

1. Gold Applicability Decision

Business Use Case	Gold Required (Yes / No)	Justification
Automated, Auditable Account Opening for New Clients	Yes	Agentic workflow requires consumption-ready, shaped datasets/outputs (account packets, workflow state, signature artifacts, audit logs).

2. Target Consumption Database Type

Business Use Case	Database Type (Data Warehouse / Vector Store / Both)	Evidence in Context
Automated, Auditable Account Opening for New Clients	Data Warehouse	Only operational, workflow, and audit output types required; BI, analytics, and vector retrieval are out of scope. Context lists only Data Warehouse as Gold platform.

3. Selected Gold Architectural/Modeling Pattern(s) — MUST BE EVIDENT

Category	Selected Pattern	Why It Was Selected (Context Evidence)	Pattern-Specific Structural Markers That MUST Appear in Output
DW	Star Schema	Purpose is agent/operational workflow consumption, not complex DW variant or SCD; artifacts naturally organize as facts/dims (account packets, state, artifacts); no evidence of constellation, Vault, or SCD need.	Fact (packet/audit/status), Dimension (client, custodian, envelope)

4. Use-Case Output → Gold Mapping (Scope Gate)

Use Case Required Output	Gold Artifact (Dataset/Entity/Index)	Consumption Interaction	Justification
Validated account packet	AccountPacketFact	Query/API Export	Agent consumption for packet assembly/submission; core workflow output.
Workflow state/exception artifact	WorkflowStateFact	Query/Feed	Drives real-time workflow coordination and agent/human-in-the-loop exception handling.
Signed forms/envelopes	SignatureEnvelopeFact	Query/Export	For submission and routing in workflow when signatures required.
Write-back state/artifact	WritebackStatusFact	Export/API Sync	Ensures lifecycle/status is synchronized to Salesforce/Edge & custodians as needed.
Audit logs/trace	AuditEventFact	Query/Export	Ensures complete workflow traceability and operational auditability (compliance required).
Reference/master data (for DW)	ClientDimension, CustodianDimension, Envelope_Dimension	Join/Reference	Needed for denormalized fact outputs; context-inferred, not directly consumed by users.

5. Gold Artifact Catalog (Concrete)

Gold Artifact Name	Category (DW / Vector Store)	Purpose	Input Layer(s)	Grain (Row/Object Meaning)
AccountPacketFact	DW	Final, agent-ready, validated account onboarding packet	Silver	One onboarding packet per client/account
WorkflowStateFact	DW	State/exceptions for agent/human workflow	Silver	One workflow state per state event/account
SignatureEnvelopeFact	DW	Envelope/form artifact for e-signature steps	Silver	One envelope artifact per required packet/event
WritebackStatusFact	DW	Write-back payload to orchestrate state transitions/status	Silver	One status update per system event/account
AuditEventFact	DW	Immutable workflow/audit trace log for operational review	Silver	One audit event per step/action
Client_Dimension	DW	Reference—client data for facts	Silver	One client record
Custodian_Dimension	DW	Reference—custodian/form metadata	Silver	One custodian/platform/form
Envelope_Dimension	DW	Reference—envelope, template, and artifact metadata	Silver	One envelope or artifact definition

6A. Gold Entity Definition (DW Only — Pattern-Explicit)

Gold Entity	Entity Role (MUST match selected DW pattern)	Belongs To (Dataset/Mart)	Source Silver/Bronze Entity/Table	Description
AccountPacketFact	Fact	AccountPacketFact	IntakeFormNormalized, Document_Metadata, CustodianFormIndex	Represents each completed, validated onboarding packet, ready for agent/custodian hand-off.
WorkflowStateFact	Fact	WorkflowStateFact	Workflow State Table, AuditEventLog	Models workflow state/transitions and exceptions per account.
SignatureEnvelopeFact	Fact	SignatureEnvelopeFact	EnvelopeMetadata, DocumentMetadata	Represents envelope artifacts for signatures within workflow.
WritebackStatusFact	Fact	WritebackStatusFact	Workflow State Table, AuditEventLog	Tracks state changes needing system write-back per account/event.
AuditEventFact	Fact	AuditEventFact	AuditEventLog	Stores audit events for traceability/replay.
Client_Dimension	Dimension	AccountPacketFact, WorkflowStateFact etc.	IntakeFormNormalized	Master data for clients (ID, name, type, etc).
Custodian_Dimension	Dimension	AccountPacketFact, SignatureEnvelopeFact	CustodianFormIndex	Master/reference for custodian platform/forms.
Envelope_Dimension	Dimension	SignatureEnvelopeFact	Envelope_Metadata	Master/lookup for envelope templates/artifact metadata.

6B. Gold Vector Index/Object Definition (Vector Store Only — Pattern-Explicit)

(Not applicable—Vector Store not selected in context)

7A. DW Attributes (No SQL Types)

Gold Entity	Attribute Name	Source Field (Silver/Bronze Path)	Attribute Role (Identifier/Measure/Descriptor/Metadata)	Required (Yes/No)
AccountPacketFact	packet_id	IntakeFormNormalized.form_id	Identifier	Yes
AccountPacketFact	client_id	IntakeFormNormalized.client_id	Dimension Reference	Yes
AccountPacketFact	custodian_id	CustodianFormIndex.custodian	Dimension Reference	Yes
AccountPacketFact	submission_timestamp	IntakeFormNormalized.submission_timestamp	Descriptor/Metadata	Yes
AccountPacketFact	validated_status	IntakeFormNormalized.validation_status	Descriptor/Metadata	Yes
AccountPacketFact	packet_status	IntakeFormNormalized.packet_status	Descriptor/Metadata	Yes
AccountPacketFact	error_flag	IntakeFormNormalized.error_flag	Descriptor/Metadata	No
AccountPacketFact	... (other fields)	(flattened, supporting fields)	Descriptor/Metadata	No

WorkflowStateFact	workfloweventid	Workflow State Table.eventid	Identifier	Yes
WorkflowStateFact	packetid	IntakeFormNormalized.formid	Dimension Reference	Yes
WorkflowStateFact	statetransition	Workflow State Table.state	Descriptor/Metadata	Yes
WorkflowStateFact	exceptiontype	Workflow State Table.exceptiontype	Descriptor/Metadata	No
WorkflowStateFact	reviewerid	Workflow State Table.reviewerid	Descriptor/Metadata	No
WorkflowStateFact	eventtimestamp	Workflow State Table.eventtimestamp	Metadata	Yes
SignatureEnvelopeFact	envelopeid	EnvelopeMetadata.envelopeid	Identifier	Yes
SignatureEnvelopeFact	packetid	EnvelopeMetadata.packetid (linked)	Dimension Reference	Yes
SignatureEnvelopeFact	envelopestatus	EnvelopeMetadata.status	Descriptor/Metadata	Yes
SignatureEnvelopeFact	doclink	EnvelopeMetadata.doc_link	Descriptor/Metadata	No
WritebackStatusFact	writebackid	Workflow State Table.writebackid	Identifier	Yes
WritebackStatusFact	packetid	IntakeFormNormalized.formid	Dimension Reference	Yes
WritebackStatusFact	statuscode	Workflow State Table.statuscode	Descriptor/Metadata	Yes
WritebackStatusFact	synctimestamp	Workflow State Table.synctimestamp	Metadata	Yes
AuditEventFact	auditeventid	AuditEventLog.auditeventid	Identifier	Yes
AuditEventFact	packetid	AuditEventLog.relatedformid	Dimension Reference	No
AuditEventFact	eventtype	AuditEventLog.eventtype	Descriptor/Metadata	Yes
AuditEventFact	eventtimestamp	AuditEventLog.eventtimestamp	Metadata	Yes
AuditEventFact	actorid	AuditEventLog.actor_id	Descriptor/Metadata	No
ClientDimension	clientid	IntakeFormNormalized.clientid	Identifier	Yes
ClientDimension	clientname	IntakeFormNormalized.clientname	Descriptor/Metadata	Yes
ClientDimension	householdid	IntakeFormNormalized.household_id	Descriptor/Metadata	No
CustodianDimension	custodianid	CustodianFormIndex.custodian	Identifier	Yes
CustodianDimension	custodianname	CustodianFormIndex.custodianname	Descriptor/Metadata	No
CustodianDimension	formid	CustodianFormIndex.formid	Descriptor/Metadata	No

EnvelopeDimension	envelopeid	EnvelopeMetadata.envelopeid	Identifier	Yes
EnvelopeDimension	templatename	EnvelopeMetadata.templatename	Descriptor/Metadata	No
EnvelopeDimension	doctype	EnvelopeMetadatadoctype	Descriptor/Metadata	No

7B. Vector Store Metadata Fields (Retrieval Support)

(Not applicable—Vector Store not selected in context)

8A. DW Relationships (Pattern-Consistent)

Parent Entity	Child Entity	Cardinality	Relationship Realization (Join/Bridge/Link)	Pattern Consistency Check (Pass/Fail)
Client_Dimension	AccountPacketFact	1:N	Join (client_id FK)	Pass
Custodian_Dimension	AccountPacketFact	1:N	Join (custodian_id FK)	Pass
Envelope_Dimension	SignatureEnvelopeFact	1:N	Join (envelope_id FK)	Pass
AccountPacketFact	WorkflowStateFact	1:N	Join (packet_id FK)	Pass
AccountPacketFact	SignatureEnvelopeFact	1:N	Join (packet_id FK)	Pass
AccountPacketFact	WritebackStatusFact	1:N	Join (packet_id FK)	Pass
AccountPacketFact	AuditEventFact	1:N (sparse)	Join (packet_id FK if present)	Pass

8B. Vector Retrieval Behavior (Pattern-Consistent)

(Not applicable—Vector Store not selected in context)

9. Shaping Rules (DW) / Indexing Rules (Vector Store) — Pattern-Tied

Gold Artifact	Category	Rule Type	Rule Description	Tied to Selected Pattern Marker (Yes/No)
AccountPacketFact	DW	Projection	All required fields for agent/custodian consumption, as shaped in a flat fact table	Yes
WorkflowStateFact	DW	Projection	Each change/transition mapped as a denormalized fact with packet and workflow detail	Yes
SignatureEnvelopeFact	DW	Projection	Each signature envelope records status, mapping to relevant dimension data	Yes
WritebackStatusFact	DW	Projection	Each write-back status change/event as denormalized fact	Yes
AuditEventFact	DW	Projection	Each audit or trace event as a fact row with supporting IDs/metadata	Yes
All Facts	DW	Star-Join Model	All fact tables reference appropriate dimension(s) by surrogate or business key	Yes
All Dimensions	DW	Reference Integrity	Each dimension provides 1:M join to associated fact(s); no conformed dimension needed here	Yes

10. Anti-Overbuild Guardrail (Explicit Non-Actions)

Scope (Artifact/Entity/Index)	Not Done Item (Extra Facts/Extra Dims/Extra Indices/ Generic Analytics/Reuse Layer/etc.)	Reason
AccountPacketFact	Aggregation, summary KPI, multi-use analytic fields, generic status history	Only immediate agent/custodian consumption required.
WorkflowStateFact	Workflow metrics/analytics, escalation stats, cross-packet rollups	Out of scope—serves just workflow state for assigned cases.
SignatureEnvelopeFact	Embedded audit trail, multi-form join, enveloping analytic summaries	Only tracks envelope artifact for routing; all else in audit/event facts.
WritebackStatusFact	BI metrics, external system writeback logs	Only operational state exports; logs are separately tracked.
AuditEventFact	Analytics, scoring, reports, dashboard KPIs	Serves operational audit trail for workflow traceability only.
Client/Custodian/ Envelope_Dimension	Conformed, integrated, or generalized master data for reuse	Only reference for this use case; not a general DIM layer.
Entire Gold Layer	BI cubes, pre-aggregation, SCD/Type2/analytics, star+snowflake hybrid	Star schema, single-use, consumption-specific Gold; not for analytics/BI.
Vector Indices/Objects	Any embedding, vector, or retrieval index	

Scope (Artifact/Entity/Index)	Not Done Item (Extra Facts/Extra Dims/Extra Indices/ Generic Analytics/Reuse Layer/etc.)	Reason
		Vector/semantic search out of scope—DW only, per project context.