Custom reports can be scheduled to export to a folder in CSV format using Report to CSV in the Export Menu.

- 1. Click Administrative Options.
- Click *Export Menu.* Click Report *to CSV.*

Export Menu	
RSR Export	
Provider Data Export	
Report to <u>C</u> SV	
Back to Administrative Options	

4. Click Schedule New Export.

CSV Report Data Export					
Automation Setup	Search Search All Columns				
	↑ Export Configuration	Next Scheduled Export	Periodicity		
F1: Schedule New Export	Service Report	07/05/2017	Every 1 Week(s) on Wednesday		
F2: Edit Schedule					
Del: Delete Schedule					
Esc: Close					

PDE - Export Schedule Setup	
-View/Edit	Select the custom report
Data Scope	Report:
Provider:	Service
ADAP Default Tester	File Name Prefix: Enter the file name.
	Output Path:
Enter a location to save the file.	Show New Clients Only Show Clients With Service Only Include 365 days worth of data in the export.
Export Schedule: edit Every 1 Week(s) on Wednesday the	hecked, only client's with enrollment date during date span are included.
Export frequency and next date to export	Ave Cancel Number of days back from the Next Export date. This report would run from 07/05/2016 to 07/05/2017.

5. Click *Edit* to adjust the frequency of the report's *Export Schedule*.

		-		×
Save Click Sav	/e when selections are complete.			
Cancel/Close	Next Scheduled Event:			
s F	tarting: 6/28/2017 10:25:00 AM Repeat: Set the date and time for export schedule.	the re	eport	
, c	Daily Every SIM TIN TIN TIN S			
Options for	veekly Every 1 ▼ Week(s) On: Wednesday ▼			
exports	Monthly Every Month(s) On:			
c	Yearly Every Year(s) In: On:		,	-
	Every 1 Week(s) on Wednesday			//

6. Once all selections are made, click *Save*.

At the scheduled time, the results of that custom report will be exported to the *Output Path* generating a CSV file named using the the prefix set in the *Export Schedule Setup* window.

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