

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 displays the BMO Spend Dynamics Administrator interface. The 'Administration' menu item is circled in red. The main content area shows a 'Corporate Summary' table with credit limit, current balance, and available credit. Below that is an 'Account Management' table showing unmapped and active cards for 'Bank of Montreal - MasterCard'. At the bottom, a 'Purchasing Card' is listed for 'Bank of Montreal - MasterCard' with card number 5550-08xx-xxxx-8178.

ADMINISTRATOR		
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		

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.

```
graph LR; Employees((Employees)) --- ChargeGroups[Charge Groups]; Employees --- ReportGroups[Report Groups]; Employees --- RightsGroups[Rights Groups]; Employees --- ApprovalRoles[Approval Roles]; Employees --- RateGroups[Rate Groups]; ChargeGroups --- ChargeCodes[Charge Codes]; ReportGroups --- Reports[Reports]; RightsGroups --- Rights[Rights]; RateGroups --- RateTables[Rate Tables];
```

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 - Mozilla Firefox

Bank of Montreal (CA) https://www.bmospendynamics.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

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 Head Outline with +

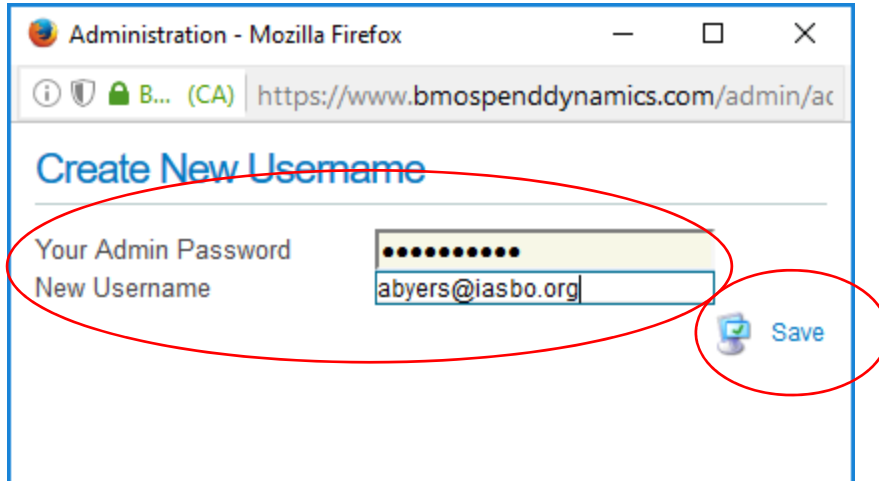
Employee Administration
View your organization's employee details

Employees matching search criteria

<input type="checkbox"/> Employee Name	Access Level	Last Login	
<input type="checkbox"/> Byers Angela	No Access	-	
<input type="checkbox"/> Koca Barbara	No Access	-	
<input type="checkbox"/> Olson Brett	No Access	-	
<input type="checkbox"/> Curry Charles	General	11/06/2018 10:25:57	
<input type="checkbox"/> Taylor Deandra	General	11/13/2018 11:05:16	
<input type="checkbox"/> Peebles Gwendolyn	No Access	-	
<input type="checkbox"/> Du Vall Heather	General	11/12/2018 09:15:29	
<input type="checkbox"/> Wallace Holly	Administrator	11/28/2018 15:00:42	
<input type="checkbox"/> Corbin Jennifer	General	11/08/2018 09:11:47	
<input type="checkbox"/> Warner Julie	General	11/12/2018 15:02:14	
<input type="checkbox"/> Turnroth Laura	General	11/12/2018 12:06:32	
<input type="checkbox"/> Plath Lindsay	General	11/07/2018 10:01:52	
<input type="checkbox"/> Jacoby Michael	General	07/06/2016 19:18:57	
<input type="checkbox"/> Lee Nicole	Administrator	11/13/2018 15:29:23	
<input type="checkbox"/> Weidner Rebekah	General	11/12/2018 11:58:07	
<input type="checkbox"/> Salvatierra Stephanie	No Access	-	
<input type="checkbox"/> Haberkorn Stephen	No Access	-	
<input type="checkbox"/> Bertrand Susan	Administrator	-	
<input type="checkbox"/> Curry Tammy	General	11/09/2018 17:07:42	

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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

If there is a red lock-scroll over the lock to see why the account is locked and make changes indicated. Note: You should see the Key and Lock after the Square symbols

To remove access – click on the Head Symbol (see next pages)

Employee Administration
View your organization's employee details

Employees matching search criteria

<input type="checkbox"/> Employee Name	Access Level	Last Login	
<input type="checkbox"/> Byers Angela	General	-	
<input type="checkbox"/> Koca Barbara	No Access	-	
<input type="checkbox"/> Olson Brett	No Access	-	
<input type="checkbox"/> Curry Charles	General	11/06/2018 10:25:57	
<input type="checkbox"/> Taylor Deandra	General	11/13/2018 11:05:16	
<input type="checkbox"/> Peebles Gwendolyn	No Access	-	
<input type="checkbox"/> Du Vall Heather	General	11/12/2018 09:15:29	
<input type="checkbox"/> Wallace Holly	Administrator	11/28/2018 15:00:42	
<input type="checkbox"/> Corbin Jennifer	General	11/08/2018 09:11:47	
<input type="checkbox"/> Warner Julie	General	11/12/2018 15:02:14	
<input type="checkbox"/> Turnroth Laura	General	11/12/2018 12:06:32	
<input type="checkbox"/> Plath Lindsay	General	11/07/2018 10:01:52	
<input type="checkbox"/> Jacoby Michael	General	07/06/2016 19:18:57	
<input type="checkbox"/> Lee Nicole	Administrator	11/13/2018 15:29:23	
<input type="checkbox"/> Weidner Rebekah	General	11/12/2018 11:58:07	
<input type="checkbox"/> Salvatierra Stephanie	No Access	-	
<input type="checkbox"/> Haberkorn Stephen	No Access	-	
<input type="checkbox"/> Bertrand Susan	Administrator	-	
<input type="checkbox"/> Curry Tammy	General	11/09/2018 17:07:42	

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To remove access or to change the user name – type in YOUR password and click “delete” to remove access or change user name (usually their email address) This is what they will use to log in to Spend Dynamics. Click Save.

The screenshot shows a web browser window titled "Administration - Mozilla Firefox". The address bar displays "https://www.bmospenddynamics.com/admin/adm". The page content includes a heading "Change Username" followed by two input fields: "Your Admin Password" (containing ten black dots) and "New Username" (empty). Below the fields are two buttons: "Delete" (red outline) and "Save" (blue solid).

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.

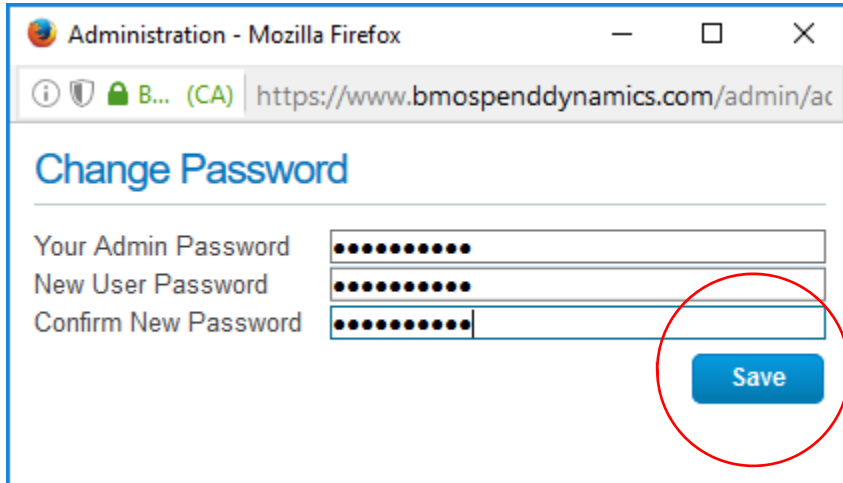
Click on the Key Symbol

The screenshot shows the 'Employee Administration' page in the BMO Spend Dynamics system. The page title is 'Employee Administration' and the subtitle is 'View your organization's employee details'. Below this, there is a section titled 'Employees matching search criteria' which contains a table of employee records. The table has three main columns: 'Employee Name', 'Access Level', and 'Last Login'. To the right of each row is an action column containing several icons: a person icon, a document icon, a key icon, and a lock icon. The key icon for the first employee, Angela Dyers, is circled in red. The footer of the page contains the copyright information: '© 2018 Bank of Montreal. All rights reserved. Privacy policy Legal notice Security'.

Employee Name	Access Level	Last Login	Action
Dyers Angela	General	-	[Person] [Document] [Key] [Lock]
Koca Barbara	No Access	-	[Person] [Document] [Key] [Lock]
Olson Brett	No Access	-	[Person] [Document] [Key] [Lock]
Curry Charles	General	11/06/2018 10:25:57	[Person] [Document] [Key] [Lock]
Taylor Dearthra	General	11/13/2018 11:05:16	[Person] [Document] [Key] [Lock]
Peebles Gwendolyn	No Access	-	[Person] [Document] [Key] [Lock]
Du Vall Heather	General	11/12/2018 09:15:29	[Person] [Document] [Key] [Lock]
Wallace Holly	Administrator	11/28/2018 15:00:42	[Person] [Document] [Key] [Lock]
Corbin Jennifer	General	11/08/2018 09:11:47	[Person] [Document] [Key] [Lock]
Warner Julie	General	11/12/2018 15:02:14	[Person] [Document] [Key] [Lock]

Enter YOUR password and then create a simple Password (remember it needs upper and lower case letters, a number and a symbol like **Welcome19!**)-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: [password field]
- New User Password: [password field]
- Confirm New Password: [password field]

A blue "Save" button is located at the bottom right of the form, circled in red.

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

The screenshot displays the 'Employee Administration' page in the BMO Spend Dynamics system. The page title is 'Employee Administration' and the subtitle is 'View your organization's employee details'. There are 'Search' and 'Back' links in the top right corner. The main content is a table titled 'Employees matching search criteria' with the following columns: Employee Name, Access Level, Last Login, and a set of action icons. The first icon in the action column of the first row is circled in red.

Employee Name	Access Level	Last Login	Actions
Dyers Angela	General	-	   
Koca Barbara	No Access	-	  
Olson Brett	No Access	-	  
Curry Charles	General	11/08/2018 10:25:57	   
Taylor Deardra	General	11/13/2018 11:05:16	   
Peebles Gwendolyn	No Access	-	  
Du Vall Heather	General	11/12/2018 09:15:29	   
Wallace Holly	Administrator	11/28/2018 15:00:42	   
Corbin Jennifer	General	11/08/2018 09:11:47	   
Warner Julie	General	11/12/2018 15:02:14	   

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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.