UKG Ready Activation Guide

For Migrating Clients

DISAScreen + UKG Ready integrations require the following steps to complete the configuration within the application. Please note that these updates are specific and detailed – pay close attention to the provided Tips. 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. New Company Set Up (aka Connecting an Additional OAuth Application)
3. Create Custom Hiring Stages
4. Create Custom Fields
5. Update Job Requisition with Package Details
6. Update Job Requisition with Mapped Locations (optional)

NOTE – You will not be able to edit the configurations for your existing UKG Ready Integration. You will need to follow Step 2 in this guide.

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

	View	Edit	Add	Delete
Cost Centers Configuration	Yes	Yes		
HR Settings	Yes	Yes		
Lists Definitions	Yes			

Global - Global Setup

	View	Edit	Add	Delete
Cost Center Definitions	Yes	Yes	Yes	Yes
Cost Center Trees	Yes	Yes		
Jobs	Yes	Yes	Yes	Yes
OAuth Applications	Yes	Yes	Yes	

Global - Look & Feel

System

Global - Object Lists

	View	Edit	Add	Delete
Cost Centers	Yes	Yes	Yes	
Jobs	Yes	Yes	Yes	
Security Profiles	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

	View	Edit	Add	Delete
Report Codes	Yes			

Payroll - Tax Edit Option

	Permission
Tax Edit Option	

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)
Unlock Employee Account

General Settings: Security Profiles (2 of 3)

HR - HR Tables

	View	Edit	Add	Delete
Custom Fields	Yes	Yes	Yes	
HR Action	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

	Permission	Add	Delete
Company Settings	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	
Job Applications	View/Edit	Yes (See All Job Applications) (Mass Edit)	
Job Requisition Custom Fields Definitions	View/Edit		Yes
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
Employee Country Specific Fields
Employees
HR Custom Fields

Modules - REST API Resources

	View	Edit	Add	Delete
Applicants	Yes	Yes (See All Applicants)		
Job Application	Yes	Yes		
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

	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

	Permission	Add	Delete
Demographics	View		
Demographics Custom Values	View		

Applicant - My Custom Form Items

No Custom Forms Defined

Dashboards - Module Dashboards

HR
Recruitment

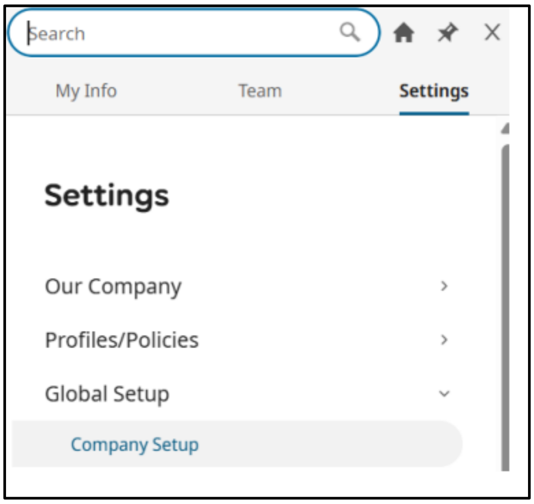
Dashboards - Personal Settings

My Information Preferences

CLICK HERE to view the Security Profiles in More Detail.

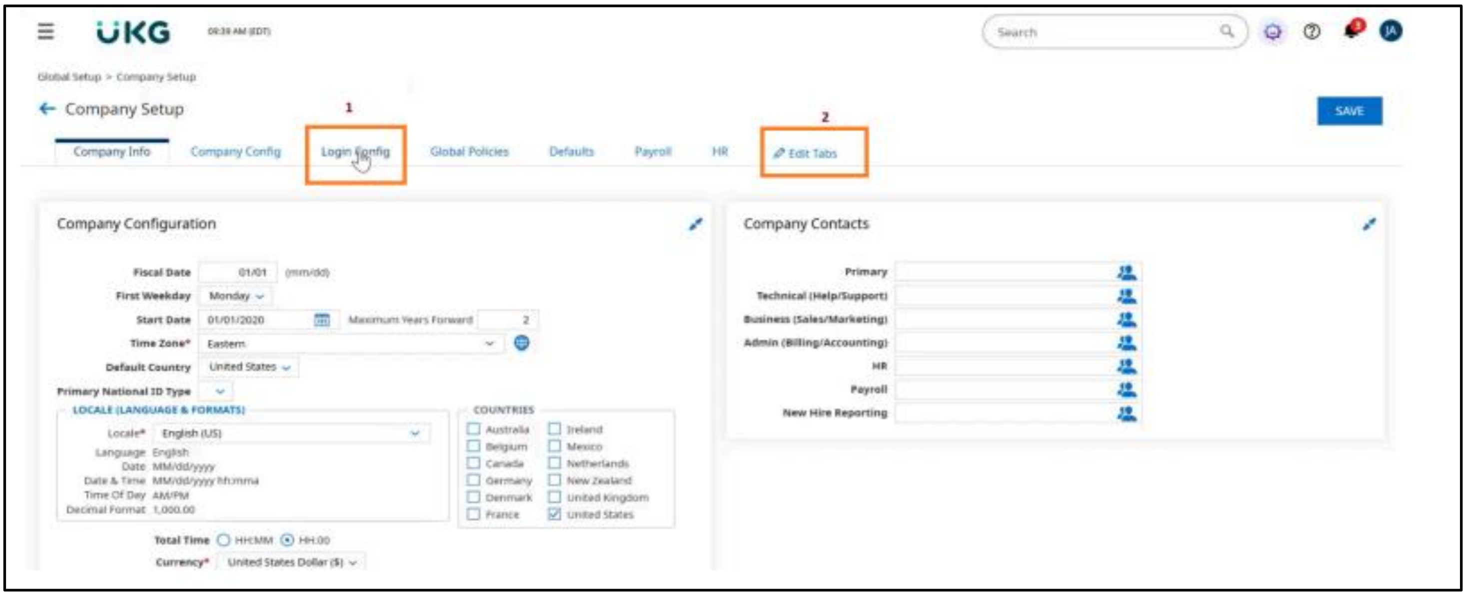
STEP 2: New Company Set Up - Connecting an Additional OAuth Application

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

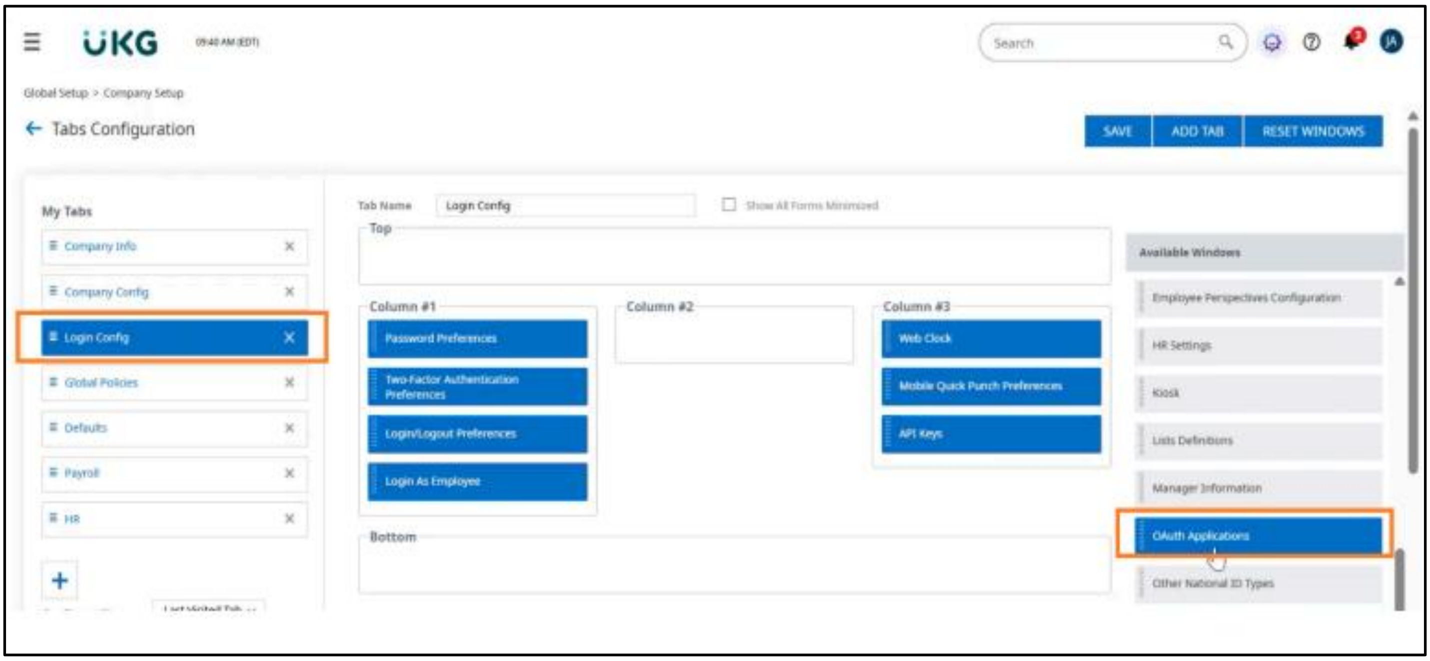


2. Click on **Login Config.**

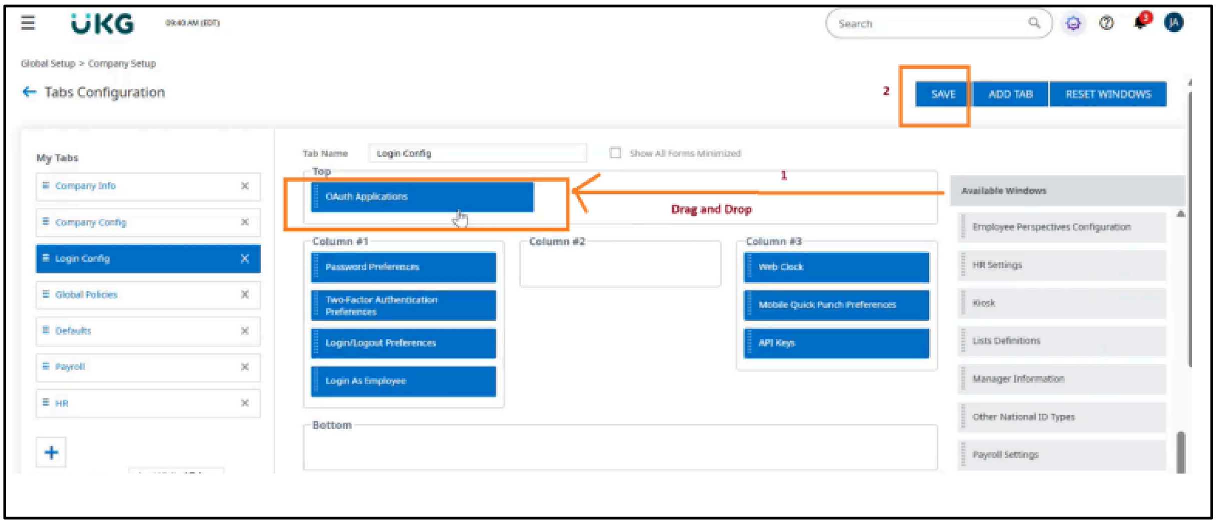
TIP: Sometimes expected options (OAuth Applications) are not always visible as available options within Login Config window. This can vary slightly from customer to customer. If it is not visible, Click on Edit tabs option to add it.



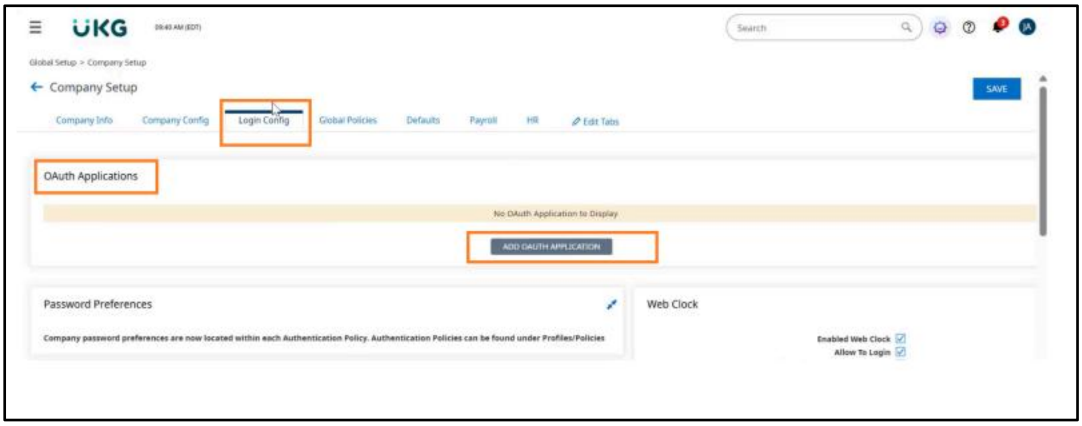
3. Within the **Edit Tabs** window, make sure **Login Config** option within **My Tabs** section to the left is highlighted and within Available Windows section, scroll down until you find OAuth Applications.



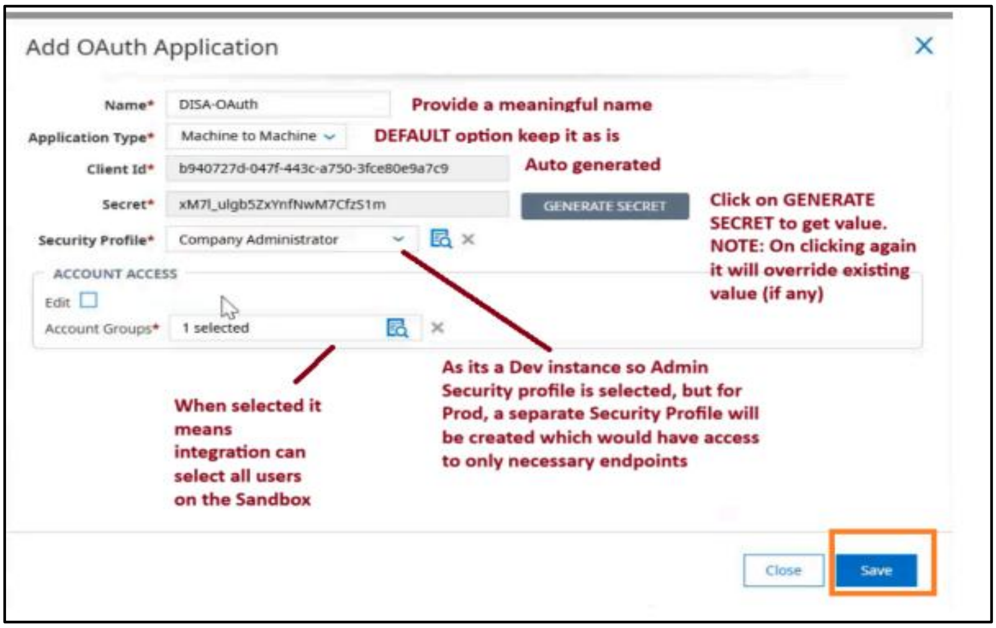
4. Drag and Drop **OAuth Application** from the Available Windows on the right over to **Top** and Click **Save**.



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



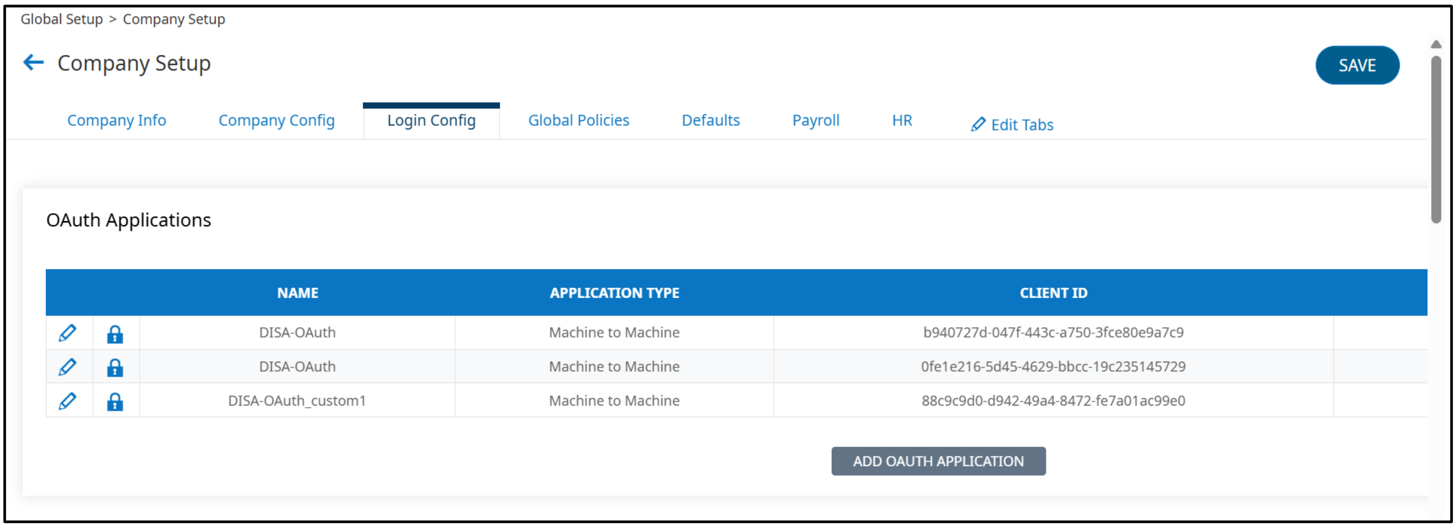
6. Add the below OAuth configurations and click **Save.**



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.

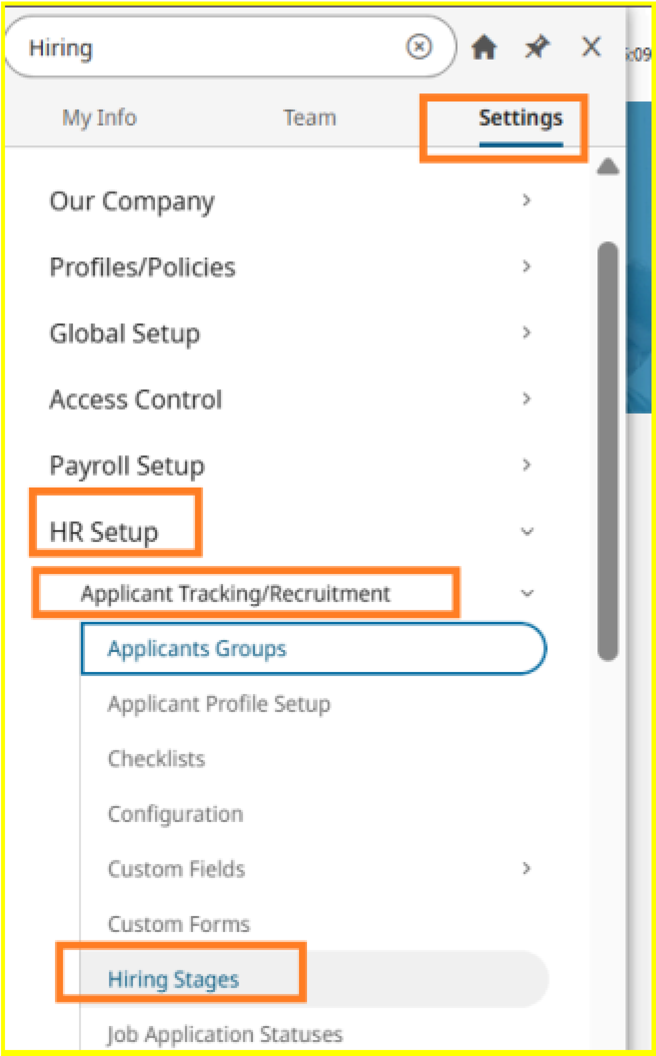
7. Within the **Login Config** window, you should now see the newly created OAuth configuration. Click **Save**.



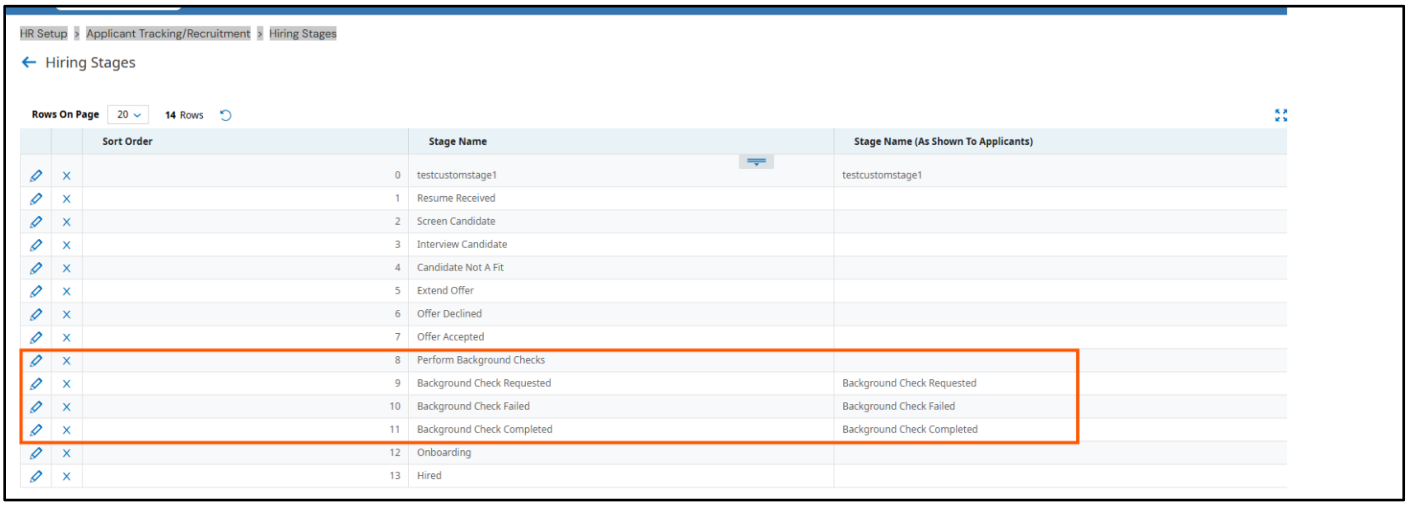
STEP 3: Create Custom Hiring Stages

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 "**Perform Background Checks**" and click **Save**.
4. Add 2nd custom hiring stage, with the name "**Background Check Requested**" and click **Save**.
5. Add 3rd custom hiring stage, with the name **"Background Check Failed"** and click **Save.**
6. Add 4th custom hiring stage, with the name **"Background Check Completed"** and click **Save.**
7. You should now see the 4 new custom Hiring Stages.



TIP: Sort Order may vary depending on what other stages are in your instance. However, it is important that these 4 stages are in the shown sequence.

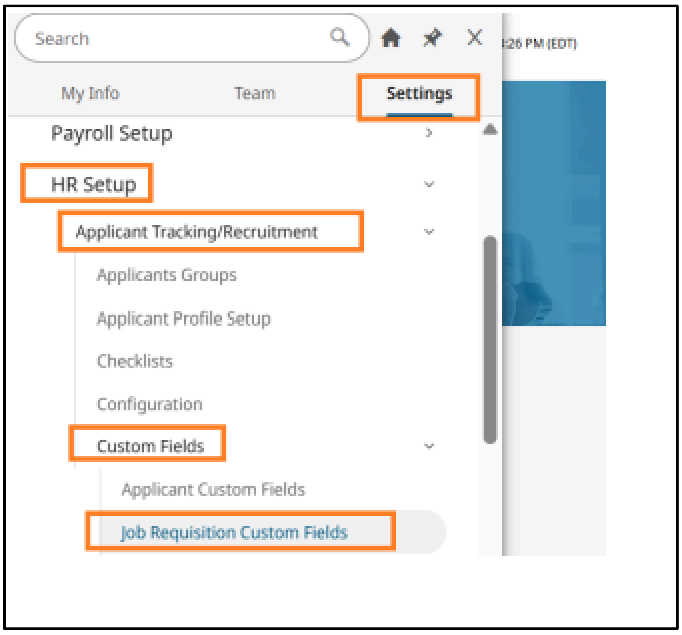
TIP: These new Hiring Stages will not retroactively update to applicants tied to Job Requisitions that existed prior to the new stages. You will need to create NEW Job Requisitions to leverage the new Hiring Stages used by the DISAScreen integration.

STEP 4: Create Custom Field

Job Requisition Level Fields

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

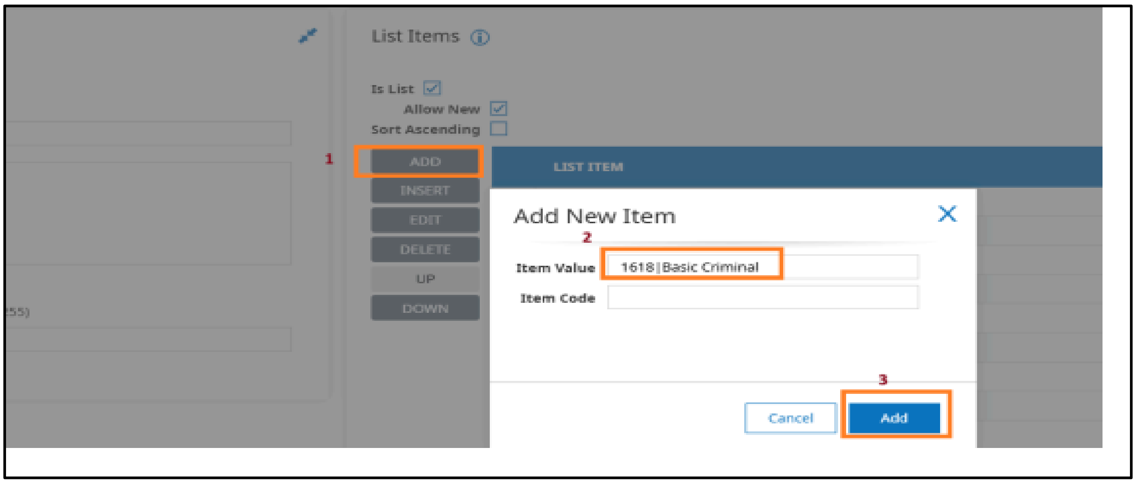
2. In the menu, Select the "**Settings**" tab and then click **"HR Setup"**. Under the **"HR Setup"** section, click on **"Applicant Tracking/Recruitment"** > **Custom Fields > Job Requisition Custom Fields.**



3. On the "**Job Requisition Custom Fields**" page, click "**Add New Field**".
   Custom field 1:
   - Enter the field name (Label) as **PackageDetails** (**TIP:** There is not a space between the words; please add as listed)
   - 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

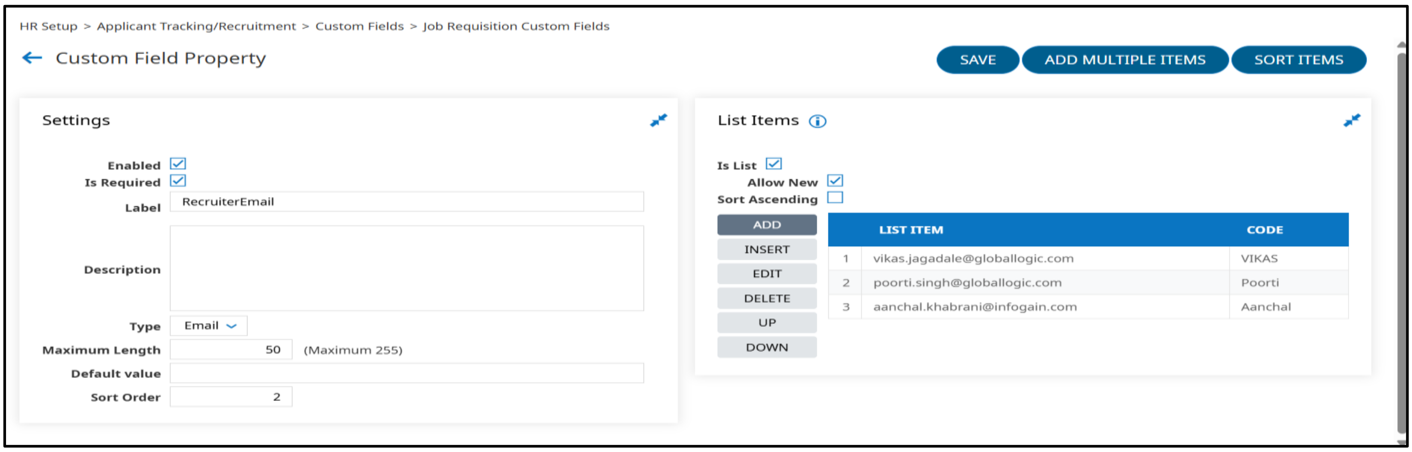
- Packages Format within the Item Value Should be **PACKAGE ID|Package Name** i.e. Package ID and package names are separated by the | symbol.
- **For Example:** If the Package ID = 1618 and the Package Name = Basic Criminal then the Item Value would be entered as “1618|Basic Criminal”.
- **TIP:** Please make sure there are no spaces between the package ID number, pipe sign and the start of the package name

- Repeat to add all the required packages and click **Save.**



Custom Field2:

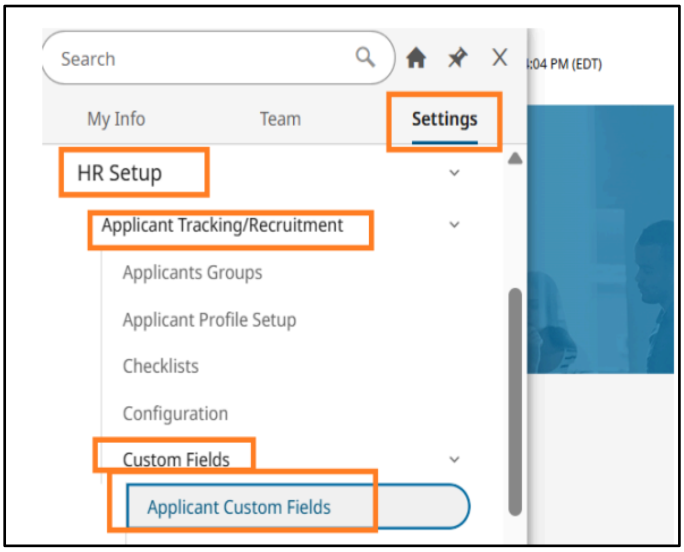
- Set Label as **RecruiterEmail.** (**TIP:** There is not a space between the words; please add as listed)
- Make sure to check the Enabled & Required option.
- Change the “Maximum Length” field from 10 to 50 to ensure the entire email is stored.
- If not already set, ensure Sort Order is 2.
- Within List Items Section, Check “**is List**” & “**Allow New**”
- Click on Add button, and in the Item Value enter the **RecruiterEmail**.
- **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**”.

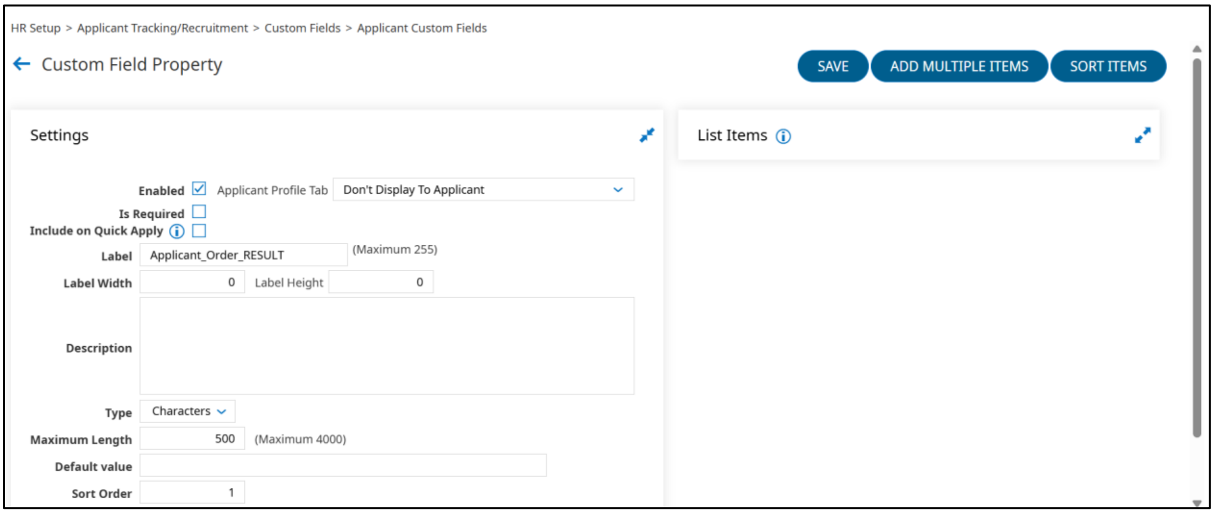
2. In the menu, Select the "**Settings**" tab and then click **"HR Setup"**. Under the **"HR Setup**" section, click on **"Applicant Tracking/Recruitment"** > **Custom Fields > Applicant Custom Fields.**



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

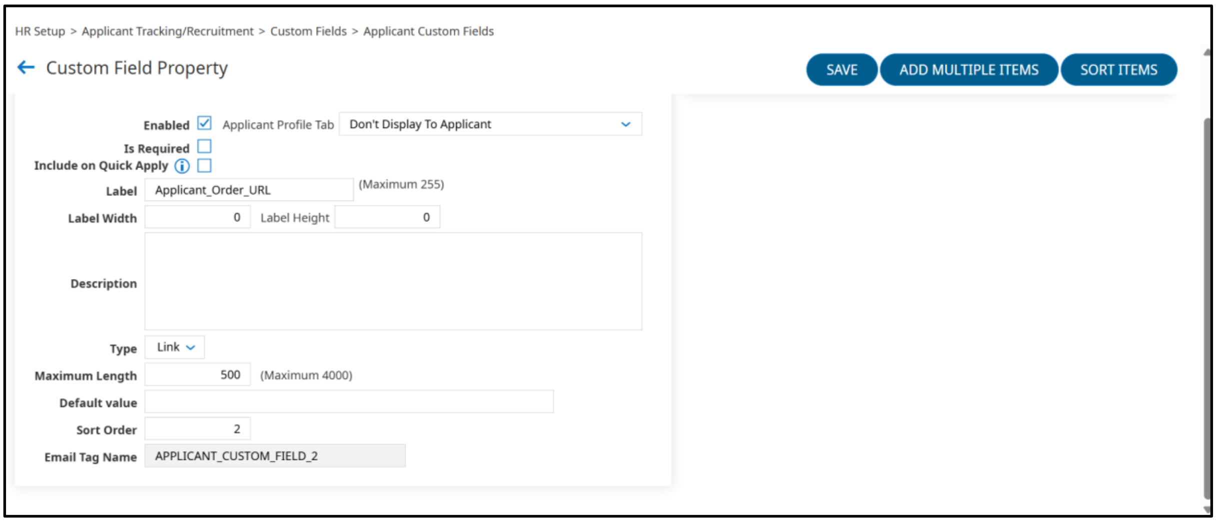
Custom Field 1:

- 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.**



Job Requisition Updates

Due to requirements in UKG, new Job Requisitions will need to be created to leverage the DISA integration with the updated hiring stages and job requisition level details. Step 5 below is required for all accounts while Step 6 is only required if your DISAScreen account is set up with sub-locations or organizations. Most legacy accounts with GHRR did not have sub-locations which means your DISAScreen account has been mirrored with a single location and will not require Step 6; we will notify you specifically if you need to follow this step.

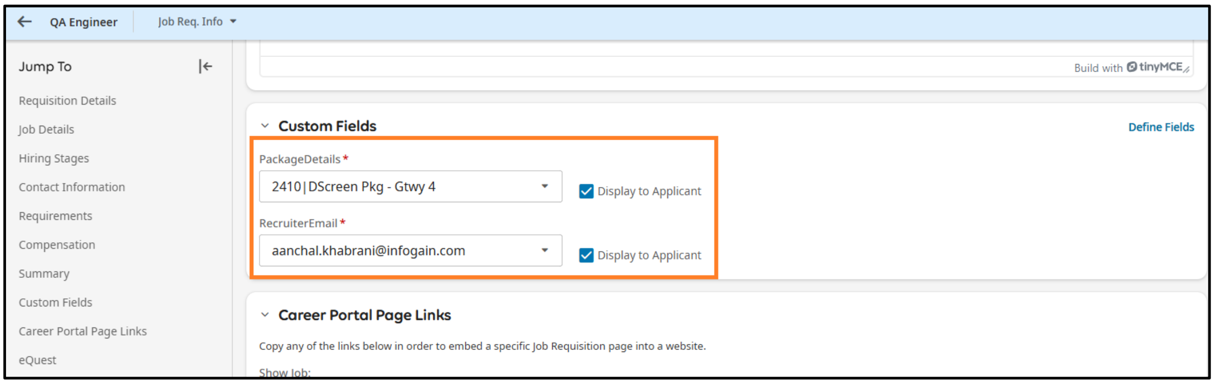
TIP: Job Requisition data is only made visible in the API when the Requisition is Active (and without an end date near expiring) and the Job Type is either External or Internal & External.

STEP 5: Updating Job Requisitions with Package Details

Job requisitions will need to be configured to send the package information required for the specific job and the recruiter (or user) email for order routing into DISAScreen. Navigate to your new job requisition and update accordingly.

TIP: Remember, the email address in the Recruiter email field must match a user on the DISAScreen account for proper order placement.

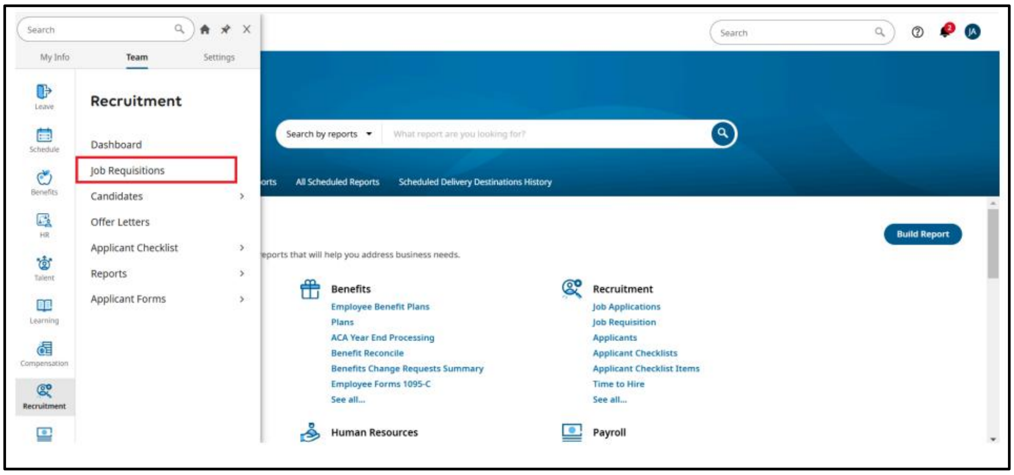
NOTE: The Display to Applicant box is optional. Uncheck the boxes if you do not want applicants to be able to see the package and recruiter details posted on the Job.



STEP 6: Updating Job Requisitions with Mapped Location Details (Optional)

Job requisitions will need to be configured to send Location Identifiers to route orders appropriately when the DISAScreen account is set up with multiple locations/sub-locations. The below steps start with creating a new Job Requisition. To update or map 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**".

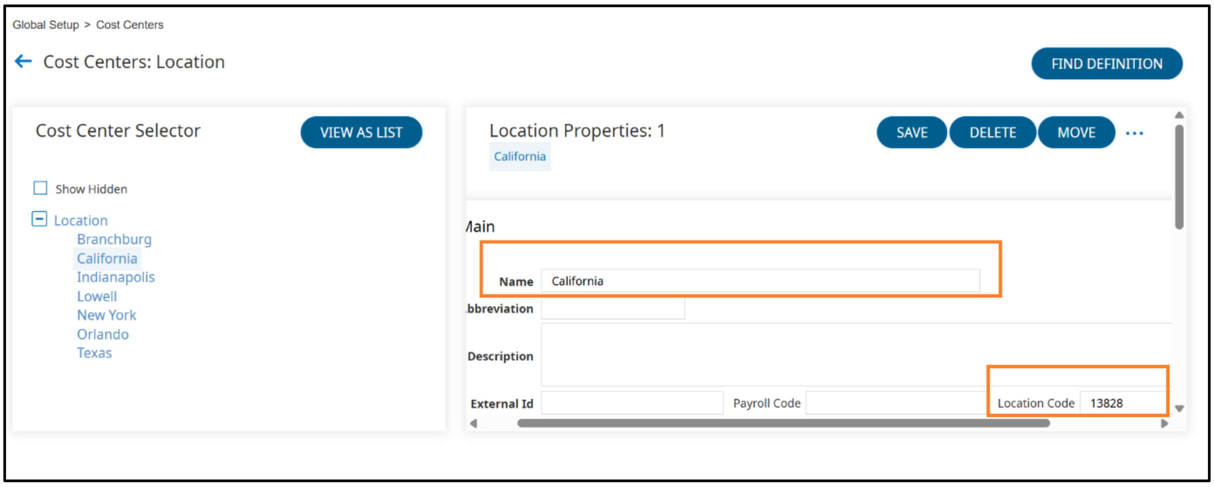
5. A new "**Job Requisition**" page will appear. Enter the details for fields highlighted below and click "**Save**".

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

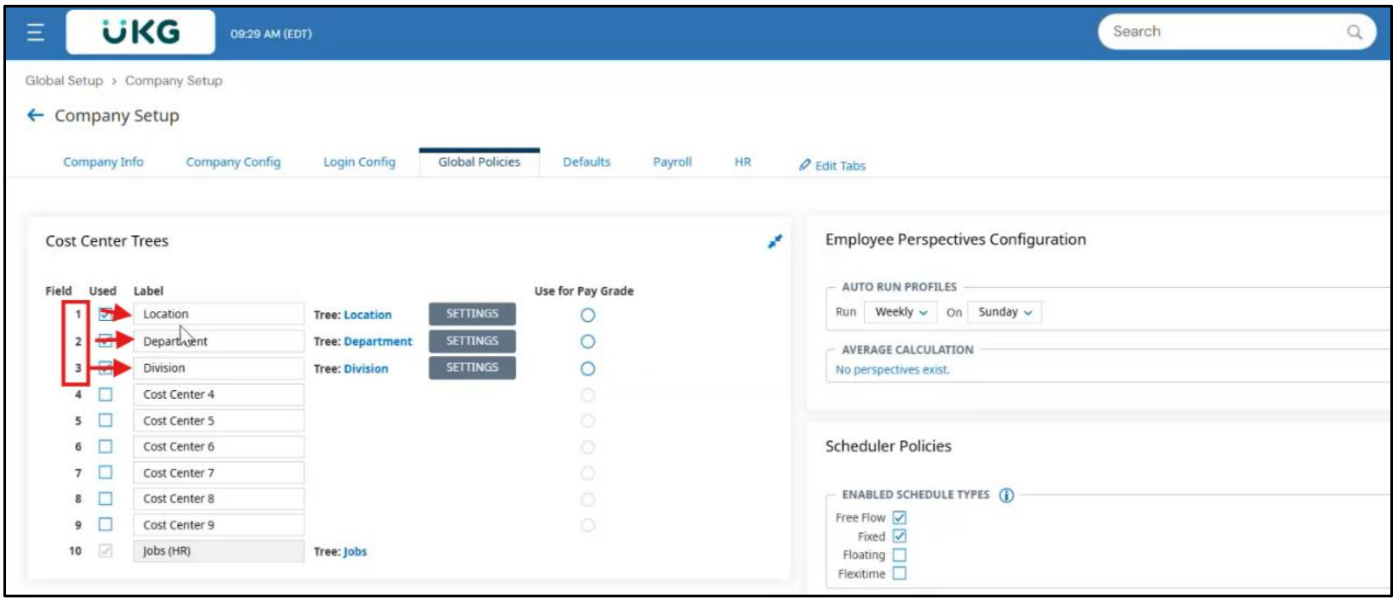
6. **Location Updates & Mapping**: The Job Requisition must tag the location for order routing within DISAScreen. This is managed through Locations mapped within your Cost Centers. Mapped cost centers can be updated with existing cost center nodes (i.e. Location, Department, Division) or with a custom cost center.

- Navigate to Cost Centers through Global Setup >> Company Set up >> Cost Centers. Select the appropriate Cost Center node.
- Add or 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.**
- Continue updating Cost Center values that need to be used for order routing in DISAScreen.

TIP: The location name must match exactly in UKG and DISAScreen. DISAScreen Names and Org ID values will come from your migration project manager.



- Check Cost Center Tree Location: Go to Global Setup >> Company Set up >> Global Policies to view Cost Center Trees. DISA will need the field value within the Tree that corresponds to the mapped field (Location (1), Dept (2) or Division (3), etc.)



- Confirm or update your new Job Requisition(s) with the mapped cost center value(s).