

**ben** financials

**ben** balances

# Freeze/Unfreeze Grant (Secured)









*Document Last Updated June 30, 2016*

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## Objectives

### Upon completion of this section, you will:

-  have an overview of BEN, BEN Financials and BEN Balances
-  know why the Freeze/Unfreeze Grant responsibility is necessary
-  understand the policies surrounding the Freeze Grant process
-  learn how to access the Freeze/Unfreeze Grant responsibility
-  know the steps for freezing and unfreezing a grant
-  know how to query the results of a freeze and/or unfreeze action in the View Grant Attribute responsibility
-  learn how to query information about the individual who processed a freeze or unfreeze grant action via View User
-  know where to go for assistance when necessary

## Overview of BEN

### Business Enterprise Network (BEN)

Penn's business and financial management systems which includes

- Web-enabled applications and tools
- Support structure

### Desktop Configuration

Consistent with current University standards

[http://www.finance.upenn.edu/ben/benfin/desktop\\_req/](http://www.finance.upenn.edu/ben/benfin/desktop_req/)

Local Support Providers (LSP's)

<http://www.upenn.edu/computing/view/support/staff.html>

- List of primary computer support assigned by Center and by Department

### Access/Security

Penn eForms

<http://www.upenn.edu/computing/da/eforms/>

### Important Web Addresses

U@Penn Portal

[http://medley.isc-seo.upenn.edu/penn\\_portal/u@penn.php](http://medley.isc-seo.upenn.edu/penn_portal/u@penn.php)

- Access to a wide variety of University web sites and information including those listed below

BEN Financials Homepage

<http://benapps.isc-seo.upenn.edu>

- Access to BEN Financials and BEN Deposits

Business Enterprise Network

<http://www.finance.upenn.edu/ben>

- News, Calendar, BEN Reps, BEN Knows, Frequently Asked Questions, Support Information, etc.

Financial Training Department Web Page

<http://www.finance.upenn.edu/ftd/>

- Information regarding courses offered, register for training, view the Bottom Line Newsletter, etc.

Audit and Compliance Web Page

<http://www.upenn.edu/audit/>

- Information on controls, compliance mechanisms, and technologies to manage risk as well as providing guidance on the stewardship of University resources

Responsibility Center Management (RCM)

<http://www.finance.upenn.edu/comptroller/rcm/index.shtml>

- Information about BEN Financials Reports, Fund Aggregations & Object Code Aggregations, etc.

## Overview of BEN (continued)

Purchasing Services Web Page

<http://www.purchasing.upenn.edu/>

- Information about BEN Buys, the Commodity Matrix, Supplier information, etc.

Purchasing Forms

<http://www.purchasing.upenn.edu/forms/>

- Request to Add a New BEN Buys Supplier
- Request to Add a New BEN Buys Ship-To-Location
- Request for University Tax Exemption Certificate
- Request to Resend Approved Purchase Order to Supplier
- And more...

## Need Help?

Dial 6-HELP (6-4357 or 215/746-4357)

- Enter your two-digit School or Center code
- BEN Helps is available 9:00 a.m. to 5 p.m. Monday through Friday

BEN Knows Web Page

<http://www.finance.upenn.edu/benknows/>

- Web site to browse and search for possible solutions to your BEN Financials questions

Office of Research Services

<http://upenn.edu/researchservices>

## Penn eForms

Penn eForms are required for entry to most University financial systems. These eForms should be processed promptly to ensure system access following training. **If an eForm has not been processed within 60 days or more of attending a training course, you will be required to repeat the course to obtain access.**

## Why do we have the Freeze/Unfreeze Grant Responsibility?

- Provide a tool that allows school and department grant managers and Research Services to limit activity against grant accounts during the life of the project, the Adjustment Period, and the reporting period.
- Significantly reduce the manual effort and rework involved in the continuous monitoring of grants, both during and after the Adjustment Period, allowing the redirection of effort to more productive grant management activities.
- Improve the accuracy and timeliness of final reports by stabilizing grants after the Account End Date or after the end of the Project Period.
- Provide more effective control of grant activity to ensure that activity after the Account End Date is more likely to be allocable to the grant. This should reduce cost transfers, as well as involuntary cost sharing for transactions which may not be truly allocable to the grant.

## Overview of Freeze/Unfreeze Responsibility

### General Features

- Grants frozen at FUND level
- Freezing does not affect ability to query or run reports on a grant account
- Freeze status available on standard reports for grants, and on the 138.ORG Frozen Fund List report

### Activity Subject to Freeze

- Manual on-line journal entry/encumbrance entry
- New Requisitions or Purchase Orders
- PDA Forms
- Feeder system Journals
- Payroll/Salary Management journals

### Activity Exempt from Freeze

- Activity initiated by Office of Research Services
- System generated activity (e.g. mass allocations, overhead, revenue recognition)
- Accounts Payable invoice transactions for existing Purchase Orders
- Purchasing transactions related to existing encumbrances (e.g. PO cancellations, PO Finally Close)
- Budget journals
- Transactions 'in progress' before freeze action was taken

## Who Can Freeze and Unfreeze?

- During the Project Period
  - Authorized users with access to the RESP ORG of the fund
- During the Adjustment Period
  - Authorized users with access to the RESP ORG of the fund
  - 'Unfreeze' no longer available for New POs
    - New POs can only be unfrozen by extending the Project Period
    - Project period extensions must be handled according to University and sponsor guidelines
- After the Adjustment Period
  - The system automatically freezes any transaction (TX) source not already frozen
  - Research Services will consider requests to 'unfreeze' on a case by case basis

## Grant Life Cycle

### Project Period

- Period of time between ACCOUNT START and ACCOUNT END dates

### Adjustment Period

- Period of up to 60 days after ACCOUNT END date
- Allows for review of project activity
- Adjustments can be made prior to final reporting

### Reporting Period

- Period immediately following Adjustment Period
- Research Services prepares to issue final report

## Adjustment Period Calculation

### When [Submit Final Report] = 90 Days or blank

- And the Account End Date is within first 9 days of a month
  - Adjustment Period End Date (**APED**) is at the end of the next Accounting Period
- And the Account End Date falls after first 9 days of a month
  - APED is at the end of the Period following the next Accounting Period

### When [Submit Final Report] = 60 Days

- And the Account End Date is within first 9 days of a month
  - APED is at the end of the same Accounting Period
- And the Account End Date falls after first 9 days of a month
  - APED is at the end of the next Accounting Period

### When [Submit Final Report] = 30 Days

- APED = Account End Date + 15 days



## Things to Consider Before Freezing

### Manual On-Line Journal Entries

- Are there any existing wayward or unallowable transactions outstanding?
- Are all Purchase Orders 'Finally Closed'?
- Is there a deficit/surplus?
- Do any encumbrances have to be removed manually?

### PDA Forms

- Has Accounts Payable processed all outstanding forms?
- Are all non-PO sub-contracts paid for?

### New Requisitions and POs

- Did you notify all PO Managers/Requisitioners who use the grant?
- Any purchases planned?

### Feeder Systems

- Outstanding Purchasing card transactions from any of the Purchasing Card holders who use the grant?
- Have you notified all feeders of new fund number?
- Have you notified all Procurement Card holders who use the grant?

### Payroll

- Have all payroll distributions been updated?
- Are there outstanding payroll reallocations?

### Function Override

- Consider ALL of the above!
- Only Research Services (ORS) can unfreeze fund

### General

- Freeze affects all ORGs using fund

## Logging on to BEN Financials

From the U@Penn Portal Business Tab ([http://medley.isc-seo.upenn.edu/penn\\_portal/u@penn.php](http://medley.isc-seo.upenn.edu/penn_portal/u@penn.php))

- Click on BEN Financials>BEN Financials Homepage or type <http://benapps.isc-seo.upenn.edu/>



*These are websites you may want to create a "bookmark" or "favorite" in your web browser*

**ben** BUSINESS ENTERPRISE NETWORK

About BEN   Contacts   News   Related Links

**W**elcome to the Business Enterprise Network (BEN) site, your gateway to Penn's web-based financial systems and related information and services. Access to the systems is limited to authorized University staff and faculty.

**BEN Financials** : Core financial system providing purchasing (BEN Buys), payables (BEN Pays), and general ledger (BEN Balances) functions. Before you log on, check for [late-breaking advisories and useful suggestions](#) for using BEN Financials (Last Updated: 02/28/2002).

**BEN Reports** : System for retrieving financial and sponsored project information from the Data Warehouse in predefined formats; includes links to other applications such as GRAM and Position Inventory.

Send Comments & Inquiries about this site to [ben@pobox.upenn.edu](mailto:ben@pobox.upenn.edu)  
Copyright © 2002 University of Pennsylvania All Rights Reserved  
File Last Updated : Thursday February 28, 2002

- Click on **BEN Financials**

**ben financials**

\*User Name   
(example: YASMITH)

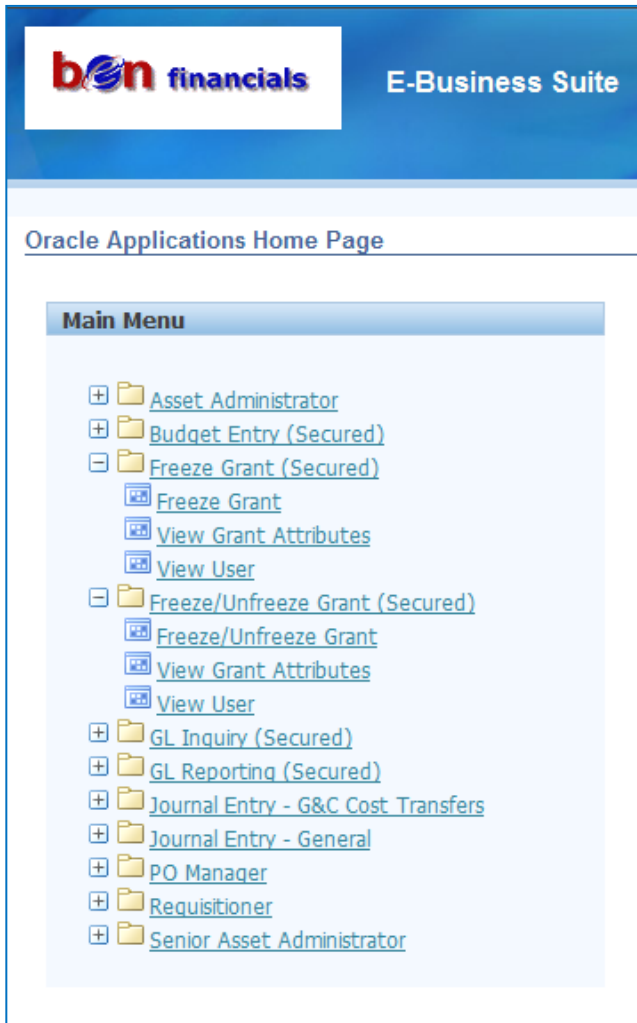
\*Password   
At least 8 characters consisting of one letter and one number

[Login Assistance](#)


Select a Language:  
English

- Enter your application **User Name** and **Password**
- Click on **[Login]** or press **[Enter]**

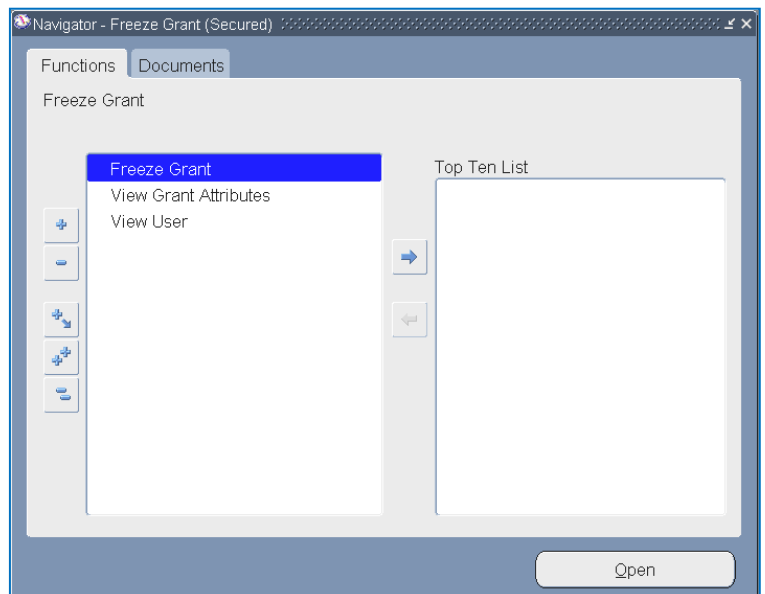
## BEN Financials Homepage



- Select the desired Responsibility, in this case either
  - **Freeze Grant (Secured)**
  - **Freeze/Unfreeze Grant (Secured)**

 *The Navigator window briefly appears on the screen. To change a navigation path within a responsibility, invoke the Navigator by*

- *Closing all forms or*
- *Clicking on the 'Show Navigator' icon on the toolbar*



## View Grant Attributes

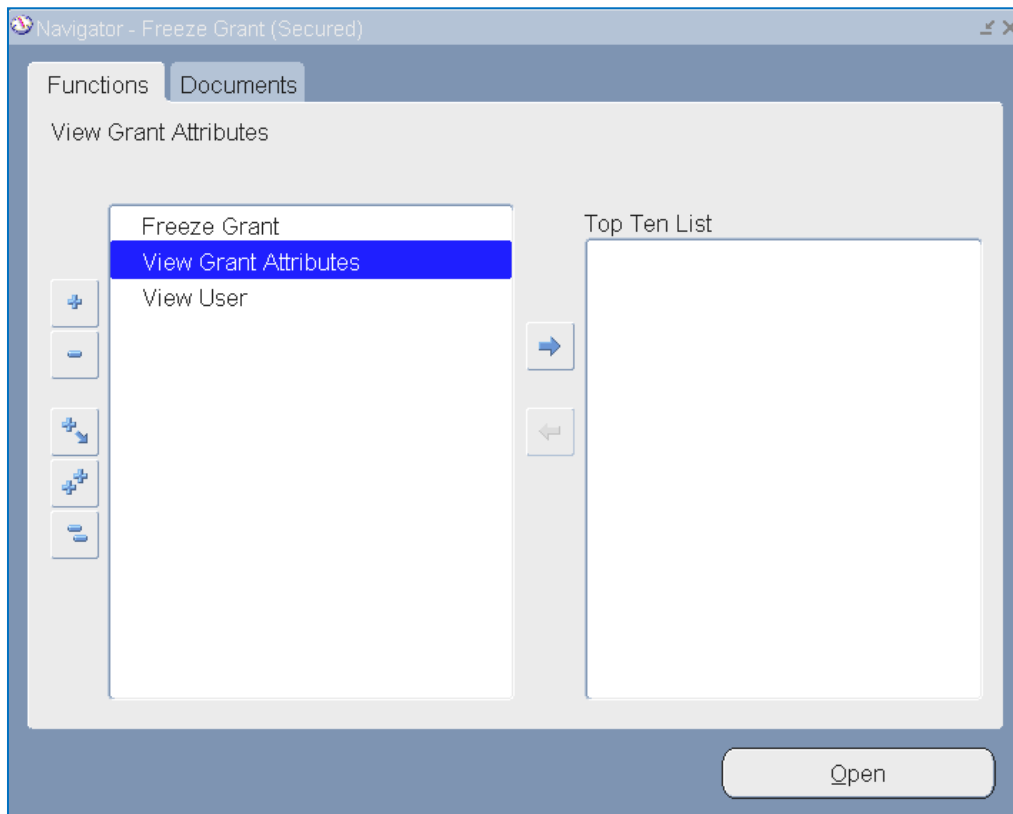
All GL users have access to View Grant Attributes. View Grant Attributes allows users to view grant funds (5xxxxx) and their corresponding attributes. The same information is available via the COA Segment Values menu option. The only difference between the two, aside from the visual format, is that View Grant Attributes allows you to see the Freeze Status and the Freeze Action History. View Grant Attributes is a view-only screen; to modify the freeze status of any category, you will need either the Freeze Grant or the Freeze/Unfreeze Grant Responsibility.



*For those who manage Grant Funds, the information here is the same information in the GL Inquiry (Secured) Responsibility COA Inquiry>View Grant Attributes navigation path. This information should match the information found on the AIS (Account Information Sheet). If there are any discrepancies, contact your accountant in the Office of Research Services (ORS), a list of whom can be found at:*

<http://www.upenn.edu/researchservices/contacts.html>

- Click on **View Grant Attributes** from either the BEN Financials Homepage or the Navigator shown below



## View Grant Attributes (continued)

### Fund Info Window

The screenshot shows the 'View Grant Attributes' window. A 'Find Funds' pop-up dialog box is open, prompting the user to 'Enter Fund Number' in a text field. Below the text field are 'Clear' and 'Find' buttons. The background window contains various fields for grant attributes, including Fund, Account Start Date, Current Budget End Date, Account End Date, Days to Submit Final Report, Report Frequency Code, Adjustment Period End Date, Next Fin Report Due, Fund Purpose, PI Name, Legacy Sponsor, Sponsor Description, Report Format Code, Bill Format Code, Bill Freq Code, LOC Rpt Status, Resp Org, Transaction ID, CFDA Number, and five Budget Period End Dates. At the bottom of the window are 'Freeze Status' and 'Action History' buttons.

- Type in **Fund** number in the pop-up box



*In the Freeze Grant or Freeze/Unfreeze Grant responsibility, the List of Values (LOV) will only list those funds users have access to by virtue of the Responsible ORG of the Fund.*

The screenshot shows the 'View Grant Attributes' window with the 'Find' button clicked. The 'Fund' field is populated with '542854' and the 'Fund Purpose' is '10 SPONSORED RESEARCH'. Other populated fields include: Account Start Date (06-JUL-2004), Current Budget End Date (30-APR-2008), Account End Date (30-APR-2008), Days to Submit Final Report (90), Report Frequency Code (F), Adjustment Period End Date (30-JUN-2008), Next Fin Report Due (21-JUL-2008), Final Report Submitted (21-JUL-2008), PI Name (CHENEY, DOROTHY L), Legacy Sponsor (1110), Sponsor (09470), Federal flow flag (unchecked), CFDA Number (93.242), Sponsor Description (NATIONAL INSTITUTES OF HEALTH), Report Format Code (03), E.FSR-SF269, and five Budget Period End Dates (30-APR-2005, 30-APR-2006, 30-APR-2008, and two empty). The 'LOC Rpt Status' is 'C'. The 'Resp Org' is '0103 BIOLOGY'. The 'LOC Transaction ID' is '8-RMH062249B'. At the bottom are 'Freeze Status' and 'Action History' buttons.

- Click on **[Find]**
  - Fund Info Window** reflects information found in COA Inquiry for grant fund attributes
  - Should match data found on Account Information Sheet (A.I.S.)
  - Contact the Office of Research Services if there are any discrepancies



*Days to Submit Final Report, this drives the Adjustment Period End Date*



Click on **[Freeze Status]**

## View Grant Attributes (continued)

### Freeze Status Window

The screenshot shows the 'View Grant Attributes' window with the following details:

- Fund:** 542854 | 5-R01-MH-062249-06
- Enabled:**
- Resp Org:** 0103 | BIOLOGY
- Account Start Date:** 06-JUL-2004
- Report Frequency Code:** F
- Current Budget End Date:** 30-APR-2008
- Adjustment Period End Date:** 30-JUN-2008
- Account End Date:** 30-APR-2008
- Next Fin Report Due:** [Empty]
- Days to Submit Final Report:** 90
- Final Report Submitted:** [Empty]
- Transaction Function Override:**
- Source:**
  - Manual JEs
  - PDA Form
  - New POs
  - Feeders
  - Payroll
- Status Date:** 01-JUL-2008 08:03
- Refreeze Date:** [Empty]
- NO other orgs use this fund:** NONE
- CHOOSE ACTION:** [Dropdown menu]
- Refreeze Date:** [Text input]
- Comments:** [Text input]
- Buttons:** SAVE, Fund Info, Action History

### Freeze Categories/Transaction Sources

If a category is 'frozen', no transactions within that category may hit that fund

- Categories frozen automatically after **Account End Date**
  - New Purchase Orders/Requisitions
    - No New POs or Requisitions should be created after Account End Date
- Categories frozen automatically after **Adjustment Period End Date (APED)**
  - Manual Journal Entries
  - PDA Forms
  - Feeder Journal Entries
  - Payroll
- Function Override
  - Freezes all categories (including Payroll)
  - Turns fund over to Office of Research Services before APED
- Click on **[Action History]**

## View Grant Attributes (continued)

### Action History Window

The screenshot shows a window titled "View Grant Attributes" with the following details:

- Fund: 542854 5-R01-MH-062249-06
- Enabled:
- Resp Org: 0103 BIOLOGY

Record 2:


- Record No: 2
- Status Dt: 01-JUL-2008 08:03
- Auto Freeze - Freeze All Sources:
- GLADMIN
- Transaction Source:  Manual JEs,  PDA Form,  New POs,  Feeders,  Payroll
- Status Dt: 01-JUL-2008, 01-JUL-2008, 01-MAY-2008, 01-JUL-2008, 01-JUL-2008
- Refreeze Dt: (empty)
- Function Override:
- Account End: 30-APR-2008, Rpt Days: 90, Adj Pd End: 30-JUN-2008, Comments: Fund is in the Reporting Period

Record 1:


- Record No: 1
- Status Dt: 01-MAY-2008 01:57
- Auto Freeze - Freeze PO:
- GLADMIN
- Transaction Source:  Manual JEs,  PDA Form,  New POs,  Feeders,  Payroll
- Status Dt: (empty), (empty), 01-MAY-2008, (empty), (empty)
- Refreeze Dt: (empty)
- Function Override:
- Account End: 30-APR-2008, Rpt Days: 90, Adj Pd End: 30-JUN-2008, Comments: Fund is in the Adjustment Period

Buttons: Fund Info, BACK

- Most recent action appears first
- Freeze actions recognized immediately by BEN Financials after being saved, **except payroll**
- To view comments, place cursor in "Comments" field and click on **Edit>Edit Field** (or **Ctrl-E**)

 *Can't query fund here, must click on [Back]*

### Entering a New Query

 A new query must begin in either the **Fund Info** or the **Freeze Status** window

- Click on the **Flashlight icon** or **View> Find** or **View>Query By Example>Enter** or **F11**
- Type in Fund number
- Click on **[Find]** or **View>Query by Example>Run** or **[Ctrl] F11**

## Freeze/Unfreeze Grant Transaction Source Information

### Freeze Actions

- **Freeze All**
  - Freeze all categories, including payroll
  - Categories **can** be 'unfrozen' separately
- **Set Function Override**
  - Freeze all categories, including payroll
  - User **CAN NOT** 'unfreeze' - (can only be 'unfrozen' by Research Services)
- **Independent Transaction Sources**
  - Freeze PDA Form, Freeze Feeders, Freeze Manual JE, Freeze Payroll, Freeze PO

### Freeze Implications

- **Online Activity Freeze (Manual JEs, New POs, PDA Forms)**
  - Prevents transactions from being created; error message received
  - Accounts Payable to reject all PDA Forms with frozen funds to School/Center via Markview
- **Feeder System Freeze (includes Purchasing Card)**
  - Diverts transactions to ORG level suspense account
  - Frozen fund suspense can be found in object code 9599
  - Frozen fund **payroll** remains in object code 9501
- **Payroll Transaction Freeze**
  - Will **not** prevent individuals from being paid
  - Within the payroll system, you will not be able to:
    - Enter new distribution using frozen fund
    - Pay from existing distributions using frozen fund (suspense will result)
    - Reallocate to/from a frozen fund

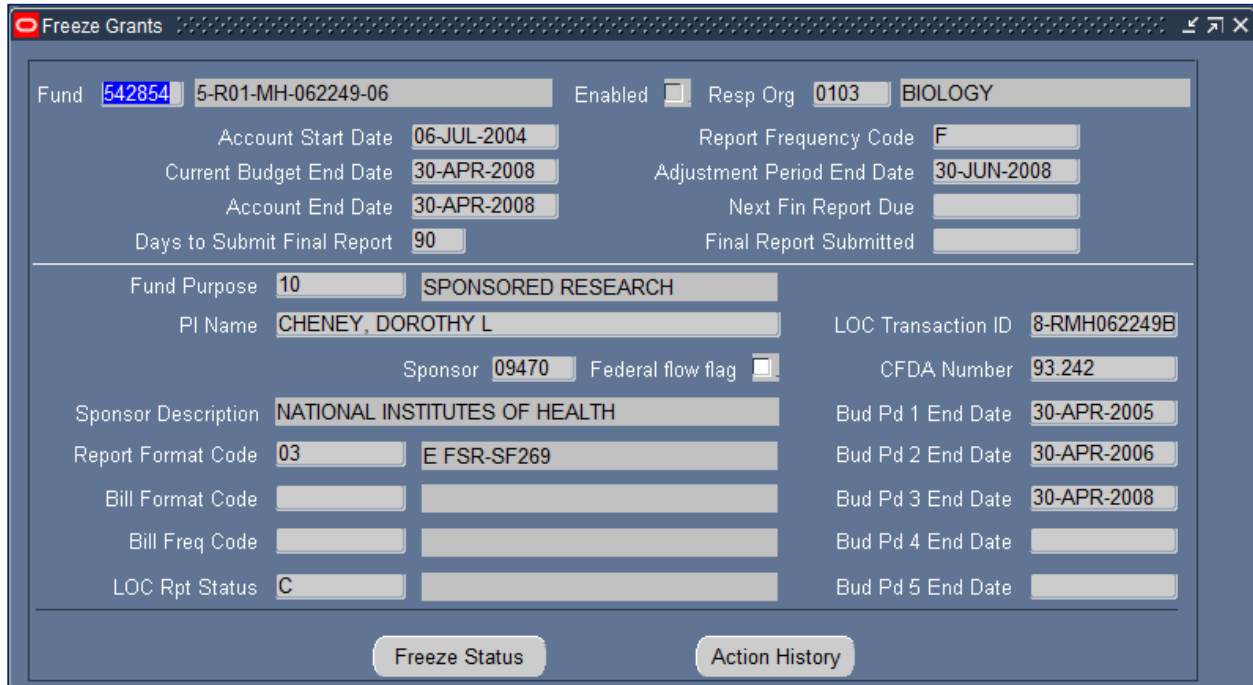


## How to Freeze a Grant Fund

If you have Freeze Grant (Secured) or Freeze/Unfreeze Grant (Secured) Responsibilities, you have the ability to freeze a grant prior to the Adjustment Period End Date (APED). Grants can be frozen/unfrozen to prevent activity from any one or more of the following:

- On-line journal entry/encumbrance entry
- New Purchase Orders/Requisitions
- PDA Forms
- Feeder journals
- Payroll/Salary Management journals

## FUND Info Window



The screenshot shows a 'Freeze Grants' window with the following fields and values:

Fund	542854	5-R01-MH-062249-06	Enabled	<input type="checkbox"/>	Resp Org	0103	BIOLOGY
Account Start Date	06-JUL-2004		Report Frequency Code	F			
Current Budget End Date	30-APR-2008		Adjustment Period End Date	30-JUN-2008			
Account End Date	30-APR-2008		Next Fin Report Due				
Days to Submit Final Report	90		Final Report Submitted				
Fund Purpose	10	SPONSORED RESEARCH					
PI Name	CHENEY, DOROTHY L			LOC Transaction ID	8-RMH062249B		
Sponsor	09470	Federal flow flag	<input type="checkbox"/>				
CFDA Number	93.242						
Sponsor Description	NATIONAL INSTITUTES OF HEALTH			Bud Pd 1 End Date	30-APR-2005		
Report Format Code	03	E FSR-SF269		Bud Pd 2 End Date	30-APR-2006		
Bill Format Code				Bud Pd 3 End Date	30-APR-2008		
Bill Freq Code				Bud Pd 4 End Date			
LOC Rpt Status	C			Bud Pd 5 End Date			

At the bottom of the window, there are two buttons: 'Freeze Status' and 'Action History'.

- Select either **Freeze Grant (Secured)** or **Freeze/Unfreeze Grant (Secured)** responsibility depending on your profile
  - Each end-user will only have access to one of these responsibilities
  - Research Services will have access to RS: Freeze/Unfreeze Grant (not secured)
- Type Fund number in the 'Fund' field
- Press **[Find]**
- Click on **[Freeze Status]**

## How to Freeze a Grant Fund (continued)

### Freeze Status Window

- Click on '**Choose Action**' drop down arrow
- Select from one of the following (the list of values will have one or more of these options available based on where you are in the grant life cycle and what the current freeze status of the fund is):
  - **Freeze All**
  - **Freeze Feeders**
  - **Freeze Manual JE**
  - **Freeze PDA Form**
  - **Freeze PO**
  - **Freeze Payroll**
  - **Set Function Override**
- Type a brief explanation in Comments field
  - Click on **Edit>Edit field** to view entire Comments field
- Click on **[Save]** to complete action
- Checkmarks in transaction source denotes 'Frozen'
- Note changes to actions; 'Unfreeze' actions now available if you have Freeze/Unfreeze Grant Responsibility
- Click **[Action History]**
  - Dates, times, user ID, and comments available for all transactions



*See the section on 'View User' for how to find more information on the user ID*

## How to Freeze a Grant Fund (continued)

If you have the Freeze/Unfreeze Grant (Secured) Responsibility, you have the ability to 'unfreeze' a frozen grant fund with the following guidelines:

- During the Project Period
  - Authorized users with access to the RESP ORG of the fund
- During the Adjustment Period
  - Authorized users with access to the RESP ORG of the fund
  - 'Unfreeze' no longer available for New POs
    - New POs/Requisitions can only be created by extending the Project Period
    - Project period extensions must be handled according to University and sponsor guidelines
- After the Adjustment Period
  - The system automatically freezes any transaction (TX) sources not already frozen
  - Research Services will consider requests to 'unfreeze' on a case by case basis

### Unfreeze Request to the Office of Research Services (ORS)

- Requests accepted via e-mail to the ORS Responsible Accountant with a cc to the ORS Responsible Assistant Director
- Each request must specify
  - Individual transactions needed (manual journal entry, purchase, etc.)
  - Particular 'Transaction Source' to be 'Unfrozen'
  - Anticipated time frame for 'Unfreeze'
  - Reason for delay in adjusting the account
- Requests must be consistent with University and sponsor policies for
  - Allowability
  - Allocability
  - Reasonableness
- All appropriate documentation should be sent to Office of Research Services

### Steps for Unfreezing a Grant Fund

- Follow the same steps for 'Freezing a Grant Fund' however, in the 'Choose Action' drop down box, select from one of the 'Unfreeze' options.

### More on Freeze/Unfreeze Grants

- Tool for more effective grant management
- Will not prevent grant deficits
- Not a substitute for appropriate management through the life of a grant
- Communication and cooperative effort is key
- Attempt to increase sponsor compliance
- Once Reporting Period reached, Office of Research Services assumes grant is ready for reporting to sponsor

## View User

To assist end-users in identifying the creator of general ledger transactions, an inquiry screen is available called "View User". This inquiry screen is included in the following responsibilities:


- Freeze Grant (Secured)
- Freeze/Unfreeze Grant (Secured)
- GL Inquiry (Secured)
- Journal Entry – General
- PO Manager

The screen will provide you with information available from the user database, including departmental address, e-mail address and whether or not the creator is still an active user of BEN Financials.

To use this screen, you will need to have the user ID of the individual who created the transaction in question.

- From the Freeze Grant responsibilities, the user ID appears in the **[Action History]** screen
- From the GL Inquiry responsibility, the user ID is found using the **Help>Record History** menu path.

- Type in the user name
- Click on **[Find]**

 You can also type a portion of the user name and use the '%' as a wildcard

## Revision History

<b>Date</b>	<b>Page Number(s)</b>	<b>Topic</b>
November 26, 2012 (BAM)	Various	R12 BEN Financials Upgrade
May 6, 2013	Page 9	Removed 'travel' under C-Forms (now PDA Forms)
July 7, 2015 (BDL)	Various	Updated all C-Forms to PDA Forms
June 30, 2016 (BDL)	Pages 4, 5 & 7	Removed 'BEN Reports' reference; no longer exists