



## Appendix

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## Financial Transaction Help list

Transaction	Document Used	Procedural Highlights
<b>Purchases:</b>	Except travel, technology purchases and Baylor Facility Services	see separate sections
Less than \$10,000 (non-sponsored) or less than \$3,000 (sponsored)	Purchasing Card	Preferred method; see Purchasing Card policies & procedures ( <a href="http://www.baylor.edu/Purchasing">http://www.baylor.edu/Purchasing</a> )
Less than \$10,000 and Purchasing Card not accepted (non-sponsored) or less than \$3,000 (sponsored)	TRAX Voucher	Forward invoice or other documentation with Voucher Number, Account/Department Number and approval signature to Accounts Payable Office
> \$10,000 (non-sponsored) or > \$3,000 (sponsored)	TRAX Requisition	<ul style="list-style-type: none"> <li>• Use standard comment (RFQ) to document three quotes</li> <li>• Approve and budget check requisition</li> <li>• PO issued</li> </ul>
\$25,000 or greater	TRAX Requisition	<ul style="list-style-type: none"> <li>• Select Request for Quote (RFQ) as Origin</li> <li>• Approve and budget check requisition</li> <li>• Budget Office must approve requisition</li> <li>• Purchasing Office will obtain bids and select vendor in coordination with department</li> <li>• PO issued</li> </ul>
<b>Budget Change Request</b>	Budget Change Request (BCR) form	Online Budget Change Request form in TRAX
<b>Technology Purchases</b>	All technology purchases need to be made through the <i>Purchasing Technology Procurement Website</i> which can be found on the <i>Purchasing and Campus Services Web Page</i> ( <a href="http://www.baylor.edu/Purchasing/">http://www.baylor.edu/Purchasing/</a> )	Purchasing & Campus Services will enable the purchase of Apple computer systems and Dell computer systems through the respective websites. Payment settlement will be made with a Baylor Purchasing Card.



Transaction	Document Used	Procedural Highlights
<b>Cancel Documents:</b>		
Requisition	End users can do this on <i>Add/Update Requisitions</i> page	<ul style="list-style-type: none"> <li>• Requisition               <ul style="list-style-type: none"> <li>• Add/Update Requisitions</li> </ul> </li> <li>• Click <i>Find an Existing Value</i></li> <li>• Enter <i>Requisition ID</i></li> <li>• Click <i>Cancel</i> (Red 'X' by <i>Requisition Status</i> in top right-hand corner of Requisition page.)</li> <li>• Click <i>Yes</i></li> </ul> <p>Funds may not be returned to your budget until the next day. E-mail buyer in Purchasing Office for faster return of funds</p>
Purchase Order	E-mail to Buyer in Purchasing	Notify Purchasing Office ASAP of Purchase Order number when item is no longer needed
Voucher	E-mail to <a href="mailto:Accounts_Payable@baylor.edu">Accounts_Payable@baylor.edu</a>	Notify Accounts Payable Office ASAP of Voucher number when Voucher is not needed or accounting distribution must be revised after passing budget check
Department Deposit Receipts	End Users can do this on the <i>Department Deposit</i> page	<ul style="list-style-type: none"> <li>• Departmental Receipts               <ul style="list-style-type: none"> <li>• Departmental Receipts</li> </ul> </li> <li>• Click <i>Find an Existing Value</i></li> <li>• Enter <i>Transaction ID</i></li> <li>• Click <i>Void</i></li> <li>• Click <i>Save</i></li> </ul> <p>A Deposit Receipt cannot be voided after it has been processed by the Cashier's Office</p>
Departmental Adjustment Requests	End Users can do this on the <i>Department Adjustment</i> page	<ul style="list-style-type: none"> <li>• Accounting               <ul style="list-style-type: none"> <li>• Departmental Adjustment</li> </ul> </li> <li>• Click <i>Find an Existing Value</i></li> <li>• Enter <i>Transaction ID</i></li> <li>• Click <i>Void</i></li> <li>• Click <i>Save</i></li> </ul> <p>A Departmental Adjustment Request cannot be voided after it has been processed by Accounting</p>
Budget Change Request	End Users can do this on the <i>Budget Change Request</i> page	<ul style="list-style-type: none"> <li>• Budget               <ul style="list-style-type: none"> <li>• Budget Change Request</li> </ul> </li> <li>• Click <i>Find an Existing Value</i></li> <li>• Enter <i>Transaction ID</i></li> <li>• Click <i>Void</i></li> <li>• Click <i>Save</i></li> </ul>
<b>Interdepartmental Charges</b>	Departmental Adjustment Requests	<ul style="list-style-type: none"> <li>• Enter Departmental Adjustment Request</li> <li>• Notify Approver(s)</li> <li>• Approve Line(s)</li> <li>• Send supporting documentation to Accounting</li> </ul>
<b>Petty Cash</b> (New funds & Travel and Entertainment reimbursements)	On-line Expense Report ( <a href="http://www.baylor.edu/travel">www.baylor.edu/travel</a> )	<ul style="list-style-type: none"> <li>• Petty Cash is replaced by the Purchasing Card and the Travel Card</li> </ul>



Transaction	Document Used	Procedural Highlights
<b>Request for Check:</b> Less than \$10,000 (sponsored or non-sponsored)	TRAX Voucher	<ul style="list-style-type: none"> <li>• Enter AP Voucher including supporting documentation</li> <li>• Accounts Payable Office will <u>not</u> process Voucher until documentation is received</li> </ul>
\$10,000 or greater (sponsored or non-sponsored)	TRAX Requisition	<ul style="list-style-type: none"> <li>• Select Request for Check (RFC) as Origin</li> <li>• Approve and budget check requisition forward supporting documentation with Requisition Number to Purchasing Office</li> <li>• No PO sent to vendor</li> <li>• Not be used for travel reimbursement</li> </ul>
<b>Standing Order</b>	TRAX Requisition	<ul style="list-style-type: none"> <li>• Select Standing Order (SO) as Origin</li> <li>• Use standard comment (SO) for justification</li> <li>• Approve and budget check requisition</li> </ul>
<b>Supplemental Purchase Order</b>	TRAX Requisition	<ul style="list-style-type: none"> <li>• Select Supplemental Order (SUP) as Origin</li> <li>• Use standard comment (SUP) for justification</li> <li>• Approve and budget check requisition</li> <li>• Supplemental PO issued</li> </ul>
<b>Telephone Services</b>	Telephone Services Request form	<ul style="list-style-type: none"> <li>• Paper form to Telephone Services Office</li> <li>• Journal Voucher (JV) made by Accounting Operations Office to expense</li> </ul>
<b>Travel:</b>	(See University Travel Policy)	
Advance (Student Group / Team Travel)	TRAX Requisition	<ul style="list-style-type: none"> <li>• Travel Advances are no longer offered for individual travel</li> </ul>
Airline Tickets	Travel Agency Authorization Form	<ul style="list-style-type: none"> <li>• E-mail Travel Agency Authorization Form to approved Travel Agency</li> <li>• OR use Baylor Travel Card</li> <li>• OR use Personal Credit Card</li> </ul>
Reimbursement	On-line Expense Report (www.baylor.edu/travel)	<ul style="list-style-type: none"> <li>• Use Baylor Travel Card</li> <li>• OR use Personal Credit Card</li> </ul>
<b>Uninsured Loss</b>	TRAX Voucher or Requisition	<ul style="list-style-type: none"> <li>• On Requisition select Replacement of Stolen Goods (RSG) as Origin</li> <li>• Use standard comment (REP) for justification</li> <li>• Notify Budget Office of Police Report Number to initiate budget adjustment</li> </ul>
<b>Suppliers - New</b>	TRAX Requisition	<ul style="list-style-type: none"> <li>• Use Supplier Registration Process</li> <li>• Enter Req once Supplier is approved</li> </ul>
	TRAX Voucher	<ul style="list-style-type: none"> <li>• Use Supplier Registration Process</li> <li>• Enter Voucher once Supplier is approved</li> </ul>



## Supplier "Name 1" Naming Standards

Type the Supplier name as it is to appear on the check

<b>Guideline</b>	<b>Example</b>
Include pronouns and articles before and in the vendor name	The Brazos Club
Type a person's first name, then last name	Billy Bear
If the company name is a person, begin with the first name	John Wiley and Sons
Include appropriate punctuation (no periods between initials) Include apostrophes	The Cat's Meow
If initials stand for words, type a space between letters. If not, do not add spaces.	U S Towing Service <u>or</u> ABC Uniform Company
Type numbers as they appear on the invoice	1 2 3 Plumbing <u>or</u> Three Sisters Bakery
Use abbreviations only if the company name appears abbreviated on the invoice	PhoneCo <u>or</u> The Cable Company
Write a University name as it is written by the University	University of Texas <u>or</u> Texas A & M University
Write a foreign name as it appears on the invoice	Das Kapital Publishing



## Supplier "Short Name" Naming Standards

### Guideline

### Example

Exclude pronouns and articles before and in the Vendor name

Brazos Clu

Type a person's last name followed by the first name with no comma separator

Bear Billy

If the company name is a person's name, begin with the first name

John Wiley

Exclude all punctuation  
(Do not put apostrophes in the Short Name)

Cats Meow

If initials stand for words, type a space between letters. If not, do not add spaces.

U S Towing or  
ABC Unifor

Type words to represent numbers

One Two Th or  
Three Sist

Abbreviate the specific words listed below

PhoneCo or  
Cable Co

American	Amer	National	Natl
Associates	Assoc	United States	US
Association	Assn	University	Univ
Company	Co	Service	Svc
Incorporated	Inc	Society	Soc
International	Intl	Texas	Tex

Enter the state or name of a University name followed by Univ

Tex Univ or  
Tex A & M

Write a foreign name as it appears on the invoice, including what may be prepositions in that language

Das Kapital



## Differences between Vouchers and Requisitions

	<u>Vouchers</u>	<u>Requisitions</u>
When do I enter it on the system?	After the item has been purchased	Before the item has been purchased
What is the maximum amount I can enter?	Up to \$9,999.99	Depends on your budget. Requisitions over \$25,000 must be approved by the Budget Office
How do I handle New Vendors/Suppliers? Can I cancel it?	Supplier Registration  No. Contact Accounts Payable to delete the Voucher.	Supplier Registration  Yes, until it becomes a Purchase Order. Contact the Purchasing Office to cancel a Purchase Order.
How do I approve it?	Click “Approve” button on Voucher Approval Framework page	Click “Approve” button on Req Approval Framework page
Am I finished?	Yes!	Not quite. You will need to sign the invoice when it comes in and route it to Accounts Payable.



### Budget Checking Errors

<b>Error</b>	<b>Resolution</b>
Exceeds Budget Tolerance	Transaction will overspend the expense budget for this range of accounts. <ul style="list-style-type: none"><li>• Confirm Department and Account</li><li>• Inquiry on Appropriation</li><li>• Complete Budget Change Request (BCR)</li></ul>
No Budget Exists	No budget was entered for the range of accounts in this department. <ul style="list-style-type: none"><li>• Confirm Department and Account</li><li>• Inquiry on Appropriation</li><li>• Complete Budget Change Request (BCR)</li></ul>
Budget is Closed	Budget Period is no longer open. <ul style="list-style-type: none"><li>• Confirm Department ID, Account &amp; Budget Year</li><li>• Contact Budget Office (x.2663)</li></ul>
Not Budget Checked	Budget Check has not yet been performed



## DDR Terminal Location Codes (for Credit Card Transactions)

<b>Terminal Location</b>	<b>Department Name</b>
4	Baylor U-Mobile Unit (This is the terminal that the Cashier's Office lends out.)
6	BU-Athletic Concessions
7	Armstrong Browning Library
8	Athletics
9	Athletics-Web
10	Communication Sciences & Disorders
11	Gift Office
12	Cashier's Office
13	Baylor U-Alumni Network
14	Baylor U-Campus Rec/SLC & Intramurals
15	Letterman Association
16	Baylor University Development-Fund Raisers
17	Mayborn Museum Ticketing
18	Mayborn Museum Gift Shop
19	Student Activities & Tickets
20	Student Publications
21	Theatre Department
23	Baylor U-Campus Programs
26	Baylor Admissions
27	Baylor U-Athletics Mobile



## Valid Operating Account Codes in TRAX Budget Period 2019

Account	Description	Account	Description
1529	Prepaid Expense/Other	931890	Contract Services Distributed
2160	State Sales Tax Payable	9319	Disposal Of Fixed Assets
216010	State Sales Tx Pay-Pennsylvania	9320	Production Expenses
216015	State Sales Tax Pay.-Tennessee	932020	Production Expense-Costumes
216020	State Sales Tax Pay-New York	932030	Production Expense-Make-Up
216025	State Sales Tax Pay-Nebraska	932060	Production Exp-Royalty/Scripts
216030	Sta Sales Tx Py-North Carolina	932070	Production Expense-Sets/Props
216035	State Sales Tax Pay-Louisiana	932075	Prod Exp-Electrical/Lighting
216040	State Sales Tax Pay.- Wash. DC	932077	Production Exp-Sound
216045	Sta Sales Tx Py-South Carolina	932080	Production Expense-Tickets
216050	State Sales Tax Pay.-Illinois	932085	Production Exp-Tickets-Comp
216055	State Sales Tax Pay-Washington	932091	Prod Exp-Book Copy Edit
216060	State Sales Tax Pay.-Californi	932092	Prod Exp-Book Composition
216065	State Sales Tax Pay.-Oklahoma	932093	Prod Exp-Book Proof
216070	State Sales Tax Pay.-Florida	932094	Prod Exp-Book Cover Design
216075	State Sales Tax Pay.-Virginia	932095	Prod Exp-Book PPB
216080	State Sales Tax Pay.-Georgia	932096	Prod Exp-Book Cover Rights
216085	State Sales Tax Pay.-Hawaii	932098	Prod Exp-Book Postage/Shipping
216090	State Sales Tax Pay.- Kentucky	9321	Programming Expense
2490	Other Deferred Income	932190	Programming Expense Distribute
5880	Miscellaneous Revenue	9333	Food Expense
588085	Handling Fees	9336	Garbage Pick-Up
5886	Special Prog/Serv Income	933690	Garbage Pick-Up Distributed
9303	Advertising	9337	Custodial Services/Housekeepin
9306	Awards	933790	Custodial Services-Distributed
9307	Negotiated Settlements-A/R W-O	9338	Home Event Expense
9308	Bad Debts	9339	Event Operations & Officials
9309	Depreciation Expense	933920	Event officials
9311	Accretion Expense	933990	Evnt Opers & Officials Distrib
9312	Bear Bucks Charge-Offs	934010	Guests & Speakers
9313	Cash-Over & Short	934020	Legal Fees
9314	Comp Tickets	934030	Architectural Fees
9315	Software Licensing	934040	Professional Accounting Svcs
9318	Contract Services	934080	Honorarium & Prof Fee-Domestic
931822	Massage Therapy	934083	Honor & Prof Fee-International
931824	Personal Training	934090	Honorarium-Reimb Exp-Domestic
931826	Bearobics	934093	Honor-Reimb Exp-International
931830	Rent	934098	Distributed Professional Fees
931840	Contract Services-Team Buildng	9342	Guests & Entertainment
931860	Contract Services-Computer Srv	934290	Guest & Ent - Meals Cost Dstrb
931870	Subcontracts up to \$25,000	9343	Housing Expense
931880	Subcontr in excess of \$25,000	934390	Housing Expense-Distributed
931888	Contract Services Aux Distrib		



Account	Description	Account	Description
9345	Indirect Expense	9380	Vehicle Costs
9348	Insurance - Hazards	938205	Travel-F/S Conf Regis-Domestic
9349	Int Assd To US Govt	938280	Travel-Faculty/Staff-Domestic
9350	Loan Cost-Int Assd US	938283	Travel-Fac/Staff-International
9352	Interest Expense	938285	Trav-F/SConf Reg-International
9355	Medical Expenses	938290	Travel-Distributed Costs
935590	Medical Expenses-Distributed	938905	Travel-Stdnt Conf Reg Domestic
935780	Personnel Recruitment-Domestic	938910	Travel Big12 Chmpshp-Domestic
935783	Personnel Recruit-Internationl	938980	Travel-Student-Domestic
935790	Personnel Recruiting Distribut	938983	Travel-Student-International
9358	Memberships	938985	TravStu Conf Reg International
935890	Memberships - Distributed Cost	938990	Travel Group - Distributed
9359	Postage	9390	Distributed Operational Costs
935990	Postage Distributed	939001	Distributed Cst-Residence Hall
9360	Repairs and Maintenance	939018	Distributed Cost-Contract Serv
936090	Repairs and Maint-Distributed	939021	Distributed Programming Expens
936190	Routine-Contract Maint Distrib	939025	Distributed Cost - Fac Rental
9363	Summer Maintenance	939036	Distributed Cost-Garbage
9364	Uninsured Costs	939037	Distributed Cost-Custodial
936770	Recruit Stdnt Charter/Domestic	939039	Distributed Cost-Evnt Security
936773	Recruit Students Charter/ Intl	939040	Distributed Cost-Honor&Prof Fe
936780	Recruiting Students-Domestic	939042	Distrib Cost-Guest & Ent-Meals
936783	Recruit Students-International	939043	Distributed Cost-Housing
936788	Recruiting Students-Aux Distrib	939055	Distributed Cost-Medical Exp
936790	Recruiting Students-Distributd	939057	Distrib Cost-Persnl Rec-Meals
9369	Credit Card Fees	939058	Distributed Cost-Memberships
9370	Supplies	939059	Distributed Cost-Mail
937005	Supplies - Audio/Visual Aids	939060	Distributed Cost-Repairs&Maint
937010	Supplies - Books & Periodicals	939061	Distributed Cst-Routine Maint
937050	Supplies - Laboratory	939067	Distrib Cost-Recruiting Studnt
937080	Supplies-Athletic Corp Sponsor	939070	Distributed Cost-Supplies
937090	Supplies - Distributed	939071	Distributed Cost-Central Dup
937095	Supplies-Purchasing Card	939072	Distributed Cost-Printing
9371	Duplicating/Copier Services	939076	Distributed Cost-Telephone
937130	Base Copier Charge	939082	Distributed Cost-Travel
937135	Per Copy Overage	939087	Distributed Cost-Special Proj
937140	Central Dupl/Copy Ctr Charges	939089	Distributed Cost-Group Travel
937190	Central Dupl/Copy Ctr Charges	939093	Distributed Cost-Utilities
9372	Printing	939095	Distributed Cost-Participant S
937290	Printing Cost-Distributed	9393	Utilities/Service Ctr Distr
9373	Licenses & Registration	9394	Utilities
9374	Property Tax	939401	Utilities - Electric
9375	Unrelated Business Income Tax	939402	Utilities - Water
9376	Telephone Expense	939403	Utilities - Gas
937690	Telephone Expense Distributed	939403	Utilities - Gas



<b>Account</b>	<b>Description</b>
9395	Participant Support
939510	Participant Teacher Stipends
939590	Participant Support-Distribute
9398	Misc-Annuity Pmts
9399	Miscellaneous Oper Exp
939990	Misc Oper Exp Distributed

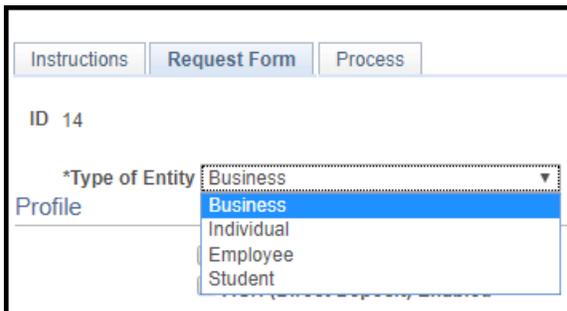
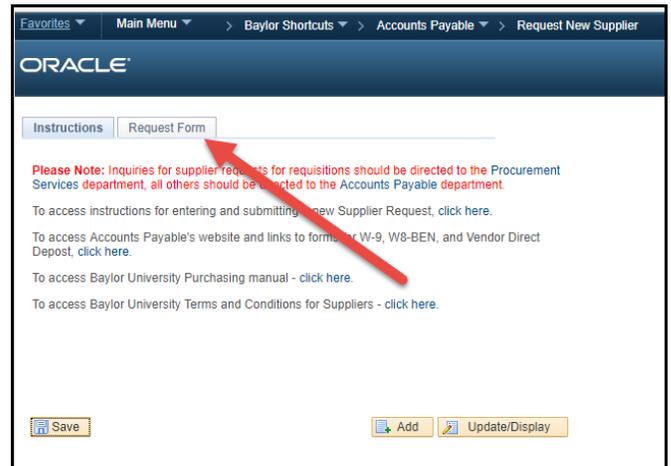


## New Baylor Supplier Request Process



- Suppliers
  - Request New Supplier

- Click *Request Form* 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).



- 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.



The screenshot shows a web form with tabs for 'Instructions', 'Request Form', and 'Process'. The 'Request Form' tab is active. The form has a 'Delete' button and 'ID 14'. Under 'Profile', there is a dropdown for '\*Type of Entity' set to 'Business'. Below are checkboxes for 'Foreign Entity' and 'ACH (Direct Deposit) Enabled'. The 'ACH (Direct Deposit) Form' section includes fields for '\*Name' (Bear Grills Restaurant), 'URL', '\*Purpose' (Ordering via Requisition), '\*Tax Classification', '\*Provision' (Goods), and '\*Provision Details'. The 'Contact Information' section includes fields for '\*Name' (Joe Baylor), 'Phone' (123/456-7890), '\*Email' (joe\_baylor@baylor.edu), 'Fax', '\*Address Line 1' (123 Main), 'Address Line 2', 'Address Line 3', '\*City' (Waco), '\*State' (TX), '\*Zip', and '\*Country' (USA).

## 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.

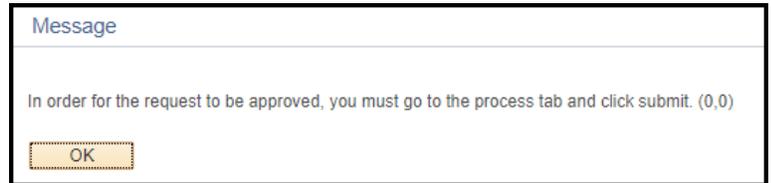
- At the bottom of the form, click the *Attach* button to upload the necessary form(s) for your supplier. A W-9 is required on all new suppliers. You will also use this section to include Direct Deposit forms.

The screenshot shows the 'Attachments' section with a note: 'Please make sure to have the appropriate W-9 and W-8 forms (e.g. W-8BEN or W-8BEN-E) as provided by the IRS.' Below is a table with one row: '1 Copy of W9 Form'. To the right of the table are buttons for 'Attach', 'View', '+', and '-'. At the bottom are buttons for 'Save', 'Add', and 'Update/Display'. A red arrow points to the 'Attach' button.

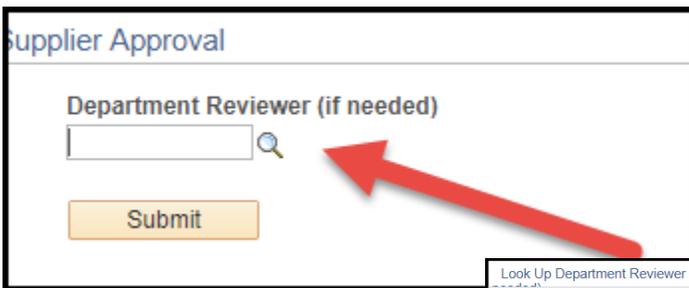
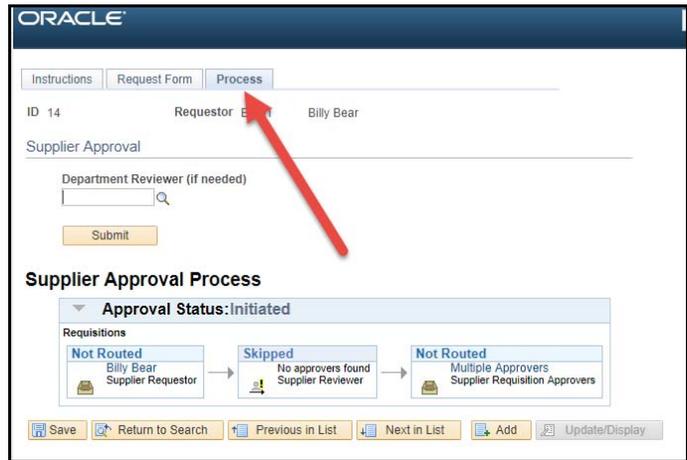


- Click the *Save* button when complete.

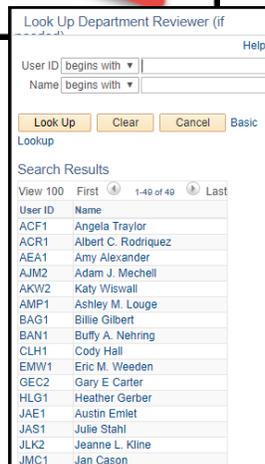
- After clicking the *Save* button, this message will appear. Click *OK*.



- 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.



- 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.





Supplier Approval

Department Reviewer (if needed)

**Supplier Approval Process**

Approval Status: Initiated

Requisitions

Not Routed: Billy Bear, Supplier Requestor

Skipped: No approvers found, Supplier Reviewer

Not Routed: Multiple Approvers, Supplier Requisition Approvers

Save | Return to Search | Previous in List | Next in List | Add | Update/Display

- 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*.

**Supplier Approval Process**

Approval Status: Pending

Vouchers

Self Approved: Billy Bear, Supplier Requestor, 04/10/18 - 11:27 AM

Skipped: No approvers found, Supplier Reviewer

Pending: Multiple Approvers, Supplier Voucher Approvers

Comments

File | Message | Adobe PDF

Ignore | Delete | Reply | Reply All | Forward | Meeting | More

Junk | Delete | Reply | Reply All | Forward | Meeting | More

Deletes/Lockouts | To Manager | Done | Create New | Move

Reply & Delete

You made changes to another copy of this item. This is the most recent version. Click here to see the other versions.

From: Peter\_Able@baylor.edu  
To: Alexander, Amy  
Cc:  
Subject: Supplier ID 65811 has been approved

Supplier Billy Bear's Burgers approved and is now available for processing on vouchers and requisitions.

- 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.



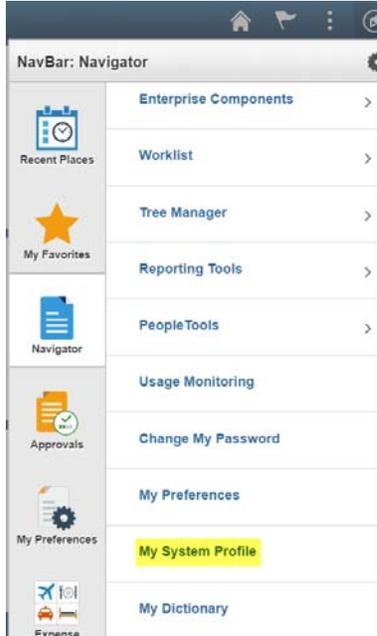
**Note:**

- 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.



## How to Set A Temporary Delegate/Proxy/Approver

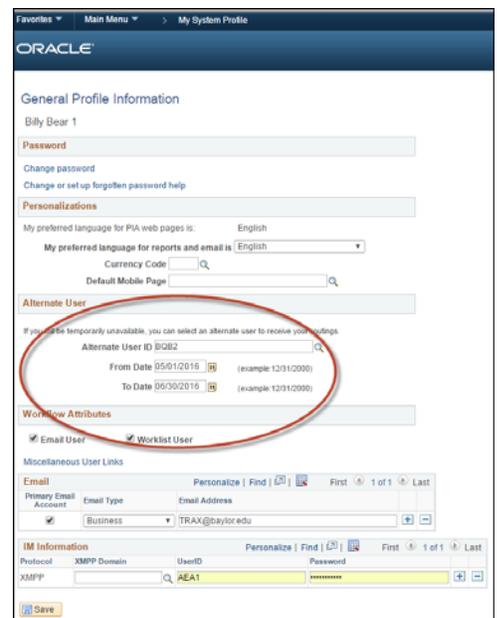


The instructions shown here are designed to help approvers set up a temporary delegate (i.e. approver, proxy) in TRAX/PeopleSoft if you are going to be out of the office for an extended time.

- Log into TRAX/PeopleSoft.
- Select the NavBar icon, followed by Navigator, then My System Profile
- In the Alternate User section, search for the person you want to set as the temporary approver using the magnifying glass. Set the From and To dates. Click the Save button at the bottom of the screen when finished.

Be sure to work any pending items in your Worklist. This process WILL re-route any new transactions, but does not re-route any existing transactions that may already be in your Worklist.

NOTE: The alternate approver you choose MUST have the required roles, access to the department or project, and must have attended training before they can be designated as an approver.





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## Notes: