



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)

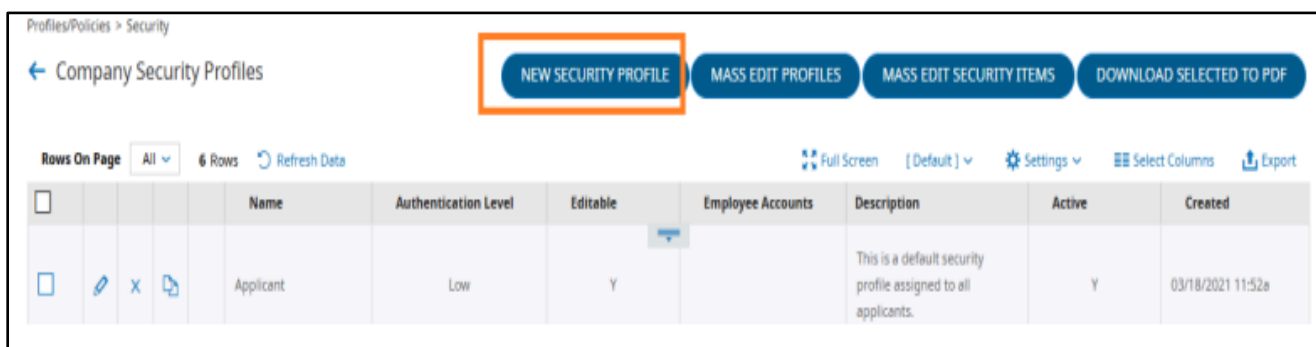
NOTE – You will not be able to edit the configurations for your existing UKG Ready Integration. You will need to follow Step 2 in this guide.

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				
Cost Centers Configuration	View	Edit	Add	Delete
HR Settings	Yes	Yes		
Lists Definitions	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	
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	Add	Delete
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 Employee 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	
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	
Configuration	View/Edit			(See All Applicants)
Hiring Stages Configuration	View/Edit	Yes	Yes	
Job Application Statuses	View/Edit	Yes	Yes	
Job Applications	View/Edit	Yes	(See All Job Applications)	(Mass Edit)
Job Requisition Custom Fields Definitions	View/Edit			
Job Requisition Custom Values	View/Edit			
Job Requisition Hiring Stages	View/Edit			
Job Requisition Workflow	View/Edit			
Job Requisitions	View/Edit	Yes	Yes	
Use Job Board	View/Edit		(See All Job Requisitions)	(Close/Re-Open Job Requisitions)
			(Edit Submitted/Approved)	
HR - Succession Planning				
Permission		Add		Delete

Modules - Imports				
Applicants				
Demographic Custom Fields				
Employee Country Specific Fields				
Employees				
HR Custom Fields				
Modules - REST API Resources				
Applicants	View	Edit	Add	Delete
	Yes	Yes		
Job Application	Yes	Yes		
OAuth Applications	Yes	Yes	Yes	Yes
	Yes	Yes	Yes	Yes
Reports - Reports				
Custom Filter	(CSV/Text)			
Export Reports				
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)

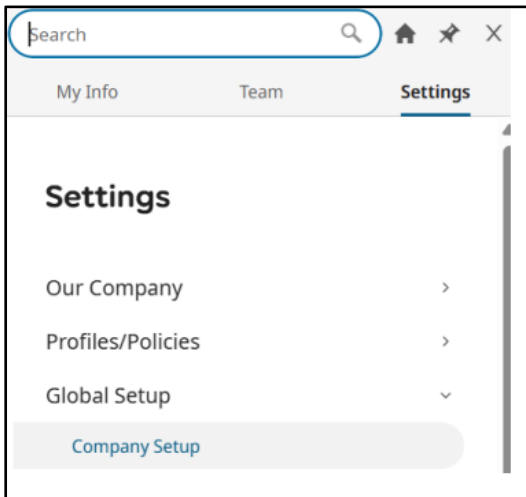
Employee Self Service - Menu			
Show Favorites in Main Menu			
Solutions Exchange - Links			
Applicant - Applicant			
Demographics	Permission	Add	Delete
Demographics Custom Values	View		
	View		
Applicant - My Custom Form Items			
No Custom Forms Defined			
Dashboards - Module Dashboards			
HR			
Recruitment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

[CLICK HERE](#) to view the Security Profiles in More Detail.

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

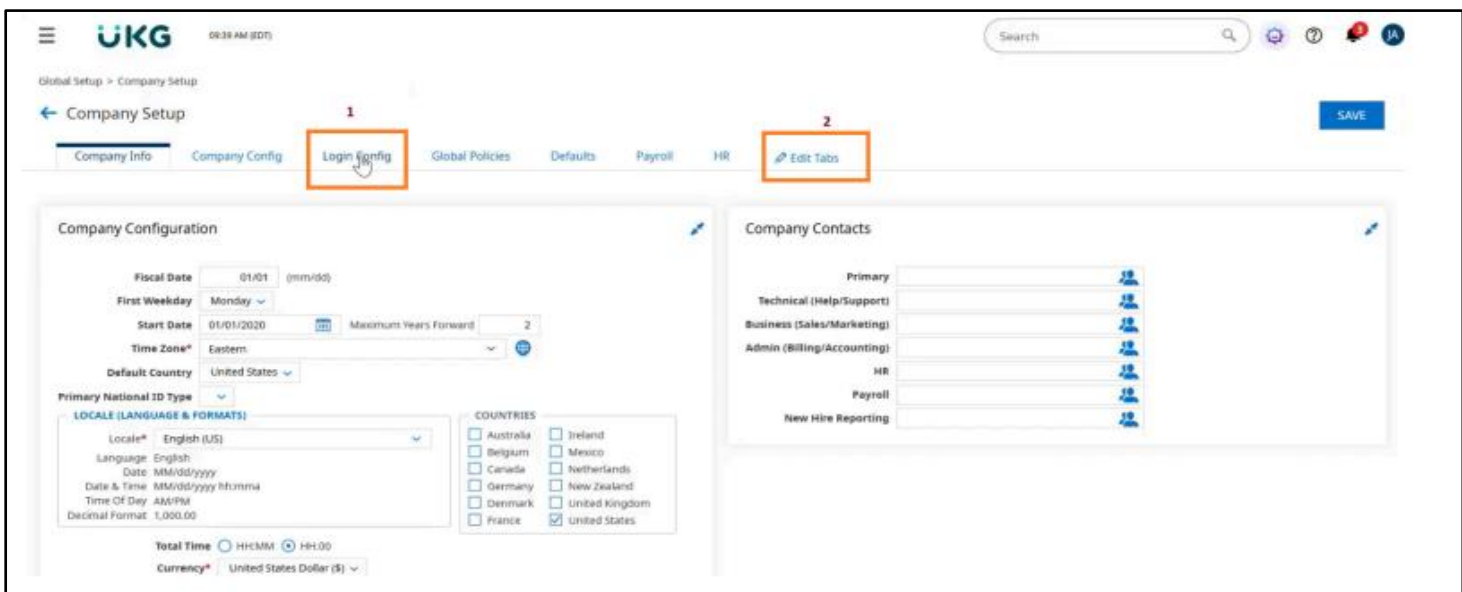
1. Login to UKG Ready. Click on the **Settings** tab, Under **Global Setup**, select **Company Setup**.



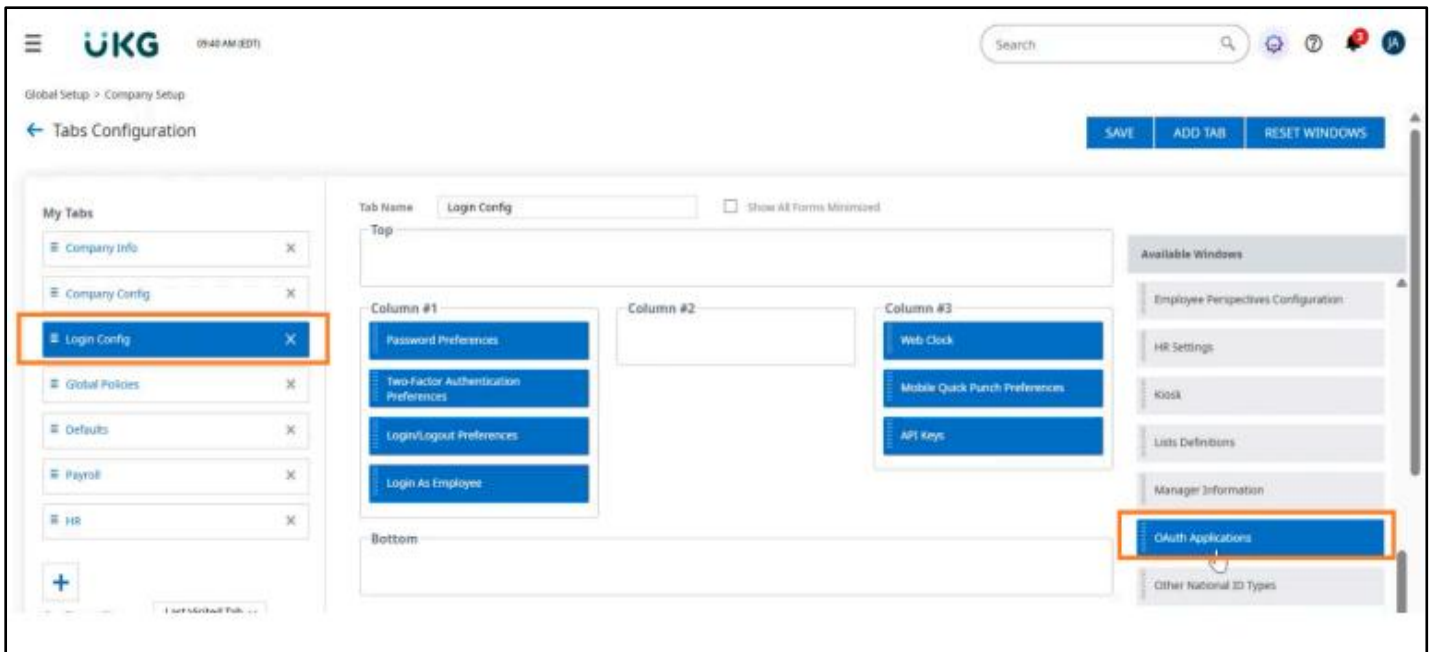


2. Click on **Login Config**.

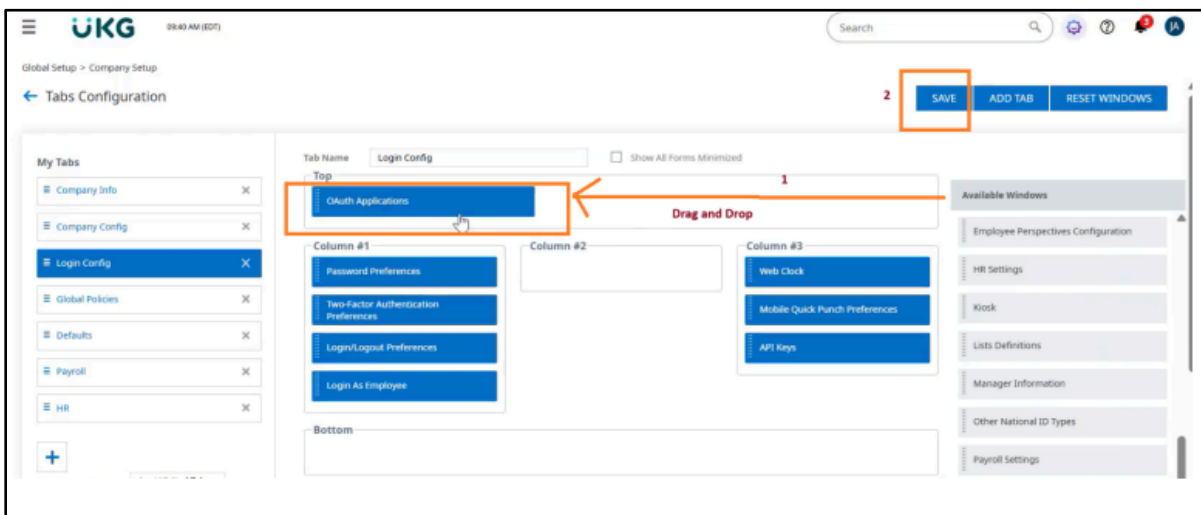
TIP: Sometimes expected options (OAuth Applications) are not always visible as available options within Login Config window. This can vary slightly from customer to customer. If it is not visible, Click on Edit tabs option to add it.



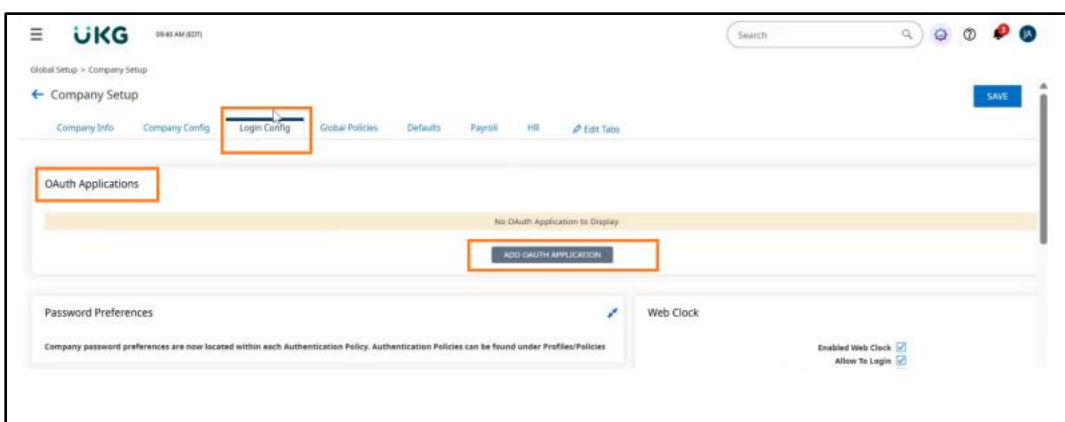
3. Within the **Edit Tabs** window, make sure **Login Config** option within **My Tabs** section to the left is highlighted and within Available Windows section, scroll down until you find OAuth Applications.



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**.

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_ulgb5ZxYnfNwM7CfzS1m **Click on GENERATE SECRET to get value. NOTE: On clicking again it will override existing value (if any)**

Security Profile* Company Administrator

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

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

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

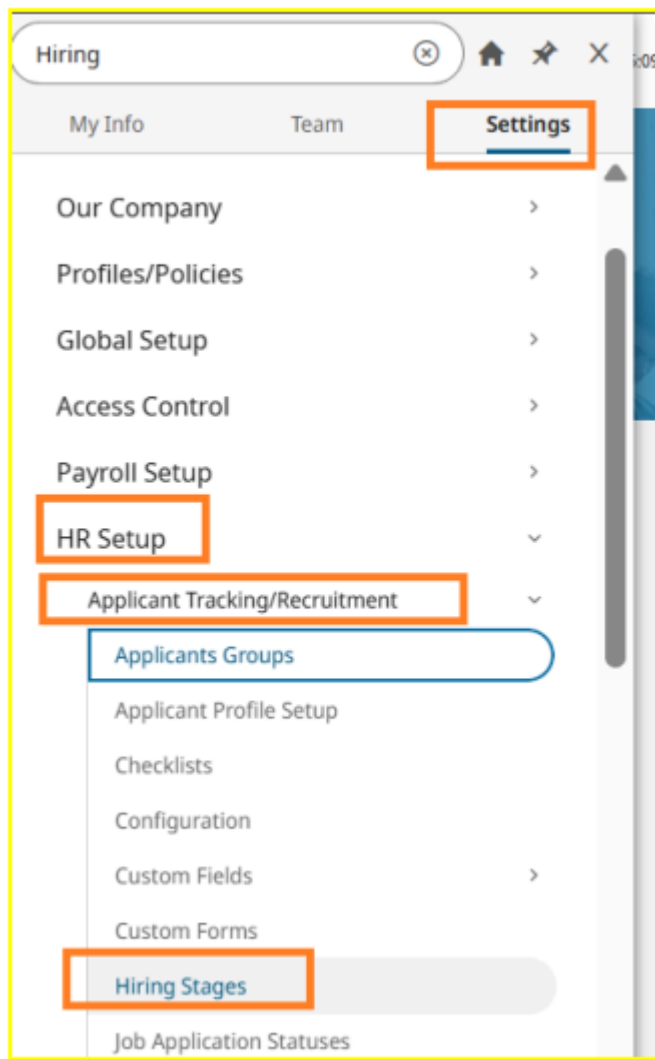
ADD OAUTH APPLICATION

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.

A screenshot of a web application's 'Hiring Stages' table. The table has a header with 'Sort Order', 'Stage Name', and 'Stage Name (As Shown To Applicants)'. There are 14 rows in total. The last four rows (rows 8, 9, 10, and 11) are highlighted with an orange box. These rows represent custom hiring stages: 'Perform Background Checks', 'Background Check Requested', 'Background Check Failed', and 'Background Check Completed'.

	Sort Order	Stage Name	Stage Name (As Shown To Applicants)
	0	testcustomstage1	testcustomstage1
	1	Resume Received	
	2	Screen Candidate	
	3	Interview Candidate	
	4	Candidate Not A Fit	
	5	Extend Offer	
	6	Offer Declined	
	7	Offer Accepted	
	8	Perform Background Checks	
	9	Background Check Requested	Background Check Requested
	10	Background Check Failed	Background Check Failed
	11	Background Check Completed	Background Check Completed
	12	Onboarding	
	13	Hired	

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.

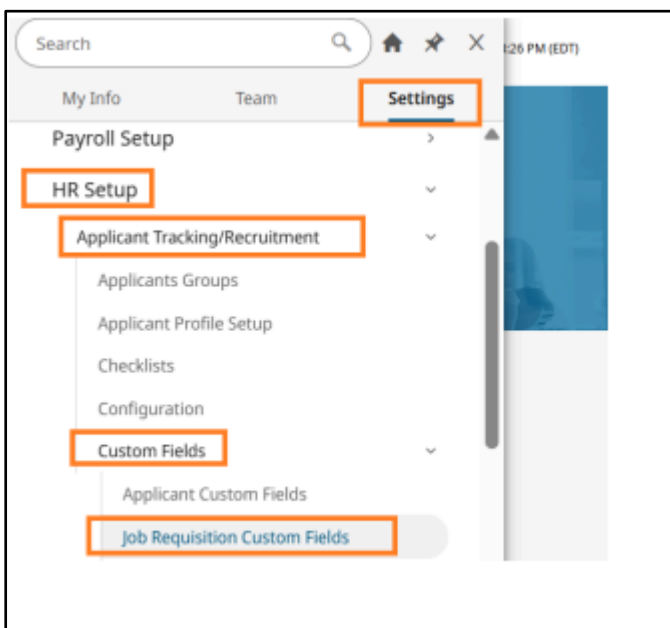
STEP 4: Create Custom Field

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)
- 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)
- 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.

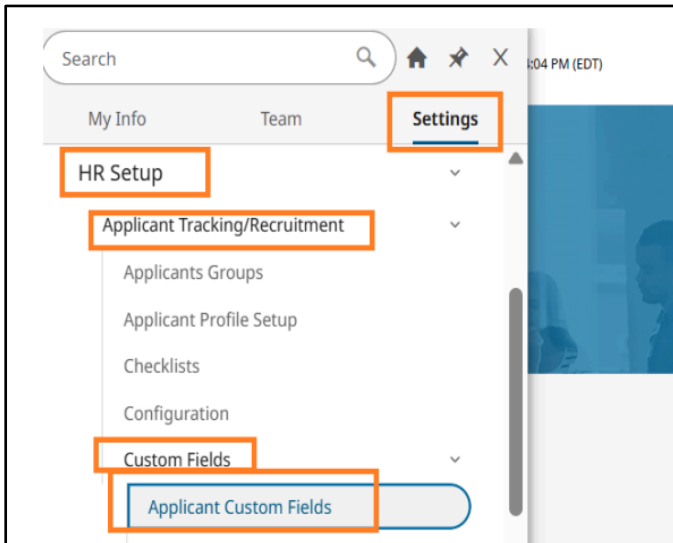
LIST ITEM	CODE
1 vikas.jagadale@globallogic.com	VIKAS
2 poorti.singh@globallogic.com	Poorti
3 aanchal.khabrani@infogain.com	Aanchal

Applicant Level Fields

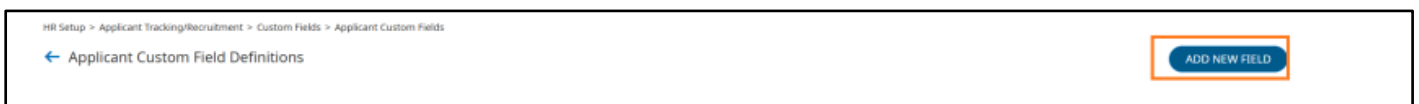
1. Navigate to the Home Page and click on the “**Menu**”.



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**.

A screenshot of the 'Custom Field Property' form. The form is divided into two main sections: 'Settings' on the left and 'List Items' on the right. The 'Settings' section contains the following fields: 'Enabled' (checked), 'Applicant Profile Tab' (set to 'Don't Display To Applicant'), 'Is Required' (unchecked), 'Include on Quick Apply' (unchecked), 'Label' (set to 'Applicant_Order_RESULT', with a note '(Maximum 255)'), 'Label Width' (set to 0), 'Label Height' (set to 0), 'Description' (empty text area), 'Type' (set to 'Characters'), 'Maximum Length' (set to 500, with a note '(Maximum 4000)'), 'Default value' (empty text field), and 'Sort Order' (set to 1). The 'List Items' section is currently empty. At the top right of the form, there are three buttons: 'SAVE', 'ADD MULTIPLE ITEMS', and 'SORT ITEMS'.

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**.

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

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.

QA Engineer Job Req. Info

Build with tinyMCE

Custom Fields

PackageDetails *

2410 | DScreen Pkg - Gtwy 4 ☒ Display to Applicant

RecruiterEmail *

aanchal.khabrani@infogain.com ☒ Display to Applicant

Career Portal Page Links

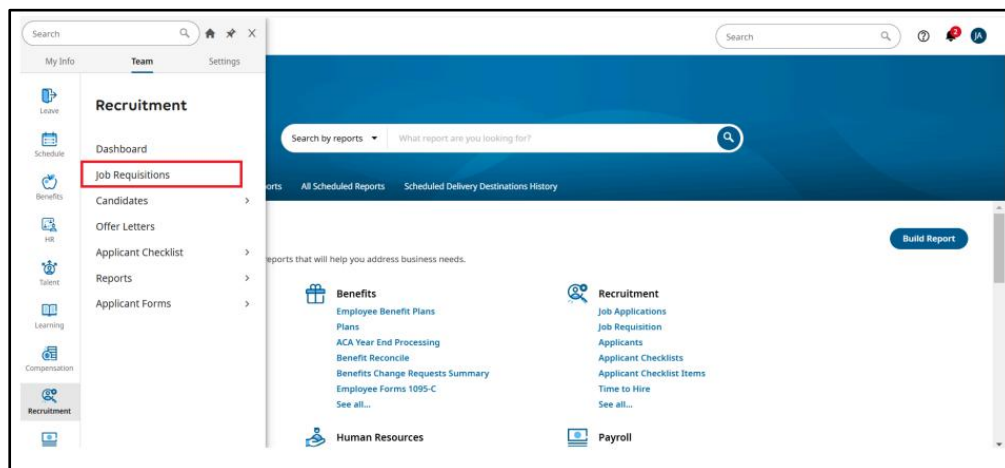
Copy any of the links below in order to embed a specific Job Requisition page into a website.

Show Job

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”.

UKG 08:52 AM (Eastern)

Recruitment > Job Requisitions

Job Requisition

Add New Free Post on eQuest View

Quick Find

Page 1 of 1 1 - 1 of 1 Rows Current: [System]

	Active	Budgeted	Job Status	Requisition #	Location	Job Title	# Applicants	Job Category	Job Industry #1
☐	Y		Opened	17110080	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. 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.

Global Setup > Cost Centers

← Cost Centers: Location FIND DEFINITION

Cost Center Selector VIEW AS LIST

☐ Show Hidden

☒ Location

- Branchburg
- California
- Indianapolis
- Lowell
- New York
- Orlando
- Texas

Location Properties: 1 SAVE DELETE MOVE ...

California

Main

Name California

Abbreviation

Description

External Id Payroll Code Location Code 13828

- 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.)

UKG 09:29 AM (EDT) Search

Global Setup > Company Setup

← Company Setup

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

Cost Center Trees

Field	Used	Label	Tree	Use for Pay Grade
1	☒	Location	Tree: Location	☐
2	☒	Department	Tree: Department	☐
3	☒	Division	Tree: Division	☐
4	☐	Cost Center 4		☐
5	☐	Cost Center 5		☐
6	☐	Cost Center 6		☐
7	☐	Cost Center 7		☐
8	☐	Cost Center 8		☐
9	☐	Cost Center 9		☐
10	☒	Jobs (HR)	Tree: Jobs	☐

Employee Perspectives Configuration

AUTO RUN PROFILES

Run Weekly On Sunday

AVERAGE CALCULATION

No perspectives exist.

Scheduler Policies

ENABLED SCHEDULE TYPES

Free Flow ☒ Fixed ☒ Floating ☐ Flextime ☐

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

UKG

10:14 AM (EDT)

Search

←

QA Engineer

Job Req. Info ▾

Jump To

←

Requisition Details

Job Details

Hiring Stages

Contact Information

Requirements

Compensation

Summary

Custom Fields

Career Portal Page Links

eQuest

Job Requisition Template

Job Requisition Workflow

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☐ 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