**Freeze Grants Class Activity & Workshops**

**Class Activity: How to Freeze Feeders & POs**

Locate the Fund number corresponding to your terminal number from the information below. This fund represents a training grant in your department.

No Purchase Orders or Feeder System Journal Entries are to be charged to this fund. Your PI has requested that you ‘Freeze’ these respective transaction sources to prevent possible wayward transactions.

Instructions:

- Type Fund number in the ‘Fund’ field
- Press [Find]
- Click on [Freeze Status]
- Click on ‘Choose Action’ drop down arrow
- Select ‘Freeze Feeders’
- Type a message in Comments field
  - Click on Edit> Edit field to view entire Comments field
- Click on [Save] to complete action
- Repeat steps to ‘Freeze POs’
- Checkmarks in transaction source denotes ‘Frozen’
- Click [Action History]
Class Activity: How to Set Function Override

You are responsible for managing one of the funds listed below that corresponds to your terminal number. Due to your exemplary grant management skills, you are prepared to hand this fund over to ORS prior to the Account End Date.

Set the Function Override on this fund, freezing all transaction sources, including Payroll. The PI has given you approval via e-mail to perform this function.

Instructions:

• Type Fund number in the ‘Fund’ field
• Press [Find]
• Click on [Freeze Status]
• Click on ‘Choose Action’ drop down arrow
• Select ‘Set Function Override’
• Type a message in Comments field
  • Click on Edit>Edit field or Ctrl-E to view entire Comments field
• Click on [Save] to complete action
• Note pop-up window that appears
• Click [Continue]
• Checkmarks in transaction source denotes ‘Frozen’
• Note no further actions listed in ‘Choose Action’
• Click [Action History]
• Dates, times, user ID, and comments available for all transactions
Workshop #1 Freeze Feeder & Manual JE

- Using the appropriate Fund number to the right, the PI has informed you that this fund should have no further Feeder or Manual JEs – freeze both categories
- After performing the freeze, it is decided that the PI will be getting a Purchasing Card. Who would you need to contact to ‘Unfreeze’ Purchasing Card transactions
- What would happen to any Purchasing Card charges if unfreeze doesn’t occur?

Workshop #2 Function Override

- Through effective grant management, you have prepared this fund for closeout prior to the Account End Date
- Given the PI’s approval, move forward and set the Function Override
- What should be considered before performing this action?

Workshop #3 Unfreeze

- You are still in the Adjustment Period for Workshop #1 above
- Perform and ‘Unfreeze’ on the Manual JEs