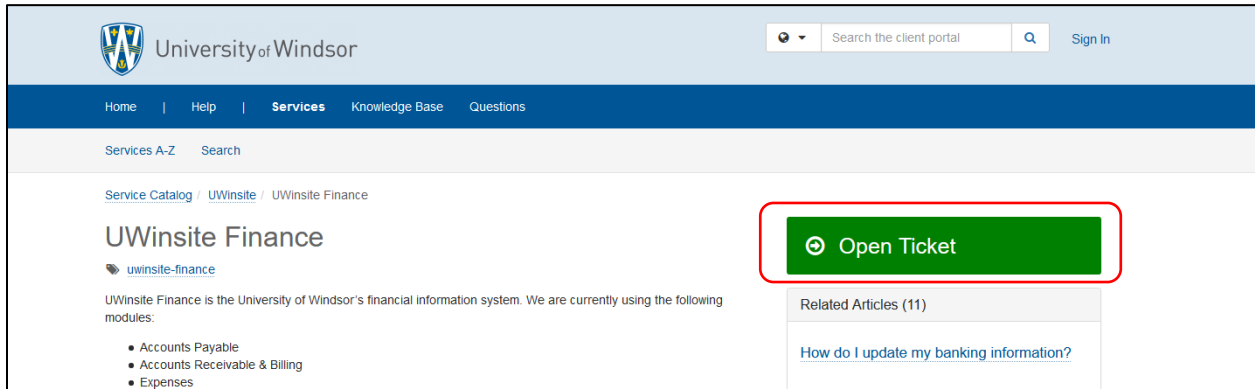


# User Guide: How to Complete a Travel Card Application Using Team Dynamix

Updated: March 14, 2024

1. To open a UWinsite Finance ticket to apply 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.





3. You will be taken to the UWinsite Finance ticket screen. Below are instructions specifically for placing a **Travel 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 the 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 Travel 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 Travel 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 **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 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

**Cardholder's Name:** Please enter the Cardholder's Name as it should appear on the credit card. Please note that the cardholders full name cannot exceed 21 characters.

**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.

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

<b>Cardholder's Name</b> ? Enter the Cardholder's Name as it should appear on the card (21 Character Limit on Full Name) <input type="text" value="John Smith"/>
<b>Department Name</b> ? 21 character limit on full name <input type="text" value="Finance Department"/>
<b>Phone Extension</b> ? Contact Individuals' Business Phone Number: (519) 253-3000 ext. ____ <input type="text" value="1234"/>
<b>Significant Date</b> ? 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). <input type="text" value="12022020"/>

### 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/](https://met.uwindsor.ca/quizzes/purchasing_bta/)

P Card: [https://met.uwindsor.ca/quizzes/purchasing\\_card/](https://met.uwindsor.ca/quizzes/purchasing_card/)

Travel Card: [https://met.uwindsor.ca/quizzes/purchasing\\_travel/](https://met.uwindsor.ca/quizzes/purchasing_travel/)

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

<b>Quiz Completed</b> ? Complete the Card Training/Quiz before you can pick up your card. Go to: BTA: <a href="https://met.uwindsor.ca/quizzes/purchasing_bta/">https://met.uwindsor.ca/quizzes/purchasing_bta/</a> P Card: <a href="https://met.uwindsor.ca/quizzes/purchasing_card/">https://met.uwindsor.ca/quizzes/purchasing_card/</a> Travel Card: <a href="https://met.uwindsor.ca/quizzes/purchasing_travel/">https://met.uwindsor.ca/quizzes/purchasing_travel/</a>  <input checked="" type="checkbox"/> Quiz Completed
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**Dollar Limit - Travel:** 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

**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.

**Dollar Limit - Travel** ⓘ

Monthly Spending Limit: \$ 15,000

I Understand

**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<sub>o</sub> x<sup>o</sup> | T<sub>o</sub>

☰ ☲ ☳ ☴ ☵ ☶ ☷

**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 displays the University of Windsor portal interface. At the top left is the university's logo and name. A navigation bar contains links for Home, Help, Projects/Workspaces, Services, Knowledge Base, Questions, and Reports. Below this is a secondary navigation bar with links for Ticket Requests, My Favorites, My Recent, My Approvals, Services A-Z, and Search. The main content area features a green checkmark icon followed by the text "Request Created Successfully!". Below this, a box displays "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.