

5x Decryption Instructions

To facilitate customers who may wish to explore other insurance platform options, HawkSoft provides a self-service process to enable your agency to decrypt and export your client and policy data. This process enables your agency to remain in control of your data, and to receive the decrypted files as quickly as possible.

This article explains how to decrypt and export your data from HawkSoft, and the steps needed to prepare for that process.

Before you begin


- To decrypt and export your data, your HawkSoft program must be on **version 5.08**.



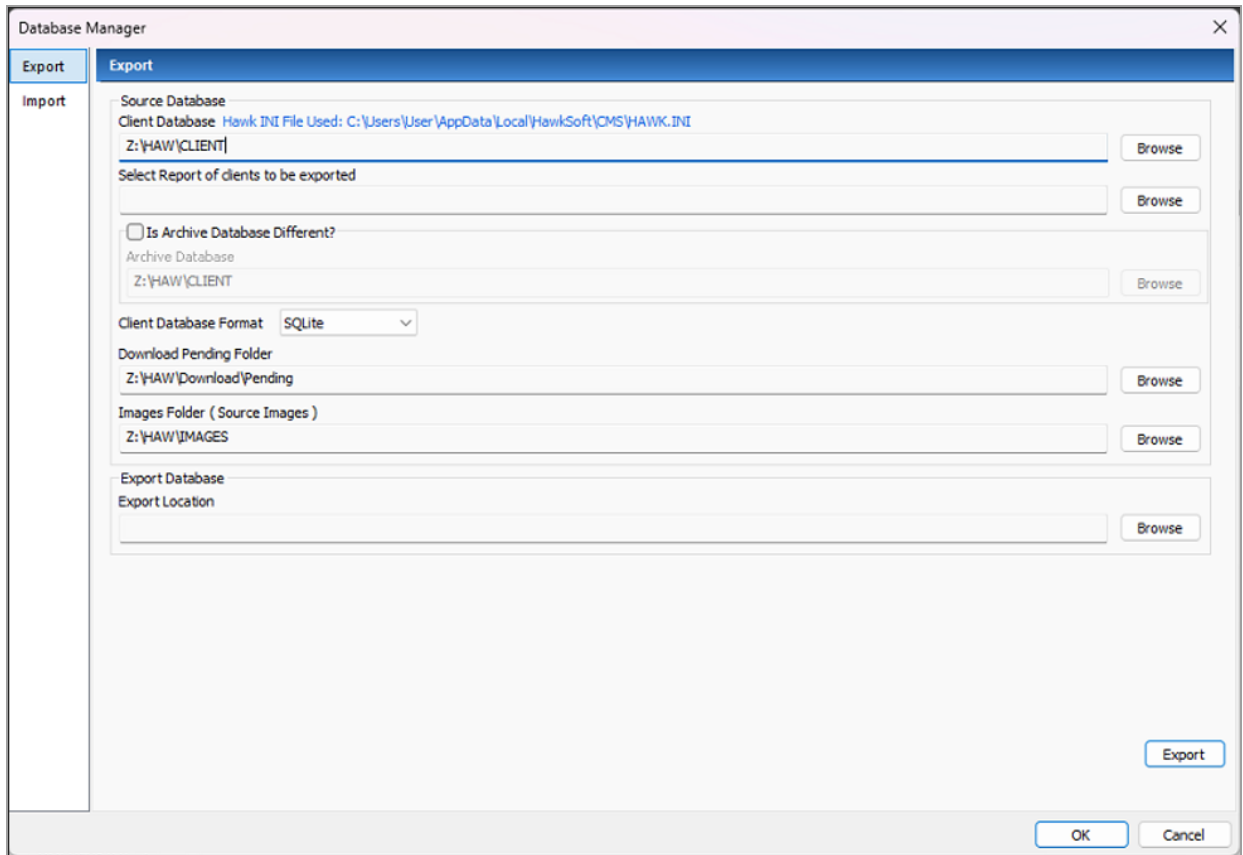
Caution! When decrypting your data, a full copy of your \haw\Images and \haw\Client folders will be made. These can be large folders, and as a result this could require more space than you have available on your hard drive.

Please consult with your IT technician to confirm you have sufficient drive space available, or to clear or expand storage as needed.

To decrypt and export your data

1. Launch HawkSoft and log in with your user initials and password.
2. Click **Utilities**  in the upper right, then select **Data Export** from the drop-down menu.

The Database Manager window launches.



3. Review the file paths listed in these fields to confirm they match the locations where your HawkSoft data is stored.

- **Client Database** - This should match the location of your Haw\Client folder.
- **Download Pending Folder**- This should match the location of your Haw\Download\Pending folder.
- **Images Folder (Source Images)** - This should match the location of your Haw\Images folder.


If any of these paths are incorrect, click the **Browse** button to the right of the field and select the correct folder location using the file browser.


4. Select the **Client Database Format** from the drop-down menu. This determines the file type your data will be exported as. Available options are **Client File Format**, **CSV**, and **SQLite**.



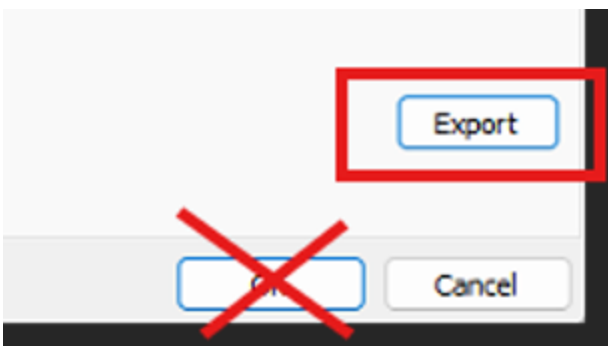
Consult with your new insurance platform vendor to determine which file type they prefer for import.


5. Select the **Export Location** by clicking the **Browse** button to the right of the field and selecting a folder with the file browser.

 The Export Location is the folder where the decrypted files will be placed at the end of the process, and should be a location you can easily find. HawkSoft recommends creating a new folder labeled HawkSoftDecryption and using this as the Export Location. An example path from the screenshot at the top of this section might be "Z:\HawkSoftDecryption".

 Check with your IT to make sure the Export Location you select has sufficient drive space. If insufficient space is available, the decryption process will return an error, and will have to be started again from the beginning once sufficient drive space is made available.

6. Confirm that all fields are filled out correctly, then click **Export** to begin the decryption process. Do not click OK or Cancel, as these will close the window without starting the decryption.



 The fields needed to begin the decryption are, as described above: Client Database, Client Database Format, Download Pending Folder, Images Folder, and Export Location.

The “Select Report of Clients to be Exported” field is only used for a partial extraction of data, and the “Archive Database” section should only ever be changed in very rare technical circumstances. Please consult with your Customer Success Manager if you believe your decryption circumstances require either of these uncommon fields.

A progress bar is displayed. When the progress bar completes, a log window launches that confirms the process is complete and shows any errors (most commonly, missing attachment files).

7. Confirm the export was successful.

Browse to the Export Location you previously selected and confirm the exported files are present and in the desired export format.

Once you have the exported files, you can deliver them to your new insurance platform vendor by their preferred method. HawkSoft recommends backing up the exported files for safekeeping on another device and/or removable storage such as a DVD or external hard drive.
