

INTRODUCTION GUIDE (GUIDE D2)

This guide is for businesses that:

- Already have an existing account with a HRIS approved partner.

And that:

- The HRIS provider allows for Databank searches.
- The HRIS provider allows for record creation.

1. 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. Login to your account with your HRIS provider, follow their guidance on how to you're your CONVEY account to your account with them, it should be a simple task of providing them with your CONVEY CBR ID which you will find on your settings page and your password. Once the two accounts are connected you will be able to perform searches and create records from within their software, any records you create will be automatically copied to the CONVEY Databank for you.

3. Navigate to the 'Settings' page, click on the 'account settings' tab, at the bottom of that page you will see an option that says 'Chosen Connection Type'.

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



INTRODUCTION GUIDE (GUIDE D2)

4. 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.

5. 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.

6. 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.

7. 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.

8. 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.

9. 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...