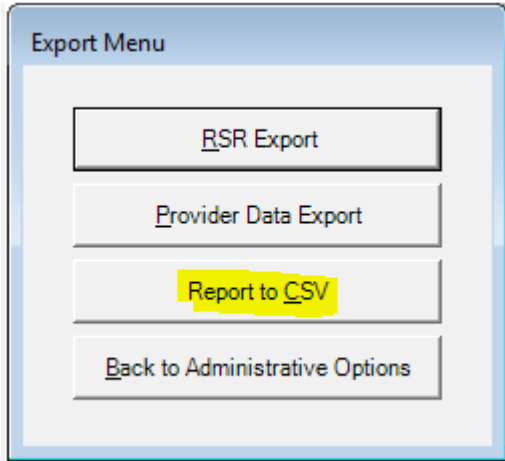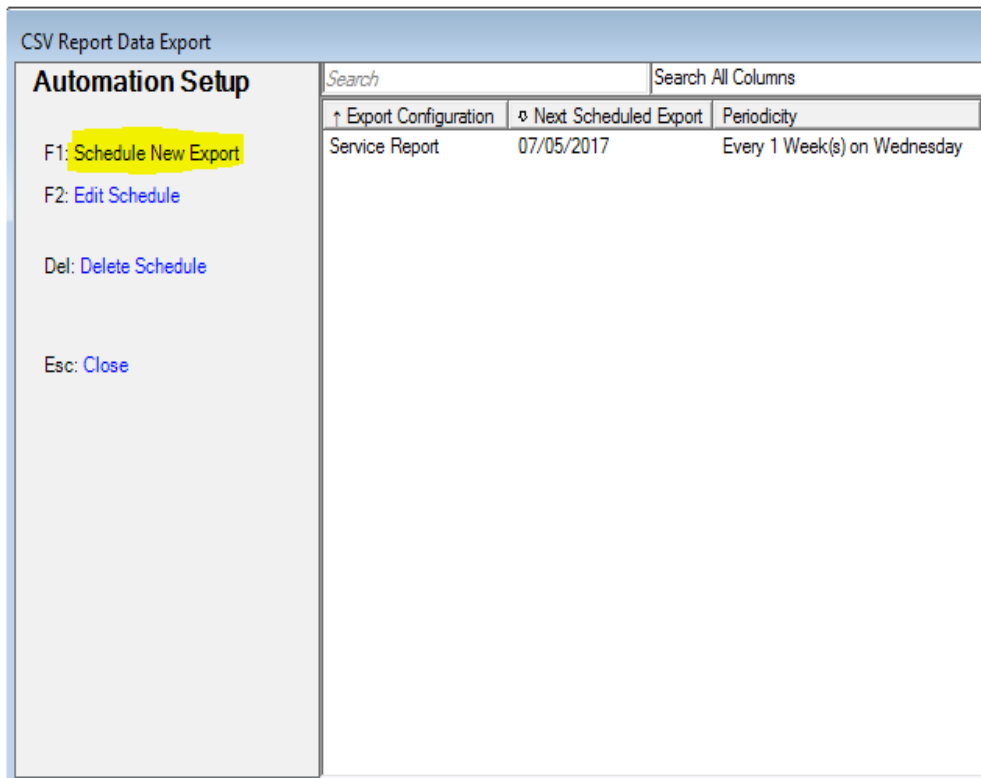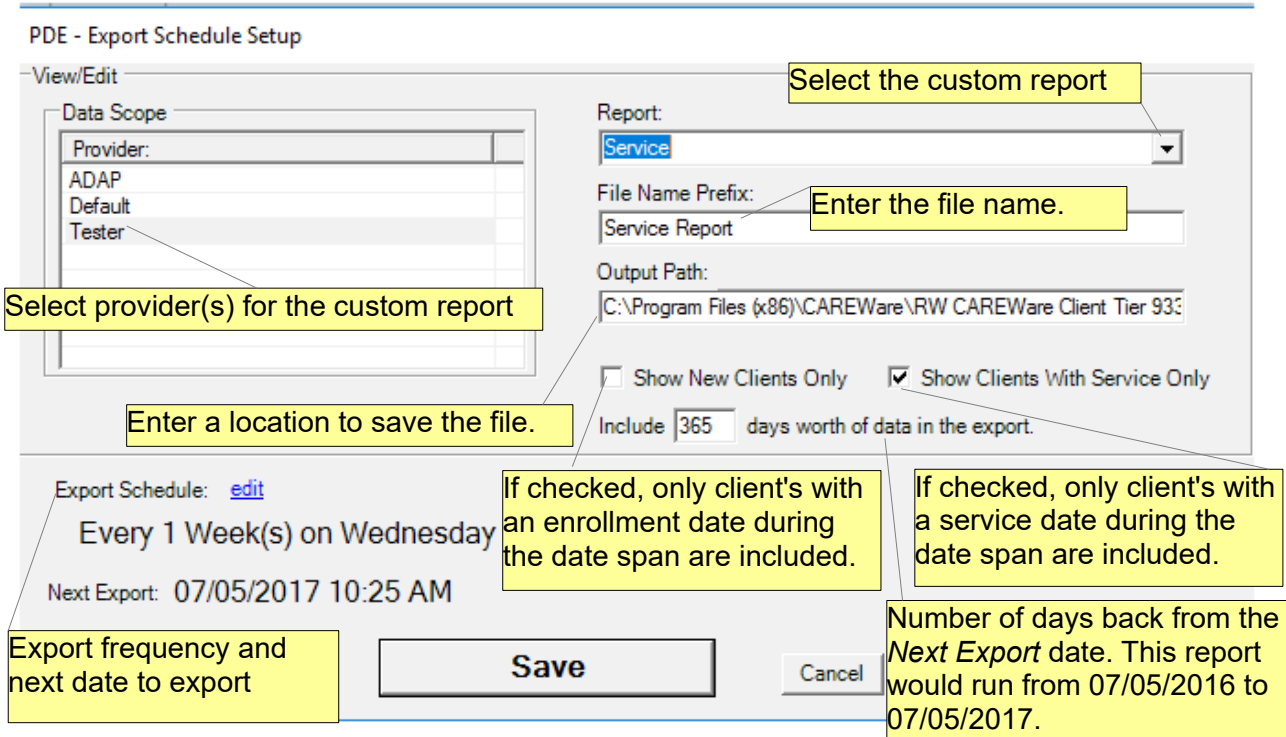Custom reports can be scheduled to export to a folder in CSV format using Report to CSV in the Export Menu.

1. Click *Administrative Options.*
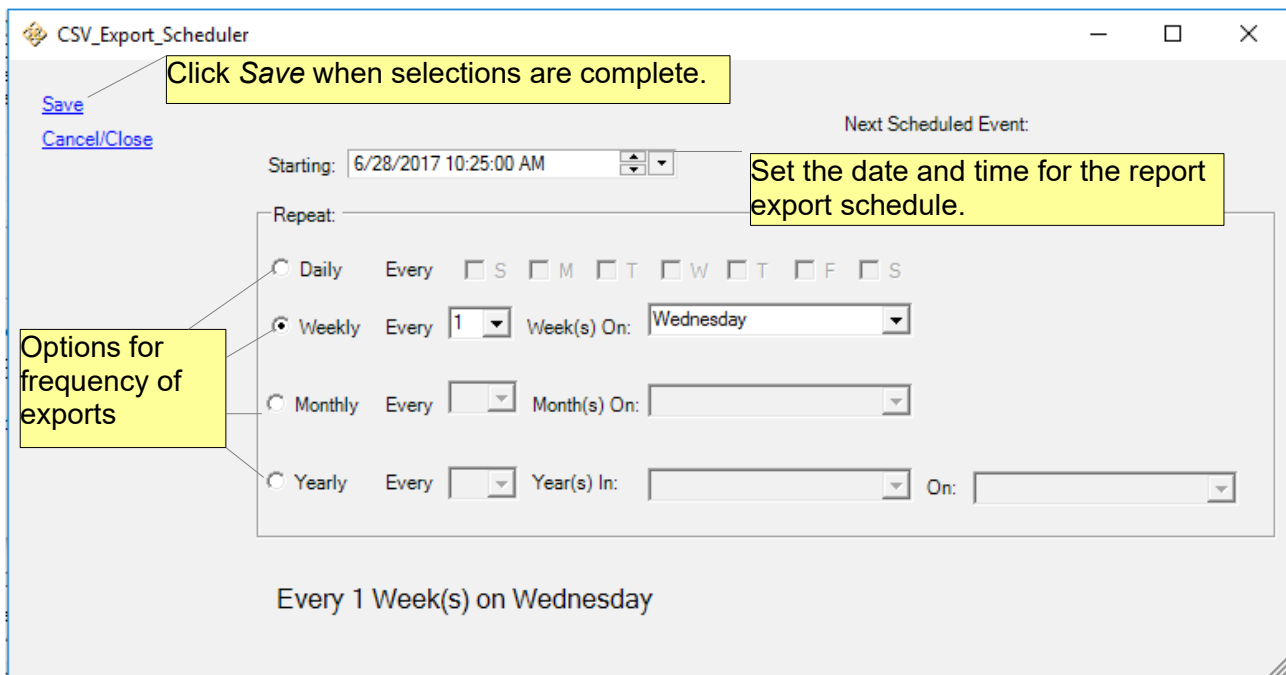2. Click *Export Menu.*
3. Click Report *to CSV.*

4. *Click Schedule New Export.*

PDE - Export Schedule Setup

View/Edit

Data Scope

Provider:
- ADAP
- Default
- Tester

Select the custom report

Report:

Service ▾

File Name Prefix: Enter the file name.

Service Report

Output Path:

C:\Program Files (x86)\CAREWare\RW CAREWare Client Tier 933

Select provider(s) for the custom report

☐ Show New Clients Only   ☑ Show Clients With Service Only

Enter a location to save the file.

Include 365 days worth of data in the export.

Export Schedule: edit

Every 1 Week(s) on Wednesday

If checked, only client's with an enrollment date during the date span are included.

If checked, only client's with a service date during the date span are included.

Next Export: 07/05/2017 10:25 AM

Export frequency and next date to export

Save   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*.

CSV_Export_Scheduler

— ▢ ✕

Click *Save* when selections are complete.

Save

Cancel/Close

Next Scheduled Event:

Starting: 6/28/2017 10:25:00 AM ▴▾ ▾

Set the date and time for the report export schedule.

Repeat:

○ Daily   Every ☐ S ☐ M ☐ T ☐ W ☐ T ☐ F ☐ S

◉ Weekly   Every 1 ▾ Week(s) On: Wednesday ▾

Options for frequency of exports

○ Monthly Every ▾ Month(s) On: ▾

○ 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.