



Employee Onboarding Agent

Readme

Version 1.0

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1. Introduction

This document provides comprehensive guidance for effectively using the AI-Powered Employee Onboarding Automation solution. It explains the solution's purpose, architecture, capabilities, configuration steps, and operational workflow to enable users to deploy, run, and maintain the system with confidence.

The Employee Onboarding Automation solution is designed to automate the end-to-end onboarding process by intelligently orchestrating email automation, AI-based document understanding, API integrations, human-in-the-loop verification, and automated communications. It transforms traditionally manual, time-consuming, and error-prone HR onboarding activities into a structured, governed, and scalable digital workflow.

This document covers:

- What the Employee Onboarding Automation solution does and why it matters
- How the system processes onboarding requests from email ingestion to completion
- How AI is used to classify emails and extract employee data from attachments
- How validation, exception handling, and human verification are managed
- How automated notifications and confirmation emails are generated
- How to configure integrations, access, and operational parameters
- How to operate, monitor, and safely extend the solution

The objective of this document is to ensure that both technical and business users can understand, trust, and successfully use the Employee Onboarding Automation solution as a reliable digital worker within HR operations.

By following this guide, users will be able to:

- Deploy the solution in an enterprise HR environment
- Integrate it with email systems and internal HR platforms
- Leverage AI Agents and API tasks for intelligent workflow orchestration
- Enforce accuracy through validations and human-in-the-loop approvals
- Improve onboarding efficiency, consistency, and compliance

In short, this document enables users to unlock the full value of the AI-Powered Employee Onboarding Automation solution and use it as a strategic HR automation asset rather than a manual, task-driven process.

1.1 Overview

Employee Onboarding Agent is an AI-driven automation solution built on Automation Anywhere A360 that manages the complete lifecycle of employee onboarding requests. It retrieves onboarding emails and attachments, uses AI to understand whether the request is valid, extracts employee details from documents, requests human verification when required, sends onboarding communications, and completes the process within a controlled and auditable workflow.

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

From a business user's point of view, Employee Onboarding Agent works like a digital HR onboarding assistant:

1. It connects to the HR email inbox and downloads the latest emails.
2. It identifies which emails are related to employee onboarding.

3. It opens and reads the attachments associated with onboarding requests.
4. It intelligently extracts employee information from the documents.
5. It validates the extracted data for accuracy and completeness.
6. If any information is missing or incorrect, it sends the case for human verification.
7. After approval or correction, it resumes the onboarding process.
8. It sends confirmation emails for successful onboarding to employees and HR.
9. It updates the onboarding status for tracking and reporting.
10. Finally, it completes the process and generates an execution summary.

This ensures the onboarding process is fast, accurate, compliant, and consistently executed while reducing manual HR effort and improving the overall employee experience.

Sample Input

Input Parameter	Example Value
Folder Path	Download all the current date email which as attachment at specific folder path.

Sample Output

Send Mail to the Candidate as per the result of the onboarding process.

1.1 Use cases

The key use cases for Employee Onboarding Agent include:

- **Automated Employee Onboarding Processing**

Automatically retrieve, analyze, and process employee onboarding requests from HR email systems without manual intervention.

- **Email Classification and Intent Detection**

Intelligently identify whether incoming emails are related to onboarding and route only relevant requests for further processing.

- **Document Extraction and Data Capture**

Automatically download onboarding attachments and extract employee information using AI-powered document understanding.

- **Human-in-the-Loop Verification**

Trigger mandatory human review and approval when extracted data is incomplete, incorrect, or requires validation.

- **Automated Employee and HR Notifications**

Send onboarding confirmation, status updates, or correction request emails to employees and HR teams.

- **Onboarding Status Management**

Update onboarding progress and completion status to ensure accurate tracking and reporting.

- **High-Volume Onboarding Handling**

Process large volumes of onboarding requests efficiently during hiring peaks without additional HR resources.

- **Error Reduction and Standardization**

Minimize manual errors and ensure consistent onboarding execution using predefined AI-driven workflows.

- **Audit and Compliance Support**

Maintain a complete execution and approval trail for compliance, audit, and traceability requirements.

- **24x7 Unattended HR Operations**

Run the automation unattended to support onboarding activities beyond business hours.

2. Requirements & Prerequisites

2.1 System Requirements

Employee Onboarding Agent is built on Automation Anywhere Automation 360 and can be deployed using either the Enterprise (Cloud deployed) or Community Edition. The solution leverages AI skills, API tasks, and AI Agents to automate the end-to-end employee onboarding process. The following system requirements must be met to design, run, and maintain the automation 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

- SMTP or email service access for sending emails
 - IMAP to get the email and attachment.
 - 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 Employee Onboarding Agent, 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
Email (Gmail / SMTP)	Send notifications	Active email account

2.2.4 Credential Vault Setup

The following credentials must be stored securely in Credential Vault:

Locker	Credential	Attributes
Gmail	Gmail_Credentials	Client_ID, Client_Secret

2.2.5 Human Approval Configuration

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

2.2.6 Network & Security

- Internet access for bot runner machine
- Firewall allows access to:
 - Email SMTP or API endpoints
 - Email IMAP
- 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 Employee Onboarding Agent to function correctly.

The setup includes:

- Configuring email access
 - Setting up Automation Anywhere Credential Vault
-

3. Step 1 - Configure Email Access

1. Use a Gmail or corporate SMTP account for sending emails.
 2. If using Gmail:
 - Enable a web Credential.
 - Generate an Client ID and Client Secret.
 3. Verify that a test email can be sent successfully.
-

4. Step 2 - Create Credential Vault Lockers

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

1. Step 3 - Create Credentials

1. Gmail

- Credential Name: Gmail_Credentials
 - Locker: Gmail
 - Attributes:
 - Client ID
 - Client Secret
-

2. Step 4 - Assign Permissions

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

3. Step 7 - Validate Setup

1. Run the bot in test mode.
2. Verify:
 - Emails are sent successfully.
 - Approval requests are received.

3.1.2 Configuration and Use

- **For Packages:**

Not Applicable. Employee Onboarding Agent 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 Employee Onboarding Agent bot.

- **For Credential Vault –**

Locker Name	Credentials Name	Attribute Name	Value
Gmail	Gmail_Credentials	Client_ID	Email Client ID
Gmail	Gmail_Credentials	Client Secret	Client Secret

- **For configuring the bot –**

- **INPUT VARIABLES:**

Variable Name	Bot / Tool Name	Type	Mandatory	Purpose	Example Input
ExtractedData	FormatDataAPI	Text	Yes	Extracted data,	Pdf extracted data.

				used to format it	
MessageInput	EmailComposerAPI	text	Yes	To use for composing a mail	Mail Message
EmailContent	DetailsVerificationAgent	Text	Yes	Content of the Email	Mail id, Mail message.
FolderPath	DetailsVerificationAgent	Text	Yes	Folder path where current email attachment is stored	C:\Program Files
iStrAttachment FolderPath	MainEmployeeOnboardingAi Agent	Text	Yes	Folder path to download Attachment	C:\Program Files (x86)\Notepad++

• **OUTPUT VARIABLES:**

Variable Name	Bot / Tool Name	Type	Mandatory	Purpose	Example Output
FormattedResponse	FormatDataAPI	Text	Yes	Formatted Data	Name DOB
FormattedData	DetailsVerificationAgent	Text	Yes	Contains formatted data of document	Name DOB
Verification Status	DetailsVerificationAgent	Boolean	Yes	Verification status	True or False

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 Employee Onboarding Agent do?

A: Employee Onboarding Agent automates the retrieval, classification, and processing of employee onboarding requests from HR email systems. It intelligently analyzes emails and attachments, extracts employee information using AI, validates data accuracy, and routes exceptions for human verification when required. The solution sends automated onboarding confirmations and status notifications to employees and HR teams, ensuring a streamlined, accurate, and governed onboarding process.

Q2. Is human approval mandatory for all actions?

A: No, it depends on the situation (if the document is not verified or have incorrect data).

Q4. Can the bot run unattended?

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

Q8. How secure are credentials?

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

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	2026-01-12	Niketan Rana	Flow design of the Employee Onboarding Agent.
2	1.0	2026-01-12	Niketan Rana	Created the Web Credential for Gmail.
3	1.0	2026-01-12	Niketan Rana	Connect Email and tested to download all the today's date mail.
4	1.0	2026-01-12	Niketan Rana	AI Agent for Verification
5	1.0	2026-01-12	Niketan Rana	Tool for extraction and formatting AISkill
6	1.0	2026-01-12	Niketan Rana	Added Human-in-the-Loop approval form
7	1.0	2026-01-12	Niketan Rana	Integrated Verification Agent with Main Agent
8	1.0	2026-01-12	Niketan Rana	Integration Testing.
9	1.0	2026-01-12	Niketan Rana	Fix of the error and prompt optimization.
10	1.0	2026-01-12	Niketan Rana	Completed documentation and configuration guide
11	1.0	2026-01-12	Niketan Rana	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