Support article – SmartRecruiters

This guide details how to configure and use the integration between Fairec and SmartRecruiters.

The guide is split into two parts:

- First part describes how to enable the integration. This part is intended for Fairec users with tenant owner permissions or similar.
- The second part describes how to use the integration features and is intended for Fairec users with recruiter permissions or similar, that is, users who conduct screening in Fairec.

Support:

Fairec's support can be reached by email, at: support@fairec.io. The inbox is monitored during regular business hours (CEST).

Changelog:

- V1: Initial version, integration configuration is based on a Fairec username & password.
- V2: Integration must be configured with a Fairec API key. Previous configurations from "v1" still work.

Guide 1: Enabling the integration

Requirements:

(1) A Fairec user account with permissions "Manage ATS integration" and "Manage API keys". These permissions can be granted by assigning the "Tenant owner" role to the user.
(2) A SmartRecruiters user account with Administrator accesses.

Fairec user roles and permissions can be found at: https://platform.fairec.io/users

Steps:

1) In your SmartRecruiters tenant, create an API key. This can be done by following the steps in: SmartRecruiters guide. You need to grant a list of permissions to this key, either by assigning them directly or by assigning a role to the key. These are required:
    a. *Access Candidates*
    b. *Manage Candidate Status and Properties*
    c. *Access Candidate's status*

d. *Access job applications*
e. *Access Company Settings*
f. *Access Jobs*
g. *Access information about my user*
h. *Access Reviews*
i. *Create, update, and delete reviews*
j. *View, create and delete webhook subscriptions.*

2) Navigate to https://platform.fairec.io/settings/api-keys
   a. Create an API key, by clicking "Add key"
   b. Fill in Name and optionally a description.
   c. For permissions, select the "Smartrecruiters integration" permission.
   d. Press "Create" and save the token which is displayed afterwards.
3) Navigate to https://platform.fairec.io/settings/integration, and click the SmartRecruiters icon.
4) Fill in the required details:
   a. "SmartRecruiters API Key" refers to the API Key created in step (1).
   b. "Fairec API key" refers to the API key created in step (2).
5) The integration should now be active. If an error occurs, retry the above steps or reach out to Fairec's support.

Guide 2: Using the integration

Requirements:

(1) A Fairec user account with permission "Manage job posts". This permission can be granted by assigning the "Recruiter" role to the user.
(2) A working integration between SmartRecruiters and Fairec. See above guide.

Configuring a job integration:

1) Navigate to: https://platform.fairec.io/job-posts/create
2) You will be prompted to select a job to integrate with. Select a job, and press "Continue".
3) Now you can configure triggers:
   a. The first trigger, "Mail invitation" must have a stage selected. Select a fitting stage, and if applicable, a sub-stage. The first time a candidate reaches the selected (sub)-stage in SmartRecruiters they are automatically sent to Fairec.
   Warning: All candidates who are within the selected (sub)-stage upon activating the job integration, are sent to Fairec. If this is unwanted, move the candidates away from the (sub)-stage, before activating the job integration.

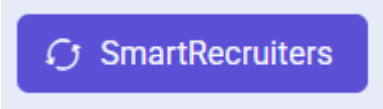
b. Select “Status sync” triggers, which work on Fairec statuses like “Shortlist”. These are optional. Select fitting (sub)-stages. The first time a candidate has the corresponding status in Fairec they are moved to the selected (sub)-stage.
Warning: Cascading automation. If “Status sync” triggers are enabled, an applicant might be moved to a stage in SmartRecruiters. If this stage also has automation enabled, this automation also starts. That might cause unwanted actions.

4) Press “Import” to finish importing the job.
5) Complete the job calibration inside Fairec.

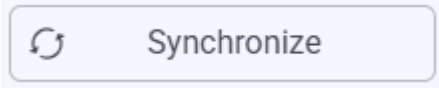
Managing a job integration:

Navigate to https://platform.fairec.io/job-posts/{ID}, where “ID” is the ID of the job post which has an active integration. You can also find this through https://platform.fairec.io/job-posts, and select the job.

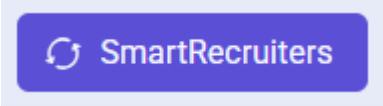
1) **Instant sync**
Some data properties between Fairec and SmartRecruiters are synced every hour. However, you can force an instant sync by:
a. Click the “SmartRecruiters” button in the top of the page:



b. A dialog opens. Press the button “Synchronize”:



2) **Deleting the job integration**
If required, the job integration can be deleted:
a. Click the “SmartRecruiters” button in the top of the page:



b. A dialog opens. Press the button “Delete”:

