# 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 | *Report was generated by Cognos*  *Report received in Cognos Reports Folder* [\\D01-PW-JHAUTIL01\Cognos\_Reports\Production\HELOC Customer Notification Report.xlsx](file:///\\D01-PW-JHAUTIL01\Cognos_Reports\Production\HELOC%20Customer%20Notification%20Report.xlsx)  *Excel*  *Word* |
| Input Data | ***1 file:*** [HELOC Customer Notification Report.xlsx](file:///\\D01-PW-JHAUTIL01\Cognos_Reports\Production\HELOC%20Customer%20Notification%20Report.xlsx) |
| Expected output | ***PDF file of all notices combined***  ***Saved to InfoImage output folder:***  [*\\msb-fs\universal\Informatica\_Processing\Production\Temp\_Processing\InfoImage\_Upload*](file:///\\msb-fs\universal\Informatica_Processing\Production\Temp_Processing\InfoImage_Upload) |
| How to start the automated process | *Orchestrator Time Trigger to run Queue Load :* *U:\IT\Business Intelligence\UiPath\Projects\Load\_Queue\_Encompass\_HELOC\_MaturityNotice*  *This reads the report and uploads to the Queue: REF\_Encompass\_HELOCMaturityNotice Queue\_PROD or TEST*  *That triggers the REF\_Encompass\_HELOCMaturityNotice bot to run.* |
| Reporting  (queues reporting, Excel log or another platform) | *Orchestrator logs and jobs dashboards.* |
| 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\_HELOCMaturityNotice Queue\_Test*  *REF\_Encompass\_HELOCMaturityNotice Queue\_Prod* |
| Schedule Details | *Daily, 6 A.M CST* |

## Project(s) workflows

|  |  |
| --- | --- |
| Workflow Name | Description |
| Main | *Invokes all the other workflows* |
| Get Transaction Data | *Pulls the data down from the Queue*  *Assign variables/arguments* |
| Process | *Open word HELOC template*  *Update with customer data*  *Save as PDF*  *Move to InfoImage folder*  *Delete word doc file* |
| End | *Join all PDF files and save as HELOC\_Maturity\_Notices09282023.pdf* |

## Packages

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

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