

Granting Access to Spend Dynamics to: General User or Granting Administrator Access

This tutorial will take an **Administrator** through the process of granting access to the Spend Dynamics Website for a General/Cardholder (meaning they can only print statements, view/code their own transactions-and ones delegated/mapped to them) and granting a user Administrator Rights (meaning they can see and do everything: open/close cards, order card, change credit limits...etc)

If you want a User to be able to view/print/code another account without Administrator rights see the tutorial on delegation/mapping (Administrator Overview)

The screenshot shows the BMO Spend Dynamics website. The navigation bar includes 'Home', 'Administration' (circled in red), and 'Reports'. The 'Main Menu' on the left lists 'Administration', 'Card Transactions', 'Reports', 'Image Library', 'Report Outbox', and 'eStatement'. The main content area features a 'Welcome Wallace Holly' message with 'Your last visit: 12/14/2016 10:22:59' and 'Company data last loaded: 12/14/2016'. Below this is a 'BMO Spend Dynamics Administrator Update' section with a detailed security notice and instructions for unblocking access in File Properties and disabling Protected View in Microsoft Excel. The notice mentions a Microsoft security update from July 12, 2016, and provides a link to the bulletin. It also includes a message about card mapping, stating that each card account must be linked to a BMO Spend Dynamics user.

From the Administrator home page, click on Employees

The screenshot shows the BMO Spend Dynamics Administrator interface. The top navigation bar includes the BMO logo, the text "Spend Dynamics", and links for "Home", "Administration", and "Reports". The "Administration" section is active, displaying a sidebar with various management options and a main content area titled "Administration Overview".

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.

The diagram illustrates the organizational structure. On the left, there are three interlocking gears. A line connects these gears to a central box labeled "Employees", which is circled in red. From the "Employees" box, a vertical line extends upwards, branching into five horizontal boxes: "Charge Groups", "Report Groups", "Rights Groups", "Approval Roles", and "Rate Groups". To the right of these boxes are corresponding items: "Charge Codes", "Reports", "Rights", and "Rate Tables".

Administration

- Overview
- Administration Overview
- Account Management
- Card Activity
- Email Management
- Instance Management
- File Management
- Period Management
- Configuration Management
- Data Extract Management

A search box will pop up. You can search an individual or can click Search to view your top 20 cards (you can pull this box down and click All to view All). A User will have to have a profile in the system to manage. To create a profile see the tutorial (Create a Profile)

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

Manager Details

Manager First Name

Manager Last Name

Management Level

Group & Role Memberships

Login Disclaimer Acceptance

Date Ranges

User Rights

Additional Fields & Sort Order

Return Results

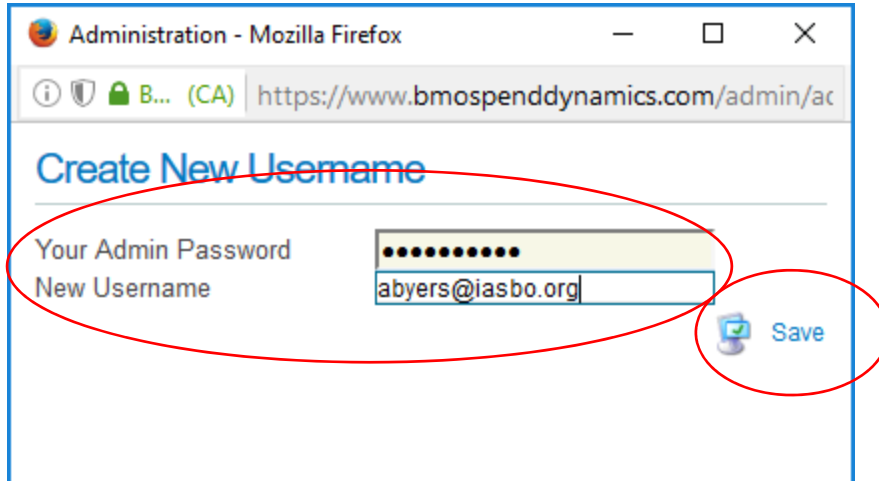
If an individual is grayed out and says No Access under Access Level you will need to Grant them access before they can log in to Spend Dynamics. To grant general/cardholder access click the "N"

The screenshot shows the 'Employee Administration' page in Spend Dynamics. The page title is 'Employee Administration' with the subtitle 'View your organization's employee details'. On the left is a navigation menu with categories like Overview, Instance Management, File Management, Period Management, Configuration Management, and Data Extract Management. The main content area displays a table of employees with columns for Employee Name, Access Level, and Last Login. The 'Access Level' column is circled in red. The first row, for 'Byers Angela', has 'No Access' in the Access Level column and a set of icons in the action column, with the 'N' icon circled in red. At the bottom, there are links for 'Export to Excel' and 'Export to PDF', and an 'All None' button.

Employee Name	Access Level	Last Login	
Byers Angela	No Access	-	
Koca Barbara	No Access	-	
Olson Brett	No Access	-	
Curry Charles	General	2016-12-06 16:18:12	
Taylor Deandra	General	2016-12-14 16:03:13	
Wickens Erin	No Access	-	
Peebles Gwendolyn	No Access	-	
Wallace Holly	Administrator	2016-12-15 10:36:52	
Corbin Jennifer	General	2016-12-14 15:17:14	
Strube Johnathon	No Access	-	
Sharp Judy	No Access	-	
Warner Julie	General	2016-12-07 12:42:32	
Grimes Kirsten	No Access	-	
Jacoby Michael	General	2016-07-06 19:18:57	
Lee Nicole	Administrator	2016-12-15 10:21:21	
Weidner Rebekah	General	2016-12-13 12:55:28	
Salvatierra Stephanie	General	2016-12-15 10:34:26	
Bertrand Susan	Administrator	-	
Curry Tammy	General	2016-12-14 13:02:22	
Hildebrand Zachary	General	2016-12-06 11:49:15	

[Export to Excel](#) [Export to PDF](#) All None

Type in YOUR password and create a User Name (usually their email address-but you can choose whatever is easiest for users to remember). Click Save.



The screenshot shows a Mozilla Firefox browser window titled "Administration - Mozilla Firefox". The address bar displays "https://www.bmospenddynamics.com/admin/ac". The page content includes the heading "Create New Username" and two input fields: "Your Admin Password" (containing masked characters) and "New Username" (containing "abyers@iasbo.org"). A "Save" button with a floppy disk icon is located to the right of the fields. Red circles highlight the password field, the username field, and the "Save" button.

You will need to refresh the page to see the Access has been granted. If there is a red lock-scroll over the lock to see why the account is locked and make changes indicated. Note: the N now is a U.
 To remove access – click on the U (see next page)

Administration

Employee Administration
 View your organization's employee details

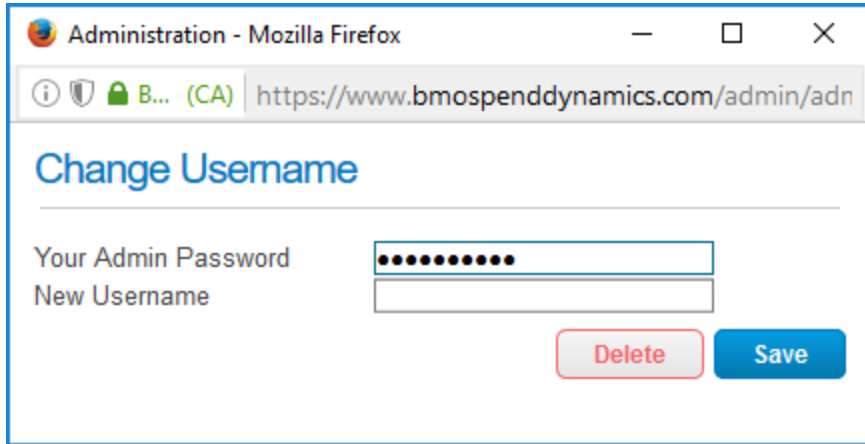
Employees Matching Search Criteria

Employee Name	Access Level	Last Login	Control Icons
Byers Angela	General	-	🔒 + - ↻ U P D
Koca Barbara	No Access	-	🔒 + - ↻ N
Olson Brett	No Access	-	🔒 + - ↻ N
Curry Charles	General	2016-12-06 16:18:12	🔒 + - ↻ U P D
Taylor Deardra	General	2016-12-14 16:03:13	🔒 + - ↻ U P D
Wickens Erin	No Access	-	🔒 + - ↻ N
Peebles Gwendolyn	No Access	-	🔒 + - ↻ N
Wallace Holly	Administrator	2016-12-15 10:36:52	🔒 + - ↻ U P D
Corbin Jennifer	General	2016-12-14 15:17:14	🔒 + - ↻ U P D
Strube Johnathon	No Access	-	🔒 + - ↻ N
Sharp Judy	No Access	-	🔒 + - ↻ N
Warner Julie	General	2016-12-07 12:42:32	🔒 + - ↻ U P D
Grimes Kirsten	No Access	-	🔒 + - ↻ N
Jacoby Michael	General	2016-07-06 19:18:57	🔒 + - ↻ U P D
Lee Nicole	Administrator	2016-12-15 10:21:21	🔒 + - ↻ U P D
Weidner Rebekah	General	2016-12-13 12:55:28	🔒 + - ↻ U P D
Salvatierra Stephanie	General	2016-12-15 10:34:26	🔒 + - ↻ U P D
Bertrand Susan	Administrator	-	🔒 + - ↻ U P D
Curry Tammy	General	2016-12-14 13:02:22	🔒 + - ↻ U P D
Hildebrand Zachary	General	2016-12-06 11:49:15	🔒 + - ↻ U P D

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

All None

To remove access or to change the user name – type in YOUR password and click “delete” to remove access or change user name and click Save.



The screenshot shows a Mozilla Firefox browser window titled "Administration - Mozilla Firefox". The address bar displays "https://www.bmospenddynamics.com/admin/adn". The main content area is titled "Change Username" and contains two input fields: "Your Admin Password" (with a masked password of 10 dots) and "New Username" (which is empty). Below the fields are two buttons: a red "Delete" button and a blue "Save" button.

Before a User can log in you will need to create a Password for them. The first time they log in they will be prompted to change the password and provide answers to security questions.

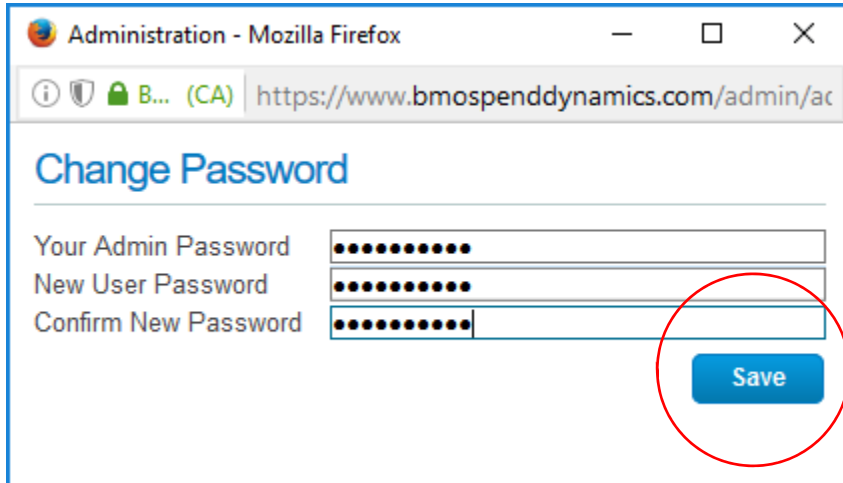
Click on the P

The screenshot shows the BMO Spend Dynamics interface. The top navigation bar includes the BMO logo, the text 'Spend Dynamics', and links for Language, Settings, Help, Contact us, and Log out. The main content area is titled 'Employee Administration' and contains a table of employees. The table has columns for Employee Name, Access Level, and Last Login. The action column for each row contains icons for user management, with 'U' and 'P' icons circled in red for the first row.

Employee Name	Access Level	Last Login	Action
Byers Angela	General	-	U P
Koca Barbara	No Access	-	N
Olson Brett	No Access	-	N
Curry Charles	General	2016-12-06 16:18:12	U P
Taylor Deardra	General	2016-12-14 16:03:13	U P
Wickens Erin	No Access	-	N
Peebles Gwendolyn	No Access	-	N
Wallace Holly	Administrator	2016-12-15 10:36:52	U P
Corbin Jennifer	General	2016-12-14 15:17:14	U P
Strube Johnathon	No Access	-	N
Sharp Judy	No Access	-	N
Warner Julie	General	2016-12-07 12:42:32	U P
Grimes Kirsten	No Access	-	N
Jacoby Michael	General	2016-07-06 19:18:57	U P
Lee Nicole	Administrator	2016-12-15 10:21:21	U P
Weidner Rebekah	General	2016-12-13 12:55:28	U P
Salvatierra Stephanie	General	2016-12-15 10:34:26	U P
Bertrand Susan	Administrator	-	U P
Curry Tammy	General	2016-12-14 13:02:22	U P
Hildebrand Zachary	General	2016-12-06 11:49:15	U P

Enter YOUR password and then create a simple Password (remember it needs upper and lower case letters, a number and a symbol like **Welcome17!**)-the user will be prompted to change it when they log in the first time.

Click Save



Administration - Mozilla Firefox

https://www.bmospenddynamics.com/admin/ac

Change Password

Your Admin Password

























































































































New User Password

Confirm New Password

Save

To change a General User to an Administrator find the User and click on the first symbol-the person details symbol

The screenshot shows the BMO Spend Dynamics Employee Administration interface. The page title is "Employee Administration" and it includes a search bar and a "Back" link. A table lists employees with their names, access levels, and last login times. The first icon in the action column for the first row is circled in red.

Employee Name	Access Level	Last Login	Action
Byers Angela	General	-	     
Koca Barbara	No Access	-	     
Olson Brett	No Access	-	     
Curry Charles	General	2016-12-06 16:18:12	     
Taylor Deandra	General	2016-12-14 16:03:13	     
Wickens Erin	No Access	-	     
Peebles Gwendolyn	No Access	-	     
Wallace Holly	Administrator	2016-12-15 11:12:03	     
Corbin Jennifer	General	2016-12-14 15:17:14	     
Strube Johnathon	No Access	-	     
Sharp Judy	No Access	-	     
Warner Julie	General	2016-12-07 12:42:32	     
Grimes Kirsten	No Access	-	     
Jacoby Michael	General	2016-07-06 19:18:57	     
Lee Nicole	Administrator	2016-12-15 10:21:21	     
Weidner Rebekah	General	2016-12-13 12:55:28	     
Salvatierra Stephanie	General	2016-12-15 10:34:26	     
Bertrand Susan	Administrator	-	     
Curry Tammy	General	2016-12-14 13:02:22	     
Hildebrand Zachary	General	2016-12-06 11:49:15	     

[Export to Excel](#) [Export to PDF](#) All None


Click on Access Rights

Personal Settings - Mozilla Firefox

Bank... (CA) https://www.bmospenddynamics.com/settings/settings_m1.asp?xs_emp=11780

Personal Details Report

Curry (John) Charles



Charge Groups Charge Codes

Report Groups Reports

Approval Roles Approval Rules







- Personal Details
- Management Codes
- Access Rights**
- Email Management
- Multi-Factor Authentication

Curry Charles - Personal Details

Employee ID	11780	Edit ..
Username	jcurry@iasbo.org	Edit ..
Company Unit	-	
Phone Number	-	
Email Address	jcurry@iasbo.org	
Date Added	11/30/2015	
Date Modified	02/12/2016	
Date Terminating	-	

Receipt Upload via Email
ccur.u.5x4sp.vg1g6d@receipt-upload.com [More Info ..](#)

Manager Details

Manager	Lee Nicole	Edit .. 
Manager 2		Edit .. 
Manager 3		Edit .. 
Manager 4		Edit .. 
Manager 5		Edit .. 
Manager 6		Edit .. 

Extended Property Details

No Details [Edit ..](#)

Click on Allocate Administrator Rights this will make the User an Administrator in the system. This will allow this user to open/close/view/print and change card limits. You can customize this setting by checking boxes. **If you just want this user to view and manage certain card-please see the tutorial on delegate and mapping (Administrator Overview)**

Personal Settings - Mozilla Firefox

Bank ... (CA) https://www.bmospenddynamics.com/settings/settings_m1.asp?xs_emp=11780

Personal Details Report

Curry (John) Charles

Charge Groups Charge Codes

Report Groups Reports

Approval Roles Approval Rules

Personal Details Administration

Management Codes **Allocate Administrator Rights**

Access Rights Rights Groups

Email Management Customer Administrator

Multi-Factor Authentication General

General System Rights

- Admin – Access All Schedules
- User Right - Access Own Charge Codes
- User Right - Approval Editing
- User Right - Data Extract
- User Right - Delegate Approval Roles
- User Right - Delegate Cards
- User Right - Editable Reports
- User Right - Enable Report Scheduling
- User Right - Manage Company Expense Templates
- User Right - Manage Company Report Templates
- User Right - Receive Email Trigger Alerts
- User Right - Reports Not Restricted
- User Right - Self Approval Override

Please note you may not have the required access level or rights to view all the rights associated to this employee.