



HelpDesk Copilot

Readme

Version 1.0

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1. Introduction

This document provides comprehensive guidance for effectively using the **HelpDesk Copilot** automation bot. It explains the bot's purpose, architecture, capabilities, configuration steps, and operational flow to enable users to deploy, run, and maintain the solution with confidence.

HelpDesk Copilot is designed to automate the end-to-end handling of IT service desk queries by intelligently orchestrating web automation, API integrations, human-in-the-loop approvals, and secure credential management. It transforms traditionally manual, error-prone IT support processes into a structured, governed, and scalable digital workflow.

This document covers:

- What HelpDesk Copilot does and why it matters
- How the bot executes its workflow from start to finish
- How to configure system access, credentials, and parameters
- How approvals, validations, and enterprise integrations are handled
- How to operate, monitor, and extend the solution safely

The objective of this document is to ensure that both technical and business users can understand, trust, and successfully use HelpDesk Copilot as a reliable digital worker within their IT operations.

By following this guide, users will be able to:

- Deploy the bot in an enterprise environment
- Integrate it with IT Query Hub, Salesforce, and email systems
- Enforce governance through approvals and traceability
- Achieve measurable improvements in efficiency, accuracy, and response time

In short, this document enables users to unlock the full value of HelpDesk Copilot and use it as a strategic automation asset rather than just a task-level bot.

1.1 Overview

HelpDesk Copilot is an Automation Anywhere A360 Agent that automates the complete lifecycle of IT service desk queries from the IT Query Hub system. It retrieves queries, requests human approval when needed, performs the appropriate action such as sending emails or creating Salesforce cases, updates the query status, and safely closes the system — all within a controlled and auditable workflow.

High-Level End-to-End Execution (Non-Technical Explanation)

From a business user's point of view, HelpDesk Copilot works like a digital IT support analyst:

1. It opens the IT Query Hub website.
2. It navigates to the required query status (for example, Open or In Progress).
3. It counts how many queries exist and reads them one by one.
4. For each query, it understands what needs to be done — such as notifying a user or creating a Salesforce case.
5. If the action is sensitive, it sends the details to a human approver and waits for approval.
6. Once approved, it performs the action automatically.
7. It updates the query status, so the request is properly tracked.
8. Finally, it closes the IT Query Hub and generates a summary of the execution.

This ensures the automation is fast, accurate, secure, and aligned with enterprise governance and compliance standards.

Sample Input

Input Parameter	Example Value
Query	"Process all Open IT queries. Send emails to users and create Salesforce cases for critical requests."

Sample Output

Output Field	Example Value
Total Queries Processed	12
Emails Sent	10
Salesforce Cases Created	2
Approvals Requested	12
Final Status	Completed
Execution Summary	All open queries processed successfully

1.2 Use cases

The key use cases for HelpDesk Copilot include:

- **Automated IT Service Desk Processing**
Automatically retrieve, review, and process IT support queries from the IT Query Hub without manual intervention.
- **User Notification Automation**
Send acknowledgment, update, or resolution emails to end users based on query status or type.
- **Salesforce Case Creation**
Automatically create Salesforce cases for critical, escalated, or high-priority IT issues to ensure proper tracking and SLA compliance.
- **Human-in-the-Loop Governance**
Introduce mandatory human approval before executing sensitive actions such as sending external communications or creating customer-facing tickets.

- **Query Status Management**
Update and manage query statuses (Open, In Progress, Resolved, etc.) automatically to maintain accurate tracking and reporting.
- **High-Volume Query Handling**
Process large volumes of IT queries consistently and efficiently during peak periods without increasing headcount.
- **Error Reduction and Standardization**
Eliminate human errors and ensure consistent handling of IT queries by following predefined workflows.
- **Audit and Compliance Support**
Maintain a clear execution trail with approvals, actions taken, and status updates for audit and compliance purposes.
- **24x7 Unattended Operations**
Run the bot unattended to support IT operations outside business hours.
- **Scalable Enterprise Integration**
Easily extend or integrate with additional systems such as CRM, ticketing platforms, or monitoring tools.

2. Requirements & Prerequisites

2.1 System Requirements

HelpDesk Copilot is built on Automation Anywhere Automation 360 and can be deployed using either the Enterprise (Cloud deployed) or Community Edition. The following system requirements must be met to design, run, and maintain the bot reliably.

2.1.1 Supported Platforms

Platform	Supported
Automation Anywhere Enterprise (Cloud deployed)	Yes
Automation Anywhere Community Edition	Yes

2.1.2 Device Requirements

2.1.2.1 For Bot Development (Bot Creator Machine)

Component	Minimum Requirement	Recommended
Operating System	Windows 10 (64-bit)	Windows 11 (64-bit)
RAM	8 GB	16 GB
CPU	4-core processor	8-core processor
Disk Space	10 GB free	20 GB free
Internet	Stable broadband	High-speed internet
Browser	Google Chrome (latest)	Google Chrome (latest)

2.1.2.2 For Bot Execution (Bot Runner Machine)

Component	Minimum Requirement	Recommended
Operating System	Windows 10 (64-bit)	Windows 11 (64-bit)
RAM	8 GB	16 GB

CPU	4-core processor	8-core processor
Disk Space	10 GB free	20 GB free
Internet	Required	High availability
Browser	Google Chrome (latest)	Google Chrome (latest)

2.1.3 Browser Requirements

Browser	Supported
Google Chrome	Yes (Latest version)
Microsoft Edge (Chromium)	Yes
Firefox	Not recommended

2.1.4 Network & Access Requirements

- HTTPS access to IT Query Hub website
 - API access to Salesforce (for case creation)
 - SMTP or email service access for sending emails
 - Outbound internet access enabled on bot runner
-

2.1.5 Automation Anywhere Requirements

Item	Requirement
Control Room Access	Required
Bot Creator Role	Required for development
Bot Runner Role	Required for execution
Credential Vault	Required
Human-in-the-loop	Enabled

2.1.6 Security Requirements

- TLS/HTTPS enabled for all external connections
- Credentials stored only in Credential Vault
- No hardcoded secrets in bots

2.2 Prerequisites

Before using HelpDesk Copilot, the following software, system access, and accounts must be configured and available.

2.2.1 Automation Platform

Item	Requirement
Automation Anywhere Platform	Automation 360 (Enterprise Cloud or Community Edition)
Bot Creator Access	Required for configuration
Bot Runner Access	Required for execution
Credential Vault	Enabled

2.2.2 Operating System & Browser

Item	Requirement
Operating System	Windows 10 / 11 (64-bit)
Browser	Google Chrome (latest)

2.2.3 Third-Party Systems & Accounts

System	Purpose	Requirement
IT Query Hub	Retrieve and manage queries	Access to website (IT Query Hub)
Salesforce	Create support cases	Salesforce account with API access
Email (Gmail / SMTP)	Send notifications	Active email account

2.2.4 Salesforce Prerequisites

Item	Requirement
Salesforce Edition	Professional / Enterprise / Developer
Connected App	Created and configured
OAuth Client ID	Available
OAuth Client Secret	Available
API Access	Enabled

2.2.5 Credential Vault Setup

The following credentials must be stored securely in Credential Vault:

Locker	Credential	Attributes
Gmail	Gmail_Credentials	Username, Password (App Password)
Salesforce	Salesforce_Credentials	Salesforce_Email_ID, Salesforce_Password, Salesforce_Client_ID, Salesforce_Client_Secret

2.2.6 Human Approval Configuration

Item	Requirement
Human Approver	Assigned user or group
User_Approval_Form	Configured and active
Notification Access	Enabled

2.2.7 Network & Security

- Internet access for bot runner machine
 - Firewall allows access to:
 - IT Query Hub URL
 - Salesforce API endpoints
-

- Email SMTP or API endpoints
 - HTTPS enabled
 - No credentials hardcoded

3. Getting Started

3.1 Quick Start

3.1.1 Setup

This section describes the step-by-step process to configure all external systems and access required for HelpDesk Copilot to function correctly.

The setup includes:

- Accessing the IT Query Hub demo website
- Configuring Salesforce API access
- Configuring email access
- Setting up Automation Anywhere Credential Vault

1. Step 1 - Access IT Query Hub

The IT Query Hub is a public demo website and does not require authentication.

2. Open a browser and navigate to:
<https://it-query-hub.web.app/>
3. Verify that the website loads successfully.
4. Confirm that queries and status tabs are visible.

No login or credentials are required for this system.

2. Step 2 - Configure Salesforce API Access

1. Log in to Salesforce as an administrator.
2. Go to **Setup → App Manager**.
3. Click **New Connected App**.
4. Enable OAuth settings and select the following scopes:
 - Access and manage your data (API)
 - Perform requests on your behalf (refresh_token)
5. Save the Connected App.
6. Copy and store the following values:
 - Consumer Key (Client ID)
 - Consumer Secret (Client Secret)
7. Ensure the Salesforce user has API access enabled.

3. Step 3 - Configure Email Access

1. Use a Gmail or corporate SMTP account for sending emails.
 2. If using Gmail:
 - Enable App Passwords.
 - Generate an App Password for the bot.
 3. Verify that a test email can be sent successfully.
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4. Step 4 - Create Credential Vault Lockers

1. Go to **Automation Anywhere Control Room → Credentials → Lockers**.
 2. Create the following lockers:
 - Gmail
 - Salesforce
-

5. Step 5 - Create Credentials

1. Gmail

- Credential Name: Gmail_Credentials
- Locker: Gmail
- Attributes:
 - Username
 - Password

2. Salesforce

- Credential Name: Salesforce_Credentials
 - Locker: Salesforce
 - Attributes:
 - Salesforce_Email_ID
 - Salesforce_Password
 - Salesforce_Client_ID
 - Salesforce_Client_Secret
-

6. Step 6 - Assign Permissions

1. Grant the bot runner user **Consumer** access to the Gmail and Salesforce lockers.
2. Verify the bot can read credentials at runtime.

7. Step 7 - Validate Setup

1. Run the bot in test mode.
2. Verify:
 - IT Query Hub opens correctly.
 - Salesforce authentication succeeds.
 - Emails are sent successfully.
 - Approval requests are received.

3.1.2 Configuration and Use

- **For Packages:**

Not Applicable. HelpDesk Copilot is delivered as an Automation Anywhere Agent and does not include a separate package.

- **For Bots:**

This section describes how to configure and use the HelpDesk Copilot bot.

- **For Credential Vault –**

Locker Name	Credentials Name	Attribute Name	Value
Gmail	Gmail_Credentials	Username	Email sender account
Gmail	Gmail_Credentials	Password	Email password or app password
Salesforce	Salesforce_Credentials	Salesforce_Email_ID	Salesforce login
Salesforce	Salesforce_Credentials	Salesforce_Password	Salesforce password
Salesforce	Salesforce_Credentials	Salesforce_Client_ID	OAuth Client ID
Salesforce	Salesforce_Credentials	Salesforce_Client_Secret	OAuth Client Secret

- **For configuring the bot –**

- **INPUT VARIABLES:**

Variable Name	Bot / Tool Name	Type	Mandatory	Purpose	Example Input
strQueryStatus	Query_Status_Navigator	Text	Yes	Status to navigate in IT Query Hub	Open
strQueryItemIndexNumber	Get_Query_Data	Number	Yes	Index number of query to retrieve	1
strStatus	Change_Status_Of_Query	Text	Yes	New status to set	In Progress
strTotalQueriesCount	Change_Status_Of_Query	Number	Yes	Total queries count	10
strEmailBody	Send_Mail	Text	No	Body of the email	Issue is being processed
strSubject	Send_Mail	Text	No	Subject of the email	IT Support Update
strToAddress	Send_Mail	Text	No	Recipient email	user@company.com
strCaseInsertJson	Create_Salesforce_Case	Text	No	JSON for Salesforce Case creation	{"Subject":"Issue","Status":"New"}

strContactJson	Create_Salesforce_Case	Text	No	JSON for Salesforce Contact	{"LastName":"User"}
strApproverMessage	User_Approval_Form	Text	Yes	Message for approval	Please approve

• **OUTPUT VARIABLES:**

Variable Name	Bot / Tool Name	Type	Mandatory	Purpose	Example Output
strResponse	All Bots	Text	Yes	Execution result	Success
strTotalItems	Get_It_Query_Item_Count	Number	Yes	Total queries	15
strJsonQueryData	Get_Query_Data	Text	Yes	Retrieved query JSON	{"id":1,"status":"Open"}
strFinalDecision	User_Approval_Form	Text	No	Approval result	Approved
strApprovalMessage	User_Approval_Form	Text	No	Approver comments	Proceed

• **Explain how a customer can use the bot once it's configured**

• **Example 1 – Update Query Status**

Input:

- strQueryStatus = Open
- strQueryItemIndexNumber = 1
- strStatus = In Progress

Result:

- Bot retrieves query and updates status.
-

- **Example 2 – Send Notification**

Input:

- strSubject = "Update"
- strEmailBody = "Your issue is in progress"
- strToAddress = "user@company.com"

Result:

- Email is sent to the user.
-

- **Example 3 – Create Salesforce Case**

Input:

- strCaseInsertJson = {"Subject":"Login Issue","Status":"New"}
- strContactJson = {"LastName":"John"}

Result:

- Salesforce case is created.
-

- **Example 4 – Approval Workflow**

Input:

- strApproverMessage = "Approve escalation"

Result:

- Approval form sent and decision recorded.
-

- **Execution Flow**

1. Open IT Query Hub.
 2. Navigate to query status.
 3. Retrieve total count.
 4. Retrieve individual query.
 5. Request approval.
 6. Execute action.
 7. Update query status.
 8. Close website.
-

4. Support & FAQs

4.1 Support

Free bots are not officially supported. You can get access to Community Support through the following channels:

- You can get access to community support, connecting with other Automation Anywhere customers and developers on the Community in the [Developers Forum](#).
- Automation Anywhere also provides a [Product Documentation portal](#) which can be accessed for more information about our products and guidance on [Automation 360](#).

4.2 FAQs

Q1. What does HelpDesk Copilot do?

A: HelpDesk Copilot automates the retrieval, processing, escalation, and status management of IT queries from the IT Query Hub. It can notify users via email, request human approval when needed, and create Salesforce cases for escalation.

Q2. Does this bot require login access to IT Query Hub?

A: No. The IT Query Hub is a demo website and does not require authentication.

Q3. Is human approval mandatory for all actions?

A: No. Human approval is configurable and is only triggered for sensitive actions such as escalation or case creation, based on your business rules.

Q4. Can the bot run unattended?

A: Yes. The bot is designed to run in unattended mode using Automation Anywhere Bot Runners.

Q5. What happens if Salesforce is unavailable?

A: The bot logs the error, skips the Salesforce action, and continues processing remaining queries. The failure is captured in the execution response.

Q6. Can I process multiple queries in one run?

A: Yes. The bot retrieves the total query count and processes each query sequentially.

Q7. Is email sending optional?

A: Yes. Email notifications are only sent if the Send_Mail tool is enabled and input parameters are provided.

Q8. How secure are credentials?

A: All credentials are stored securely in Automation Anywhere Credential Vault and are never hardcoded in the bot.

Q9. Can this bot be customized for another helpdesk system?

A: Yes. The bot can be extended to integrate with other ticketing or helpdesk platforms with minimal changes.

Q10. What browsers are supported?

A: Google Chrome (latest) is recommended for optimal compatibility.

Q11. How can I view execution results?

A: Execution results are available in Automation Anywhere Control Room under Activity → Bot Runs.

Q12. Who should I contact for support?

A: Please contact your Automation Centre of Excellence (CoE) or the bot owner for support and enhancements.

For questions relating to the Control Room: See the [Automation 360 FAQs](#).

Appendix A: Record of Changes

No.	Version Number	Date of Change	Author	Notes
1	1.0	2026-01-11	Sonu Vishwakarma	Initial creation of HelpDesk Copilot framework
2	1.0	2026-01-11	Sonu Vishwakarma	Implemented IT Query Hub navigation and data retrieval
3	1.0	2026-01-11	Sonu Vishwakarma	Added query status navigation and update functionality
4	1.0	2026-01-11	Sonu Vishwakarma	Integrated Send Mail notification feature
5	1.0	2026-01-11	Sonu Vishwakarma	Implemented Salesforce Case and Contact creation
6	1.0	2026-01-11	Sonu Vishwakarma	Added Human-in-the-Loop approval form
7	1.0	2026-01-11	Sonu Vishwakarma	Configured Credential Vault integration
8	1.0	2026-01-11	Sonu Vishwakarma	Added error handling and logging
9	1.0	2026-01-11	Sonu Vishwakarma	Added retry and timeout management
10	1.0	2026-01-11	Sonu Vishwakarma	Completed documentation and configuration guide
11	1.0	2026-01-11	Sonu Vishwakarma	Final review, testing, and stabilization

Appendix B: References

No.	Topic	Reference Link
2	Guidance: Building basic Automation 360 bots	Click here
3	Guidance: Building Automation 360 packages	Click here
4	Community Developers Forum	Click here
5	Automation Anywhere University	Click here