



## For Migrating Clients

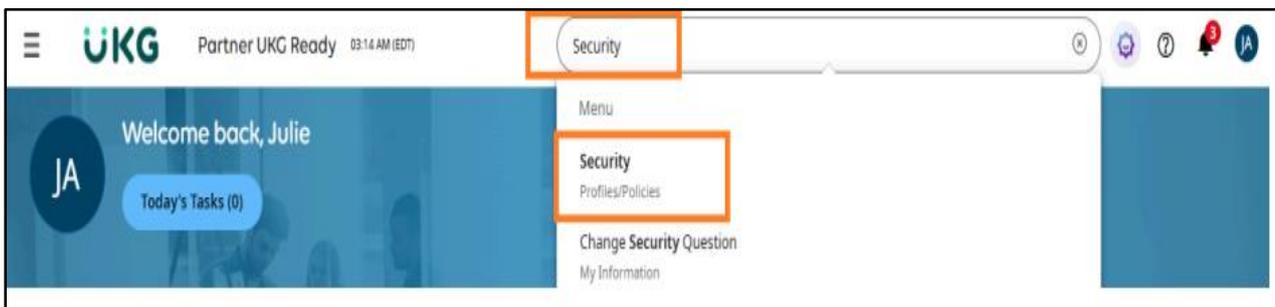
DISAScreen + UKG Ready integrations require the following steps to complete the configuration within the application. DISA is providing this activation guide to walk you through each of these steps. Please note that DISA will need details from the set up to complete the integration connection. [CLICK HERE](#) for details on what we need to receive and how to submit it.

1. OAuth Profile Setup
2. Integration Configuration-OAuth Configuration
3. Creating Custom Hiring Stages
4. Creating Custom Fields
5. Updating Job Requisition Locations

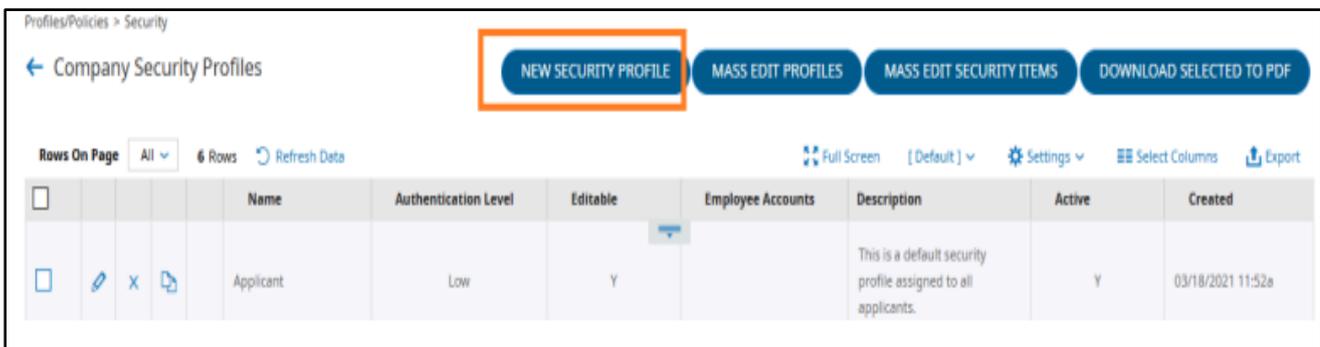
**NOTE – If you have an existing integration with UKG Ready, you will not be able to edit it. You will need to create a NEW company set up.**

## STEP 1: 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. Fill in the details and check the options as shown below in the sample for your account to limit the API access to only limited (required) API services. 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	Delete
HR Settings	Yes	Yes	Yes	Yes
Lists Definitions	Yes	Yes	Yes	Yes
Global - Global Setup				
Cost Center Definitions	View	Edit	Add	Delete
Cost Center Trees	Yes	Yes	Yes	Yes
Jobs	Yes	Yes	Yes	Yes
OAuth Applications	Yes	Yes	Yes	Yes
Global - Look & Feel				
System				
Global - Object Lists				
Cost Centers	View	Edit	Add	Delete
Jobs	Yes	Yes	Yes	Yes
Security Profiles	Yes	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	Add Delete
Yes	Yes	Yes	Yes
Payroll - Tax Edit Option			
Permission			
HR - Compensation Management			
Permission	Add	Delete	
HR - Employee Inventory Items			
No Inventory Profiles Defined			
HR - Employee Management			
Permission	Add	Delete	
Employee Information (My Team)	View		
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	View	Yes	
HR - Employee Related Functions			
Change Password			
Clear Employees Auth App Registration	(All Company Employees)		
Unlink Employee Account			

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

HR - HR Tables				
Custom Fields	View	Edit	Add	Delete
HR Action	Yes	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	Add	Delete	
	View/Edit			
HR - Rates				
Permission	Add	Delete		
HR - Recruitment				
Permission	Add	Delete		
All Forms Report	View			
Applicant Groups	View			
Applicant Profile Configuration	View			
Applicants	View/Edit	Yes	Yes	(See All Applicants)
Configuration	View/Edit			
Hiring Stages Configuration	View/Edit	Yes	Yes	
Job Application Statuses	View/Edit	Yes	Yes	
Job Applications	View/Edit	Yes	Yes	(See All Job Applications)
Job Requisition Custom Fields Definitions	View/Edit	Yes	Yes	(Mass Edit)
Job Requisition Custom Values	View/Edit			
Job Requisition Hiring Stages	View/Edit			
Job Requisition Workflow	View/Edit			
Job Requisitions	View/Edit	Yes	Yes	(See All Job Requisitions)
		(Close/Re-Open Job Requisitions)		
		(Edit Submitted/Approved)		
Use Job Board	View/Edit			
HR - Succession Planning				
Permission	Add	Delete		

Modules - Imports				
Applicants				
Demographic Custom Fields	View			
Employee Country Specific Fields	View			
Employees	View/Edit			
HR Custom Fields	View			
Modules - REST API Resources				
Applicants	View	Edit	Add	Delete
Job Application	Yes	Yes	(See All Applicants)	
OAuth Applications	Yes	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				
Permission	Add	Delete		
Employee Contacts	View			
Extra Fields	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				

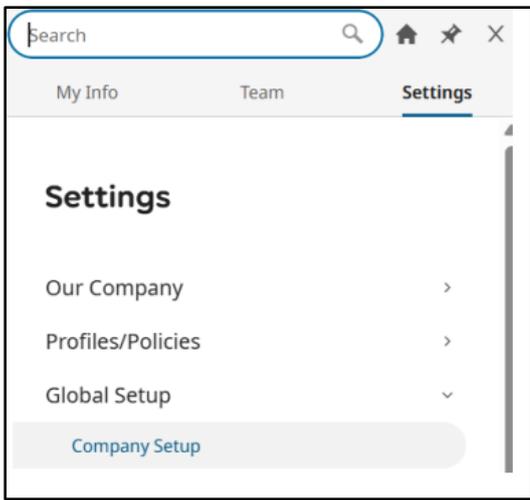
## General Settings: Security Profiles (3 of 3)

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

# STEP 2: Integration Configuration-OAuth Configuration

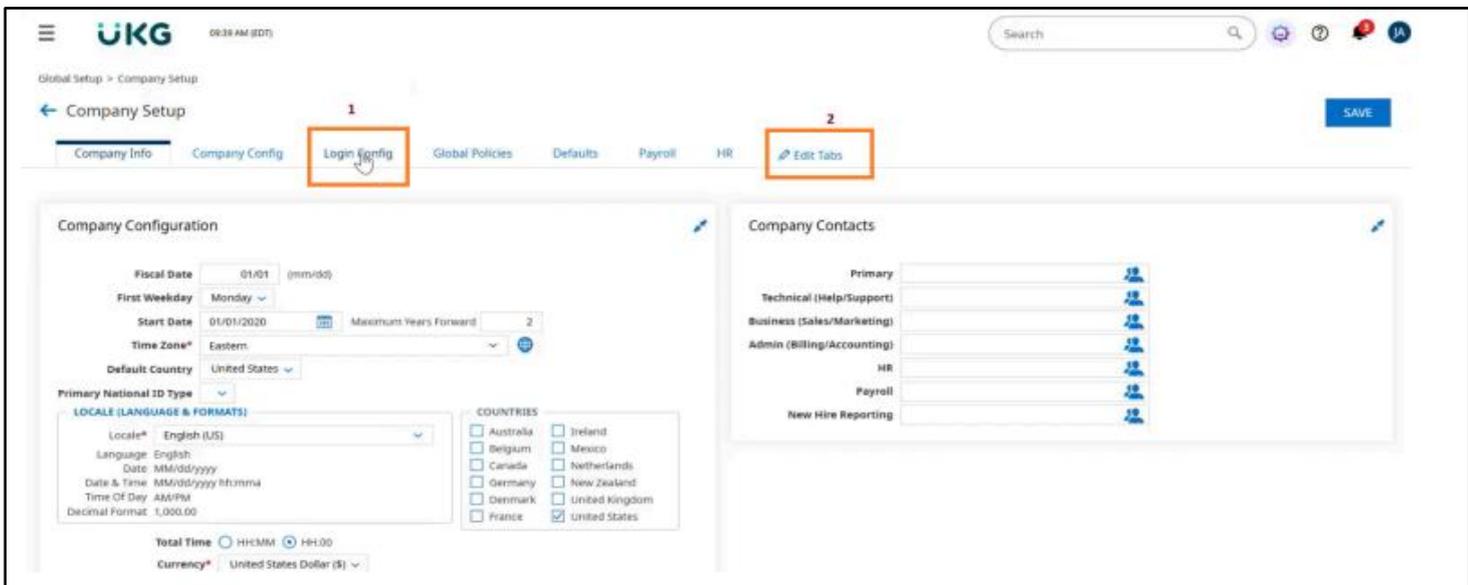
1. Login to UKG Ready. Click on the **Settings** tab, Under **Global Setup**, select **Company Setup**.



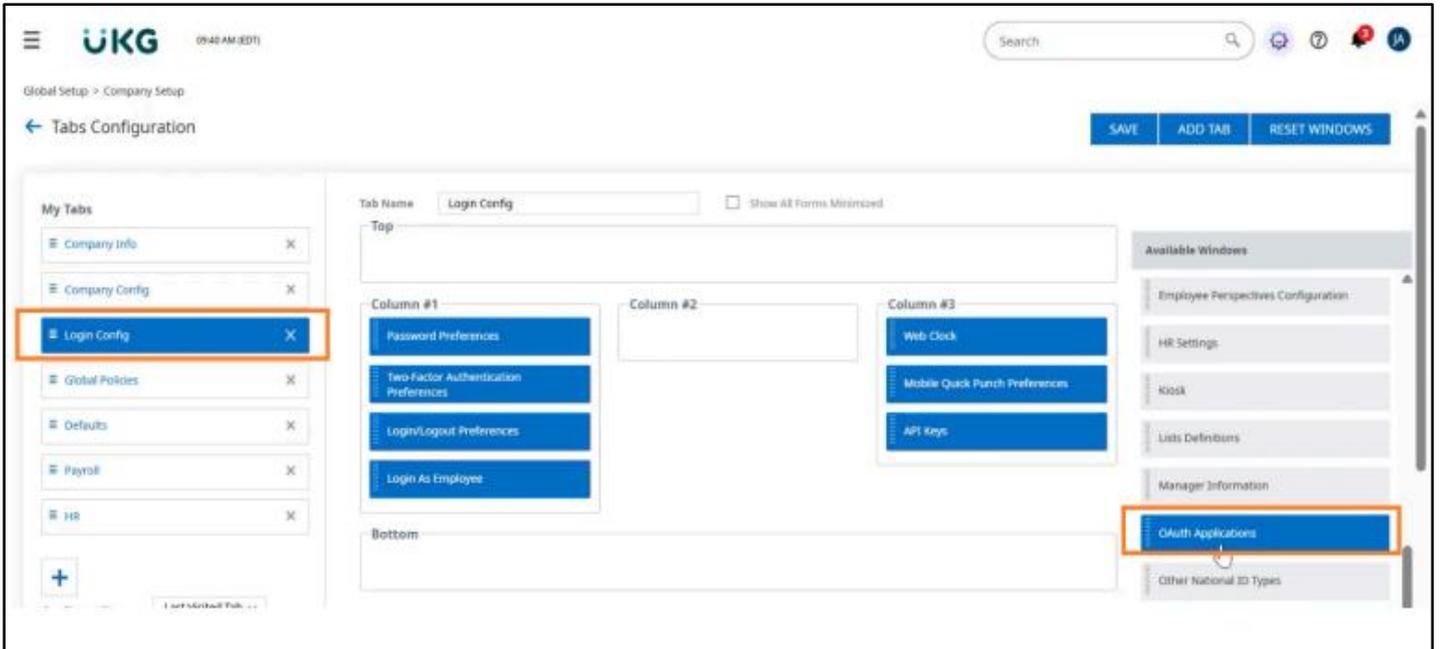


2. Click on **Login Config**.

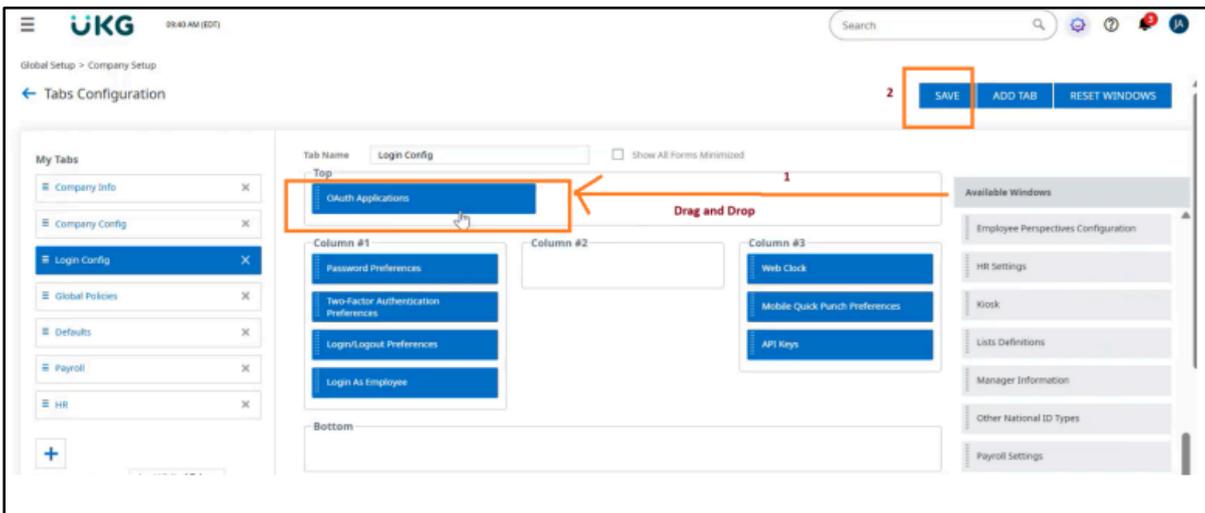
**TIP:** Sometimes expected options (OAuth Applications) are not always visible as available options within Login Config window. This can vary slightly from customer to customer. If it is not visible, Click on Edit tabs option.



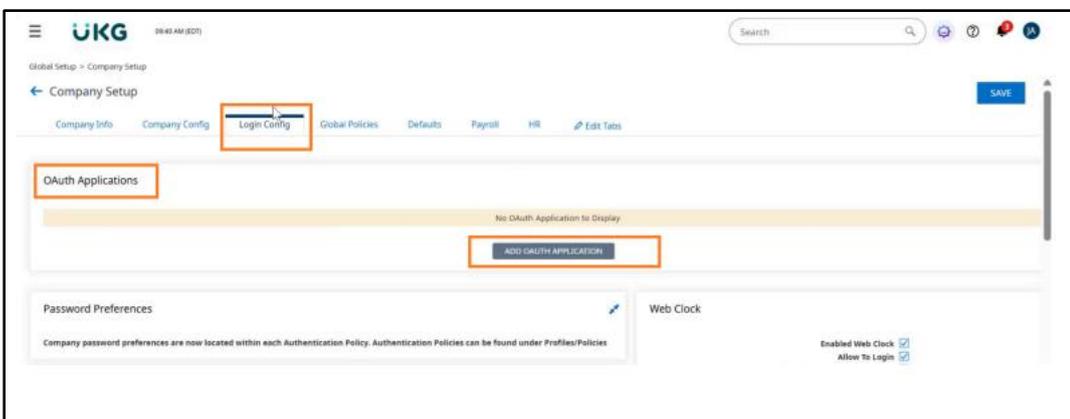
3. Within the **Edit Tabs** window, make sure **Login Config** option within **My Tabs** section to the left is highlighted and within Available Windows section, scroll down until you find OAuth Applications.



4. Drag and Drop **OAuth Application** from the Available Windows on the right over to **Top** and Click **Save**.



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



6. Add the below OAuth configurations and click **Save**.

- TIP:**
- For the integration to function smoothly, please keep the Name of the OAuth same as what is in the above screenshot (DISA-OAuth).
  - The generated secret will not remain visible. We suggest making a copy/paste of this value to save and send to DISA.

7. Within the **Login Config** window, you should now 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
<a href="#">Edit</a> <a href="#">Lock</a>	DISA-OAuth	Machine to Machine	b940727d-047f-443c-a750-3fce80e9a7c9
<a href="#">Edit</a> <a href="#">Lock</a>	DISA-OAuth	Machine to Machine	0fe1e216-5d45-4629-bbcc-19c235145729
<a href="#">Edit</a> <a href="#">Lock</a>	DISA-OAuth_custom1	Machine to Machine	88c9c9d0-d942-49a4-8472-fe7a01ac99e0

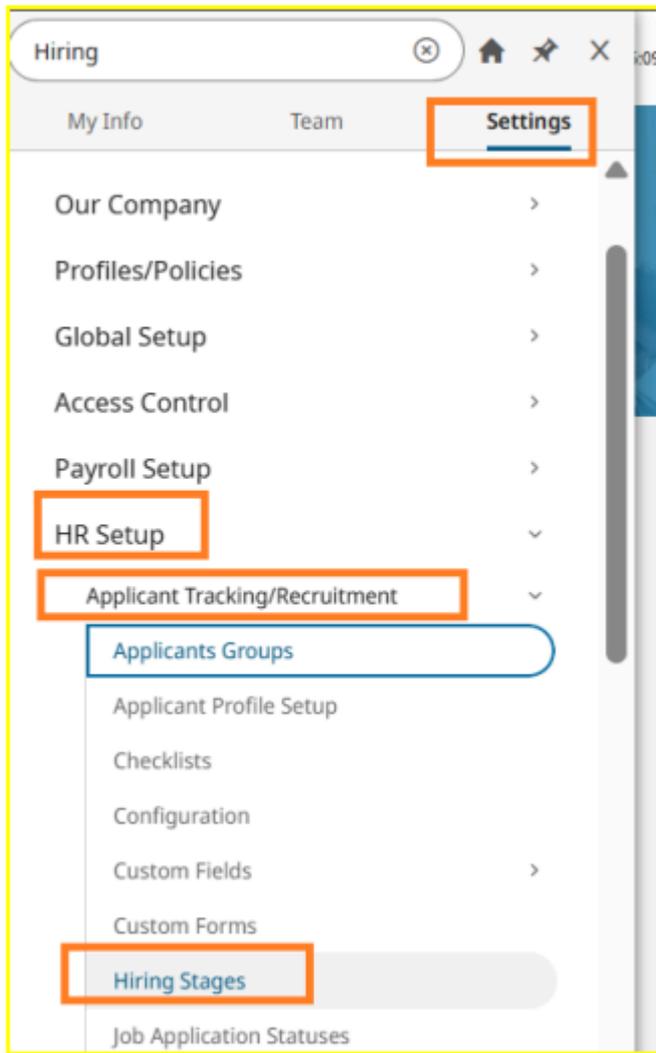
**ADD OAUTH APPLICATION**

### STEP 3: Create Custom Hiring Stages

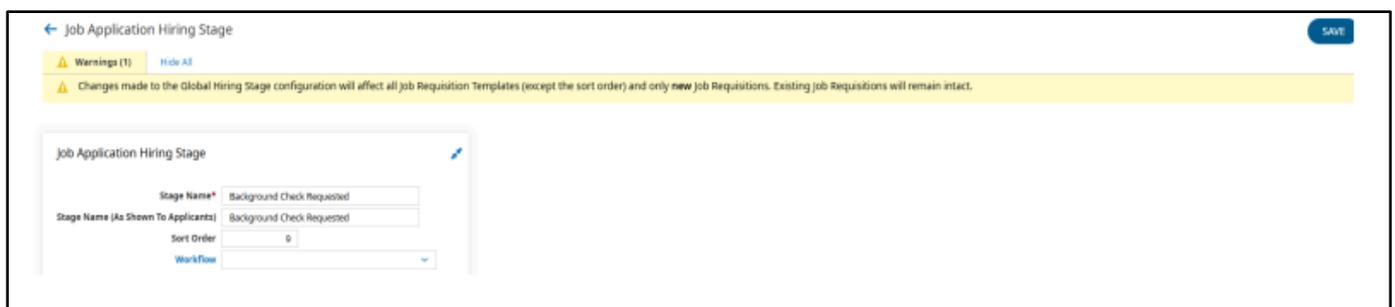
1. Navigate to the Home Page and click on the “Menu”.



2. In the menu, Select the “Settings” >> “HR Setup” tab. Click on “Applicant Tracking/Recruitment” and then “Hiring Stages”.



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



4. Add 2nd custom hiring stage, with the name “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\*

Stage Name (As Shown To Applicants)

Sort Order

Workflow

5. Add 3rd custom hiring stage, with the name **“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\*

Stage Name (As Shown To Applicants)

Sort Order

Workflow

6. You should now see the 3 new custom Hiring Stages.

**TIP:** Sort Order may vary depending on what other stages are in your instance. But in general, it’s better to keep the new 3 stages in sequence.

HR Setup > Applicant Tracking/Recruitment > Hiring Stages

← Hiring Stages

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

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

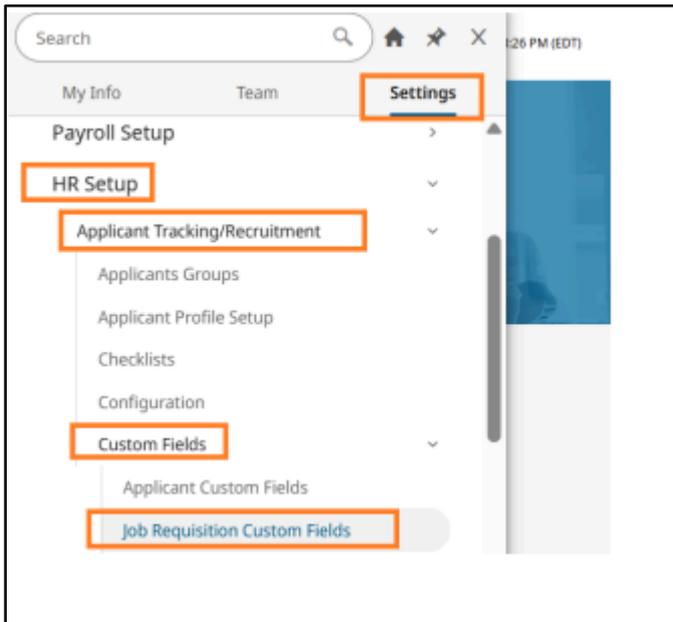
## STEP 4: Create Custom Field

### Job Requisition Level Fields

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



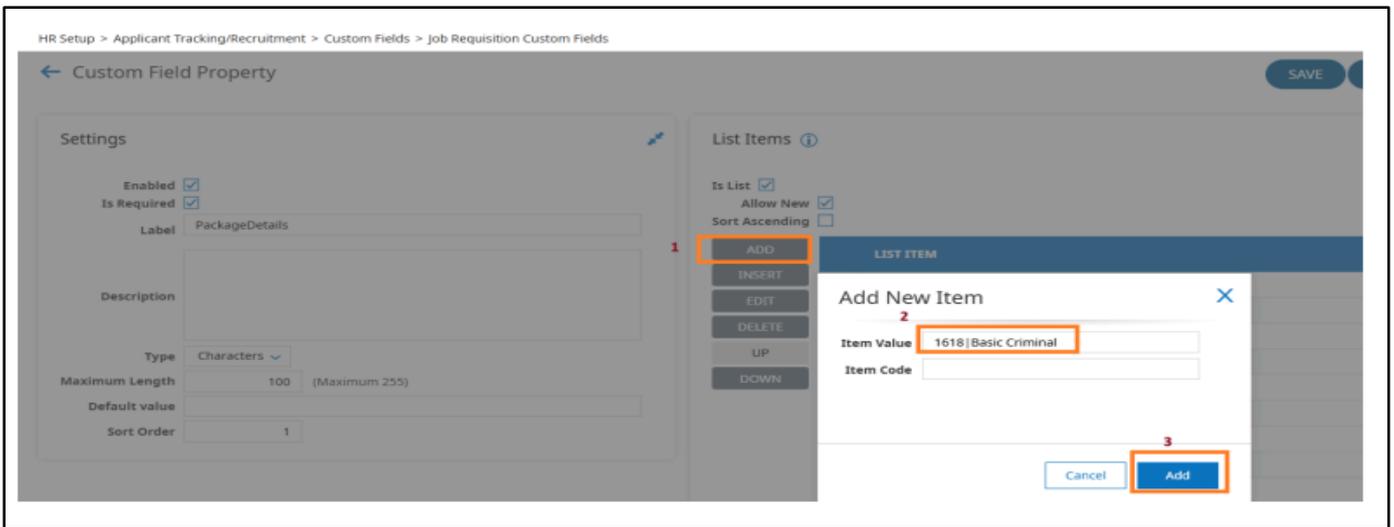
2. In the menu, Select the “**Settings**” tab and then click “**HR Setup**”. Under the “**HR Setup**” section, click on “**Applicant Tracking/Recruitment**” > **Custom Fields** > **Job Requisition Custom Fields**.



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

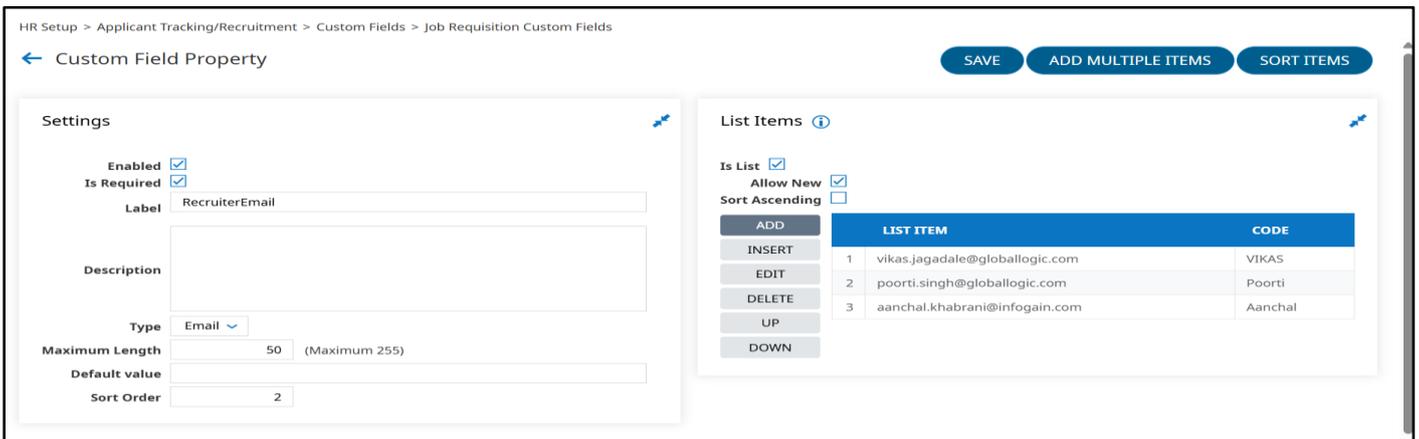
**Custom field 1:**

- 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.
- If not already set, ensure Sort Order is 1.
- Within List Items Section, Check “**is List**” & “**Allow New**”
- Click on **Add** button, and in the Item Value enter the Package Details
  - **TIP:** 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:** If the Package ID = 1618 and the Package Name = Basic Criminal then the Item Value would be entered as “1618|Basic Criminal”.
- Repeat to add all the required packages and click **Save**.



### Custom Field2:

- Set 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.
- If not already set, ensure Sort Order is 2.
- Within List Items Section, Check “is List” & “Allow New”
- Click on Add button, and in the Item Value enter the **Recruiter Email**.
- **TIP:** For the integration to function properly it is expected to add at least 1 recruiter email.

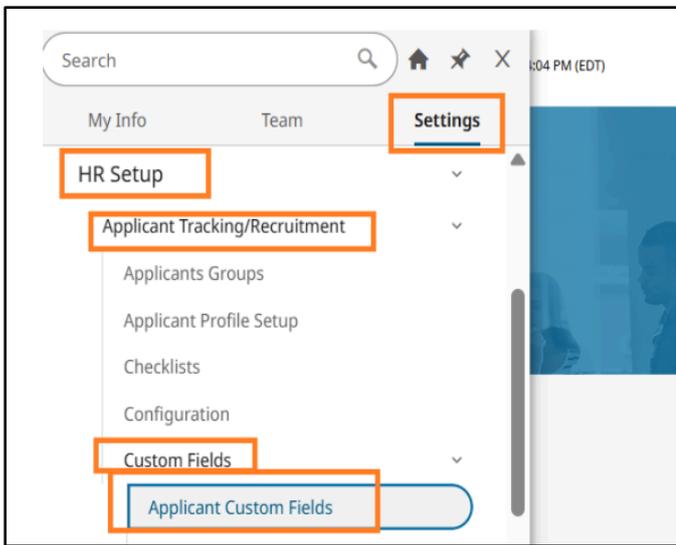


## Applicant Level Fields

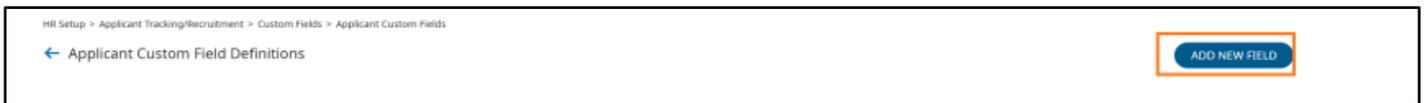
1. Navigate to the Home Page and click on the “Menu”.



2. In the menu, Select the “Settings” tab and then click “HR Setup”. Under the “HR Setup” section, click on “Applicant Tracking/Recruitment” > Custom Fields > Applicant Custom Fields.

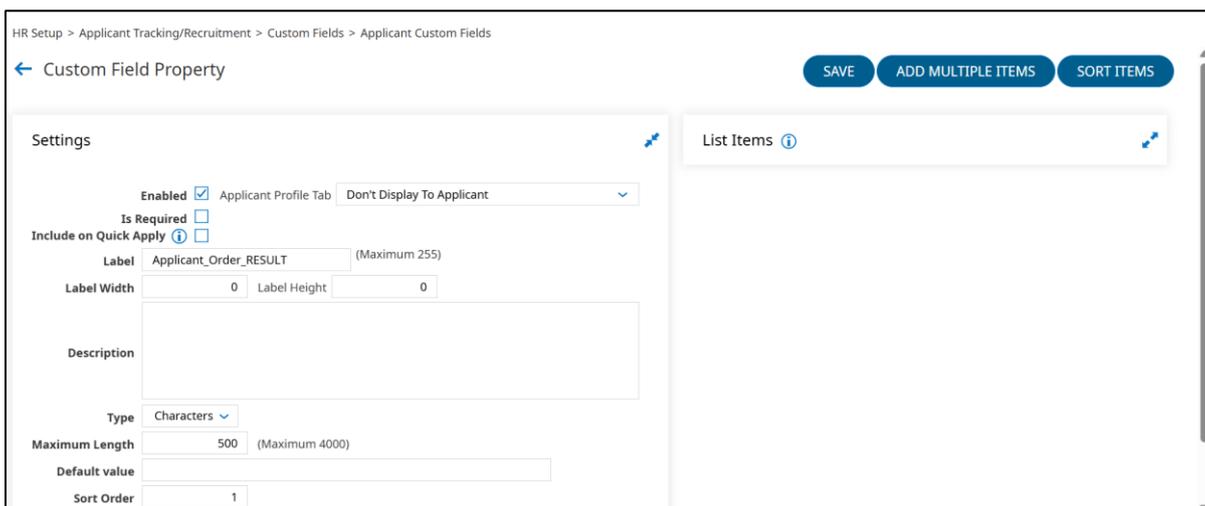


3. On the “**Applicant Custom Fields**” page, click “**Add New Field**”.



#### 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**.
- If not already set, ensure Sort Order is 1.
- Click **Save**.



#### Custom Field2:

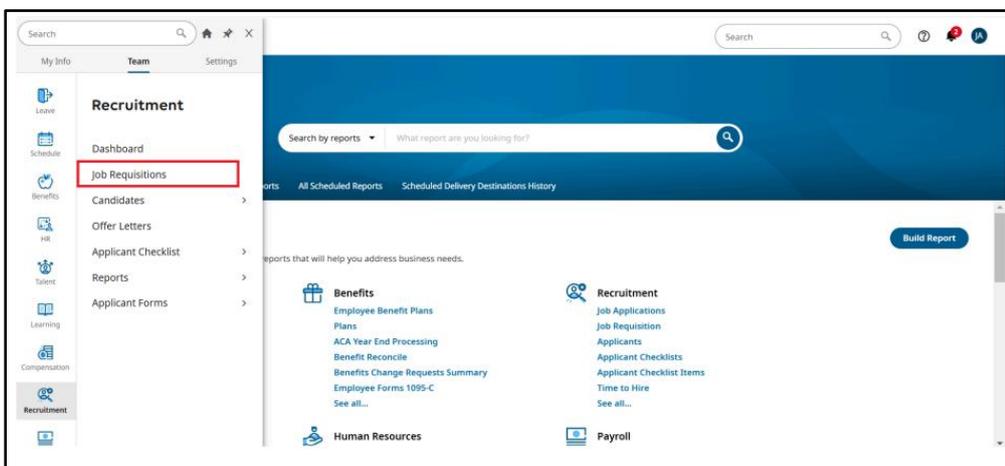
- Set Label as **Applicant\_Order\_URL**.
- Make sure to check the **Enabled** option.
- Do not check the Required option.
- Applicant Profile Tab is “**Don’t Display to applicant**”.
- Type is **Link**.
- If not already set, ensure Sort Order is 2.

- Click **Save**.

## STEP 5: Adding Locations & Packages to Jobs for Order Placement

Job requisitions will need to be configured to send Location Identifiers to route orders appropriately. This is especially important if your account hierarchy has sub accounts, or organizations, within DISAScreen. The below steps start with creating a new Job Requisition. To update Locations, jump to step 6.

1. Navigate to the Home Page and click on the “**Menu**”.
2. In the menu, Select the “**Team**” tab >> “**Recruitment**” tab.
3. Under the “**Recruitment**” section, click on “**Job Requisitions**”.



4. On the “**Job Requisitions**” page, click “**Add New**”.

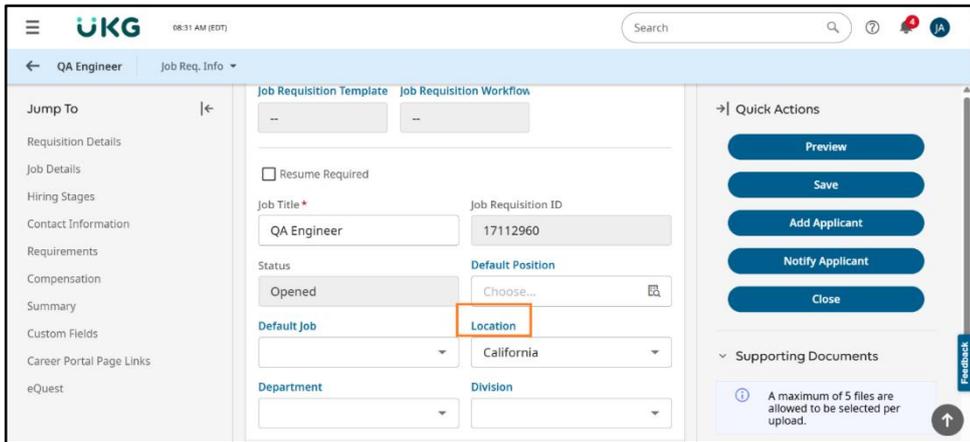
Active	Budgeted	Job Status	Requisition #	Location	Job Title	# Applicants	Job Category	Job Industry #1
Y		Opened	17110380	Miami, FL	Alliances Technical Lead	-	-	-

5. A new “**Job Requisition**” page will appear. Enter the details for fields highlighted below and click “**Save**”.

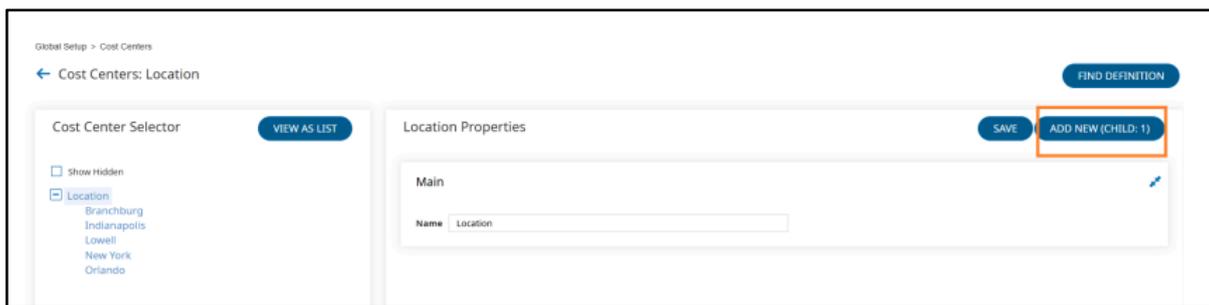
**TIP:** You can always fill more details as per business requirement, but highlighted fields are minimum requirement for the DISAScreen Integration.

6. Location Updates & Mapping: The Job Requisition must tag the location for order routing within DISAScreen.

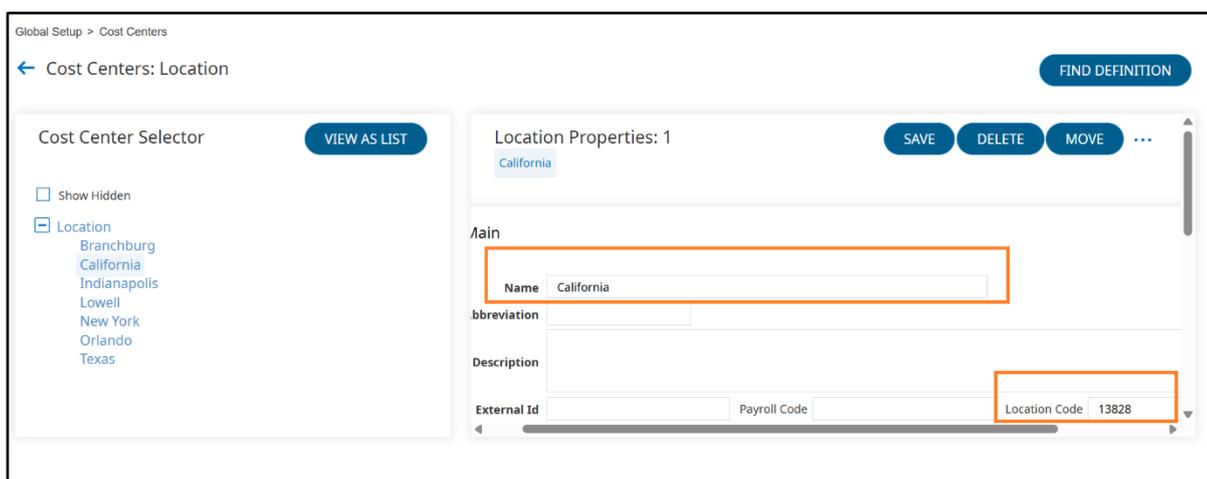
- Click on the “Location” Text.



- To modify or add new locations click on Edit Icon in front of Location and then **Add New Child** button.



- Enter the Location Name (in this case ‘California’) and the Location Code (i.e. DISAScreen Org ID - in this case it was entered as **13828**) Click **Save**.



- To add more Location’s repeat Step above.
- Confirm that the Job Requisition is tagged with the proper Location.

UKG 10:14 AM (EDT) Search

QA Engineer Job Req. Info

Job Requisition Template Job Requisition Workflow

Resume Required

Job Title \* QA Engineer Job Requisition ID 17112960 Status Opened Default Position Choose...

Default Job Location California Department Division

Status & Visibility

Visibility Date From mm/dd/yyyy Visibility Date To mm/dd/yyyy

Evergreen

Number Of Openings \* 5 Hired Applicants Count 0  Auto Change Status To Closed And Filled When Filled

Total FTE

- Location the two new Job Requisition custom fields for packages and Recruiter Email. Update according to the requirements.  
**TIP:** Remember, the email address in the Recruiter email field must match a user on the DISAScreen account for proper order placement.

QA Engineer Job Req. Info

Build with tinyMCE

Custom Fields Define Fields

PackageDetails \* 2410|DScreen Pkg - Gtwy 4  Display to Applicant

RecruiterEmail \* aanchal.khabrani@infogain.com  Display to Applicant

Career Portal Page Links

Copy any of the links below in order to embed a specific Job Requisition page into a website.

Show Job: