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Document Purpose

The purpose of this document is to provide you, the end-user, with instructions to successfully create new administrators on the UMB Commercial Card platform. This is commonly done for organizations that require department administrators or site coordinators.

This guide assumes the employee is already a user, if they are not, please see Administrator User Guide for further details on how to setup new users.

Search For An Existing System User

1. Navigate to Administration → Administration Overview → Employees:
2. Search for the by Employee ID, First/Last Name, Username, or Last 4 Digits of Account Number or ask the system to return all results:

![Employee Search Form]

- Employee ID
- Employee First Name
- Employee Last Name
- Username
- Company/Unit: [All]
- Account Number (Last 4 Digits)
- Account Holder With

Return Results: All
- Group by Company Unit
- Selected Unit Only
- Export mode

[Search Button]
Create An Administrator

3. Select the employee you wish to make an Administrator and then select **Manage selected employees** (checkbox next to Employee Name)

4. To **Manage selected employees** under Employee Management select **Rights Group** and add the employee to the CPA Base or CPA Expense Management:

5. Select **Done**
6. Select **Confirm**
Entitle Administrator To Card Management

1. Select **Employee Details** of the Administrator to assign Card Management entitlements to.

2. A popup box will appear allowing you to select the appropriate Card Management functions for your new Administrator. By default, all functions are selected on.

3. **Exit** to Close