



SAP Success Factors

Client Settings



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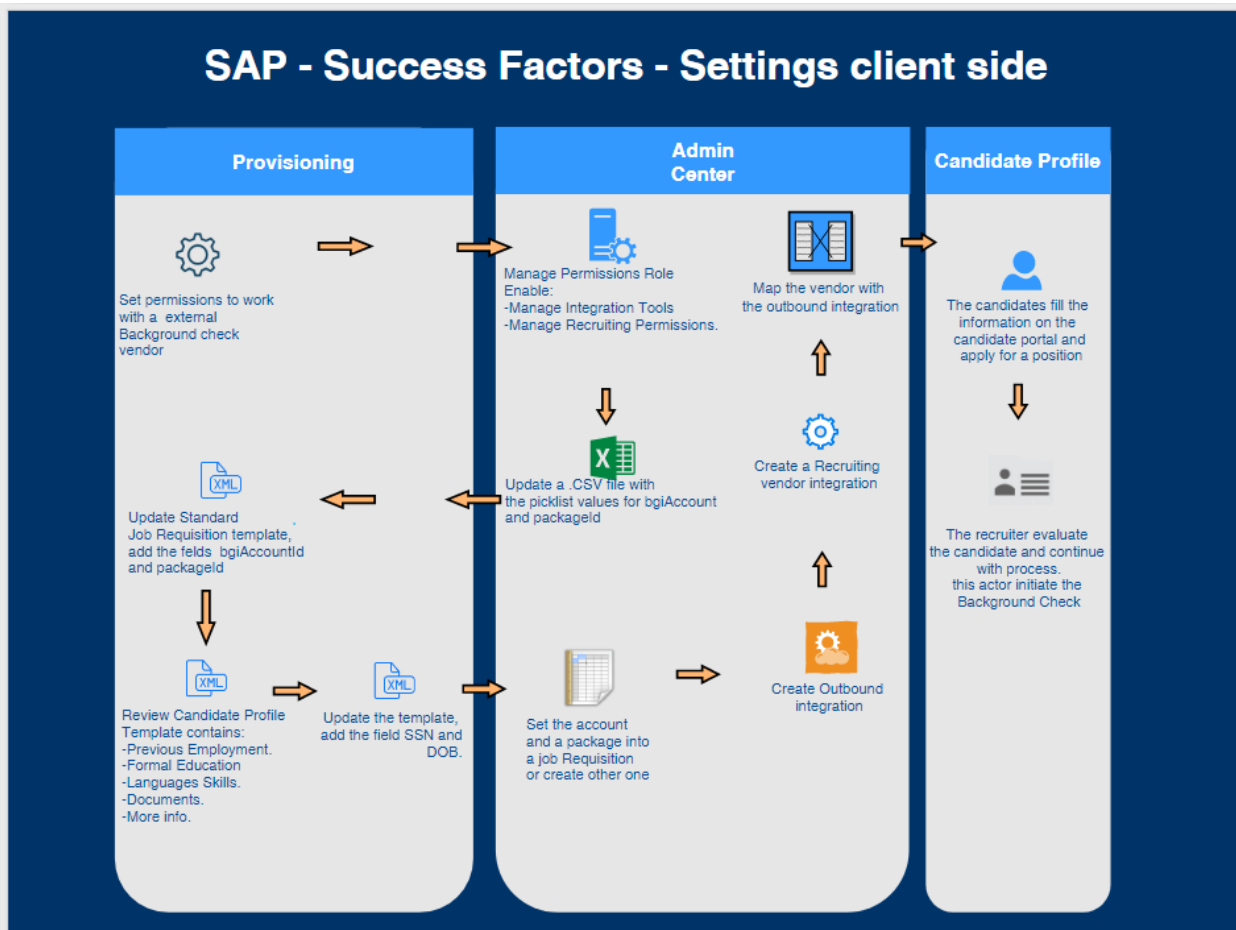
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Initial Settings

Prerequisites

1. Have user and password for the “Provisioning” website
 (https://salesdemo4.successfactors.com/provisioning_login), provided by SAP.
2. Have user and password for the “Bestrun” or “SalesDemo” website
 (https://salesdemo4.successfactors.com/login?company=SFPART015956), provided by SAP.

Steps





Set the permission to work with a background check with external vendor – Provisioning

- 1) It is necessary to allow the execution of the background check using an external vendor, to proceed, access to our provisioning account and select our company:
- 2) This is the main page on the provisioning website, choose the company name :

The screenshot shows the 'SuccessFactors Business Execution Suite™ PROVISIONING' interface. The main heading is 'Companies'. Below it, there are navigation tabs: 'Company Details', 'New Company', 'Clone Company', 'Reports', 'Operations/Maintenance', 'SMB', 'Manage Provisioners', 'Manage WFA URLs', 'SuccessStore', and 'Upgrade Center Media Content'. A 'List of Companies' section includes a search filter (0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Others show all...) and a 'Show License' button. A table lists company details:

Company Name	Company ID	Total Seats	Seat Enforcement Option	Expiration Date	Expiration Enforced	DT
Company Name	SFPART015956	0	None	10/05/2017		dbPoo

Below the table, there is a section titled 'Customize Company Instance' with the text: 'To modify or continue installation process of a company instance, please click the company's hyperlink above.'

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- 3) Search the section “Edit Company Settings” and click on the item “Company Settings”

The screenshot shows a zoomed-in view of the 'Companies' page. The 'Edit Company Settings' section is expanded, and the 'Company Settings' link is highlighted with a red box. Other links in the list include 'Edit Home Page Content' and 'Pick a Company UI skin'.



- 4) In the “Company Settings” section search the item “Recruiting”, and mark the checkbox “Enable Background check”, select the radio “Other Background check”

Recruiting

- Use email as external applicant userId
- Enable Job Board Posting
- Enable Source Quality Portlet
- Enable Mass Copy Job Requisitions (Maximum copies allowed 30):
- Enable Applicant view as a pop-up
- Enable Candidate Search OFCCP compliance warning and auditing (for US-based job reqs)
- Enable Radial Candidate Search
- Enable Candidate Conceptual Search (Available only for customers in the following datacenters: DC4, DC8 and DC12)
- Enable Job Alerts for Candidates
This feature will enable a scheduled job. You must specify a valid user to own that job:
- Enable Background Check
 - VI Background Check Integration
 - First Advantage Background Check Integration
 - Other Background Check Vendor
- Enable Onboarding integration
 - VI Onboarding Integration
 - BizX Onboarding Integration (requires BizX Onboarding)
- Enable Stack Rank style Interview Assessments

With these steps we enable to work with another vendor, besides the default that is selected.

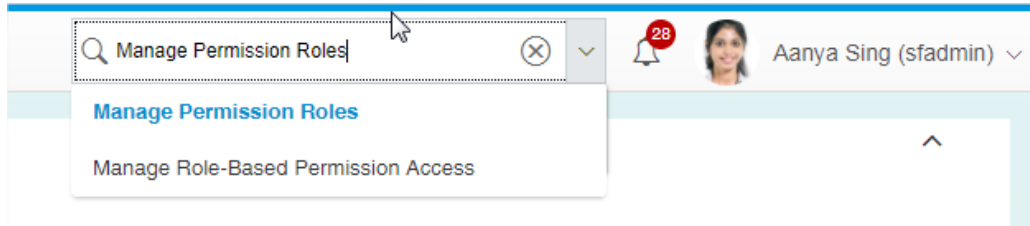


Manage Permissions Role - Check Correct Permission – Salesdemo

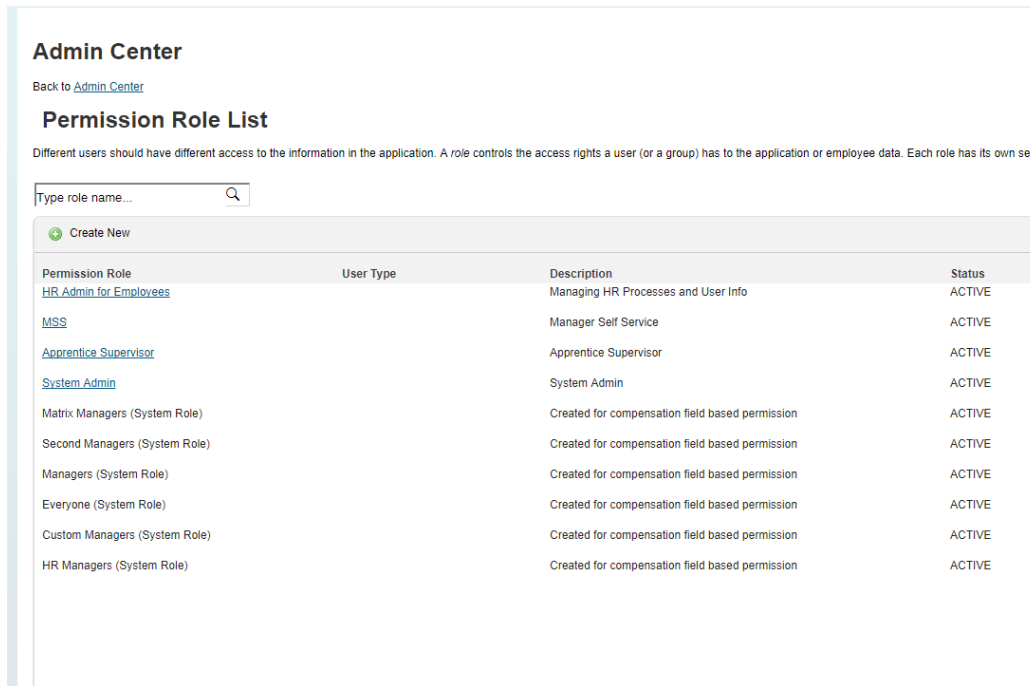
Assigning the correct permissions will allow us to perform some tasks such as creating Job requisitions, start background check, read information through OData API, etc., it's necessary to check the permissions for the users, and in the next lines check how to enable some of the basic permissions.

Ensure user(s) have permission to initiate background checks and recruiting; follow the steps below to verify:

- 1) On the search box type “Manage Permission Roles” and hit enter.



- 2) This option will display the list of roles, click on the correct role, in this case we will use the Role “HR Admin for Employees”:





3) After you click the role, you will see the list of permissions already enabled for this role, click on the “Permission” button:

Admin Center

[Back to Admin Center](#)

Permission Role Detail

1. Name and description

Role Name:	HR Admin for Employees
Description:	Managing HR Processes and User Inf

2. Permission settings

Specify what permissions users in this role should have.

Permission...

▼ **Permission not requiring target**

General User Permission

- User Login
- Live Profile Access
- Mobile Access
- Permission to Create Forms(All)
- Professional Edition Manage Workflow Requests

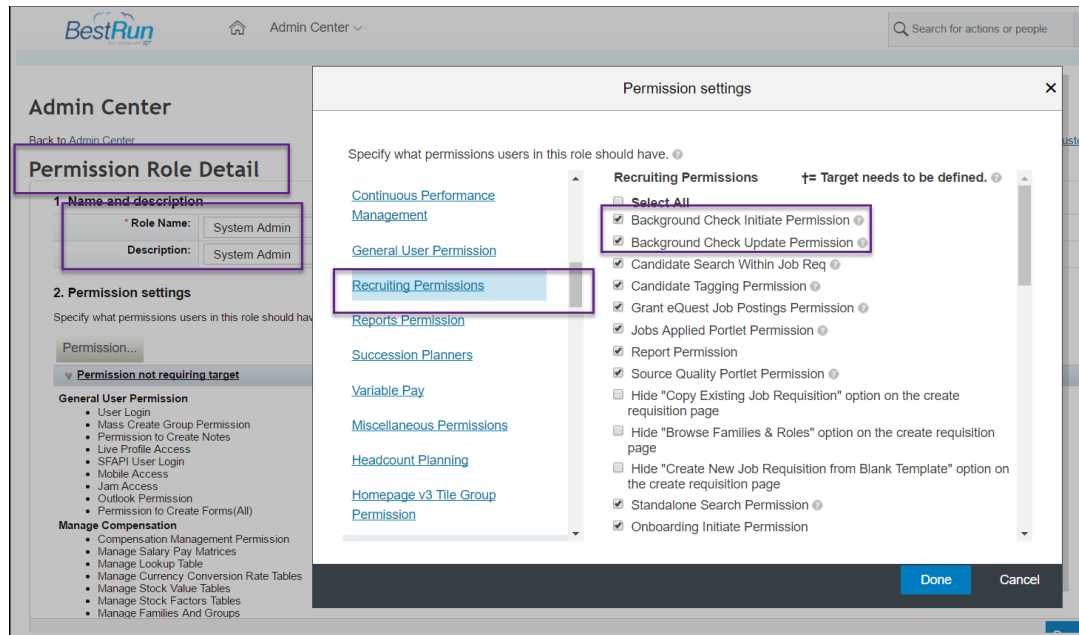
Manage Compensation

- Compensation Management Permission
- Manage Salary Pay Matrices
- Manage Lookup Table
- Manage Currency Conversion Rate Tables
- Manage Stock Value Tables
- Manage Stock Factors Tables
- Manage Families And Groups
- Manage Merit Matrices
- Budget Override
- Export Employee Compensation Data
- Manage Job Code and Pay Grade Map
- Manage Compensation Plan Template
- Generate Compensation Hierarchy for Rollup Report
- Manage Compensation Planner Permission
- Manage Stock Participation Guideline Tables
- Manage Field Permission Groups
- Manage Compensation Modeling

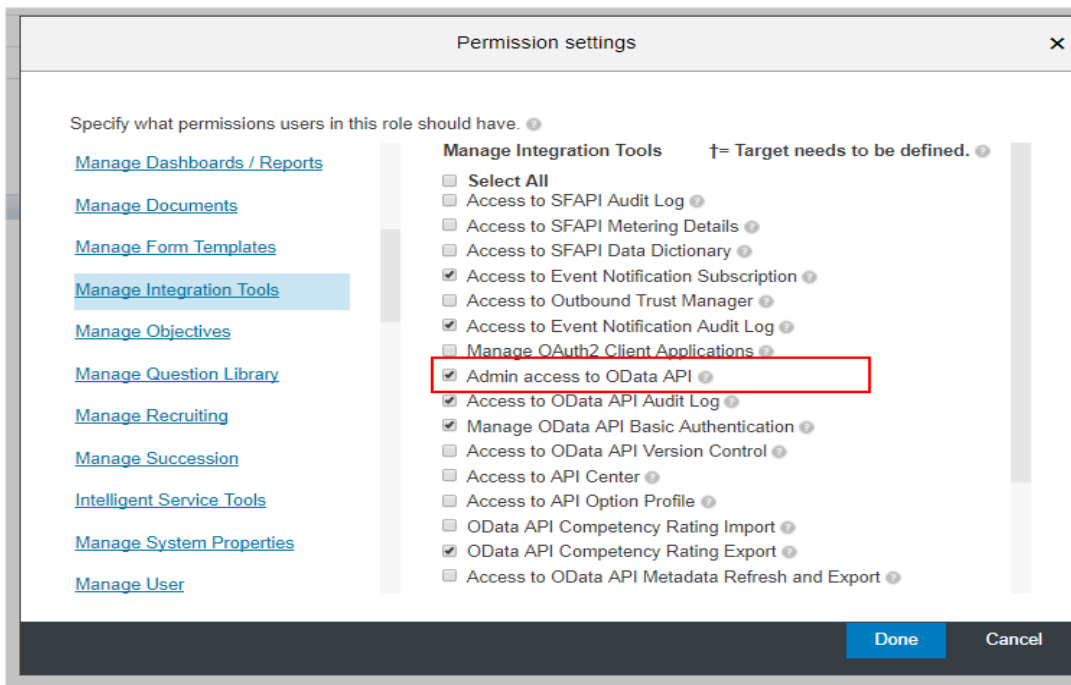
Succession Planners

- Matrix Report Permission

- 4) On the left is the section “Recruiting Permissions” and on the right side are permissions to enable for the role:



- 5) In the same form, its necessary to enable access to OData API, the section is “Manage Integration Tools”, and mark the checkbox as the following image:





Update the picklists files provided by the vendor – Salesdemo

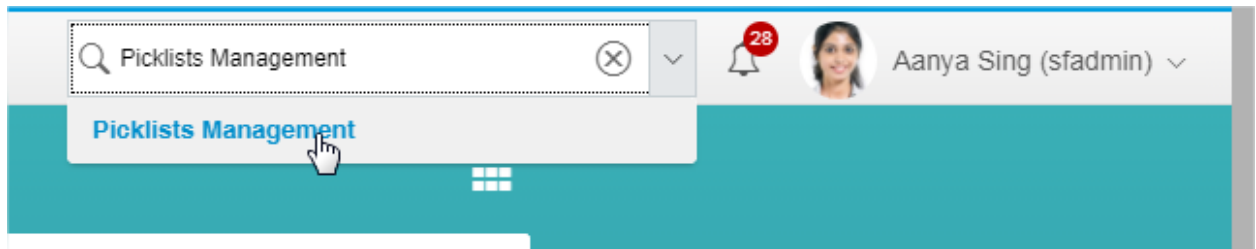
The pick lists contain the custom fields for options when you select a job requisition form; we must update a .csv file with the below format (double click to check it):



New_Picklists.csv

^picklistId	OptionId	minValue	maxValue	value	status	external_cc	parentOpti	en_US	zh_CN
bgiAccountld		-1	-1	-1	ACTIVE	1	-1	Account 1	Account 1
packageld		-1	-1	-1	ACTIVE	1	-1	Full Order	Full Order
packageld		-1	-1	-1	ACTIVE	2	-1	Half Order	Half Order

- 1) To update the picklists file go to Admin Center and on the search option type “Picklists Management”





2) On the “Picklists Management” form, you will see the following option:

Admin Center

[Back to Admin Center](#)

Picklists

Import a CSV file to create new pick lists and/or remove the existing pick lists.

Request submitted for picklist export has completed Thursday, April 13, 2017 5:15:40 AM EDT [Download export](#)

Export data format
 Export all picklist(s)
 Import picklist(s)

Import File: [Choose File](#) No file chosen

Are all the Pick Lists **new**? In order to import an existing Pick List, you must

1. Export the particular Pick List(s)
2. Modify the Pick List(s)
3. Import the modified Pick List(s)

Yes
 No

Import the default (pre-packaged) picklists

Character Encoding: [Western European \(Windows/ISO\)](#)

Process as a batch process

[Submit](#)

3) There are already custom fields on the default template, so for security purposes, we download a backup of the current setup, click on “Download export” button and save the file.

Admin Center

[Back to Admin Center](#)

Picklists

Import a CSV file to create new pick lists and/or remove the existing pick lists.

Request submitted for picklist export has completed Tuesday, July 25, 2017 3:37:34 PM EDT [Download export](#)

Export data format
 Export all picklist(s)
 Import picklist(s)
 Import the default (pre-packaged) picklists

Character Encoding: [Western European \(Windows/ISO\)](#)

Process as a batch process

[Submit](#)



- 4) The next step is to upload the new fields for the picklists, select the radio “Import picklists” , click on “Choose File” button to select the file and then mark the radio as “Yes” to indicate that all the picklists are new

A screenshot of a web form titled "Import picklist(s)". The form contains several sections: 1. A radio button labeled "Import picklist(s)" is selected. 2. An "Import File:" label is followed by a "Choose File" button and the text "No file chosen". 3. A question: "Are all the Pick Lists **new**? In order to import an existing Pick List, you must" followed by a numbered list: "1. Export the particular Pick List(s)", "2. Modify the Pick List(s)", and "3. Import the modified Pick List(s)". 4. Two radio buttons: "Yes" (selected) and "No". 5. A radio button labeled "Import the default (pre-packaged) picklists". 6. A "Character Encoding:" label followed by a dropdown menu showing "Western European (Windows/ISO)". 7. A checkbox labeled "Process as a batch process". 8. A "Submit" button at the bottom right. Red boxes highlight the "Choose File" button, the "Yes" radio button, and the "Submit" button.

- 5) Click on the button “Submit” and the picklists file will be updated.



Update Standard Job Requisition Template - Provisioning

The Standard Job Requisition is the default template to fill when creating a job position and its possible to add new fields, in this case we will add the vendor account and the package name; this field will be used by the outbound integration. To update the requisition template with the fields recently updated on the picklists, follow these steps:

- 1- Access to the provisioning Account, go to the section “Managing Recruiting” and click on “Import/Update/Export Job Requisition Template”

- **Managing Recruiting**

- [Import/Update/Export Job Requisition Template](#)
- [Edit Job Requisition Application Template](#)
- [Edit Event Application Template](#)
- [Applicant Status Configuration](#)
- [View Data Dictionary for Ad-hoc Reporting](#)
- [Edit Candidate Profile Template](#)
- [Edit Candidate Privacy Options](#)
- [Job Requisition System Field Labels](#)
- [Recruiting Security Field Setup](#)
- [Application Field Labels](#)
- [Internal and External Applicant Search Settings](#)
- [Configure Reportable Custom Fields](#)
- [Configure Custom Tokens](#)
- [Import Background Check Transformation Template](#)
- [Import Onboarding Transformation Template](#)
- [Configure custom fields for Conceptual Search Basic Info Filter](#)
- [Import/Update/Export Offer Detail Template](#)
- [Job Code Custom Field Configuration Settings](#)
- [Migrate Job Code related Picklist](#)
- [Import/Export Candidate to employee integration template](#)
- [Import/Export Assessment Vendor Packages](#)
- [Configure Recruiting Marketing Datacenter URL](#)

Add a new job requisition Template or Update an existing one

Template File: No file chosen

Job requisition Templates			Save Changes
ID	Type	Name	Active Export
8	Job Requisition	Standard Job Requisition	<input checked="" type="checkbox"/>
601	Job Requisition	Simple Job Requisition	<input checked="" type="checkbox"/>
641	Job Requisition	US Job Requisition	<input checked="" type="checkbox"/>
661	Job Requisition	CAN Job Requisition	<input type="checkbox"/>

2- Export the template “Standard Job Requisition”, save a backup and make the following change over this file.

a) Add these fields to the end of the field-definition list as below:

```

<field-definition id="assessment" type="derived" required="false" custom="false">
<field-label><![CDATA[Assessment association]]></field-label>
<field-label lang="de_DE"><![CDATA[Beurteilungsverknüpfung]]></field-label>
<field-label lang="es_ES"><![CDATA[Asociación de evaluación]]></field-label>
<field-label lang="fr_FR"><![CDATA[Association d'évaluation]]></field-label>
<field-label lang="ja_JP"><![CDATA[評価関連付け]]></field-label>
<field-label lang="ko_KR"><![CDATA[평가 협회]]></field-label>
<field-label lang="pt_BR"><![CDATA[Associação de avaliação]]></field-label>
<field-label lang="ru_RU"><![CDATA[Ассоциирование оценки]]></field-label>
<field-label lang="zh_CN"><![CDATA[评估协会]]></field-label>
<field-description><![CDATA[Assessment association]]></field-description>
<field-description lang="de_DE"><![CDATA[Beurteilungsverknüpfung]]></field-description>
<field-description lang="es_ES"><![CDATA[Asociación de evaluación]]></field-description>
<field-description lang="fr_FR"><![CDATA[Association d'évaluation]]></field-description>
<field-description lang="ja_JP"><![CDATA[評価関連付け]]></field-description>
<field-description lang="ko_KR"><![CDATA[평가 협회]]></field-description>
<field-description lang="pt_BR"><![CDATA[Associação de avaliação]]></field-description>
<field-description lang="ru_RU"><![CDATA[Ассоциирование оценки]]></field-description>
<field-description lang="zh_CN"><![CDATA[评估协会]]></field-description>
</field-definition>
<field-definition id="bgiAccountId" type="picklist" required="false" custom="false">
<field-label><![CDATA[Account ID]]></field-label>
<field-description><![CDATA[Account ID]]></field-description>
<picklist-id>bgiAccounts</picklist-id>
</field-definition>
<field-definition id="packageId" type="picklist" required="false" custom="false">
<field-label><![CDATA[Package ID]]></field-label>
<field-description><![CDATA[Package ID]]></field-description>
<picklist-id>bgPackages</picklist-id>
</field-definition>
    
```

Replaced existing entry for fadvAccountPackage, replace all occurrences of
 <field refid="fadvAccountPackage"/> with
 <field refid="bgiAccountId"/>
 <field refid="packageId"/>

The following file is a copy of the above format.



SFPART015956-Standard Job Requisition_.xml



b) Proceed to upload the file:

up to Company Listing
 Promesa Enterprises 0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Others show all...

Add a new job requisition Template or Update an existing one

Template File: No file chosen

Job requisition Templates

ID	Type	Name
8	Job Requisition	Standard Job Requisition
601	Job Requisition	Simple Job Requisition
641	Job Requisition	US Job Requisition
661	Job Requisition	CAN Job Requisition

Job requisition Template was updated successfully
 Warnings occurred validating Recruiting Template:
 Warning: Custom filter filter1 has a picklist id mapped to it in the template. This will be ignored because picklists for custom filters are configured on the Internal and External Applicant Search Settings provisioning page.
 Warning: Custom filter filter2 has a picklist id mapped to it in the template. This will be ignored because picklists for custom filters are configured on the Internal and External Applicant Search Settings provisioning page.
 Warning: Custom filter filter3 has a picklist id mapped to it in the template. This will be ignored because picklists for custom filters are configured on the Internal and External Applicant Search Settings provisioning page.

Add a new job requisition Template or Update an existing one

Template File:

Job requisition Templates

ID	Type	Name	Active	Exp
8	Job Requisition	Standard Job Requisition	<input checked="" type="checkbox"/>	
601	Job Requisition	Simple Job Requisition	<input type="checkbox"/>	
641	Job Requisition	US Job Requisition	<input type="checkbox"/>	
661	Job Requisition	CAN Job Requisition	<input type="checkbox"/>	

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Update Candidate Profile Template, Add SSN and DOB fields on - Provisioning

The candidate profile template is de default form with fields that a candidate must fill to apply for a job, it's possible to add new fields too, the outbound integration will need the values of SSN and DOB, the attached XML contains the code to add these fields, follow the steps:

- 1- Go to Provisioning Site/ Edit Candidate Profile Template, copy the text to an editor



Candidateprofile_DOB_SSN.xml

```
Save Form
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE candidate-profile-data-model PUBLIC "-//SuccessFactors, Inc.//DTD
Candidate Profile Data Model//EN" "candidate-profile-data-model.dtd">
<candidate-profile-data-model>
  <template-name><![CDATA[NXGEN Candidate Profile Template]]></template-name>
  <template-name lang="de_DE"><![CDATA[NXGEN - Kandidatenprofilvorlage]]></template-
name>
  <template-name lang="es_ES"><![CDATA[Plantilla de perfil de candidato de NXGEN]]>
</template-name>
  <template-name lang="fr_FR"><![CDATA[Modèle de profil de candidat NXGEN]]>
</template-name>
  <template-name lang="ja_JP"><![CDATA[NXGEN 候補者の基本個人情報管理テンプレート]]>
</template-name>
  <template-name lang="ko_KR"><![CDATA[NXGEN 후보자 프로파일 템플릿]]></template-name>
  <template-name lang="pt_BR"><![CDATA[Modelo de perfil de candidato NXGEN]]>
</template-name>
  <template-name lang="ru_RU"><![CDATA[Шаблон профиля кандидата NXGEN]]></template-
name>
  <template-name lang="zh_CN"><![CDATA[NXGEN 候选人简档模板]]></template-name>
  <template-desc><![CDATA[Standard NXGEN Candidate Profile Template]]></template-
desc>
  <instruction-header>
    <label mime-type="text-html"><![CDATA[ <b>Dear Candidate,</b> <br><br>Thank you
for expressing your interest.<br><br>
We would like to know more about you so we can best find a job that fits you. Please
add more details about yourself to your profile page. Currently we search for
candidates in two ways: 1) by searching your resume and 2) by searching the fields
in your candidate profile. By completing the fields in your profile you increase
the chances that our recruiters find your information in a candidate search. Please
keep in mind that you can also adjust your visibility preferences on your profile.
<br><br> We will contact you if we find a position matching your personal interests
and abilities.
If you have applied to a specific opening, please be aware that the information you
provide here is available to the reviewers of your application.<br><br>Your
Recruiting Team<br>]]></label>
    <label mime-type="text-html" xml:lang="de_DE"><![CDATA[<b>Sehr geehrter Kandidat,
</b><br><br>Vielen Dank für Ihr Interesse.<br><br>
Wir würden gerne mehr über Sie erfahren, um eine für Sie passende Stelle
herauszufinden. Fügen Sie bitte Ihrer Profilseite weitere Einzelheiten über sich
hinzü. Derzeit verwenden wir zwei Methoden, um geeignete Kandidaten zu finden: 1)
]]></label>
  </instruction-header>
</candidate-profile-data-model>
</candidate-profile-data-model>
```



2- Add the field definition for SSN and DOB.

```
<field-definition id="dateOfBirth" type="date" required="false" custom="false" anonymize="false" sensitive="false">
<field-label mime-type="text-plain">![CDATA[Date Of Birth]]</field-label>
<field-label mime-type="text-plain" lang="de_DE">![CDATA[Date Of Birth]]</field-label>
<field-label mime-type="text-plain" lang="en_GB">![CDATA[Date Of Birth]]</field-label>
<field-label mime-type="text-plain" lang="en_US">![CDATA[Date Of Birth]]</field-label>
<field-label mime-type="text-plain" lang="es_ES">![CDATA[Date Of Birth]]</field-label>
<field-label mime-type="text-plain" lang="fr_FR">![CDATA[Date Of Birth]]</field-label>
<field-label mime-type="text-plain" lang="ja_JP">![CDATA[Date Of Birth]]</field-label>
<field-label mime-type="text-plain" lang="ko_KR">![CDATA[Date Of Birth]]</field-label>
<field-label mime-type="text-plain" lang="pt_BR">![CDATA[Date Of Birth]]</field-label>
<field-label mime-type="text-plain" lang="ru_RU">![CDATA[Date Of Birth]]</field-label>
<field-label mime-type="text-plain" lang="zh_CN">![CDATA[Date Of Birth]]</field-label>
<field-description>![CDATA[Date Of Birth]]</field-description>
<field-description lang="de_DE">![CDATA[Date Of Birth]]</field-description>
<field-description lang="en_GB">![CDATA[Date Of Birth]]</field-description>
<field-description lang="en_US">![CDATA[Date Of Birth]]</field-description>
<field-description lang="es_ES">![CDATA[Date Of Birth]]</field-description>
<field-description lang="fr_FR">![CDATA[Date Of Birth]]</field-description>
<field-description lang="ja_JP">![CDATA[Date Of Birth]]</field-description>
<field-description lang="ko_KR">![CDATA[Date Of Birth]]</field-description>
<field-description lang="pt_BR">![CDATA[Date Of Birth]]</field-description>
<field-description lang="ru_RU">![CDATA[Date Of Birth]]</field-description>
<field-description lang="zh_CN">![CDATA[Date Of Birth]]</field-description>
</field-definition>
<field-definition id="ssn" type="text" required="false" custom="false" anonymize="false" sensitive="false">
<field-label mime-type="text-plain">![CDATA[SSN]]</field-label>
<field-label mime-type="text-plain" lang="de_DE">![CDATA[SSN]]</field-label>
<field-label mime-type="text-plain" lang="en_GB">![CDATA[SSN]]</field-label>
<field-label mime-type="text-plain" lang="en_US">![CDATA[SSN]]</field-label>
<field-label mime-type="text-plain" lang="es_ES">![CDATA[SSN]]</field-label>
<field-label mime-type="text-plain" lang="fr_FR">![CDATA[SSN]]</field-label>
<field-label mime-type="text-plain" lang="ja_JP">![CDATA[SSN]]</field-label>
<field-label mime-type="text-plain" lang="ko_KR">![CDATA[SSN]]</field-label>
<field-label mime-type="text-plain" lang="pt_BR">![CDATA[SSN]]</field-label>
<field-label mime-type="text-plain" lang="ru_RU">![CDATA[SSN]]</field-label>
<field-label mime-type="text-plain" lang="zh_CN">![CDATA[SSN]]</field-label>
<field-description>![CDATA[SSN]]</field-description>
<field-description lang="de_DE">![CDATA[SSN]]</field-description>
<field-description lang="en_GB">![CDATA[SSN]]</field-description>
<field-description lang="en_US">![CDATA[SSN]]</field-description>
<field-description lang="es_ES">![CDATA[SSN]]</field-description>
<field-description lang="fr_FR">![CDATA[SSN]]</field-description>
<field-description lang="ja_JP">![CDATA[SSN]]</field-description>
<field-description lang="ko_KR">![CDATA[SSN]]</field-description>
<field-description lang="pt_BR">![CDATA[SSN]]</field-description>
<field-description lang="ru_RU">![CDATA[SSN]]</field-description>
<field-description lang="zh_CN">![CDATA[SSN]]</field-description>
</field-definition>
```

I



3- Update the text into provisioning and save, the fields will display as below

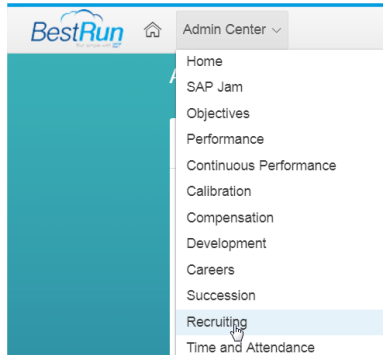
More Information	
Secondary Phone	<input type="text"/>
Country of Residence	United States ▼
Address line 1	Address1
Address line 2	Address2
City	Los Angeles
State	California ▼
Zip Code	9001
Date Of Birth	09/24/1987 <input type="text"/>
SSN	123456789

Update the Job requisition with the fields/values – Salesdemo

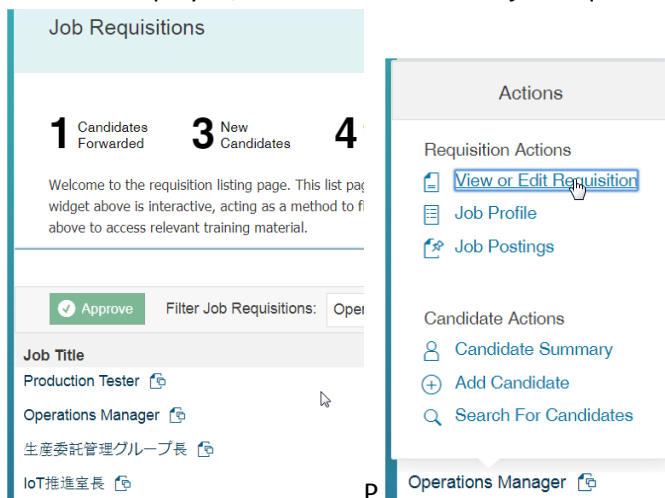
At this moment the fields for vendor, account, and package were added to the template; and the values were added on the picklists, but it's necessary to select the values on each job requisition.

To update the Job requisition with the fields/values updated on the pick list and in the job requisition template: follow the next steps:

- 1- Go to Admin Center and in the menu select Recruiting:



- 2- The list of job requisition will be listed as below, put the mouse over a job requisition and a menu will be displayed, click on view or edit a job requisition.





- 3- At the end of the page you will see the fields created previously; select the correct values (for vendor account and package), and save re job requisition.

Account	<input type="text" value="SFPART015956Promesa"/>
Package ID	<input type="text" value="Half Order"/> <input type="text" value="No Selection"/> <input type="text" value="Full Order"/> <input type="text" value="Half Order"/>

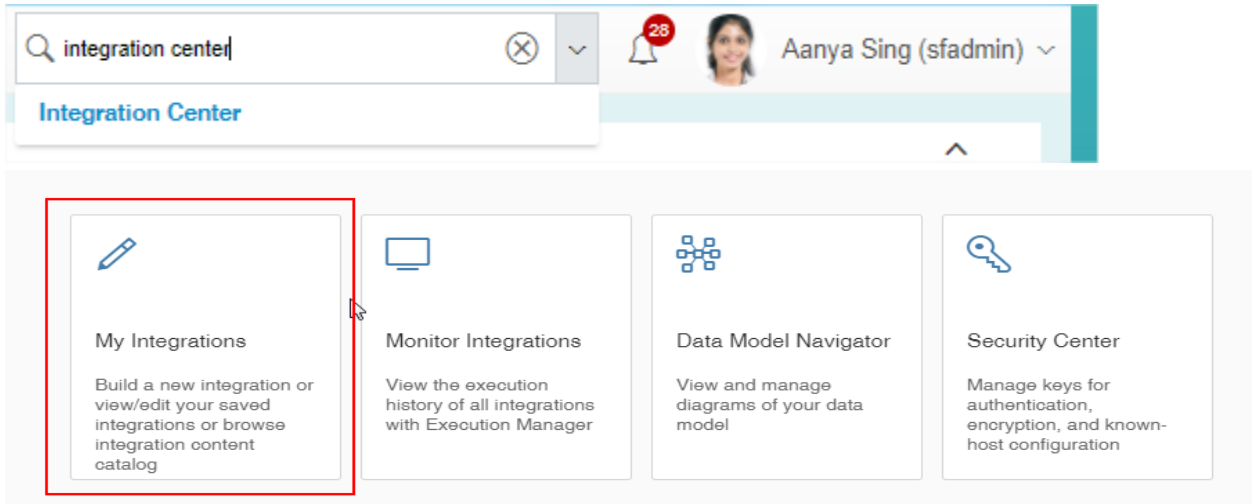


Set up Outbound Integration – Salesdemo

The outbound integration sends information to the vendor (PROMESA) for background check request, after the submission of the request, the order is received on the vendor side (PROMESA) the vendor sends a response and update the information on SAP Success Factors side, an example is the vendor order number created on the vendor side.

The steps to set this up are as follow

- 1) On the search field, type “integration center” and then click on “My Integrations”.





- 2) Proceed to create integration, click on “Create” then click “Import Integration Definition”.
 This following file contains the configuration of the integration (the .icd file is provided by the vendor)



JobApplicationBackgroundCheckRequest Scheduled REST Output_definition.icd

Name and Description	Last Modified	Last Run	Executions (Last 7 Days)
Background Check Sample Integration Template	Aug 08,2017 by stadmin		0 0 0
Carrier Eligibility Template The file to be produced is to provide employee demographic information to a carrier in order to establish benefits eligibility.	Jul 18,2017 by stadmin		0 0 0
EDI 834 Format - Benefit Carrier Integrations EDI 834 format Template	Mar 08,2017 by stadmin		0 0 0
EmpEmployment Scheduled REST Output	Jul 25,2017 by stadmin		0 0 0
Employment Details Export	Dec 02,2015 by stadmin		0 0 0
JobApplicationBackgroundCheckRequest Scheduled CSV File Export	Jul 20,2017 by stadmin		0 0 0

- 3) In the next form, the integration name and description are defined. Once defined, click next.

Integration Center - Create New Scheduled JSON REST Output Integration

Options | Configure Fields | Response Fields | Filter and Sort | Destination Settings | Scheduling | Review and Run

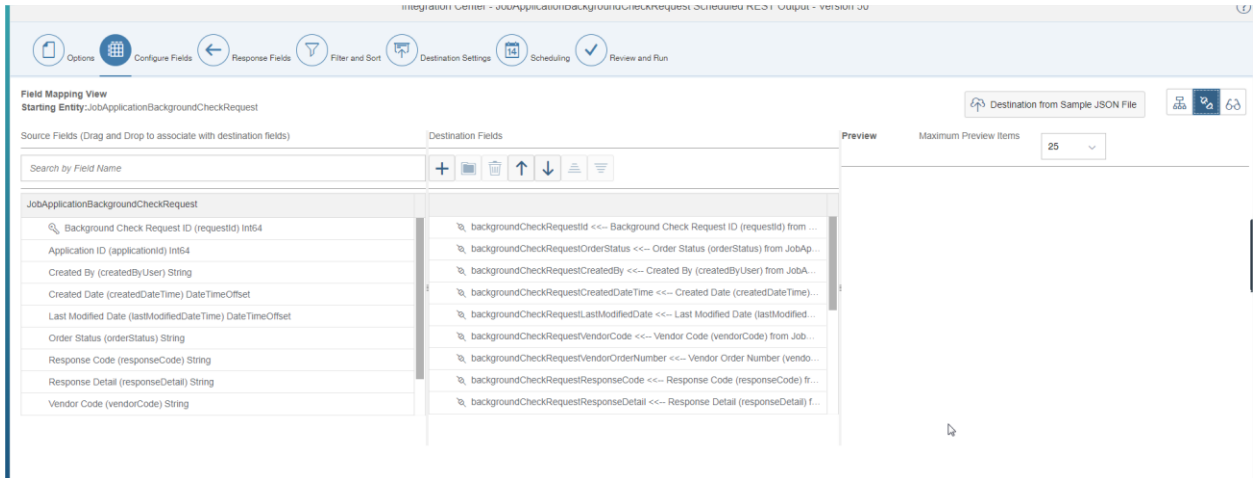
Integration Name:

Description:

Destination Page Size:



- 4) It will be required to configure the fields. Dragging and dropping from left to right all the information that will be sent to Promesa. Once done, click next.



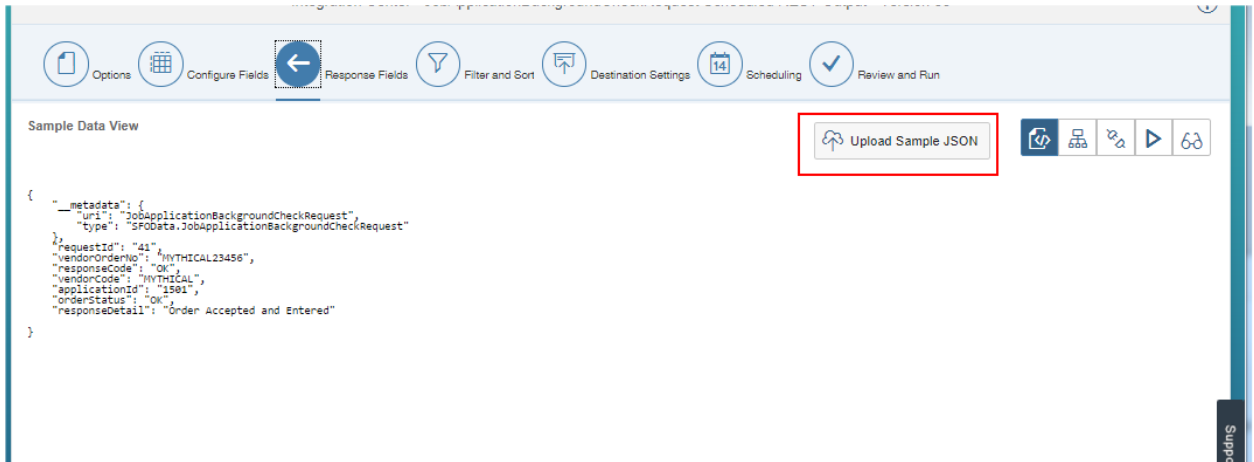
The Json file to send to the vendor integration looks as following:

```
{
  "backgroundCheckRequestId": 21,
  "backgroundCheckRequestOrderStatus": "OK",
  "backgroundCheckRequestCreatedBy": "sfadmin",
  "backgroundCheckRequestCreatedDateTime": "2017-08-01T16:41:09Z",
  "backgroundCheckRequestLastModifiedDate": "2017-08-01T16:41:09Z",
  "backgroundCheckRequestVendorCode": "SFPART015956Promesa",
  "backgroundCheckRequestVendorOrderNumber": "",
  "backgroundCheckRequestResponseCode": "",
  "backgroundCheckRequestResponseDetail": "",
  "primaryEmail": "carlos.elias@promesa.com",
  "PrimaryPhone": "50377307210",
  "jobApplicationId": 1621,
  "applicantFirstName": "Carlos",
  "applicantLastName": "Elias",
  "applicantMiddleName": "",
  "applicantDateOfBirth": "",
  "applicantssn": "",
  "bgiAccountId": "SFPART015956Promesa",
  "packageId": "Half Order"
}
```

- 5) For the update of the order and the acknowledgment status, the vendor (PROMESA) will provide a Json file with the fields that are needed, below is the sample of this file. Click next once uploaded.



JSON_Response.JSON

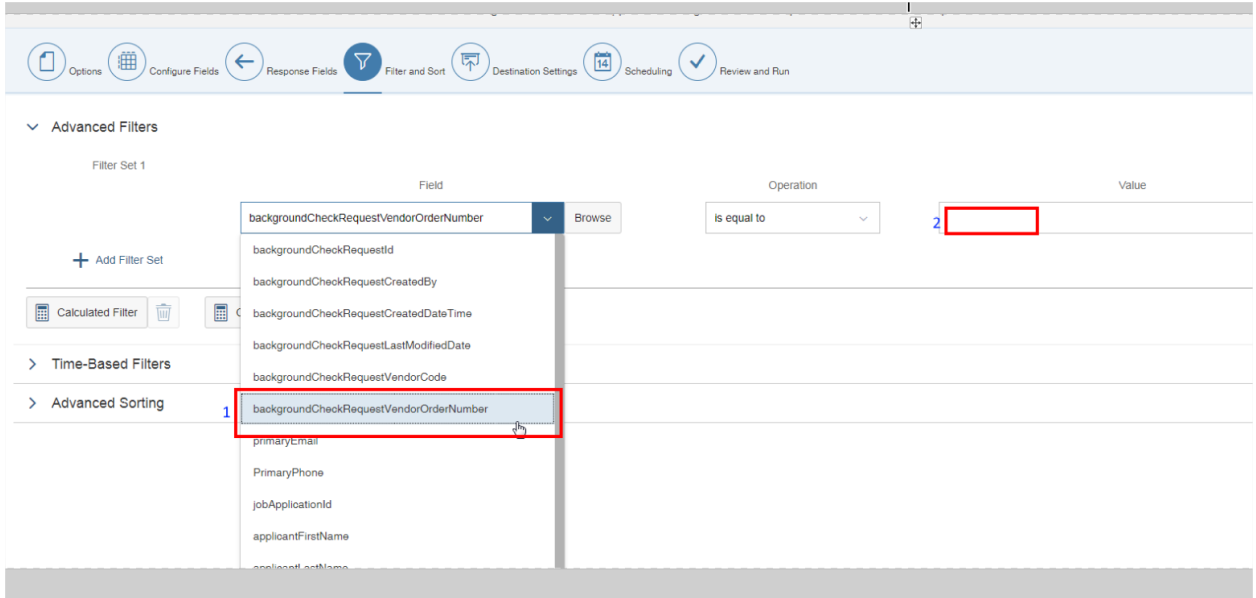


The screenshot shows a software interface with a navigation bar at the top containing icons for Options, Configure Fields, Response Fields (highlighted with a dashed box), Filter and Sort, Destination Settings, Scheduling, and Review and Run. Below the navigation bar is a 'Sample Data View' section. On the right side of this section, there is a button labeled 'Upload Sample JSON' which is highlighted with a red rectangular box. To the left of this button, a JSON file is displayed in a text area. The JSON content is as follows:

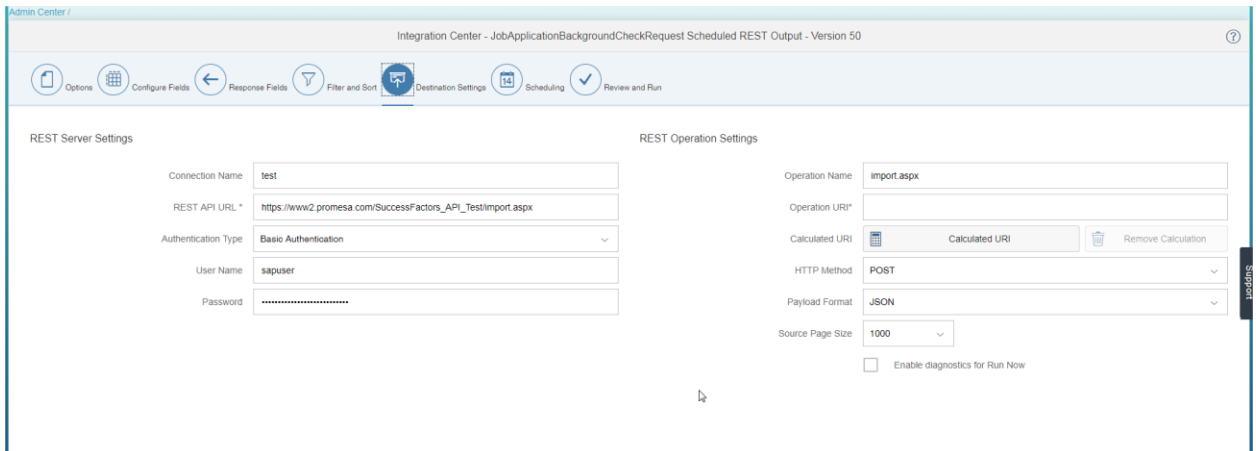
```
{
  "__metadata": {
    "uri": "JobApplicationBackgroundCheckRequest",
    "type": "SFOData.JobApplicationBackgroundCheckRequest"
  },
  "requestId": "41",
  "vendorOrderNo": "MYTHICAL23456",
  "responseCode": "OK",
  "vendorCode": "MYTHICAL",
  "applicationId": "1501",
  "orderStatus": "OK",
  "responseDetail": "Order Accepted and Entered"
}
```



- 6) Create a filter to manage the new background check:
One example of this is the filter “backgroundCheckRequestVendorOrderNumber” = null or empty



- 7) Set up destination settings (vendor inbound integration)





Set up the Rest URL (https://www2.promesa.com/SuccessFactors_API_Test/import.aspx), user and password and the method in this case is POST

Connection Name	<input type="text" value="test"/>
REST API URL *	<input type="text" value="https://www2.promesa.com/SuccessFactors_API_Test/import.aspx"/>
Authentication Type	<input type="text" value="Basic Authentication"/>
User Name	<input type="text" value="sapuser"/>
Password	<input type="password" value="....."/>

8) Optional: you can schedule a timer to trigger the integration. (Currently, the integration is being triggered automatically after the submission of a background check request)

Scheduled Version	
Occurs	<input type="text" value="Once"/>
Start Time	<input type="text" value="Jul 25 2017, 11:53 AM GMT-06:00"/>
Email To	<input type="text"/>



9) Review and run :

Options | Configure Fields | Response Fields | Filter and Sort | Destination Settings | Scheduling | **Review and Run**

Scheduled SuccessFactors → Query → Map → Validate → REST Server

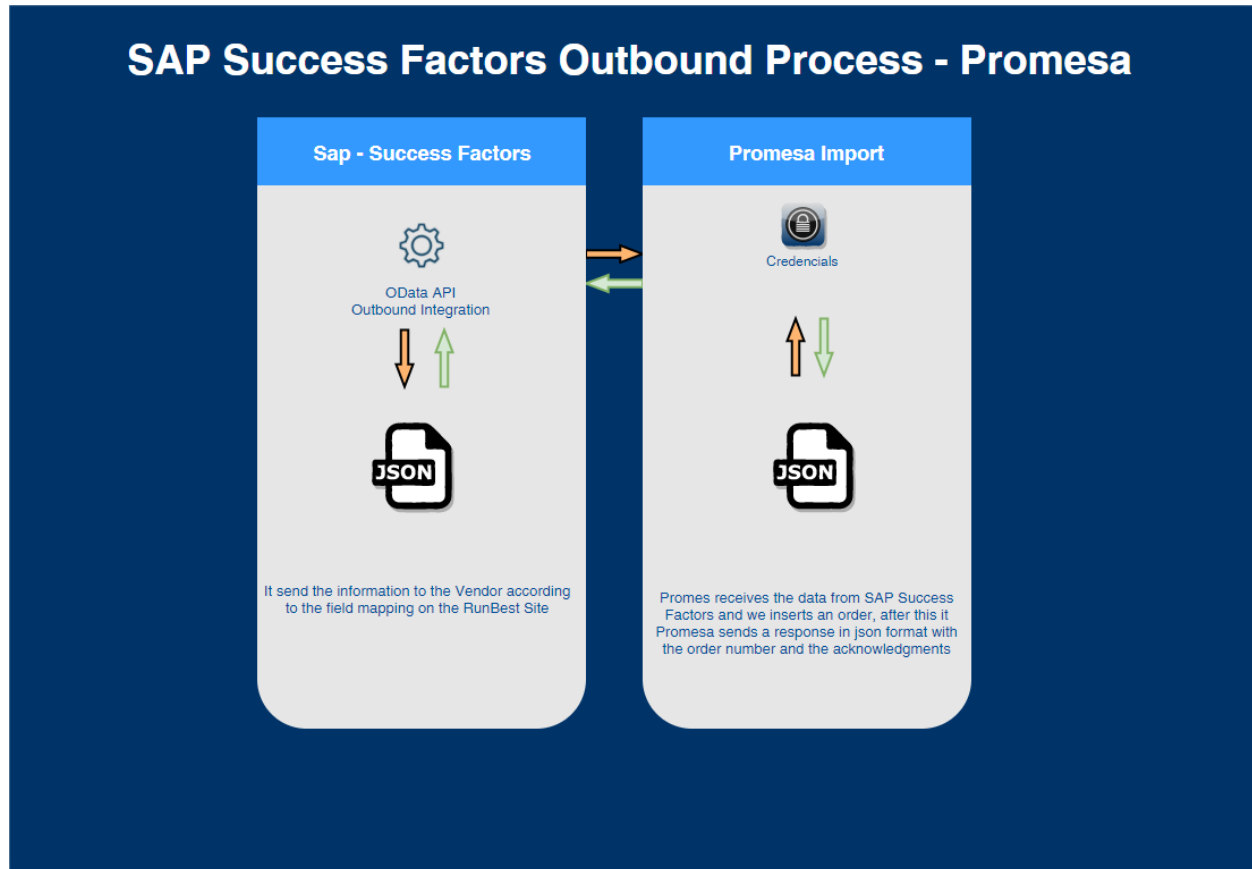
Starting Entity: EmpEmployment
 Number of Fields: 1
 Sorted By: No Sort Applied
 Filtered By: No Filter Applied
 Time Based Filter: No Time-Based Filter Applied
 Last Run Time: Mon Jul 24 2017 09:31:17 GMT-0600 (Central America Standard Time)

Integration Name: EmpEmployment Scheduled REST Output
 Scheduled Version: EmpEmployment Scheduled REST Output - Version 1
 Current Version: EmpEmployment Scheduled REST Output - Version 1
 Integration Format: JSON
 Delimiter Character: Not Applicable
 Header Type: NONE
 Host Address: :
 File Location:
 File Name:
 Execution Schedule Frequency: ONCE
 The integration scheduled to occur once on Tue Jul 25 2017 11:53:42 GMT-0600 (Central America Standard Time)

Data Fields

- 1.EmpEmploymentROWPersonIDExternal<<--personIDExternal
- 2.EmpEmploymentROWUserID<<--userid
- 3.EmpEmploymentROWCreatedDateTime<<--createdDateTime
- 4.EmpEmploymentROWAddressLine2<<--userNav/addressLine2
- 5.EmpEmploymentROWEmail<<--userNav/email

Outbound integration - General flow



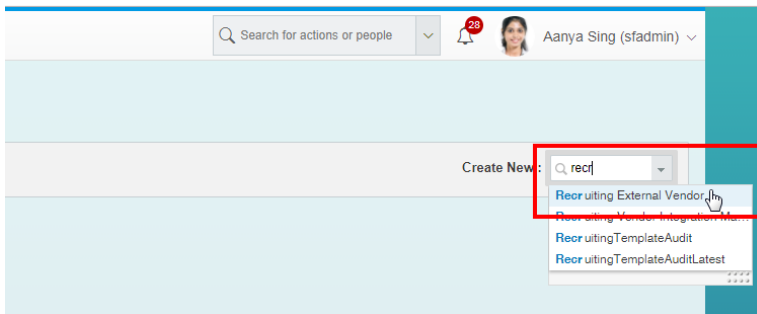
Create and map background check vendor – Salesdemo

On the site salesdemo4.successfactors.com it's necessary to create a Vendor to work with

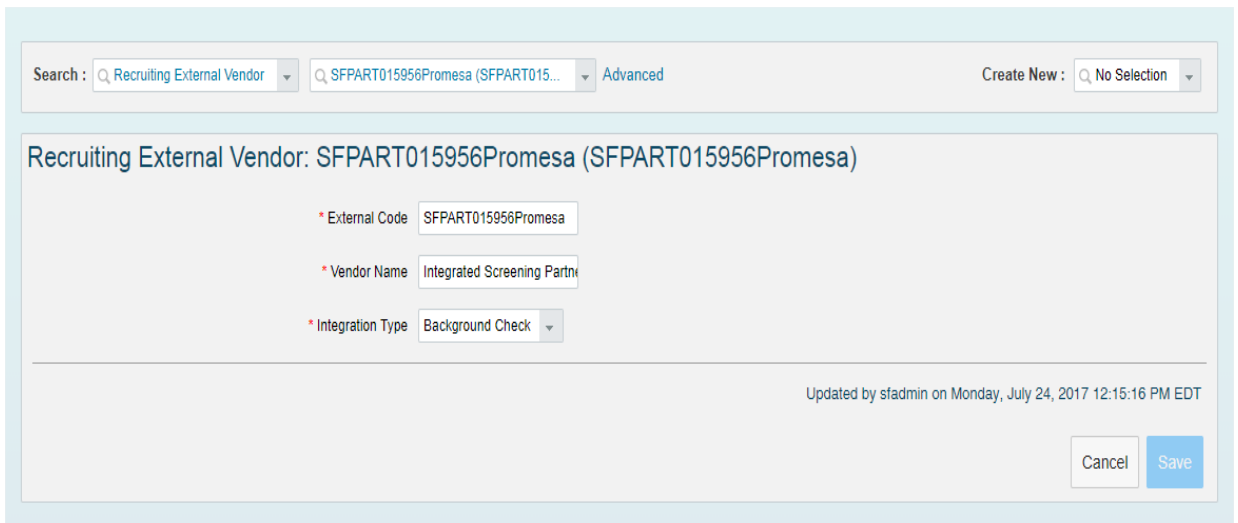
- 1- On the top search field type “Manage Data” and hit enter



- 2- Type in the Create New “Recruiting External Vendor”,



After, proceed to create a background check vendor, typing in the External Code, Vendor name and Integration Type. Click save.





- 3- Go once again to Create New and type “Recruiting Vendor Integration Mapping” and hit enter then create a new integration mapping, where we map the integration with the created vendor. On external code, type in the one created previously. On Vendor Name: select the name created previously, and on Integration Center Integration Name also select the one created previously.

A screenshot of a web application form titled "Recruiting Vendor Integration Mapping:". The form is contained within a light blue border. At the top, there is a search bar with the text "Recruiting Vendor Integration ..." and a "Create New" dropdown menu set to "No Selection". The form fields are as follows:

- * External Code: A text input field with the placeholder text "Click or focus to edit".
- * Vendor Name: A dropdown menu with "No Selection" selected and a search icon.
- * Integration Center Integration Name: A dropdown menu with "No Selection" selected and a search icon.
- * Default Integration: A dropdown menu with "No" selected.
- * Hours Before User Can Reinitiate: A text input field with the placeholder text "Click or focus to edit".

At the bottom right of the form, there are two buttons: "Cancel" and "Save".



Enabling the “Add Candidate” option - HCM Cloud Ops portal

The Candidate portal is the web interface that allow candidates to create a profile and apply for a job (the candidate adds the information), an extension of this web interface is used by the recruiter to create candidates, in this case the recruiter fills the information of the candidate. To enable the web interface follow this steps:

- 1- Log in to the HCM Cloud Ops portal with the login credentials for partner, and go to the URL <https://hcmcloudops.successfactors.com/Implementation/IRRequests>.
- 2- Under the “Additional BizX Requests” click on Sales/Training Instance Re-Index.

The screenshot shows the HCM Cloud Ops Service portal interface. The browser address bar displays the URL <https://hcmcloudops.successfactors.com/Implementation/IRRequests#>. The main content area is divided into several sections:

- BizX Provisioning Account Requests**
 - Restricted Access Request - Demo [Details](#)
Request a Provisioning Account in one or more Data center Demo Environments
 - Restricted Access Request - Preview & Production
This form is no longer required. A provisioning account in the specified data center environment will be created for you in the processing of a Customer Instance Access Request.
 - Terminate Access Request [Details](#)
Submit a request to deactivate provisioning access to all data centers/environments or to a specific customer instances(s)
 - Provisioning Account Password Reset
 - My Provisioning Accounts
- BizX Provisioning Account Mapping Requests**
 - Customer Instance Access Request [Details](#)
 - Demo Instance Access Request
- Additional BizX Requests**
 - BizX New Instance Request
This form is no longer used. BizX instances are automatically provisioned once the order is booked. For instance details please contact the customer.
 - [Request for SFTP Credentials](#)
 - [Sales/Training Instance Re-Index](#)
- ONB Requests**
 - Provision/Set up ONB Instance
This form is no longer used. ONB instances automatically provisioned once the order is booked. For instance details please contact the customer.
 - Invalidate/Delete ONB Instance
This form is no longer used. Instance decommissioning is processed only via the termination process. Please ask the customer to contact the SAP account team.
 - Request for SFTP Credentials
 - Request Full Account Copy
 - ONB Super Admin Access Request
 - Unlock/Reset Password for ONB Super Admin Account
- RMK Requests**
 - RMK Site Manager Assignment [Details](#)
 - RMK Password Reset



- 3- The below form will be displayed. Your CompanyID needs to be entered in the Company field and User Type will be "SAP Partner".

Demo/Training Instance Re-index Request ✕

Use this form to request a Sales/ Training instance be re-indexed. This should typically occur after an instance refresh.

Summary *	Sales/Training Instance Re-Index
First Name *	Alex
Last Name *	Gutierrez
Company *	SFPART015956
Email *	alejandrogutierrez@integratedscreening.com
Telephone	Loading...
User Type *	SAP Partner ▼
Notes	

Provide any additional information about this request, as needed.

NOTE: Confirmation of request upon submission will be sent to the email address entered on this form.

- 4- Once you submit the request, it will take around 2 business days to process. You can view it under "Requests". Once the request is processed, you will receive an email on the email id mentioned in the above form.

- Close Requests Status

Search Reset

Click [🔗](#) to View Details, Add/View Comments or Attachments.

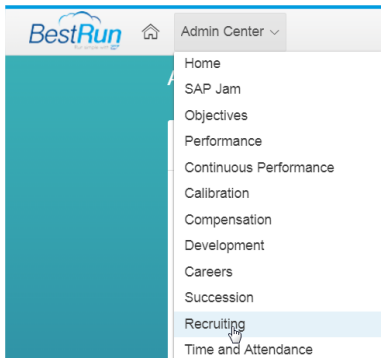
Key	Summary	Status	Resolution	Created	Updated
🔗 PARTNEROPS-34921	Sales/Training Instance Re-Index	Open	Unresolved	31-Jul-2017	31-Jul-2017
🔗 PARTNEROPS-34899	Sales/Training Instance Re-Index	Verified	Fixed	31-Jul-2017	31-Jul-2017

Go to page: Show rows: 1-2 of 2

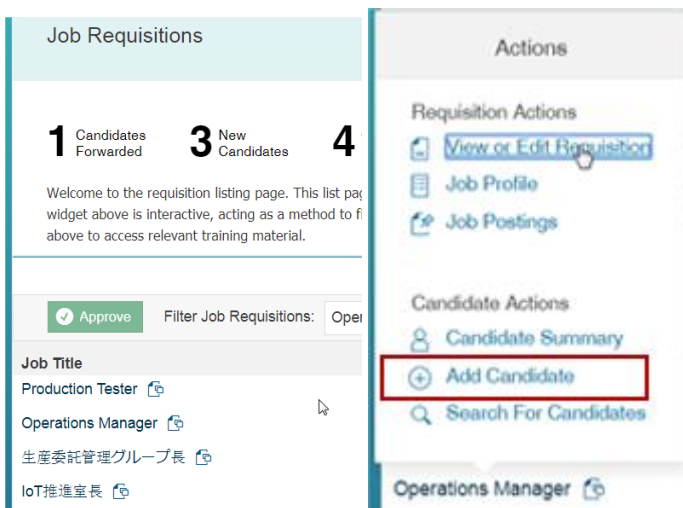


Create a Candidate – Salesdemo

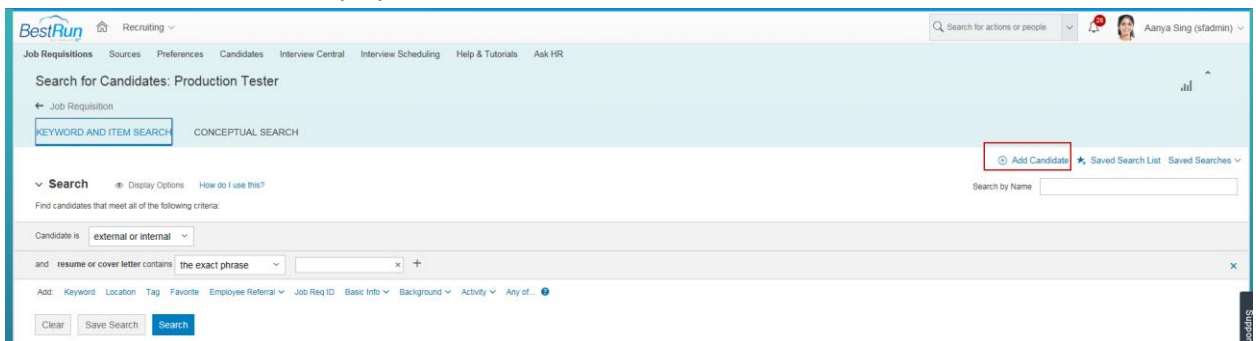
- 1- Once the request under #6 is processed successfully by Success Factors, you can go to the Admin Center and select “Recruiting”.



- 2- Hover your mouse over any of the Job Requisitions and you will get the below menu. Click “Add Candidate”.



- 3- The below screen will be displayed. Click on “Add Candidate” over here.





4- The below screen will be displayed. Fill the candidate information in it and click “Create Profile”.

Add Candidate ✕

via email that they can log in to the web site to update their profile, and to search and apply for jobs.

Enter the name and email address for the candidate you wish to add. All fields are required.

First Name:

Last Name:

Email:

Retype Email Address:

Phone:

Country:

Close Create Profile



5. You will be asked to upload a word document containing the resume of the candidate. Select the resume using “Browse” and then click on “Upload”.

Rahul (

Save Cancel Close Window

Upload Resume

file.
Resume
on file.
Cover Letter

First N
Middle
Last N
Title:
Country
Phone
Email:

Choose File: Browse...

Cancel Upload

Internal Employment History + Add Documents

There are no items in this section. Additional Document 1: Attach a document



- It will read the necessary information from the word file and display it on the below screen. You can make the necessary additions/changes. Click save.

Save Cancel Close Window

Integrated Screening Partners

Integrated Screening Partners's Resume

Last Updated: 09/02/2017

Your Cover Letter is not on file.

[Click here to attach your Cover Letter](#)

Changes pending. You must save your changes in order to keep them.

First Name:

Middle Name:

Last Name:

Title:

Country/Region:

Phone: Send me SMS notifications

Email:

Internal Employment History + Add

There are no items in this section.

Previous Employment + Add Another

No Selection
 Integrated Screening Partners A ProMesa Inc. Company
XDetails

Formal Education + Add Another

No Selection
XDetails

Language Skills + Add

There are no items in this section.

Certifications/Licenses + Add

There are no items in this section.

Candidate Talent Pool + Add

There are no items in this section.

Corporate Talent Pool + Add

There are no items in this section.

Documents

Additional Document 1: [Attach a document](#)

Additional Document 2: [Attach a document](#)

More information

Secondary Phone:

Country of Residence:

Address line 1:

Address line 2:

City:

State:

Zip Code:

External candidate email address:



Apply to a job – Salesdemo

- 1- Click on the information under Candidates column for the job to which you need to apply.

Job Title	Req Id ↑	Hiring Manager	Candidates
Production Tester	901	Jimi MacCalin	12
Operations Manager	941	Mya Cooper	5
生産委託管理グループ長	961	敦 桑原	10 (2 New)
IoT推進室長	964	敦 桑原	5 (1 New)
Project Manager 1	1021	Jada Baker	-

- 2- Move the mouse over the Job Title, and click on candidate summary:

Job Title	Req Id ↑	Hiring Manager	Candidates
Production Tester	901	Jimi MacCalin	12
	941	Mya Cooper	5
	961	敦 桑原	10 (2 New)
	964	敦 桑原	5 (1 New)
	1021	Jada Baker	-

Actions

Requisition Actions

- [View or Edit Requisition](#)
- [Job Profile](#)
- [Job Postings](#)

Candidate Actions

- [Candidate Summary](#)
- [Add Candidate](#)
- [Search For Candidates](#)

- 3- On the following page, click on “Forwarded” to review the list of new possible candidates.

▼ Talent Pipeline [View active candidates \(12\)](#) [View all candidates \(12\)](#)

1	0	0	0	0	0	0	10	0	0
Forwarded	Invited To Apply	New Application	Phone Screen	Short List	Interview	Background Check	Assessments	Offer	

[View candidates in "Forwarded" status](#)

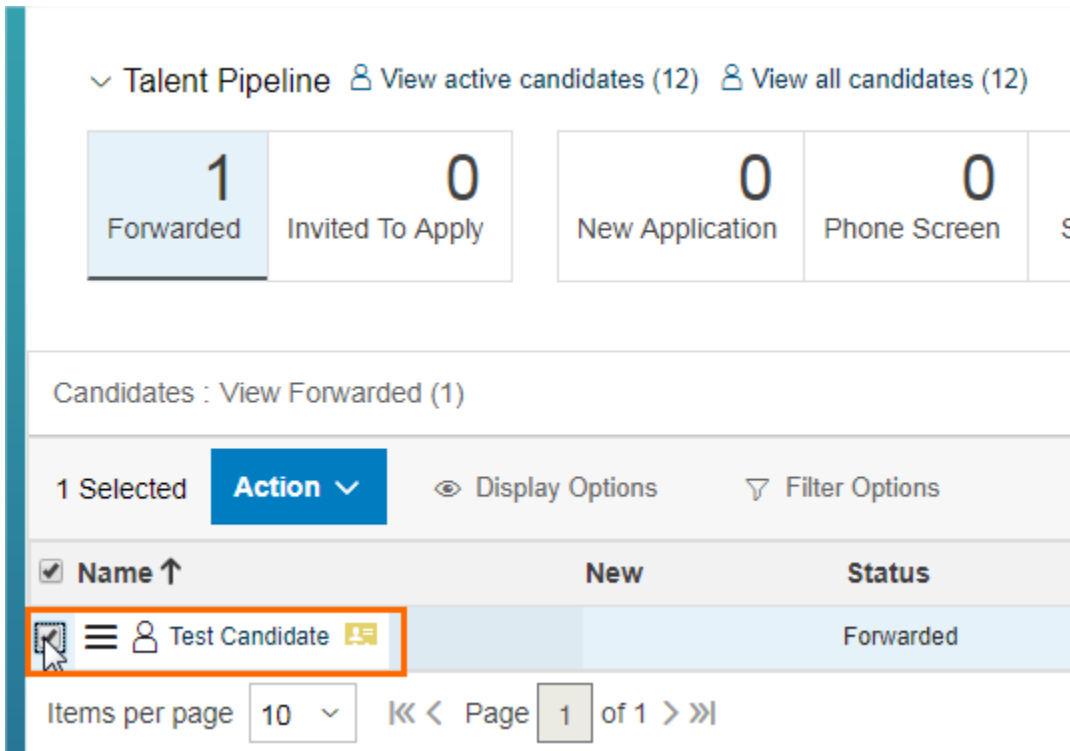
Candidates : View Forwarded (1)

0 Selected [Action](#) [Display Options](#) [Filter Options](#)

Name ↑	New	Status	Forwarded By	Candidate Type	Rating
Test Candidate		Forwarded	Aanya Sing	External	N/A

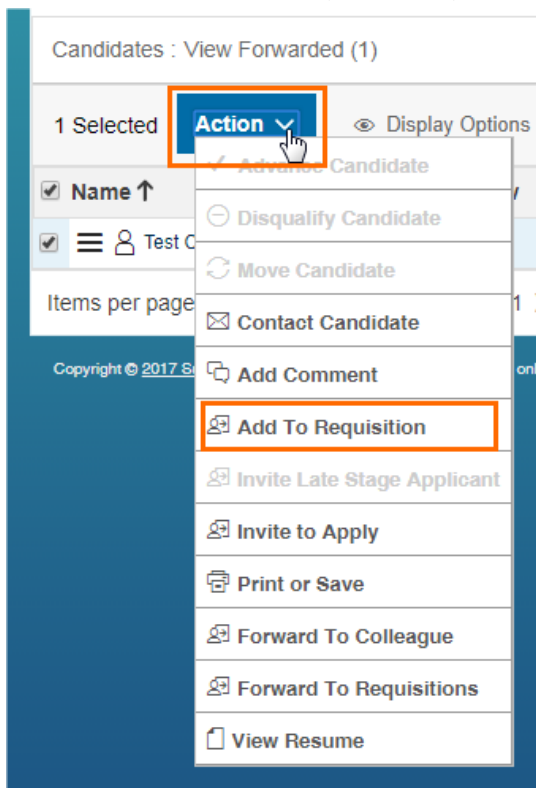
Items per page 10 [Page 1 of 1](#)

4- When the page has been loaded, select the candidate clicking on the checkbox.



The screenshot shows a 'Talent Pipeline' dashboard. At the top, there are links for 'View active candidates (12)' and 'View all candidates (12)'. Below this are several summary cards: 'Forwarded' (1), 'Invited To Apply' (0), 'New Application' (0), 'Phone Screen' (0), and 'S' (0). A section titled 'Candidates : View Forwarded (1)' contains a table with one candidate. The candidate's name is 'Test Candidate' and their status is 'Forwarded'. The 'Action' button for this candidate is highlighted with a blue box. Below the table, there are pagination controls showing 'Items per page' set to 10, and 'Page 1 of 1'.

5- Click on the Action button (blue color) and on the menu, click on "Add to Requisition"



This screenshot shows the 'Action' menu for the 'Test Candidate'. The 'Action' button is highlighted with a blue box. The menu options are: 'Add to Requisition' (highlighted with a blue box), 'Invite Late Stage Applicant', 'Invite to Apply', 'Print or Save', 'Forward To Colleague', 'Forward To Requisitions', and 'View Resume'. The 'Add to Requisition' option is the one to be selected according to the instructions.



6- Confirm the action clicking on Add To Requisition

The screenshot shows a dialog box titled "Add To Requisition" with a close button (X) in the top right corner. Inside the dialog, there is a section labeled "Candidates" which contains a table with one row:

Candidates	
Test Candidate	Please verify selected candidate(s).

At the bottom of the dialog, there are two buttons: "Cancel" and "Add To Requisition".

7- You will get a confirmation message:

The screenshot shows the same "Add To Requisition" dialog box, but now it displays a confirmation message: "1 candidate(s) successfully added to requisition". The "Add To Requisition" button is no longer visible, and an "OK" button has appeared in the bottom right corner.