hireserve

Your Guide: Hireserve ATS and Secured Signing Integration



Your Hireserve ATS and Secured Signing integration guide

Introduction

Sending out contract offers to candidates can now been done using the Secured Signing Integration.

When a candidate is progressed to “Offer” stage, a user has been registered to use the integration will be able to send the document out through the Secured Signing platform for signature.

Once the document has been signed, this will automatically appear in the candidate document area and a new Candidate History record created (NOTE: you will need to create 3 new track types, one for completion, one for rejection and one for removal).

We hope you find this document useful, but please do contact the Customer Care team if you need any further assistance.

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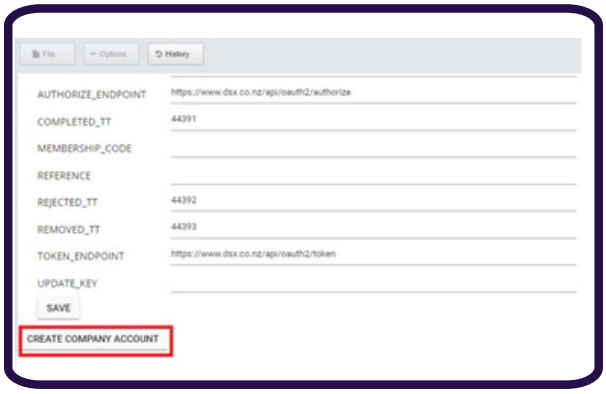
Initial Set Up

Please contact your CSM to get started

Our Support team will be able to do the initial set up for you. They will complete the API details and talk to you about the track types that need to be set up.

Once the new integrations screen is enabled:

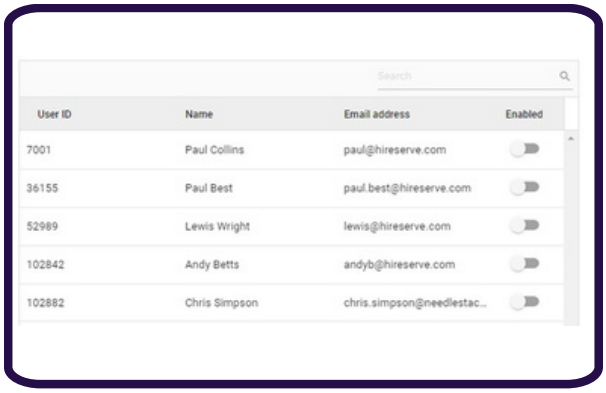
1. Click on the “Create Company” button
2. Complete your company details
3. You will receive an email from Secured Signing with further instructions



Registering the users

Once the above has been completed:

1. Head back to the integrations screen
2. You will now see a list of users with access to the ATS
3. For the users you wish to generate an account on Secured Signing for, switch the slider next to their name to enable They will then receive an email from Secured Signing to complete the process



Each user will then need to authorise their account.

- Head to the “Accounts & Settings” area by clicking on your profile button at the top right of the ATS
- You will see a section at the bottom for Connected Apps
- Click on the “Connect to Secured Signing” button
- A pop up will appear once this has completed
- You are then ready to use the integration



Sending the documents for Signature

Once you are ready to make an offer to the candidate, progress the candidate to the “Offer” stage.

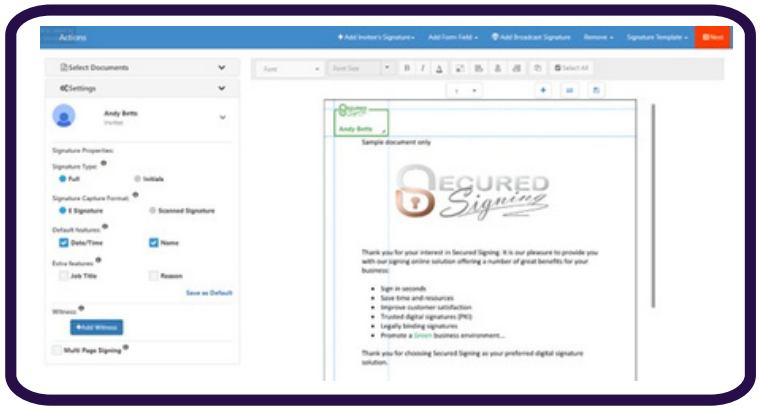
On the track type screen, you will now see a checkbox titled “Send for digital signature”. This option only appears to users who have a connected Secured Signing account (see Registering the users section)



Check the box and select the contract document to send

Log into your Secured Signing account and you will now see the document in the Inbox area

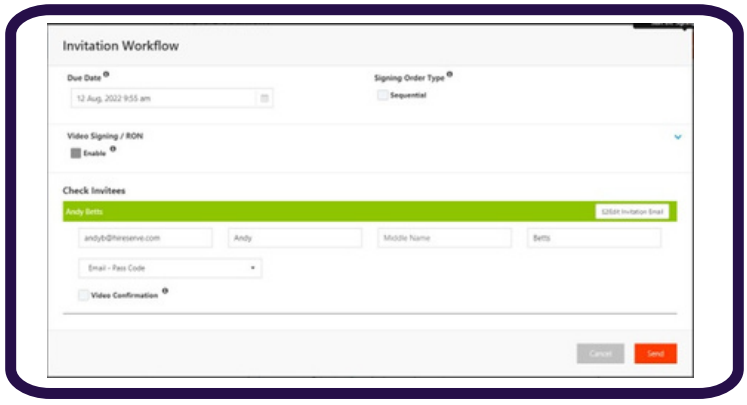
Select the document and click on the “We Sign” option at the top of the screen



Add the candidate email address (and any other signatures you require i.e. witnesses or send to your HR team to sign before the candidate)

Position the signature panel in the document and click next

Check the details are correct and click Send

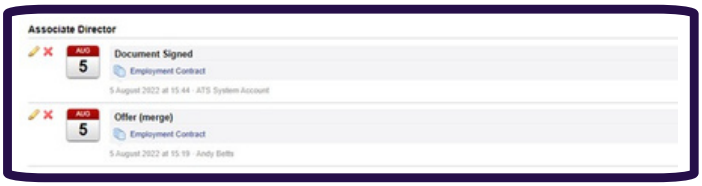


Receiving the signed document back

Once all the signatures have been gathered for the document, this will then appear in the document area for the candidate.

You will see 2 versions of the document, a signed version and the original

A new history type is also created for the candidate (NOTE: this will be done as part of the initial set up with the Support team).



Rejected Documents

If the candidate decides not to sign the document, they will be asked for a reason.

The document is then returned to the ATS and a new history type created. The reason for non-signature is also returned and stored on the history record

Removed Documents

In the Secured Signing portal, your system admin can define the length of time a document is valid before it is removed from the portal.

If that time lapses, a new history record for the candidate is created.

NOTE: All the history records will be date and time stamped.

Notifications & Document Log

Within the Secured Signing portal, the admin user will be able to configure who receives notifications and at which stage.

Typically, this will be the user that sent the document and the candidate signing (the candidate will also be able to download a copy after signing).

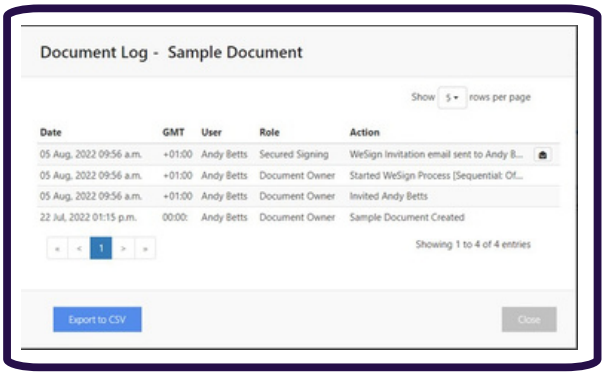
You can add as many email addresses as required for the notifications.

There is a document log for each document sent. This shows key information on who sent the document, when, when it was opened by the recipient, when it was signed and the location it was signed from.

Notifications

In Secured Signing you will be able to set up reminders to candidates to complete the signing. You can set as many as you require, either in days, or, if required, in hours.

Please speak with the Secured Signing team for further information and assistance



Need Further help?

The portal has many features and settings, including:

- Adding your own branding
- Defining the wording on the emails that are sent to the candidates when requesting signing

For more information and help with Secured Signing portal, please get in touch with them directly through their website which also has a wealth of information on the product!

There are also video guides available on the various features which can be found here:

See Secured Signing in action