symplr Contingent Talent Management (CTM): ClearConnect API Integration with Haley Marketing Career Portal

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Haley Marketing Career Portal Overview

Haley Marketing Group's Career Portal is a hosted solution that allows ClearConnect users to easily post details of job opportunities to their corporate websites and manage candidate applications from within ClearConnect. Key features of Haley Marketing's Career Portal include:

- Search Engine Optimization for each individual job opportunity, including optimization of URL, page title and meta descriptions based on job title and geographic location.

- Robust social media integration allowing jobs to be shared on Facebook, LinkedIn, Twitter, and via email.

- Ability to send jobs to job aggregators like Indeed, ZipRecruiter, and many more.

- RSS feeds of jobs by category or any search results.

- Mobile-optimized interface specifically designed for job seekers using smartphones.

- Keyword and proximity-based searching.

- Intelligent job alerts to automatically notify candidates of new opportunities.

- Automated and on-demand email marketing of job openings to encourage referrals and reactivation.

- Recruiter pictures and profiles can be associated with each job to help build relationships.

symplr CTM Integration Overview

The Haley Marketing Group Career Portal integration with symplr CTM uses the CTM API, referred to as ClearConnect, to pass data between the Career Portal and symplr CTM. Jobs are pulled from symplr CTM hourly and are posted to the Career Portal. Candidates can search for jobs and then apply. By default, candidate information is passed back into symplr CTM via the API, or a client may choose to disable this feature.

Getting Started

Before implementing the ClearConnect API integration with the Haley Marketing Group Career Portal, a Career Portal must be setup. The setup process includes creating a sub domain for the Career Portal (e.g., jobs.yourstaffingcompany.com) pointed to the IP address provided by Haley Marketing Group, creating a template for the Career Portal that will match or compliment the current website, and linking the Career Portal to the website. Your Haley Marketing Group Project Manager will assist with all of these steps.

Setting up the ClearConnect API Integration

In order to set up the Haley Marketing Group Career Portal with symplr CTM, you will need to provide the following information to Haley Marketing Group:

symplr CTM Integration Account Credentials

Create a symplr CTM user account to be used for the integration at CTM Admin Tab > User Manager. The user account should be used only by Haley Marketing, to avoid disruption to any other services you may be using with other vendors. This step must be taken in order for Haley Marketing to activate the integration with symplr CTM.

1. **CTM username:** Create a meaningful integration username such as HaleyMarketing
2. **CTM user email address:** The email address should be accessible by a CTM system administrator user or by a key contact who is working with Haley Marketing. This contact will need to receive a message to this email.
3. **CTM user account permissions:**
   a. The user account should have ClearConnect API access permission enabled.
   b. The user account should be provided with relevant permissions for the Haley Marketing team to help verify the working integration, such as access to Temp Profiles and Long-Term Order records.

   NOTE: Review the symplr CTM password policy rule settings found at CTM Admin Tab > Password Policy Configuration. Based on the expiration settings, you'll need to set a reminder and reset the password for this CTM user account near the time of the expiration date. Password resets can be completed by using the 'Forgot Credentials' link at the symplr CTM login page. Haley Marketing will need to update your account settings with this updated password when it is updated by your symplr CTM administrator.

4. Once you've created the CTM user account, the email address in the account will receive an account invite. Use the link in this invite to create a password for the API user account.
5. If you need assistance with creating a CTM user account for the Haley Marketing integration, contact ctmsupport@symplr.com.
6. Once you've successfully created a CTM user account for the Haley Marketing integration, Haley Marketing needs the following information:
    a. **symplr CTM Sitename** (value that comes after the cluster prefix in the login page URL)
        i. The CTM production URL usually starts with https://ctms.contingenttalentmanagement.com/, then the 2nd part of the URL contains the symplr CTM customer sitename, which can be located by visiting the symplr CTM login page. In the example where https://ctms.contingenttalentmanagement.com/**product_demo**/login_v3.cfm is a symplr CTM login page, the symplr CTM sitename is **product_demo**.
    b. **Integration Account username** (the username you created above)
    c. **Integration Account password** (the password you created above)
7. **Default Region ID:** The list of Regions in CTM is managed by the CTM administrator users. The names and IDs are found at CTM Admin Tab > Regions. The names and IDs are also accessible via the **getRegions** API method in ClearConnect.

symplr CTM Integration Account Credentials	
Cluster Prefix:	ctms.contingenttalentmanagement.com (standard)
symplr CTM Sitename (value that comes after the cluster prefix in the login page URL – "product_demo" in example above):	
Integration Account username:	
Integration Account password:	

Additional Settings

Additional Settings	
Description field maps to:	Multiple options to map from: Order Notes (note) or Assignment Description (teaserNote on LT orders) field?
Default Region ID:[1] (Where we will send candidates in CTM)	Numeric ID:
Default Candidate Status:[2] (Current clients are using "Prospect", but we can label status as you request)	
Default Referral ID:[3] (An option to set a default referral source ID)	Numeric ID:
Default Certification:[4] (Needed to account for applicants who don't fill out the required Certification as a result of applying with ZipRecruiter and other aggregate sites)	
Default Specialty:[5] (Needed to account for applicants who don't fill out the required Specialty as a result of applying with ZipRecruiter and other aggregate sites)	

1. **Default Region ID:** The list of Regions in CTM is managed by the CTM administrator users. The names and IDs are found at CTM Admin Tab > Regions. The names and IDs are also accessible via the getRegions API method in ClearConnect.

2. **Default Candidate Status:** The list of Candidate Statuses in CTM is managed by the CTM administrator users. The names are found at CTM Admin Tab > Status Options > Temp tab. The names and IDs are also accessible via the getTempStatuses API method in ClearConnect.

3. **Default Referral ID:** The list of Referral Sources in CTM is managed by the CTM administrator users. The names are found at CTM Admin Tab > Referral Sources tab. The IDs for the names can be obtained by selecting the Edit action on a CTM Referral Source value and getting the ReferralSourceIDout of the URL at the top of the page. The names and IDs are also accessible via the getActiveReferralSources API method in ClearConnect.

4. **Default Certification:** The list of Candidate Certifications in CTM is managed by the CTM administrator users. The names are found at CTM Admin Tab > Certifications. The names and IDs are also accessible via the getCerts API method in ClearConnect.

5. **Default Specialty:** The list of Candidate Specialties in CTM is managed by the CTM administrator users. The names are found at CTM Admin Tab > Specialties. The names and IDs are also accessible via the getSpecs API method in ClearConnect.

Once your project manager has this information, the integration will be configured, and job data will begin to flow into the Career Portal. At this time, it is recommended that you perform a complete run-through of the candidate experience, so you are familiar with the process.

If you have any questions from this point forward, please contact your project manager or Haley Marketing Success team via http://helpme.haleymarketing.com.

Posting Jobs to the Career Portal

You can choose whether to post Long Term, Per Diem, or both types of jobs - All jobs marked as Status: Open in symplr CTM will be published to the Haley Marketing Career Portal on your website. Jobs are posted, updated, and removed hourly, around the clock.

Field Mapping from symplr CTM to the Haley Marketing Career Portal

The fields in symplr CTM that will be used to post jobs to the Haley Marketing Career Portal on your website follow:

CP Field Mapping	HMG CP Field	API Fieldname	API Healthcare Display
Required Fields	title	"orderSpecialty""orderCertification"	Specialty and Order Cert values are put together to create the title
	date	dateTimeCreated (or dateTimeModified)	Created (or Date Modified)
	referencenumber	id	Order ID
	city	city	Pulled from Client Contact Record - City
	state	state	Pulled from Client Contact Record - State
	country	not supported	not supported
	postalcode	zip	zip
	description	note or teaserNote	Order Notes or Teaser Note
	category	category	Order Cert
	company	not supported	not supported
	jobtype	type	Type
	salary	Haley can map from the following fields: hourlyPayRate weeklyGrossPay weeklyRegularGrossPay totalWeeklyPayPackage	Must have Pay Package enabled in CTM

Candidate Entry into symplr CTM

When a candidate comes to the Haley Marketing Group Career Portal on your website, he or she will search through the jobs and may choose to apply. The application process follows:

1. The candidate will complete the application and submit the form.

Name*

First | Last

Email* | **Phone***

Upload Resume

Browse... No file selected.   Choose from Dropbox   Choose from Google Drive™

Please submit your resume in either Microsoft Word or PDF format. (1MB max)

⊕ Add Cover Letter (optional)

Submit This Information

2. The Haley Marketing Career Portal queries ClearConnect to see if the applicant's email address exists in any ClearConnect candidate record.

   If a match is not found, a new record will be created. An application notification is sent to the default career portal owner (routing of applications is not supported).

Field Mapping into Candidate Records

Haley Application fieldname	APIH fieldname
First Name	First Name
Last Name	Last Name
Email	Primary Email
Phone	Home Phone
Cell Phone	Cell Phone
Certification	Certification and Primary Certification
Specialty	Specialty
Address	Address
City	City
State/Province	State
Zip Code	Zip
Cover letter	not supported (data goes into myHaley/notification only)
Resume	Docs tab
Category ("Types of Jobs")	not supported (data goes into myHaley/notification only)
Referral source ("How did you first hear")	Referral Source

*Certification and Specialties fields on the Career Portal application are required for the integration.

Lists can be edited within CTM and are updated dynamically when the application loads.

Application/Registration FAQ

What happens when a candidate submits an application?
A record is created in CTM. An application notification is sent to the default Career Portal owner. In the most recent version of CTM's Long Term Assignment Manager, there's a search filter in the new version for 'Applicant Requests > With Requests'. You can also see the recent worker tags activity for specific long-term orders from the CTM Temp Profile detail page.

What happens when a candidate registers or signs up on the career portal?
Same thing happens as when someone applies for a job – a record is created in CTM. A candidate signup notification is sent to the default Career Portal owner.

Resume parsing? Candidate credentials?
There is no parsing of resumes, but the resume is attached to the candidate record on the Docs tab. The resume is also attached to the notification and stored in myHaley.

How do you know to which jobs a candidate has applied?
For Long Term jobs only, the applications are displayed in Applicant Activity on Assignments Search screen for each job, and jobs applied display on temp record under Workforce Portal > View Activity. An email notification is also generated for each application.

Apply with Indeed/ZipRecruiter process?
If enabled, Apply with Indeed or ZipRecruiter passes data back into CTM as noted above. One thing to note, CTM requires that we request a Certification and Specialty from applicants - while we are able to do so on the standard application built into the Career Portal, candidates who use different applications (Apply with Indeed quick apply, for example) will be sent with the default certification and specialty provided by you at the time of setup.

Do I have to have candidates entered into CTM?
You may request that the entry of candidate data into CTM be disabled; If this is requested, you will continue to receive application notifications, but no data will be passed via the API into CTM.

Candidate Account Management

A candidate may return to the Haley Marketing Group Career Portal at any time and login using their email and either a magic link or a password. If the candidate does not know their password, they can request a reset.

myHaley and Career Portal Customization

You will notice that there are several areas of the Career Portal that can be customized to meet your company's individual needs. For example, you may change field labels, you may turn on or off proximity search, etc.

The back-end interface for your Career Portal is called myHaley. This is where you can adjust settings for your Haley Marketing Career Portal, such as hiding, displaying or relabeling fields on your jobs, managing Category Mailings, enabling job aggregator syndication, social sharing settings, and much more. Your project manager will provide login information during the setup of your Career Portal, as well as more documentation on myHaley functions.

Because your job data comes from your ATS, you shouldn't be adding/editing/removing jobs from myHaley, but there is a lot of information that you can access there, including job views, clicks, and applications. Any changes to jobs should be made in your ATS's interface and will update hourly on the Haley Career Portal.

For details about logging into myHaley to customize your Career Portal, please refer to the Help Center: https://haleymarketing.zendesk.com/hc/en-us/articles/115000093586-Job-Board-Training-Guide