

CORRECTING PROJECT TRANSACTION CONTROLS WHEN AN INCORRECT PROJECT TEMPLATE IS USED

If an incorrect project template is used and the project is not closed and a new one opened the transaction controls on the project may need to be adjusted to agree with the correct template. An Excel spreadsheet CORR_TEMPLATES.XLS on the OSR Desk Procedures page has been created to facilitate this adjustment. The spreadsheet only identifies the expenditure types that need to be added or deleted.

Each tab of the spreadsheet corresponds to a template that was incorrectly applied and documents how to adjust the transaction controls to agree to the correct template. This spreadsheet will allow you to correct the following templates:

SP_T_FED_A21
SP_T_FED_A21_NSTP
SP_T_FED_A21_MJR_PRJ
SP_T_FED_A21_MJR_PRJ_NSTP
SP_T_STATE_LOCAL_NO_A21
SP_T_NON_FED_NO_A21
SP_T_FABRICATION to SP_T_EQUIP_ONLY
SP_T_EQUIP_ONLY to SP_T_FABRICATION

For any changes involving the templates SP_T_FABRICATION, SP_T_EQUIP_ONLY or SP_T_PR_SVC_AGREE other than those documented above, contact RAPC, Jesse Charlton or Lisa Ciabrone. Please provide the project, award, incorrect template used and correct template.

EXAMPLE

Project Template SP_T_FED_A21 was incorrectly applied

In this example we incorrectly applied the SP_T_FED_A21 template to the project. We should have used SP_T_STATE_LOCAL_NO_A21.

1. We select the tab "SP_T_FED_A21 in the spreadsheet CORR_TEMPLATE.XLS. (See table below.)
2. To correct the transaction controls on the project to reflect the correct template we look at column "SP_T_STATE_LOCAL_NO_A21".
3. We have to delete the transaction control for expenditure type 51905. We will add a transaction control for ET 52435 to make the ET non-chargeable.
4. To add or delete transaction controls see *Add or Delete Project Transaction Controls – "Limit to Transaction Controls" box is not checked.*
5. Update the project flexfield with the correct template name.
6. *After the transaction controls have been adjusted. Print the RM3 180 PTA Configuration report and verify the adjustments are correct.*
7. When adjusting transaction controls on projects set up with SP_T_FABRICATION or SP_T_EQUIP_ONLY, refer to the guidance *Add or Delete Project Transaction Controls – "Limit to Transaction Controls" box is checked.*

CORRECTING PROJECT TRANSACTION CONTROLS WHEN THE WRONG TEMPLATE IS USED - *continued*

SP_T_FED_A21 Project Template was incorrectly used (example spreadsheet)

Grayed out = No change necessary

AddTC = Add transaction control to exclude ET from charging

RTC = Remove transaction control from ET to allow charging

Expenditure Types		Change to one of the templates below from project template SP_T_FED_A21				
ET Description	EXP TYPE	SP_T_FED_A21_NSTP	SP_T_FED-A21-MJR_PRJ	SP_T_FED_A21_MJR_PRJ_NSTP	SP_T_STATE_LOCAL_NO_A21	SP_T_NON_FED_NO_A21
RBE DEAN AND ACADEMIC OFFICERS	52310					RTC
FACULTY BONUS	51905				RTC	RTC
PARTICIPANTS COST NSF	52435				AddTC	AddTC