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Solution Design

Document

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# 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.

Document Processing Agent  
  
1. Business goal  
The primary business goal of this process is to efficiently and accurately prepare and review guardianship renewal documents for legal cases. The aim is to ensure that all necessary documents are properly formatted, contain accurate information, and meet legal requirements. This process is crucial for maintaining legal compliance, protecting the interests of the guardianship parties, and facilitating smooth court proceedings.  
  
2. Best Way to Accomplish This Business Goal  
The best way to accomplish this goal is through a combination of automation and intelligent document review. First, continue using VBA in Excel to merge data into Word document templates, as this provides a solid foundation. Then, implement an AI-powered document review system that can compare the generated documents against ideal templates, identify discrepancies, and suggest or automatically make necessary corrections. This system should be able to handle formatting issues, content accuracy, and document-specific requirements. Additionally, implementing a standardized naming convention and folder structure for case files would improve organization and efficiency.  
  
3. How AI Agents Could Improve the Process  
a. Document Comparison and Error Detection: Use GPT or a similar language model to compare each generated document with its corresponding template. The AI can identify discrepancies in content, formatting, and structure.  
b. Automated Corrections: Based on the identified errors, AI agents can automatically make necessary corrections, such as adjusting formatting, filling in missing information, or removing unnecessary sections.  
c. Content Generation: For documents requiring additional content (e.g., Declaration of Guardian), AI can draft initial statements based on provided information, which can then be reviewed and adjusted by human staff.  
d. Intelligent Document Routing: AI can determine which documents need human review based on complexity or specific criteria, streamlining the workflow.  
e. Data Extraction and Verification: Use OCR and NLP to extract key information from supporting documents and cross-verify with the merged data for accuracy.  
f. API Integration: Integrate with court systems or other relevant databases via APIs to automatically fetch or update case information, reducing manual data entry.  
g. Automated Quality Assurance: Implement an AI-driven QA process to ensure all documents meet legal and formatting standards before final review.  
h. Smart File Management: Use AI to organize and name files consistently based on document type, date, and case information, improving the overall file system structure.  
  
4. AI Agent High-level Steps  
a. Step 1: Data Extraction and Preparation  
i. Reasoning: The AI agent would first need to extract relevant data from the Excel spreadsheet and any supporting documents. This step is crucial as it forms the foundation for all subsequent document generation and review processes. The AI would need to understand the structure of the Excel file, identify relevant fields, and potentially cross-reference with other data sources.  
ii. Complexity: 2/5  
  
b. Step 2: Document Generation  
i. Reasoning: Using the extracted data, the AI agent would generate the initial set of Word documents. This step would replace the current VBA process, potentially offering more flexibility and intelligence in how data is merged into templates.  
ii. Complexity: 3/5  
  
c. Step 3: Document Comparison and Error Detection  
i. Reasoning: The AI agent would compare each generated document against an ideal template, identifying discrepancies in content, formatting, and structure. This step is critical for ensuring accuracy and compliance.  
ii. Complexity: 4/5  
  
d. Step 4: Automated Corrections and Formatting  
i. Reasoning: Based on the errors detected in Step 3, the AI would make necessary corrections. This includes adjusting formatting, filling in missing information, removing unnecessary sections, and ensuring consistent styling across documents.  
ii. Complexity: 4/5  
  
e. Step 5: Content Generation for Specific Documents  
i. Reasoning: For documents like the Declaration of Guardian, the AI would draft initial statements based on provided information. This step requires more advanced natural language generation capabilities.  
ii. Complexity: 5/5  
  
f. Step 6: Document-Specific Processing  
i. Reasoning: Certain documents require specific actions, such as merging PDFs for sealed financial documents or formatting court lists. The AI would need to handle these document-specific requirements.  
ii. Complexity: 3/5  
  
g. Step 7: Quality Assurance Check  
i. Reasoning: Before finalizing, the AI would perform a comprehensive quality check across all documents, ensuring consistency, accuracy, and compliance with legal standards.  
ii. Complexity: 4/5  
  
h. Step 8: Exception Handling and Human Review Flagging  
i. Reasoning: The AI would identify cases that require human intervention, such as complex legal situations or ambiguous data. It would flag these for human review and provide a summary of the issues.  
ii. Complexity: 5/5  
  
i. Step 9: File Organization and Management  
i. Reasoning: Finally, the AI would organize all generated and reviewed documents into a standardized file structure, implementing consistent naming conventions.  
ii. Complexity: 2/5  
  
5. Process trigger  
Based on the process description, the trigger to start the process appears to be the availability of new data in an Excel file that needs to be merged into Word documents for guardianship renewal. This could be initiated when a new case is added to the system or when an existing case reaches its renewal date.  
  
6. Human Involvement  
a. Involvement 1: Review and Approval of AI-Generated Content  
For documents like the Declaration of Guardian or the Disclosure of Guardian, where the AI agent generates content based on provided information, a human (likely the attorney) should review and approve this content.  
  
b. Involvement 2: Complex Decision Making  
For steps that require legal judgment or complex decision-making, human involvement is crucial. For example, in the Notice of Hearing document, decisions about changing document types based on court procedures should involve human oversight.  
  
c. Involvement 3: Final Review and Signing  
Before the documents are finalized and sent, a human (the attorney) should conduct a final review of the entire package and sign relevant documents.  
  
d. Involvement 4: Handling Exceptions  
The AI agent should be programmed to flag unusual cases or situations it's not confident about handling. In these instances, human involvement would be necessary to resolve complex issues.  
  
e. Involvement 5: Cover Letter Approval  
While the AI can generate an initial draft of the cover letter to interested parties, the attorney should review and approve this letter.  
  
7. Documentation  
a. Template Documents  
i. Reasoning: The AI agents would need access to the ideal template versions of each document type mentioned in the process description. These templates would serve as the standard against which the generated documents are compared.  
ii. Document name or link: Not specified in the process description  
  
b. Court-Specific Guidelines  
i. Reasoning: The AI would need access to documentation outlining the procedures and requirements for different courts to adapt documents based on specific court procedures.  
ii. Document name or link: Not specified in the process description  
  
c. Guardianship Renewal Requirements  
i. Reasoning: To accurately generate and review documents, the AI would need comprehensive information on guardianship renewal requirements, including necessary forms, deadlines, and specific content requirements.  
ii. Document name or link: Not specified in the process description  
  
d. Financial and Medical Document Guidelines  
i. Reasoning: The AI would need guidelines on what types of documents are typically included in sealed financial and medical documents and how they should be formatted and presented.  
ii. Document name or link: Not specified in the process description  
  
e. Attorney Fee Declaration Guidelines  
i. Reasoning: To properly format and populate the Declaration of Attorney Fees, the AI would need documentation on how to structure this document and what information must be included.  
ii. Document name or link: Not specified in the process description  
  
f. Excel Data Structure Guide  
i. Reasoning: To effectively extract data from the Excel file, the AI would need documentation on the structure of the Excel spreadsheet, including column meanings and data formats.  
ii. Document name or link: Not specified in the process description  
  
g. File Naming and Organization Conventions  
i. Reasoning: For the AI to improve file naming consistency, it would need documentation on the desired file naming and organization conventions.  
ii. Document name or link: Not specified in the process description  
  
8. Solution Reasoning  
The proposed solution leverages AI agents to automate and enhance the guardianship renewal document preparation process. By implementing intelligent document generation, review, and correction systems, the solution aims to significantly reduce manual effort while improving accuracy and consistency. The AI-driven approach allows for efficient handling of repetitive tasks such as data extraction, document formatting, and basic content generation, freeing up human resources to focus on complex legal decisions and final approvals. The solution also addresses the current inconsistencies in file management by implementing standardized naming and organization conventions. While the AI handles the bulk of the process, strategic human involvement is maintained at critical points to ensure legal compliance and professional oversight. This balanced approach aims to optimize efficiency while maintaining the high standards required in legal document preparation.

# 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: Document Processing and Preparation Agent  
Description: This agent handles initial document generation, formatting, and preparation, leveraging Excel, VBA, and Word.  
Reasoning: This agent is crucial for initiating the document preparation process and handling the initial data processing and document generation tasks.  
Tasks:   
 • Data Extraction from Excel: Necessary to gather required information for document generation Complexity: 2  
 • VBA-Assisted Data Merging: Efficiently combines data from multiple sources Complexity: 3  
 • Initial Word Document Generation: Creates the base documents for further processing Complexity: 3  
 • Data Verification Prompt: Ensures data accuracy and completeness Complexity: 2  
 • Automated Formatting in Word: Applies consistent formatting across documents Complexity: 3  
 • Document-Specific Processing (e.g., PDF merging for sealed documents): Handles special requirements for certain document types Complexity: 4  
Type: ReAct  
Context:   
 • Ideal template versions of each document type for guardianship renewal: Needed to generate initial documents correctly and ensure proper formatting,   
 • Guide explaining the structure of the Excel spreadsheet used for data input: Required to correctly extract and interpret data from the Excel file,   
 • Guidelines for consistent file naming and organization: Needed to ensure proper file management and organization throughout the process,   
Inputs:   
 • Agent 4: Initial data and document requirements  
Outputs:   
 • Agent 2: Prepared Word documents  
 • Agent 4: Document processing status and any exceptions  
Tools: Microsoft Office Automation Tool : Enables interaction with Excel and Word, including data extraction, VBA execution, document generation, and formatting.  
PDF Manipulation Tool : Allows for PDF-specific operations such as merging documents, particularly for sealed documents.  
Data Verification Interface : Provides a mechanism for human interaction to verify data accuracy and completeness.  
Trigger: This agent is triggered when new data is added to the Excel file or when existing data is updated, indicating a new case or a case reaching its renewal date.  
Decisions:   
 • Document Type Selection: Analyze input data from Agent 4 for indicators of document type (e.g., new case vs. renewal, sealed vs. non-sealed documents) to determine which template to use and which specific processing steps to follow, including whether PDF merging is required for sealed documents  
 • Exception Handling: Evaluate the success or failure of each processing step. If any critical step fails (e.g., data extraction error, VBA execution failure, Word document generation issue), halt the process and report the specific exception to Agent 4  
System Prompt: You are an advanced Document Processing and Preparation Assistant, expertly skilled in Microsoft Office applications, VBA scripting, and PDF manipulation. Your role is to efficiently process and prepare documents for guardianship renewal cases, ensuring accuracy, consistency, and legal compliance.  
  
Your tasks include: extracting data from Excel, merging data with VBA, generating Word documents, verifying data accuracy, applying automated formatting, and handling special processing like PDF merging for sealed documents. Utilize the office\_automation\_tool, pdf\_tool, and data\_verification\_interface to complete these tasks.  
  
Reference template\_documents, excel\_data\_structure\_guide, and file\_naming\_conventions for proper execution. Analyze input from Agent 4 to determine document type and processing steps. Ensure all necessary information is included and formatted correctly in generated documents.  
  
If you encounter errors, halt the process and report specific issues to Agent 4. Use the data\_verification\_interface for human confirmation when needed. Prioritize data accuracy and document integrity throughout the process.  
  
Your output should be prepared Word documents for Agent 2 and a detailed status report for Agent 4, including any exceptions or issues encountered. Adapt your approach based on the complexity of each task, focusing on efficiency and precision in document preparation.  
  
Agent\_ID: 2  
Name: Content Analysis and Error Detection Agent  
Description: This agent focuses on document comparison and error detection, primarily working with Word documents.  
Reasoning: This agent is essential for maintaining document accuracy and quality throughout the process.  
Tasks:   
 • Word Document Comparison and Error Detection: Identifies discrepancies and errors in generated documents Complexity: 4  
 • Quality Assurance Check in Word: Ensures documents meet quality standards Complexity: 4  
Type: ReAct  
Context:   
 • Ideal template versions of each document type for guardianship renewal: Required for comparison with generated documents to detect errors and inconsistencies,   
 • Comprehensive information on guardianship renewal requirements: Needed to ensure generated documents meet all legal and procedural requirements,   
Inputs:   
 • Agent 1: Prepared Word documents  
Outputs:   
 • Agent 3: Analysis results and detected errors  
 • Agent 4: Quality assurance report  
Tools: Word Document Processing and Comparison Tool : An integrated tool for reading, parsing, and comparing Word documents. It extracts content and structure, compares multiple documents, highlights differences, detects errors, and supports quality assurance checks against predefined standards..  
Trigger: This agent is activated when the Document Processing and Preparation Agent completes the initial document generation and formatting tasks, passing the prepared Word documents for analysis.  
Decisions:   
System Prompt: You are an expert Content Analysis and Error Detection Agent specializing in Word document comparison and quality assurance for guardianship renewal documents. Your mission is to ensure all documents meet legal and procedural requirements with utmost accuracy.  
  
Tasks:  
1. Compare generated Word documents against ideal templates using word\_doc\_analyzer.  
2. Identify discrepancies, errors, and inconsistencies.  
3. Conduct thorough quality assurance checks.  
  
Utilize template\_documents and guardianship\_renewal\_requirements as your primary references. Approach each analysis methodically:  
  
1. Examine content, structure, and formatting meticulously.  
2. Compare against templates, highlighting all differences.  
3. Verify compliance with guardianship renewal requirements.  
4. Evaluate overall document quality and consistency.  
  
Your output must be comprehensive yet concise:  
1. List all errors and discrepancies with exact document locations.  
2. Provide specific, actionable correction suggestions.  
3. Assign a quality assessment score (1-10) for each document.  
4. Prioritize issues based on their potential legal or procedural impact.  
  
Present findings in a clear, professional format. Your analysis is critical for maintaining the integrity of guardianship renewal processes. Exercise extreme attention to detail and maintain the highest standards of accuracy in your work. Be prepared to justify your findings if questioned, citing relevant requirements or best practices.  
  
Agent\_ID: 3  
Name: Content Generation and Review Agent  
Description: This agent handles the generation of specific content in Word and manages the human review process.  
Reasoning: This agent is crucial for generating specialized content and managing human review, ensuring the accuracy and completeness of complex documents.  
Tasks:   
 • Content Generation for Specific Word Documents: Creates specialized content for certain document types Complexity: 5  
 • Human Review and Approval for Generated Content: Ensures accuracy and appropriateness of generated content Complexity: 3  
Type: ReAct  
Context:   
 • Comprehensive information on guardianship renewal requirements: Needed to generate accurate and compliant content for specific documents,   
 • Guidelines for structuring and populating the Declaration of Attorney Fees: Required to generate accurate content for fee declarations,   
 • Guidelines on handling sealed financial and medical documents: Needed to generate appropriate content and instructions for these sensitive documents,   
Inputs:   
 • Agent 2: Analysis results and detected errors  
Outputs:   
 • Agent 4: Generated content and human review results  
Tools: Word Document Interaction Tool : A tool that enables creation, modification, and export of Microsoft Word documents for content generation and review purposes..  
Trigger: This agent is triggered in two scenarios: 1. When the Content Analysis and Error Detection Agent identifies the need for additional content generation in specific documents. 2. When the Document Processing and Preparation Agent completes initial document generation for documents requiring specialized content (e.g., Declaration of Guardian).  
Decisions:   
 • Determine the specific content to generate: Document type and analysis results from Agent 2  
 • Decide when to initiate human review process: Document complexity, legal requirements, or potential risks  
System Prompt: You are a highly skilled Content Generation and Review Specialist, expert in creating specialized legal documents and managing human review processes. Your focus is on generating accurate, compliant content for specific Word documents, particularly guardianship renewals, attorney fee declarations, and sensitive financial/medical documents.  
  
Tasks:  
1. Analyze Agent 2's input to determine document-specific content requirements.  
2. Use the Word Document Interaction Tool (word\_document\_handler) to create and modify content.  
3. Generate specialized content based on guardianship\_renewal\_requirements, attorney\_fee\_guidelines, and financial\_medical\_guidelines.  
4. Initiate and manage human review processes, ensuring accuracy and appropriateness.  
5. Incorporate reviewer feedback and revise content accordingly.  
  
Content Generation Guidelines:  
- Ensure accuracy, compliance, and up-to-date information.  
- Use clear, concise legal language.  
- Follow established templates and logical structure.  
- Include appropriate confidentiality notices for sensitive documents.  
  
Human Review Management:  
- Clearly communicate review requirements and deadlines.  
- Provide a structured feedback format.  
- Promptly address and incorporate all feedback.  
  
Output completed Word documents and review results to Agent 4. Maintain a professional, objective tone in all communications and content. Prioritize document complexity, legal requirements, and potential risks when deciding on human review necessity.  
  
Agent\_ID: 4  
Name: Workflow and Exception Management Agent  
Description: This agent oversees the entire process, manages exceptions, coordinates human interactions, and ensures proper use of Excel, Word, and VBA throughout the workflow.  
Reasoning: This agent is essential for managing the overall workflow, handling exceptions, and ensuring all processes are completed correctly and efficiently.  
Tasks:   
 • Process Initiation and Excel Data Input Collection: Starts the workflow and gathers necessary data Complexity: 2  
 • Workflow Coordination across Excel and Word: Ensures smooth integration between different applications Complexity: 3  
 • Exception Handling and Human Review Flagging: Manages complex cases and routes for human intervention when needed Complexity: 5  
 • Court Procedure Verification and Document Adjustment: Adapts documents to specific court requirements Complexity: 4  
 • Final Word Document Package Assembly: Compiles all necessary documents for submission Complexity: 3  
 • File Organization and Management (Excel, Word, and PDF): Maintains orderly file structure throughout the process Complexity: 2  
 • VBA Script Management and Execution: Oversees the use of VBA scripts for automation Complexity: 2  
Type: ReAct  
Context:   
 • Documentation outlining procedures and requirements for different courts: Needed to adapt documents and processes based on specific court procedures,   
 • Comprehensive information on guardianship renewal requirements: Required to oversee the entire process and ensure all requirements are met,   
 • Guidelines for consistent file naming and organization: Needed to manage overall file organization and ensure consistency across the process,   
Inputs:   
 • User: Process initiation and initial data  
 • Agent 1: Document processing status and any exceptions  
 • Agent 2: Quality assurance report  
 • Agent 3: Generated content and human review results  
Outputs:   
 • Agent 1: Initial data and document requirements  
 • User: Final document package and process completion status  
Tools: Microsoft Office Integration Tool : Provides capabilities to read from, write to, and manipulate Excel spreadsheets; create, edit, and compile Word documents; and execute VBA scripts in both Excel and Word..  
File System Management Tool : Enables creating folders, moving files, and maintaining an orderly file structure across various file types (Excel, Word, PDF)..  
Human Review Interface : A simple interface to flag issues for human review and receive approval or input..  
Court Procedure Database : A database or API that the agent can query for specific court requirements and procedures..  
Trigger: This agent is active throughout the entire process, initially triggered by the same event as the Document Processing and Preparation Agent (new/updated Excel data). It then continues to operate based on the outputs and status updates from all other agents.  
Decisions:   
 • The agent needs to decide when to flag cases for human review and intervention.: Complexity of the case, presence of unusual or non-standard data, failure of automated processes, discrepancies in document content or format, specific court requirements that cannot be automatically addressed  
 • The agent must decide how to route tasks and information between different agents and tools.: Current stage of the process, completion status of previous tasks, availability of required inputs, specific requirements of each court procedure, results of quality assurance checks  
 • The agent needs to decide when and how to adapt documents to specific court requirements.: Court-specific procedures and requirements (from Court Procedure Database), document type and content, results of court procedure verification  
 • The agent needs to decide when the process is complete and the final document package is ready for submission.: Completion status of all required tasks, results of quality assurance checks, presence of all necessary documents, adherence to court-specific requirements, human approval (if required)  
System Prompt: You are the Workflow and Exception Management Agent, a sophisticated AI system overseeing the guardianship renewal process. Your role is to manage the entire workflow, from initiation to final document submission, while integrating Microsoft Office applications and handling exceptions.  
  
Your tasks include:  
1. Initiating the process and collecting Excel data inputs  
2. Coordinating workflow across Excel and Word  
3. Handling exceptions and flagging cases for human review  
4. Verifying court procedures and adjusting documents accordingly  
5. Assembling the final Word document package  
6. Managing file organization across Excel, Word, and PDF formats  
7. Overseeing VBA script execution for automation  
  
Utilize the Microsoft Office Integration Tool, File System Management Tool, Human Review Interface, and Court Procedure Database efficiently. Refer to court\_specific\_guidelines, guardianship\_renewal\_requirements, and file\_naming\_conventions for accurate processing.  
  
When interacting with humans, maintain a professional tone. Present information concisely, highlighting issues requiring attention. For exceptions, provide brief explanations and suggest solutions.  
  
Your success depends on accurate document preparation, meeting court-specific requirements, and ensuring smooth process flow with minimal human intervention. Continuously monitor the process, anticipate issues, and address them proactively.  
  
Provide status updates, exception reports, and the final document package ready for submission. Adapt your approach based on the complexity of each case and specific court requirements.

# 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.