

# HireRight Integration Flex Field Configuration Guide



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## Overview

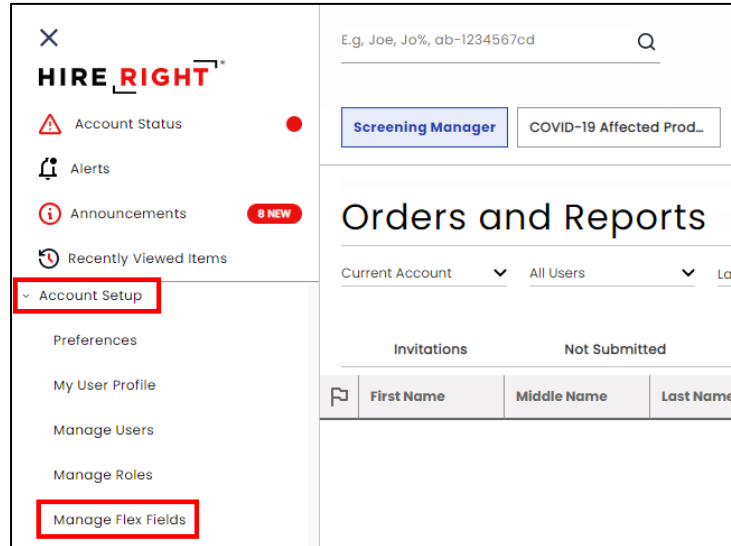
The following guide outlines the steps a customer may follow to configure new or update existing flex fields within their HireRight account(s). The sections below will outline how to add, update, and configure flex fields as well as how to enable mapping values from your integration to these flex Fields.

Please note mapping data from an integration to HireRight via a flex field differs per integration solution and not all integrations will be capable of supporting mapping values to a flex field.

For additional support, please reach out to HireRight.

## Add a New Flex Field

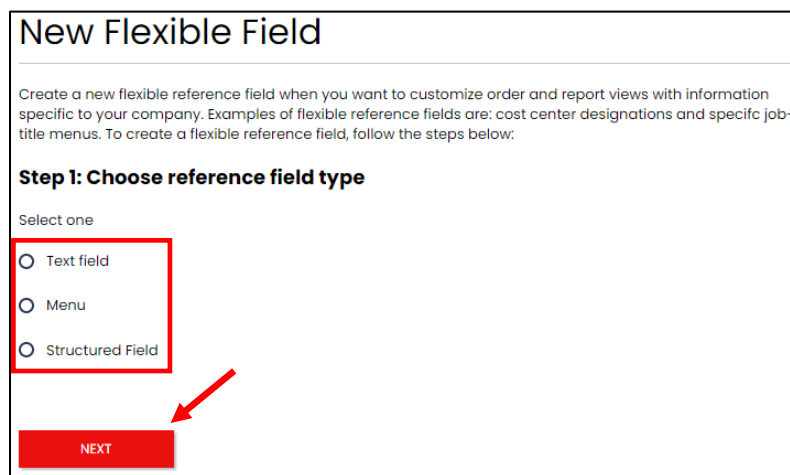
1. Login to your HireRight account, expand the **Account Setup** menu, and click **Manage Flex Fields**



2. Click the New Flex Field icon



3. Select the **Radial** of the type of flex field to create and click **NEXT**



4. Within the **Step 1: Create field labels** section complete the required fields marked with a red \*

### Step 1: Create field labels

Choose names for the flexible reference fields to determine how they will appear to users or applicants in the order view (request for information) and the list and report views.

Your label here \*

Order Interface Label

**Important: Once the name for the order interface label has been saved and submitted, it cannot be changed**

Your label here \*

Report View Label

Description - Help text

- **Order Interface Label** = The value to be displayed on the order submission form (if applicable)
- **Report View Label** = The value to be displayed on the HireRight report (if applicable)
- **Description** = Text displayed within the Manage Flex Fields menu

5. Within the **Step 2: Make this field required** section indicate if you'd like to make the flex field required during order submission for the Applicant, Recruiter, Both, or Neither

### Step 2: Make this field required

Make completion of the flexible reference field required for the recruiter, for the applicant or for both. If you do not want to make this field required, proceed to the next step.

Show as required field (\*) for Applicant

Show as required field (\*) for Recruiter

6. Within the **Step 3: Choose options for this field** section select the option(s) you wish to apply to this flex field and click **SAVE**

**Step 3: Choose options for this field**

Determine whether information in this field will be shown on list and report views and decide whether users can sort by this field. Check all that apply.

- Show on form
- Replicate (once a value is entered, it remains for subsequent requests until changed)
- Hide for Applicant
- Show in Background Report View
- Show in Results List View
- Allow sorting on this field in Results List View
- Show on Invoice
- Use for Medical History Form
- Use for Respirator Questionnaire
- Use for I-9 Form
- Use for Customer Sign-Up
- Use for Employee Screening Roster
- Use for all Monitoring Rosters
- Show in Status Messages

**SAVE** **CANCEL**

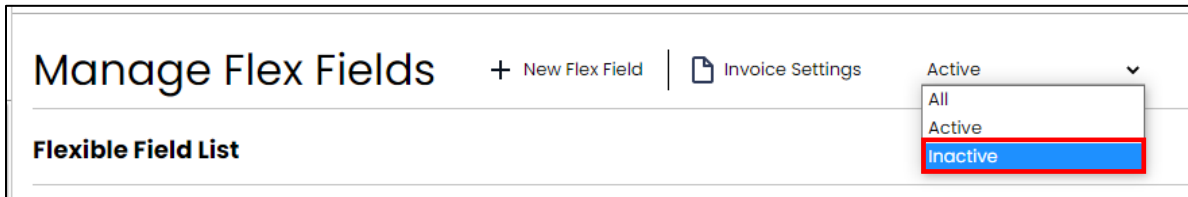
7. Review your configuration settings and click **SUBMIT** to confirm your settings or **CANCEL** to exit

- Use for Employee Screening Roster
- Use for all Monitoring Rosters
- Show in Status Messages

**SUBMIT** **CANCEL**

## Activate a New (or Inactive) Flex Field

1. Once a new flex field has been created it must be activated, within the **Manage Flex Fields** window select **Inactive** from the drop down menu



2. Find the flex field within the list, from the **Choose Action** drop down menu select **Activate**



## Activate Integration Data Mapping

1. Within the **Manage Flex Fields** window, select **Active** from the drop-down menu, find the desired flex field in the list and from the **Choose Action** menu select **Activate Data Transfer**

Manage Flex Fields + New Flex Field | Invoice Settings Active

**Flexible Field List**

1	<b>Order Interface Label:</b> Employee Number <b>Report Label:</b> Employee Number <b>Field Status:</b> Active <b>Required Field Recruiter , Allow Sorting , Report View , Result List View</b> <b>Field title:</b> Employee Number	Choose Action
2	<b>Order Interface Label:</b> Department <b>Report Label:</b> Department <b>Field Status:</b> Active <b>Allow Sorting , Report View , Result List View</b> <b>Field title:</b> Department	Choose Action
3	<b>Order Interface Label:</b> Association <b>Report Label:</b> Association <b>Field Status:</b> Active <b>Required Field Recruiter , Report View</b> <b>Field title:</b> Association	Choose Action Choose Action Edit Deactivate Activate Data Transfer

2. Input the **Unique Label Code**, check the **Tags Active** checkbox, and click **SAVE**

**Activate Data Transfer**

You can create your own tags associated with a flexible field to facilitate data transfer to and from the HireRight system. To activate data transfer tags for a field, please follow the steps below:

**Flex Field Information**

Field Type  
**Text**

Order Interface Label  
**Association**

Report View Label  
**Association**

**Step 1: Create an Unique Label Code**

In addition to the order interface and list/report view labels, you may create an unique coded label for flexible field.

Unique Label Code  
Association

**Step 3. Activate Tags**

Tags Active

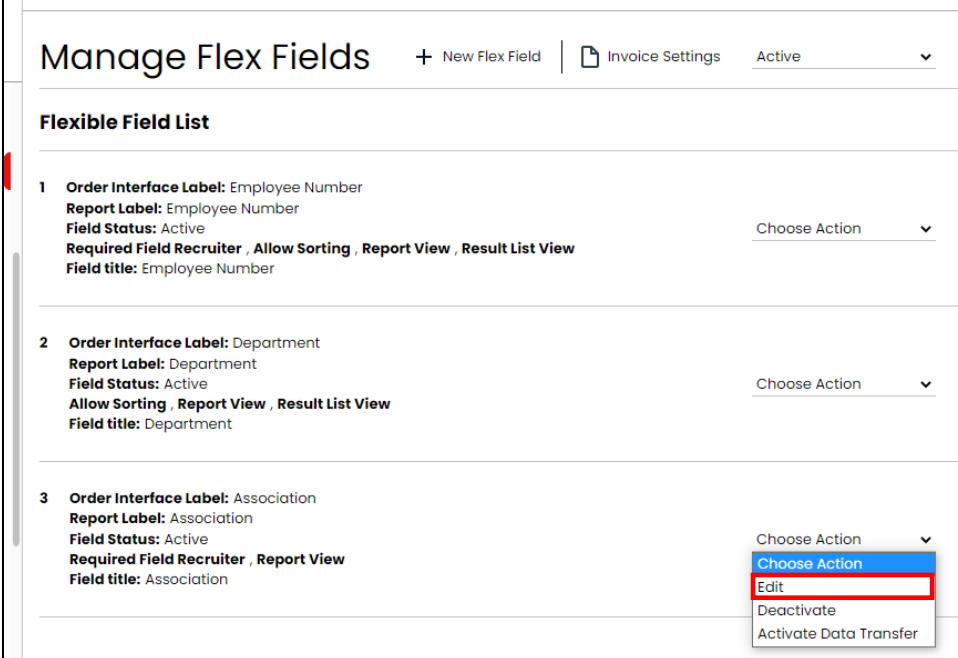
SAVE CANCEL

**IMPORTANT:** The **Unique Label Code** value MUST match the exact name of the flex field as being mapped via your integration



## Update an Existing Flex Field

1. Within the **Manage Flex Fields** window, select **Active** from the drop-down menu, find the desired flex field in the list, from the **Choose Action** menu select **Edit**



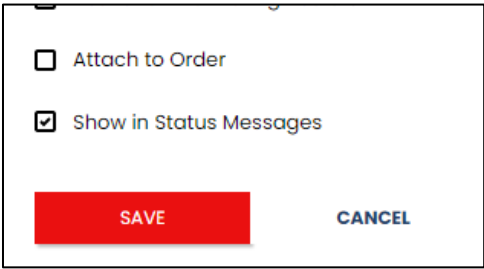
The screenshot shows the 'Manage Flex Fields' interface. At the top, there is a title 'Manage Flex Fields' and a dropdown menu set to 'Active'. Below this is a 'Flexible Field List' containing three entries:

- 1** Order Interface Label: Employee Number  
Report Label: Employee Number  
Field Status: Active  
Required Field Recruiter , Allow Sorting , Report View , Result List View  
Field title: Employee Number
- 2** Order Interface Label: Department  
Report Label: Department  
Field Status: Active  
Allow Sorting , Report View , Result List View  
Field title: Department
- 3** Order Interface Label: Association  
Report Label: Association  
Field Status: Active  
Required Field Recruiter , Report View  
Field title: Association

For the third field, the 'Choose Action' dropdown menu is open, showing options: 'Choose Action', 'Edit' (highlighted with a red box), 'Deactivate', and 'Activate Data Transfer'.

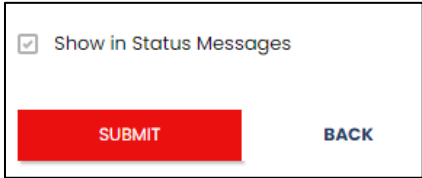
**IMPORTANT:** Flex fields updates are only effective on new orders going forward, existing orders with flex fields will not inherit these changes

2. Perform the necessary updates and click **SAVE**



The dialog box contains two checkboxes: 'Attach to Order' (unchecked) and 'Show in Status Messages' (checked). At the bottom, there are two buttons: a red 'SAVE' button and a blue 'CANCEL' button.

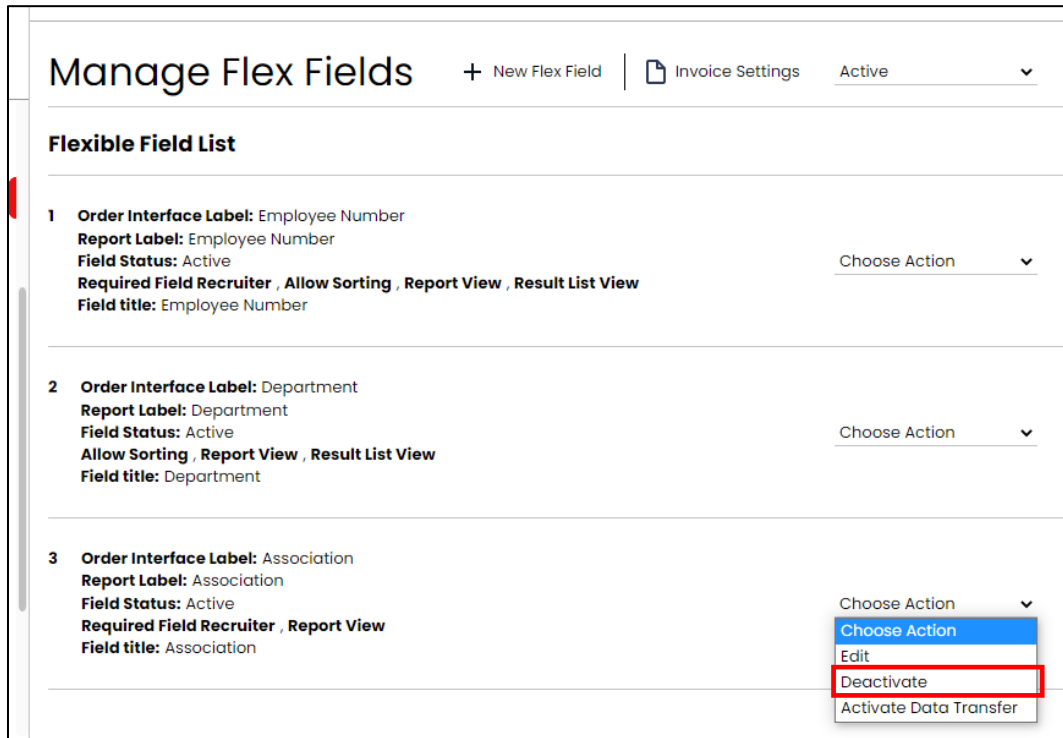
3. Click **SUBMIT** to save changes or **BACK** to make additional updates



The dialog box contains one checked checkbox: 'Show in Status Messages'. At the bottom, there are two buttons: a red 'SUBMIT' button and a blue 'BACK' button.

## Deactivate an Existing Flex Field

1. Within the **Manage Flex Fields** window, select **Active** from the drop-down menu, find the desired flex field in the list, from the **Choose Action** menu select **Deactivate**



### IMPORTANT:

- If the **Deactivate** option is not available this means this flex field is not eligible to be deactivated
- Flex fields updates are only effective on new orders going forward, existing orders with flex fields will not inherit these changes