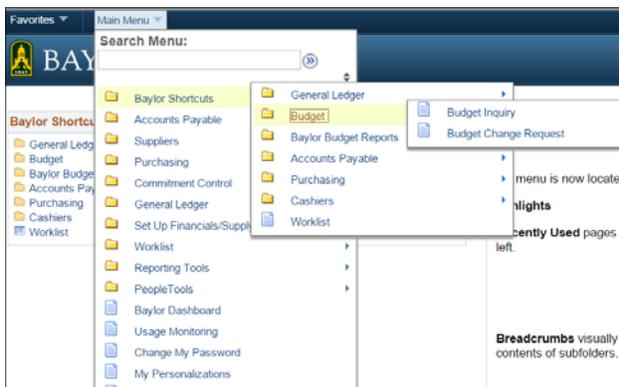


TRAX - PeopleSoft Financials

What's New in Version 9.2?

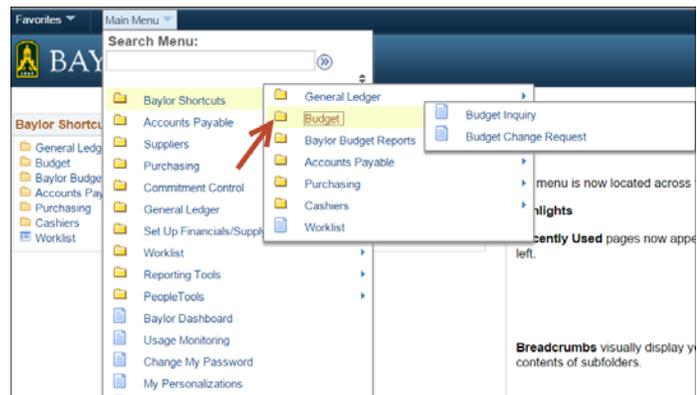
The upgraded version of our PeopleSoft Finance System will offer exciting new features and functionality. This snapshot will help you become familiar with some of the basic capabilities and concepts.

Cascading menus



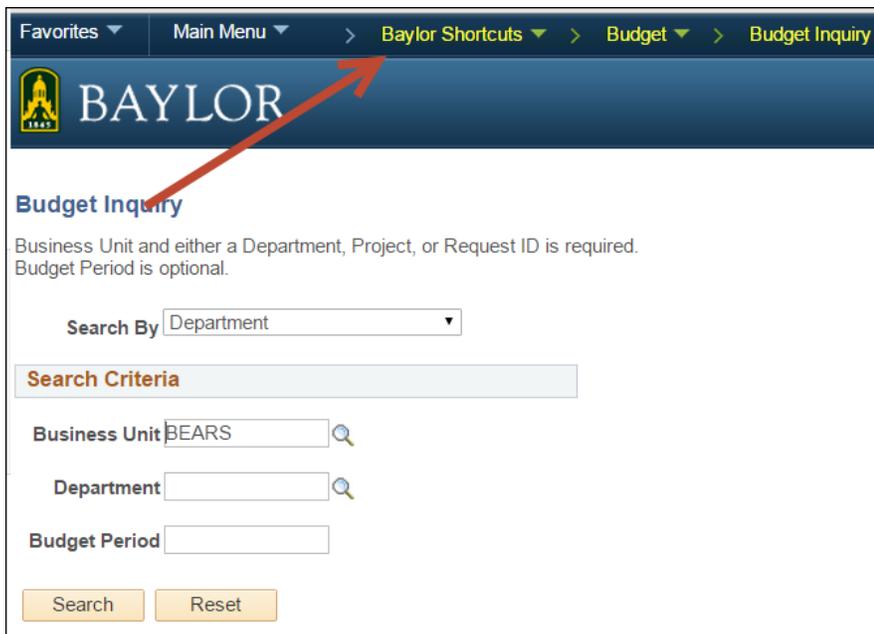
➤ A cascading menu at the top of the screen replaces the left navigation menu and expands as you make selections to allow you to quickly access links that are several layers down in the navigation.

➤ You can click the folder icon in the cascading menu to view all of the folder contents in the main display window.



Folder Name Changes

In some cases, the folder names have changed, but they should make sense. *General Ledger* is the old *Accounting* folder (where you can find Chartfield Values and the DA form), *Accounts Payable* is the old *Voucher* folder (where you can find all things voucher related), *Cashiers* is where you can find Departmental Receipts, and *Purchasing* is where you can find everything related to Req's and PO's.



Breadcrumb Navigation

Breadcrumbs replace the left-hand menu pagelet navigation and are now located at the top of the screen. These indicate where you are in the menu navigation. To navigate to other pages, simply click to open the cascading menu.

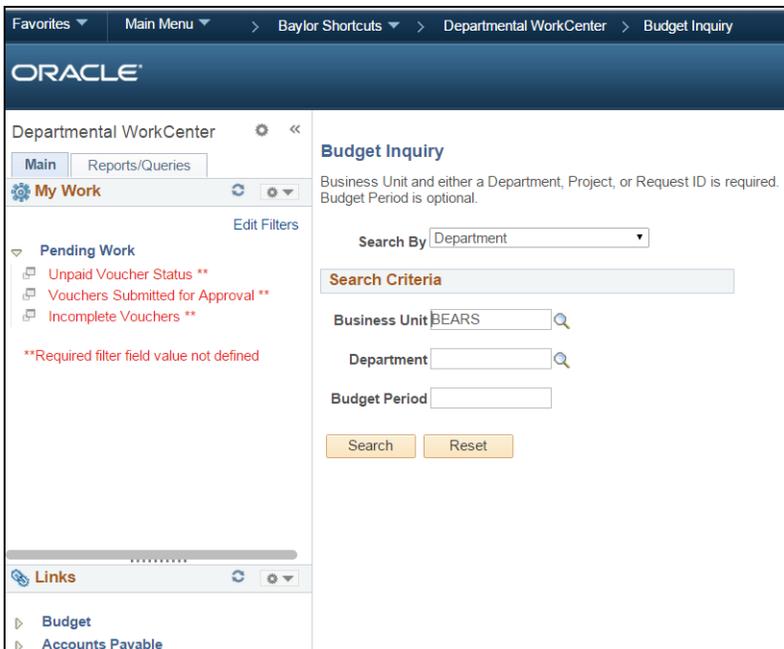
Recently Used

The Recently Used feature is located in the Favorites drop-down menu. It shows the last 5 functionalities you have visited.



Worklist

A central area that shows all items requiring attention. Pay close attention to your Worklist. Some components will send a system generated email when an item requires your attention (ex: Req approval), while others will not (ex: Voucher approval). Your Worklist, however, will always contain an accurate list of items that require your attention.



Workcenters

Workcenters help frequent users dramatically boost productivity by consolidating user tasks, exceptions, alerts, links, reports, and queries into a single, secure, role-based, command center that can be personalized. Workcenters primarily help the end-user by reducing navigation time and helping you get down to business.

Chartfield Security

We are transitioning to PeopleSoft's delivered Chartfield security as a part of this upgrade. This change is mostly "behind the scenes" and you should not see a tremendous difference because of this change. The change is significant, though, because it is the backbone of securing our financial transactions within the system.

Workflow

We are introducing a new workflow system for AP Vouchers, Requisitions, and Journal Vouchers. The workflows will enable transactions entered by end-users to be routed electronically through the system to pre-defined approvers.



Fund Code Changes

All transactions now require the entry of a Fund code. After entering your department ID, be sure to click the magnifying glass next to Fund code to enter it, as well. All departments have a corresponding fund code so the only available choice will be the fund code that goes with your department ID.

The screenshot shows a 'Distribution Lines' table with the following data:

Copy Down	Line	Merchandise Amt	Quantity	Account	PC Bus Unit	Project	Dept	Fund	Program
<input type="checkbox"/>	1	100.00		9370			0281180	10111	

The 'Fund' column value '10111' is circled in red.

Project Changes

All grant funded expenses have a new entry process (similar to the fund code changes mentioned above). Order is everything when it comes to your grant expenses. Always enter your **PC Business Unit** first (always **BEARS**), followed by your **Project ID**. From there, similar to the fund code change, you will select the **department, fund, and activity** that relates to your Project number.

The screenshot shows a 'Distribution Lines' table with the following data:

Copy Down	Line	Merchandise Amt	Quantity	Account	PC Bus Unit	Project	Dept	Fund	Program	Activity
<input type="checkbox"/>	1	100.00		9370	BEARS	30240107	7011501	7A115		SP

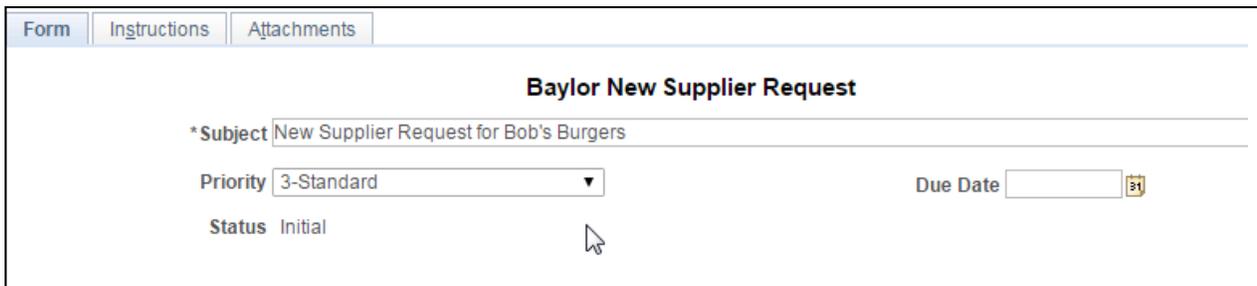
Supplier Registration

The New Vendor* code of 09999 is no longer available for use and has been replaced with an online New Supplier Request in the TRAX system. Users should begin the process of requesting a new supplier at the beginning of the purchase cycle, instead of the end. This process is intended for regular suppliers, foreign suppliers, employees or students.



Once you have ensured that the supplier does not already exist in our system, proceed with the New Supplier Request by navigating to Accounts Payable > Baylor New Supplier Request.

Complete the form, attach the relevant documents, and submit for review and approval. 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.

A screenshot of a web form titled 'Baylor New Supplier Request'. The form has three tabs: 'Form', 'Instructions', and 'Attachments'. The 'Form' tab is active. The form contains the following fields: '*Subject' with the value 'New Supplier Request for Bob's Burgers', 'Priority' set to '3-Standard' in a dropdown menu, 'Due Date' with an empty date field and a calendar icon, and 'Status' set to 'Initial'. A mouse cursor is pointing at the 'Status' field.

*Note – the term “vendor” has changed throughout the system to “supplier”.

For more detailed, step-by-step instructions, please visit our website at www.baylor.edu/traxhelp and click on the “Getting Started” link.