

## ADJUSTING PROJECT TRANSACTION CONTROLS - CAPITAL EQUIPMENT /CAPITAL FABRICATIONS DO NOT VEST WITH STANFORD

The Chart of Accounts uses separate expenditure types to identify capital equipment or capital fabrications as vesting (SU) or not vesting (Non-SU) with Stanford. The project templates **assume** that capital equipment or capital fabrications vest with Stanford. Adjustments to transaction controls need to be made if vesting is not with Stanford. Appendix A documents the transactions controls by template for Stanford and Non-Stanford owned equipment and fabrications.

### PROCEDURE

1. At award/project set-up, the OSR set-up accountant is responsible for noting that capital equipment and/or fabrication vests with the sponsor. (PMO may also request the vesting to be changed.)
2. After the project template has been selected and applied to the project, the set-up accountant modifies the transaction controls on the project to make the SU-owned expenditure types non-chargeable and the Non-SU expenditure types chargeable by referring to the table below.
  - a. For all projects except fabrications and capital equipment award projects, procedures for adding/deleting project transaction controls are at *Add or Delete Project Transaction Controls – “Limit To Transaction Controls” box is not checked*
  - b. For fabrication projects and (capital) equipment award projects, procedures for adding/deleting project transaction controls are at *Add or Delete Project Transaction Controls – “Limit To Transaction Controls” box is checked*
3. After all transaction controls have been adjusted, run the RM3 180 PTA Configuration report to verify the project transaction controls were correctly updated.

### CHANGING VESTING FROM STANFORD (SU) TO NON-STANFORD (NON SU)

Only the capital exp types where the transaction controls change are listed below,

For all capital exp types, see the spreadsheet **TRANSACTION CONTROLS AND CAPITAL EQUIPMENT – STANFORD VESTING (SU Default) and NON-STANFORD VESTING (Non-SU)**.

	If Project Templates:	SP_T_FED% SP_T_STATE%	SP_T_NON_FED_NO_ A21	SP_T_FABRICATIONS	SP_T_EQUIP_ ONLY
EXP TYPE	DESCRIPTION	Federal, State and Local Government Awards	Non- Federal Awards ( excludes State of CA and Local Governments)	Capital Equipment Fabrication	Capital Equipment Award
53110	SU CAP OFFICE FURNITURE		Add TC		
53115	SU CAP SCIENTIFIC TECH EQUIP	Add TC	Add TC		Delete TC
53120	SU CAP COMP EQUIP	Add TC	Add TC		Delete TC
53160	SU CAP OTH EQUIP 5 YR LIFE		Add TC		
53175	SU CAP EQUIP UPGRADE EXPANSION	Add TC	Add TC		Delete TC
53195	SU CAP FAB			Delete TC	
55010	NON SU CAP SCIENTIF TECH EQUIP	Delete TC	Delete TC		Add TCC
55020	NON SU CAP COMP EQUIP	Delete TC	Delete TC		Add TCC
55030	NON SU CAP OFFICE FURNITURE		Delete TC		
55070	NON SU CAP OTH EQUIP 5 YR LIFE		Delete TC		
55080	NON SU CAP EQUIP UPGR EXPANS	Delete TC	Delete TC		Add TCC
55095	NON SU CAP FAB			Add TCC	
58671	INTRA-DEPT SU CAP FABRICATION			Delete TC	
58676	INTRA-DEPT NON-SU CAP FABR			Add TCC	

Note : Add TCC = Adding a TC to SP\_T\_FABRICATIONS/ SP\_T\_EQUIP ONLY makes the ET chargeable.