

Bulk Export

Follow the steps below to export all your patient files and attachments:



Written by eNoteFile Team

Updated over a week ago

Summary:

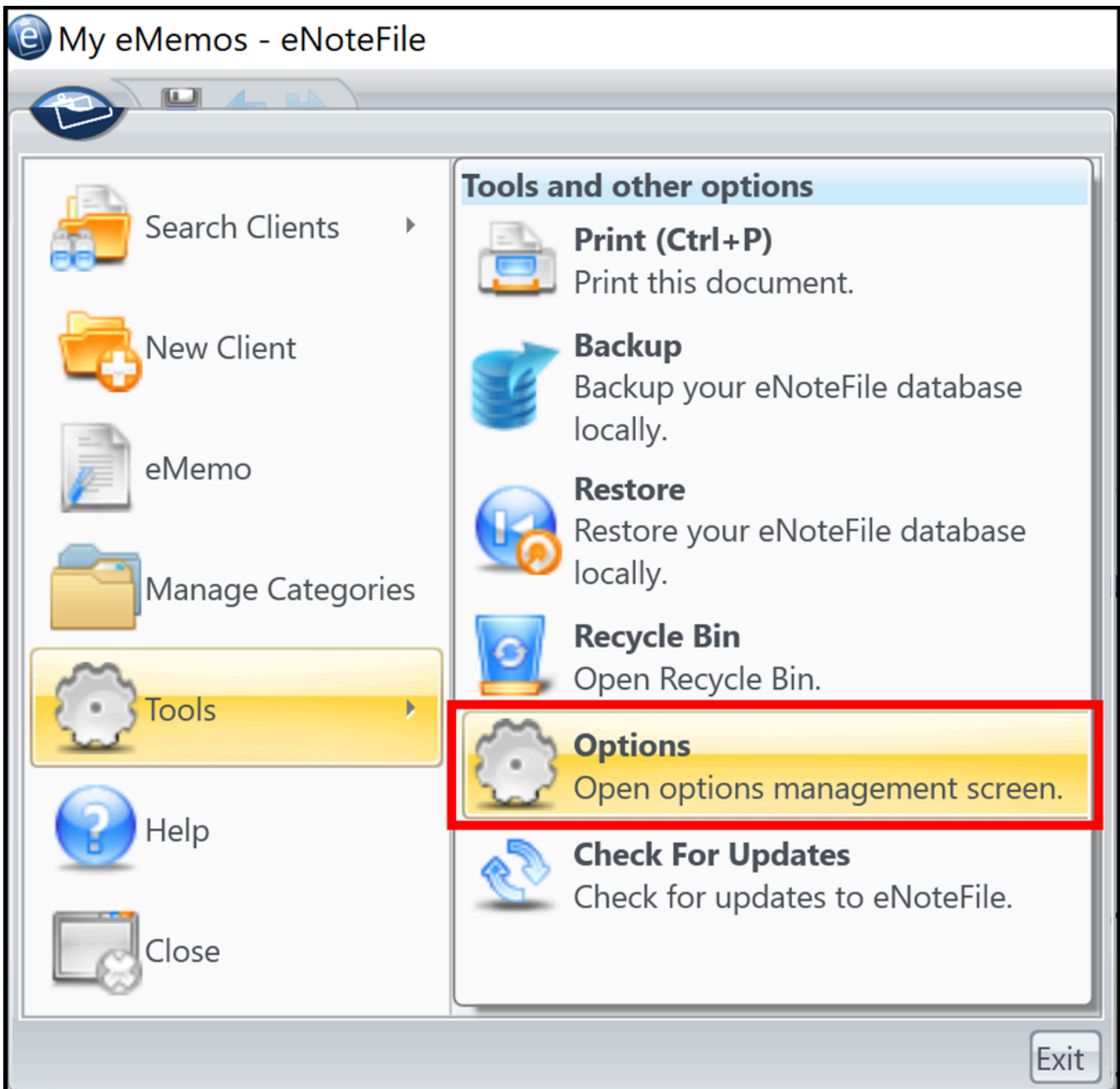
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Checklist before you begin:

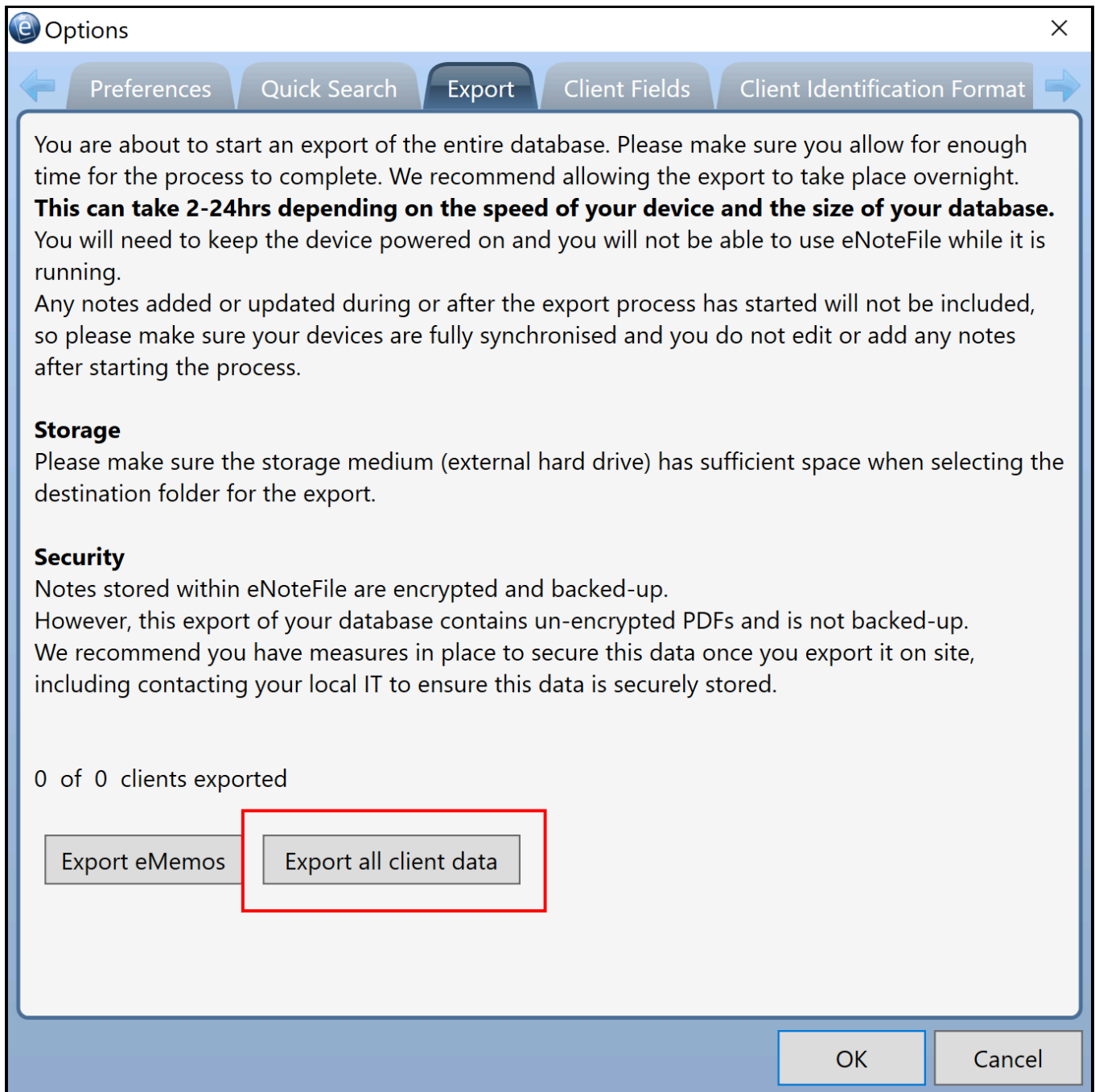
- Make sure you are on the **latest version**: [Update eNoteFile here](#)
- Make sure you are logged in as an eNoteFile **Administrator** (you can't access the bulk export feature if you are a standard user)
- Make sure you have **enough storage** to export your database (*large hard disk drive like 200GB+*)
- If needed, **restore any deleted patient files** from recycle bin as deleted clients will be skipped in the export (Click on the **E button** → **Tools** → **Recycle bin**)
- Make sure you **don't need access to eNoteFile on the export computer** as the computer will have to remain on when the export is running and will lock eNoteFile
- Make sure that all your devices have **synchronised the latest notes** (connected to the internet)
- Make sure you have either updated or removed any Clients that have special characters like this \ / : * ? " < > | in their name: [More info below](#).

Begin Bulk Export

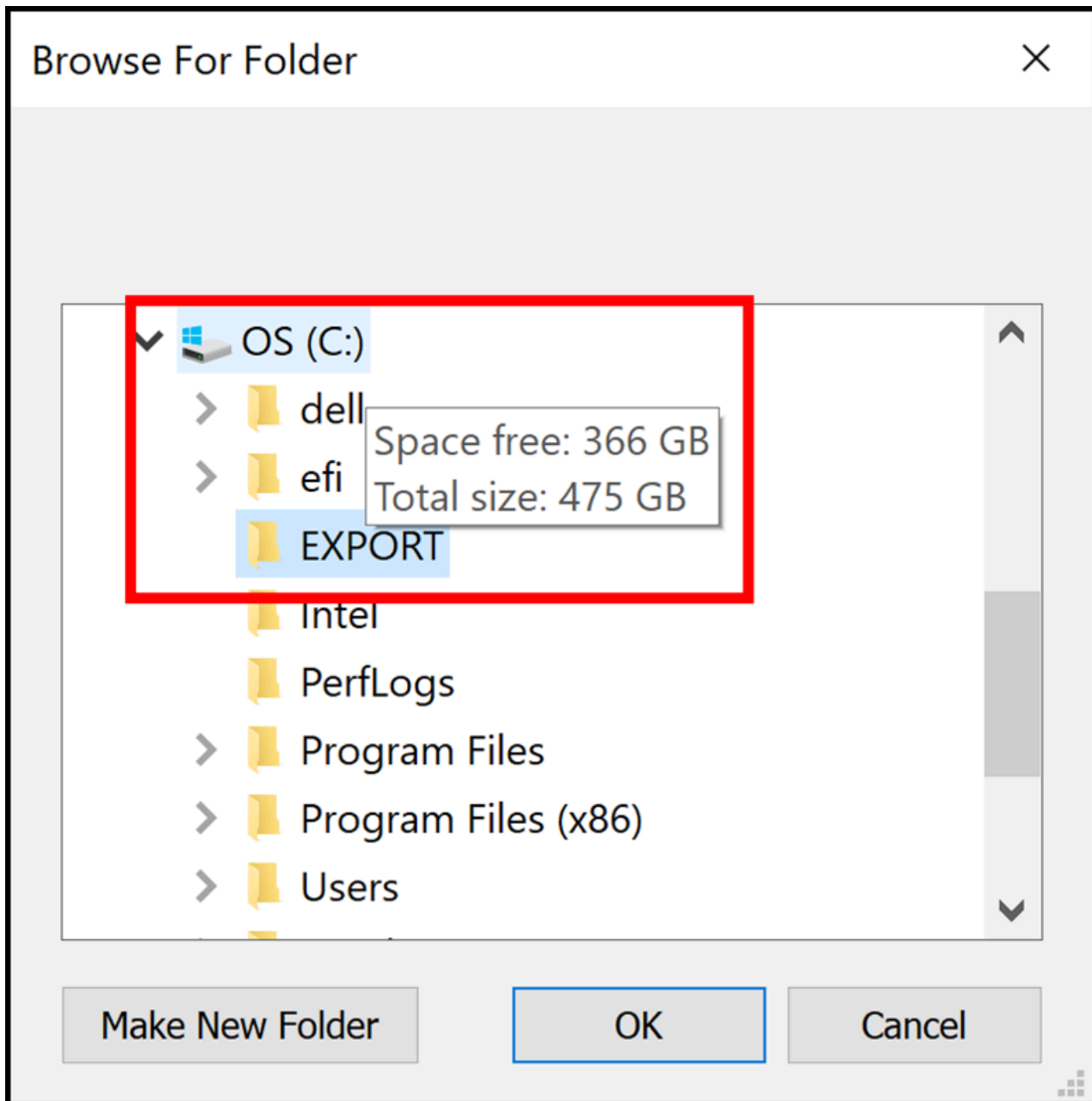
Click on the **E button** → **Tools** → **Options**



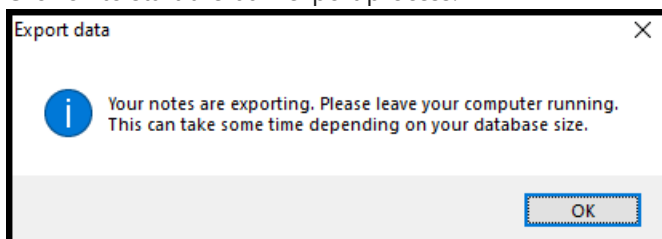
Click **Export Clients**  **Export all clients**



Create and name a folder like **EXPORT** with enough space on the disk (this example has 300GB+).

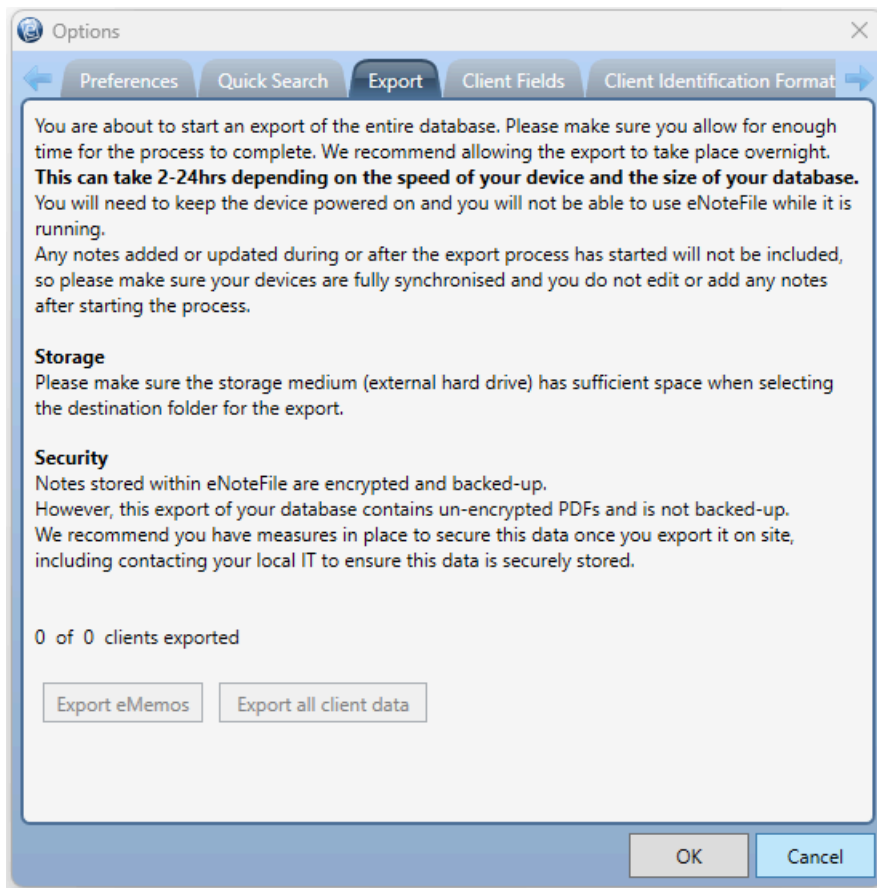


Click ok to start the bulk export process.

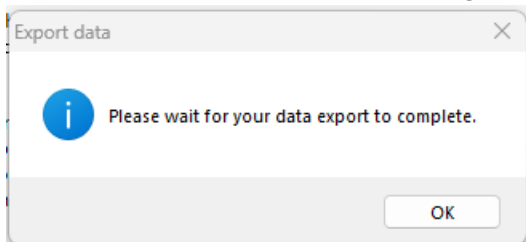


Once you have clicked the OK button (above) you will be returned to the main export screen.

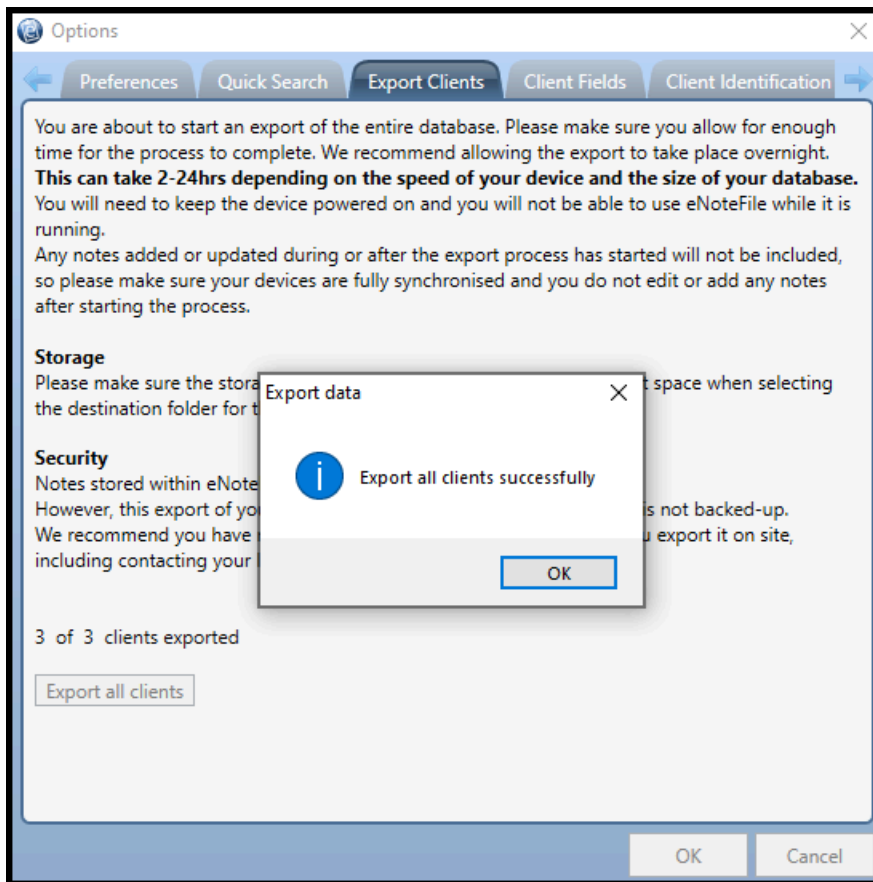
DO NOT USE ENOTEFIELD WHILE THE EXPORT IS RUNNING. Please do not click anything on this screen including the OK or Cancel buttons or try to close this window.



Please do not click anything on this screen including the OK or Cancel buttons or try to close this window. If you do click on the window and see the following alert (below), click the OK button to dismiss the panel so that it goes away.



The export process will lock eNoteFile and can take several hours to complete depending on the size of your database (DO NOT USE ENOTEFILE WHILE THE EXPORT IS RUNNING).

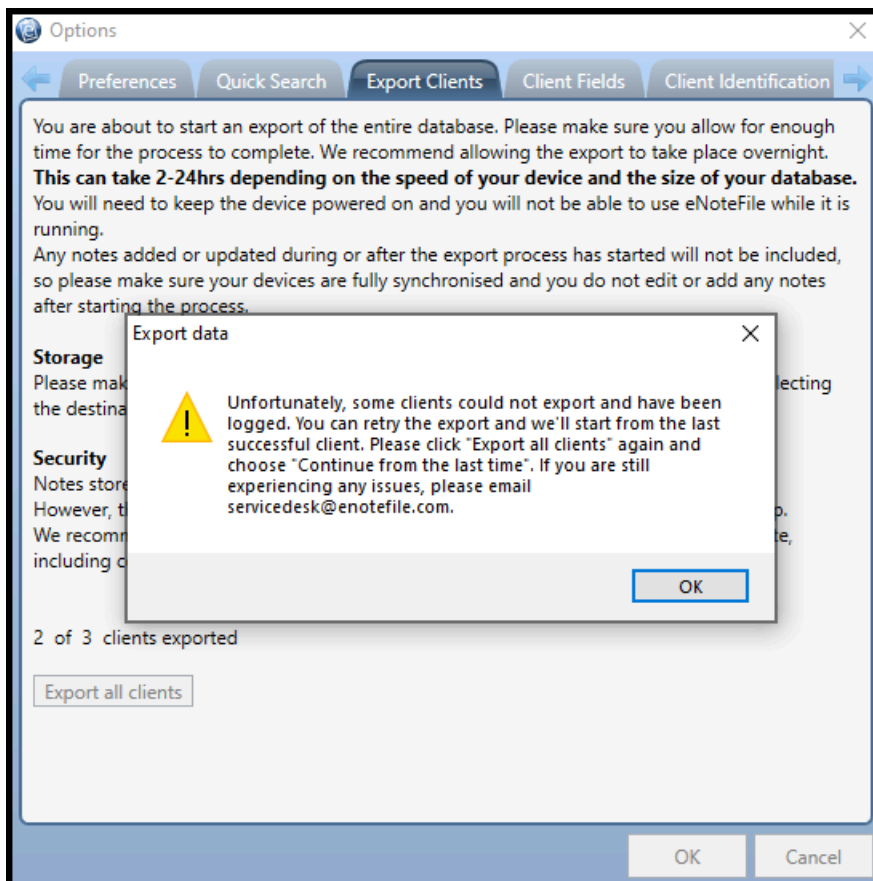


When the process is complete you have exported a structured patient folder with **all your Active Patient notes as PDF's, Patient Attachments** and a **CSV list of all your client data**. Here is a [sample export](#) to illustrate the folder structure of the export folder.

Troubleshooting

Some clients did not export

If you have any issues, please email the "**FailedExportProjects.txt**", that is located in the export folder you created, to servicedesk@enotefile.com and we can help rectify any issues.



<input type="checkbox"/>	Name	Date modified	Type	Size
<input type="checkbox"/>	FailedExportProjects.txt	23/11/2022 10:45 AM	Text Document	4 KB
<input type="checkbox"/>	SuccessExportProjects.csv	23/11/2022 10:45 AM	Microsoft Excel C...	2 KB
<input type="checkbox"/>	SuccessPreviousExportProjectIds.txt	23/11/2022 10:45 AM	Text Document	1 KB

Remove Special Characters in your clients first and last name

You or your team might have added a special character in a clients name like a Question Mark (?) which will be skipped during the export (This is a limitation of Windows as a folder or PDF can't be named with these characters). Before you start the bulk export you should remove special characters from the clients first and last name.

List of special characters not accepted by Microsoft Windows:

\ / : * ? " < > |

Search and remove any special characters using %SpecialCharacter% in eNoteFile.

The screenshot shows a web application window titled "Search Clients". The interface is divided into a search criteria section and a results table. The search criteria section includes input fields for "First Name", "Last Name", "Date of Birth" (with a date picker), "Address", "Home", and "Mobile". There is a "Show / Hide Search Criteria" dropdown menu and "Show All" and "Search" buttons. Below the search criteria is a table with the following headers: "Name", "Created Date", and "Last Modified Date".

What are the special Characters in my CSV

When the CSV export is completed, you can use [Microsoft Excel Replace Feature](#) to replace any special characters with the actual symbol. We've listed the main ones below:

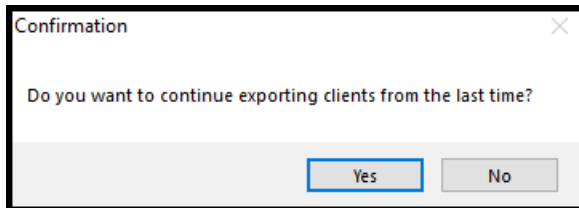
Special Character in CSV	Replace with actual symbol
+	SPACE
%2F	/ (Forward Slash)
%5C	\ (Back Slash)
%2C	, (Comma)
%09	TAB
%3A	: (Colon)
%27	' (Single Apostrophe)
%3F	? (Question Mark)
%40	@ (Email at symbol)
%0D%0A	NEWLINE
%23	#
%3B	;
%22	"
%26	&
%2B	+

Re-running the export

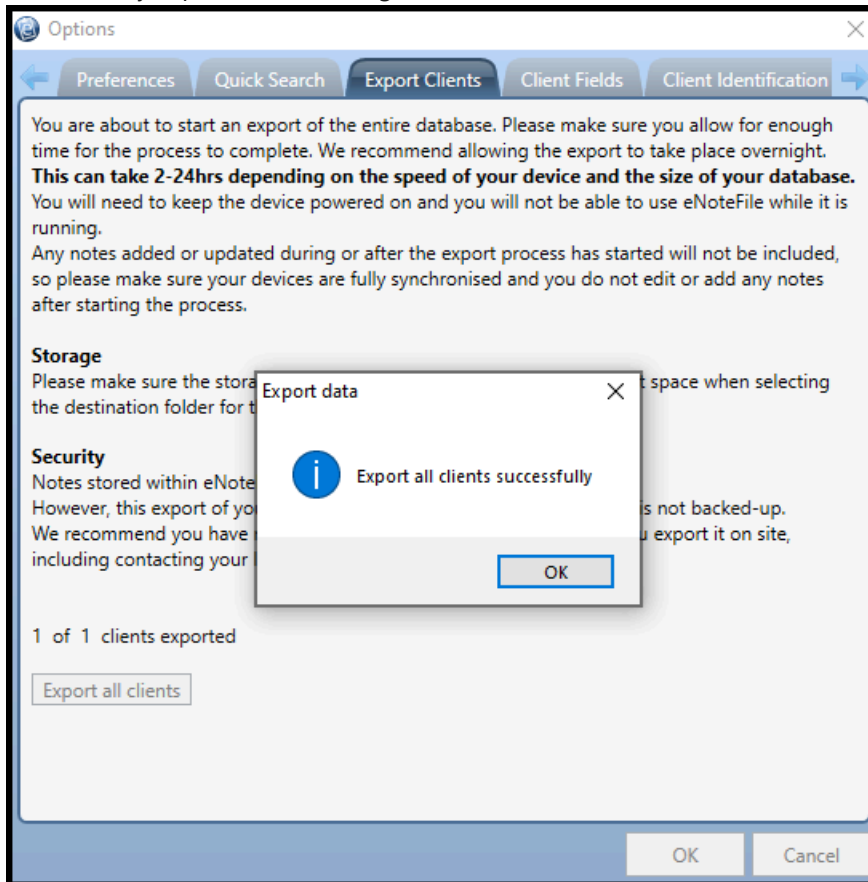
If you've had a failed export, you can re-run the export from the start. Or you can skip any successful exports and only export the remaining clients.

To run the export from where it stopped, follow the [steps above](#) and select the same export folder as you did previously. When you select a folder that has a "**FailedExportProject.txt**", you'll be asked to run the export again, click

Yes.



This will only export the remaining clients.



Computer restarted during export?

You'll need to re-export the clients.

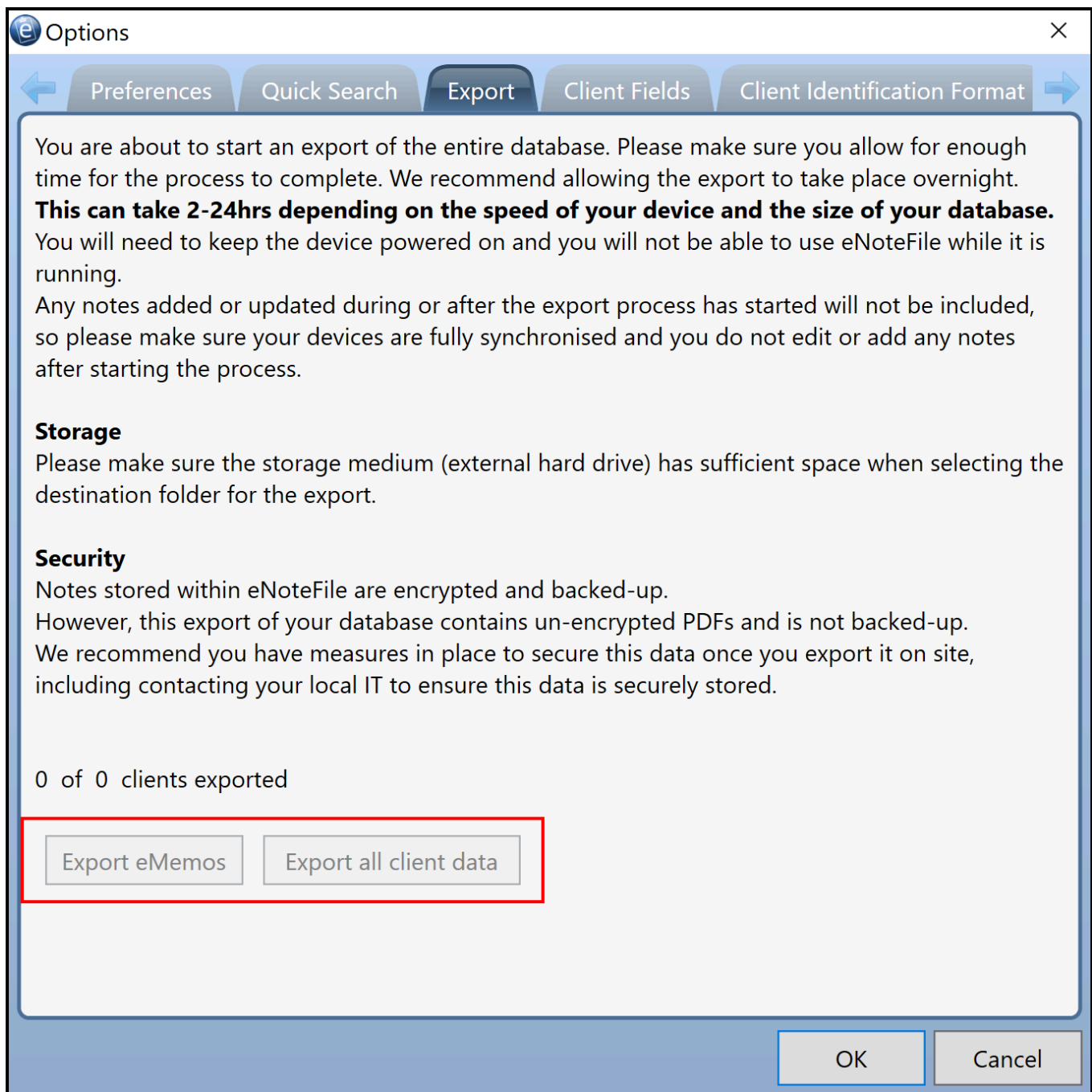
You can prevent your computer doing updates by pausing [Microsoft Windows Updates](#) for 7 days.

Make sure the computer doesn't go to sleep

- Prevent [Microsoft Windows from going to sleep](#)
- Use [Awake](#) by [Microsoft Power Toys](#) for a more advanced option.

Am I an Admin?

You are a **Standard user** and unable to Bulk Export if the export button is greyed out on the export tab.



Storing and securing notes during and after export

Storage

Please make sure the storage medium (external hard drive) has sufficient space when selecting the destination folder for the export.

Security

Notes stored within eNoteFile are encrypted and backed-up. However, this export of your database contains un-encrypted PDFs and is not backed-up. We recommend you have measures in place to secure this data once you export it on site, including contacting your local IT to ensure this data is securely stored.

NOTE: As with any further electronic use of your eNoteFile exported notes, attachments, and CSV file, no matter what alternative you choose, we recommend you engage your own IT support to ensure you always keep, maintain, backup and store a separate copy of your eNoteFile export securely as is, and only ever use a copy to integrate with another program.

Dropbox reconciliation message asking to remove/delete files

Please tick 'Don't ask me this again' and click 'Move out of Dropbox', similar to this:

