

Recruitment Products Integration

Access Profile to Access Screening

Contents page

CONTENTS PAGE	2
OVERVIEW	2
DATA TRANSFERRED	3
THE TRANSFER PROCESS AND SCHEDULED TASK	3
SERVICES INVOLVEMENT	4
RUNNING A CHECK AND SEEING THE RESULTS.....	6
UAT & SWITCH TO LIVE	14
SUPPORT	14

Overview

This integration allows a flow of data relating to candidate screening checks to feed into Access Profile. 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

- Background check status
- Candidate PDF

The Transfer Process and Scheduled Task

The transfer process is automated and scheduled.

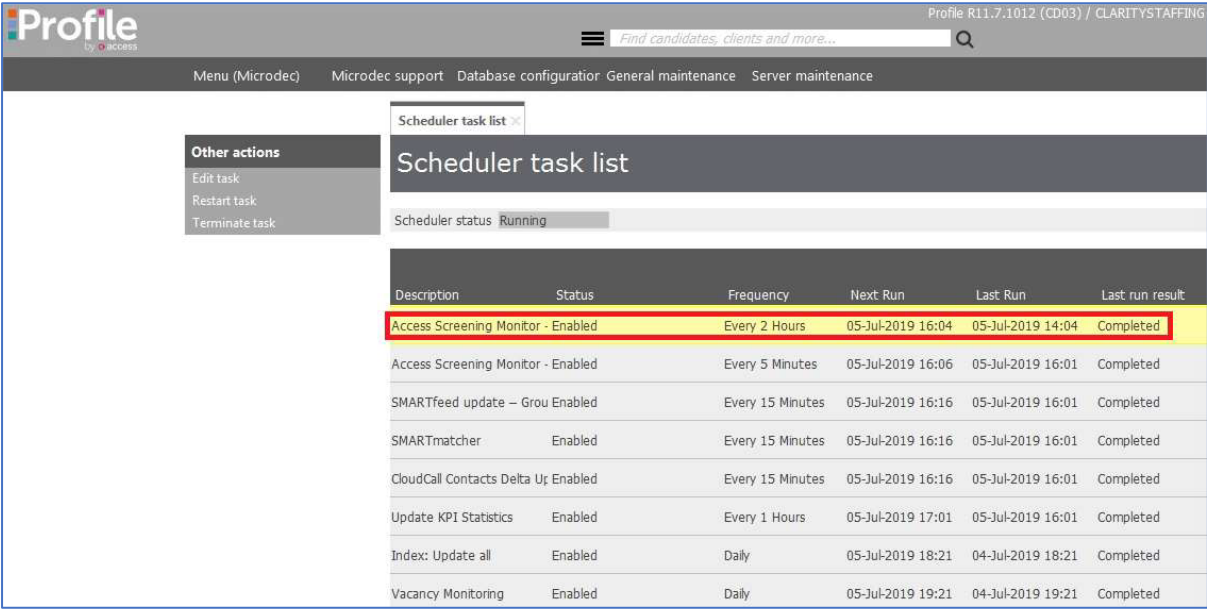
This will be applied by the Installation Engineer but for on-premise customers, the Profile System Administrator at the client organisation may wish to change the frequency of the connection to the Screening API.

Scheduled Task Configuration

The customer's Profile System Administrator for on-premise deployments, can also configure the Profile Scheduled task so that it runs at the frequency that the client wishes.

The scheduled task will regularly connect to the Screening API to obtain the latest status of screening requests and to update the records in Profile accordingly.

An image of the Task List with the Screening task highlighted is shown below.



Profile R11.7.1012 (CD03) / CLARITYSTAFFING

Find candidates, clients and more...

Menu (Microdec) Microdec support Database configuration General maintenance Server maintenance

Scheduler task list

Scheduler status: Running

Description	Status	Frequency	Next Run	Last Run	Last run result
Access Screening Monitor - Enabled	Enabled	Every 2 Hours	05-Jul-2019 16:04	05-Jul-2019 14:04	Completed
Access Screening Monitor - Enabled		Every 5 Minutes	05-Jul-2019 16:06	05-Jul-2019 16:01	Completed
SMARTfeed update – Grou	Enabled	Every 15 Minutes	05-Jul-2019 16:16	05-Jul-2019 16:01	Completed
SMARTmatcher	Enabled	Every 15 Minutes	05-Jul-2019 16:16	05-Jul-2019 16:01	Completed
CloudCall Contacts Delta Up	Enabled	Every 15 Minutes	05-Jul-2019 16:16	05-Jul-2019 16:01	Completed
Update KPI Statistics	Enabled	Every 1 Hours	05-Jul-2019 17:01	05-Jul-2019 16:01	Completed
Index: Update all	Enabled	Daily	05-Jul-2019 18:21	04-Jul-2019 18:21	Completed
Vacancy Monitoring	Enabled	Daily	05-Jul-2019 19:21	04-Jul-2019 19:21	Completed

The task list will be familiar to all trained Profile System Administrators.

Once the API Key is configured and the scheduled task is running then consultants can start submitting Screening requests via Profile.

Services involvement

An API key will be setup by the Screening consultant and the initial integration configuration will be setup by a Profile installation engineer. Support is handled via Profile support.

How to configure the integration

You will need to be on a minimum version of R11.6 to run the integration if you are on-premise.

If you are on a hosted version of Profile, you will only need access to your account.

You will also need access to an Access Screening account.

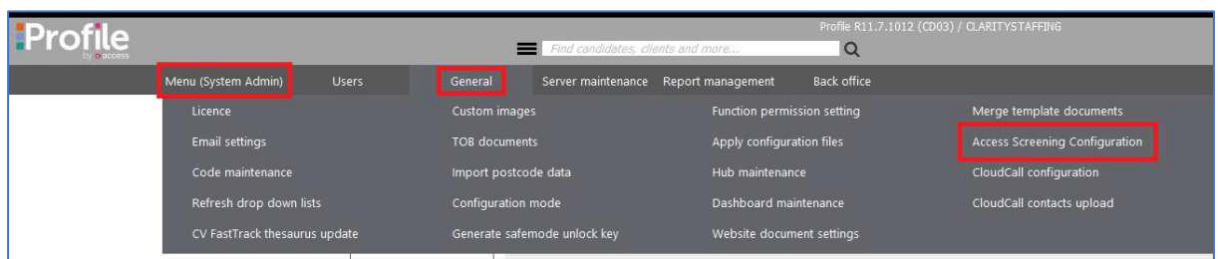
Setting up the integration

As part of the Screening implementation process, an API Key will be made available via the screening system.

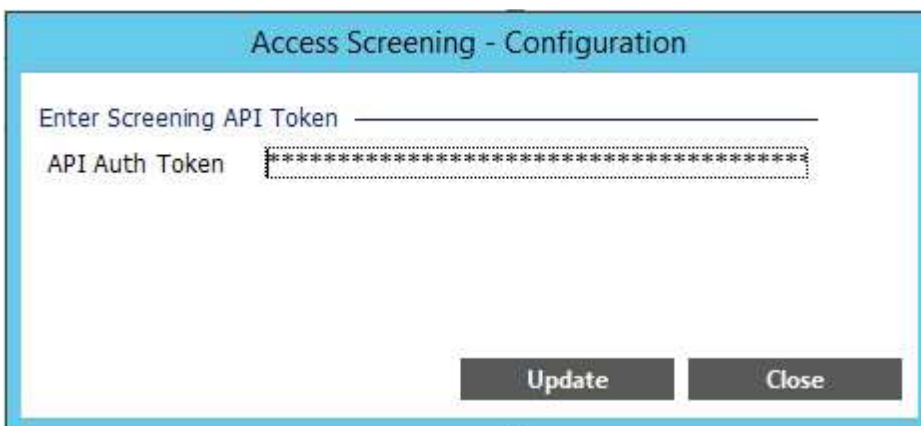
A new user will be set up called 'API User' under Users & Permission, to view the API Token you will need to edit against this user.

How to setup the API key in Profile (Installation Engineer or Customer)

1. In Profile, in the System Administrator's menu, there is an option to select the General menu followed by the Access Screening Configuration menu.



2. On selection of this menu, the following window is displayed. Enter the API key into the 'API Auth Token' field.


 A screenshot of the 'Access Screening - Configuration' dialog box. It has a title bar with the text 'Access Screening - Configuration'. Inside, there is a text input field labeled 'Enter Screening API Token'. Below it is a masked input field labeled 'API Auth Token' with asterisks. At the bottom right, there are two buttons: 'Update' and 'Close'.

3. Once entered, click 'Update', to save changes.

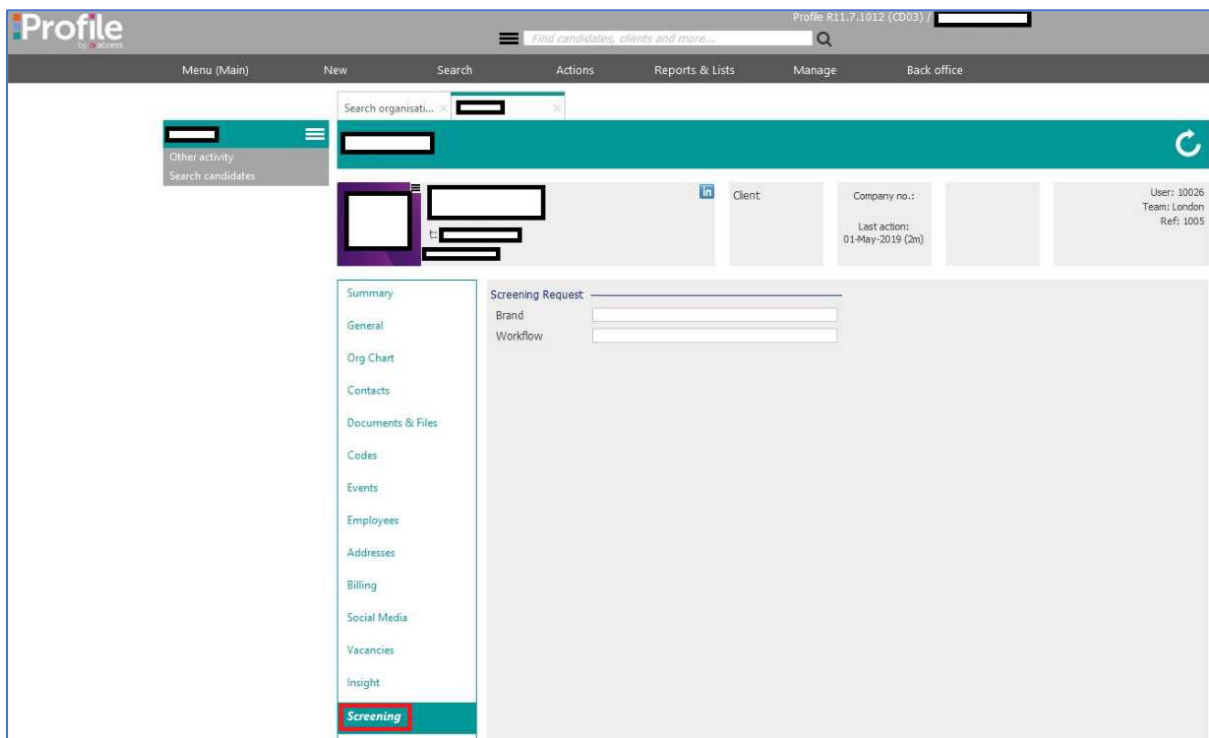
Running a check and seeing the results

Organisation Configuration

A tab called Screening has been provided within the Organisation records in Profile. This allows the Consultant to define the default Brand and Workflow settings for each Organisation.

These defaults are displayed to the user when requesting Screening but the consultant can select any other brand or screening settings that are available (see section displaying the confirmation screen).

The Profile Organisation Form is shown below with the Screening tab highlighted in red.



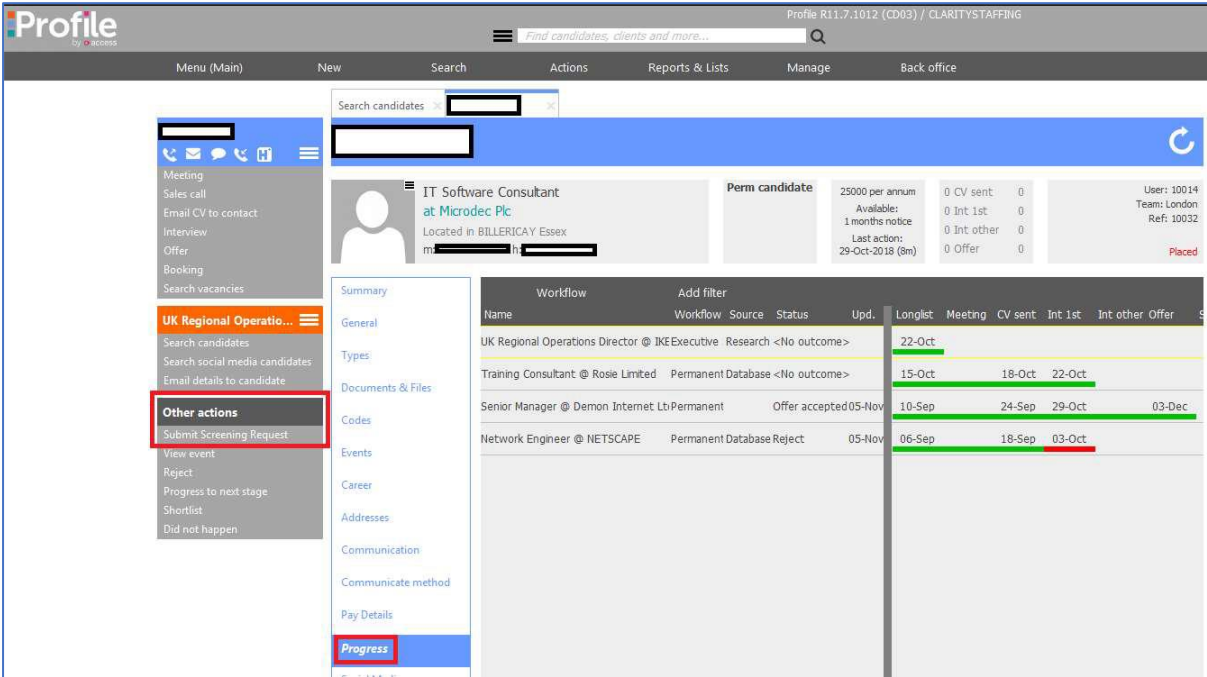
The screenshot shows the Profile Organisation Form interface. The top navigation bar includes 'Menu (Main)', 'New', 'Search', 'Actions', 'Reports & Lists', 'Manage', and 'Back office'. The main content area is divided into a left sidebar and a main panel. The sidebar contains a list of tabs: 'Summary', 'General', 'Org Chart', 'Contacts', 'Documents & Files', 'Codes', 'Events', 'Employees', 'Addresses', 'Billing', 'Social Media', 'Vacancies', 'Insight', and 'Screening'. The 'Screening' tab is highlighted in red. The main panel displays the 'Screening Request' form, which includes fields for 'Brand' and 'Workflow'. The top right corner of the form shows user information: 'User: 10026', 'Team: London', and 'Ref: 1005'.

Submitting Screening Requests from Profile

Consultants using Profile can submit Screening requests from the Progress tab from either a Vacancy record or a Candidate record.

The Submit Screening Request menu item is highlighted in red in the image below, using a Candidate record as an example.

The selection of the Progress tab is also highlighted in red. The black, redacted details relate to the person record used for the example.



Profile R11.7.1012 (CD03) / CLARITYSTAFFING

Find candidates, clients and more...

Menu (Main) New Search Actions Reports & Lists Manage Back office

Search candidates

Meeting
Sales call
Email CV to contact
Interview
Offer
Booking
Search vacancies

UK Regional Operatio...

Search candidates
Search social media candidates
Email details to candidate

Other actions

Submit Screening Request

View event
Reject
Progress to next stage
Shortlist
Did not happen

Summary

General

Types

Documents & Files

Codes

Events

Career

Addresses

Communication

Communicate method

Pay Details

Progress

IT Software Consultant
at Microdec Plc
Located in BILLERICA Essex
m [redacted] h [redacted]

Perm candidate

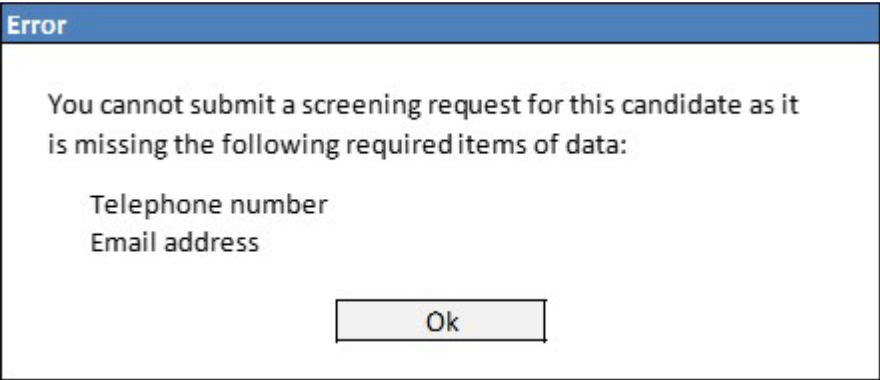
25000 per annum
Available:
1 months notice
Last action:
29-Oct-2018 (8m)

0 CV sent: 0
0 Int 1st: 0
0 Int other: 0
0 Offer: 0

User: 10014
Team: London
Ref: 10032
Placed

Name	Workflow	Source	Status	Upd.	Longlist	Meeting	CV sent	Int 1st	Int other	Offer
UK Regional Operations Director @ IKE	Executive Research	<No outcome>			22-Oct					
Training Consultant @ Rosie Limited	Permanent Database	<No outcome>			15-Oct	18-Oct	22-Oct			
Senior Manager @ Demon Internet Lb	Permanent	Offer accepted	05-Nov		10-Sep	24-Sep	29-Oct		03-Dec	
Network Engineer @ NETSCAPE	Permanent Database	Reject	05-Nov		06-Sep	18-Sep	03-Oct			

If the required data is not already populated in the candidate record, a window detailing the missing data is presented to the consultant and they must go into the candidate record and complete the missing fields before re-submitting the screening request.



Error

You cannot submit a screening request for this candidate as it is missing the following required items of data:

Telephone number
Email address

Ok

If the data is fully populated, a confirmation screen is provided to the consultant and they can either Submit the request or Cancel the request. See Image below:

Submit Access Screening Request

Candidate

Benedict Wong

Organisation

J J B Engineering Ltd.

Vacancy

Aeronautical Technician

Brand

Brand A

V

Workflow

Workflow 3

V

Status

^

V

Submit

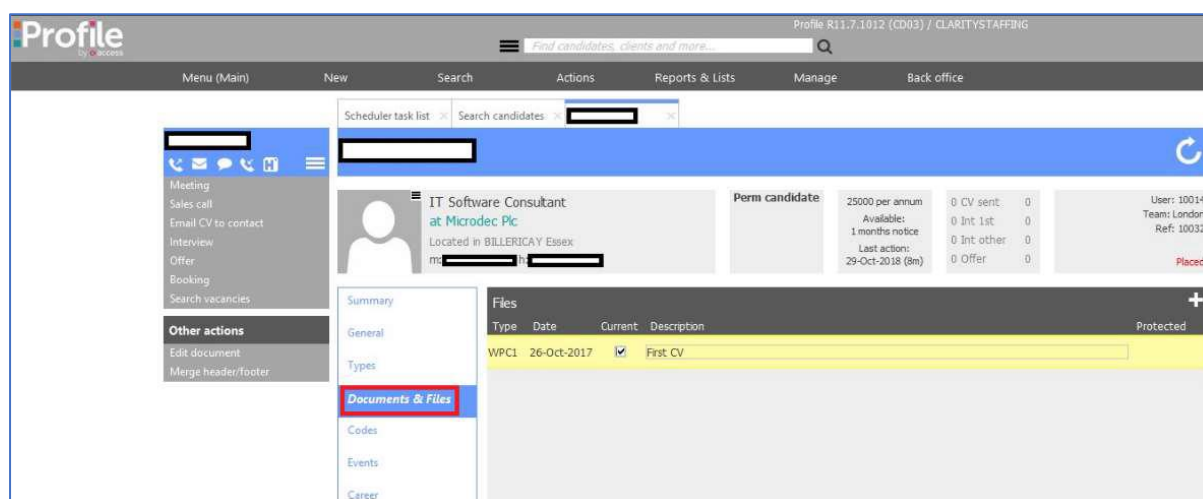
Cancel

When the request is submitted, an event is created in Profile against the Vacancy and Candidate records, showing that the request is in progress.

Summary Screening Documents

Once screening requests have been submitted, the scheduled task will regularly connect to the Screening API. This will be to update the status of the request and to load the summary document into the candidate's record Documents and Files tab once the screening is completed.

The following image shows where the summary document is stored in the Candidate record.

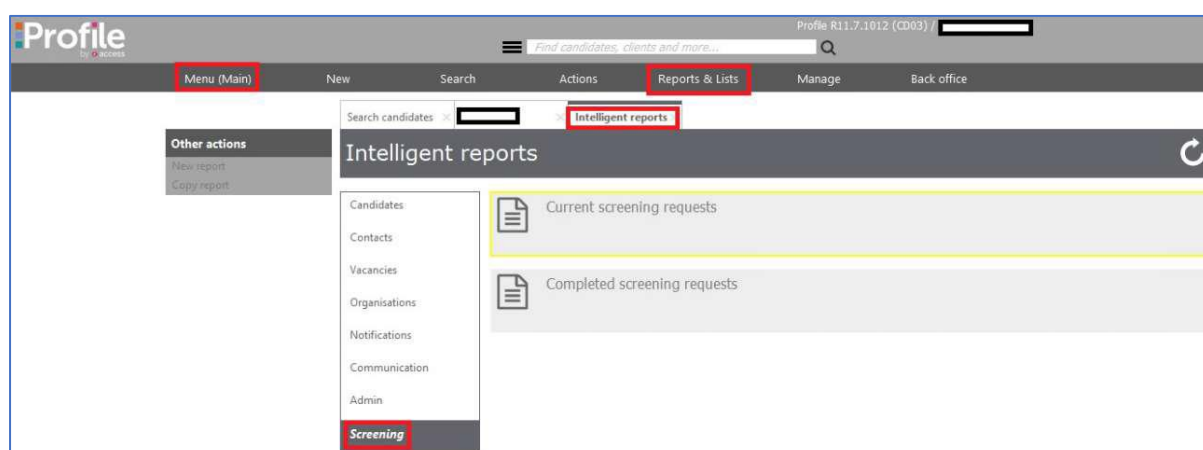


The red highlighting shows where to select the Documents and Files tab and the Summary Document will appear as a new line, beneath the First CV file that is already saved for this example candidate. It can be opened by double clicking the entry in the Files list.

Intelligent Reports

There are two intelligent reports in Profile that can be viewed to display the outstanding requests. These reports are selected as shown in the following image.

From the main menu, select the Reports & Lists menu and from the resulting drop-down menu, select the Intelligent Reports option. On the Intelligent Reports window, select the Screening tab to display the individual screening reports.



Once the required report is selected the reports are displayed as shown in the examples below.

Current Screening Requests:

This displays work in progress screening requests.

[illegible]

Completed Screening Requests:

This intelligent report will show all screening requests that have completed in the last 7 days for the current user, by default.

Completed Screening Requests

[illegible]

Close

Field Mapping

Request Mapping

JSON Element	Type	Database Column	Notes
title	text	person.title	
first_name	text	person.first_name	First string up to space
last_name	text	person.last_name	
email	text	person.email_address	
brand_uuid	uniqueidentifier	u_screening_brand.brand_id	
workflow_id	integer	u_screening_workflow.workflow_id	
your_reference	text	oppportunity.opportunity_ref + "/" + person.person_ref	
middle_name	text	person.first_name	Remainder of first_name after processing the first_name field above.
date_of_birth	date	person.date_of_birth	Format yyyy-mm-dd
contact_number	text	address.zc_telephone_number	From main address

gender	text	person.gender	M > m, F > f
n_i_number	text	temp_details.national_ins_no	
nationality	text	person.nationality □ (mapped value)	2 character ISO code. See Appendix A.
addresses – Main address only (address.main_address = “Y”)			
line_1	text	address.address_line_1	
line_2	text	address.address_line_2 + address.address_line_3	
post_town	text	address.post_town	
county	text	address.county_state	
post_code	text	address.zipcode	
country	text	address.country_code (mapped value)	2 character ISO code.
from_date	date	null	Format yyyy-mm-dd
to_date	date	null	Format yyyy-mm-dd
to_present	boolean	true	
tags			
tag_type			
tag			
completion_redirect	URL	INI C05	null if empty
suppress_invite	boolean	INI C06	
single_session	boolean	INI C07	
operator_email	text	INI c08	null if empty

Response Mapping

JSON Element	Type	Database Column	Notes
count	integer	N/A	Number of brands in result set
next	url	N/A	Pointer to next page of results
previous	url	N/A	Pointer to previous page of results

results			
uuid	uniqueidentifier	u_screening_brand.brand_id	
name	text	u_screening_brand.description	
		u_screening_brand.available	Set to "Y".
workflows			
name	text	u_screening_workflow.description	
		u_screening_workflow.available	Set to "Y".
id	integer	u_screening_workflow.workflow_id	
mandatory_tags	list	N/A	Ignore
optional_tags	list	N/A	Ignore
employment_contract_types	list	N/A	Ignore
academic_enrollment_types	list	N/A	Ignore

UAT & Switch To LIVE

The Screening Implementation team will clear your Demo Screening account as part of the Screening GO LIVE process.

Support

Please contact your Access Profile 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.