



SkillSurvey

Implementation Guide

For Pre-Hire Source Integration with
iCIMS CXM

Contents

Integration between iCIMS CXM and SkillSurvey	3
High Level Process Overview	4
Project Plan Outline	5
Configuration & Development Checklist	6
Testing Scenarios Checklist	7

Integration between iCIMS CXM and SkillSurvey

SkillSurvey has developed an interface (Outbound API) that sends passive Candidate information (for Candidates who opt in) from SkillSurvey Pre-Hire's Source application to the Client's iCIMS CXM Candidate Relationship Management system (CXM).

The SkillSurvey Outbound API that sends the Candidate from Source to iCIMS CXM is configurable. Client field mappings determine what Candidate information is sent from Source to iCIMS CXM. SkillSurvey's Outbound API field mappings are determined on a per-customer basis.

Key things to note:

- Passing Candidate profile information, for tracking, happens in near real-time (5 to 7 minutes) from Source to iCIMS CXM.
- It is assumed that the Client is a SkillSurvey Pre-Hire customer.
- There may be implementation and annual support fees for this service. Please contact your iCIMS sales manager for confirmation and clarification.
- Processes **not** covered by the integration: The integration is outbound only (from SkillSurvey Pre-Hire to iCIMS CXM). The integration does **not** cover data flowing inbound to Source.

High Level Process Overview

1. Passive Candidates can opt into the Client's talent pipeline in the following ways:
 - Opt in as a Reference: A Reference who submits a Reference survey for a Candidate opts in via the SkillSurvey Reference Opt-In Page. Where it says, "How About You? Would you like to learn more about career opportunities at [Our Company]? If you select "Yes", someone from [Our Company] may contact you", the Reference selects **Yes** and submits a Passive Candidate Profile.
 - Opt in as a Referral: Via SkillSurvey Reference, a Candidate or New Hire provides Referral contact information. The Referral receives an email and clicks on a link. The Referral Opt-In Page displays. Where it says, Join Our Team! Would you like to learn more about career opportunities at [Our Company]? If you select "Yes", someone from [Our Company] may contact you", the Referral selects **Yes** and submits a Passive Candidate Profile.
 - Opt in from Client's Source URL: A passive Candidate clicks on the Client's Source URL. The Passive Candidate Profile page displays. The passive Candidate completes required fields and clicks **Submit**.
 - Be entered by a Recruiter: The Recruiter selects **Create Passive Candidate** on the Source dashboard screen, completes the required fields on the Create New Candidate screen, and clicks **Submit**.
 - Opt in as a Silver Medalist: In SkillSurvey Reference, the Recruiter files a Candidate as **Not Hired but Still Viable**. That Candidate is automatically created in Source as a Silver Medalist.
 - Opt in Via Source Import file: The Recruiter uploads passive Candidates to Source via an Excel file.
2. The SkillSurvey Outbound API that sends the Candidate from Source to iCIMS CXM is configurable. As previously noted, Client field mappings determine what Candidate info gets sent to iCIMS CXM, including but not limited to: opt-in date, candidate name, job title, candidate type, company name, company address, candidate years of experience, and recruiter name.
3. Once a passive Candidate has opted in, their profile information should be in two places:
 - Source Dashboard
 - iCIMS CXM

Project Plan Outline

Following is an estimated project plan to implement the SkillSurvey – iCIMS CXM interface. This is an estimate only and depends on whether the Client is mapping to SkillSurvey’s standard (pre-existing) template, or whether SkillSurvey is creating a custom template for the Client. SkillSurvey will assign an implementation manager and hold weekly calls to keep the project on track.

Estimated implementation timeframe: 1-2 weeks.

Project Deliverable	Responsibility
iCIMS to determine timeline to configure API	iCIMS Implementation Manager
Client provides field mapping to iCIMS Implementation Manager	Client & iCIMS Implementation Manager
iCIMS to test integration	iCIMS Implementation Manager
Configure Client interface	iCIMS Implementation Manager
Test Client interface	Client & iCIMS Implementation Manager
Go Live with Client interface	Client & iCIMS Implementation Manager

Configuration & Development Checklist

Following are the items required for configuration and development:

Client Checklist:

<input type="checkbox"/>	Provide field mapping to your iCIMS Implementation Manager, including but not limited to: opt-in date, candidate name, job title, candidate type, company name, company address, candidate years of experience, and recruiter name.
<input type="checkbox"/>	Test interface before going live.

iCIMS Implementation Manager Checklist:

<input type="checkbox"/>	Provide account credentials (e.g., username and password) to access iCIMS CXM.
<input type="checkbox"/>	Provide API parameters (e.g., Candidate Service URL, whether resume is byte stream or text file: source code or source label attached to each Candidate; etc.)
<input type="checkbox"/>	Map fields as provided by Client.
<input type="checkbox"/>	Confirm account credentials with iCIMS CXM.
<input type="checkbox"/>	Confirm API parameters with iCIMS CXM.
<input type="checkbox"/>	Configure integration in user acceptance testing (UAT environment).
<input type="checkbox"/>	Work with Client to test interface in UAT.
<input type="checkbox"/>	Configure integration in Production environment.

Testing Scenarios Checklist

Below are test procedures to be performed by the client prior to going live to test the integration between Source and iCIMS CXM.

These procedures allow a user to test every scenario the SkillSurvey Source integration covers.

Notes to tester:

- **When creating Candidates, References, and Referrals, use disposable email addresses such as @yopmail.com or @mailinator.com. This way, you can easily access the Candidate, Reference and Referral email accounts and complete their respective parts of the SkillSurvey Source process.**
- **The Source outbound API is real time in the standard case where a Candidate comes into Source after opting in. The one exception to this is the bulk import process. If you use the Candidate import in Source, and you check the Send to box, there will be a delay of up to 30 minutes before those imported Candidates are sent.**

Opt in as a Reference

1. As a Reference, complete and submit a reference survey in SkillSurvey Reference.
2. The SkillSurvey Reference Opt-In Page displays. Where it says, "How About You? Would you like to learn more about career opportunities at [Our Company]? If you select "Yes", someone from [Our Company] may contact you", select **Yes**.
3. The Passive Candidate Profile Page displays. Complete all required fields, which are denoted with a red asterisk (*). Select **Submit**.
4. The Reference Thank You page displays, including a link to the Company's Career site.
5. If the Career Site Link email is enabled, the Reference also receives an email with a link to the Company's Career site, in 30, 40, 60, 75 or 90 days, depending on which setting is chosen.
6. As a Recruiter, check your Passive Candidates on the Source dashboard. The Reference should be at the top of the list.
7. Check iCIMS CXM to confirm that the Reference's Passive Candidate profile was created, and that all information entered in Source is now in iCIMS CXM.

Opt in as a Referral

1. As a Candidate or New Hire, receive a Candidate or New Hire Referral email. Select the link in the email to enter Referral contact information.
2. As a Referral, receive a Referral email. Select the link in the email.
3. The Referral Opt-In Page displays. Where it says, Join Our Team! Would you like to learn more about career opportunities at [Our Company]? If you select "Yes", someone from [Our Company] may contact you", select **Yes**.
4. The Passive Candidate Profile Page displays. Complete all required fields, which are denoted with a red asterisk (*). Select **Submit**.
5. The Referral Thank You page displays, including a link to the Company's Career site.
6. If the Career Site Link email is enabled, the Referral also receives an email with a link to the Company's Career site, in 30, 40, 60, 75 or 90 days, depending on which setting is chosen.
7. As a Recruiter, check your Passive Candidates on the Source dashboard. The Referral should be at the top of the list.
8. Check iCIMS CXM to confirm that the Referral's Passive Candidate profile was created, and that all information entered in Source is now in iCIMS CXM.

Opt in from the Source URL

1. As a Passive Candidate, select the Source URL (for example:
<https://app.skillsurvey.com/ph360/?optinid=5cbe95c6-b00a-4182-9b56-095de5a55e8c>)
2. The Passive Candidate Profile Page displays. Complete all required fields, which are denoted with a red asterisk (*). Select **Submit**.
3. The Thank You page displays, including a link to the Company's Career site.
4. If the Career Site Link email is enabled, the Passive Candidate also receives an email with a link to the Company's Career site, in 30, 40, 60, 75 or 90 days, depending on which setting is chosen.
5. As a Recruiter, check your Passive Candidates on the Source dashboard. The Candidate who just opted in via the Source URL should be at the top of the list.

6. Check iCIMS CXM to confirm that the Passive Candidate's profile was created, and that all information entered in Source is now in iCIMS CXM.

Enter by a Recruiter

1. As a Recruiter, select **Create Passive Candidate** on the Source dashboard screen.
2. The Source Create New Candidate screen displays. Complete all required fields, which are denoted with a red asterisk (*). Select **Submit**.
3. A dialog displays that says, "Source Candidate created successfully". Select **OK**.
4. Check your Passive Candidates on the Source dashboard. The Candidate you just entered should be at the top of the list.
5. Check iCIMS CXM to confirm that the Passive Candidate's profile was created, and that all information entered in Source is now in iCIMS CXM.

Opt in as a Silver Medalist

1. As a Recruiter, file Candidate as **Not Hired but Still Viable**.
2. Candidate should automatically be created in Source as a Passive Candidate as a **Silver Medalist**. Check your Passive Candidates on the Source dashboard. The Silver Medalist should be at the top of the list.
3. If the Career Site Link email is enabled, the Passive Candidate also receives an email with a link to the Company's Career site, in 30, 40, 60, 75 or 90 days, depending on which setting is chosen.
4. Check iCIMS CXM to confirm that the Passive Candidate's profile was created, and that all information entered in Source is now in iCIMS CXM.

Opt in via Source Import File (via interface)

1. As a Recruiter, select **Import > Import Candidates** on the Source dashboard.
2. The Import Candidates screen displays. Map Source Field Names and Custom Questions to Uploaded File Field Names (required fields denoted with a red asterisk *).
3. Select **Start Import**.
4. Import Summary dialog displays. Dialog shows:
 - Candidates successfully imported
 - Candidates with exceptions
 - Total number candidates

5. Select **OK**.
6. The Manage Exceptions screen displays. The screen has two tabs, Candidates Successfully Imported and Candidates with Exceptions.
7. On Candidates with Exceptions:
 - a. Select a Candidate.
 - b. Scroll over the error icon to see the errors.
 - c. Correct the errors and select **Done**.
 - d. Select the edited Candidate records and select **Save** to import them.
8. Check your Passive Candidates on the Source dashboard. The Candidates you just imported should be at the top of the list.
9. Check iCIMS CXM to confirm that the Passive Candidates' profiles were created, and that all information imported into Source is now in iCIMS CXM.