CertnCentric ↔ SAP SuccessFactors

Integration Guide

certn

Overview....2
Integration setup....2
1. Setup Certn as a background check vendor....3
2. Create a dedicated CERTN API user in SAP SuccessFactors for Certn....4
3. Setup a Group for the Dedicated Certn API user....6
4. Setup permissions and assign to the Group....10
5. Register the Certn application in SAP SuccessFactors and generate the API key....14
6. Setup the SAP SuccessFactors integration in the Certn client portal....18
7. Setup the Certn integration in SAP SuccessFactors....26
8. Assign the integration to the Certn vendor in SAP SuccessFactors....30
9. Create background check packages and groups in SAP SuccessFactors....31
    9.1. Retrieve the packages unique IDs from Centric platform....32
    9.2. Create a package picklist....33
    9.3. Retrieve the groups unique IDs from Centric platform....35
    9.4. Create a Group picklist....36
10. Add your picklists to your job requisition....38
11. Provide the appropriate role-based permissions to your recruiters....40
12. Add a background check stage into your talent pipeline....43
13. Initiate a background check....44
14. View background check status and results....46
15. What do the background check statuses mean....48
FAQS....50
Appendix A: Request Payload field mapping....50
Appendix B: Response Payload field mapping....51

Overview

As part of the SuccessFactors Recruiting Management (RCM) module, clients have the ability to integrate with a third-party vendor to trigger a background check via the Recruiting Module. The recruiting operators can then:

- Select the background check package to be triggered
- Initiate the background check
- View background check status
- View background check results in the background check portlet within the application

This deployment guide is intended for use by the system implementer and guides you through the setup. We strongly recommend using Certn's and SuccessFactors' sandbox environments to test the integration prior to setting it up in production.

Integration setup

This section is for system implementers.

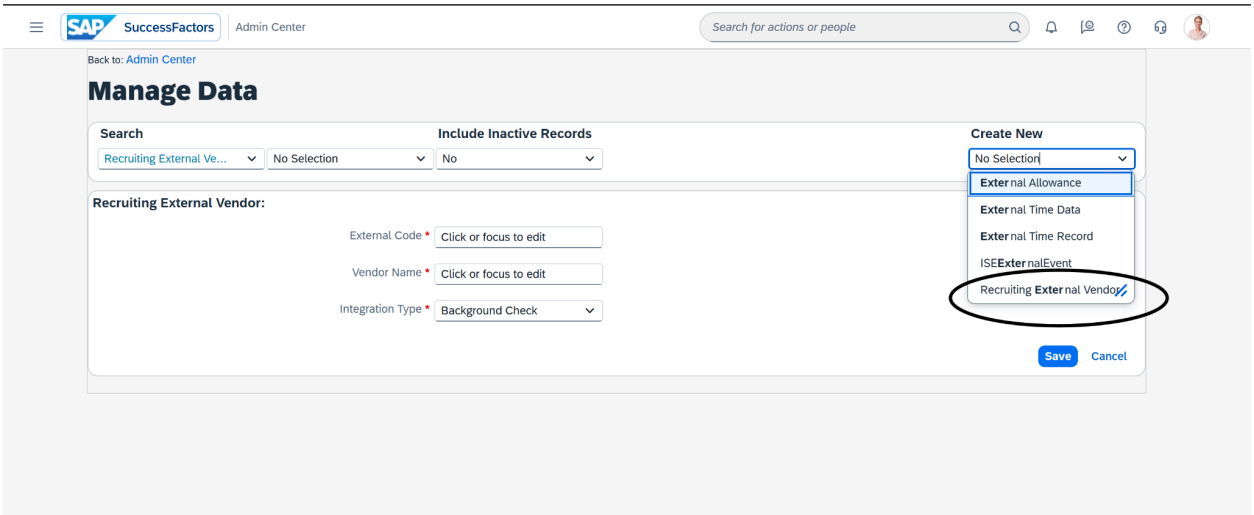
SuccessFactors RCM supports sending background check requests to vendors and receiving updates for background check statuses and results. This requires you to

- Setup Certn as a background check vendor.
- Create a dedicated CERTN API user in SAP SuccessFactors for Certn.
- Register the Certn application in SAP SuccessFactors and generate the API key.
- Setup the SAP SuccessFactors integration in the Certn client portal.
- Setup the Certn integration in SAP SuccessFactors.
- Assign the integration to the Certn vendor in SAP SuccessFactors.
- Create background check packages and groups in SAP SuccessFactors.
- Provide the appropriate role-based permissions to your recruiters.

1. Setup Certn as a background check vendor

1.1. Go to Admin Center → Manage Data.

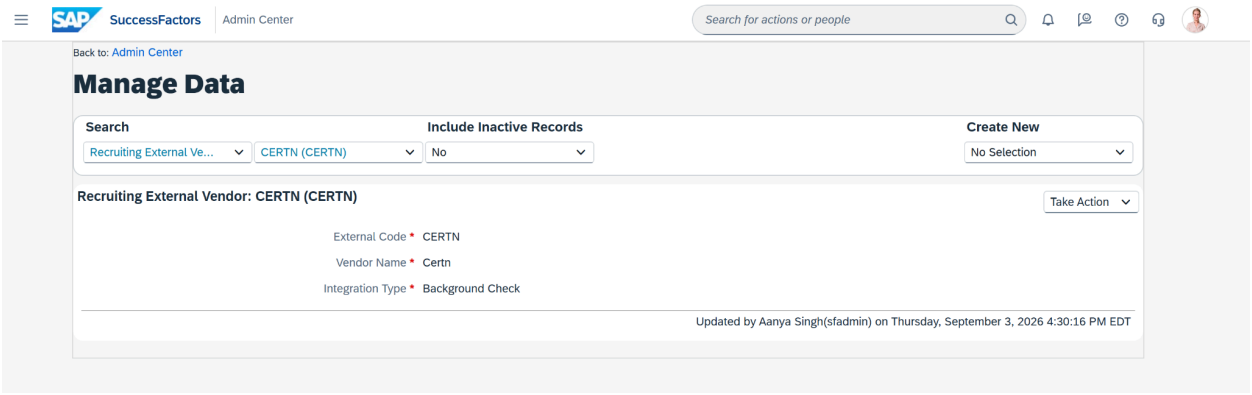
1.2. In the “Create New” dropdown field, select “Recruiting External Vendor”.



1.3. Enter the External Code as “CERTN”, the Vendor Name as “CERTN”, and select “Background Check” from the “Integration Type” dropdown.

1.4. Click Save.

If you want to review the information you entered, select “Recruiting External Vendor” from the “Search” dropdown, and then select the newly created vendor from the second dropdown.



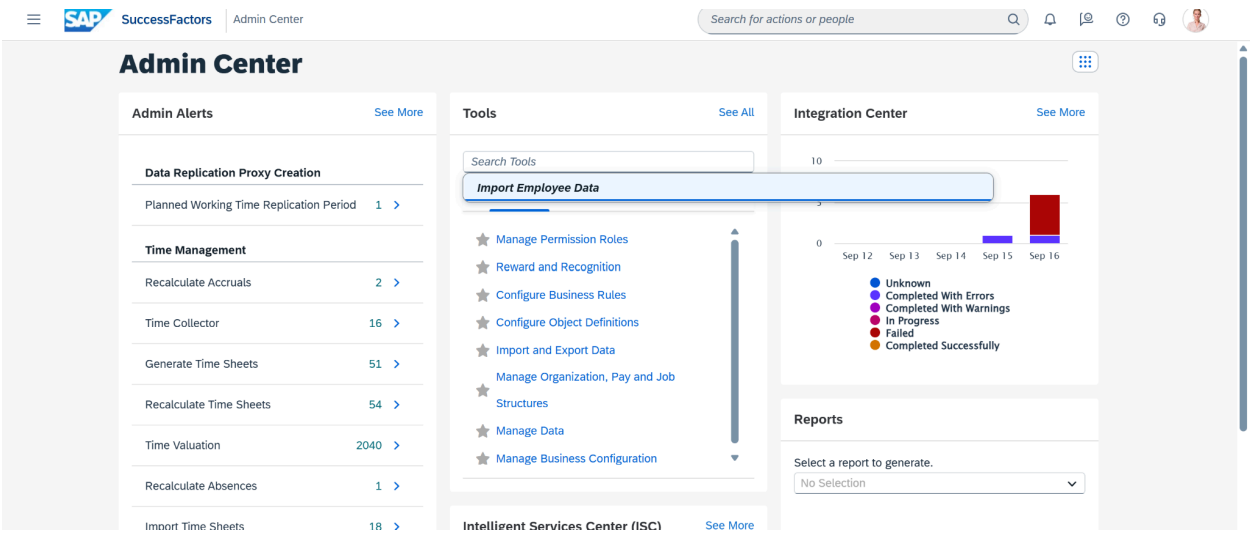
Note: Make sure the External Code has the value “CERTN”.

2. Create a dedicated CERTN API user in SAP SuccessFactors for Certn

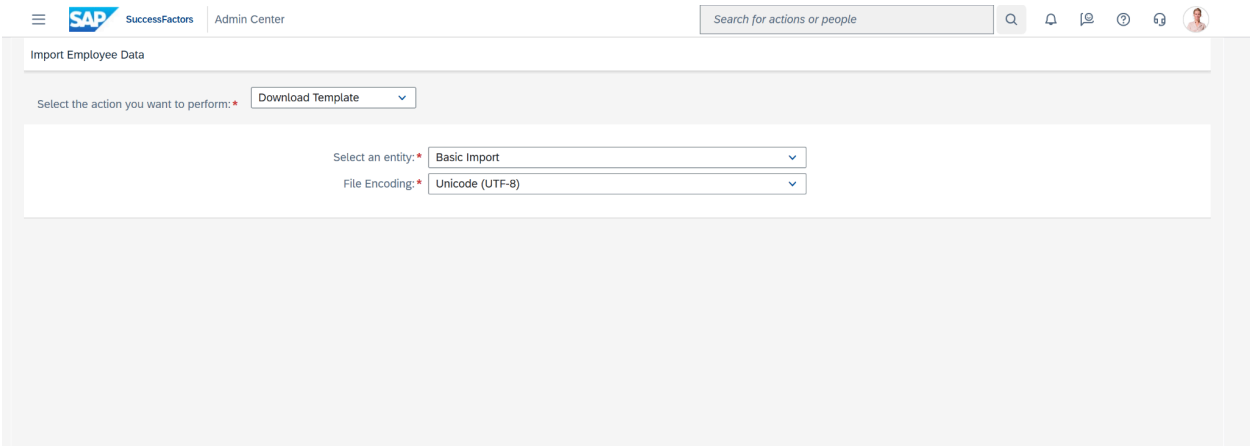
To authorise the Certn Centric platform to update the status or results of the background checks ordered via SAP , create a dedicated api user in the SAP SuccessFactors.

2.1. In SuccessFactors, go to “Admin Center”.

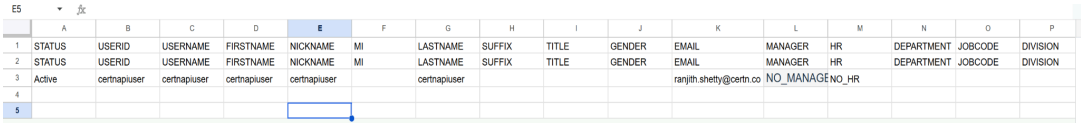
2.2. Search and select “Import Employee Data” from the “Tools” group.



2.3. Select Download Template and select entity as “Basic Import”.



2.4. Open the csv template in excel or google sheets.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	STATUS	USERID	USERNAME	FIRSTNAME	NICKNAME	MI	LASTNAME	SUFFIX	TITLE	GENDER	EMAIL	MANAGER	HR	DEPARTMENT	JOBCODE	DIVISION
2	STATUS	USERID	USERNAME	FIRSTNAME	NICKNAME	MI	LASTNAME	SUFFIX	TITLE	GENDER	EMAIL	MANAGER	HR	DEPARTMENT	JOBCODE	DIVISION
3	Active	certnapiuser	certnapiuser	certnapiuser	certnapiuser		certnapiuser				ranjith.shetty@certn.co	NO_MANAGE	NO_HR			
4																
5																

2.5. Fill in the below data.

2.5.1. Status → Active

2.5.2. USERID → certn_api (can be any value. Make a note of the user id as you will need it later)

2.5.3. USERNAME → certn_api (can be any value)

2.5.4. FIRSTNAME: Certn (can be any value)

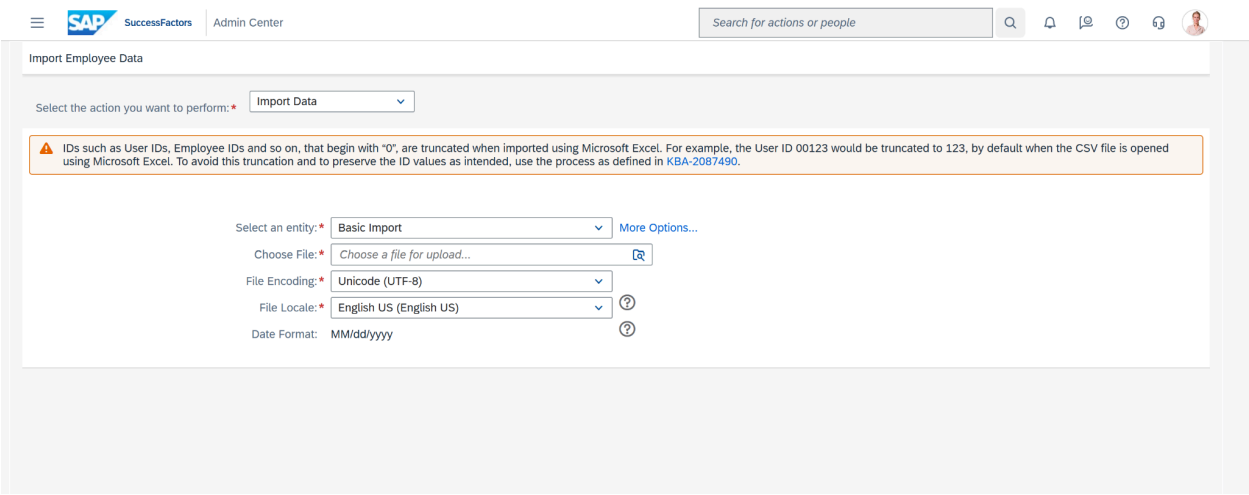
2.5.5. LASTNAME: Integration (can be any value)

2.5.6. ASSIGNMENT_ID_EXTERNAL → certn_api (can be any value)

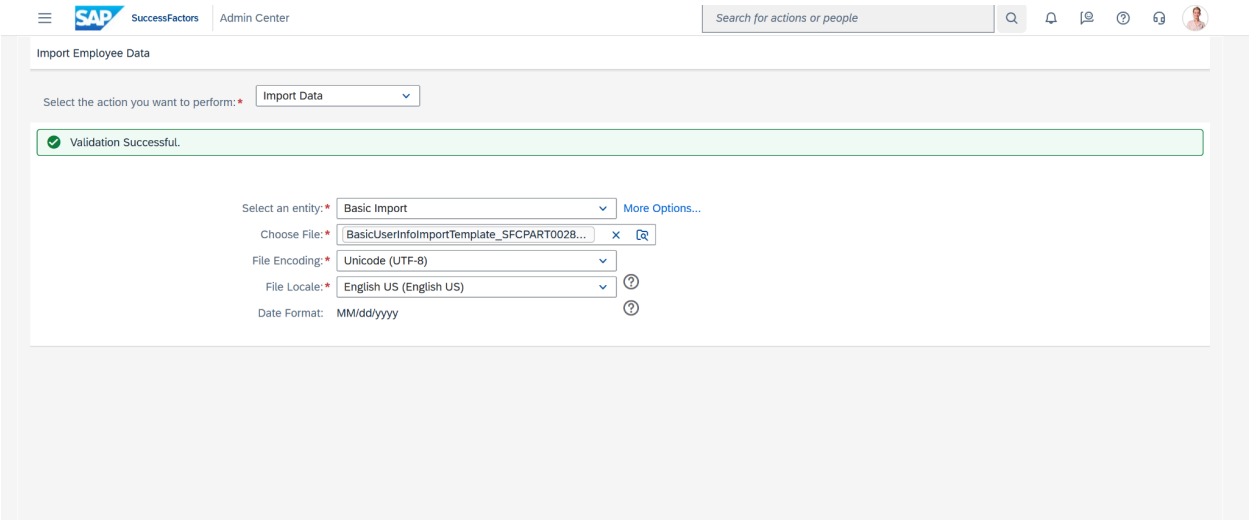
2.5.7. MANAGER → NO_MANAGER

2.5.8. HR → NO_HR

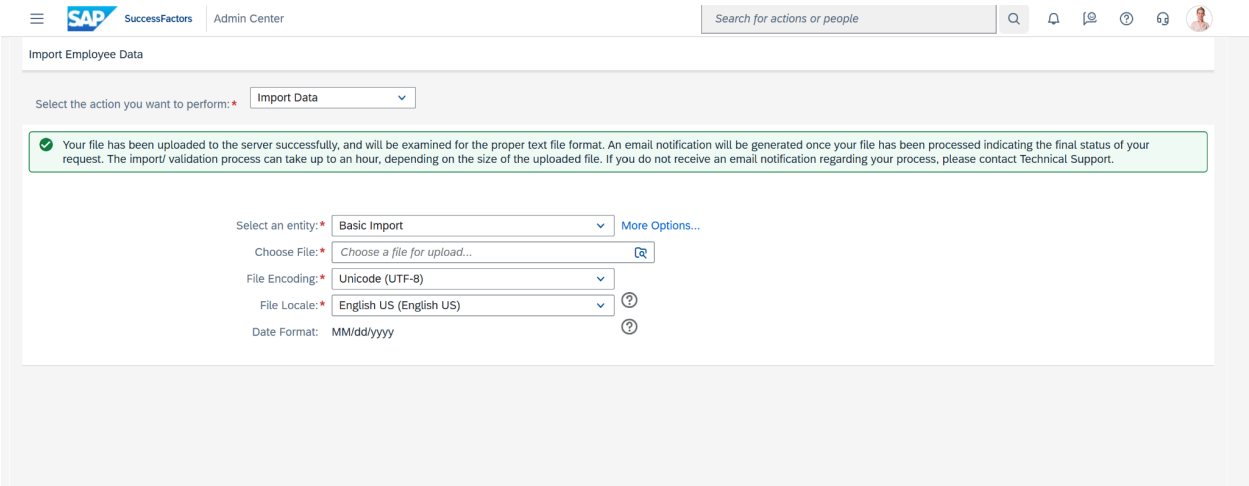
2.5.9. Select “Import Data” and select entity as “Basic Import”



2.6. Upload the csv and click “Validate Import File Data”. Make sure you receive a “Validation Successful” message. If not, please review your file.



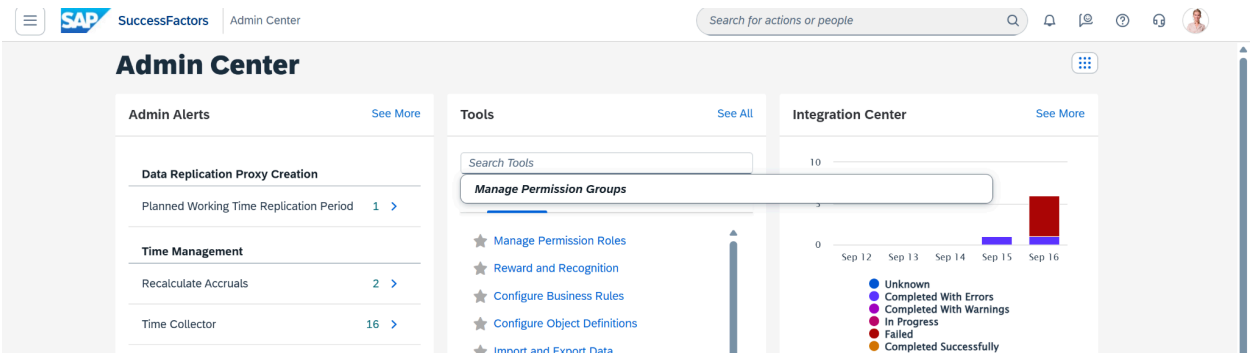
2.7. Click on “Import”. Make sure you receive a “Validation Successful” message. If you do not get a successful message, please review your file or contact your SAP administrator.



3. Setup a Group for the Dedicated Certn API user

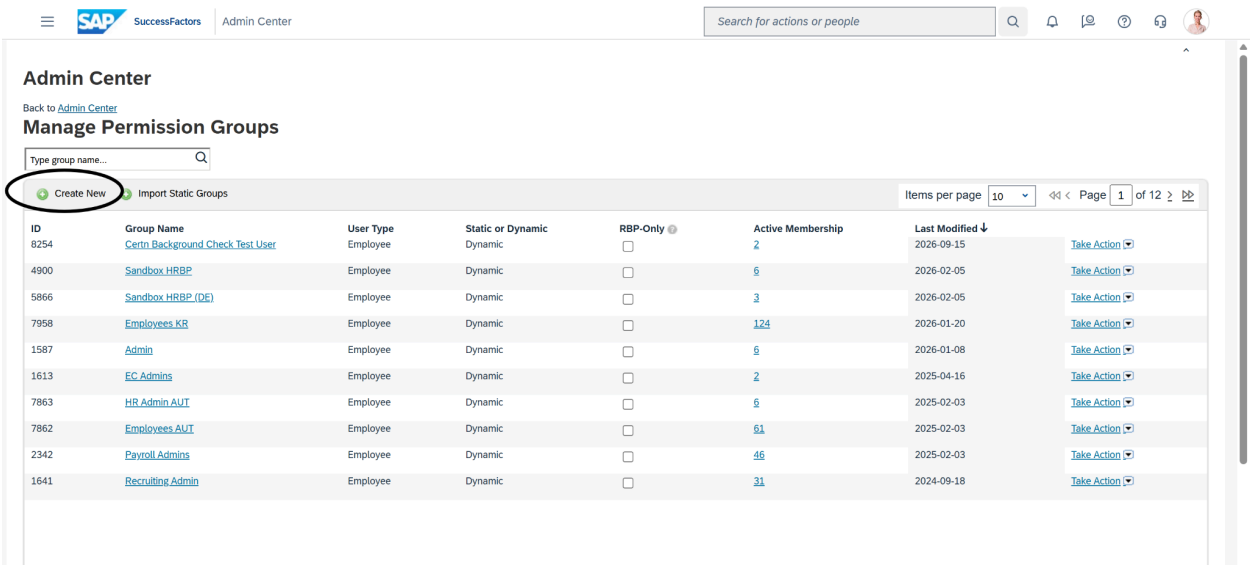
3.1. In SuccessFactors, go to “Admin Center”.

3.2. Search and select “Manage Permission Groups” from the “Tools” group.



3.3. Search and select “Manage Permission Groups” from the “Tools” group.

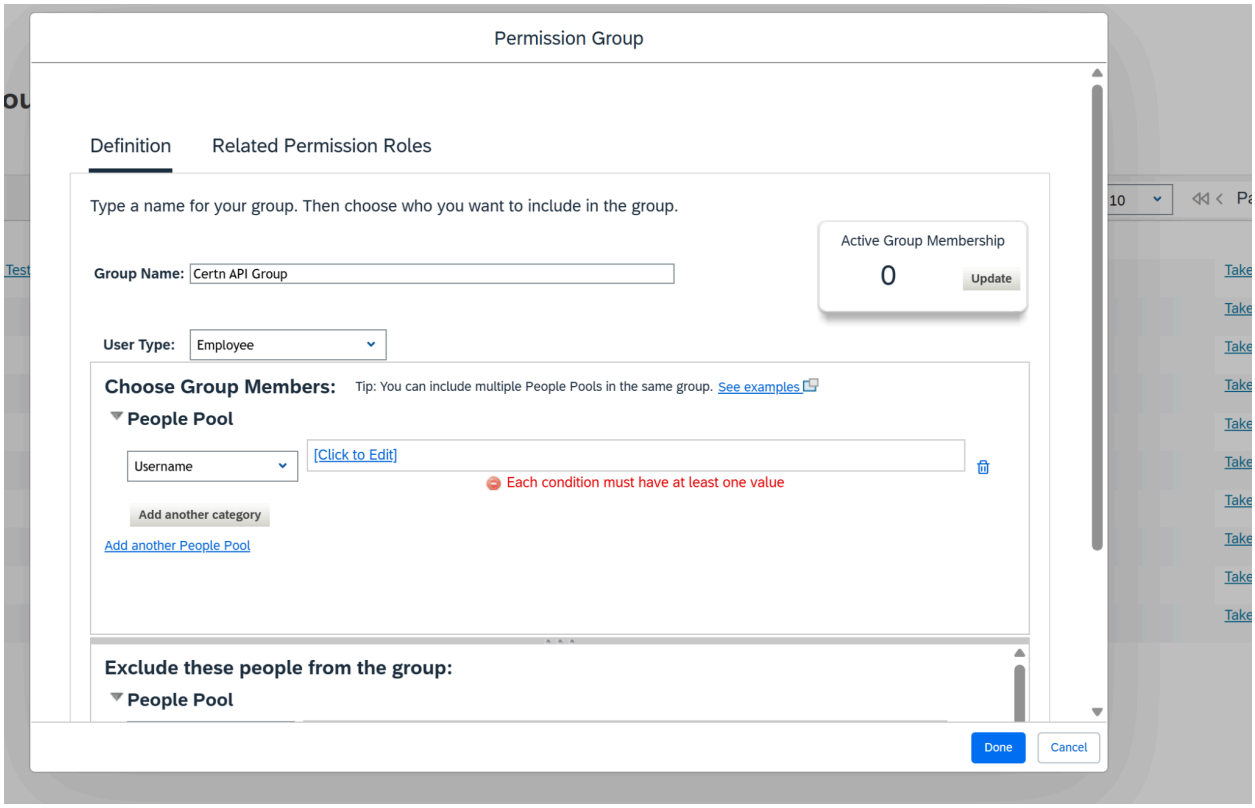
3.4. Click on “Create New”.



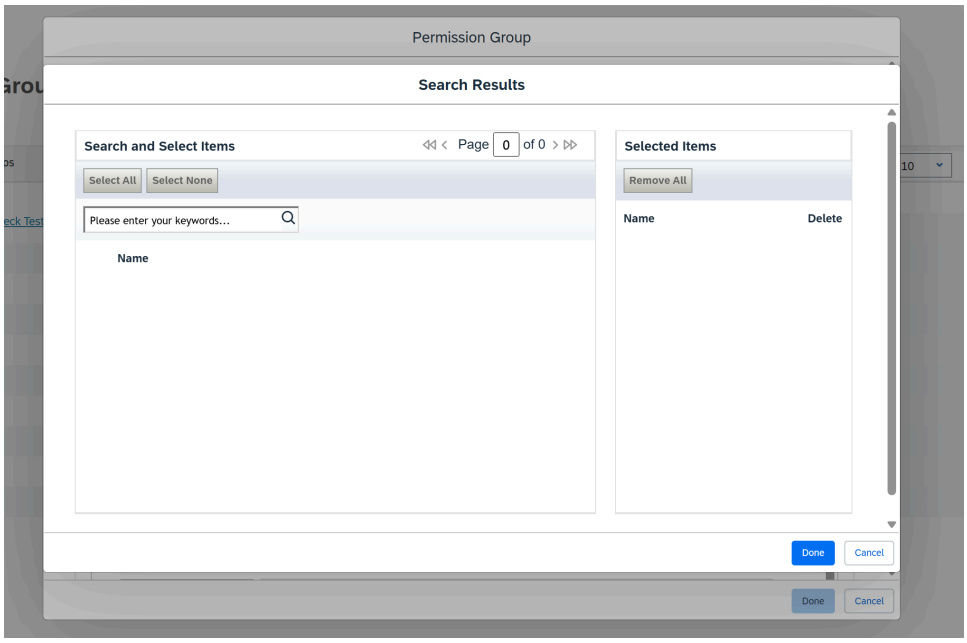
3.5. Enter the below details.

3.5.1. Group Name - Certn API Group (this can be any value).

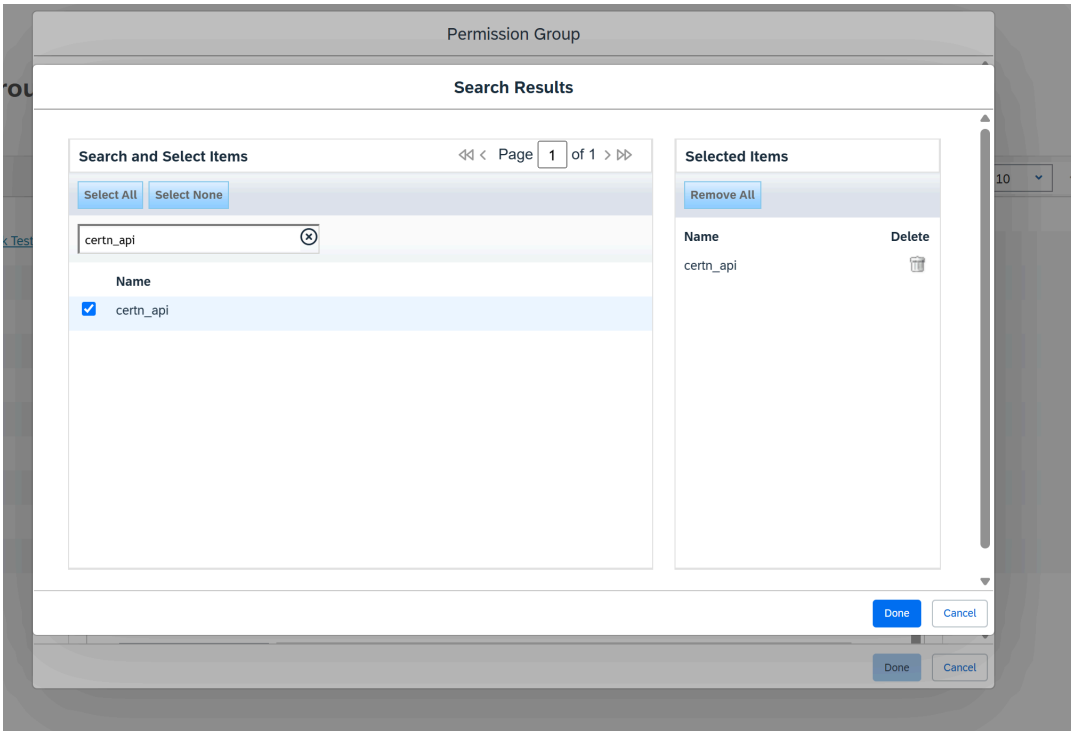
3.5.2. Under the “people pool” select “Username” option and add the user you created in step 2.



3.6. Select “Click to Edit”.



3.7. Enter the user you created in Step 2 and add the user to the group.

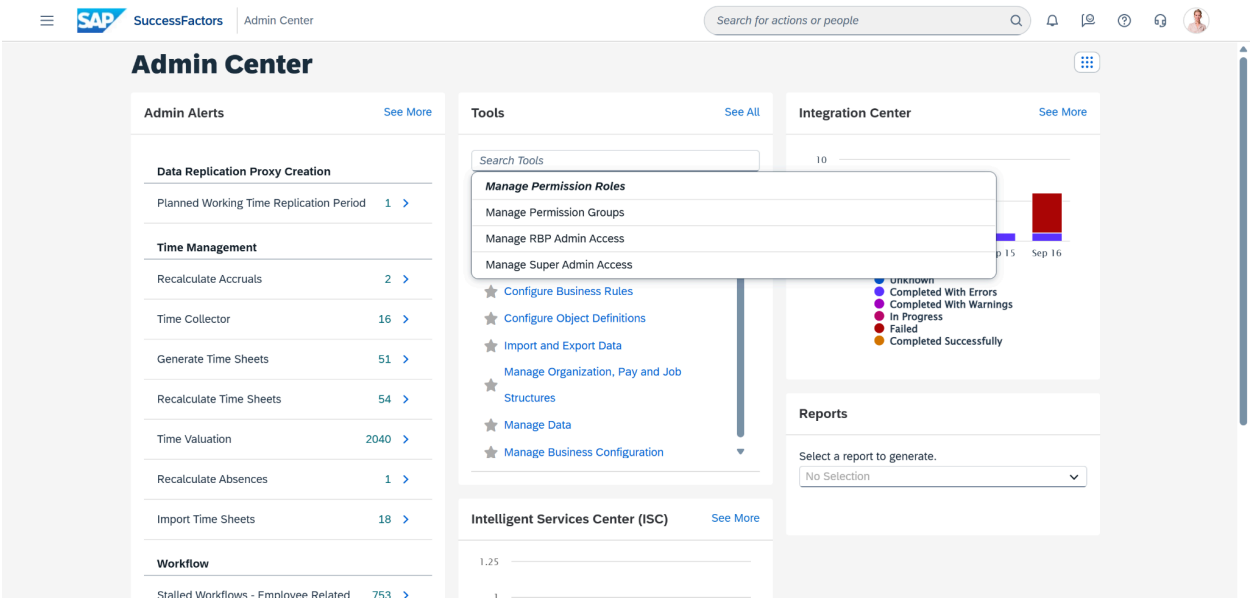


3.8. Click “Done”.

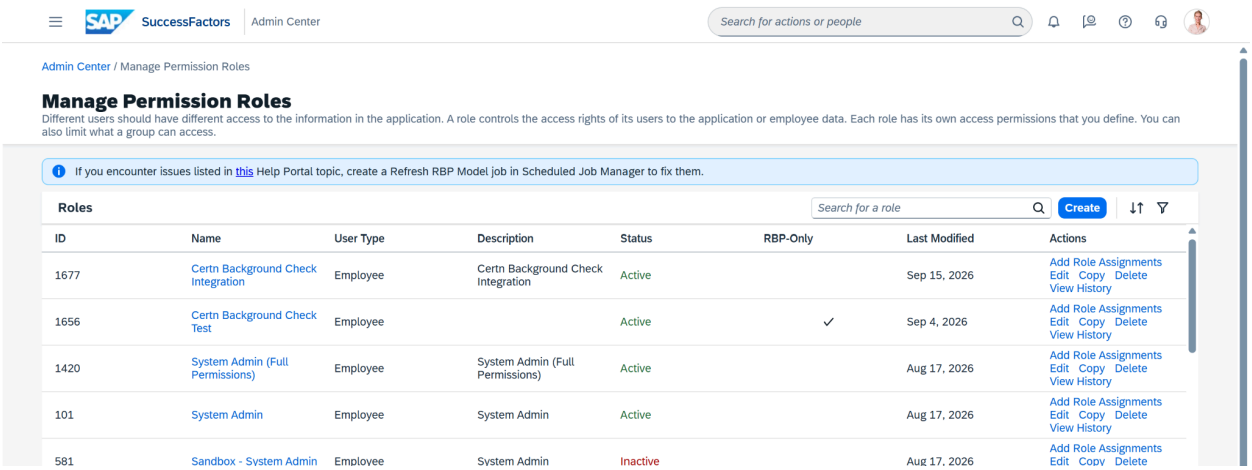
4. Setup permissions and assign to the Group

4.1. In SAP SuccessFactors, go to “Admin Center”.

4.2. Search and select “Manage Permission Roles” from the “Tools” group.

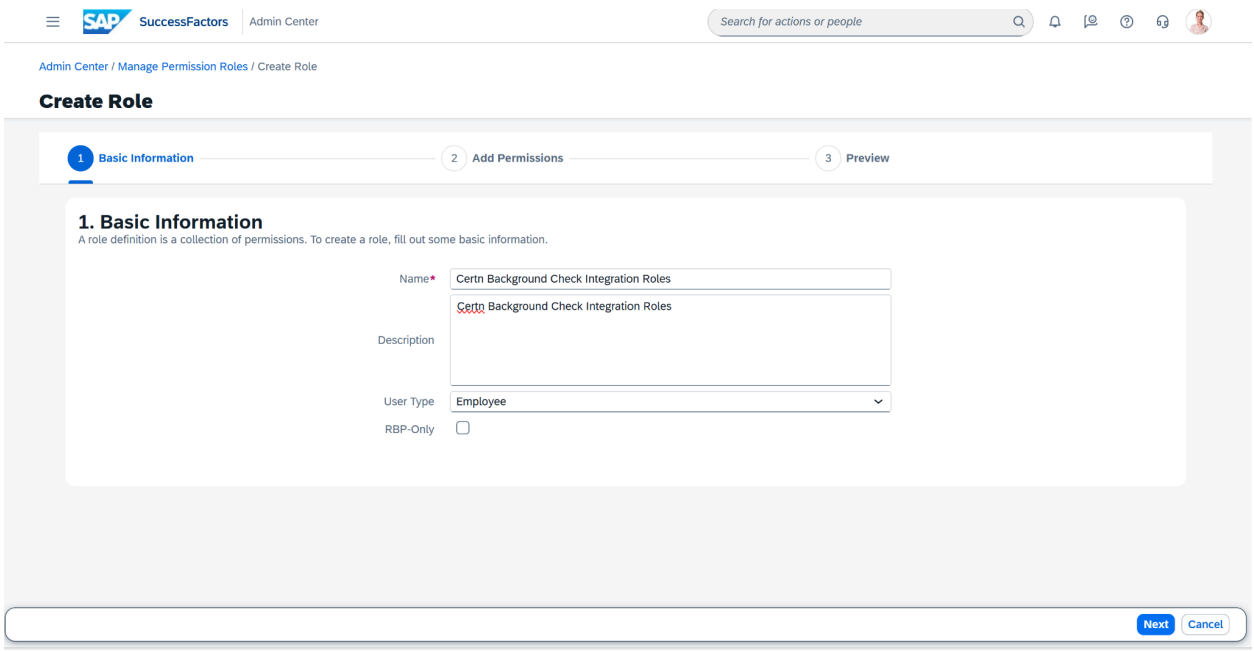


4.3. Click “Create New”.

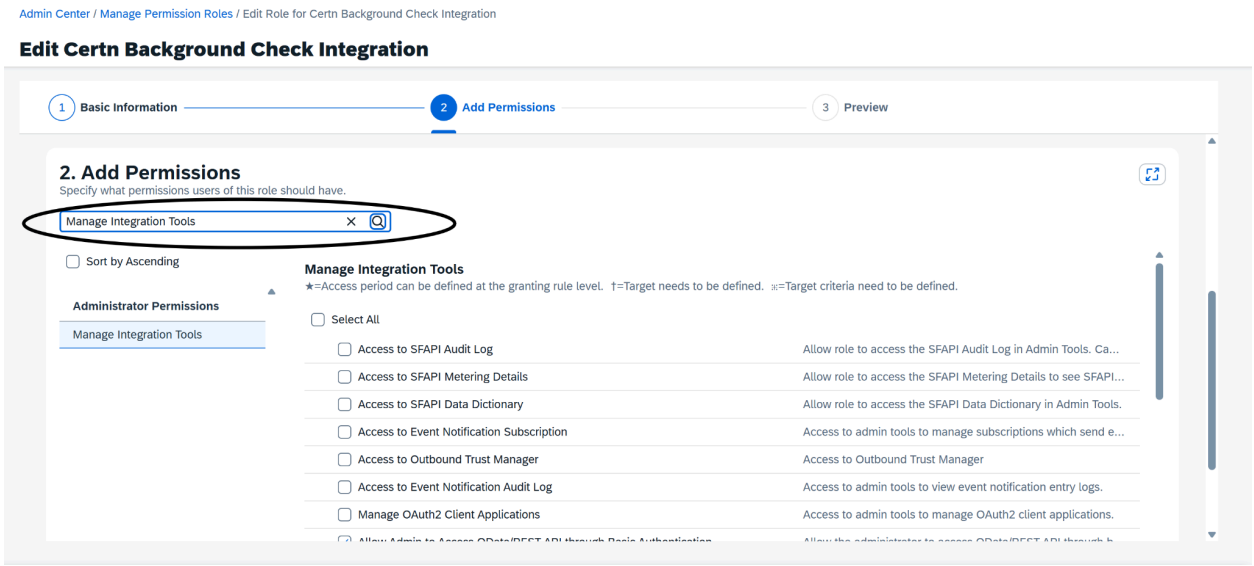


4.4. Enter the below values and click “Next”.

4.4.1. Name - Certn Background Check Integration Roles



4.5. Enter “Manage Integration Tools” permission in the field below:



4.6. Add the below permissions:

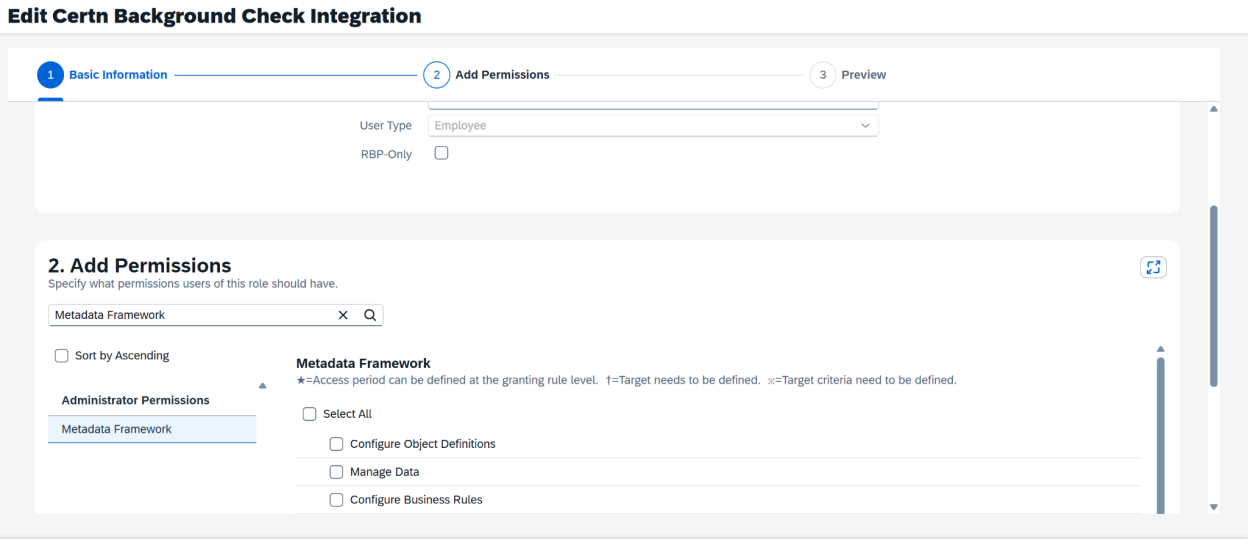
4.6.1. Allow Admin to Access OData API through Basic Authentication

4.6.2. Allow users to execute “Application/UI” or “Event-based” Integrations

4.6.3. Access to Integration Center

4.6.4. Access to OData API Data Dictionary

4.7. Enter “Metadata Framework” permission in the field below:



4.8. Add the below permissions:

4.8.1. Admin access to MDF OData API

4.8.2. Access to non-secured objects

4.9. Enter “Recruiting Permissions” permission in the field below:

4.9.1. Add the below permissions:

4.9.1.1. Background Check Initiate Permission

4.9.1.2. Background Check Update Permission

4.9.1.3. OData API Application Export

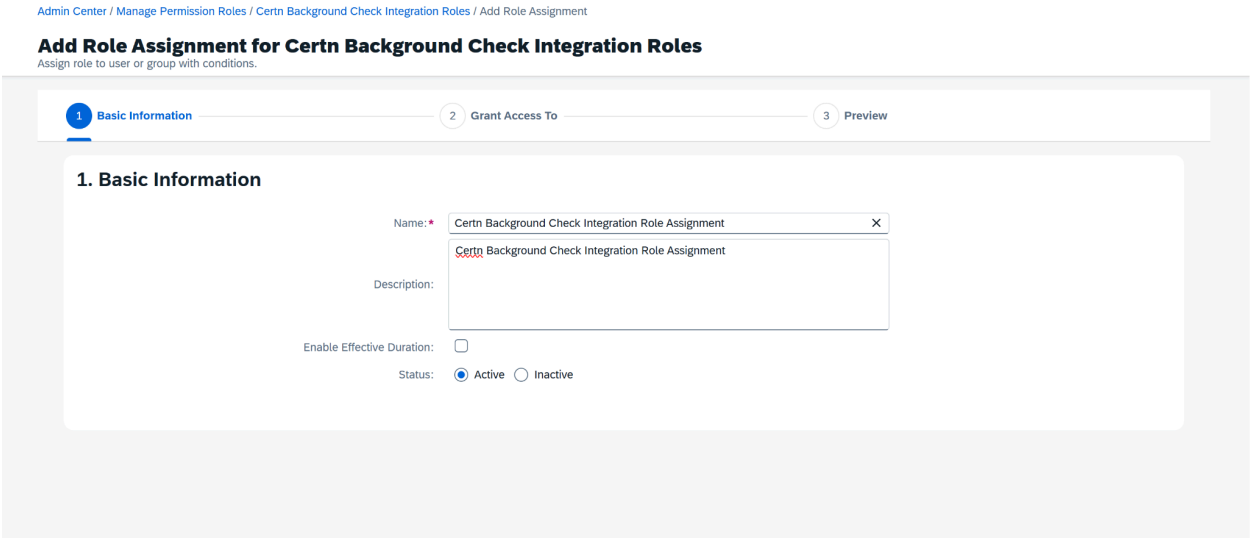
4.9.1.4. OData API Application Create

4.9.1.5. OData API Application Update

4.9.1.6. OData API Candidate Export

4.9.1.7. OData API Job Requisition Export

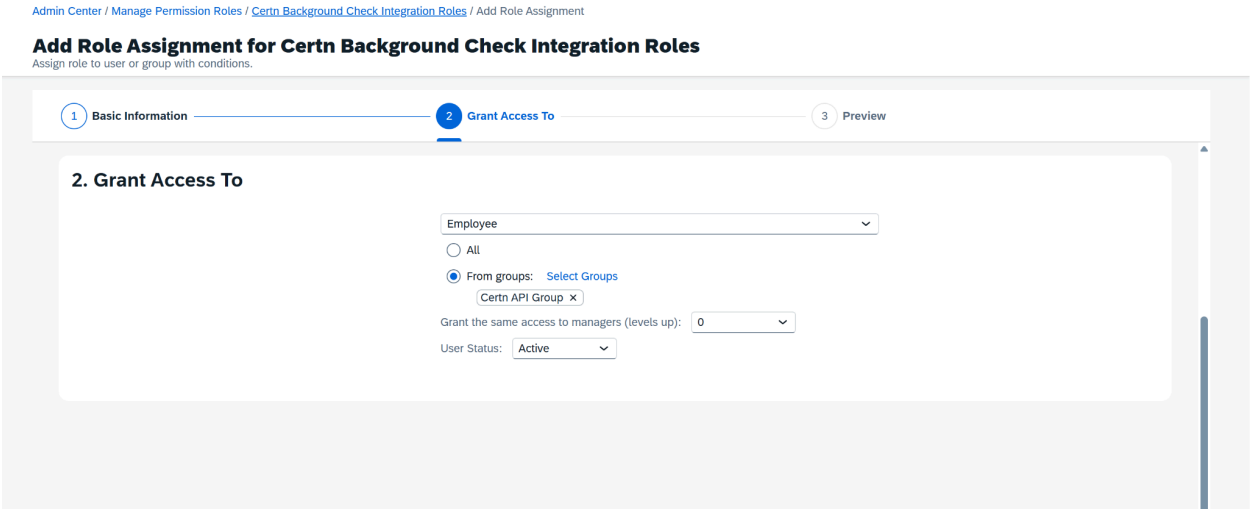
4.10. Click “Done”. The system will prompt you continue to role assignment.



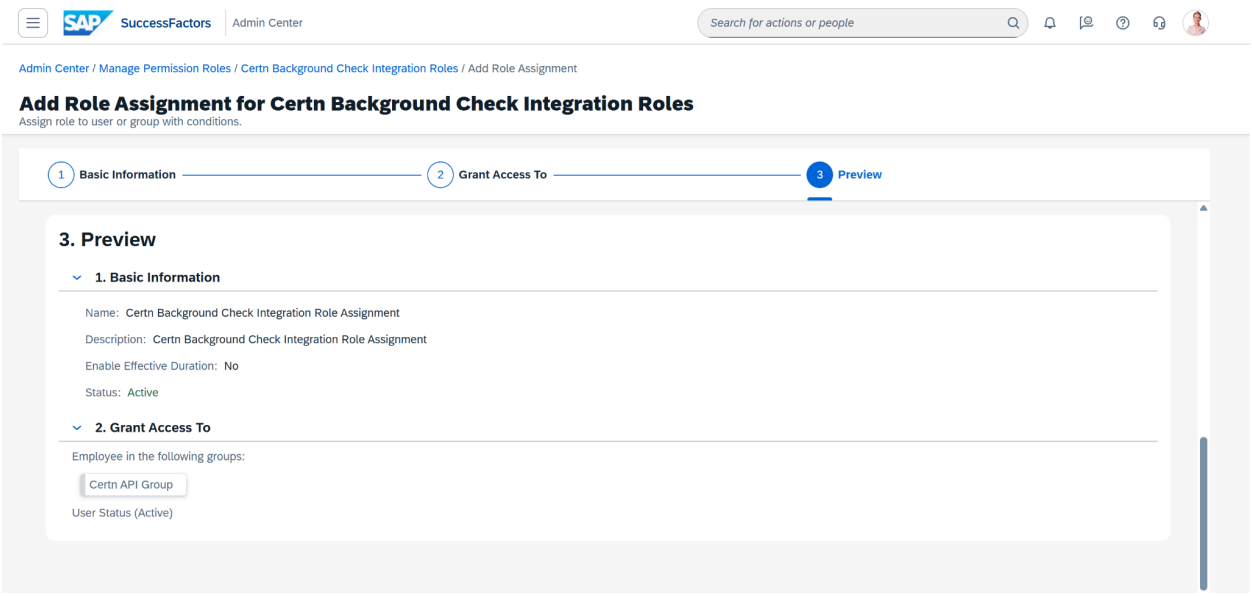
4.11. Enter the below values and click “Next”.

4.11.1. Name - Certn Background Check Integration Role Assignment

4.12. Select the group you created in Step 3 <“Cert API Group> and click “Next”.



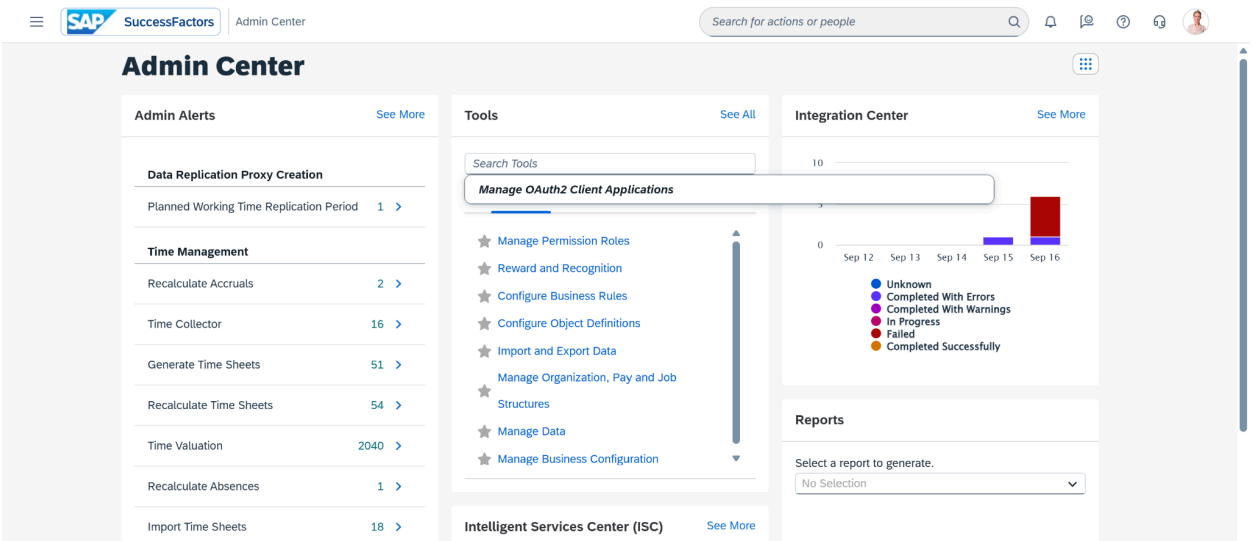
4.13. Review and save.



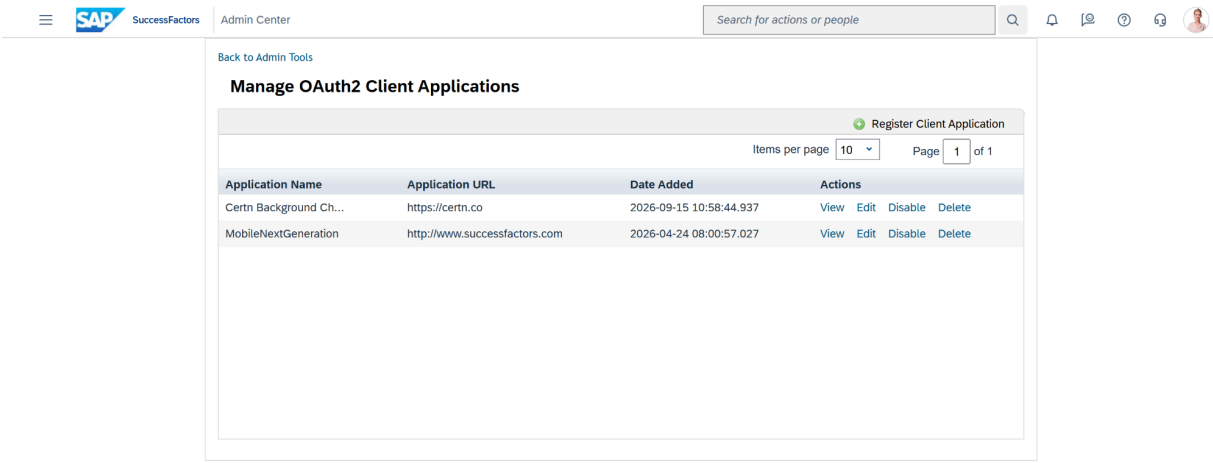
5. Register the Certn application in SAP SuccessFactors and generate the API key

5.1. In SAP SuccessFactors, go to “Admin Center”.

5.2. Search and select “Manage OAuth2 Client Applications” from the “Tools” group.



5.3. Click on Register Client Application.



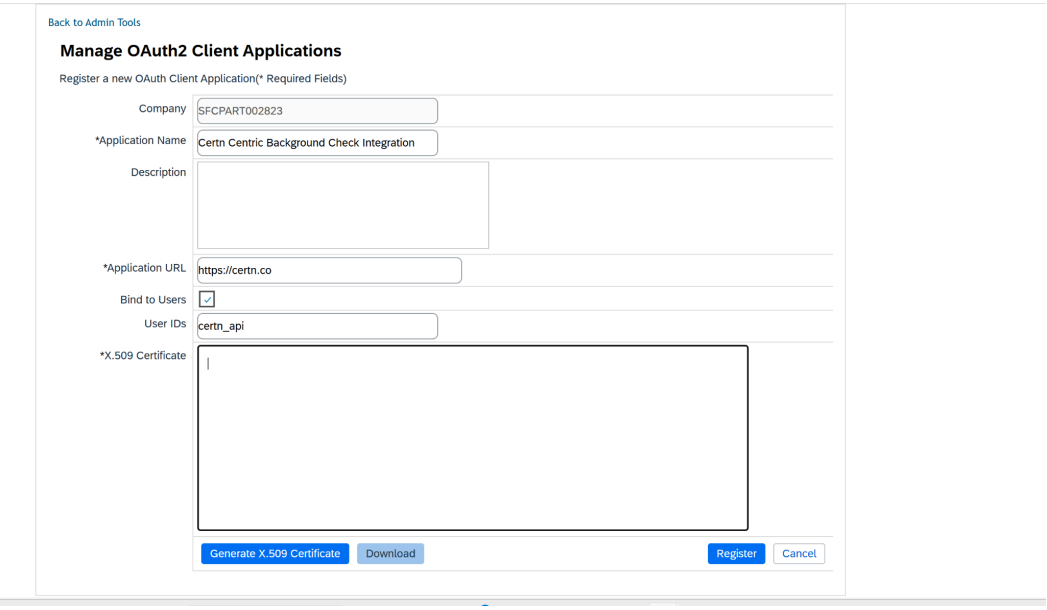
5.4. Enter the below values:

5.4.1. Application Name - Certn Centric Background Check Integration (this can be any value)

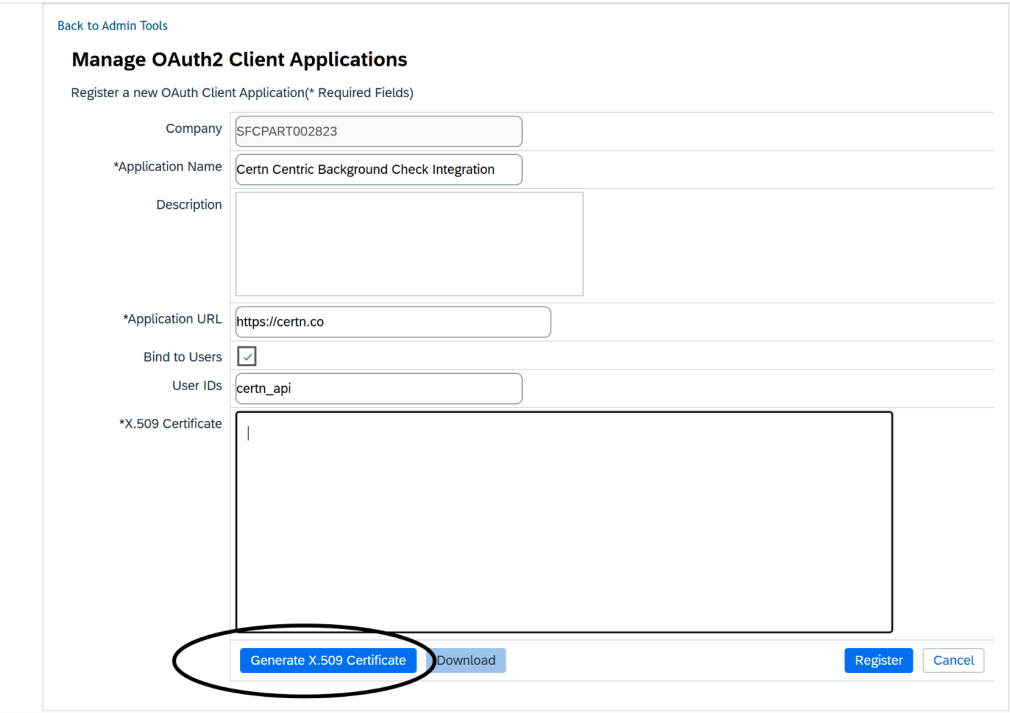
5.4.2. Applicant Url - https://certn.co (This should be the url of your application)

5.4.3. Bind to users - Select this option

5.4.4. User IDS - certn_api (Enter the user id of the user you created in Step 2)



5.5. Click on Generate *X.509 Certificate.



5.6. Enter the below values and click “Generate”:

5.6.1. *Common Name(CN) - certn

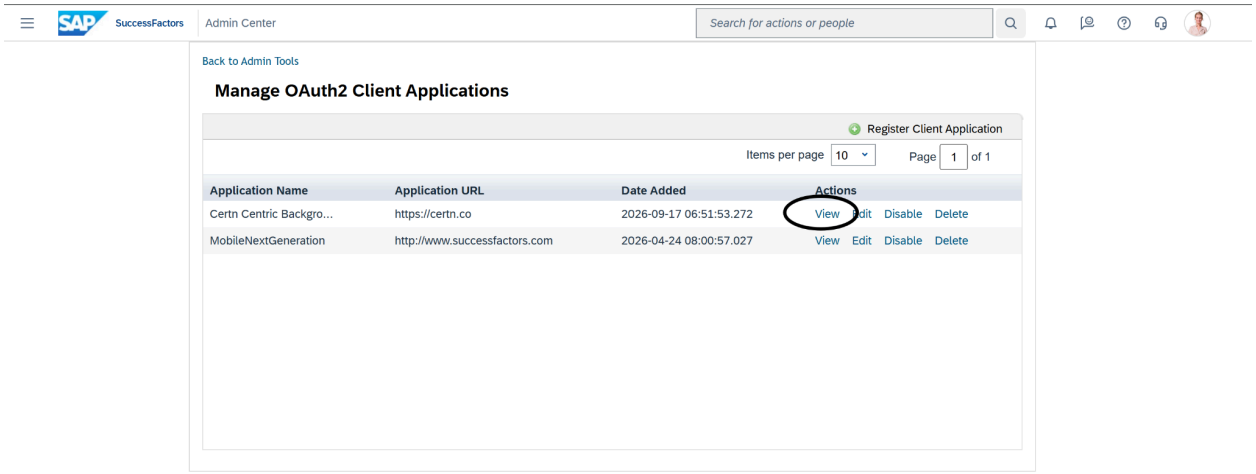
5.6.2. Organization - certn

5.6.3. Validity - 365

5.7. Download the certificate locally and store it. You will need this when you set up the integration in the certn client portal.

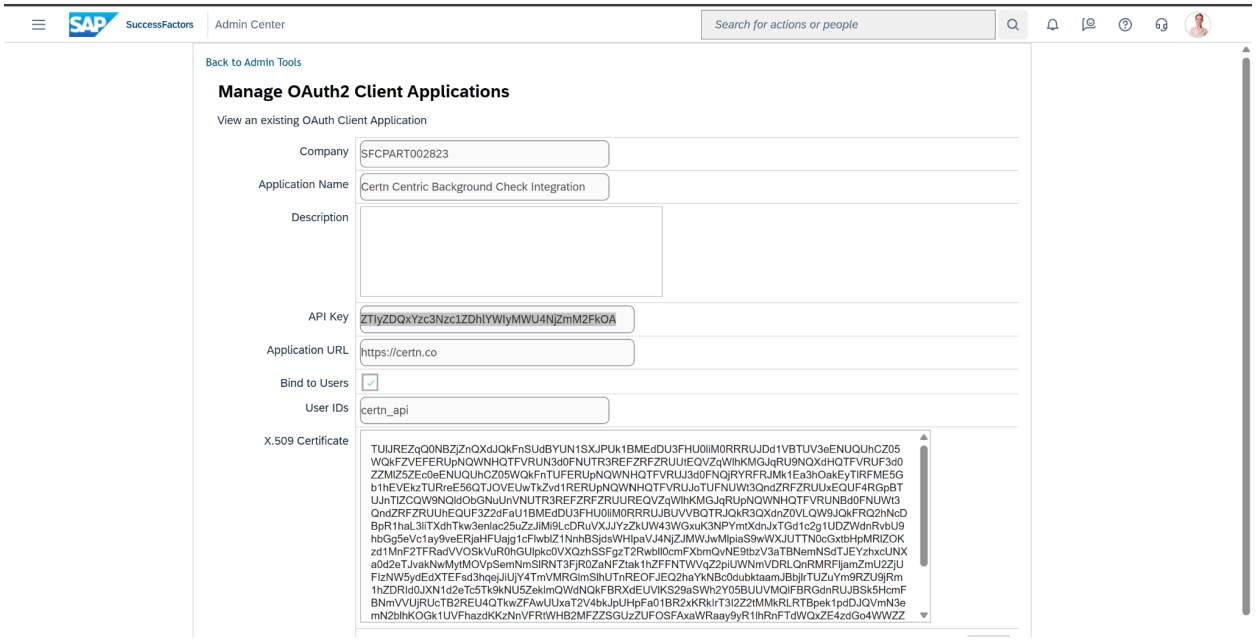
5.8. Click “Register”.

5.9. Click “View” on the newly registered application.



5.10. Click “View” on the newly registered application.

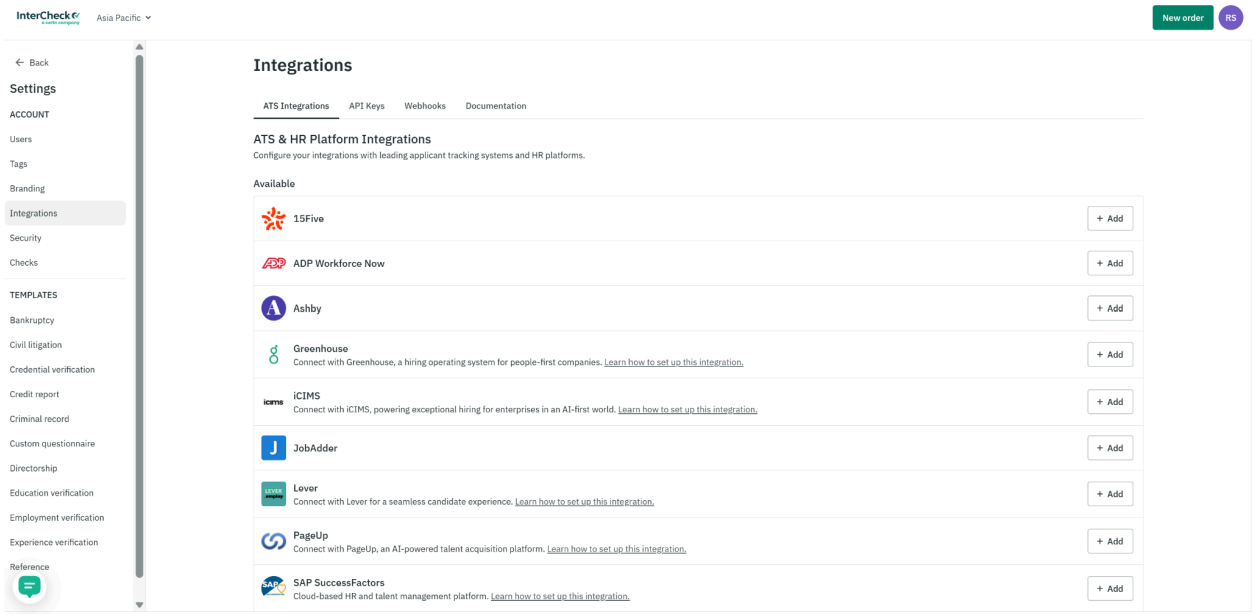
5.11. Copy and save API Key. You will need this when you setup the integration in the certn platform.



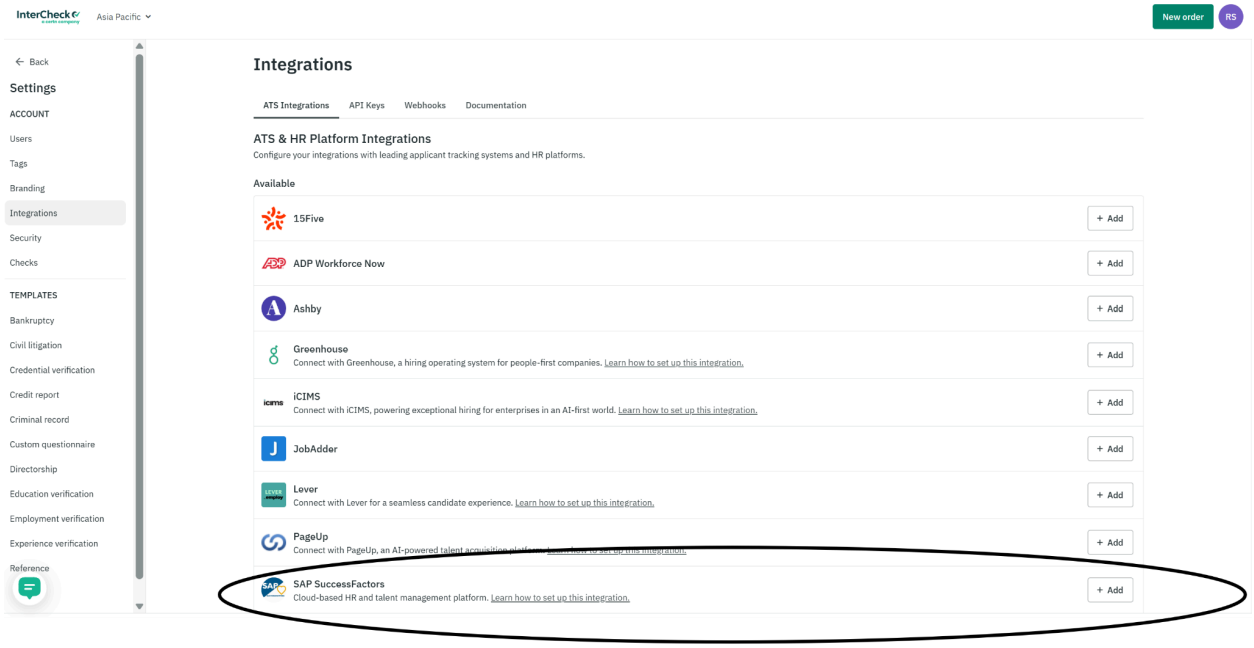
6. Setup the SAP SuccessFactors integration in the Certn client portal

6.1. Login to the Certn Centric portal.

6.2. Navigate to the integration page by clicking on Settings -> Integrations menu.



6.3. Start the SAP SuccessFactors setup by clicking “Add”.



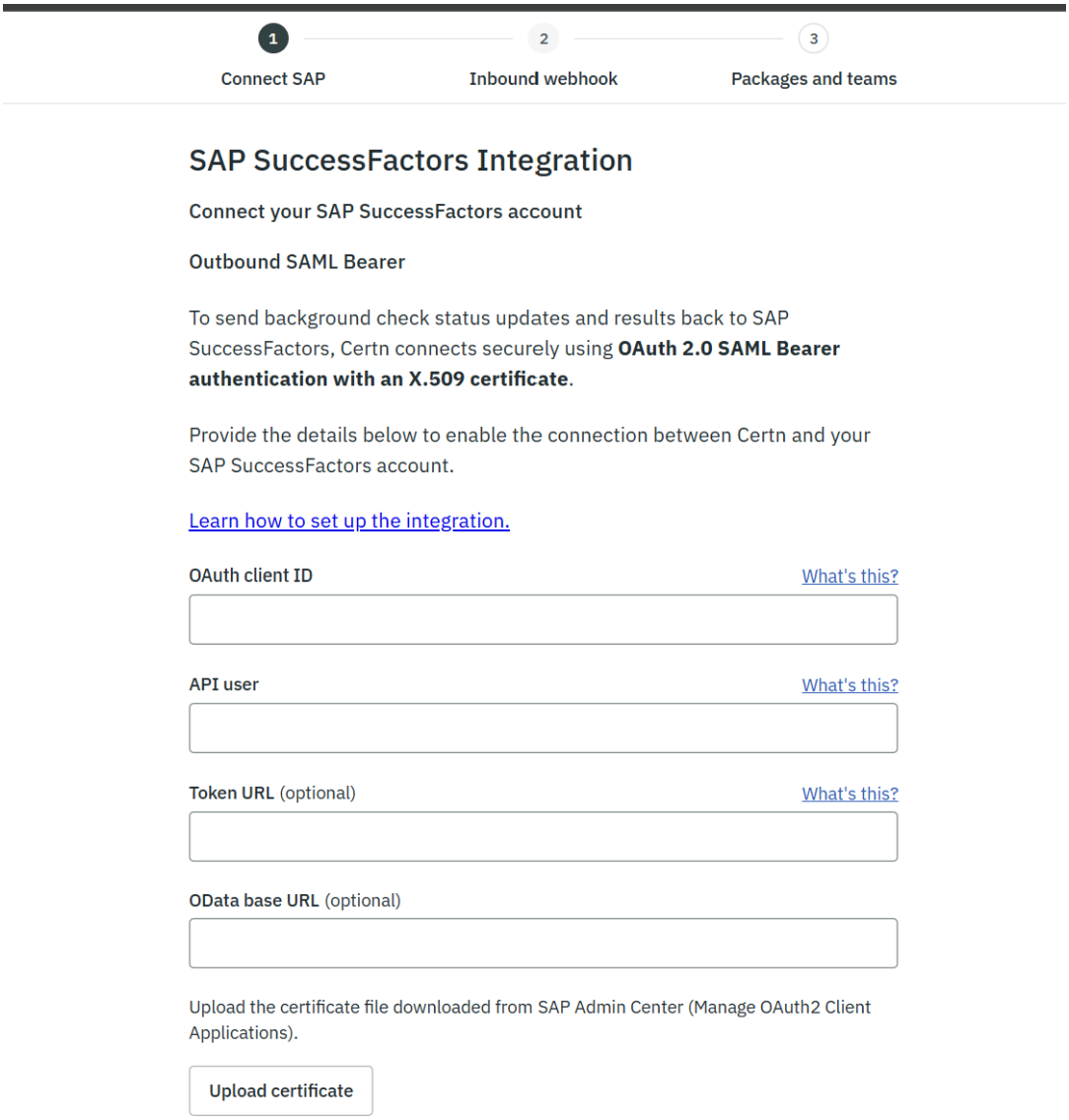
6.4. At Step 1 , enter your SAP SuccessFactors OAuth Details below:

6.4.1. **OAuth client ID** - This is the OAuth API key you generated in Step 5.11

6.4.2. **API User** - This is the API user you generated in Step 1

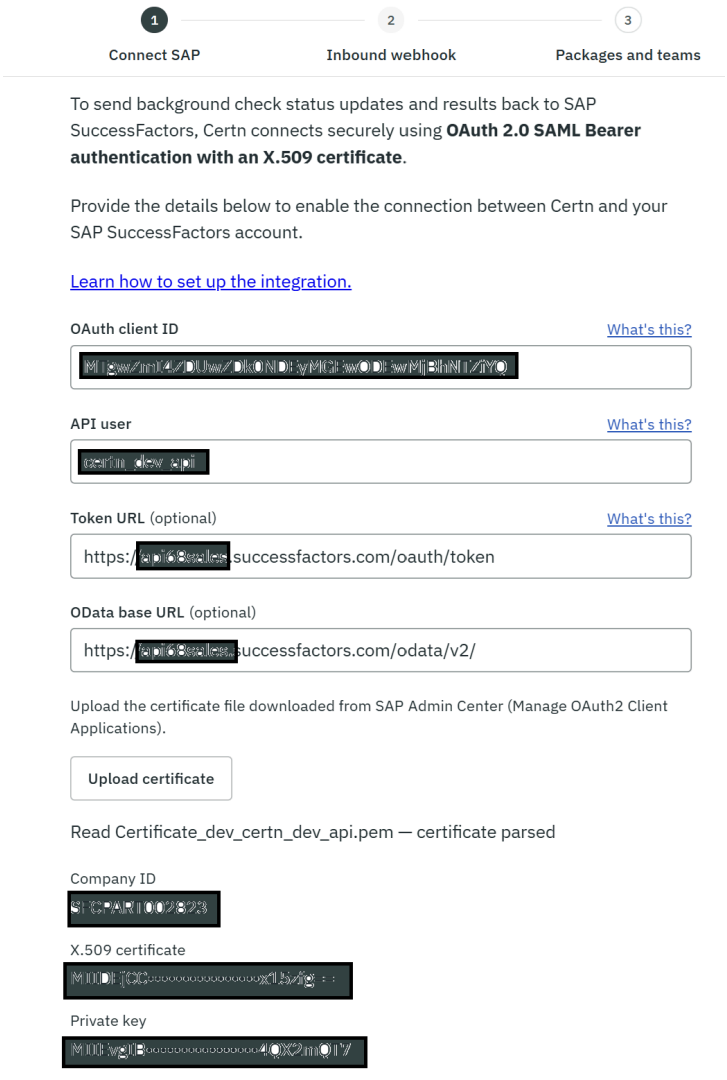
6.4.3. **Token URL** - This is your SAP SuccessFactors token url. Please ask your SAP SuccessFactors administrator

6.4.4. **OData Base URL** - This is your SAP SuccessFactors OData base url. Please ask your SAP SuccessFactors administrator.

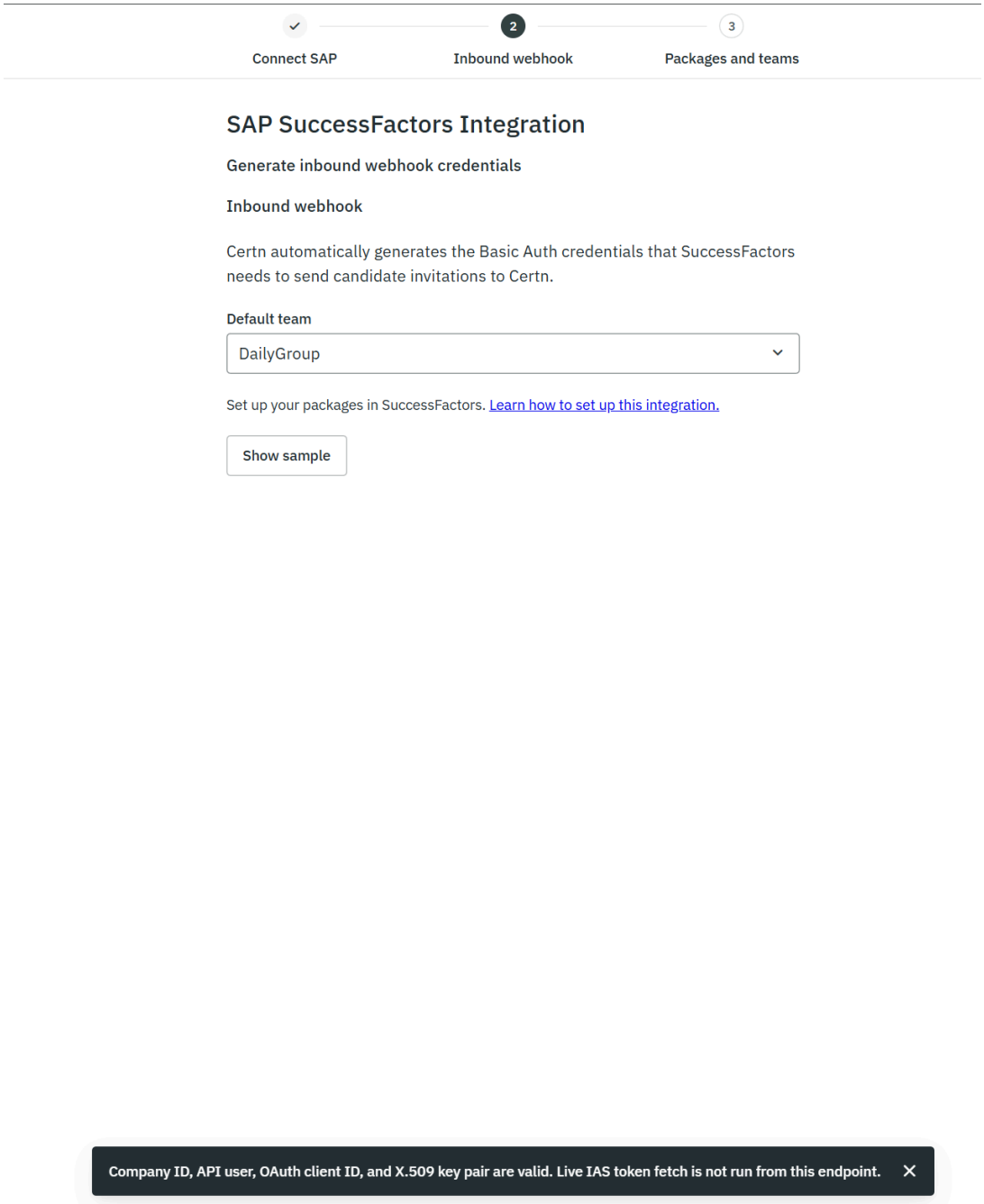


6.4.5. **Upload the Certificate -** Upload the PEM certificate you downloaded in Step 5.7. Once uploaded, the system will retrieve the below data which will be shown to you:

6.4.5.1. Company ID

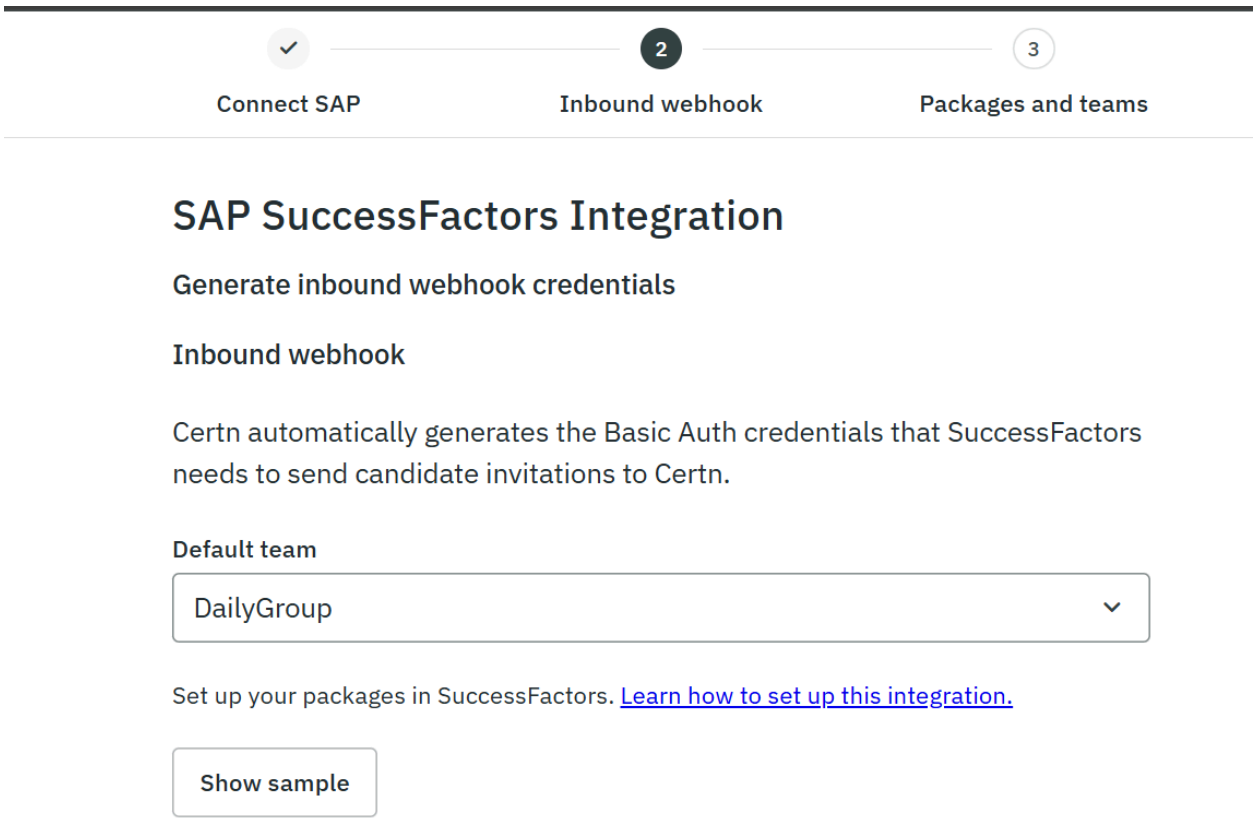


6.4.6. Click “Connect”. If the connection to your SAP SuccessFactors system is successful, you will be taken to Step 2 and shown the below message:

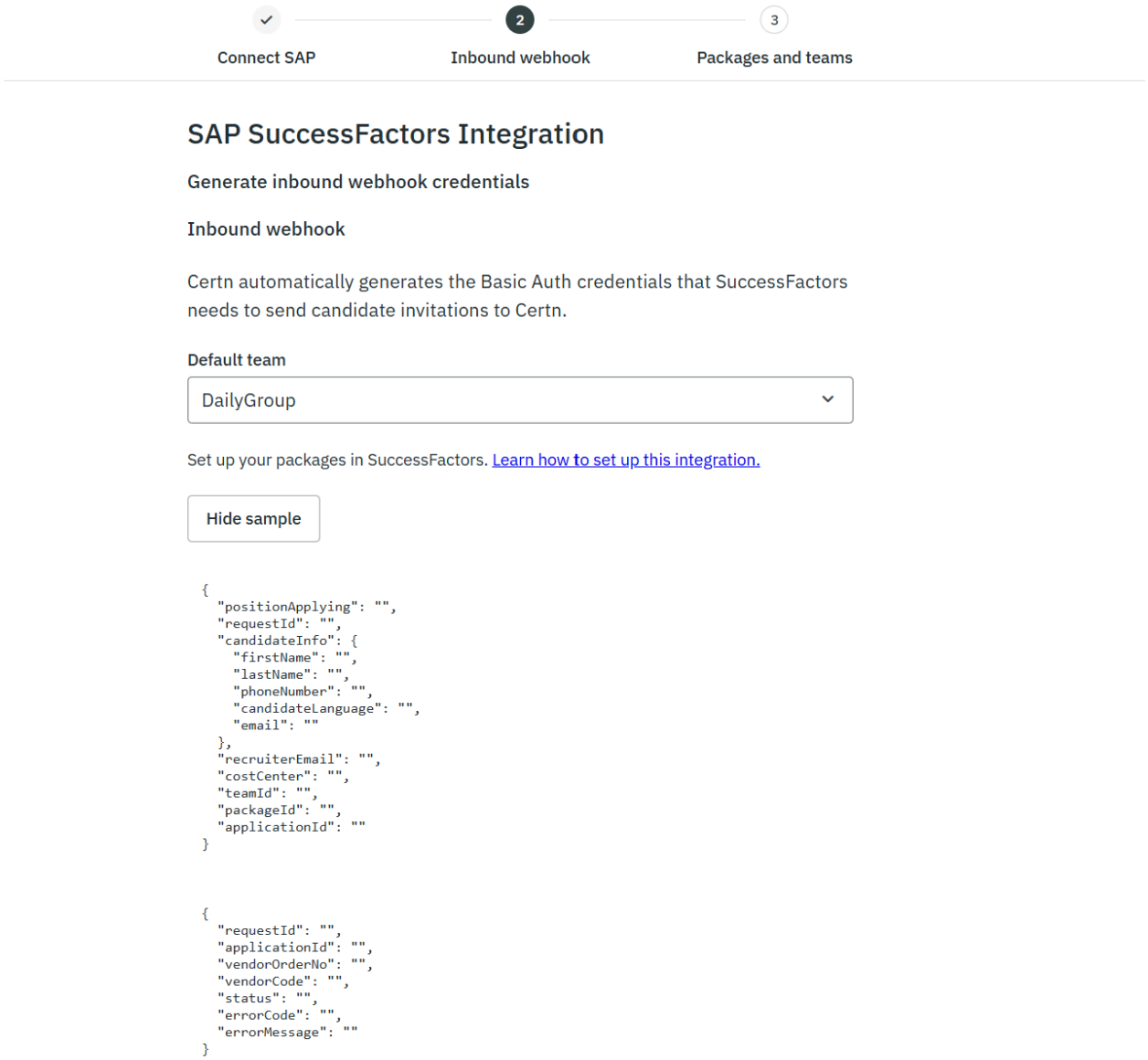


6.4.7. If the connection to your SAP SuccessFactors system is not successful, the system will show the relevant error message. Please check your entries and retry.

6.5. At Step 2, select the default group you would like your orders to be associated with. If you select a group at the time of ordering in SAP SuccessFactors, this value will be overridden.



6.6. Click “Show Sample” and copy the request and response json below. You will need this when you setup the integrations to certn in SAP SuccessFactors (Step 7).



Sample Request JSON


```
{
  "positionApplying": "",
  "requestId": "",
  "candidateInfo": {
    "firstName": "",
    "lastName": "",
    "phoneNumber": "",
    "candidateLanguage": "",
    "email": ""
  },
  "recruiterEmail": "",
  "costCenter": "",
  "teamId": "",
  "packageId": "",
  "applicationId": ""
}
```


Sample Response JSON


```
{
  "requestId": "",
  "applicationId": "",
  "vendorOrderNo": "",
  "vendorCode": "",
  "status": "",
  "errorCode": "",
  "errorMessage": ""
}
```

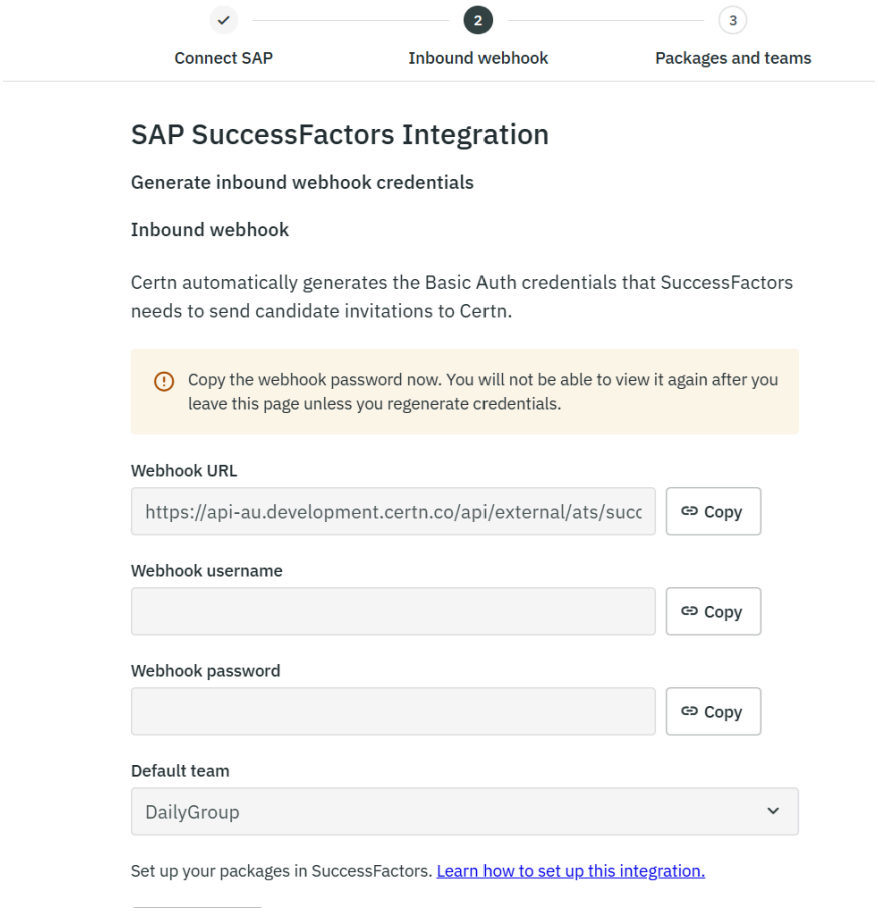

6.7. Click “Generate Credential” to navigate to Step 3.

6.8. At Step 3, the system will generate the below details which you will need when you create your Certn integration in SAP SuccessFactors (Step 7). After you copy the generated values, click the “Next” button.

6.8.1. **Webhook URL** - When a recruiter triggers a background check order in SAP SuccessFactors, this order is sent to this Certn webhook url.

6.8.2. **Webhook username -** This is the Certn Webhook username which SAP SuccessFactors will use to place a background check order to Certn.

6.8.3. **Webhook password -** This is the Certn Webhook password which SAP SuccessFactors will use to place a background check order to Certn.

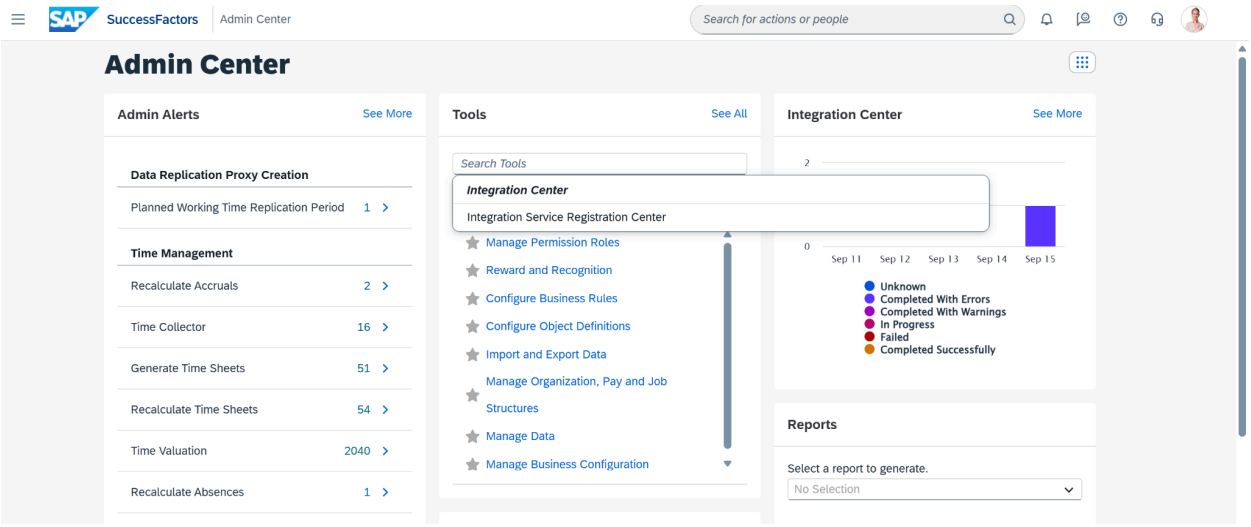


6.9. At Step 4, you will be able to copy the package ids and group ids which you will need when you create your packages and groups in SAP SuccessFactors in Step 9. Click “Finish Setup” to complete your setup. **Note:** You do not need to copy the package and group ids at this step as you will be able to access them even after the setup is complete.

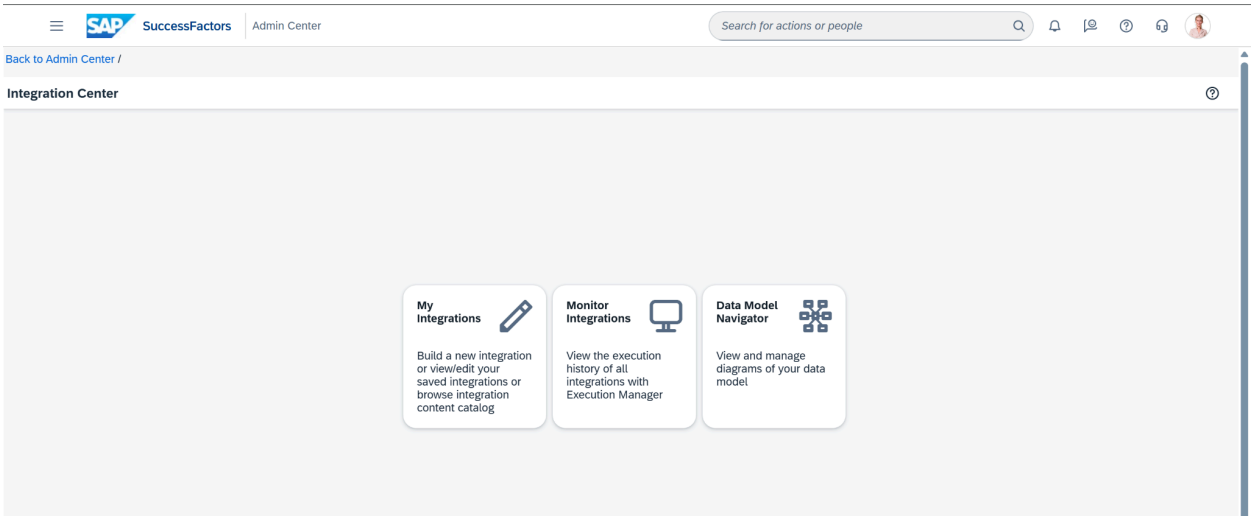
7. Setup the Certn integration in SAP SuccessFactors

7.1. In SuccessFactors, go to “Admin Center”.

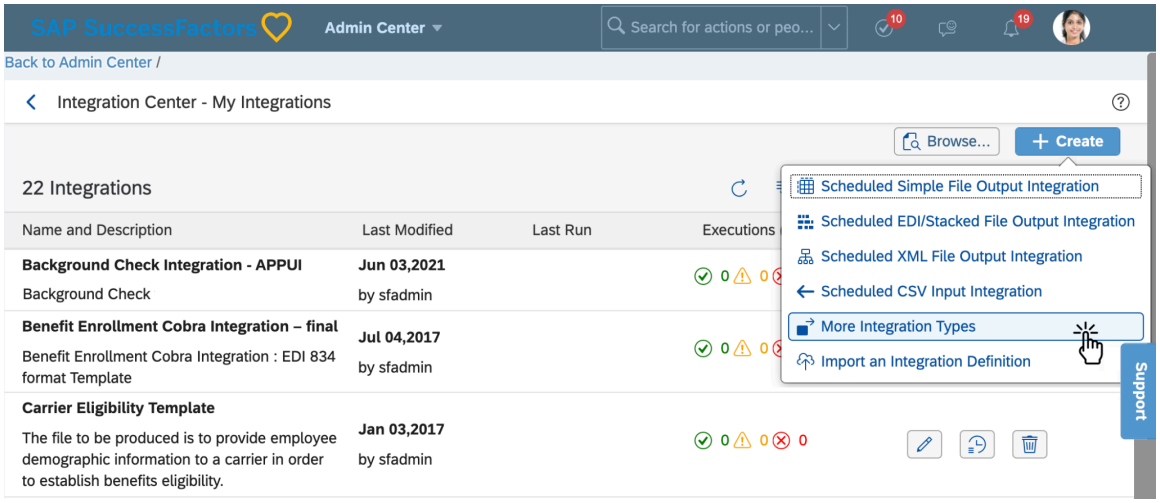
7.2. Search and select “Integration Center” from the “Tools” group.



7.3. Select My Integrations.



7.4. In the top right corner, click “Create”, then select “More Integration Types”.



7.5. Select the following options:

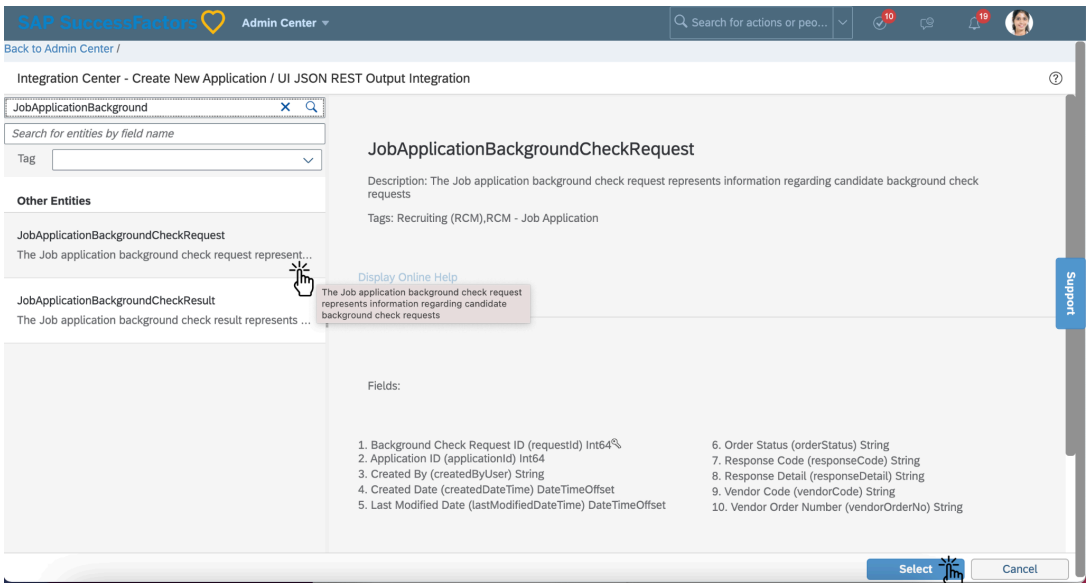
7.5.1. Trigger Type → Application/UI

7.5.2. Destination Type → REST

7.5.3. Source Type → SuccessFactors

7.5.4. Format → JSON

7.6. In the “Search for Entities by Entity Name” search box, start typing JobApplicationBackgroundCheckRequest. Click on this option when it appears in the list, then click on “Select”.

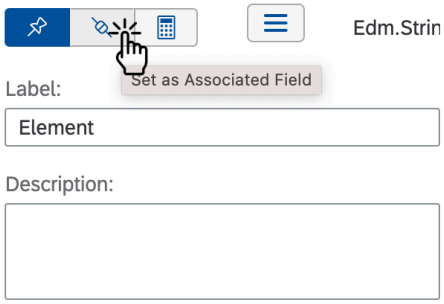


7.7. In the next window rename your integration, for example “Certn Background Check”, then click “Next” to move to the “Configure fields” section.

7.8. The easiest way to set up your elements is to upload the JSON you have saved in Step 6. To upload this file, click on “⇪ Destination from Sample JSON File”.

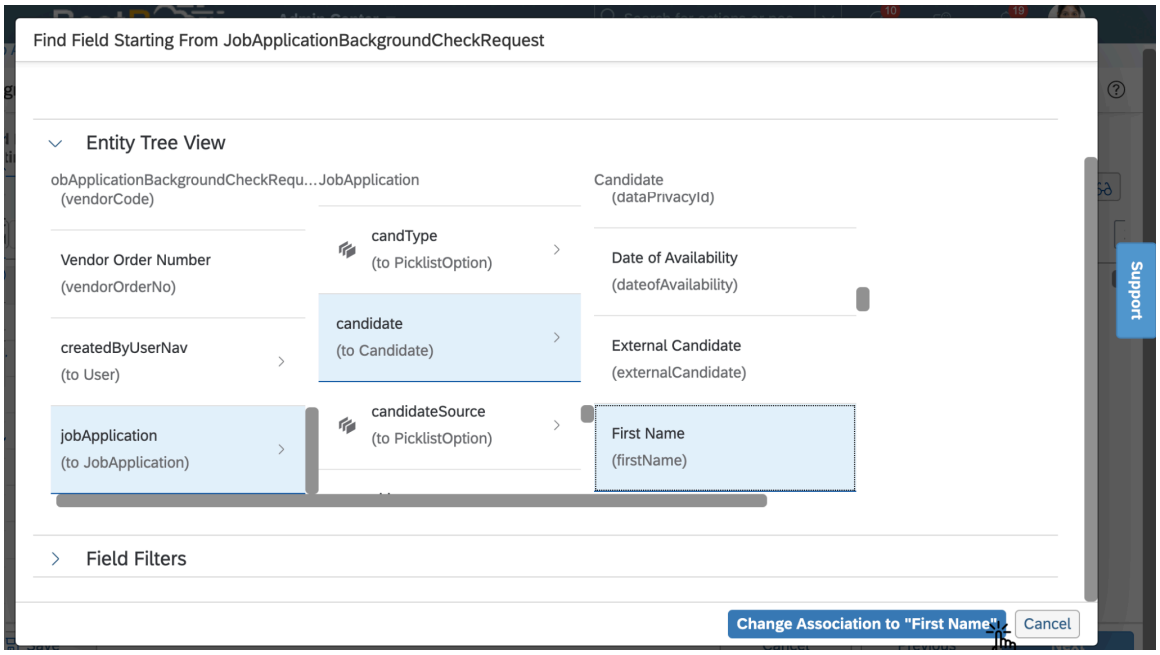
```
{
 "positionApplying": "",
 "requestId": "",
 "candidateInfo": {
  "firstName": "",
  "lastName": "",
  "phoneNumber": "",
  "candidateLanguage": "",
  "email": ""
 },
 "recruiterEmail": "",
 "costCenter": "",
 "teamId": "",
 "packageId": "",
 "applicationId": ""
}
```

7.9. Next, create associations between all of your elements and existing fields within SuccessFactors (using the field mapping as per Appendix A) by selecting each element and then selecting the “Set as Associated Field” icon:



You can search for the SuccessFactors field, or use the “Entity Tree View” expander to find the field within the existing structure. For example, in the

screenshot below, the firstName element is being associated with jobApplication/candidate/firstName using the "Entity Tree View".



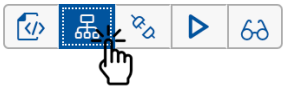
Confirm the association by clicking on "Change Association to Selected Field". Once all the elements are associated with existing SuccessFactors fields, click on "Next" to proceed to the "Response Fields" section.

7.10. The "Response Fields" section must be set up so that once a background check request was sent to Certn (the vendor), Certn will send back a response to SuccessFactors. The order number returned by the Certn is also saved so that it can be used to validate background check results later. The response data must also be mapped into the ODATA object "JobApplicationBackgroundCheckRequest" entity, which will be used by SuccessFactors to update (amongst other things) the background check status in their user interface (see Appendix B).

7.11. First, upload a JSON to define your response elements (see below), then switch to "Detail View" to create associations between your elements and existing SuccessFactors fields.

```
{
 "requestId": "",
 "applicationId": "",
 "vendorOrderNo": "",
 "vendorCode": "",
 "status": "",
 "errorCode": "",
 "errorMessage": ""
}
```

Switching to “Detail View”:



Change the operation type to “Upsert Single”, and create associations for each of the response fields. Click “Next” to proceed.

7.12. The “Filter and Sort” section requires no further actions, so navigate to the “Destination Settings”. Ensure that the settings are as follow:

7.12.1. For testing and production use the urls generated in Step 6 when you set up the SAP integrations in the Certn client portal.

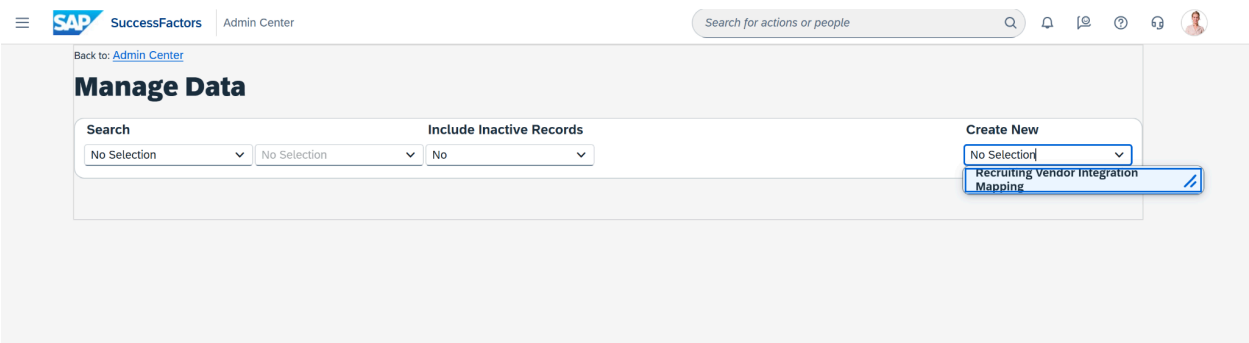
7.12.2. Enter the generated User Name and Password you generated in Step 6 .

7.13. Click “Save”.

8. Assign the integration to the Certn vendor in SAP SuccessFactors

8.1. Go to the “Admin Center”, search the “Tools” section for “Manage Data” and navigate to “Manage Data.

8.2. Search “Recruiting Vendor Integration Mapping” from Create New.



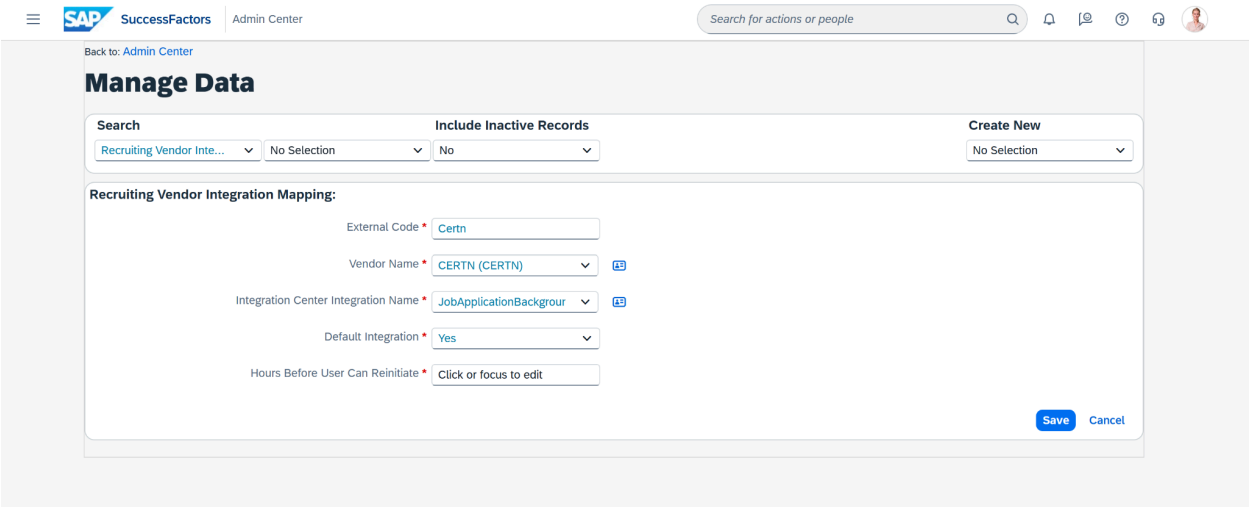
8.3. Search “Recruiting Vendor Integration Mapping” from Create New and enter the values below:

8.3.1. External Code - Certn.

8.3.2. Vendor Name - Select vendor name you created in Step 1.

8.3.3. Integration Center integration name - Select integration you created in Step 7.

8.3.4. Default Integration - Yes



8.4. Click “Save”.

9. Create background check packages and groups in SAP SuccessFactors

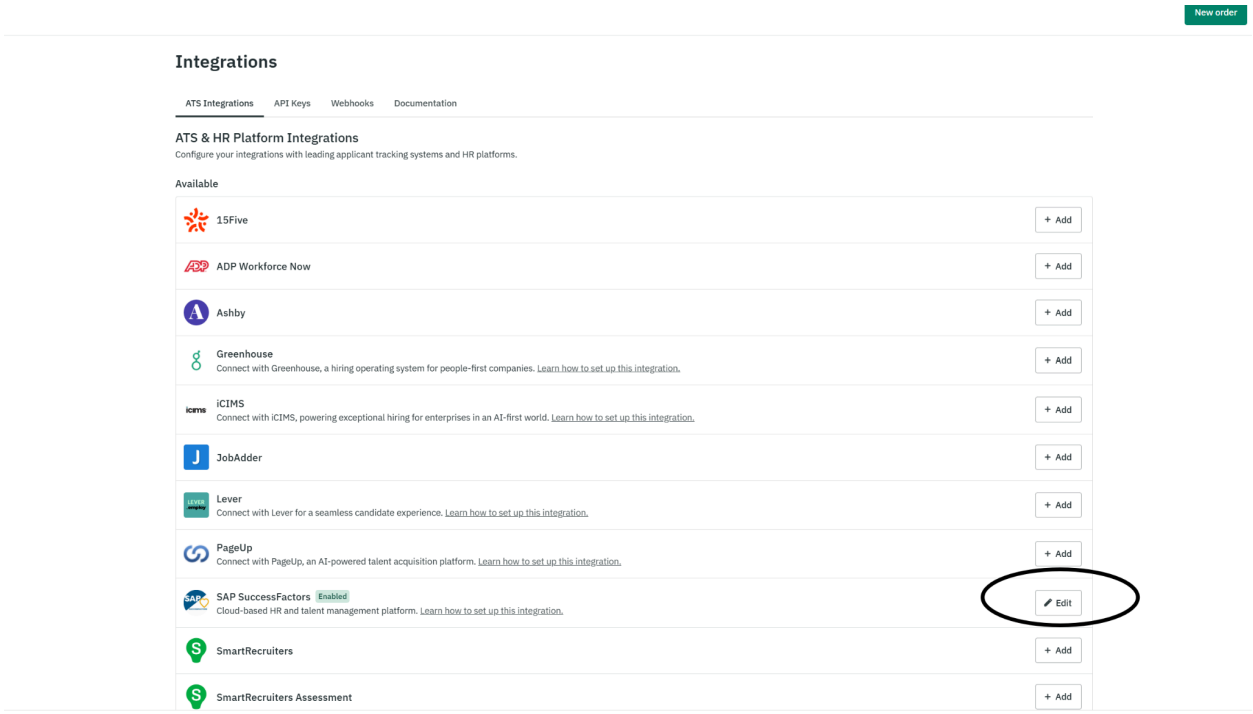
SAP SuccessFactors allows custom fields to be defined in a job requisition. You would need to define a custom field - picklist to enable your recruiters to select their desired Certn packages and groups when they invite candidates to complete a background check application.

Set up a package in the Certn Centric dashboard by following [these] instructions. Follow the below steps to set up the custom field - picklist for the packages.

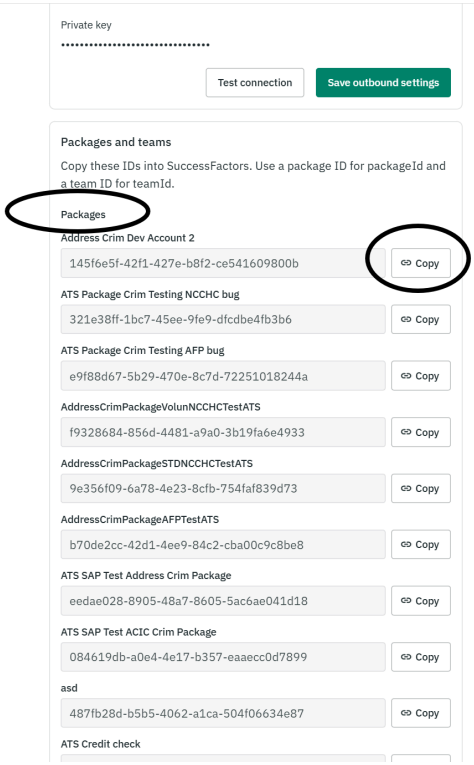
9.1. Retrieve the packages unique IDs from Centric platform

9.1.1. Login to the Certn Centric portal.

9.1.2. Navigate to the integration page by clicking on Settings -> Integrations menu and click on the edit button.



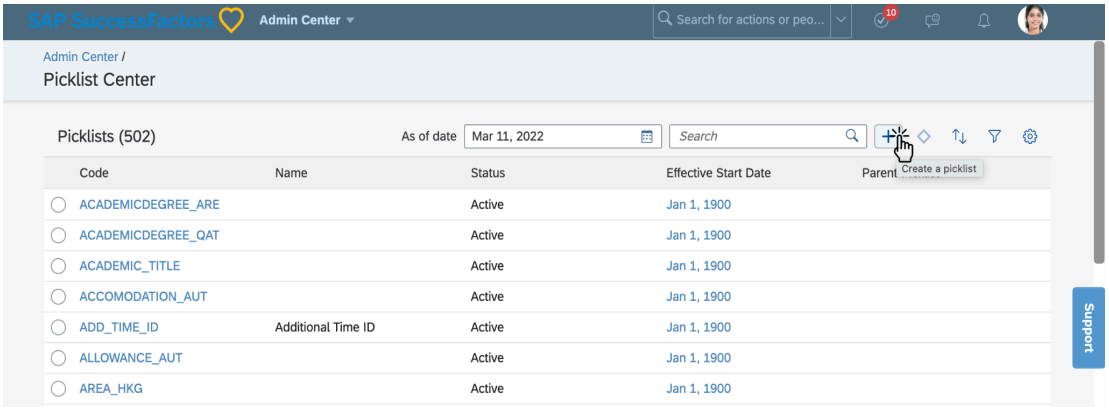
9.1.3. Copy the packages ids you would like to add in SAP SuccessFactors.



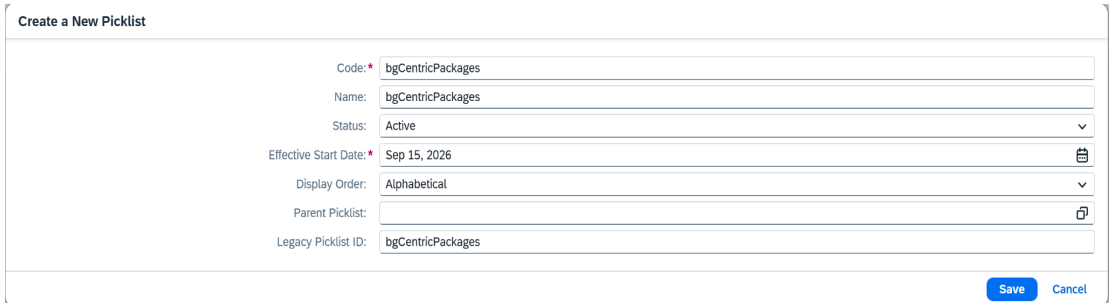
9.2. Create a package picklist

9.2.1. Go to SuccessFactors' "Admin Center". In the "Tools" section, find and navigate to the "Picklist Center".

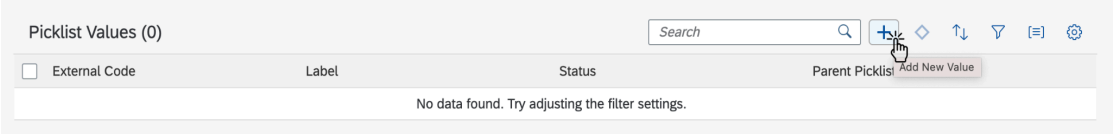
9.2.2. To create a new picklist, select the "+" icon.



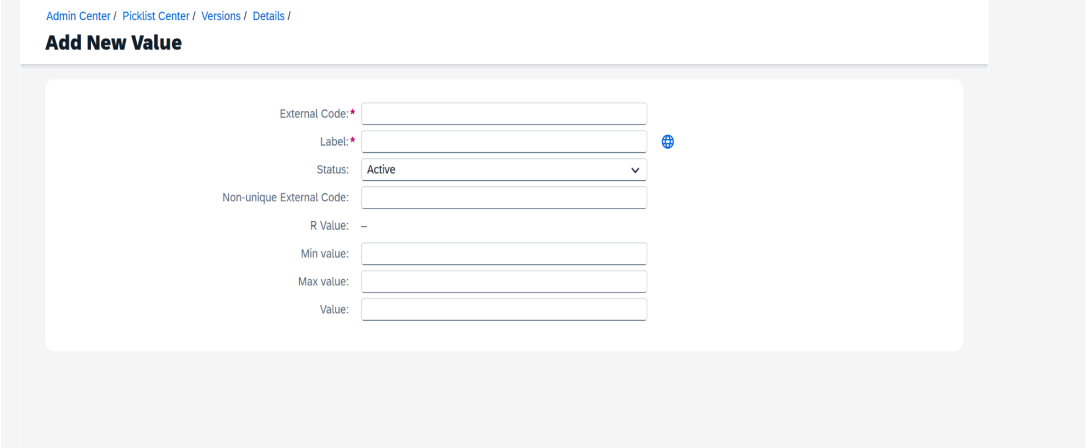
9.2.3. Set up the following picklist for packages with these values:



9.2.4. Next, you must add picklist options for each package:



9.2.4.1. Enter the below values:



9.2.4.1.1. External code - Enter the unique id of the package

9.2.4.1.2. Label - Enter the name of the package

9.2.4.1.3. Non-unique External code - Enter the unique id of the package

9.2.4.1.4. Click “Create”

9.3. Retrieve the groups unique IDs from Centric platform

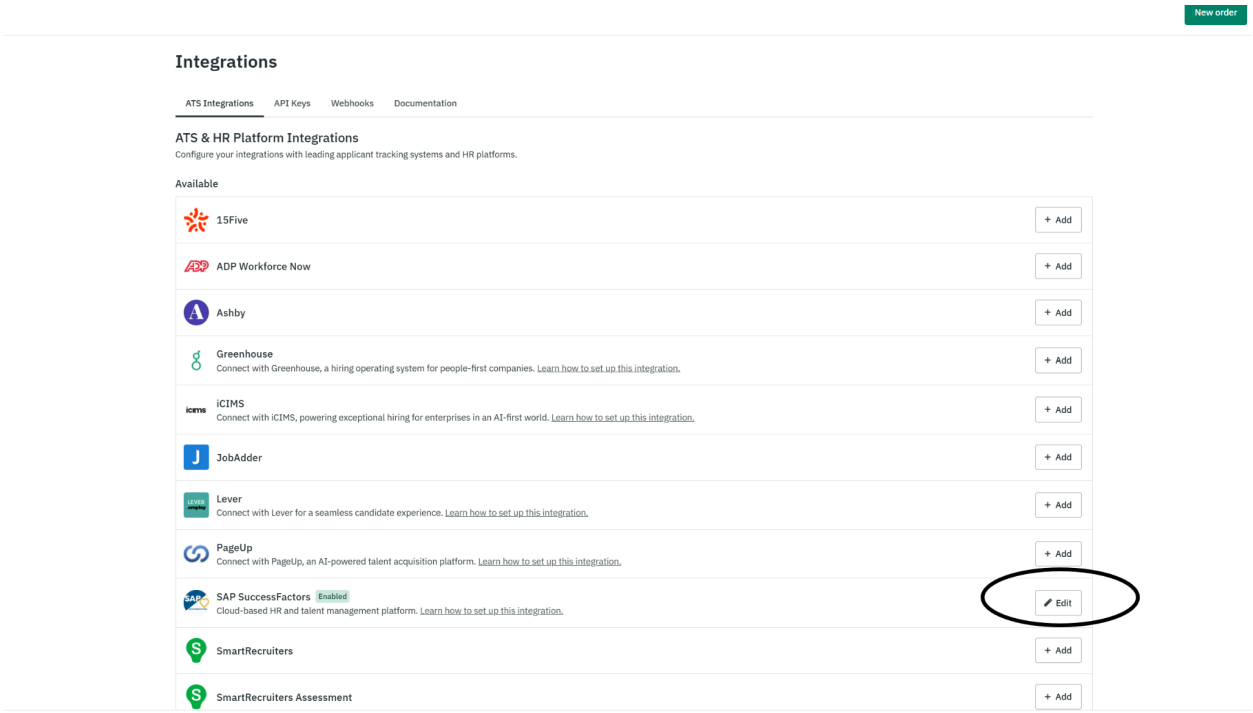
9.3.1. Set up a group in the Certn Centric dashboard by following these instructions.

9.3.2. Follow the below steps to set up the custom field - picklist for the groups.

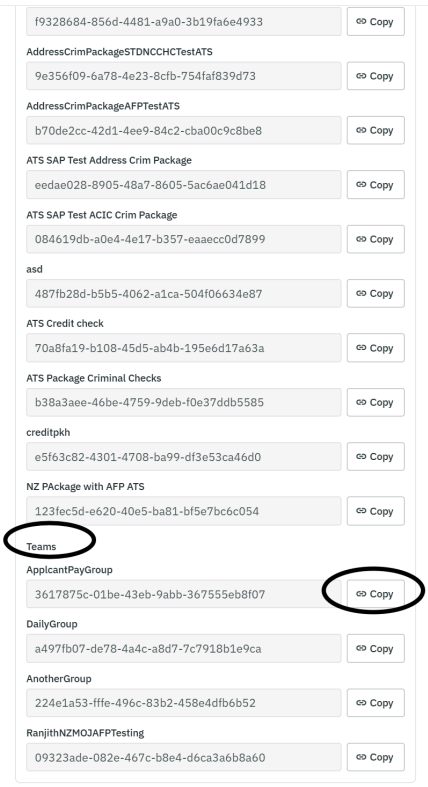
9.3.3. Once you have your group(s) created, note down the ids of each of the group(s) by following the below steps:

9.3.3.1. Login to the Certn Centric portal.

9.3.3.2. Navigate to the integration page by clicking on Settings -> Integrations menu and click on the edit button.



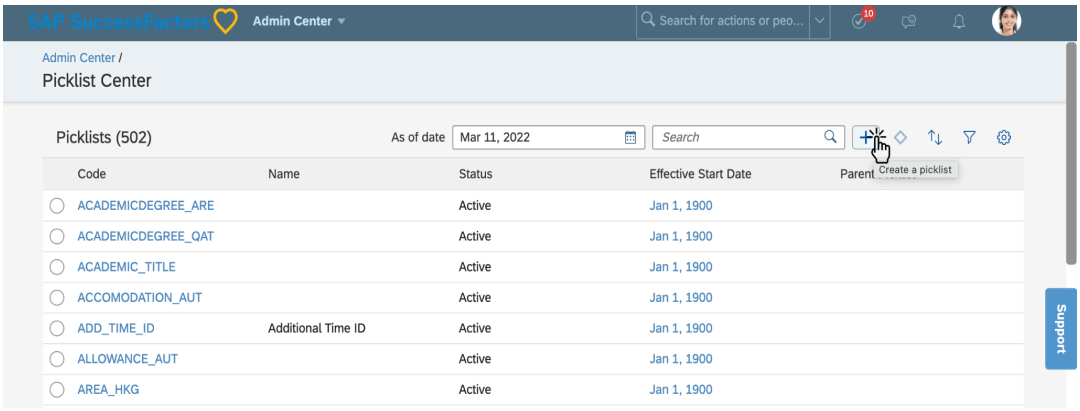
9.3.3.3. Copy the group ids you would like to add in SAP SuccessFactors.



9.4. Create a Group picklist

9.4.1. Go to SuccessFactors' "Admin Center". In the "Tools" section, find and navigate to the "Picklist Center".

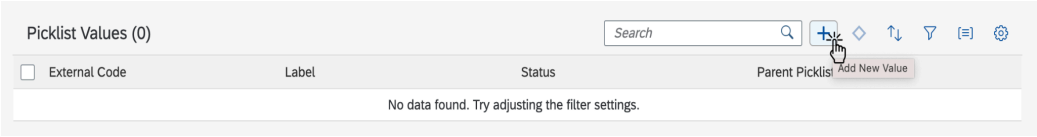
9.4.2. To create a new picklist, select the "+" icon.



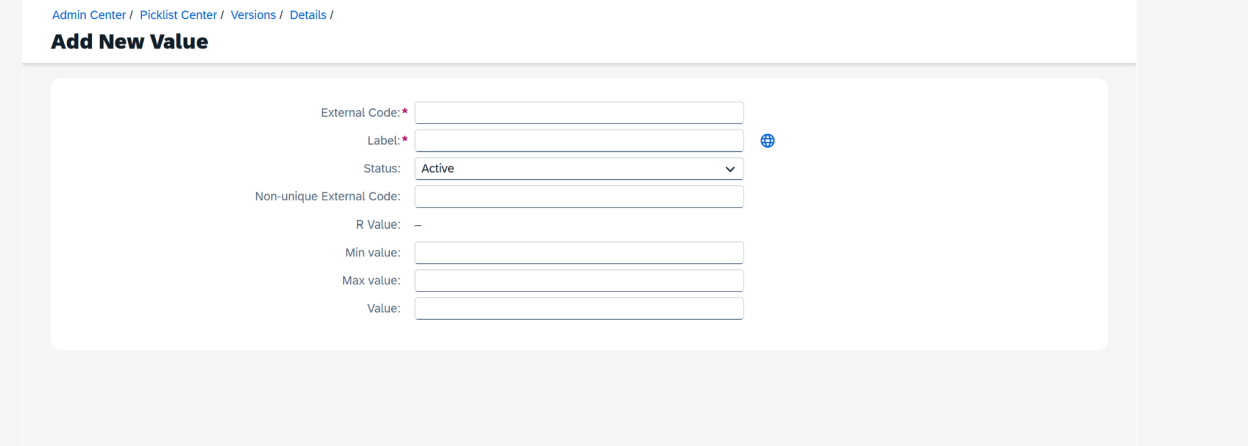
9.4.3. Set up the following picklist for groups with these values:



9.4.3.1. Next, you must add picklist options for each group:



9.4.4. Enter the below values:



9.4.4.1. External code - Enter the id of the group

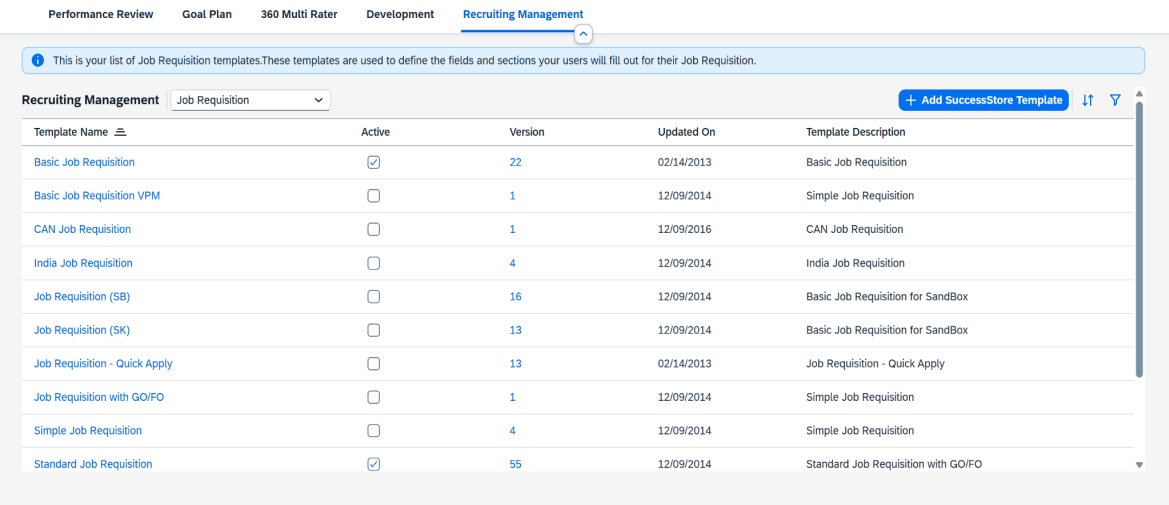
9.4.4.2. Label - Enter the name of the group

9.4.4.3. Non-unique External code - Enter the id of the group

9.4.5. Click “Create”.

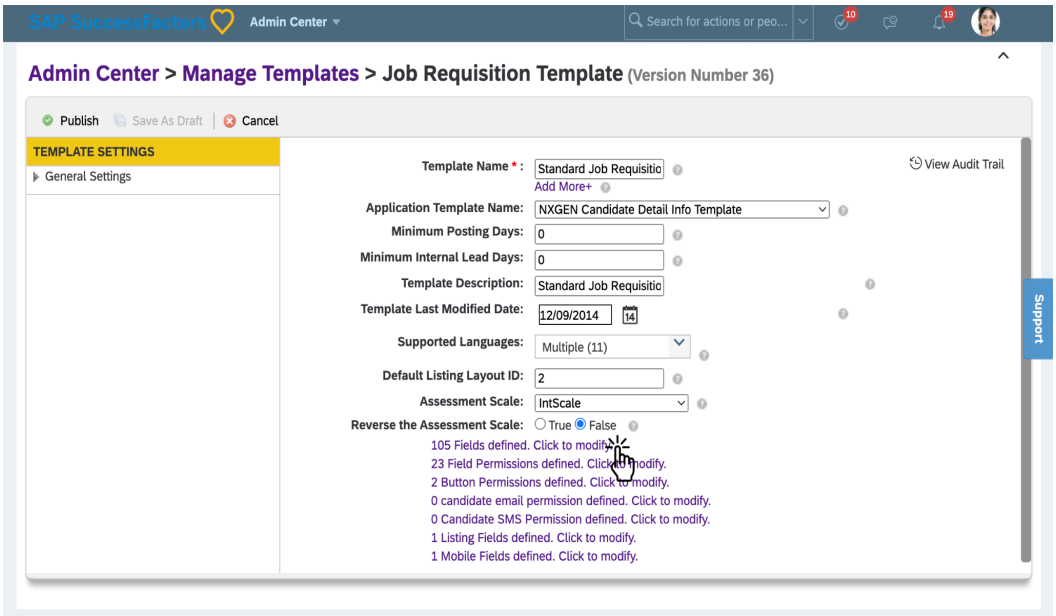
10. Add your picklists to your job requisition

10.1. In SuccessFactors, go to “Admin Center”, then from the “Tools” section, navigate to “Manage Templates”. Select “Job Requisition” option under the “Recruiting Management” dropdown.

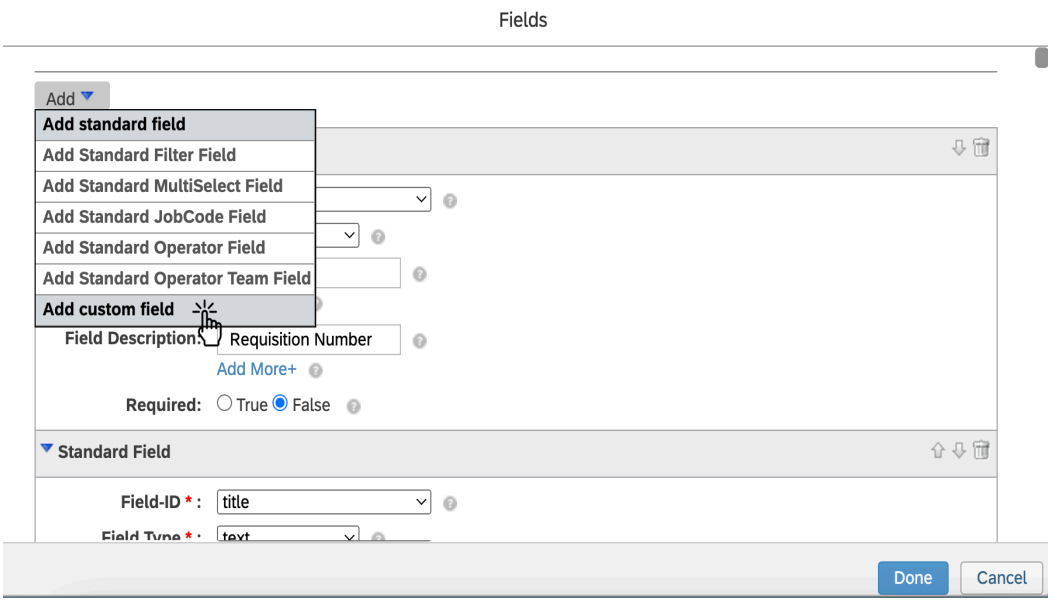


10.2. Select the Job Requisition template that you want to edit to include the background check.

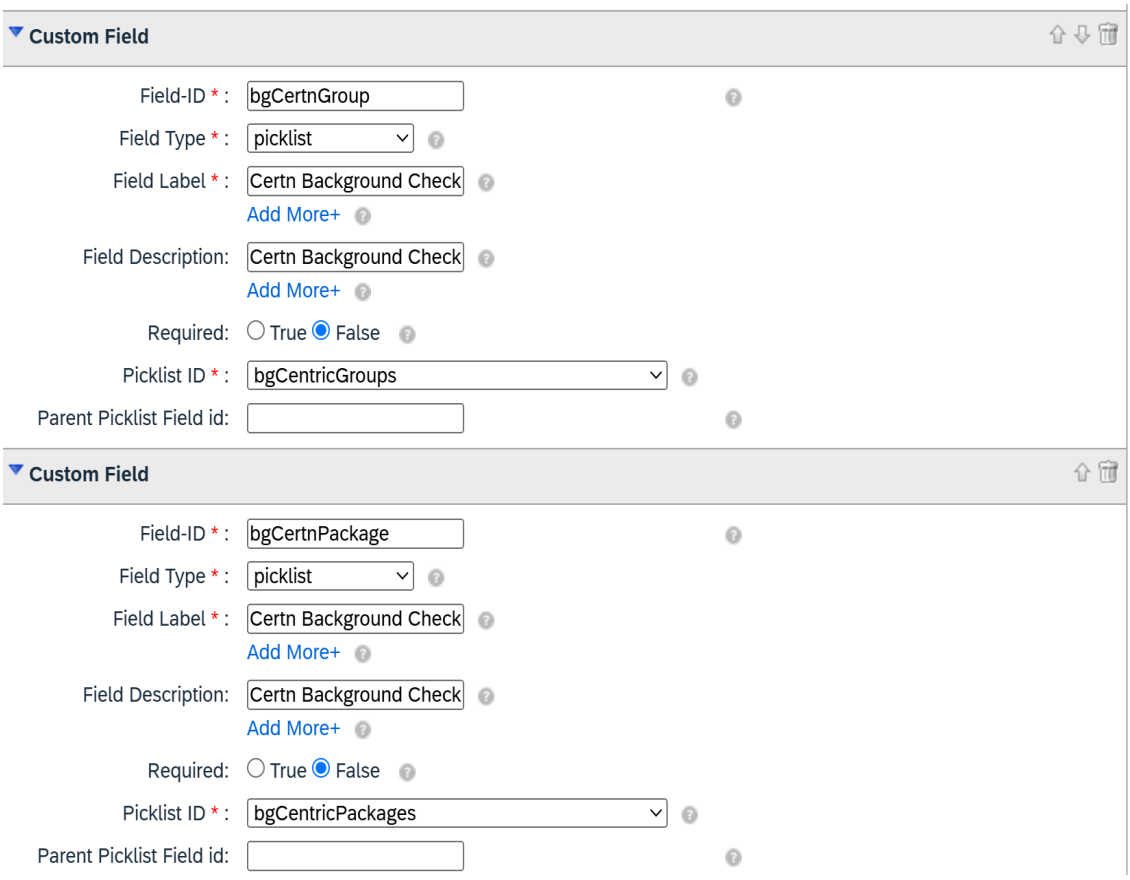
10.3. Click on “[X] fields defined. Click to modify”.



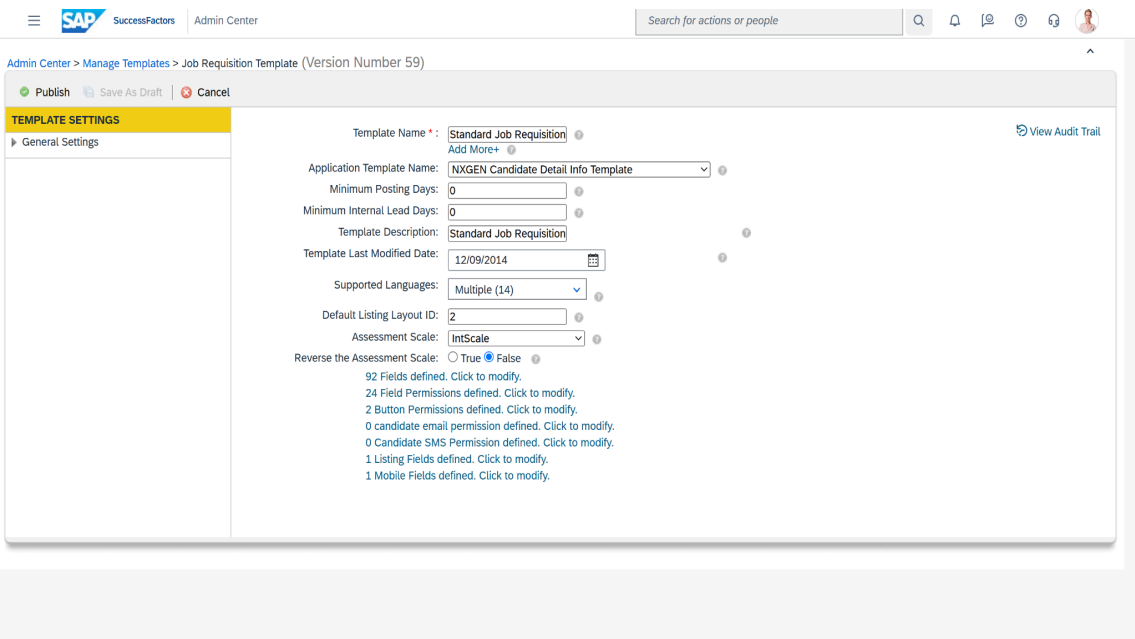
10.4. On the next screen, click “Add”, then select “Add Custom Field”.



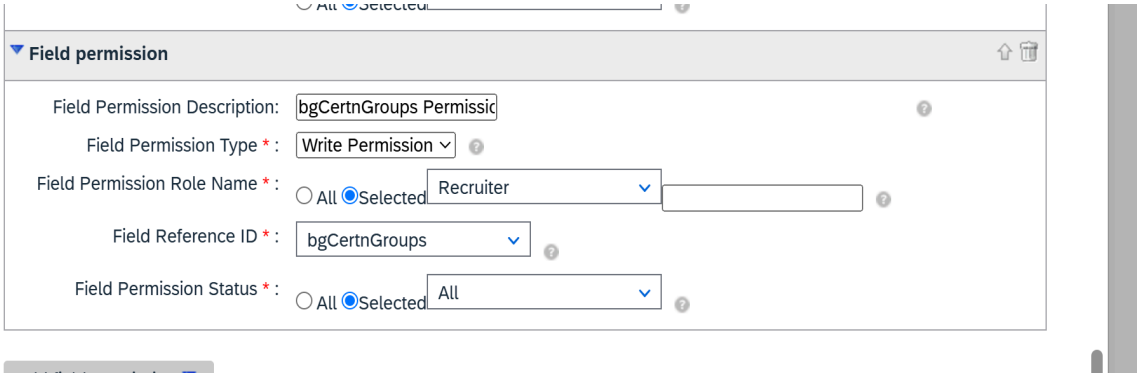
10.5. Create two new custom fields with the following information:



10.6. Setup the permissions by clicking on Modify field permissions.



10.7. Enter the below data for each.

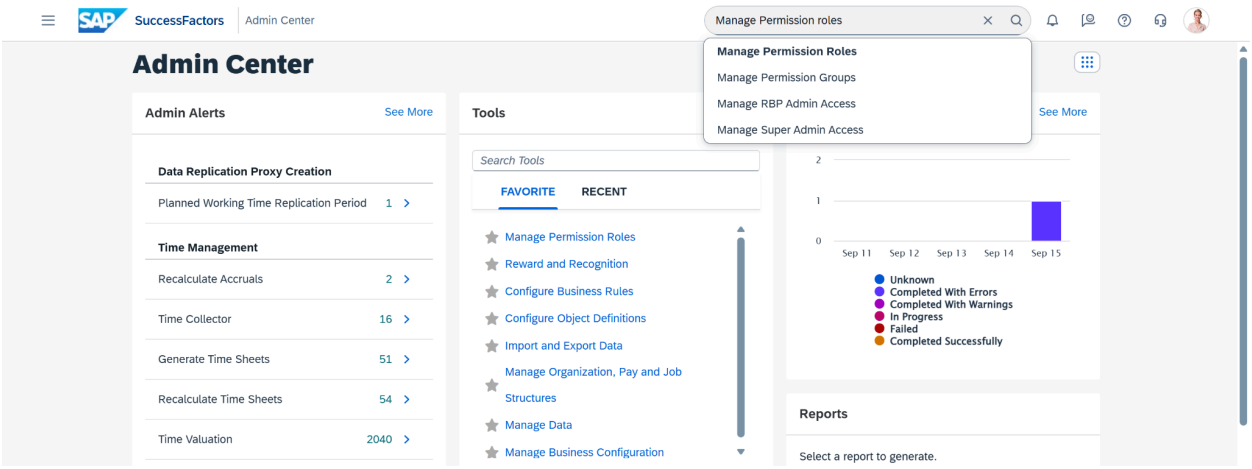


10.8. Click “Done” to save these changes, then “Publish” (top left).

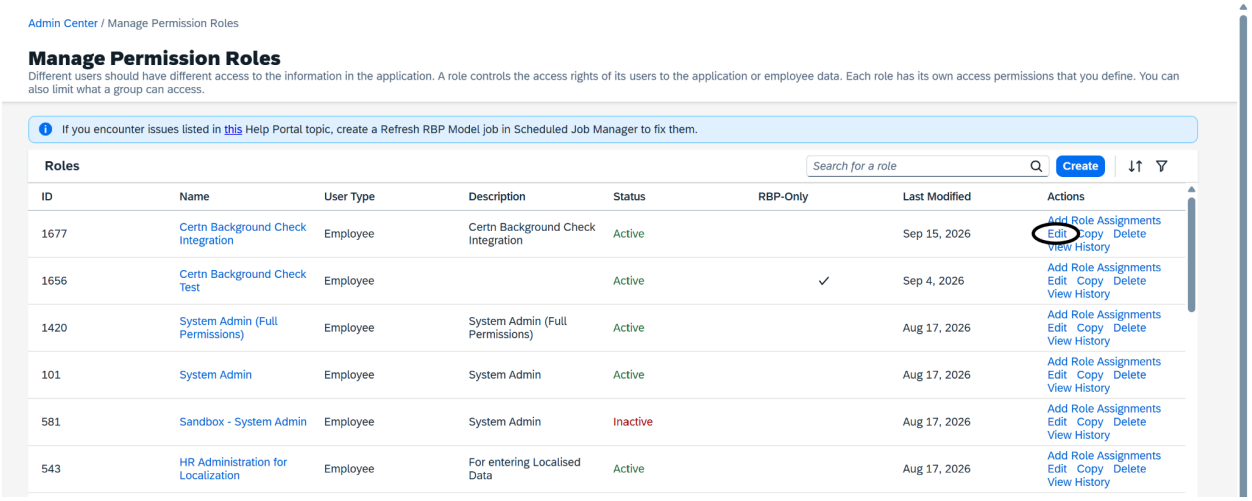
11. Provide the appropriate role-based permissions to your recruiters

Provide the following SuccessFactors permissions to your recruiter role (see this link for information on how to set role-based permissions).

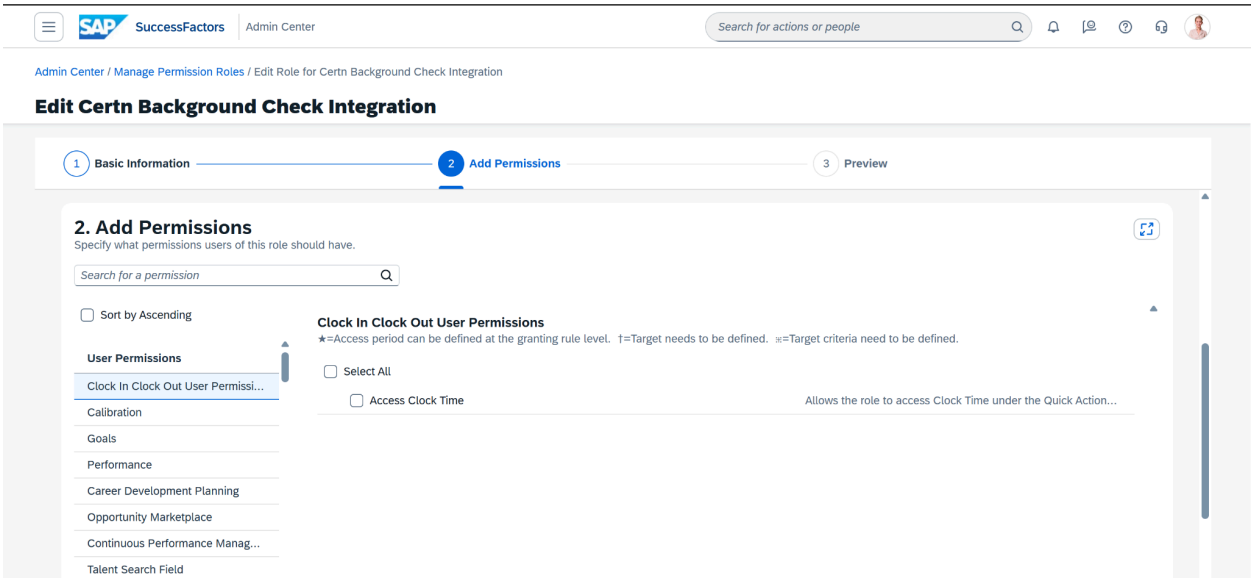
11.1. Go to Admin Center → Manage Data.



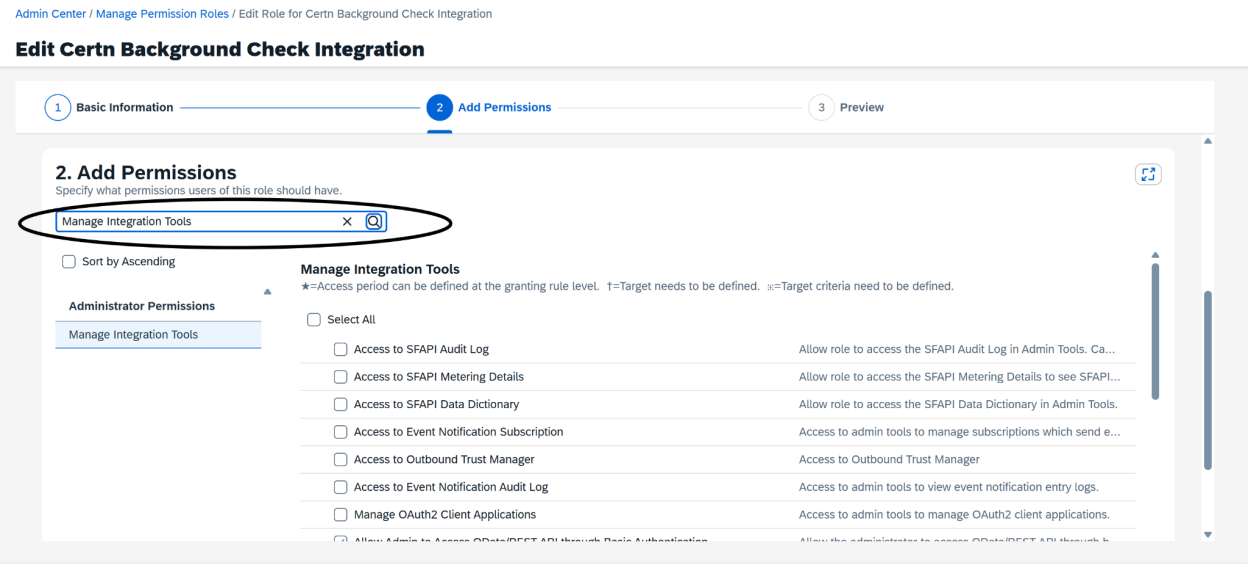
11.2. Edit the group which your recruiter users belong to.



11.3. Navigate to “Add permissions” by clicking “Next”.



11.4. Enter “Manage Integration Tools” permission in the search field below:



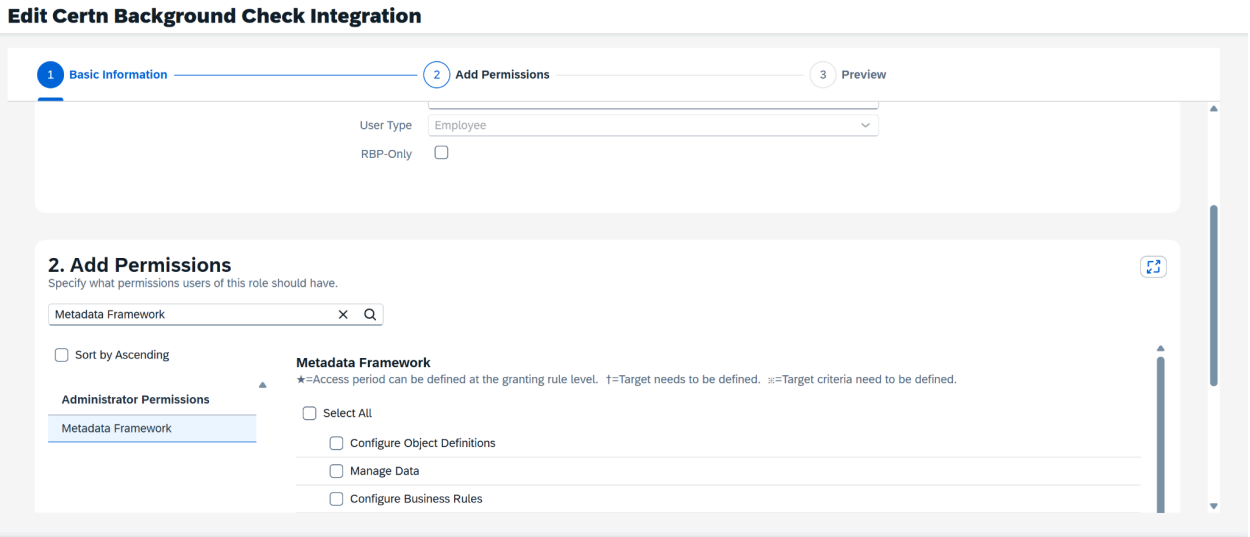
11.5. Add the below permissions:

11.5.1. Allow Admin to Access OData API through Basic Authentication.

11.5.2. Allow users to execute “Application/UI” or “Event-based” Integrations.

11.5.3. Access to Integration Center.

11.6. Enter “Metadata Framework” permission in the search field below:



11.7. Add the below permissions:

11.7.1. Admin access to MDF OData API

11.7.2. Access to non-secured objects

11.8. Enter “Recruiting Permissions” permission in the field below:

11.8.1. Add the below permissions:

11.8.1.1. Background Check Initiate Permission

11.8.1.2. Background Check Update Permission

11.8.1.3. Ensure that all users that need to view background check results are also members of your account with Certn.

11.8.1.4. View this link for information on how to set up users in Certn Centric.

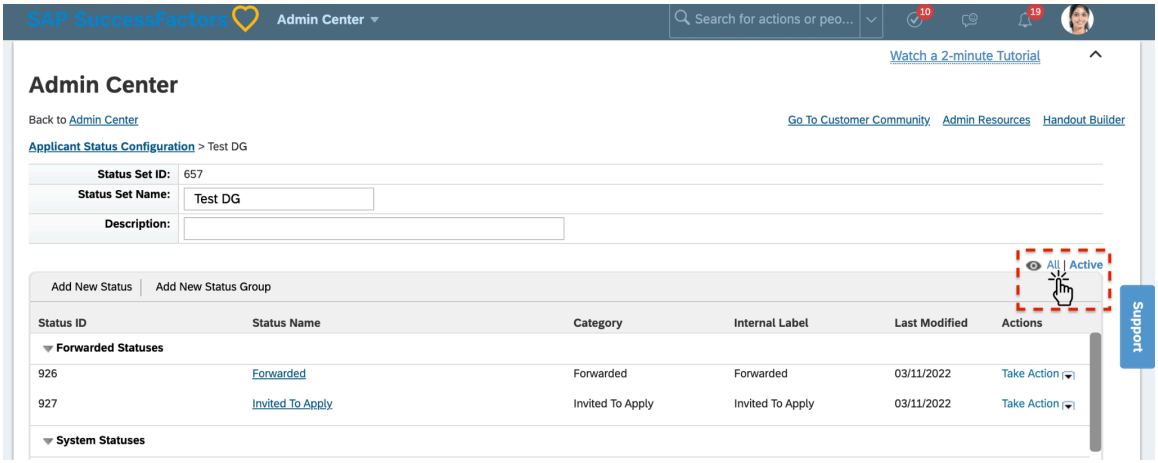
12. Add a background check stage into your talent pipeline

12.1. Go to the “Admin Center”, from the “Tools” section search for and navigate to “Edit Applicant Status Configuration”.

12.2. Choose an existing status set configuration, or select “Create New Status Set”.

12.3. Within the status set, click on “Add New Status”, and select “Background” from the list.

12.4. To see the new stage you added in the list of status, ensure that you’re viewing “All”, not “Active” statuses at the top right of the list.



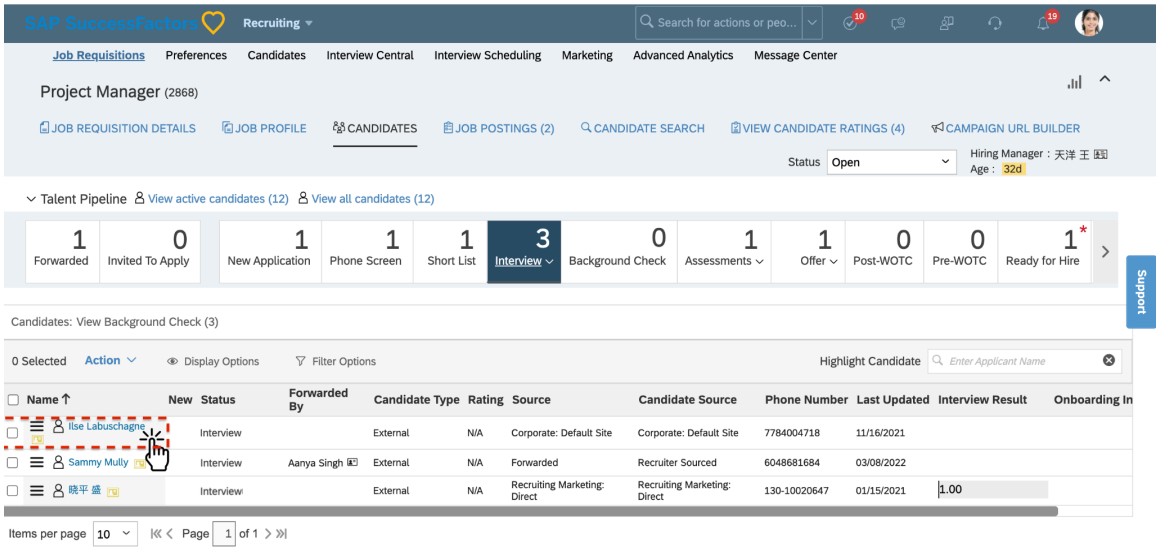
12.5. Click on the background check stage to set up or edit any necessary details for it to be added to become active in the pipeline.

13. Initiate a background check

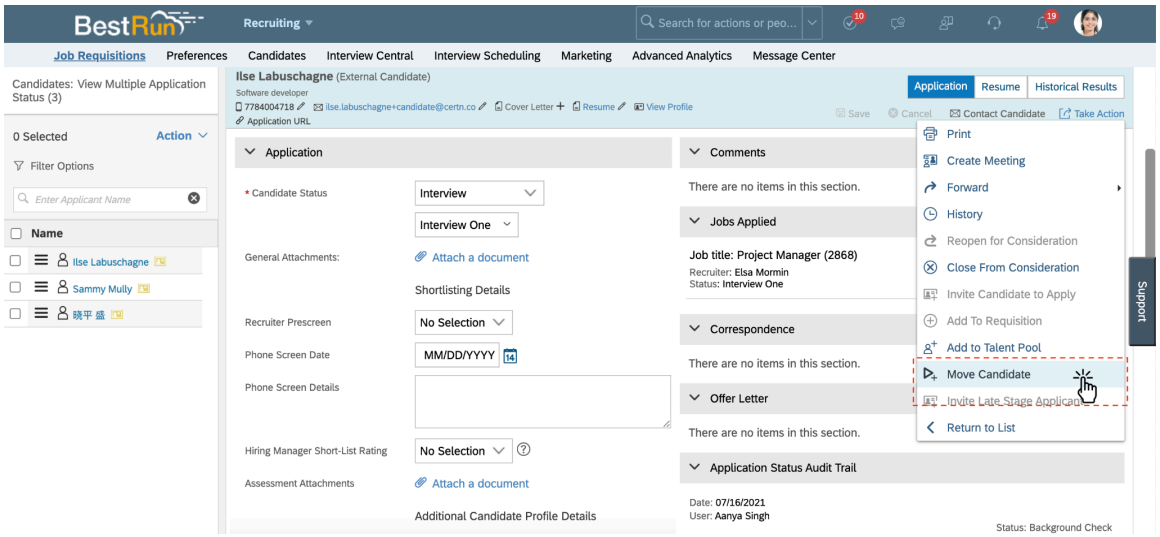
This section is aimed at recruiters who track their candidates' progress through the job application process.

Once a job requisition that requires a background check has been created and posted the recruiter moves their candidate through the various stages of the job application process.

To move a candidate to a different stage, (e.g. into a background check stage), first select the candidate from the list of candidates in a previous stage. In the screenshot below, a candidate is selected from the Interview stage.



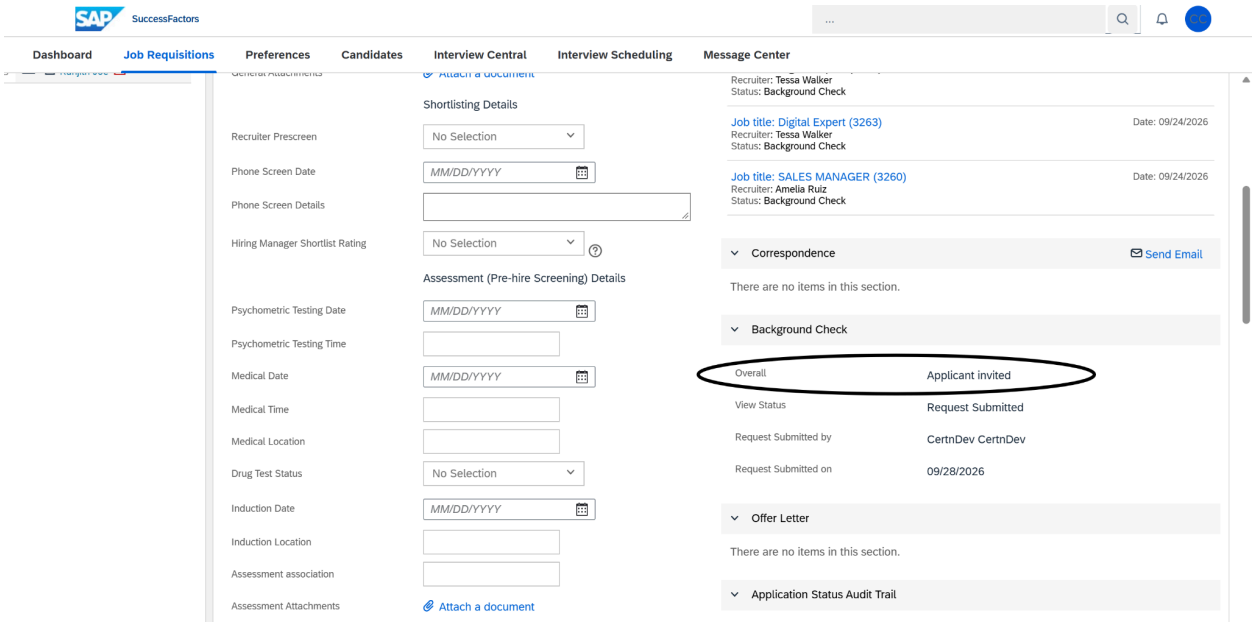
In the candidate file, in the top right corner, click on “Take Action” → “Move Candidate”, then select the background check stage.



With the applicant now in the Background Check stage, click on “Take Action” again and you will now have the option to “Initiate Background Check”. Click this option and confirm that you want to initiate the background check process. This triggers a background check request to be sent to Certn. The request includes candidate and position information, and any information that may be required depending on the type of check that was requested. Certn will contact the candidate to collect any

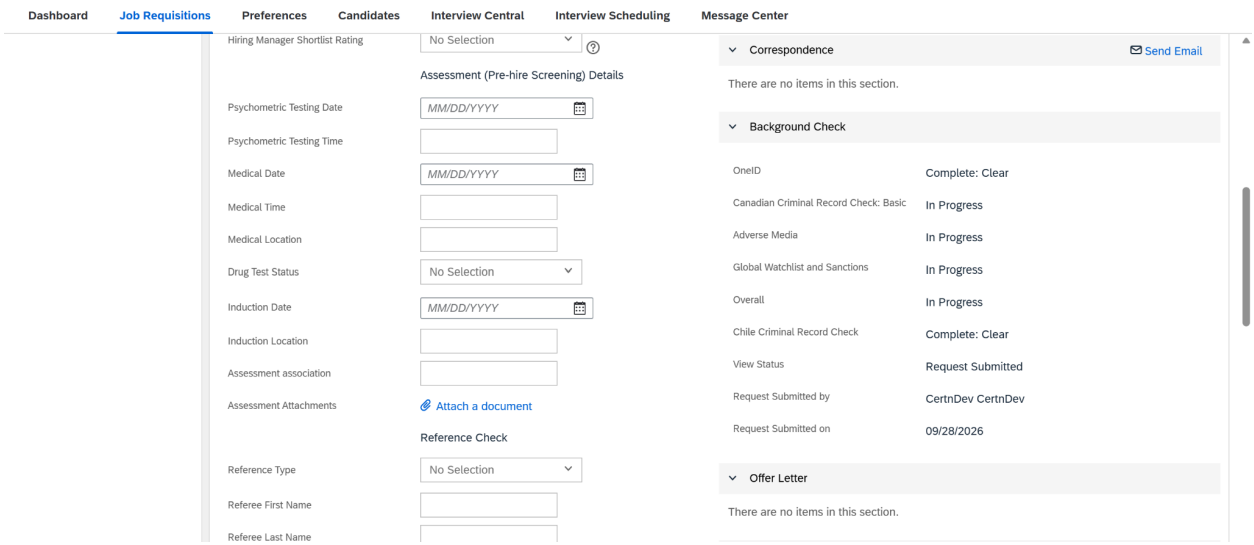
consent or additional confidential personal data to perform the proper background check tests.

You can refresh the page to see the “Request Submitted” status and the overall package status .

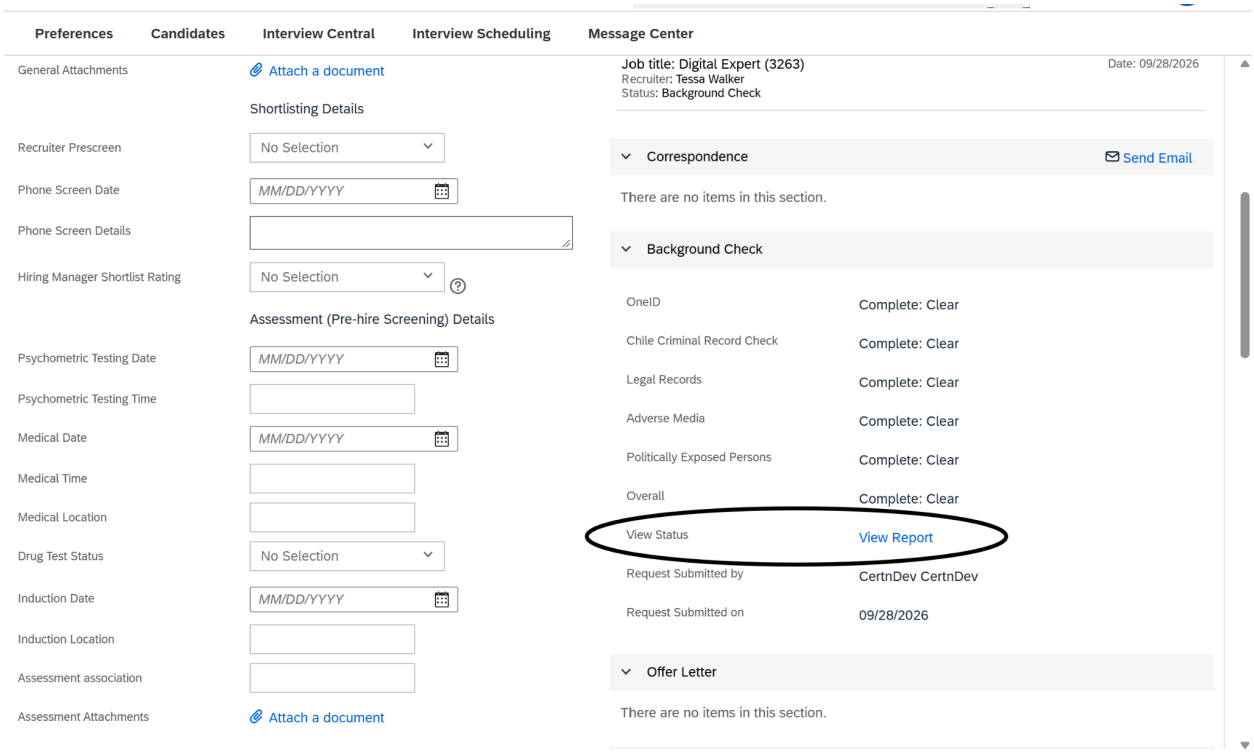


14. View background check status and results

After the applicant has submitted the application, you will be able to view the status of all checks within the package. This information is displayed in the Background Check portlet within the candidate’s summary page (Recruiting → Job Requisitions → Candidates).



Once all checks in the package have been processed, Certn returns the results. When there are results to view, the “View Report” link becomes active and you can follow it to log in to the Certn dashboard and view the results.



15. What do the background check statuses mean

Certn Status	Appears At	Description
Case Ordered	Overall	This status indicates the case has been ordered.
Applicant Invited	Overall	This status denotes that the applicant has been invited to start the application.
Applicant Opened	Overall	This status denotes that the applicant has viewed the invite email to start the application.
Applicant Started	Overall	This status denotes that the applicant has started the application.
Applicant Submitted	Overall	This status denotes that the applicant has submitted the application.
Invite Undeliverable	Overall	This status denotes that the system has not delivered the email to the applicant because the email has bounced back.
Applicant Expired	Overall	This status denotes that the case has expired because the applicant has not responded with the case expiry period set for your account.
In Progress	Overall, Check level	That status means the case is being processed.
In Dispute	Overall, Check level	This status denotes that the applicant has disputed the case results.
Applicant Action Required	Overall, Check level	This status denotes that the certn has reached out to the applicant for additional information.
Client Action Required	Overall, Check level	This status denotes that the certn

		has reached out to the recruiter for additional information.
Cancelled	Overall, Check level	This status denotes that the case has been cancelled.
Awaiting Applicant Submission	Check level	This status denotes that the applicant has started the application and is yet to submit the check.
Pending Fulfillment	Check level	This status denotes that the check is being fulfilled.
Submitted to Source	Check level	This status denotes that the check has been submitted to the end verifier.
Completed	Overall, Check level	This status denotes that the case/ check has been completed.
Completed - Clear	Overall, Check level	This status denotes that the case/ check has been completed without any adverse findings.
Completed - Review	Overall, Check level	This status denotes that the case/ check has been completed and needs the recruiter to review the report.
Completed - Restricted	Overall, Check level	This status denotes that the case/ check has been completed but the status and reports are restricted to the recruiter due to the compliance rules of the check. Example - The status and reports of a Standard Nationally Coordinated Criminal history check cannot be viewed outside Australia.

FAQS

1. **If a background check initiation fails, where do i see the errors in SAP SuccessFactors**
   Login to SAP SuccessFactors using your credentials, Navigate to Admin Center → Integration Center → Monitor Integrations → select the execution → Event Log

2. **How do I regenerate the Certn Basic authentication credentials?**
   Login to Certn Centric portal using your credentials. Navigate to Admin→ Integration. Edit the SAP SuccessFactors integration. Click on "Regenerate Credentials".

Appendix A: Request Payload field mapping

Field name	**Example association**	**Format**	**Description**
requestId	JobApplicationBackgroundCheckRequest/RequestId	string	The request ID from Successfactors
applicationId	JobApplicationBackgroundCheckRequest/ApplicationId	string	SuccessFactors' application ID
candidateInfo/firstName	jobApplication/candidate/firstName	string	Candidate's first name
candidateInfo/lastName	jobApplication/candidate/lastName	string	Candidate's last name
candidateInfo/email	jobApplication/candidate/contactEmail	string	Candidate's email address
candidateInfo/phoneNumber	jobApplication/cellPhone	string	Candidate's primary phone number
CandidateInfo/candidatelanguage	jobApplication/candidate/candidatelocale	string	Candidate's preferred language to receive their application in
recruiterEmail	createdByUserNav → emailId	string	Recruiter's email id
teamId	jobApplication/jobRequisition/bgCertnGroup/externalCode	string	The group ID from Certn Centric. Please click here to learn how to set up groups

packageId	jobApplication/jobRequisition/bgCertnPackage/externalCode	string	The packageID from Certn Centric. Please click here to learn how to set up packages.
positionApplying	jobApplication/jobRequisition/jobRoleEntity/Role Name	string	Name of the position for the job requisition
costCenter	JobRequisition/costCenter	string	Cost center of job requisition

Appendix B: Response Payload field mapping

Field name	**Format**	**Description**
applicationId (Application ID)	string	SuccessFactors' Application ID
vendorCode (Vendor Code)	string	SuccessFactors' Vendor Code field (previously set as value "CERTN")
requestId (Background Check Request ID)	string	The Request ID from Successfactors
status	string	SuccessFactors' order status
errorCode (Response Code)	string	SuccessFactors' response code
errorMessage	string	SuccessFactors' response detail
vendorOrderNo (Vendor Order Number)	string	SuccessFactors' vendor order number