Barclaycard Spend Management

Your first login
Once your company administrator has set up Barclaycard
Spend Management, you will receive two automated emails
generated by the system, the first with your username and
the second with your temporary password.

Forgot your login details? Simply click the link on the login page for help on resetting passwords, or
contact your system administrator.

**Step 1**
Follow the link in the email or visit Barclaycard.co.uk/spendmanagement

**Step 2**
Enter your username (your Napier email) and password as supplied in the emails and click.
Step 3
Set a memorable word by answering a security question from the list provided and click

Step 4
You’ll be asked to read and accept the terms of use to gain access to the system. Once accepted, your password can be changed to something more personal to you for the next time you log in.

For future logins you’ll need your username, password and your memorable word, from which you’ll be asked to enter three random characters to access the system.

If you are only an approver your home page will look like this – those who are card holders as well will have more on there page.

An Approver’s Barclaycard Spend Management home page will include a link to Approvals which will flash to notify you if there are transactions you need to action.
When you click Approvals from your home page main menu, you will be taken to your Items Requiring Attention Screen. This displays a list of employees who have transactions awaiting your approval, as well as the account type, statement period and number of transactions.

Any statement periods where approval action is required will appear red. If you click the employee name, you will be taken to the Transaction Approval screen, which will display all transactions needing approval across all periods and account types.

A number of transaction and approval icons can be seen on the Transaction Approval screen below. When viewing the transactions of an employee that require your action, you will see two sets of icons to the right of the transaction detail.

One relates to the status of a transaction (action of the employee)

The other relates to the approval status (action of the approver)

- Indicates that mandatory coding or information is still required for the transaction.
- Indicates all required information has been entered for the transaction
- Indicates approval is required for the transaction.
- Indicates approval has been given
To view more information on a transaction, click the transaction status icon to the right of the transaction you want to view, from the Transaction Approval screen.

**Transaction: Details**

**Purchase 17/04/2013**  
**Amount £200.00 GBP**  
**Rapier University, Edinburgh**

<table>
<thead>
<tr>
<th>Line</th>
<th>Account Code</th>
<th>Folder</th>
<th>Country Code</th>
<th>Trip Number</th>
<th>Site</th>
<th>Alogh</th>
<th>Vat Code</th>
<th>Amount</th>
<th>Ind</th>
<th>Tax</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line 1</td>
<td>3401</td>
<td>Stationery &amp; Consumables</td>
<td>E17BB-00</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>P4</td>
<td>166.67</td>
<td>0.00</td>
<td>Exempt</td>
</tr>
<tr>
<td>Line 2</td>
<td>3401</td>
<td>Stationery &amp; Consumables</td>
<td>DB41C-00</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>P4</td>
<td>166.67</td>
<td>0.00</td>
<td>Exempt</td>
</tr>
<tr>
<td>Line 3</td>
<td>3401</td>
<td>Stationery &amp; Consumables</td>
<td>DB41-00</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>P4</td>
<td>166.66</td>
<td>0.00</td>
<td>Exempt</td>
</tr>
</tbody>
</table>

**Narrative Details**

**Purchase: Rapier University**

**Narrative 2**

Testing of BSM test for L drivers

Narrative 2 is the description for the whole transaction – you will see all the folder codes but your approval will only be for your folder.

Click on Summary for more info

Depending on the Transaction what will appear here – different for certain Barclay Card Groups _travel etc.

**Transaction: Details**

**Purchase 03/04/2013**  
**Amount £264.72 GBP**  
**Office Depot, Andover**

- **Transaction Details**
- **View Audit History**
- **Extended Transaction Details**

**Close**

Vers. 25/06/2013
Also by clicking on Transaction line Item

By expanding

To Approve the transaction click Approval Tab
To Approve Click on  which will change to  then on Save

You can also select items to approve –

NB – you are liable to ensure the transactions are correct be for using this option

Tick each line then Approve Selected Items
If you want more information about a transaction click on !

**Transaction: Details**

Purchase 09/04/2013
Amount £147.43 GBP
Amazon Eu, Amazon.Co.uk

Input your comments and then click on Information Required and Save
The Icon against the transaction will have changed to 📚.

On your front sheet you will see a summary of what is waiting – as Information Required – once the transaction has been updated by the card holder.

Click in to the Transaction and then the 📚 to see the comments from the Cardholder.
Folder Approval

Cardholder Comments
Now updated

Approver Comments
Please re-code to E1788-75

Information Required
Approval Required
Approved
Emails

You will receive an email if you have any outstanding transactions to be approved – also with comments from cardholders if info has been requested by you.