

Orchestr8 & PTO Guide

by Chad Doorley

Launching Orchestr8

1. Find folder in Documents: 'Orchestr8'
2. Navigate to 'django_app'
3. Launch 'simplified_runner'

You are all set. Server & Worker are running on localhost:8000

Endpoints

- You can access these endpoints through Google Chrome (recommended Private Browser/Incognito to avoid caching issues)

localhost:8000/admin

- This is the admin panel. Please log in with username/password
- Click on Periodic Tasks
- Use the check boxes to the left of each 'task' (report) and use the 'Action' dropdown at the top to 'Run Selected Task(s)' and press Go
 - You may click on each item to read the description which has information on whether it is has distribution (auto-email) built in or if it needs to be emailed out to particular users.
 - I outline all of this below, so you do not need to necessarily look there, but it will be there if you like to reference it in another location

localhost:8000/status_page

- This is the status page GUI where you can run status pages
- Users will send in requests to BusinessIntelligence@bcsbmail.com
 - They will need to include the household number in their request (or sometimes the name)
 - They may include additions/deletes as well

- You'll want to use the account_segments.xlsx file @
Project_Management\Data_Analytics\R360_Dimensions and
Segments\Development\output on DA-1 to cross reference and find out the
portfolio_key
 - double check to make sure there aren't consistency issues and you can ask the
requestor if they want to add/remove entities that differ in
householdnbr/portfolio_key (edge cases)

Reports to Run

Guide

- Daily = Every Day (Business Days)
 - Run on 1st of the month as well
- Weekly = Monday
- Monthly = 1st of the Month (Thursday, May 1)

Daily

Orchestr8:

- R360 Portfolio Key Run
 - Distribution: n/a
- Deposit Update
 - Distribution: n/a
- Indirect Recon Reserve
 - Distribution: n/a

Weekly

Orchestr8:

- New Loan Report: Francine
 - Distribution: Built-in
 - Francine Ferguson
- New Loan Report LR/Credit
 - Distribution: Built-in
 - Paul Kocak
 - Linda Clark

- Household Report
 - Distribution: n/a

Credit Track:

- Covenant Action Report
 - Distribution: Manual
 - Eldora Moore
 - Skip this: I gave her a heads up that I'll just double up the following week

Monthly

Orchestr8:

- Balance Tracker YTD
 - Distribution: Built-in
 - Tim Chaves
 - John Silva
 - Hasan Ali
 - Dawn Young
 - Chris Alves
 - Donna Oliveira
 - Nancy Pimentel
 - Michael Patacao
 - Jeffrey Pagliuca
 - Erin Riendeau
 - Donna Pavao
- Delinquency
 - Distribution: Built-in
 - Brandon George
- Business Deposits YTD
 - Distribution: Built-in
 - Hasan Ali
 - Becky Velazquez
- New Business Checking
 - Distribution: n/a
 - Refreshes dashboard for Retail
- New Consumer Checking
 - Distribution: n/a

- Refreshes dashboard for Retail
- Deposit Deep Dive
 - Distribution: Built-in
 - Eusebio Borges
- Trail Balance - Operations
 - Distribution: Built-in
 - Kelly Abernathy
 - Zachary Cabral
- Deposit Dash
 - Distribution: Built-in
 - Commercial Portfolio Managers (group mailbox)

Alteryx:

- **Note:** *If you have connection issues, feel free to update the connection issues and save over the workflow. I have a copy of it in 'archive'*
- WARR
 - Directory:

\\00-da1\Home\Share\Data & Analytics Initiatives\Project
Management\Credit_Loan_Review\WARR\Production\WARR_ME.yxmd

- Distribution: Manual
 - Paul Kocak
 - Brandon George
 - Notes:
 - Go into Excel file and pretty up (Autofit rows, bold header row)
 - Send out 'WARR_Final.xlsx'
- Concentration of Credit
 - Directory:

\\00-da1\Home\Share\Data & Analytics Initiatives\Project
Management\Credit_Loan_Review\Concentration Reports\Credit\Production

- Notes:
 - There are 2 workflows, run both. They will produce excel files in the same directory.
 - Autofit columns on all sheets and pretty up
 - It may throw an error with Run Command, but should still produce output just fine
 - Distribution: Manual
 - 'COC_Report_Includes_Personal.xlsx'

- Paul Kocak
 - Patrick Leddy
 - Sean Cartwright
- 'COC_Report_CMLonly
 - Hasan Ali
- **I'll run the other report when I return**