



UKG Ready integrations require following steps to complete the configuration within the application. DISA is providing this activation guide to walk you through each of these steps.

1. OAuth Profile Setup
2. Integration Configuration-OAuth Configuration
3. Create Custom Hiring Stages
4. Create Custom Fields

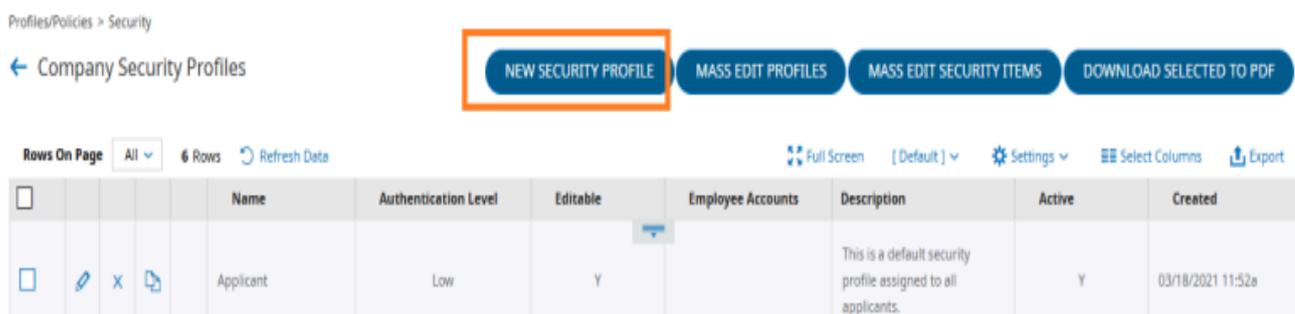
**NOTE – If you have an existing integration with UKG Ready, you will not be able to edit it. You will need to create a new company set up.**

## OAuth Profile Setup

1. Login **UKG Ready**. On the home page, in the search box search for **Security**. Select **Security (Profile/Policies)** from the **Menu**.



2. Click on **NEW SECURITY PROFILE** button.



3. To limit the API access to only limited (required) API services, fill the details and check the options as shown below in the sample as needed for your account. Not all setting will be required.

# Security Profiles

Admin > Profiles/Policies > Security

Security Profile				
Company	DISA			
Security Profile	DISA_SecurityProfile			
First Screen	Dashboard			
Max Inactive Time (sec)	1800			
Display Timeout Warning	Yes			
Authentication Level	High			
Global - Company Setup				
Cost Centers Configuration		View	Edit	Add
HR Settings		Yes	Yes	
Lists Definitions		Yes	Yes	
Global - Global Setup				
Cost Center Definitions		View	Edit	Add
Cost Center Trees		Yes	Yes	Yes
Jobs		Yes	Yes	Yes
OAuth Applications		Yes	Yes	Yes
Global - Look & Feel				
System				
Global - Object Lists				
Cost Centers		View	Edit	Delete
Jobs		Yes	Yes	Yes
Security Profiles		Yes	Yes	Yes
Global - System				
Data Export Settings				
Report Settings				
TLM - Time Off Documents				
		Permission	Add	Delete

TLM - Punch Documents			
		Permission	Add
			Delete
TLM - Counter Distribution Request Configuration			
		Permission	Add
			Delete
Payroll - Global Setup			
Report Codes		View	Edit
		Yes	Add
			Delete
Payroll - Tax Edit Option			
Tax Edit Option		Permission	
HR - Compensation Management			
		Permission	Add
			Delete
HR - Employee Inventory Items			
	No Inventory Profiles Defined		
HR - Employee Management			
Employee Information (My Team)		Permission	Add
Account/Personal Information (Manager Access)		View	
Cost Centers		View/Edit	
Employee Contacts		View	
Extra Fields		View	
HR Custom Values		View	
Jobs		View/Edit	
Profiles		View	
Workflow Questionnaires			Yes
HR - Employee Related Functions			
Change Password			
Clear Employees Auth App Registration		(All Company Employees)	
Unlock Employee Account			

## General Settings: Security Profiles (2 of 3)

HR - HR Tables				
Custom Fields		View	Edit	Add
HR Action		Yes	Yes	Yes
HR - Leave of Absence Request Documents				
		Permission	Add	Delete
HR - Manager Assigned Custom Form Items				
	No Custom Forms Defined			
HR - Manager Initiated HR Actions				
	No HR Actions Defined			
HR - Position Management				
Company Settings		Permission	View/Edit	Add
				Delete
HR - Rates				
		Permission	Add	Delete
HR - Recruitment				
All Forms Report		Permission	Add	Delete
Applicant Group		View		
Applicant Profile Configuration		View		
Applicants		View/Edit	Yes	Yes
			(See All Applicants)	
Configuration		View/Edit	Yes	Yes
Hiring Stages Configuration		View/Edit	Yes	Yes
Job Application Statuses		View/Edit	Yes	Yes
Job Applications		View/Edit	Yes	Yes
			(See All Job Applications)	
			(Mass Edit)	
Job Requisition Custom Fields Definitions		View/Edit	Yes	Yes
Job Requisition Custom Values		View/Edit	Yes	Yes
Job Requisition Hiring Stages		View/Edit	Yes	Yes
Job Requisition Workflow		View/Edit	Yes	Yes
Job Requisitions		View/Edit	Yes	Yes
			(See All Job Requisitions)	
			(Close/Open Job Requisitions)	
			(Edit Submitted/Approved)	
Use Job Board		View/Edit		
HR - Succession Planning				
		Permission	Add	Delete

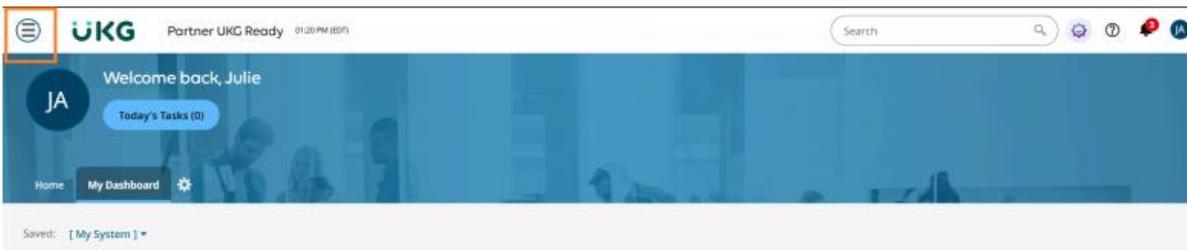
Modules - Imports				
Applications				
Demographic Custom Fields				
Employee Country Specific Fields				
Employees				
HR Custom Fields				
Modules - REST API Resources				
Applications		View	Edit	Add
		Yes	Yes	Delete
Job Application		Yes	Yes	(See All Applicants)
OAuth Applications		Yes	Yes	Yes
Reports - Reports				
Custom Filter				
Export Reports				(CSV/Text)
Print Reports				
Report Sharing User Selection				
Reports - Employee Information Reports				
All Forms				
All HR Action Requests				
Employee Information (Labels)				
Employee Information (Printing)				
Reports - System Reports				
Custom Report Settings				
Employee Self Service - Employee Access				
Employee Contacts		Permission	Add	Delete
Extra Fields		View		
		View		
Employee Self Service - Employee Assigned Custom Form Items				
	No Custom Forms Defined			
Employee Self Service - Employee Initiated HR Actions				
	No HR Actions Defined			
Employee Self Service - Employee Inventory Items				
	No Inventory Profiles Defined			

## General Settings: Security Profiles (3 of 3)

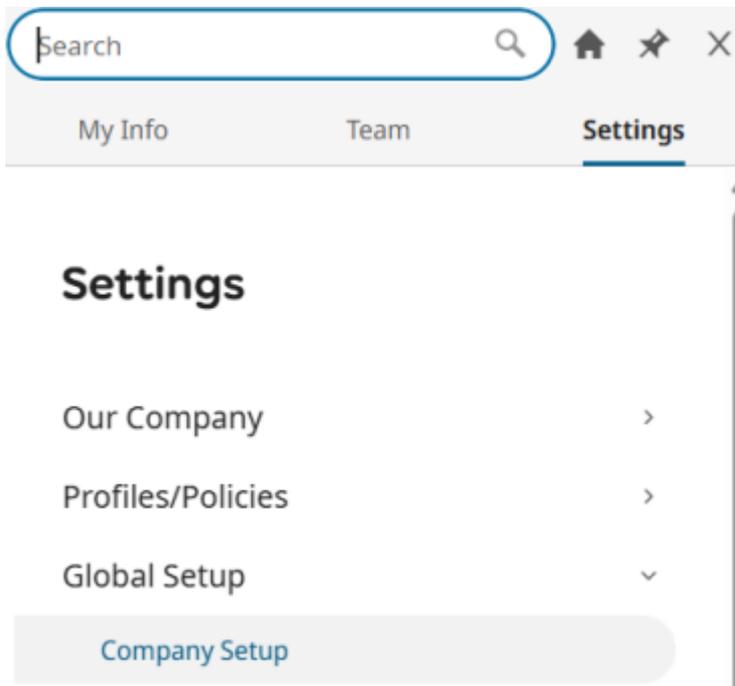
Employee Self Service - Menu			
Show Favorites in Main Menu			
Solutions Exchange - Links			
Applicant - Applicant			
Demographics		Permission	Add
Demographics Custom Values		View	Delete
		View	
Applicant - My Custom Form Items			
	No Custom Forms Defined		
Dashboards - Module Dashboards			
HR			
Recruitment			
Dashboards - Personal Settings			
My Information Preferences			

## Integration Configuration-OAuth Configuration

1. Login to UKG Ready

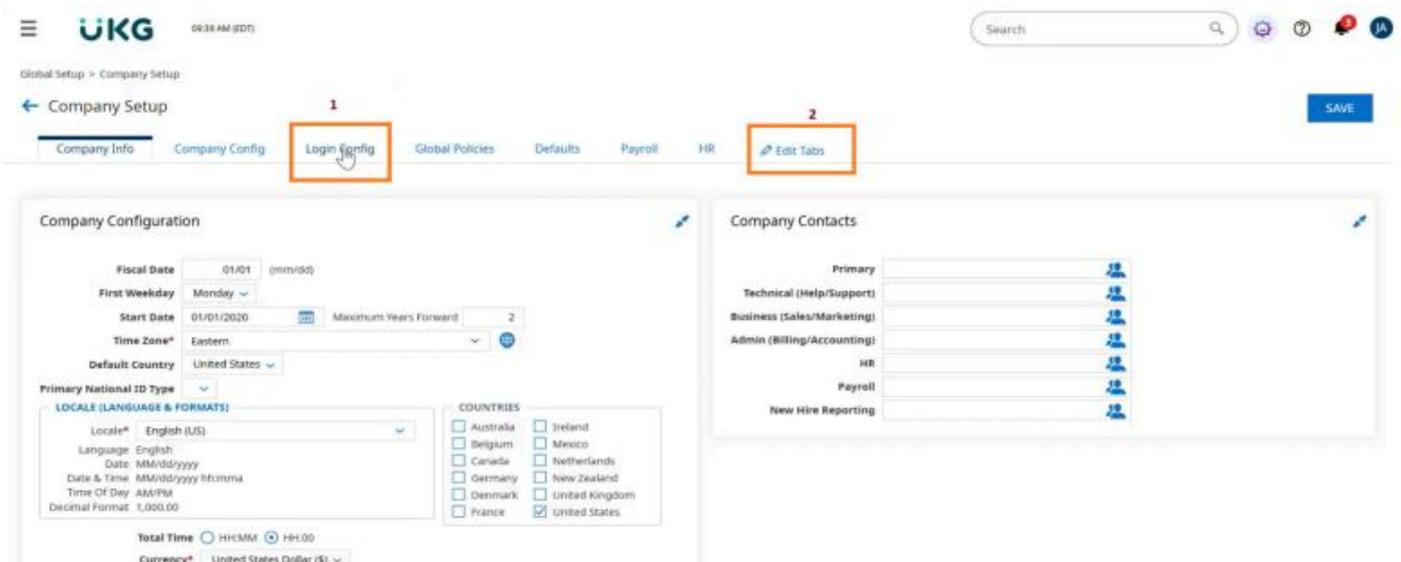


2. Click on the **Settings** tab, Under **Global Setup**, select **Company Setup**

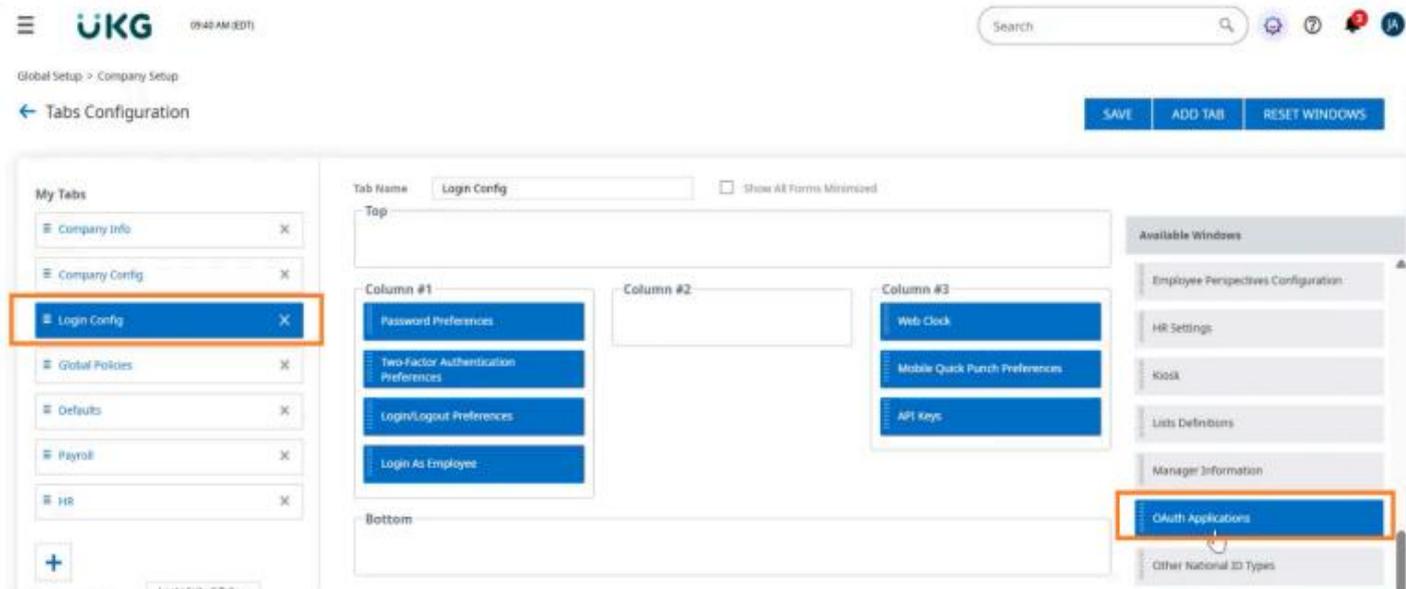


3. Click on **Login Config**

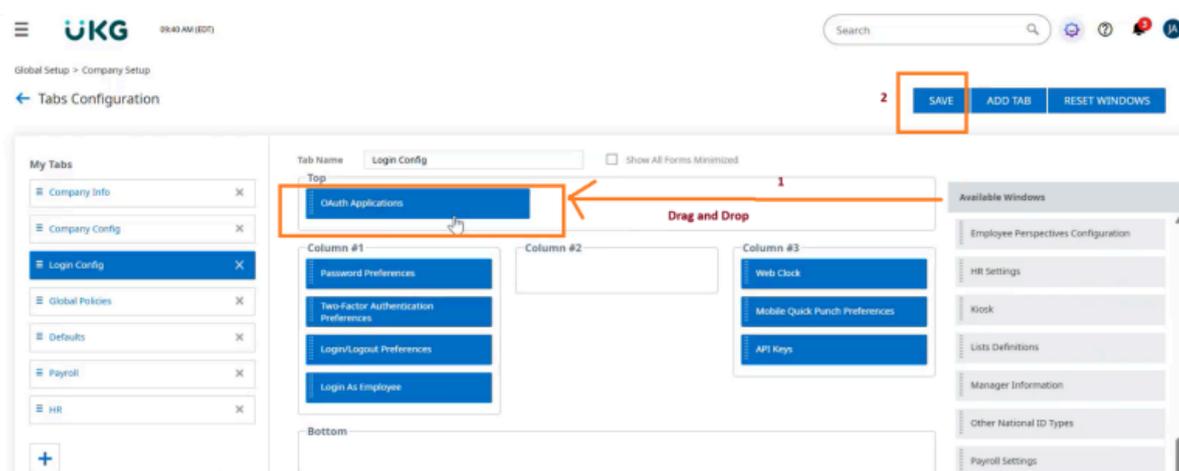
**NOTE: Sometimes expected options (OAuth Applications) are not always by default visible as available options within Login Config window can vary slightly from customer to customer, in that case Click on Edit tabs option**



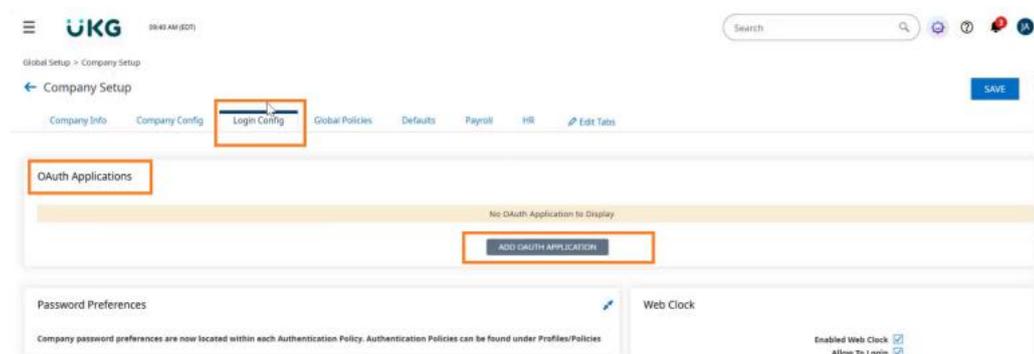
4. Within the **Edit Tabs** window, make sure **Login Config** option within **My Tabs** section to the left is highlighted and within Available Windows section, scroll down until you find OAuth Applications



5. Drag and Drop OAuth Application from Available Windows within the section with title as **Top** and Click **Save**.



6. Go back to the Login Config tab, and you should see OAuth Applications window



7. Do the below OAuth configurations and click **Save**.  
**NOTE: Make sure to take backup of generated secret within (notepad) as value won't be visible again.**

**Add OAuth Application**

Name\* DISA-OAuth **Provide a meaningful name**

Application Type\* Machine to Machine **DEFAULT option keep it as is**

Client Id\* b940727d-047f-443c-a750-3fce80e9a7c9 **Auto generated**

Secret\* xM7L\_uigb5ZxYnfNwM7CfzS1m **GENERATE SECRET**

Security Profile\* Company Administrator **Click on GENERATE SECRET to get value. NOTE: On clicking again it will override existing value (if any)**

ACCOUNT ACCESS

Account Groups\* 1 selected

**When selected it means integration can select all users on the Sandbox**

**As its a Dev instance so Admin Security profile is selected, but for Prod, a separate Security Profile will be created which would have access to only necessary endpoints**

Close Save

**NOTE:**

- For the integration to function smoothly, please keep the Name of the OAuth same as what is in the above screenshot (DISA-OAuth)
- “Security Profile” & “Account Groups” setting in Prod for the client will be done by the client and UKG Ready team depending on the groups and profile they create within their instance. But in general Profiles should have access to UKG Ready endpoints called by the integration.

8. Within the **Login Config window** you should see the newly created Oauth configuration. Click **Save**.

Global Setup > Company Setup

← Company Setup

SAVE

Company Info Company Config **Login Config** Global Policies Defaults Payroll HR Edit Tabs

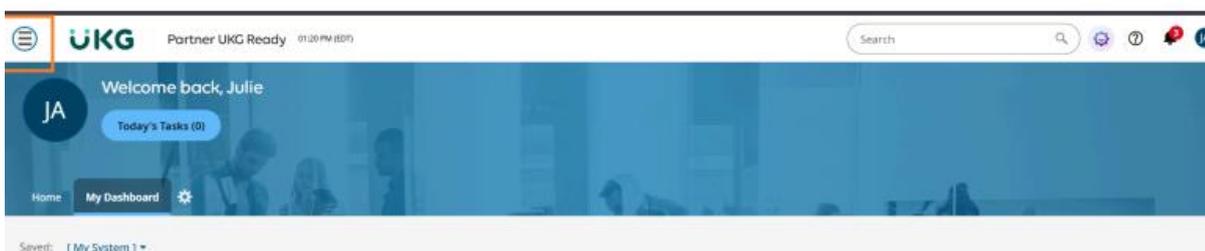
OAuth Applications

	NAME	APPLICATION TYPE	CLIENT ID
	DISA-OAuth	Machine to Machine	b940727d-047f-443c-a750-3fce80e9a7c9
	DISA-OAuth	Machine to Machine	0fe1e216-5d45-4629-bbcc-19c235145729
	DISA-OAuth_custom1	Machine to Machine	88c9c9d0-d942-49a4-8472-fe7a01ac99e0

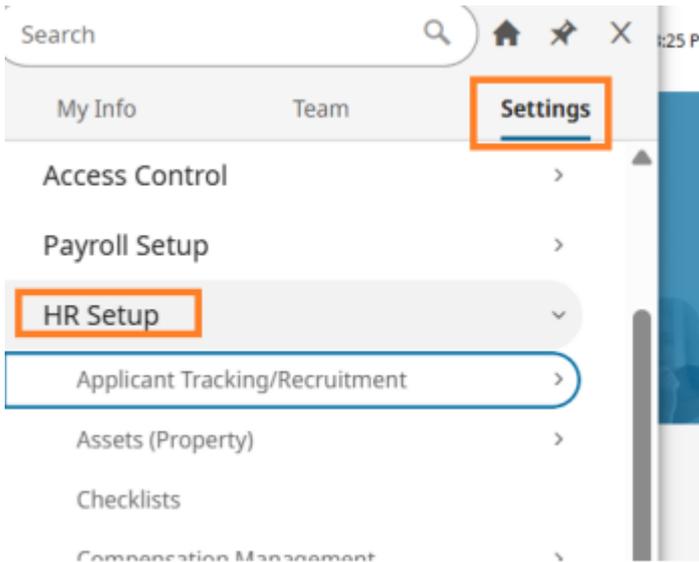
ADD OAUTH APPLICATION

## Create Custom Hiring Stages

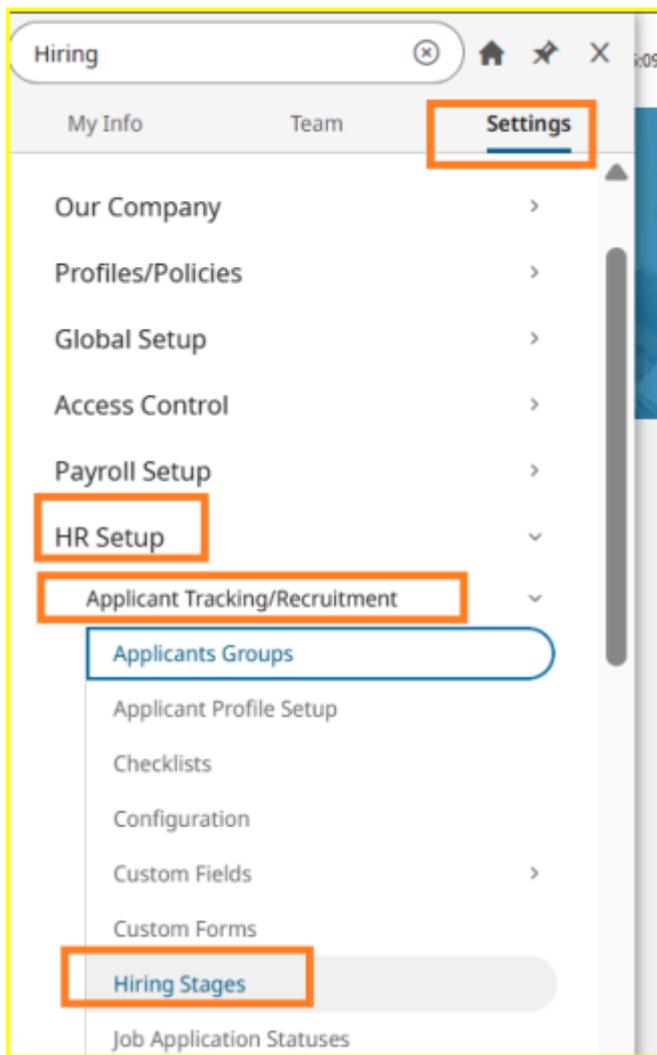
1. Navigate to the Home Page and click on the “Menu”.



2. In the menu, Select the “Settings” tab then click the “HR Setup” tab.



3. Under the “HR Setup” section, click on “Applicant Tracking/Recruitment” > Hiring Stages



4. Click on **Add New**>> Add 1st custom hiring stage, with name as “Background Check Requested” and click **Save**.

← Job Application Hiring Stage SAVE

Warnings (1) [Hide All](#)

Changes made to the Global Hiring Stage configuration will affect all Job Requisition Templates (except the sort order) and only new Job Requisitions. Existing Job Requisitions will remain intact.

Job Application Hiring Stage

Stage Name\* Background Check Requested

Stage Name (As Shown To Applicants) Background Check Requested

Sort Order 0

Workflow ▼

5. Add 2nd custom hiring stage, with name as **“Background Check Completed”** and click **Save**

HR Setup > Applicant Tracking/Recruitment > Hiring Stages

← Job Application Hiring Stage SAVE

Warnings (1) [Hide All](#)

Changes made to the Global Hiring Stage configuration will affect all Job Requisition Templates (except the sort order) and only new Job Requisitions. Existing Job Requisitions will remain intact.

Job Application Hiring Stage

Stage Name\* Background Check Completed

Stage Name (As Shown To Applicants) Background Check Completed

Sort Order 11

Workflow ▼

6. Add 3rd custom hiring stage, with name as **“Background Check Failed”** and click **Save**

HR Setup > Applicant Tracking/Recruitment > Hiring Stages

← Job Application Hiring Stage SAVE

Warnings (1) [Hide All](#)

Changes made to the Global Hiring Stage configuration will affect all Job Requisition Templates (except the sort order) and only new Job Requisitions. Existing Job Requisitions will remain intact.

Job Application Hiring Stage

Stage Name\* Background Check Failed

Stage Name (As Shown To Applicants) Background Check Failed

Sort Order 10

Workflow ▼

7. Final View

HR Setup > Applicant Tracking/Recruitment > Hiring Stages

← Hiring Stages

Rows On Page 20 13 Rows [Refresh Data](#) Full Screen [Default] Settings

	Sort Order	Stage Name	Stage Name (As Shown To Applicants)
<a href="#">✎</a> X	1	Resume Received	
<a href="#">✎</a> X	2	Screen Candidate	
<a href="#">✎</a> X	3	Interview Candidate	
<a href="#">✎</a> X	4	Candidate Not A Fit	
<a href="#">✎</a> X	5	Extend Offer	
<a href="#">✎</a> X	6	Offer Declined	
<a href="#">✎</a> X	7	Offer Accepted	
<a href="#">✎</a> X	8	Perform Background Checks	
<a href="#">✎</a> X	9	Background Check Requested	Background Check Requested
<a href="#">✎</a> X	10	Background Check Failed	Background Check Failed
<a href="#">✎</a> X	11	Background Check Completed	Background Check Completed
<a href="#">✎</a> X	12	Onboarding	
<a href="#">✎</a> X	13	Hired	

**NOTE:** Sort Order may vary depending on what other stages customer sees in their instance. But in general its better to keep the above 3 stages in sequence.

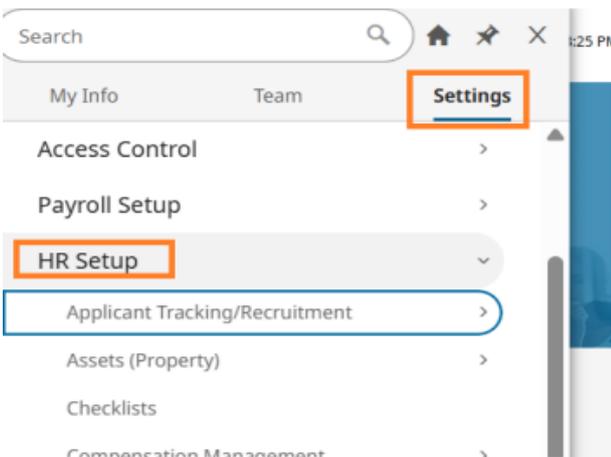
# Create Custom Field

## Job Requisition Level

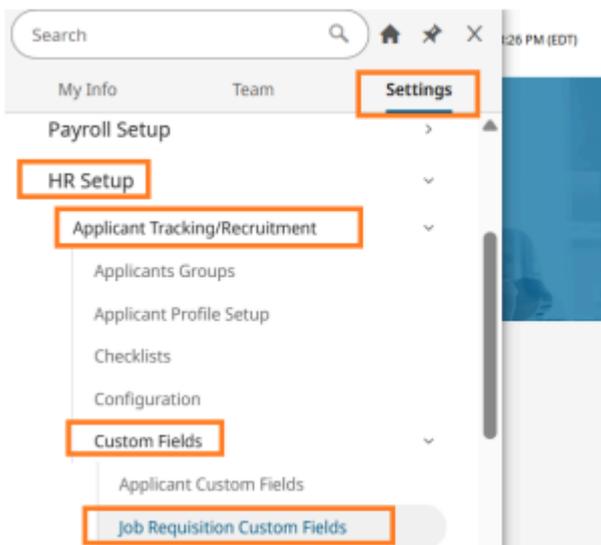
1. Navigate to the Home Page and click on the “Menu”



2. In the menu, Select the “Settings” tab then click the “HR Setup” tab.



3. Under the “HR Setup” section, click on “Applicant Tracking/Recruitment” > Custom Fields > Job Requisition Custom Fields

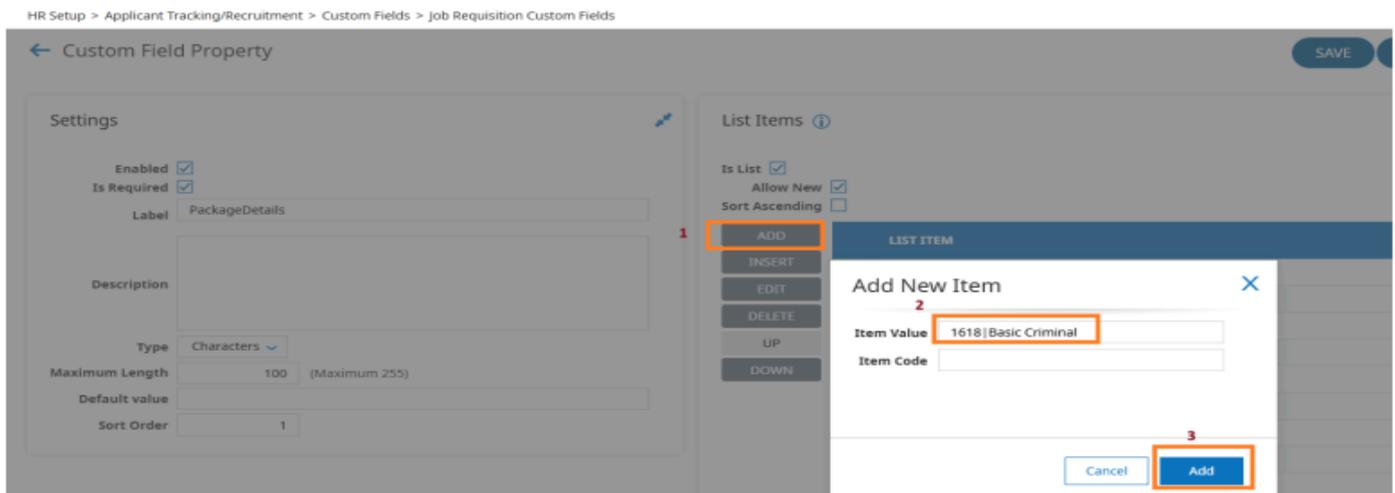


4. On the “Job Requisition Custom Fields” page, click “Add New Field”.

### Custom field 1:

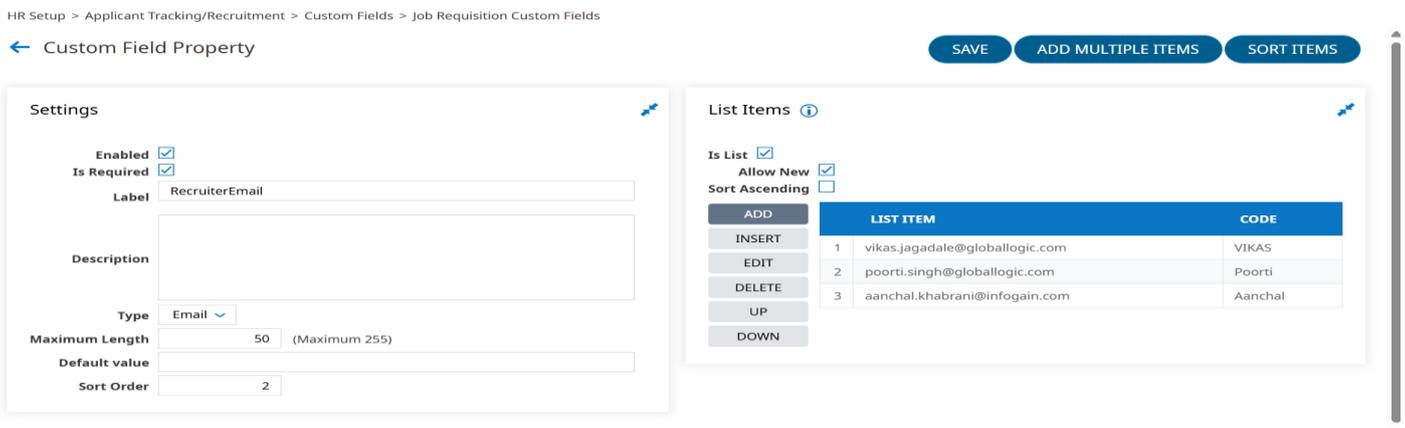
- Enter the field name(Label) as **PackageDetails**
- Make sure to check the Enabled & Required option

- Change the “**Maximum Length**” field from 10 to 100 to ensure the entire PackageDetails are stored.
- Sort Order is 1 if its not already 1
- Within List Items Section, Check “**is List**” & “**Allow New**”
- Click on **Add** button, And in the Item Value enter the Package Details
- Click **Save** Button.
  - NOTE: Packages Format within the Item Value Should be PACKAGE ID|Package Name i.e. Package ID and package names are separated by the | symbol.**
  - For Example: Package ID = 1618 Package Name = Basic Criminal Then User need to provide Item Value as 1618|Basic Criminal**
- Add all the required packages and once done, Click **Save**



### Custom Field2:

- Repeat Step 1 to 4, 2. Enter the field name(Label) as **RecruiterEmail**
- Make sure to check the Enabled & Required option
- Change the “Maximum Length” field from 10 to 50 to ensure the entire emailid is stored.
- Sort Order is 2 if its not already 2
- Within List Items Section, Check “is List” & “Allow New”
- Click on Add button, And in the Item Value enter the Recruiter Email.



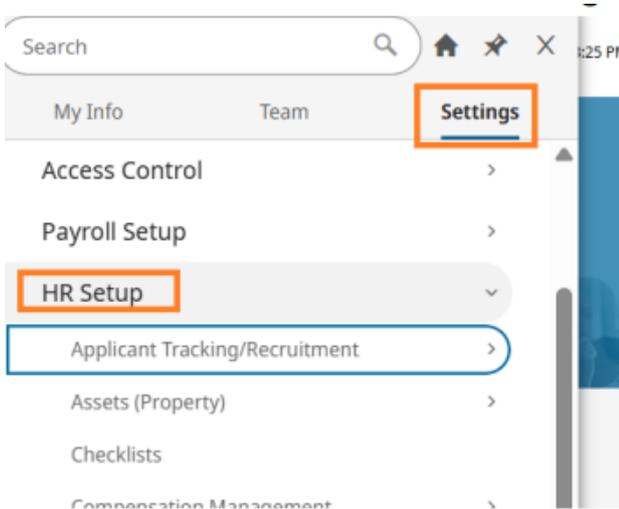
**NOTE: For the integration to function properly it is expected to add at least 1 recruiter email.**

### Applicant Level

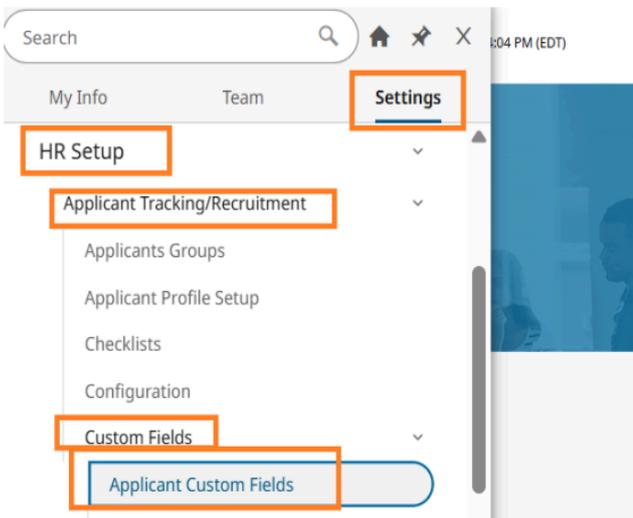
1. Navigate to the Home Page and click on the “Menu”.



2. In the menu, Select the “Settings” tab then click the “HR Setup” tab.



3. Under the “HR Setup” section, click on “Applicant Tracking/Recruitment” > Custom Fields > Applicant Custom Fields



4. On the “Applicant Custom Fields” page, click “Add New Field”.

HR Setup > Applicant Tracking/Recruitment > Custom Fields > Applicant Custom Fields  
← Applicant Custom Field Definitions



#### Custom Field 1:

- Set Label as **Applicant\_Order\_RESULT**
- Make sure to check the Enabled option
- Do not check the Required option

- Applicant Profile Tab is **“Don’t Display to Applicant”**
- Type is **Character**
- Sort Order is 1 if its not already 1
- Click **Save**

HR Setup > Applicant Tracking/Recruitment > Custom Fields > Applicant Custom Fields

← Custom Field Property SAVE ADD MULTIPLE ITEMS SORT ITEMS

**Settings**

Enabled  Applicant Profile Tab Don't Display To Applicant

Is Required

Include on Quick Apply

Label Applicant\_Order\_RESULT (Maximum 255)

Label Width 0 Label Height 0

Description

Type Characters

Maximum Length 500 (Maximum 4000)

Default value

Sort Order 1

List Items

### Custom Field2:

- Repeat Step 1 to 4
- Set Label as **Applicant\_Order\_URL**
- Make sure to check the **Enabled** option
- Do not check the Required option
- Applicant Profile Tab is **“Don’t Display to applicant”**
- Type is **Link**
- Sort Order is 2 if its not already 2
- Click **Save**

HR Setup > Applicant Tracking/Recruitment > Custom Fields > Applicant Custom Fields

← Custom Field Property SAVE ADD MULTIPLE ITEMS SORT ITEMS

Enabled  Applicant Profile Tab Don't Display To Applicant

Is Required

Include on Quick Apply

Label Applicant\_Order\_URL (Maximum 255)

Label Width 0 Label Height 0

Description

Type Link

Maximum Length 500 (Maximum 4000)

Default value

Sort Order 2

Email Tag Name APPLICANT\_CUSTOM\_FIELD\_2

List Items

### Custom Field3:

- Repeat Step 1 to 4
- Set Label as **Applicant\_Adjudication**
- Make sure to check the **Enabled** option
- Do not check the **Required** option
- Applicant Profile Tab is **“Don’t Display to applicant”**

- Type is **Character**
- Sort Order is 3 if its not already 3
- Click **Save**

HR Setup > Applicant Tracking/Recruitment > Custom Fields > Applicant Custom Fields

← Custom Field Property

SAVE ADD MULTIPLE ITEMS SORT ITEMS

Enabled  Applicant Profile Tab Don't Display To Applicant

Is Required

Include on Quick Apply

Label Applicant\_Order\_URL (Maximum 255)

Label Width 0 Label Height 0

Description

Type Link

Maximum Length 500 (Maximum 4000)

Default value

Sort Order 2

Email Tag Name APPLICANT\_CUSTOM\_FIELD\_2

