



# UHY Advisors uses UKG Pro Document Manager to Grow HR Shared Services Organization

UHY provides accounting, tax, and business consulting services to clients ranging from middle market to Fortune 500 companies. The firm has 18 offices in 10 U.S. states. UHY has been an UKG customer since 2007, using UKG Pro for HR, benefits, and payroll, and responding to executives' reporting needs through UKG Pro People Analytics.

Employees: 3,000  
Industry: Professional Services

## Top Challenge

UHY used a paper-based filing system, housing files at three regional offices around the country. When employee information was needed at the company's headquarters, a local HR team member would have to scan and convert an employee file into an emailable PDF, or even physically mail the entire folder.

## Solutions

HR team members based anywhere can digitize files and add them to the solution, and easily collaborate on the documents that are inside.

Company has been able to achieve significant savings with Document Manager by eliminating paper and reducing the HR team's manual tasks, all while increasing access to HR documentation which is now secure and accessible 24 hours a day.

## Results

The company was able to dismantle its regional file hubs and move everything to the cloud.

Document Manager makes it much easier for company to share documents with external third parties securely.

**“UKG Pro works alongside Document Manager to advance our vision of a shared-services organization. With Document Manager, HR team members based anywhere can digitize files and add them to the solution, and easily collaborate on the documents that are inside. These two solutions have helped make for a more national, cohesive HR team.”**



## Key Benefits

- **HR team members based anywhere can digitize files, add them to UKG Pro Document Manager, and easily collaborate on the documents that are inside**
- **Company has been able to achieve significant savings by eliminating paper and reducing the HR team's manual tasks**
- **Solution helps UHY meet the unique compliance needs of the accounting industry**

**Jeff Cunningham, Director of Information Systems**

## Challenges

Until 2017, UHY used a paper-based filing system, housing files at three regional offices around the country. When employee information was needed at the company's headquarters, a local HR team member would have to scan and convert an employee file into an emailable PDF, or even physically mail the entire folder. During this time, UHY began its evolution from a smaller, more decentralized firm to a larger, national entity that strived to operate as a shared-services organization.

## Solutions

UHY selected UKG Pro Document Manager, formerly UltiPro Employee File Management, and went live in October 2017.

"UKG Pro [formerly UltiPro] works alongside Document Manager to advance our vision of a shared-services organization," said Jeff Cunningham, director of information systems at UHY. "Activating direct access for employees in Pro gave them the ability to update forms such as their direct deposit and tax withholding. As a result, we lifted part of the burden of data entry and managing paper from local HR team members and began a process of spreading the workload around our entire system. With Document Manager, HR team members based anywhere can digitize files and add them to the solution, and easily collaborate on the documents that are inside. These two solutions have helped make for a more national, cohesive HR team."

## Results

According to Cunningham, UHY has been able to achieve significant savings with Document Manager by eliminating paper and reducing the HR team's manual tasks, all while increasing access to HR documentation which is now secure and accessible 24 hours a day. The company was able to dismantle its regional file hubs and move everything to the cloud. Furthermore, the Document Manager efficiencies that drive its business value are also helping UHY meet the unique compliance needs of the accounting industry.

"Document Manager makes it much easier for us to share documents with external third parties securely," said Cunningham. "In the accounting industry, we must go through a peer-review audit process to ensure that we have the appropriate accounting standards internally and for our clients, which also includes the review of HR records. With Document Manager, we can share the appropriate number of files with external auditors, through minimal time and effort."

Cunningham noted that UHY's ability to wrap HR best practices around Document Manager is due to the solution's simple user experience.

"Document Manager is the easiest HR solution I've launched," said Cunningham. "The UKG [formerly Ultimate Software] launch team needs about a week to configure the environment for a new customer. From there, it's easy to set up and easy to use. Minimal training was required on my part for my team to be successful with the solution. In addition, the customer service around Document Manager is among the best I've ever worked with. I have access to my Customer Success Manager whenever I need him, without having to put in a help ticket and wait for a reply. I'm able to run things by him during our weekly meeting or shoot him an email, and I know I'll get a response quickly. Document Manager is a great solution and we're extremely satisfied with it."