



**HEDEHI Solutions**  
Ideate. Automate. Innovate.

# Candidate Personality Insights AI Agent

## Readme



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# 1. Introduction

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This document contains all essential information for the user to make full use of this AI Agent. It includes a description of the functions and capabilities and step-by-step procedures for setup & configuration of the AI Agent.

## 1.1 Overview

The Candidate Personality Insights AI Agent is a decision-support automation that converts structured behavioral assessment outcomes into professional, human-reviewed personality insights.

The agent supports hiring teams by summarizing behavioral strengths, development areas, and interview follow-up questions. It does not score, rank, or evaluate candidate suitability, and it does not make hiring decisions.

All AI-generated insights require mandatory human review and approval before a final report is produced.



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## 2. Requirements & Prerequisites

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### 2.1 System Requirements

Enterprise (Cloud deployed) and Community Edition device requirements.

Review the machine hardware specifications, operating system versions, and browser types supported by Automation Anywhere Enterprise for creating and running AI Agents and packages as an Enterprise (Cloud deployed) or Community Edition user on your local machine.

### 2.2 Prerequisites

Before using this AI Agent, ensure the following are available:

- Automation Anywhere platform access with AI Agents enabled
- Automation Anywhere AI Skill enabled
- Automation Anywhere Forms enabled
- Microsoft Excel installed
- Microsoft Word installed with PDF export capability
- File system access to read input files and save output reports

No external databases or third-party APIs are required.

### 2.3 Folder Structure Requirements

The AI Agent requires a fixed folder structure on the C drive of the user's machine. This structure must be created before running the automation.

#### **Required folders:**

- C:\Candidate Personality Insights AI Agent\ExcelFiles  
(Used to store all candidate assessment Excel files)
- C:\Candidate Personality Insights AI Agent\PDFReports  
(Used to store all generated PDF personality insights reports)

**Important constraints:**

- The AI Agent reads input files only from the ExcelFiles folder.
- The AI Agent writes output PDF reports only to the PDFReports folder.
- Folder paths must not be changed or renamed.
- The automation will fail if these folders do not exist.



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## 3. Input Data Preparation (Data Staging)

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### 3.1 Assessment File Structure

- Input must be a structured candidate behavioral assessment Excel file (.xlsm)
- One file per candidate
- Files must be placed in:  
C:\Candidate Personality Insights AI Agent\ExcelFiles
- File naming convention:  
CXXXXXXXX - Structured Candidate Behavioral Assessment.xlsm  
(where CXXXXXXXX is the Candidate Number)

### 3.2 Excel Content Requirements

- Candidate responses must be completed using the provided dropdowns
- Scoring logic and formulas must remain locked and unmodified
- The Outcomes sheet must contain:
  - Trait Name
  - Trait Band (Strong, Solid, Developing, Risk Area)
  - Numeric scores and raw responses must remain hidden

The assessment template is included with the solution.



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## 4. How the AI Agent Works

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1. The AI Agent scans the ExcelFiles folder for candidate assessment files.
2. The agent extracts the Candidate Number from the file name.
3. It reads only the Trait Names and Trait Bands from the Outcomes sheet.
4. An AI Skill generates structured personality insights.
5. Insights are displayed in an Automation Anywhere Form for human review.
6. The reviewer edits (if required) and approves the insights.
7. A professional PDF personality insights report is generated and saved to:  
C:\Candidate Personality Insights AI Agent\PDFReports

The process is completed only after human approval.



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## 5. Human-in-the-Loop Review

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- AI-generated insights are editable by the reviewer
- Human approval is mandatory before report generation
- The AI Agent cannot finalize outputs without reviewer submission
- Reviewer-approved content is treated as the final authoritative version

This ensures responsible and compliant AI usage.



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## 6. Output

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For each candidate, the AI Agent produces:

- A professional PDF personality insights report
- File naming convention:  
CXXXXXXX - Candidate Personality Insights.pdf

All PDF reports are stored in:

C:\Candidate Personality Insights AI Agent\PDFReports

The report includes:

- Candidate Number
- Insights Summary
- Key Strengths
- Development Areas
- Suggested Interview Follow-up Questions
- Disclaimer





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## 7. Integrations and Dependencies

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Integrated applications used by the AI Agent:

- Automation Anywhere (AI Agent orchestration, AI Skill, Forms)
- Microsoft Excel (input data source)
- Microsoft Word (report template and PDF generation)

API Keys:

- No external API keys are required
- AI Skill credentials are managed within Automation Anywhere



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## 8. Important Guidelines and Limitations

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- The AI Agent does not score, rank, or evaluate candidates
- The AI Agent does not access raw responses or numeric scores
- The AI Agent does not make hiring decisions
- Outputs are decision-support only
- Final decisions must be made by human reviewers using multiple methods



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## 9. Troubleshooting Tips

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- Ensure the required folder structure exists on the C drive
- Confirm Excel files are placed only in the ExcelFiles folder
- Verify the Outcomes sheet is populated before running the agent
- Ensure Automation Anywhere AI Skill and Forms are enabled
- Ensure Microsoft Word is installed for PDF generation



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## 10. Disclaimer

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This AI Agent provides behavioral insights to support hiring discussions. Final hiring decisions must always be made by human reviewers using multiple evaluation methods.



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## 11. Support

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### 11.1 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](#).
- You can also contact us at [info@hedehi.com](mailto:info@hedehi.com) for further assistance.

### 11.2 FAQs

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

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## Appendix A: Record of Changes

No.	Version Number	Date of Change	Author	Notes
<b>1</b>	<i>1.0</i>	<i>12/01/2026</i>	<i>HEDEHI Solutions</i>	<i>First final copy of this document.</i>