

Customer Guide for Integrating UKG Ready

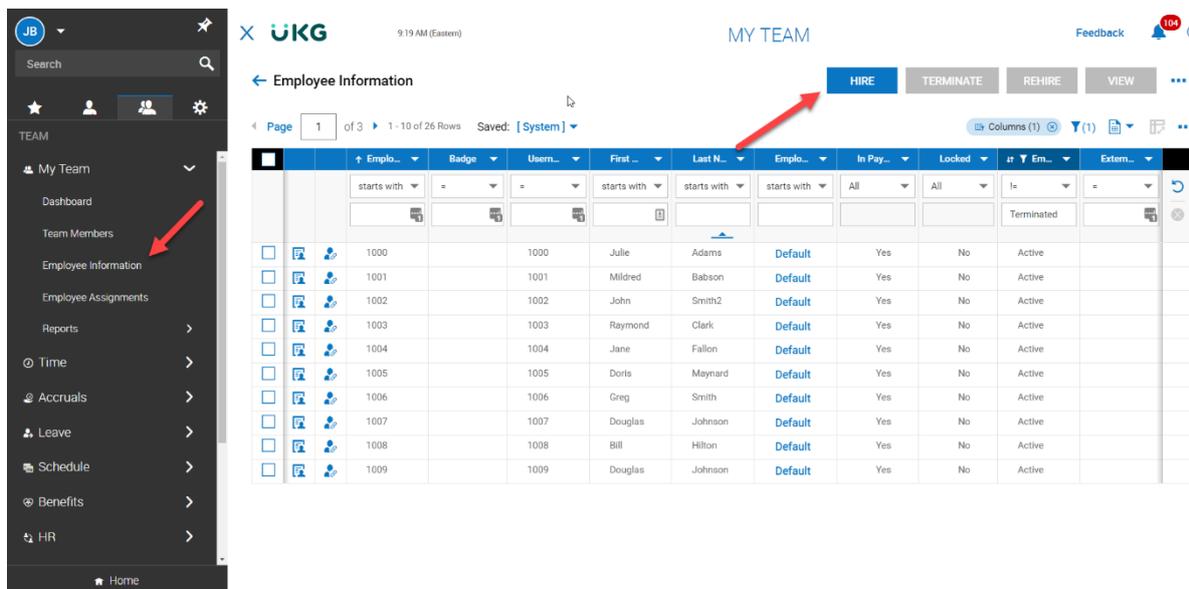
API User Account

A UKG Ready username and password must be created and provided to orginio. This is required to access the APIs.

Creating the Account

Adding an API user account is similar to adding a regular user/employee to UKG Ready:

- Navigate to Team > My Team > Employee Information and click "HIRE"
- Enter the required information – including username and password – and proceed
- The username and password have to be provided to orginio. Before doing so, it is suggested to sign into the UKG Ready web interface with the new user account to reset the password and ensure that the account is in a usable state. Make sure to set a strong password as this account will be used to interface with data stored in UKG Ready.



The screenshot shows the UKG Ready web interface. On the left is a dark navigation sidebar with a search bar and a list of options: My Team, Dashboard, Team Members, Employee Information (highlighted with a red arrow), Employee Assignments, Reports, Time, Accruals, Leave, Schedule, Benefits, and HR. The main content area is titled 'Employee Information' and includes a 'HIRE' button (highlighted with a red arrow), along with 'TERMINATE', 'REHIRE', and 'VIEW' buttons. Below the buttons is a table of employee records.

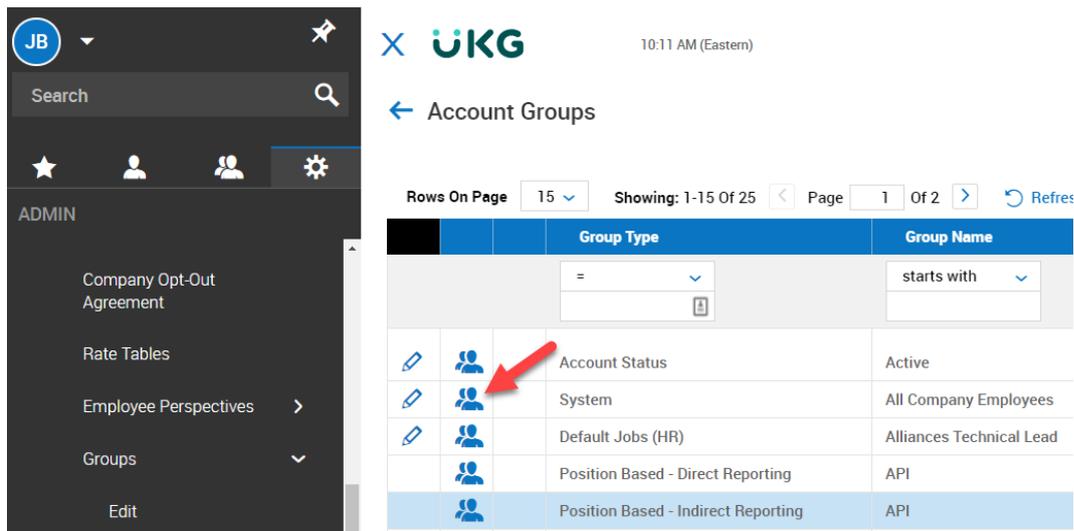
	Emplo...	Badge	Usen...	First ...	Last N...	Emplo...	In Pay...	Locked	# Em...	Extern...
	starts with	=	=	starts with	starts with	starts with	All	All	=	=
									Terminated	
<input type="checkbox"/>		1000	1000	Julie	Adams	Default	Yes	No	Active	
<input type="checkbox"/>		1001	1001	Mildred	Babson	Default	Yes	No	Active	
<input type="checkbox"/>		1002	1002	John	Smith2	Default	Yes	No	Active	
<input type="checkbox"/>		1003	1003	Raymond	Clark	Default	Yes	No	Active	
<input type="checkbox"/>		1004	1004	Jane	Fallon	Default	Yes	No	Active	
<input type="checkbox"/>		1005	1005	Doris	Maynard	Default	Yes	No	Active	
<input type="checkbox"/>		1006	1006	Greg	Smith	Default	Yes	No	Active	
<input type="checkbox"/>		1007	1007	Douglas	Johnson	Default	Yes	No	Active	
<input type="checkbox"/>		1008	1008	Bill	Hilton	Default	Yes	No	Active	
<input type="checkbox"/>		1009	1009	Douglas	Johnson	Default	Yes	No	Active	

Add the API User

Configuring Group Permissions

Group permissions need to be configured. To allow the API user to access all employees, the newly created user account needs to be added as a manager of the group “All Company Employees”.

- Navigate to Settings > Global Setup > Groups > Edit, and select the  icon next to the group “All Company Employees”
- Click the “ADD MANAGER” button, search for the API user account, and select “ADD”
- No additional permissions need to be selected for orginio when adding the user as a manager



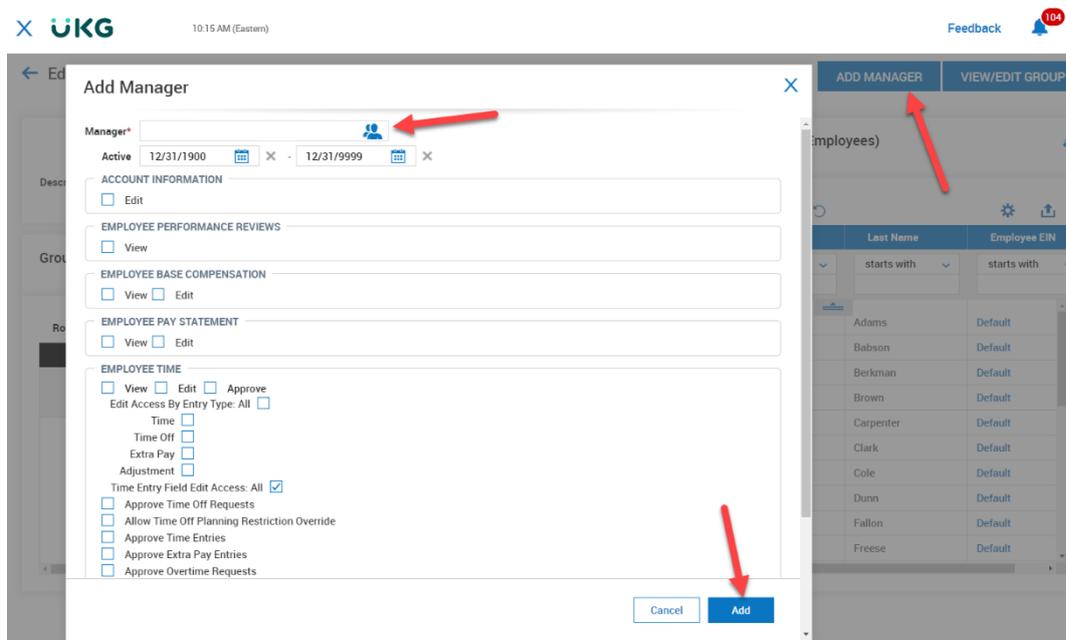
UKG 10:11 AM (Eastern)

Account Groups

Rows On Page 15 Showing: 1-15 Of 25 Page 1 Of 2 Refresh

	Group Type	Group Name
	=	starts with
 	Account Status	Active
 	System	All Company Employees
 	Default Jobs (HR)	Alliances Technical Lead
	Position Based - Direct Reporting	API
	Position Based - Indirect Reporting	API

Select the Group



UKG 10:15 AM (Eastern) Feedback 104

← Ed Add Manager

Manager* 

Active 12/31/1900 - 12/31/9999

ACCOUNT INFORMATION Edit

EMPLOYEE PERFORMANCE REVIEWS View

EMPLOYEE BASE COMPENSATION View Edit

EMPLOYEE PAY STATEMENT View Edit

EMPLOYEE TIME View Edit Approve

Edit Access By Entry Type: All

Time

Time Off

Extra Pay

Adjustment

Time Entry Field Edit Access: All

Approve Time Off Requests

Allow Time Off Planning Restriction Override

Approve Time Entries

Approve Extra Pay Entries

Approve Overtime Requests

Cancel Add

ADD MANAGER VIEW/EDIT GROUP

employees)

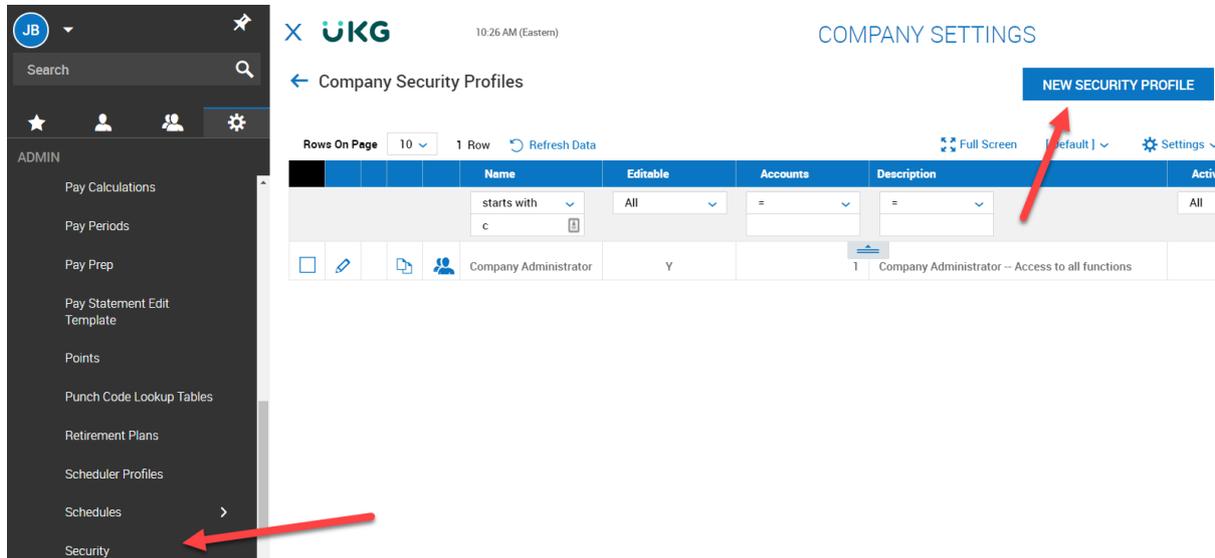
Last Name	Employee EIN
starts with	starts with
Adams	Default
Babson	Default
Berkman	Default
Brown	Default
Carpenter	Default
Clark	Default
Cole	Default
Dunn	Default
Fallon	Default
Freese	Default

Add the API User as a Manager

Creating the Security Profile

The API user account will need to be assigned to a security profile. The best practice is to configure a security profile that is used specifically for the integration. It is also suggested to add only the permissions that are required for the integration (see next section).

To create a new security profile, navigate to Settings > Profiles/Policies > Security, and click the "NEW SECURITY PROFILE" button.



The screenshot shows the UKG 'COMPANY SETTINGS' interface. On the left is a dark navigation menu with 'Security' highlighted. The main area is titled 'Company Security Profiles' and features a table with columns for Name, Editable, Accounts, Description, and Active. A 'NEW SECURITY PROFILE' button is visible in the top right. A red arrow points from the 'Security' menu item to the main content area, and another red arrow points to the 'NEW SECURITY PROFILE' button.

Create a New Security Profile

Security Profile Permissions

orginio needs the following permissions in the security profile to be able to import data from UKG Ready.

In the tab "Reports" check the following checkboxes:

- Export Reports
- CSV/Text

Security Items

Full Access

Global TLM Payroll HR Modules Profiles Reports ESS Marketplace Applicant Dashboards Testing

REPORTS

Export Reports (CSV/Text) (Excel) (Google Sheets) (PDF) (HTML) (XML) (ICS) (Image)

Report Sharing User Selection

ADJUSTMENT PAY REPORTS

Security Profile Permissions - Reports

In the tab "HR" the following properties need to be set to "View" in the Employee section:

- Employee Information (My Team)
- Account/Personal Information
- Cost Centers
- Demographics
- Managers

Security Items

Full Access

Global TLM Payroll **HR** Modules Profiles Reports ESS Marketplace Applicant Dashboards Testing

ASSETS (PROPERTY) TRACKING

	View	Edit	Add	Delete
Asset Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assets (Property)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assets (Property) Assignments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Company Vehicles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vehicle Assignments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

EMPLOYEE

	Permission	Add	Delete	
Employee Information (My Team)	View	<input type="checkbox"/>	<input type="checkbox"/>	
Account Authentication				
Account Benefit Open Enrollment Extra Settings		<input type="checkbox"/>	<input type="checkbox"/>	
Account/Personal Information	View			
Additional Compensation				
Additional Compensation Settings				
Base Compensation				(<input type="checkbox"/> Limited View) (<input type="checkbox"/> Hide PP In Year)
Benefit Children Premium Calculation				
Benefit Enrollment Questionnaire				
Benefit Management (Plans)		<input type="checkbox"/>	<input type="checkbox"/>	(<input type="checkbox"/> Edit Dependent Effective To) (<input type="checkbox"/> Delete Benefit Change Request)
Benefit Salary				
Benefits Statement Report				
CA 2810.5 Forms		<input type="checkbox"/>	<input type="checkbox"/>	
Checklists		<input type="checkbox"/>	<input type="checkbox"/>	(<input type="checkbox"/> Complete Steps)
Cost Centers	View			
Credentials (Example: Driver License, Passport)		<input type="checkbox"/>	<input type="checkbox"/>	
Dates				
Deductions		<input type="checkbox"/>	<input type="checkbox"/>	(<input type="checkbox"/> Mass Edit)
Delivery Policies				
Demographics	View			
Jobs				
Managed Daily Rules				
Managed Scheduled Cost Centers		<input type="checkbox"/>	<input type="checkbox"/>	
Managers	View			

Security Profile Permissions - HR

Adding the Security Profile to the API User

After the security profile has been created, open the API user account

- Navigate to Team > My Team > Employee Information and select the icon next to the API user account.
- Select "Manage Profiles" from the "Profiles" widget.
- Select the icon next to "Security"
- Select the newly created API security profile, then click "SAVE."

UKG 10:42 AM (Eastern) MY TEAM

← Employee Profile

api user99 | Employee ID: 234234 | Hired Date: 14 Jan, 2021 (1 Month, 2 Days)

Main Payroll HR Schedules Edit Tabs

JUMP TO

- Profiles
- Schedule
- Scheduled Cost Centers

Profiles

Profiles are settings which are applied to user accounts that determine key aspects for the user su schedule, etc. Profiles provide a convenient way to apply many settings to user accounts.

[Manage Profiles](#)

Manage Profiles Using the New UKG Ready UI

Manage Profiles X

JUMP TO

- Simple Profiles
- Retirement Plan
- Benefit
- Counter Distribution
- Data Retention
- Employee Perspectives
- Dashboard Layout
- Pay Calculation
- Pay Prep

Choose...		Holiday Table	
Labor Distribution		Leave of Absence	
Choose...		Choose...	
Pay Period		Performance Review	
Choose...		Choose...	
Points		PST Population	
Choose...		Choose...	
Scheduler		Security	
Choose...		APIPROFILE	
Succession		Timesheet	
Choose...		Time Stamp	
TS Auto Population		Training	
Holidays		Choose...	

Assign Security Profile

Employee Profile

api t
Empl

← Employee Pro

Manage Profiles

JUMP TO

- Simple Profiles
- Retirement Plan
- Benefit
- Counter Distribution
- Data Retention
- Employee Perspective
- Dashboard Layout
- Pay Calculation
- Pay Prep

Profiles

Schedule

Scheduled Cost C

Managed Schedu
Centers

Managed Cost C

Account Informa

Two-Factor Auth

Managers

Workflow Delega

Page 1 of 1 1 - 1 of 1 Rows

apiprofile

Name	Description
APIPROFILE	

CLOSE

CANCEL SAVE

Select the Newly Created API Security Profile