# SolUtion Design guide

## 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.* |
| Prerequisites to run | *Data Engineering team has a job that runs to pull all declined loans from the previous day. That data is then sent to the Orchestrator Queue. This data contains the borrower’s last name and application number.* |
| Input Data | *Borrower Last Name and Loan Number* |
| Expected output | ***Single pdf file containing all Adverse Action letters and Disclosures***  ***All loans updated database flag to Y for Closed Loan*** |
| How to start the automated process | *The process will be started from orchestrator server* |
| Reporting  (queues reporting, Excel log or another platform) | *Orchestrator logs and jobs dashboards.*  *PowerBI Report* |
| How is Orchestrator used? | *Orchestrator used for scheduling and asset passwords.* |
| Password policies  (mention any specific compliance requests) | *N/A* |
| Stored credentials  (Never use hardcoded credentials in the workflow!) | *Stored in Orchestrator Assets* |
| List of queues names | ***REF\_Encompass\_Adverse\_Action\_Letters***  ***REF\_Encompass\_Adverse\_Action\_Letters\_PROD*** |
| Schedule Details | *The 1st of every month at 8AM* |

## Project(s) workflows

A screenshot of a computer

Description automatically generated

|  |  |
| --- | --- |
| Workflow Name | Description |
| Main | *Invokes all the other workflows*   * End process: * Collects all pdf’s created and combines into one pdf |
| Main(Autosaved) | *Not used* |
| Create\_Adverse\_Action\_Letters | *Workflow that:*   * Assign Loan Number and Borrower name arguments to variables. * Launch Encompass * Bring Loan into focus. * Navigate to Forms (remove all but Statement of Denial) * Print to file .pdf * Updates database with Closed Y flag * Close loan in focus, then repeats for all loans in queue |
| Create\_Adverse\_Action\_Letters2 | *Not used* |
| Load\_Queue | *Not used* |
| Work the PDF | *Takes each pdf set and breaks it into 3 pages, then inserts the Notice to the set.* |

## Packages

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

|  |
| --- |
| Package Name |
|  |