



Informatica® Cloud Data Integration

UltiPro Connector

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Preface

Use *UltiPro Connector* to learn how to read from UltiPro by using Cloud Data Integration. Learn to create an UltiPro connection, develop and run synchronization tasks, mappings, and mapping tasks in Cloud Data Integration.

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CHAPTER 1

Introduction to UltiPro Connector

You can use UltiPro Connector to securely read data from UltiPro and Time Management. Use Data Integration to migrate data that you read from UtilPro to other applications.

You can use the UltiPro connection in synchronization tasks, mappings, and mapping tasks. In a mapping, you can configure a Lookup transformation to represent an UltiPro object.

You can switch mappings to advanced mode to include transformations and functions that enable advanced functionality.

When you run a task, the agent uses the following APIs to access data based on the application module you specify in the UltiPro connection:

Employee Self-Service

Reads human resources, payroll, talent, and benefits data from UltiPro.

UTM Odata Services

Reads data from Time Management.

Events

Reads data specific to supported UltiPro events, such as the date and time events and the unique keys of the records associated with events.

Note: This connector is developed by Informatica partners, third-party system integrators, or customers. You can look up the Product Availability Matrix or Informatica Marketplace for more information.

Supported Objects and Task Operations

You can access the UltiPro application modules when you connect to UltiPro.

The following table lists the objects and task operations that UltiPro Connector supports for HR, Payroll, Talent, and Benefits modules:

Objects	Read	Insert	Update	Upsert	Delete	Lookup	Data Preview
Primary Address	Yes	No	No	No	No	Yes	Yes
Other Address	Yes	No	No	No	No	Yes	Yes
Allocation	Yes	No	No	No	No	Yes	Yes

Objects	Read	Insert	Update	Upsert	Delete	Lookup	Data Preview
Award	Yes	No	No	No	No	Yes	Yes
CompanyProperty	Yes	No	No	No	No	Yes	Yes
Contact	Yes	No	No	No	No	Yes	Yes
Deduction	Yes	No	No	No	No	Yes	Yes
Direct Deposit	Yes	No	No	No	No	Yes	Yes
Earning	Yes	No	No	No	No	Yes	Yes
Education	Yes	No	No	No	No	Yes	Yes
Employee	Yes	No	No	No	No	Yes	Yes
Employment History	Yes	No	No	No	No	Yes	Yes
Employment	Yes	No	No	No	No	Yes	Yes
General Ledger	Yes	No	No	No	No	Yes	Yes
General Ledger Recent Runs	Yes	No	No	No	No	Yes	Yes
Licence	Yes	No	No	No	No	Yes	Yes
Other Address	Yes	No	No	No	No	Yes	Yes
People	Yes	No	No	No	No	Yes	Yes
Payroll History Deduction	Yes	No	No	No	No	Yes	Yes
Payroll History Earning	Yes	No	No	No	No	Yes	Yes
Payroll History Summary	Yes	No	No	No	No	Yes	Yes
Payroll History Tax	Yes	No	No	No	No	Yes	Yes
Phone	Yes	No	No	No	No	Yes	Yes
Previous Address	Yes	No	No	No	No	Yes	Yes
Pto Accruals	Yes	No	No	No	No	Yes	Yes
Pto Requests	Yes	No	No	No	No	Yes	Yes

Objects	Read	Insert	Update	Upsert	Delete	Lookup	Data Preview
Skills	Yes	No	No	No	No	Yes	Yes
Taxes	Yes	No	No	No	No	Yes	Yes
Business Rule Job	Yes	No	No	No	No	Yes	Yes
Business Rule Location	Yes	No	No	No	No	Yes	Yes
Business Rule Org Level 1	Yes	No	No	No	No	Yes	Yes
Business Rule Org Level 2	Yes	No	No	No	No	Yes	Yes
Business Rule Org Level 3	Yes	No	No	No	No	Yes	Yes

The following table describes the objects and task operations that UltiPro Connector supports for the Time Management module through the Other application module:

Objects	Read	Insert	Update	Upsert	Delete	Lookup	Data Preview
Employee	Yes	No	No	No	No	Yes	Yes
Job	Yes	No	No	No	No	Yes	Yes
Location	Yes	No	No	No	No	Yes	Yes
Org Level 1	Yes	No	No	No	No	Yes	Yes
Org Level 2	Yes	No	No	No	No	Yes	Yes
Org Level 3	Yes	No	No	No	No	Yes	Yes
Org Level 4	Yes	No	No	No	No	Yes	Yes
Paycode	Yes	No	No	No	No	Yes	Yes
Pay Group	Yes	No	No	No	No	Yes	Yes
Pay Matrix	Yes	No	No	No	No	Yes	Yes
Project	Yes	No	No	No	No	Yes	Yes
Reason	Yes	No	No	No	No	Yes	Yes
Shift	Yes	No	No	No	No	Yes	Yes
Shift Del	Yes	No	No	No	No	Yes	Yes

Objects	Read	Insert	Update	Upsert	Delete	Lookup	Data Preview
Shift Lvl	Yes	No	No	No	No	Yes	Yes
Time	Yes	No	No	No	No	Yes	Yes
Schedule	Yes	No	No	No	No	Yes	Yes
Schedule Request	Yes	No	No	No	No	Yes	Yes
Time Sheet	Yes	No	No	No	No	Yes	Yes

The following table describes the objects and task operations that UtilPro Connector supports for Integration Events module:

Objects	Read	Insert	Update	Upsert	Delete	Lookup	Data Preview
Events	Yes	No	No	No	No	Yes	Yes

UltiPro Connector Example

You are a Human Resources administrator and you want to access the employee information in your organization. You can use Data Integration to read employee information from UltiPro and write it to the Oracle database. To read a list of triggered events, such as date, time, and record key, specify the Events application module in the UltiPro connection.

Create an UltiPro connection and use the connection in synchronization tasks, mappings, and mapping tasks.

To read the employee records that triggered the integration event, configure a parameterized filter in a mapping task. To read time data from Time Management, such as the number of hours worked, specify the Other application module in the UltiPro connection.

Administration of UltiPro Connector

As a user, you can use UltiPro Connector after the organization administrator installs the Secure Agent on the server that belongs to your organization.

For more information about installing a Secure Agent, see *Runtime Environments*.

Based on the data you want to extract, perform the following tasks:

1. Open a case with UKG to enable UltiPro Connector.
2. Create a service account in UltiPro to access the Employee Self Service API. Perform the following tasks:
 - a. Go to **Menu > Administration > Integration Studio > Integration Studio Dashboard > Service Accounts Graphic Tile**.
 - b. Use this service account information to create an UltiPro connection to the HR, Payroll, Talent, Benefits, and Integration Events application modules.

3. To create an UltiPro connection to the Time Management module, get the clock server URL and UTM ODataService username and password after submitting a case to UKG.
4. To read the HR, Payroll, Talent, and Benefits data when a specific Integration Event triggers, open a case with UKG to enable Integration Events for your organization.

CHAPTER 2

UltiPro Connections

You can use UltiPro connections to read data from UltiPro or Time Management. You can use UltiPro connections to specify targets in synchronization tasks, mappings, and mapping tasks.

You can create an UltiPro connection on the **Connections** page. You can then use the connection when you create a mapping or a task.

UltiPro connection properties

When you set up an UltiPro connection, you must configure the connection properties.

The following table describes the UltiPro connection properties:

Property	Description
Runtime Environment	The name of the run-time environment where you want to run the tasks.
Password	The password of the UltiPro service account. Specify one of the following passwords: <ul style="list-style-type: none">- To read HR, Payroll, Talent, and Benefits or Integration Events data, specify the password of the service account in UltiPro.- To read Time Management data, specify the ODataService password associated with UKG support.
Username	The user name of the UltiPro service account. Specify one of the following user names: <ul style="list-style-type: none">- To read HR, Payroll, Talent, and Benefits or Integration Events data, specify the user name of the service account in UltiPro.- To read Time Management data, specify the ODataService user name associated with UKG support.
Service Host Name	The organization domain of UltiPro to read data from the HR, Payroll, Talent, Benefits, or the Integration Events module. To get the service host name, navigate to UltiPro > Menu > System Configuration > Security > Web Services . Specify the service host name in the following format: <code>service\$.ultipro.com,</code> where \$ is a numeric value. To read the Time Management data, specify the clock server URL provided by UKG support.

Property	Description
Customer API Key	<p>The Customer API key when you want to read data from the HR, Payroll, Talent, Benefits, or Integration Events module.</p> <p>To get the customer API key, navigate to Dashboard > Service Accounts graphic tile > UltiPro > Menu > Administration > Integration Studio > Integration Studio.</p>
User API Key	<p>The User API key when you want to read data from the HR, Payroll, Talent, Benefits, or Integration Events module.</p> <p>To get the user API key, navigate to UltiPro > Menu > Administration > Integration Studio > Integration Studio Dashboard > Service Accounts graphic tile</p> <p>To read the Time Management data, specify None as the value of the user API key.</p>
Application Module	<p>Determines the type of objects that you can access through the connection.</p> <p>You can select from the following modules to access data from Ultipro:</p> <p>HR, Payroll, Talent, and Benefits</p> <p>Access HR, Payroll, Talent, and Benefits objects.</p> <p>Integration Events</p> <p>Access the Integration Events object to read subscribed Integration Events, such as the date and time of the completed events.</p> <p>Other</p> <p>Access Time Management objects.</p>

CHAPTER 3

Synchronization Tasks with UltiPro

Use a Synchronization task to synchronize data between a source and target.

You can configure a synchronization task using the Synchronization Task wizard.

When you create a task, you can associate it with a schedule to run it at specified times or on regular intervals. Or, you can run it manually. You can monitor tasks that are currently running in the activity monitor and view logs about completed tasks in the activity log.

UltiPro Sources in Synchronization Tasks

When you configure a synchronization task to use an UltiPro source, you can configure the source properties.

The source properties appear on the **Source** page of the Synchronization Task wizard when you specify an UltiPro connection.

The following table describes the UltiPro source properties:

Property	Description
Connection	Name of the source connection.
Source Type	Source Type. Select one of the following objects: <ul style="list-style-type: none">- Single object.- Multiple objects.
Source Object	Select the source object for the task.

Create a Synchronization Task

To insert data to UtilPro, create a synchronization task.

To set up a synchronization task in Data Integration, perform the following tasks:

1. From the Integration Designer, click **New > Tasks**.

2. Select **Synchronization Task**, and click **Create**.
The **Definition** tab appears.
3. Specify the task name, provide a description, and select the task operation **Insert**.
4. Click **Next**.
The **Source** tab appears.
5. Select the source connection, source type, and source object for the task, and click **Next**.
6. Select the target connection, target type, and target object for the task, and click **Next**.
The **Target** tab appears.
7. Assign filters to a task To select all rows, click **Data Filters**, and then click **Next**.
8. On the **Field Mapping** tab, map the source fields to the appropriate target fields.
9. Click **Next**.
The **Schedule** tab appears.
10. Click **Save** and then **Finish**.
11. From the Explore page, select the task, and click **Actions > Run**.
After you run the task, you can monitor the status of the logs in the Monitor page.

Rules and Guidelines for Data Filters

Consider the following rules and guidelines for data filters in tasks:

1. You can use one condition for each filter. For example, you cannot use both simple and advanced filters on the same condition.
2. You can apply a filter to an object that is a collection. The collection must be a primary source object. For more information about collections, see ["Rules and Guidelines for UltiPro Objects" on page 16](#).
3. When you configure the source for UltiPro history objects such as payroll, you must provide a filter.
4. Use advanced filters when you want to override the filter logic. Advanced filters use Odata syntax. The Secure Agent overrides the filter to the API without conversions.

CHAPTER 4

Mappings and Mapping Tasks with UltiPro

Use the Data Integration Mapping Designer to create a mapping. In advanced mode, the Mapping Designer updates the mapping canvas to include transformations and functions that enable advanced functionality.

UltiPro Sources in Mappings

To read data from UltiPro, configure an UltiPro object as a Source transformation in a mapping. You can configure a Source transformation to represent a single UltiPro source.

Specify the name and description of the UltiPro source. Configure the source properties for the source object.

The following table describes the UltiPro source properties that you can configure in a Source transformation:

Property	Description
Connection	Name of the source connection.
Source Type	Type of the source object. Select Single Object, or Multiple Objects.
Source Object	Name of the source object. Select the source object for a single source.

The following table describes the Query Options of UltiPro sources that you can configure in a Source transformation:

Query Options	Description
Filter	Filter value in a read operation to fetch records. Use the following filters: <ul style="list-style-type: none">- Complete Parameterized- Not Parameterized- Advanced
Sort	Not Applicable.

The following table describes the advanced properties of UltiPro sources:

Advanced Property	Description
Tracing Level	<p>Sets the amount of detail that appears in the log for the source.</p> <p>Use the following tracing levels:</p> <ul style="list-style-type: none"> - Terse - Normal - Verbose Initialization - Verbose <p>Default is normal.</p>

Rules and Guidelines for UltiPro Objects

Consider the following rules and guidelines for UltiPro objects in tasks:

- When you configure multiple objects for HR, payroll, and benefits integrations, you can add them as sibling objects.
For example, when exporting fields from the Person and Phone objects, you must add the Phone object as the primary source object. You can then add the related Person object.
- When you add an UltiPro object or one of its related collections in a task, you must follow a specific order. You must add the object that is a related collection as a primary object. If you do not add the related collection as a primary object, the integration will contain duplicate records.
The following table describes the collections related to each object:

Objects	Related Collections
Employee	Contacts Employment Details Earnings Configurable Fields
Person	Phones Skills Educations Licenses Awards PreviousEmployments PersonConfigurableFields

Objects	Related Collections
Employment	Allocations CompanyProperties ConfigurableFields Deductions DirectDeposits PtoAccruals PtoRequests Taxes
Phone	Configurable Fields
Primary Address	Configurable Fields
Business Rule Job	Configurable Fields
Business Rule Location	Configurable Fields
Business Rule Org Level1	Configurable Fields
Business Rule Org Level2	Configurable Fields
Business Rule Org Level3	Configurable Fields
Business Rule Org Level4	Configurable Fields

Collection is configured correctly as the primary object

Source Object	Relationship
Phone	
People_Phones_1	People_Phones_1

Note: When you add a primary source object, you can add the additional objects based on their relationship to the primary object People_Phones_1, not the object name Person. If two objects that you want to add are not related to each other in a one-to-many relationship, you can add objects in any order based on their relationship.

CHAPTER 5

Troubleshooting with UltiPro

The solution to the following situations might help you troubleshoot common issues associated with UltiPro Connector:

Unable to install the Secure Agent.

You can install the Secure Agent in an accessible location within your network. Verify whether you have the access permissions for the computer or server where you want to install the agent.

A proxy setting error appears when you test the connection.

Verify the proxy settings in your network. You must enter the IP address on your proxy server for the Secure Agent. If the stated solution fails, you can contact your IT staff to solve outbound request issues.

The session log shows a proxy server error, although the task is successful.

When you read data from UltiPro, the session log shows proxy error, although the task is successful. In such cases, ignore the error in the session log.

Java Heap Error or Out of Memory Exception occurs when you run a task.

Verify the health and environment of the Secure Agent. The Secure Agent must be running.

Unable to view data from UltiPro.

You can perform the following actions to view data from UltiPro:

- Verify your host name.
- Verify the following configurations:
 - Customer API.
 - User API.
 - User name and password associated with your service account.

Test connection fails when you connect to UltiPro.

When you use the HR, Payroll, Talent, and Benefits application module, you must verify the access permissions to the Employee Self-Service API.

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