

Creating a Profile and Ordering Cards

From the Home page go to Administration. Click on Employees.

The screenshot shows the Spend Dynamics web application interface. At the top, there is a navigation bar with the BMO logo and the text "Spend Dynamics". Below this is a secondary navigation bar with "Home", "Administration", and "Reports". The main content area is titled "Administration Overview" and has two tabs: "Employee" and "Organization". The "Employee" tab is selected. Below the tabs, there is a diagram showing the organization structure. The "Employees" box in the diagram is circled in red. To the left of the diagram are three gears. To the right of the "Employees" box are several boxes representing different organizational components: Charge Groups, Report Groups, Rights Groups, Approval Roles, and Rate Groups. Each of these boxes is connected to a corresponding box on the right: Charge Groups to Charge Codes, Report Groups to Reports, Rights Groups to Rights, and Rate Groups to Rate Tables. The "Approval Roles" box is not connected to any other box.

File Edit View History Bookmarks Tools Help

Spend Dynamics

Bank of Montreal (CA) https://www.bmospenddynamics.com/main/homepage.asp

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BMO Spend Dynamics®

Home Administration Reports

Administration

Overview

- Administration Overview
- Account Management
- Card Activity
- Email Management

Instance Management

File Management

Period Management

Configuration Management

Data Extract Management

Administration Overview

Employee Organization

The following diagram represents how your organization is pieced together. If at any time you require any more information or help please contact your main administrator or help desk.

Charge Groups Charge Codes

Report Groups Reports

Rights Groups Rights

Approval Roles

Rate Groups Rate Tables

Employees

To order a card you must first have profile to map it to. From the Search page that pops up once you hit employee search for the employee by name. Hit Search.

Employee Search - Mozilla Firefox

Bank of Montreal (CA) https://www.bmospenddynamics.com/admin/admin_u1c.asp

Employee Search

Employee ID

Employee First Name

Employee Last Name

Account Number (Last 4 Digits)

Account Holder With

System Login Rights

Yes Password Expired

No Exclude Account Locked

All

Lock Status

Locked by Date

Manually Locked

Forgotten Password

Return Results

Manager Details

Manager First Name

Manager Last Name

Management Level

Group & Role Memberships

Login Disclaimer Acceptance

Date Ranges

User Rights

Additional Fields & Sort Order

Search

If the profile does not exist you must Insert New Employee. If the employee does exist you proceed to the Account Management section order card.

The screenshot shows a web browser window with the URL <https://www.bmospenddynamics.com/main/homepage.asp>. The page header includes the BMO logo and the text 'Spend Dynamics'. Below the header is a navigation bar with 'Home', 'Administration', and 'Reports'. The left sidebar contains a menu for 'Administration' with sub-items: Overview, Administration Overview, Account Management, Card Activity, Email Management, Instance Management, File Management, Period Management, Configuration Management, and Data Extract Management. The main content area is titled 'Employee Administration' and contains the text 'View Your Organization's Employee Details' and 'Sorry no employees found matching your criteria'. In the top right corner of the main content area, there is a search icon and a 'Back' link. A red circle highlights the 'Insert New Employee' link.

Here you will create the profile to link the card to. Id, last name and your password are required. I would strongly urge you add first name and email address to receive information. Under Group and Role Membership choose Cardholder if you would like them to have minimal rights (they can view and print their statements and ones you delegate to them). Save

Personal Settings - Mozilla Firefox

Bank of Montreal (CA) https://www.bmospendynamics.com/settings/settings_ss_e1.asp?xs_emp=-1

Insert Personal Details

Employee ID *	<input type="text"/>	Group and Role Membership	▼
First Name	<input type="text"/>	Charge Group	<input type="text"/>
Last Name *	<input type="text"/>	Report Group	<input type="text"/>
Middle Name	<input type="text"/>	Approval Role	Administrator Cardholder Manager
Email Address	<input type="text"/>	Manager Details	▲
Email Address 2	<input type="text"/>	Default Coding	▲
Phone Number	<input type="text"/>	Delegation	▲
Company Unit	<input type="text"/>	User Details	▲
Home Country Code	<input type="text"/>		
Date Terminating	<input type="text"/>		

For security reasons before saving you need to enter your current password.

Your Password *

Undo Save

Go to Account Management to order card.

The screenshot shows the BMO Spend Dynamics web application. The browser address bar displays the URL <https://www.bmospenddynamics.com/main/homepage.asp>. The page features a blue header with the BMO logo and the text "Spend Dynamics®". Below the header is a navigation bar with "Home", "Administration", and "Reports" tabs. The "Administration" section is expanded, showing a list of sub-menus: "Overview", "Administration Overview", "Account Management" (circled in red), "Card Activity", "Email Management", "Instance Management", "File Management", "Period Management", "Configuration Management", and "Data Extract Management". The main content area is titled "Employee Administration" and includes the subtitle "View Your Organization's Employee Details". It displays a table of employees with the following data:

Employee Name	Access Level	Last Login
Wallace Holly	Administrator	2016-11-30 14:25:48

Below the table, there are links for "Export to Excel", "Export to PDF", and "Export to HR Format". On the right side, there are "Search" and "Back" buttons, and a "All None" button with a checkmark. At the bottom right, there is a link for "Insert New Employee".

When the Search box pops up hit Search on the bottom and x out of Search box.

Account Search - Mozilla Firefox

Bank of Montreal (CA) | https://www.bmospenddynamics.com/reports/report2_1515c.asp

Account Search

Report mode: Employee Account

Account Number (Last 4 Digits)

Account Issuer

Account Status

Hierarchy Node

First Name

Last Name

Export File Name

Export File Type

Summary - Issuer Unmapped Details

Summary - Hierarchy Node

Account Listing Selected Node Only

Account Details

Account Mapping All accounts
 Mapped accounts only
 Unmapped accounts only

Account Activity All accounts
 Used accounts only
 Unused accounts only

Account Date Ranges

Account Limits

Additional Fields

Report Templates

Click on Create New Card and follow the instructions. If you have questions call Spend Dynamics Client Services: 800.844.6445. If you have a large number to order please contact Client Services.

You can also view card requests here.

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- Data Extract Management

Account Search

All accounts matching your search criteria are listed below

Account Issuer	Unmapped	Open	Closed	Expired	Lost / Stolen
Bank of Montreal - MasterCard	-	11	16	-	23
Total	-	11	16	-	23

[Export to Excel](#) [Export to PDF](#)

Create New Card - MasterCard
View Card Creation Requests