IRIS REPORT
NEW RESTRICTED ACCOUNT SETUP NOTIFICATION LETTERS
EFFECTIVE 12/18/01

Due to Payroll and Human Resources "go-live" in IRIS, the new restricted account setup notification letters that were generated by the legacy accounting system are discontinued as of 12/18/01 for sponsored projects.

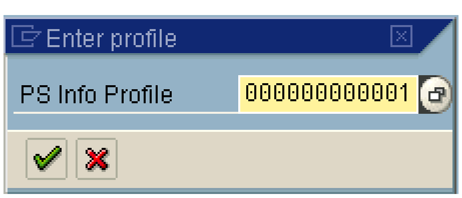
These instructions show how an IRIS user can run a report to see when new sponsored projects have been established in IRIS. This report is recommended on a periodic basis for departmental accounting staff, department heads, and other interested parties. Those areas with a large volume of sponsored projects may want to generate this report more frequently than those areas with fewer projects.

If you have submitted a request for a new project and are checking the status of your request, please use transaction CJ20N. There are instructions on the Controller's Office web site for how to look up a specific project number if you know only certain attributes.

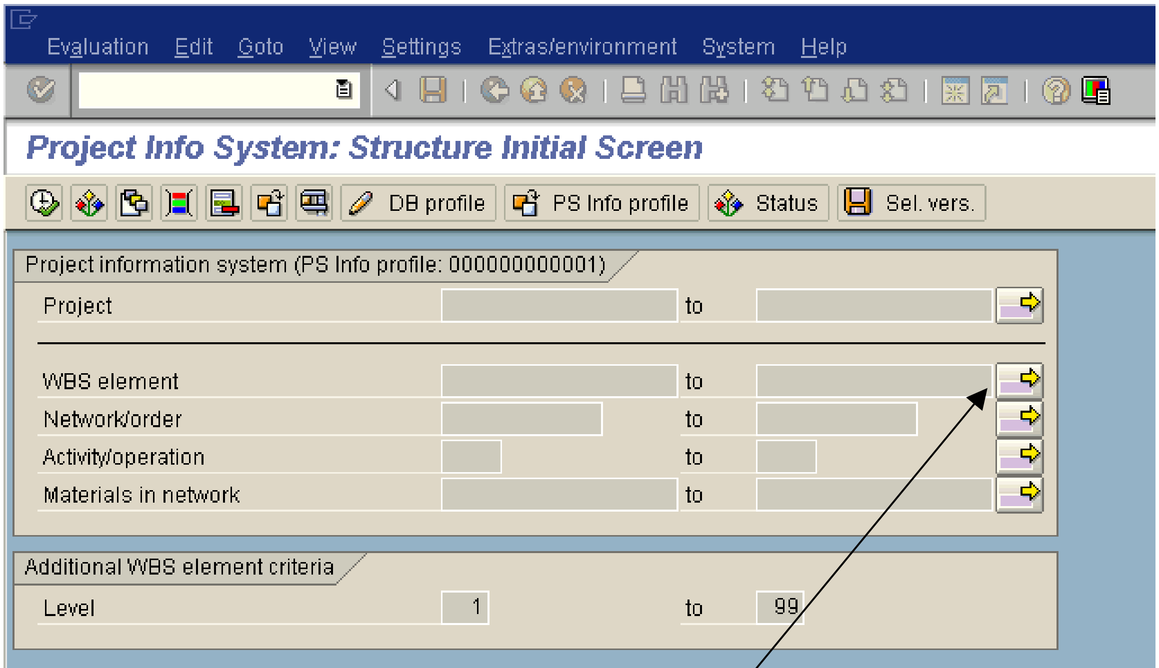
Transaction CNS41:

This document shows a quick overview of how to run this transaction to provide this specific information only. Complete instructions for many more uses of this transaction can be found in the Business Process Procedure (BPP) on the IRIS web site. It is located under Business Processes, Financial, Grants and Contracts, Project Systems.

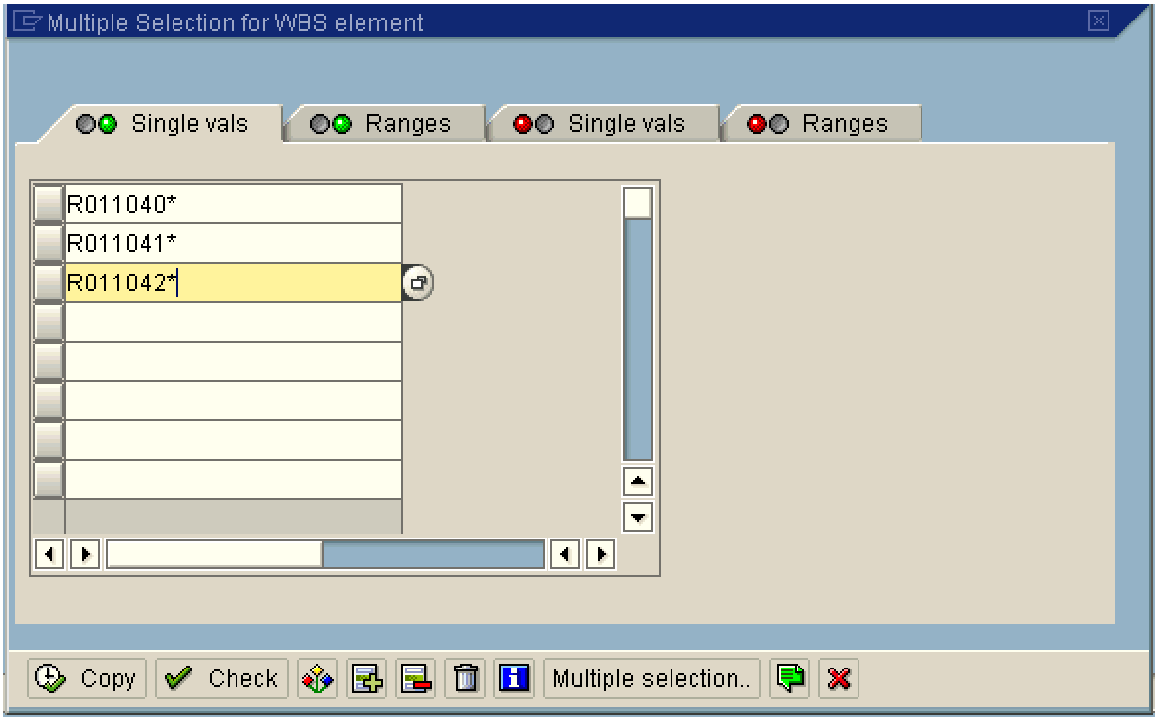
Type "CNS41" on the command line. You will get the following selection screen. You may be asked for the following information.



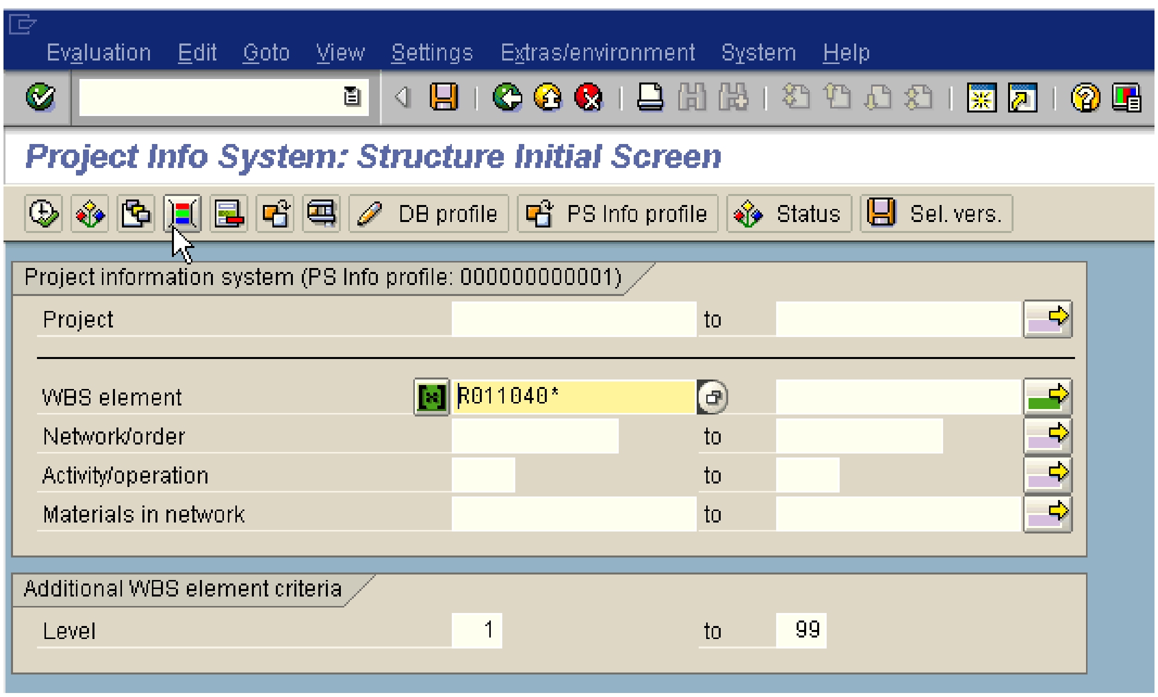
Press "enter" or the green check mark button.

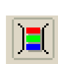


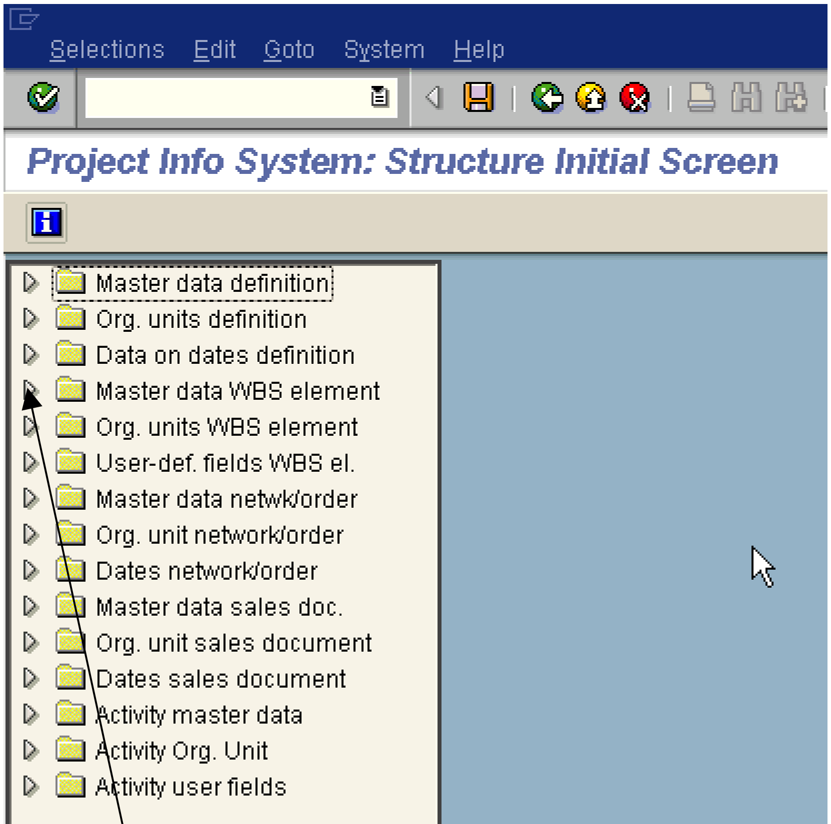
On the WBS element line, enter the number range(s) and wild cards (*) necessary to include all possible new project numbers for your area. If needed press the "Multiple selection" button to the right of the line. You will be presented with the screen below.



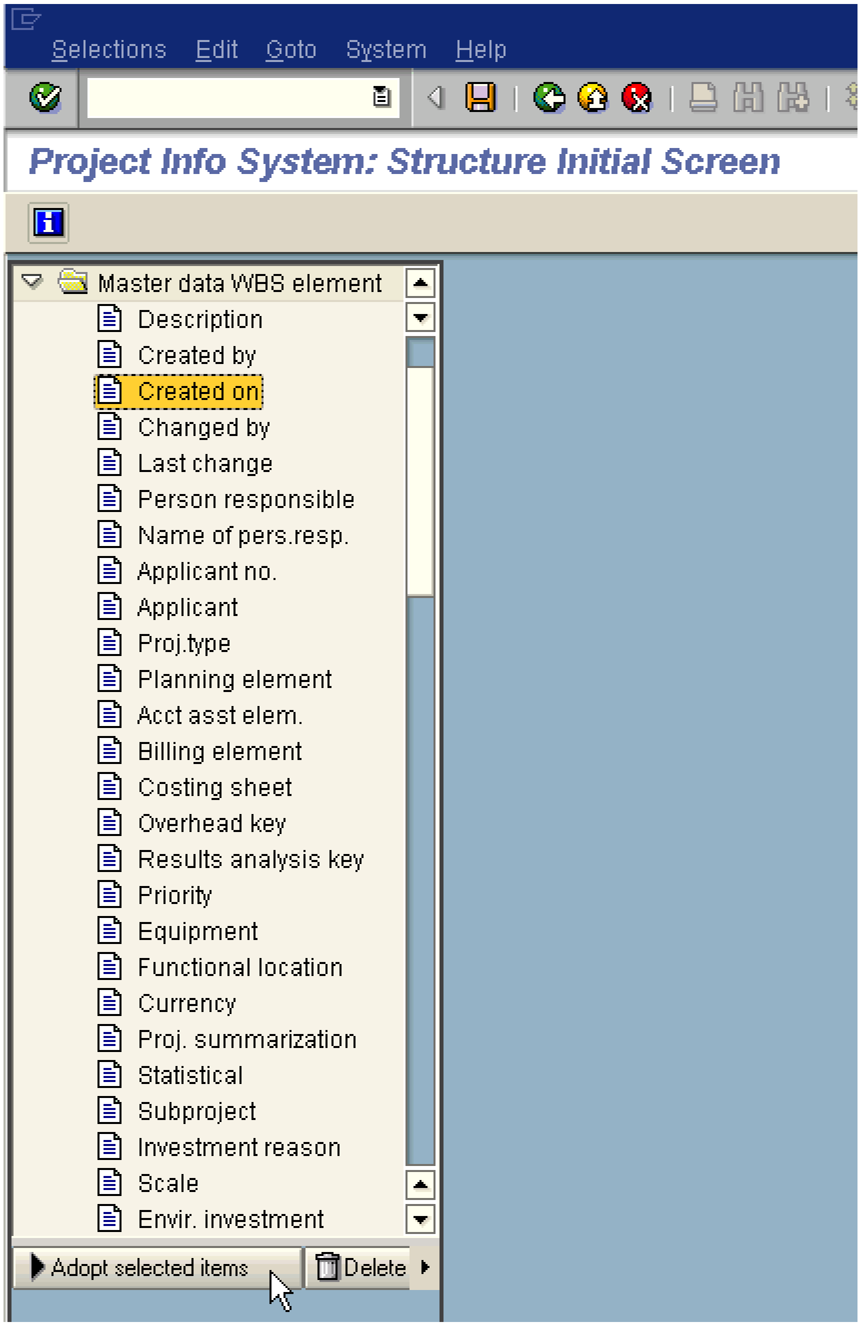
Press the "Copy" button  and your screen will appear as follows.



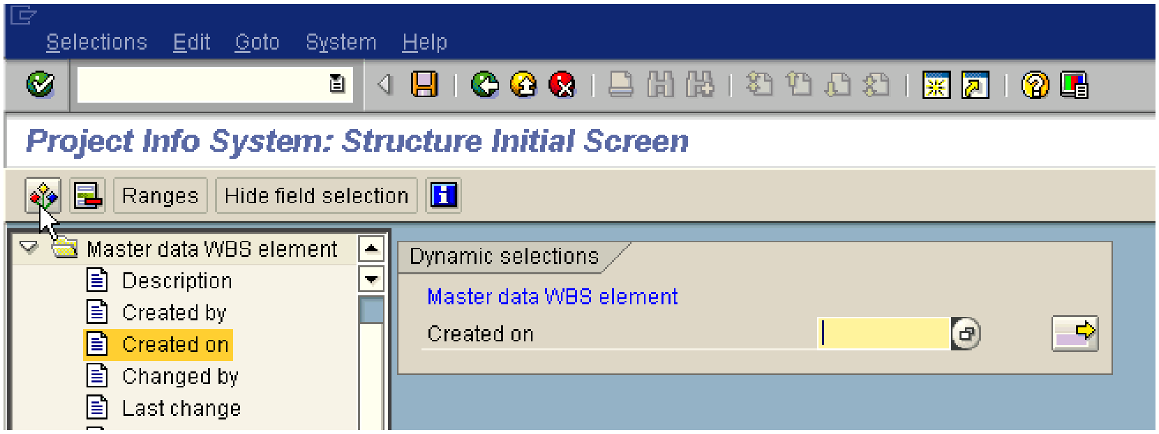
Press the "Dynamic selections" button  to get the following screen.



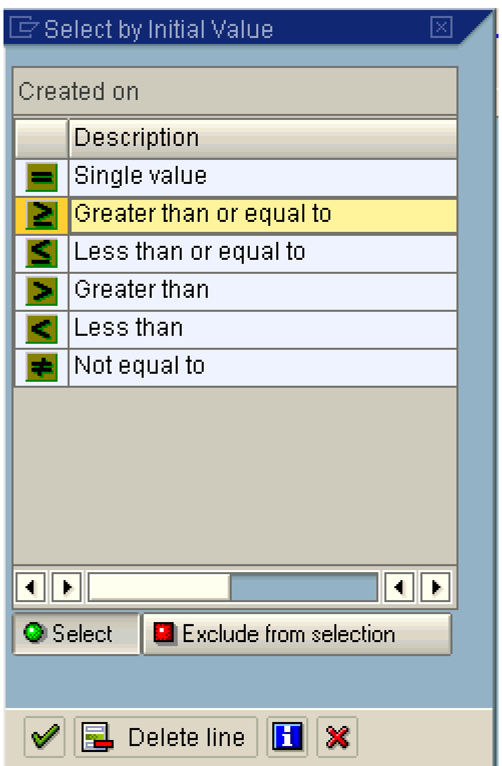
Press the triangle to the left of the folder called "Master data WBS element".

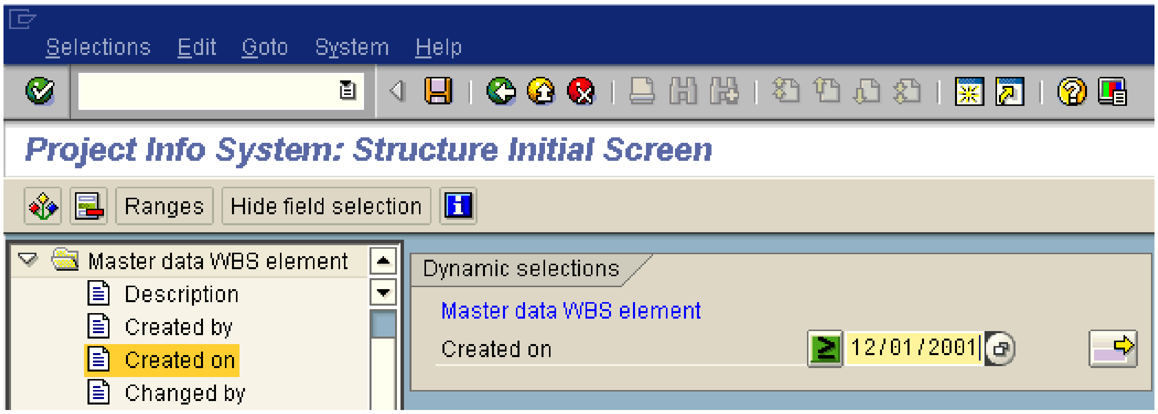


Highlight the attribute, "Created on" and press the button at the bottom, "Adopt selected items".

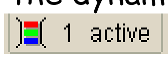


Press the "Selections options" button  and you will receive the following choices. Highlight "Greater than or equal to" and press the "Select" button as shown below. Press "enter" or the green check mark button.

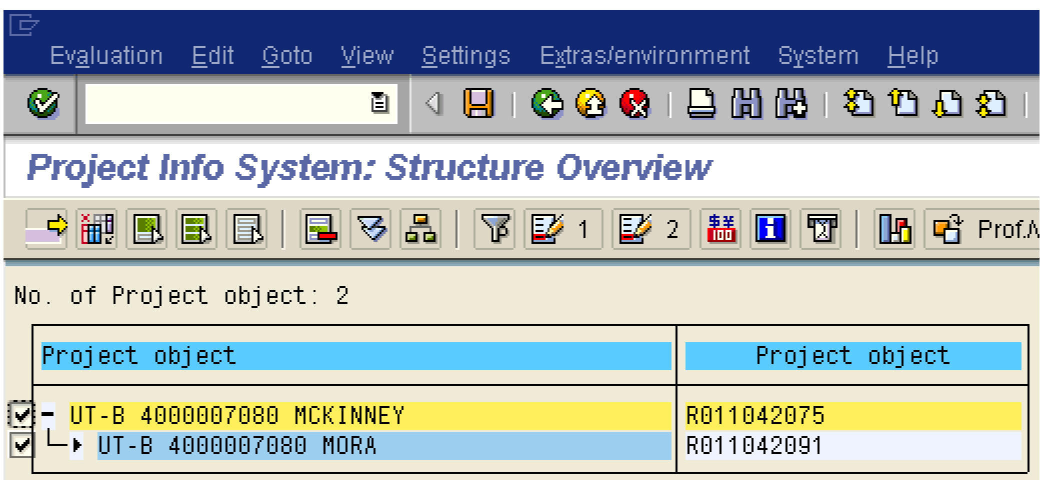




Enter a date in the field. Initially, choose a date in early December, 2001 which is before the account notification letters were discontinued. In subsequent reports, you should use a date based on when you last ran the report. In this example, I am running this report on 12/18/01. The next time that I run this report, I could use 12/15/01.

Press the "Save" icon and you will be taken back to the selection screen. You can tell that the dynamic selection above was saved by the icon at the top of the screen. 

Press the execute icon to receive the report. In this example, there was one new WBS element created.



This report presents the new WBS element (blue) under the related Project definition (yellow).

Using the “Choose fields” icon, you can customize your report as desired. See the following example.

Project object	Project object	Start (B)	Finish (B)	Obligated amount
- UT-B 4000007080 MCKINNEY	R011042075	02/01/2001	12/31/2001	0.00 USD
└▸ UT-B 4000007080 MORA	R011042091	09/01/2001	12/31/2001	9,747.00 USD

PI ID No	Proposal number	G&C accountant	In	Customer
525086440	001129-001	Hurd, Mike	2	180