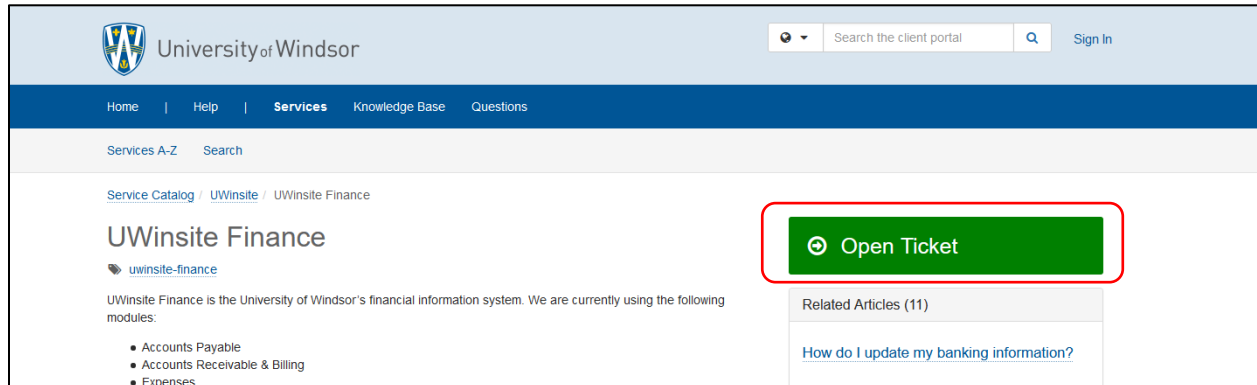


User Guide: How to Complete a BTA Card Application Using The Team Dynamix

Updated: March 14, 2024

1. To open a UWinsite Finance ticket to apply for a BTA Card, please go to:
<https://uwindsor.teamdynamix.com/TDClient/1975/Portal/Requests/ServiceDet?ID=32684>
2. Select the **Open Ticket** box on the right-hand side of the screen.



3. You will be taken to the UWinsite Finance ticket screen. Below are instructions specifically for placing a **BTA Card Application** ticket.
4. **Requestor:** The requestor field should already be populated with your name. However, if you are submitting the ticket on someone's behalf, please replace your name with this individual's name.

UWin ID: Please fill in your UWin ID, or the UWin ID of the individual you are requesting the ticket for.

Acct/Dept: This field should already be populated with your department name. If you are submitting this ticket on someone's behalf, please enter department name for the individual you are submitting on behalf of.

Impact: This field will be defaulted to include **affects person**. For the purpose of the BTA Card Application, please leave it set to this.

Requestor * ⓘ

The name of the person asking for service detailed within the ticket. If you are submitting this ticket on someone's behalf, please replace your name with this person's name.

Rachel McRae (Staff)

UWin ID * ⓘ

please provide UWINID

wamockr

Acct/Dept * ⓘ

The department name of the person requesting support. If you are submitting this ticket on someone's behalf, please enter this person's department name.

Financial Accounting and Reporting

Impact * ⓘ

The impact, in terms of number of individuals, of a ticket.

Affects Person

Urgency: Please select the urgency for importance of the request. If the BTA Card Application is considered urgent and must be added within the next 24 hours, please select **high**. If the request is not urgent, please select **medium**.

Request Type: Please select **BTA Card/ Travel Card / P Card New Card Request** from the drop-down menu. Once selected you will notice that the fields below will change to reflect the **BTA Card/ Travel Card / P Card New Card Request**.

Title: This field is currently populated with UWinsite Finance Support Request. You can leave this field as is.

Card Type: Please select the appropriate card type for the Application you are submitting. There are three options:

- BTA Card
- P Card
- Travel Card

For this example, we will select **BTA Card**.

Urgency * ⓘ

The importance of a ticket and how quickly it needs attention.

Medium

Request Type * ⓘ

What is the nature of your request?

BTA Card/Travel Card/PCard New Card Request

Title * ⓘ

A short description to explain the nature of a ticket.

UWinsite Finance Support Request

Card Type ⓘ

Is this request concerning a BTA Card, a P Card or a Travel Card?

BTA Card P Card Travel Card

Department Name: Please Enter the full name of the department, as it should appear on the credit card. Please note that the Department's name cannot exceed 21 characters.

Phone Extension: Please provide your University of Windsor phone extension for the individual who will be responsible for administering the BTA Card.

Significant Date: For security purposes, each card must have a significant date. This will be used by Scotiabank to verify the cardholder's identity should you ever contact them about this BTA card. The Significant Date must be a valid DATE (8 - digits) and the format must be MMDDYEAR (e.g. 12011941).

Department Name ⓘ
21 character limit on full name

Phone Extension ⓘ
Contact Individuals' Business Phone Number: (519) 253-3000 ext. _____

Significant Date ⓘ
You must assign your own significant date. It is required by the Bank for security reasons. It must be a valid DATE (8 digits) and format must be MMDDYEAR (e.g. 12011941).

Quiz Completed

All Cardholders must complete the online Card Training and Quiz before you can pick up your Card from the Procurement Office. Please visit the following websites to complete the training and the quiz:

BTA: https://met.uwindsor.ca/quizzes/purchasing_bta/

P Card: https://met.uwindsor.ca/quizzes/purchasing_card/

Travel Card: https://met.uwindsor.ca/quizzes/purchasing_travel/

Once the training has been completed, please check the box stating the Quiz has been completed.

Dollar Limit - BTA: The cardholder should understand that the below restrictions are placed on each card. Once reviewed please check the "I Understand" box.

- Monthly Spending Limit: \$ 15,000
- Merchant Category Code (MCC) exclusions for this Purchasing Card will be set up as per University defaults - refer to Cardholder Information Package

Quiz Completed ?

Complete the Card Training/Quiz before you can pick up your card. Go to:

BTA: https://met.uwindsor.ca/quizzes/purchasing_bta/

P Card: https://met.uwindsor.ca/quizzes/purchasing_card/

Travel Card: https://met.uwindsor.ca/quizzes/purchasing_travel/

Quiz Completed

Dollar Limit - BTA ?

Monthly Spending Limit: \$ 15,000

Merchant Category Code (MCC) exclusions for this Purchasing Card will be set up as per University defaults - refer to Cardholder Information Package

I Understand

Fund /Department Account/Program/Project/Classification Account #: Please list which account numbers should be linked to your BTA card. These will be used for transaction/expense allocation within the Scotia CentreSuite Card Management System. You must have signing authority on these accounts.

Fund # ?

Please list which account numbers should be linked to your purchasing card. These will be used for transaction/expense allocation within the Scotia CentreSuite Card Management System. You must have signing authority on these accounts:

01

Department Account #

2710

Program Account #

27100

Project Account # ?

Project or Grant Account #

000000

Classification Account #

000

BTA Card Explanation: Due to the specific spending requirement on the BTA Card and the restricted purchase capability, please provide an explanation as to why the department will require a BTA Card.

BTA Card Explanation ?

Explanation as to why the department will require a BTA Card:

I will require this BTA Card to pay for travel expenditures for a third party group of Accountants attending a conference within the Finance Department.

Request Approval: By checking this box, you as the cardholder, confirm that all information included in this ticket is correct and you confirm that you have reviewed this request with the appropriate one-up signing authority on the account being charged, and they have approved this request.

You also confirm that you have attached email confirmation, from the appropriate one-up signing authority with their approval.

Effective Date: Please choose the effective date of change.

Request Approval ⓘ

By checking this box I confirm that all information included in this ticket is correct and I confirm that I have reviewed the this request with the appropriate one-up signing authority on the account being charged, and they have approved this request.

By checking this box I confirm that I have attached email confirmation, from the appropriate one-up signing authority with their approval.

I Confirm

Effective Date ⓘ

Please choose the effective date of change.

Additional Comments: In the field provided, please provide any additional comments or details, including any appropriate circumstances or supplementary information that may aid in processing this application.

Attachments: Please provide any attachments that you think may be necessary to assist the Procurement department in fulfilling your request.

Additional Comments ⓘ

Additional details, including any appropriate circumstances or supplementary information that may aid in resolving this issue or fulfilling your request.

Format - Font - Size - A- B I U S x^o x^o | T_x

☰ ☲ ☳ ☴ ☵ ☶ ☷ ☸ ☹ ☺ ☻ ☼ ☽ ☿

Attachment ⓘ

Please attach any files relevant to this ticket, if necessary (To attach multiple files, hold down the CTRL key and click on all files you want to upload.)

No file chosen

Once you have completed and reviewed the form, select **Submit**, to submit the form for processing.

Once the form is submitted you will receive the below confirmation to let you know that your request has been submitted successfully. You should also receive an email confirmation for the ticket you submitted as well.

The screenshot shows the University of Windsor Services portal. At the top left is the University of Windsor logo and name. To the right is a search bar. Below the header is a navigation menu with links: Home, Help, Projects/Workspaces, Services, Knowledge Base, Questions, and Reports. Underneath this is a secondary navigation bar with links: Ticket Requests, My Favorites, My Recent, My Approvals, Services A-Z, and Search. The main content area displays a green checkmark icon followed by the text "Request Created Successfully!". Below this, a small box shows "Service Request ID: 16110628". The text "What do you want to do now?" is followed by three blue hyperlinks: "Create another request of this type", "View the request you just created", and "View your ticket requests".

The ticket is submitted to the **Corporate Card and Supplier Assistant** for review, and then must be approved by the **Procurement Manager**. We will work to process the request as soon as possible, and all tickets will be processed in a first come first serve order. We ask that you please allow a minimum of 2 business days processing time for each supplier request.

Note: Please ensure to monitor your e-mail box for updates on submitted ticket. Procurement will update the ticket once the request has been approved and processed. Procurement may also reach out to you through the ticket, should they require any additional information to process the application form.