GETTING STARTED

Signing In the First Time

Cardholders will receive two emails from BMO. Once a user logs in for the first time or their password has expired, the system will prompt the user to accept the Terms & Conditions and to change the temporary password to a permanent one.

Permanent Password requirements:
- 8 to 20 characters long
- Must have lower and upper case letters
- At least one numeric character
- At least one special character

The system will request the user to create three security questions.

Once you change your temporary password, you will return to the login screen and be prompted to set up Two-Factor Authentication (2FA)

Note: If you forget your password, please use the link "**Forgotten your password?**" to reset it.

Three unsuccessful attempts will lock the user out of the system. Contact Purchasing to unlock account. **Note:** Users can wait two hours to have the system automatically unlock it.

Two-Factor Authentication

BMO uses Two-Factor Authentication when signing in. Upon first signing in, users will receive the following prompt where they can select how they receive the authentication code.

1. Mobile App (install app on phone); or
2. Email (click "Use other authentication methods" link)

After creating the password, users will see the following pop-up box.

If you use the same computer to access your account, consider clicking "Remember me" so you will not have to wait for an authentication code for 90 days. If you do get the prompt within the 90-day window, you most likely input your password incorrectly.

Things to Remember When Logging In

- ✓ Do **NOT** cut and paste or autosave your password or authentication code. Type both pieces of information each time.

- ✓ If you fail to put your password in correctly, **after 3 attempts, you will be locked out for 2 hours.** After 2 hours, you can try again. If you are not sure of the password, use the link "**Forgotten your password**?" to reset it.

- ✓ If you have not logged in for 90 days, you will be locked out. In order to gain access again, you will need to contact Purchasing for assistance.

- ✓ Contact Purchasing if you have any questions with logging in.

Home Page

On the Home Page, the **Main Menu** is located at the top of the page. Based upon the user's role, menu options may vary.

- **Main Menu** on the top
- **General Navigation** menu – top right corner
- **Card Accounts** associated to their profile
- **Announcements** section – right side
- **My Actions** section – top
- **Pinned** section are when favorites are pinned – left side

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Viewing Transactions

If you have a red box with a number in it or a red dot next to **Card Transactions** on the **Main Menu**, there are transactions that require coding (assigning ASNs)

Step 1: Click on the red box on the side with a number in it

Step 2: To code single transactions, click on the vendor's name or right blue arrow to open it. This will take you to the Transaction Details.

Note: If you are a delegate for another card, you can access their card by clicking the drop-down arrow in the "Show" field under Expenses.

Coding Transactions

The Transaction Details page is where you will code or assign the ASNs to each transaction. Multiple ASNs can be listed for one transaction.

Step 3: Key in the appropriate ASN to charge the transaction. Click the plus sign to add more than one ASN, if needed.

Step 4: Provide an expense description – reason for purchase – in the Expense Description field. **THIS is required**.

Step 5: Click the COMPLETE button

**Note:** Once all transactions are coded, you will see this message -

Well done!

There are no expenses that need your attention. You may want to check if you have expenses in your delegation list.

Retrieving & Printing Reports

On the **Home Page**, under **Your Accounts**, click on the **statement period** link (not eStatement). This will open your Card Transactions report for that period with the option to view and print your statement report.

Note: Verify all transactions listed have ✓ next to them before printing. If there is an ✗, code the transaction before printing.

Click **View Statement Report** to view and print the report. Click 🖨 for the printer-friendly version.

Cardholders sign the report on the left side.

Cardholders' supervisors sign on the right side.

Send report and all original receipts/supporting documentation to the Business Office.