

UKG Pro – Importing Values for a Simple Business Rule with XML.

It's easy to setup a simple business rule in UKG Pro. And if you don't have that many values to enter, it's not a big deal to enter them by hand.

But if you have dozens of possible values, this isn't so easy. Especially if you are working in test and eventually want to move to production without repeating all your work.

You can use the Business Rules Import. Unfortunately, you need to use XML and not CSV format.

The good news is that a few lines of PowerShell can turn any CSV file in to the necessary XML format. We've done this and have placed all the code in GitHub.

I'm using a real-world example. For our client, we needed to map internal Job codes to job codes used for certain NYS reporting. We've set up a business rule for all the NYS titles.

Let's call this "New Business rule".

Business Rules

Role: System Administrator

Actions: [Dropdown] [OK] [Add]

Find by: Name starts with new [Search]

Filtered by: Name - starts with new [Clear Filters]

Name	Description
New Business Rule	New Business Rule

And add a sample code:

New Business Rule

Code	Description
CODE1	Description 1

+ Add - Delete

1 of 1

Displaying 1-1 of 1 records

Now we are ready to upload our data. For your reference, the documentation on this process can be found here on the UKG Ultimate Community Portal --[How to Import into Simple Business Rules](#).

We won't review the details covered in the article. We'll just focus on how our PowerShell script creates the XML from the CSV.

We start with our list of codes in a csv file. You'll note that we have titled the columns rule code and description to make the PowerShell code as self-documenting as possible.

	A	B	C
	RuleCode	Description	
	BHS1	Behavior Intervention Specialist 1	
	BHS2	Behavior Intervention Specialist 2	
	CASMGR	Case Manager	
	DDSPEC	DD Specialist QIDP-Direct Care	
	DIETWK	Dietary Worker	
	HOUSKP	Housekeeping Worker and Maid	
	INTSCR	Intake/Screening	
	JOBCCCH	Job Coach/Employment Specialist	
0	LPN	Licensed Practical Nurse	
1	MAINT	Maintenance/Physical Plant workers	
2	NOTELG	Not Eligible	
3	NP	Nurse Practitioner	
4	NPNS	Nurse Practitioner/Nursing Supervisor	
5	NA	Nursing Assistants	
5	PRSITD	Program or Site Director	

Here's a sample of what that CSV will look like in XML.

```
<Transactions>
  <Transaction>
    <Header>
      <TransactionType>SIMPLERULE</TransactionType>
      <BusinessRule>CO_NEWBUSINESSRULE</BusinessRule>
    </Header>
    <SimpleRule>
      <RuleCode>BHS1</RuleCode>
      <Description>Behavior Intervention Specialist 1</Description>
      <CountryCode>USA</CountryCode>
    </SimpleRule>
  </Transaction>
  <Transaction>
    <Header>
      <TransactionType>SIMPLERULE</TransactionType>
      <BusinessRule>CO_NEWBUSINESSRULE</BusinessRule>
    </Header>
```

```

<SimpleRule>
  <RuleCode>BHS2</RuleCode>
  <Description>Behavior Intervention Specialist 2</Description>
  <CountryCode>USA</CountryCode>
</SimpleRule>
</Transaction>
</Transactions>

```

There are only four fields that can change:

Three are obvious:

RuleCode – An up to Six digit unique code for the value we want.

Description – The description of the code.

Country – For this example, it's always USA.

Business Rule:

In the application, we called the business rule “New Business Rule”.

UKG Pro removes all the spaces and prefixes the remaining name with CO_ to create a table name. So, in our case the business rule is CO_NEWBUSINESSRULE.

If you're unsure about the name, we've included a simple People Analytics Report which will allow us to confirm the name. Indeed, the reason we added that simple code is to allow our report to work before we import values. Here's what the output looks like.

Get & Transform Data

Queries & Connections

Sort & Filter

fx

↶

↷

⌵

A2

✕

✓

fx

CO_INCLUDEDACCROPT

	A	B	C	D
1	Table	Code	Description	
17	CO_NEWBUSINESSRULE	CODE1	Description 1	
76				
77				
78				
79				

The PowerShell:

Here's the sample code.

- 1) To keep this simple, I've hard coded the BusinessRule name. This could be made into a parameter.
- 2) The script expects a csv file called Simple Rule Source.csv to exist in the same directory as the script.
- 3) The script creates an XML file Called Simple Rule for Upload.xml. Note that the script will overwrite any existing file.

Again, you'll find all this in Git Hub.

```
Set-StrictMode -Version 3
```

```
[string]$BusinessRule = "CO_NEWBUSINESSRULE"  
[string]$File          = Join-Path $PSScriptRoot "Simple Rule Source.csv"  
[string]$OutputFile    = Join-Path $PSScriptRoot "Simple Rule For Upload.xml"  
[array]$Records        = @()  
[object]$Record        = $null  
[string]$RuleCode      = ""  
[string]$Description   = ""
```

```
out-file $OutputFile
```

```
add-content -path $OutputFile "<Transactions>"
```

```
$Records = import-csv $File
```

```
foreach($Record in $Records) {  
    $RuleCode = $record.RuleCode  
    $Description = $record.Description  
    add-content -path $outputFile `"  
        <Transaction>  
            <Header>  
                <TransactionType>SIMPLERULE</TransactionType>  
                <BusinessRule>$BusinessRule</BusinessRule>  
            </Header>  
            <SimpleRule>  
                <RuleCode>$RuleCode</RuleCode>  
                <Description>$Description</Description>  
                <CountryCode>USA</CountryCode>  
            </SimpleRule>  
        </Transaction>"  
}  
add-content -path $OutputFile "</Transactions>"
```

Once you have the PowerShell, you'll have your output file which we call Simple rule for Upload.xml.

You can simply use Business Rule Import – File Upload to load this data.

Note that as this is an XML file, no mapping is required.

Simply choose a file name and click upload.

After you click upload, the file name will show as uploaded.

System Configuration

business rules

Business Rules

Business Rules Import

Results

File Upload

File Mapping

Translations

Configurations

Information

File Simple Rule For Upload.xml was uploaded successfully and is queued to be processed.

Available File Mappings

No Selection

Upload a new file: Choose File No file chosen

Upload

Uploaded File History

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

Date	Uploaded File Name	User	Status	Message
3/15/2023 11:43:11 AM	Simple Rule For Upload.xml	adam@redthree.com	Uploaded	

System Configuration

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Date	Uploaded File Name	User	Status	Message
3/15/2023 11:43:11 AM	Simple Rule For Upload.xml	adam@redthree.com	Uploaded	

You can refresh the screen until the status changes to completed.

File Upload

Information

Uploaded files are queued for processing. There will be a delay before the data starts appearing on the Import Results page. Uploading the same file more than once will result in the same data being processed multiple times.

Available File Mappings

No Selection

Upload a new file: Choose File No file chosen

Upload

Uploaded File History

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

Date	Uploaded File Name	User	Status	Message
3/15/2023 11:45:14 AM	Simple Rule For Upload.xml	adam@redthree.com	Completed	

You can then choose results to see whether the individual records passed. Note that you'll have to click search to see you records:

System Configuration

- Content Management
- Platform Configuration
- Page Links
- System Settings
- Business Rules
- Results**
- File Mapping
- Translations
- Configurations
- Security

Import Results

Find by: File name starts with

Filtered by: File name - starts with [Clear Filters](#)

Re-post: No Re-posts

Actions:

<input type="checkbox"/>	File Process Date	Service Submittal Date	Last Repost Date	Repost Info	Status	Business Rule	Code	Messages
<input type="checkbox"/>	3/15/2023 11:45:13 AM	3/15/2023 11:45:17 AM			Passed		UNTSEC	
<input type="checkbox"/>	3/15/2023 11:45:13 AM	3/15/2023 11:45:17 AM			Passed		UNTAST	
<input type="checkbox"/>	3/15/2023 11:45:13 AM	3/15/2023 11:45:17 AM			Passed		THERAP	
<input type="checkbox"/>	3/15/2023 11:45:13 AM	3/15/2023 11:45:17 AM			Passed		SSW	
<input type="checkbox"/>	3/15/2023 11:45:13 AM	3/15/2023 11:45:17 AM			Passed		SUPERV	
<input type="checkbox"/>	3/15/2023 11:45:13 AM	3/15/2023 11:45:16 AM			Passed		LSW	

Displaying 1-10 of 479 records

If you switch back to business rules, you'll see your values:

New Business Rule

Code	Description
BHS1	Behavior Intervention Specialist 1
BHS2	Behavior Intervention Specialist 2
CASMGR	Case Manager
CODE1	Description 1
DDSPEC	DD Specialist QIDP-Direct Care
DIETWK	Dietary Worker
HOUSKP	Housekeeping Worker and Maid
INTSCR	Intake/Screening
JOBCCCH	Job Coach/Employment Specialist
LPN	Licensed Practical Nurse
LSW	Social Worker-Licensed (LMSW, LCSW)
MAINT	Maintenance/Physical Plant workers
NA	Nursing Assistants
NOTELG	Not Eligible
NP	Nurse Practitioner
NPNS	Nurse Practitioner/Nursing Supervisor
PRSIDT	Program or Site Director
PSY	Psychologist (Licensed)
PSYWRK	Psychology Worker/Other Behavioral Worker
RN	Registered Nurse

+ Add Delete

1 of 2 20

Displaying 1-20 of 25 records

Once these values exist, you can then attach them to a Platform configuration field and assign them to the appropriate object. But that's a separate blog post.

Let us know if you have questions in the comments below. Or [contact us](#) if you have data integration and/or analytics questions around UKG.