

**August 1, 2017**

Technical specification document –

Salesforce\_Import\_Account

# INTRODUCTION

# Objective

An automated job is required to fetch data from account.csv file and insert all account details into “**Person table**”.

# Scope

# Job is scheduled to run every morning at 02:30 AM and afternoon at 02:30 PM from the production server and makes account file backup in archive folder

# Functionality

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

1. **Import Excel**

* Fetch data from path [**\\hpms.com\data\IKS\Salesforce\accounts.csv**](file:///\\hpms.com\data\IKS\Salesforce\accounts.csv)and insert data into temporary “**Temp\_Pesons**” table.
* Update Accounts if accounts already exists or any fields are changed

1. **Insert Data into "Temp\_person2" Table**

* Insert data into "**Temp\_Person2**" a temporary table from "**Temp\_Persons**” table.
* Each account insert into "**Temp\_person2**" table for all Practice using Cursor

1. **Update "Temp\_Person" Table Data**

Validate data between "**Temp\_Person2**" and "**Temp\_Person**" table if already exists then update.

1. **Insert into "Temp\_Person" Table**

* Match data between "**Temp\_Person2**" and "**Temp\_Person**" table and if there is new accounts in "**Temp\_Person2**" table then insert into "**Temp\_Person**" table.
* In "**Temp\_Person**" table the column "**Per\_Person\_Id**" is set as null at the time of new accounts are inserted.

1. **Accounts insert into Nextgen "Person" Table**

* Match data between "**Temp\_Person**" and "Person" table and if there is new accounts then insert into "**Person**" table or already exists then update.
* Data is also inserted in the below two tables after inserting data into "**Person**" table

1. **person\_association\_xref**
2. **patient\_enterprise\_chart**
3. **Update "Person\_id" into "Temp\_person’s" "Per\_person\_Id column" Table**

Update “**Person\_id**” into “**Temp\_Person**” column “**Per\_Person\_id**”, if “**Per\_Person\_id**” is null

1. **Code “SSIS Package” Attached.**

