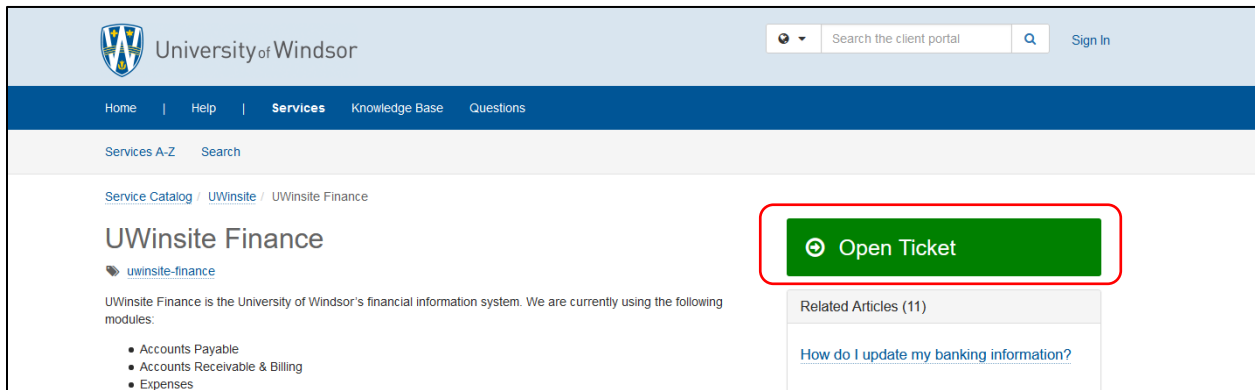


User Guide: How to Complete a Team Dynamix Ticket for a General Issues and Request Related to the Credit Card Program

Updated: March 14, 2024

1. To open a UWinsite Finance ticket to reset your CentreSuite password, add an account string, report a transaction issue, or any other general inquiry, 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.
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 this request, 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 **Corporate Card Program - General Issues** from the drop-down menu.

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

Urgency * ⓘ ⓘ

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

Medium

Request Type * ⓘ ⓘ

What is the nature of your request?

Credit Card Program – General Issues

Title * ⓘ ⓘ

A short description to explain the nature of a ticket.

UWinsite Finance Support Request

Additional Comments: In the field provided, please note your specific request. Be sure to provide 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.

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, x² 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.

The screenshot shows the University of Windsor portal interface. At the top left is the University of Windsor logo. To the right is a search bar. Below the logo is a navigation menu with links: Home, Help, Projects/Workspaces, Services, Knowledge Base, Questions, and Reports. Underneath this is a secondary menu 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 text box shows "Service Request ID: 16110628". Underneath is the question "What do you want to do now?" 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**, depending on the nature of the request. 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 change request form.