Adding a System Administrator – User Guide

General Information

Adding a system administrator can be a three-tier process. The first step would be to add the administrator account to the system. The second step would be adding the administrator to the Company Groups, granting access to company instances. The third step is adding the administrator to Account Groups, allowing the administrator to view or edit other system administrators.

Important Detail – Read

Please note that the processes and procedures of each UKG partner may vary. These instructions are not customized to fit the specific needs of any one company, and it is essential to use them with the utmost care to ensure accurate and reliable results.

Note that these steps can take up to five minutes for the system to process.

Adding a System Administrator

This section covers how to add a system administrator to the system.

Note: Adding a system administrator does not grant access to view companies or other system administrator accounts. See the following sections to continue through the configuration.

1. Navigate to the main menu as a system administrator > cog icon > Maintenance > Admin Company > Accounts.
2. Click **ADD NEW ACCOUNT** in the upper right area.
3. Enter all applicable information in the **Account Information** section, including:
    a. Username
    b. New Password
    c. First Name
    d. Last Name
4. Enter all applicable information in the **Personal Information** section, including:
    a. Primary Email
5. Update all relevant fields in the **Profiles** section, including:
    a. **Security**: This grants user access to what they can do in the system.

       Note – If your company has built many different security profiles, you may need to consult internally to understand the difference between each profile better.

    b. **Additional Security**: Not always used. However, it's essential to understand the differences if there are available profiles. You may need to consult internally to know how each profile is utilized.
    c. **Roles**: This defines a user's role in the system.
6. Update all applicable files in the **Settings** section, including:
    a. **First Screen**: this is the first screen users will see when they log in each time. This can depend on your company's preference. We often see **All System Companies** used.

> ***Note*** – This can vary between users. For example: if an administrator moves money, this field may be updated to Payroll Processing, or if they process payrolls/live check management, this field may be updated to Payroll Processing.

7. Click **SAVE**.

Company Groups

This section covers how to add an administrator to a company group. A company group will allow administrators to view/edit company instances.

1. Navigate to the main menu > cog icon > Maintenance > Admin Company > Company Groups.
2. Add the administrator to a current group **or** create a new one.
   a. To add an administrator to a current group, click on the pencil icon of the currently available groups.

> ***Note***
> Ensure to review internally to understand the available groups better. **The Group Description** may include more details about the group.

   b. Click on **VIEW GROUP PERMISSIONS** in the upper right-hand area.
   c. Click **ADD MANAGER**.
3. Choose the system administrator by clicking **View List of Employees** icon in the **Manager** field.
4. Check **View** if the system administrator should have viewing access.
5. Check **Login As Account** if the administrator can log in to a user account within a company instance
6. Check **Login As SA** if the user can log in as a system administrator within a company instance.
7. **Security Profile To Use** can restrict a user's ability within a company instance. Update as needed or if applicable.
8. Click **Add**.

Account Groups

This section covers how to add an administrator to an account group. An account group will allow administrators to view or edit other administrator accounts. For example, if an implementation should have access to updating fields in the company information page to show who the implementor is, then this would show how to grant this type of access.

1. Navigate to the main menu > cog icon > Maintenance > Admin Company > Account Groups.
2. Add the administrator to a current group **or** create a new one.
3. To add an administrator to a current group, click on the pencil icon of the currently available groups.

> ***Note***
> Ensure to review internally to understand the available groups better. The **Group Description** may include more details about the group.

4. Click on **VIEW GROUP PERMISSIONS** in the upper right-hand area.
5. Click **ADD MANAGER**.
   a. Choose the system administrator by clicking **View List of Employees** icon in the **Manager** field.
6. Check **Edit** if the account should have system administrator editing privileges. If unchecked, the system administrator will only have viewing access.
7. Click **Add**.