

SPECIAL
DATES OF
INTEREST:

- 10/7
TRAX Executive
Training
- 10/13—10/16
TRAX Training
(Courses 1-6)
- 11/10—11/13
TRAX Training
(Courses 1-5)
- 11/17
BCR Training
(Course 6)
- 11/18
TRAX Executive
Training

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MONTHLY NEWSLETTER

OCTOBER, 2009

Departmental Adjustment Tips

Here are a few tips that should help to decrease the processing time for your Departmental Adjustments:

- Make sure all lines have been approved. It is the responsibility of the person creating the DA to make sure that all lines have been approved by the appropriate people. The Controller's Office does not receive an email notifying them that the DA is available to be posted until both lines have been approved. Therefore, the DA will not be processed, or even looked at, until all lines have been approved.
- Send appropriate backup as soon as you create the DA. The best way to send backup is to scan and email it to Departmental_Adjustments@baylor.edu. Appropriate backup could be a printout from TRAX, circling the posted charges (for recodes) or perhaps an invoice for services rendered (if you are charging another department on campus).
- If you have multiple items to recode, you can combine those unrelated charges on one DA. It is an inefficient use of your time, as well as Accounting's time, to process multiple DA's when those items could be combined on one form.
- Remember that each DA costs the university approximately \$50 in time and labor to process. Please ensure that the transactions you submit are for a minimum of \$50. If you have a DA to submit for less than \$50, it is a good idea to hold on to it until you can combine it with another recode (see above).
- Always ensure that budget funds are available PRIOR to submitting a Departmental Adjustment.
- Pay close attention to the bi-monthly P-Card email reminders advising deadlines to review and make changes to transactions on PaymentNet. This will save unnecessary DA's, which are costly to the university.

Everyone will benefit as time will be saved and DAs will be processed more quickly if you follow these simple tips. If you have any questions, comments, or concerns regarding Departmental Adjustments, please contact [Suzanne Weems@baylor.edu](mailto:Suzanne_Weems@baylor.edu) in the Controller's Office.

Purchasing Tips

Here are a few helpful tips from Procurement Services:

- Remember to seek competitive bids from at least three different vendors when making purchases that are greater than \$5000.
- After deciding on a vendor, make sure you enter, budget check, and approve the requisition. Do NOT wait and enter the requisition after you have received an invoice. This is a violation of Baylor's Purchasing Policy.
- For purchases less than \$5000, remember that the P-Card is the most cost-effective way of making purchases on behalf of Baylor. The voucher should only be used when the purchase is not P-Card eligible.

It is to everyone's advantage to follow these simple tips. Doing so ensures that we are being good stewards of Baylor's resources.

TRAX (PeopleSoft) Monthly Newsletter

Need Help?

TRAX Hotline
710.8704

www.baylor.edu/traxhelp

trax@baylor.edu

Questions
Self-Service Help ▶▶▶
Answers

VPN

If you need to work from home, please remember you need to install VPN on your personal computer or laptop at home. VPN is a secure way to access applications such as TRAX, Banner, BearQuest, and Khalix from off-campus. To install this application, please refer to the instructions found in the "Navigation" section of your TRAX notebook or by visiting: www.baylor.edu/its/vpn. Once installed, be sure to test VPN to ensure it is working properly. If you experience any issues, report them to the HELP line at x4357.

If you have additional questions regarding VPN, please contact Amy Alexander at x8705 or via email at Amy_E_Alexander@baylor.edu.

TRAXHelp

Not sure who to contact about a particular charge that shows up on your Detail Report? The [TRAXHelp](http://www.baylor.edu/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](#).

Additionally, you can contact the TRAX hotline at x8704. The TRAX hotline is available Monday through Friday, 8-5.

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](http://www.baylor.edu/traxhelp) website and follow the instructions there.

TRAX Training

TRAX training classes are scheduled through the end of November. A list of [TRAX classes](#) is now available on the [TRAXHelp](http://www.baylor.edu/traxhelp) website. Spring semester classes will be forthcoming. 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.