CTS Org Administrator Guide

The Org Administrator role in CTS can grant access to users within their Chart/Organization, as well as enter, monitor, and create commitment subcategories. This document describes how to gain the Org Administrator role, manage permissions of other users, and create subcategories.

Review the CTS Commitment Entry Guide to learn how to enter and monitor commitments.

Contents

Gain the Org Administrator Role

The Org Administrator role in CTS is obtained by submitting a request to the University Budget Office (UBO) or to another Org Administrator. A RC or department Fiscal Officers may request the Org Administrator role on behalf of their staff by emailing budu@iu.edu the following information about the proposed Org Administrator:

- First and last name
- Username
- Chart and Organization to which the Org Administrator should be granted access

Once granted the role, Org Administrators can perform the following actions for their assigned Organizations:

- Manage user access by adding, editing, and inactivating users
- Add commitment categories and subcategories
- Add, edit, and search commitments

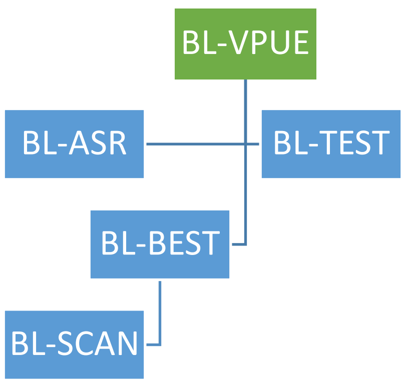
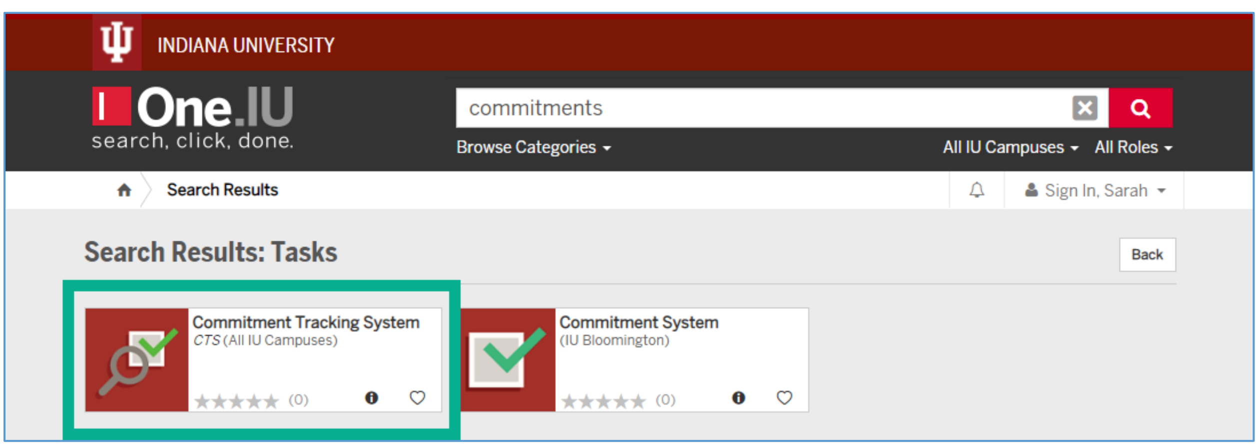


Chart and Organization assignment define the user's permissions. This impacts their ability to search for, add, and edit users and commitments in CTS. This is driven by the KFS Organizational Hierarchy. Use the Organizational Hierarchy query in IUIE to review this reporting structure for your organization.

For example, an Org Administrator is granted access for the Chart/Org BL-VPUE. They can manage permissions and enter commitments for BL-VPUE, their assigned Chart and Org, as well as all Organizations that report up to this Org, such as BL-ASR, BL-TEST, BL-BEST, BL-SCAN, etc. A visual representation of this hierarchy is presented to the left.

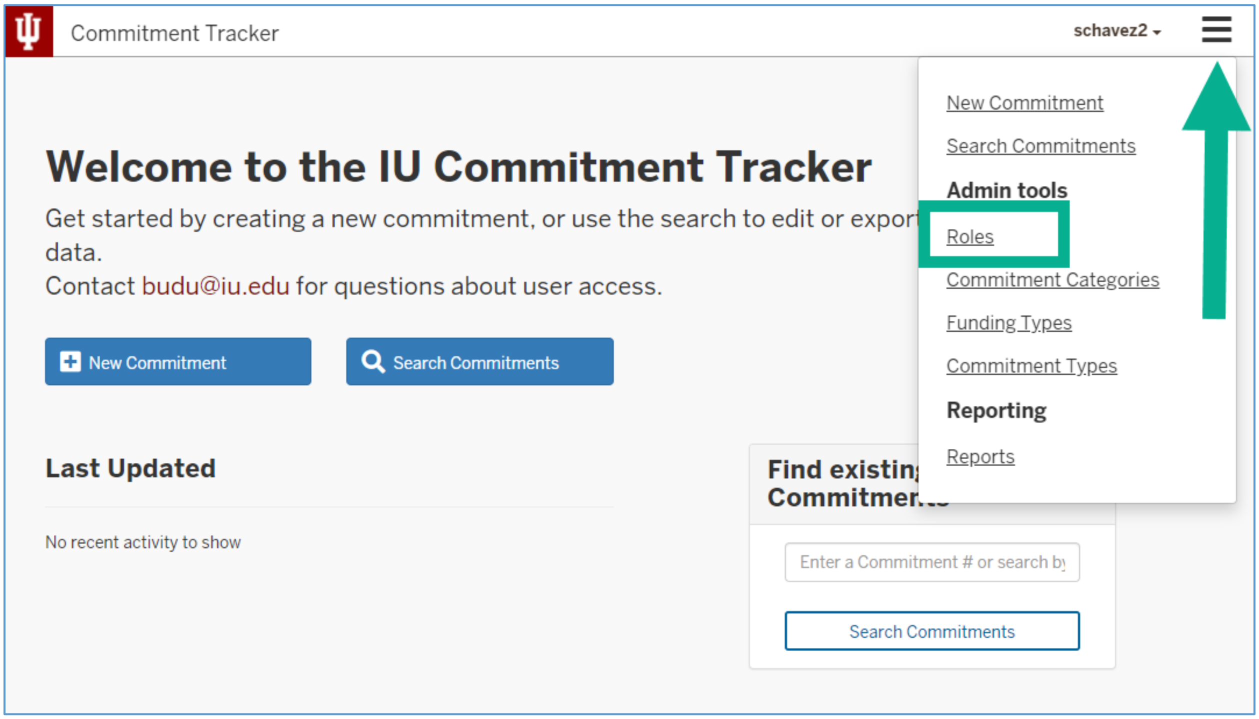
Access CTS

Access CTS via the Commitment Tracking System task tile in One.IU or the direct URL, commitments.iu.edu.

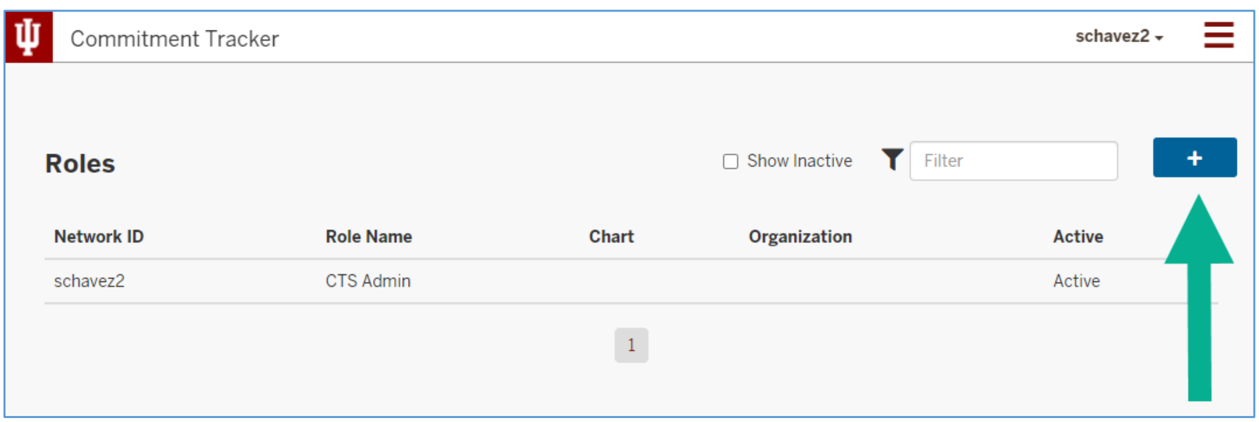


Add a User and Assign a Role

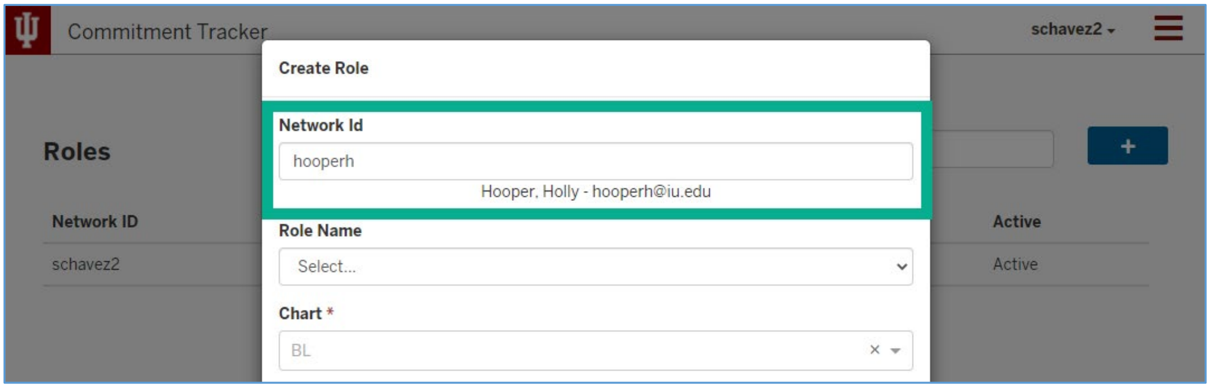
Access the Admin menu by clicking the **three horizontal bars** in the upper right-hand corner of the screen, next to your username. Select **Roles** under **Admin tools**.



On the Roles page, click the **plus button** to add a new user.



A new window opens where you will enter the user's information. Enter the individual's username in the **Network Id** field. Tab or click outside the field and it refreshes to reflect the user's first and last name and email address.



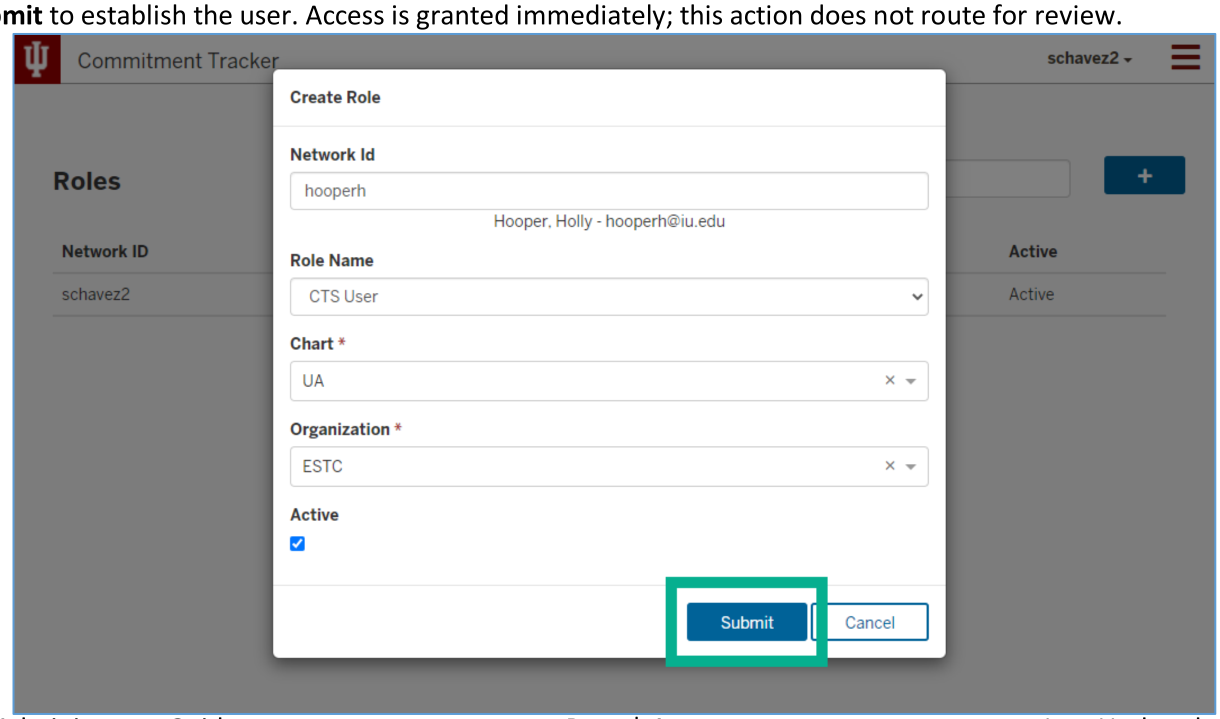
Next, select the appropriate role for the individual from the **Role Name** drop-down menu. The table below defines each role and its permissions in CTS.

Role Name	Permissions
CTS Org Administrator	• Manage user access by adding, editing, and inactivating users • Add commitment categories and subcategories • Add, edit, and search commitments
CTS User	• Search for, add, and edit commitments based on Chart/Org assignment
CTS View Only	• Search for and view commitments based on Chart/Org assignment

Finally, define the **Chart** and **Organization** of the individual using the appropriate fields. Remember, permissions in CTS are driven by the Chart and Organization. Refer to the Gain the Org Administrator Role section above for more information.

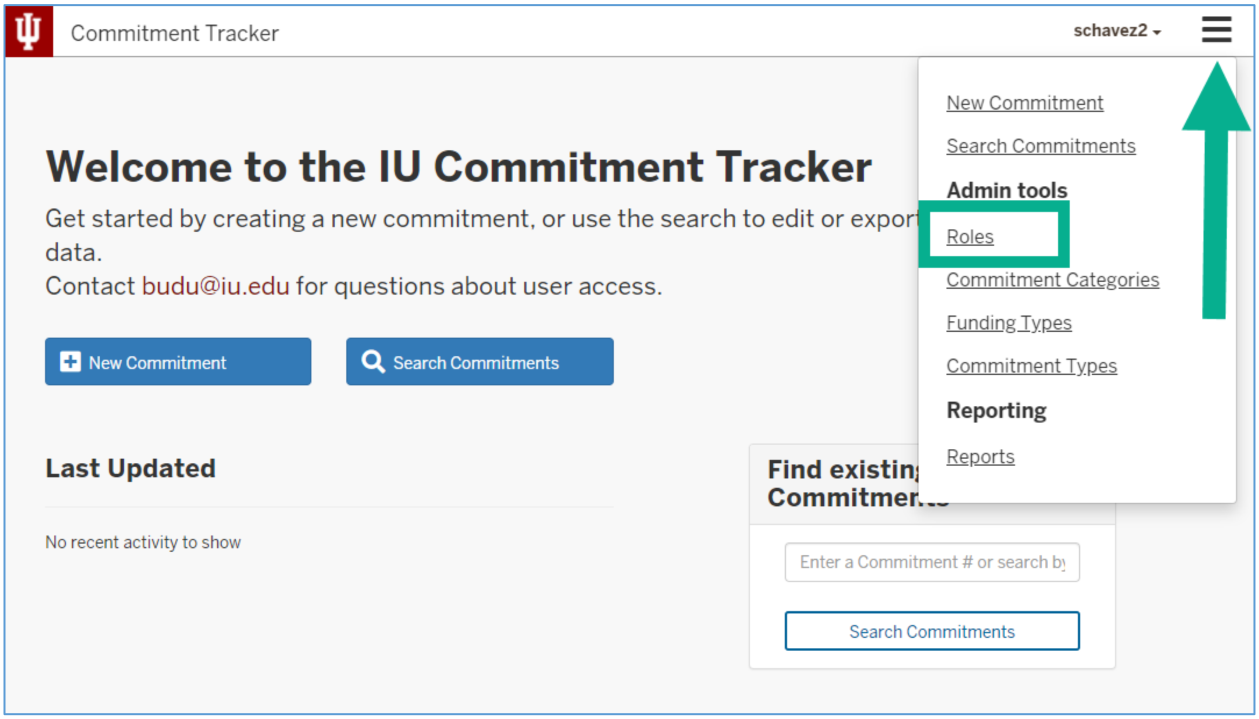
Type your org code in the Organization field to locate your org quickly.

Click **Submit** to establish the user. Access is granted immediately; this action does not route for review.



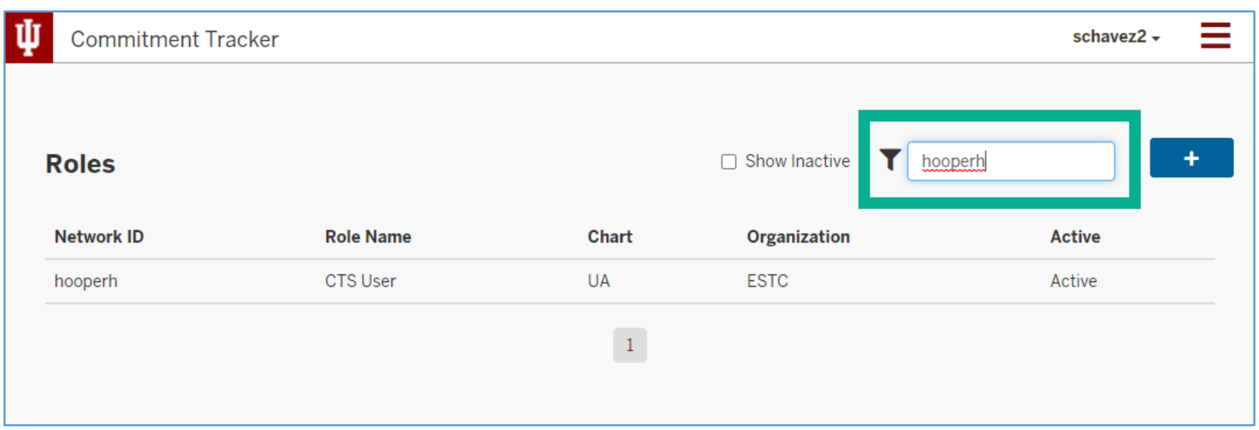
Edit, Activate, or Inactivate an Existing User

Access the Admin menu by clicking the **three horizontal bars** in the upper right-hand corner of the screen, next to your username. Select **Roles** under **Admin tools**.

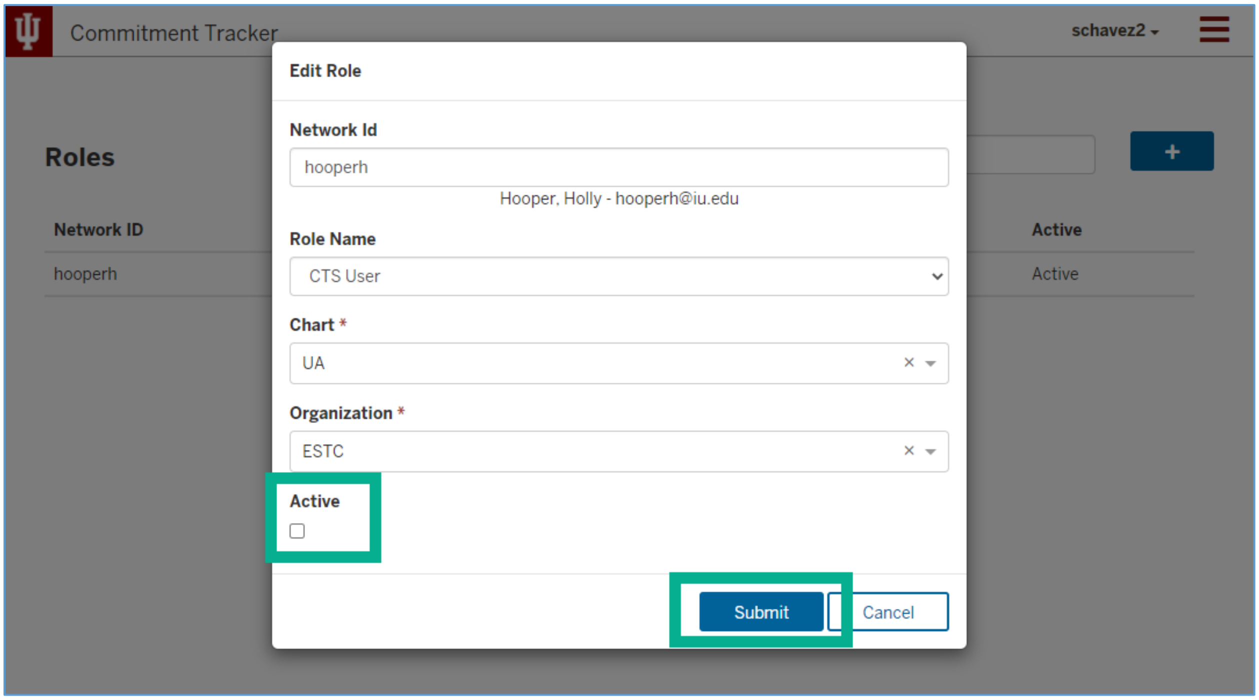


Enter the individual's username in the **Filter** field in the upper right-hand section of the page. Select the row containing the user to edit permissions in a pop-up window.

If you are activating a user, check the box next to **Show Inactive**.



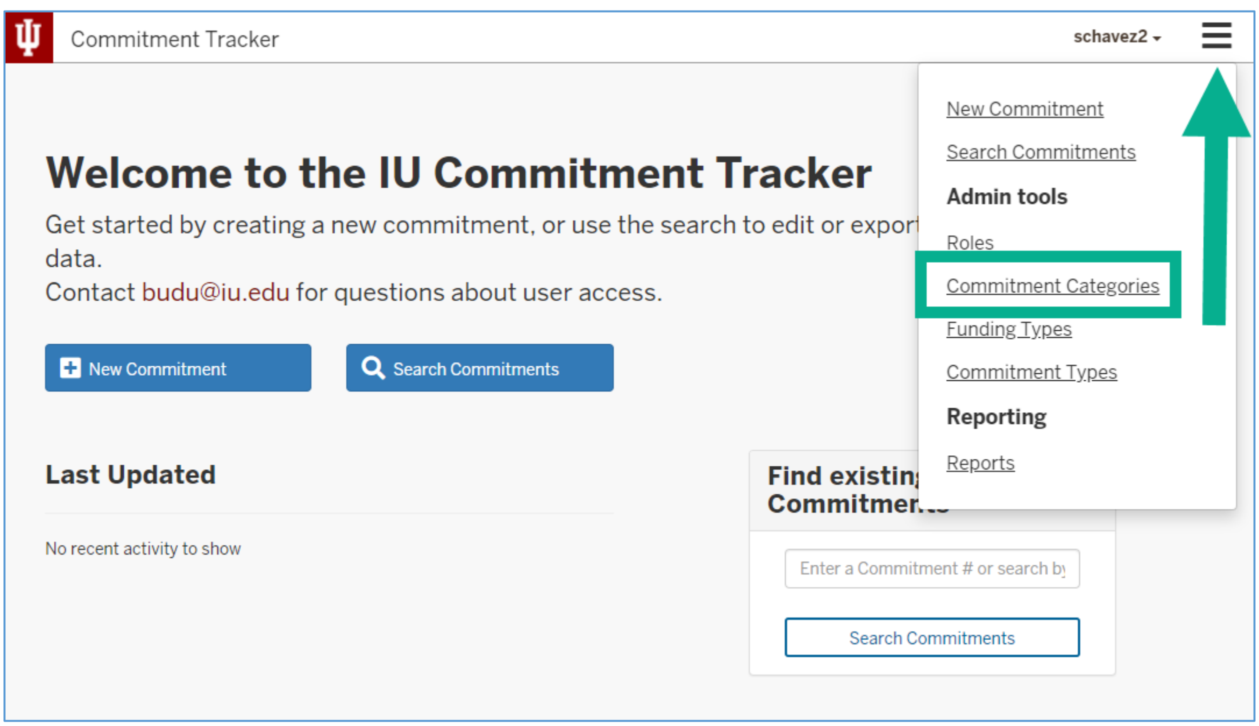
Choose a new role from the **Role Name** drop-down menu or update the user's **Chart** and **Organization** as needed. Activate or inactivate a user by checking or unchecking the box under **Activate**. Click **Submit** to save your changes. Permissions are updated immediately; this action does not route for review.



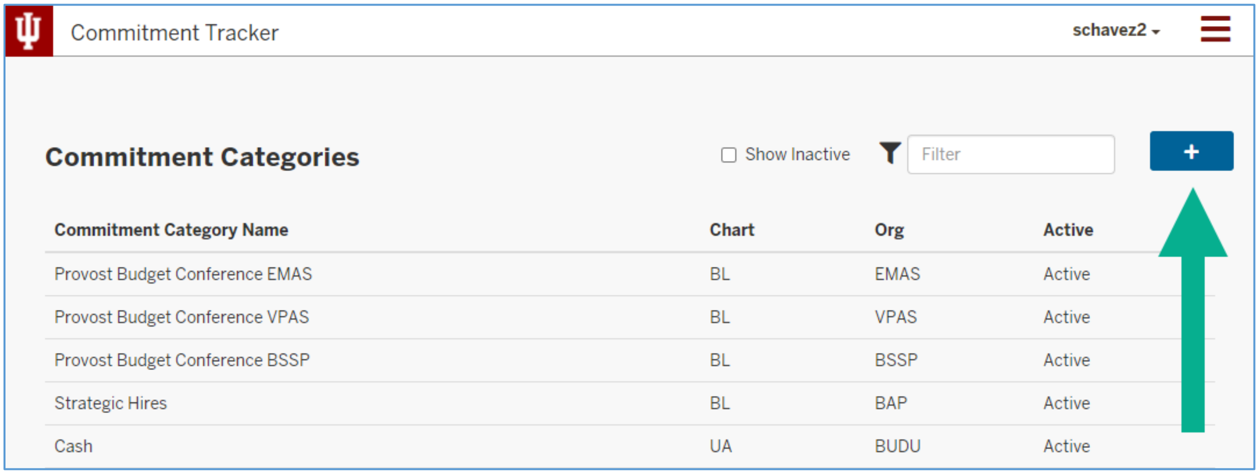
Create Commitment Categories and Subcategories

Organizations can create their own categories and subcategories. Categories are used to locate commitments for the organization and provides more flexibility in reporting.

Categories are created in the Admin menu. Access the Admin menu by clicking the **three horizontal bars** in the upper right-hand corner of the screen, next to your username. Select **Commitment Categories** from the menu.



A list of current commitments is displayed. Click the **plus button** to create a new Category.

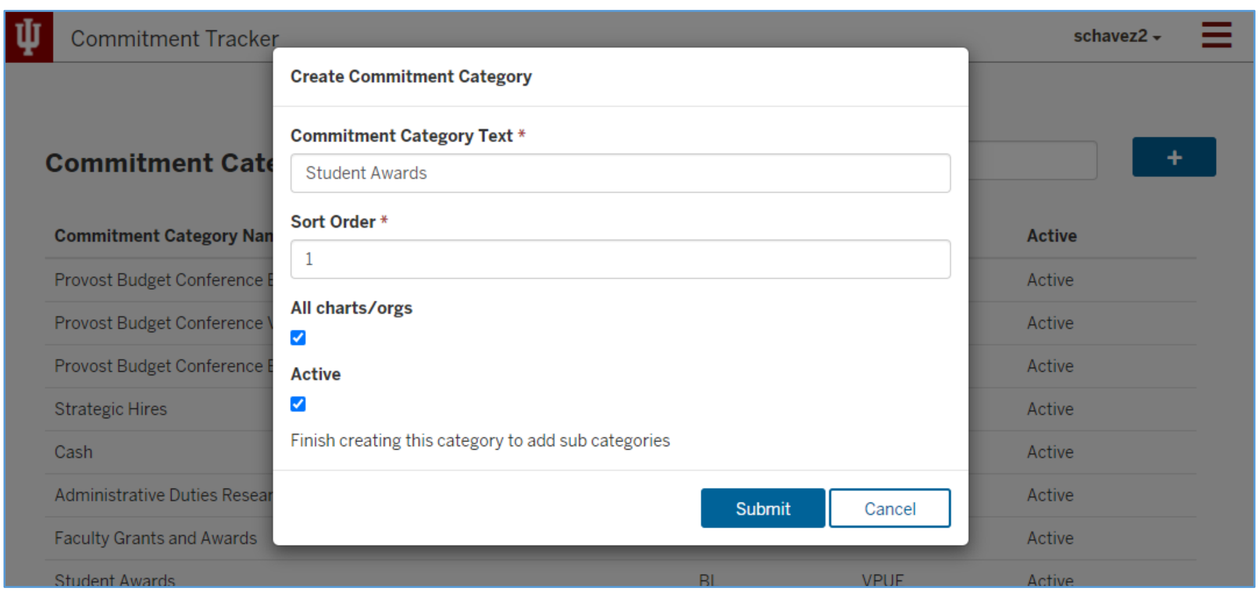


A new window opens where you will define the Category. Enter a descriptive name in the **Commitment Category Text** field. Avoid acronyms if possible. This field allows 50 characters.

In this example, we will create a Category to capture commitments related to Student Awards, so we will enter "Student Awards" in this field. We will use subcategories to further define the types of student award commitments we have made or received.

Next, enter a numeric value in the **Sort Order** field. This dictates the order in which the Category appears when applying it to a commitment or filter. This is the first Category we've created, so we will enter "1" in this field.

Check the box under **All charts/orgs** to make the Category available to all Chart/Orgs to which you have permission.

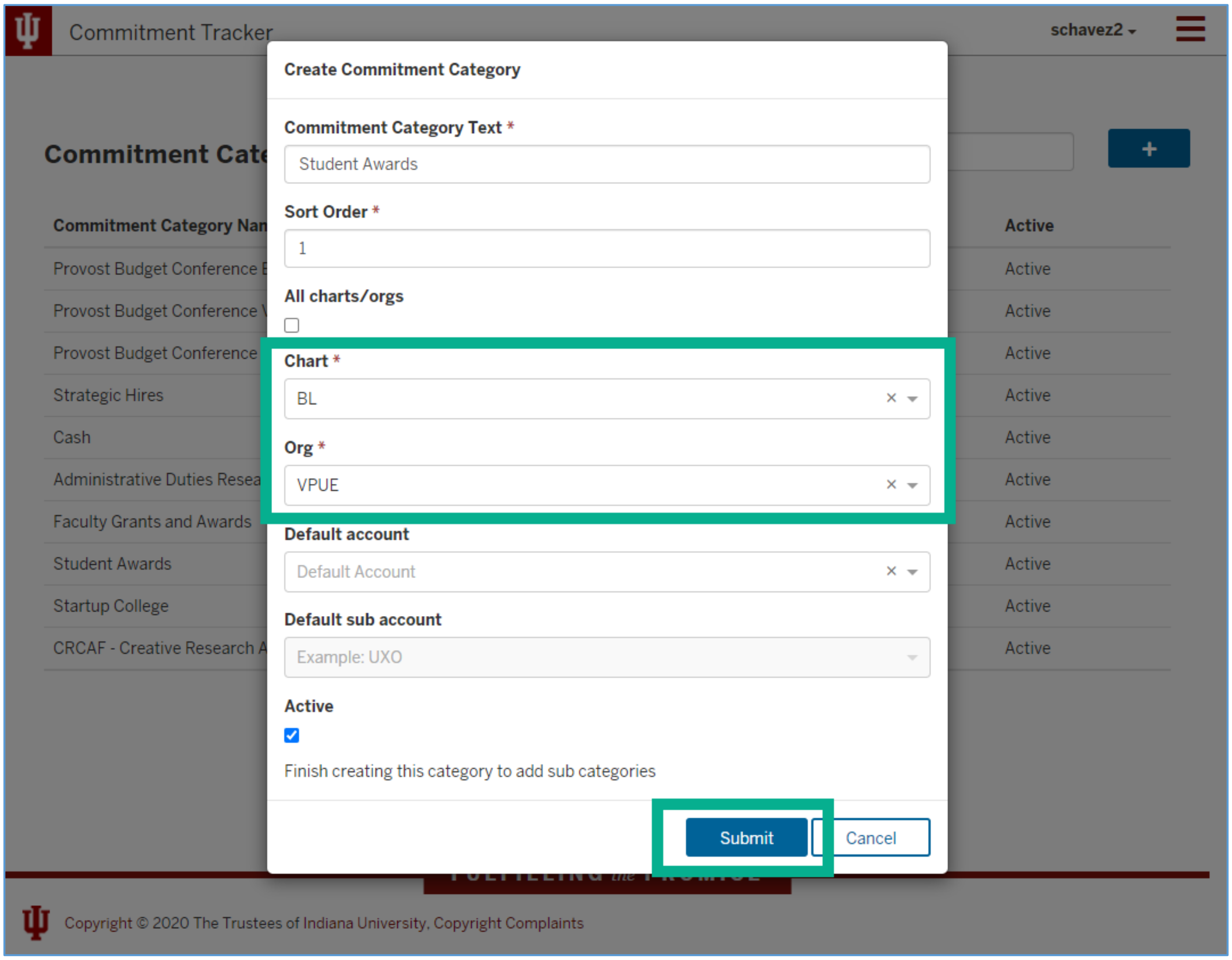


Alternatively, you may apply the Category to a specific Chart and Organization. This may be a better option for users working on behalf of a Responsibility Center or central office.

Select the specific **Chart** and **Organization** that should have access to the Category. In this example we will use BL as our Chart and VPUE, the org code for Undergraduate Education, as our Organization.

The remaining fields are optional. Entering information in the **Default account** and **Default sub account** fields will auto-populate that information on a commitment each time this Category is used.

Click **Submit** to save your work and establish Subcategories, if desired.



Enter a name for the Subcategory in the **Commitment Sub Category** field. Like before, this field allows 50 characters. Avoid using acronyms if possible.

Adjust the **Sort Order** field to reflect where the Subcategory should appear in a drop-down menu. This field defaults to a value of 1. Be sure to update it if entering multiple Subcategories.

Finally, enter account information in the **Default Account** and **Default Sub-Account** fields if desired. Click the **Add** button in the **Actions** column to save the Subcategory and create another. Repeat these steps until all Subcategories are added.

Click **Submit** to save your changes and make the Subcategories available to use.