

SQL Server Import

Purpose	Configure CAREWare to create and use the cw_pdi database for SQL-based import/export workflows.
Who should do this	CAREWare administrators, database administrators, and data managers who manage SQL PDI.
Use SQL Server Import when you need to	Import or export PDI data using SQL Server instead of a manual file upload.
Main warning	The SQL Server connection string to the cw_pdi database must work before SQL imports can run.

Quick path

Administrative Options > Data Import and Export Features > Provider Data Import > SQL Server Import.

Before you begin

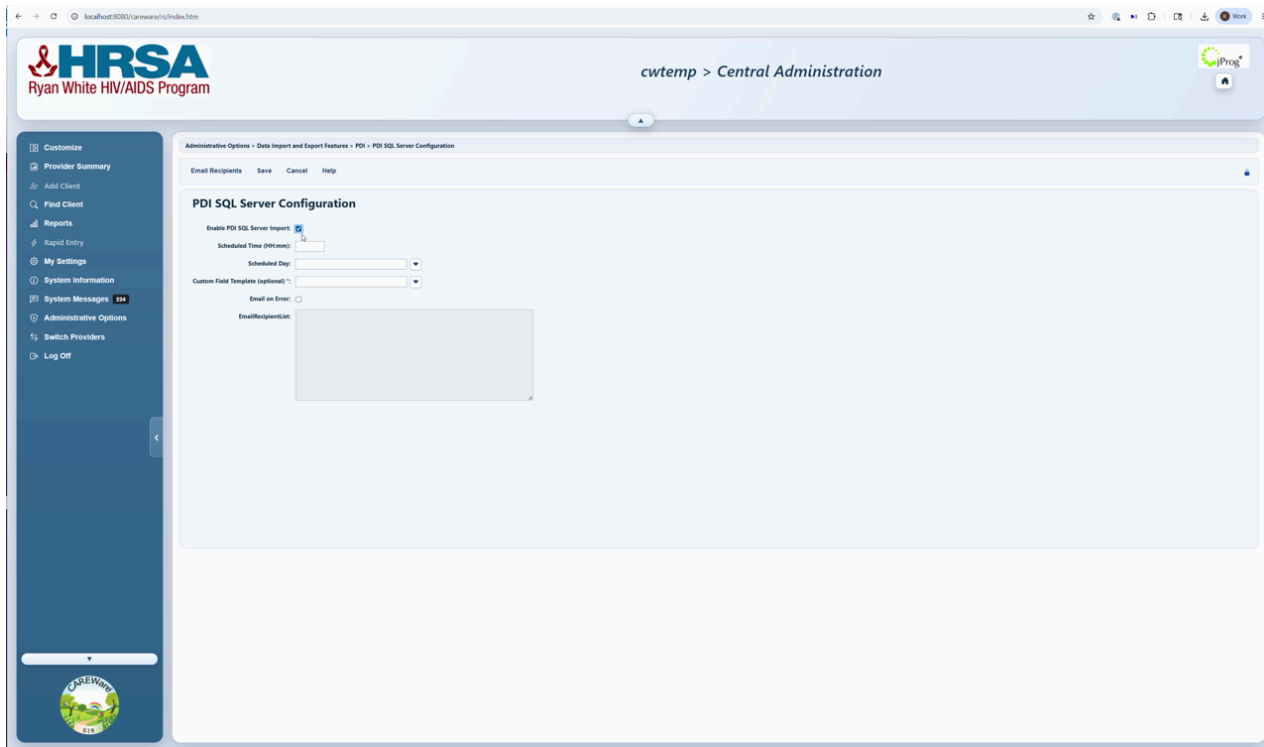
- Confirm you are in Central Administration.
- Coordinate with the CAREWare server administrator before changing SQL connection settings.
- If custom fields are needed, create or select the appropriate [Custom Field Template](#).

Important

When SQL Server Import is enabled, CAREWare creates the cw_pdi database and connection information. The cw_pdi database must be moved with cw_data during server migrations.

Enable SQL Server Imports

1. Log into Central Administration.
2. Click Administrative Options.
3. Click Data Import and Export Features.
4. Click Provider Data Import.
5. Click SQL Server Import.
6. Check Enable PDI SQL Server Import.
7. Enter the Scheduled Time.
8. Select the Scheduled Day.
9. Optional: select a Custom Field Template.
10. Click Save.



Add error email recipients

1. On the PDI SQL Server Configuration page, check Email on Error.
2. Click Email Recipients.
3. Click Add.
4. Enter the recipient email address.
5. Click Save.

Configuration requirements

Setting	What it means	Check
Server Address	The CAREWare SQL Server database instance.	Must point to the correct SQL Server instance.
Database Name	Default is cw_pdi.	Must match the SQL database name.
SQL Login ID	Usually the same login is used as the one for cw_data. The default is cwbt.	Login must exist in SQL and have required permissions.
Password	Password for the SQL login.	Must match the SQL Server login password.
Database owner	The login must be set as the DBO for cw_pdi.	Confirm after restore or migration.

How to confirm it worked

1. Open the PDI SQL Server Configuration page and confirm Enable PDI SQL Server Import is checked.
2. Confirm the cw_pdi database exists in SQL Server.
3. Run or wait for the scheduled import and verify results in [Import History](#).

Troubleshooting and common questions

SQL importing stopped after migration. What is likely wrong?

The cw_pdi database may not have moved with cw_data, the login may not be set as the DBO for cw_pdi, or the connection string may need to be updated.

Where do SQL import errors appear?

Review email notifications if enabled, [Import History](#), [Administrative Alarms](#), and [System Logs](#).

We enabled SQL PDI and now we cannot open the Provider Data Import section.

There may be an issue with the database connection string or the creation of the cw_pdi database. Follow the instructions [here](#) to verify the issue and fix it.

Related guides

[Restoring SQL PDI Functionality After Migrating CAREWare](#) | [Import Settings](#) | [Import History](#) | [Provider Data Import](#) | [Custom Field Templates](#)