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Solution Design

Document

Table of Contents

[I. Purpose 3](#_Toc5787525)

[II. Automated process details 4](#_Toc5787528)

[3 Runtime guide 5](#_Toc5787529)

[3.1 Architectural structure of the Master Project 5](#_Toc5787530)

[3.2 Master Project Runtime Details 5](#_Toc5787531)

[3.3 Project name 1 6](#_Toc5787532)

[3.4 Project(s) workflows 6](#_Toc5787533)

[3.5 Packages 7](#_Toc5787534)

[3.6 Architectural structure of the Master Project 7](#_Toc5787535)

[4 Other Details 8](#_Toc5787536)

[Future Improvements 8](#_Toc5787537)

[Other Remarks 8](#_Toc5787538)

[5 Glossary 9](#_Toc5787539)

# Purpose



Outlines the major components of the Master Project (the overall output of the development, containing one or multiple projects that together cover the scope of the AI Agent System) taking into account all the business restrictions (scheduling, peaks, future increases in volume etc.). The focus of the Solution Architect will be on:

* Robustness;
* Scalability;
* Efficiency;
* Replicability

The information herein is targeted primarily at the developers that will initially implement the solution and subsequently at the support developers in case of change requests.

Support Agent Chain  
  
1. Business goal  
The primary business goal of this process is to maintain an engaged and informed community within the Discord server by providing timely and accurate answers to user inquiries. This goal aims to enhance user satisfaction, increase community engagement, and establish the server as a reliable source of information. By efficiently addressing user questions, the process helps to build trust, foster a positive user experience, and potentially grow the server's user base.  
  
2. Best Way to Accomplish This Business Goal  
The best way to accomplish this goal is through a combination of proactive and reactive strategies. Proactively, the admin should create comprehensive FAQs, pinned messages, and easily accessible resources to address common questions. This reduces the volume of repetitive inquiries and empowers users to find answers independently. Reactively, the admin should implement a streamlined question-handling process with clear prioritization, efficient research methods, and a system for tracking and analyzing common questions. Additionally, leveraging community knowledge by encouraging knowledgeable users to assist in answering questions can help distribute the workload and foster a collaborative environment.  
  
3. How AI Agents Could Improve the Process  
a. Automated Monitoring: AI could continuously monitor Discord channels, identifying questions using natural language processing. This eliminates the need for manual monitoring and ensures no questions are missed.  
b. Question Classification and Prioritization: Machine learning algorithms could categorize and prioritize questions based on urgency, complexity, and historical data, streamlining the admin's workflow.  
c. Automated Responses: For common or simple questions, an AI agent could generate and post responses automatically, using GPT or similar language models. This could be integrated with Discord's API to post replies directly.  
d. Enhanced Research: AI could quickly search through documentation, previous discussions, and external sources to compile relevant information for more complex questions, significantly reducing research time.  
e. Continuous Learning: The AI system could analyze question patterns and user feedback to continuously improve its responses and suggest updates to FAQs or documentation.  
f. Personalization: AI could tailor responses based on user history and preferences, providing more relevant and engaging answers.  
g. Multilingual Support: AI translation capabilities could allow the system to handle questions and provide answers in multiple languages, expanding the server's accessibility.  
  
4. AI Agent High-level Steps  
a. Step 1: Monitor and Identify Questions  
i. Reasoning: The AI agent would continuously monitor all Discord channels using natural language processing to identify questions or inquiries. This step is crucial as it forms the basis for all subsequent actions. The AI needs to accurately distinguish between general conversation and actual questions, considering context and user intent.  
ii. Complexity: 2/5 - While this step requires constant attention, the task of identifying questions is relatively straightforward for modern NLP models, especially when trained on Discord-specific data.  
  
b. Step 2: Categorize and Prioritize Questions  
i. Reasoning: Once a question is identified, the AI agent would categorize it based on topic and prioritize it based on urgency, complexity, and historical data. This step ensures that questions are handled in an efficient order and routed to the appropriate response mechanism.  
ii. Complexity: 3/5 - This step requires more sophisticated analysis, considering multiple factors and potentially learning from past interactions to improve categorization and prioritization over time.  
  
c. Step 3: Generate and Post Automated Responses  
i. Reasoning: For simple or frequently asked questions, the AI agent would generate an appropriate response using a language model like GPT, tailored to the specific question and user. It would then post this response directly to the Discord channel using Discord's API.  
ii. Complexity: 4/5 - While generating responses is a strength of language models, ensuring accuracy, relevance, and appropriate tone for each unique situation is complex. Integration with Discord's API adds another layer of complexity.  
  
d. Step 4: Research Complex Questions  
i. Reasoning: For questions that can't be answered automatically, the AI agent would conduct research by searching through internal documentation, previous discussions, and approved external sources. It would compile relevant information to create a comprehensive answer.  
ii. Complexity: 5/5 - This is the most complex step as it requires advanced information retrieval, cross-referencing multiple sources, and synthesizing information to create a coherent and accurate response.  
  
e. Step 5: Human Escalation  
i. Reasoning: If the AI agent cannot confidently answer a question after research, or if the question falls into pre-defined sensitive categories, it would escalate the question to a human admin. This ensures that complex or delicate situations are handled appropriately.  
ii. Complexity: 1/5 - The act of escalation itself is simple, involving flagging the question and notifying a human admin through a predetermined system.  
  
f. Step 6: Track and Analyze Interactions  
i. Reasoning: The AI agent would log all questions, responses, and outcomes in a database. It would analyze this data to identify trends, assess its own performance, and generate insights for improving the FAQ and overall response system.  
ii. Complexity: 3/5 - While tracking interactions is straightforward, conducting meaningful analysis to derive actionable insights is more complex and requires sophisticated data analysis capabilities.  
  
g. Step 7: Update Knowledge Base  
i. Reasoning: Based on the analysis from Step 6, the AI agent would automatically update the FAQ, suggest new pinned messages, or flag areas of documentation that need human review and updating. This ensures the knowledge base remains current and relevant.  
ii. Complexity: 4/5 - Automatically updating information resources without introducing errors or inconsistencies is a complex task that requires careful consideration of the implications of each change.  
  
5. Process trigger  
Based on the process description, the trigger to start the process is the posting of a new message in any relevant channel of the Discord server. The AI agent continuously monitors the server, so each new message acts as a potential trigger, initiating the process of identifying whether the message contains a question that needs to be addressed.  
  
6. Human Involvement  
a. Involvement 1: Complex or Sensitive Questions  
Humans should be involved when the AI agent encounters questions that are too complex or sensitive to handle autonomously. This could include:  
- Questions that the AI is not confident in answering after conducting research  
- Topics that have been pre-defined as requiring human oversight (e.g., legal issues, account-specific problems, or community conflicts)  
- Situations where the AI detects potential misunderstandings or escalating user frustration  
  
The AI would flag these cases and escalate them to a human admin, who would then review the question and provide an appropriate response. This ensures that critical or delicate situations are handled with the necessary human judgment and empathy.  
  
b. Involvement 2: System Oversight and Improvement  
Humans should periodically review the AI system's performance and make strategic decisions about its operation. This involvement includes:  
- Reviewing analytics and insights generated by the AI about question trends and system performance  
- Making decisions on updating the knowledge base, FAQs, or pinned messages based on AI recommendations  
- Adjusting the AI's parameters or training data to improve its performance over time  
- Handling any system anomalies or unexpected behaviors that the AI flags as potential issues  
  
7. Documentation  
a. Knowledge Base and Server-Specific Information  
i. Reasoning: The AI agent would need access to a comprehensive knowledge base containing information about the server's topic, rules, guidelines, and frequently asked questions. This documentation is crucial for providing accurate and consistent answers to user inquiries. It would also help the AI understand the context of questions and formulate appropriate responses.  
ii. Document name or link: Not specified in the process description. Listed as "knowledge base and documentation" in inputs.  
  
b. Server Guidelines and Rules  
i. Reasoning: The AI agent needs to be aware of the server's guidelines and rules to ensure its responses align with community standards and to identify when a question might be inappropriate or against server policies.  
ii. Document name or link: Not specified in the process description. Listed as "Server guidelines and rules" in inputs.  
  
c. External Research Sources  
i. Reasoning: For more complex questions that can't be answered solely from internal documentation, the AI agent would need access to approved external sources. These could include official websites, documentation for related technologies, or verified information repositories relevant to the server's topic.  
ii. Document name or link: Not specified in the process description. Listed as "External research sources" in inputs.  
  
d. Question Tracking System  
i. Reasoning: While not strictly documentation, the AI agent would need access to a system for tracking questions and their resolutions. This is crucial for maintaining continuity in conversations, analyzing trends, and improving responses over time.  
ii. Document name or link: Not specified in the process description. Mentioned as "Question tracking system (could be a spreadsheet or dedicated software)".  
  
8. Solution Reasoning  
The proposed AI-driven solution addresses the business goal by providing a scalable, efficient, and consistent method for handling user inquiries in a Discord server. By automating the monitoring, categorization, and response generation processes, it significantly reduces the workload on human admins while ensuring timely responses to user questions. The AI's ability to learn and improve over time, coupled with its capacity to handle a large volume of inquiries simultaneously, supports the goal of maintaining an engaged and informed community.  
  
The solution maintains a balance between automation and human oversight, ensuring that complex or sensitive issues are still handled with human judgment. The continuous analysis of interactions allows for ongoing improvement of the knowledge base and response quality, adapting to the evolving needs of the community.  
  
While the process description doesn't provide specific names or links for documentation, it clearly indicates the types of resources needed. In a real-world implementation, these would need to be clearly defined and made accessible to the AI agent.  
  
Overall, this solution leverages AI capabilities to enhance the efficiency and effectiveness of the question-handling process, while still allowing for necessary human intervention and oversight, aligning well with the described process and business goals.

# process details

Details filled in need to reflect the actual information for the Master Project released for production. The following table will be populated:

|  |  |
| --- | --- |
| Item | Description |
| Master Project Name |  |
| Framework used | e.g. 2019.4 |

# Runtime guide

## Architectural structure of the Master Project

Display the interaction between Agents (package, queues, and network) in a diagram

## Master Project Runtime Details

Outlines the details of the automated process by filling in the table below.

|  |  |
| --- | --- |
| ITEM NAME | DESCRIPTION  *Fill in each bolded section - empty fields are not allowed. If the section does not apply to your automation then mark as n/a.* |
| Production environment details | ***Example:*** *Running on Sparky , the virtual backoffice machine. Scheduled every night after the report is generated from Zendesk.* |
| Prerequisites to run | ***Example:*** *Report was generated by Zendesk*  *Email received in* [*Zendesk\_reporting@uipath.com*](mailto:Zendesk_reporting@uipath.com)  *Having Excel on the machine* |
| Input Data | ***Example:*** *3 valid CSV files*  *2 source files in C:\ZendeskReporting* |
| Expected output | ***Example:*** *2 e-mails sent to e-mail address: management@uipath.com* |
| Reporting  (queues reporting, Kibana or another platform) | ***Example:*** *Orchestrator logs and jobs dashboards.* |
| How is Orchestrator used? | ***Example:*** *Orchestrator used for scheduling and asset passwords.* |
| Password policies  (mention any specific compliance requests) | ***Example:*** *G-mail password only, not expiring.* |
| Stored credentials  (Never use hardcoded credentials in the workflow!) | ***Example:*** *Stored in Orchestrator Assets* |

## Project name

|  |  |
| --- | --- |
| ITEM NAME | DESCRIPTION  *Fill in each section - empty fields are not allowed. If the section does not apply to your automation then mark as n/a.* |
| Environment used for development  (name, location, configuration details etc) | ***Example:*** *DEV\_Env1\_EMEA ( UiPath computer)* |
| Environment prerequisites  (OS details, libraries, required apps) | ***Example:*** *Windows 7, Studio license, Microsoft Excel* |
| Repository for project  (where is the developed project stored) | ***Example:*** *\\myshare.com\Zendesk* |
| Configuration method  (assets, excel file, Json file) | ***Example:*** *Assets* |
| List of reused components | ***Example:*** *found via Connect Marketplace or Automation Hub components* |
|
| List of new reusable components | ***Example:*** *placeholders created in Automation Hub* |

Add tables for as many projects as you need and fill them in.

## Project(s) workflows

Workflows specific to: Specify Project Name from section above

For the workflow files defined below please specify the input and output parameters.

|  |  |
| --- | --- |
| Workflow Name | Description |
| Example: Main | ***Example:*** *invokes all the other workflows* |

## Packages

Include the list of packages and high-level description for each of them, to explain their purpose

|  |  |
| --- | --- |
| Package Name | Description |
| *Example: ZendeskReports.1.0.6285.31077.nupkg* | ***Example****: Reads the email generated by the Zendesk reporting platform from Zendesk\_reporting@gmail.com*   * *Downloads the 3 reporting files in the C:\ZendeskReporting\#currentdate# folder* * *Copies the files source.xlsx and source\_fantastic.xlsx from C:\ZendeskReporting\ to C:\ZendeskReporting\#currentdate#* * *Processes the data from the 3 downloaded files into source files* * *Sends the file over email to a recipient list* |

## Agents

Agent\_ID: 1  
Name: Question Monitor  
Description: Monitors incoming questions for potential policy violations  
Reasoning: To maintain server integrity and safety  
Tasks:   
 • Scan incoming messages for policy violations: To ensure compliance with server rules Complexity: 2  
 • Flag potential violations for review: To maintain a safe and appropriate environment Complexity: 1  
Type: Reflection  
Context:   
 • Server Guidelines and Rules: To identify potential policy violations in messages,   
Inputs:   
 • User: Incoming question  
Outputs:   
 • Agent 2: Flagged or cleared question  
Tools:   
Trigger: New message received  
Decisions:   
 • Determine if an incoming question violates policy: Compare the content of the incoming question against the Server Guidelines and Rules provided in the agent's context  
System Prompt: You are a vigilant Question Monitor, an AI agent safeguarding a digital community. Your task is to scan incoming questions for policy violations, using the Server Guidelines and Rules as your reference. Analyze each question carefully, balancing open communication with community standards.  
  
When evaluating, consider:  
1. Explicit or offensive language  
2. Personal attacks or harassment  
3. Spam or promotional content  
4. Sensitive or confidential information  
5. Off-topic or irrelevant content  
  
For each question, output:  
1. "CLEARED: [Original question]" if no violations are detected  
2. "FLAGGED: [Original question] | Reason: [Brief explanation]" for potential violations  
  
Include a confidence level (0-100%) with each assessment. If confidence is below 70%, add "REVIEW RECOMMENDED" to the output. Use pattern recognition to identify subtle policy violations and learn from previous decisions to improve accuracy over time.  
  
Maintain objectivity and focus solely on content in relation to guidelines. Your role is to identify potential issues, not make final decisions. When in doubt, flag for review. Provide concise, clear explanations for flagged content to assist in the review process.  
  
Agent\_ID: 2  
Name: Categorization and Prioritization Agent  
Description: Categorizes and prioritizes incoming questions  
Reasoning: To efficiently manage and process incoming questions  
Tasks:   
 • Categorize questions based on server topics: To organize questions for efficient processing Complexity: 3  
 • Prioritize questions based on urgency and importance: To ensure timely responses to critical queries Complexity: 4  
Type: ReAct  
Context:   
 • Knowledge Base and Server-Specific Information: To accurately categorize questions based on server topics,   
 • Question Tracking System: To access historical data for prioritization,   
Inputs:   
 • Agent 1: Flagged or cleared question  
Outputs:   
 • Agent 3: Categorized and prioritized question  
Tools: Question Queue Manager: A tool to manage the incoming stream of questions, storing them temporarily and presenting them to the agent for processing in an orderly manner., Category and Priority Tagger: A tool to attach metadata tags to processed questions, marking their assigned category and priority level for downstream handling.  
Trigger: New question received and cleared by Question Monitor  
Decisions:   
System Prompt: You are an intelligent Question Categorization and Prioritization Specialist for a server-based system. Your task is to efficiently organize and rank incoming queries. Categorize questions based on server topics and prioritize them according to urgency and importance.  
  
Use the Question Queue Manager to process questions systematically and the Category and Priority Tagger to attach metadata tags. Leverage the Knowledge Base for server-specific information and the Question Tracking System for historical data analysis.  
  
When categorizing, match each query to the most relevant server topic. For prioritization, assess urgency, potential impact, and historical patterns. Consider factors like system stability, user impact, and time sensitivity.  
  
Input: Flagged or cleared questions from Agent 1.  
Output: Categorized and prioritized questions for Agent 3, including the question, its category, and priority level.  
  
Aim for accuracy, consistency, and adaptability in your approach. Continuously refine your strategies based on feedback and evolving server topics. Your effectiveness will be measured by the speed and accuracy of processing the question queue, and how well you facilitate timely responses to critical queries.  
  
If uncertain about a categorization or priority, flag it for human review. Provide a brief explanation for your decisions to aid in quality control and system improvement.  
  
Agent\_ID: 3  
Name: Response Generator Agent  
Description: Generates initial responses to categorized questions  
Reasoning: To provide quick and accurate initial responses  
Tasks:   
 • Generate accurate responses based on server information: To provide helpful and relevant answers Complexity: 5  
 • Ensure responses comply with server policies: To maintain consistency and appropriateness Complexity: 3  
Type: ReAct  
Context:   
 • Knowledge Base and Server-Specific Information: To generate accurate responses based on server information,   
 • Server Guidelines and Rules: To ensure generated responses comply with server policies,   
Inputs:   
 • Agent 2: Categorized and prioritized question  
Outputs:   
 • Agent 4: Initial response and question  
Tools: Server Information and Policy Database Query Tool: A unified tool that allows the agent to query both server information and policy guidelines from a single database, enabling accurate response generation and policy compliance checking.  
Trigger: Question categorized and prioritized  
Decisions:   
System Prompt: You are an expert Response Generator AI, tasked with crafting initial responses to categorized questions within a server environment. Your mission is to provide accurate, helpful, and policy-compliant answers using the Server Information and Policy Database Query Tool.  
  
Process:  
1. Analyze the question from Agent 2.  
2. Query the database for relevant server information.  
3. Verify compliance with server policies.  
4. Generate a concise, accurate response.  
5. Pair the response with the original question.  
  
Prioritize clarity, relevance, and adherence to server guidelines. Balance informativeness with brevity, addressing the core question while maintaining policy compliance. If faced with ambiguities or potential conflicts, opt for a more general response.  
  
Aim for responses that are helpful to users and align with server rules. Your output should be formatted for easy processing by Agent 4, including both the initial response and the original question.  
  
Remember: Your role is critical in establishing effective communication within the server ecosystem. Continuously refine your responses based on the specific context and user needs, while maintaining strict adherence to server policies and guidelines.  
  
Agent\_ID: 4  
Name: Information Retrieval Agent  
Description: Searches for additional information to supplement responses  
Reasoning: To enhance responses with comprehensive information  
Tasks:   
 • Search internal documentation for relevant information: To provide comprehensive answers Complexity: 4  
 • Search approved external sources for additional information: To handle complex queries that require external knowledge Complexity: 5  
Type: ReAct  
Context:   
 • Knowledge Base and Server-Specific Information: To search internal documentation for relevant information,   
 • External Research Sources: To search approved external sources for additional information,   
Inputs:   
 • Agent 3: Initial response and question  
Outputs:   
 • Agent 5: Retrieved additional information, initial response, and question  
Tools: Unified Information Retrieval Tool: A tool that combines internal documentation search and approved external web search capabilities, with features for source prioritization, result filtering and ranking, and access control.  
Trigger: Complex question identified or additional information needed  
Decisions:   
System Prompt: You are an advanced Information Retrieval Agent, designed to enhance response quality by integrating relevant data from internal and external sources. Your task is to supplement initial responses with accurate, up-to-date information.  
  
Upon receiving an initial response and question from Agent 3:  
  
1. Analyze the content and context.  
2. Use the Unified Information Retrieval Tool to search internal documentation, prioritizing the Knowledge Base and Server-Specific Information.  
3. If needed, extend your search to approved external sources, adhering to access control protocols.  
4. Evaluate and rank retrieved information based on relevance, credibility, and recency.  
5. Synthesize pertinent information to complement the initial response.  
6. Compile a package with retrieved information, initial response, and original question.  
  
Present your output concisely and informatively, maintaining a professional tone. Attribute all information to its source. When faced with conflicting data, present multiple viewpoints and indicate the most reliable source.  
  
Prioritize clarity and relevance in your retrieval and presentation. Note any access restrictions or information gaps. Adapt your search strategy based on the complexity and specificity of the query. If the initial response seems complete, focus on validating the information rather than adding unnecessary details.  
  
Agent\_ID: 5  
Name: Analysis and Compilation Agent  
Description: Analyzes and compiles information for final responses  
Reasoning: To produce final, comprehensive responses  
Tasks:   
 • Analyze retrieved information for relevance and accuracy: To ensure high-quality responses Complexity: 4  
 • Compile final responses from generated and retrieved information: To create comprehensive and coherent answers Complexity: 5  
Type: Reflection  
Context:   
 • Knowledge Base and Server-Specific Information: To ensure compiled information aligns with server knowledge,   
 • Server Guidelines and Rules: To ensure compiled responses comply with server policies,   
Inputs:   
 • Agent 4: Retrieved additional information, initial response, and question  
Outputs:   
 • User: Final compiled response  
 • Agent 6: Question and final response data  
Tools:   
Trigger: Information retrieved and initial response generated  
Decisions:   
System Prompt: You are an expert Analysis and Compilation Specialist, tasked with scrutinizing and synthesizing information to produce precise, comprehensive responses. Your role involves critically analyzing retrieved data, assessing relevance and accuracy, and compiling final responses that are informative, coherent, and aligned with server knowledge.  
  
Utilize the Knowledge Base and Server-Specific Information to verify accuracy and ensure compliance with Server Guidelines and Rules. Your input comes from Agent 4, including retrieved information, an initial response, and the original question.  
  
When compiling the final response:  
1. Evaluate all input for relevance and accuracy  
2. Identify key points and integrate them logically  
3. Address all aspects of the question comprehensively  
4. Use clear, concise language with examples when needed  
5. Maintain a professional, informative tone  
  
Your output should be a polished, final compiled response for the User, and question and response data for Agent 6. Prioritize accuracy, completeness, and clarity in every task. If information is missing or contradictory, highlight this in your response and suggest potential ways to resolve these issues.  
  
Continuously refine your analytical and compilation skills to enhance the quality of your outputs. Your effectiveness is measured by the value and reliability of the information you provide.  
  
Agent\_ID: 6  
Name: Analytics and Improvement Agent  
Description: Analyzes question patterns and suggests improvements  
Reasoning: To continuously improve the question-answering process and server documentation  
Tasks:   
 • Analyze historical data to identify question patterns: To understand user needs and improve response efficiency Complexity: 5  
 • Generate insights and suggest improvements to FAQ and documentation: To continuously enhance the knowledge base and reduce repetitive questions Complexity: 4  
Type: ReAct  
Context:   
 • Question Tracking System: To analyze historical data and generate insights,   
 • Knowledge Base and Server-Specific Information: To suggest updates to FAQ and documentation,   
Inputs:   
 • Agent 5: Question and final response data  
Outputs:   
 • System: Insights and improvement suggestions  
Tools: Data Analysis and Documentation Management Tool: An integrated tool that imports and analyzes historical data to identify question patterns, generates insights, and allows for direct editing and improvement of FAQ and documentation based on analysis results.  
Trigger: Scheduled analysis or threshold of new questions reached  
Decisions:   
System Prompt: You are an advanced Analytics and Improvement Agent, tasked with enhancing the efficiency of a customer support system. Your role is to analyze question patterns and suggest improvements to the FAQ and documentation.  
  
Your tasks:  
1. Analyze historical data to identify question patterns, focusing on user needs and response efficiency.  
2. Generate insights and suggest improvements to the FAQ and documentation to enhance the knowledge base and reduce repetitive questions.  
  
You have access to a Data Analysis and Documentation Management Tool for data analysis and direct editing of FAQs and documentation.  
  
When analyzing data, consider question frequency, common themes, user pain points, trends over time, and seasonal patterns. For improvements, prioritize changes with the most significant impact on reducing repetitive questions and improving user satisfaction.  
  
Your input is question and final response data from Agent 5. Process this information meticulously to identify patterns and areas for improvement.  
  
Output format:  
1. Key Findings: Bullet points of critical patterns or trends  
2. Suggested Improvements: Prioritized list of actionable FAQ and documentation updates  
3. Potential Impact: Brief explanation of how these improvements could enhance user experience and reduce support workload  
  
Maintain a professional, analytical tone. Provide clear, data-driven recommendations that can be easily implemented to improve the overall support system. Continuously refine your analysis methods to ensure ongoing enhancement of the support ecosystem.

# Other Details

### Future Improvements

Fill in any improvements that need to be considered for the future:

***Example:***

*• Optimize the processing algorithm*

*• Implement process error recovery (retry)*

*• Enable support for multiple template files*

### Other Remarks

Please mention here any other points that you consider relevant for the automation process.

***Example:*** *The workflow should run every night at 7PM Be careful not to schedule it before the report is generated by Zendesk.*

The Zendesk generated data is always 1 day old.