Modifying and Utilizing the Sample Background Check Integration Center Definition Template

A Step-by-Step Guide

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Run Simple

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INTRODUCTION

The purpose of this document is to offer step-by-step instructions on how to utilize and, if needed, modify the Integration Center template, that is used for the Background Check functionality within SAP SuccessFactors Recruiting Management.

Important note.
This documents only applies to instances, where customers want to use the Background Check functionality with a custom vendor and <u>does not</u> apply to instances where customers are using the productized integration with either First Advantage or Verifications Inc.

In order to understand this document, please review the following documentation first:
- SAP SuccessFactors Recruiting Management Implementation Guide (link), specially the sections about setting up Background Check with a custom vendor (link)
- SAP SuccessFactors Integration Center Guide (link)

Important note.
It is extremely important to understand Integration Center and the related functionality. This guide does not include detailed instructions and the “big-picture” of the setup that is needed in this tool to make the Background Check work.

Appropriately permissioned admin users can access Integration Center through the SAP SuccessFactors Admin Center (Figure 1). The tool needs to be enabled and the instance needs to be properly configured. Review all prerequisites in the Integration Center Guide.

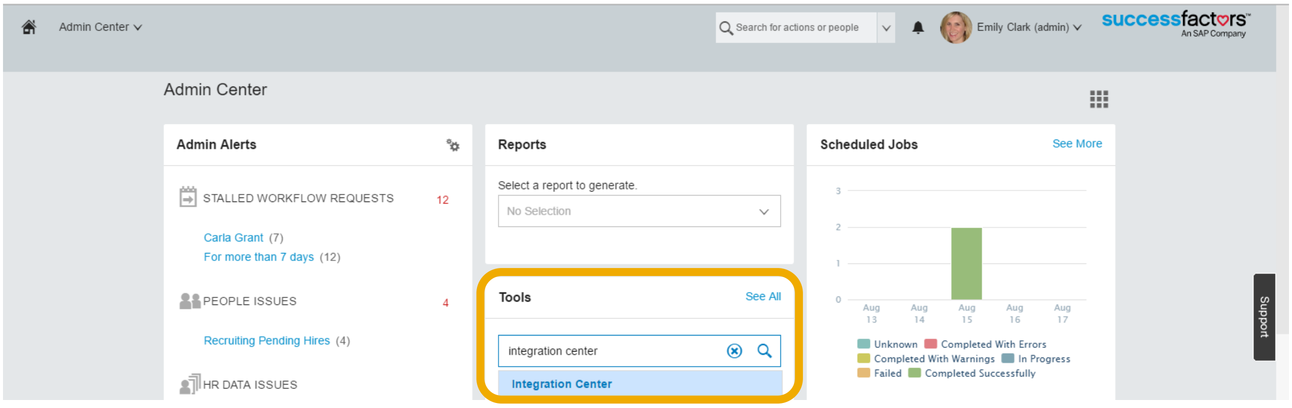

Figure 1: Accessing Integration Center through SAP SuccessFactors Admin Center

Important note.
SAP SuccessFactors customers can create the Integration Center template from scratch. A template is provided as help – as a starting point. In case the customer and the background check vendor defined a very complex integration center template payload it may be easier to create and define a completely fresh Integration Center template. While there is a brief chapter dedicated to this topic, customers will find all the details around defining these kinds of templates in the Integration Center guide. Background Check Integration Center template is just one way of utilizing this suite-wide tool.

DOWNLOADING THE SAMPLE INTEGRATION DEFINITION

First, download the sample integration definition for the Background Check functionality. There are at least two ways to do this.

First option. Access from within Integration Center.

- Navigate to: Admin Center → Integration Center → My Integrations → Browse Catalog
  In the catalog, simply search for Background Check and download the files, including the .icd-file.

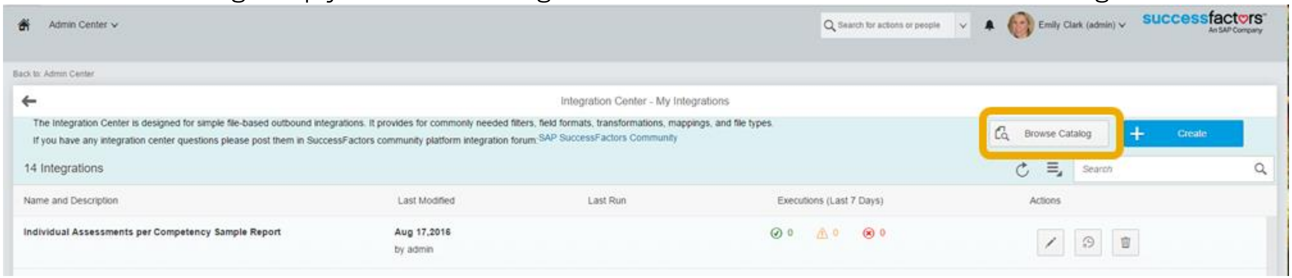

Figure 2: Search the online catalog for the predefined export definition sample for the Background Check

Second Option. SAP API Business Hub.

- Navigate to: api.sap.com → Integration
  Again, search for Background Check and download the files, including the .icd-file.

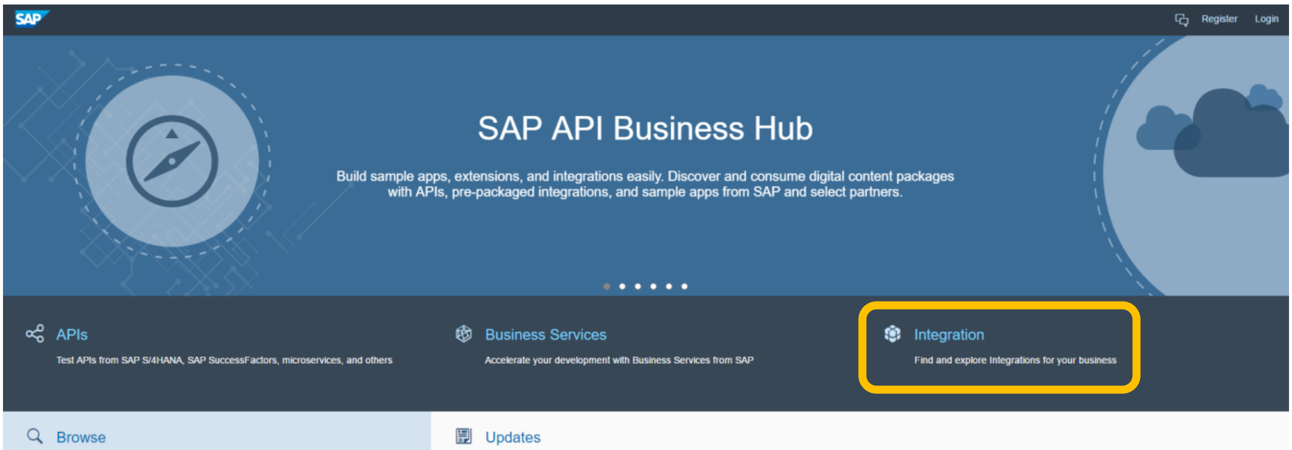

Figure 3: Downloading the .icd Sample Integration File from SAP API Business Hub

IMPORTING THE SAMPLE INTEGRATION DEFINITION INTO SAP SUCCESSFACTORS

Once the .icd-template file is downloaded, we need to import it into SAP SuccessFactors.

Procedure. Importing the sample integration definition using SAP SuccessFactors Integration Center.

- Navigate to: Admin Center → Integration Center → My Integrations → Create → Import an Integration Definition (Figure 4)
- Select the downloaded icd.-file that contains the sample Integration Center Template. Then select "Upload". (Figure 5)
- Next, you will be presented with a setup process, represented with tabs. (Figure 6)

Important note.
Please refer to the Integration Center guide for details on the "big picture" meaning behind each of the tabs that need to be set up.

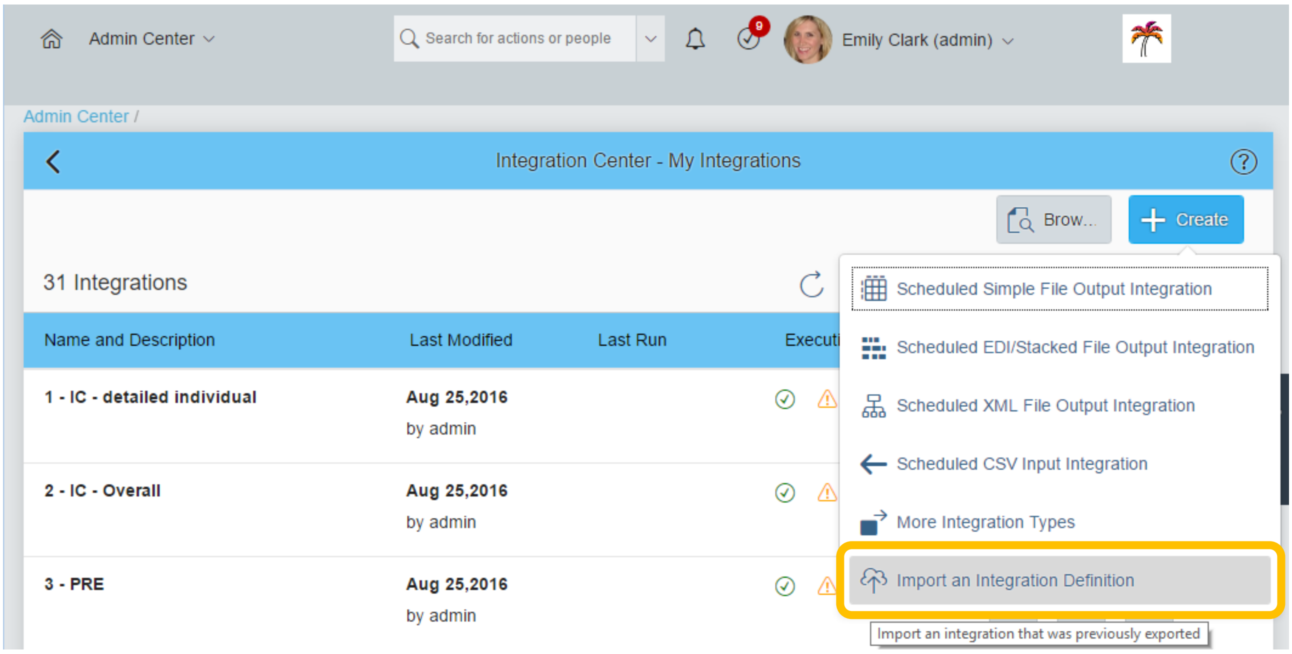

Figure 4: Importing a Predefined Integration Definition as the Starting Point

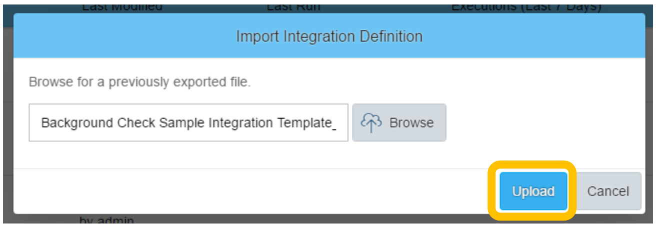

Figure 6: Importing an Existing .icd-file

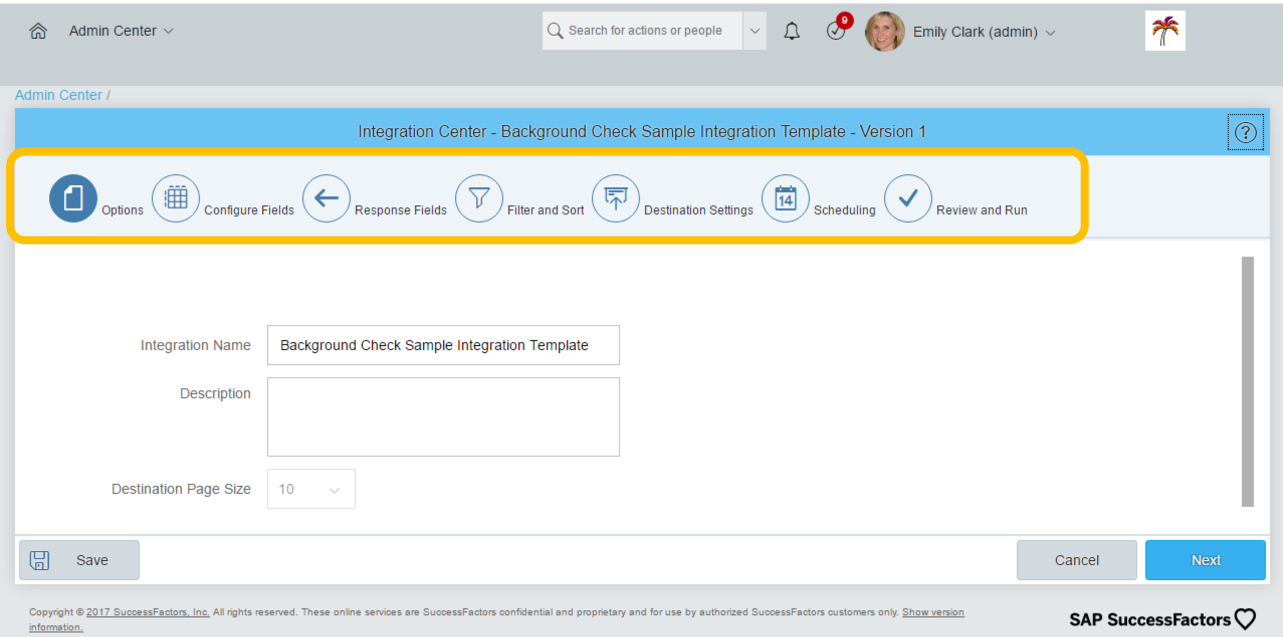

Figure 5: Importing and Modifying an Existing Integration Center Template

In the next section, we will briefly cover the meaning and the setup under each of the setup tabs (Figure 6). We are not covering all the available options! For details, refer to the Integration Center documentation. Integration Center is an admin tool, that can be utilized by modules other than SAP SuccessFactors Recruiting Management.

Options

Assign (change, if needed) the name of the integration you are creating.

Configure Fields

Under this tab, the outbound payload is configured. Once the integration is triggered, the structure defined here will be populated with actual data that will then be sent to the – in our case – background check vendor.

- Make sure “Detail View” is selected ().
- Now you can either confirm the structure or you can add or remove fields to the payload. You can always review the structure in the “Preview” section. (Figure 7)

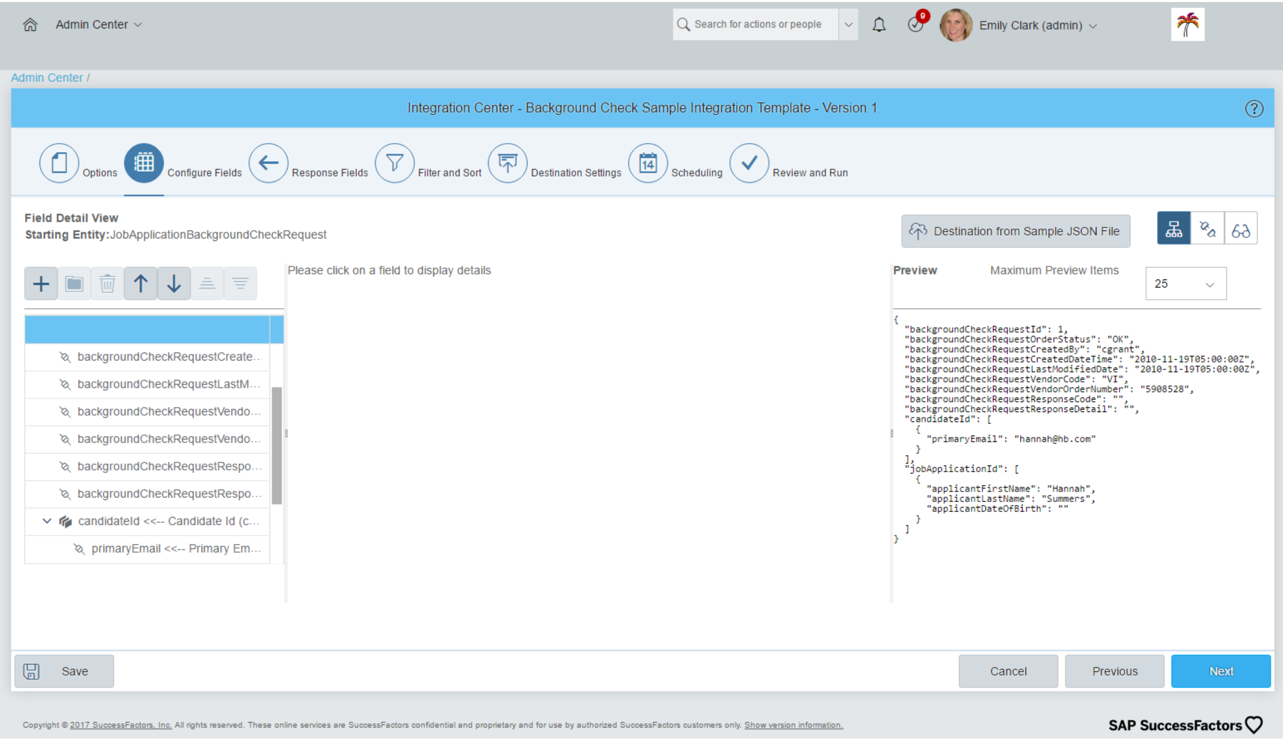

Figure 7: "Configure Fields" Tab

Adding Fields to the Sample Template

Let’s assume we need to add an additional field to the payload. Let’s add candidate’s primary phone.

- In the right section, click on the “candidateId” so that it is selected. This will be the parent element, under which we will add a new child element.
- Select  → Insert Child Element.
- Click on the newly added child “Element”, so that it is selected and change its Label to “primaryPhone” (Figure 8).
- In the middle section, select the option “Set an Associated Field” ().
- Now, associate the newly added child element with the desired property in OData API.
    - Find the field directly by entering the field name into the “Enter for Field Name” (Figure 9).

- Alternatively, you can use the “Entity Tree View” tool to navigate to related OData API Entities and select any field you may need (Figure 10).

- Once you have identified the field you want to associate with the “primaryPhone”, confirm selection by “Change Association to [[field name]]”.
- The “Preview” section on the right side of the screen should display the newly added field with a corresponding sample value, but only when the value is maintained for this record (Figure 11).

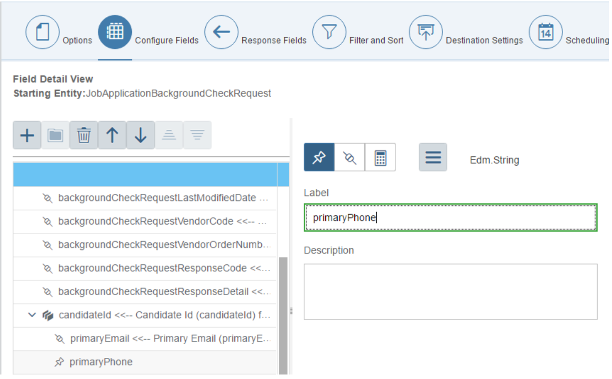

Figure 8: Changing the Field Label

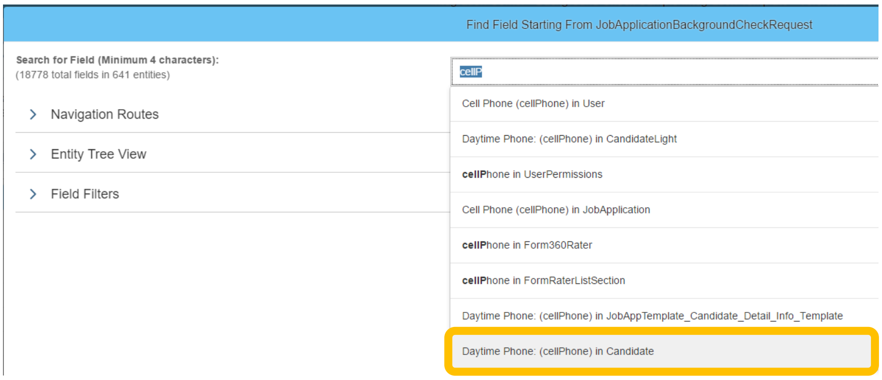

Figure 9: Search for Fields to Associate Offers Auto-Complete Functionality

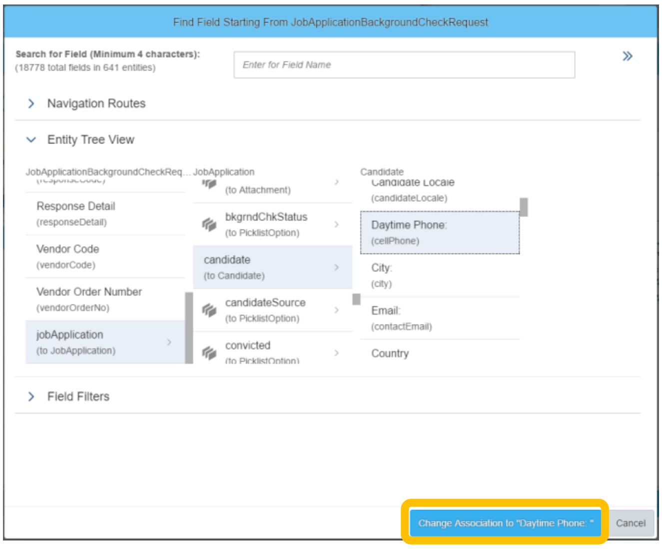

Figure 10: Entity Tree View is Another Powerful Tool for Associating Fields

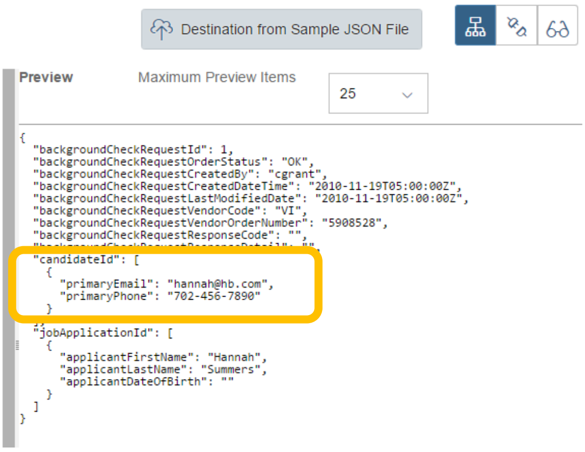

Figure 11: The "Preview" Displays the Newly Added Field with the Respective Sample Value in Real-Time

Removing Fields from the Sample Template

If you wish to remove a field from the outbound payload, simply select the field and remove it with by selecting "Delete the item" ( ). Carefully observe the changes in the "Preview" section.

Important to consider

Please consider the following.

- Integration Center relies on the same data engine as the OData API. In other words, whatever OData API entities and properties are publicly exposed can be utilized in Integration Center.
- Use the following resources for exploring the OData API model to see, what entities and properties are publicly exposed and available to be utilized, and how they are interrelated.
    - *Admin Center → OData API Data Dictionary.*
      This tool is used for exploring the details about exposed OData API entities and properties, sorted per SAP SuccessFactors module/domain/sub-solution (e.g. Recruiting).
      (Link to the official documentation.)
    - *Admin Center → Integration Center → Data Model Navigator*
      This tool displays the relationships between various OData API Entities. It makes it easier to understand the (publicly available) data model within SAP SuccessFactors.
      (Link to the official documentation.)
    - Official OData API Help Guides. Check for OData API Developer and OData API Reference Guides under the "Development" section.
      (Link to the official documentation.)
- In the sample Integration Center template, the "JobApplicationBackgroundCheckRequest" is set as the starting OData API Entity. This is required for this type of integration – that will support the Background Check with a custom vendor. The synchronous inbound call, that we will define in the next step, needs to go back into this entity – and the only way to achieve this is to specify the mentioned OData API Entity as the starting entity. (Please refer to Integration Center support guides for more information on synchronous REST integration types).

Response fields

Under this tab, the inbound part of the integration must be defined. The main purpose is for the background check vendor to confirm the background check request, say by responding with an order number.

Important note.
The synchronous REST integration type, that is used for the Background Check with a custom vendor requires for the starting entity to be the inbound entity, as well (in our case, "JobApplicationBackgroundCheckRequest"). Other entities can be added, as needed. Please carefully review the Integration Center guide, particularly the section around synchronous REST integration types. In the inbound payload, the minimum that the vendor needs to send into SAP SuccessFactors, are the required fields in the mentioned, mandatory OData API Entity.

Let's assume, the background check vendor will be sending back the following response in the JSON format (Figure 12).


```json
{
    "appId" : 222,
    "venCod" : "BGC-VEND-A"
}
```


Figure 12: sample .json - sample incoming json structure

In the next steps, we need to map this, incoming JSON message to the fields, that are available in SAP SuccessFactors for the Background Check functionality.

- Under the "Response Fields" tab, select "Switch to Field Mapping View" ( ).
- Select "Upload Sample JSON", select the sample incoming message structure that the background check vendor will use to send the data back to SAP SuccessFactors and confirm with "Upload" (Figure 13).

Figure 13: Uploading a sample .json-file with the structure of the incoming payload

- Now, map the "Source Fields" with the "Destination Fields" by using drag-and-drop. Observe the "Response Preview" section to validate the end result (Figure 14).
  Note. The operation behind the Integration Center is an OData API "upsert". When this Integration Center template will be used with standard Background Check functionality, the "requestId" will be created upon clicking the button "Initiate Background Check" from within the standard web user interface within SAP SuccessFactors Recruiting Management. Make sure to map the existing "requestId" with the corresponding destination field. This ensures that the vendor's incoming message will be upserted into the correct entity. Refer to official SAP SuccessFactors Recruiting Management Implementation Guide (section around the Background Check functionality) to understand the process.

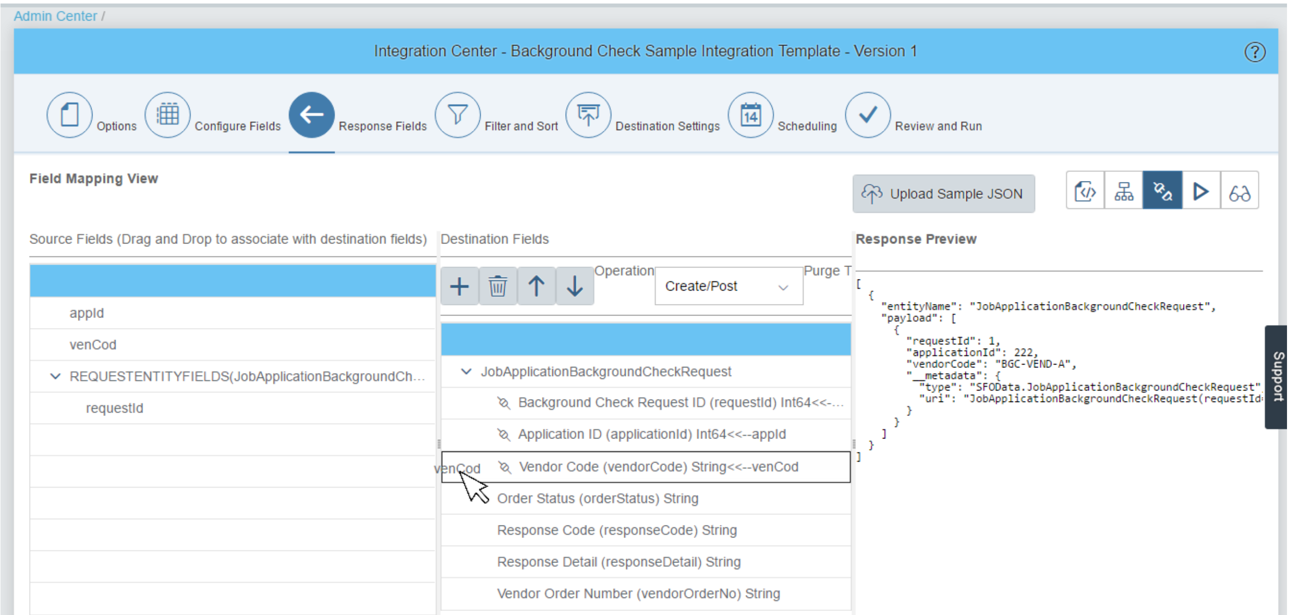

Figure 14: Fields in the response payload and destination fields can be linked by drag-and-drop feature

- Once done, click Next to move to the "Filter and Sort" tab.

Important notes.
- The integration is defined for the JobApplicationBackgroundCheckRequest OData API entity. It contains information about the background check request and the request status.
- The synchronous REST call, that is used for the background check integration, is comprised of the outbound call (defined under the "Configure Fields" tab) and a consecutive inbound call (defined in the "Response Fields").
- Again – both – the outbound and the returning/inbound part of the synchronous REST call use the same "JobApplicationBackgroundCheckRequest" OData API entity as the starting points.
- Synchronous inbound call needs to be executed shortly after the outbound payload is sent, or the connection will time-out.
- For populating the results of a background check another OData API entity is used (JobApplicationBackgroundCheckResult). To populate it, customer/vendors/partners can use standard OData API calls to manipulate the data in this and all other publicly available entities.

Filter and Sort

While Filter and Sort capabilities are not necessary to be set up for the purpose of Background Check with a Custom Vendor, they may offer additional options for a more custom approach.

Important Note.
Please refer to the official Integration Center guide for guidance.

Destination Settings

This tab includes mandatory settings (Figure 15). The destination / end-point URL and other settings will need to be entered. This defines where the outgoing payload will be sent to, and it also established settings to the inbound-part of the synchronous REST call.

None of these settings are specific to SAP SuccessFactors Recruiting Management. Therefore, please refer to the official Integration Center guidebook.

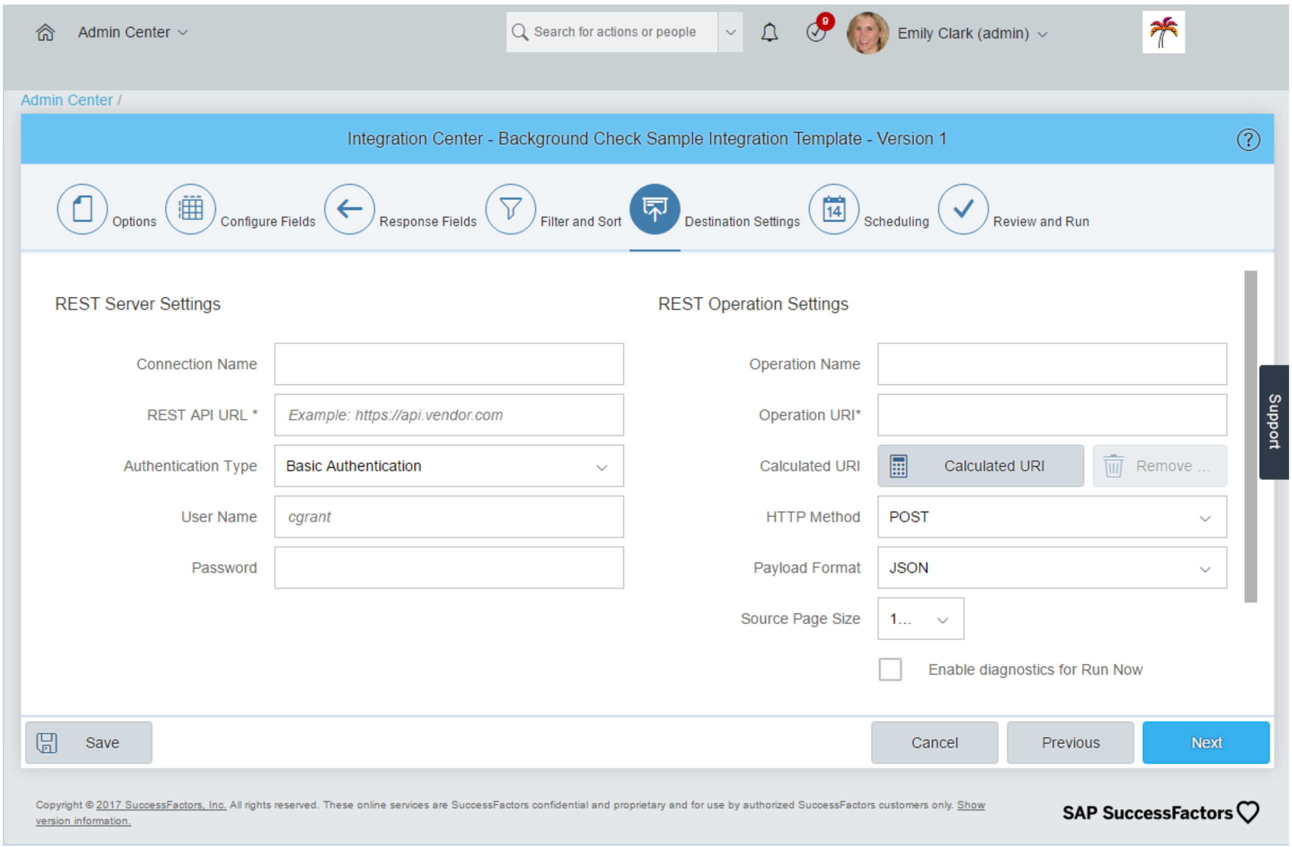

Figure 15: Make sure to fill in the Destination Settings tab

Scheduling

For the “Background Check with a Custom Vendor” functionality, do not configure this tab. The integration will not be invoked on a scheduled basis, but rather upon a recruiting users click the button “Initiate Background Check”.

Important note.
Please review the official SAP SuccessFactors Recruiting Management Guide (section about the Background Check functionality) to understand the process.
For more details about the “Scheduling” tab, please review the official Integration Center guide.

Review and Run

Review the information presented on the screen and save. A dialog will confirm successful creation / import of the integration center template (Figure 16). For additional options, refer to the official Integration Center Guide.

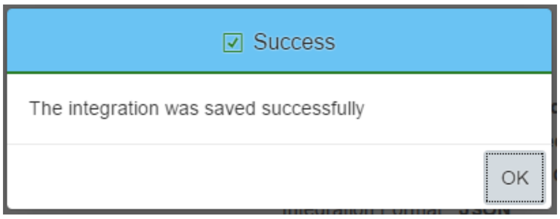

Figure 16: Upon saving the modified Integration Center Template, a "Success" message should be displayed

CREATING THE INTEGRATION DEFINITION FROM SCRATCH

For the purpose of the functionality “Background with a Custom Vendor”, product management at SAP SuccessFactors Recruiting Management prepared a sample integration template that can serve as a starting point that can be modified (see previous chapters). Find it here: https://api.sap.com.

Important note.
Customers/Partners/Vendors can use the Integration Center Admin Center tool to create integration definitions “from scratch”, if they wish to do so. In this case, please thoroughly review both:
- The Implementation Guide for SAP SuccessFactors Recruiting Management, especially the chapters around the functionality “Background Check with a Custom Vendor” (link – check under the “Implementation” section);
- The Integration Center Guide (link – Check under the “Integration” section)

On the following pages, we will outline the steps for creating a background-check-compatible integration definition (.icd) from the beginning. We will only focus on the steps, that differ from what has been explained in the previous chapters.

Defining the Integration Type

Perform the following steps.

- Navigate to Admin Center → Integration Center → My Integrations → Create ()
- Select “Create” () → More Integration Templates (Figure 17)

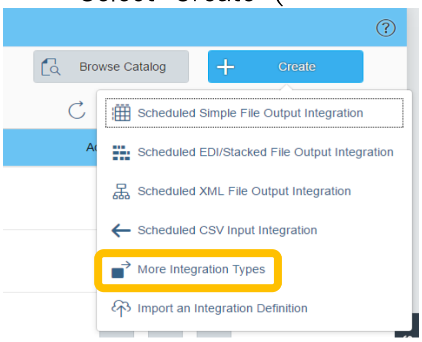

Figure 17: Select "More Integration Types"

- On the “Choose Integration Type” screen, set the following (Figure 18).
  Trigger Type: Application / UI
  Destination Type: REST
  Source type: SuccessFactors
  Format: JSON (alternatively, XML format can be used, too)

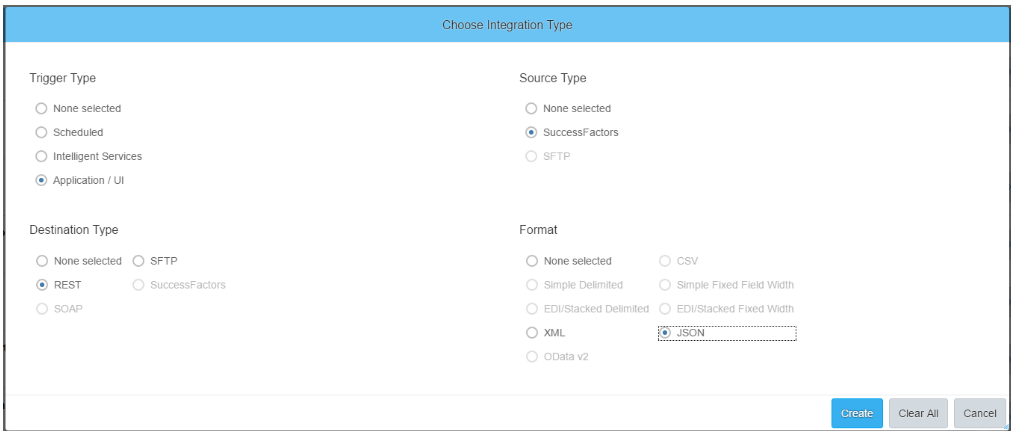

Figure 18: Defining the type of the integration

- Confirm with “Create”.

Defining the Starting Entity

Perform the following steps (Figure 19).
- Search for the “JobApplicationBackgroundCheckRequest” OData API entity.
- Click “Select” to confirm.

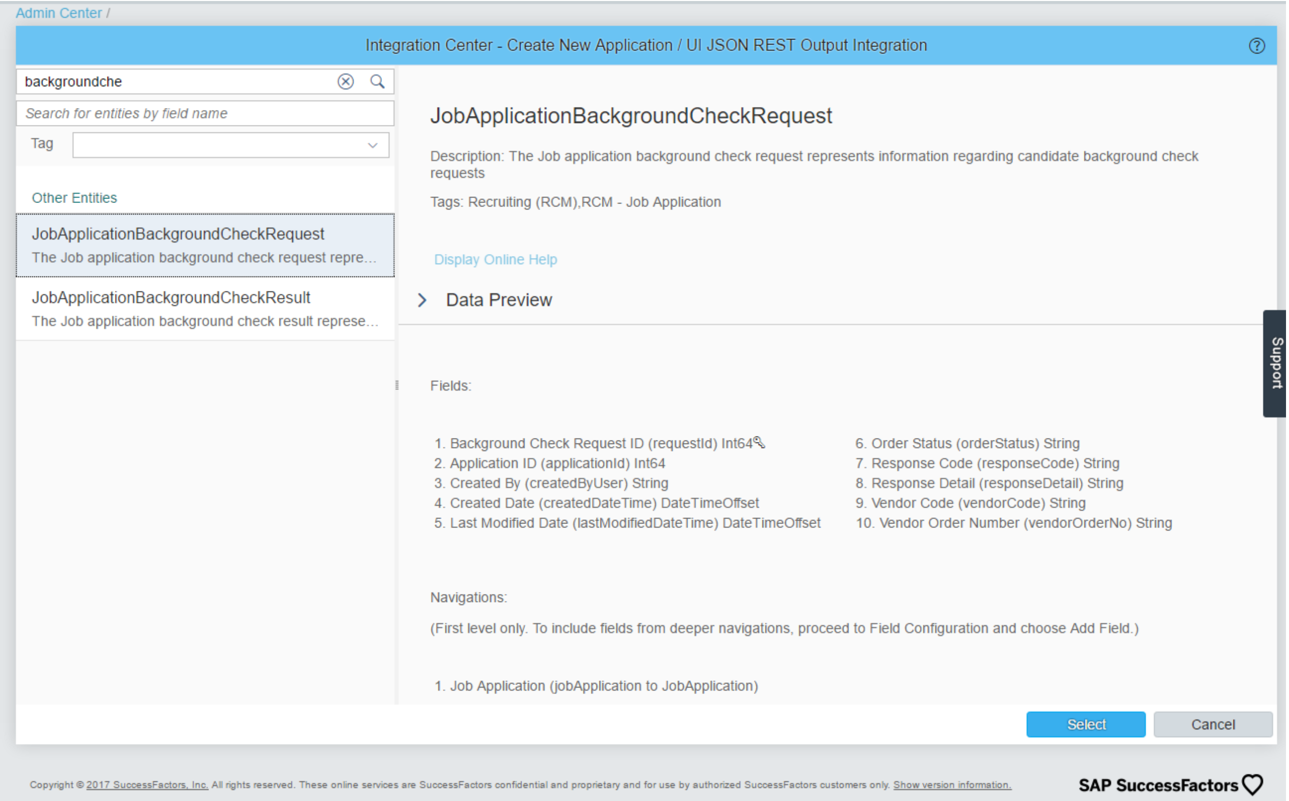

Figure 19: Defining the Starting OData API Entity for the Integration

Define the Integration Center Integration Template

To define an integration center template and make it compatible with the “Background Check with a Custom Vendor” functionality, the tabs that appear on the following screen need to be set up (Figure 20). To do this, please refer to previous sections of this document. The tabs that need to be set-up here are the same as the tabs we used to modify the existing, pre-delivered sample integration center definition.

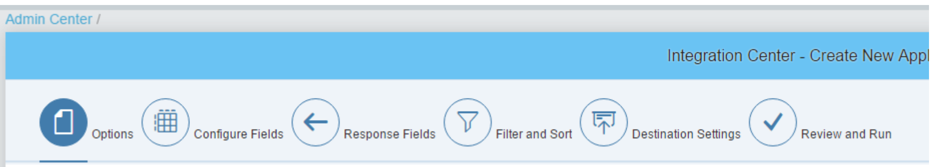

Figure 20: Defining an Integration Definition from Scratch

Important Note.
Please refer to the instructions in the previous sections to get a high-level overview of what needs to be set up. For deep understanding, please refer to the official Integration Center Guidebook.

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