

# Scheduled Exports

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| <b>Purpose</b>                         | Create and maintain automatic Provider Data Exports for reporting, synchronization, or recurring review.                                  |
| <b>Who should do this</b>              | Central Administration users, CAREWare administrators, and data managers who manage scheduled exports.                                    |
| <b>Use this guide when you need to</b> | Schedule CSV or SQL exports, select providers and filters, and set the export frequency.  |
| <b>Main warning</b>                    | Scheduled export files are saved on the CAREWare Business Tier server in the location configured by <a href="#">PDI_ExportDirectory</a> . |

## Quick path

**Path:** Central Administration > Administrative Options > Provider Data Import and Export Features > Provider Data Export > Scheduled Exports

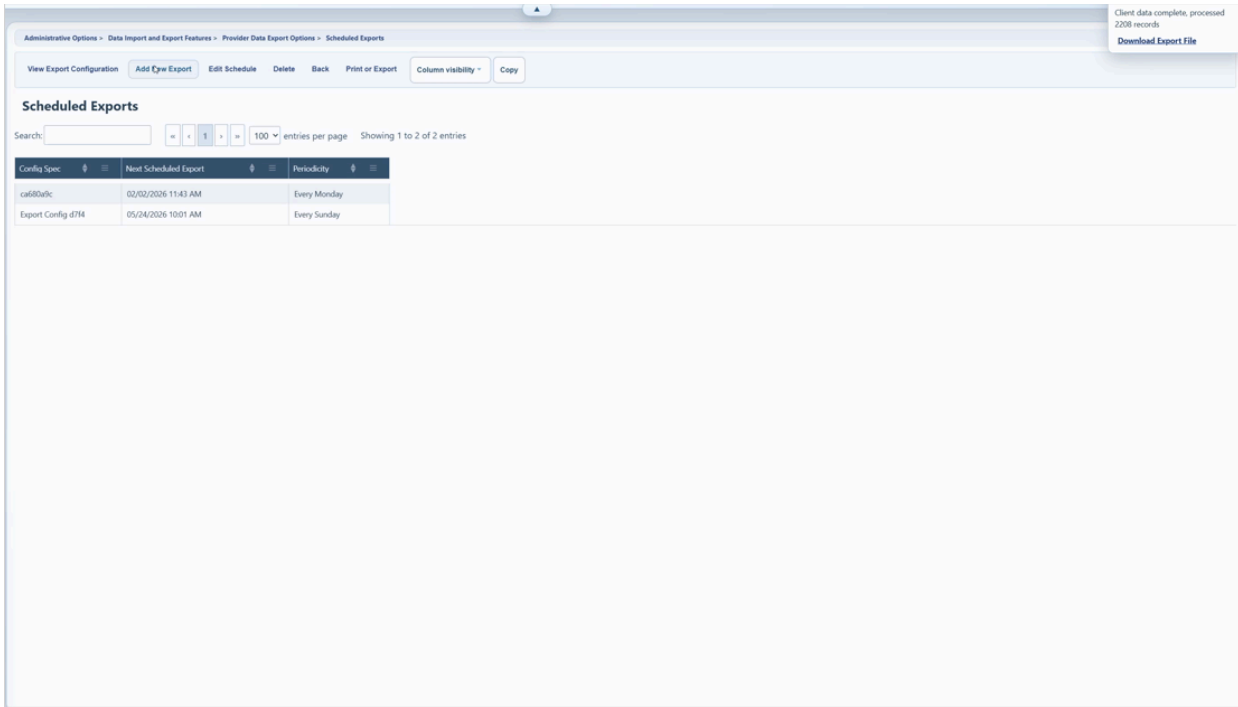
## Before you begin

Decide the export format, providers, date logic, filters, custom fields, and repeat schedule. Confirm that the server export folder is available and backed up according to your organization's policy.

**Important:** Scheduled exports use the same filtering and table selection logic as a manual Provider Data Export. Test a manual export first when setting up a new recurring workflow.

## Create an export schedule

1. Log into Central Administration.
2. Click Administrative Options.
3. Click Provider Data Import and Export Features.
4. Click Provider Data Export.
5. Click Scheduled Exports.
6. Click Add New Export or Schedule New Exports.
7. Complete the schedule form with the export name, format, date logic, and other basic settings.
8. Click Save.



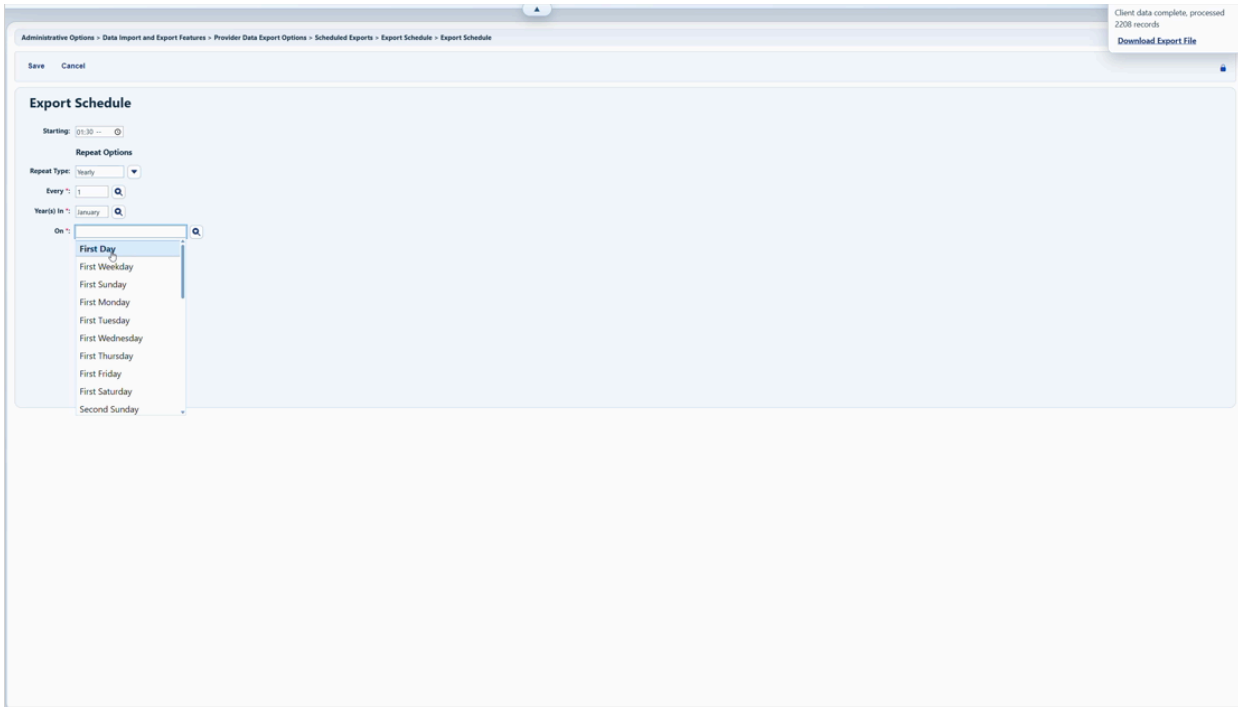
## Complete the export configuration

1. Select the scheduled export in the list.
2. Click View Export Configuration.
3. Use Edit Configuration to change export settings.
4. Use Edit Providers to choose which providers are included.
5. Use Edit Funding Filter, Edit Client Filter, and Edit Custom Fields as needed.
6. Save each edit before returning to the configuration page.

**Tip:** Client filters limit the clients included in the export. Funding filters limit exported services based on the funding sources for service contracts.

## Set the repeat schedule

1. Click Edit Schedule.
2. Click Edit.
3. Select a Starting time or date.
4. Select a Repeat Type.
5. Complete the repeat options. Daily uses days of week; weekly and monthly schedules include additional frequency options.
6. Click Save.



## How to confirm it worked

1. Return to the Scheduled Exports list.
2. Confirm that Next Scheduled Export and Periodicity show the expected schedule.
3. After the next run, check Export History for the scheduled export.
4. Confirm the exported file appears in the PDI\_ExportDirectory folder on the CAREWare Business Tier server.

## Troubleshooting and common questions

- **Why did the export not appear in my downloads?** Scheduled exports are saved to the server folder, not the browser downloads folder.
- **Why are counts unexpected?** Review the export configuration, date logic, provider selection, filters, and table selections.
- **Why does Export History show System as the user?** Scheduled exports are run by the CAREWare Business Tier and are logged as System.

## Related guides

[New Export](#) | [Export History](#) | [Scheduled CSV Report Data Export](#) | [Exporting Data Out of CAREWare](#) | [Common Storage Values](#)