

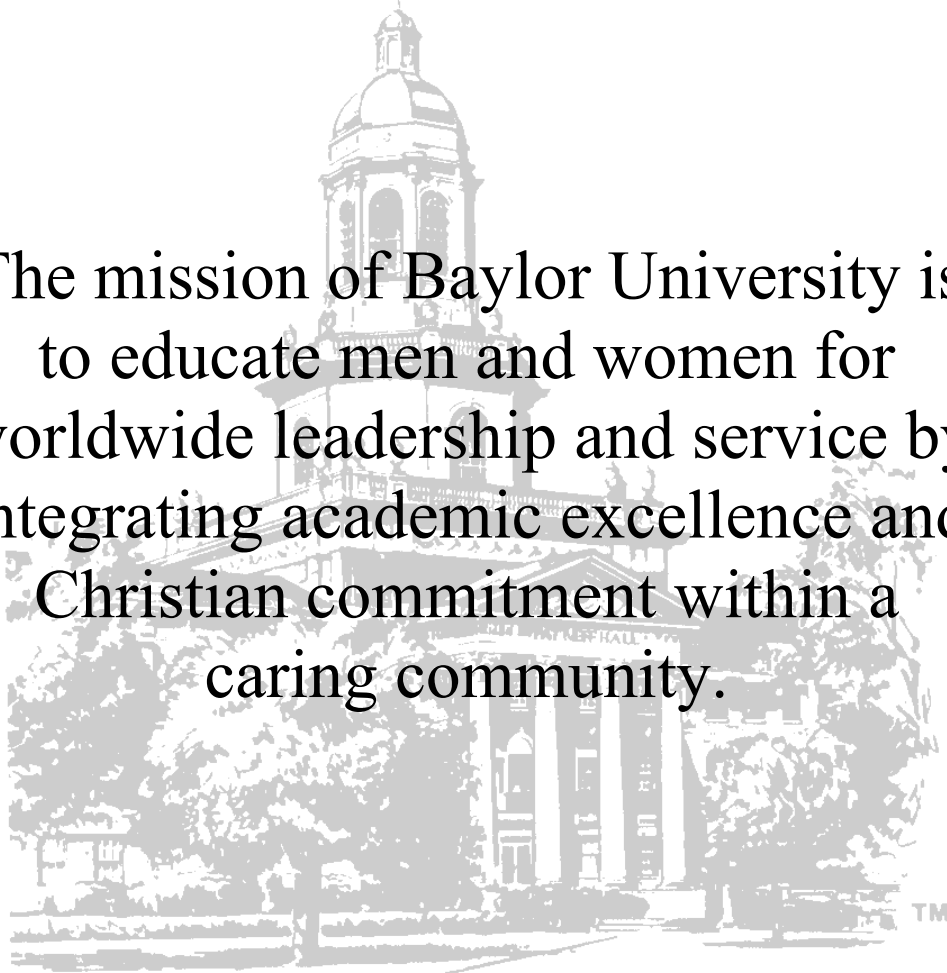


BAYLOR UNIVERSITY
FINANCIAL TRANSACTION SYSTEM

TRAX End User Manual
PeopleSoft Financials 9.2

Help Desk x4357
TRAX Support x8704





The mission of Baylor University is
to educate men and women for
worldwide leadership and service by
integrating academic excellence and
Christian commitment within a
caring community.

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Navigating to Pages in TRAX

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General Information

It is a violation of Baylor University policy for a user to give anyone their TRAX operator ID and password for any reason. Please send e-mail to TRAX@baylor.edu to change the permissions for an operator.

Where to go for Help

The TRAX web site can be found at: <http://www.baylor.edu/traxhelp>.

Assistance is also available at the Help Desk, x4357, the TRAX Support line at x8704 or send e-mail to TRAX@baylor.edu

Acknowledgements:

- PeopleSoft Higher Education Users Group Training Issues Mailing List
- PeopleSoft® Documentation
- PeopleSoft® OnDemand Training
- Indiana University
- University of South Florida
- University of Maryland Baltimore
- Georgetown University
- University of Minnesota
- Northwestern University



Signing into PeopleSoft 9.2



- Open Browser
(Google Chrome, Internet Explorer, Firefox, Safari, etc)

Address

- In the *Address* field, type:
www.baylor.edu/trax
- Press *Enter*



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User ID
BQB1

Password

- Enter the *User Id*
- Enter the *Password*

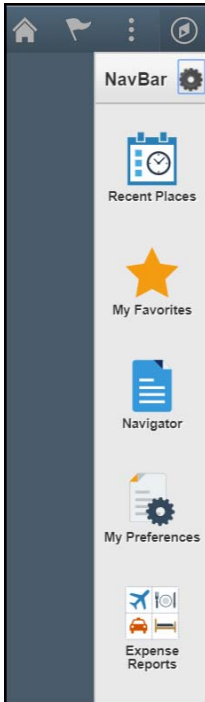
Sign In

- Click the *Sign In* button





- Click the desired tile on the *Baylor Homepage*



OR

- Click the *NavBar* icon to access the *Navigator* and full menu

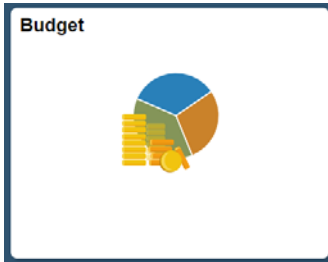
- Press the *F11* key on the keyboard to shrink the browser toolbar
- Right click the toolbar and select *Auto-Hide* to hide the toolbar completely. “Hover” the mouse at the top of the screen to temporarily see the toolbar again. (This will only need to be done once.)

Note: The system logs out users who have been inactive for forty-five minutes.



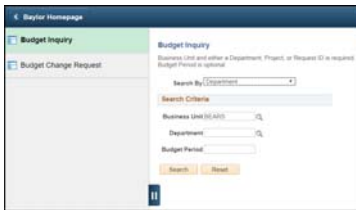
Budget Inquiry

The Budget Inquiry displays a "bird's-eye view" of a Department ID or Project ID. (See Budget section)



➤ Budget

➤ Budget Inquiry



Budget Inquiry

Business Unit and either a Department, Project, or Request ID is required.
Budget Period is optional.

Search By

Search Criteria

Business Unit

Department

Budget Period

➤ Select the *Department* radio button and enter your department number or (optional) click *Look up Department* (the magnifying glass) to see a list of available departments.



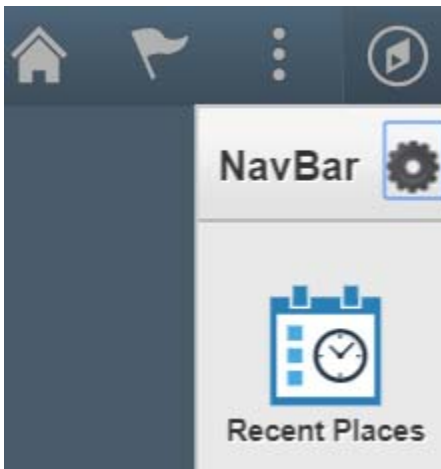
PeopleSoft Financials 9.2

Budget Period 2015

- Enter the *Budget Period*
This will be the fiscal year (ex: **2019**) or **ALLPER** (All Periods) if the fiscal year of the department is different from that of Baylor's

Search

- Click *Search*

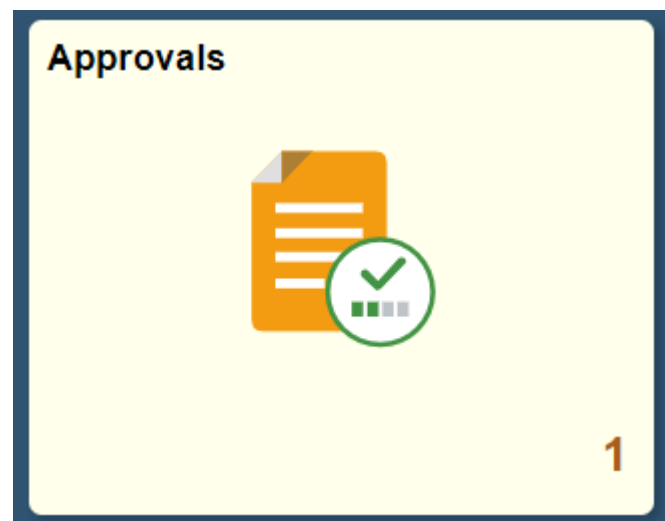


Recent Places

The *Recent Places* feature is located in the *NavBar* menu. It shows the last 5 pages you have visited.

Approvals

If you are an approver, you will have a tile that shows items requiring attention.

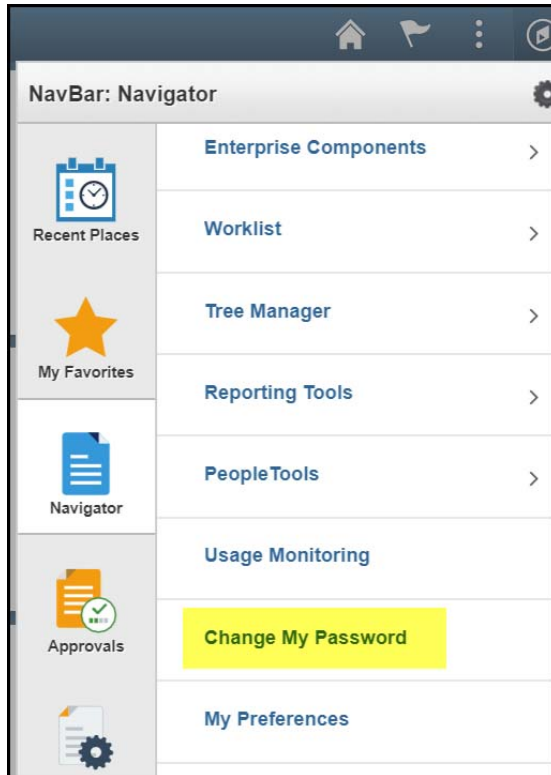




Changing The Password

- Click on the NavBar followed by *Change My Password*

Note: If you forget your password, you can also reset it by going to bearid.baylor.edu and clicking on the *PeopleSoft* option to reset it there.



Change Password

User ID: BQB1
Description: Billy Bear

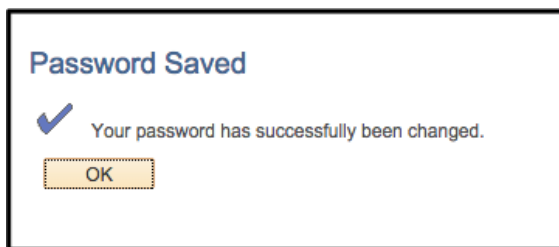
*Current Password:

*New Password:

*Confirm Password:



- 'Current Password: ➤ Enter the old *Password*
- 'New Password: ➤ Enter the new *Password*
- 'Confirm Password: ➤ Re-enter the new *Password*
- Change Password ➤ Click *Change Password*



Passwords must:

- Have at least eight characters
- Contain at least one non-letter
- Contain at least one special character
- Be changed once a every ninety days

Passwords must NOT:

- Be the same as the Bear_ID
- Be the same as the PeopleSoft User Id
- Be a word that can be found in a dictionary
- Be a password the user has used previously on TRAX

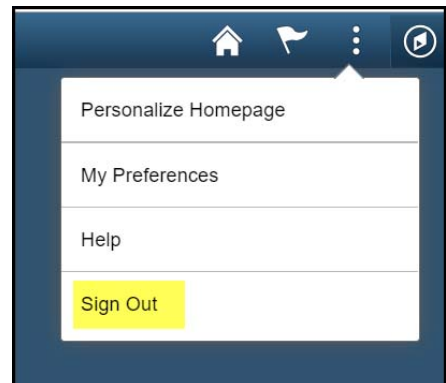
See the [ITS Password Policies Web page](#) for more details:

- Go to <http://its.baylor.edu/>
- Click on [Policies](#)
- Click on [BearID, PIN Guidelines](#)
- Click on [Password Policies](#)



Signing out

Note: Always *Sign Out*, do not just close the browser or go to another site



General Tips:

- Do not use the *Back* button on the Internet Browser. This may work on some pages some of the time, but in other situations, it can cause data loss.
- Press the *F11* key on the keyboard to shrink the toolbar on the browser and give more room for data. (Right click the toolbar and select *Auto-Hide* to hide the toolbar completely. “Hover” the mouse over it, to see it again. This only needs to be done once.)
- Turn off Popup blockers prior to logging in to PeopleSoft 9.2. They sometimes block screens within PeopleSoft that you will need to see.
- Having multiple windows open confuses the system and can cause the user ID to log out erroneously. Do not have multiple windows open unless all windows are used every few minutes.



PeopleSoft Favorite Pages

Create a list of the most used pages in PeopleSoft. For instance, save the Budget Inquiry page to the favorites list. Navigate to the page

Budget Inquiry
Business Unit and either a Department, Project, or Request ID
Budget Period is optional.

Search By

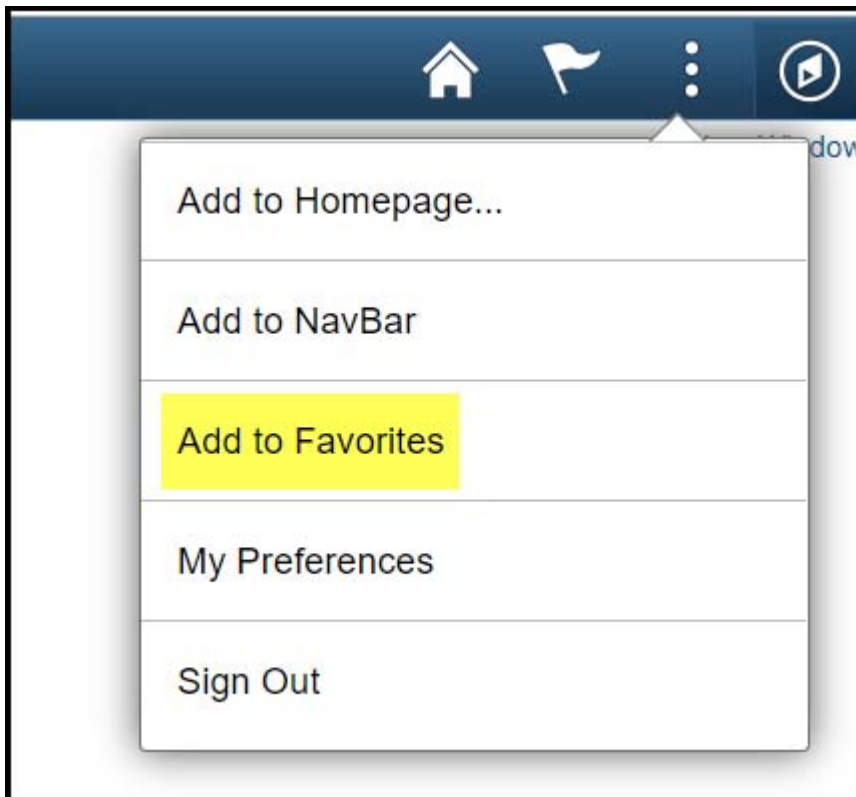
Search Criteria

Business Unit

Department

Budget Period

- Budget
- Budget Inquiry



- Click the *Actions List* icon

- Click the *Add to Favorites* link



PeopleSoft Financials 9.2

Add to Favorites

Please Enter a Unique Description for this Favorite

*Description Budget Inquiry

OK Cancel

- (Optional) Change the *Description*

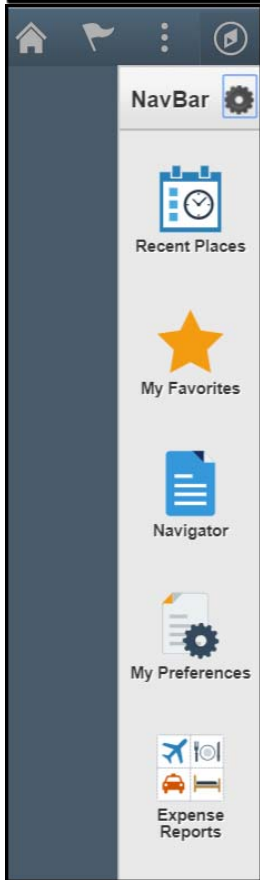
OK

- Click *OK*

The favorite has been saved.

OK

- Click *OK*



- (Optional) Verify the page was added to the favorites by clicking on the *NavBar* followed by *My Favorites*



Running TRAX from Home

To provide additional security, TRAX requires that users using other Internet Service providers create a Virtual Private network on their home computer. A PC must run Windows 7 in order to be able to set up a VPN (Virtual Private Network). MAC OS will work, as well.

- Open Internet Explorer to www.baylor.edu/its/vpn
 - Enter the *Bear ID* and *Password*
 - Download and print the *detailed* installation instructions
 - Follow the directions to install the software

VPN also requires the use of two-factor authentication. See the Baylor Two-Factor page for instructions on enrolling your phone for authentication.