

# UKG Testing Made Easy

---



## Initial Setup & Configuration Guide

### Overview

In this guide you will learn how to setup the following configuration to ensure your TestAssure Platform & UKG Solution can communicate properly.

# Table of Contents

<b>OVERVIEW .....</b>	<b>1</b>
<b>UKG DIMENSIONS.....</b>	<b>3</b>
SETTING UP A UKG DIMENSIONS USER FOR TESTASSURE.....	3
<i>Super User Person Record Setup .....</i>	<i>3</i>
GENERATING THE QR CODE VALUE FOR THE SUPER USER ACCOUNT .....	3
SETTING UP A TEST TARGET(S) IN TESTASSURE.....	5
<i>Connection Details .....</i>	<i>6</i>
<i>Access Credentials.....</i>	<i>7</i>
<i>Integration Endpoint .....</i>	<i>7</i>
TEST DATA MANAGEMENT .....	8
CREATING A TESTASSURE TEST SUITE IN TESTASSURE.....	10
SETTING UP YOUR PERSONA(S) .....	11
UNDERSTANDING WHAT’S REQUIRED FOR AUTOMATED TESTS. ....	13
<b>UKG PRO.....</b>	<b>15</b>
SETTING UP A UKG PRO USER FOR TESTASSURE .....	15
CONFIGURING UKG PRO TO ENABLE TESTING AUTOMATION.....	15
<i>User API Key &amp; Customer Key .....</i>	<i>15</i>
<i>Service Account Setup.....</i>	<i>15</i>
SETTING UP A TEST TARGET(S) IN TESTASSURE.....	16
<i>Connection Details .....</i>	<i>18</i>
<i>Access Credentials.....</i>	<i>18</i>
SETTING UP A TEST SUITE IN TESTASSURE .....	18
HOW PERSONAS ARE USED WHEN TESTING AGAINST UKG PRO .....	19

# UKG Dimensions

## Setting up a UKG Dimensions User for TestAssure

TestAssure requires a super user account with sufficient privileges to perform the automated tests across the various entitlements available in WFD and WFC.

### Super User Person Record Setup

*Access Profiles:*

- Function Access Profile – Super Access
- Display Profile – Super Access
- Notification Profile – Control Center Only
- Generic Data Access Profile – All Access with an effective from the current day

*Contacts:*

- Email – User’s email address; this is required for customers with MFA enabled. It will allow you to login as the super user without needing the authenticator issued token. It will also enable you to independently reset the password upon its expiration.
  - To reduce email notifications, ensure Notification Profile is set to Control Center Only.

*Manager Role - General:*

- Pay Codes "Edit" Profile - All Pay Codes
- Pay Codes "View" Profile - All Pay Codes
- Work Rule Profile - All Work Rules
- Labor Category Profile (if used by the solution) – All Labor Categories
- Manager Role Employee Group - Employee Group with All Org Groups effective dates should be 01/01/1900
- Manager job transfer set – All Organizational Groups effective dates should be 01/01/1900

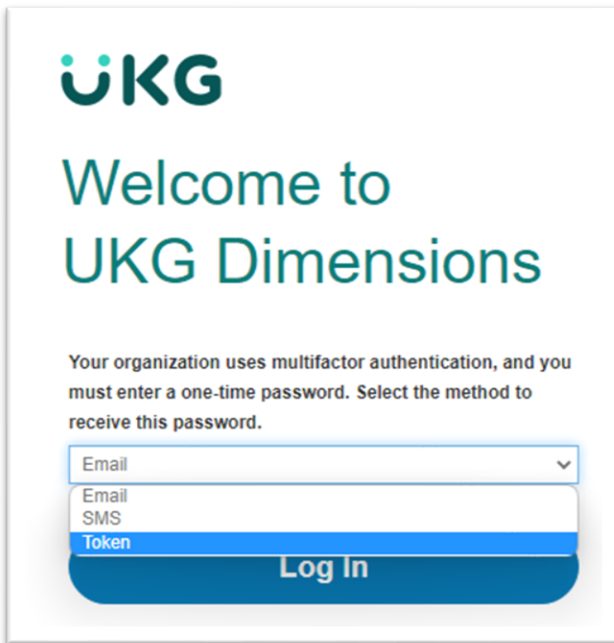
*Manager Role - Scheduler:*

- Schedule Group Profile - All Schedule Groups
- Shift Template Profile - All Shift Templates
- Pattern Template Profile - All Pattern Templates
- School Calendar Profile (if used by the solution) – All School Calendars
- Forecasting Category Profile (if used by the solution and currently only used for Person Import integration testing) – All Forecast Categories

## Generating the QR Code value for the Super User Account

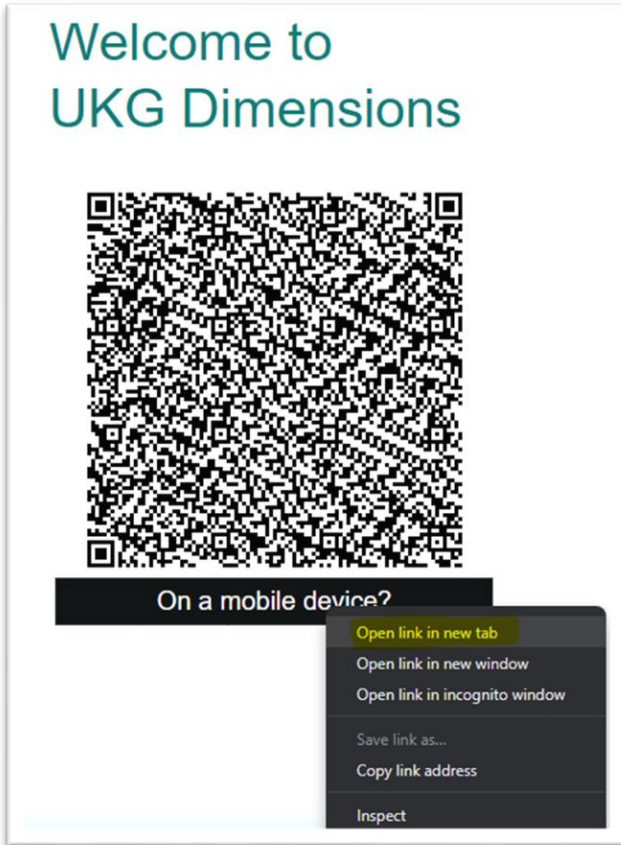


This step is required for customers with MFA enabled. After creating the super user account, log in as that super user. You will be prompted to select the method to receive the multifactor authentication password. Select “Token” and click Log In.



The image shows a screenshot of the UKG Dimensions login interface. At the top left is the UKG logo. Below it, the text reads "Welcome to UKG Dimensions". A message states: "Your organization uses multifactor authentication, and you must enter a one-time password. Select the method to receive this password." Below this message is a dropdown menu currently set to "Email". The dropdown is open, showing three options: "Email", "SMS", and "Token". The "Token" option is highlighted with a blue background. Below the dropdown is a blue "Log In" button.

The system will display a QR code. Right-click on the “On a mobile device?” button and open the link in a new tab. Then go to the new tab and copy the URI in the address bar.



The value of the URI should look like this:

```
otpauth://totp/r9evl-mastertenant.evl.mykronos.com:221028150148182Test?secret=SSO3EZZ5M4VWS2CZFOKYDQZKZY&issuer=r9evl-mastertenant.evl.mykronos.com&digits=6&period=30
```

**Do not lose this code**, it will be needed in [setting up the Test Target in TestAssure](#), for the field "User MFA Secret".


Next, using your favorite Authenticator app, scan the QR code to generate a new entry in the app. Use the token from the Authenticator app to complete the login in Dimensions. Once done, the super user is now setup to login with token. Take the URI copied earlier and use it in the "User MFA Secret" field in Test Target.

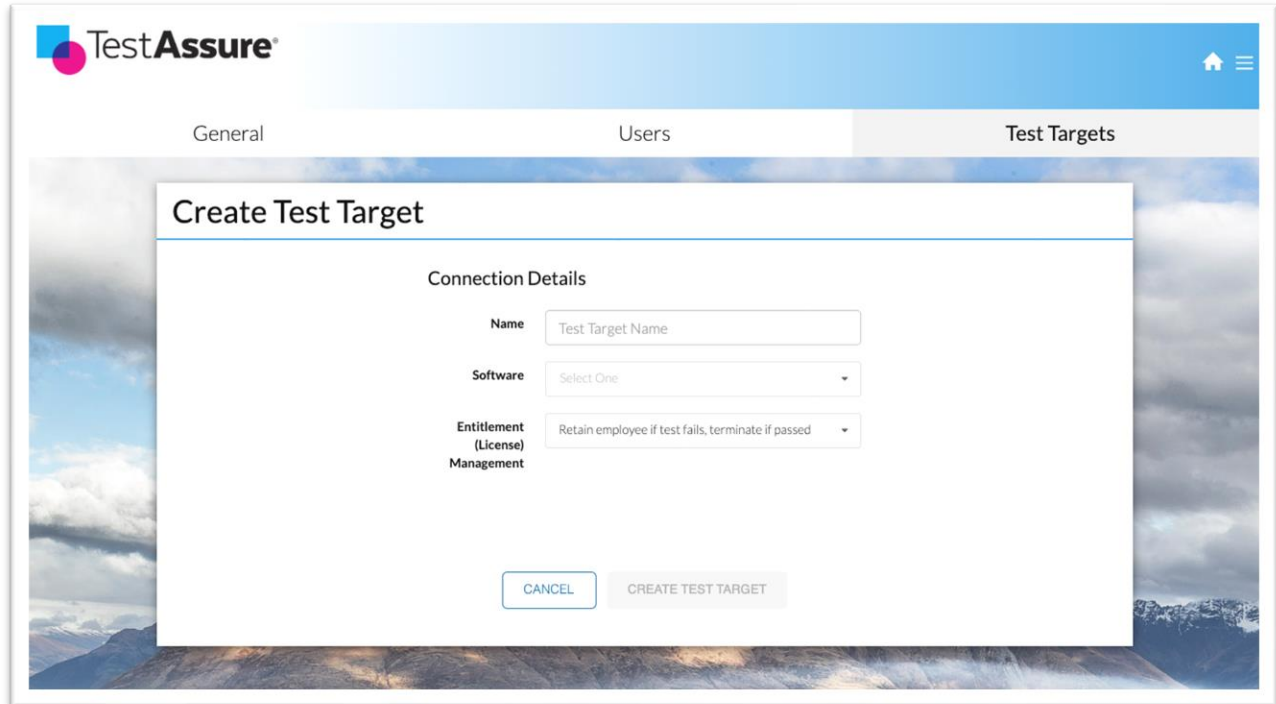
If you lose the URI and can no longer generate time-based tokens, contact UKG Dimensions support to reset the employee.

## Setting up a Test Target(s) in TestAssure

In TestAssure, we refer to the UKG Dimensions environment you wish to run your automated tests against as the "Test Target". To make sure your data remains secure, both within TestAssure and on your WFD environment, we must configure how TestAssure will communicate with your WFD solution.

Let's start by access the TEST TARGETS config screen from your TestAssure tenant:

1. Using the  (hamburger) icon in the top right of your screen access the SETTINGS
2. From here you should now be able to click on the TEST TARGETS tab and click "Create a new Test Target". You should see something like this:



**NOTE** – if you do not see any of the above options, you have insufficient user access/privileges, please contact [support@testassure.com](mailto:support@testassure.com) or find out who your TestAssure Admin User is within your organization.

3. From here please insert a description of the environment such as "WFD Development" and from the Software drop down select "UKG Dimensions".
  - a. You should now see the fields capture in "Figure 1.0 – Create Test Target" as seen below
4. Proceed to fill in the following details – Note not all values are required and this guide will focus on the basics needed to execute automated tests. Please contact support for more information.

### Connection Details

We've already setup the Name and Software so that leaves the following three options:

- App Key
  - As of Pro WFM 2023.R2.1 release, the App Key is no longer needed. The My Apps setup page is also no longer available. **Put any alphanumeric value in the App Key field in TestAssure to avoid authentication errors.** Once the App Key is removed for all customers, TestAssure will remove this field from the Test Target.
- Host
  - This is your WFD URL with "/api" appended to the end. For example, if you sign into your WFD environment and your URL says "acmecorp.cfn.mykronos.com/#/" you would insert the following to the HOST value:

- <https://acmecorp.cfn.mykronos.com/api>
- Entitlement (License) Management
  - This provides you one of three options for how you want TestAssure to manage the employee licenses that are generated when you run automated tests. You can always change your setting at any time in the future.
    - Retain all test employees
      - This options means the generated employee will retain the WFD licenses assigned to them, regardless if the test passes, or fails.
      - This is helpful if you want to generate test data in Dimensions and have it available for review within Dimensions.
    - Retain employee if test fails, terminate if passed
      - This should be your default for general Test Execution.
      - If a Test Case fails, the licenses will be retained so you can triage the issue in your WFD environment. If the Test Case passes then we can release the license.
    - Terminate all test employees
      - This should be used when you have a very limited number of licenses available.
      - By terminating the generated employee TestAssure releases all licenses as soon as the test is executed.

### Access Credentials

- Username – this is the user you created for TestAssure to connect to your WFD environment
- Password – this is the password for the Username
- Client ID & Client Secret – These are alphanumeric values that are provided by UKG Support team. Please reach out to them if you do not have those values
- PGP Public Key – please leave this blank.
- User MFA Secret – the QR Code value. See section [Generating the QR Code value for the Super User Account](#) for information on how to get this value.
- Test Employee Email – the default email address for test employees generated from TestAssure. Recommended to use for customers with MFA enabled. It will allow you to login as the test employee without needing the authenticator issued token.

### Integration Endpoint

This is used for advanced integration testing and will be configured by your TestAssure consultant.

### Create Test Target

**Connection Details**

Name:

Software:

App Key:

Host:

Entitlement (License) Management:

**Access Credentials**

Username:

Password:

Client ID:

Client Secret:

PGP Public Key:

**Integration Endpoint**

SFTP Host:

SFTP Username:

SFTP Password:

SFTP Port:

Figure 1.0 – Create Test Target Screen

## Test Data Management

Once you have a Test Target saved, you will then see it listed as an available Test Target. From the following screen we can schedule our Test Data Management Delete job using the Calendar Icon indicated below:

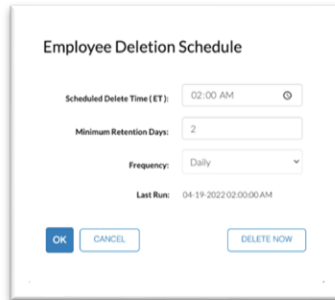
TestAssure
⌵

General
Users
Test Targets

Software	Name	Actions
UKG Dimensions	Agilea-2	<input type="button" value="Calendar"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
UKG Pro	UKG Pro	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
UKG Workforce Central	WFC Dev	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Clicking on the calendar icon will bring up this pop-up where you can schedule the following:





The image shows a configuration window titled "Employee Deletion Schedule". It contains the following fields and controls:

- Scheduled Delete Time (ET):** A text input field containing "02:00 AM" with a calendar icon to its right.
- Minimum Retention Days:** A text input field containing the number "2".
- Frequency:** A dropdown menu currently set to "Daily".
- Last Run:** A text label showing "04-19-2022 02:00:00 AM".
- Buttons:** Three buttons are located at the bottom: "OK" (blue), "CANCEL" (white with blue border), and "DELETE NOW" (white with blue border).

- Schedule Delete Time (ET)
  - At what time, in Eastern Standard time, do you want to have this job run. We suggest running this off hours.
- Minimum Retention Days
  - How many days, in the past, should we retain generated employee data.
- Frequency
  - How frequently do you want this job to run.


Example: the above configuration will run the Delete Job every day, at 2am EST and will delete all Test Data that was generated more than 2 days in the past.

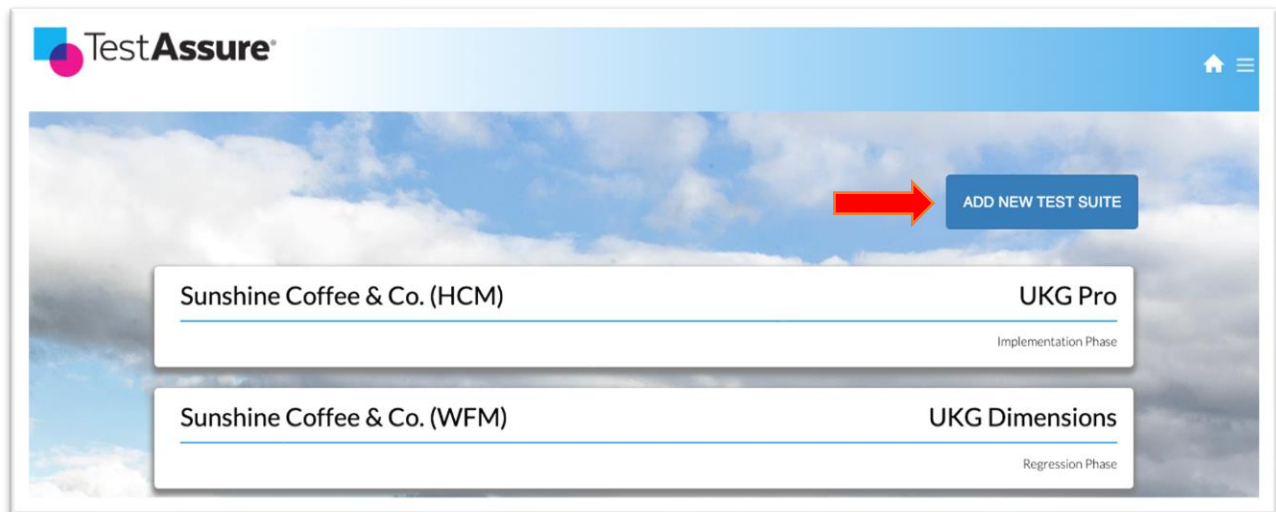
Note – you can always run the DELETE NOW button to run this ad-hoc.

## Creating a TestAssure Test Suite in TestAssure

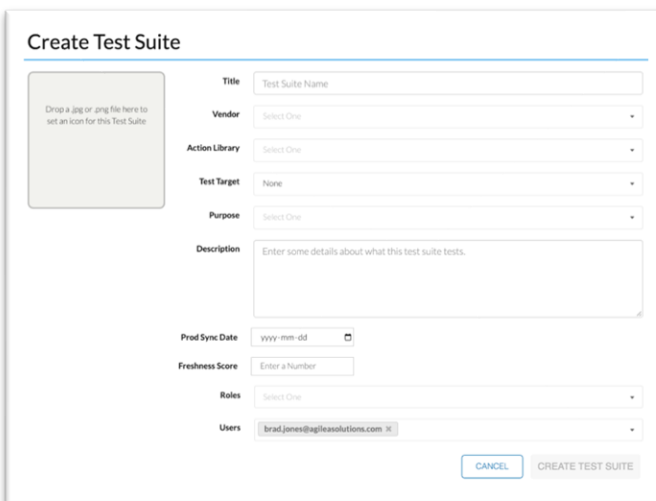
A Test Suite, in TestAssure, refers to a container of Test Cases that can be executed against a specific type of software such as UKG Dimensions or UKG Pro. You may have as many Test Suites as you like, but typically you just have one per software solution you are looking to test against.

Let's create your first Test Suite:

1. Access the HOME screen by clicking the  home icon in the top right (the one to the left of the Hamburger menu)
2. You should now see the TestAssure HOME screen. You may, or may not already have various Test Suites created. The below image shows two Test Suites already created. Click the "ADD NEW TEST SUITE" button.



3. The following screen will allow you to configure your Test Target

The screenshot shows the "Create Test Suite" form. It has a title "Create Test Suite" and a sub-header "Test Suite Name". On the left is a placeholder for an icon with the text "Drop a .jpg or .png file here to set an icon for this Test Suite". The form fields are: Title (Text Suite Name), Vendor (Select One), Action Library (Select One), Test Target (None), Purpose (Select One), Description (Text area), Prod Sync Date (Date picker), Freshness Score (Text input), Roles (Select One), and Users (Text input with "brad.jones@agileasolutions.com" entered). At the bottom are "CANCEL" and "CREATE TEST SUITE" buttons.

- **Title** – Name you wish to call the Test Suite
- **Vendor** – Select UKG
- **Action Library** – Select UKG Dimensions
- **Test Target** – Select the Test Target from you just created
- **Purpose** – Select "Build Phase" (can be changed later)
- Leave "Prod Sync Date", "Freshness Score" and "Roles"
- **Users** - Add any additional Users you want to have access to this Test Suite.

4. Click "Create Test Suite" when all the required fields are filled in & congratulations you're done.

## Setting up your Persona(s)

Now that our Test Suite is configured, and connected to our Test Target, we can open up our Test Suite and start writing Tests. There's just one more step we need to configure before that. We need to create a Personas.

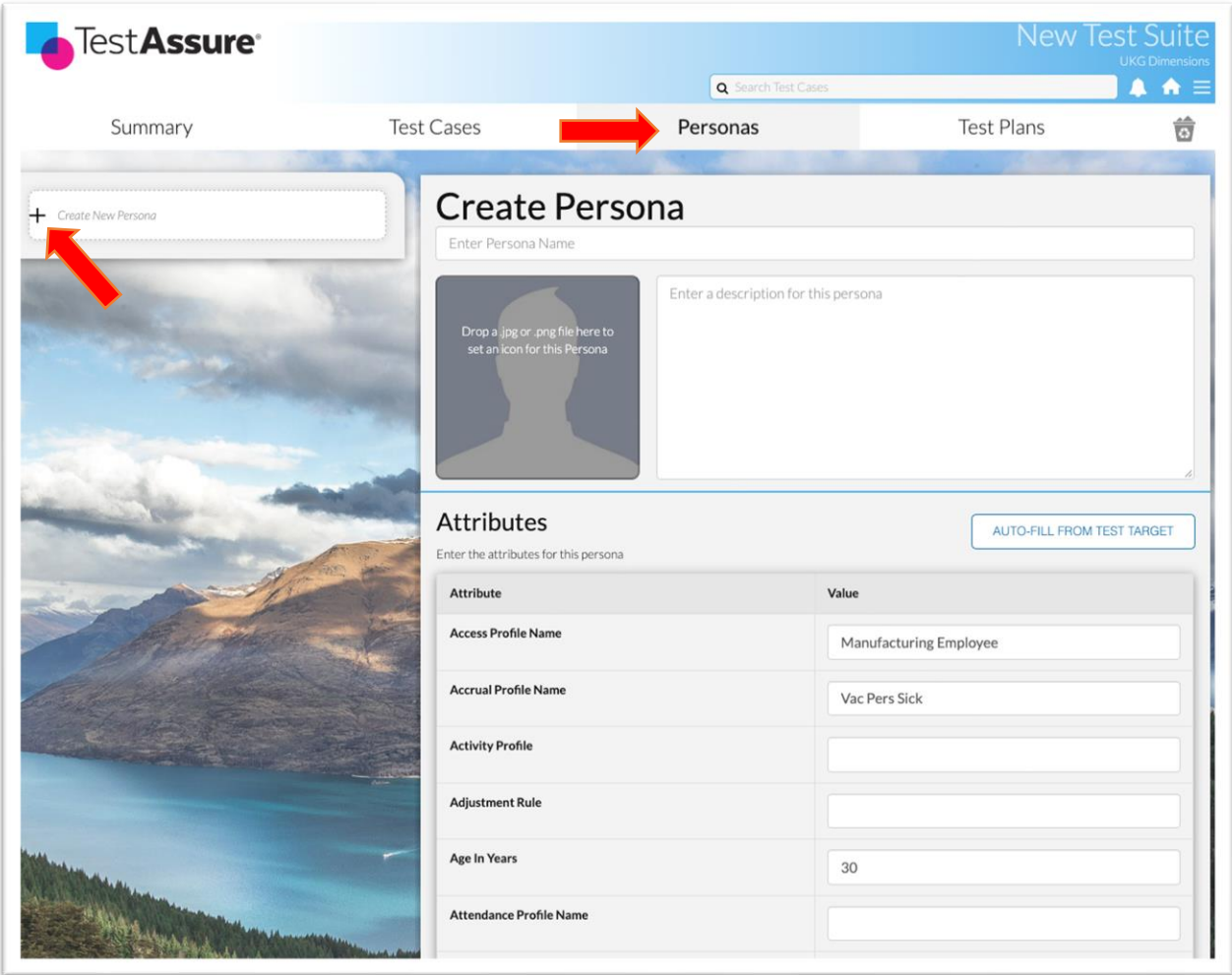
In TestAssure, we use Personas to represent groups of employees within your organization, without actually storing their personal information. An example of a Persona might be:

- Full Time Hourly Employees
- Salaried & Corporate Employees
- Union Employees

When executing automated tests, a test employee will be automatically created based on the Persona specified. Test employees are clearly identifiable: The last name is always "Test" and the first name and ID are timestamps indicating when the employee was created. Example: Test, 220530131517869. Test employees require a seat license – refer to section **Test Data Management** for more information on how to delete test employees.

Let's setup a Persona now:

1. From the Home screen – click on your newly created Test Suite
2. From here click on the Personas tab on the top navigational ribbon and then the "+" icon beside the Create New Persona on the right. You should see the following screen:



Now we have two options for creating our first Persona:

1. Create them from scratch filling in the Persona Attributes
2. Create them based of a real employee in your Test Target

**NOTE 1:** If you're an advanced user, or you're editing an existing Persona use Option 1, otherwise use Option 2.

**NOTE 2:** Always populate the Function Access Profile (FAP) and ensure it does not have Design Integrations permission set to Allowed. This setting controls if test employees created via TestAssure synchronize over to Boomi. Therefore, it is of utmost importance to avoid configuring FAPs in the Persona with this setting enabled.

- Manager - Common Setup					Various	?
+ Hyperfind					Disallowed	?
+ People Editor					Various	?
Organizational Set Editor	Disallowed	Disallowed	Disallowed	Disallowed		?
+ Jobs and Business Structure					Disallowed	?
Worker Type	Disallowed	Disallowed	Disallowed	Disallowed		?
+ Event Manager					Disallowed	?
+ Table Import					Disallowed	?
Transaction Assistant		Disallowed	Disallowed	Disallowed		?
+ Biometrics					Disallowed	?
+ Schedule Configuration					Disallowed	?
Hyperfind Profiles					Disallowed	?
+ Process Management setup					Disallowed	?
Calendar Views Setup					Disallowed	?
+ Activities Configuration					Disallowed	?
Delegate Profiles					Disallowed	?
Override Alert Event Configuration					Disallowed	?
Role Profiles					Disallowed	?
+ Integrations					Disallowed	?
Workforce Attendance Setup					Disallowed	?
Workforce Leave Setup					Disallowed	?
Dataview Management	Disallowed	Disallowed	Disallowed			?
+ Schedule Group Edit					Disallowed	?
Design Integrations					Disallowed	?

FAPs with Design Integrations set to Allowed must not be used in Personas

To create a Persona based of a real employee in your Test Target click the “AUTO-FILL FROM TEST TARGET” button then simply:

- Enter in the valid Employee ID of the employee you wish to use and the Date from which you wish to pull that employees attributes.
- Hit submit and let TestAssure do the rest.

**Auto-Fill Persona Attributes From Test Target**

Employee ID   
Enter a valid Employee ID that exists in the Test Target

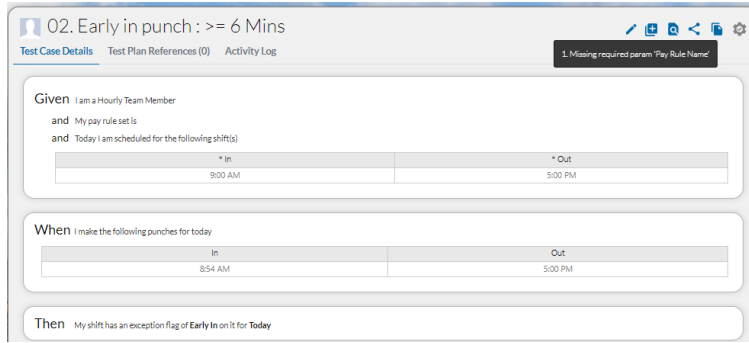
Date   
Enter a date to retrieve the employee profile by

### Understanding what’s required for automated tests.

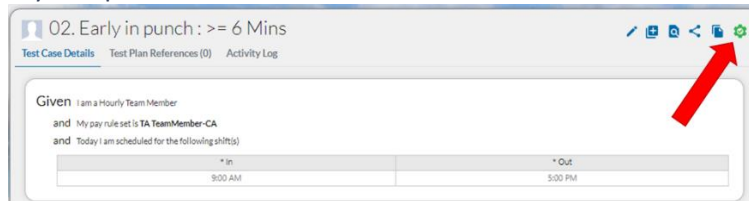
Congratulations you’re now ready to access the Test Cases module and start writing some tests. Before you get to it though just remember for a test case to be able to execute there are two key requirements:

1. Every Test Case must have a Persona with valid attributes
2. All required Parameters within the Test Case must also have values

Here is an example of a Test Case that does NOT have one of the parameters filled out.



Note how the COG / GEAR icon in the top right is grey. Hovering over it will let you know what is still required. Once properly setup it will turn Green.



## UKG Pro

Setting up your UKG Pro connection to TestAssure follows many of the same steps as setting up your UKG Dimensions Test Target, Test Suite & Persona. However, there are some very subtle and important differences.

The primary difference is how we manage data within the Test Target. TestAssure does **NOT** create Employee records within UKG Pro. So while we still require a Persona to be created for each Test Case they are purely descriptive fields.

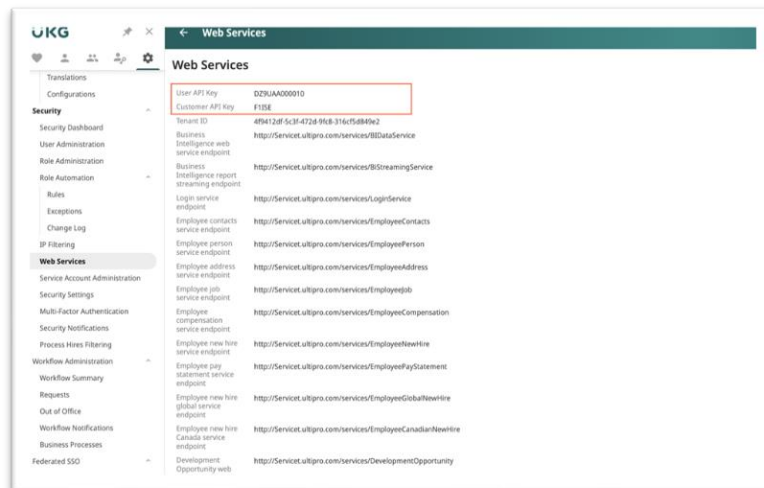
## Setting up a UKG Pro User for TestAssure

### Configuring UKG Pro to Enable Testing Automation

A few things need to be configured within UKG Pro and put into our Test Target (next step) so get a notepad ready to jot down a few values.

#### User API Key & Customer Key

Both of these values can be found in the System Configuration > Security > Web Services tab



Write both of these values down.

#### Service Account Setup

We need to create a new service account for TestAssure to connect to, we do this by accessing System Configuration > Security > Service Account Administration and create a new service and **enable all options**.

**Add/Change Service Account**

User name: TestAssure  
 E-mail: info@testassure.com  
 Generate New Password:

**Note:** Password will be auto-generated upon clicking the Save button.

Web Service	Add	View	Edit	Delete
Employee Person	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee Address	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee Job	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee Compensation	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee Pay Statement	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee New Hire	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee Canadian New Hire	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee Global New Hire	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Development Opportunity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Development Opportunity Session	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Development Opportunity Participation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Employee User Defined Fields	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee Employment Information	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee Phone Information	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Employee Termination	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SUI Tax Rate	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee Process Hire	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Employee Self Service API	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**New Password**

{{cxG3^%{6}7GS

**Note:** You will not be able to see this password again after clicking OK. Copy the password and save it in a secure location. If the password is lost or forgotten a new one will need to be generated.

You should now have the following values available to plug into TestAssure:


1. User API Key
2. Customer API Key
3. Service Account User name & Password

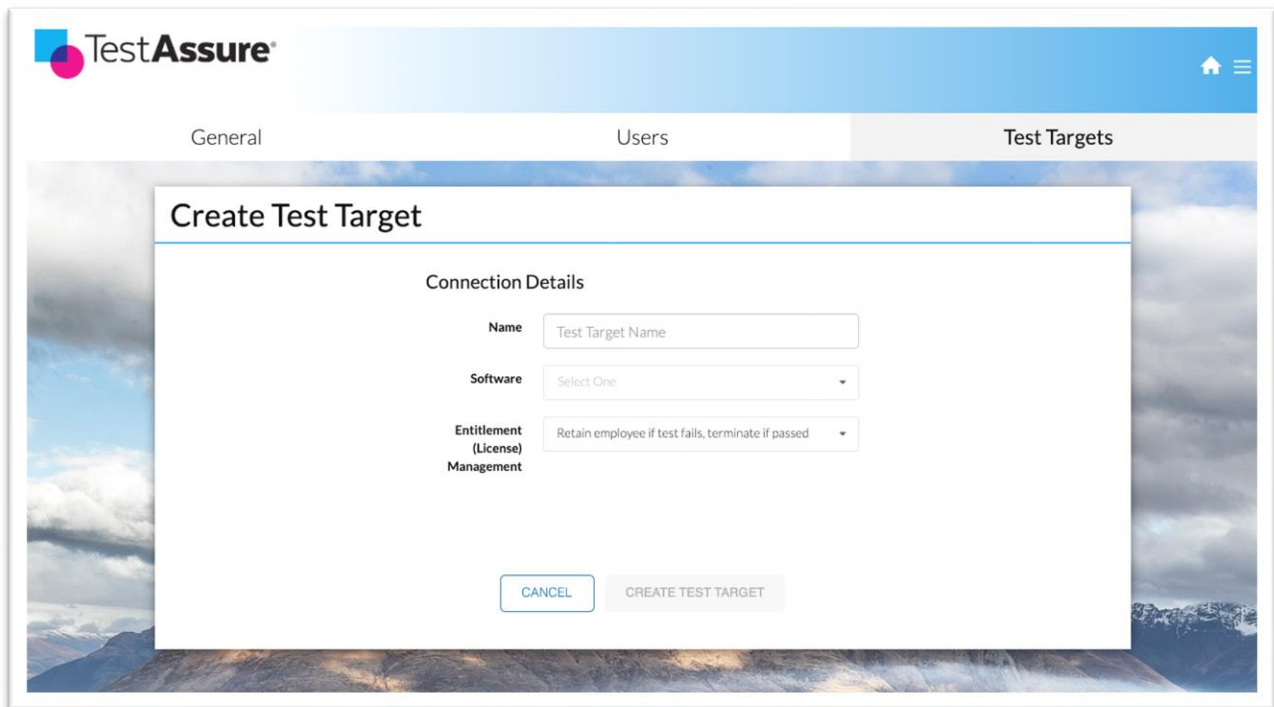
## Setting up a Test Target(s) in TestAssure

In TestAssure, we refer to the UKG Pro environment you wish to run your automated tests against as the “Test Target”. To make sure your data remains secure, both within TestAssure and on your Pro environment, we must configure how TestAssure will communicate with your UKG solution.

Let’s start by access the TEST TARGETS config screen from your TestAssure tenant:



- Using the  (hamburger) icon in the top right of your screen access the SETTINGS
- From here you should now be able to click on the TEST TARGETS tab and click “Create a new Test Target”. You should see something like this:



The screenshot shows the TestAssure interface with the 'Test Targets' tab selected. A modal window titled 'Create Test Target' is open, displaying the following fields:

- Name:** Text input field containing 'Test Target Name'.
- Software:** Dropdown menu with 'Select One' selected.
- Entitlement (License) Management:** Dropdown menu with 'Retain employee if test fails, terminate if passed' selected.

At the bottom of the modal are two buttons: 'CANCEL' and 'CREATE TEST TARGET'.

**NOTE** – if you do not see any of the above options, you have insufficient user access/privileges, please contact [support@testassure.com](mailto:support@testassure.com) or find out who your TestAssure Admin User is within your organization.

- From here please insert a description of the environment such as “UKG Pro Development” and from the Software drop down select “UKG Pro”.
- Proceed to fill in the following details.

### Edit Test Target

Connection Details	Access Credentials
Name: <input type="text" value="UKG Pro"/>	Username: <input type="text" value="TestAssure2"/>
Software: <input type="text" value="UKG Pro"/>	Password: <input type="password" value="....."/> <input type="button" value="VALIDATE TARGET"/>
URL: <input type="text" value="https://servicet.ultipro.com"/>	User Access Key: <input type="text" value="DZ9K3KFL0010"/>
Entitlement (License) Management: <input type="text" value="Retain employee if test fails, terminate if passed"/>	Client Access Key: <input type="text" value="F23G5E"/>
	Web Service URL: <input type="text"/>
	Service Account User Name: <input type="text"/>
	Service Account Password: <input type="password"/>
	Service Account User API Key: <input type="text"/>

### Connection Details

We've already setup the Name and Software so that leaves the following option:

- URL
  - This is simply the URL you use to connect to your PRO environment. Example: <https://bt21.ultipro.com>.


### Access Credentials

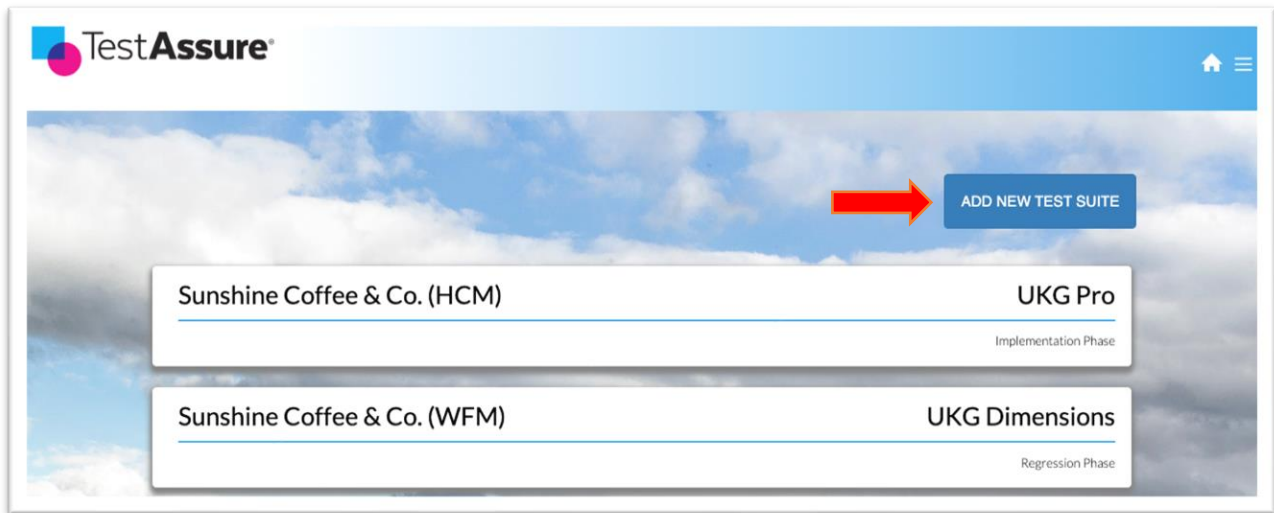
- Username – this is the user you created for TestAssure to connect to your PRO environment.
- Password – this is the password for the Username.
- User API Key – Use the value you recorded from the System Configuration > Security > Web Services page.
- Customer API Key – Use the value you recorded from the System Configuration > Security > Web Services page.
- Web Service URL – This is the first part of the URLs found on the System Configuration > Security > Web Services page. Only include the URL up to the “.com”. For example: <http://servicet.ultipro.com>. Ensure the URL is lowercase.
- Service Account User Name – this is the Service Account Username you created on the System Configuration > Security > Service Account Administration page.
- Service Account Password – this is the Service Account Password that was generated.
- Service Account User API Key – User API Key for the Service Account User. This is found in the user list on the System Configuration > Security > Service Account Administration page.

## Setting up a Test Suite in TestAssure

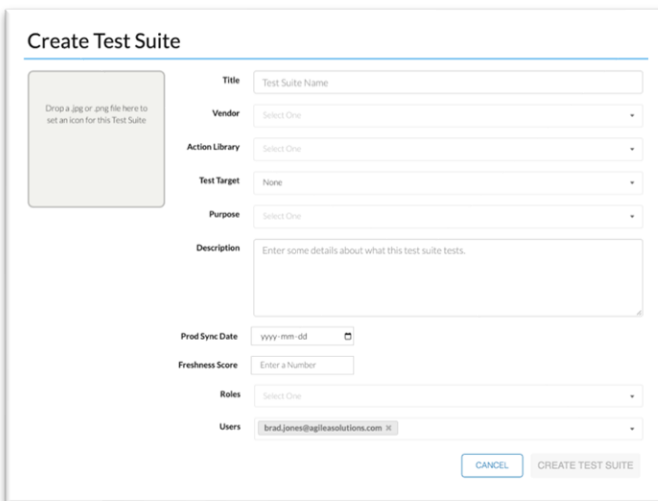
A Test Suite, in TestAssure, refers to a container of Test Cases that can be executed against a specific type of software such as UKG Dimensions or UKG Pro. You may have as many Test Suites as you like, but typically you just have one per software solution you are looking to test against.

Let's create your first Test Suite:

5. Access the HOME screen by clicking the  home icon in the top right (the one to the left of the Hamburger menu)
6. You should now see the TestAssure HOME screen. You may, or may not already have various Test Suites created. The below image shows two Test Suites already created. Click the "ADD NEW TEST SUITE" button.



7. The following screen will allow you to configure your Test Target



- **Title** – Name you wish to call the Test Suite
- **Vendor** – Select UKG
- **Action Library** – Select UKG Pro
- **Test Target** – Select the Test Target from you just created
- **Purpose** – Select Regression (can be changed later)
- Leave "**Prod Sync Date**", "**Freshness Score**" and "**Roles**"
- **Users** - Add any additional Users you want to have access to this Test Suite.

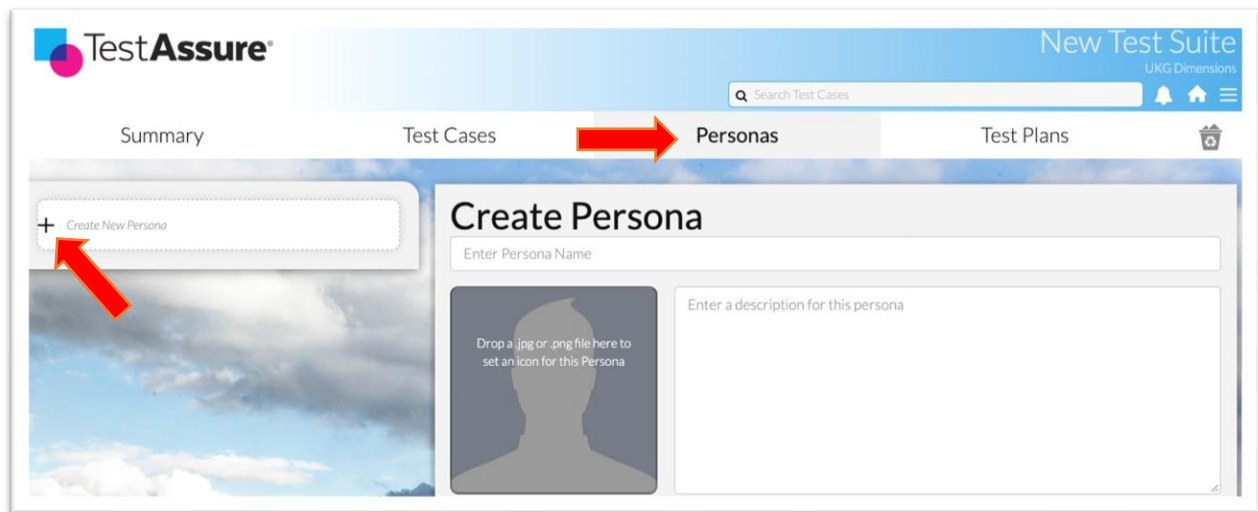
8. Click "Create Test Suite" when all the required fields are filled in & congratulations you're done.

## How Personas are used when testing against UKG Pro

Now that our Test Suite is configured, and connected to our Test Target, we can open up our Test Suite and start writing Tests. There's just one more step we need to configure before that. We need to create a Personas.

Let's setup a Persona now:

3. From the Home screen – click on your newly created Test Suite
4. From here click on the Personas tab on the top navigational ribbon and then the “+” icon beside the Create New Persona on the right. You should see the following screen:



Unlike in UKG Dimensions, when TestAssure runs an automated Test Case against UKG Pro we do **NOT** create new employees based on the Persona. So with that in mind all we need to do is enter a descriptive Persona name and click save.

That's it we're done.