RFP Agent – README

1. Purpose of the Agent

The RFP Analysis Agent automates the evaluation of RFP documents by validating them across multiple dimensions - legal alignment, core capability fit, historical experience, and liability exposure.
It provides a consolidated score and supports a human-in-the-loop approval or rejection decision before generating a bid summary.

2. How to Use the Agent (Step-by-Step)

Step 1: Prepare the RFP Document and Internal Validation Data Document

- Ensure the RFP document is available in PDF format with name 'Sample_RFP.pdf'.
- Ensure the Internal validation data document is available in word docx format with name 'Sample_Reference_Document.docx'

Step 2: Stage Input Data

Before running the agent, ensure that both the RFP document and the internal reference document are staged in the correct locations.

RFP Document Location

The sample RFP document used for validation must be placed at:

C:\APA\RFP\RFP Documents\Sample_RFP.pdf

Instructions:

- Only one RFP document should be present per execution
- The bot runner must have read access to this folder
- The RFP_Loader tool automatically loads the document and extracts the RFP number

Internal Data Document Location

The internal company reference document required for validation is stored at:

C:\APA\RFP\Internal Document\Sample_Reference_Document.docx

Purpose:

- This document contains internal data used by the Data Input tool, including:
    - Company capabilities
    - Legal and compliance standards
    - Historical experience references
    - Liability guidelines

Instructions:

- Ensure the document is present before execution
- The bot runner must have read access to this folder
- This document can be updated without modifying the agent logic

Summary of Input Data Staging

Input Type	Location
RFP Document	C:\APA\RFP\RFP Documents\Sample_RFP.pdf
Internal Reference Data	C:\APA\RFP\Internal Document\Sample_Reference_Document.docx

Note: Both paths are configurable within the agent in their respective task bot tools and can be modified to match different environments without changing the overall workflow.

Step 3: Provide Email ID

- During execution, the user is prompted to enter an email ID.
- This email ID is used to send the final Bid Summary HTML report.

Step 4: Run the Agent

- Execute the agent from the Automation Anywhere Control Room.
- No manual intervention is required until the validation results are displayed.

Step 5: Review and Decision

- The RFP_Validation_Form displays:
    - Individual validation scores
    - Descriptions for each score
    - Overall alignment score and summary
- The user selects Approve or Decline.

Step 6: Bid Summary Generation

- If Approved, the Upload_BidSummary tool:
    - Generates an HTML summary
    - Emails it to the provided email ID
- If Declined, the agent stops gracefully without generating output.

3. Tools Used in the Agent

Tool Name	Description
RFP_Loader	Loads the RFP document and extracts the RFP number
Internal_Data_Input	Ingests internal data required for validations
Legal_Validator	Validates legal clause alignment
CoreFit_Validator	Evaluates technical and capability fit
History_Validator	Validates historical experience alignment
Liability_Validator	Assesses liability and risk exposure
RFP_Validation_Form	Human-in-the-loop approval or rejection
Email_Bid_Summary	Generates and emails HTML bid summary

4. Integrations & Dependencies

Automation Anywhere Environment

- Automation Anywhere A360 Control Room
- AI Agents enabled

- Required packages installed before execution

APIs & External Integrations

- No external APIs used
- No API keys required
- Uses Automation Anywhere native AI capabilities only

Applications

- Outlook should be installed and logged in in the runner machine.
- Microsoft Word should be installed in the runner machine.

6. Security & Credentials

- No hard-coded credentials
- No sensitive data stored
- Email configuration is managed securely via Control Room
- All sample data is non-proprietary

7. Error Handling & Graceful Termination

- Critical failures (missing RFP or internal data) cause the agent to stop gracefully with a clear message.
- Non-critical validation failures are handled gracefully and do not interrupt the agent flow.
- All errors are logged in Control Room for auditability.