# TRAX - PeopleSoft Financials
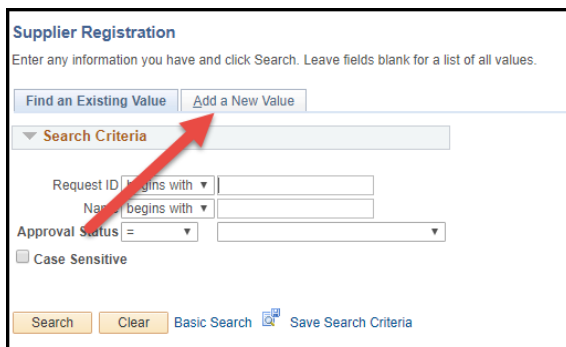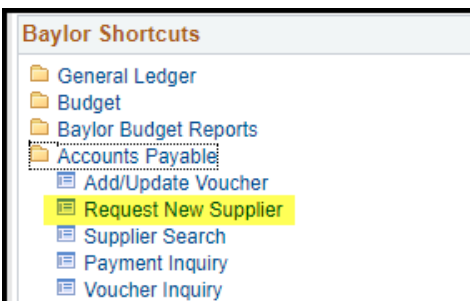
Users should begin the process of requesting a new supplier at the beginning of the purchase cycle, instead of the end. The instructions contained in this document are intended for regular and foreign suppliers, as well as faculty, staff, and students that have not already been established in the TRAX system.

There are over 15,000 suppliers in our system. Please make sure you carefully check the *Supplier Search* to ensure that the supplier doesn't already exist in our system (see Voucher or Requisition documentation for more detailed instructions if you are not familiar with the *Supplier Search*). After ensuring the supplier does not exist, proceed with the New Supplier Request, as outlined in the steps below. This process should be started as far in advance of the purchase as possible in order to ensure the supplier information is made available from the TRAX supplier database for you to complete your requisition or voucher. Please allow up to **two weeks** for this process to be completed.



➢ Accounts Payable
    ➢ Request New Supplier



➢    Click *Add A New Value* to enter a new Supplier request. You can also click *Search* to find a previous requests in progress or completed. (You can only see requests you have initiated).

➢ The first page contains *Instructions* including links to Accounts Payable and Procurement policy, as well as links to some forms you may be required to attach to have the supplier approved for Baylor business use.

➢ After reviewing the *Instructions*, click the *Request Form* tab.



➢ From the dropdown list, select the type of entity (business, individual, employee, or student).



➢ Begin entering the details about the supplier. Fields marked with an asterisk (*) are required.

## Profile

- *Foreign Entity* checkbox – use this to designate this person or business as foreign
- *ACH (Direct Deposit) Enabled* checkbox – use this to signify that the person or business has requested to be paid via ACH/Direct Deposit. The form can be found by clicking the link below and can be attached at the bottom of this page.
- *Name* field – this is the name of the business (required)
- *URL* field – this is the website of the business
- *Purpose* field – you intend to pay this person via Voucher or Requisition (choose one)
- *Tax Classification* field – this can be provided by the business
- *Provision* field – choose from the dropdown list
- *Provision Details* field – Why are you paying this person or business? Provide any additional details about the supplier that you feel will help Baylor administrative staff process the request.
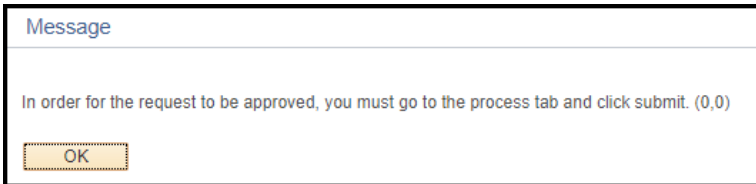
## Contact Information

- Provide contact information in this section. Name, email, Address 1, City, State, Zip, and Country are required fields.

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- At the bottom of the form, click the *Attach* button to upload the necessary form(s) for your supplier. A W-9 is required on all new suppliers. You will also use this section to include Direct Deposit forms.
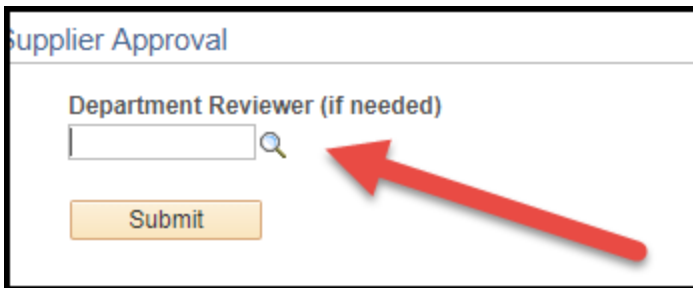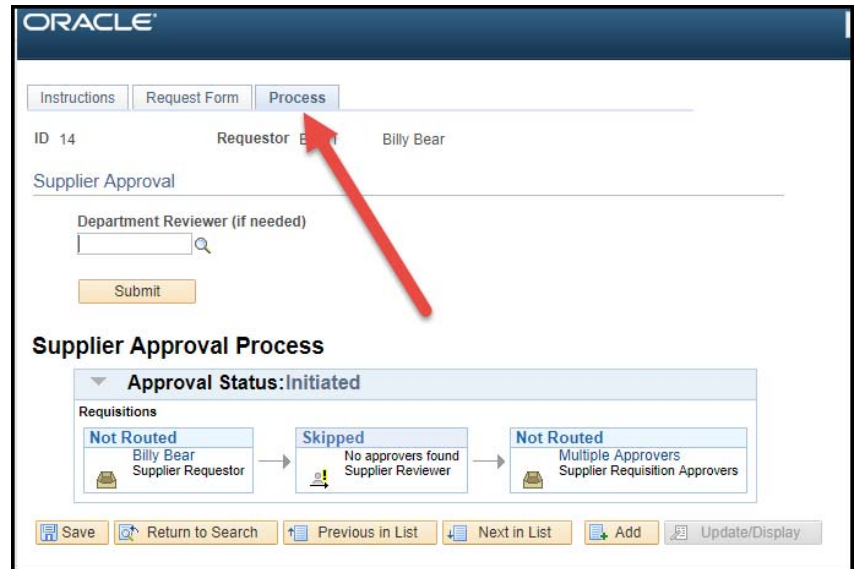
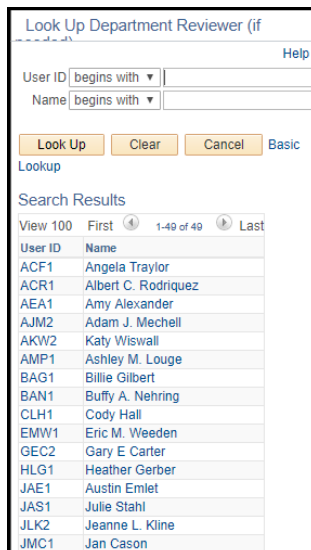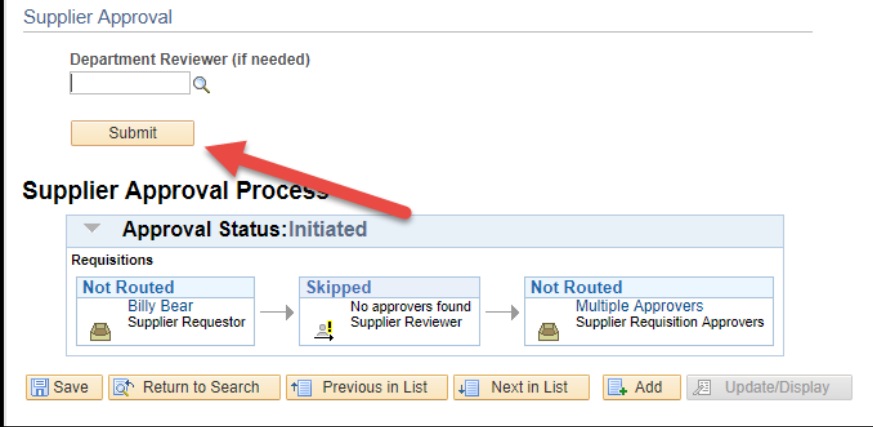- Click the *Save* button when complete.

**Message**

In order for the request to be approved, you must go to the process tab and click submit. (0,0)

OK

➢ After clicking the *Save* button, this message will appear. Click *OK*.

➢ Click the *Process* tab. This area shows the approval path for this request. Note: the review process does not begin until the *Submit* button is clicked.

**ORACLE**

| Instructions | Request Form | Process |

ID  14                          Requestor  Billy        Billy Bear

**Supplier Approval**

Department Reviewer (if needed)

Submit

**Supplier Approval Process**

▼  **Approval Status: Initiated**

Requisitions

| Not Routed | | Skipped | | Not Routed |
| --- | --- | --- | --- | --- |
| Billy Bear | → | No approvers found | → | Multiple Approvers |
| Supplier Requestor | | Supplier Reviewer | | Supplier Requisition Approvers |

| 🖫 Save | 🔍 Return to Search | ⬆ Previous in List | ⬅ Next in List | ➕ Add | 🔲 Update/Display |

**Supplier Approval**

**Department Reviewer (if needed)**

Submit

➢ Optional: If your department has an internal process that requires a secondary reviewer, use the magnifying glass to select the appropriate budget manager. Only those individuals that have been designated as a Key Budget Contact will appear. If your department does NOT require this secondary review, simply skip this section.
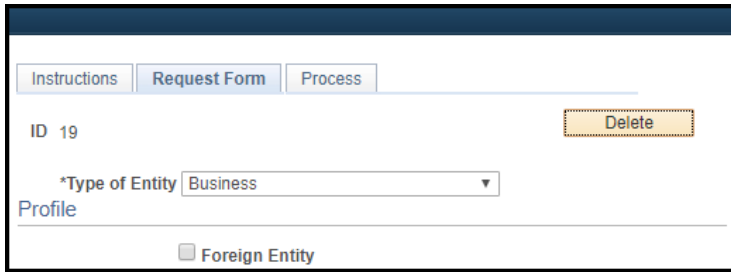
Look Up Department Reviewer (if needed)

Help

User ID  begins with ▼
Name  begins with ▼

| Look Up | Clear | Cancel | Basic Lookup |

Search Results

View 100  First ◀  1-49 of 49  ▶ Last

| User ID | Name |
| --- | --- |
| ACF1 | Angela Traylor |
| ACR1 | Albert C. Rodriquez |
| AEA1 | Amy Alexander |
| AJM2 | Adam J. Mechell |
| AKW2 | Katy Wiswall |
| AMP1 | Ashley M. Louge |
| BAG1 | Billie Gilbert |
| BAN1 | Buffy A. Nehring |
| CLH1 | Cody Hall |
| EMW1 | Eric M. Weeden |
| GEC2 | Gary E Carter |
| HLG1 | Heather Gerber |
| JAE1 | Austin Emlet |
| JAS1 | Julie Stahl |
| JLK2 | Jeanne L. Kline |
| JMC1 | Jan Cason |

➢ When you are ready for your request to be reviewed, click *Submit* to send it for processing.

➢ Once you have clicked *Submit* the Approval Status will change from *Initiated* to *Pending*.
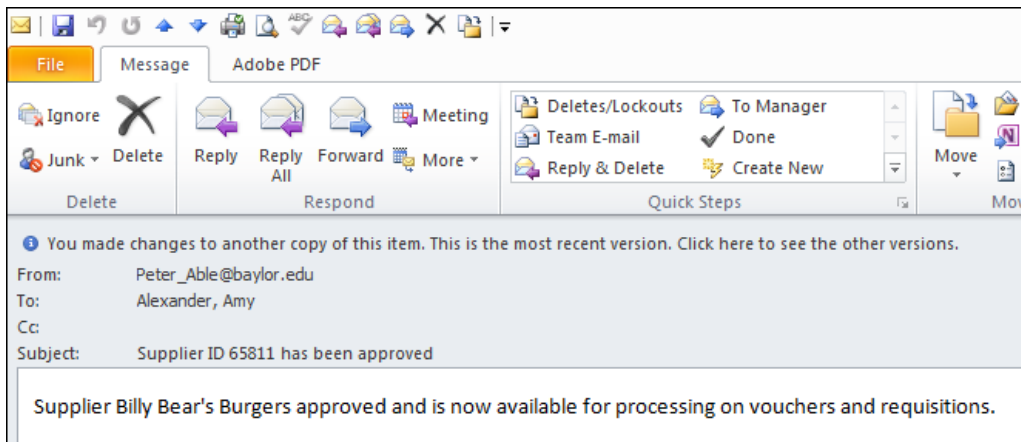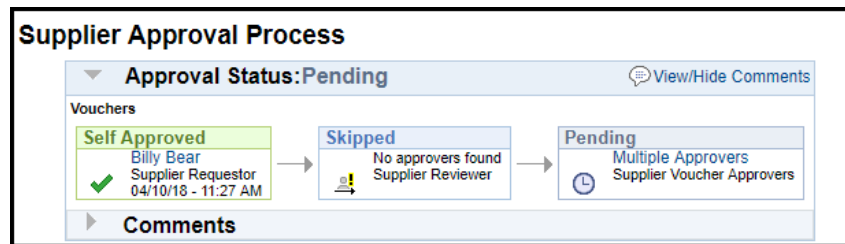




➢ You will receive an email notification when the supplier is approved and ready for use in TRAX. At this point you can proceed with entering your voucher or requisition.
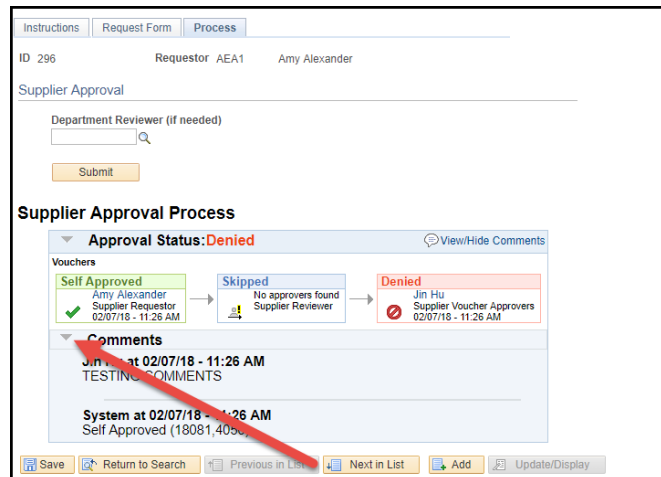
**Note:**



➢ After your request has been saved a *Delete* button appears. If, for any reason, you need to *Delete* this request, you may do so by clicking this button.

➢ If your request has been *Denied* for any reason, you may find the details of the denial by revisiting your request, clicking the *Process* tab, and then clicking to expand the *Comments* section.