UKG Pro
Position Automation Guide

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Contents

Position Automation Overview

The UKG Pro Position Automation feature enables administrators to manage positions, employees, and associated jobs to facilitate vacancy and headcount management within organizations. Access to real-time workforce data enables administrators to track the status of vacant, filled, and overstaffed positions.

Positions are defined as seats in your organization. Seats are organized based on org levels, and may include division, region, and department. The status of seats is tracked over time providing an accurate view of vacancies and valuable insights for real-time workforce analytics.

A job refers to full or part-time paid work that requires skilled or unskilled workers. There can be multiple positions for a job, but not multiple jobs for a position. A person refers to an employee in your organization.

Term	Description	Example
Position	Refers to a seat in your organization that is independent of an employee.	Nursing Supervisor II is a current position in your organization
Job	Refers to full- or part-time paid work that requires skilled or unskilled workers. The job facilitates the placement of a person in a position.	Jane Doe has the job of RN and the position of Nursing Supervisor II
Person	Refers to an employee in your organization.	Jane Doe is a current employee in your organization

Activate and Configure UKG Pro Position Automation

UKG Pro Position Automation is activated and configured by following a three-step process.

System administrators must:

1. Activate Position Automation at the primary company level.
2. Enable web access rights for user roles.
3. Access Position Automation and configure general position settings.

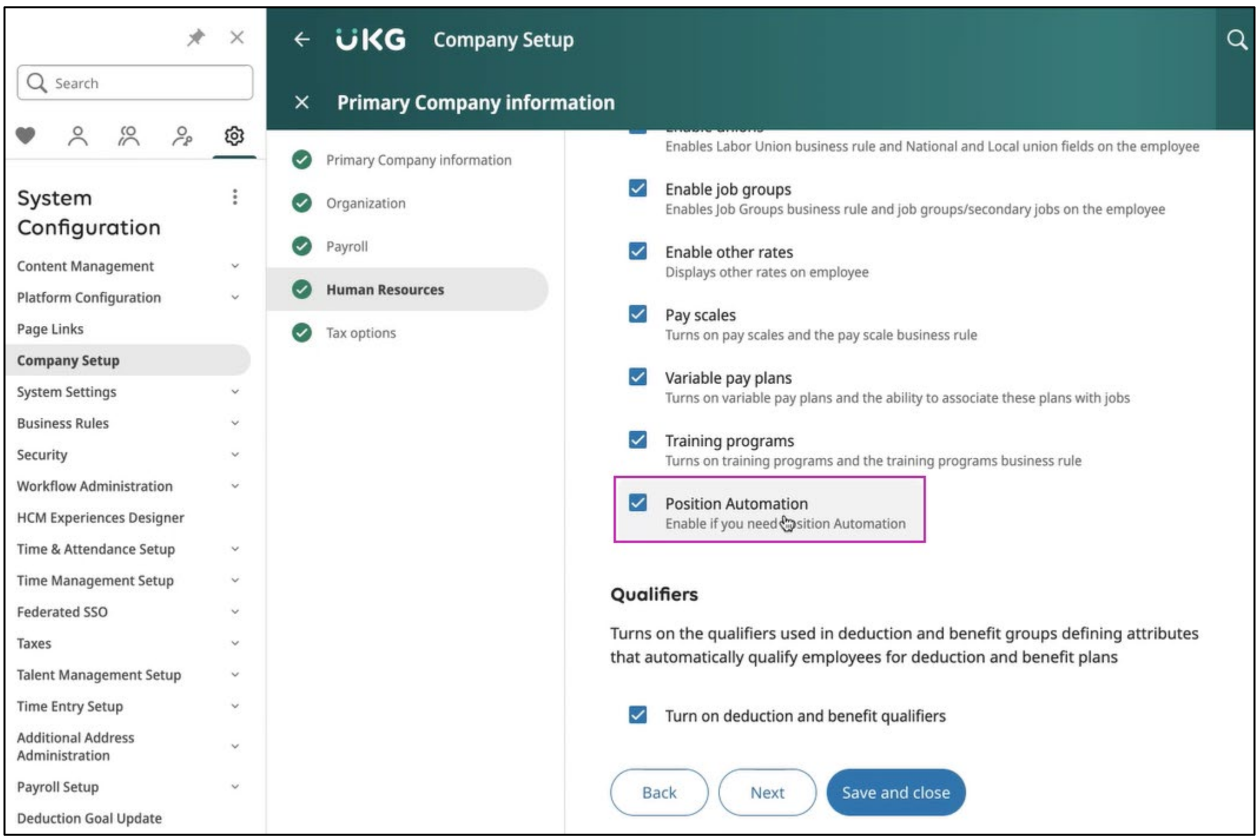
Once administrators activate and configure UKG Pro Position Automation, they can start adding positions.

Activate UKG Pro Position Automation

Activate the UKG Pro Position Automation feature in the Human Resources section of the Primary Company Setup page.

Navigation: Menu > System Configuration > Company Setup

1. From the **Primary Company** section, select **View all details**.
   The Master Company Setup page appears.
2. From the **Primary Company Information** page, select the **Human Resources** tab and navigate down the page to the **Options** section.
3. From the **Options** section, select the **Position Automation** checkbox to enable Position Automation.



Note: The Position Automation option is not available for customers using Position Management (also known as Positions).

4. Select **Save and Close**.
   A message displays: Are you sure? Editing your company setup may impact your tax filing, payroll settings, or reports.

5. Select **Save**.
   When saving is complete, administrators can enable web access rights for users.

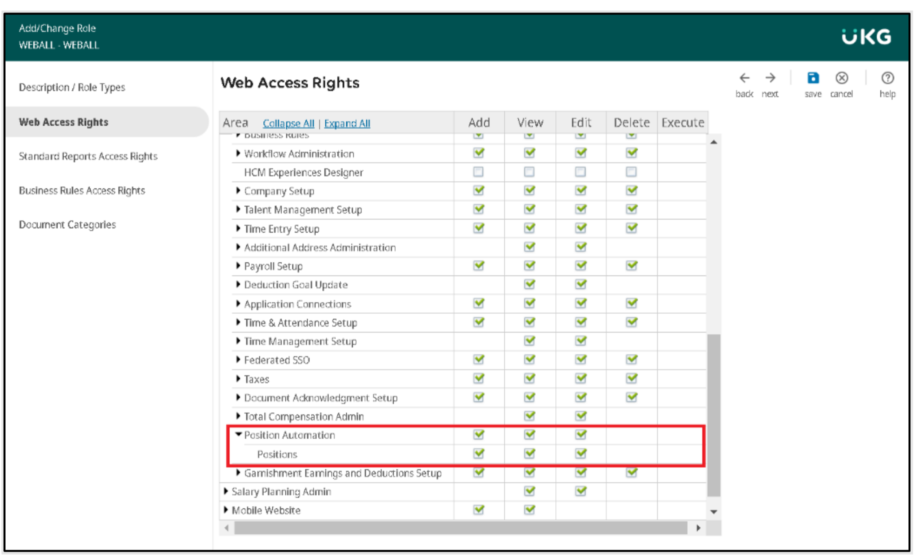
   Note: Once Position Automation is activated, system administrators cannot deactivate it. To deactivate Position Automation, submit a support case with the following issue summary: Position Automation – deactivate feature request.

Enable Web Access Rights to Position Automation

System administrators can enable web access rights to the Position Automation feature using role-based security. Web access rights are managed on the Role Administration page.

Navigation: Menu > System Configuration > Security > Role Administration

1. From the Role Administration page, complete one of the following:
   a. To add a role, select Add and enter the role name and description.
   b. To edit an existing role, in the Description column, select the appropriate role link.
   The Description/Role Types page appears.
2. In the Role Type grid, select the System Administrator role type to ensure access to the System Administration menu in UKG Pro and then select **Save**.
3. From the Web Access Rights page, expand System Configuration and then expand Position Automation.
4. Assign access rights to Positions:
   a. Check the **Add** box to enable add rights.
   b. Check the **View** box to enable view-only rights.
   c. Check the **Edit** box to enable edit rights.
5. Select **Save**.

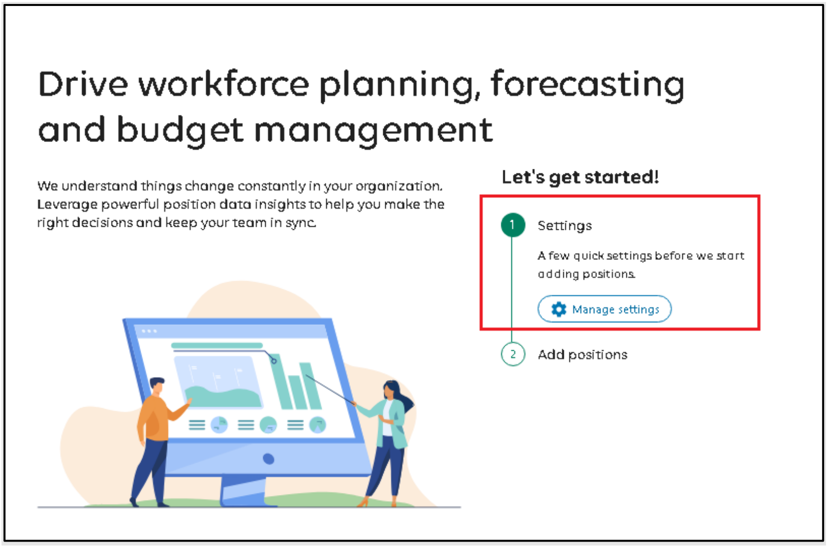


Access Position Automation and Manage Settings

When accessing Position Automation for the first time, administrators are prompted to activate a service account and configure settings to fit their organizational needs.

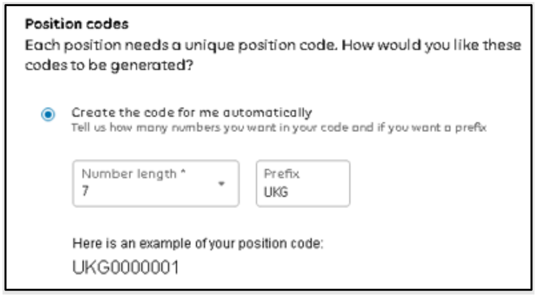
Navigation: Menu > System Configuration > Position Automation > Positions

1. From the Position Automation page, in the Let's Get Started section, select **Manage Settings**.



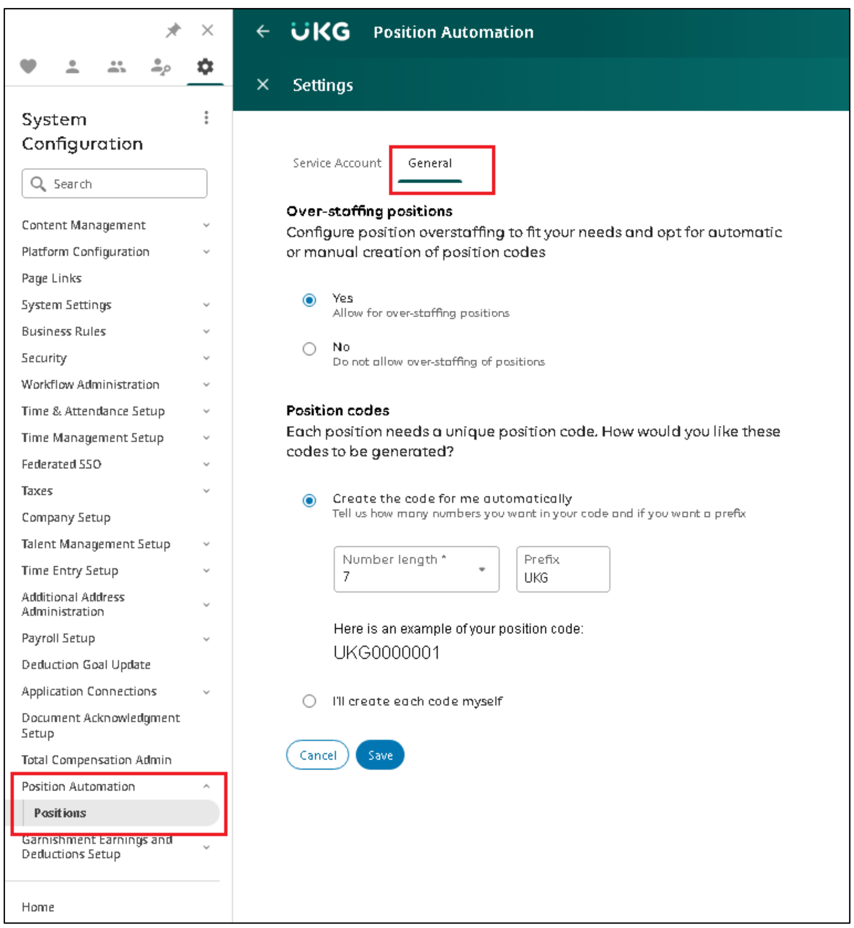
2. On the **General** tab, in the **Over-Staffing Positions** section, select to allow or disallow over-staffing.
   - Select **Yes** to allow administrators to overstaff all positions.
     A warning message appears when a position is overstaffed.
   - Select **No** to prevent administrators from overstaffing positions.
     An error message appears when a position is overstaffed.
3. In the General tab, in the Position Codes section, select to generate position codes automatically or manually.
   - Select **Create the code for me automatically** to generate position codes are automatically for new positions based on the length and prefix you define.
     - **Code Length**: Defines the required position code length from 5 to 9 characters.
     - **Prefix**: Defines the number of alpha characters (up to 5) to use as an optional prefix before the numeric part of the position code.

- Based on the defined length and prefix, an example of the position code appears. Review the example and make any changes before saving.



Note: The defined code structure's number length and prefix are used to auto-generate the position codes for all positions, including positions that are imported.

- **I'll create each code myself.** Position codes are manually generated. Administrators enter a code for one or more positions in any structure based on the defined code length and prefix.



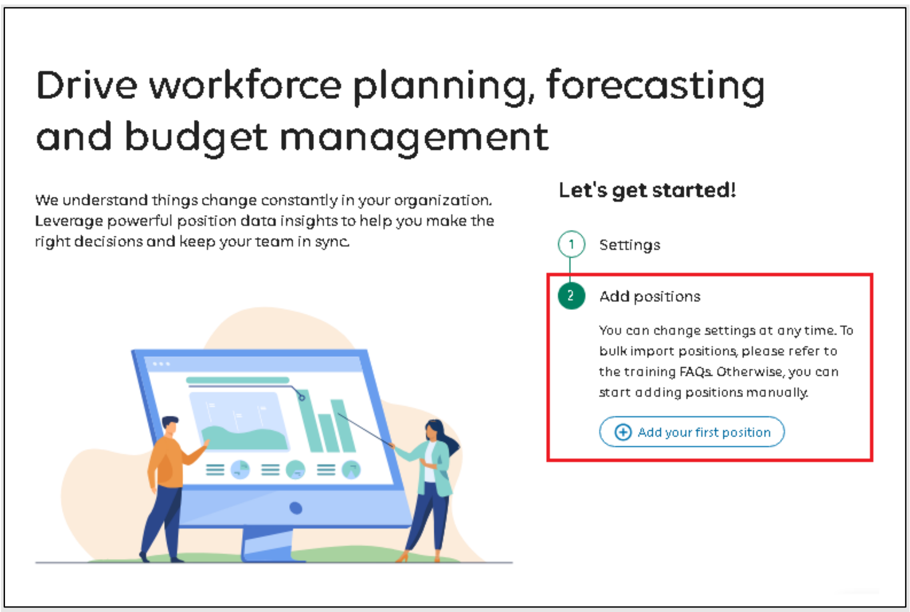
4. Select **Save**.
   The activation process begins and takes up to 24 hours to complete.

5. Review the message that appears and complete related action:
   In progress message – Select the Refresh link to refresh the page and then select Add your first position button.

Important: After saving the settings, administrators can proceed with adding a position. Once a position is added, administrators cannot modify the settings that were configured for over-staffing and position codes.

Add Positions

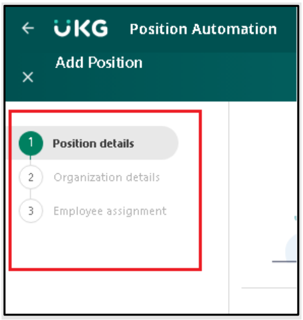
Once system administrators activate and configure Position Automation, you can start to add your first position.



Important: Depending on the activation status, one of the following messages displays.
Pending - The service account activation is pending. Please click here to refresh
Success – The service account activation process is complete.
Failure – The service account activation process failed. Follow the steps to reactivate the process or create a support ticket.

Adding a position is a three-step process that includes:

1. Adding position details.
2. Adding organization details.
3. Making employee assignments.



Navigation: Menu > System Configuration > Position Automation

1. From the **Let's Get Started!** section, select **Add Your First Position**. Positions can also be added via the Position Insights page.
2. From the **Add Position Details** page, complete the position detail fields.

Field Name	Description
Position name*	Refers to the name of the position.
Job*	Refers to the name of the job. Select from the list of available jobs.
Position code*	Refers to the code associated with the position. The position code is generated automatically or manually based on the pre-defined settings. • If automatically generated, the code is visible, but cannot be modified. • If manually generated, the administrator must enter the code.
Alternative position number	Refers to an alternative position number used by the organization.
Position FTE*	Indicates the position FTE value. By default, the field has a value of 1 and can be updated to an FTE value between 0.01-999999 (with up to two decimal places).
Position status*	Indicates the position's status. By default, the field is active and can be marked inactive by checking the checkbox.
Approved	Indicates whether the position has been approved. By default, this field is unapproved. Select to indicate the position has been approved. **Note**: After the position is approved, the action cannot be reversed

Field Name	Description
Notes	Provides an area to add any additional notes for the position.
Reports to position	Refers to the position to which this position will report. Select a position from the menu. The list includes active and approved positions.

3. Select **Next** to start the process. During the process, the field data is validated. Important: The administrator must correct field data issues described in validation messages before proceeding.

4. Select **Next** to add the organization details.

Field Name	Description
Component Company*	Refers to the name of the component company under the master company. Select from the list of available component companies.
Org Level 1 - 4	Refers to the name of the organizational level configured in UKG Pro that is associated with the position. Select from the list of available options.
Location	Refers to the name of the location. Select from the list of available locations. The options available in the list will be based on the selected component company
Project	Refers to the name of the project. Select from the list of available projects.
Shift	Refers to the name of the shift. Select from the list of available shifts.

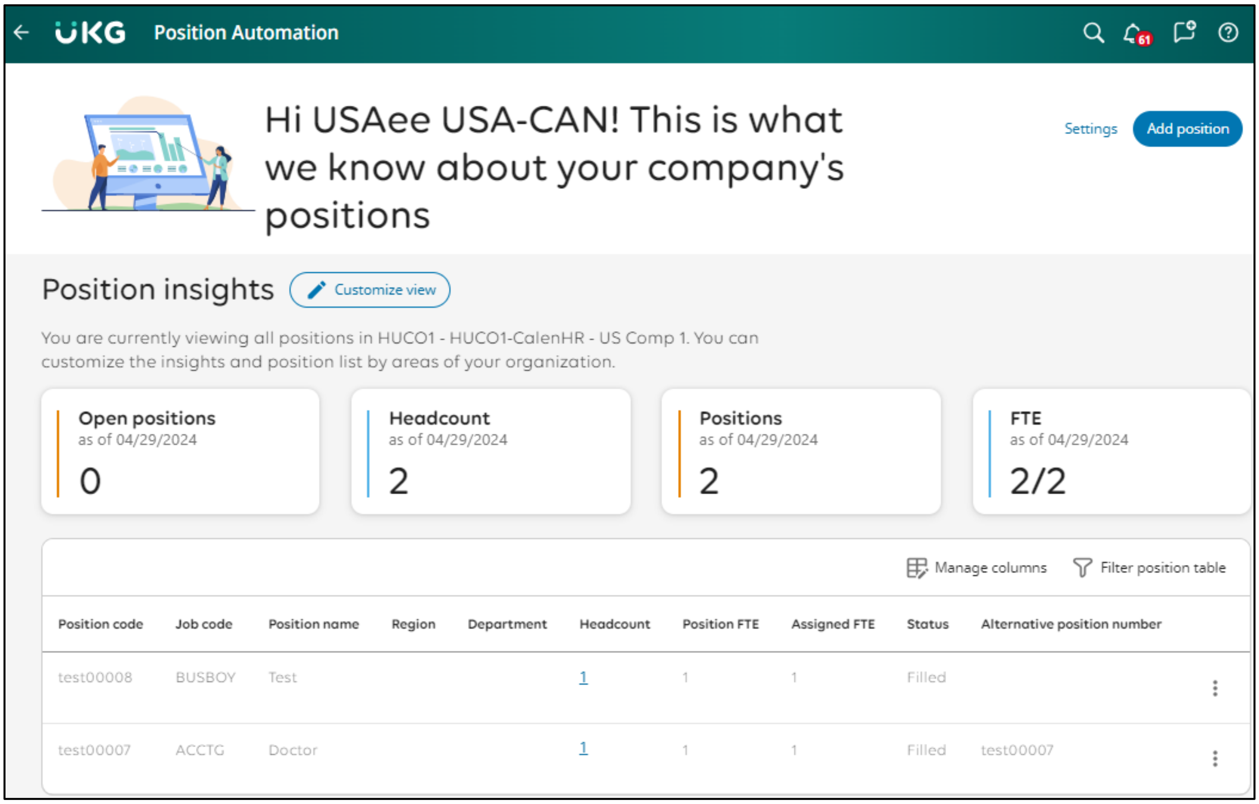
5. Select **Next** to navigate to the last step. During the process, the field data is validated Important: The administrator must correct field data issues described in validation messages before proceeding.
6. Select **Next** to make employee assignments.
    a. Select Add Employee.
    The list of employees available for assignment appears. The list also includes any employees that have a secondary job assigned in UKG Pro. The listed employees correspond to the selected Component Company and Job from the Organizational details and Position details screen respectively.
7. Choose one or more employees to add to the position by selecting the corresponding checkbox.
8. Select Add to view the selected employees in the grid.
9. Enter the FTE required for each employee in the grid.
10. Select Add Position to create the position and assign the employees.
    Important: The administrator must correct field data issues before proceeding.

  i. If Over-staffing was not allowed and the total assigned employee FTE is more than the Position FTE, an error appears, and the position is not created until either the Position is FTE is increased (more than the total assigned employee FTE) or the allocated employees FTEs are lowered down below the Position FTE.
  ii. If Over-staffing was allowed, the system will just give a warning about overstaffing and the user can continue with creating a position.

11. (Optional step) Select the Previous button to navigate to the Organization Details section. Alternatively, select the section name in the navigation pane to move to that section.
12. After the position is created, the Position Insights page displays a success message to confirm that the position has been created.
    In cases where the employee assignment fails, a message appears that requires the administrators to update the position and assign the employee again.

View Position Insights

Administrators can view a high-level summary of the positions that are currently available in Position Automation based on their access rights.



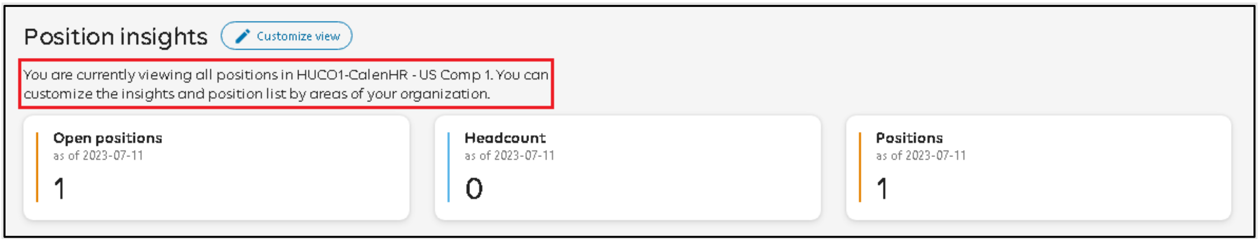
Navigation: UKG Pro Menu > System Configuration > Position Automation > Positions

1. From the Position Insights page, view the position and headcount numbers that appear in three different categories, depending on the current status.

Category	Description
Open Positions	Indicates the number of active positions that are either in an open or partially filled status. If a position has an FTE of 2 and the employee assigned has a count of 1.5, the position is included in the Open Positions count.
Headcount	Indicates the number of employees assigned to positions, including employees in partially filled positions. A headcount of 1 appears in both cases: (1) an employee is assigned to a position for an FTE of 0.1 and (2) an employee is assigned to position A as 0.5 and position B as 0.5.
Positions	Indicates the number of all positions that are in an active status.
FTE	Indicates the FTE or fulltime equivalent value of the assigned positions

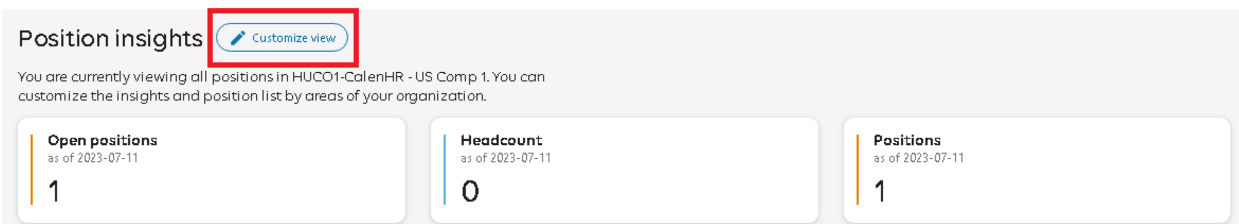
Note: Only approved and non-approved positions in an active status are included in the count. Inactive positions are excluded from the count.

By default, administrators can view the insights data for the Component Company to which they have access. The counts display the number for the current date based on the selected areas of your organization. The Positions table is linked to the scope of the insights.

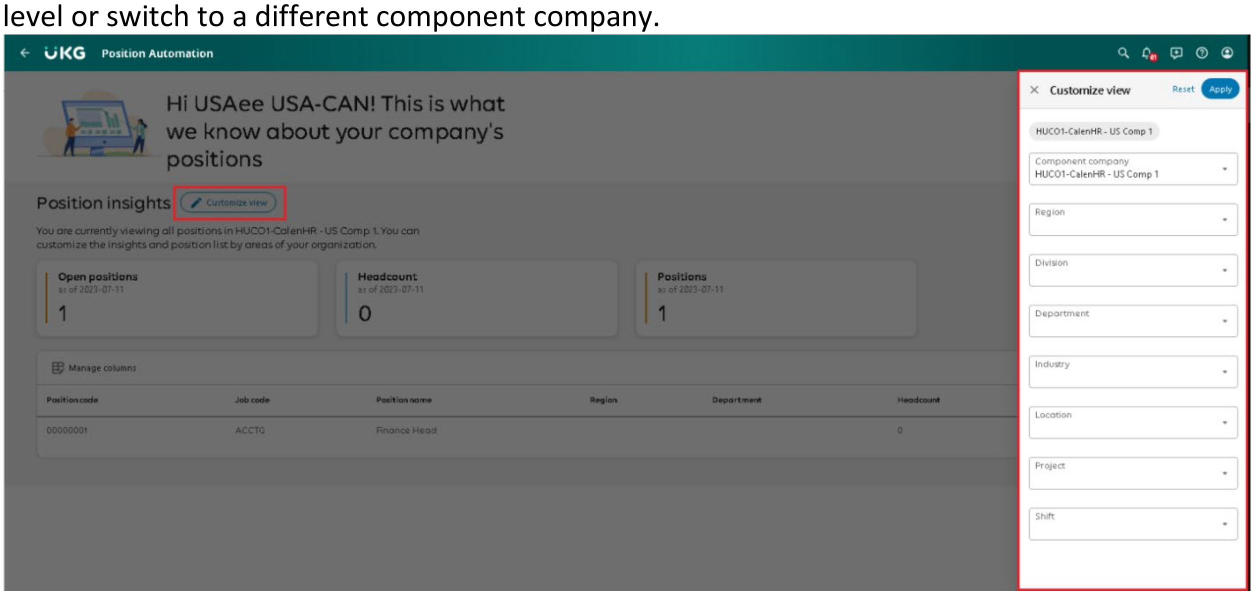


Customize Position Insights

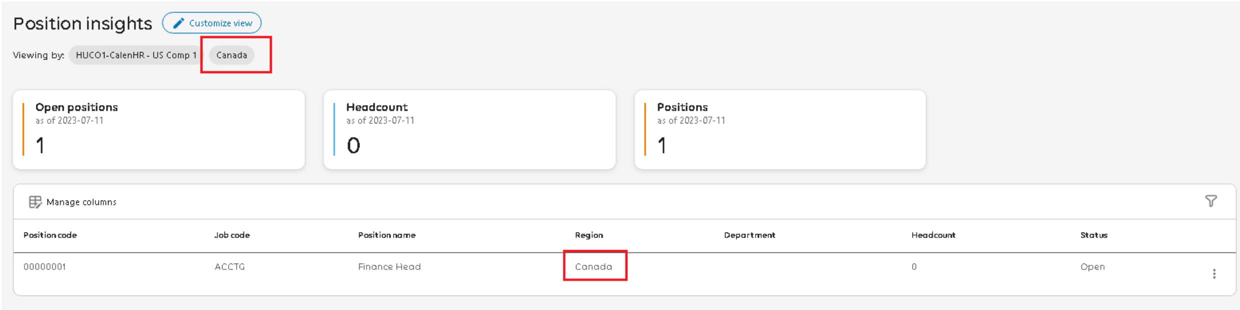
The information in the Position Insights section is customizable using filters and updates dynamically based on the selected criteria.



For example, administrators can use filters to narrow the information to a specific organization level or switch to a different component company.



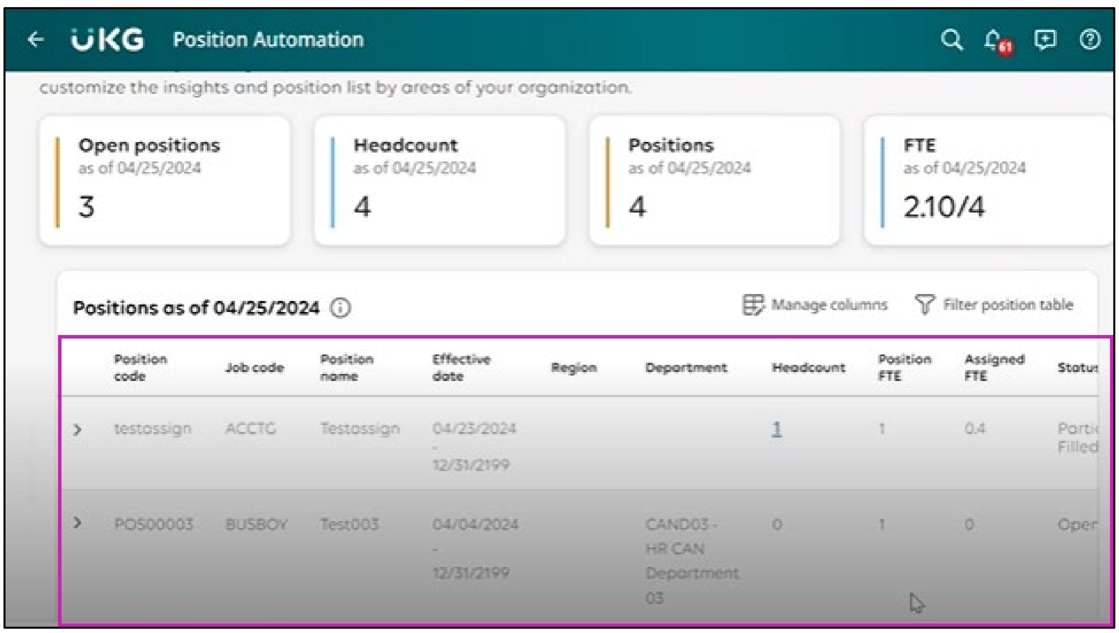
By customizing the view using options from each filter, administrators can easily gain insight into position and headcount status.



Note: Administrators can select a single option from each of the available filters. When no options are selected for any of the filters, then all values are considered as selected. The component company field is a required field, and you must select an option.

Manage Position Insights Table

Administrators can customize and manage the view of position details in the Position Insights table.



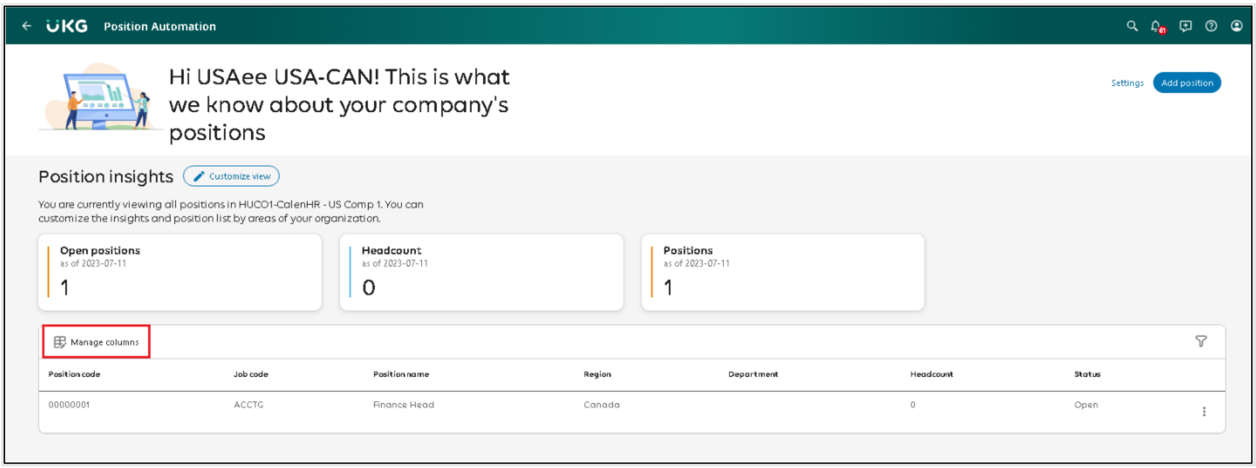
- Select which organization level to display using the **Customize View** link, and the table automatically updates with the related position details.

Manage the view of the Position Insights table by selecting the columns to make visible and placing them in the desired order.

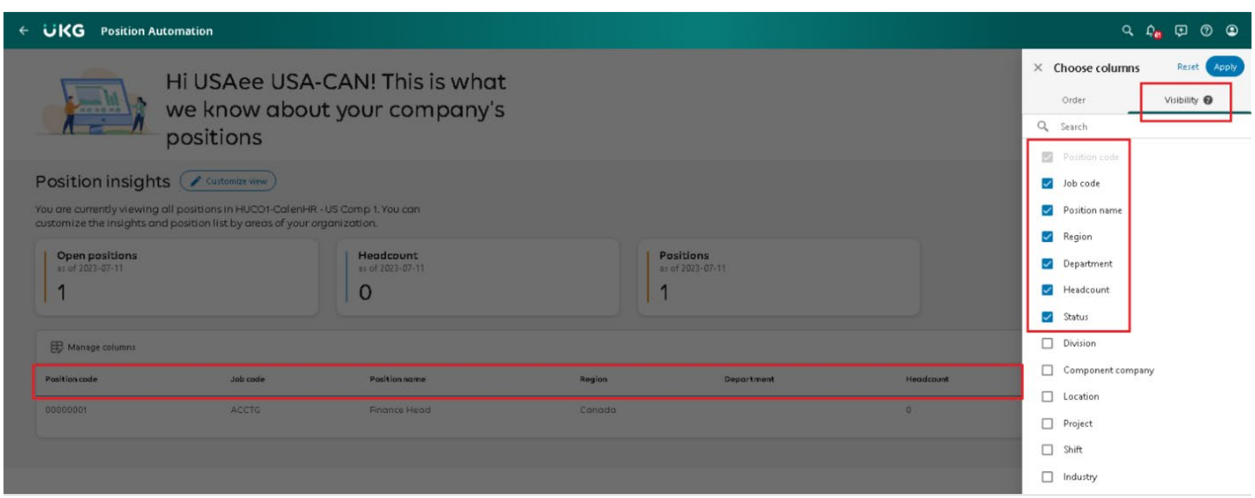
1. Select the **Manage Column** option.
   A panel appears on the right side of the screen.

2. From the Visibility tab, check or uncheck the columns to add or remove them from the Position Table.
3. From the Order tab, select the up and down arrows to define the order of the columns. Any newly added columns are placed at the end of the ordered column list.

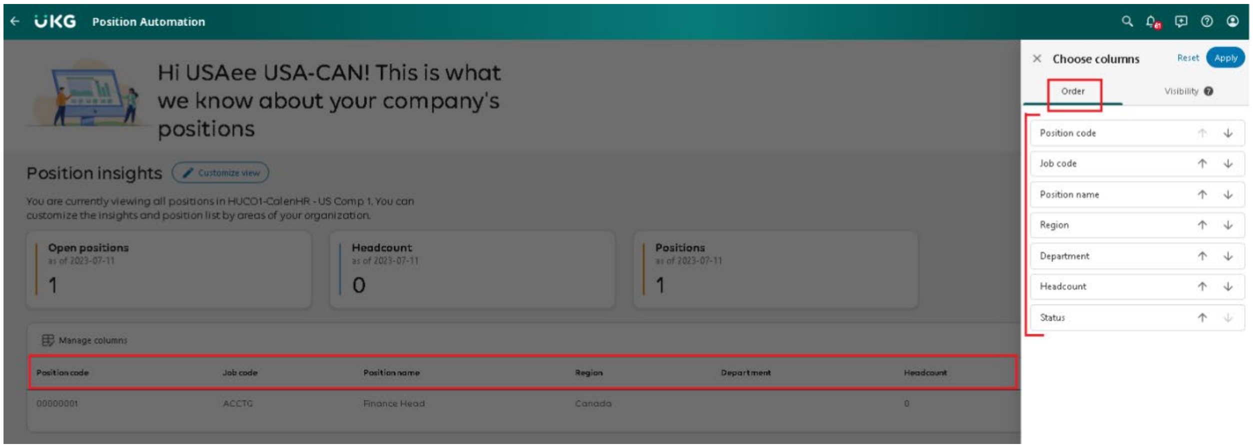
Note: The customized view is saved and accessible when the administrator returns to the Position Insights page.



The default list of visible columns and their order are pre-selected and ordered under 'Visibility' and 'Order' tabs respectively.

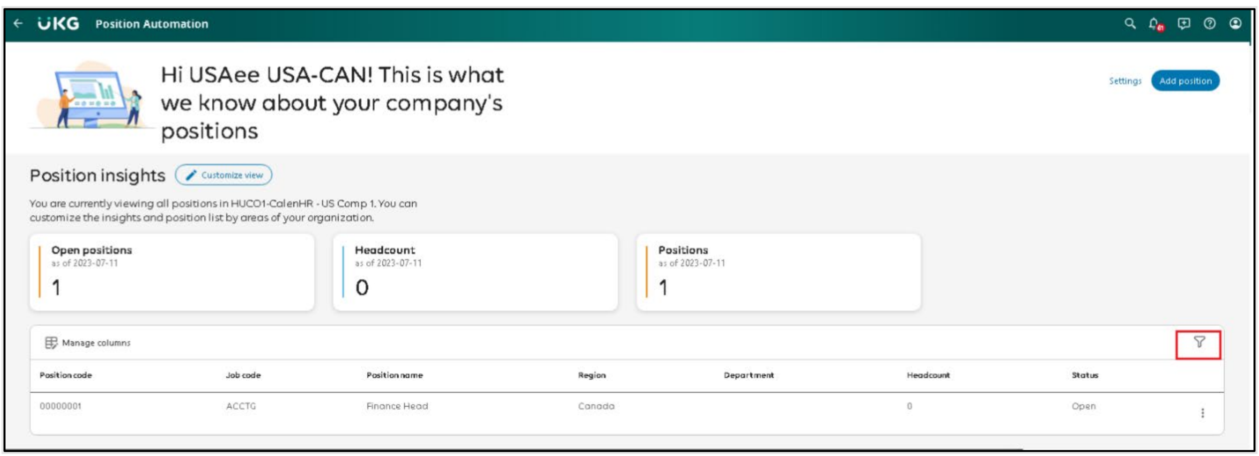


Note: The position code column is selected by default and cannot be removed from the table.



Position Insights and Filters

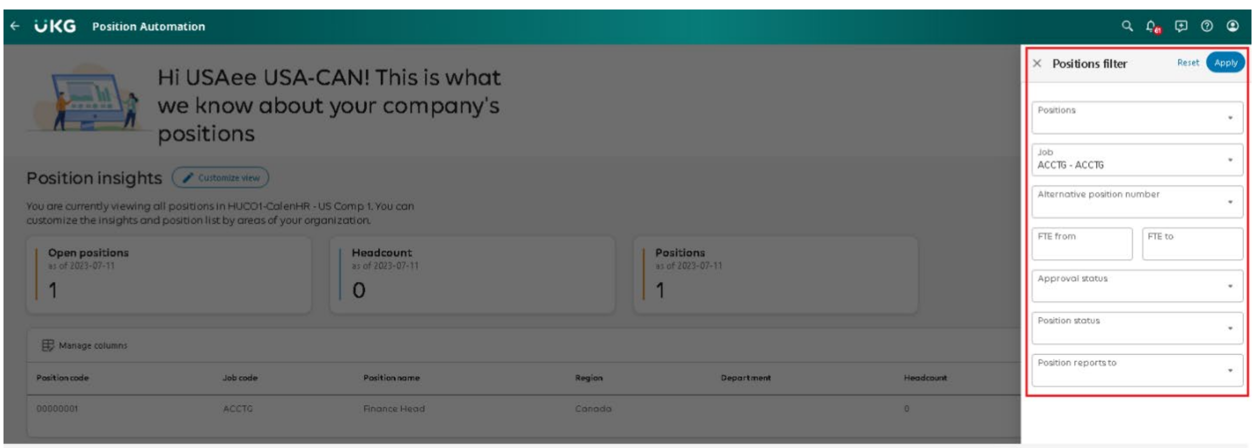
Administrators can use the available filter options to filter the data in the position table.



Administrators can use the following filter options:

Option	Description
Positions	Select one or more position names and additional criteria to include in the filter.
Job	Select one or more jobs and additional criteria to include in the filter.
Alternative position number	Select one or more alternative position numbers and additional criteria to include in the filter.
FTE from & FTE to	Select an FTE range in the From and To fields to filter the positions based on a date range. The filter results include the position data that has an FTE value equal to or more than the “FTE from” value or the FTE value is less than or equal to the “FTE to” value.

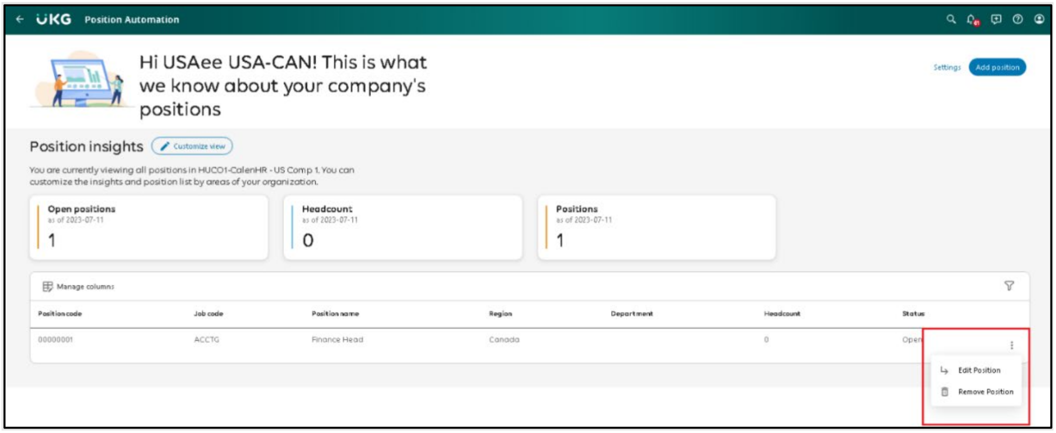
Option	Description	
Approval Status	Select to either view the approved positions, unapproved positions, or both.	
Position Status	Select one or more position statuses and additional criteria to include in the filter as follows:	
	Open	The position exists but no employees have been assigned to the position yet.
	Partially Filled	The position has employees assigned to it, but more employees can be assigned since the sum of allocated FTEs of the employees is less than the Position FTE.
	Filled	The position has employees assigned to it and the sum of allocated FTEs of the employees is equal to the Position FTE.
	Overstaffed	The position has employees assigned to it such that the sum of allocated FTEs of the employees is more than the Position FTE. (This is only possible if the overstaffing option is allowed in the settings)
	Inactive	The position is inactive and is currently not being used (not even in any metrics). No employees can be assigned to an inactive position.
Position reports to	Select one or more positions to which this position reports and additional criteria to include in the filter.	



Note: Administrators can select one or more options from each of the available filters. When none of the options are selected from the available filters, all values are considered as selected.

Position Insights Menu

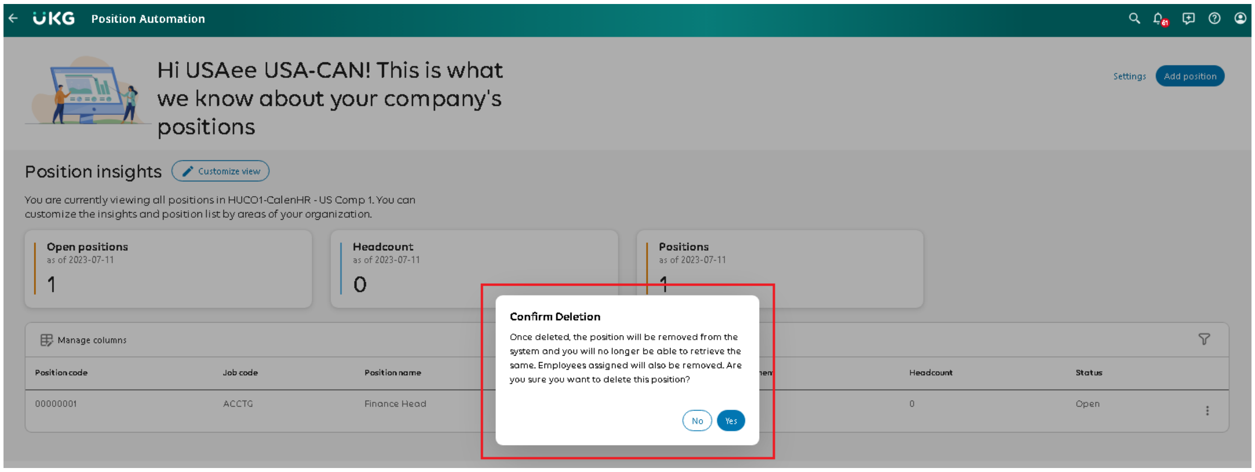
Administrators can access the Position Insights menu by selecting the three dots next to the table. Depending on the administrator's web access rights, the menu options to remove, view, and update positions are available for selection.



Option	Description	Note
Remove Position	For unapproved positions, administrators can access this option to remove a position.	Not available for administrators with view only access.
View Position	Administrators with view only access can access this option to view the position details, including position, organization, and assigned employees, but cannot make any changes.	Not available for administrators with edit access.
Update Position	Administrators with edit access can use this option to update and make changes to the position details, including position, organization, and assigned employees.	Not available for administrators with view only access.

Remove Position

Administrators can remove any unapproved position from Position Automation. From the Position Insights page, select the ellipsis (More icon) to the right of the position and then select the Remove Position. The user will be alerted with a pop-up confirmation before the position gets removed. Once confirmed, the position is removed from the system.

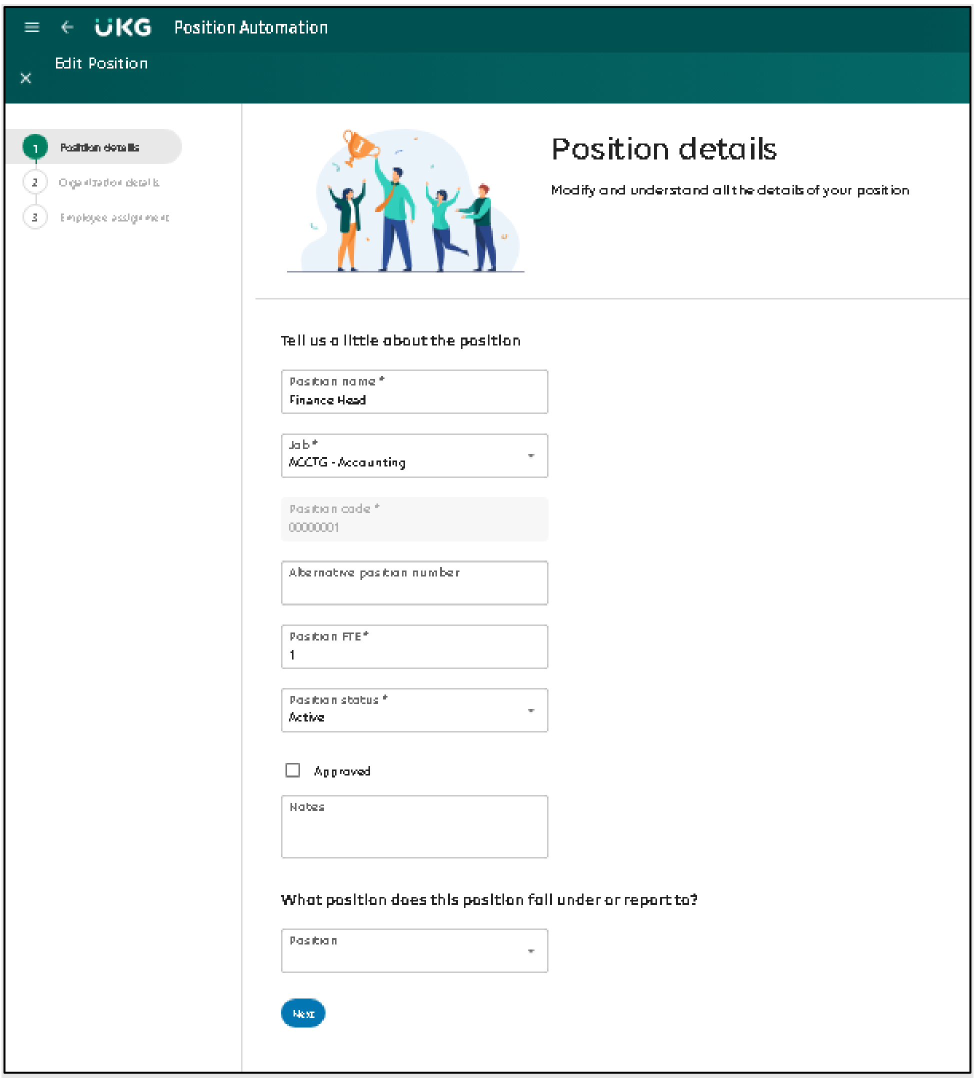


Note: The position that is removed from the system cannot be recovered.

Edit Position Details

Administrators can make updates to any position by using the fields on the Edit Position page.

1. Select the position to update, and then choose the **Update Position** option.
   The Edit Position page appears.
2. From the Position Details section, administrators can view the pre-filled data in all the fields.



Administrators can update all the available fields except these:

- **Job**: When employees are not assigned to the position, the field is enabled. When employees are assigned to the position, the field is disabled, and a message appears above the field: '*This position has employees assigned. To change the job, you must remove the assigned employees.*'
- **Position Code**: This field is disabled and cannot be modified.

- **Approved**: This field is disabled and cannot be enabled if it was checked in the prior transaction. If, however, the field was previously unchecked, it can be enabled.

Below are the impacts of updating fields from the Position Details section:

- Change in Position FTE

Scenario	Action	Result
There is a change to Position FTE for employees assigned to those positions.	The Position FTE value was reduced. Now, the sum of the allocated employee FTE is more than the new reduced value of the Position FTE.	When the Position FTE value is reduced, a message appears “the Employee FTE is more than the Position FTE resulting in Overstaffing that is not allowed.”
There is a change to the Position FTE and overstaffing is not allowed	Reduce the Position FTE from the existing value so that the sum of the allocated employee FTE is more than the updated Position FTE	Administrators can navigate to the Employee Assignment section. When the Position FTE is overstaffed, a message appears “the Employee FTE is more than the Position FTE resulting in Overstaffing that is not allowed.”

- Change in Position status.

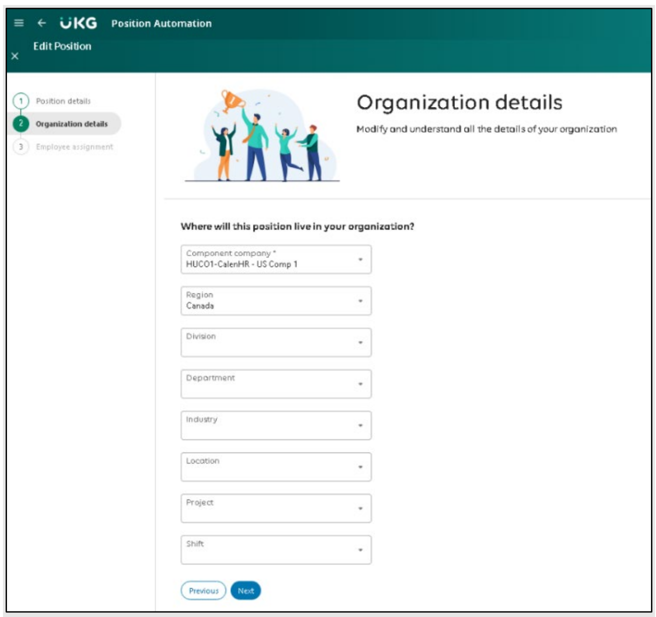
Scenario	Action	Result
Active	Inactive	• If employees are assigned to the position, the inactive options are disabled, and the administrator will not be able to mark the position as inactive. • Administrators must remove the employees from the position first (from step #3 Assign Employees). Once the employees are removed, administrators can access the ‘Inactive’ option. • Marking a position inactive will disable the position and the same will not be available for any employee assignment. • Administrators can mark a position inactive irrespective of the approval status.
Inactive	Active	• Administrators can mark any position from inactive to active. Once the user selects ‘Active’ option, when in ‘Assign Employee’ step, the user will be able to add employees to the position.

After making the necessary changes in the section, the user can select the ‘Next’ button to navigate to the ‘Organization Details’ section.

Organization Details

The Organization Details section contains fields that describe where in the organization the position will live. From the Position details section, administrators can navigate to the Organization details section by selecting **Next**. Administrators can view the pre-selected values for the fields and make updates, except for the Component Company field.

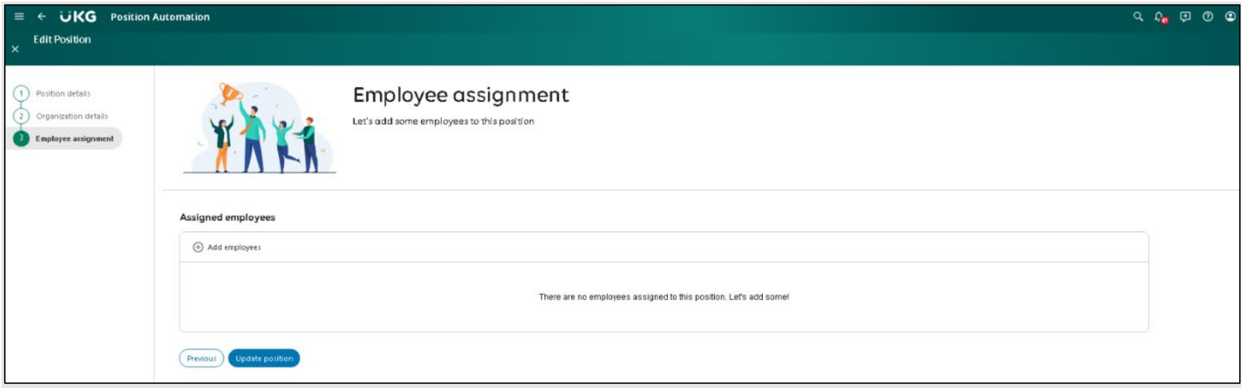
When employees are assigned to this position, the message '*This position has employees assigned. To change the component company, you must remove the assigned employees*.' above the field. In case no employee(s) is/are assigned to the position, this field will be enabled.



After making the required updates in the Organization details, select Next to the Assign Employee section. You can navigate to the previous sections by selecting the **Previous** button or via the navigation pane.

Assign Employee

On the Organization details section, select **Next** to navigate to the Assign Employee section.



Based on the status of position assignments, the following two scenarios describe the impacts and details that administrators can view.

Scenario	Description
Employees were assigned to positions, but no updates were made in the Job or Component Company.	Administrators can view the last employees that were assigned in the table with the pre-specified employee FTEs.
Employees were not previously assigned to positions.	Administrators cannot view any employee in the table but will be able to assign new employees to the position.

Administrators can complete the following tasks:

- Add a new employee.
- Remove an existing employee.
- Modify an existing employees' FTEs.
- View an employee's secondary job assignment (view-only in Position Automation). Update secondary job assignments using the Add/Change Secondary Job business process in UKG Pro.

If an employee has a preferred name, their preferred name will show in the employee list along with their last name.

After Update Position is selected, the updates are verified and if updates are valid, the position details are updated in Position Automation.

Note: The system verifies over-staffing conditions. The impact will be the same as when creating the position.

View Secondary Jobs

Secondary job details are viewable on the Job Summary page in the Secondary Jobs section.

NOTE: A Position Automation section displays on the Job Summary page when an employee has a position assigned to their primary or secondary job(s).

Employees and managers can view secondary job information by navigation to the following pages:

- Employee Navigation: Menu **>** Myself **>** Jobs **>** Job Summary
- Manager and Administrator Navigation: Menu **>** My Team **>** My Employees **>** select employee **>** Jobs **>** Job Summary

Available grid options for display include the following: Secondary Job, Alternate Title, Status, Supervisor, Organizational Details, and Job Start and Job End dates. In addition, an Effective Date field provides history tracking details. The grid is configurable by selecting the arrow and selecting columns you'd like to view in the grid.

NOTE: If an employee has worked for more than one company, a company selector drop-down menu appears. The selector is only available in the Myself section of the employee menu.

View Secondary Job History

View employee secondary job history using the Secondary Job History page.

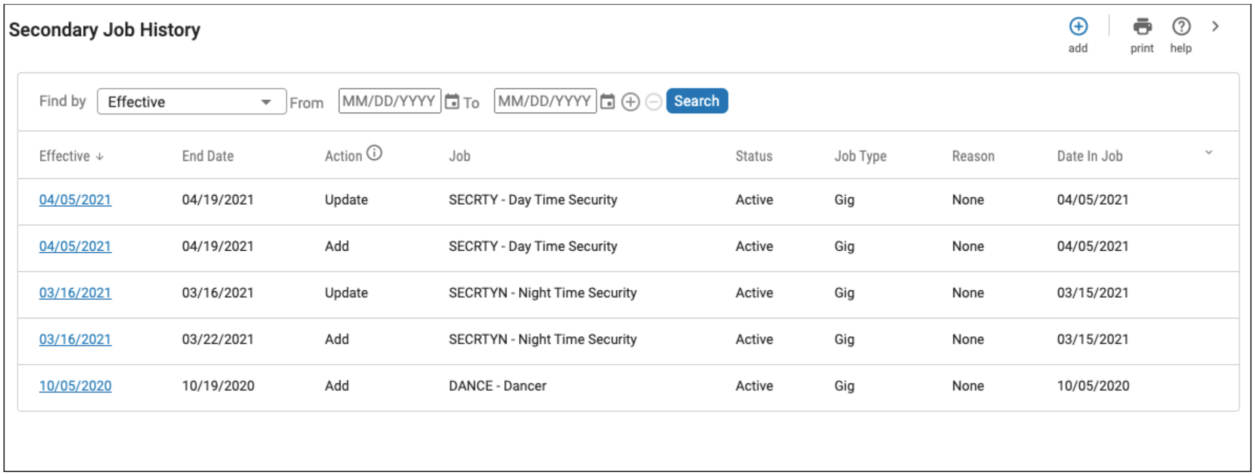
Navigation: Menu **>** My Team **>** My Employees **>** select employee **>** Jobs **>** Secondary Job History

Quickly search secondary job history records using the Find By or From/To Search options.

The records on the page include the effective date, job start and job end dates, action, status, alternate title, and reason. The menu on the grid allows you to select viewed columns in the grid.

You can complete the following for secondary job history:

- View a list of employees with secondary job history.
- View employee job history details by selecting an effective date link.
- Add employee secondary job history.
- View employee secondary job position details for Position Automation by selecting an effective date link.



Secondary Job History

add print help

Find by Effective From MM/DD/YYYY To MM/DD/YYYY Search

Effective	End Date	Action	Job	Status	Job Type	Reason	Date In Job
04/05/2021	04/19/2021	Update	SECRTY - Day Time Security	Active	Gig	None	04/05/2021
04/05/2021	04/19/2021	Add	SECRTY - Day Time Security	Active	Gig	None	04/05/2021
03/16/2021	03/16/2021	Update	SECRTYN - Night Time Security	Active	Gig	None	03/15/2021
03/16/2021	03/22/2021	Add	SECRTYN - Night Time Security	Active	Gig	None	03/15/2021
10/05/2020	10/19/2020	Add	DANCE - Dancer	Active	Gig	None	10/05/2020

Add or Change Secondary Jobs

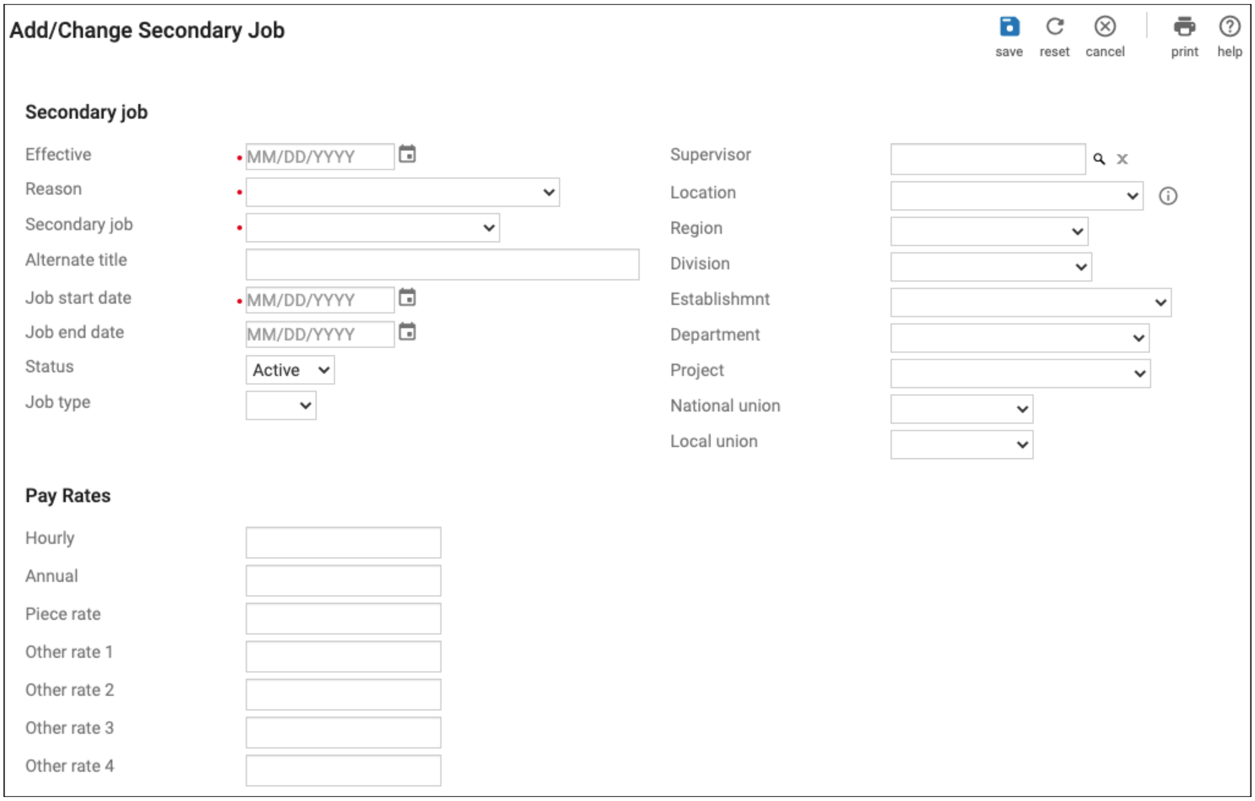
Add or change an employee's secondary job information, including pay rate, on the Add/Change Secondary Jobs page.

NOTE: Employees must be assigned to a job group in order for the secondary job functionality to work properly. Secondary jobs must be in the same job group as the primary job that is assigned to the employee.

NOTE: A message, “secondary job is not available,” appears in cases where the secondary job has already been assigned to the employee or when the job is not part of the same job group. If the message appears, it could also be that all secondary jobs have already been assigned to the employee.

Navigation: Menu **>** My Team **>** My Employees **>** select employee **>** Jobs

1. From the Jobs page, Things I Can Do section, select Add Secondary Jobs. The Add/Change Secondary Job page appears.
2. In the Secondary Jobs section, enter an effective date.
3. Select a reason from the Reason drop-down list.
4. From the Secondary Job drop-down list, select the secondary job.
5. Enter an alternative title to provide more information about the secondary job, as needed.
6. Enter the job start date.
7. Enter the job end date, as needed.
8. Select a status as Active or Inactive from the Status drop-down list.



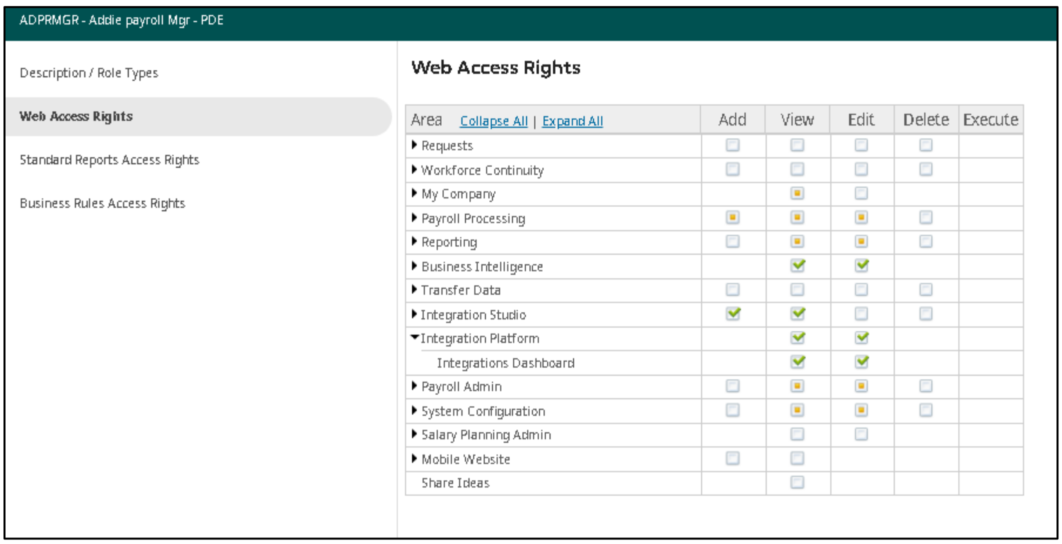
9. Select the job type from the Job Type drop-down list, as needed.
10. Complete the additional fields, such as Supervisor and Location, as needed.
11. In the Pay Rates section, enter the pay rate information, as needed.
    NOTE: You may enter a different rate for the secondary job. Work with your Payroll Administrator to ensure accuracy and to determine how the pay rate may be processed via Payroll.
12. (Optional Step). In the Position Automation section, complete the following:
    - Select a position code from the drop-down menu to assign a position to the secondary job.
    - Enter an FTE value in the FTE field. The Total FTE ratio displays the amount used for positions from other jobs and the total. Subtract the amount used from the total to obtain the remaining FTE. For example, a ratio of 0.75/1.00 means that 0.75 FTE has been used and 0.25 FTE remains based on the 1.00 total FTE.
13. Select Save. The Summary page appears.
14. Review the summary information for accuracy. Complete changes, as needed.
15. Select Submit if the workflow is turned on.

Enable Access to the Integrations Dashboard

Access to the Integrations Dashboard requires assigning web access rights to the appropriate user roles in UKG Pro.

Navigation: Menu > System Security > Role Administration > select a role > Web Access Rights > Integration Platform

1. From the Integration Platform section, check the View and Edit access boxes.
   When access is enabled to users assigned to the role, they can use the Integrations Dashboard to import, run or edit the integration for Position Automation, as needed.

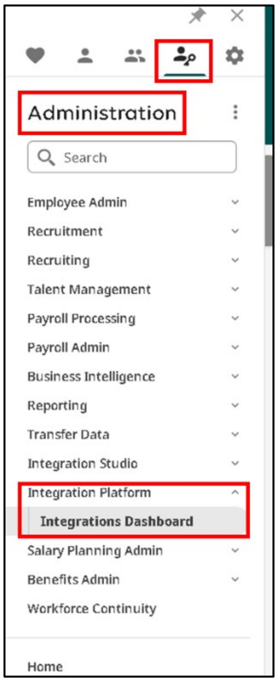


View the Integrations Dashboard

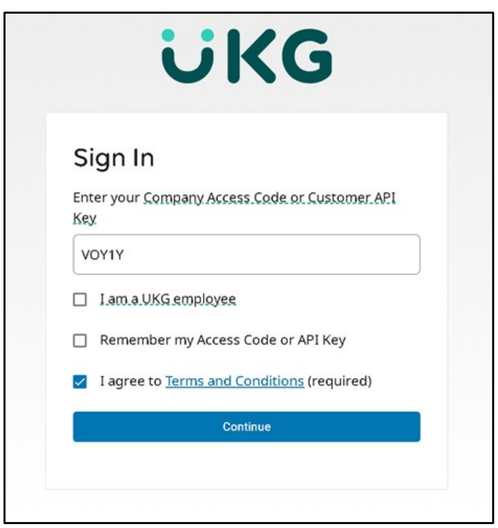
After web access rights are granted, administrators can view the Integrations Dashboard menu option.

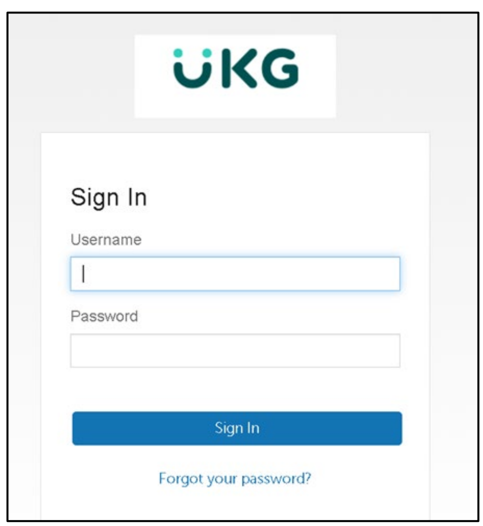
Navigation: Menu > Administration > Integration Platform

1. Expand the Integration Platform menu and select the Integrations Dashboard.



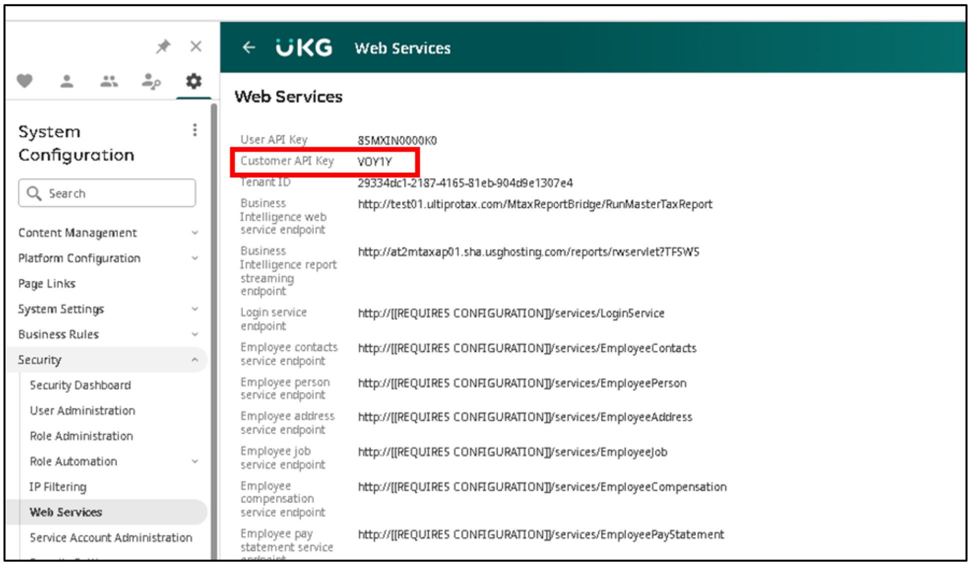
2. Enter the Customer API Key and then enter your Username and password credentials.





Note: SSO authentication is currently unavailable.

You can obtain the Customer API Key on the Web Services page in UKG Pro (Menu > System Configuration > Security > Web Services).



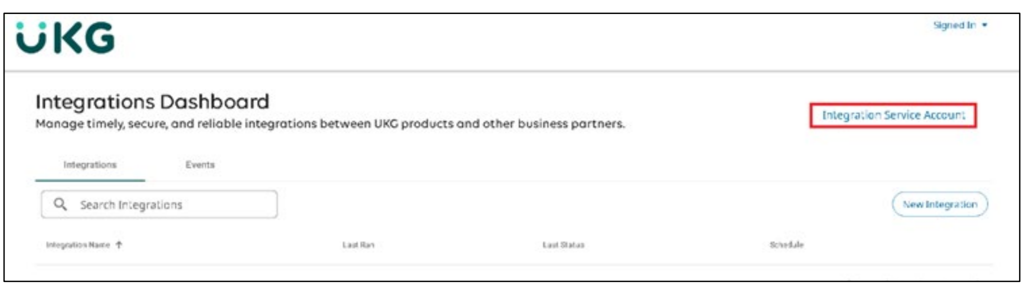
Once the credentials and customer API key are validated, you can access the integration dashboard.

Configure the Integration Service Account

An Integration Service Account must be configured for the import before you can start with the import. If the Integration Service Account is not configured, the new integrations that are executed by the administrator will fail.

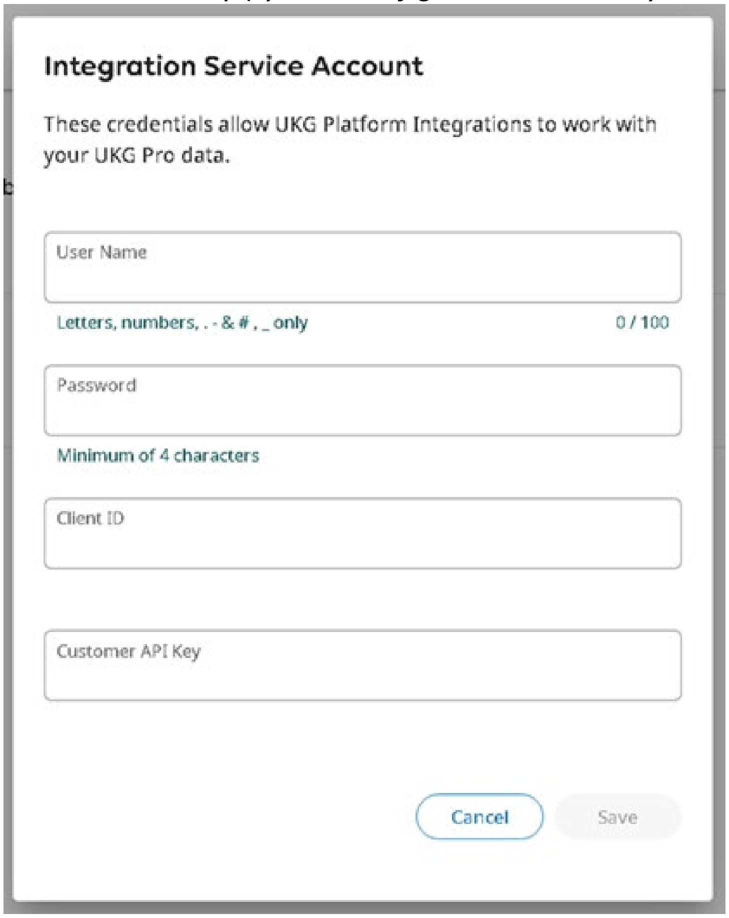
Navigation: Menu > Administration > Integration Platform > Integration Dashboard

1. From the Integrations Dashboard page, select Integration Service Account.



2. Enter details in the following fields:
   - User Name – This information must match the information in the Service Account (Menu: System Configuration > Position Automation > Positions > Settings > Service Account)

- Password – This information must match the information in the Service Account (Menu: System *Configuration > Position Automation > Positions > Settings > Service Account*)
- Client ID – This information must match the information (*System Configuration > Company Set up -- Code*)
- Customer API Key (*System Configuration > Security > Web Services – Customer API Key*)



Integrations Dashboard

Administrators create positions and assign employees to positions in bulk using an import that is managed using the Integrations Dashboard. Imports are completed in two steps by using the pre-defined integration or creating a new integration.

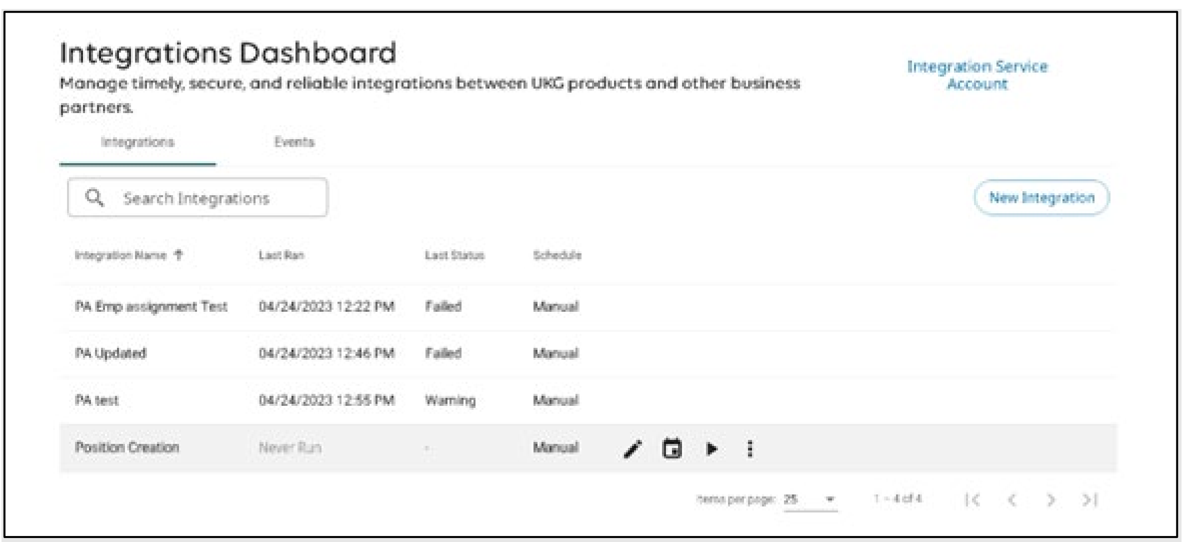
1. Import Open Positions
2. Assign Employees to Positions

The list of available integrations appears in a table that includes the Integration name, Last Ran (date & time), Status of the last execution and the schedule details.

For each integration, administrators can access the options described in the table.

Option	Description
Edit Integration	Users will be able to make updates to the integration.
Execute/Run Integration	Users will be able to run the integration to perform specific import (i.e., create positions or assign employees).
Delete/Remove Integration	Users will be able to remove an integration that is no longer required. Once deleted

Administrators can create new integrations or use an existing integration. Enter a keyword search to find existing integrations.



Import Positions via the Integrations Dashboard

The Integrations Dashboard is used to import positions into Position Automation. Administrators can set up the import based on position data or employee assignment.

After the import is complete, a status of the import process is provided. Review the status and make any necessary adjustments.

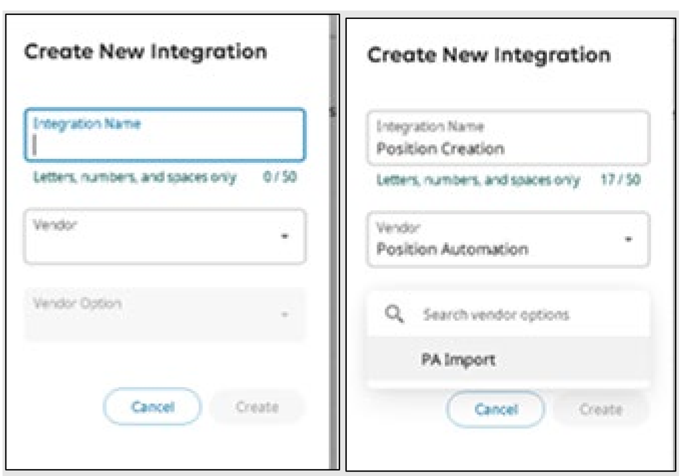
Create a New Integration

Administrators can create a new integration to import positions into Position Automation.

Navigation: Menu > Administration > Integration Platform > Integration Dashboard

1. To begin, select **New Integration.**
2. In the **Create New Integration** section, complete the following fields:
    - In the Integration Name field, provide a name for the import being used for the integration.
    - In the **Vendor** field, select the Position Automation option.
    - In the **Search Vendor Options** field, select the **PA Import** option.

3. Select **Create** to create the new integration.
   The Manage Integration section appears.



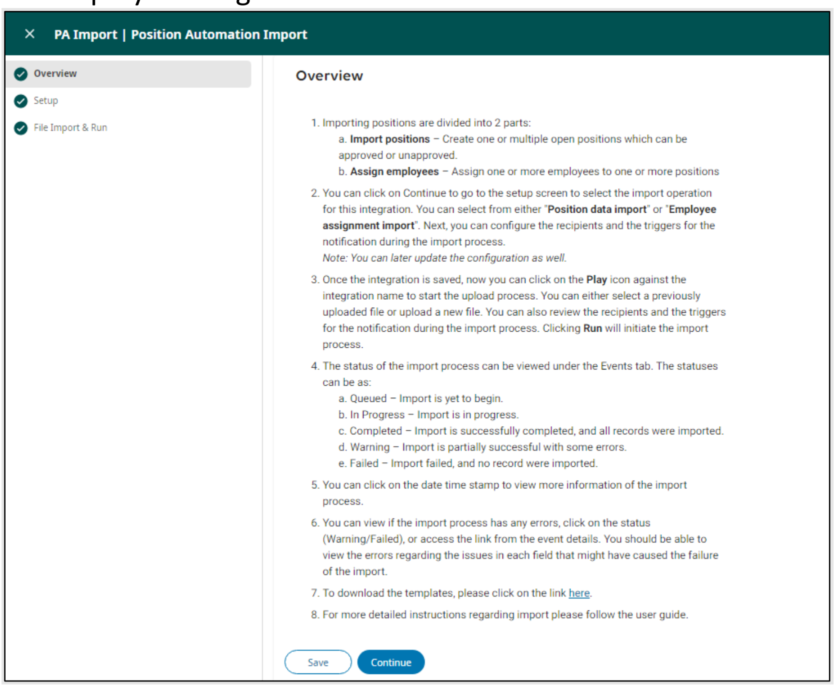
Manage Integration Overview

Integrations are used for many different types of imports. For Position Automation imports, administrators must configure and manage a newly created integration.

This section contains the information needed to complete the import of positions using the Integrations Dashboard. The import instructions appear and import templates are available to download.

Download Import Templates

1. Select the link to download the two import templates to your local drive.
   - Position Import
   - Bulk Employee Assignment

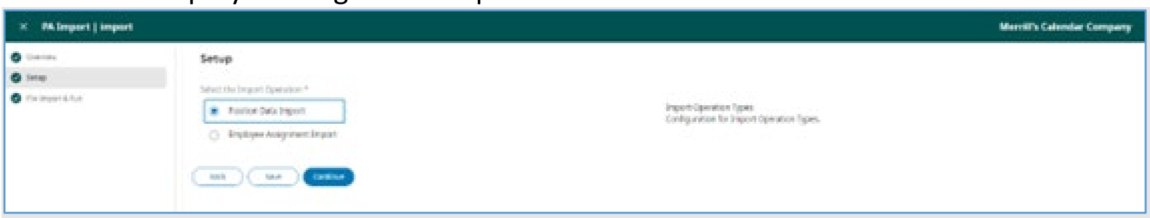


2. Enter data in the appropriate template.
3. Select Continue to proceed with the setup.

Manage Integration – Set Up

Administrators can select from the available import options to define the purpose of the integration.

- Position Data Import
- Employee Assignment Import



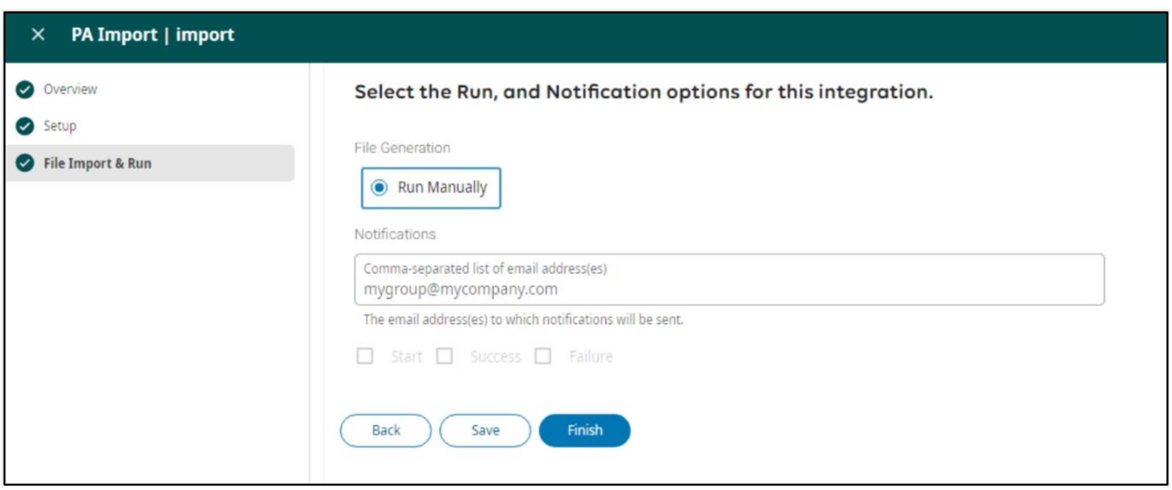
Administrators can save their changes at any time. To return and complete the changes, select Continue to move to the last step.

Manage Integration – File Import and Run

Administrators can manage the scheduling and notification settings in this section.

1. By default, file generation is set to run manually.
2. In the Notification box, enter the email addresses to send notifications to the specified recipients.
   This is an optional step.
   - If sending notifications, you can elect one or more notifications available during the generation process: Start, Success and Failure.

3. Select Finish to complete the Integration setup.
   The Integration Dashboard appears.

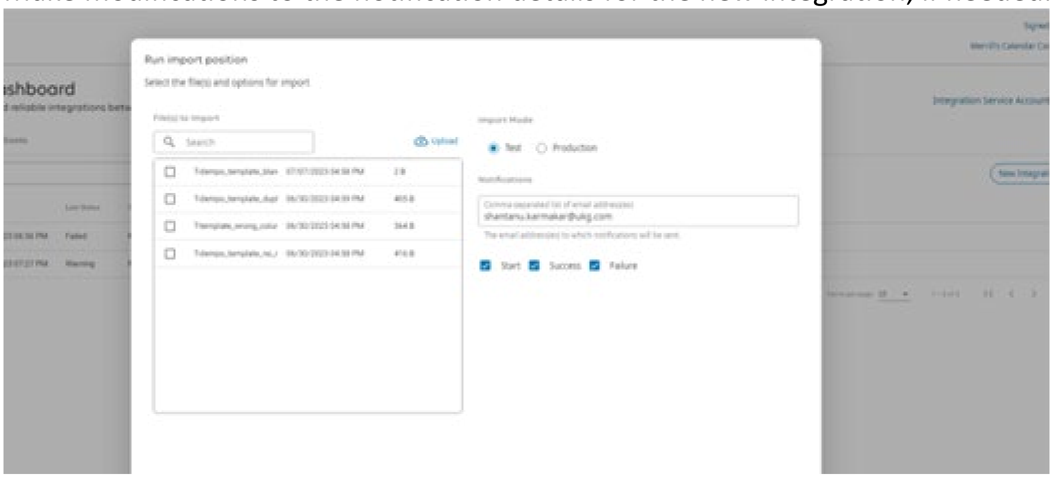


Manage Integration - Run and Execute

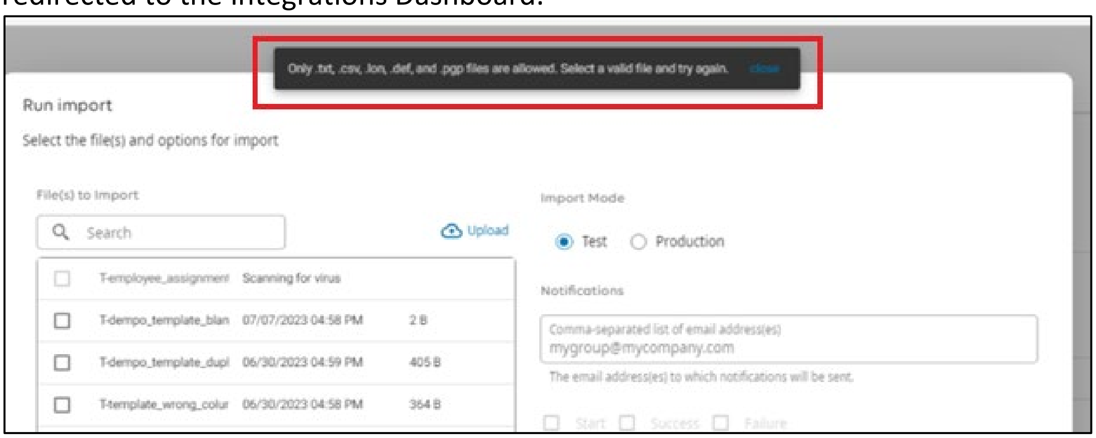
Administrators manage integrations by importing and running (or executing) the import position file.

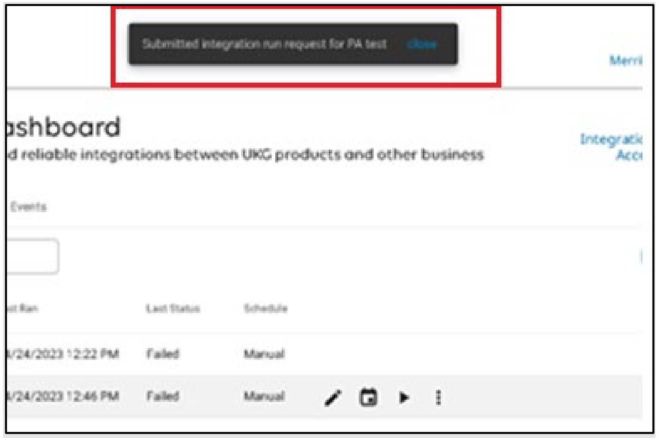
Navigation: Menu > Administration > Integration Platform > Integration Dashboard

1. From the Integration Dashboard, select the Run icon. The Run Import Position dialog box appears.
2. Select the new import file to upload.
3. In the Import mode section, select Production.
4. Review the notification details, including the recipient(s), and timing (for example, notify at the Start, Success, and Failure statues) that were previously configured.
5. Make modifications to the notification details for the new integration, if needed.



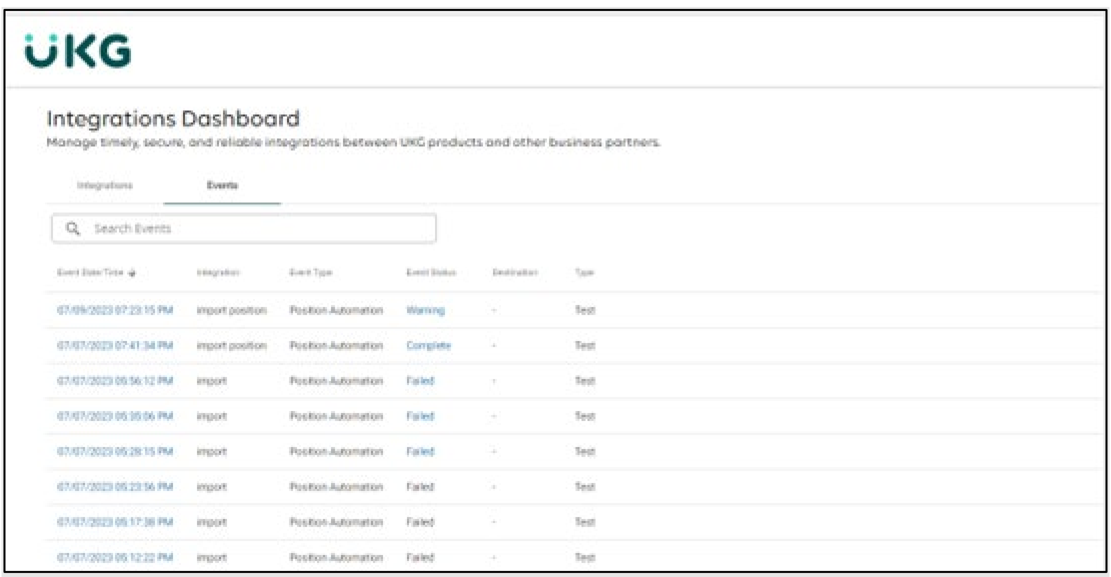
6. After the file is uploaded, select **Run** to start the import.
7. After the process is completed, review the uploaded file status message.
   - If the file upload is unsuccessful, review the message that displays and select a valid file to upload.
   - If the file upload is successful, the success message appears. The administrator is redirected to the Integrations Dashboard.





View Executed Integrations

Administrators can view the executed integrations using the Events tab on the Integrations Dashboard page.



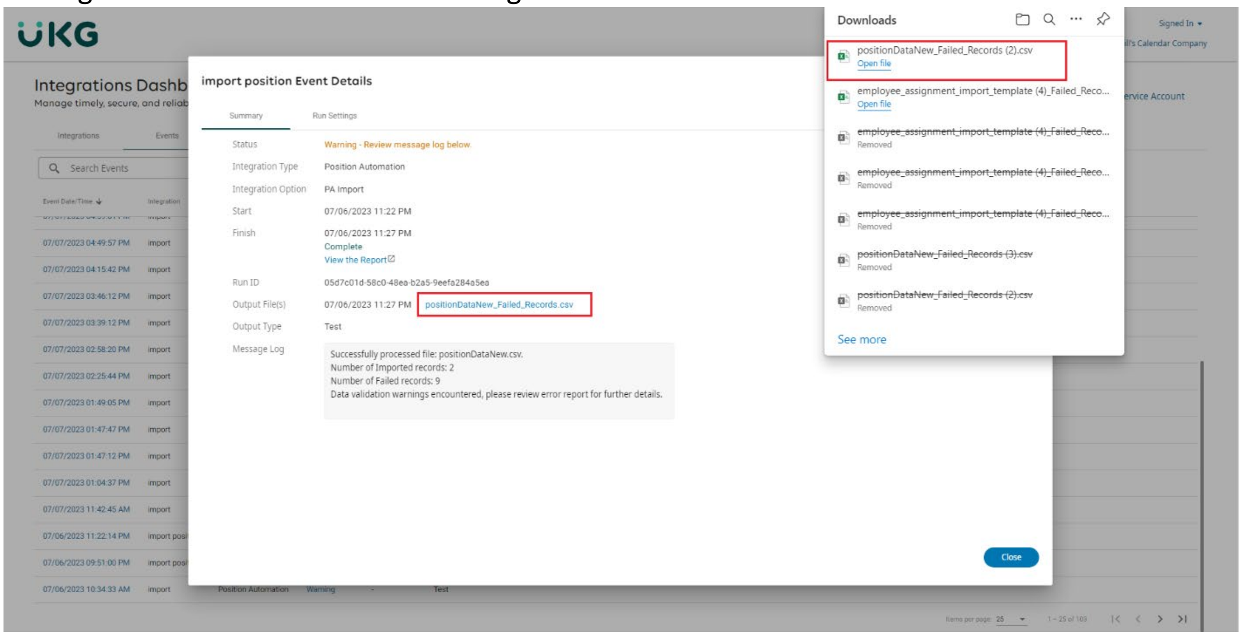
Administrators can view the list of the executed integrations in descending order of the timestamp, including details, such as Integration Name, Type and Event Status.

The different statuses are as follows:

- **Queued** – File is in queue and is pending for execution.
- **In Process** – File is being executed.
- **Warning** – File is executed but one or more records were not imported.
- **Failed** – File has issue and was not executed.
- **Completed** – File is executed, and all the records are imported.

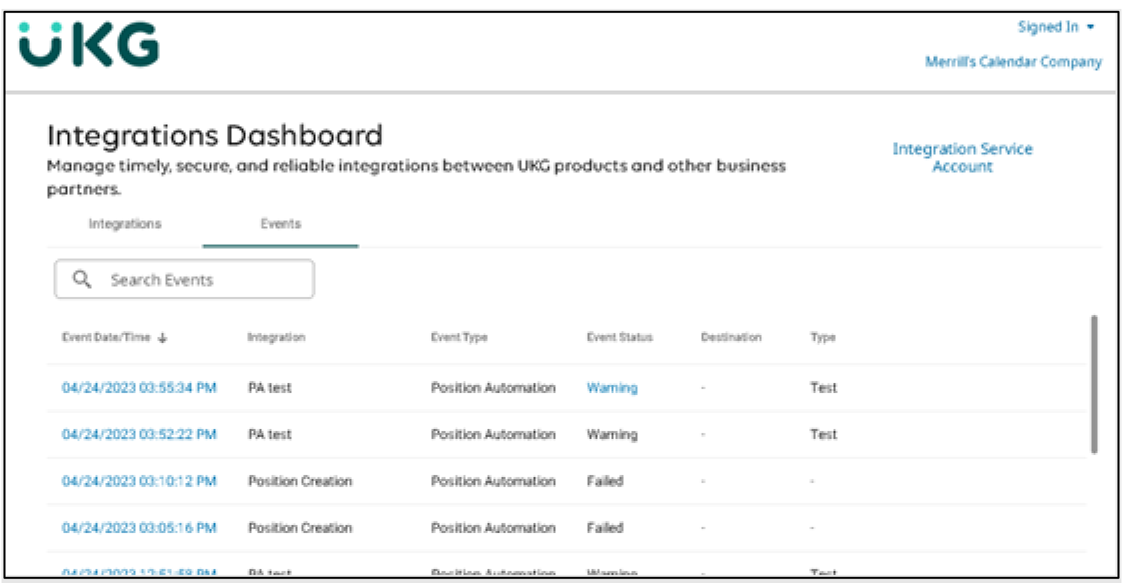
Note: If the integration that was just completed is not visible, refresh the page.

Select a timestamp to view the details of the execution, which includes the summary and the settings effective for the executed integration.

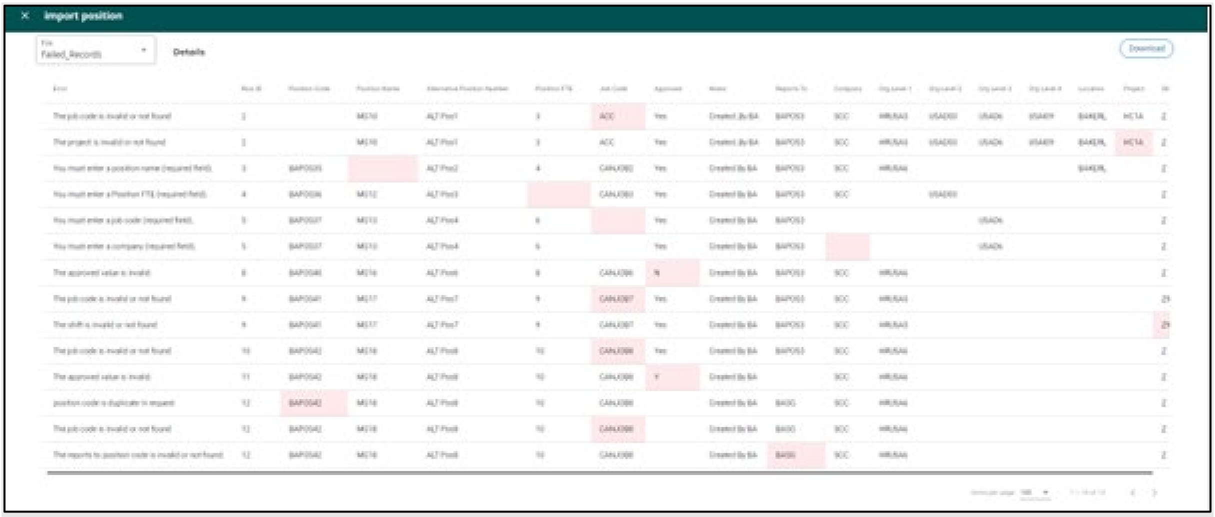


View Data Report

Administrators can view the data report of the executed integrations. To access the data report, administrators can select the event status or access them from the 'Summary' tab of the executed integration.



In the data report, you can select to view either the executed or unexecuted records from the template. For the unexecuted records, you can view the reason for their failure. You can also download the information in a .csv file format.



Administrators can address the data issue and re-upload the import file with the corrected record to initiate the import again.

Position Import Template

The Position Import template is used by administrators to add position data into UKG Pro. The template includes 16 columns, which represent individual fields that are either required or optional. After the template is completed, the file is saved and uploaded into UKG Pro's Position Automation.

Position Import Template Field Descriptions

The Position Import template fields table provides a list of the field names as they appear in the template, including if the field is required or optional, and additional details. Required fields are position fields that you must complete in the template to ensure the field data is successfully imported.

S. No.	Field Name	Type	Details
1.	Position Code	Required (*)	Provide a unique code for each position. If the position code is set to generate: • Automatically - leave the field blank. • Manually – enter a code in the field which is required.
2.	Position Name	Required	Provide a name for the position.
3.	Alternative Position number	Optional	Provide an Alternative Position Number. Maximum length is 50 characters.
4.	Position FTE	Required	Provide an FTE count for the position. The position FTE range is between 1-999999
5.	Job Code	Required	Provide a Job code to which the position will be tied. Employee assignments will be based on this.
6.	Approved	Optional	Indicates if the position needs to be approved. Enter a **Yes** or leave the field blank.
7.	Notes	Optional	Provides the user with a field where details about the position can be entered.
8.	Reports To	Optional	The name of the position code for the position to which this position reports.
9.	Company	Required	The component company code needs to be added under which this position will be created. Employee assignments will be based on this.
10.	Org level 1	Optional	The name of org level 1 for which the position will be created.
11.	Org level 2	Optional	The name of org level 2 for which the position will be created.
12.	Org level 3	Optional	The name of org level 3 for which the position will be created.
13.	Org Level 4	Optional	The name of org level 4 for which the position will be created.
14.	Location	Optional	The location code associated with the position that will be created.

15.	Project	Optional	Project code needs to be entered under which the position will be created.
16.	Shift	Optional	The code of the shift associated with the position that will be created.

Employee Import Template Field Descriptions

The Employee Import template fields table provides a list of the field names as they appear in the template, including if the field is required or optional, and additional details. Required fields are employee fields that you must complete in the template to ensure the field data is successfully imported.

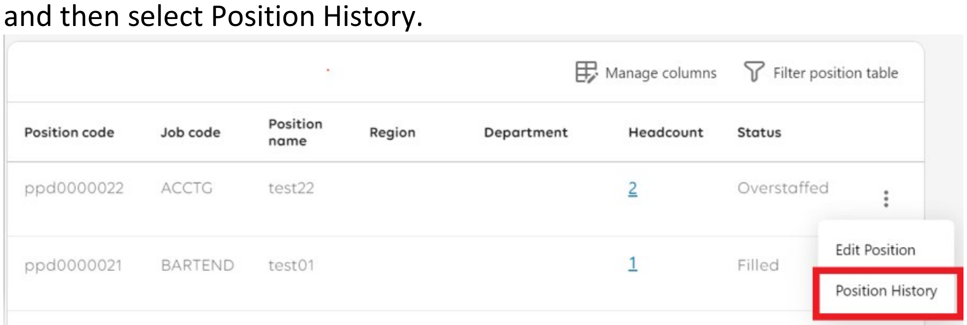
S. No.	Field Name	Type	Details
1.	Position Code	Required	The position code must be entered as it is assigned to the employee.
2.	Employee Number	Required	The employee number must be entered as it is assigned to the employee.
3.	Incumbent	Optional	The employee's name is optional so the field can be left blank.
4.	Employee FTE	Required	The employee FTE must be entered as it is assigned to the employee.

View Position History

View position history for approved positions that were created using Position Automation or the Import on the Position History page. When position details (including assignments, un-assignments, and FTE values) or organization details are changed, the position history is updated to reflect the changes.

Navigation: Menu > System Configuration > Position Automation > Positions

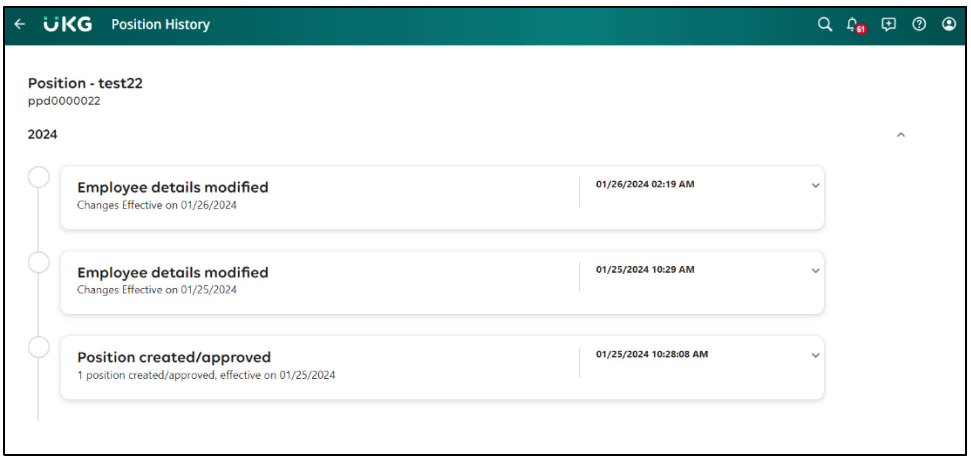
1. From the Position Insights page, select the ellipsis (More icon) to the right of the position and then select Position History.



The Position History page appears.

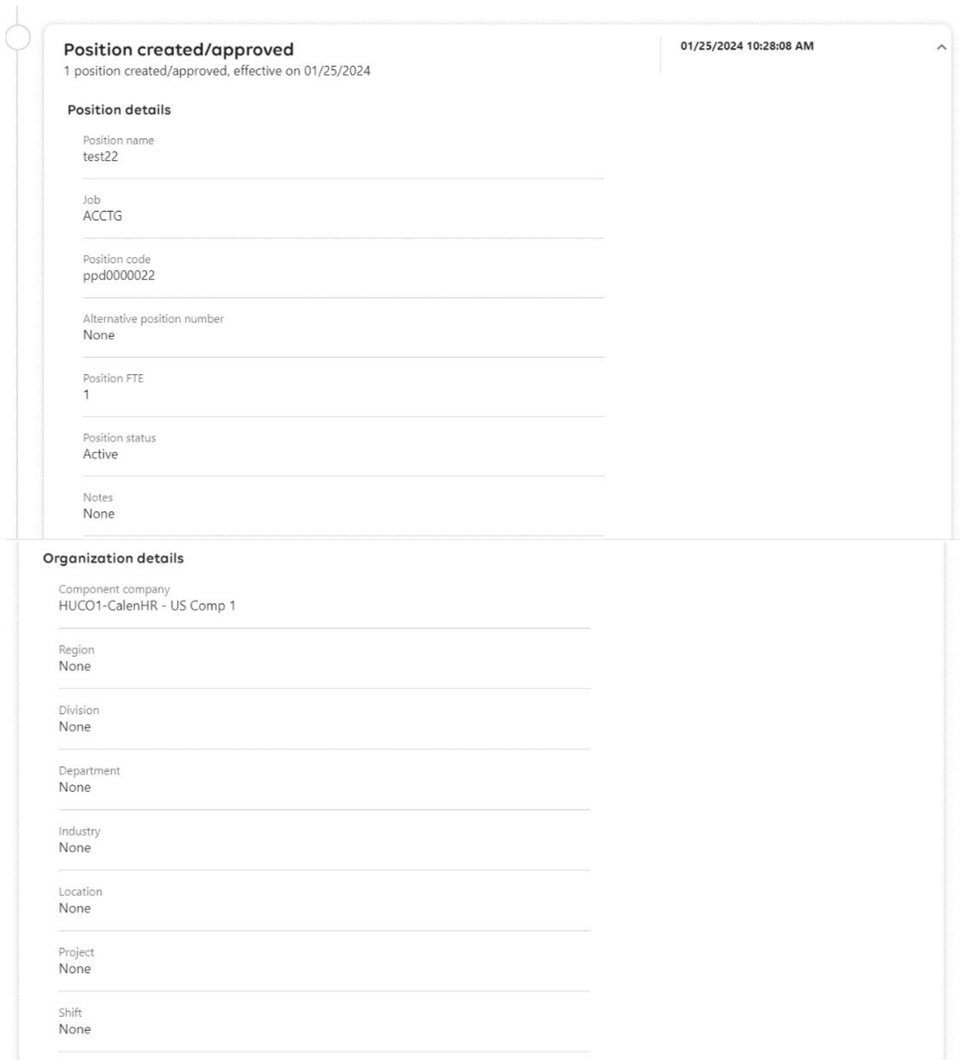
2. Review the updates to the approved position that appear as separate cards on the page. The cards provide a description of each change and include a date and time with the most recent change listed at the top.

    - Position – Position code
    - Position name
    - History cards in a year-by-year format

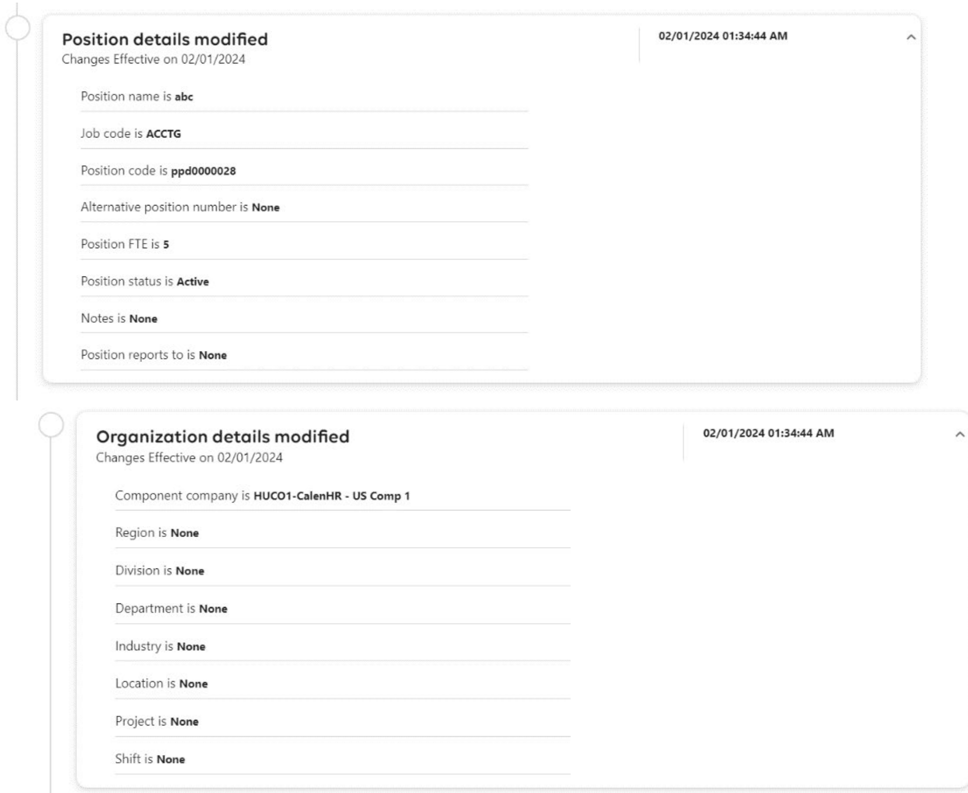


- When a position is approved, the **Position Created/Approved** card displays all the changed details of a position, including:

    - Modified date time
    - Effective date
    - Position details
    - Organization details
    - Employee details



- When position or organization details are modified in a position, the **Position Details Modified** and **Organization Details Modified** cards are displayed.



- When employees are added, deleted, or updated in a position, the **Employee Details Modified** card is displayed.