

Ultimate Software's UltiPro Core Data Inbound Integration Edge Integration Guide



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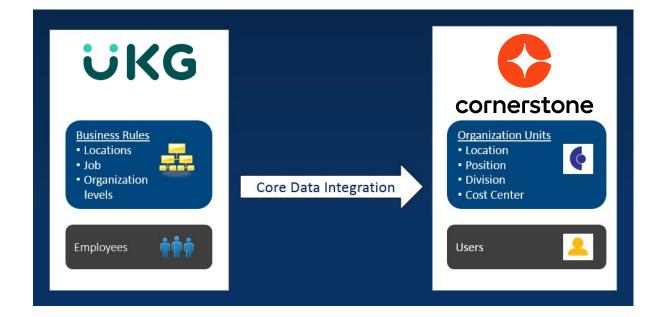
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Version history

VERSION	DATE	DESCRIPTION
1.0	05/24/2018	 Document creation
2.0	06/28/2018	 Updated the navigation to "Service Account Administration"
3.0	02/03/2020	 Updated Exclusion section to provide clarification on fourth bullet point
4.0	Nov 4, 2020	 Updated for UKG rebranding

Overview

Eliminate the need for duplicate data entry and centralize organization unit (OU) and user management by integrating Cornerstone OnDemand and UKG Pro. Cornerstone's integration with UKG Pro provides a seamless process for managing users and OU data between systems. It automatically transfers employees and configured Business Rules from UKG Pro to Cornerstone as users and OUs respectively.



In October 2020, Ultimate Software and Kronos Group merged to form UKG (Ultimate Kronos Group.) Cornerstone is working to update our systems to reflect this new branding.

In the meantime , this guide will refer to:

- The Edge Marketplace tile and configuration fields as the Ultimate UltiPro Core Data Inbound Integration and related Ultimate Software terminology.
- The combined Ultimate Kronos Group company and tools as UKG and UKG Pro.

Cornerstone University

Key Integration Details

- This is a one-way, inbound synchronization from UKG Pro to Cornerstone
- Users can login to Cornerstone via Sigle Sign On (SSO)
- The integration is scheduled to run nightly (PST)
 - » OU sync runs at 3:00 AM PST
 - » User syncs runs at 4:00 AM PST

Exclusions

- Standard fields and OUs are supported in this integration. Custom Fields are not supported.
- The integration maps Cornerstone standard OUs to UKG Pro's Jobs, Locations and 3 out of 4 Organization levels.
- UKG Pro Employee APIs refresh every 3 hours. Hence, a force sync would not sync all users until the UKG Pro API is refreshed
- In Cornerstone, users can only belong to a single OU within the same OU type. Thus, UKG Pro implementations where a user belongs to multiple companies within the same organization are not supported.
 - » For example, let's say that a user belongs to multiple companies within the same organization in UKG Pro. In this case, UKG Pro sends Cornerstone multiple records for the same user. However, only one user record will be created in Cornerstone (i.e. no duplicate records will be created in Cornerstone).
- Existing users and OUs in Cornerstone prior to enabling the integration will only be updated if they exist in UKG Pro. The OU ID and User ID are used as identifiers.
- Time zone is not obtained
- User language preference is obtained from UKG Pro only when creating the user

Configuration

The following configurations need to be completed prior to enabling the integration:

- Time Zone Needs to be configured as a system property
 - Navigate to "Service Account Administration" (Menu > System Configuration > Service Account Administration)

MENU	•	MYSELF	MY TEAM ADMI	NISTRATION SYSTEM CO	ONFIGURATION	
*	Content Mar	nagement	System Settings	Security	Time & Attendance Setup	Talent I
	Gadgets		Employee Display	Security Dashboard User Administration	Integration Configuration Transaction History	Talent
⊠ Inbox	Platform Cor Platform Co Classes		Color Logo Reporting	Role Administration IP Filtering Web Services	Integration Customization IP Address Configuration	Time E Time
	Data Service Pages Labels	es	Auditing Compensation Settings PTO Benefit Plans	Service Account Administration Security Settings	Time Management Setup Integration Status Integration Configuration	Payroll
	Rules Benefits Enro	ollment	Year-End PPACA Reporting Settings	Multi-Factor Authentication Security Notifications	Federated SSO SSO Users	Deduc
	Content		Predictive Analytics Payroll Settings	Workflow Administration Workflow Summary	Setup Direct Login	Celer
			Record of Employment (ROE) Settings Organization Chart Settings Mobile App	Requests Out of Office Workflow Notifications	Taxes Employee Withholding Forms (W-4)	Learn Syster NetSi
			Business Rules	Business Processes	PA Tax Collection Districts Smart Tax Search	Autom

2. Add a new account by clicking "Add"

Security Dashboard	User Administration	Role Administration	IP Filtering	Web Services	Service Account Administration	Security Settings	Multi-Factor Auth
Service Acc	ount Admini	stration				edit labels	add B Pinn help
Customer API Key	JVZ01			Da			
Actions	• OK						
Find by User nam	e • starts with •	٠	- Search				
User Name 🛪		Status	Last Logon	1	Use	r API Key	¥

3. Populate the credentials and grant the below permissions

Web Service Permissions	Access
Company Configuration Integration	View
Employee Export	View

dd/Change Service Account			Security Notification < > Find	
Employee Termination				print ite
SUI Tax Rate				
Employee Process Hire				
Employee Self Service API				
Federated SSO User				
Third Party Pay Service	(iii)			
PPACA Filing				
Employee Onboarding Documents				
PTO Plan Integration		 		
Company Configuration Integration				
Employee Export	Tell	10	0	
Payroll Integration				
Personnel Integration				
Talent Integration				
Tax Integration				
Time Integration				
Deduction Integration				

4. Press the "Save" button to add the service account

Security Dashboard	User Administration	Role Administration	IP Filtering	Web Services	Service Account Administration	Security Set
Service Acc	ount Admini	stration				edit label
Customer API Key	24255					
Actions	▼ OK					
Find by User nam	e 🔻 starts with 💌	+	- Search			
User Name 🔺		Status	Last Logon		Use	er API Key
<u> </u>	<u>/C</u>	Active	10/11/2017 1	2:00:48 PM		(and showing)

- 5. Share the credentials with the Cornerstone administrator
- 6. Navigate to "Web Services" to identify your Tenant URL and Customer API Key In this image, the API Key is JVZ01 and Tenant URL is http://Servicet.ultipro.com

/ Dashboard	User Adm	inistration	Role Administration	IP Filtering	Web Services	Service Account Administration	Secu
Web Se	ervices						
User API Ke Customer Business Intelligence service end	API Key e web	JVZ01 http://Servic	et.ultipro.com, <mark>services/</mark>	/BIDataService			
Business Intelligence streaming	e report	http://Servic	et.ultipro.com/services/	/BiStreamingSen	vice		
Login servi endpoint	се	http://Servic	et.ultipro.com/services/	LoginService			

7. Navigate to "Display Settings" to identify the Organization Levels and their corresponding display name in UKG Pro In this image, Organization Level 1 is configured to be Division

imployee Displa	ay Color	Logo	Reporting	Auditing	Compensation Settings	PTO Benefit I	Plans Year-End	PPACA Reporting Settings	Predictive
Display Set	tings							edit labels edit	
Danish (DNK) Filipino (PHL) Italian (ITA) M. Swedish (SWE)	French (CAN)	French (FRA) German	n (DEU)	er droch				pro oup
Organization I	evel 1				Organ	ization Level	2		
Code	Div				Code	1	Dept		
Code length	6				Code le	ngth e	5		
Description	Division				Descrip	tion I	Department		
Organization L	.evel 3				Organ	ization Level	4		
Code	Region				Code	-	Team		
Code length	6				Code le	ngth (5		
Description	Region				Descrip	tion	Feam Lead		
Transfer of Em	ployee Docu	ments			Windo	w Title Settin	gs	_	
	ients to new co documents to				Hide En Sfer. Number		NO		

Edge Enablement

The integration can be self-installed in your CSX Stage or Pilot to support your testing exercise. When ready to move to Production, please reach out to your Cornerstone Client Executive to have the integration installed in your CSX Production portal.

1. Open the Edge Setting Page

≡ ¢ Edge	A their local
Back Utimate UltiPro Core Data Inbound Integration	
Settings Transaction History	
Please fill in the fields below to configure your integration.	
Setup Instructions	
Customer API Key* Tensent URL*	
Usemane * Password *	
Contact Email * Division: Organization Level 1 *	
Grade: Organization Lavel 2 •	
Cast Center: Organization Level 3 *	
Uver identifier: Employee ID •	
O- Delta Spic Now	
E Save Setting	4

- 2. Configure the Integration with:
 - Customer API Key UKG Pro user API key
 - **Tenant URL** UKG Pro service endpoints are made up of two parts: Tenant URL and resource path.
 - » The Tenant URL will be similar to https://servicet.UltiPro.com, but will vary by customer datacenter and production/test environment
 - Username UKG Pro service account username
 - **Password** UKG Pro service account password
 - **Contact Email** Where notifications including the synchronization status and errors will be sent (multiple emails should be comma separated)
 - **Grade & Cost Center** Each can be mapped to an UKG Pro organization level. If configured, mapped values should differ, otherwise set to None
 - **Division** Must be mapped to an UKG Pro organization level. The value should be different from Grade & Cost Center mapped values

- User Identifier: Populates the User ID with UKG Pro's Employee ID or EmployeeNumber
- Full Sync Now Forces a one-time transfer of all OU and User Records from UKG Pro to Cornerstone
 - » <u>CAUTION</u>: This expensive and demanding process is recommended to be completed after working hours
- **Delta Sync Now** Forces a one-time transfer of OU and User Record changes from UKG Pro to Cornerstone
- OU Mapping Notes Select a corresponding Organization Level from the 4
 possible values. Each OU should have its distinct organizational level (note: The OUs
 that can be mapped include Division, Grade and Cost Center. Location and Position
 default to UKG Pro's Location and Job.)

cornerstone

Hello,

Thank you for configuring Ultimate UltiPro Core Data Sync Integration. Kindly be informed that the integration verification was successful.

*** This is an automatically generated email. Please do NOT reply to this email as this address is not monitored.***

- 4. Once settings are saved, the integration verifies the credentials and emails its result
- 5. Enable the integration

Implementation

The below permission applies to this functionality.

Permission Name	Description
Edge Integrations - Manage	Grants access to the Integrations service for Edge Integrate where the administrator can configure, enable, and disable their third-party integrations that are used within the Cornerstone system. This permission cannot be constrained. This is an administrator permission.
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained.
Universal Profile – User Record – View Users	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.

Workflow

OU Sync Workflow

OU Sync Workflow: Creating an entity in UKG Pro

Entities represent any of the following: Location, Job, Organization Level 1, Organization Level 2, Organization Level 3, and organization Level 4

1. Navigate to "Business Rules"

(Menu > System Configuration > Business Rules)

ENU 🤎 MYSELF
Content Management Gadgets Platform Configuration Classes Data Services Pages Labeis Rules Benefits Enrollment Content

2. Search for an entity. The image shows an example of searching for Locations.

Business Rules		edit labels pri
Role Administrator	Da	
Actions OK +		
Find by Name Starts with Location Filtered by Name - starts with Location <u>(Clear Filters)</u>	• Search	
Name 🔺	Description	
Location Report Category	Define or modify Location Report Category	
Locations	Define or modify locations for employees.	

3. Select the entity to display the existing values

ocations		4	editiates back add pirm b	9
Find by Status Filtered by State	is Active Active	Search	Deplaying 1-50 of 100 reco	eds
Code =	Description	Salary Differential	Location Country	\$
ALBUQ	Albuquerque, NM	None	United States	
ATLANT	Atlanta, GA	None	United States	
AURORA	Aurora, CO	None	United States	
AUSTIN	Austin, TX	None	United States	
BALT	Baltimore, MD	None	United States	
BATONE	Baton Rouge, LA	None	United States	
BCSFKL	Kansloops, BC	None	Canada	
BCSFVC	Victoria BC	None	Canada	
DISMRK	Bismarck, ND	None	Rinhed States	
BOISID	Boise, ID	None	United States	
NOTON	Boston, MA	None	United States	
BRAZIL	San Paulo, BR	None	Bruzil.	
CANTON	Canton, TX.	TX - Tiesas Differential (203.00 %)	United States	
CHARLO	Charlotte, NC	None	United States	

4. Press the add button and populate the entity information, then press the "save" button

.dd/Chang	d/Change Location			edit labels P
Details				
Location country		United States		
Code	٠	CHICAG		
Description	•	Chicago, IL	¢	
irade name		Eastwood Industries	¢	
3ank				
GL segment		310	1	
mport code		02605		
nactive		as of MM/DD/YYYY	-	
Reporting category		North •		

- 5. When the integration is triggered, the OU is created in Cornerstone based on the configured mapping
- 6. Once sync is complete, a status email is sent to the email(s) defined in the Settings page

OU_SYNCHRO	DNIZATIO				
orne	rstone				
ello					
		ata lab aund l	stagration This appails	rouides the statu	1005)
	g Ultimate UltiPro Core Da UltiPro to Cornerstone	ata Inbound II	ntegration. This email p	rovides the statu	s for
hank you for usin yncing OUs from				rovides the status	s for
hank you for usin yncing OUs from OU Type	UltiPro to Cornerstone		ntegration. This email p Updated	Failed	s for
hank you for usin	UltiPro to Cornerstone		Updated	Failed	5313650

7. Log into Cornerstone and validate the created OU

n Learning	Performance	Succession	Recruit	ш	Content	Reports	Admin	Integratio	n Suite	
Organizational U	inits.									
Manage L	ocation 🛛									
Build the hierarchy o	f organisational uni	ts.								
Select Organizati	onal Unit									
Location	* 0									
Location										
+ Add Location	> View Hierarchy									
Location	Location	ID								
			Q Search							
Include inactiv	e									
Title 🗘		ID≑			Active			Optio	ns	
Chicago		CHICAG			Yes			**	8	
Westin Hotel - Chic	ago	westinchgo			Yes			-	8	
										(7 Results)
Back										

OU Sync Workflow: Updating an Entity in UKG Pro

- 1. Go through the first 3 steps of "Creating an Entity in UKG Pro"
- 2. Select the entity to update
- 3. Existing OU is updated in Cornerstone based on the configured mapping
- 4. A status email is sent to the email list configured in the Settings page
- 5. Log into Cornerstone and validate the OU

User Sync Workflow: Creating an Employee/User in UKG Pro

 Navigate to "My Employees" (Menu > Administration > My Employees)

aministrato	r Guide My Er	nployees Employee		Acknowledgments			PTO Reques		
My Em	ployees							•	0
Role Administrat	tor •								
Find by	first name	• starts w	ith •	æ	_ Search	6			
FI	Itered by First na	me - starts with <u>IClear Fi</u>	tersi						
Actions		• ок в э							
Name =	Employee Number	Primary Work Phone	Extension	Primary Home Phone	Primary E-Mail	Status	Job	Location	Division
Networks and the		(512) 227-9910	12208	(903) 297-5216	Jose Abbott@ultimate.com	Active	External	Canton TX	Manufa
Abbott. Jose	262352135	(315) 551-3410					Maintenance		Manura
	202352135	(646) 224-1818	3214	(212) 290-7878	Herbert Adams@ultimate.com	Active		New York NY	Adminie
Jose Adams,				(212) 290-7878 (512) 298-9310	Herbert Adamspultimate.com John Adamspultimate.com		Maintenance Talent	New York	
Jose Adams, Herbert Adams,	000012409	(646) 224-1818	3214			Active	Mantenance Talent Administrator Internal	New York NY	Adminie

2. Press the "add" button, use the wizard and populate the user information, then press the "save" button

ly Emp	ioy	ees			20	id print bein	Things I Can Do
				Hire an Employee			Add Employee (Hire/Rehire)
Find by La	st nar						Add Canadian Employee (Hire/Rehire/Mult
Filte		Hire an Employee Heather Smith - UEL Co			UltiPro	20 of 121 re	Company Hire) Add Global Employee
Actions		Start	Summary			0	Quick Tours and Tips
lame 🔿	Em	Personal	Request Info		back next save cancel print Show All fields	Supervisor	Human Resources – Resources for Managers
ames.	40	Dates	Start	mauon	Show Mineus	Garrett, Robert	UltiPro Navigation Overview
		Jobs/Payroll		Before	Submitted	- Nobert	Search with Filters Tour Modify Search Results Tour
bella. Jeri	00	Direct Deposit	Company	New	UEL Corporate	Garrett. Robert	Hire/Rehire an Employee in the U.S. Tour
		Federal Income Tax	Operating country	New	United States		Hire a Global Employee Tour Update Global Employee Information Tou
bella, Jeri	40	State Taxes	Prefix	New		Garrett. Robert	
		PTO/Leave Balances	First	New	Heather		
iamuel T.	40	Summary	Preferred name	New	Heather	Gerlikas, Edward	
llan-	40		Middle	New		Adams.	
Aorris, Aaribeth	40		Last	New	Smith	Samuel	
livarado.	40		Former last	New		Lopez,	
Aichelle C.	10		Suffix	New		Jose	
more	00		Employee number	New	To be assigned	Tolle,	
Jones), Sophia			Time clock	New		Meghan	

- 3. Once sync is complete, new employee/user is created in Cornerstone
- 4. A status email is sent to the email(s) defined in the Settings page

	Tue 12/26/2017 11:55 AM					
	integrationcenter@	@csod.com				
	user synchronization sun	nmary				
If there are pr	oblems with how this message is	s displayed, click here to vi	ew it in a web brows	er.		
COMM	nerstone					
POLI						
Hello,						
Hello,	for using Ultimate UltiPro	o Core Data Inbound	I Integration. T	his email pr	rovides the statu	us foi
Hello, Thank you t			Integration. T	his email pr	rovides the statu	us for
Hello, Thank you t sycing users	for using Ultimate UltiPro s from UltiPro to Corners	stone		his email pr	rovides the statu	us foi
Hello, Thank you t	for using Ultimate UltiPro		Integration. T	his email pr	rovides the statu	us foi

5. Log into Cornerstone and validate user record

Heather Smith	Bio 🔻 Feed	oack Transcript	Actions 🔻	Snapshot	User Record 🔻	
	Today 5/23 2018					
		Name: Heather Smith User ID: 1000020 Original Hire Date: Allow Reconciliation: N Active Status: Active	lo		User Name: hamith@uelcorp.com Local System ID: Last Hire Date: Absent: No	
	Contact				Pk	~
Back						

User Sync Workflow: Updating an Employee/User in UKG Pro

- 1. Navigate to "My Employees" Menu > Administration > My Employees
- 2. Select the employee/user, update the information, and press the "save" button
- 3. Existing employee/user is updated in Cornerstone
- 4. A status email is sent to the email list configured in the Edge Settings page
- 5. Log into Cornerstone and validate the employee/user

Appendix

A. OU Mapping

Summary

Cornerstone	UKG Pro
Position	Job
Location	Location
Division	Configurable Values:
Grade	Configurable Values: • org-levels1 • org-levels2 • org-levels3
Cost Center	 org-levels4

Position

Cornerstone Field Name	Required	Values	UKG Pro Field Name
OU Name	Yes		title
OU ID	Yes		Job Code
Active	No	true / false	isActive

Location

Cornerstone Field Name	Required	Values	UKG Pro Field Name
OU Name	Yes		description
OU ID	Yes		locationCode
Active	No	true / false	isActive
Country	No		countryCode
City	No		city
State/Province	No		state
Postal Code	No		zipOrPostalCode

Grade, Division, and Cost Center

Cornerstone Field Name	Required	Values	UKG Pro Field Name
OU Name	Yes		title
OU ID	Yes		Job Code
Active	No	true / false	isActive

B. User Mapping

Cornerstone Field Name	Required	Values	UKG Pro Field Name	Comments
Userid	No		Employee Number	Configurable: Employee Id or Employee Number
Active	No	true/false	true/false	
Prefix	No		Prefix	
First Name	Yes		firstName	
Middle Name	No		middleName	
Last Name	Yes		lastName	
Suffix	No		suffix	
Username	Yes		Employee Number	
Email	No		emailAddress	
Work Phone	No		workPhone	
Home Phone	No		homePhone	
Country Code	No		CountryCode	
Address Line 1	No		employeeAddress1	
Address Line 2	No		employeeAddress2	
City	No		city	
State/Province	No		state	
Zip Code	No		zipCode	
Required Approvals	Yes	Defaults to 1	Defaults to 1	
Original Hire Date	No		hireDate	
Manager ID	No		supervisorID	
Gender	No	male/female	male/female	
Language	No		languageCode	Culture ISO Code. 14 languages. <u>https://connect.ultipro.</u> <u>com/employee-export- FAQ</u>
Location	Yes		workLocationCode	Referred to as tax location
Position	Yes		jobCode	
Division	Yes		organization level1	Configurable: organization level 1,2,3,4
Grade	No		organization level2	
Cost Center	No		organization level3	