

## INTRODUCTION GUIDE (GUIDE A)

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

- Do not need to create branch accounts.
- Want to perform Databank searches in the parent account.
- Want to create records using DIRECT CONNECT in the parent account.

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 the 'settings' page (link in the top right of the screen) and upload your own logo, this will replace the CONVEY logo on the record templates and give your records a more personal look.

3. Whilst you're in your '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 HRIS options which will make those links disappear from the main menu along the left.

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.



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5. Navigate to the 'Direct Connect' page and evaluate the content of the default templates on the record templates tab to see if they meet your needs, you can view the content of each of the default records and also print a copy for your reference. You can hide all the defaults templates and just add/use your own, or use a combination of your own and our defaults, the choice is yours.

6. Add your employee details to your account on the DIRECT CONNECT page.

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.

**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...**