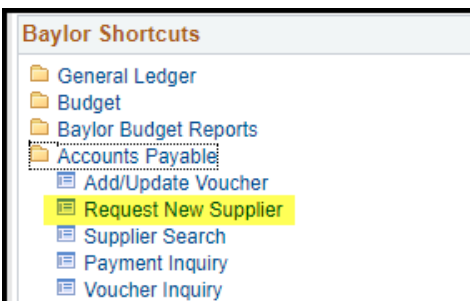


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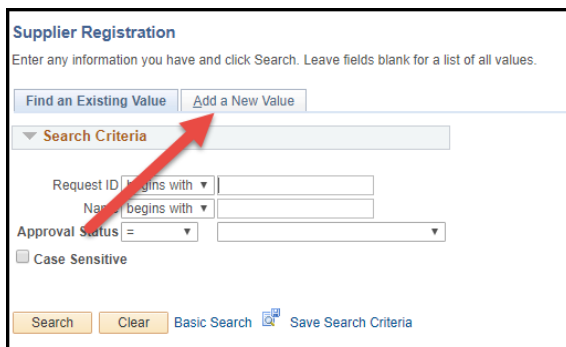
Baylor New Supplier Request

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

A screenshot of the 'Supplier Registration' form. The form has a title 'Supplier Registration' and a subtitle 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two buttons at the top: 'Find an Existing Value' and 'Add a New Value'. Below these is a 'Search Criteria' section with a dropdown arrow. Under 'Search Criteria', there are three input fields: 'Request ID begins with', 'Name begins with', and 'Approval Status'. There is also a checkbox for 'Case Sensitive'. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. A red arrow points from the 'Add a New Value' button to the 'Request ID begins with' field.

- 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.

Oracle Request New Supplier page. Breadcrumb: Favorites > Main Menu > Baylor Shortcuts > Accounts Payable > Request New Supplier. Tabs: Instructions, Request Form. A red arrow points to the Request Form tab. Text: Please Note: Inquiries for supplier requests for requisitions should be directed to the Procurement Services department, all others should be directed to the Accounts Payable department. Buttons: Save, Add, Update/Display.

Request Form tab. ID: 14. *Type of Entity dropdown menu is open with options: Business, Individual, Employee, Student. Business is selected.

- 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.

Request Form tab. ID: NEXT. *Type of Entity: Business. Profile section: Foreign Entity, ACH (Direct Deposit) Enabled, ACH (Direct Deposit) Form, *Name, URL, *Purpose, *Tax Classification, *Provision, *Provision Details. Contact Information: *Name, Phone, *Email, Fax, *Address Line 1-3, *City, *State, *Zip, *Country. Attachments section with a table for Description, Attach, and View.

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.

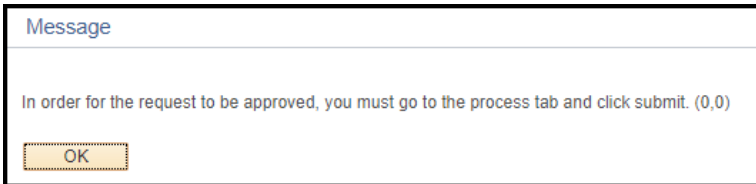
Contact Information

- 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.

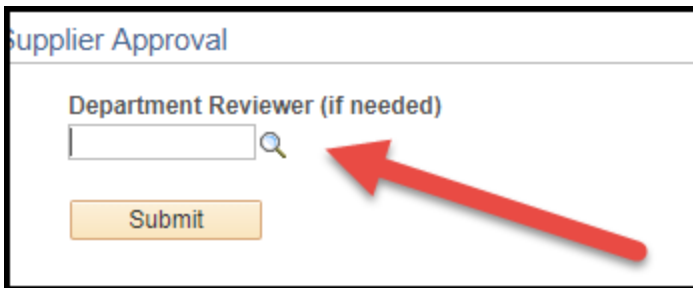
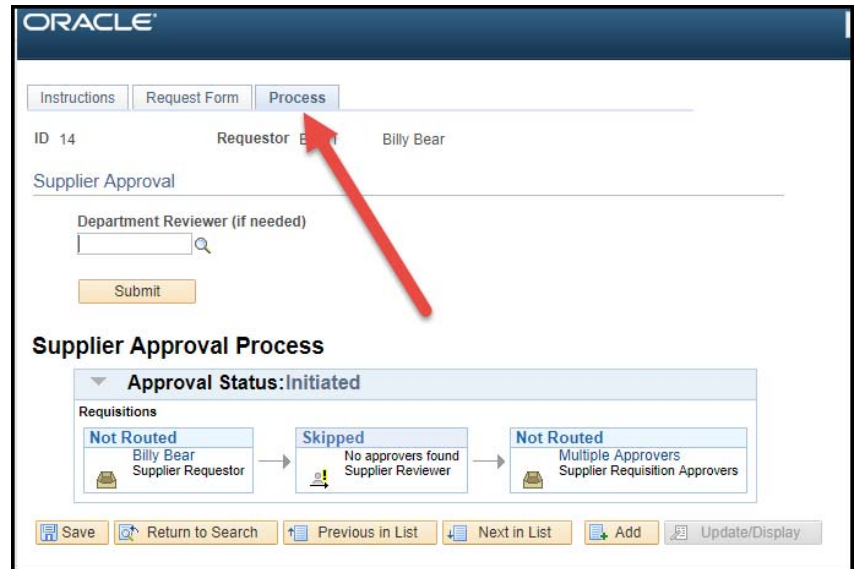


- Click the *Save* button when complete.

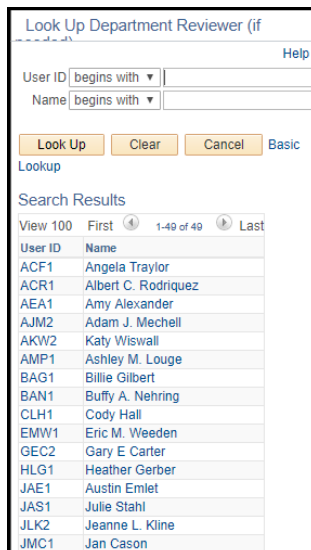


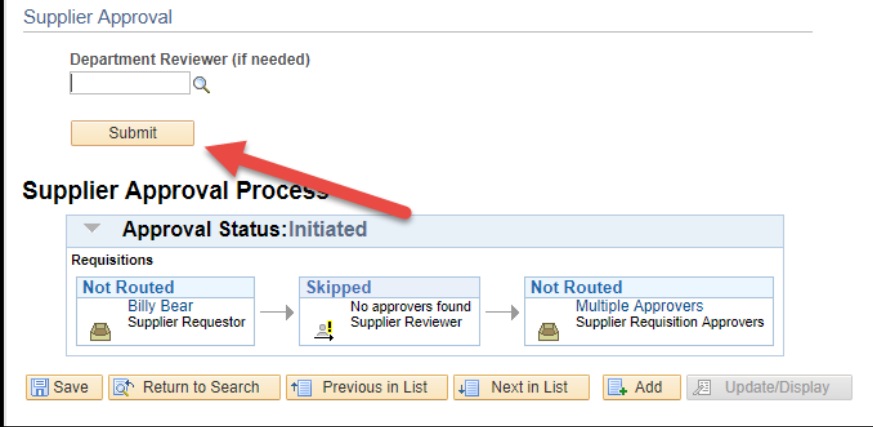
- After clicking the *Save* button, this message will appear. Click *OK*.

- 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.



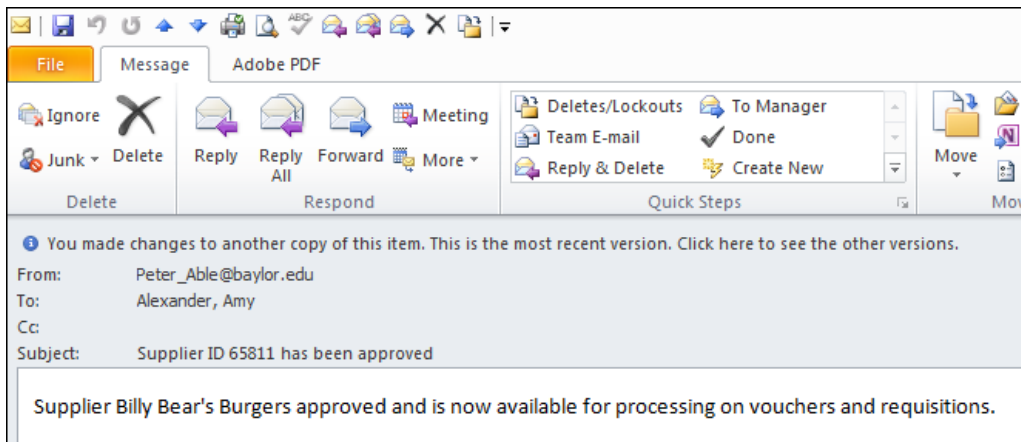
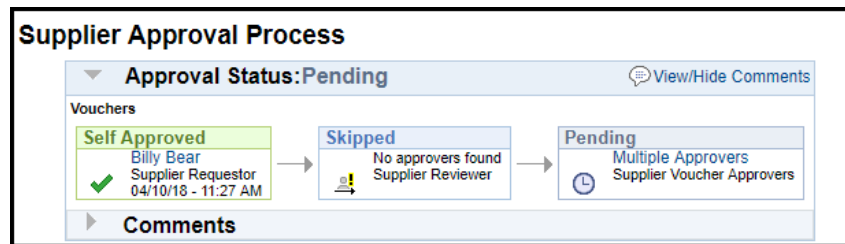
- Optional: If your department has an internal process that requires a secondary reviewer, use the magnifying glass to select the appropriate budget manager. Only those individuals that have been designated as a Key Budget Contact will appear. If your department does NOT require this secondary review,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





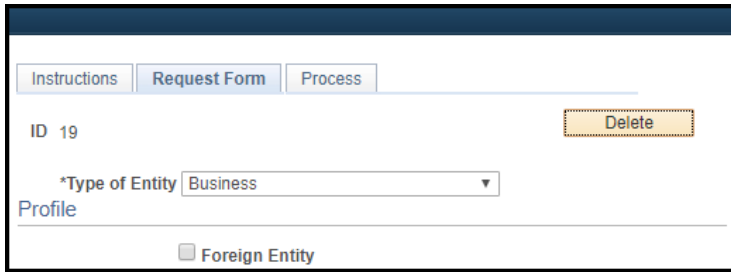
➤ When you are ready for your request to be reviewed, click *Submit* to send it for processing.

➤ 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.

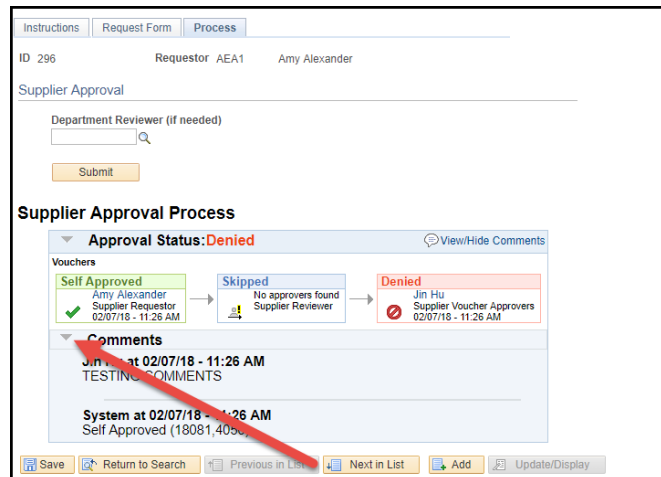
Note:



The screenshot shows a web interface with three tabs: 'Instructions', 'Request Form', and 'Process'. The 'Request Form' tab is active. It displays 'ID 19' and a 'Delete' button. Below this, there is a dropdown menu for '*Type of Entity' set to 'Business'. A 'Profile' section is partially visible, and a 'Foreign Entity' checkbox is at the bottom.

➤ 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.



The screenshot shows the 'Supplier Approval Process' for request ID 296. The 'Process' tab is active. It displays 'Requestor AEA1' and 'Requestor Amy Alexander'. Below this is a 'Supplier Approval' section with a 'Department Reviewer (if needed)' field and a 'Submit' button. The 'Approval Status' is 'Denied'. A flowchart shows the process: 'Self Approved' (Amy Alexander, 02/07/18 - 11:26 AM) → 'Skipped' (No approvers found, Supplier Reviewer) → 'Denied' (Jim Hu, Supplier Voucher Approver, 02/07/18 - 11:26 AM). A 'Comments' section is expanded, showing a comment from 'Jim Hu' at 02/07/18 - 11:26 AM with the text 'TESTING COMMENTS'. A red arrow points to the 'Comments' section. At the bottom, there are navigation buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Add', and 'Update/Display'.