



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



# Table of contents

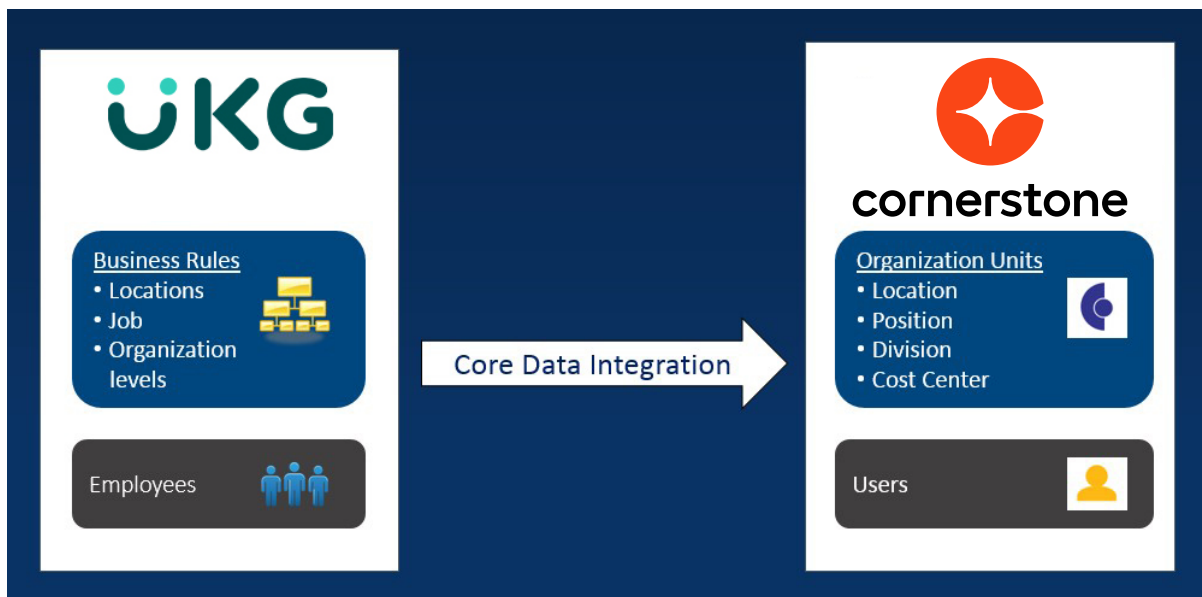
<b>Overview</b>	<b>3</b>
Key Integration Details	4
Exclusions	4
<b>Configuration</b>	<b>5</b>
Edge Enablement	8
<b>Implementation</b>	<b>10</b>
<b>Workflow</b>	<b>11</b>
OU Sync Workflow	11
<b>Appendix</b>	<b>17</b>
A. OU Mapping	17
B. User Mapping	19

# Version history

VERSION	DATE	DESCRIPTION
1.0	05/24/2018	<ul style="list-style-type: none"><li>• Document creation</li></ul>
2.0	06/28/2018	<ul style="list-style-type: none"><li>• Updated the navigation to “Service Account Administration”</li></ul>
3.0	02/03/2020	<ul style="list-style-type: none"><li>• Updated Exclusion section to provide clarification on fourth bullet point</li></ul>
4.0	Nov 4, 2020	<ul style="list-style-type: none"><li>• Updated for UKG rebranding</li></ul>

# 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.

# Key Integration Details

- This is a one-way, inbound synchronization from UKG Pro to Cornerstone
- Users can login to Cornerstone via Single 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

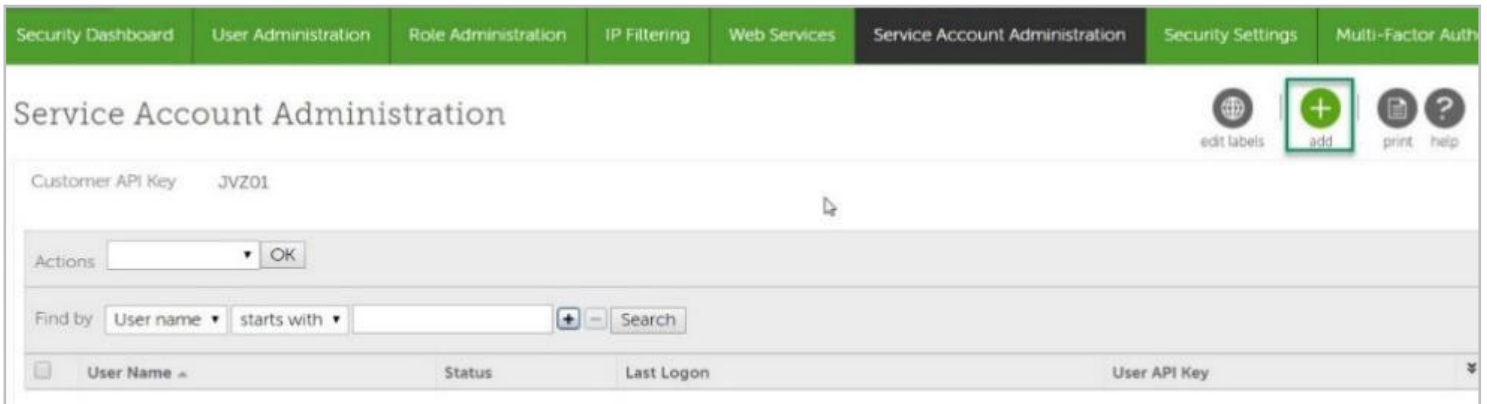
# Configuration

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

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

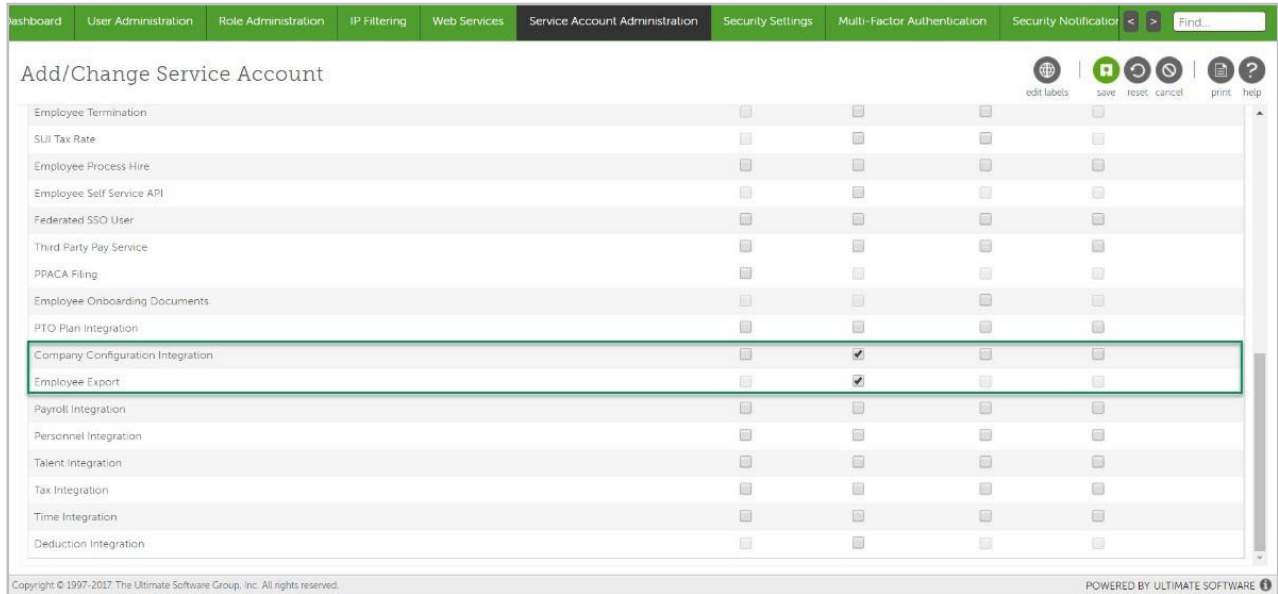


2. Add a new account by clicking “Add”

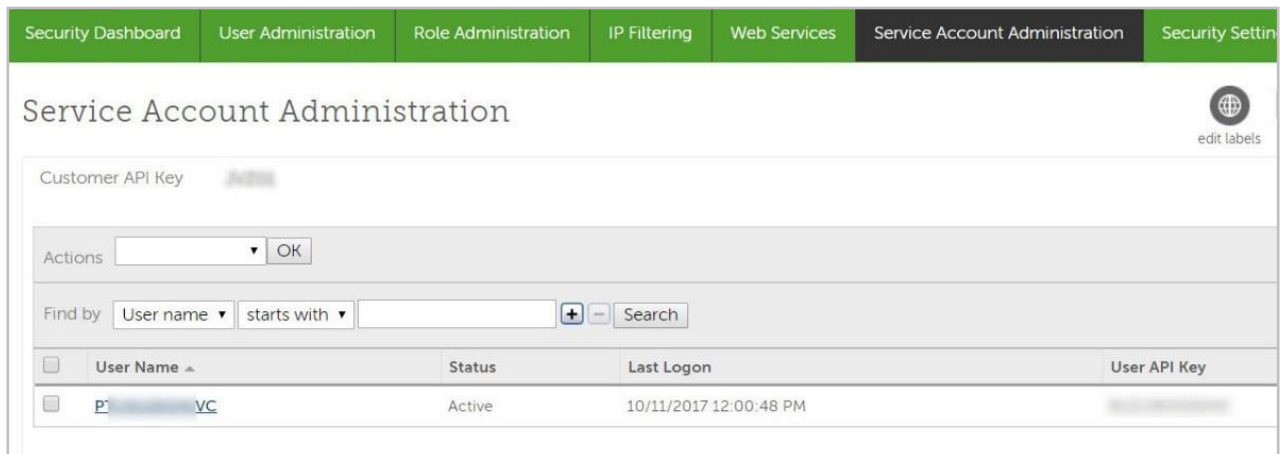


3. Populate the credentials and grant the below permissions

Web Service Permissions	Access
Company Configuration Integration	View
Employee Export	View



4. Press the “Save” button to add the service account



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 Administration | Role Administration | IP Filtering | **Web Services** | Service Account Administration | Security

## Web Services

User API Key [REDACTED]

Customer API Key **JVZ01**

Business Intelligence web service endpoint **http://Servicet.ultipro.com/services/BIDataService**

Business Intelligence report streaming endpoint http://Servicet.ultipro.com/services/BiStreamingService

Login service endpoint http://Servicet.ultipro.com/services/LoginService

- 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*

Employee | **Display** | Color | Logo | Reporting | Auditing | Compensation Settings | PTO Benefit Plans | Year-End | PPACA Reporting Settings | Predictive

## Display Settings

edit labels | edit | print | help

Danish (DNK) | Dutch (NLD) | English (CAN) | English (GBR)  
 Filipino (PHL) | French (CAN) | French (FRA) | German (DEU)  
 Italian (ITA) | Malay (MYS) | Portuguese (BRA) | Spanish (USA)  
 Swedish (SWE)

Organization Level 1		Organization Level 2	
Code	Div	Code	Dept
Code length	6	Code length	6
Description	Division	Description	Department
Organization Level 3		Organization Level 4	
Code	Region	Code	Team
Code length	6	Code length	6
Description	Region	Description	Team Lead

Transfer of Employee Documents

Copy documents to new company during employee transfer.  
 Do not copy documents to new company during employee transfer.

Window Title Settings

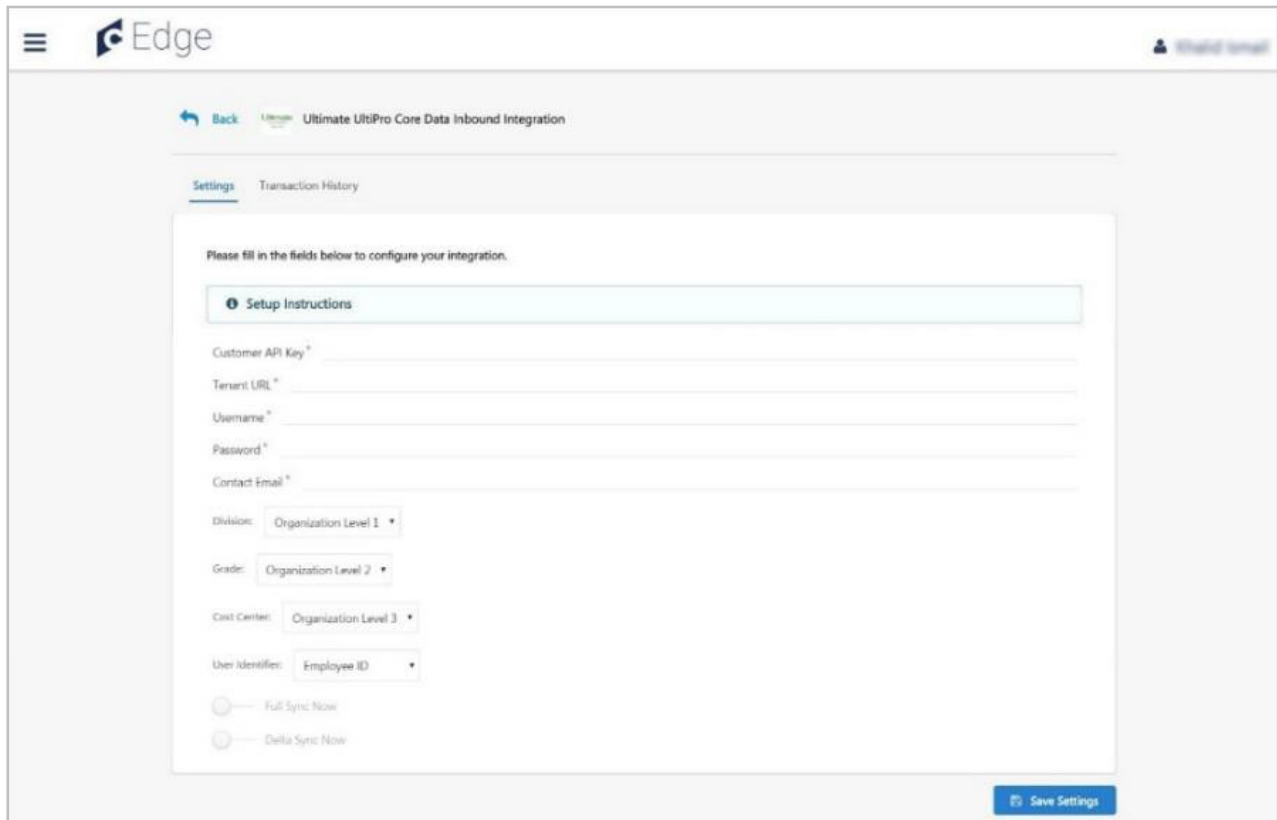
Hide Employee Number  NO



# 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



The screenshot shows the 'Edge' application interface. At the top left is a hamburger menu icon and the 'Edge' logo. At the top right is a user profile icon labeled 'Michael Smith'. Below the header, there is a navigation bar with a 'Back' button and the text 'Ultimate UltiPro Core Data Inbound Integration'. Underneath, there are two tabs: 'Settings' (which is active) and 'Transaction History'. The main content area contains a form titled 'Please fill in the fields below to configure your integration.' The form includes a 'Setup Instructions' section, followed by input fields for 'Customer API Key', 'Tenant URL', 'Username', 'Password', and 'Contact Email'. Below these are dropdown menus for 'Division' (set to 'Organization Level 1'), 'Grade' (set to 'Organization Level 2'), 'Cost Center' (set to 'Organization Level 3'), and 'User Identifier' (set to 'Employee ID'). At the bottom of the form are two radio buttons: 'Full Sync Now' and 'Delta Sync Now'. A 'Save Settings' button is located at the bottom right of the form.

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
  - » **CAUTION:** 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.)



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.

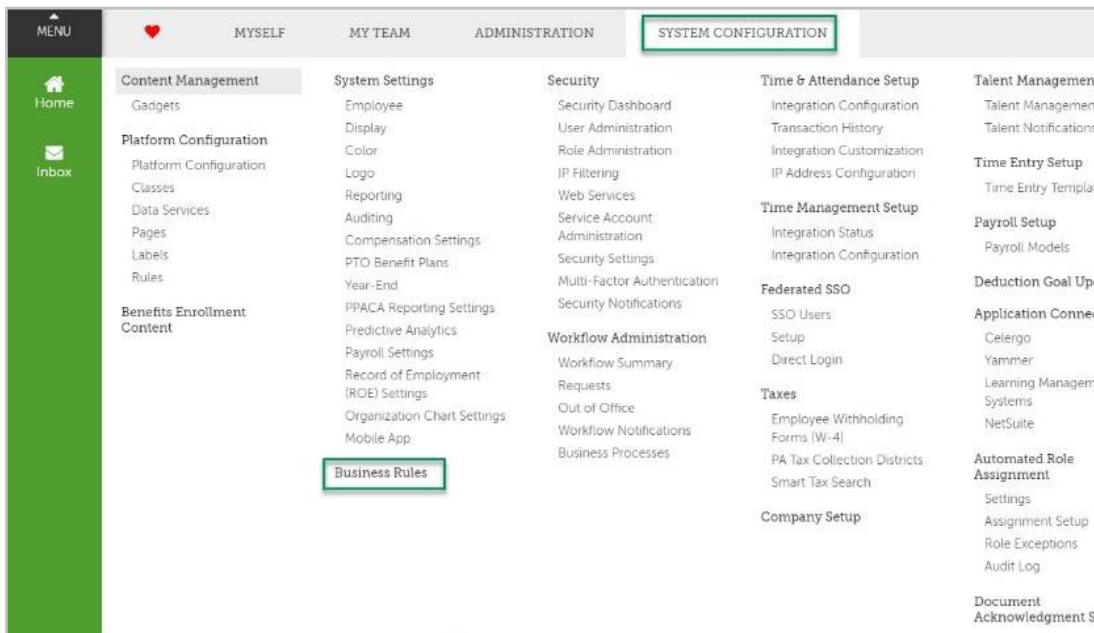
# Workflow

## 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)



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

Business Rules

Role: Administrator

Actions:  OK

Find by: Name starts with Location    Search

Filtered by: Name - starts with Location [\[Clear Filters\]](#)

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

Locations

Find by: Status is Active   Search

Filtered by: Status - is Active [\[Clear Filters\]](#)




Displaying 1-50 of 100 records

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
BATONB	Baton Rouge, LA	None	United States
BCSEKL	Kamloops, BC	None	Canada
BCSPVC	Victoria, BC	None	Canada
BISMRK	Bismarck, ND	None	United States
BOISID	Boise, ID	None	United States
BOSTON	Boston, MA	None	United States
BRAZIL	San Paulo, BR	None	Brazil
CANTON	Canton, TX	TX - Texas Differential (03.00 %)	United States
CHARLO	Charlotte, NC	None	United States

Copyright © 1997-2017 The Ultimate Software Group, Inc. All rights reserved.

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

## Add/Change Location

---

**Details**

Location country: United States

Code: CHICAG

Description: Chicago, IL

Trade name: Eastwood Industries

Bank:


GL segment: 310

Import code: Q2605

Inactive:  as of


Reporting category: North


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



**Ou synchronization summary**

---


OU\_SYNCHRONIZATIO...  
683 bytes



Hello,

Thank you for using Ultimate UltiPro Core Data Inbound Integration. This email provides the status for syncing OUs from UltiPro to Cornerstone

OU Type	Added	Updated	Failed
Position	5	5	5
Grade	1	1	1
<b>Summary</b>	<b>6</b>	<b>6</b>	<b>6</b>

Synchronization Id: 411ea103-9e23-42a0-80b8-23384d84b577

\* This is an automatically generated email, please do not reply to this email.

7. Log into Cornerstone and validate the created OU

Organizational Units

## Manage Location

Build the hierarchy of organisational units.

Select Organizational Unit

Location

Location

+ Add Location > View Hierarchy

Location Location ID Search

Include inactive

Title	ID	Active	Options
Chicago	CHICAG	Yes	
Westin Hotel - Chicago	westinchgo	Yes	

(2 Results)

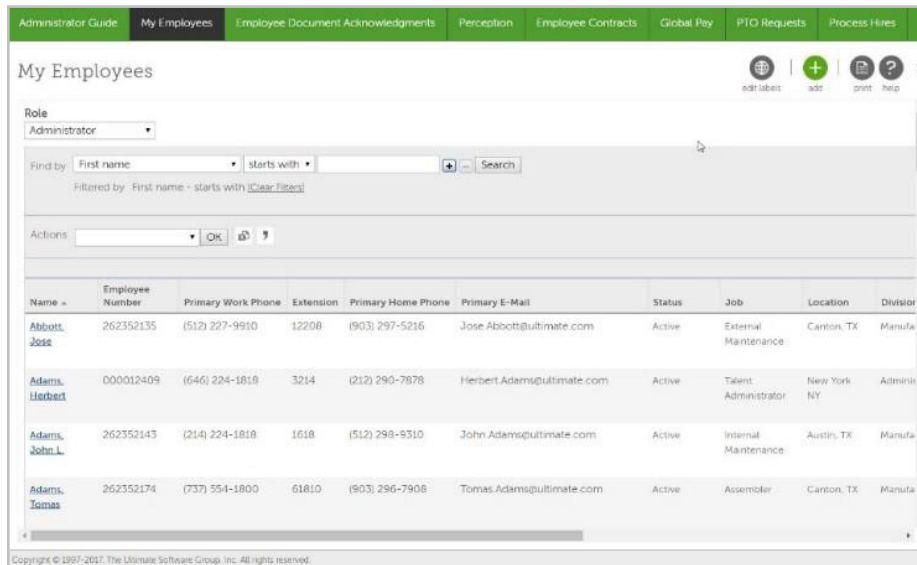
Back

# OU Sync Workflow: Updating an Entity in UKG Pro

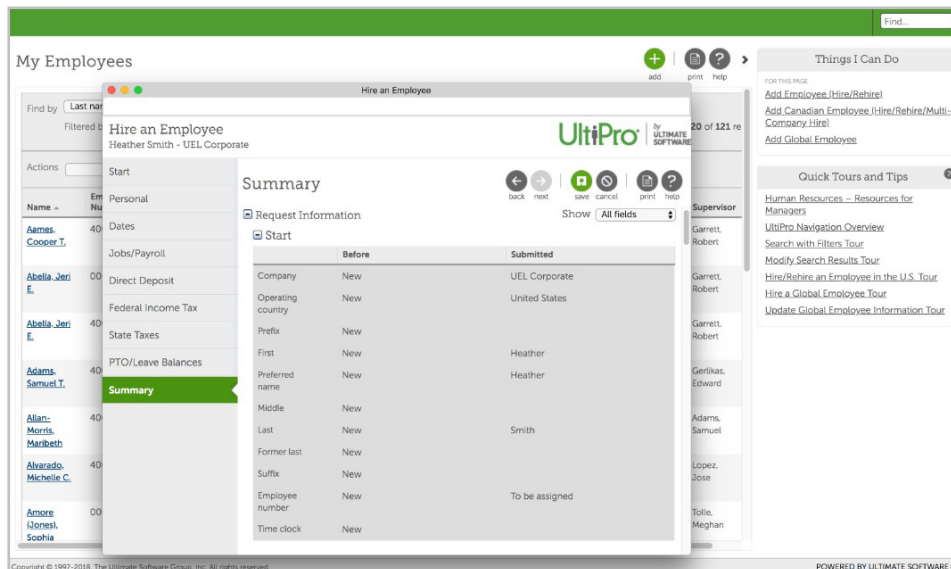
1. Go through the first 3 steps of “Creating an Entity in UKG Pro”
2. Select the entity to update
3. Existing OU is updated in Cornerstone based on the configured mapping
4. A status email is sent to the email list configured in the Settings page
5. Log into Cornerstone and validate the OU

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

1. Navigate to “My Employees”  
(Menu > Administration > My Employees)

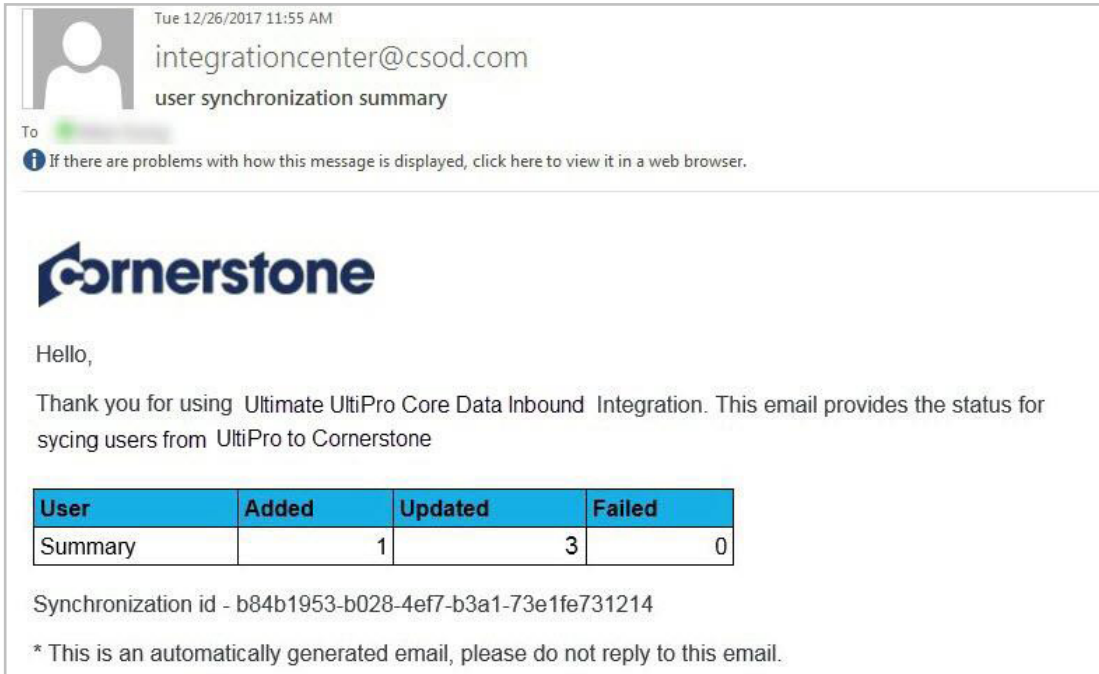


2. Press the “add” button, use the wizard and populate the user information, then press the “save” button

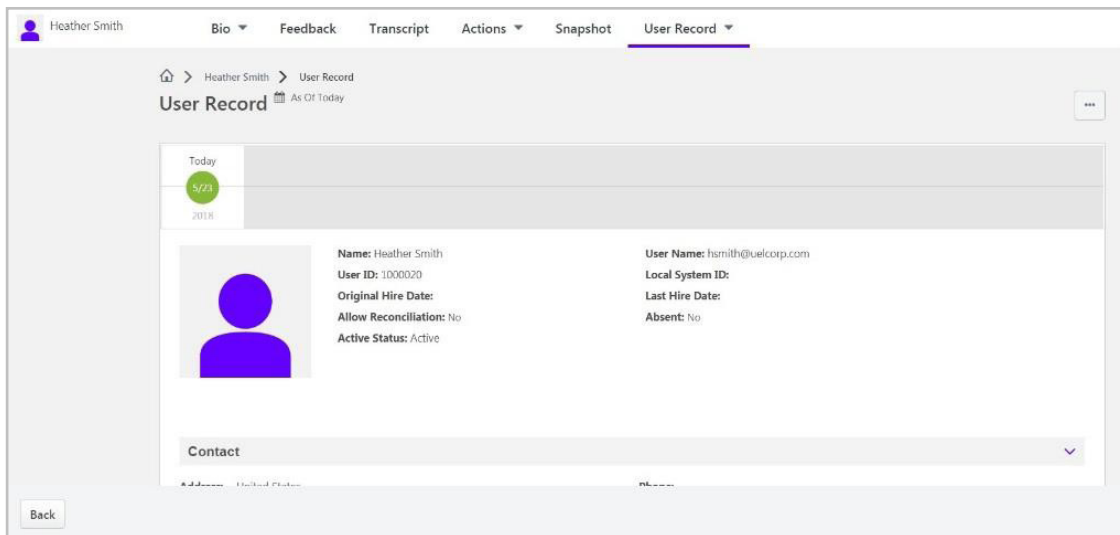




3. Once sync is complete, new employee/user is created in Cornerstone
4. A status email is sent to the email(s) defined in the Settings page



5. Log into Cornerstone and validate user record



## 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: <ul style="list-style-type: none"><li>• org-levels1</li><li>• org-levels2</li><li>• org-levels3</li><li>• org-levels4</li></ul>
Grade	
Cost Center	

### 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. <a href="https://connect.ultipro.com/employee-export-FAQ">https://connect.ultipro.com/employee-export-FAQ</a>
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	