Recruitment Products Integration

Access Recruit to Screening Datahub Integration

Access UK Ltd.
The Old School, Stratford St.Mary
Colchester, Essex
CO7 6LZ, United Kingdom

T 01206 322 575
T 0845 345 3300
F 01206 322 956
E info@theaccessgroup.com

Contents page

Overview

This integration allows a flow of data relating to candidate screening checks to feed into Access Recruit. It is an automated process.

Please note that you will need to have an account with Access Screening for the integration to work.

Data transferred

- Tags
- Background check status (Completed status only)
- URL to candidate's background check (this can only be accessed if the User has access to Access Screening)

The Transfer Process

The transfer process is automated and runs in real time to return any updates on background checks into Access Recruit.

Services involvement

The aRecruit or Screening consultant shares the Access Recruit and Screening Integration guide with the customer from the outset of the implementation. This will allow the customer to do an end to end test of both products when they are in UAT.

The integration will be setup by the aRecruit and Screening consultants.

Running a check and seeing the results

To initiate the Screening request, you will have to configure it with the transitions in Access Recruit.

Go to config → Workflows → Transitions → New

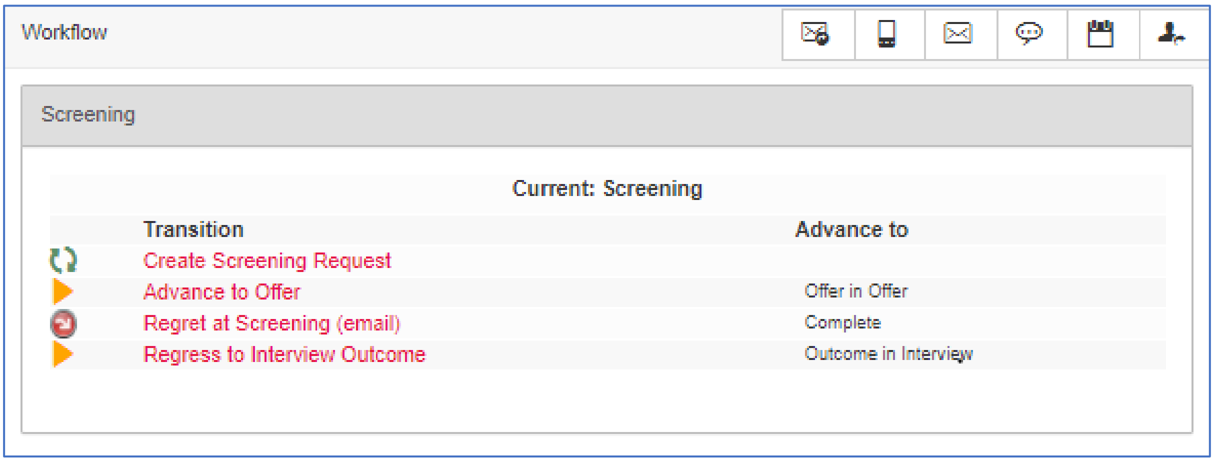
Enter the details and set the Workflow type = Application, Workflow subtype = "Selection" and Action = "Create Screening Record".

The rest of the details should be filled as required for this particular transition to perform. The building of the rest of the workflow remains the same.

Starting the Screening process from Access Recruit

To start the process, you will need to login to you Access Recruit system and find the application you want to send for screening.

The application will need to be in the screening stage where you will then have the following options:



Select the ‘Create Screening Request’ transition and the system will send a request to the screening software to start the screening process.

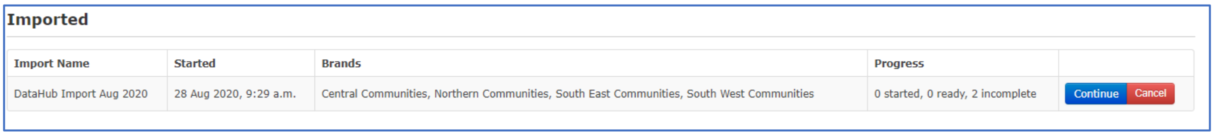
You can check this has been sent by clicking on the application reference. This will take you to the application screen. On here you should see the screening record with an ID and the status should be ‘in progress’.

When a screening request has been created in Recruit, the candidate information is imported from Recruit into the Screening system.

Starting Background Checks from Screening

To view the candidates that have been imported from Recruit and start the background check process you will need to select the Start Background Check button which appears on the 'Overview' and 'Background Check' tabs and then select Bulk Import

You will then be presented with the following screen which has details of the import:


Imported

Import Name	Started	Brands	Progress	
DataHub Import Aug 2020	28 Aug 2020, 9:29 a.m.	Central Communities, Northern Communities, South East Communities, South West Communities	0 started, 0 ready, 2 incomplete	Continue Cancel

Once you have clicked 'Continue' the candidate(s) will be in a status of 'Not Configured'. You will be required to select a candidate or multiple candidates y clicking on the lines and configure the following:

Brand/Workflow – select the Brand/Workflow the candidate(s) need to go on

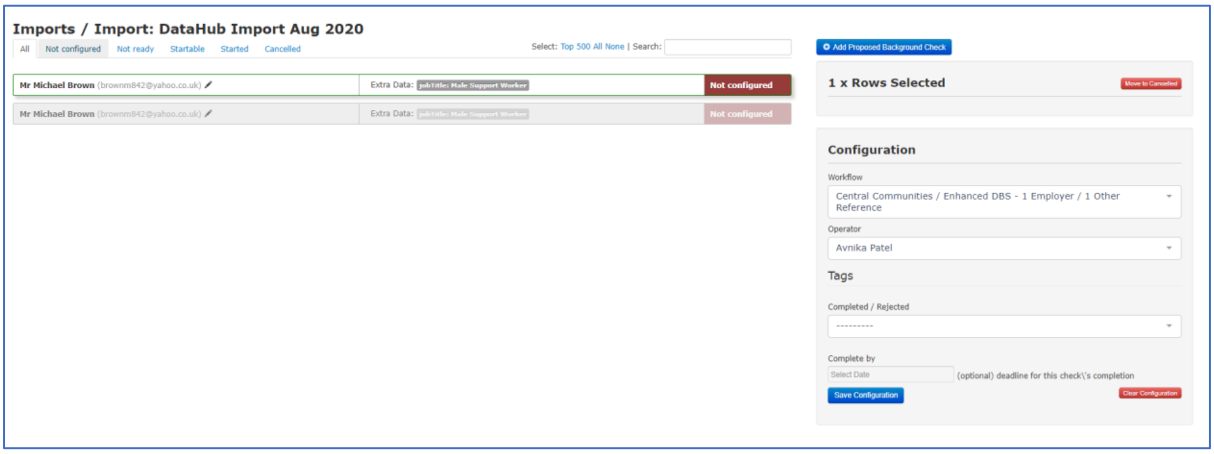
Operator – select the operator that is going to be dealing with the candidate(s) background checks

Tags – enter any Tag information that is required at this stage

Complete by – enter a date the background checks need to be completed by (if required)
Please note: if your system administrator has configured the SLA days, this will be greyed out.

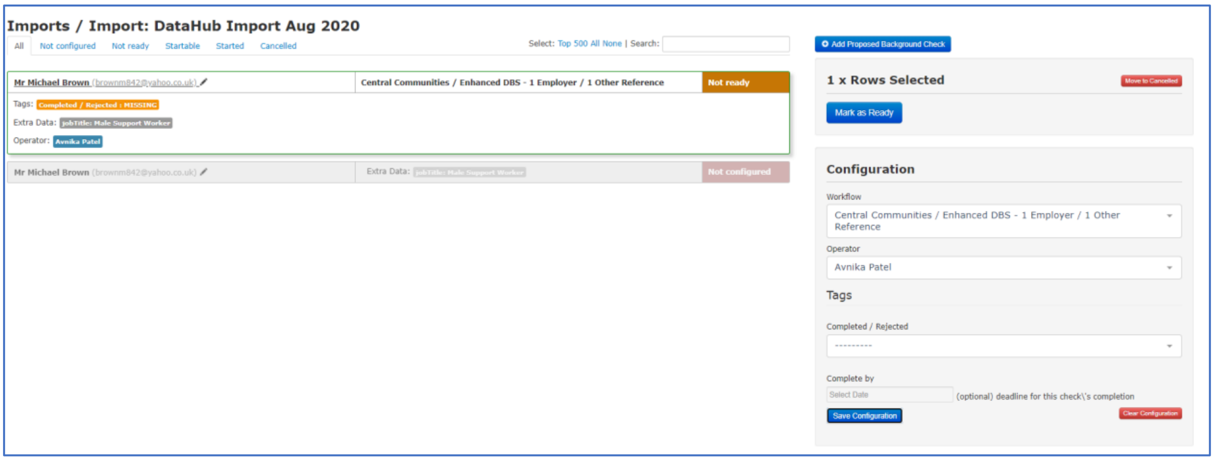
Choose file - Upload any DocuSign candidate specific documents (if enabled)

Once complete, click 'Save Configuration 'to progress the candidate(s).

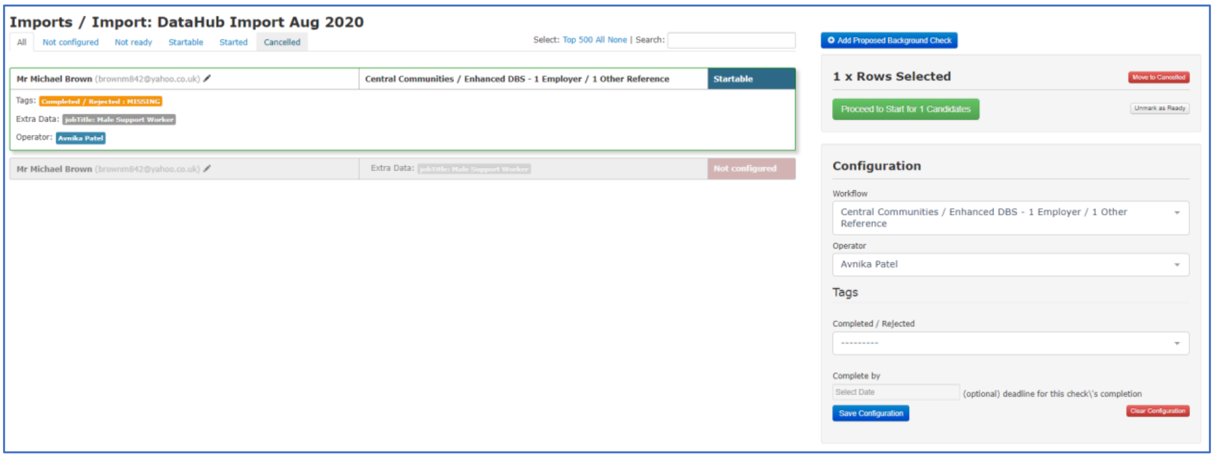


The status of the selected candidates will now be at 'Not Ready'. The next step is the make the background checks 'Startable' by clicking on 'Mark as Ready'.

At this point you can go in and change the configuration for the candidate, if required.



The status of the background check is now at 'Startable'.



Click on ‘Proceed to start for (x – this will be the number of candidates) candidates’ to progress the initiation of the background checks to the final stage.

This will give you a summary of all the background checks that are going to be started. You can click on a workflow name which will let you know which candidates are going to be started and the operator who is going to deal with the background checks. Once you are happy with the summary, click ‘Start and Notify X (this will be the number of candidates) Candidate’.

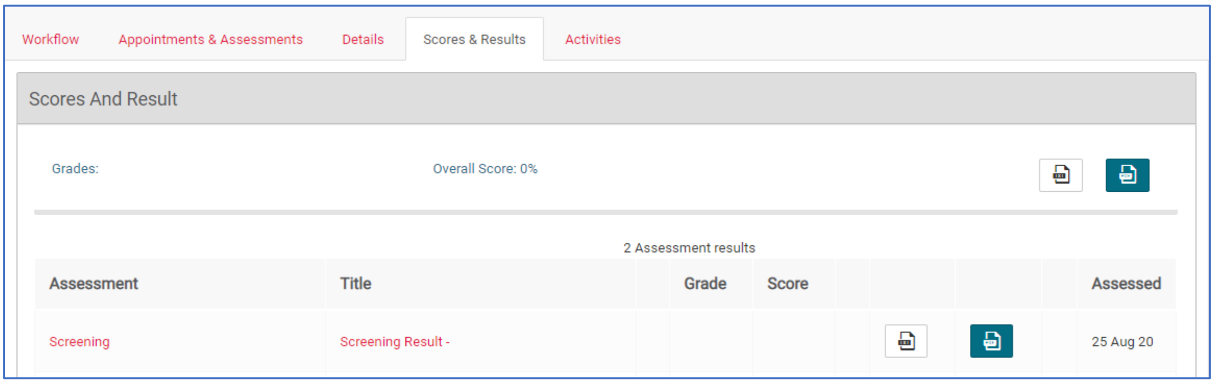
This will create a background check page for the candidate with a unique BC number and send an email to the candidate(s) with a link to the candidate portal.

The Screening process will follow on as normal from here.

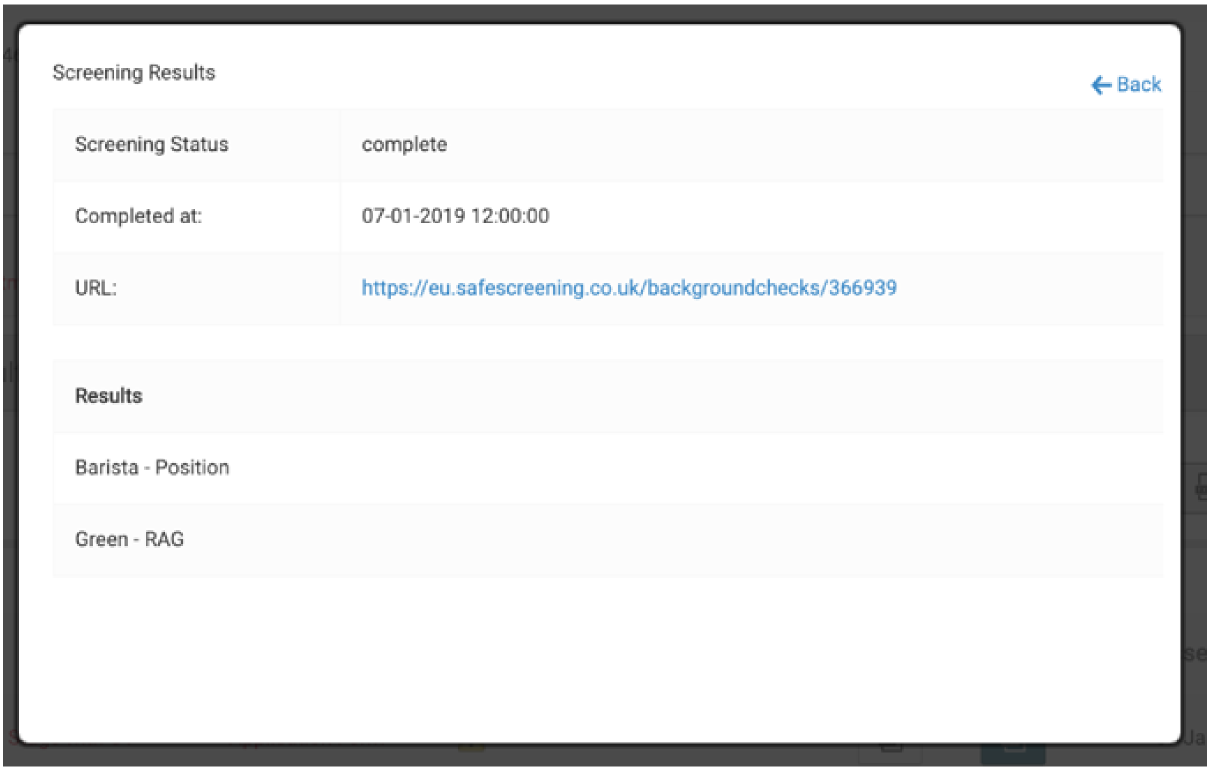
Viewing the Screening information in Access Recruit

Once the screening has been completed the status of the screening record in Access Recruit will change to complete. As before, you can check this by clicking on the application reference of the application you have sent for screening.

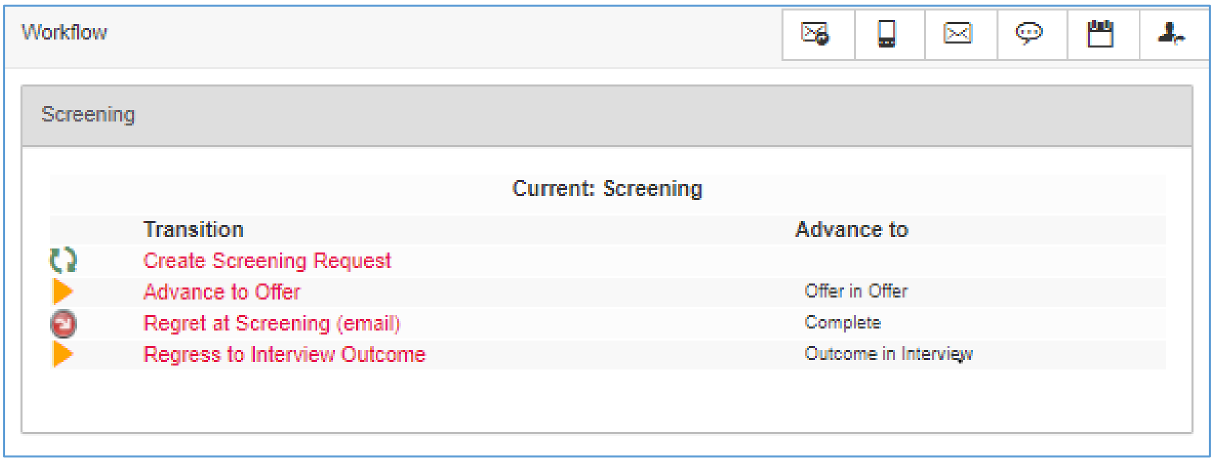
Once the status is set to complete, you can view the screening results by selecting ‘Scores and Results’ from the application screen.



The button from this screen will provide a link back to the screening software where you view the full results.



Once you have reviewed the results you can use select the 'Advance to...' transition to continue progressing the application. If you decide not to progress this candidate any further after the screening stage, you can press 'Regret at Screening (email)' to mark their application as complete. This will also send the candidate an email letting them know their application has not been successful.


Workflow
Screening
Current: Screening
Transition
Advance to
Create Screening Request
Advance to Offer
Offer in Offer
Regret at Screening (email)
Complete
Regress to Interview Outcome
Outcome in Interview

UAT & Switch To LIVE

Please note that all testing will be conducted in your Demo or Live Access Recruit system (dependent on where the customer wants to test). If it is setup in Demo, Access Recruit consultant will change it to Live once the customer is happy with UAT.

The Screening testing will be conducted in the Demo Screening account. Once UAT has been completed, the Screening Implementation team will clear your Demo Screening account as part of the Screening Go Live process.

Support

Please contact your Access Recruit Support team for any issues or queries arising from this document.

All other queries should be directed to your Account Manager or Customer Success Manager.