TRAX (PeopleSoft Financials)

MONTHLY NEWSLETTER   **JULY, 2011**

Grants Implementation

Baylor University recently implemented the Grants module of the TRAX (or PeopleSoft) system. This project has been an ongoing effort for many months and will have an effect on numerous business processes campus-wide. The degree to which you will be affected will vary from person to person, however, it is important for all TRAX users to become familiar with the changes. If you missed the opportunities for classroom training, online training is available 24 hours a day, 7 days a week at: www.baylor.edu/traxhelp. Simply click on the "Grants" link. If you have additional questions, please contact us at trax@baylor.edu.

Report Changes

Due to year-end processing, an extended period of time may have elapsed since you last ran a Detail Budget Report. Many new changes have been introduced as a result of the Grants implementation, but one of those changes affects the options that are available in the Budget Reports menu. If you have familiarized yourself with the Grants changes, you are aware of the new Project chartfield that is now in place for all grant-related budgets in TRAX. With the new Project chartfield comes new reporting options.

For example, if you need to run a report for a Grant for FY 2012, then you will need to replace the *Detail Budget Report* option you have been using in the past with the new *Detail Budget Report by Project* option. If you are running a report for a non-grant related item, then continue to use the *Detail Budget Report* option you have always used. Also, please note that if you need to run a FY 2011 report for a grant-related budget, you will also use the "old" option (*Detail Budget Report*), as the new Project chartfield changes were implemented June 1 with the new fiscal year.

With all reports, remember to always choose a start date at the beginning of the month. The end date should be at least one day later and you should not overlap two different fiscal years.

For an overview of all of the Budget menu changes, be sure to check out the Budget/Reporting online training video at www.baylor.edu/traxhelp/onlinetraining.

Who To Contact?

Not sure who to contact about a particular charge that shows up on your Detail Report? The TRAXHelp website has a listing, organized by code, of individuals to contact about those charges. This list can be found by visiting www.baylor.edu/traxhelp > *Documentation > Who To Contact*. You can also access the list directly by clicking here.

Need Help with TRAX?

Need technical assistance? Forgot your password? Don't forget the TRAX hotline is available Monday through Friday, 8-5. Simply dial **x8704**, select the appropriate option, and you'll be connected with the right department.

TRAX Security Requests

If you have security requests for TRAX or need additional department security authorizations, please direct those requests to TRAX@baylor.edu or to Amy_E_Alexander@baylor.edu. Please be aware that, for audit purposes, written documentation is required for all security changes.

New Users

If you know someone who needs to obtain a TRAX (PeopleSoft) user ID, please have them go to the Getting Started link on the TRAXHelp website and follow the instructions there.

TRAX Training

TRAX training classes are scheduled through the end of August. A list of TRAX classes is now available on the TRAXHelp website. To sign up for training, please visit the Professional Development Seminar Online Registration page. If you have difficulty signing up for TRAX training, contact TRAX@baylor.edu.

Need Help?

TRAX Hotline

710.8704

www.baylor.edu/traxhelp

trax@baylor.edu

Self-Service Help ▶▶▶