ADD OR DELETE PROJECT TRANSACTION CONTROLS

"LIMIT TO TRANSACTION CONTROLS" BOX IS NOT CHECKED

SCOPE

Adjusting project transaction control where the transaction control form "Limit to Transaction Controls" box is *not* checked.

- All projects except fabrication projects or capital equipment award projects.
- Projects set up with all project templates except SP_T_FAB and SP_T_CAP_EQUIP.

ADD A TRANSACTION CONTROL TO MAKE AN EXP TYPE UNAVAILABLE FOR CHARGING

PROCEDURE

Before adjusting transaction controls, run the RM3 180 PTA configuration report for a listing of project transaction controls. Make sure you know what transactions controls are on the project before you make changes!

1. From the SU_GA_Research_Accountant or SU_GA_Research_Associate responsibilities select: Projects >(project number) >Find>Open>Transaction Controls

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- 2. We add transaction controls to the end of the form.
 - a. To go to the end of the form: View(tool bar) >Record>Last>Continue to End
 - b. The first field in the last row should be highlighted. (If not select any field in the first row of the transaction control table by clicking on it).

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3. Go to the "New" icon in the tool bar (icon with the green plus sign). Click on the icon to add a new empty row for your transaction control.

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4. Tab your cursor to the "Type" field in the empty row and type in the number of the expenditure type that requires a transaction control. <Tab> out of the "type" field. You should see the expenditure type category appear.

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- 5. You are finished. Review the following:
 - 1. The "Chargeable" checkbox should be blank.
 - 2. The "Billable" field should display "No".
 - 3. The "Effective Date" "From" date should be the award start date or pre-award start date. The "To" date should be blank. (Use the horizontal scroll bar to see the "Effective Date" Fields.)

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- 4. All other fields should be blank.
- 6. Save your work.
- 7. File the documentation supporting the adjustment in the sponsor award folder.

DELETE A TRANSACTION CONTROL TO MAKE AN EXP TYPE AVAILABLE FOR CHARGING

PROCEDURE

Before adjusting transaction controls, run the RM3 180 PTA configuration report for a listing of project transaction controls. Make sure you know what transactions controls are on the project before you make changes!

1. From the SU_GA_Research_Accountant or SU_GA_Research_Associate responsibilities select: Projects >(project number) >Find>Open>Transaction Controls

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2. Go to the row containing the expenditure type you want to delete. You can scroll down until you find it or you can use "Query By Example" under "View" in the toolbar.

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- 3. Select any field in the row by clicking on it.
- 4. Select the "Delete" icon in the tool bar. (The icon with a red "X" on the right of the tool bar.)

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(We are deleting exp type 53115.)

5. The row with the transaction control you want to delete is deleted.

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(Exp type 53115 has been deleted.)

- 6. Save your work.
- 7. File the documentation supporting the adjustment in the sponsor award folder.