



Ultimate UltiPro Core Data Inbound Integration

Edge Integration Guide



TABLE OF CONTENTS

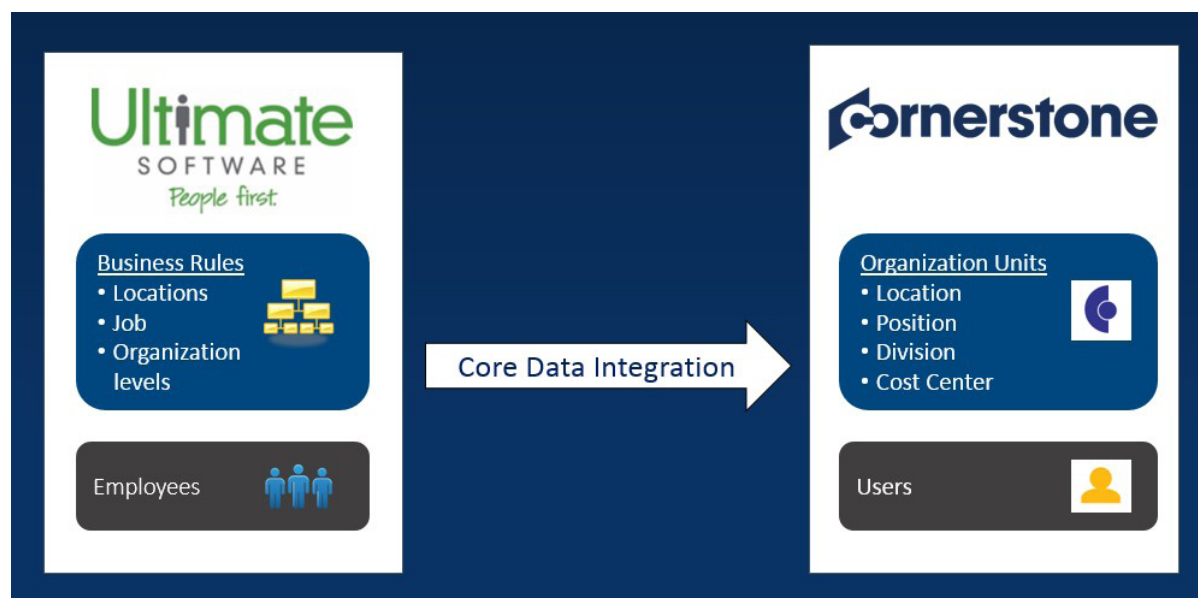
INTEGRATION OVERVIEW	3
Key Integration Details	3
Exclusions	3
CONFIGURATION	4
Edge Enablement	7
IMPLEMENTATION	9
WORKFLOW	10
OU Sync Workflow	10
APPENDIX	15
A. OU Mapping	15
B. User Mapping	17

VERSION HISTORY

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

INTEGRATION OVERVIEW

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



KEY INTEGRATION DETAILS

- This is a one-way, inbound synchronization from UltiPro 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

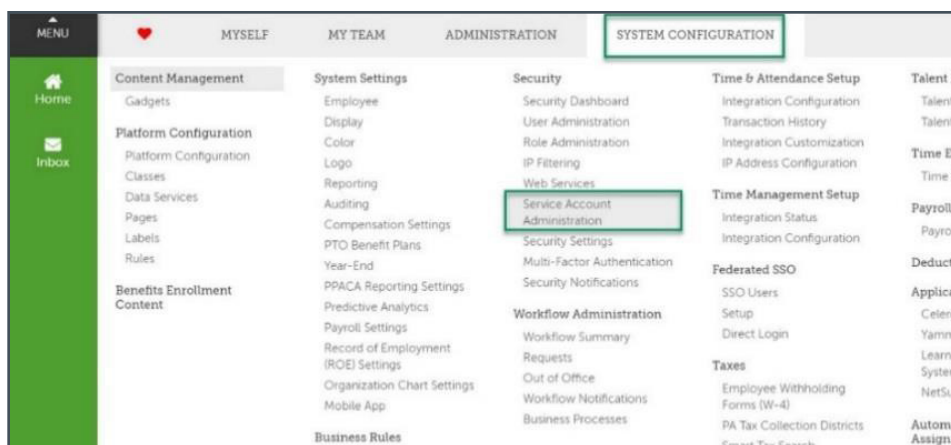
- Standard fields and OUs are supported in this integration. Custom Fields are not supported.
- The integration maps Cornerstone standard OUs to UltiPro's Jobs, Locations and 3 out of 4 Organization levels.
- UltiPro Employee APIs refresh every 3 hours. Hence, a force sync would not sync all users until the UltiPro API is refreshed

- In Cornerstone, users can only belong to a single OU within the same OU type. Thus, UltiPro 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 UltiPro. In this case, UltiPro 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 UltiPro. The OU ID and User ID are used as identifiers.
- Time zone is not obtained
- User language preference is obtained from UltiPro only when creating the user

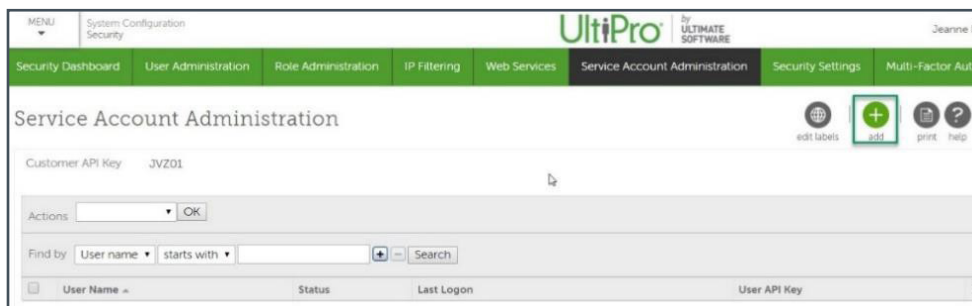
CONFIGURATION

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

The screenshot shows the 'Add/Change Service Account' page in the UltiPro System Configuration Security module. The page features a table of service accounts with columns for various permissions. The 'Company Configuration Integration' and 'Employee Export' rows are highlighted with a green border, indicating they are selected for configuration. The 'Save' button is visible in the top right corner of the table area.

Service Account	Employee Termination	SUI Tax Rate	Employee Process Hire	Employee Self Service API	Federated SSO User	Third Party Pay Service	PPACA Filing	Employee Onboarding Documents	PTO Plan Integration	Company Configuration Integration	Employee Export	Payroll Integration	Personnel Integration	Talent Integration	Tax Integration	Time Integration	Deduction Integration
Company Configuration Integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee Export	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

The screenshot shows the 'Service Account Administration' page in the UltiPro System Configuration Security module. The page displays the 'Customer API Key' field, which is currently blank. Below the field, there are 'Actions' and 'Find by' sections. The 'Save' button is highlighted in green, indicating it is the next step in the process.

User Name	Status	Last Logon	User API Key
P: [redacted] VC	Active	10/11/2017 12:00:48 PM	[redacted]

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

The screenshot displays the 'Web Services' configuration page in the UltiPro system. The navigation bar includes 'Dashboard', 'User Administration', 'Role Administration', 'IP Filtering', 'Web Services', 'Service Account Administration', and 'Security'. The main content area is titled 'Web Services' and contains the following configuration details:

- 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

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

The screenshot displays the 'Display Settings' page in the UltiPro system. The navigation bar includes 'Employee', 'Display', 'Color', 'Logo', 'Reporting', 'Auditing', 'Compensation Settings', 'PTO Benefit Plans', 'Year-End', 'PPACA Reporting Settings', and 'Predictive'. The main content area is titled 'Display Settings' and contains the following configuration details:

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

Additional settings include 'Transfer of Employee Documents' (Copy documents to new company during employee transfer) and 'Window Title Settings' (Hide Employee Number).

EDGE ENABLEMENT

1. Search and install / purchase “Ultimate UltiPro Core Data Inbound Integration” from Cornerstone’s Edge Marketplace
2. Open the Edge Setting Page

Edge

Back Ultimate UltiPro Core Data Inbound Integration

Settings Transaction History

Please fill in the fields below to configure your integration.

[Setup Instructions](#)

Customer API Key*

Tenant URL*

Username*

Password*

Contact Email*

Division: Organization Level 1

Grade: Organization Level 2

Cost Center: Organization Level 3

User Identifier: Employee ID

Full Sync Now

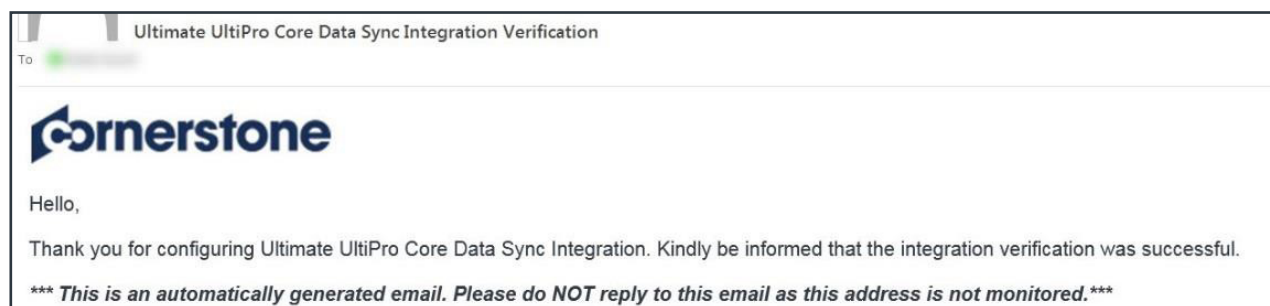
Delta Sync Now

Save Settings

3. Configure the Integration with:

- **Customer API Key** – UltiPro user API key
- **Tenant URL** - UltiPro 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** - UltiPro service account username
- **Password** - UltiPro 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 UltiPro organization level. If configured, mapped values should differ, otherwise set to None
- **Division** - Must be mapped to an UltiPro organization level. The value should be different from Grade & Cost Center mapped values
- **User Identifier:** Populates the User ID with UltiPro’s Employee ID or EmployeeNumber

- **Full Sync Now** - Forces a one-time transfer of all OU and User Records from UltiPro 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 UltiPro 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 UltiPro's Location and Job.)
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	Category
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
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.	Edge
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.	Core Administration

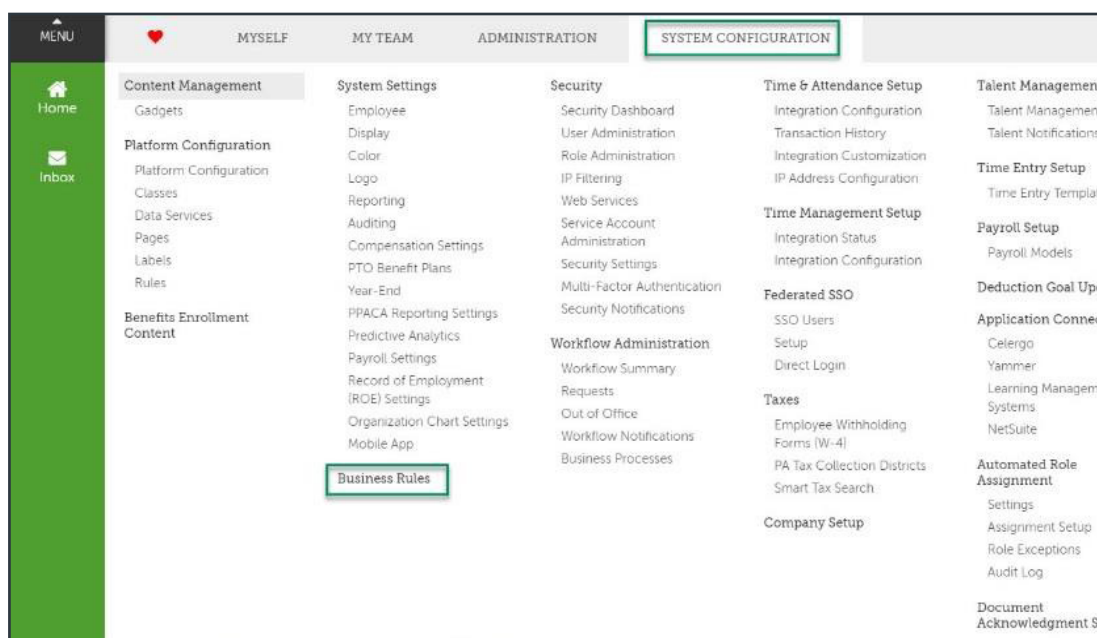
WORKFLOW

OU Sync Workflow

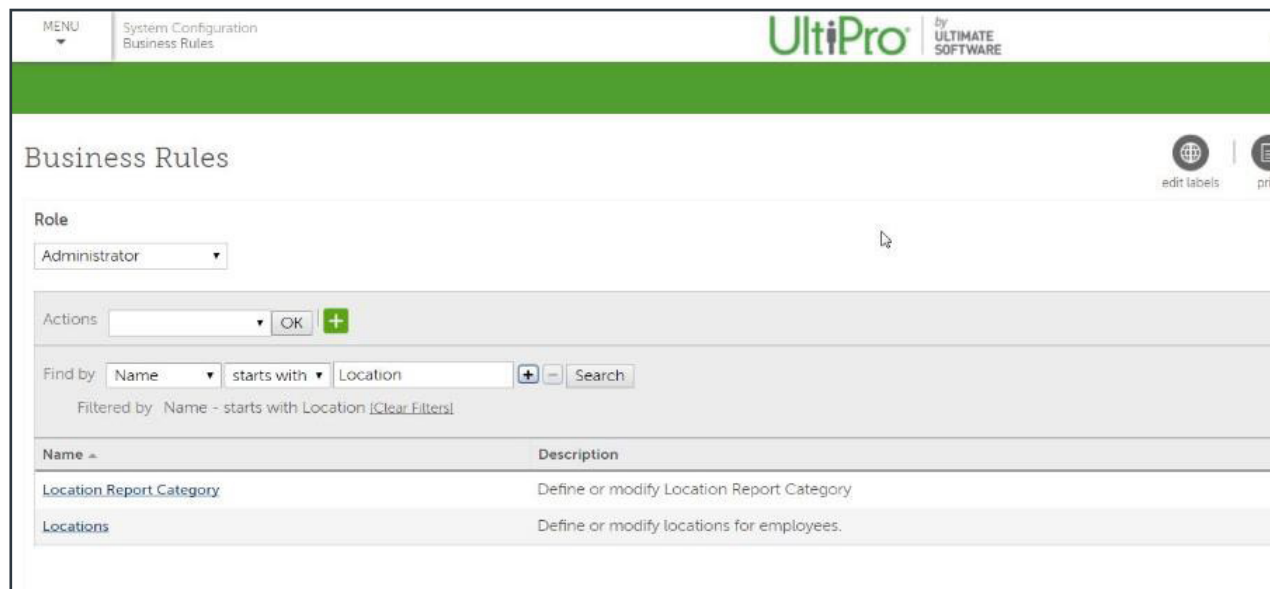
OU Sync Workflow: Creating an entity in UltiPro

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

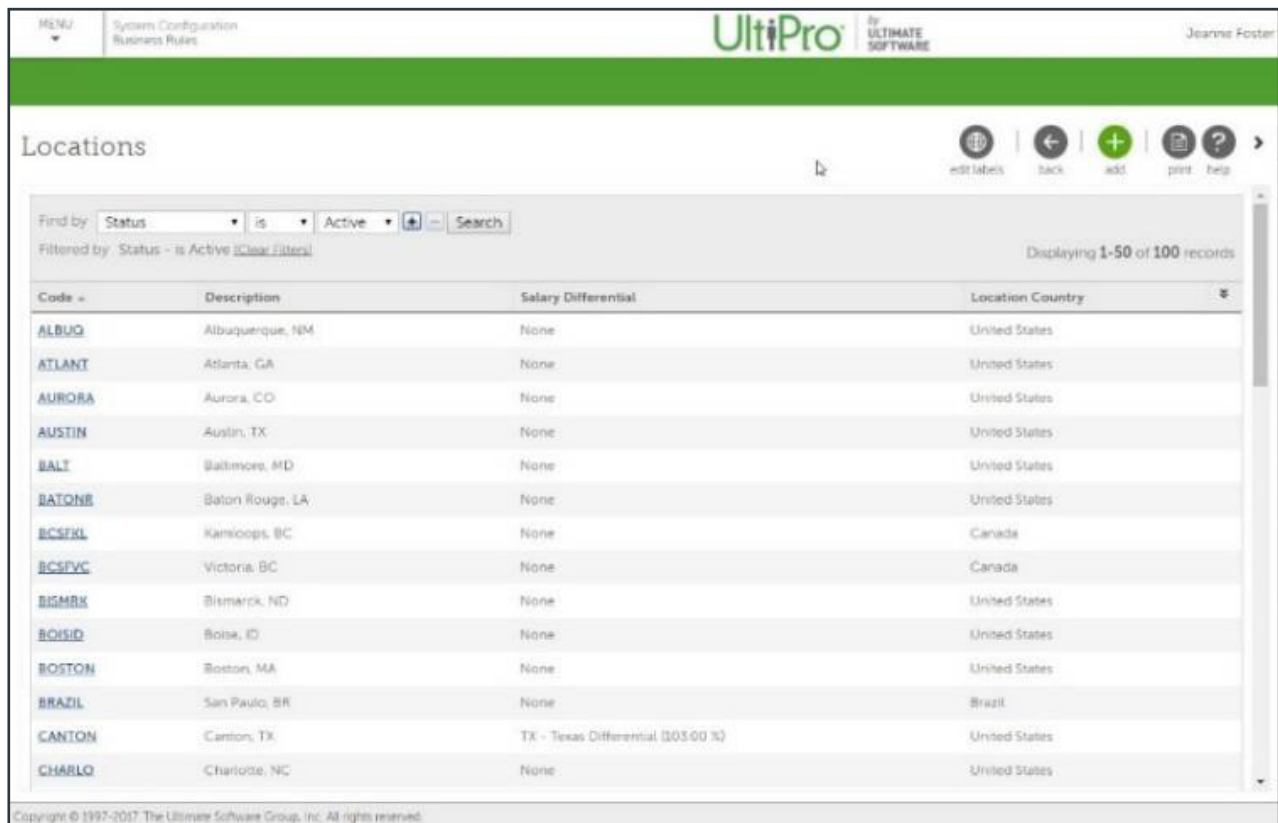
1. Navigate to "Business Rules"
(Menu > System Configuration > Business Rules)



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



3. Select the entity to display the existing values

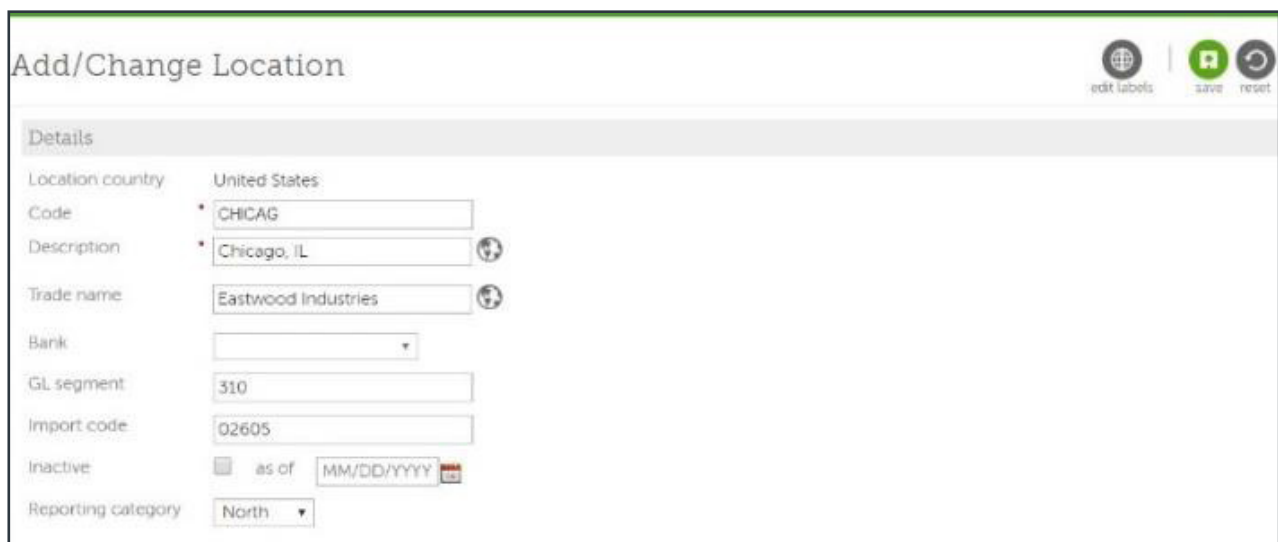


The screenshot shows the 'Locations' page in the UltiPro system. The page header includes 'MENU', 'System Configuration Business Rules', the 'UltiPro by ULTIMATE SOFTWARE' logo, and the user name 'Jeanne Foster'. The page title is 'Locations'. There are navigation icons for 'edit labels', 'back', 'add', 'print', and 'help'. A search bar is present with the criteria 'Find by Status is Active' and a 'Search' button. Below the search bar, it says 'Filtered by Status - is Active (Clear filters)' and 'Displaying 1-50 of 100 records'. The main content is a table with the following columns: Code, Description, Salary Differential, and Location Country. The table lists various locations such as ALBUQ, ATLANT, AUROBA, AUSTIN, BALT, BATONB, BCSEKL, BCSPVC, BISMAR, BOISEID, BOSTON, BRAZIL, CANTON, and CHARLO.

Code	Description	Salary Differential	Location Country
ALBUQ	Albuquerque, NM	None	United States
ATLANT	Atlanta, GA	None	United States
AUROBA	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
BISMAR	Bismarck, ND	None	United States
BOISEID	Boise, ID	None	United States
BOSTON	Boston, MA	None	United States
BRAZIL	San Paulo, BR	None	Brazil
CANTON	Canton, TX	TX - Texas Differential (05.00 %)	United States
CHARLO	Charlotte, NC	None	United States

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



The screenshot shows the 'Add/Change Location' form in the UltiPro system. The page header includes 'edit labels', 'save', and 'reset' icons. The form is titled 'Add/Change Location' and has a 'Details' section. The form fields are as follows:

- Location country: United States
- Code: CHICAG
- Description: Chicago, IL
- Trade name: Eastwood Industries
- Bank: (empty dropdown)
- GL segment: 310
- Import code: 02605
- Inactive: 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 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
Summary	6	6	6

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

Personation
Learning
Performance
Succession
Recruit
ILT
Content
Reports
Admin
Integration Suite

Organizational Units

Manage Location ?

Build the hierarchy of organisational units.

Select Organizational Unit

Location ▼ ?

Location

+ Add Location > View Hierarchy

Location

Location ID

Q Search

Include inactive

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

(7 Results)

Back

OU Sync Workflow: Updating an Entity in UltiPro

1. Go through the first 3 steps of “Creating an Entity in UltiPro”
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 UltiPro

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

The screenshot shows the 'My Employees' page in UltiPro. The page has a green header with the UltiPro logo and navigation tabs. Below the header, there are search and filter options. A table lists several employees with their details.

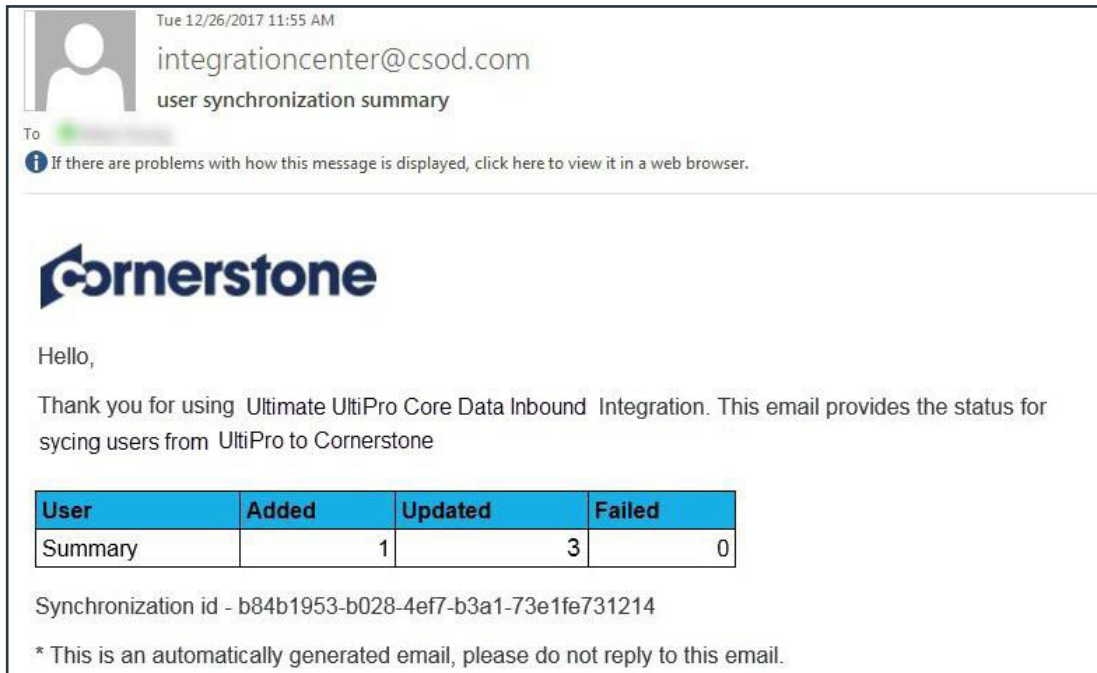
Name	Employee Number	Primary Work Phone	Extension	Primary Home Phone	Primary E-Mail	Status	Job	Location	Division
Abbott, Jose	262352135	(512) 227-9910	12208	(903) 297-5216	Jose.Abbott@ultimate.com	Active	External Maintenance	Canton, TX	Manufa
Adams, Herbert	000012409	(646) 224-1818	3214	(212) 290-7878	Herbert.Adams@ultimate.com	Active	Talent Administrator	New York NY	Adminis
Adams, John L.	262352143	(214) 224-1818	1618	(512) 298-9310	John.Adams@ultimate.com	Active	Internal Maintenance	Austin, TX	Manufa
Adams, Tomas	262352174	(737) 554-1800	61810	(903) 296-7908	Tomas.Adams@ultimate.com	Active	Assembler	Canton, TX	Manufa

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

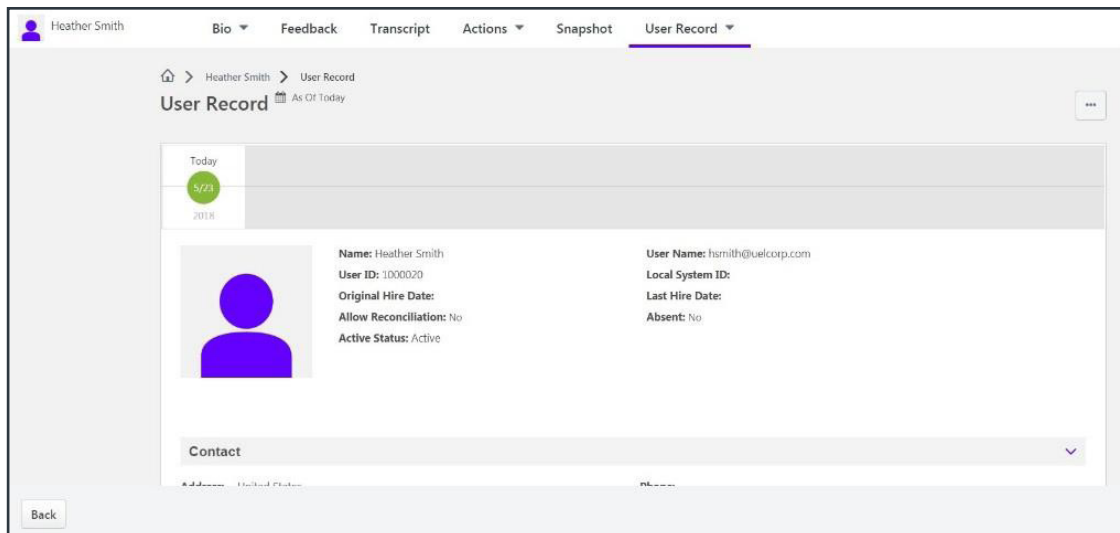
The screenshot shows the 'Hire an Employee' wizard in UltiPro. The wizard is a modal window that allows users to enter employee information. The 'Summary' tab is selected, showing a table of the entered information.

Request Information	Before	Submitted
Company	New	UEL Corporate
Operating country	New	United States
Prefix	New	
First	New	Heather
Preferred name	New	Heather
Middle	New	
Last	New	Smith
Former last	New	
Suffix	New	
Employee number	New	To be assigned
Time clock	New	

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



- Log into Cornerstone and validate user record



User Sync Workflow: Updating an Employee/User in UltiPro

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

APPENDIX

A. OU Mapping

Summary

Cornerstone	Ultimate
Position	Job
Location	Location
Division	Configurable Values: <ul style="list-style-type: none"> • org-levels1 • org-levels2 • org-levels3 • org-levels4
Grade	
Cost Center	

Position

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

Location

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

B. User Mapping

Cornerstone Field Name	Required	Values	UltiPro 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. https://connect.ultipro.com/employee-export-FAQ
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	