Support article 2Secure x Teamtailor integration

1. Introduction of your company/software

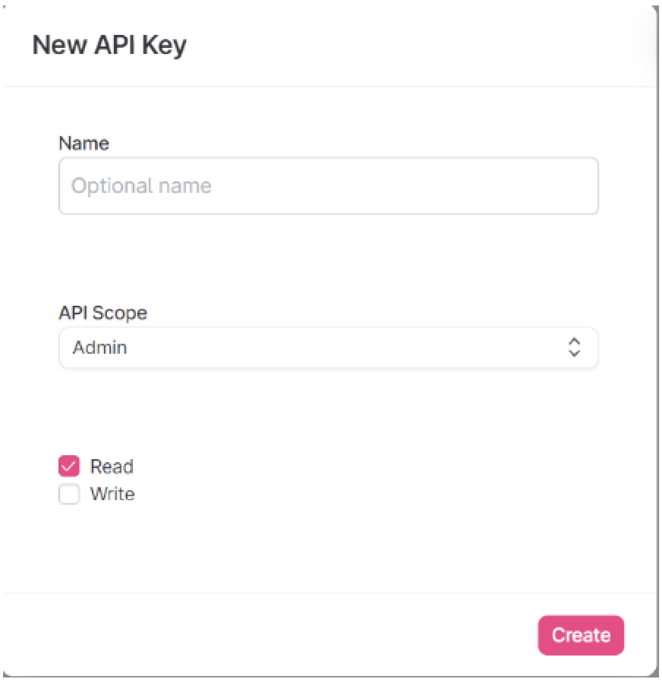
After adding the 2Secure integration with Teamtailor you are ready to seamlessly order background checks as a part of your Teamtailor candidate workflow. Please follow this article to learn how to set it up.

2. How to enable the integration

A user must have a company admin role in Teamtailor in order to be able to set up the integration.

First, you need to have an agreement with 2Secure to enable the integration, so please start by reaching out to your contact person at 2Secure, should you not have personal contact information available, please contact hrm.sales@2secure.se.

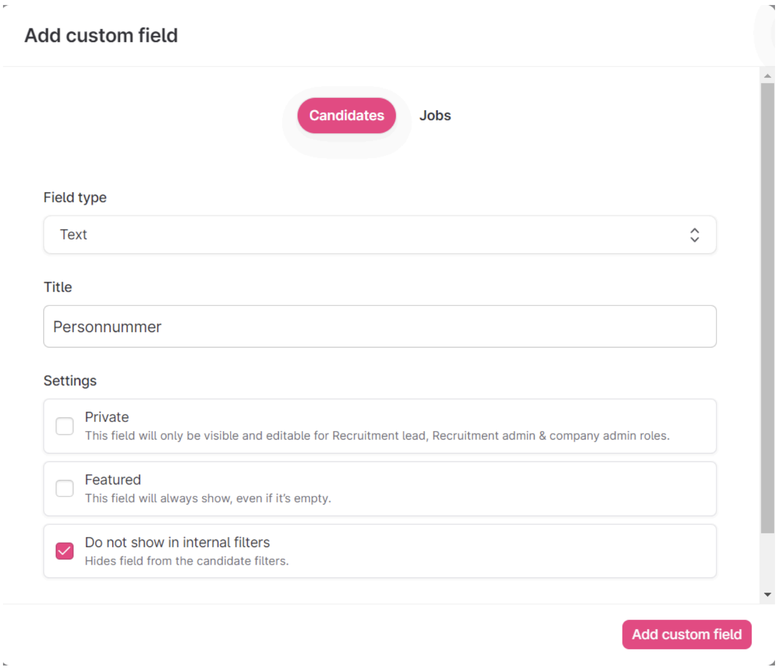
You will now need to create a Teamtailor API key. To do this please navigate to settings, then scroll down to the Integrations header on the left side of the screen and press “API Keys”. Now you should press “New API Key” and choose a name for it. (Something like “2Secure Integration” should be fine). Under “API Scope” you need to choose Admin and then press the “read”-checkbox.



When activating the integration you paste your 2Secure API key in the box, and you select your Teamtailor API key in the dropdown.

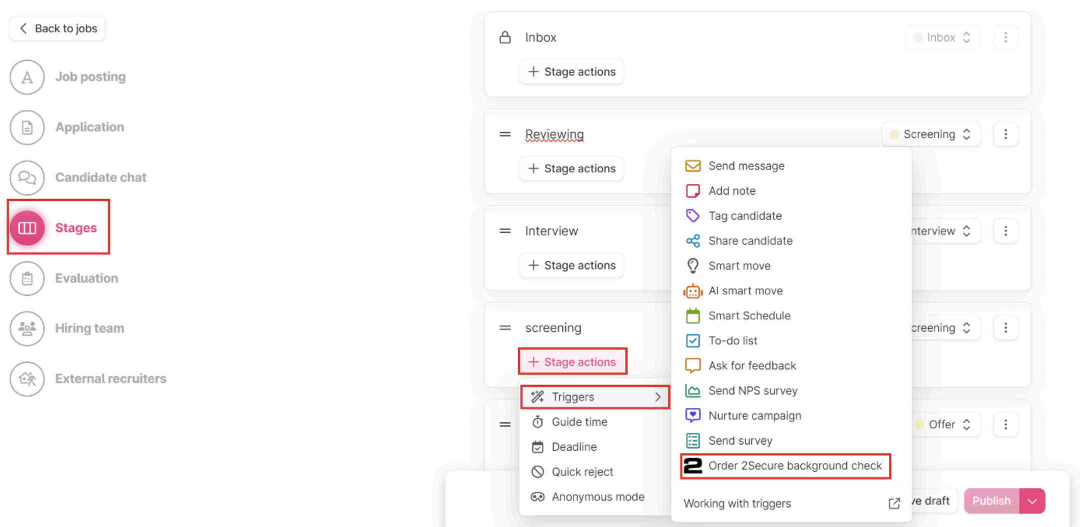
Once an agreement is in place, and the setup from both 2Secure and Teamtailors sides are completed you can get started!

First, you need to add “Personnummer” as a custom field. To do this you need to navigate to settings and then go to custom fields under the Recruitment header on the left side of the screen. Click on new custom field. Make sure the field is set on candidate and the field type should be text, you must name the field “Personnummer”. Now you can edit settings to your preferences. And when you are finished click on “Add custom field”. Please note that this field is required to be filled out for the integration to work.

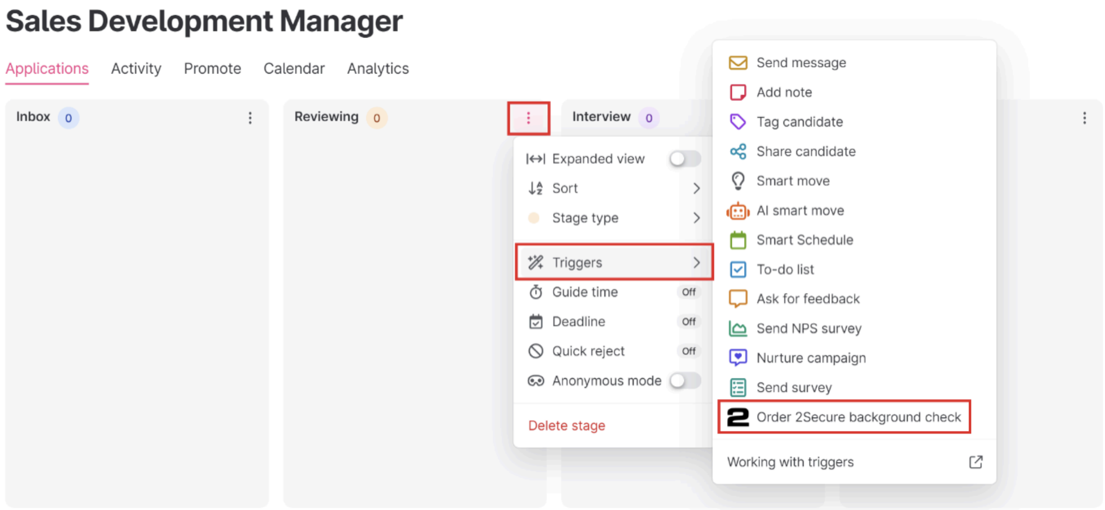


Then you add a trigger on the appropriate stage depending on when in your recruitment process you want the background check to be conducted. You can add this trigger on both new jobs you create as well as already existing jobs. We will start with how to do it for new jobs.

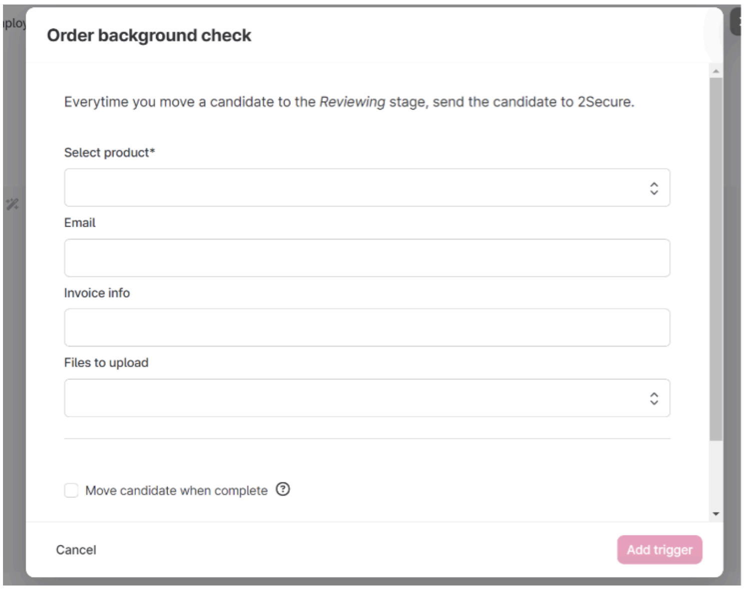
When creating a new job you can follow the same stages that you normally do until you get to the “Stages” section. Here you can use the “stage action” button on a stage and add the trigger “Order 2Secure background check”. You can do this as a part on an existing stage or create a new one just for this.



If you wish to add the “Order 2Secure background check” trigger on an already existing job you can do this by navigating to the job and press the three dots in the right corner of the stage you wish to add the trigger to, or create a new stage with the trigger in the same view.



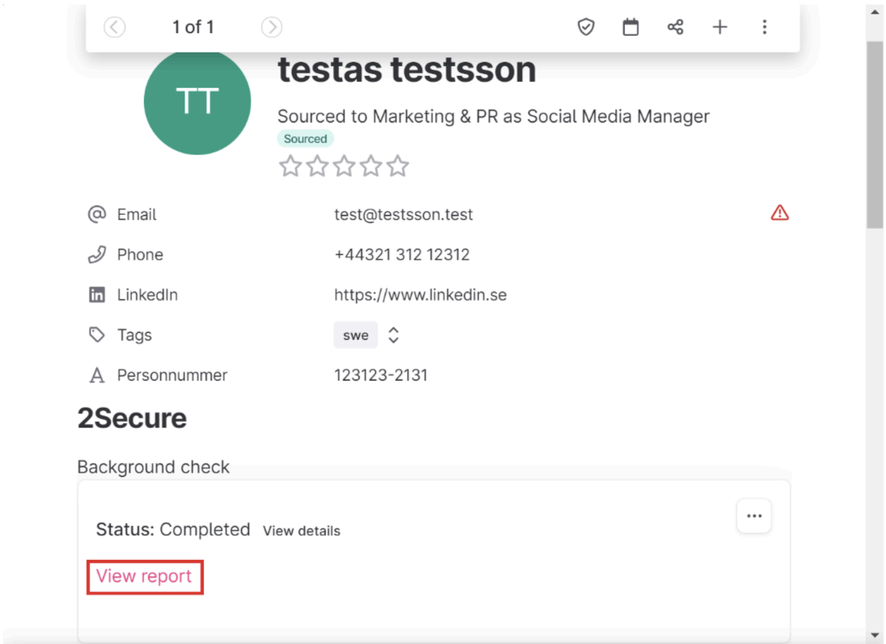
You will now be able to configure the settings of the trigger, this includes what level of background check you want to order based on the job position as well as filling in billing information, your e-mail address, and what files to upload with the order. There is also the choice of moving candidates to the next step automatically when the status of the background check is set as complete.



After you have configured these steps, the integration is ready! You can now move the candidate to the step that triggers the background check and 2Secure takes care of the rest, this includes contacting the candidate directly requesting additional information if needed.

You are always able to check the status of the background check by clicking on the candidate on the configured stage. The background check will first have the status “Sent”, as soon as 2Secure starts to process it the status will change to “Pending” and when the background check is finished the status will change again, now it will say “completed”. When the status is updated to “completed” another new button will appear that says “View report”. Pressing this will redirect you to a new page where you can view the details of the report.

Please note that the status “complete” does NOT mean that the background check contains no adverse information. It simply means that the background check is finished and ready to be reviewed.



3. Details regarding the integration

When triggering the 2Secure background check the information filled in about the candidate in the candidate card will be sent to 2Secures application. The minimum information needed for us to be able to conduct the background check is the candidates name, personal identification number and e-mail address. Preferably the candidates telephone number as well. When the background check is marked as complete the button "View report" will redirect you to the 2Secure application where you can log in and read the report.

4. Support

In case you need help with the activation/configuration of the integration or if you should face any issues, please don't hesitate to contact portalsupport@2secure.se.