

## HR Onboarding Kit

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### Abstract

Users can automate tasks and processes within their Office 365 workflow with Microsoft Flow, now called Power Automate. There are many of organisations that rely on the many programmes that are part of Microsoft Office 365. Common Microsoft Office applications include Word, Excel, PowerPoint, Outlook, OneNote, and OneDrive. Other Microsoft products serve their purpose, but apps typically don't talk to each other and operate independently. With Power Automate/Microsoft Flow, these apps can communicate with one another and respond to events triggered by other programmes. With Microsoft Power Automate, you can automate a wide variety of processes and tasks by integrating various apps and platforms. Whether in the cloud or on-premises, users are able to integrate Microsoft Office 365 apps with one another and a vast library of other programmes. Anyone with even a rudimentary grasp of Office 365 may build simple automations to streamline mundane tasks for their company. Power BI and Microsoft Power Apps allow advanced users to build their own unique business processes. Users may easily design the interactivity of apps using workflows, which are also called flows.

**Keywords:** Onboarding Kit, Microsoft Power Automate, Microsoft Flow.

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## **Introduction**

The HR onboarding process plays a crucial role in welcoming and integrating new employees into an organization. However, manual creation and distribution of onboarding kits can be time consuming, error-prone, and inefficient.

To address these challenges, the automation of the HR onboarding kit process using Power Automate offers a powerful solution. Power Automate is a cloud-based service that allows organizations to automate workflows and streamline various business processes. The works are automated through creating a workflow which starts from getting responses from users to updating the stocks [1]. Automation is done to decrease labour work. When an organisation hires new workers, the organisation gives the newly hired person a kit called onboarding kit. Which consists of notebooks, bags, bottle, headsets etc with the organisation's logo on it.

This automation is to update the stock status of the products present in the kit to the HR. There will be two cases happening in the onboarding process: When a product's stock goes to 1, mail is sent to the HR stating the product is going out of stock [2]. When an employee submits the form, the quantity decreases to present quantity-1. Each time when a response is submitted, notification is sent to HR through mail.

The automation process also includes a review and approval mechanism, where designated stakeholders, such as HR managers or department heads, can provide feedback, review the onboarding kit, and ensure its completeness [3]. Email is sent to the HR as a notification when the stock is nearing to 1 stating that the product is out of stock else the updated stock quantity is sent.

In existing system, the onboarding process are done manually by the recruitment team. The onboarding process is carried out in the form of handwritten forms and letters. It is a difficult job to maintain the records of the stock each time a person is recruited [4]. The existing system is not user friendly because the updation of stock manually is time consuming and the stocks are not maintained efficiently. These systems need to be handled for maintaining and updating the stock. calculations are needed to generate the stock report which is done manually so there is some greater chance of errors. The faculty has to work a lot through the calculation and if there is a loss of some report then it may cause lots of issues. In the existing system when a new employee is recruited all the onboarding process are done manually which is a time taking process and repeated process [5]. Each time when a new employee enters into the organisation these processes is repeated. That is the same work is done each time a new worker joins the organisation.

## **Objectives and Key Features**

The main objectives of the project were as follows:

- Develop an automated process for creating HR onboarding kits.
- Automate the distribution of onboarding kits to new employees.
- Reduce manual effort and eliminate errors associated with manual creation and distribution of onboarding kits.
- Improve the overall efficiency and effectiveness of the onboarding process.

## **Key Features**

### **1. Triggering the Onboarding Process**

- Using a trigger such as a new employee record in an HR system, a form submission, or an email notification to initiate the onboarding process.
- Set up the trigger in Power Automate to capture the necessary employee information required for the onboarding kit.

### **2. Generate Personalized Onboarding Kits**

- Use the employee information captured in the trigger to generate personalized onboarding kits.
- Design templates for documents, welcome letters, policies, forms, and other onboarding materials.
- Utilize Power Automate's data operations and document generation capabilities to populate the templates with the employee's details.
- Generate PDFs or other document formats for each onboarding kit.

### **3. Notify Stakeholders**

- Send automated notifications to stakeholders involved in the onboarding process, such as HR personnel, managers, IT support, or facility teams.
- Notify stakeholders about the new hire, their start date, and any specific actions they need to take.

#### **4. Delivery of Onboarding Kits**

- Deliver the personalized onboarding kits to new employees through various channels, such as email, file-sharing platforms, or HR portals.
- Attach the generated PDFs or documents to the delivery method.
- Include instructions and guidance for the employees on accessing and reviewing the onboarding materials.

#### **5. Task and Reminder Automation**

- Create tasks or reminders for HR personnel or managers to complete specific onboarding related activities.
- Assign deadlines for tasks, track their progress, and send reminders for pending actions.
- Integrate with calendars or task management tools to ensure seamless task management.

#### **6. Feedback and Evaluation**

- Collect feedback.
- k from new employees regarding the onboarding process.
- Automate surveys or feedback forms to gather input and identify areas for improvement.

### **Literature Review**

Dash et.al [6] The key components of HRM that this study highlights are as follows: hardware essentials for skill development, reskilling and retraining for bridging the skill gap; IoT competency essentials; transformative learning solutions; and risk and vulnerability issues can be used to overcome HRM issues by harnessing IoT and related technologies. This study will be beneficial to organizations hoping to take the lead in ID 4.0 by embarking on a digital journey. Organizations, institutions, and HR managers can all benefit from the study's conclusions. By deploying IoT sensors, actuators, and devices, the study suggests automating HRM system and processes with an IoT-based reusable framework. This would eventually result in comprehensive skill development through customization and seamless integration of the current HRM system. By offering important insights into the use of these technologies for skill development, the study adds to the body of knowledge on ID 4.0 and the Internet of Things.

Berglund et.al [7] The best way to move toward utilizing this technology through methodical integration is still unclear. Because of the chaos brought on by the worldwide pandemic health crisis, it is now imperative to minimize adoption thresholds and establish a more methodical escalation approach when implementing AR. The features of these learning strategies are explored in this paper along with the incorporation of augmented reality with personalized learning. To our knowledge, little research has been done on the integration process of augmented reality (AR), so we looked into two solution providers to learn more about it. According to this research, a well-coordinated progression of user-centered learning tasks—that is, an onboarding procedure—harmonizes expected cognitive levels for a given augmented reality application tool.

Chan and Foster [8] Corporate real estate (CRE) teams will face the challenge of contributing to the definition of the new "workplace" as we come out of the COVID-19 pandemic, both now and in the future. The workplace is changing, and evolving the CRE operating model will be essential to facilitating this change. It will also increase the demand for improved business unit engagement support models and partnerships. The creation of engaging workplaces that allow workers to adapt and flourish in a variety of settings will depend on the effective integration of CRE, human resources (HR), technology, and risk in order to build the enhanced employee experience. This essay will demonstrate how RBC's CRE team is using the pandemic's disruption as a chance to modernize the workplace through collaboration, increased flexibility, technology, and inventiveness, as well as through employee experience vehicles.

Peneza et.al [9] The scheduling of elective surgical procedures was restricted or stopped by hospital administrators during the initial response to the coronavirus disease 2019 (COVID-19) pandemic. Staff members who were reassigned to different hospital areas needed information and educational activities, so perioperative nurse educators acted quickly to develop creative strategies and use a variety of modalities to deliver them. In order to meet the needs of orienting nurses and enable them to advance in an OR nurse residency program, residency program educators employed alternative teaching strategies. In order to accommodate the needs of nursing students who were unable to complete their clinical rotations in healthcare settings due to social distancing regulations and limited access to operating rooms, academic educators came up with adaptable solutions. Perioperative educators can support leaders and staff in managing patient care during the pandemic by using guidelines from national and international organizations. Particular details regarding the roles and reactions of perioperative nurse educators during the pandemic are provided in this article.

Isuku et.al [10] The methodology employed for the selection of the respondents involved the simple random sampling technique. The sample size consisted of 367 out of 4000 non-academic staff members at the University of Ibadan. A reliability index of 0.72 was achieved for the "Human Resource Management Practices (HRMP)" questionnaire, which was the instrument used to collect the data. For data analysis, descriptive statistics and Pearson Product Moment Correlation were utilized, with a significance level of 0.05 for alpha. Recruitment and selection (1.26), training and development (0.22), compensation and benefits (0.15\*), occupational health and safety (0.23), and non-academic staff commitment all showed positive correlations with each other, according to the study's findings. According to the study, procedures should be followed when it comes to recruitment and selection. In addition to providing fair and timely compensation and benefits, the organization should make sure that the working environment for its non-teaching staff members is safe. Additional training programs should also be planned for this group of workers

## **Proposed Methodology**

In proposed system the repeated work is automated where manual work is reduced and the work is completed faster. The proposed system automates the existing system. Every time when a response is submitted, the submitted response is collected and fetched into power automate. Then the product's quantity is updated according to the submitted response. Here the manual work of checking and updating stock is automated. Then the notification is sent to the HR according to the condition.

The proposed system aims to automate the HR onboarding kit process using Power Automate. It streamlines and simplifies the onboarding process by automatically generating and delivering onboarding kits to new employees. The system will leverage Power Automate's capabilities to automate repetitive tasks, reduce manual efforts, and ensure a consistent onboarding experience.

### **1. Modules in the System**

- Getting response through MS FORMS.
- Creating flows using power automate.
- Notification is sent as an e-mail.

#### **Getting Response through MS FORMS**

In this module, first the responses are collected from the user through MS forms. Where the user's answers for the questions present in the form. The responses differ from one user to another as they submit the form on their own will. When the user clicks submit button, their response gets stored in the form itself.

#### **Creating Flows Using Power Automate**

In this module automated flows are created using a tool named power automate. This tool helps us in creating your own flows. Power automate is a cloud-based software that allows employees to create and automate workflows and tasks across multiple applications and services without help from developers. Automated workflows are called flows. It's a no-code development platform that helps you create and manage automated workflows. Power Automate is used to automate business processes, manage data, and create reminders.

#### **Notification is Sent as an E-mail**

In this module a notification is sent to the HR as an e-mail stating the current stock status or the updated status of the stock. Else a mail is sent stating that the stock is out of stock and reminds to get it stocked on time.

- **Current Onboarding Process**

An analysis of the current onboarding process is conducted, including the steps involved, stakeholders, and manual tasks. This assessment helps identify areas that can be automated using Power Automate.

- **Pain Points and Challenges**

The study investigates the pain points and challenges associated with the manual onboarding process. These may include time-consuming tasks, errors or inconsistencies, lack of visibility, compliance issues, and delays in the onboarding timeline.

- **User Requirements**

Interviews and discussions are held with key stakeholders, including HR personnel, managers, and new employees, to gather their requirements for the automated onboarding kit system. These requirements cover the desired features, functionality, user interface, and integration with existing HR systems.

- **Proposed Solution**

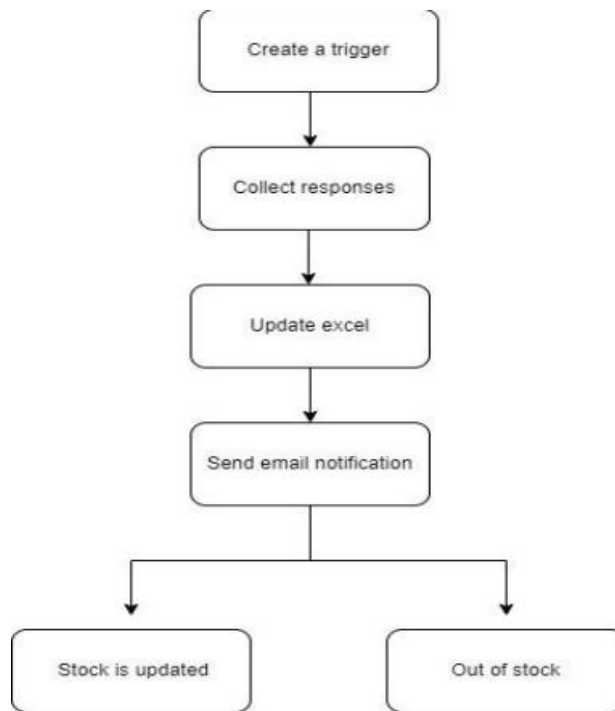
Based on the analysis of the current process and user requirements, a proposed solution is presented. This solution outlines the automation of onboarding kit creation, assembly, review, approval, and distribution using Power Automate. It includes a detailed workflow, data flow diagrams, and integration points with relevant HR systems.

- **System Architecture**

The system architecture is designed, specifying the components required for the automated onboarding kit system. This includes the integration with HRIS or other systems, document management systems, and email platforms for distribution. Security and data privacy measures are also considered in the architecture design.

- **Data Flow**

The study documents the flow of data throughout the automated onboarding kit system. It identifies the sources and destinations of data, the transformation processes, and any data validation or cleansing steps involved.



**Fig. 1: Architecture of Proposed Methodology**

## **2. Advantages**

- **Increased Efficiency**

Automation eliminates manual tasks involved in creating, assembling, and distributing onboarding kits, resulting in significant time savings and increased productivity for HR personnel. Automated workflows ensure a streamlined and efficient onboarding process.

- **Improved Accuracy and Consistency**

Power Automate ensures consistent and accurate generation of onboarding documents and kits. By leveraging standardized templates and merging data from HR systems, the risk of human errors and inconsistencies in onboarding kits is minimized.

- **Enhanced Compliance**

Automation ensures that all mandatory documents, policies, and legal requirements are included in the onboarding kit, reducing the risk of non-compliance. Power Automate allows for easy updates and ensures that the latest versions of documents are included in the kit.

### 3. Disadvantages

- **Risk of Technical Issues**

Like any automated system, there is a possibility of technical issues or bugs in the Power Automate workflows. Organizations should have contingency plans and dedicated support channels to address any disruptions and ensure the continuity of the onboarding process.

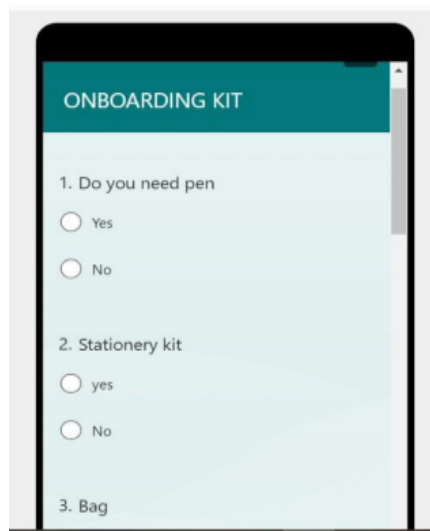
- **Limited Customization**

While Power Automate offers a range of capabilities, there may be specific customization requirements that are not easily achievable within the tool. Organizations need to assess whether the available features of Power Automate align with their unique onboarding process and requirements.

## Research and Discussion

### 1. Input Design

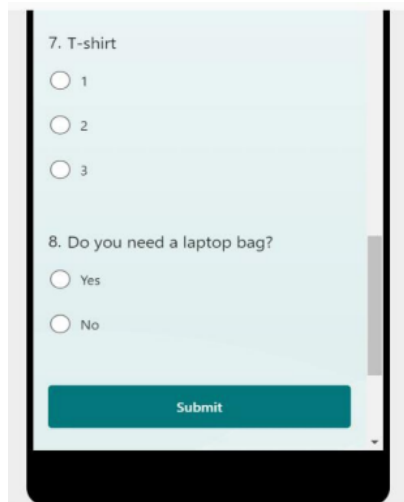
- **Creating an MS form**



The image shows a mobile application interface for an 'ONBOARDING KIT' form. The title 'ONBOARDING KIT' is displayed in a teal header. Below the header, there are three questions, each with two radio button options: '1. Do you need pen' (Yes/No), '2. Stationery kit' (yes/No), and '3. Bag'.

**Fig. 2: MS Form Created to Get Response from the User**

Fig 2, illustrates an MS Form that is created by the organisation for the user to fill. Once the user completes filling this form, all the answers gets stored in the same form itself when the user clicks submit button.

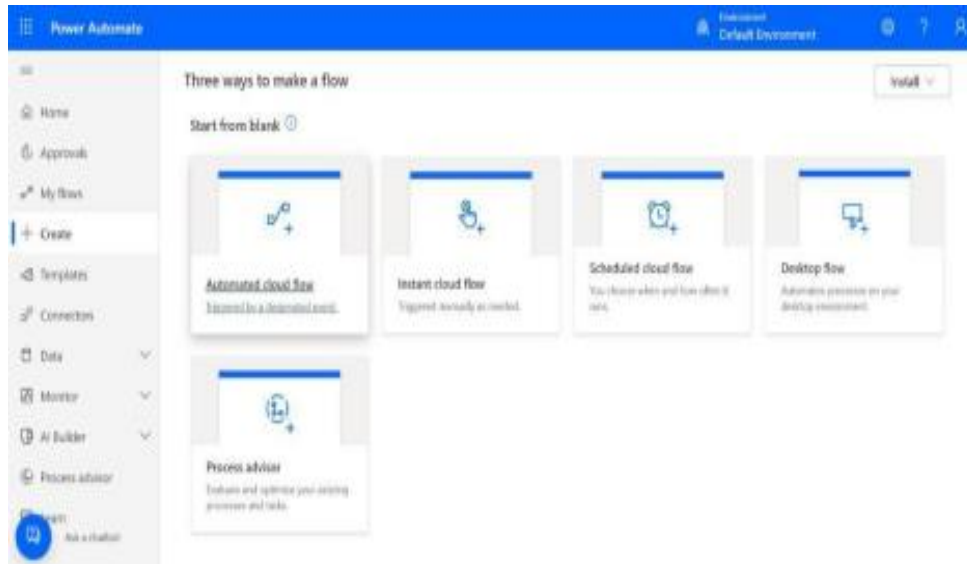


The image shows a mobile application interface for the 'Submitting Page in MS Form'. It displays two questions: '7. T-shirt' with radio button options for '1', '2', and '3', and '8. Do you need a laptop bag?' with radio button options for 'Yes' and 'No'. A teal 'Submit' button is located at the bottom of the form.

**Fig. 3: Submitting Page in MS Form**

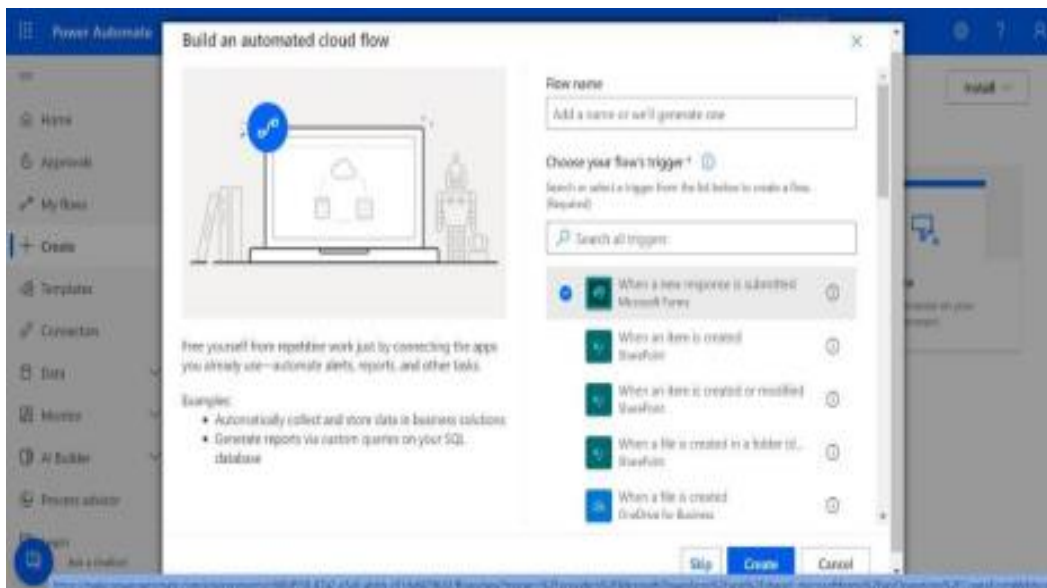
Once the user clicks submit the responses given in the forms is stored in the form itself. To get these stored information's into power automate we use a trigger to get the responses that a user stored it by clicking submit button in the form shown in Fig 3.

- **Creating Flows Using Power Automate**



**Fig. 4: Power Automate Flow Creation**

Fig 4 illustrates how an automated flow in Power Automate are created. Developer can create flows in 4 different ways in Power Automate they are automated cloud flow, instant cloud flow, scheduled cloud flow and desktop flow.

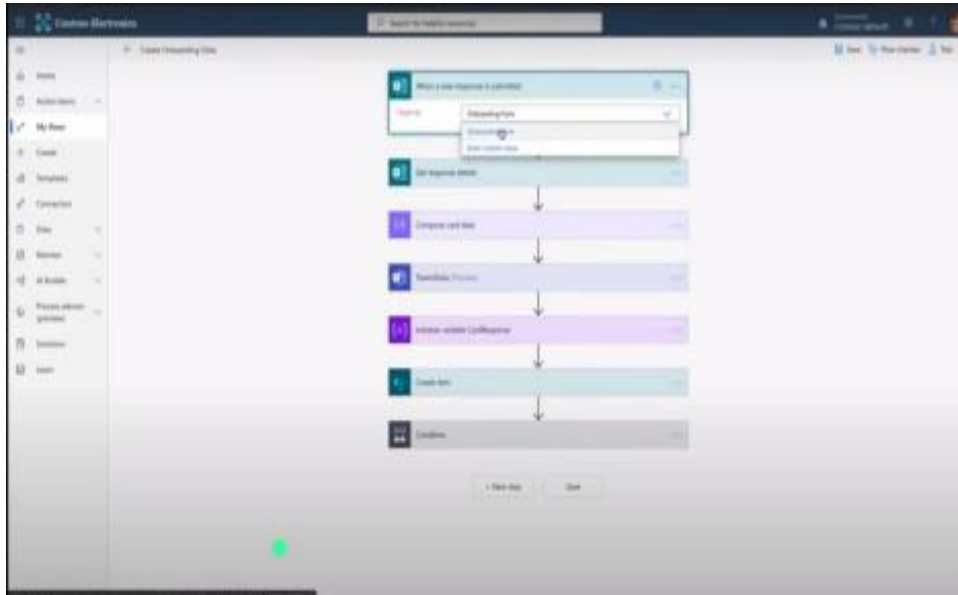


**Fig. 5: Trigger Creation**

Fig 5 represents a trigger is created to collect the information's that are submitted by the users who uses the form that was created by the organisation. A trigger named 'When a new response is submitted' is used to collect the submitted responses in MS form. Power Automate provides a wide range of pre-built triggers for various applications and services, making it easy to connect and integrate with different systems.

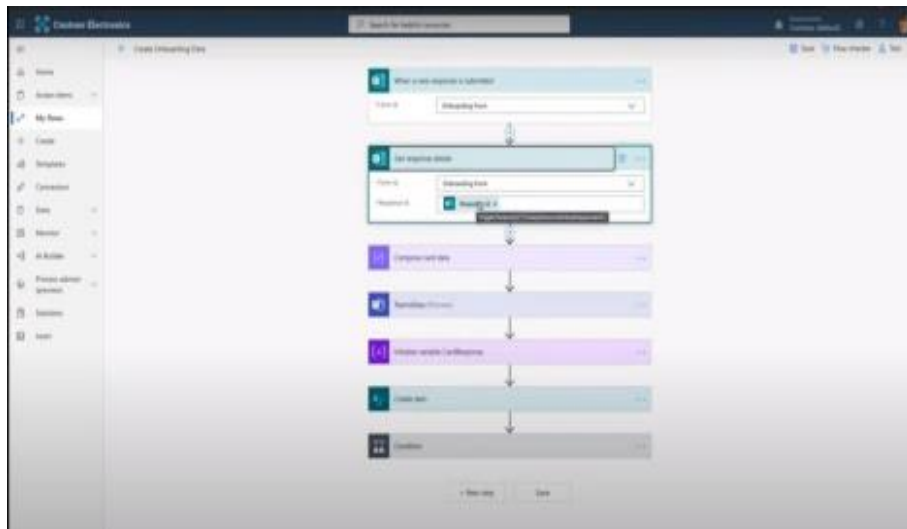
Triggers are created in Power Automate while creating a flow to specify the event or condition that will initiate the execution of the flow. They serve as the starting point for your workflow and determine when the flow will be triggered to run.

By selecting the appropriate trigger, you define the event or condition that will activate your flow. When you create a flow in Power Automate, you typically want it to respond to a specific event or condition in an application or service. Once the trigger event occurs, Power Automate initiates the flow and executes the subsequent actions or steps defined within the flow.



**Fig. 6: Fetching Forms**

Fig 6 depicts the first process in collecting responses from the user through Microsoft form. To fetch a Microsoft Form into Power, automate flow, you can use the "Get response details" action. This action allows you to retrieve the responses submitted to a specific Microsoft Form. After selecting the trigger, search for and add the "Get response details" action to your flow.



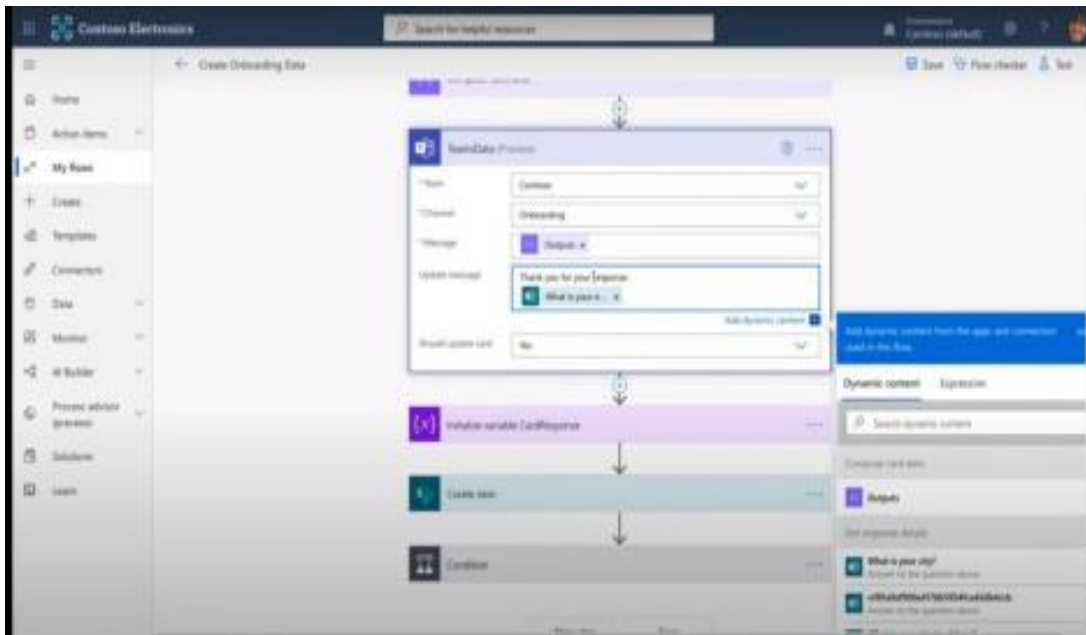
**Fig. 7: Get Response Details**

Fig 7, represents the "Form ID" field, we specify the ID of the Microsoft Form which we want to fetch. we can either provide the Form ID directly or use dynamic content to select it dynamically. In the "Response ID" field, provide the ID of the response want to fetch. It can obtain this ID from the trigger output or use dynamic content to select it dynamically.

Once configured the action with the appropriate Form ID and Response ID, we can add subsequent actions in your flow to process or utilize the fetched form data.



By using the "Get response details" action, we can easily fetch the details of a specific response submitted to a Microsoft Form within your Power Automate flow.

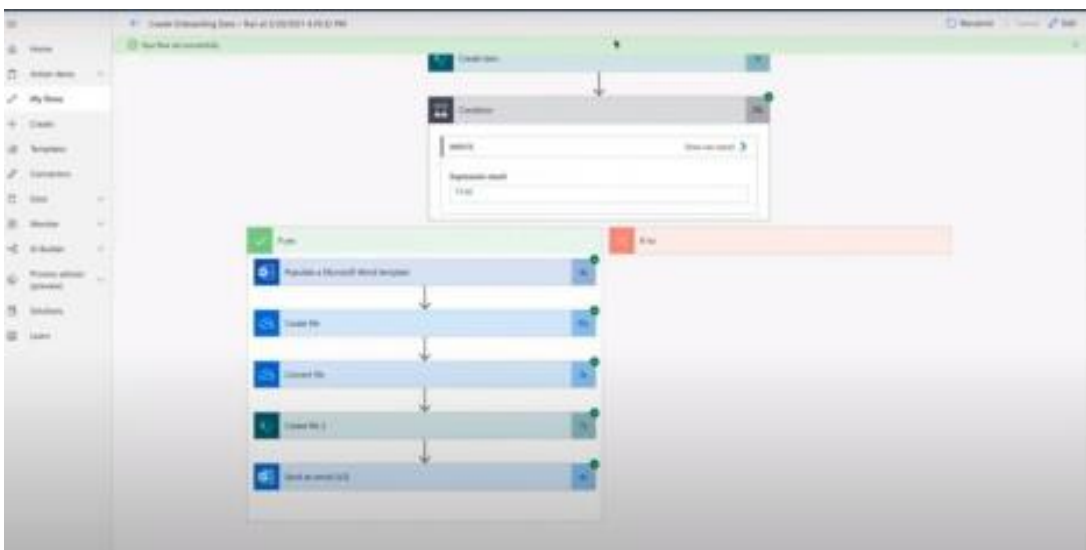


**Fig. 8: Excel Updating**

To import data from an Excel file into Power Automate, we can use the "Excel - Get rows" action. This action allows user to retrieve the rows from an Excel table or range and use the data in your flow shown in Fig 8.

When the user adds the "Excel - Get rows" action to flow we should provide the following information to configure the action:

- Select the Excel file that we want to import by specifying the file path or using dynamic content to select the file dynamically.
- Choose the worksheet from which we want to import the data.
- Specify the table or range that contains the data that we want to retrieve.
- If required, we can apply filters or sorting options to fetch specific rows or define the number of rows to retrieve.



**Fig. 9: Conditional Statement**

Fig 9, illustrates the conditional flow where there are two statements executed. In Power Automate, we can use the "Condition" action to create an if-else condition in our flow. The condition that we give here is "Quantity equal to 1". If the quantity of a product is equal to 1, notification is sent to the HR stating to restock particular product else a notification is sent stating the present stock statement.

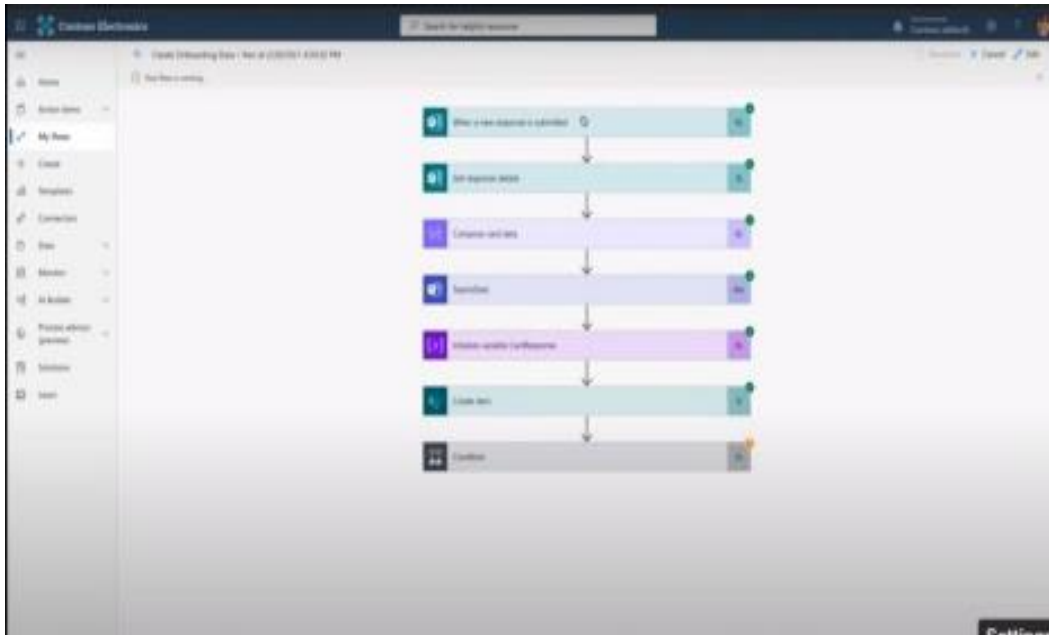


Fig. 10. Flow Tester

Fig 10, illustrates the flow testing window. In Power Automate, a flow test refers to the process of testing a workflow or automation created using Power Automate. It allows you to validate the functionality and behaviour of your flow before deploying it in a production environment. During a flow test, you simulate the execution of the flow and provide sample inputs to verify its outputs, identify any errors or issues, and make necessary adjustments.

## 2. Storage Design

- The Stocks are Present in an Excel Sheet

The screenshot shows an Excel spreadsheet with the following data:

S.No	Products	Quantity
1	1 Bag	10
2	2 Pen	10
3	3 Stationery kit	10
4	4 Bottle	10
5	5 Coffee mug	10
6	6 Notebook	10
7	7 T-shirt	10
8	8 Laptopbag	10

Fig. 11: Excel Sheet

Fig 11, illustrates the stock statement which is present in the form of an excel sheet where the quantity gets updated each time when a response is submitted then fetched into Power Automate through flow. Here the quantity column gets updated that it decreases by 1 each time when a product is selected.

### 3. Output Design

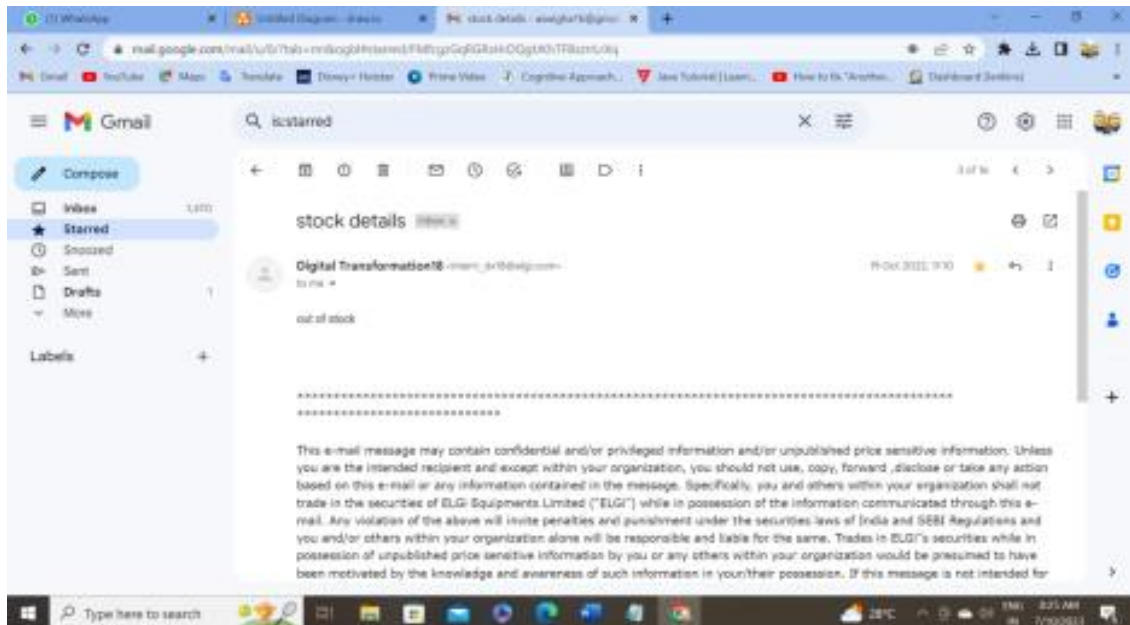


Fig. 12: Reminder “Out of Stock”

Fig 12 depicts the output that we got when the flow is tested. The output here is a notification sent to HR through email given in the flow, stating that the product is out of stock.

### Conclusion

In conclusion, automating the HR onboarding kit using Power Automate offers several benefits and streamlines the onboarding process for new employees. By leveraging the capabilities of Power Automate, HR teams can create a seamless and efficient onboarding experience. Here are some key points to consider:

- **Time-saving:** Automating the onboarding kit eliminates the need for manual and repetitive tasks. Power Automate can handle tasks such as sending welcome emails, generating personalized documents, and assigning necessary permissions or accesses. This saves HR personnel significant time and allows them to focus on other critical aspects of the onboarding process.
- **Consistency and Accuracy:** Automation ensures that each new employee receives the same standardized onboarding experience. Power Automate can create and distribute consistent onboarding documents, checklists, and forms, reducing the chance of errors or omissions. This consistency helps maintain compliance with company policies and legal requirements.
- **Scalability and Flexibility:** Power Automate allows HR teams to easily scale the onboarding process as the organization grows. Whether onboarding one employee or dozens, the automated workflows can adapt to the changing needs of the organization. Additionally, Power Automate integrates with various systems and applications, enabling seamless data exchange and enhancing the flexibility of the onboarding process.

Overall, automating the HR onboarding kit using Power Automate offers significant advantages for HR teams and new employees alike. It streamlines the onboarding process, improves efficiency, ensures consistency and accuracy, enhances the employee experience, enables scalability, and provides valuable insights for continuous improvement. By leveraging the power of automation, organizations can set a strong foundation for their new employees and maximize their success from the start.

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