CiiVSOFT INTEGRATION SETUP CHECKLIST

ITEM	CHECKED
1. Harvest API key created?	
2. Required API key permissions granted?	
3. CiiVSOFT Greenhouse User account created?	
4. Specified email address used for CiiVSOFT user account? (see below)	
5. Site Admin permissions granted for user account?	
6. Specified user specific permissions granted?	
7. Specified First name / Surname used?	
8. Details sent to CiiVSOFT Account Director?	
9. New custom pipeline stage added to job requisition template?	

IMPORTANT!

You can paste the Harvest API Key you create in Part 2 here. You will need to share this with CiiVSOFT	**PASTE API KEY HERE**
Please use the following email address format to create the USER Account in Part 3	**[clientname]@ciivsoft.com**

PLEASE ENSURE USER ACCOUNT IS CREATED WITH SITE ADMIN PERMISSIONS

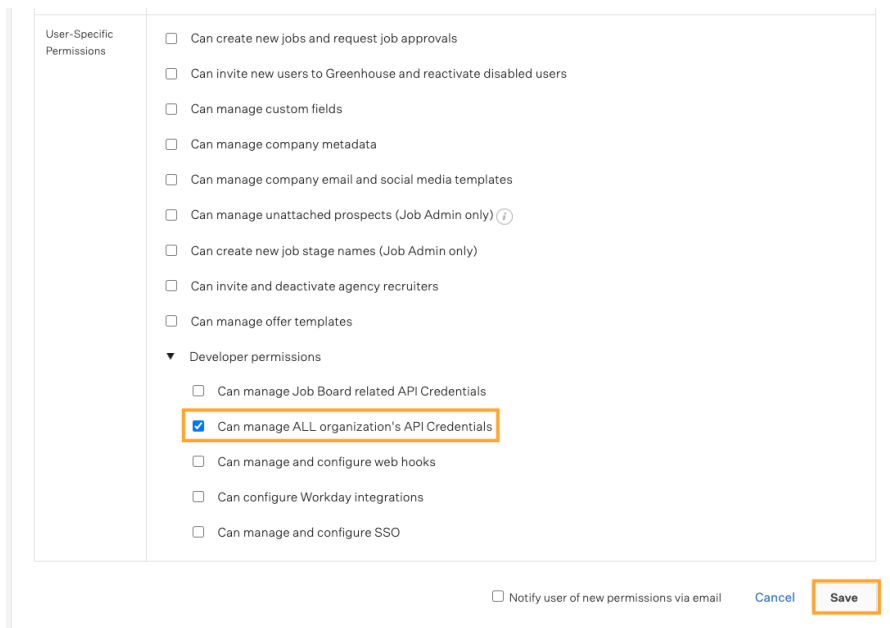# CiiVSOFT INTEGRATION API AND USER SETUP

PART 1 – CONFIGURE USER SETUP PERMISSIONS IN GREENHOUSE

In order to enable the Greenhouse/CiiVSOFT integration, you will need the permission **Can manage ALL organization's API Credentials**.

Contact a Greenhouse user in your organization with **Site Admin** level permissions with the additional user-specific permission **Can edit another user's advanced permissions** to apply the API credential management permission to your account. Have the user with Site Admin level permissions edit your user account's permissions by navigating to the **Configure** icon 🔧 **> Users > Your Name).**

The user with Site Admin level permissions should navigate to the *Permissions* panel on your user page and expand the *Developer Permissions* dropdown menu.

Select **Can manage ALL organization's API Credentials** so that a check is in the checkbox. When finished, click **Save**.
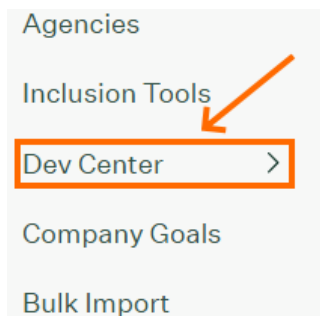

Repeat as necessary for any other user that should have access to set up the integration.
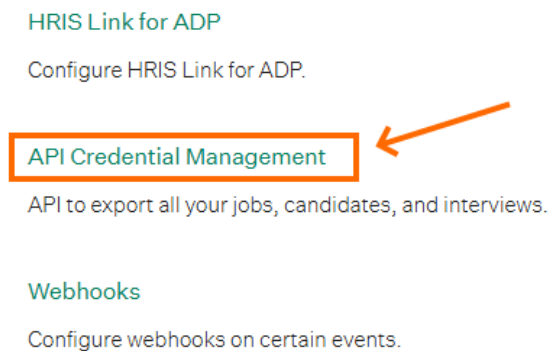
PART 2 – CREATE HARVEST API KEY

Step 1 - To create a Harvest API key for the integration, click on the '**Configure'** icon ⚙
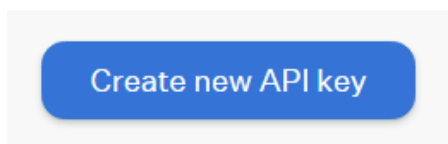in the upper right-hand corner.

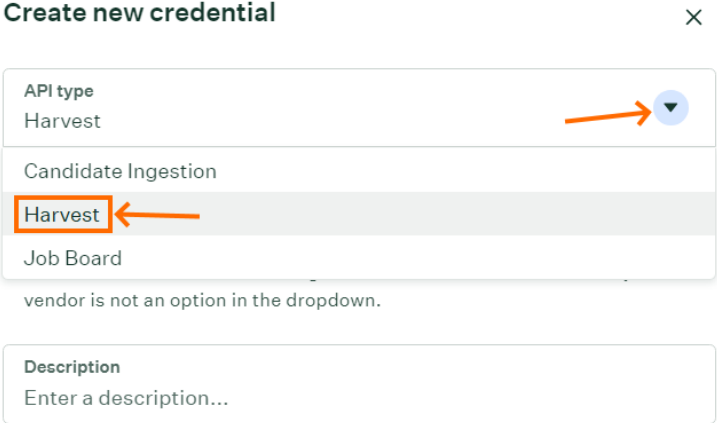**Step 2** – From the left hand menu click **'Dev Center'**

Step 3 - On the Dev Center page, click '**API Credential Management'**.

Step 4 - On the API Credential Management page, click '**Create New API Key'** in the
upper right hand side of the page.

Step 5 – In the **'Create new credential'** pop-up window, use the dropdown menu in **'API Type'** field to select **'Harvest'**.

Step 6 – In the **'Create new credential'** pop-up window, use the dropdown menu in **'Partner** field to select **'CiiVSOFT'**. CiiVSOFT is located under the 'Recruitment Optimization & Analytics' subcategory.

Step 7 (optional) – In the **'Description'** field you can enter a brief description of the API integration for reference. This is an optional step

Description
CiiVSOFT integration

Step 8 – In the **'Create new credential'** pop-up window, click **'Manage permissions'**.
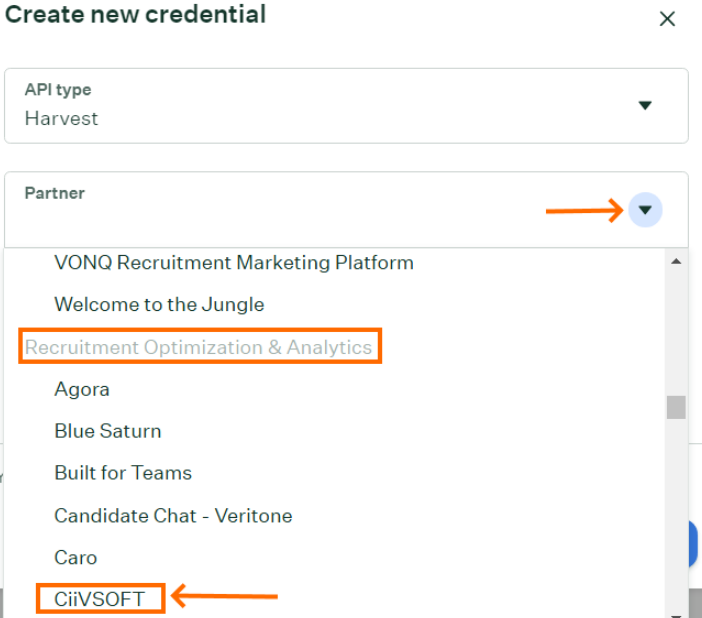
Description
CiiVSOFT integration

You will be able to manage Harvest API key permissions on the next page.
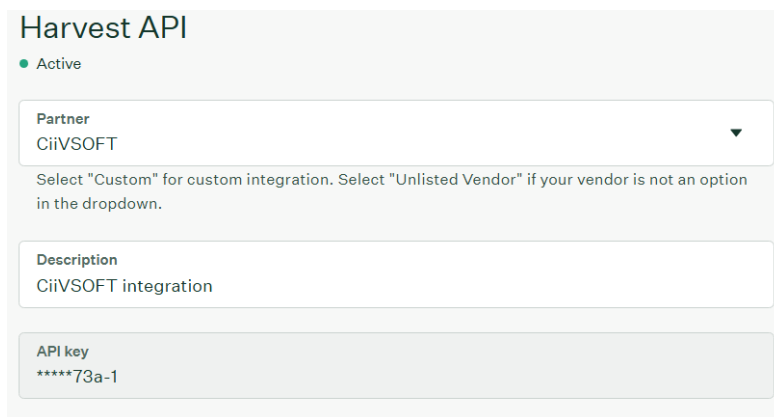
Cancel   **Manage permissions**

Step 9 – You should now see a new pop-up window called **'API Key successfully created'**. Here you will see the API key. Click 'Copy' to take a copy if the API key. Paste this somewhere safe as you will need to share this with CiiVSOFT.

API key successfully created   ✕

⚠ Copy and store your API Key in a safe place. If you lose it, you will have to create a new key.

API key
e0e0cadad6c02541e37942a38fcdc73a-1   Copy

Close   I have stored the API key

IMPORTANT! – DO NOT SKIP THIS STEP OR LOSE THE COPY OF THE API KEY AS GREENHOUSE WILL NOT ALLOW YOU TO RETRIEVE IT. IF YOU MISPLACE THE COPY OF THE API KEY, YOU WILL NEED TO CREATE A NEW API KEY FOLLOWING STEPS 1 TO 9 AGAIN.

Step 10 – Once you have safely stored the copy of the API key, click **'I have stored the API key'**.
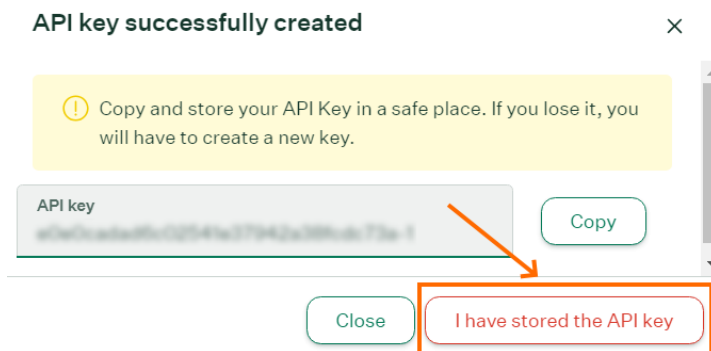
Step 11 – You will now be returned to the main **'Dev Center'** page where you will see confirmation and details of the new API key you have created.

Step 12 – Scroll down to **'Manage Permissions'** and confirm that the required API permissions are pre-selected. Greenhouse has already allocated the required permissions to CiiVSOFT. If you do not see any checkmarks please contact your CiiVSOFT point of contact.

Step 13 – Once you have checked the permissions, click **'Save'.**

Step 14 – The Harvest API key for the Greenhouse/CiiVSOFT integration is created and configured. Provide your Harvest API key to your CiiVSOFT point of contact so they can set up the integration.
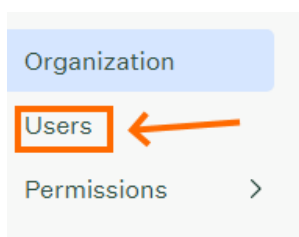
PART 3 – ADD CiiVSOFT AS A USER

A CiiVSOFT user account is required to enable advancing of recommended candidates.
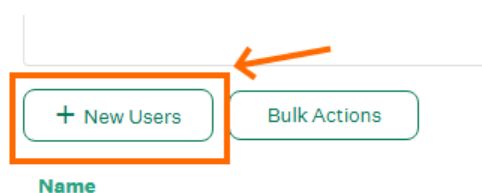
To add a user, follow these steps:

Step 1 - Click on the '**Configure**' icon ⚙ in the upper right-hand corner.

Step 2 – From the left hand menu click **'Users'**

Step 3 - Click '**+ New Users**'

Step 4 – Enter the email address in the format **[CLIENTNAME]@ciivsoft.com** where client name is your company name

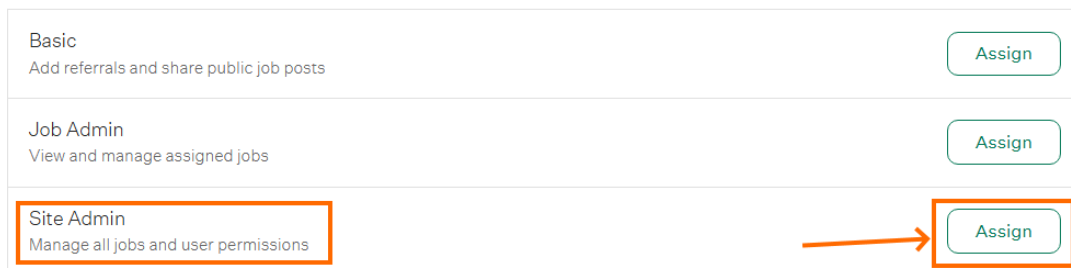**Step 5** – Set **'Site Admin'** permissions for the CiiVSOFT user by clicking **'Assign'** in the Site Admin row.

Step 6 – Ensure the following checkboxes are enabled under **'Manage Jobs'**.

Step 7 – Ensure the **'Send invitation email'** checkbox is checked, then click **'Save'**.