

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

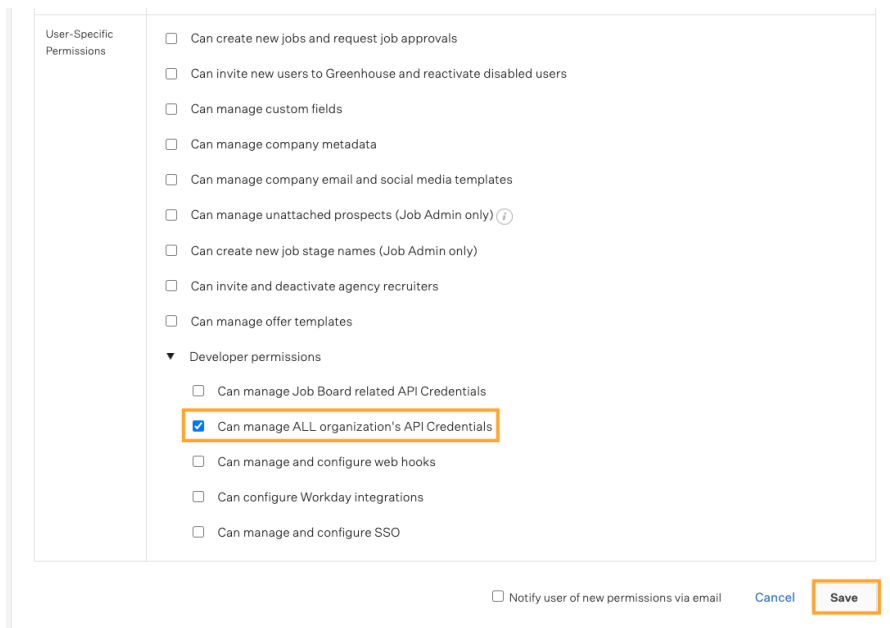
PART 1 – CONFIGURE USER SETUP PERMISSIONS IN GREENHOUSE

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**.




User-Specific Permissions

- ☐ Can create new jobs and request job approvals
- ☐ Can invite new users to Greenhouse and reactivate disabled users
- ☐ Can manage custom fields
- ☐ Can manage company metadata
- ☐ Can manage company email and social media templates
- ☐ Can manage unattached prospects (Job Admin only) ⓘ
- ☐ Can create new job stage names (Job Admin only)
- ☐ Can invite and deactivate agency recruiters
- ☐ Can manage offer templates
- ▼ Developer permissions
 - ☐ Can manage Job Board related API Credentials
 - ☒ Can manage ALL organization's API Credentials
 - ☐ Can manage and configure web hooks
 - ☐ Can configure Workday integrations
 - ☐ Can manage and configure SSO

☐ Notify user of new permissions via email [Cancel](#) [Save](#)

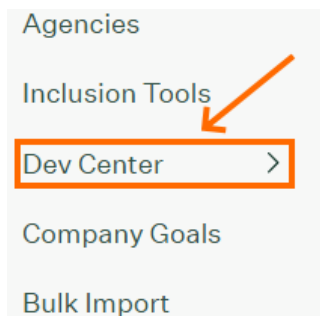
Repeat as necessary for any other user that should have access to set up the integration.

PART 2 – CREATE HARVEST API KEY

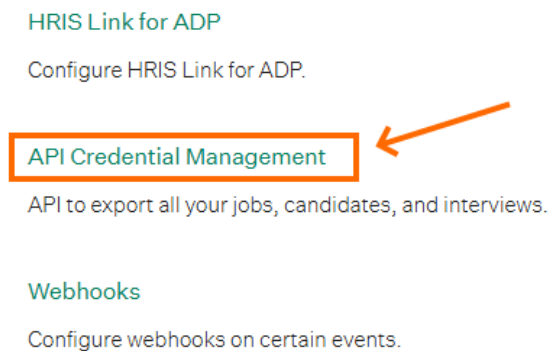
Step 1 - To create a Harvest API key for the integration, click on the **'Configure'** icon  in the upper right-hand corner.



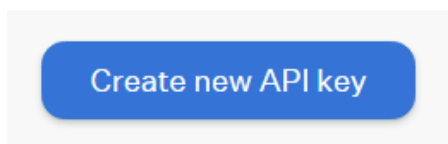
Step 2 – From the left hand menu click **'Dev Center'**



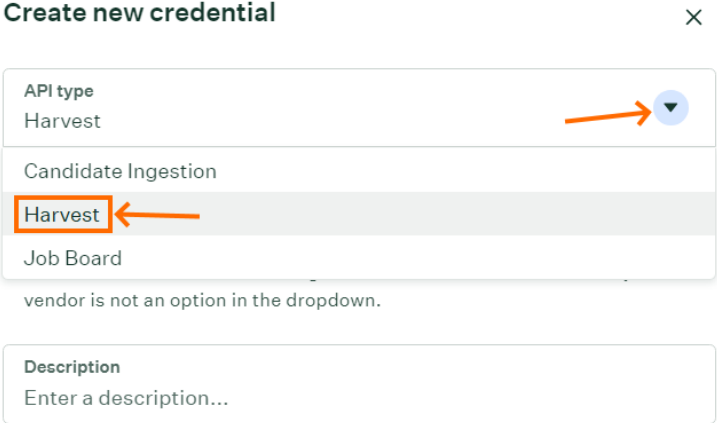
Step 3 - On the Dev Center page, click **'API Credential Management'**.



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**’.



Create new credential ×

API type
Harvest

Candidate Ingestion

Harvest

Job Board

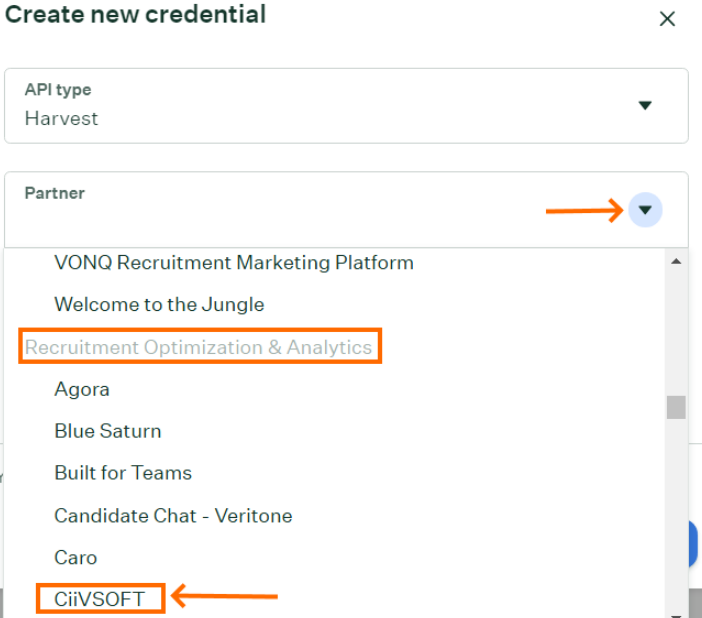
vendor is not an option in the dropdown.

Description
Enter a description...

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

[Cancel](#) [Manage permissions](#)

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.



Create new credential ×

API type
Harvest

Partner

VONQ Recruitment Marketing Platform

Welcome to the Jungle

Recruitment Optimization & Analytics

Agora

Blue Saturn

Built for Teams

Candidate Chat - Veritone

Caro

CiiVSOFT

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
CiiVSOFTE integration

Step 8 – In the ‘Create new credential’ pop-up window, click ‘Manage permissions’.

Description	CiiVSOFTE integration
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You will be able to manage Harvest API key permissions on the next page.

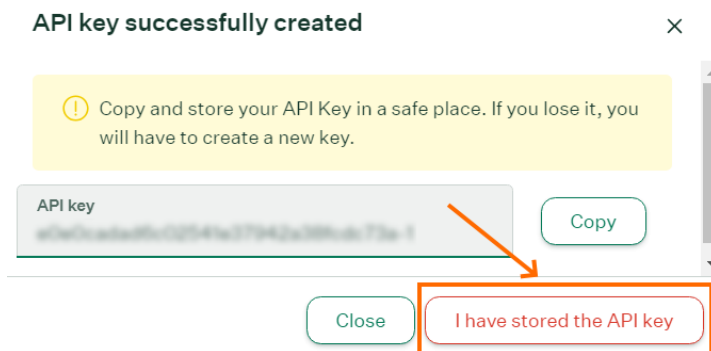
Cancel

Manage permissions

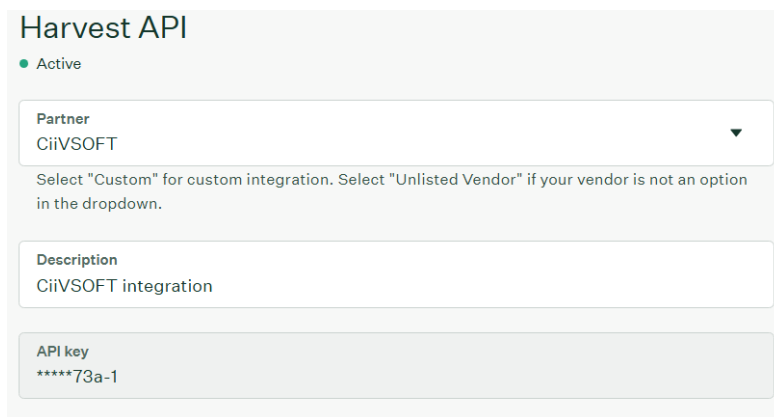
Step 9 – You should now see a new pop-up window called **‘API Key successfully created’**. Here you will see the API key. Click ‘Copy’ to take a copy of the API key. Paste this somewhere safe as you will need to share this with CiiVSOFT.

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.

- ▼ ☒ Select All
 - ▼ ☒ Harvest V1
 - ▶ ☐ Activity Feed
 - ▼ ☒ Applications
 - ☐ Delete: Delete Application
 - ☒ Get: Retrieve Application
 - ☒ Get: List Applications
 - ☒ Patch: Update Application
 - ☐ Patch: Convert a prospect
 - ☐ Patch: Update a rejected application's rejection reason
 - ☒ Post: Advance Application
 - ☐ Post: Add Attachment to Application
 - ☐ Post: Hire Application
 - ☒ Post: Move Application
 - ☐ Post: Reject Application
 - ☐ Post: Moves Application to Job
 - ☐ Post: Unreject Application

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

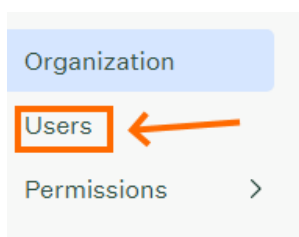
A CiiVSOFT user account is required to enable advancing of recommended candidates.

To add a user, follow these steps:

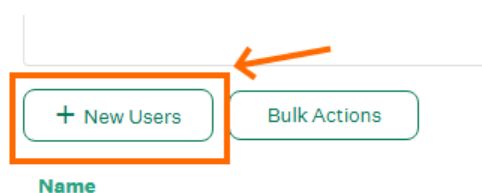
Step 1 - Click on the **‘Configure’** icon  in the upper right-hand corner.



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

1 Enter user emails (separated by commas)

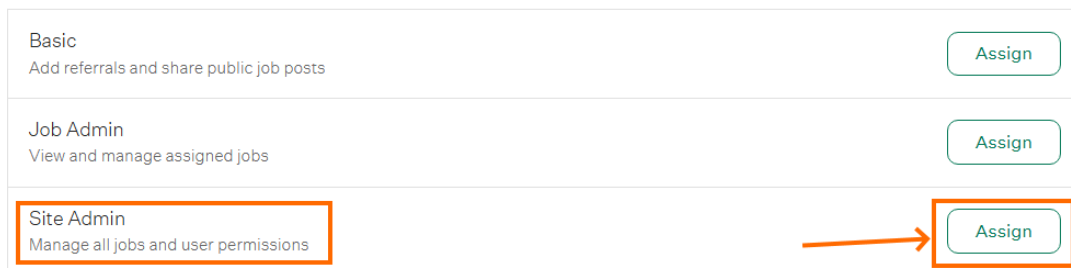


Step 5 – Set **'Site Admin'** permissions for the CiiVSOFT user by clicking **'Assign'** in the Site Admin row.

3 Set permissions

Every user must be assigned to a permission level – Basic, Job Admin or Site Admin. Then, within each user, you can edit the specific permissions to control what they'll be able to view and what actions they can take.

Basic Add referrals and share public job posts	Assign
Job Admin View and manage assigned jobs	Assign
Site Admin Manage all jobs and user permissions	Assign



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

	Manage jobs
	<input checked="" type="checkbox"/> Bulk edit jobs
Developer Permissions	<input checked="" type="checkbox"/> Manage Job Board related API Credentials
	<input checked="" type="checkbox"/> Manage ALL organization's API Credentials
	<input checked="" type="checkbox"/> Manage and configure webhooks
	<input type="checkbox"/> Configure Workday integrations
	<input checked="" type="checkbox"/> Manage and configure SSO and SCIM
	<input type="checkbox"/> Manage and configure BIC

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

<input checked="" type="checkbox"/> Send invitation email	Cancel	Save
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