Integrated Screening Partners
A ProMesa Inc. Company
Website: www.IntegratedScreening.com

SAP Success Factors

Client Settings

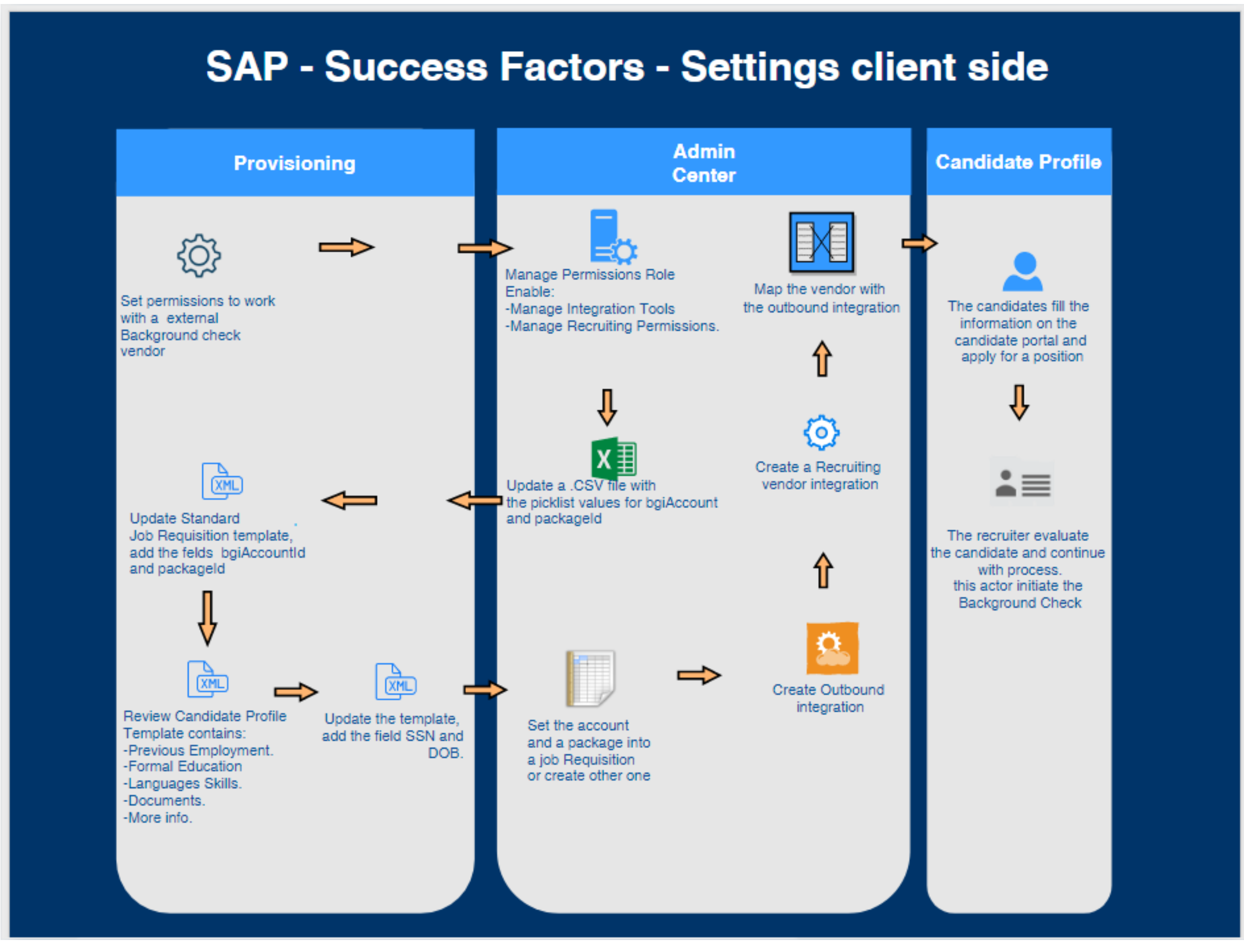
Contents

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.

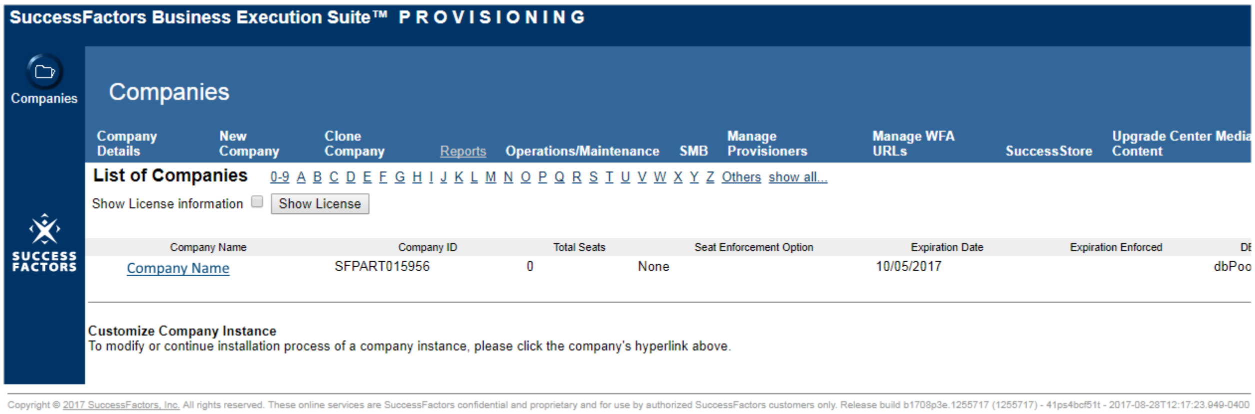
Steps



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

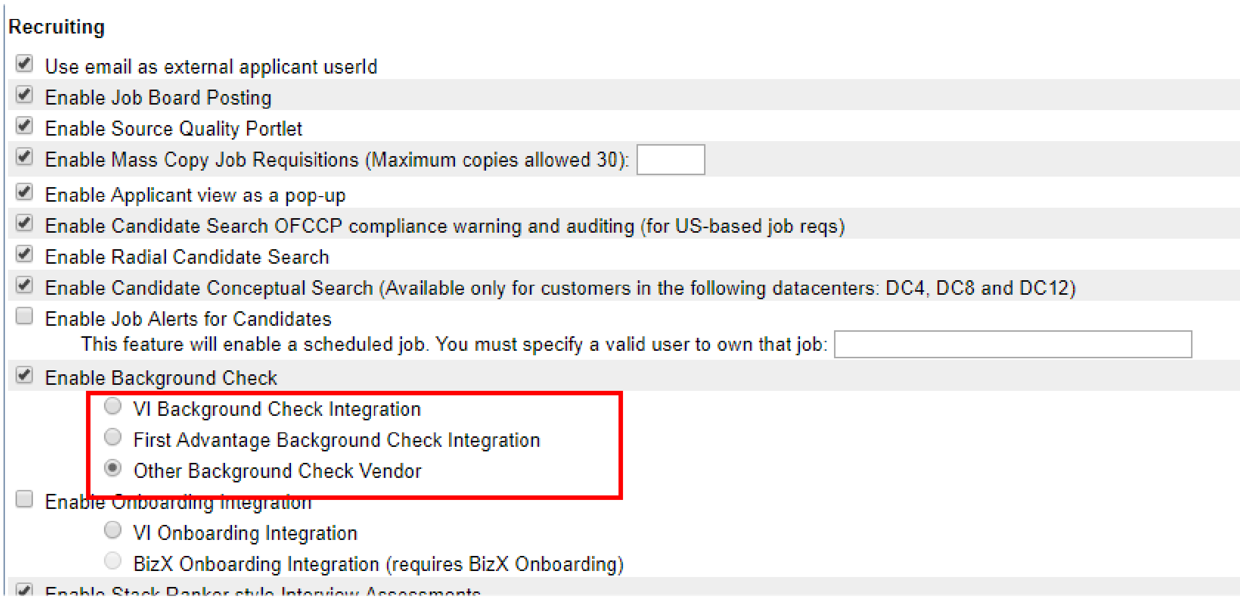
1) It is necessary to allow the execution of the background check using an external vendor, to proceed, access to our provisioning account and select our company:

2) This is the main page on the provisioning website, choose the company name :



3) Search the section "Edit Company Settings" and click on the item "Company Settings"

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


Recruiting

- [x] Use email as external applicant userId
- [x] Enable Job Board Posting
- [x] Enable Source Quality Portlet
- [x] Enable Mass Copy Job Requisitions (Maximum copies allowed 30):
- [x] Enable Applicant view as a pop-up
- [x] Enable Candidate Search OFCCP compliance warning and auditing (for US-based job reqs)
- [x] Enable Radial Candidate Search
- [x] 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:
- [x] 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)

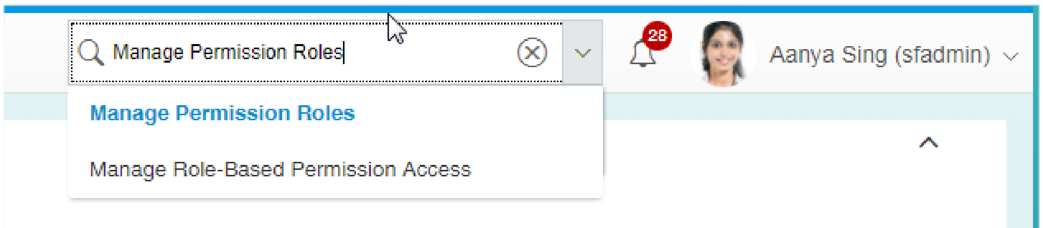
With these steps we enable to work with another vendor, besides the default that is selected.

Manage Permissions Role - Check Correct Permission – Salesdemo

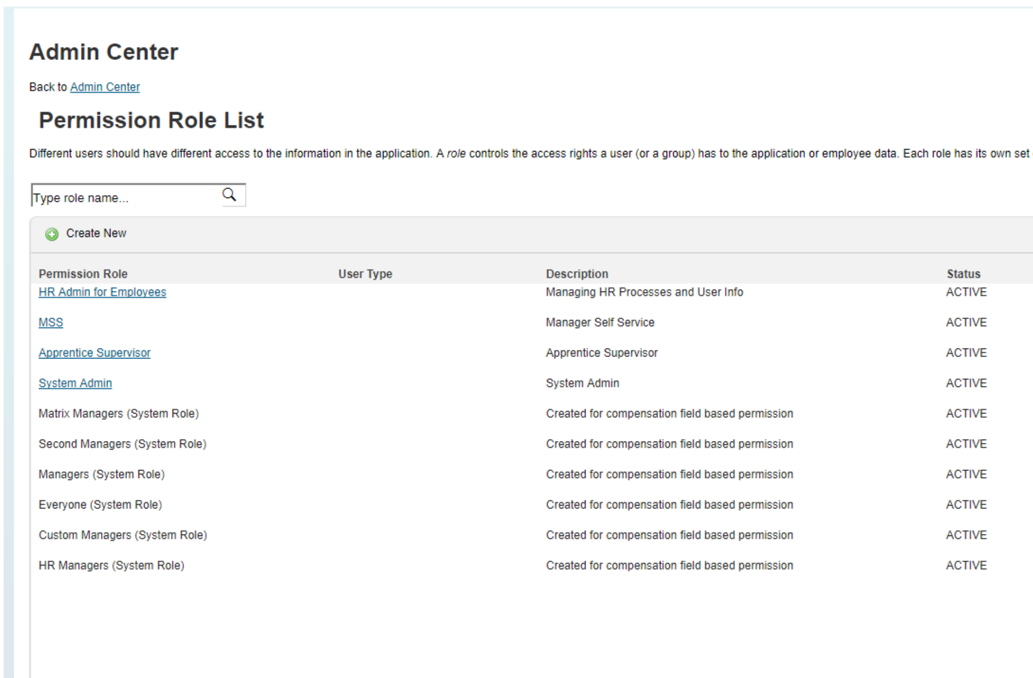
Assigning the correct permissions will allow us to perform some tasks such as creating Job requisitions, start background check, read information through OData API, etc., it's necessary to check the permissions for the users, and in the next lines check how to enable some of the basic permissions.

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

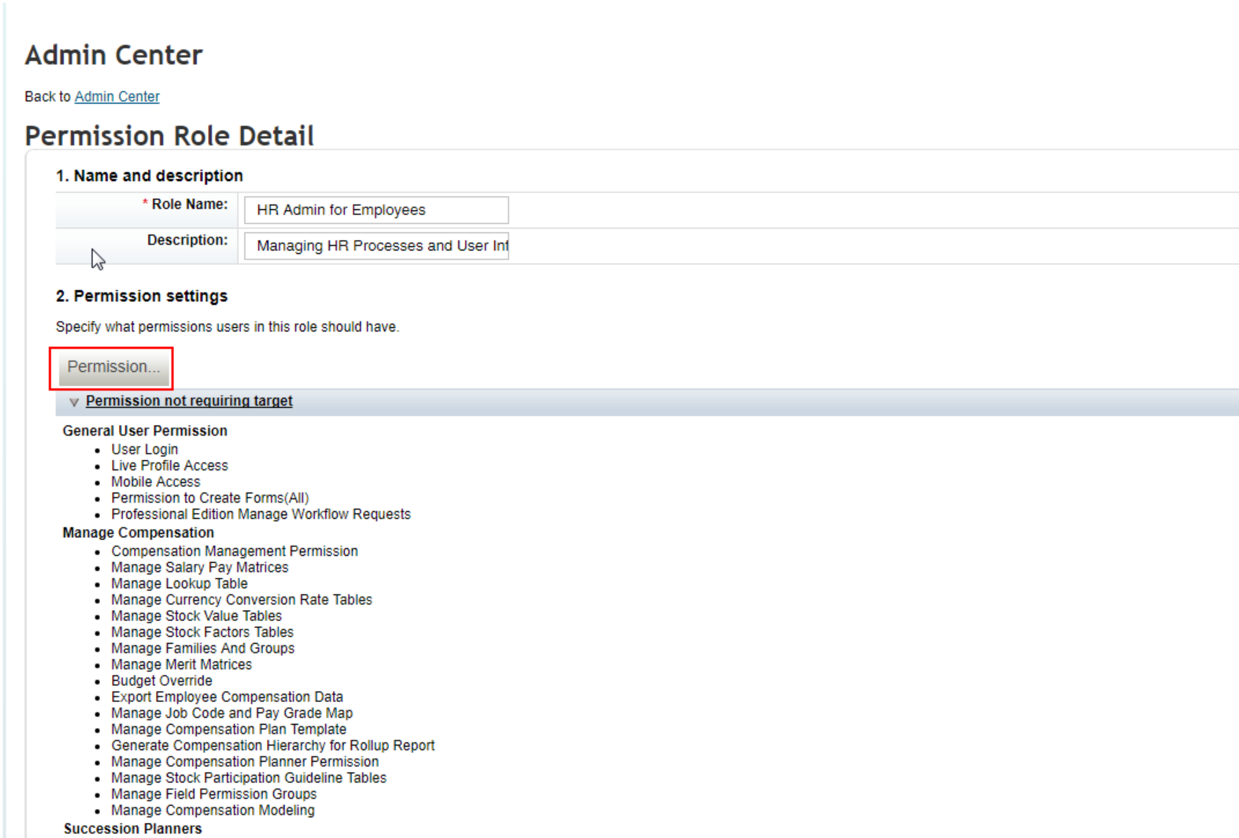
1) On the search box type "Manage Permission Roles" and hit enter.



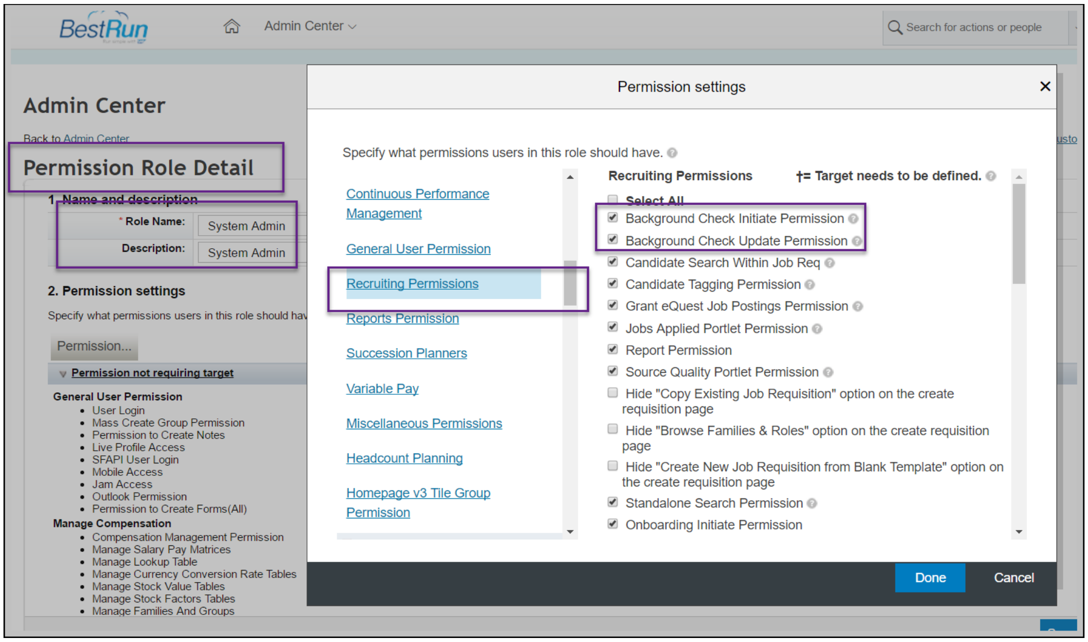
2) This option will display the list of roles, click on the correct role, in this case we will use the Role "HR Admin for Employees":



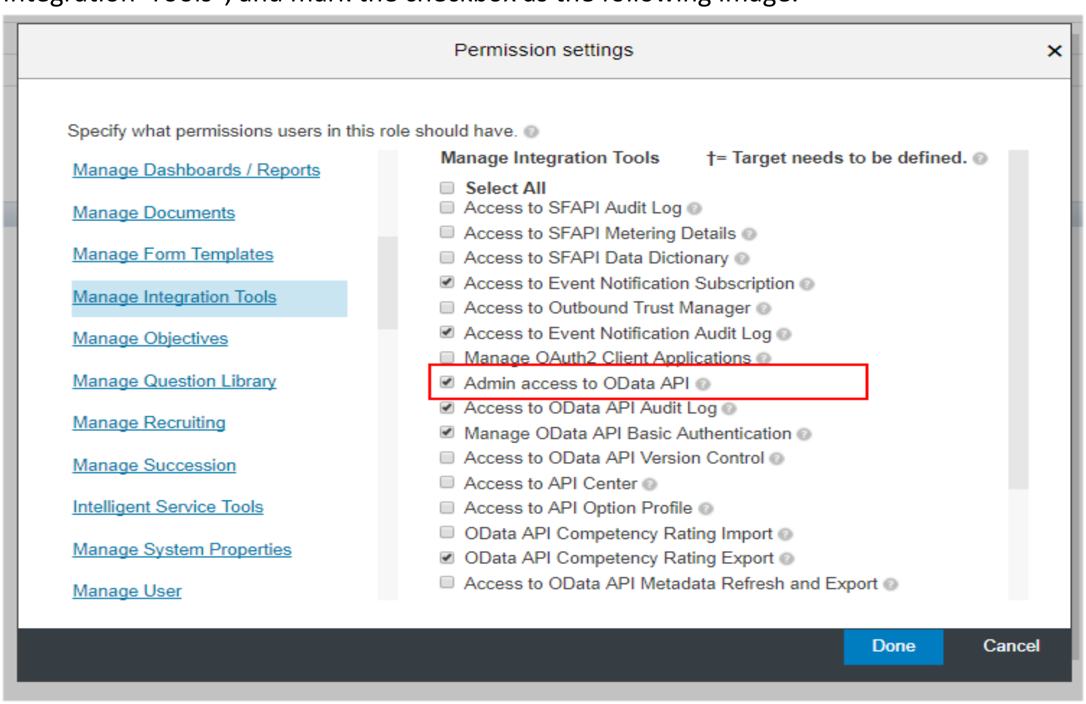
3) After you click the role, you will see the list of permissions already enabled for this role, click on the "Permission" button:



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:



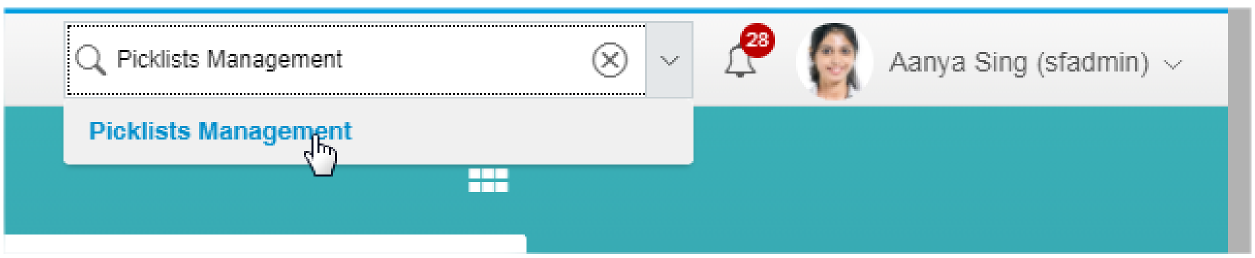
Update the picklists files provided by the vendor – Salesdemo

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):

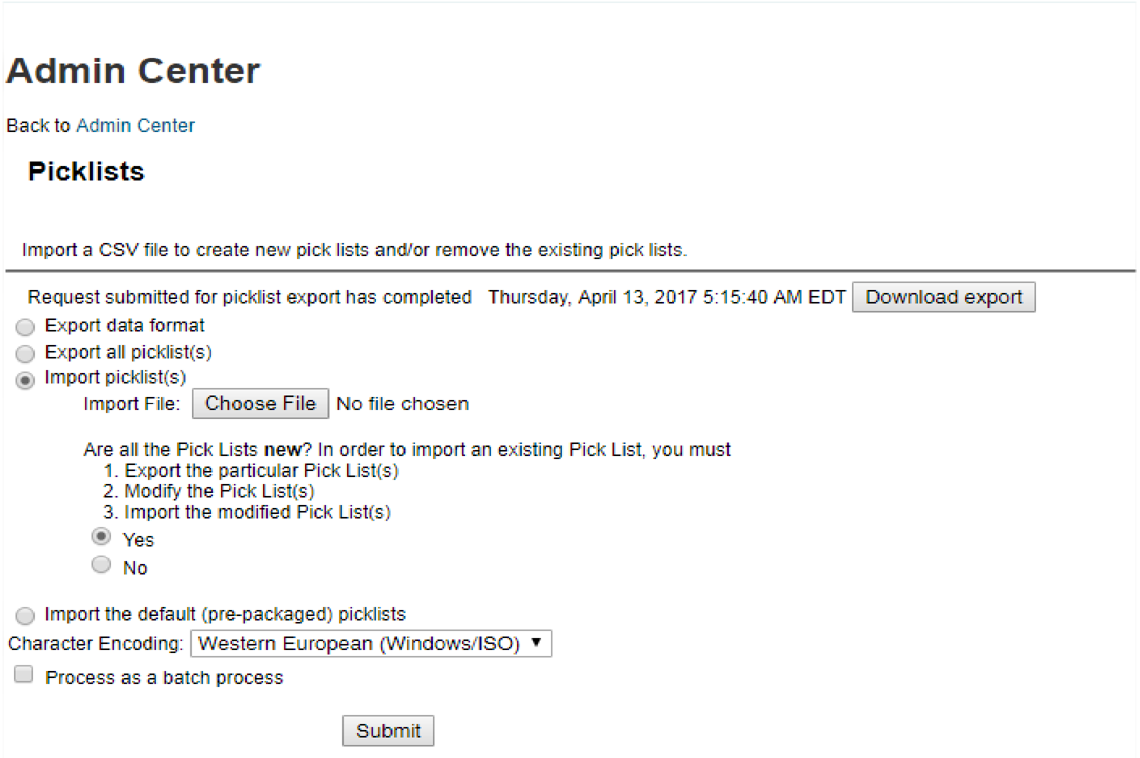
New_Picklists.csv

^picklistId	OptionId	minValue	maxValue	value	status	external_cc	parentOpti	en_US	zh_CN
bgiAccountId		-1	-1	-1	ACTIVE	1	-1	Account 1	Account 1
packageId		-1	-1	-1	ACTIVE	1	-1	Full Order	Full Order
packageId		-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"

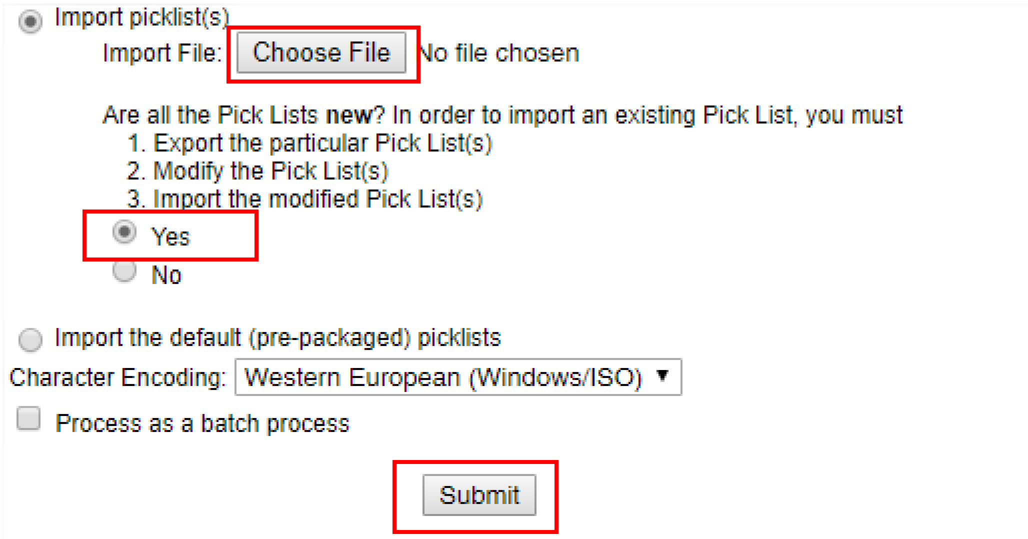


2) On the “Picklists Management“ form, you will see the following option:



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.

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

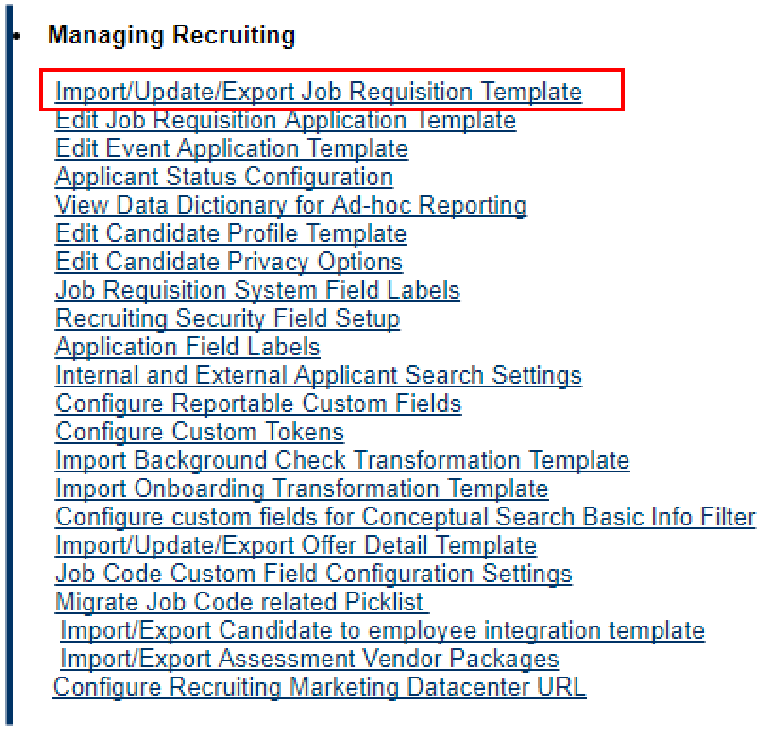


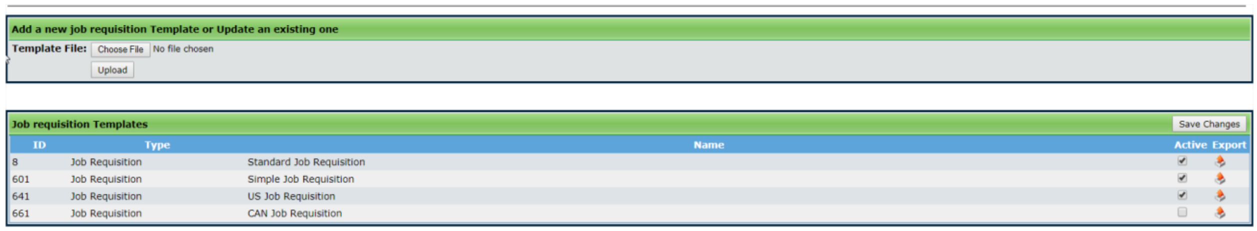
5) Click on the button “Submit” and the picklists file will be updated.

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"





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:

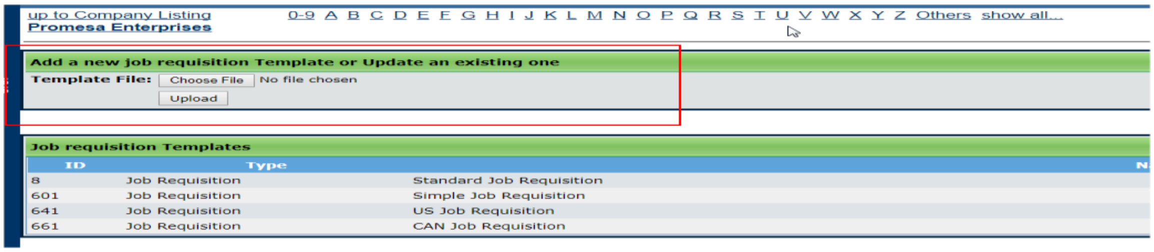
```xml
<field-definition id="assessment" type="derived" required="false" custom="false">
<field-label><![CDATA[Assessment association]]></field-label>
<field-label lang="de_DE"><![CDATA[Beurteilungsverknüpfung]]></field-label>
<field-label lang="es_ES"><![CDATA[Asociación de evaluación]]></field-label>
<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 assciation]]]></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>bgAccounts</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>
```

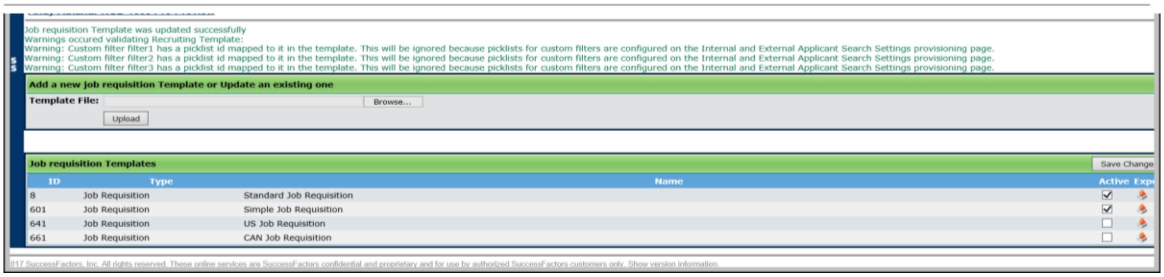
Replaced existing entry for fadvAccountPackage, replace all occurrences of
<field refid="fadvAccountPackage"/> with
<field refid="bgiAccountId"/>
<field refid="packageId"/>

The following file is a copy of the above format.

SFPART015956-Standard Job Requisition_.xml

b) Proceed to upload the file:



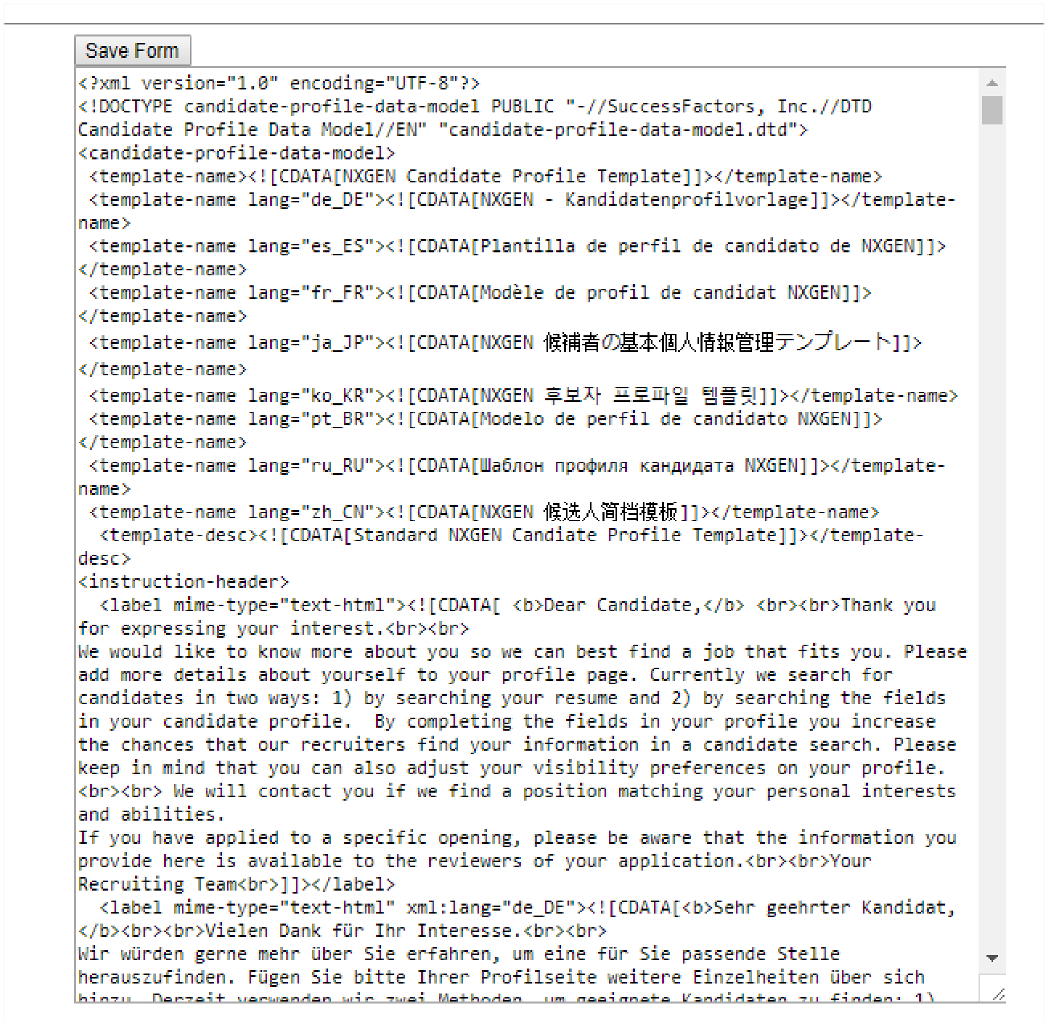


Update Candidate Profile Template, Add SSN and DOB fields on - Provisioning

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



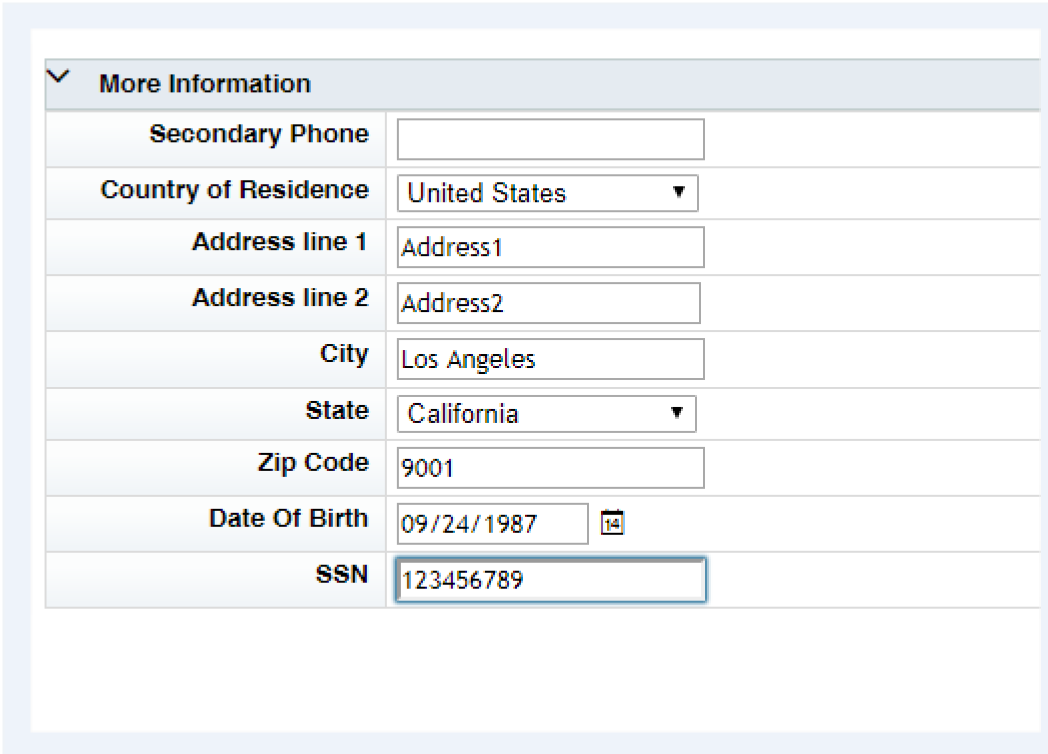
Save Form


```
<?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 Candiate 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
hinzu. Derzeit verwenden wir zwei Methoden, um geeignete Kandidaten zu finden: 1)
```

2- Add the field definition for SSN and DOB.

```xml
<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>
```

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



More Information

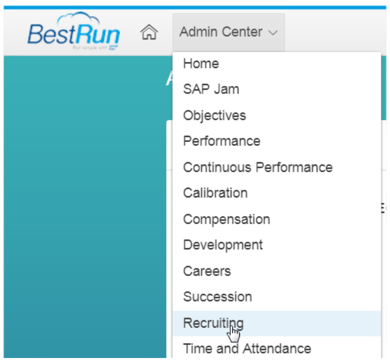
Secondary Phone	
Country of Residence	United States
Address line 1	Address1
Address line 2	Address2
City	Los Angeles
State	California
Zip Code	9001
Date Of Birth	09/24/1987
SSN	123456789

Update the Job requisition with the fields/values – Salesdemo

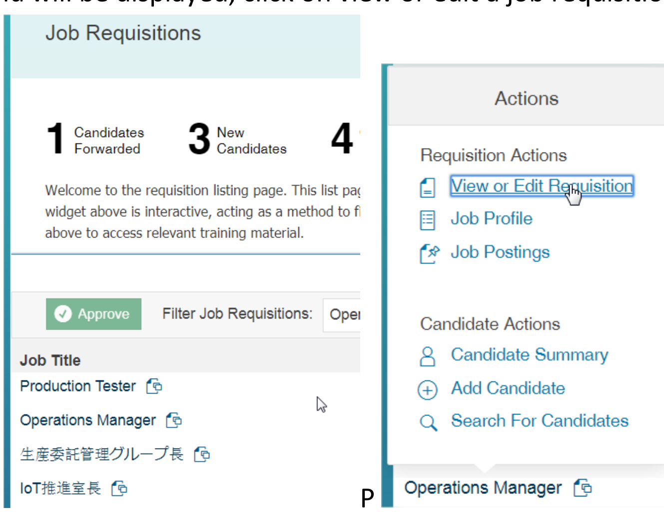
At this moment the fields for vendor, account, and package were added to the template; and the values were added on the picklists, but it's necessary to select the values on each job requisition.

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

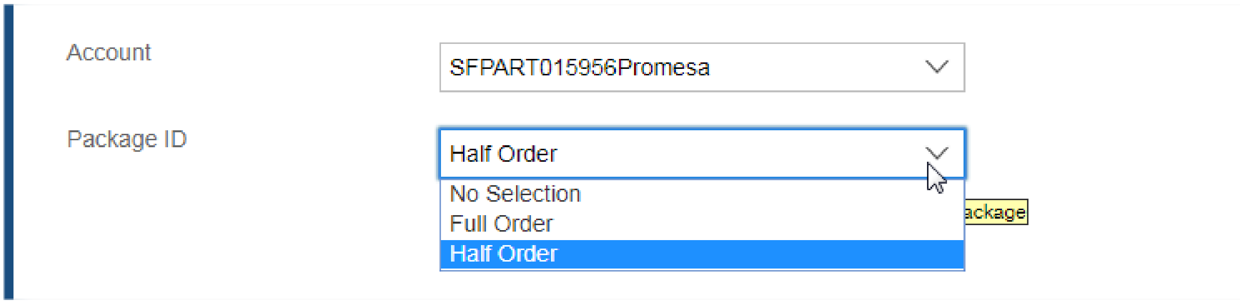
1- Go to Admin Center and in the menu select Recruiting:



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.

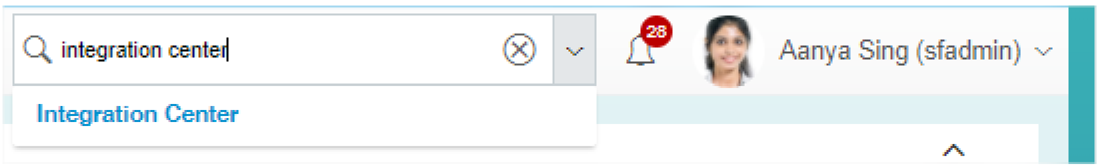


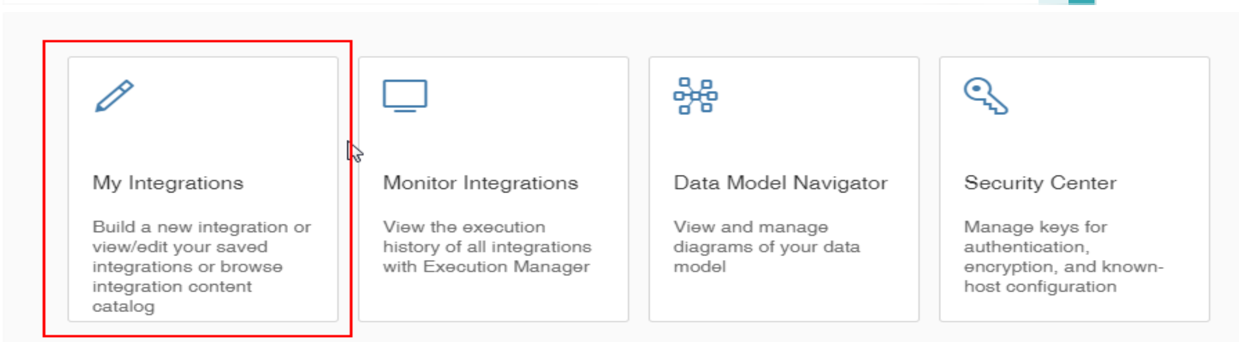
Set up Outbound Integration – Salesdemo

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

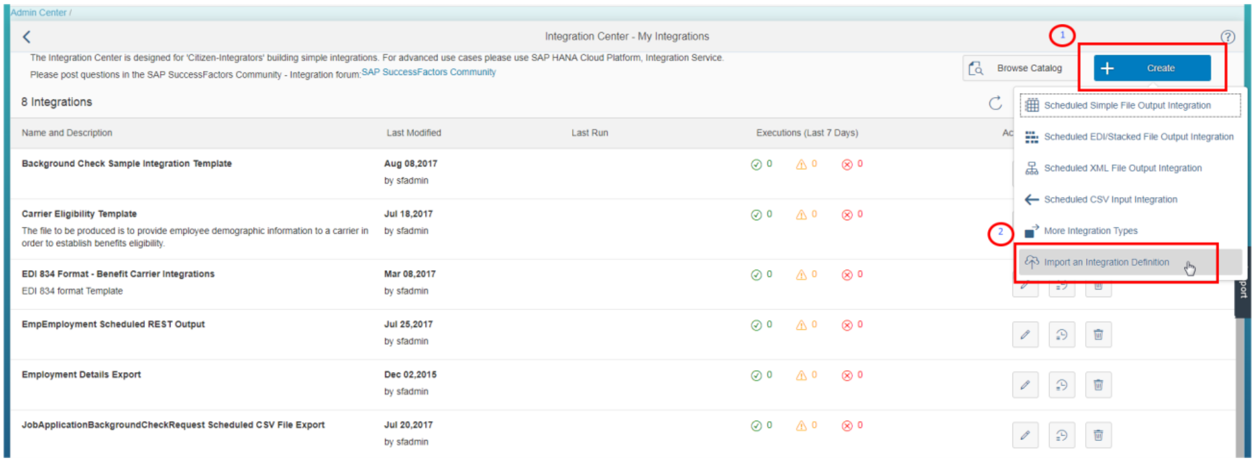
1) On the search field, type "integration center" and then click on "My Integrations".



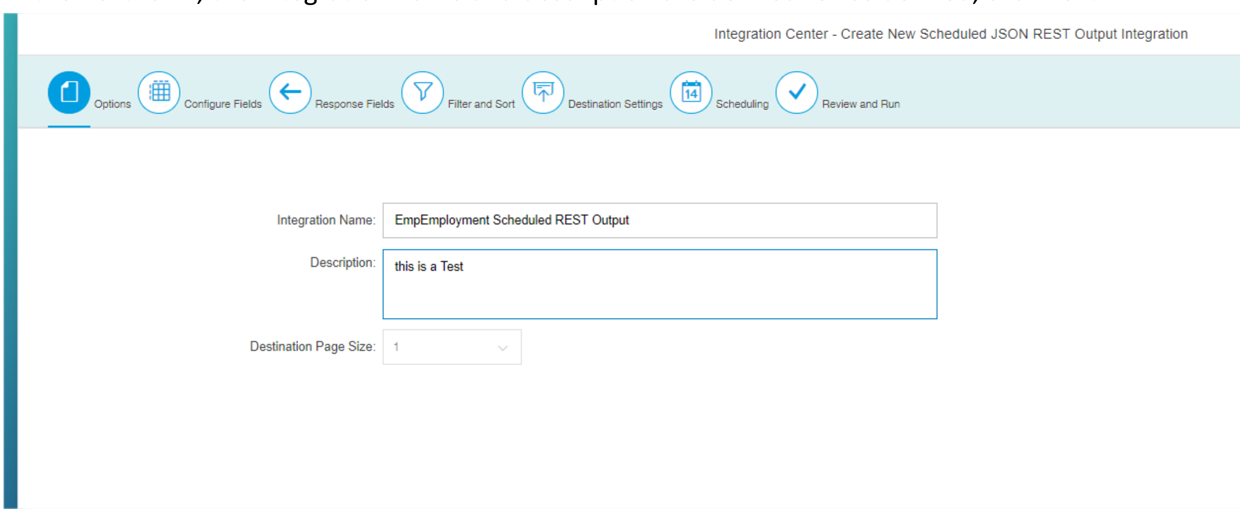


2) Proceed to create integration, click on "Create" then click "Import Integration Definition". This following file contains the configuration of the integration (the .icd file is provided by the vendor)

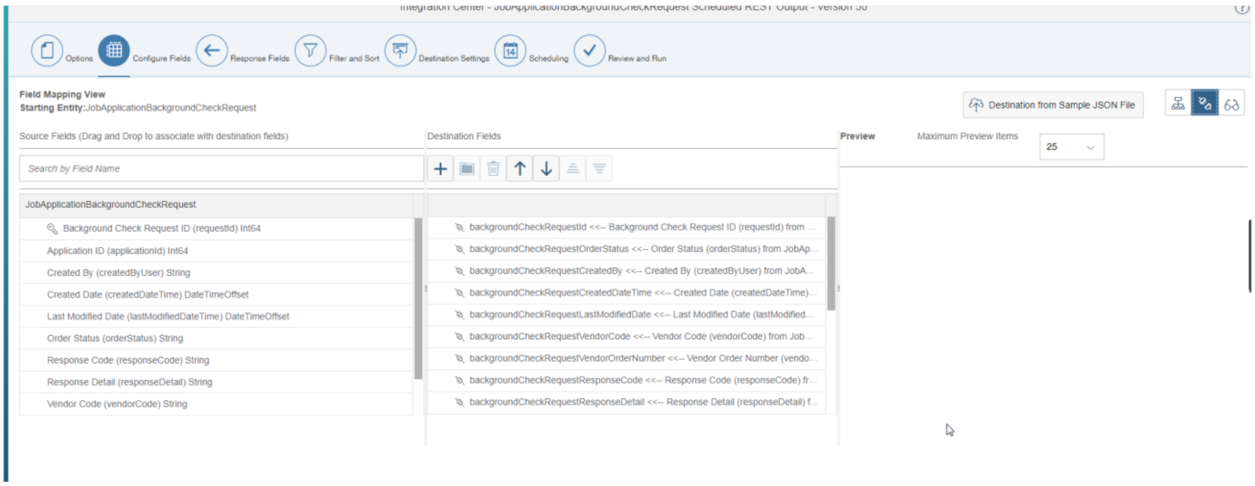
JobApplicationBackgroundCheckRequest Scheduled REST Output_definition.icd



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



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.

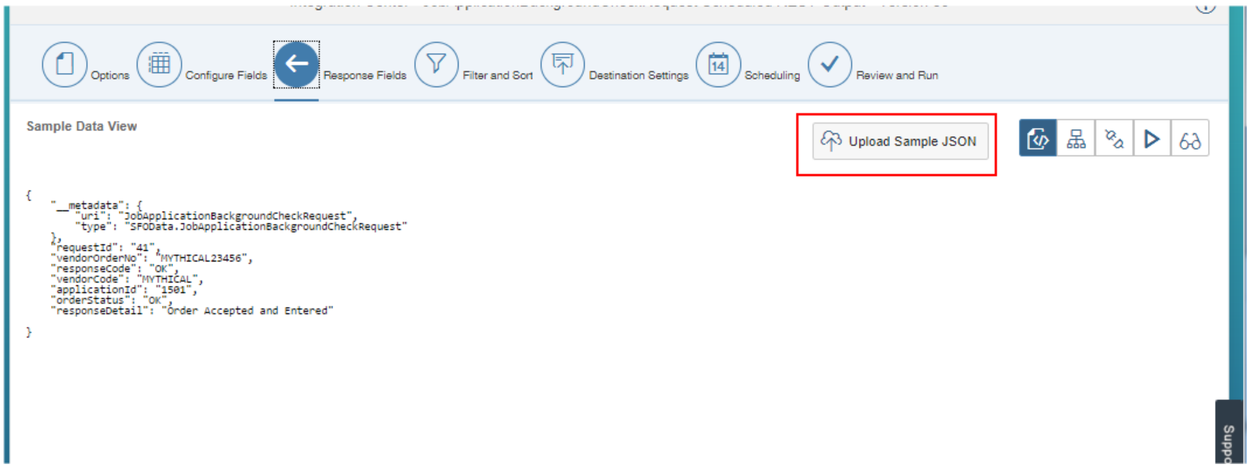


The Json file to send to the vendor integration looks as following:


```
{
  "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.

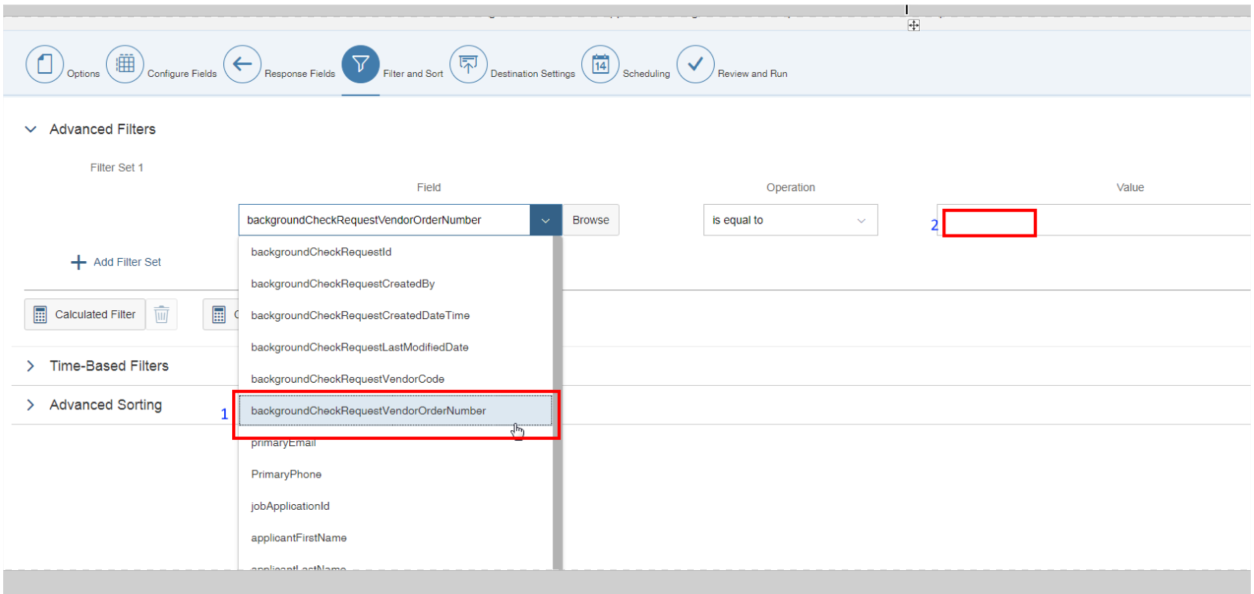
JSON_Response.JSON



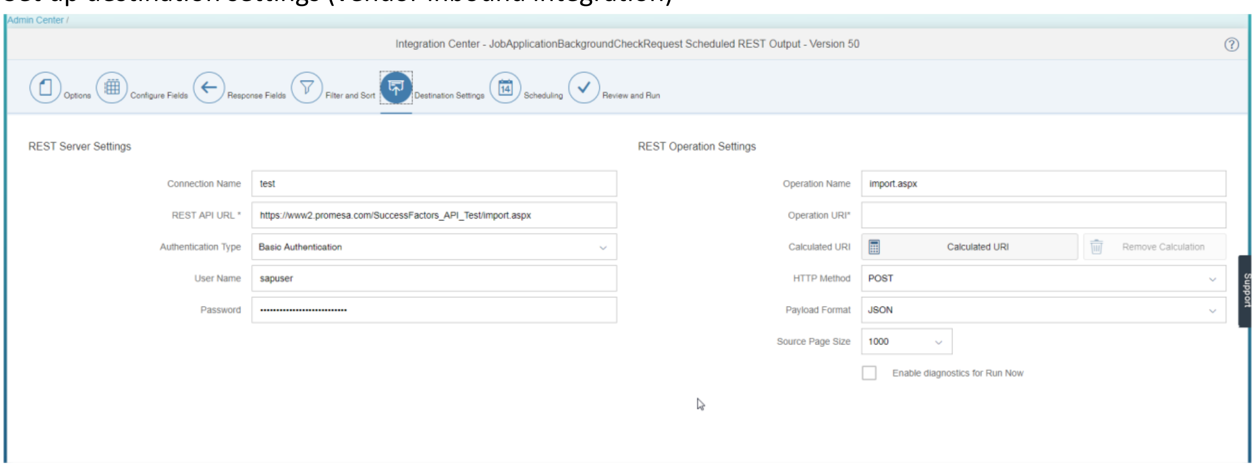

```
{
    "__metadata": {
        "uri": "JobApplicationBackgroundCheckRequest",
        "type": "SFOData.JobApplicationBackgroundCheckRequest"
    },
    "requestId": "41",
    "vendorOrderNo": "MYTHICAL23456",
    "responseCode": "OK",
    "vendorCode": "MYTHICAL",
    "applicationId": "1501",
   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

}
```

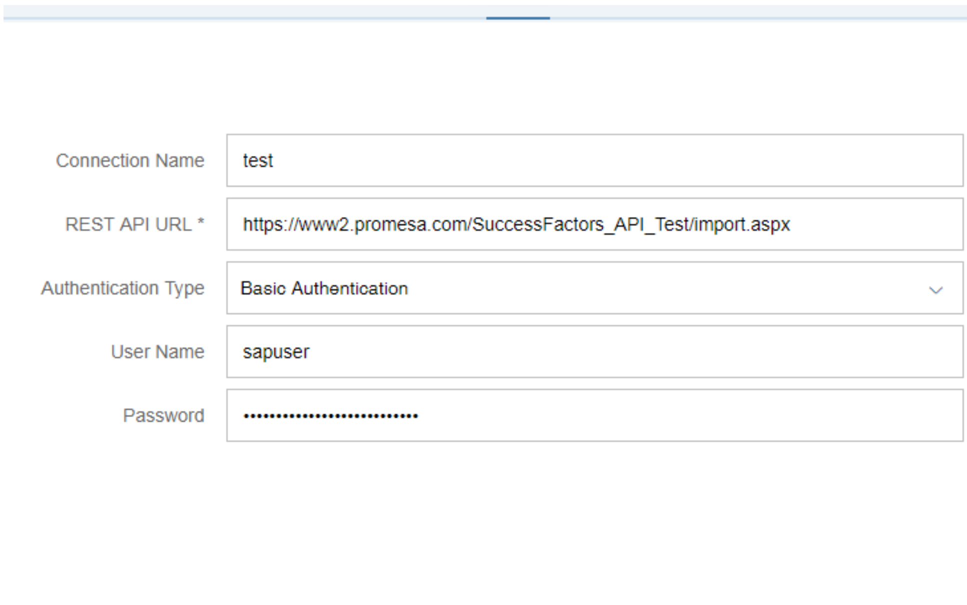
6) Create a filter to manage the new background check:
One example of this is the filter “`backgroundCheckRequestVendorOrderNumber`” = null or empty



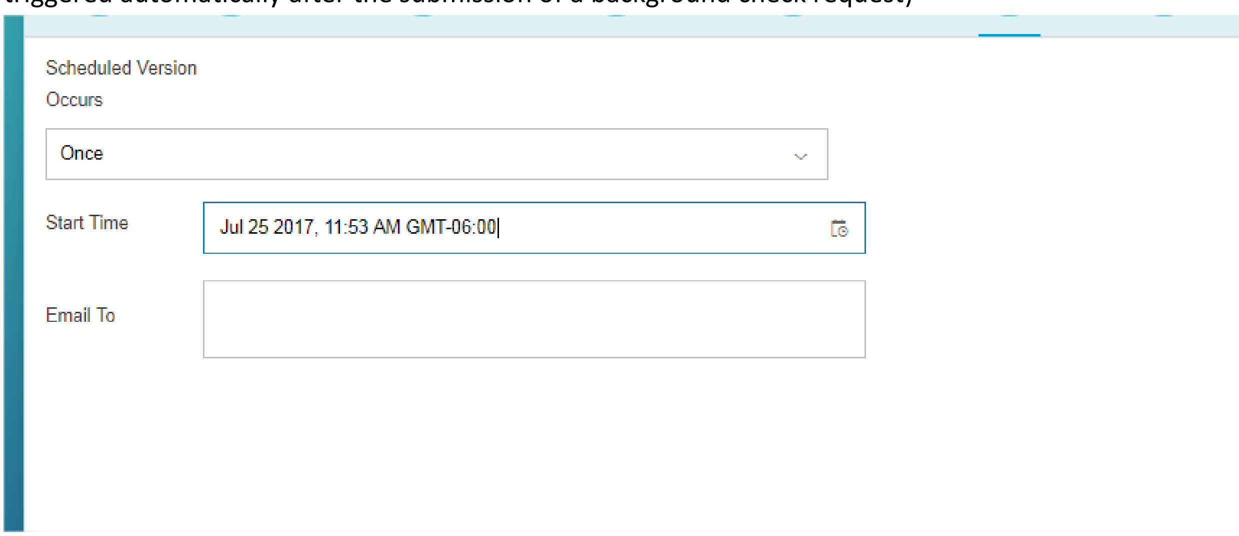
7) Set up destination settings (vendor inbound integration)



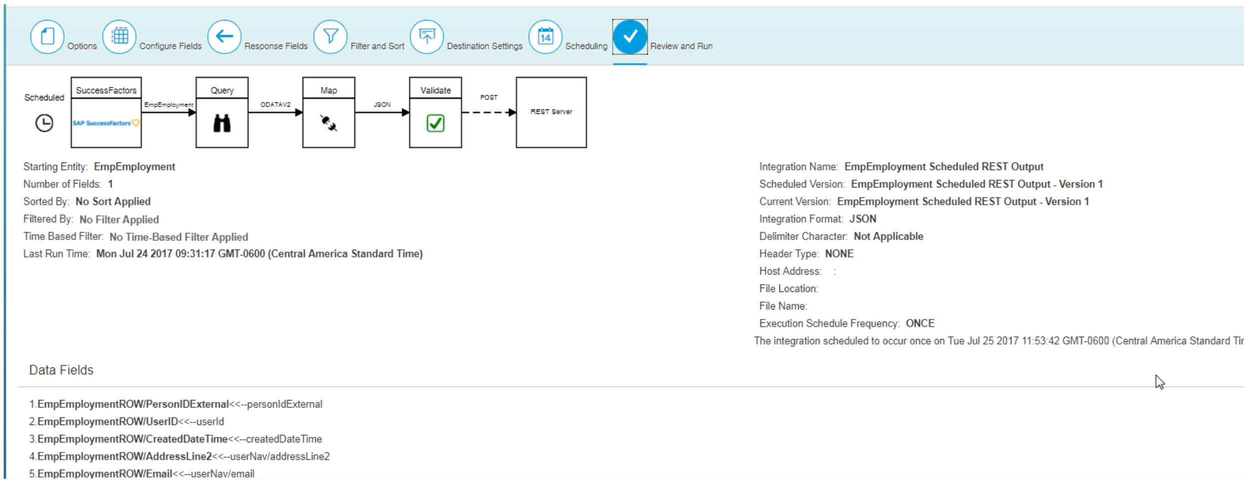
Set up the Rest URL (https://www2.promesa.com/SuccessFactors_API_Test/import.aspx), user and password and the method in this case is POST



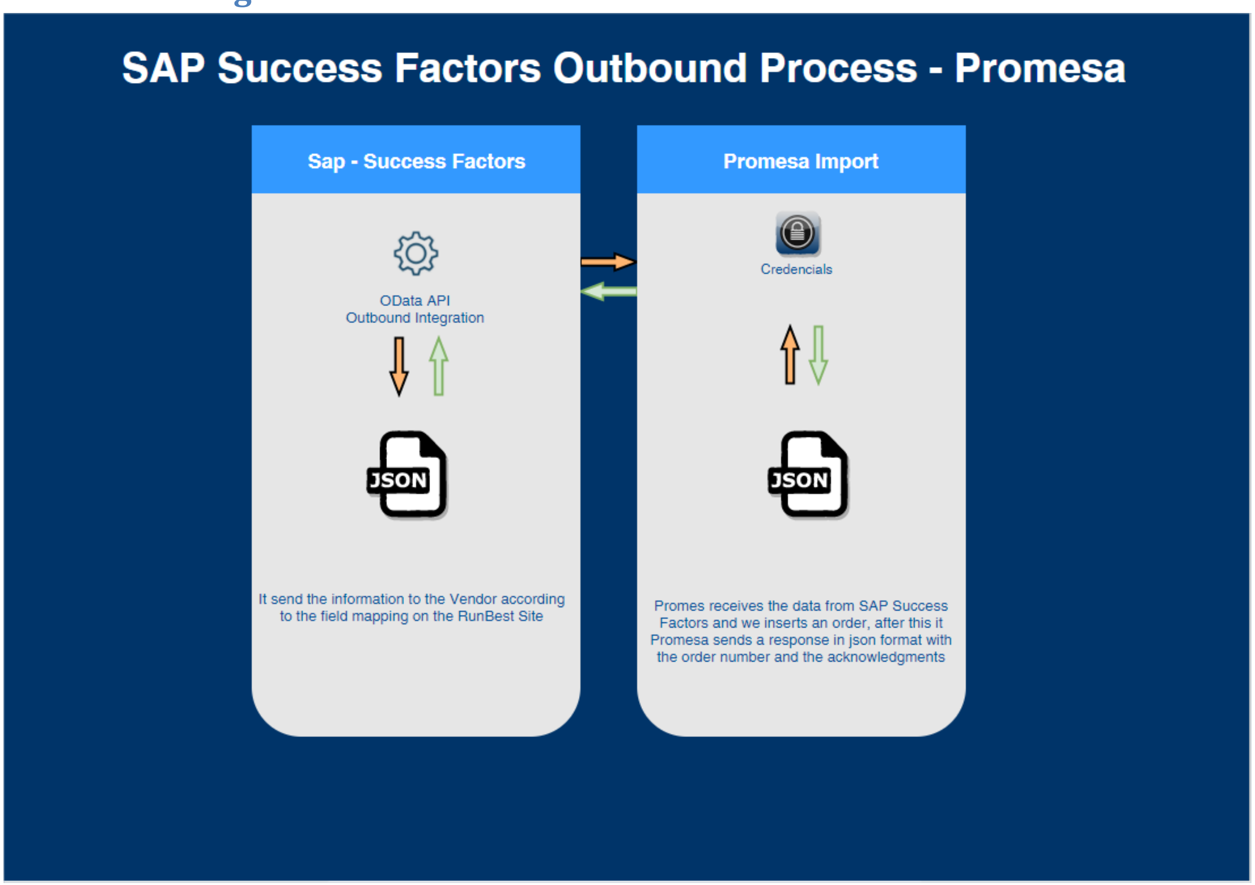
8) Optional: you can schedule a timer to trigger the integration. (Currently, the integration is being triggered automatically after the submission of a background check request)



9) Review and run :



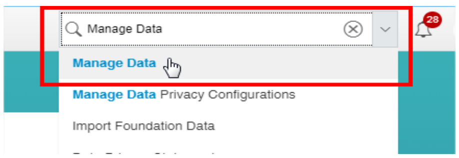
Outbound integration – General flow



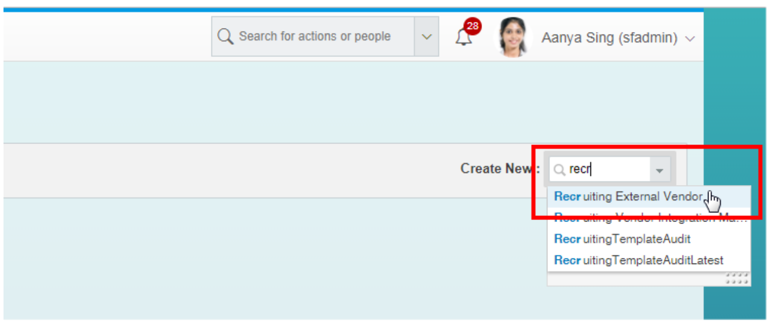
Create and map background check vendor – Salesdemo

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

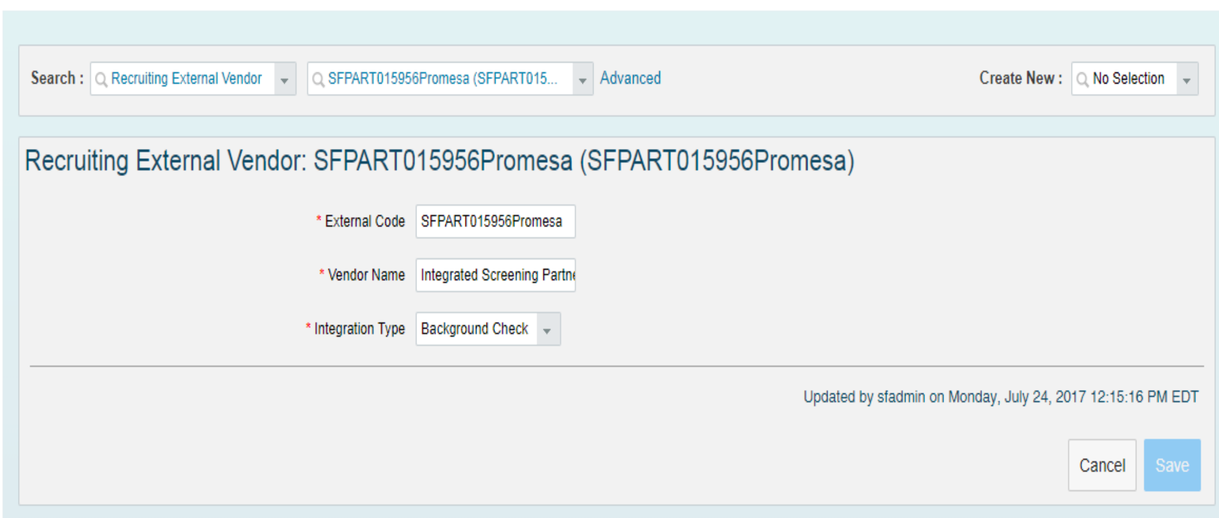
1- On the top search field type "Manage Data" and hit enter



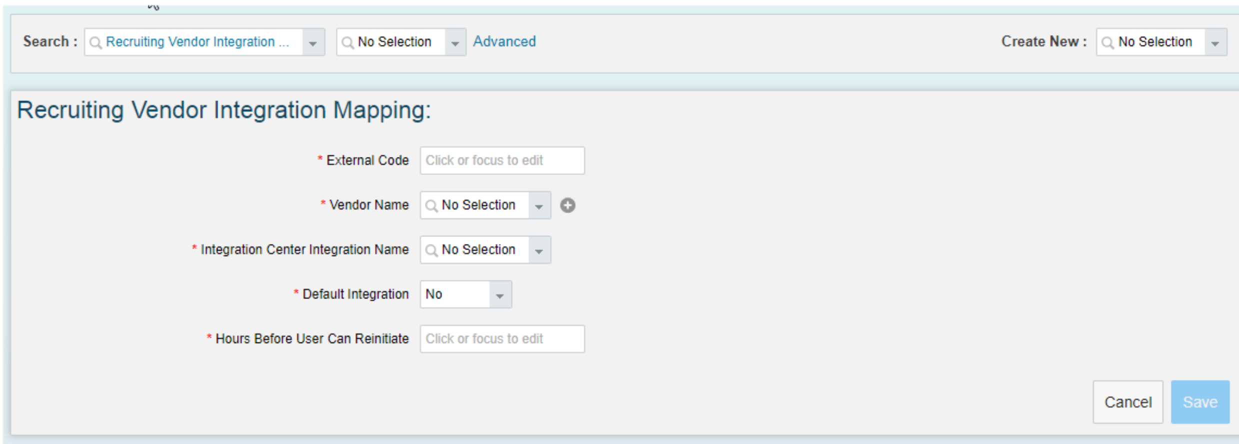
2- Type in the Create New "Recruiting External Vendor",



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.

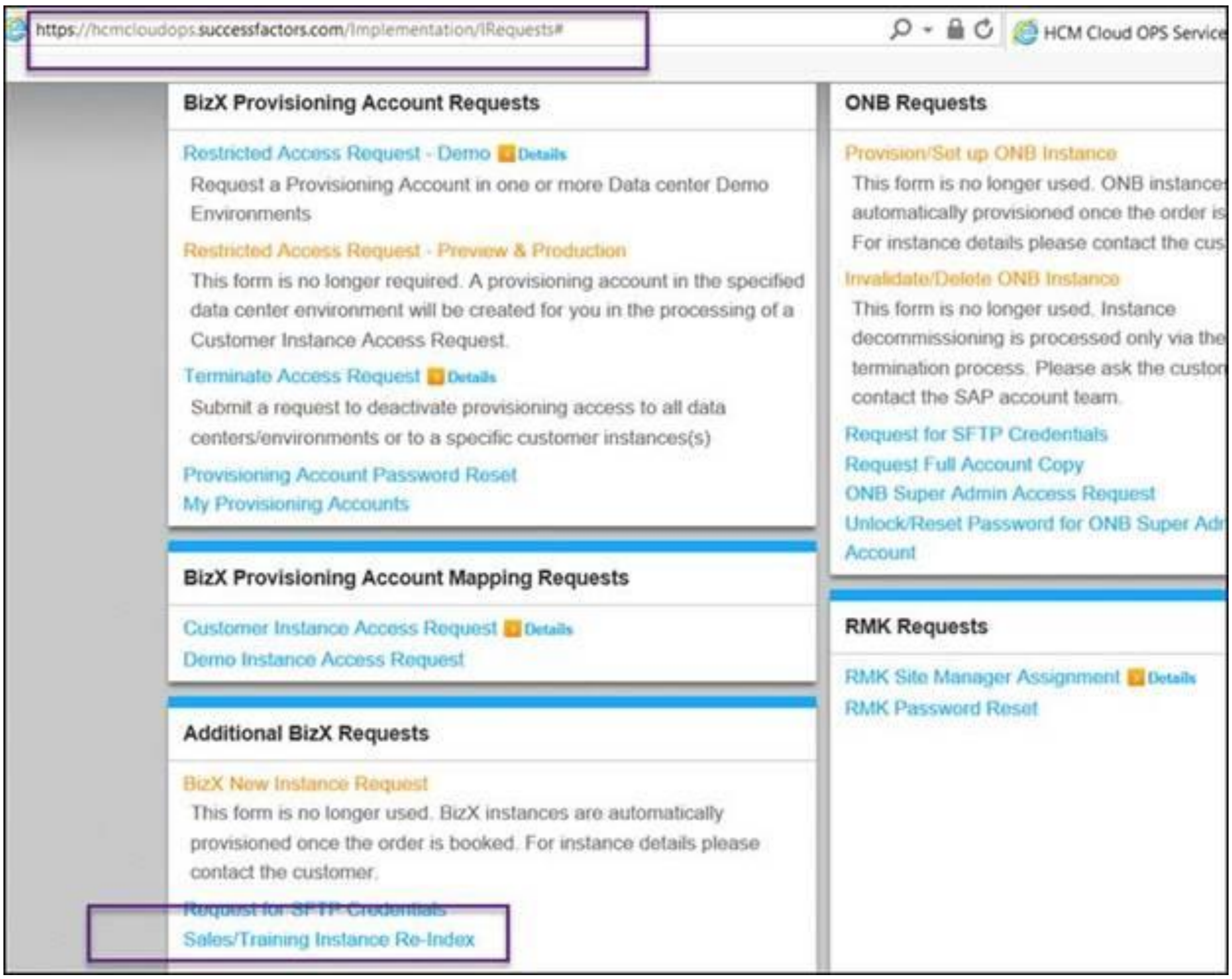


Enabling the "Add Candidate" option - HCM Cloud Ops portal

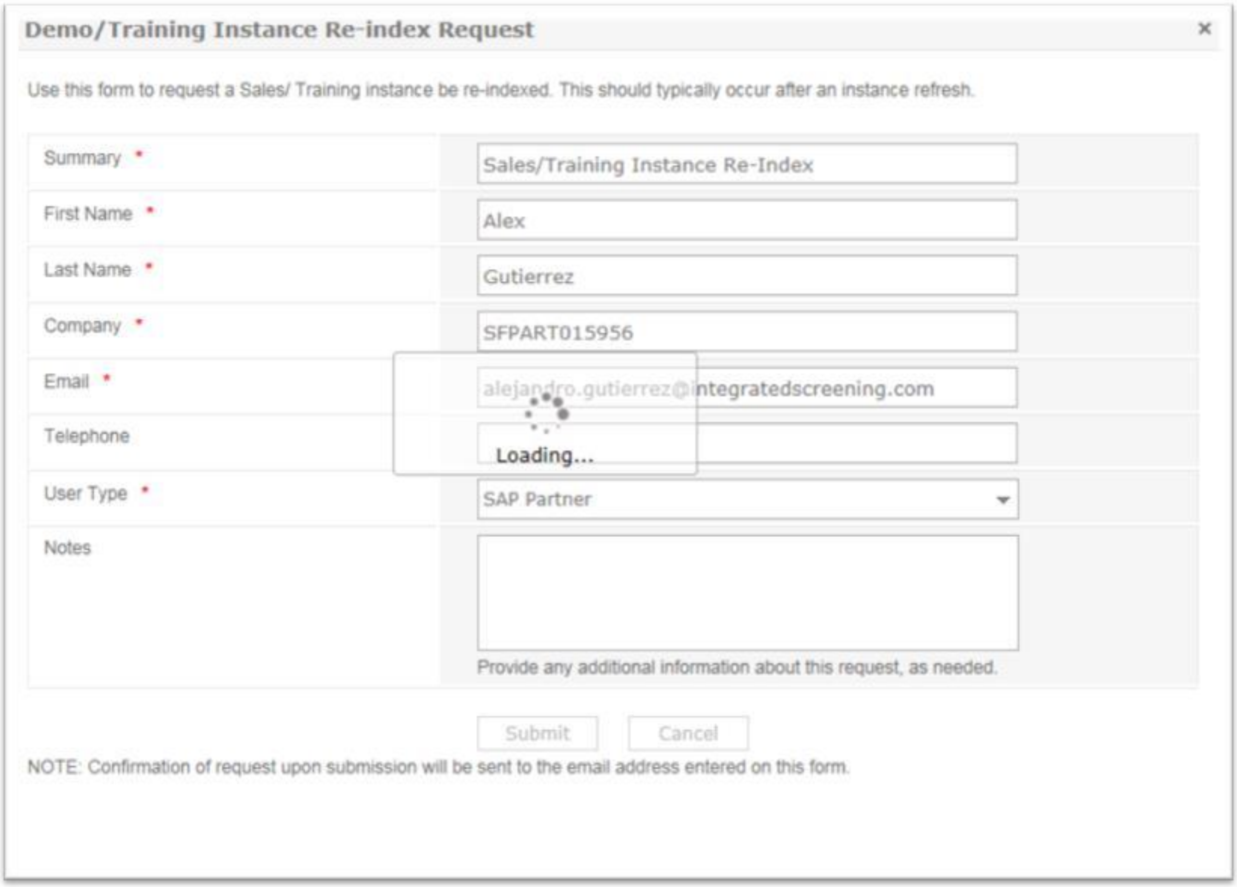
The Candidate portal is the web interface that allow candidates to create a profile and apply for a job (the candidate adds the information), an extension of this web interface is used by the recruiter to create candidates, in this case the recruiter fills the information of the candidate. To enable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

2- Under the "Additional BizX Requests" click on Sales/Training Instance Re-Index.



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.

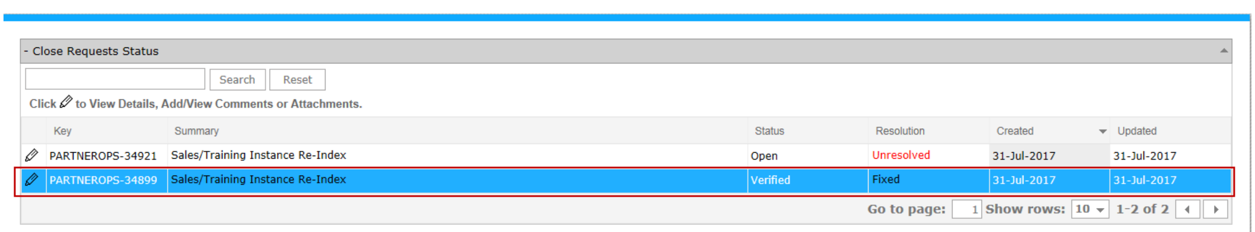
Summary *	Sales/Training Instance Re-Index
First Name *	Alex
Last Name *	Gutierrez
Company *	SFPART015956
Email *	alejandro.gutierrez@integratedscreening.com
Telephone	
User Type *	SAP Partner
Notes	Provide any additional information about this request, as needed.

Loading...

Submit Cancel

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

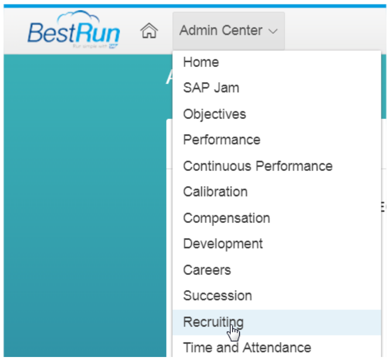
Click to View Details, Add/View Comments or Attachments.

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

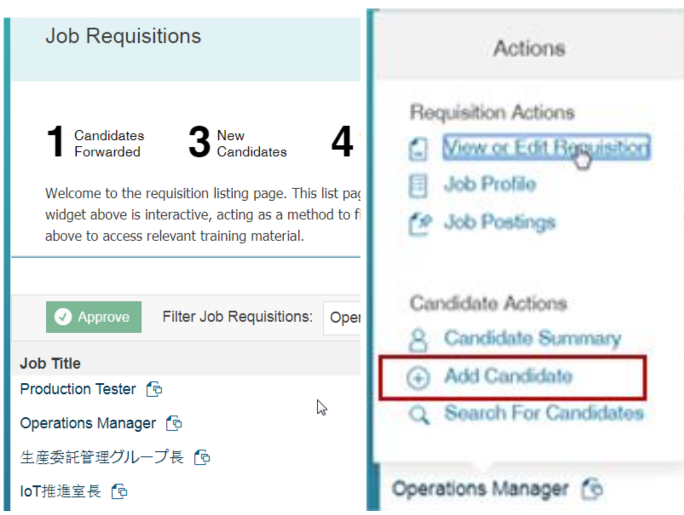
Go to page: 1 Show rows: 10 1-2 of 2

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".

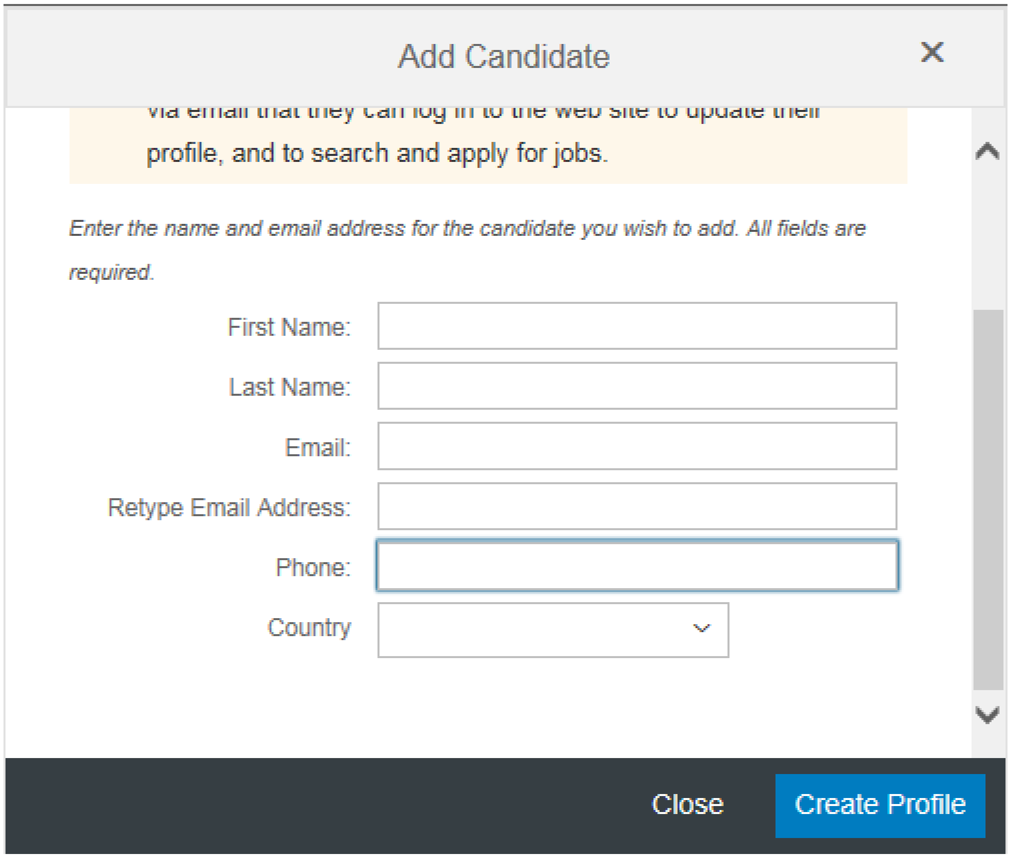


2- Hover your mouse over any of the Job Requisitions and you will get the below menu. Click "Add Candidate".

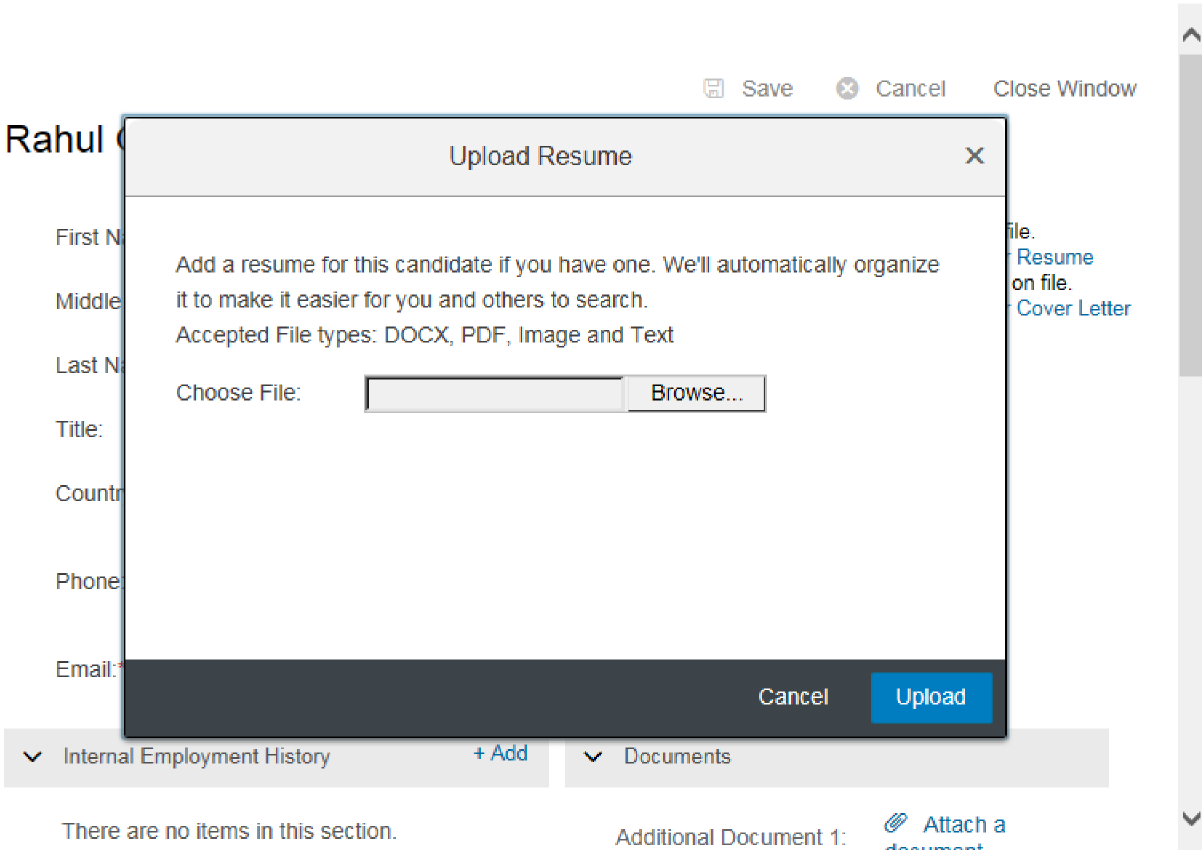


3- The below screen will be displayed. Click on "Add Candidate" over here.

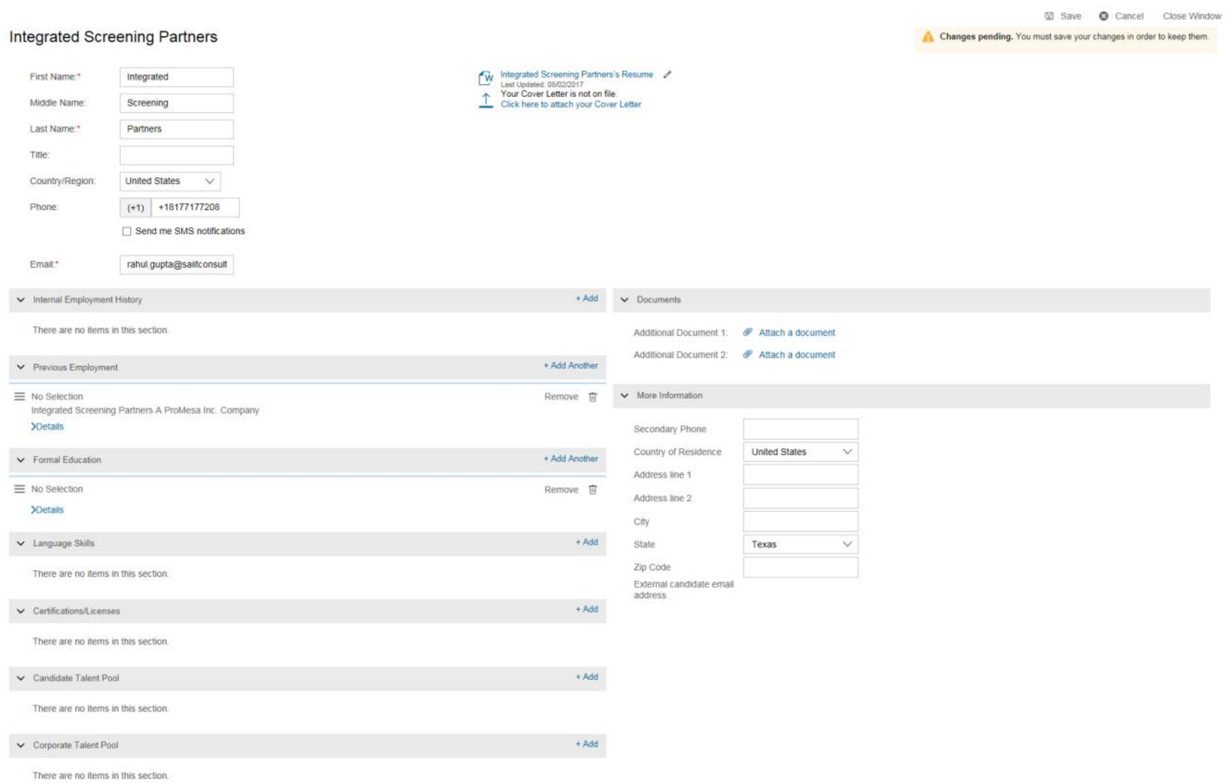
4- The below screen will be displayed. Fill the candidate information in it and click "Create Profile".



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”.

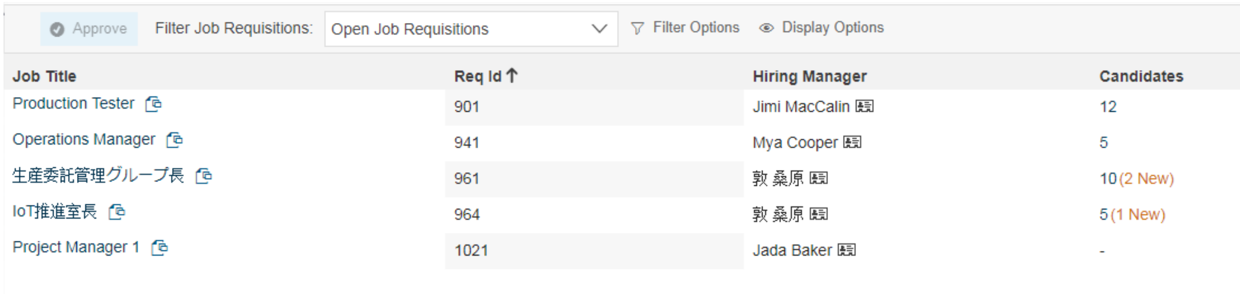


6. It will read the necessary information from the word file and display it on the below screen. You can make the necessary additions/changes. Click save.

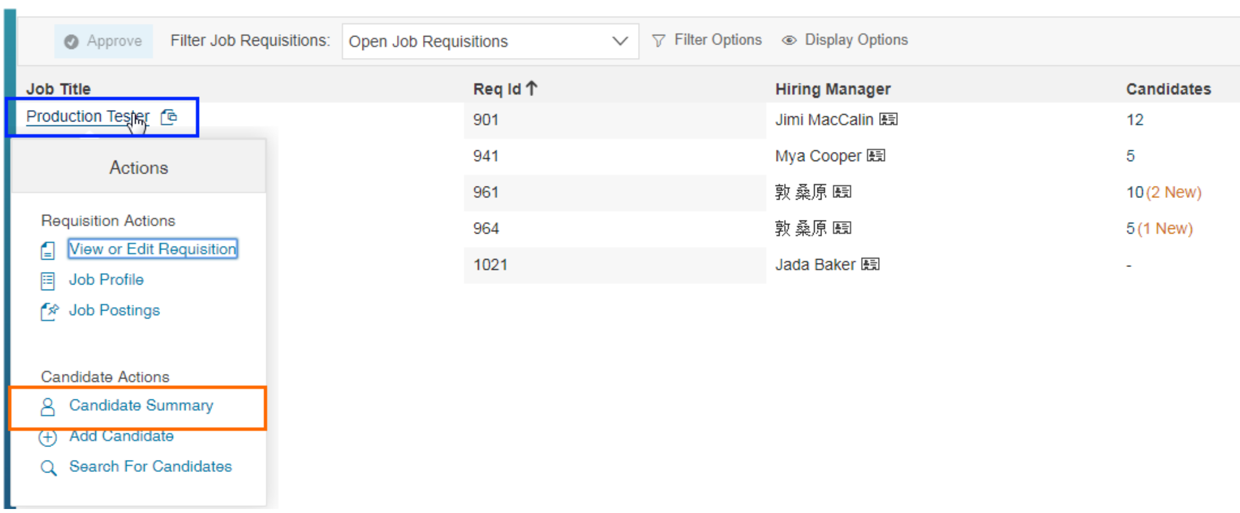


Apply to a job – Salesdemo

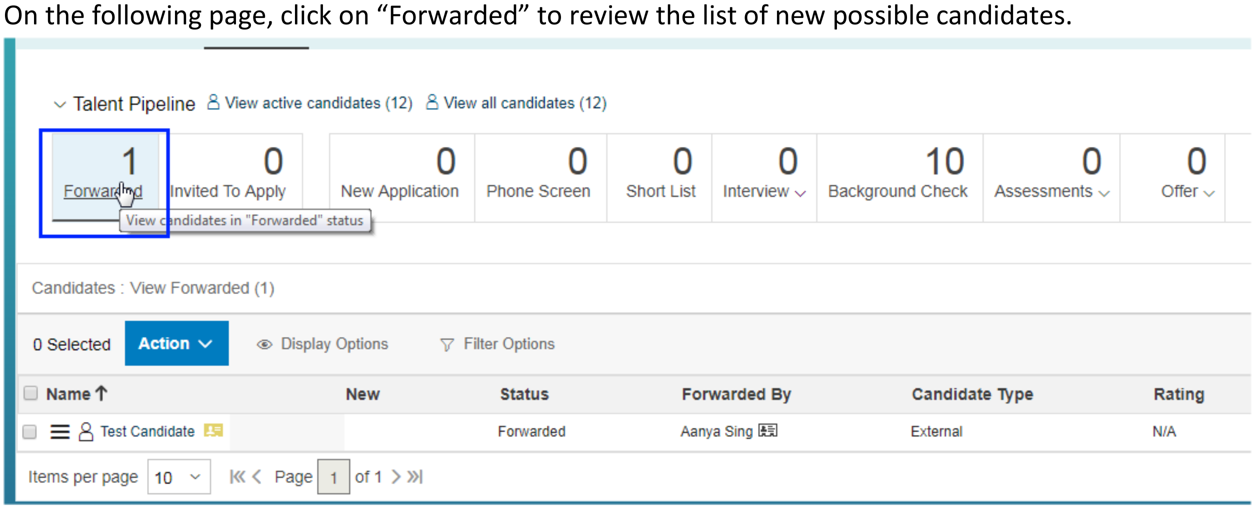
1- Click on the information under Candidates column for the job to which you need to apply.



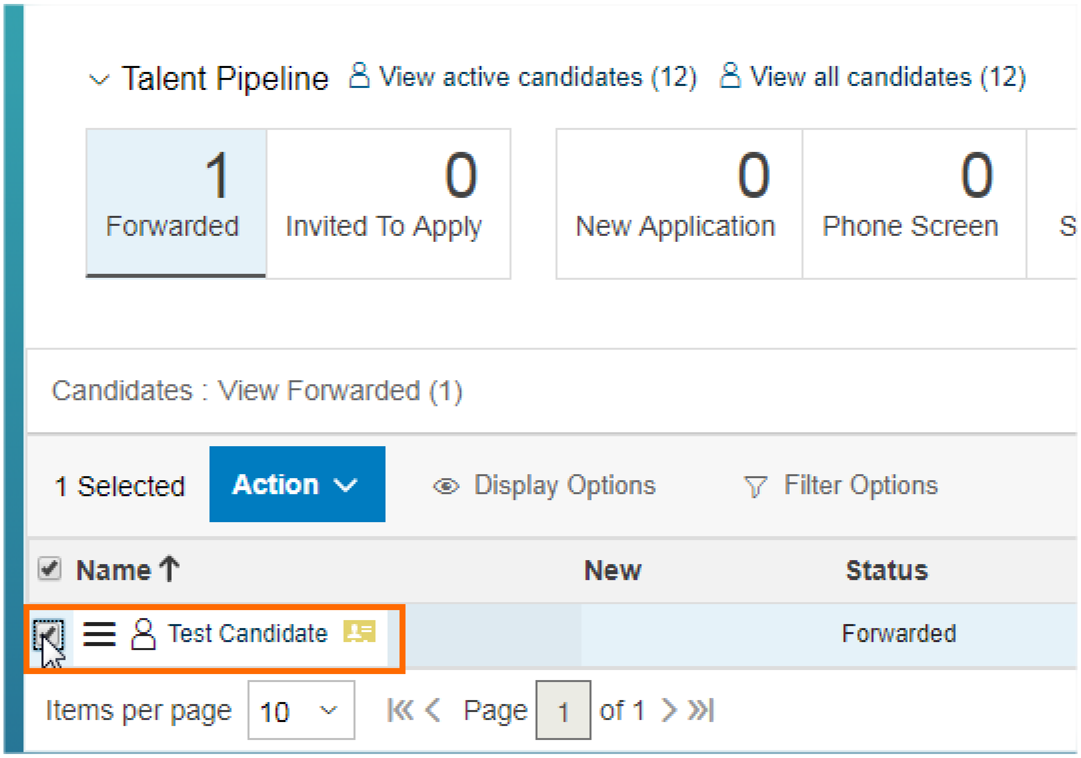
2- Move the mouse over the Job Title, and click on candidate summary:



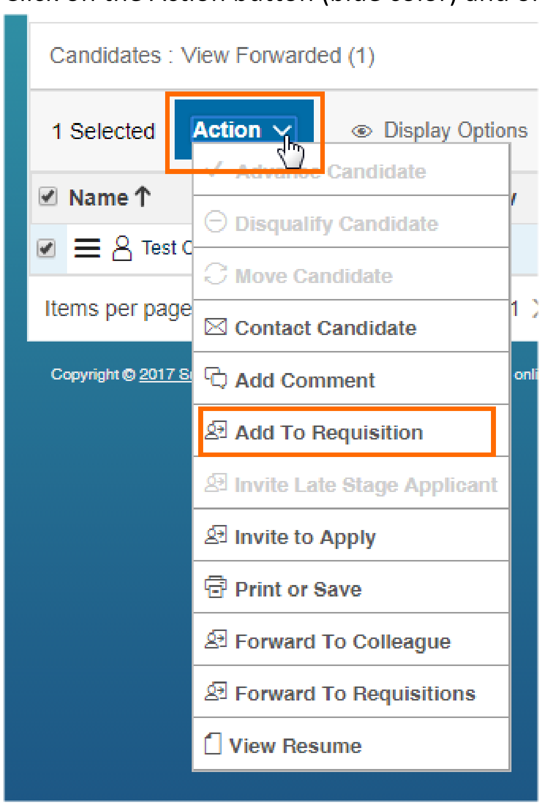
3- On the following page, click on "Forwarded" to review the list of new possible candidates.



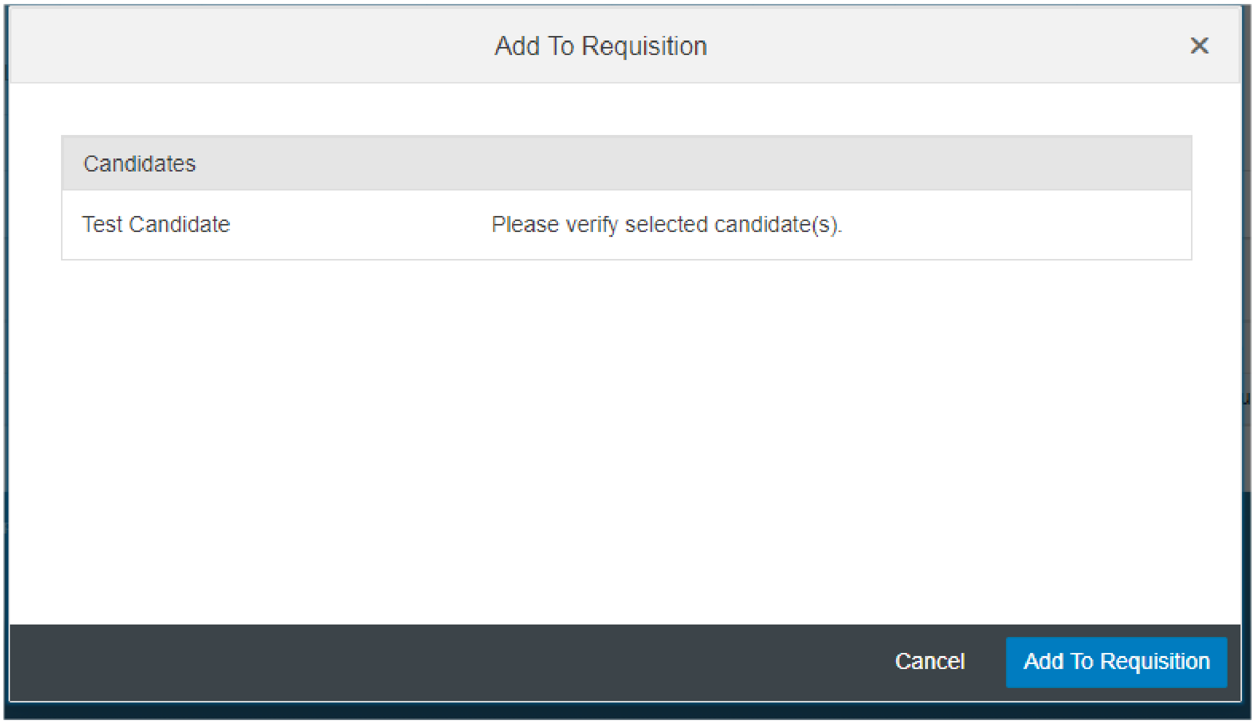
4- When the page has been loaded, select the candidate clicking on the checkbox.



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



6- Confirm the action clicking on Add To Requisition



7- You will get a confirmation message: