

Create New Administrator Quick Reference Guide



Count on more.

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UMB Commercial Card

Create New Administrator – Quick Reference Guide

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Reg. U.S. Pat. & Tm. Off.

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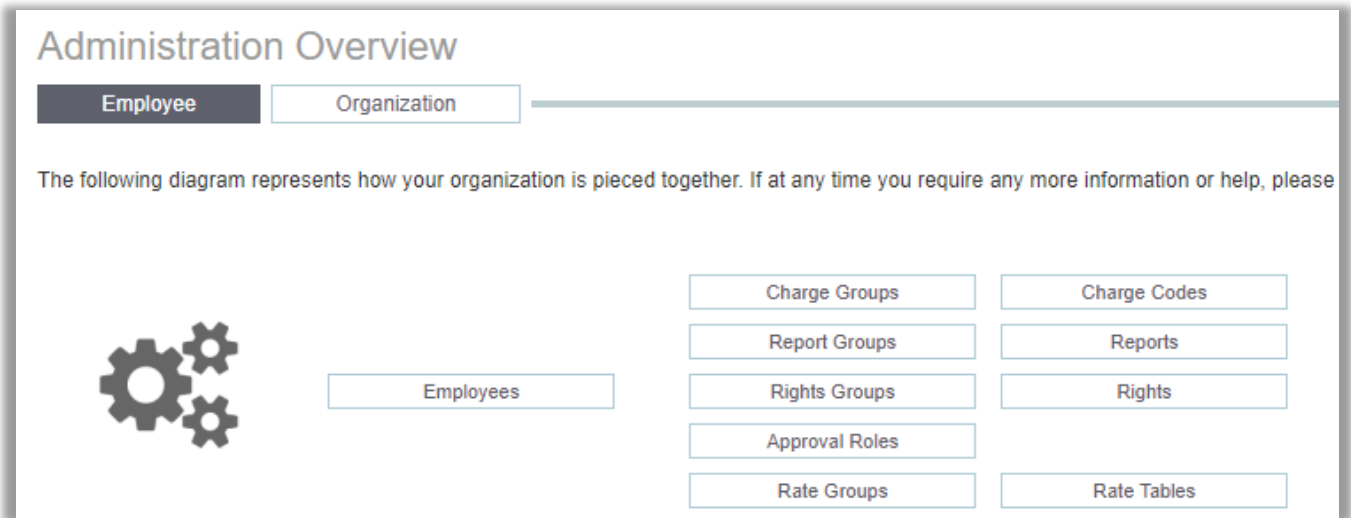
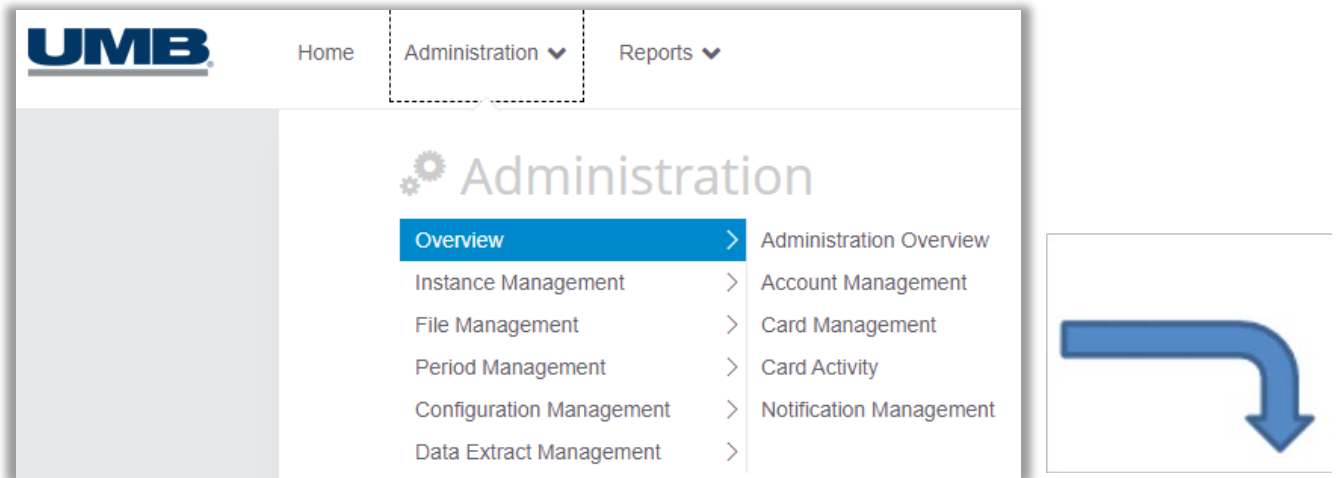
Document Purpose

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

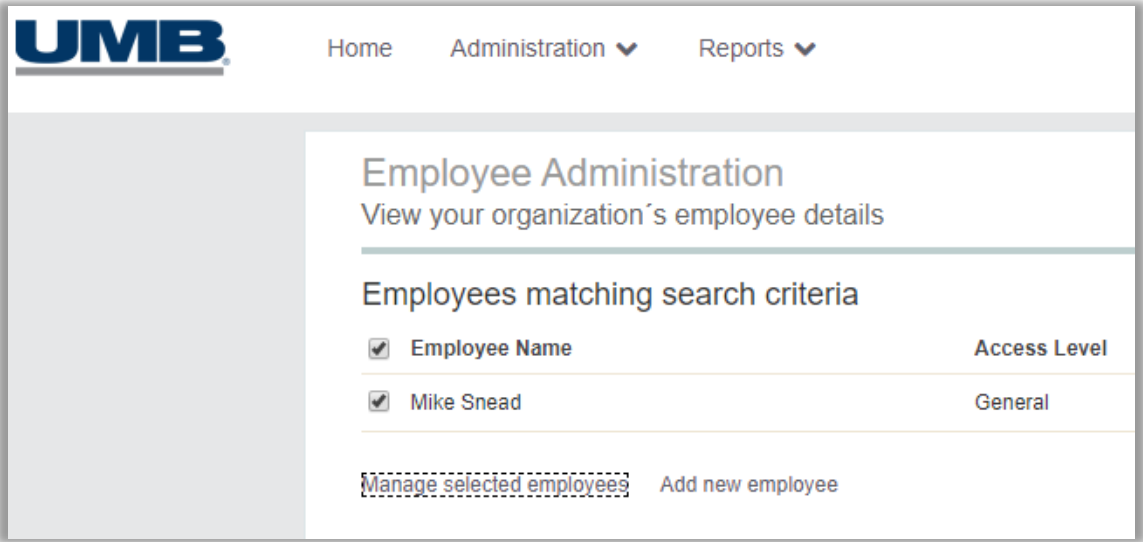
Employee ID	<input type="text"/>
Employee First Name	<input type="text"/>
Employee Last Name	<input type="text"/>
Username	<input type="text"/>
Company Unit	[All] ▼
Account Number (Last 4 Digits)	<input type="text"/>
Account Holder With	<input type="text"/>

Return Results	All ▼
Group by Company Unit	<input type="checkbox"/>
Selected Unit Only	<input type="checkbox"/>
Export mode	<input type="checkbox"/>

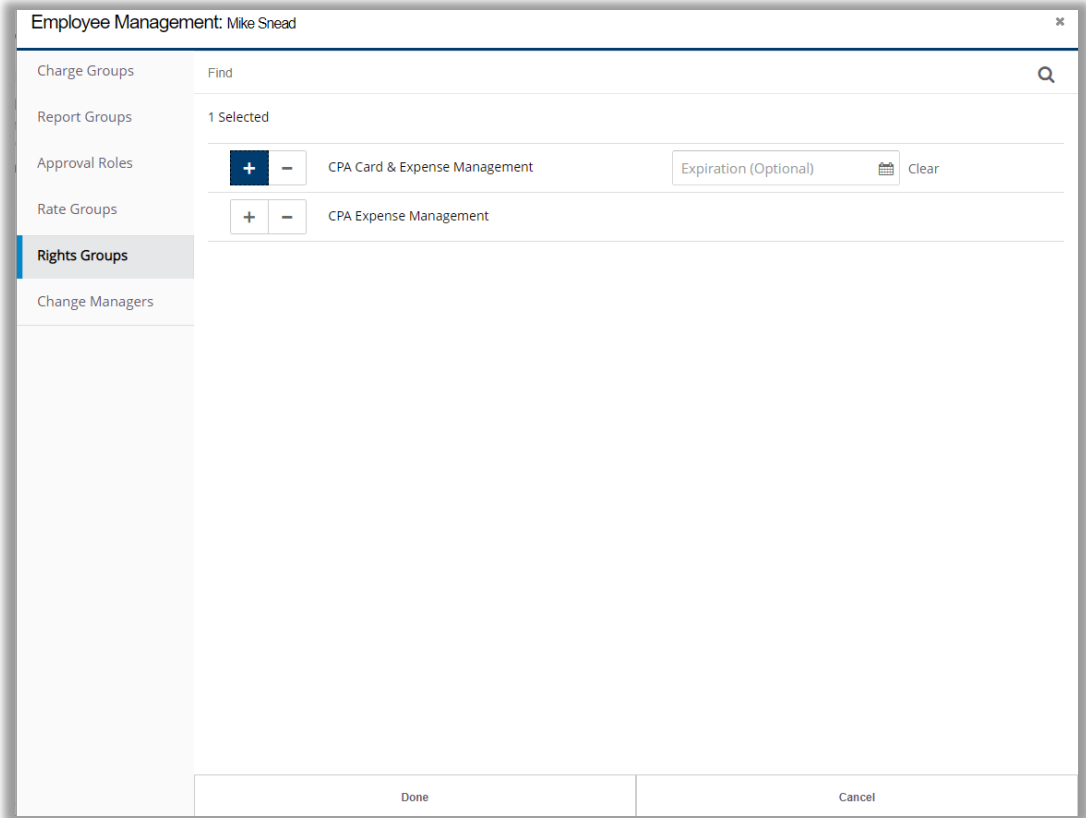
[Search](#)

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:



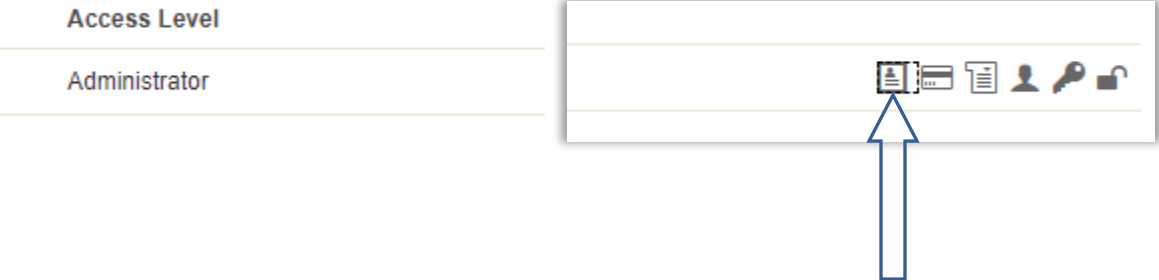
- 5. Select **Done**

6. Select **Confirm**

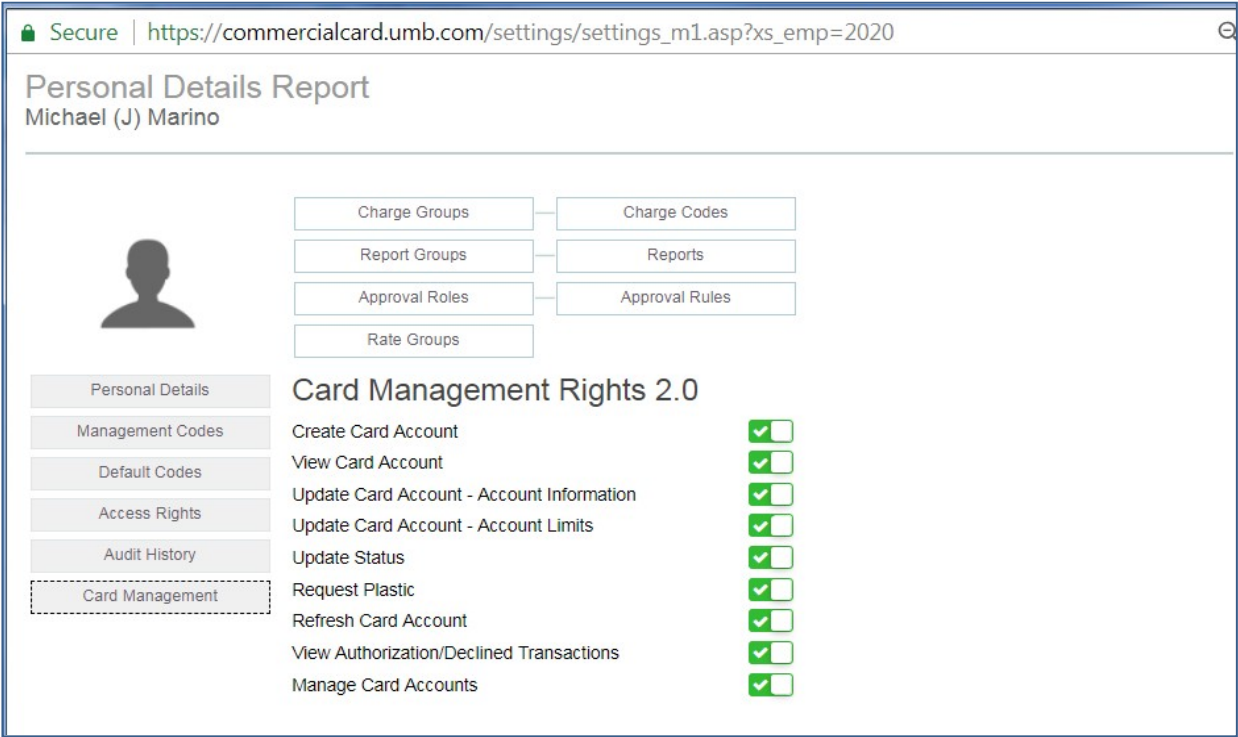
The screenshot shows a web application window titled "Employee Management: Mike Snead" with a close button (x) in the top right corner. On the left is a vertical navigation menu with the following items: "Charge Groups", "Report Groups" (highlighted in blue), "Approval Roles", "Rate Groups", "Rights Groups" (highlighted in grey), and "Change Managers". The main content area is titled "Confirm Changes" and contains a grey bar with the text "Add to the following:". Below this bar, the text "CPA Card & Expense Management" is listed. At the bottom of the window are two buttons: "Confirm" on the left and "Back" on the right.

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