Custom fields for Offer Letter

Issues

On the ATS, clients can have different configurations, only a few basic fields are common for all of them: first name, last name, address, etc.

That's problematic because we can't do a real fix mapping, because it could be different from one customer to the next.

Example 1

- "**Previous company**" could be ***freeText1*** on a client but "freeText4" on another one. And not existing on a third client!

Example 2

- "Last name" will always set as "**prenom**" on all clients

I will provide a complete list of the common fields later in this article.

Solution

The best solution we found here is to add an extra mapping between DMS and ATS that will be made directly by the client.

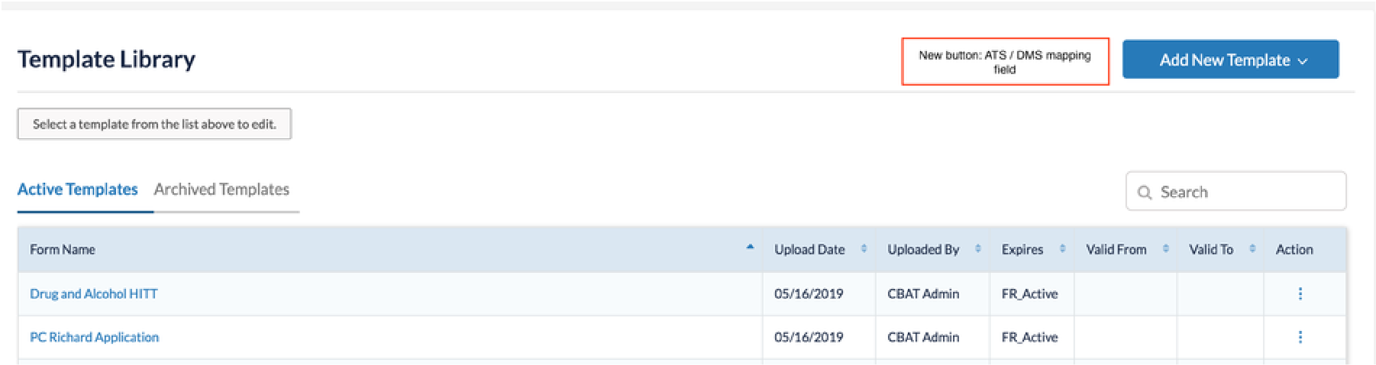
We have thought to an automatic mapping between both entities but we should have to map fields regarding translations, so we could have some issues with this, it will never be 100% reliable.

It's why with a human intervention, no issue possible.

And this mapping will be done only once and then it will be good forever. It will be the client responsibility to do it.

New mapping option

So to do this, on DMS side, we need to add a new page to do this mapping. For example adding a new button in the **Template Library**:



New button: ATS / DMS mapping field

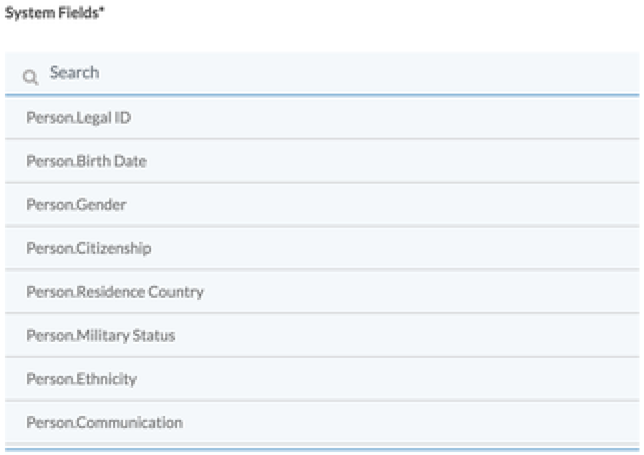
Form Name	Upload Date	Uploaded By	Expires	Valid From	Valid To	Action
Drug and Alcohol HITT	05/16/2019	CBAT Admin	FR_Active			⋮
PC Richard Application	05/16/2019	CBAT Admin	FR_Active			⋮

On this page, we could have two lists:

- DMS available fields
- ATS available fields

DMS fields

Actually this list is already build when creating a new template, so it can be used again here.



System Fields*

- Person.Legal ID
- Person.Birth Date
- Person.Gender
- Person.Citizenship
- Person.Residence Country
- Person.Military Status
- Person.Ethnicity
- Person.Communication

ATS fields

To get all fields available for a client, it's possible to two endpoints, one for the candidate and another one for the requisition:

- http://php56-sandbox-16.luceosolutions-dev.com/rest/metadata/candidate
- http://php56-sandbox-16.luceosolutions-dev.com/rest/metadata/requisition

Here is a part of the response

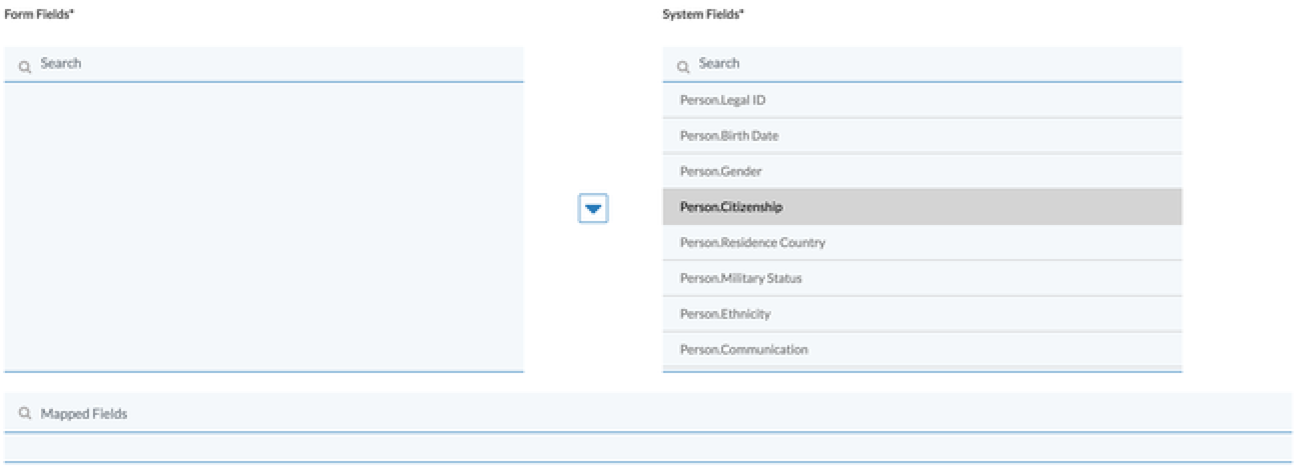
```
{
        "id": 5,
        "type": "string",
        "custom": true,
        "section": "Profile",
        "label": "Preferred Name",
        "mandatory": false
    },
```

With this, you can build the datasource as following:

- key: **id**
- label: **section** - **label**

Mapping

For the mapping part, the client just have to choose one field from DMS, one field from the ATS, and merge them, like you did here:



On DMS side, you have to map your id with our, and save all the mapping in the database in json or what you want.

For example, "Preferred Name" is Id 5 in the ATS, and 12 on DMS side (value="12~Person.Preferred Name").

API call

That means we are going to update what we are sending DMS in this endpoint: /api/candidate/document/create

The payload will be something like this:

```
$payload = [
         'templateIds' => [55, 23],
            'sendDocument' => true,
            'sourceProduct' => 'CBATS',
            'sourceUserId' => 467, // candidate Id
            'requisitionId' => 33, // requisition Id
        ];
```

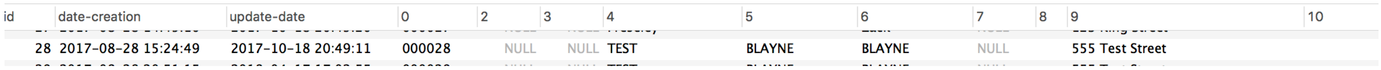
Just basic information, candidate Id and requisition Id.

DMS will be able to get all candidate / requisition data through an API call to the ATS.

Get values to replace tags

Because DMS has just a requisition id and a candidate id, to get all data, they need to call a endpoint on the ATS (which is not implemented for now).

Here is a POC of what we can return:



id	date-creation	update-date	0	2	3	4	5	6	7	8	9	10
28	2017-08-28 15:24:49	2017-10-18 20:49:11	000028	NULL	NULL	TEST	BLAYNE	BLAYNE	NULL		555 Test Street	

Columns are the **ids** on the ATS side. So to replace the tags, DMS needs to use the mapping done by the client, and replace the tag by the correct value for a given id.

Going back to our first example "Preferred Name" (id 5), the tag will be replaced by "BLAYNE" for this candidate.

Conclusion

There is extra logic here, most of it has to be managed directly by DMS because they are replacing the tags and sending the document.

It's the only solution we found to get something half-automatic, and to avoid to lose time to parameter manually all the tags like it was done for

Sertifi.

On the ATS side, we just have to create a new endpoint (or two) to return all requisition / candidate data for a given id.