

CAREWare includes options to import data in several formats including importing from a SQL Server Database. When using the SQL Server Import option, CAREWare creates a database called cw_pdi in the CAREWare database instance. The cw_pdi database uses the same [pdi specifications](#) as the [PDI Template.mdb](#) file located in the RW CAREWare Business Tier folder. Once the SQL Server Import is enabled, the cw_pdi database is created and ready for importing or exporting data using SQL.

Follow these steps to 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. Click *Save*.

Note:SQL Server Imports are scheduled tasks. To begin importing data from the cw_pdi database, the import process needs to be scheduled.

8. Enter the *Scheduled Time (HH:mm)*.
9. Set the frequency by selecting the Scheduled Day.

Administrative Options > Data Import and Export Features > PDI > PDI SQL Server Configuration

Save Cancel

PDI SQL Server Configuration

Enable PDI SQL Server Import:

Scheduled Time (HH:mm): 03:26

Scheduled Day: Daily Click here to select from 8 choices.

Custom Field Template (optional): Daily

Email on Error: Weekly, Sunday

EmailRecipientList: Weekly, Monday

Weekly, Tuesday

Weekly, Wednesday

Weekly, Thursday

Weekly, Friday

Weekly, Saturday

Additional options include using custom field templates. To import custom field records, those custom fields need to be saved as a template in CAREWare and those custom field columns need to be added to the cw_pdi database to match the template.

Administrative Options > Data Import and Export Features > PDI > PDI SQL Server Configuration

Save Cancel

PDI SQL Server Configuration

Enable PDI SQL Server Import:

Scheduled Time (HH:mm):

Scheduled Day:

Custom Field Template (optional): Click here to select from 10 choices.

Email on Error:

EmailRecipientList:

- adap_SystemTemplate
- Annual Review
- Attachments
- Case Manager
- Custom Service Fields
- Default_SystemTemplate
- Default2_SystemTemplate

Each of these templates listed under *Custom Field Template (optional)* are saved under Custom Field Templates.

To add a Custom Field Template to the list, follow the steps [here](#).

The SQL Server Imports feature includes an option to email users error messages that occur during the import.

To prompt users for import errors check *Email on Error*.

Administrative Options > Data Import and Export Features > PDI > PDI SQL Server Configuration

Save Cancel

PDI SQL Server Configuration

Enable PDI SQL Server Import:

Scheduled Time (HH:mm):

Scheduled Day:

Custom Field Template (optional):

Email on Error:

EmailRecipientList: