

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]**

Terminal	FUND
TRAINER	595140
Training01	595141
Training02	595142
Training03	595143
Training04	595144
Training05	595145
Training06	595146
Training07	595147
Training08	595148
Training09	595149
Training10	595150
Training11	595151
Training12	595152
Training13	595153
Training14	595154

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

Terminal#	FUND
TRAINER	595160
Training01	595161
Training02	595162
Training03	595163
Training04	595164
Training05	595165
Training06	595166
Training07	595167
Training08	595168
Training09	595169
Training10	595170
Training11	595171
Training12	595172
Training13	595173
Training14	595174

Forms

 Setting Function Override would FREEZE all sources. Only Research Services would be able to update the freeze status of this fund. Are you sure you want to continue?

Continue **Cancel**

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?

Terminal #	FUND
TRAINER	595180
Training01	595181
Training02	595182
Training03	595183
Training04	595184
Training05	595185
Training06	595186
Training07	595187
Training08	595188
Training09	595189
Training10	595190
Training11	595191
Training12	595192
Training13	595193
Training14	595194

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?

Terminal #	FUND
TRAINER	595200
Training01	595201
Training02	595202
Training03	595203
Training04	595204
Training05	595205
Training06	595206
Training07	595207
Training08	595208
Training09	595209
Training10	595210
Training11	595211
Training12	595212
Training13	595213
Training14	595214

Workshop #3 Unfreeze

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