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Integrating Recruiting with Third Party Vendors

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1 Third-Party Integration with SAP SuccessFactors Recruiting

You can integrate SAP SuccessFactors Recruiting with third-party vendors used in your recruiting process.

Know Before You Start

- Make sure you have a contract in place with the third-party vendors before configuring the integration with Recruiting.
- Understand if you're using a standard or custom integration with the third party.
- Standard integrations generally require configuration and role-based permission to set them up.
- Standard integrations include:
 - SMS
 - Assessments
 - Background Checks
 - DocuSign for Online Offer

Leading Practices

- Use standard integrations, whenever possible, instead of building a custom integration.
- Get the technical integrations or get the vendor and SAP connected before completing more detailed configuration.
- You can test and validate most integrations from beginning to end in your staging instance, except for job board integrations. You can't test a complete job board integration until after going live in production.

Standard Third Party Integration Vendors

The following vendors are the supported integration partners for Recruiting.

- **Assessment Providers**
 - SHL Talent Measurement Solutions using Boomi
 - PeopleAnswers using Boomi
 - Chemistry
- **Background and Drug Check Provider**
 - First Advantage (FADV). Direct integration
- **Job Distribution**

- eQuest. Direct integration (Deprecated)
- Multiposting. Direct Integration
- Solique. Direct Integration
- **Apply with – Social**
 - LinkedIn. Direct integration – Apply with LinkedIn only.
 - Facebook. Direct Integration
 - Xing. Direct Integration
- **Electronic Signature**
 - DocuSign. Direct integration

2 Integrating Recruiting with eQuest for Job Distribution (Deprecated)

Set up an integration between eQuest and Recruiting so that you can use eQuest to post jobs on job boards.

Prerequisites

- You have eQuest logon and password to configure the integration with Recruiting.
- You have access to Provisioning.

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Context

⚠ Caution

SAP SuccessFactors has deprecated eQuest integration with Recruiting. As a result, you can remove posted jobs but you can't post a new job, update or repost an existing posting. Use Recruiting Posting to post your jobs on external job boards.

We recommended using our built-in Recruiting Posting feature to post jobs to job boards. If the job board you want to post to isn't available yet in Recruiting Posting, contact us to request it. However, if you **do** decide to use eQuest, follow these steps to set up the integration.

⚠ Restriction

- The eQuest Advantage isn't supported.
- The eQuest-Recruiting integration doesn't support mfields.
- The *Posting Start date (start)* and *Posting End date (end)* fields don't show on the *Job Requisition Detail* page. The only place to access these fields is through the *Job Postings* page.
- All users who can view the requisition can see the Intranet, Corporate, Start Date, and End Date fields. You can't control read access on these fields.
- *Job Postings Permissions* controls Job Board Postings access. Only people with rights to post jobs can see the action buttons.

Procedure

1. Go to ► [Provisioning](#) ► [Managing Recruiting](#) ► [Partner Settings](#) ► [EQuest Integration Setting](#) ►.
2. Configure settings as shown:

Recommended Settings Area	URL
eQuest URL	https://successfactors.equest.com/post/
Return URL	https://performancemanager4.successfactors.com/eQuest-Post
Recruiting 2.0 return URL	https://performancemanager4.successfactors.com/rcme-questpost
Sales Demo URL	https://salesdemo.successfactors.com/eQuestPost
Candidate Response URL	https://career4.successfactors.com/career?company=COMPANYNAME&career_job_req_id={requisition_number}&career_ns=job_listing&jobPipeline={pipeline_id}

3. Go to ► [Admin Center](#) ► [Manage External User Accounts](#) ► and click [Export all external accounts](#) to generate a .CSV file of the instance with the existing configuration.
4. Open the .CSV file. Add a row for the eQuest integration. Enter the admin login user name in the [USER_NAME](#) column, and **eQuest** in the [EXTERNAL_Partner_CODE](#) column.

→ Recommendation

Configure only one eQuest logon per company to avoid duplicate postings. The system supports multiple eQuest logins for customers who require multiple user profiles. You can map accounts to a single user or to all users with the * character in the upload.

5. On the [Manage External User Accounts](#) page, select [Import External accounts](#) and upload the modified .CSV file with the eQuest information.
6. Click ► [Admin Center](#) ► [Company System and Logo Settings](#) ►. Configure the information to display on job requisitions.
7. To configure the fields required by eQuest go to ► [Admin Center](#) ► [Set Up Job Board Options](#) ►.

Option	Description
Industry Values Set up	The options configured here map to the industry field in the Job Requisition XML. From this page, admins can select the industries applicable to the business of the customer. The fields selected appear in the dropdown list when the industry field is shown or edited on the Job Requisition XML. The dropdown includes only the selected industries.
Country and State/Province Values Set up	The selections made here map to the country and stateProvince enum fields in the Requisition XML. The country values also update the country picklist for Manage Offer Letter Templates . Admins can search a list of countries, states, and provinces to find the appropriate selections. Set up country in Company Settings . Company Settings maps the country in the Job Requisition XML.

8. Configure the <function> field in the Job Requisition XML. The <function> field is a text field restricted to a set of options. The <function> field has a Quickfind function. When a user starts typing the function of the job requisition, Quickfind lists only the functions with that text in the function name.
9. Configure the Job Requisition XML.

Fields that are marked with an asterisk are required.

Note

Mfields are not supported with the eQuest integration.

eQuest and Recruiting Fields Compared

eQuest Field	Recruiting Field
*recruiter_name	First name and last name of the Recruiter.
recruiter_email	recruiterEmail
contact_email	recruiterEmail
*location_city	city
*location_stateprovince	stateProvince
*location_postalcode	postalcode
*location_country	country
	title
*classification_type	classificationType
*classification_time	classificationTime
*function	function
*industry	industry
skills_en	
description_en	HTML ESCAPED combination of listing header, content, footer, etc.
contact_name	First name and last name of the Recruiter.
start_date	External posting's start date

Classification_type, classification_time, and country fields are also enum fields with a short list of options. The short lists for these additional enums are built in to the application, so no additional configuration (other than adding them to the Requisition XML) is required.

→ Recommendation

Include these fields in every Requisition XML and make them required. If they aren't shown or not filled in, the Recruiting user is asked to provide **all**

```
<field-definition id="classificationType" type="enum" required="true"
custom="false">
<field-label><![CDATAClassification Type&linkCreation=true&fromPageId=6065099"
class="createlink"linktype="raw" linktext="Classification Type|Classification
Type">Classification Type]></field-label>
<field-description><![CDATAClassification Type&linkCreation=true of this
information before the job
post.<field-definition id="classificationType"
type="enum" required="true" custom="false">
&<fromPageId=6065099" class="createlink"linktype="raw" linktext="Classification
Type|Classification field-label
Type">><Classification Type!<![CDATAClassification Type]&>linkCreation=true</
field-descriptionfromPageId=6065099" class="createlink"linktype="raw"
linktext="Classification Type|Classification Type">> Classification Type
]</field-definition></field-label
```

→ Recommendation

You can label these fields in the Job Requisition XML template. For example, if the customer already uses the term **Function** on the Location filter, you can relabel the function field.

10. Configure eQuest field permissions in the Job Requisition XML. To ensure that the system provides values, set eQuest fields to require the preapproval stage. You can assign read and edit permissions as the client wishes.
11. Click ► [Provisioning](#) ► [Company Settings](#) ► [Enable Job Board Posting - eQuest](#) ►.
12. Grant users the right to post jobs. Go to ► [Admin Center](#) ► [Recruiting Permissions](#) ►. Check the box for [Grant eQuest Job Postings Permission](#). eQuest Job Postings Permission allows a user or group of users to manage the [External Job Boards](#) table on the requisition [Job Postings](#) page. Anyone who can view the requisition can see both tables on the [Job Postings](#). However, only those individuals with posting privileges can modify the [External Postings](#) table.

Related Information

[Administrator Tasks for Recruiting Posting](#)

2.1 Posting a Job to eQuest (Deprecated)

Post a job to eQuest, if you're using the legacy third-party integration.

Context

⚠ Caution

SAP SuccessFactors has deprecated eQuest integration with Recruiting. As a result, you can remove posted jobs but you can't post a new job, update or repost an existing posting. Use Recruiting Posting to post your jobs on external job boards.

Procedure

1. From Recruiting, hover over one of the job requisitions.
2. Select [Job Postings](#).
3. Select [Add Job Boards](#) and ensure that all required information is given. Then, you will be taken to eQuest. This page shows a list of the board the user's company has pre-purchased postings from.
4. Select a board to post on and click [Post Job](#). At this point, the information will be passed through eQuest to the individual job boards, and the prepaid count will be decreased by one for each selected board.
5. After the postings are submitted, the recruiter is then brought back to the requisition's Job Postings page. Now the lower table should be populated with the job boards selected from eQuest.

Modifying posts updates all job boards with the current information on the Job Requisition. If any information has changed on the requisition, all of the most recent information will be sent to eQuest. Users cannot select individual boards to update. All boards are updated at the same time.

2.2 Setting Up Job Board Options

The allowable values for the industry, country/region and state/province fields on the requisition are set up using [Set Up Job Board Options](#).

Prerequisites

You have the [Set Up Job Board Options](#) role-based permission.

Context

eQuest integration with job postings is deprecated and you'll no longer see ► [Company Settings](#) ► [Recruiting](#) ► [Enable Job Board Posting - eQuest](#) option in Provisioning. If you have the required role-based permission, you'll continue to see the [Set Up Job Board Options](#) admin tool where you can set up values for industry, country/region, and state/province fields. You don't need to enable any separate switch in Provisioning to see this tool in Admin Center.

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Procedure

1. Go to ► [Admin Center](#) ► [Recruiting](#) ► [Set Up Job Board Options](#) ►.

You have options to configure [Industry Values Set up](#) or [Country/Region and State/Province Values Set up](#).

2. Choose [Industry Value Set up](#).

The options configured here map to the `industry` field in the Requisition XML. As an admin user, you can configure the industries applicable to the customer's business. The selected fields appear in the dropdown list when the `industry` field is shown or edited on the Job Requisition XML.

3. Choose [Country/Region and State/Province Values Set up](#) to configure the list of countries/regions and states/provinces.

The option [All](#) displays the complete list of countries/regions and states/provinces on the Job Requisition Details page. Choose [Custom Select](#) if you want to restrict the list. Search for countries/regions by name or two-digit code and add them to the list.

When a country/region is selected, all states/provinces in that country/region are available by default. If you don't need all states, take the additional step of selecting only the desired states/provinces within a selected country/region.

4. Select [Finish](#) and save your changes.

3 Integrating Recruiting with First Advantage for Background Checks

Integrate SAP SuccessFactors Recruiting with the third-party vendor First Advantage, so you can initiate and view background checks and drug screens directly from Recruiting.

Prerequisites

- You have access to Provisioning.

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

- Ensure that you've enabled *SFAPI Webservices* in Provisioning.
- You have an existing contract with First Advantage and have obtained the necessary URLs and credentials for the integration.

→ Remember

The Xchange password for First Advantage must be changed every 60 days.

- You have the following permissions:
 - *Allow Admin to Access OData API through Basic Authentication*
 - *First Advantage Background Check Integration Settings*
 - *Background Check Initiate Permissions*

Procedure

1. In *Admin Center*, go to ► *Recruiting* ► *Background Check Central* ► *Enable Background Check* ► *First Advantage Background Check Integration Settings* ► and enable the First Advantage background check.
2. In Provisioning, go to ► *Managing Recruiting* ► *Partner Settings* ► *First Advantage Integration Settings* ►, and configure the settings as necessary.
3. Enter the following integration URLs provided by First Advantage. URLs can be case-sensitive, so please ensure that you enter them **exactly** as provided.
 - Background Check Request URL for DA
 - Background Check Order Status URL
 - Background Check View Report URL

- Background Check Candidate Order Status URL
 - Background Check Get Accounts URL
 - Background Check Get Packages URL
4. In *Admin Center*, go to ► *Password Policy Settings* ► *Settings* ► *Set API Login Exceptions* ► *Add* . Enter the IP addresses that the ODATA (Push) status responses are sent from, and set the minimum password age as -1.

Include the following IP addresses:
 - 198.73.226.0 to 198.73.226.23
 - 66.241.32.160
 - 66.241.32.158
 - 66.241.55.193
 - 10.8.248.10
 5. Share the URL pattern for OData access with First Advantage ([https://<hostname>/odata/v2/restricted/upsert?\\$format=json](https://<hostname>/odata/v2/restricted/upsert?$format=json)). Here are some examples of how these URLs could look:
 - DC8 Preview – [https://api8preview.sapsf.com/odata/v2/restricted/upsert?\\$format=json](https://api8preview.sapsf.com/odata/v2/restricted/upsert?$format=json)
 - DC8 Production – [https://api8.successfactors.com/odata/v2/restricted/upsert?\\$format=json](https://api8.successfactors.com/odata/v2/restricted/upsert?$format=json)
 - DC5 Preview – [https://api8preview.sapsf.eu/odata/v2/restricted/upsert?\\$format=json](https://api8preview.sapsf.eu/odata/v2/restricted/upsert?$format=json)
 - DC5 Production – [https://api5.successfactors.eu/odata/v2/restricted/upsert?\\$format=json](https://api5.successfactors.eu/odata/v2/restricted/upsert?$format=json)
 6. In Provisioning, add the First Advantage Account and Package field to the job requisition XML for any relevant requisition templates.

Sample Code

```
<field-definition id="fadvAccountPackage" type="derived" required="false"
custom="false">
  <field-label><![CDATA[Fadv Account Package]]></field-label>
  <field-description><![CDATA[Fadv Account Package]]></field-description>
</field-definition>
```

7. Also in Provisioning, add or edit the **backgroundCheck** feature permissions to the applicable job requisition templates. These permissions are same as the Verifications, Inc. background check permissions.

Sample Code

```
<feature-permission type="backgroundCheck">
  <description><![CDATA[R can launch on-boarding emails during statuses with a
Hired category]]></description>
  <role-name><![CDATA[R]]></role-name>
  <role-name><![CDATA[G]]></role-name>
  <status><![CDATA[Offer]]></status>
</feature-permission>
```

8. In *Admin Center*, go to ► *Managing Recruiting* ► *First Advantage Background Check Integration Settings* , and configure the First Advantage background check integration settings.

Settings and Mappings	Action
Settings	• E-mail applicant: This is a two-step process where SAP SuccessFactors sends applicant data to First Advantage; and First Advantage contacts the candidate to invite them to fill out the missing background check data. • Allow account and packages to be selected at the application level: Users with the appropriate permissions can add, edit, or remove account and package combinations from the job application page. All updates are reflected in both the job requisition and job application fields.
Accounts and Packages	Synchronize accounts and packages from First Advantage.
Parent Field Selection	Here you can select a job requisition picklist field as a parent field for the First Advantage account field. This refines the list of selectable accounts based on the parent field data selection.
Job Requisition	Map Job Requisition fields from each Job Requisition XML templates to the corresponding First Advantage fields. Note You can't map the user-defined fields Due Date or Post Job Language in the Job Requisition. Additionally, Employment Type mapping only supports current or prior values.
Job Application	Map Job Application fields from each Job Application XML template to the corresponding First Advantage fields.
Candidate Profile	Map Candidate Profile fields from the Candidate Profile XML template to the corresponding First Advantage fields Background Elements.
Background Elements	Map additional information from the Candidate Profile to First Advantage to send these fields to First Advantage when a background check or drug screen order is submitted.
API Credentials	Enter First Advantage API credentials (provided by First Advantage).

9. If you're using different identifiers in SAP SuccessFactors and First Advantage, map SAP SuccessFactors employee usernames to the employee usernames in First Advantage. You can do this in [Admin Center](#) under [Managing Recruiting](#) > [Manage External User Accounts](#).
10. Export all external accounts and update the external accounts .csv file.
 - **USER_NAME:** The user names of SAP SuccessFactors users who need permission to access the First Advantage system
 - **EXTERNAL_PARTNER_CODE:** Use FADV
 - **PARTNER_USERNAME:** Employee's username in First Advantage
 - **PARTNER_PASSWORD:** This isn't required, so you can leave it blank.

Caution

If you're using another integrations, ensure that you have the appropriate passwords for the accounts included in the exported file. If you upload this file without passwords for the existing accounts, it deletes the existing password and prevents you from using the other integrations.

Related Information

[List of Role-Based Permissions](#)

[Initiating a Background Check with First Advantage \[page 15\]](#)

[Standard Field Mapping in First Advantage \[page 16\]](#)

3.1 Initiating a Background Check with First Advantage

Assign background check packages to job requisitions, and then initiate the background check for candidates.

Prerequisites

You've configured the selectable accounts and packages.

Procedure

1. Go to  [Admin Center](#)  [Recruiting](#)  [Job Requisition](#) .
2. Select one or more account and package combinations while creating a Job Requisition for [Fadv Account Package](#). Ensure that the status is [Background Check](#).
3. Choose [Initiate Background Check](#) at the top of the Application page, and select a background check order creation method. This option is only displayed when a candidate is in a Background Check applicant status.

You see a popup of all configured accounts and packages for the job requisition. You can only select one account and package combination per requisition.

Results

After the background check is initiated, Recruiting users can see background check results in the [Background Check Status](#) portlet on the application.

📘 Note

To update the information on the portlet, click [Refresh](#). To see the First Advantage report for the candidate, click [View Report](#). You can resubmit the same package and account combination for the same candidate on the same job, but as a different order.

→ Remember

Clicking [View Report](#) creates a new report. The URL that is generated is one-time use only; it can't be copied, pasted, or bookmarked for later use.

Related Information

[Integrating Recruiting with First Advantage for Background Checks \[page 12\]](#)

[Standard Field Mapping in First Advantage \[page 16\]](#)

3.2 Standard Field Mapping in First Advantage

Review the First Advantage fields that are mapped from Recruiting.

First Advantage Field	Mapped From Recruiting
User Defined Field 1	Job Requisition
User Defined Field 2	
User Defined Field 3	
User Defined Field 4	
User Defined Field 5	
User Defined Field 6	
Date of Birth	Job Application
Gender	
Candidate has SSN	
Government ID issuing country	
SSN or Government ID like Canadian SIN or Passport number	
Government ID Issuing Authority	

First Advantage Field**Mapped From Recruiting**

Charge or Complaint

Case Classification

Date of Charge

Criminal History State

Criminal History Municipality Type

Criminal History City or County Name

Charge description

Reference Type

Reference's Given name

Reference's Family name

Reference's State ISO standard

Reference's ISO Country Code

Number of years the reference has known the search subject

Reference's phone number

Reference's phone number extension

Reference's email address

The branch of the military the candidate was assigned

Given Name

Candidate Profile

Family Name

Middle Name

Maiden Name

Suffix

Local Language Name

Father's Last Name

Mother's Last Name

Mother's Maiden's Last Name

First Advantage Field	Mapped From Recruiting
Zip Code	
State	
City	
Country	
Address 1	
Address 2	
Apartment or House Unit	
Phone Number	
Phone Number Extension	
Email Address	
Employer Type	Candidate Profile > Background Element > Employment
Employer name	
Employer Postal Code	
Name of the employer in the local language	
Employer State	
Employer City	
Employer Country Code	
Employer Address 1	
Employer Address 2	
Title of position held	
Employment location for a date range	
Employee ID	
Department where the employee works	
Current or ending compensation	
Compensation interval	

First Advantage Field**Mapped From Recruiting**

ISO currency code identifying the currency of a monetary amount

Employer contact name

Employer contact email address

Employer contact phone

Reason for leaving previous employer

Permission to contact employer to verify position related details

School Type

Candidate Profile > Background Element > Education

School Name

Name of the school in the local language

School's City

School's internet email address

School's Contact Number

School's Contact telephone extension

School's State

Degree Measure Type

Degree Type

Grade Point Average (GPA) value

Major field of study

Location of the school attended

School's country code

School's postal code

School Address

School's Organization Unit Location

Degree Measure Value

Degree Measure

First Advantage Field	Mapped From Recruiting
License Issuer country code	Candidate Profile > Background Element > License
License Number	
License Name	
License Description	
License State	
License First Name	
License Middle Name	
License Last Name	
License suffix	
License Issuing Agency's Postal Code	
License Issuing Agency's State	
License Issuing Agency's City	
Candidate's name as it appears on the License	
Name of the Agency that issued the license	
Name of the License issuing Agency in the local language	
Address line of the License Issuing Agency	
License issuing Agency's Contact Phone	
Status of the issued License	

Related Information

[Integrating Recruiting with First Advantage for Background Checks \[page 12\]](#)

[Initiating a Background Check with First Advantage \[page 15\]](#)

4 Integrating Recruiting with Other Third-Party Vendors for Background Checks

Integrate SAP SuccessFactors Recruiting with third-party background check vendors, other than FirstAdvantage, so you can initiate and view background checks and drug screens directly from Recruiting.

Prerequisites

You have the *Background Check Central* permission.

Context

You can configure standard fields in the Job Requisition template so you can use them with the third-party background check integration. You can also define additional customer fields. Include all relevant fields on the integration template for the background check vendor.

Procedure

1. Go to ► *Admin Center* ► *Recruiting* ► *Background Check Central* ►.
2. Enable the *Other Background Check Vendor* option.
3. Click *Save*.
4. **Optional:** Define the `bgiAccountId` standard field on the Job Requisition XML.

You can set up multiple accounts with a single third-party background check vendor. This field allows recruiters to specify which of those accounts to use.

Sample Code

```
<field-definition id="bgiAccountId" type="picklist" required="false"
custom="false">
  <field-label><![CDATA[Account ID]]></field-label>
  <field-description><![CDATA[Account ID]]></field-description>
  <picklist-id>accountId</picklist-id>
</field-definition>
```

5. **Optional:** Define the `packageId` (custom) field on the Job Requisition XML.

Background check vendors often offer services in packages. When this field is configured and has required permissions, recruiters can select the package they wish to apply to the requisition.

Note

Standard picklists only allows for selecting one value at a time. If you want to configure a picklist where you can select multiple values, configure the picklist as a multiselect or *mfield*, or request that the vendor merge the desired packages.

Sample Code

```
<field-definition id="packageId" type="picklist" required="false"
custom="false">
  <field-label><![CDATA[packageId]]></field-label>
  <field-description><![CDATA[package]]></field-description>
  <picklist-id>packageId</picklist-id>
</field-definition>
```

6. **Optional:** To associate a cost center within your company with the job requisition, define the `costCenterId` (standard) field in the Job Requisition template.

Sample Code

```
<field-definition id="costCenterId" type="picklist" required="false"
custom="false">
  <field-label><![CDATA[costCenterId]]></field-label>
  <field-description><![CDATA[costCenter]]></field-description>
  <picklist-id>costCenterId</picklist-id>
</field-definition>
```

Next Steps

Now that you have enabled background checks with external third-party vendors, you can create vendors for background checks and later create and define the integration center templates.

4.1 Creating Vendors for External Background Checks

Create vendors who you want to carry out your external background checks.

Procedure

1. Go to [Admin Center](#) > [Manage Data](#).
2. In the [Create New](#) dropdown field, select [Recruiting External Vendor](#).
3. Enter the [External Code](#).

⚠ Caution

This is a text string used as a code for the background check vendor. The OData API entities use this value for communication between the third-party vendor and SAP SuccessFactors. If this information isn't correctly entered, some integration scenarios might not work.

4. Enter the *Vendor Name*.
5. Select *Background Check* from the *Integration Type* dropdown.
6. Click *Save*.

Next Steps

In the *Search* dropdown, select **Recruiting External Vendor** and then select the vendor you created from the associated dropdown menu. Ensure that the vendor information is correct.

4.2 Creating the Integration Center Templates for External Background Checks

Create templates in the Integration Center to support external background checks for Recruiting.

Prerequisites

To do a background check of a candidate before actually scheduling an interview, you require an Application/UI-triggered integration created and mapped to a corresponding background check vendor. Ensure that you've enabled *Allow users to execute "Application/UI" or "Event-based" Integrations* permission to a *Recruiter* role to run any Application/UI based integration.

📘 Note

As a recruiter, you don't need the mandatory permissions to initiate background checks using *Integration Center*. However, to use *Integration Center* for modeling and executing the integration, you **do** need the following mandatory permissions:

- *Admin access to MDF OData API*
- *Access to Integration Center*
- *Access to non-Secured Objects*

Procedure

1. Go to ► [Admin Center](#) ► [Integration Center](#) ► [My Integrations](#) ►.
2. Click [Create](#) and then select [More Integration Types](#).
3. Select [Application/UI](#), for *Trigger Type*.
4. Select [SuccessFactors](#), for *Source Type*.
5. Select [REST](#), for *Destination Type*.
6. Select [JSON](#), for *Format*.
7. Click [Create](#).
8. Type **JobApplicationBackgroundCheckRequest** in the *Search for Entities by Entity Name* search box and select the entity from the results.
9. Click [Select](#).

Next Steps

Once you've created the template, define the template options.

Related Information

[List of Role-Based Permissions](#)

4.3 Configuring the Integration Center Templates for External Background Checks

After you've created the Integration Center template for external background checks, configure the elements and fields on the template.

Prerequisites

You've created an Integration Center template based on the [JobApplicationBackgroundCheckRequest](#) entity.

❗ Note

You can download a sample template from the SAP API Business Hub to use as a starting point for the background check integration template.

Context

The fields defined on the integration template determine the outbound payload structure of the integration. To understand the full range of options available, review the OData API guides.

For a full list of available entities and their properties, go to ► [Admin Center](#) ► [OData API Data Dictionary](#) ►.

To understand the data structures of SAP SuccessFactors Recruiting, go to ► [Admin Center](#) ► [Integration Center](#) ► [Data Model Navigator](#) ►.

Procedure

1. In the [Integration Center](#) under [Create New Application / UI JSON REST Output Integration](#), go to the [Options](#) tab.
2. Specify the [Integration Name](#) and choose [Next](#).
3. Click the plus icon and select [Insert Sibling Element](#) to add elements to the template.
4. Enter a name for the element in the [Label](#) text box.

Each sibling element corresponds to a section of the template. For example, you can add sibling elements called **BackgroundCheckInfo** and **ApplicantInfo**.

5. Select the sibling element you created, then click the plus sign icon and choose [Add Child Element](#).
6. Enter the name of the field in the [Label](#) text box.

After you've created your data structure, assign the created properties with their corresponding OData API properties.

7. Now, you need to assign the created properties with their corresponding OData API properties. To do this, select the relevant field and choose [Set as Associated Field](#).
8. Find and select the OData API property you want to assign the field to, and click [Change Association to <Entity Name>](#).
 - Search for the property by name using the [Enter for Field Name](#) search box. This method is only recommended, if you know the exact name of the property you want to assign.
 - Use the [Entity Tree View](#) to find related entities that can be reached through the OData API navigation properties.

When most of the fields are assigned, you can see a preview of the integration payload in the [Preview](#) section.

9. Click [Next](#) when you're finished associating the fields.
10. Click the [Switch to Field Mapping View](#) option on the [Response Fields](#) tab.
11. Click the plus icon and select the [JobApplicationBackgroundCheckRequest](#) entity.
12. Click [Add](#), and then [Next](#).
13. You don't have to set anything on the [Filter and Sort](#) tab. Click [Next](#).
14. Define the destination settings for the REST API call on the [Destination Settings](#) tab, and choose [Next](#).

You can find additional information for defining the destination settings on the Integration Center guide.

15. Review the template structure on the [Review and Run](#) tab. To save it, choose [Save](#).

Once created, the template runs in the background, so there's no need to select [Run Now](#).

4.4 Maintaining Vendor Integration Information for External Background Checks

Associate your configured external background check vendor with the correct Integration Center template.

Prerequisites

- You've configured the vendor information.
- You've defined the Integration Center template.

Procedure

1. Go to ► [Admin Center](#) ► [Manage Data](#) ►.
2. Select [Recruiting Vendor Integration Mapping](#) from the [Create New](#) dropdown menu.
3. Enter a custom, unique value for the integration in the [External Code](#) field.
4. Select your background check vendor from the [Vendor Name](#) dropdown.
5. Select the relevant Integration Center template from the [Integration Center Integration Name](#) dropdown.
6. Select [Yes](#) in the [Default Integration](#) dropdown.

Only one Recruiting Vendor Integration Mapping can be active at any time. To designate the selected vendor integration as active for the instance, select [Yes](#) in this field.

7. Enter any numeric value in the [Hours Before User Can Reinitiate](#) field.

ⓘ Note

This field has no functionality.

8. Click [Save](#).

Results

Recruiting users with the proper permissions can trigger the background check for an applicant.

4.5 Granting Permissions to Initiate Background Checks

Give permission to the necessary users and status sets so that Recruiting users can initiate background checks.

Prerequisites

You have access to Provisioning.

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Context

You can only initiate a background check from the applicant statuses with the proper permissions. Only users who have the proper permissions can initiate background checks.

Procedure

1. Go to ► [Provisioning](#) ► [Managing Recruiting](#) ► [Import/Update/Export Job Requisition Template](#) ►.
2. Add the feature permission block for background check to the job requisition template.

Sample Code

```
<feature-permission type="backgroundCheck">
  <description><!\[CDATA[R can launch Background Check during statuses with
screening category.]\]></description>
  <role-name><!\[CDATA[T]\]></role-name>
  <role-name><!\[CDATA[O]\]></role-name>
  <role-name><!\[CDATA[R]\]></role-name>
  <role-name><!\[CDATA[S]\]></role-name>
  <status><!\[CDATA[Background Check]\]></status>
</feature-permission>
```

Note

These permissions set in the job requisition template are not applicable to the two associated OData APIs - `JobApplicationBackgroundCheckRequest` and `JobApplicationBackgroundCheckResult`, which you can use to fetch the background check status of the job applications.

3. Assign [Background Check Initiate Permission](#) and [Allow users to execute "Application/UI" or "Event-based" Integrations](#) role-based permissions from [Admin Center](#).

Next Steps

You can now initiate a background check with an external background check vendor.

Related Information

[List of Role-Based Permissions](#)

4.6 Initiating a Background Check with an External Background Check Vendor

Carry out a background check on a potential job candidate with a third-party (external) background check vendor.

Prerequisites

You've enabled background checks with external vendors, and assigned the Recruiting users all the necessary permissions.

Procedure

1. Go to  [Admin Center](#)  [Recruiting](#) .
2. On the [Job Requisitions](#) page, hover over the desired requisition title to open the [Actions](#) menu and then select [View or Edit Requisition](#).
3. Confirm or select the correct values for the [Account ID](#) and [Package ID](#) fields.
4. Click [Save Changes](#).
5. On the Talent Pipeline, click the name of any candidate in the [Background Check](#) status.
6. Click [Take Action](#).
7. Select [Initiate Background Check](#).
8. Click [Confirm](#).

Results

This initiates the background check. You can keep track of the status and results on the [Background Check](#) portlet on the candidate's profile.

5 Integrating Recruiting with Third-Party Vendors for Candidate Assessment

Integrate SAP SuccessFactors Recruiting with third-party assessment vendors so that you can use them to perform candidate assessment.

Prerequisites

- You must have appropriate licensing to use the Assessment Integration.
- For standard SHL, PeopleAnswers, and CEB or TalentCentral integration:
 - Your Boomi account must be provisioned to access Integration Packs and the Atom Cloud where they're deployed. Provisioning of the account is directly tied to the SKU used to purchase the integration.
 - Your account must have an environment created and attached to the Boomi Cloud.
 - The Recruiting Management system must be configured for Assessment Integration before configuring the third-party integration using middleware.
 - SAP SuccessFactors Recruiting Management and PeopleAnswers/SHL Using Boomi
 - Recruiting Management and PeopleAnswers/SHL
- For vendor integration:
 - Engage with vendor for proper contract.
 - Choose the middleware.
- Ensure that you have Provisioning access.

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

- Ensure that you grant [Manage Assessment Vendors](#) permission to recruiting users.

Context

Configuring Assessment Integration requires engagement from an Implementation Partner for configuring XML and enabling additional settings. The steps that require an Implementation Partner are identified.

Procedure

1. Enable the following options in ► [Provisioning](#) ► [Company Settings](#) ►:

- [Enable Assessment Integration](#)
- [SFAPI](#)
- [Enable SFAPI Webservices](#)

2. Add assessment vendors.

- Users with Manage Assessment Vendors permissions can add assessment vendors. Go to ► [Admin Center](#) ► [Manage Assessment Vendors](#) ► and upload the Assessment Vendors CSV file.
- Recruiting users with admin permissions can add, change, and remove custom assessment vendors in the Admin Center. Vendor can build an assessment integration, and then select the vendor for the assessment package when creating a job requisition. You can build out the middleware template to consume the data from Recruiting Management and send it to a new vendor (refer to the middleware guide for more detailed instructions). The following alert must be used: `rcm_assessment_alert_v2`.

3. For the first vendor import, export the CSV file to generate a sample file that contains the required columns.

The following fields are mandatory:

- **externalPartnerCode** ([External Partner Codes for Supported Third-Party Assessment Vendors \[page 35\]](#))
- **clientId** (Comes from the assessment vendor and corresponds to client being implemented. Ensure that the clientId is unique in the file. Otherwise, there can be configuration issues.)
- **active** (Y/N)

→ Tip

Complete the import/export of assessment vendors before the Import/Export Assessment Vendor Packages, else an error occurs.

4. Upload the assessment vendor packages in ► [Provisioning](#) ► [Managing Recruiting](#) ► [Import/Export Assessment Vendor Packages](#) ►. The third-party vendors provide the assessment vendor packages.

For the first vendor package import, export the CSV file to generate a sample file that contains the required columns. The following fields are mandatory:

- **vendorId**: Identifies the assessment vendor the package uses. The only supported values are listed in the approved vendor list.

ⓘ Note

`vendorId` has to be the same as `clientId`

- **packageCode**: identifies an assessment solution to use for the order. Generated by the third-party assessment vendors.
- **shortName**: Shortened name of the package for use on the candidate summary page. The complete name appears elsewhere.
- **Label for each locale**: The combination of the country and location code for each language in which the assessment is displayed. For example: `en_US`, `fr_FR`.

The following columns are included in the template, but aren't used. You can leave these empty:

- `ReportPackageCode`

- `ComparisongroupID`
5. Create an SFAPI integration user.
 6. Grant Access to [Event Notification Subscription](#) permission to the SFAPI integration user.
 7. Grant the SFAPI [Retrieve Assessment Order](#) permission to the SFAPI integration user.
 8. Grant the [SFAPI Update Assessment Report](#) permission to the SFAPI integration user.

Note

Provide unique field names and fieldkey values for all SFAPI operations.

9. Grant [API User Login](#) permissions for the SFAPI integration user.
10. Set the API logon exceptions. Go to ► [Admin Tools](#) ► [Password & Login Policy Settings](#) ► [Set API Login Exceptions](#) ► [Add](#) . Then set the following:
 - [Username](#): Select the SFAPI integration user.
 - [Maximum password age \(days\)](#): Set this option to -1.
 - [IP Address Restrictions](#): Designated IP addresses or address range for use with integration.
11. Add an Event Notification Subscriber. Go to ► [Admin Center](#) ► [Event Notification Subscription](#) . Click the [Subscriber](#) tab, and click [Edit Subscriber](#) to add or edit a subscriber.
12. For each new subscriber entry, complete the following information:
 - [Category](#): Default to **Customized**
 - [Subscriber ID](#): Vendor name list
 - [Name](#): Any text
 - [Group](#): Any text
 - [Status](#): Active or Inactive
 - [Client Id](#): This has to match the externalPartnerCode from the approved vendor list.

Note

[Client Id](#) has to be the same as [Vendor Id](#).

13. Add the Boomi, HCI, or other middleware process subscriber.
 - For PeopleAnswers and SHL (Boomi and HCI) and for CEB/TalentCentral (Boomi), go to ► [Admin Center](#) ► [Event Notification Subscription](#) , click the [External Event](#) tab, and then click [Add](#) to configure a new subscription.
To add the process as a subscriber, enter the following information:
 - [Alert Type](#): rcm_assessment_alert
 - [Subscriber ID](#): In the dropdown, select the subscriber you have already created.
 - [Protocol](#): SOAP_OVER_HTTP_HTTPS
 - [Endpoint URL](#): Boomi, HCI, or other middleware Web Service URL. To create the Web Service URL, append /ws/soap?wsdl to the URL in the Shared Web server settings in the middleware account.

Note

If the middleware Web Service requires authentication, enter the username and password.

- For custom vendors, go to ► [Admin Center](#) ► [Event Notification Subscription](#) , click the [External Event](#) tab, and then click [Add](#) to configure a new subscription.

To add the process as a subscriber, enter the following information:

- **Alert Type:** rcm_assessment_alert_V2
- **Subscriber ID:** In the dropdown, select the subscriber you have already created.
- **Protocol:** SOAP_OVER_HTTP_HTTPS
- **Endpoint URL:** Boomi, HCI, or other middleware Web Service URL.

14. → Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Add and permission the assessment field on the Job Requisition XML.

Job Requisition assessment field XML sample

Sample Code

```
<field-definition id="assessment" type="derived" required="true"
custom="false">
  <field-label><![CDATA[Assessment association]]></field-label>
  <field-description><![CDATA\[Assessmentasso]]></field-description>
</field-definition>
<field-permission type="write">
  <description><![CDATA[job code permissions]]></description>
  <role-name><![CDATA[R]]></role-name>
  <status><![CDATA[pre-approved]]></status>
  <field refid="assessment"/>
</field-permission>
```

15. → Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Add the Assessment Integration feature permission and feature permission block to the Job Requisition XML.

The Assessment Integration feature permission is used to permission the Assessment Portlet in the applicant profile.

Job Requisition Assessment Integration Feature Permission XML Sample

Sample Code

```
<feature-permission type="assessmentIntegration">
  <description><![CDATA\[Operators with below roles can see
Assessment detail report for the applicant when the application is in Phone
Screen Status\]]></description>
  <role-name><![CDATA\[S\]]></role-name>
  <role-name><![CDATA\[T\]]></role-name>
  <role-name><![CDATA\[O\]]></role-name>
  <role-name><![CDATA\[R\]]></role-name>
  <role-name><![CDATA\[G\]]></role-name>
  <status><![CDATA\[Phone Screen\]]></status>
</feature-permission>
<feature-permission type="assessmentIntegration">
```

```

        <description><!\[CDATA\[Operators with below roles can see
        Assessment detail report for the applicant when the application is in New
        Application Status \]\]></description>
        <role-name><!\[CDATA\[S\]\]></role-name>
        <role-name><!\[CDATA\[T\]\]></role-name>
        <role-name><!\[CDATA\[O\]\]></role-name>
        <role-name><!\[CDATA\[R\]\]></role-name>
        <role-name><!\[CDATA\[G\]\]></role-name>
        <status><!\[CDATA\[Default\]\]></status>
    </feature-permission>

```

Related Information

[SuccessFactors Recruiting Management and PeopleAnswers/SHL Using Boomi](#)

[Recruiting Management and PeopleAnswers/SHL](#)

[SuccessFactors RCM with Third Party Assessment Vendor-Generic Template](#)

5.1 Adding Assessment Vendors

Make assessment vendors available in Recruiting.

Prerequisites

You've enabled *Enable Assessment Integration (requires Candidate Workbench)* in your company instance.

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Context

As an admin user, you can add, change, and remove custom assessment vendors in the Admin Center. This helps the vendor to build out an assessment integration, and you can then select the vendor for the assessment package when creating a job requisition.

Procedure

1. Go to ► [Admin Center](#) ► [Manage Assessment Vendors](#) ►.
2. To add a new vendor, select [Import](#) on the [Import/Export Assessment Vendors](#) page.

Note

Only CSV file type is supported.

For the first vendor import, export the CSV file to generate a sample file that contains the required columns.

The following fields are mandatory:

- **externalPartnerCode**
- **clientId** (comes from the assessment vendor and corresponds to the client being implemented.)

Note

Ensure that the clientId is unique in the file, else there can be configuration issues.

- **active** (Y/N)

3. Choose [Submit](#).

5.2 External Partner Codes for Supported Third-Party Assessment Vendors

A list of supported values for externalPartnerCode.

- ADP
- AON
- ASCEND
- ASPIRING_MINDS
- ASSESS
- ASSESSMENT_SYSTEMS
- AXIOM
- BERKE
- BIDDLE
- BRILLIANTHIRE
- CAMMIO
- CAPP_ASSESSMENT
- CAPP_CO
- CARE_ADVANTAGE
- CARTEL_SYSTEMS
- CERTIPHI
- CHECKSTER

- CHEMISTRY
- CHEQUED
- CRITERIA
- CUBIKS
- CUT-E
- CYQUEST
- DDI
- DRIVERCHECK
- EASYRECRUE
- EELLOO
- ELIGO
- EQUIFAX
- ESKILL
- EVOLVE
- EY
- FACET5
- FIRST_ADVANTAGE
- GARTNER
- GIS
- HACKERRANK
- HIRE_TALENT
- HIREDSCORE
- HIREVUE
- HOGAN
- HOLLAROO
- HR_AVATAR
- HR_DIAGNOSTICS
- HRNX
- IBM
- IIC
- INTELEFI
- INTERVIEWED
- INTERVIEWMOCHA
- IONA
- JOMBAY
- KENEXA
- KORNFERRY
- LAUNCHPAD
- LOGI_SERVE
- LUGO
- MAUS
- MAXIMUS

- MEA
- MEYERS_BRIGGS
- MONTAGE
- MROADS
- ONTARGET
- PAN
- PEOPLEG2
- PEOPLEMATTER
- PEOPLEISE
- PA
- POMELLO
- PREDICTIVE_INDEX
- PREVUE
- PREVUEHR
- PROFILES_INTERNATIONAL
- PSI
- PYMETRICS
- QFIT
- RECRIGHT
- RECRUITMENTSMART
- REPNUF
- REVELIAN
- RIVS
- SAVILLE_CONSULTING
- SCREENOM
- SELECT_INTERNATIONAL
- SEMAC
- SHL
- SKILLATE
- SKILLSURVEY
- SMARTERER
- SPEEXX
- STANG
- STANG_DECISION_SYSTEMS
- STARTEXAM
- TAG
- TALENT_CENTRAL
- TALENTADORE
- TALENTCUBE
- TALENTMATCH
- TAXCREDITCO
- TESTGRID

- TESTUP
- THINK_TALENT
- THOMAS_INTERNATIONAL
- TRAITIFY
- TRAITS
- VIAPEOPLE
- VIDEOBIO
- VIEPLE
- WALTON
- WONDERLIC
- WORLD-CHECKONE
- WSI
- YOBS
- ZEROLIME

5.3 Hard Stop Status for Job Requisitions Without an Assessment

A **hard stop** status in the Job Requisition template ensures that an applicant in the application pipeline can't proceed until the results for the assessment order are returned on the applicant record.

- A hard stop status field is configured in the job requisition template as a standard field.
- On the [Job Requisition Detail](#) page, the hard stop status dropdown consists of a list of **active**, **default**, **in progress**, and **onboarded** statuses available in the application status set associated with the job requisition.
- When the recruiter moves the applicant to a status past the hard stop status, the system checks if assessment triggers exist for the applicant and if all of them are completed. If yes on both counts, the new status is allowed. If not, the candidate won't be allowed past the status until all assessments are complete.

You can configure and assign permissions to the assessment hard stop field in the job requisition template, just like you can for other job requisition fields. This field is configured as a standard picklist field.

Sample Code

```
<field-definition id="hardstopStatus" type="picklist" required="false"
custom="false">
  <field-label><![CDATA[Hardstop Status]]></field-label>
  <field-description><![CDATA[Hardstop status for assessments]]></field-
description>
  <picklist-id>jobReqStatus</picklist-id>
</field-definition>
```

Caution

Although this standard field is configured as a picklist, and picklist ID is provided, the field behaves as a derived field. This field displays the **default**, **on boarded**, and **in progress** statuses of the job requisition, according to the application status set ID associated with the job requisition.

→ Remember

The system doesn't check the selection of the hard stop status against the status configured for the assessment. Don't configure a hard stop status that would exist in the workflow **before** the status associated with the assessment. This would prevent the candidate from moving through the system without being sent an assessment.

5.4 Assessment Integration

You can integrate with third-party vendors to perform candidate assessments.

📘 Note

This is an SAP SuccessFactors Business Beyond Bias feature. Use it to support processes that detect, prevent, or eliminate the influence of bias, helping you achieve your diversity and inclusion goals.

Using this integration, you can perform the following:

- Assign assessments to job requisitions.
- Prompt applicants to fill out the corresponding assessment.
- View assessment statuses and results in the assessment portlet within the application.

This integration requires a separate third-party contract with PeopleAnswers, SHL, or other supported vendor. If you opt in to the assessment integration and configure it, Recruiting users can see a section on the requisition that allows them to assign an assessment package to the requisition.

→ Remember

You can't configure multiple assessment packages for the same Applicant Status.

In SAP SuccessFactors Recruiting Management, the following three standard integrations are supported:

- PeopleAnswers
- SHL
- Gartner CEB/TalentCentral

PeopleAnswers requires either Boomi or SAP HCI, whereas Gartner CEB/TalentCentral is supported only for Boomi.

The middleware integration for other vendors is a custom solution that must be built by Professional Services Integrations or Partner Integrations.

📘 Note

- The CEB/TalentCentral integration follows the pattern of the SHL integration for the setup.
- Currently, the CEB/TalentCentral isn't officially supported for use with SAP HCI. However, the integration works.
- Submission of a new application triggers assessment integration, provided assessment integration is configured to the new/default application status.

- Changing the status of an application also triggers assessment integration, provided assessment integration is configured to the status in which you move the application.

Related Information

[SuccessFactors Recruiting Management and PeopleAnswers/SHL Using Boomi JobApplication](#)
[JobApplicationAssessmentOrder](#)
[JobApplicationAssessmentReport](#)

5.5 Working with Assessment Integration

Assessments can be configured for any in-progress status in the applicant pipeline.

When an assessment is configured in New Applicant, the assessment is triggered when the candidate applies for the job. Immediately after applying and passing the prescreening questions, the candidate will be redirected to an assessment vendor site. After completing the assessment, the candidate will be redirected back to the career site. Auto-disqualified applicants who fail the prescreening questions aren't prompted to take an assessment.

If you configure the assessment in any status other than New Applicant, the assessment gets triggered when a recruiter or other operator moves the application to a status where assessment is configured. Once the recruiter triggers the assessment, the candidate receives an email with a link to take the assessment.

Note

The tokens `[[APPLICATION_ASSESSMENT_PROVIDER_URL]]` and `[[APPLICATION_ASSESSMENT_PACKAGE_TITLE]]` can be used to provide information about the assessment.

This process is single-sign-on and doesn't require additional logon credentials when using PeopleAnswers or SHL. For users with custom vendors, however, whether SSO is enabled depends on how the custom integration to that vendor is built. After candidates complete their assessment on the assessment vendor site, they're redirected to the standard *Thank you for applying* page within the Recruiting Management career site.

The recruiting user can access the assessment results on the candidate summary list page. In the legacy Candidate Workbench, users can also sort results on the *Candidate Summary* page by score, recommendation, and status. However, in the redesigned Applicant Management tool recruiters can sort applicants on the list page by assessment status only. Sorting applicants by assessment recommendations and status is not yet supported.

The assessment portlet displays assessment results on the applicant profile page. The assessment portlet displays differently for different assessment vendors.

Note

You can't configure the same assessment package for different application statuses. Also, you shouldn't edit the assessment package after the job requisition is approved. When associating a new assessment with a job requisition, make sure you fill out all the required assessment fields, or you may have trouble saving the requisition information. Don't save a job requisition.

Available PeopleAnswers Results Fields

Recruiting Field Name	Recruiting Field Value	Translated	PeopleAnswers Field Name	Visible On
Recommendation	- Recommended - Recommended with Qualifications - Recommended with Reservations - Not Recommended	Yes - value is translated	Recommendation	- Legacy Candidate Summary page - Individual Application page
Score	Numeric value	Yes - field name is translated	Score	- Legacy Candidate Summary page - Individual Application page

Available SHL Results Fields

Recruiting Field Name	Recruiting Field Value	Translated	SHL Field Name	Visible On
Recommendation	- Recommended - Not Recommended	Yes, value is translated.	Passed	- Legacy Candidate Summary page - Individual Application page
Percentile	Numeric value expressed as a percentage (%).	No	Scale	Individual Application page
Band	- High - Medium - Low	No	Band	Individual Application page
Score	Numeric Value	Yes - field name is translated	Score	- Legacy Candidate Summary page - Individual Application page

Available Custom Vendor Results

Recruiting Field Name	Visible On
Recommendation	- Legacy Candidate Summary page - Individual Application page
Score	- Legacy Candidate Summary page - Individual Application page
Subscriber ID	Assessment Integration Results portlet

Recruiting Field Name	Visible On
Client ID	Assessment Integration Results portlet

5.6 Assessment Integration Known Behaviors

There are several known behavior issues regarding Assessment Integration.

- **Hard stop status:** A user editing the requisition can trigger an assessment after the status configured for the hard stop. This prevents all applicants from taking the assessment and moving forward in the process. Users should pay close attention to the configuration of the assessment on the requisition to prevent this.
- **Uploading and managing the vendor assessments:** A user can upload the vendor assessment to RCM. Change the display name of previously loaded assessments by uploading a new list with the new display names. You can't remove uploaded assessments, or remove them from the picklist on the requisition.
- **Editing the job requisition:** You can edit the assessment after the job requisition is posted but this configuration isn't recommended. If a recruiting user edits the assessment field after candidates have applied to the job (for example, requiring a more rigorous skills screening than was previously asked for), two sets of candidates with different assessment criteria will be created. Permissions for the assessment field are the same as any other field-level permission.
- **Adding assessments to a requisition:** The assessment field on the requisition has a link that allows the user to add multiple assessments to the requisition. However, PeopleAnswers and SHL only support one assessment per requisition. Don't select more than one assessment per requisition. We recommend adding a text field to the requisition template below the assessment field instructing the user to only add one assessment per requisition. Optional text: "Please Note: The assessment integration only supports one assessment selection per requisition."
- **Candidate forwarding:** If a recruiting user moves a candidate from one requisition to another requisition and into a status after the assessment trigger status, the system won't send an assessment request to that candidate. Recruiting users should move the candidate to a status before the assessment trigger status in the new requisition.
- **Adding assessment score to applicant summary view in the legacy Candidate Workbench:** Data for PeopleAnswers and SHL is stored in different fields, and the two vendors don't share a common score field that can be permanently added to the applicant summary page. To view the score for all applicants, you must add the individual vendor score field to the applicant summary view for each requisition.

Note

Assessment score cannot be added as a filter nor display option in the redesigned Applicant Management list page.

- We don't need to initiate assessment for late stage applications.
- The Boomi standard integration for Assessment Integration requires that all the fields used in the integration pack are available in your data model. If you get a failure message in Boomi with the pattern *Exception=[SFAPI Domain Error!] Error Code=[INVALID_FIELD_NAME] Error Message=[Field <field name> isn't defined]*, please check your data model for missing fields. For example, the gender field is used in the integration pack. A client must have this field in the data model, but it doesn't have to be permitted for any user, so it never displays.
- **Timezone:** Send the date information in the GMT timezone (converted to GMT), as SFAPI doesn't process any other timezone.

5.7 Assessment Integration Frequently Asked Questions

Answers to commonly asked Assessment Integration questions.

What is the difference between the Event Type `rcm_assessment_alert` and `rcm_assessment_alert_v2`?

Functionally, they're the same. The v2 alert has a common tag and not a specific Boomi tag.

How many assessments can be selected on a requisition?

Select only one assessment per requisition. The system allows you to insert more than one assessment for a requisition, but this doesn't complete the triggers.

Does the job seeker have to log on to complete the assessment?

To complete the assessment, the job seeker must complete their profile. When the job seeker is routed to the assessment vendor from Recruiting, an account is automatically created with the relevant fields prepopulated. For integrations with PeopleAnswers, the job seeker must create a secure login.

How long does it take for the assessment information to be sent from the assessment vendor to Recruiting?

The information is sent in close to real time, but information can take a few minutes to process, send, and store in Recruiting.

Do PeopleAnswers or SHL send back a detailed report explaining the results for the job seeker?

No. The recruiter sees a high level overview and overall score in Recruiting. Recruiters can also see detailed results by clicking a link for more information.

Do job seekers receive email with a link if they choose to take the assessment at a later time?

Yes. When the assessment trigger is configured for the initial application, job seekers click the [Apply](#) button and are redirected to the assessment vendor site. Job seekers receive an email with a link to the assessment. Job seekers can also visit the [Jobs Applied](#) page and use the [Action](#) menu to complete the assessment. If the assessment trigger is configured for any status other than the completed application, the system sends applicants an email inviting them to complete the assessment. They can also visit the [Jobs Applied](#) page and use the [Action](#) menu to complete the assessment.

Is there a time constraint when the assessment needs to be completed?

No. There's no technical time constraint.

Is there a way to require job seekers to complete the assessment before they can move through the process?

Yes, by configuring a hard stop status. The hard stop status is configured, the recruiter editing the requisition's assessment information can select which status is the hard stop. Job seekers can't move past this status without completing the assessment.

Are all assessment results translated?

The Recruiting product supports the translation of a set of standard values for assessment-related fields. Other custom statuses outside this standard set aren't supported for translation. Following are the accepted values for Assessment Status, Score, and Recommendation.

- **Assessment Status**
 - Initiated
 - Error ordering assessment
 - Completed
 - Pending
- **Score** This is a number field and the value is numeric.
- **Recommendation** – The field is localized, and the localized values are displayed on the applicant profile page.
 - Recommended
 - Recommended with qualifications (PeopleAnswers only)
 - Recommended with reservations (PeopleAnswers only)
 - Not Recommended

The candidate says that the assessment is complete, but I don't see the results in Recruiting.

Temporary outages or system maintenance can cause a delay results posting. The vendor attempted to repost the delayed results at regular intervals. For PeopleAnswers, when a results post fails for any reason, PeopleAnswers attempts to resend the results, every 10 minutes for first hour, then every hour for the first day, and once daily for up to five days, until it succeeds. If after five days the results aren't posted, contact SAP SuccessFactors for assistance. SHL attempt to resend the results a total of five times, with an extended period between each attempt. For custom vendors, consult the vendor.

Is assessment email templates overridden at the job requisition level?

The same requisition status may be associated with different assessments for various job requisitions. Thus, the email template may differ depending on the assessment package, as the email can include instructions to perform the assessment or specific guidelines for that assessment.

Is link to the assessment report provided?

Assessment reports are provided access controlled and provided on request. The reports cannot be viewed by everyone.

What happens if an applicant is being asked to take an assessment they have previously completed for a similar position?

If a candidate applies for a job and takes an assessment for a company, then reapplies for another job that requires the same assessment, they do not have to complete the assessment again. When the candidate clicks the assessment link, they see a message informing them the assessment is complete. The client should work with the appropriate vendor to define the timeframe for valid assessments.

Can the Candidate Summary page be configured by default to display the Assessment Integration column?

You can't display the assessment integration columns in the candidate summary by default. Unlike other display options, these are not configured in the CDM, but are available by default when an Assessment Integration is configured. The users have to open their display options and enable the columns to be shown.

Note

In the redesigned Applicant Management tool, only assessment status is available by default as filter and display option when an Assessment Integration is configured. Assessment score and assessment recommendation are not supported.

When the candidate is forwarded from one requisition to another, is the assessment information included with the candidates information?

No. Because of the uniqueness of assessments related to the requisition the system does not move that data with the candidate. A forwarded candidate will follow the regular workflow for the new requisition and the assessment will be triggered when the candidate is in the configured assessment status.

What happens if a requisition is closed and there are applicants who have not completed an assessment that has been triggered for them?

The applicant can take the assessment after the requisition is closed. Results from the assessment are sent to the applicants record in Recruiting.

What is required to setup the assessment integration?

Configuring Recruiting and assessment integration requires changes in Provisioning and Admin Tools, and updating files for Boomi/HCI or custom middleware. Clients should coordinate setup with the assessment vendor.

Do we need to use the Boomi/HCI Professional Services Team for this integration?

Yes, this is part of the setup process with Professional Services.

The SHL and PeopleAnswers Integration workflow is great but my customer uses <insert assessment vendor name here>. Can we configure Boomi or Recruiting to work the same way with this vendor?

Yes, the standard fields on the Requisition and Application portlets can be utilized with a vendor from the approved vendors list. The middleware piece is completely custom and must be built out. The client can work with Professional Services to create a custom integration with another vendor.

The client has an integration with SAP that create the requisition in Recruiting. Can this integration populate the assessment field(s) on the requisition?

No, you can't populate the assessment fields on the requisition with an API.

How can I describe this integration in 150 words or less?

The assessment integration allows a Recruiting user to set up an assessment order tied to a selected status of the requisition which automatically triggers the applicant to complete their assessment. The assessment results are tracked on the applicant's record and added to the record upon completion of the assessment. The assessment results appear as display options on the applicant list page supporting cross-applicant comparisons.

Does SAP SuccessFactors manage the assessment pricing and contract with PeopleAnswers or SHL for the Client?

No. The client is responsible for managing their relationship with PeopleAnswers and/or SHL.

I understand this integration with SHL or PeopleAnswers uses Boomi or HCI. Does the client need to know we are using Boomi or HCI, and is there another charge?

The use of Boomi or HCL is considered part of the technology stack that's used to manage the PeopleAnswers and SHL integration. The assessment integration for SHL and PeopleAnswers is considered an iFlow. The SKU 'Boomi Integration for Recruiting' includes the use of the SHL and PeopleAnswers iFlow. This is managed by Finance and you should reference the information in BMI for final confirmation.

Does PeopleAnswers or SHL charge for configuring the integration?

The client should check with their PeopleAnswers or SHL representative to discuss costs associated with that vendor.

6 RCM to SHL Assessment Order Request Field Mapping

RCM Entity	RCM Field	Translation	Interim Map	SHL Field
AssessmentOrder	assessmentPackage-Code			AssessmentOrderRequest/PackageId/IdValue
	"1"			AssessmentOrderRequest/SolutionId/SittingNumber/IdValue
	candidateTemplateId			
	candidateId			AssessmentOrderRequest/AssessmentSubject/SubjectId/ApplicantId/IdValue
	id			AssessmentOrderRequest/ClientOrderId/IdValue
	jobReqTemplateId			
	jobReqId			- AssessmentOrderRequest/ComparisonGroupId/RequisitionNumber/IdValue - AssessmentOrderRequest/ClientOrderId/OrderNumber/IdValue
	handbackURL			- UserArea/.../Pass-Completion-Step/.../ForwardURL - UserArea/.../Fail-Completion-Step/.../ForwardURL

RCM Entity	RCM Field	Translation	Interim Map	SHL Field
	clientId	Same as SHL_clientId		AssessmentOrderRequest/ClientId/IdValue
JobApplication	applicationLocale	This field is ignored. The applicant/admin is shown EN by default.		- AssessmentOrderRequest/AssessmentSubjectType/AssessmentLanguage - AssessmentOrderRequest/AssessmentSubjectType/ResultLanguage
	firstName			AssessmentOrderRequest/AssessmentSubjectType/GivenName
	middleName			AssessmentOrderRequest/AssessmentSubjectType/MiddleName
	lastName			- AssessmentOrderRequest/AssessmentSubjectType/FamilyName - AssessmentOrderRequest/AssessmentSubjectType/LegalName
	contactEmail			AssessmentOrderRequest/AssessmentSubjectType/ContactMethod/InternetEmailAddress
	gender	Must conform to ISO 5218 - Representation of Human Sexes (0 - Not Known; 1 - Male; 2 - Female; 9 - Not specified)		AssessmentOrderRequest/AssessmentSubjectType/AssessmentPersonDescriptors/BiologicalDescriptors/GenderCode

RCM Entity	RCM Field	Translation	Interim Map	SHL Field
	homePhone			AssessmentOrderRequest/AssessmentSubjectType/ContactMethod/Telephone
	cellPhone			AssessmentOrderRequest/AssessmentSubjectType/ContactMethod/Mobile
	country	Not validated, Not used by SHL, can be ignored		AssessmentOrderRequest/AssessmentSubjectType/ContactMethod/ Address(type=blank)/CountryCode
	state	Not validated, Not used by SHL, can be ignored		AssessmentOrderRequest/AssessmentSubjectType/ContactMethod/Address(type=blank)/Region
	city	Not validated, Not used by SHL, can be ignored		
	address			'AssessmentOrderRequest/AssessmentSubjectType/ContactMethod/Address(type=blank)/AddressLine
	zip			AssessmentOrderRequest/AssessmentSubjectType/ContactMethod/ Address(type=blank)/Postalcode
JobRequisition	hiringManager		assessmentRequestor	AssessmentOrderRequest/AssessmentOrderRequest/AssessmentRequester

RCM Entity	RCM Field	Translation	Interim Map	SHL Field
User (query for jobRequisition/assessmentRequestor)	email		JobRequisition/assessmentRequester	AssessmentOrderRequest/AssessmentSubjectType/ContactMethod/InternetEmailAddress

6.1 SHL to RCM Assessment Order Acknowledgement Field Mapping

RCM Entity	RCM Field	Translation	SHL Entity/Field	Possible Value
rcmAssessmentResponse			AssessmentOrderAcknowledgement/ClientId/IdValue	
			AssessmentOrderAcknowledgement/ProviderId/IdValue	SHL
	entityId		AssessmentOrderAcknowledgement/ClientOrderId/IdValue	
	assessmentURL		AssessmentOrderAcknowledgement/AccessPoint/InternetWebAddress	
	status	"Acknowledge" = 99 "Error" = 2	AssessmentOrderAcknowledgement/AssessmentStatus/Status	"Error" "Acknowledged"
	statusDetails			AssessmentOrderAcknowledgement/AssessmentStatus/Details
	statusDate		AssessmentOrderAcknowledgement/AssessmentStatus/StatusDate	
	receiptId			

RCM Entity	RCM Field	Translation	SHL Entity/Field	Possible Value
	errorCode	"AI_SYS_01" - This error code is used while Alert API connects to Boomi or while Boomi could not connect to vendor "AI_SYS_02" - This error code is used when there is an issue in the assessment vendor side "AI_CNF_01" - This error code is for the issue when there is an issue in the configuration of package / vendor / association "AI_BIZ_01" - This error code is when candidate has already taken the assessment.	AssessmentOrderAcknowledgement/AssessmentStatus/Details	Description of Error/Success message acknowledgement

6.2 SHL to RCM Assessment Result Field Mapping

RCM Entity	RCM Field	Translation SHL	SHL	Default Value	Example
AssessmentReport			AssessmentResult/ClientId		Client214
			AssessmentResult/ProviderId		PreVisor
	orderId		AssessmentResult/ClientOrderId		ORD121232
			AssessmentResult/ReceiptId		

RCM Entity	RCM Field	Translation SHL	SHL	Default Value	Example
			AssessmentRe- sult/Results/Pro- file		Profile Name
	field1Key			RECOMMENDA- TION	
	field1Value	• true = 1 • false = 4 • 2 (Recom- mended with Qualifications) • 3 (Recom- mended with Reservations) • Other values are not sup- ported by SHL?	AssessmentRe- sult/Results/Over- allResult/Passed	"true" or "?"	true
			AssessmentRe- sult/Results/Over- allResult/Descrip- tion		
	field2Key			Percentile	
	field2Value		AssessmentRe- sult/Results/Over- allResult/Scale		93.0
	field3Key			Band	
	field3Value		AssessmentRe- sult/Results/Over- allResult/Band		High
	field4Key			Score	
	field4Value		AssessmentRe- sult/Results/Over- allResult/Score		

RCM Entity	RCM Field	Translation SHL	SHL	Default Value	Example
	field<n>Key (n=1 ... 20)		AssessmentResult/Results/OverallResult/CompetencyAssessed/CompetencyName		
	field<n>Value (n=1 ... 20)		AssessmentResult/Results/OverallResult/CompetencyAssessed/ProficiencyLevel		
	status	• "Completed" = 0 • "Incomplete" = 1 • "Acknowledged" = 2 • "Initiated" = 2 • "Error" = 99 • "Pending" = ? • "Scheduled" = ? • "In Progress" = ? • "Cancelled" = ? • "Declined" = ? • "x: Deferred" = ?	AssessmentStatus/Status		• "Pending" • "Error" • "Acknowledged" • "Scheduled" • "In Progress" • "Cancelled" • "Declined" • "Completed" • "x: Deferred"
			AssessmentStatus/StatusDate		'2005-02-14

RCM Entity	RCM Field	Translation SHL	SHL	Default Value	Example
	reportURL		UserArea/ReportAccess reportType = "Subject"/InternetLink/		"https://www.select2perform.com/default ? action=viewreport&i=25345 & k=JnR5cGU9c9AiamVjdCZhaWQ9NTk1NDM1JnNpZD0xMTgyODA="
			UserArea/ReportAccess reportType="group"/InternetLink/		
	statusDate				
				Current Date	

7 Setting Up Short Message Service (SMS) Notifications with Recruiting

Integrate the Short Message Service (SMS) feature with Recruiting so that you can send adhoc messages and interview notifications to candidates. You can also use this feature to schedule daily text message reminders that are sent to candidates awaiting interview.

Prerequisites

- You have a contract with **Sinch Messaging for SAP SuccessFactors**. For support, you can:
 - Visit the customer portal, at: <https://support.sinch.com/servicedesk/customer/portal/1> 
 - Email the support team, at: <mailto:support@sinch.com>
 - Call the support team using the phone numbers listed, at: <https://www.sinch.com/contact-us/> 
- If you're using the *Interview Scheduling* feature in Recruiting, you've enabled and configured *Interview Scheduling* to send text messages related to interview schedules.

Procedure

- Open the **Candidate Profile Template** and verify that you've configured the `cellPhone` field, which is used for the candidate's contact number for Recruiting.
- Configure the `phoneCountryCode` and `optInCellNumber` fields in **Candidate Profile Template**.

All fields must have write permissions for both internal and external candidates.

```
<field-definition id="phoneCountryCode" type="picklist" required="true"
custom="false" anonymize="true">
  <field-label mime-type="text-plain"><![CDATA[Country/Region: ]]></field-label>
  <field-description><![CDATA[Country/Region]]></field-description>
  <picklist-id>country</picklist-id>
</field-definition>
<field-definition id="optInCellNumber" type="derived" required="true"
custom="false" anonymize="true">
  <field-label mime-type="text-plain"><![CDATA[SMS enabled for country: ]]></
field-label>
  <field-description><![CDATA[SMS enabled for country]]></field-description>
</field-definition>
<field-definition id="cellPhone" type="text" required="true" custom="false"
anonymize="true">
  <field-label mime-type="text-plain"><![CDATA[Primary Phone: ]]></field-label>
  <field-description><![CDATA[Primary phone number]]></field-description>
</field-definition>
```

- Go to  **Admin Center** , then scroll down to the *Short Message Service (SMS)* section and select the *Enable SMS messaging* option.

4. Enter your **Sinch Messaging for SAP SuccessFactors** account information.

Option	Description
User Name	Enter the username for the Sinch account.
Password	Enter the password. This is automatically masked on the screen.
Account URL	Enter the URL for your Sinch account using this exact format: Sample Code <pre>https://us.sms.sdi.sinch.com/sdi/<AccountName>/<AccountName.sms></pre> Note The default account URL points to a U.S. location. If you know that the data center that hosts your data resides in the European Union, use the following format instead, replacing us with eu: Sample Code <pre>https://eu.sms.sdi.sinch.com/sdi/<AccountName>/<AccountName.sms></pre> Contact Sinch if you need to verify the location of your data center, since you can't choose on your own which URL should apply to your account.

5. Add your desired countries/regions from [Enabled Countries/Regions](#).
6. Save your settings.

Results

You've integrated SMS notifications with Recruiting and can now use the feature to configure text notifications which you want to send to the candidates.

7.1 Using SMS Integration to Send Text Notifications

By using SMS integration, you can send adhoc text messages and interview notifications to candidates. You can also use this feature to schedule daily text message reminders that are sent to candidates awaiting interview.

Prerequisites

Integrate SMS notifications.

Procedure

1. [Creating or Editing Templates for SMS Notifications \[page 58\]](#)
You can create a new template or edit an existing template to add a message to your text notifications.
2. [Assigning Email \(SMS\) Templates to the Recruiting Email Triggers \[page 59\]](#)
You must assign SMS templates to the Recruiting email triggers so that the notifications are sent with a proper SMS message.
3. [Determining the Applicant Status Changes that Trigger SMS Notifications \[page 60\]](#)
You can configure the applicant status changes that should trigger SMS notifications.
4. [Sending Ad-Hoc Text Messages to Candidates \[page 60\]](#)
When Recruiting users need more information from the candidates, they can send ad-hoc text messages to the candidates. Candidates can then log in to their profile and provide the necessary details.
5. [Schedule SMS Notifications \[page 61\]](#)
When the *Upcoming Interview Reminder (SMS)* e-mail trigger is enabled, it kicks off a scheduled job. The job runs every four hours and checks which SMS reminders need to be sent based on the interview reminder configuration on all the interview schedules in the instance.

7.1.1 Creating or Editing Templates for SMS Notifications

You can create a new template or edit an existing template to add a message to your text notifications.

Prerequisites

You have the role-based permission to access [Manage Recruiting Email Templates](#).

Procedure

1. Go to ► [Admin Center](#) ► [Manage Recruiting Email Templates](#) ►.
2. Create a new template or select an existing template for text messages:

Option	Description
Creating a template	Choose Create New Template , then perform the following: 1. Enter the Template Name. 2. Enable the Status and the SMS Status fields. 3. Enter the Subject. 4. Add the message text in the SMS Body.
Using an existing template	Select the template's name or choose Action to open its Edit Email Template page.

Option	Description
	1. Enable the <i>Status</i> and the <i>SMS Status</i> fields. 2. Make sure the <i>Subject</i> field isn't blank. 3. Add the message text in the <i>SMS Body</i>.

Results

You can now assign the SMS message templates to Recruiting email triggers that support SMS notifications.

Task overview: [Using SMS Integration to Send Text Notifications \[page 57\]](#)

Next task: [Assigning Email \(SMS\) Templates to the Recruiting Email Triggers \[page 59\]](#)

7.1.2 Assigning Email (SMS) Templates to the Recruiting Email Triggers

You must assign SMS templates to the Recruiting email triggers so that the notifications are sent with a proper SMS message.

Context

After you've integrated the SMS service with Recruiting, *Manage Recruiting Triggers* page lists the email triggers that support text notifications.

Procedure

1. Go to ► *Admin Center* ► *Manage Recruiting Triggers* ►.
2. Select *Enable SMS* option for *Upcoming Interview Reminder (SMS)*, *Schedule Interview Reminder (SMS)*, and *Candidate Opt-In SMS* email triggers.
3. Assign a suitable *Email Template*.
4. Select *Validate Standard Tokens*.
5. Select *Save* to save the email trigger upon successful validation of all the standard tokens.

Task overview: [Using SMS Integration to Send Text Notifications \[page 57\]](#)

Previous task: [Creating or Editing Templates for SMS Notifications \[page 58\]](#)

Next task: [Determining the Applicant Status Changes that Trigger SMS Notifications \[page 60\]](#)

7.1.3 Determining the Applicant Status Changes that Trigger SMS Notifications

You can configure the applicant status changes that should trigger SMS notifications.

Procedure

1. Go to ► [Admin Center](#) ► [Edit Applicant Status Configuration](#) ►.
2. Edit the required status from [Take Action](#) column.
3. Scroll down to the [SMS](#) category and assign templates for internal and external candidates.
4. Select [Save](#) to save your changes.

Results

Whenever there's a change in the configured applicant status, text notifications are triggered and sent to the candidates automatically.

Task overview: [Using SMS Integration to Send Text Notifications \[page 57\]](#)

Previous task: [Assigning Email \(SMS\) Templates to the Recruiting Email Triggers \[page 59\]](#)

Next task: [Sending Ad-Hoc Text Messages to Candidates \[page 60\]](#)

7.1.4 Sending Ad-Hoc Text Messages to Candidates

When Recruiting users need more information from the candidates, they can send ad-hoc text messages to the candidates. Candidates can then log in to their profile and provide the necessary details.

Prerequisites

- Integrate SMS notifications.
- Applicants have opted-in for receiving SMS notifications.

Procedure

1. Go to ► [Recruiting](#) ► [Job Requisitions](#) ►.
2. Select one or more candidates in the talent pipeline for a job.
3. Choose ► [Action](#) ► [Contact Candidate](#) ►.
4. Choose [SMS](#) or [Both](#) as the contact method.
5. Select a template and enter the SMS body.
6. Select [Next](#) to preview and send the text message.

Task overview: [Using SMS Integration to Send Text Notifications \[page 57\]](#)

Previous task: [Determining the Applicant Status Changes that Trigger SMS Notifications \[page 60\]](#)

Next: [Schedule SMS Notifications \[page 61\]](#)

7.1.5 Schedule SMS Notifications

When the [Upcoming Interview Reminder \(SMS\)](#) e-mail trigger is enabled, it kicks off a scheduled job. The job runs every four hours and checks which SMS reminders need to be sent based on the interview reminder configuration on all the interview schedules in the instance.

For example, candidate John books an interview for Friday, May 8 at noon PST, and interviewer Jane schedules an SMS reminder one day before. John receives the SMS notification on Thursday, May 7, between 8 am and noon PST.

ⓘ Note

Scheduled reminders apply to every interview scheduled for a single job requisition. Changing the scheduled reminders for an interview on a requisition changes the reminders for all interviews for the requisition.

Schedule SMS reminders to candidates to remind them of their interview time. Schedule a separate reminder to remind candidates to book a slot using self-scheduling.

You can send interview time reminders on multiple days, if necessary. For example, an SMS reminder can be sent 3 days after a candidate is invited for an interview, 5 days after, and 6 days after.

Parent topic: [Using SMS Integration to Send Text Notifications \[page 57\]](#)

Previous task: [Sending Ad-Hoc Text Messages to Candidates \[page 60\]](#)

7.2 SMS Interview Notifications

Customers can choose to send the Interview Notification e-mail to candidates as SMS or send both SMS and e-mail. Both SMS and e-mail are tracked from the correspondence portlet in the application.

You can trigger SMS notifications from several areas of the application.

- The [Candidate Opt-in](#) page (to opt-in)
- The [Interview Scheduling Contact Candidates](#) page (to invite candidates for interviewing)
- [Interview Setup](#) page (as a daily scheduled reminder for upcoming booked interviews)
- The list of candidates in the [Not Booked](#) status of an interview schedule
- The list of candidates in the [Booked](#) status of an interview schedule (to notify candidates of a change at the last minute). For booked interviews, the candidates and interviewers can also see the interview date and time in e-mails and SMSes.
- The Candidate Pipeline. When a candidate's status changes in the pipeline, an SMS and e-mail are triggered.

Once SMS Interview Notifications are enabled, a candidate can opt-in to receiving SMS messages on their candidate profile. The candidate enters their phone number and checks [Send me SMS notifications](#).

Enabling SMS in a company instance changes the label [Email Candidate](#) on the contact page to [Contact Candidate](#). The Recruiter can send SMS and/or e-mail to candidates, depending on permissions. SMS cannot be sent to agencies, only candidates.

Note

1. SMS cannot be triggered to other recruiting users because only candidates can opt in to SMS on their candidate profile.
2. When a candidate creates an account, SAP SuccessFactors does not send any welcome SMS to the candidate. Once the account is created successfully, the candidate can opt-in to start receiving SMS notifications.

7.3 Opting Out of Short Message Service (SMS) Notifications in Recruiting

Candidates can opt out from receiving SMS notifications from Recruiting.

Context

To use text message functionality in some countries/regions, for example, North America (U.S. and Canada numbers), the receiver of the text message must have a way to opt out of receiving texts. As an admin user, you can configure the welcome SMS message with instructions on how candidates can opt out of the notifications.

Procedure

1. Go to ► [Admin Center](#) ► [Manage Recruiting Email Templates](#) ►.
2. Select the [Welcome to SMS](#) email template, and type the instructions in the [SMS Body](#).

The wording for instructions is customer driven, and you must check with the **Sinch Messaging for SAP SuccessFactors** team for the right keywords (such as **STOP**) and short code (which is the phone number). For support, you can:

- Visit the customer portal at <https://support.sinch.com/servicedesk/customer/portal/1> ►.
- Email the support team at support@sinch.com ►.
- Reach the support team via the phone numbers listed here <https://www.sinch.com/contact-us/> ►

❖ Example

This wording is an example only: "You can opt out of receiving text message by replying STOP to this number or by updating your Candidate Profile."

8 User Accounts in External Third-Party Systems

Sometimes third-party vendors issue their own usernames and passwords to be used in the integration with SAP SuccessFactors. To facilitate the integration, Recruiting maintains the third-party username and password and associates it with a SAP SuccessFactors user account.

To configure the external user accounts, you need ► [Manage Recruiting](#) ► [Manage External User Accounts permission](#) ► permission.

External user accounts are managed via CSV file imports. The CSV import must include the following data:

<i>Column header</i>	<i>Expected content</i>
USER_NAME	SAP SuccessFactors account that is associated to this third-party user account. Must contain a user ID or, if the third-party account should be associated to all user accounts, it's possible to enter * as a value
EXTERNAL_PARTNER_CODE	Indicates which third-party vendor this account comes from
PARTNER_USERNAME	Account username provided by the third-party vendor
PARTNER_PASSWORD	Account password provided by the third-party vendor

External user accounts can be imported or exported.

If external user accounts are exported, the password exports blank. This is done for security purposes and is expected behavior. The client should keep a record of their passwords in a secure location.

9 Adding Custom Tracking to Application Confirmation Page

When integrating Recruiting with third-party vendors for candidate application tracking, it might be required to add HTML custom tracking to an application confirmation page.

Prerequisites

Ensure that [Complete Profile Before Application](#) is enabled in Provisioning to be able to customize the Application Submit Pages and add Pixel Tracking codes.

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Context

Adding custom (pixel) tracking impacts all completed applications in Recruiting Management. You can apply multiple vendor pixels without any conflicts.

Procedure

1. Go to ► [Admin Center](#) ► [Manage Recruiting Settings](#) ►.
2. Scroll down to "[Application Submit Page](#)" - [Internal Career Site](#) or "[Application Submit Page](#)" - [External Career Site](#) based on the type of application (internal or external) and click [Custom Message](#).
3. On the Edit pane, click [Source](#) and enter the pixel code.

To embed the tracking pixel, the edit must be done in the source section. Once you embed the code, it isn't visible on the main screen.

→ Remember

Ensure that you repeat this process, if multiple job languages are available.

4. Click [Save](#).

Change History

Learn about changes to this guide in recent releases.

1H 2024 Release

Type of Change	Description	More Info
Changed	We've clarified that only assessment status is available in the redesigned Application Management tool, for these topics.	Working with Assessment Integration [page 40] Assessment Integration Known Behaviors [page 42] Assessment Integration Frequently Asked Questions [page 43]

2H 2023 Release

Type of Change	Description	More Info
February 2, 2024		
Changed	We've clarified that information related to the assessment score in these topics are available only in the legacy Candidate Workbench.	Working with Assessment Integration [page 40] Assessment Integration Known Behaviors [page 42] Assessment Integration Frequently Asked Questions [page 43]
January 19, 2024		
Changed	We've updated the account URL description to include information for accounts that are hosted in data centers located in the European Union.	Setting Up Short Message Service (SMS) Notifications with Recruiting [page 56]
Changed	We've moved <i>Change History</i> to the end of the guide.	This page.

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