate data can be exported when the estimate is marked complete and uploaded to XactAnalysis. See [Estimate export](#_Estimate_export) for detailed information about this export and which files may be included.
* **Status export** - Status data is exported when certain statuses in the estimate are reached or updated. See [Status export](#_Status_export) for detailed information, samples and a list of commonly used statuses regarding this export type.
* **Note export** - Notes are exported when any of the following actions occur: the note is added to the estimate in XactAnalysis, a status is updated in XactAnalysis, or a status is updated in Xactimate. Each note is exported only once. See [Note export](#_Note_export) for detailed information about this export type.
* **Activity Diary export** - Activity diary notes are exported when they are uploaded to XactAnalysis from Xactimate. Activity diary notes are exported only once. After the initial export, XactAnalysis sends only the updated note entries. XactAnalysis can be configured to include the latest activity diary PDF report in the export. See [Activity Diary export](#_Activity_Diary_export) for detailed information about this export type.
* **Custom Document export** - Custom documents may be uploaded in Xactimate or XactAnalysis and can be exported based on individual document approval, or as soon as they are uploaded to the XactAnalysis network. See [Custom Document export](#_Custom_Document_export) for detailed information about this export type.

## Estimate export

XactAnalysis exports all estimate data when the estimate is marked complete and uploaded from Xactimate to XactAnalysis. XactAnalysis can be configured to delay the export until additional statuses have been reached, for example, (Reviewed, Client Approved, or QA Approved). XactAnalysis can also be configured to discard the estimate export if the estimate has been rejected. Additionally, XactAnalysis can be configured to export only files that are marked “Approved” in the Documents tab. When using this option it is recommended that the customer use a delay status. It is also important to note that any corrected or supplemental estimates will be included as they are uploaded.

\*SOAP with attachments or MTOM must be used to receive estimate exports via web services.

\*Attachments cannot be sent using REST.

**Estimate Export Schemas & Data Dictionaries:**

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**Estimate Export Sample:**

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### Exported data

The following files may be included in the Estimate Export:

* XactDoc XML – This file primarily contains assignment or first notice of loss (FNOL) information. It is also referred to as the Standard Carrier XML. Specific information about this XML can be found above in the data dictionary and schema.
* Generic rough draft XML – This file contains mineable data from the estimate. The file name is GENERIC\_ROUGH\_DRAFT.XML. XactAnalysis has the ability to export this file depending on the profile being used by the adjuster/contractor. Information about the Generic Rough Draft can be found in the above data dictionary and schema.
* Photos – An estimate export may contain multiple JPG files that correspond to photos or scanned documents entered in the estimate. The JPG file names are based on Xactimate’s naming convention, which is a 10 based number followed by the .JPG extension, e.g., 1.JPG, 2.JPG, 1615970690.JPG, etc. Original photo names are used as descriptions in XactAnalysis.
* Attached Documents – An estimate export may contain multiple attached document files that correspond to documents entered in the Xactimate attached document form. The document file names are based on Xactimate’s naming convention, which is a ten based number followed by the .ATT extension. XactAnalysis has the option to name these files with their original extensions, e.g., 123456.ATT or MyAttachedDoc.DOC.
* PDF reports – For any given Xactimate profile, Xactimate includes a packaged set of PDF reports in the upload to XactAnalysis. Any of these can be included in the estimate export. Typical files include the following, but can vary by Xactimate Profile:
* Price List Variation Usage Report – report showing the price list used and any deviations
* Report Rough Draft – Carrier copy of the estimate report
* Report Final Draft – Insured copy of the estimate report
* Xactimate Audit Report – report showing Xactimate usage by the adjuster that wrote the estimate
* Underwriting Checklist – report showing responses to underwriting questions as answered by the adjuster
* Photo Summary Sheet – PDF version of the estimate photos with descriptions

The following file name conventions can be used for these files:

* The file name can be based on the report description.
* The file name can be <transaction ID><estimate count><report order number>.PDF. The report order number is formatted in the order in which the estimate report image is generated, e.g., 000015Y1\_1.PDF.
* The file name can be one of the following standard sets of file names: VARIATION\_REPORT.PDF, ROUGH\_DRAFT.PDF, FINAL\_DRAFT.PDF, L\_AND\_M\_REPORT.PDF, and AUDIT.PDF.
* Sketch image files – The sketches from the estimate are included in a single PDF. XactAnalysis uses a naming convention of <transaction Id><estimate count>\_SKT.PDF, e.g., 000015Y1\_SKT.PDF
* Custom Documents – Users can add their own custom documents to the estimate in Xactimate or XactAnalysis. Custom Documents can be included in the export package. These documents are named what the user names them. Supported file types are as follows: Word (.doc, .docx), Excel (.xls, .xlsx), Adobe (.pdf), ZIP (.zip), Text (.txt), Html (.htm, .html), Web Archive (.mht), Message (.msg), sound (.wav, .mp3, .wma), and image (.jpg, .jpeg, .gif, .tif, .tiff, .bmp).

\*Custom documents can be uploaded to XactAnalysis at any time through the estimate process. However, custom documents that are uploaded after the estimate is marked complete and uploaded will not be included until the next supplement/correction is uploaded.

* Other – The following documents from Xactimate can also be included in the export:
* AUDIT.PDF – A PDF that shows Scoping and Overlap information from the estimate
* ACTIVITY\_DIARY.PDF – A PDF that contains all of the Activity Diary Entries from the estimate

## Status export

XactAnalysis exports status data when certain statuses are reached or updated. A list of commonly used statuses are listed below.

\*SOAP with attachments, MTOM, or REST (XML Only) can be used when receiving status exports via web services.

**Status Export Schema & Data Dictionary:**

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**Commonly Used Statuses:**



**Status Export Sample:**

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### XML file attributes

The XML file contains the following attributes:

* Transaction ID
* Claim number
* Status type that triggered the export
* Date stamp of the status in Mountain Time
* Adjuster’s name entered during Xactimate registration (Contact type = “ClaimRep”)
* Adjuster’s telephone number (Phone type = “Office”) using this search sequence:
* First, the adjuster’s notification methods
* Second, phone number entered during Xactimate registration
* Last, blank if no phone number found

\*Note that the Customer Contacted and Site Inspected dates cannot be updated in XactAnalysis once they have already been set.

## Note export

XactAnalysis exports a note when any of the following actions occur:

* A note is added in XactAnalysis
* A status is updated by an XactAnalysis user
* A status (such as Customer Contacted and Site Inspected) is updated from an estimate or an in-progress estimate uploaded from Xactimate

\*SOAP with attachments, MTOM, or REST (XML Only) can be used when receiving Note exports via web services.

### Note Export Schema & Data Dictionary:

**Note Export Sample:**

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### XML file attributes

The XML file contains the following attributes:

* Transaction ID – XactAnalysis unique assignment identifier
* User number – XactAnalysis internal unique user identifier
* User ID – XactAnalysis user ID
* User name – XactAnalysis user name
* Type – “Assignment Note”
* Date stamp – Date and time of the export in Mountain Time

## Activity Diary export

XactAnalysis exports activity diary notes when they are uploaded from Xactimate to XactAnalysis.

\*SOAP with attachments, MTOM, or REST (XML Only) can be used when receiving activity diary exports via web services.

### Activity Diary Note Sample:



### XML file attributes

Activity diary notes are sent as XML with the following attributes:

|  |  |  |
| --- | --- | --- |
| Xactimate field | Description/comments | XML Example |
| Header information for the activity diary. The value field holds the activity number. | | <CLAIM\_INFO>  <ACTIVITY |
| Process | Processes can include several activities. | process="**Repair**" |
| Activity | Activity description. | activity="**Carpet Removal**" |
| Start | The date the activity began. | start="**2006-06-07**" |
| Finish | The date the activity was finished. | finish="**- -**" |
| Description | Short description of the activity | desc="**Remove carpet and haul to dump**" |
| Long description | Long description of the activity | longDesc="**Remove all carpet from living room and dining room**" |
| Expense section | | <EXPENSES>  <EXPENSE |
| Hours | Hours spent | hours="**2**" |
| Expense amount | Expenses incurred | amount="**60**" |
| Expense code | Expense code | code ="**DT**" |
| Code desc | Expense description | codeDesc="**Driving Time Fee**" |
| Miles | Miles driven | miles="**10**" |
| Personal car | Indicates use of a personal car | personalCar="**1**" |
| Mileage – no charge | Indicates if the mileage was for no charge | noCharge="**1**" |
| Mileage – prorated | Indicates if the mileage was prorated | prorated="**1**" |
| Paid by employee | Indicates if the employee paid | paidByEmp="**1**" |
| Closing tags | | />  </EXPENSES>  </ACTIVITY  </CLAIM\_INFO> |

XactAnalysis exports the activity diary notes only once. After the initial upload, XactAnalysis exports only the changes as opposed to exporting all activity diary notes when one or more are modified or added.

### Custom Document export

XactAnalysis exports the following:

* Custom documents uploaded via Xactimate
* Documents or photos uploaded via XactAnalysis

The custom document export can be configured through a file mask so that XactAnalysis exports all custom documents, or only those which meet the file mask requirements.

\*SOAP with attachments or MTOM must be used to receive custom document exports via web services.

\*Attachments cannot be sent using REST.

### Custom Document Schema & Data Dictionary:

**Custom Document Sample:**

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## XactAnalysis Web Service Export (with attachments)

XactAnalysis has the ability to send XML along with binary attachments to a remote web service. This is used with all exports that contain files of various sorts, such as PDF reports and photos.

We currently offer two methods of transporting the export package with attachments:

1. SOAP with Attachments ([W3C documentation](http://www.w3.org/TR/SOAP-attachments))
2. SOAP Message Transmission Optimization Mechanism (MTOM) ([W3C documentation](http://www.w3.org/TR/soap12-mtom/))

The basic idea of these specifications is that each file, or attachment, in the message is preceded by a MIME boundary which contains information regarding the file that follows.

**HTTP Header Requirements**

The content-type HTTP header attribute will be declared as multipart/related when passing a multipart file. The MIME boundary string will also be included as part of the content-type. The boundary identifies the string that separates one file from another.

### MIME Headers

Each file in the web service transaction is preceded by a MIME boundary which contains information about the proceeding file. Below is a summary of each header that will appear in the MIME boundary.

##### Content-Type

This header indicates the Internet media type of the file (e.g., text/xml, image/jpeg, application/pdf)

##### Content-Transfer-Encoding

This header will be set to one of the following based on the file’s content-type:

* **8bit** – for plain text media types (e.g., text/plain, text/html, text/xml)
* **binary** – for all other files

##### Content-Disposition

This will always be set to “attachment.” A file name is also provided in this header.

##### Content-ID

This assigns a unique identifier to the file that is used to reference it within the XML.

### Message XML

The SOAP message begins with an XML that references the attachments that follow. This XML is sent with every web service transaction that contains attachments. This XML file is not customizable. The XML will look like the following:

<?xml version='1.0' encoding='UTF-8'?>

<soap:Envelope xmlns:soap=”http://schemas.xmlsoap.org/soap/envelope/”>

<soap:Body>

<XACTDOC>

<XACTNET\_INFO transactionId=”0000JDL”>

<ATTACHMENTS>

<ATTACHMENT href=”cid:45487@xactware.com”/>

<ATTACHMENT href=”cid:23578@xactware.com”/>

</ATTACHMENTS>

</XACTNET\_INFO>

</XACTDOC>

</soap:Body>

</soap:Envelope>

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### Examples

##### Soap with Attachments

|  |  |
| --- | --- |
| HTTP Header | POST /insuranceClaims HTTP/1.1  Host: example.org  Content-Type: Multipart/Related; type=text/xml; start=”<start.xml>”; boundary=”MIME\_boundary”  Transfer-Encoding: chunked  SOAPAction: “” |
| XML boundary | --MIME\_boundary  Content-Type: text/xml  Content-Transfer-Encoding: 8bit  Content-Id: <start.xml> |
| XML body | <?xml version='1.0' encoding='UTF-8'?>  <soap:Envelope xmlns:soap=”http://schemas.xmlsoap.org/soap/envelope/”>  <soap:Body>  <XACTDOC>  <XACTNET\_INFO transactionId=”0000JDL”>  <ATTACHMENTS>  <ATTACHMENT href=”cid:45487@xactware.com”/>  <ATTACHMENT href=”cid:23578@xactware.com”/>  </ATTACHMENTS>  </XACTNET\_INFO>  </XACTDOC>  </soap:Body>  </soap:Envelope> |
| Attachment 1 boundary | --MIME\_boundary  Content-Type: application/pdf  Content-Transfer-Encoding: binary  Content-Disposition: attachment; filename=”Rough Draft Report.pdf”  Content-Id: <45487@xactware.com> |
| Attachment 1 | *binary data…* |
| Attachment 2 boundary | *--*MIME\_boundary  Content-Type: image/jpeg  Content-Transfer-Encoding: binary  Content-Disposition: attachment; filename=”Front.jpg”  Content-Id: <23578@xactware.com> |
| Attachment 2 | *binary data…* |
| End of transmission | --MIME\_boundary-- |

### MTOM

The structure of an MTOM request is almost identical to that of SOAP with Attachments. The only difference is in the Content-Type headers and the way files are referenced in the XML.

|  |  |
| --- | --- |
| HTTP Header | POST /insuranceClaims HTTP/1.1  Host: example.org  Content-Type: Multipart/Related; type=”application/xop+xml”; start=”<start.xml>”; start-info=”text/xml”; boundary=”MIME\_boundary”  Transfer-Encoding: chunked  SOAPAction: “” |
| XML boundary | --MIME\_boundary  Content-Type: application/xop+xml; type=”text/xml; charset=UTF-8”  Content-Transfer-Encoding: 8bit  Content-Id: <start.xml> |
| XML body | <?xml version='1.0' encoding='UTF-8'?>  <soap:Envelope xmlns:soap=”http://schemas.xmlsoap.org/soap/envelope/” xmlns:xop=”http://www.w3.org/2004/08/xop/include”>  <soap:Body>  <XACTDOC>  <XACTNET\_INFO transactionId=”0000JDL”>  <ATTACHMENTS>  <ATTACHMENT><xop:Include href=”cid:45487@xactware.com”/></ATTACHMENT>  <ATTACHMENT><xop:Include href=”cid:23578@xactware.com”/></ATTACHMENT>  </ATTACHMENTS>  </XACTNET\_INFO>  </XACTDOC>  </soap:Body>  </soap:Envelope> |
| Attachment 1 boundary | --MIME\_boundary  Content-Type: application/pdf  Content-Transfer-Encoding: binary  Content-Disposition: attachment; filename=”Rough Draft Report.pdf”  Content-Id: <45487@xactware.com> |
| Attachment 1 | *binary data…* |
| Attachment 2 boundary | *--*MIME\_boundary  Content-Type: image/jpeg  Content-Transfer-Encoding: binary  Content-Disposition: attachment; filename=”Front.jpg”  Content-Id: <23578@xactware.com> |
| Attachment 2 | *binary data…* |
| End of transmission | --MIME\_boundary-- |

XactAnalysis Default Response XML – Schema



**XactAnalysis Default Response XML - Sample**

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# Data Security

Data security is of the utmost importance to Xactware. General setup for Xactware’s data center is below:

* Topflight security and built-in redundancies in an earthquake resistant facility
* Substantial excess capacity for rapid expansion and unexpected loads
* 3 Tier application development with redundant servers at all tiers
* Real time systems monitoring and notification
* Daily back-ups
* Real-time offsite data replication
* Redundant, secure and fault tolerant network
* Scalable and adaptable data center architecture
* Power, cooling, racks, security and management components were designed and tested as part of an integrated system.
* Disaster recovery site in New Jersey in a hardened, secure facility that is monitored 24x7x365.
  + Infrastructure and security is equivalent to Xactware’s primary data center

Xactware maintains two data centers with diverse physical and geographical carrier service routes in Lehi, UT and Jersey City, NJ. Additionally, each location maintains a 24x7x365 Network Operations Center (NOC) with around the clock network monitoring, incident tracking and logging.



Backup generators synchronize with redundant UPS systems so that there is no interruption of service when moving to generator power. The high capacity output of these generators supports all operations and these systems are tested regularly under real world emergency conditions.

With relation to data center security, Xactware’s multi-tier physical security guarantees access by authorized personnel only. Xactware also maintains automated alarm and video surveillance systems with both internal and external security cameras. These systems are monitored 24x7x365. All movement through the facility is tracked and restricted by usage of electronic key cards.

Xactware’s Lehi data center is approximately 11000 sq. ft. housing 750+ servers with 75+ routers, switches, and load balancers. There are multiple clustered pairs of firewalls comprising a 2-tier system for both employee and production traffic. Our network is fully redundant and extremely scalable.