

## INTRODUCTION GUIDE (GUIDE F1)

### **This guide is for businesses that:**

- Want to use the API to create a custom connection.
- Want to implement record sending and Databank search.
- Want to use branches for usage tracking.

1. Now that you've created your account navigate to the 'Search' page and perform a quick test search of the CONVEY Databank using the sample data that's pre populated (just visit the search page and click the green button). This will reveal some sample records to show you what the records look like when you conduct a real search.

2. Navigate to your CONVEY 'Settings' page (top right of your screen) click on the 'account settings' tab, at the bottom of that page you will see an option that says 'Chosen Connection Type'.

Untick the HRIS and the DIRECT CONNECT options which will make those links disappear from the main menu along the left.

3. Adjust your internal HR procedures to allow for the inclusion of Conveyable Records, consider which type of records you want to create, when they should be created, and what the content of those records should be. This adjustment should be part of your wider HR strategy so should for example include how often reviews are completed and by whom for whom. If you need help you can find a list of HR professionals in the 'Find Help' page in the bottom left.

4. Navigate to the 'Branches' page (bottom left), on that page click the buttons and activate the branches (ignore the branch level direct connect button at the bottom).



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Whilst on that page open the branches tab and add your branch accounts making note of your branch password and the branch ID that we assign, these are all shown on the branch table at the bottom for easy reference.

5. Create (or login) to your POSTMAN account, on there visit our API page where you can find the integration details (the POSTMAN url can be found on the API connect page from the main menu) Your CBR ID that you will need to create a connection can be found in the setting page (top right).

6. During the API testing use the test numbers provided at postman to test sending records to the database, records using these numbers are deleted every 24 hours. Whilst testing visit the API connect page from the left menu and check the appearance of the records you are sending to make sure the format is correct, our system flags genuine records with bad formats and prevents them entering the databank. When testing the search function remember not to save the data you are receiving, it is read only.

7. Print off our 'CONVEY Introduction' leaflet for your managers, this leaflet will give them an introduction to CONVEY and explain why you are using it.

8. Print off our 'Employee Leaflet' and circulate it to your employees to introduce them to CONVEY.

Note: If you want to design your own information leaflets, you can find the CONVEY logo on the branding page in the footer of our main website.

9. Attract the right type of job applicants by downloading our 'CONVEY connected' images from the table of downloads, you should put the image in the 'footer' of your webpage, and if possible on your 'about us' page.

10. Load your account by visiting the 'Search Credits' page shown along the left so you have everything setup ready for when you need it. You will be able to perform a search from within the HRIS software as long as you have a positive balance.

11. **FINALLY....** Profit from our growth by introducing other businesses to CONVEY, we have an article covering the benefits which is available to read from your home page.

Note 1 : When searching never store the results of the search (the information is read only) you can search the same information multiple times within a 3 month period and you will only use one search credit so there is no need to store data.

Note 2 : When creating records never make reference to an employee's specific medical condition or uncontrollable aspects of their physical appearance, never list contact numbers, addresses or make reference to an employee's sexuality or religious beliefs.

**A Quantum Leap Forward...**