

USER GROUP SESSION SUMMARY

*Mastering Essentials in UKG Ready
HR Core*

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OVERVIEW:

This User Group session focused on document management, checklists, and incident tracking in UKG Ready HR Core. Our presenter, Sability's Deidra Ochoa, provided live demonstrations on how UKG Ready's flexible filters, workflows, and automations can streamline operations and efficiency.

SUMMARY:

Organizations can configure document types with security-based visibility, manage company and employee documents, and efficiently run reports. Checklists, used often in onboarding, offboarding, and internal processes, can be supported with automation via auto-add, diverse task types, and robust tracking, reporting, and notification settings. A recent update allows managers and admins to mark all checklist items as complete or reset them without opening each task, speeding up administration. Incident management can have greater efficiency by defining incident types, setting visibility, applying workflows with approvals and notifications, and tracking resolutions such as disciplinary actions.

KEY HIGHLIGHTS:

- Without using workflows, notifications for checklists, incidents, and documents can be set under Global Setup Notifications.
- Notifications go to the employee's primary email address and appear in the system's My Notifications to-do mailbox (bell icon).
- Checklist completion data can be sent to another system, but requires an integration or API.

PRESENTER



DEIDRA OCHOA

Sability Consultant,
UKG Ready

**WATCH THE
SESSION RECORDING!**

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USER GROUP:

If you're interested in participating in our next User Group session, join our LinkedIn Group "[Sability UKG User Group](#)" or reach us at customersuccess@sability.com