

**August 4, 2017**

Technical specification document –

Need\_Appts\_All\_Loc

# INTRODUCTION

# Objective

An automated report is required to show all the need appoints for every location for a given day

# Scope

# Job is scheduled to run every morning at 07:00 AM from the report server.

# Functionality

SSIS package is designed for this report, below are the activities the package performs

**Step 1 -** Fetch the Distinct locations from “**need\_appts\_all**” table

**Step 2 -** Fetch the Distinct locations from “**need\_appts\_all**” table

**Step 3 -** Takes one location and creates an excel file with name "**active\_patients\_with\_no\_future\_appointments.xls**" on the below path –

“**\\HPM-FS1\<Location Name>\Need Appointment Reports\Active\_Patients\_with\_No\_Future\_Appointments\_<Location Name>\_.xls**”

**Step 4 –** Insert locations data into excel file on above path.

**Step 5 –** Add’s Time and Steps Repeated for all the other locations.

1. **White Plain Locations -**

**Step 1 -** Delete the Existing file from the below location

**“**[**\\hpm-fs1\White Plains\Need Appointment Reports\Active\_Patients\_with\_No\_Future\_Appointments\_White Plains.xls**](file:///\\hpm-fs1\White%20Plains\Need%20Appointment%20Reports\Active_Patients_with_No_Future_Appointments_White%20Plains.xls)**”**

**Step 2 –** Creates Excel file on the path mentioned above.

**Step 3** - Fetch the data from “**need\_appts\_all**” table and insert into the already created excel file.

**Step 4 -** Send the file to the recipients

From “[**no-reply@healthplusmgmt.com**](mailto:no-reply@healthplusmgmt.com)**”**

To [**gklein@healthplusmgmt.com**](mailto:gklein@healthplusmgmt.com)**/** [**kwhelan@healthplusmgmt.com**](mailto:kwhelan@healthplusmgmt.com)

**Step 5 -** Copy the file to archive folder and rename it with date time

[**\\hpm-fs1\White Plains\Need Appointment Reports\Archive\Active\_Patients\_with\_No\_Future\_Appointments\_White Plains\_<Date Time>.xls**](file:///\\hpm-fs1\White%20Plains\Need%20Appointment%20Reports\Archive\Active_Patients_with_No_Future_Appointments_White%20Plains_%3cDate%20Time%3e.xls)

1. **Code “SSIS Package” Attached.**

 