Assessment Connector

Edge Integration Guide

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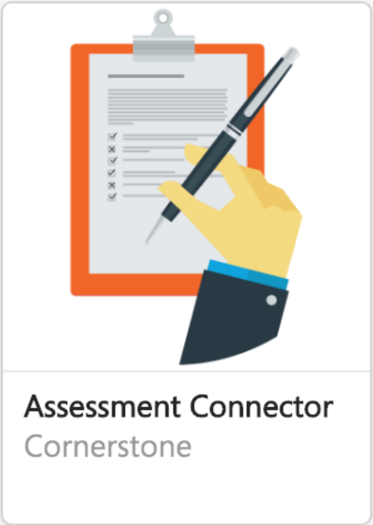
Version history

	DATE	DESCRIPTION
1.0	10/25/2018	Original version

Overview

Cornerstone's Assessment Connector provides organizations the ability for their preferred pre-hire assessment provider to integrate with Cornerstone. Cornerstone provides the end-to-end workflow information and the toolkit for external developers to build services required to set up the integration.



Enablement

The integration is available from Cornerstone at no additional charge. Howerver, there are three basic requirments:

1. Cornerstone Recruiting
2. Account with a preferred pre-hire assessment provider
3. Provider or 3rd party development team

Only one assessment provider can be integrated in your Cornerstone portal using the connector.

Prerequisite setup

1. Have your assessment provider or 3rd party engineering/software development team review the Assessment Connector documentation within the API Explorer.

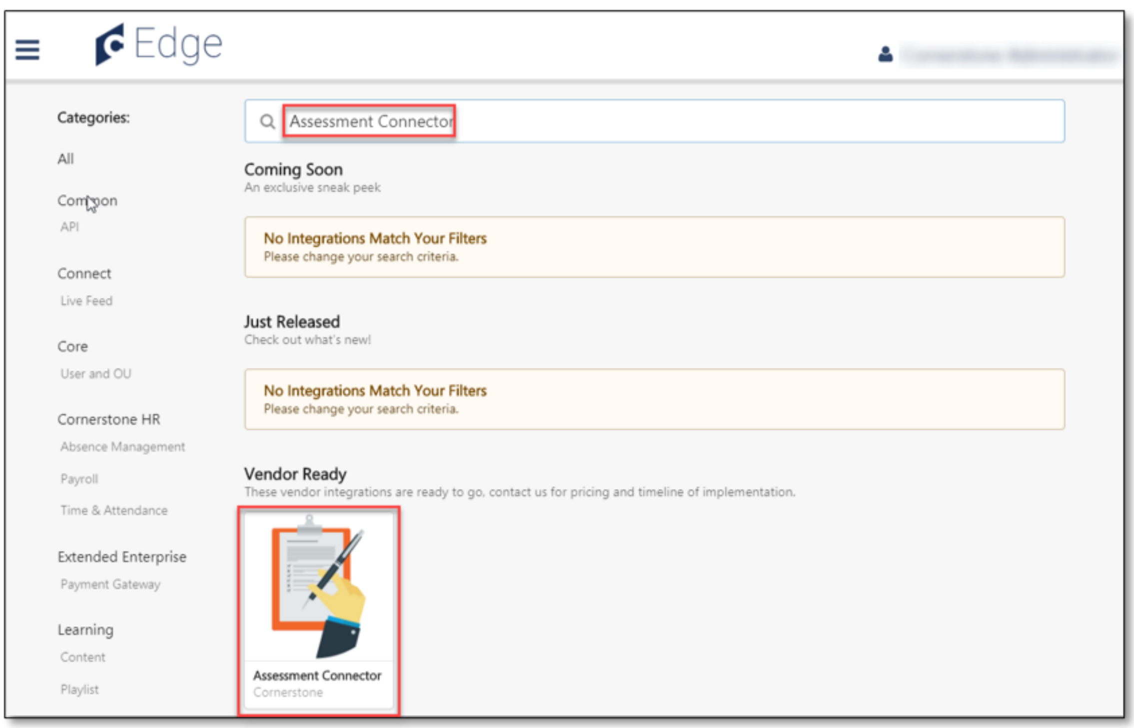
2. Assessment provider or 3rd party engineering/software development team develops the integration based on the requirements provided in the Assessment Connector documentations.

Setup instructions

The integration can be self-installed in your CSX Stage or Pilot to support your testing exercise. When ready to move to Production, please reach out to your Cornerstone Client Executive to have the integration installed in your CSX Production portal.

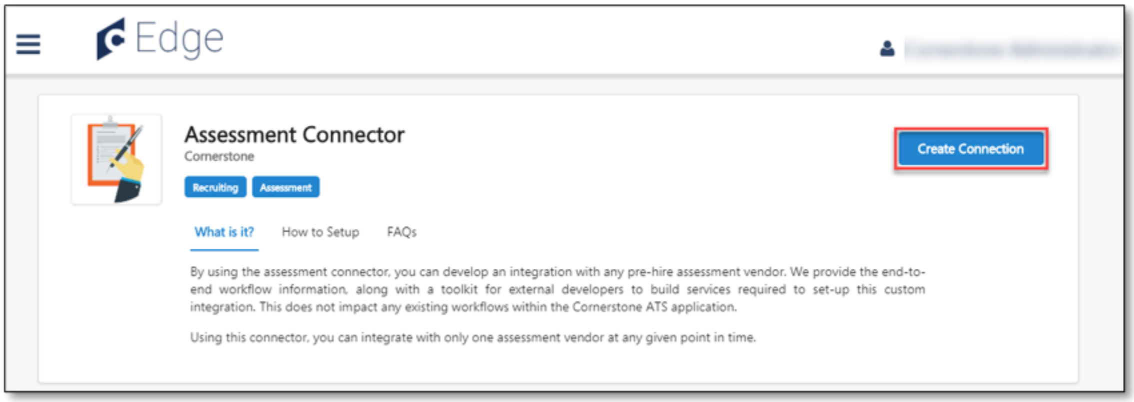
Once enabled in Production by your Cornerstone Client Executive, start at Step after navigating to Admin Tools > Edge > Integrations and selecting the Assessment Connector's Confguration button.

1. Log in to your Cornerstone portal.
2. Navigate to the **Edge Marketplace** (Admin > Tools > Edge > Marketplace).
3. Search for **Assessment Connector** then click on the **Assessment Connector** tile.

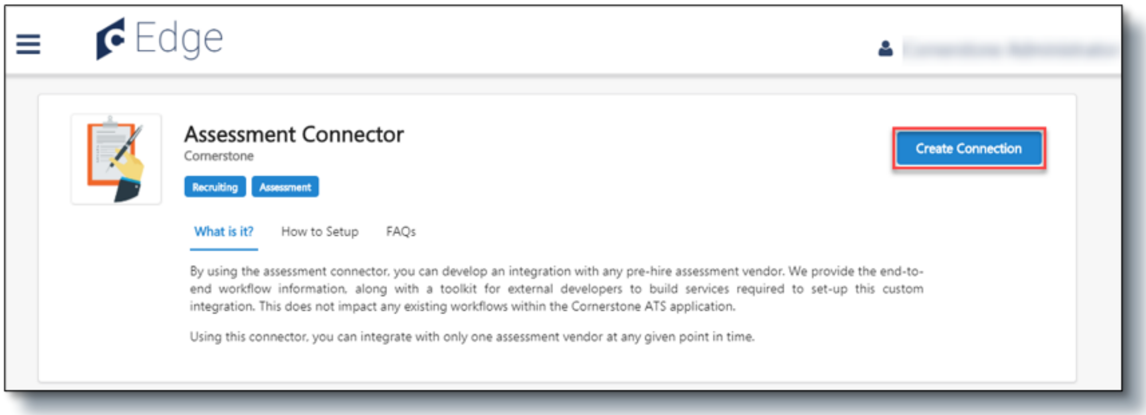


4. Click on **Create Connection**.

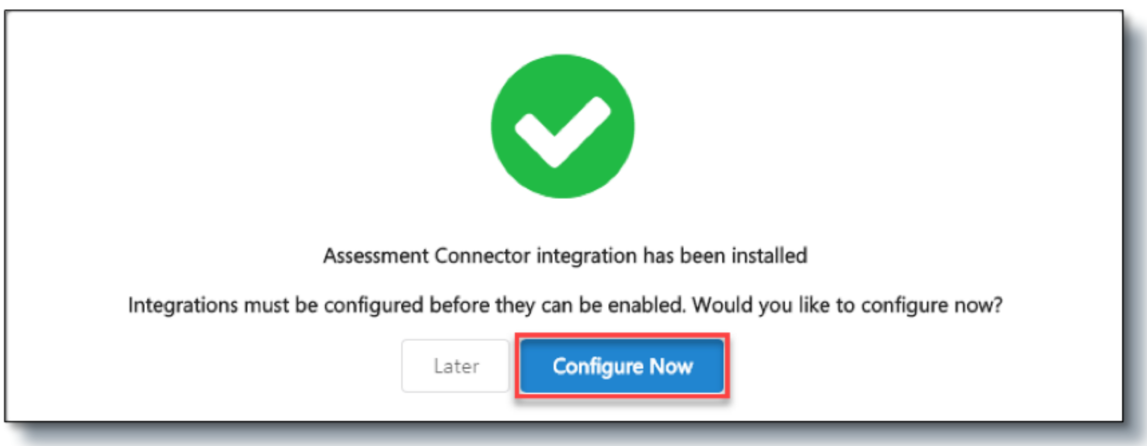
5. Enter your assessment provider information then click **Submit**.



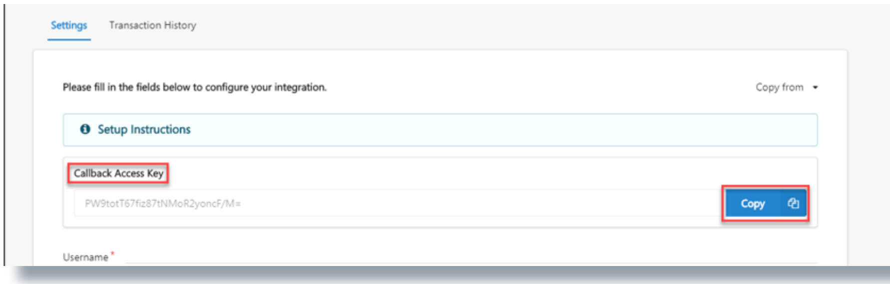
6. Click on **Configure Now**. You will then be directed to the **Settings** page.



7. Copy the **Callback Access Key** value by clicking on the **Copy** button and provide to your vendor/development team. This key will be required by your development team to establish a connection when sending assessment status/updates back to Cornerstone.



8. Configure the integration on the **Settings** page.



a. **Username**: This is the username provided by your vendor/development partner to authenticate the request from Cornerstone Recruiting to the assessment provider.

b. **Password**: This is the password for the username provided by your vendor/development partner to authenticate the request from Cornerstone Recruiting to the assessment provider.

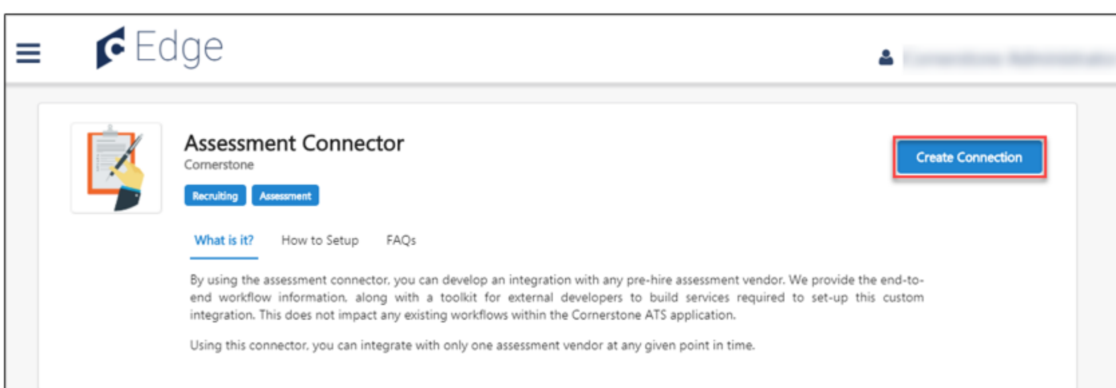
c. **Base Service URL**: This is the base URL endpoint for all the assessment webhooks. This is provided by your vendor/development team.

d. **Field Configuration**: This is the list of available fields that Cornerstone may send to your assessment provider when assessment request is assigned to an applicant. Select the fields by turning on the toggle switch. Share the list of selected fields to your vendor/development partner to inform them of the fields to expect in the assessment order request. See Appendix B: Field Mapping for field description.

- **NOTE**: Your vendor/development partner must be notified BEORE making any changes to the selected fields to ensure that the integration does not break. This will allow them to make the necessary changes, if needed.

9. Click on **Save Settings** which will take you to the **Manage Integrations** page.

10. Search for **Assessment Connector** integration and enable the integration by turning on the toggle switch.



ASSIGN ASSESSMENTS

There are two methods to assigning applicants an assessment:

1. Application Workflow – applicant can launch the assessment when completing the application
2. Manage Applicants – applicant can be assigned to an assessment ad hoc through the Assign Integration action item on the Manage Applicants page

Application Workflow

To assign the assessment to applicants during the application process, the assessment can be added to a step within the Application Workflow.

Access Application Workflow

1. To access the **Application Workflow Templates**, go to Admin > Tools > Recruit. Then, click the Applicant Workflow Templates link in the Applicant Tracking section
2. To access **Default Requisition Templates**, go to Admin > Tools > Recruit. Then click the Default Requisition Templates link in the Applicant Tracking section
3. To manage **job requisitions**, go to Recruit > Manage Requisition
4. To access **Requisition Templates**, go to Admin > Tools > Recruit. Then, click the Requisition Templates link in the Applicant Tracking section

Add Assessment to the Application Workflow

1. Click the Add Section icon to add a section to the application workflow that will include the assessment integration. Name the section in the Add Section pop-up. Note: You can also add the assessment integration to an existing section.
2. From within the section, add the Add Action Item dropdown and select **Custom Integration**. This opens the Edit Action Item pop-up.

3. Complete the following fields in the pop-up:
   - **Title** – Enter a descriptive value in the Title field. The is a required field with a character limit of 50.
   - **Instructions** – Enter instructions for the action item. This field is optional and accepts HTML and does not have a character limit.
   - **Integration** - Select Custom Assessment. This displays a new dropdown where you can select the assessment.
4. Save the page.
5. Create a new job requisition to include the custom application workflow.

When applying for a position, applicants can launch the assessment when completing their application.

Manage Applicants

When assigning assessment to an applicant outside of an application workflow, create a new Applicant Status. Note: The Assign Integration Assessment email trigger email will need to be configured for the applicant to receive an email. See Appendix C: Email Administration for details.

Add Applicant Status

1. Navigate to **Applicant Statuses** (Admin > Tools > Recruit)
2. Click on the **Create Custom Status** link. This opens the Create Custom Status pop-up.
3. Complete the fields in the pop-up
   - **Language** – To localize the status name and description into other available languages, select the appropriate language from the dropdown list and enter the localized name and description in the appropriate fields.
   - **Display Name** – The status name which appears throughout the system. The character limit for this field is 50.
   - **Description** – Describe the purpose of the status and what is implied when an applicant is in that status. The character limit for this field is 500. This is not a required field.
   - **Type** – Select Custom Integration from the dropdown. Note: This field is displayed only when creating a custom status at the top level OU. When creating a custom status for a child OU, the Type field displays the type selected for the parent OU but is not editable.
   - **Integration** – Select Custom Assessment from the dropdown.
   - **Active** – Ensure the field is checked before saving the status so that the status is active for the portal.

4. Save the custom applicant status and create a new job requisition to include the new custom applicant status.

To assign an assessment from the Manage Applicant page:

1. Navigate to the Manage Applicants page.
2. Select the applicant(s) and change their applicant status to the previously created custom applicant status associated with the assessment integration.
3. While the same applicant(s) is selected, select the **Assign Integration Assessment** option from the **Actions** dropdown. This opens the Assign Integration Assessment pop-up.
4. Under the Assessment column on the Assign Integration Assessment pop-up, select the assessment you want to assign the applicant.
5. Click Submit

Applicant will receive an email notification which includes an assessment link. The applicant can launch the assessment by clicking on this link.

Appendix

A. Security Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicant Status Bank - Manage	Grants ability to access and manage Applicant Status Bank.	Recruiting
Edge Integrations - Manage	Grants access to the Integrations service for Edge Integrate where the administrator can configure, enable, and disable their third-party integrations that are used within the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge
Applicants: Assign Assessment Integration	Grants access to manage assessment integrations from the Applicant Profile page. This applies to assessments that have been configured in the integration center. This permission cannot be constrained. This permission is only available for portals that have an active assessments integration. This is the highest level of permission for this functionality. In addition to being able to assign assessments, users with this permission will be able to view the assessment status and assessment details.	Recruiting

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Application Workflow Template - Manage		Recruiting Administration
Application Workflow Template - View	Grants ability to access and view Application Workflow Templates.	Recruiting Administration
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
Applicants: Assign Assessment Integration	Grants access to manage assessment integrations from the Applicant Profile page. This applies to assessments that have been configured in the integration center. This permission cannot be constrained. This permission is only available for portals that have an active assessments integration. This is the highest level of permission for this functionality. In addition to being able to assign assessments, users with this permission will be able to view the assessment status and assessment details.	Recruiting

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Global Email Administration - View	Grants view only access to email templates/triggers and email logs at the global level for the portal. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. Note: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the Requisition: Manage permission overrule those of the Requisition: Owner permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.	Recruiting

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. Note: This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Note: If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the Requisition: Reviewer permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the Requisition: Reviewer permission. See Applicant Profile Page Overview for more information about duplicate reviewer instances.	Recruiting

B. Email administration

Emails are triggered when a user is assigned the assessment outside of the application workflow (i.e. through the Manage Applicant page.

ACTION	DESCRIPTION/TRIGGER	EMAIL TAGS
Assign Integration Assessment	This email is triggered when a user is assigned an assessment outside of the application workflow. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, OU Approver, Requisition Owner. This email can be configured as a Notification or Reminder type email. This email is active by default and can be found in the Recruitment action type section of Email Management.	The **APPLICANT.INTEGRATION. ASSESSMENT.LINK** tag must be included in the email. This tag provides a link the applicant can click to access the assessment.

C. Field mapping

To assign the assessment to applicants during the application process, the assessment can be added to a step within the Application Workflow.

ITEM #	SECTION	FIELD LABEL	FIELD DESCRIPTION
1	Assessment Data	Assessment ID	• Vendor-provided ID of assessment assigned to the candidate • Required field • Toggle switch on the Setting page is enabled and grayed-out by default
2	Assessment Data	Job Requisition ID	• Job requisition ID applicant is applying for • Required field • Toggle switch on the Setting page is enabled and grayed-out by default
3	Assessment Data	Timestamp	• Timestamp of when assessment order request is initiated • Current date-time of request in UTC
4	Assessment Data	Integration order ID	• Cornerstone-generated unique ID for each assessment order request sent to the provider

ITEM #	SECTION	FIELD LABEL	FIELD DESCRIPTION
5	Applicant Data	Applicant First Name	• First name of applicant assigned to the assessment
6	Applicant Data	Applicant Last Name	• Last name of applicant assigned to the assessment
7	Applicant Data	Applicant Middle Name	• Middle name of applicant assigned to the assessment
8	Applicant Data	Applicant Prefix	• Prefix of applicant assigned to the assessment
9	Applicant Data	Applicant Suffix	• Suffix of applicant assigned to the assessment
10	Applicant Data	GUID	• Cornerstone-generated unique ID of applicant
11	Applicant Data	Applicant Language Preference	• Preferred language of applicant assigned to the assessment
12	Applicant Data	Type	• Type of applicant (Internal or External)
13	Applicant Data	Recruiter Email	• Email address of the job requisition's primary owner • Field is required • Toggle switch on the Setting page is enabled and grayed-out by default
14	Organizational Unit	Division OU Name	• Division OU name of job requisition applicant is applying for
15	Organizational Unit	Cost Center OU Name	• Cost Center OU name of job requisition applicant is applying for
16	Organizational Unit	Position OU Name	• Position OU name of job requisition applicant is applying for
17	Organizational Unit	Grade OU Name	• Grade OU name of job requisition applicant is applying for
18	Organizational Unit	Location OU Name	• Location OU name of job requisition applicant is applying for

ITEM #	SECTION	FIELD LABEL	FIELD DESCRIPTION
19	Organizational Unit	Location OU ID	• Location OU ID of job requisition applicant is applying for
20	Applicant Contact Information	Email Address	• Email address of applicant
21	Applicant Contact Information	Mobile Phone	• Mobile phone number of applicant
22	Applicant Contact Information	Home Phone	• Home phone number of applicant
23	Applicant Contact Information	Phone	• Phone number of applicant
24	Applicant Address Information	Address Line 1	• Address line 1 of applicant
25	Applicant Address Information	Address Line 2	• Address line 2 of applicant
26	Applicant Address Information	City	• Address city of applicant
27	Applicant Address Information	State	• Address state of applicant
28	Applicant Address Information	Postal/Zip Code	• Address postal/zip code of applicant
29	Applicant Address Information	Country	• Address country code of applicant
30	Job Requisition	Job Requisition Primary Owner Name	• First and last name of the job requisition Primary Owner
31	Job Requisition	Job Requisition Email	• Email address of the job requisition's primary owner
32	Job Requisition	Job Requisition Display Job Title	• Job requisition display job title
33	Job Requisition	Job Requisition Country	• Job requisition primary location OU country