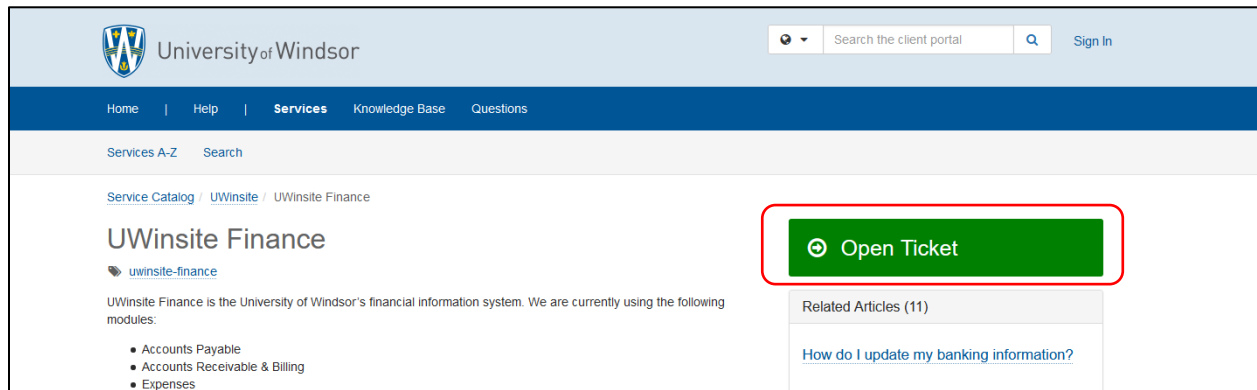


**User Guide: How to Complete a Purchasing, BTA or Travel Card Change Request Team
Dynamix Ticket
Updated: March 14, 2024**

Section 1: Purchasing Card (P Card) Change Request Form:

1. To open a UWinsite Finance ticket to submit a change request for a PCard, 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 **P Card Change Request** 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 Change Request Form, 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 Change Request 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 Change 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 Change Request**.

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

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

- BTA Card
- P Card
- Travel Card

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

Please see **“Section 2: BTA Card Change Request Form”** for instructions on how to complete a BTA Card Change Request Form.

Please see **“Section 3: Travel Card Change Request Form”** for instructions on how to complete a Travel Card Change Request Form.

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 Change 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 Travel Card, or a P Card?

BTA Card P Card Travel Card

Card Digits: Please enter only the **last 4 digits** of the card you are requesting the change for.

Date of Request: Please enter the current date.

Card Digits ⓘ
Enter the last four digits of the card:

1234

Date of Request

12/2/2020

P Card Single Transaction Change: The current Single Purchase Transaction Limit is set at **\$5,650** for all Purchasing Cards. If you would like to request a change to this limit, please complete this field. In the blank field enter the dollar value of the requested change to the Single Purchase Transaction Limit. (For example, if you would like to increase the Single Purchase Transaction Limit to \$6,000 please enter "6000" in this field) Do not include "," or "\$" in this field.

P Card Monthly Limit Change Request: The current Monthly Card Transaction Limit is set at **\$10,000** for all Purchasing Cards. If you would like to request a change to this limit, please complete this field. In the blank field enter the dollar value of the requested change to the Monthly Card Transaction Limit. (For example, if you would like to increase the Monthly Card Transaction Limit to \$20,000 please enter "20000" in this field). Do not include "," or "\$" in this field.

Limit Change Explanation: In this field provide a detailed explanation for why you are requesting the increase to either the Single Transaction Limit or Monthly Card Limit.

P Card Single Transaction Change ⓘ

Current Single Transaction Limit: \$2825
Enter the Requested Single Transaction Limit, if different:

0

P Card Monthly Limit Change Request ⓘ

Currently Monthly Transaction Limit: \$10,000
Enter the Requested Monthly Limit, if different:

20000

Limit Change Explanation ⓘ

Explanation for the Increase:

I have a significant number of purchases to place on my Purchasing Card this month and therefore I will require the Monthly Card Transaction Limit increase to \$20,000 to allow all the transaction to be processed.

MCC Groups Lift Restriction: In this field, select from the drop-down menu, what type of MCC Group Restriction you would like lifted from your card. The options are as follows:

- Auto
- Gas
- Hotel
- Meals
- Rent
- Travel

Lift Restrictions Explanation: Provide reason for MCC Groups restriction lift.

Temporary or Permanent: For any of the above requests you have made above, for example Single Purchase Transaction Limit, Month Card Transaction Limit or MCC Group restriction lifted. Please specify if these above request(s) are permanent or temporary request.

Permanent request: Please select this option if you would like any of the change requests above to remain as a permanent change on your card. **A new comment box will populate so further explanation can be provided for the request.** It is rare that Procurement will allow for any of the above changes to remain permanently on your card, however each permanent change request will be reviewed in detail by the Procurement Manager, to determine if it should be allowed or not.

Temporary request: Please select this option if the change requests above are temporary.

Cancelling Card: Are you completing this form with the intention of cancelling your Purchasing Card. If yes, please select **Yes** from the drop-down menu. If not, please select **No**.

Receipts and Statements: Are the Card Receipts and Purchasing Card statements current maintained by the Office Administrator of Audit purposes? Please select either **Yes** or **No** from the drop-down menu.

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.

MCC Groups Lift Restrictions [?](#)

Check Appropriate Box(es) and provide reason:

 ✕

Lift Restrictions Explanation [?](#)

Provide Reason for MCC Groups restriction lift:

Temporary or Permanent? [?](#)

Is the above request a permanent or temporary request?

Permanent Temporary

Cancelling a Card [?](#)

Request to Cancel a Card?

 ✕

Receipts and Statements [?](#)

Card Receipts and statements are kept with Office Administrator for Auditors:

 ✕

Request Approval [?](#)

By checking this box I confirm that all information included in this ticket is correct and I confirm that I have reviewed 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 resolving this issue or fulfilling your request.

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

Effective Date ⓘ

Please choose the effective date of change.

12/2/2022

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 | x₂ | x₃ | I_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.)

Browse... 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.

University of Windsor

Home | Help | Projects/Workspaces | **Services** | Knowledge Base | Questions | Reports

Ticket Requests | My Favorites | My Recent | My Approvals | Services A-Z | Search

✔ **Request Created Successfully!**

Service Request ID: 16110628

What do you want to do now?

- [Create another request of this type](#)
- [View the request you just created](#)
- [View your ticket requests](#)

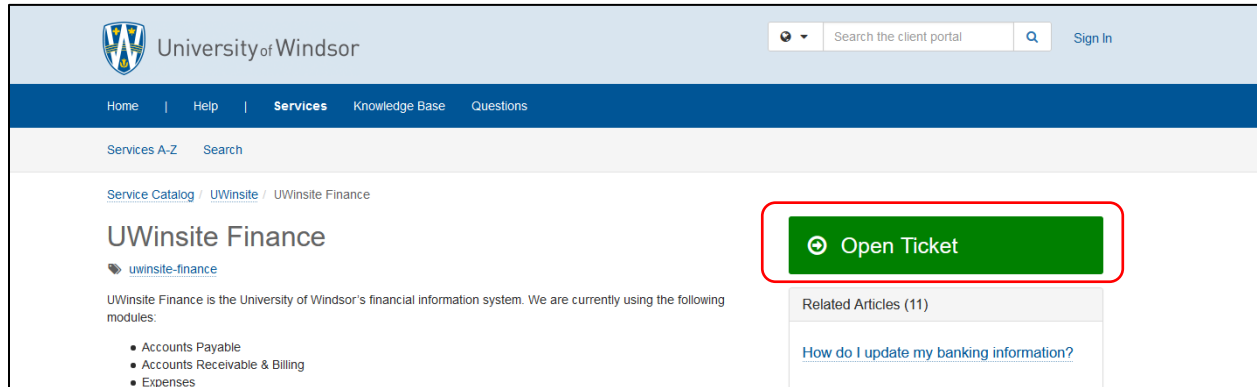
The ticket is submitted to the **Corporate Card and Supplier Assistant** for review, and then must be approved by the **Procurement Manager**. We will work to process the request as soon as possible, and all tickets will be processed in a first come first serve order. We ask that you please allow a minimum 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 change request has been approved and the changes to your card have been

processed. Procurement may also reach out to you through the ticket, should they require any additional information to process the change request form.

Section 2: BTA Card Change Request Form:

1. To open a UWinsite Finance ticket to submit a change request for a BTA Card, please go to:
<https://uwindsor.teamdynamix.com/TDClient/1975/Portal/Requests/ServiceDet?!D=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 Change Request** 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 Change Request Form, 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 Change Request 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 Change 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 Change 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 Change Request you are submitting. There are two options:

- BTA Card
- P Card
- Travel

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 Change 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 Travel Card, or a P Card?

BTA Card P Card Travel Card

Card Digits: Please enter only the **last 4 digits** of the card you are requesting the change for.

Date of Request: Please enter the current date.

Card Digits ⓘ

Enter the last four digits of the card:

Date of Request

BTA Card Monthly Limit Change Request: The current Monthly Card Transaction Limit is set at **\$15,000** for all BTA Cards. If you would like to request a change to this limit, please complete this field. In the blank field enter the dollar value of the requested change to the Monthly Card Transaction Limit. (For example, if you would like to increase the Monthly Card Transaction Limit to \$20,000 please enter “20000” in this field). Do not include “,” or “\$” in this field.

Limit Change Explanation: In this field provide a detailed explanation for why you are requesting the increase to the Monthly Card Limit.

BTA Monthly Limit Change ⓘ

Current Monthly Limit: \$15,000

Enter the Requested Monthly Limit, if different:

Limit Change Explanation ⓘ

Explanation for the Increase:

I have a significant number of purchases to place on my BTA card this month, therefore i will required the Monthly Credit Transaction Limit increased to \$20,000 to allow all the transactions to be processed.

Temporary or Permanent: Please specify if the above request is permanent or temporary request.

Permanent request: Please select this option if you would like any of the change requests above to remain as a permanent change on your card. **A new comment box will populate so further explanation can be provided for the request.** It is rare that Procurement will allow for any of the above changes to remain permanently on your card, however each permanent change request will be reviewed in detail by the Procurement Manager, to determine if it should be allowed or not.

Temporary request: Please select this option if the change requests above are temporary.

Cancelling Card: Are you completing this form with the intention of cancelling your BTA Card. If yes, please select **Yes** from the drop-down menu. If not, please select **No**.

Receipts and Statements: Are the Card Receipts and BTA Card statements current maintained by the Office Administrator of Audit purposes? Please select either **Yes** or **No** from the drop-down menu.

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.

Temporary or Permanent? ⓘ
Is the above request a permanent or temporary request?
 Permanent Temporary

Cancelling a Card ⓘ
Request to Cancel a Card?
No

Receipts and Statements ⓘ
Card Receipts and statements are kept with Office Administrator for Auditors:
Yes

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 resolving this issue or fulfilling your request.

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

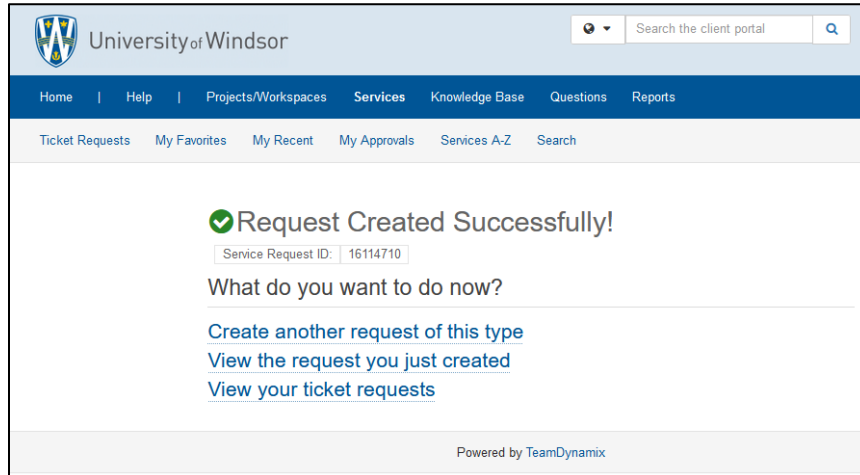
Effective Date ⓘ
Please choose the effective date of change.
12/2/2022

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 x₂ x^a I_x
[Rich text editor toolbar with icons for list, link, image, video, and other formatting options]

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.)
Browse... 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.

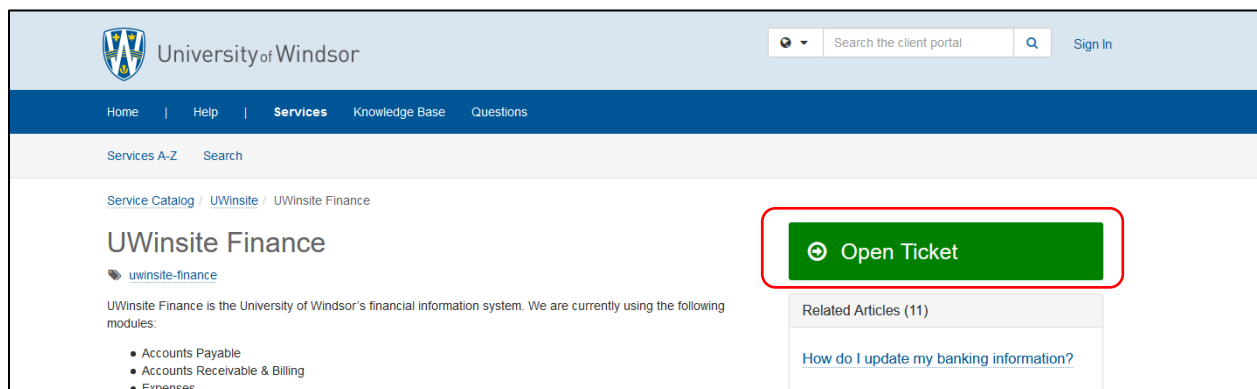


The ticket is submitted to the **Corporate Card and Supplier Assistant** for review, and then must be approved by the **Procurement Manager**. We will work to process the request as soon as possible, and all tickets will be processed in a first come first serve order. We ask that you please allow a minimum 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 change request has been approved and the changes to your card have been processed. Procurement may also reach out to you through the ticket, should they require any additional information to process the change request form.

Section 3: Travel Card Change Request Form:

1. To open a UWinsite Finance ticket to submit a change request for a Travel 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.



The screenshot displays the University of Windsor's UWinsite Finance portal. At the top, the University of Windsor logo and name are visible on the left, and a search bar with the text "Search the client portal" and a "Sign In" link are on the right. Below the header is a navigation bar with links for "Home", "Help", "Services", "Knowledge Base", and "Questions". The main content area shows a breadcrumb trail: "Service Catalog / UWinsite / UWinsite Finance". The title "UWinsite Finance" is prominently displayed, followed by a small icon and the text "uwinsite-finance". Below this, a description states: "UWinsite Finance is the University of Windsor's financial information system. We are currently using the following modules:" followed by a bulleted list: "Accounts Payable", "Accounts Receivable & Billing", and "Expenses". On the right side of the page, there is a green button with a white plus icon and the text "Open Ticket", which is highlighted with a red rectangular box. Below the button, there is a section titled "Related Articles (11)" with a link that reads "How do I update my banking information?".

3. You will be taken to the UWin site Finance ticket screen. Below are instructions specifically for placing a **Travel Card Change Request** 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 Change Request Form, please leave it set to this.

The screenshot shows a form with four sections:

- Requestor *** (with a help icon and user icon): A dropdown menu containing "Rachel McRae (Staff)". Below the dropdown is a search icon and a close icon (X).
- UWin ID *** (with a help icon): A text input field containing "warnockr". Below the field is the text "please provide UWINID".
- Acct/Dept *** (with a help icon): A dropdown menu containing "Financial Accounting and Reporting". Below the dropdown is a search icon and a close icon (X).
- Impact *** (with a help icon): A dropdown menu containing "Affects Person".

Urgency: Please select the urgency for importance of the request. If the Change Request 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 Change 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 Change Request**.

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

Card Type: Please select the appropriate card type for the Change Request you are submitting. There are two options:

- BTA Card
- P Card
- Travel

For this example, we will select **Travel 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 Change 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 Travel Card, or a P Card?

BTA Card P Card Travel Card

Card Digits: Please enter only the **last 4 digits** of the card you are requesting the change for.

Date of Request: Please enter the current date.

Card Digits ⓘ
Enter the last four digits of the card:

1234

Date of Request

12/2/2020

Travel Card Monthly Limit Change Request: The current Monthly Card Transaction Limit is set at **\$15,000** for all Travel Cards. If you would like to request a change to this limit, please complete this field. In the blank field enter the dollar value of the requested change to the Monthly Card Transaction Limit. (For example, if you would like to increase the Monthly Card Transaction Limit to \$20,000 please enter “20000” in this field). Do not include “,” or “\$” in this field.

Limit Change Explanation: In this field provide a detailed explanation for why you are requesting the increase to the Monthly Card Limit.

Travel Card Monthly Limit Chang ⓘ
Current Monthly Limit: \$15,000
Enter the Requested Monthly Limit, if different:

Limit Change Explanation ⓘ
Explanation for the Increase:

Temporary or Permanent: Please specify if the above request is permanent or temporary request.

Permanent request: Please select this option if you would like any of the change requests above to remain as a permanent change on your card. **A new comment box will populate so further explanation can be provided for the request.** It is rare that Procurement will allow for any of the above changes to remain permanently on your card, however each permanent change request will be reviewed in detail by the Procurement Manager, to determine if it should be allowed or not.

Temporary request: Please select this option if the change requests above are temporary.

Cancelling Card: Are you completing this form with the intention of cancelling your Travel Card. If yes, please select **Yes** from the drop-down menu. If not, please select **No**.

Receipts and Statements: Are the Card Receipts and Travel Card statements current maintained by the Office Administrator of Audit purposes? Please select either **Yes** or **No** from the drop-down menu.

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.

Temporary or Permanent? ⓘ

Is the above request a permanent or temporary request?

Permanent Temporary

Cancelling a Card ⓘ

Request to Cancel a Card?

No

Receipts and Statements ⓘ

Card Receipts and statements are kept with Office Administrator for Auditors:

Yes

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 resolving this issue or fulfilling your request.

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

Effective Date ⓘ
Please choose the effective date of change.

12/2/2022

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 | x₂ | x_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.)

Browse... | 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.

University of Windsor

Search the client portal

Home | Help | Projects/Workspaces | Services | Knowledge Base | Questions | Reports

Ticket Requests | My Favorites | My Recent | My Approvals | Services A-Z | Search

✔ Request Created Successfully!

Service Request ID: 16114710

What do you want to do now?

[Create another request of this type](#)

[View the request you just created](#)

[View your ticket requests](#)

Powered by TeamDynamix

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 change request has been approved and the changes to your card have been processed. Procurement may also reach out to you through the ticket, should they require any additional information to process the change request form.