

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 Administrator interface. The top navigation bar includes 'Home', 'Administration' (circled in red), 'Card Transactions', and 'Reports'. The user 'Holly' is logged in. The main content area is titled 'ADMINISTRATOR' and contains the following sections:

- Card Expenses** (17 items)
- Report Outbox**
- eStatement**
- Pinned**
 - Administration
 - Overview
 - Administration Overview
 - Reports
 - Expenditure Analysis
 - Transaction Search - Company
- Corporate Summary**

| III Assoc Of Scht Bus Off(0701057) | | |
|------------------------------------|-----------------------|------------------------|
| Credit Limit (USD) | Current Balance (USD) | Available Credit (USD) |
| 530,000.00 | 55,381.52 | 469,465.00 |
- Account Management**

| | Unmapped | Active |
|-------------------------------|----------|--------|
| Bank of Montreal - MasterCard | 0 | 12 |
- YOUR ACCOUNTS** (Displaying 1 of 1)
 - Purchasing Card** - Bank of Montreal - MasterCard 5550-08xx-xxxx-8178
- Announcements**
 - BMO Spend Dynamics Message**
 - Card mapping guide**: Quick and easy. Check out our new guide to card mapping located [here](#).
 - Important Note**: We will never ask you to provide credit card details, password credentials, or any personal information in an email or over the phone. If you do receive a request like this please report it immediately to your Administrator.

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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, "Spend Dynamics" branding, and links for Language, Settings, Help, Contact us, and Log out. 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" (selected) and "Organization".

On the left, there is a sidebar menu under "Administration" with the following 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 contains a diagram illustrating the organizational structure. It features a central box labeled "Employees" which is circled in red. To the left of this box are three interlocking gears. To the right, a vertical line branches into five categories, each with a corresponding box: "Charge Groups" (linked to "Charge Codes"), "Report Groups" (linked to "Reports"), "Rights Groups" (linked to "Rights"), "Approval Roles", and "Rate Groups" (linked to "Rate Tables").

Below the diagram, a text block reads: "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."

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

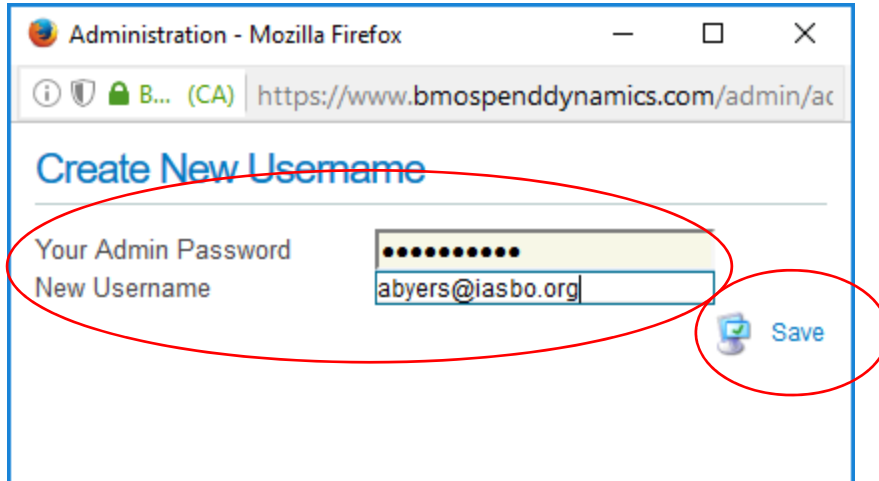
Return Results

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, there is a navigation menu with categories like 'Administration Overview', 'Account Management', 'Card Activity', 'Email Management', '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 a status indicator 'All None' with a checkmark.

| 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 |  |

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.

| | |
|---------------------|------------------|
| Your Admin Password | |
| New Username | abyers@iasbo.org |

Save

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

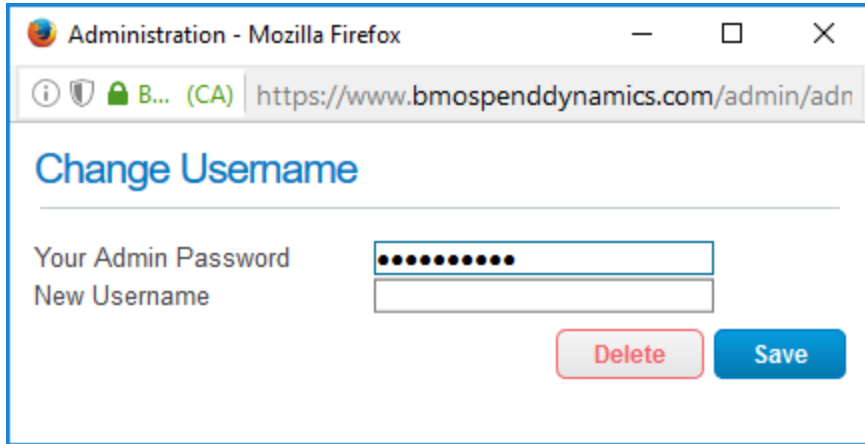
Employees Matching Search Criteria

| Employee Name | Access Level | Last Login | |
|-----------------------|---------------|---------------------|--|
| Byers Angela | General | - | |
| Koca Barbara | No Access | - | |
| Olson Brett | No Access | - | |
| Curry Charles | General | 2016-12-06 16:18:12 | |
| Taylor Deardra | 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

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 page content includes a heading "Change Username" followed by a horizontal line. Below this, there are two input fields: "Your Admin Password" with a masked password of ten dots, and "New Username" with an empty text box. At the bottom right, there 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.

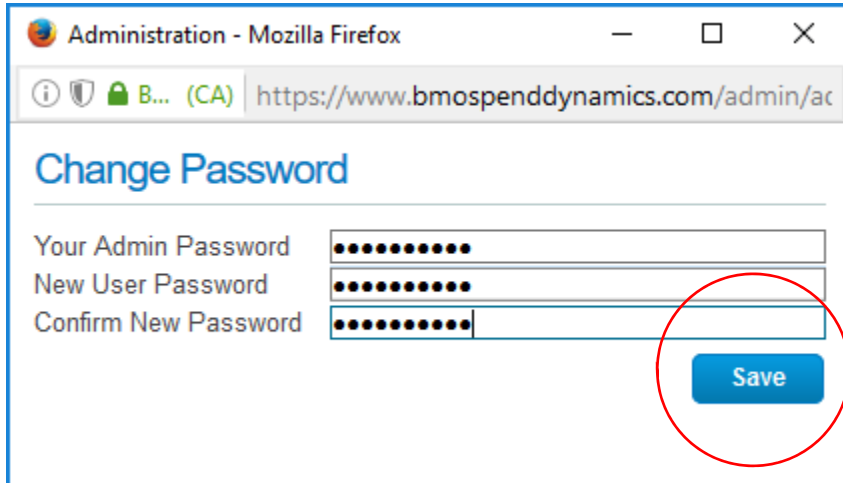
Click on the P

The screenshot shows the BMO Spend Dynamics interface. The top navigation bar includes the BMO logo, the text 'Spend Dynamics', and links for Home, Administration, and Reports. 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 several icons, including a red circle around the 'U P' icons 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



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 "Change Password" and three password input fields: "Your Admin Password", "New User Password", and "Confirm New Password". Each field contains a series of black dots representing masked characters. A blue "Save" button is located at the bottom right of the form, and it is circled with a red line.

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.