

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

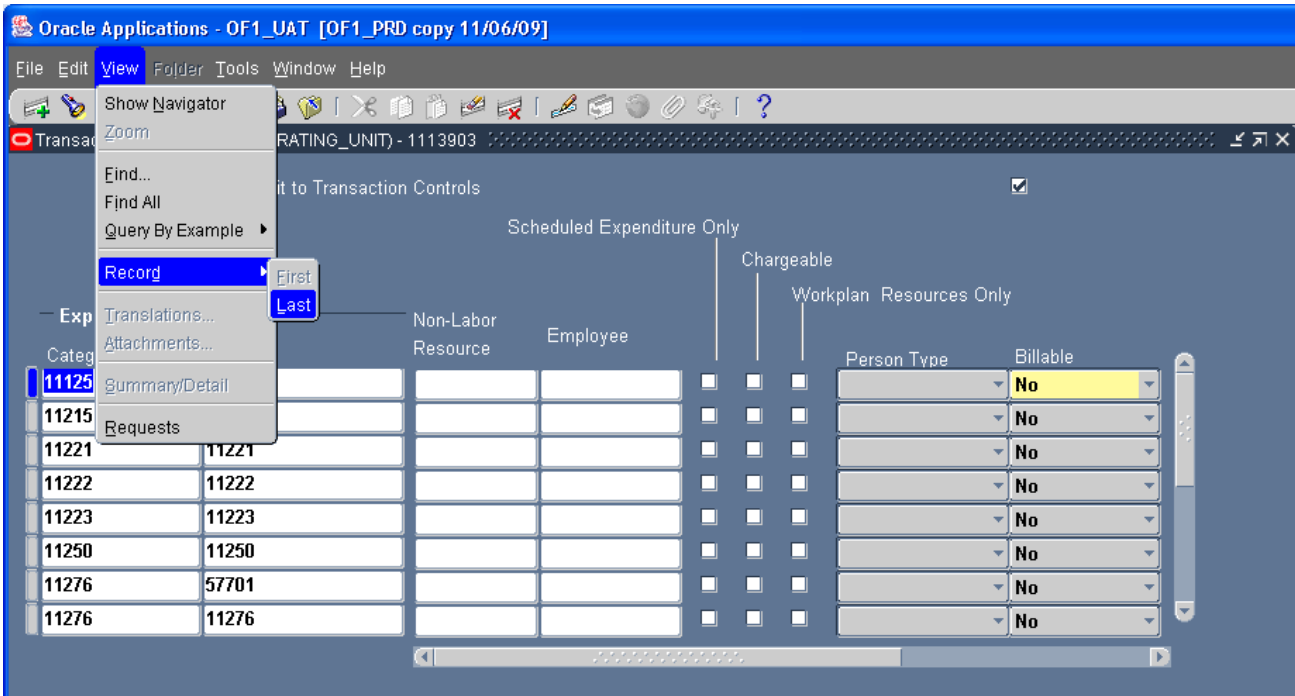
PROCEDURE

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!

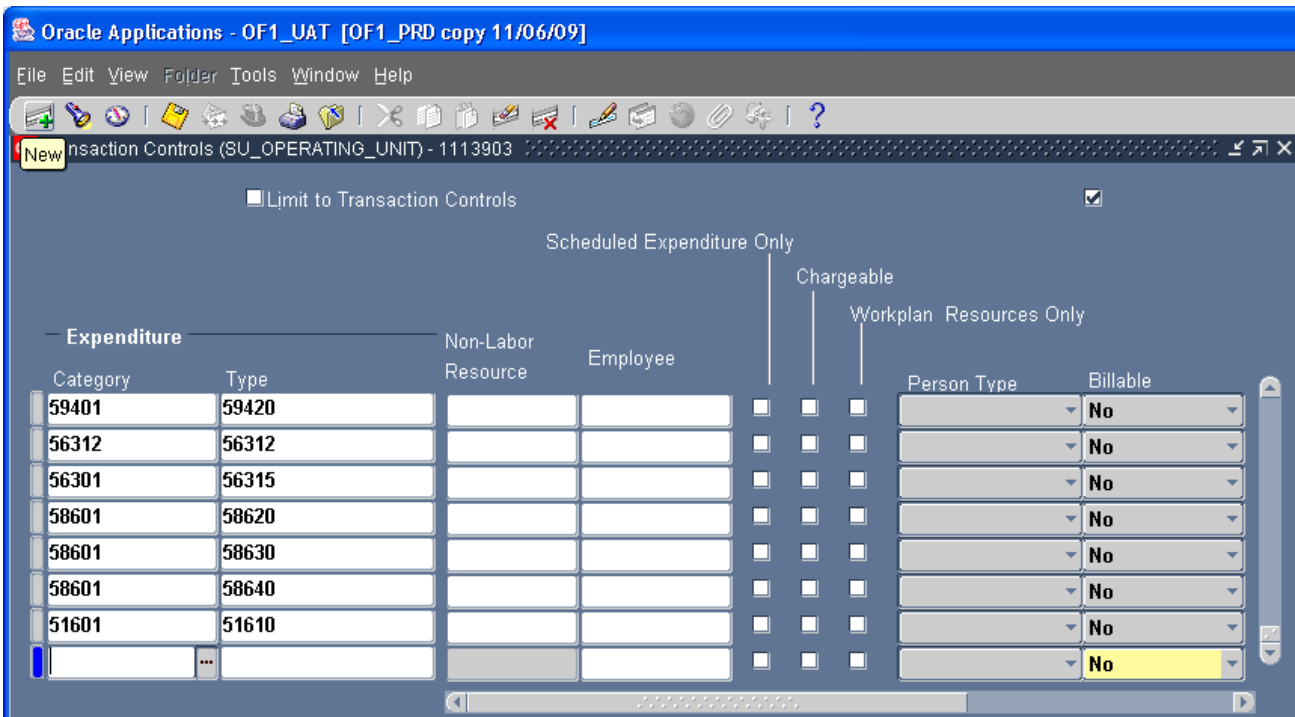
1. From the SU_GA_Research_Accountant or SU_GA_Research_Associate responsibilities select:
Projects >(project number) >Find>Open>Transaction Controls

Expenditure		Non-Labor Resource	Employee	Scheduled Expenditure Only	Chargeable	Workplan Resources Only	Person Type	Billable
Category	Type							
11125	11125			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		No
11215	11215			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		No
11221	11221			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		No
11222	11222			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		No
11223	11223			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		No
11250	11250			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		No
11276	57701			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		No
11276	11276			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		No

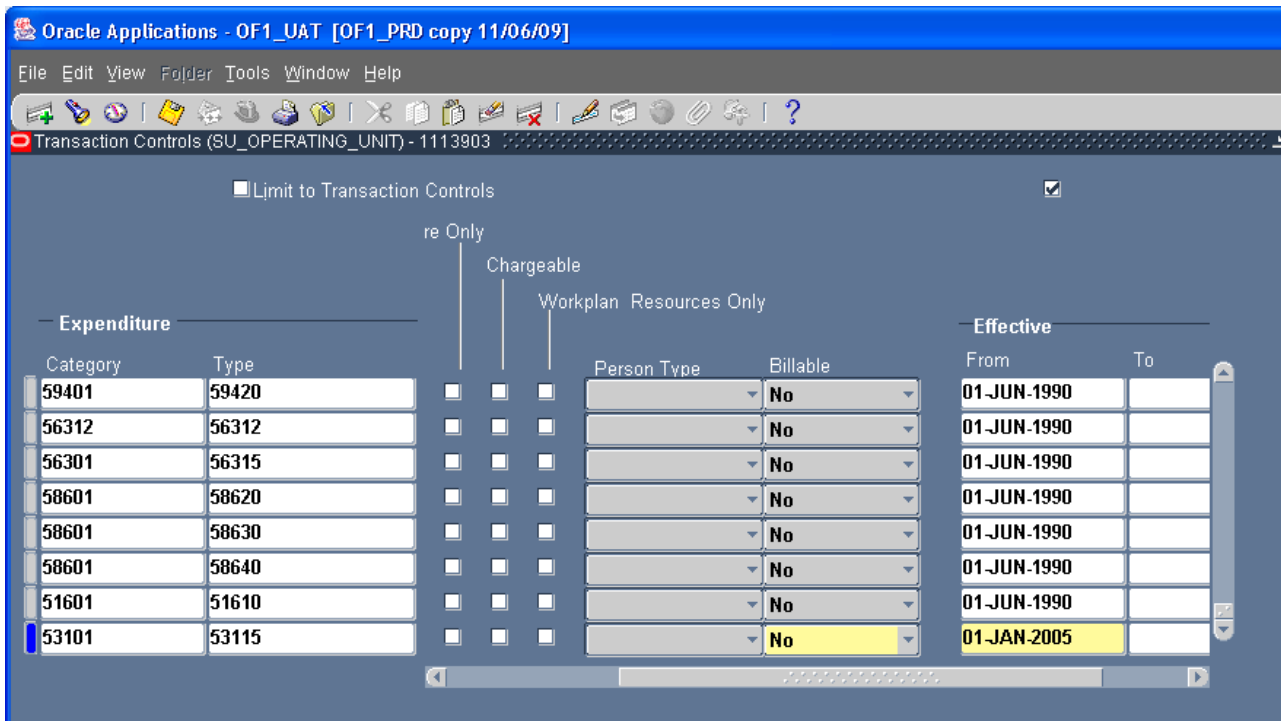
2. We add transaction controls to the end of the form.
 - a. To go to the end of the form: View(tool bar) >Record>Last>Continue to End
 - b. The first field in the last row should be highlighted. (If not select any field in the first row of the transaction control table by clicking on it).



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.



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.



(We added a

Transaction control to block ET 53115.)

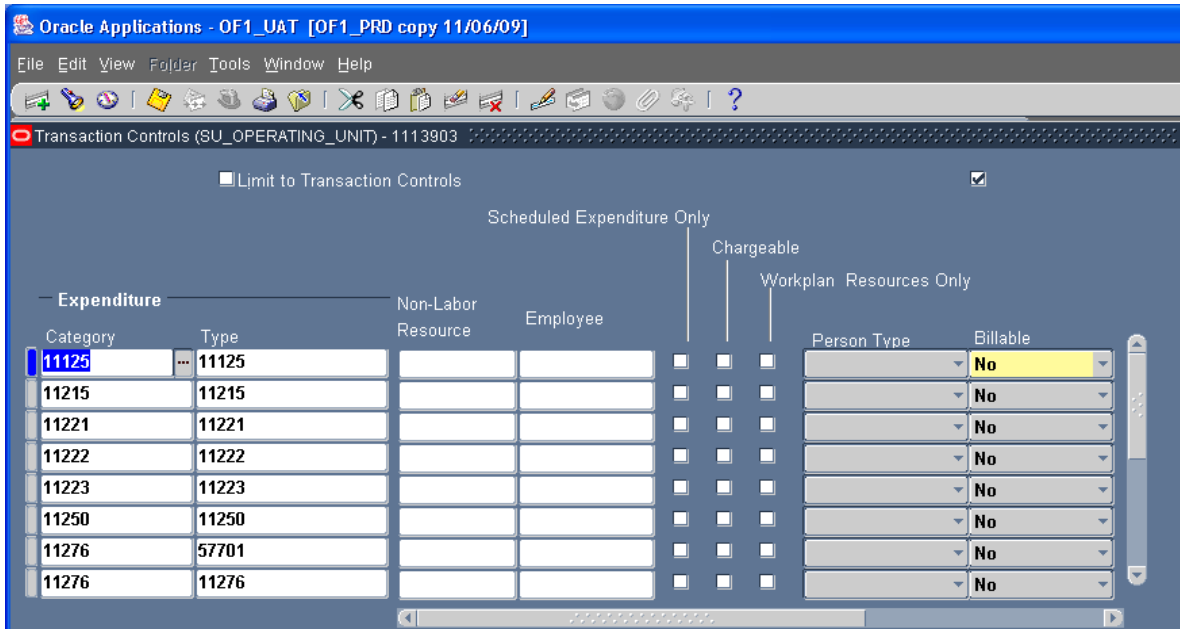
5. You are finished. Review the following:
 1. The "Chargeable" checkbox should be blank.
 2. The "Billable" field should display "No".
 3. The "Effective Date" "From" date should be the award start date or pre-award start date. The "To" date should be blank. (Use the horizontal scroll bar to see the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

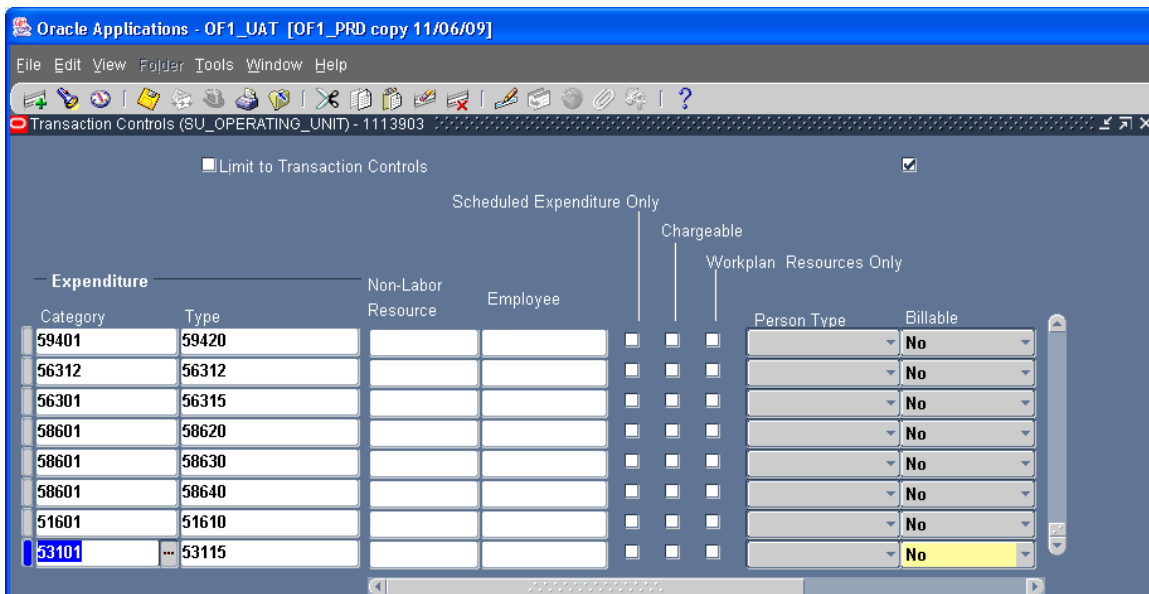
PROCEDURE

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!

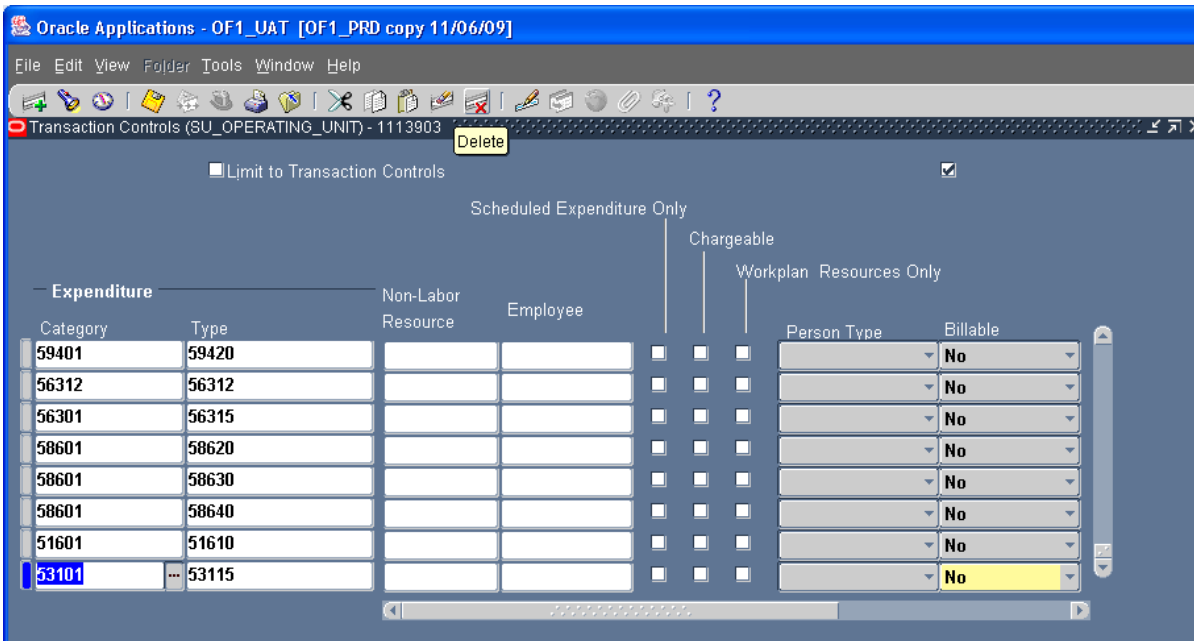
1. From the SU_GA_Research_Accountant or SU_GA_Research_Associate responsibilities select:
Projects >(project number) >Find>Open>Transaction Controls



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.

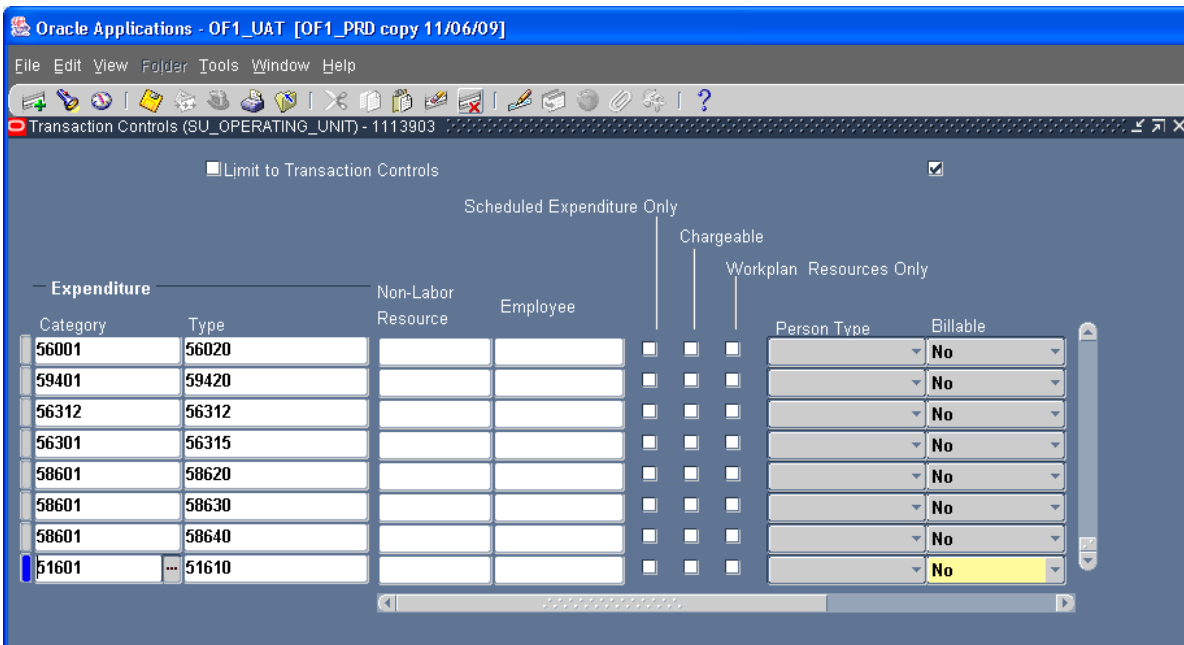


3. Select any field in the row by clicking on it.
4. Select the "Delete" icon in the tool bar. (The icon with a red "X" on the right of the tool bar.)



(We are deleting exp type 53115.)

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



(Exp type 53115 has been deleted.)

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