

CTS Reporting

There are two options for reviewing commitment data: Tableau reporting in CTS itself and a basic report in IUIE. Data in CTS is updated dynamically as new commitments and payments are entered. IUIE data is refreshed nightly and more limited than what is available in CTS.

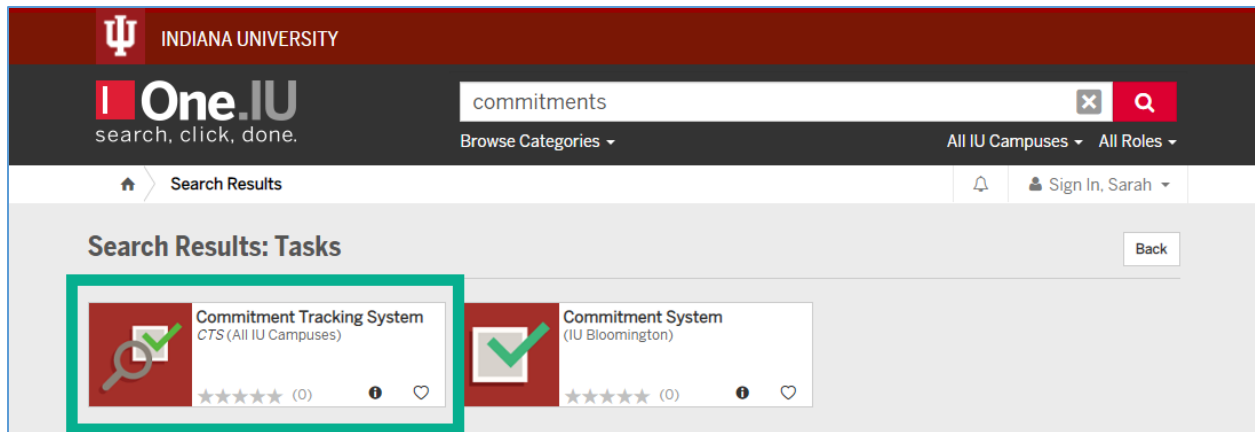
Your ability to view commitments in either environment is driven by your role and Chart/Org association in CTS. If you are not able to view commitments, contact your Org Administrator. Contact your Fiscal Officer if you do not know who the Org Administrator is for your group.

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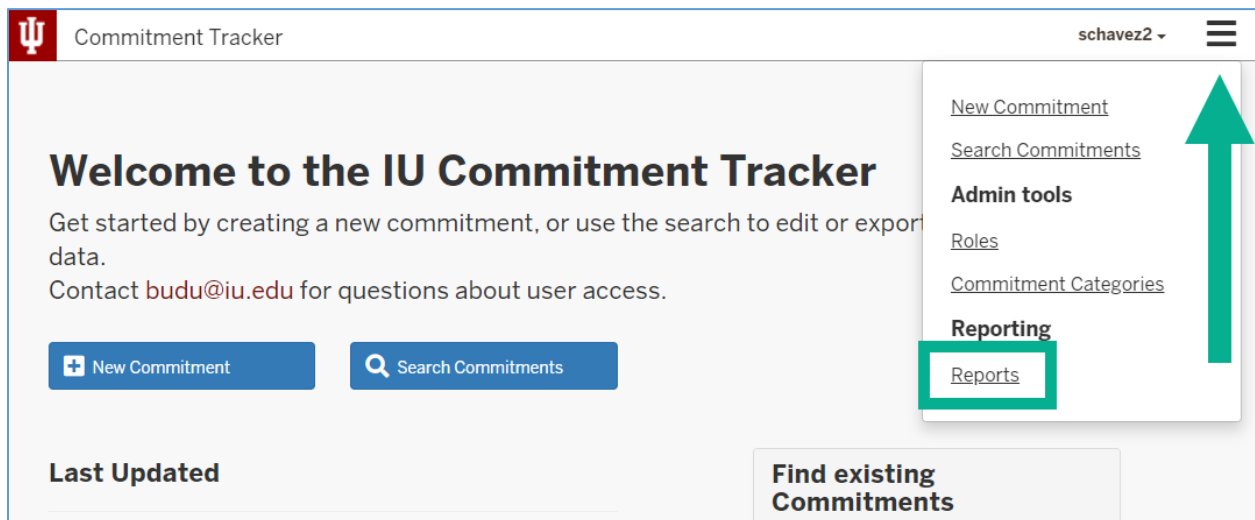
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Tableau in CTS

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



Click the **three horizontal bars** in the upper right-hand corner, then select **Reports**.



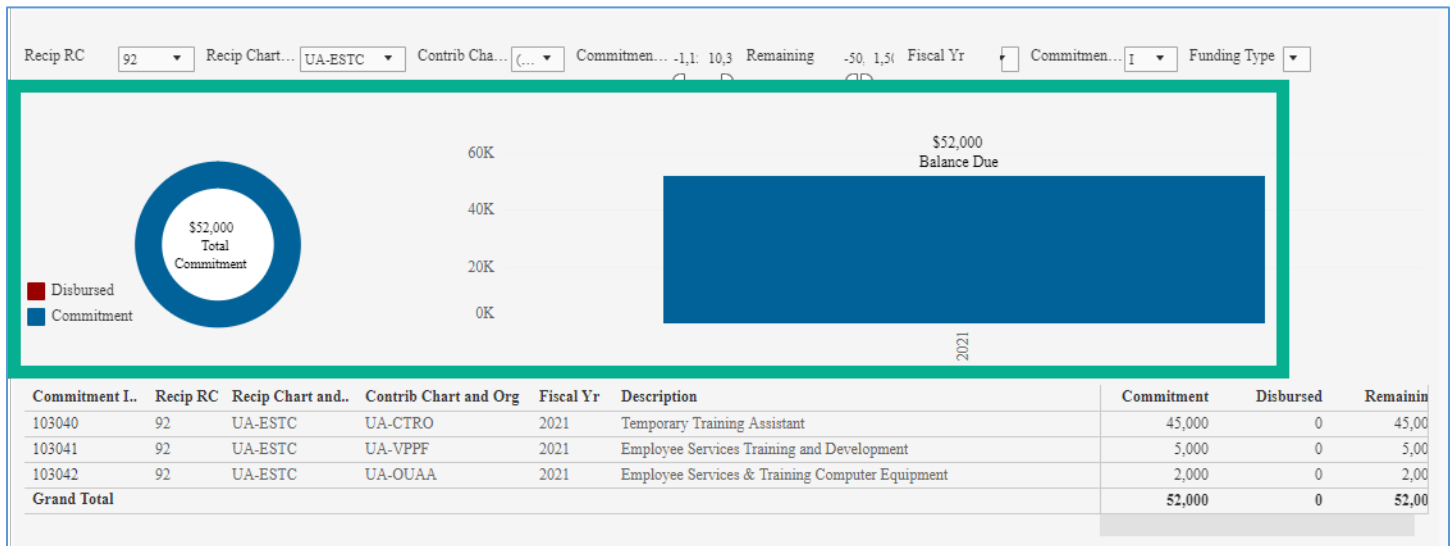
The first time you visit the Reporting section, you may encounter a blank screen. Refresh the page and you will be prompted to sign in to Tableau. The page will refresh after you login.

Embedding Tableau in an application is a new approach. UITS and the University Budget Office are committed to stabilizing and improving the experience through future updates and releases.

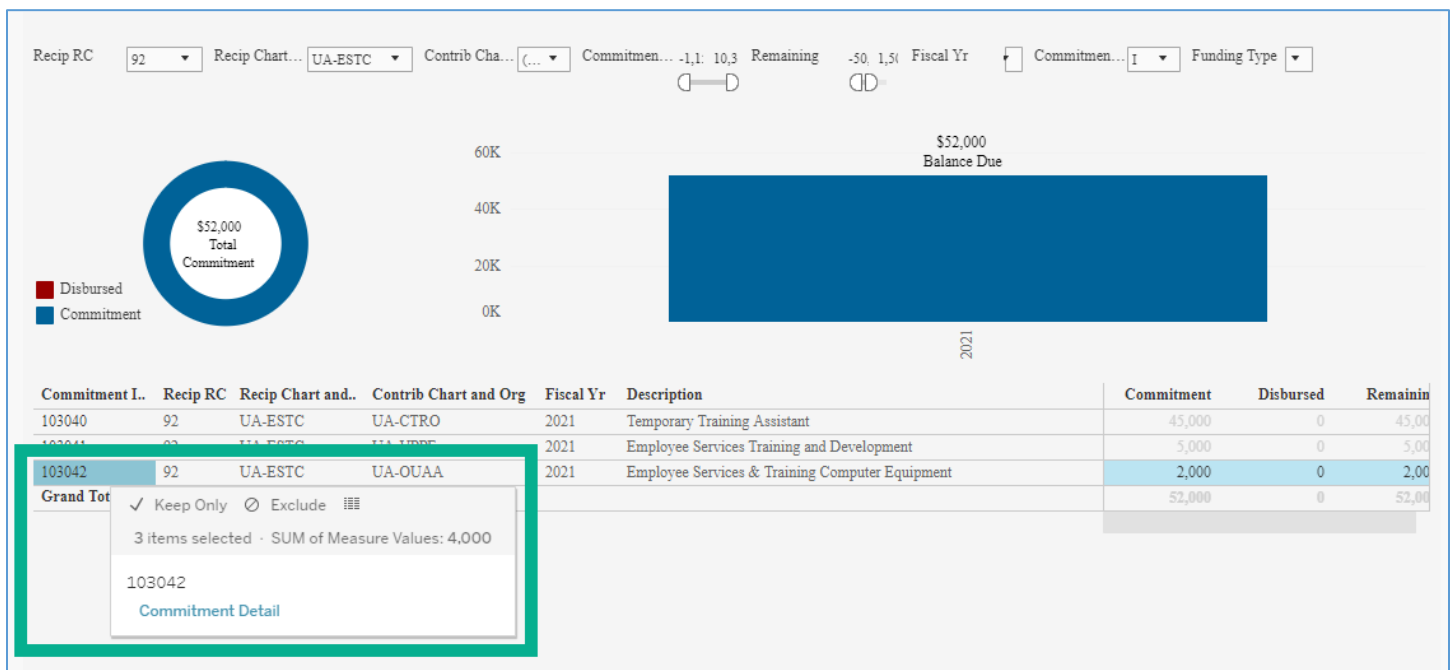
CTS updates and displays commitments from all contributors for which your organization is a recipient for all fiscal years.

The donut chart summarizes total commitments made versus disbursements recorded. Disbursement numbers are driven by payments logged in CTS, meaning the information is not automatically pulled from KFS or another system.

The bar graph to the right reflects the same information broken down on a fiscal year by year basis.



Click on a row, then **Commitment Detail** to open the commitment document in a new window or tab. This window also allows you to exclude an individual commitment from your results, if desired.



Use the parameters at the top of the screen to limit the data returned.

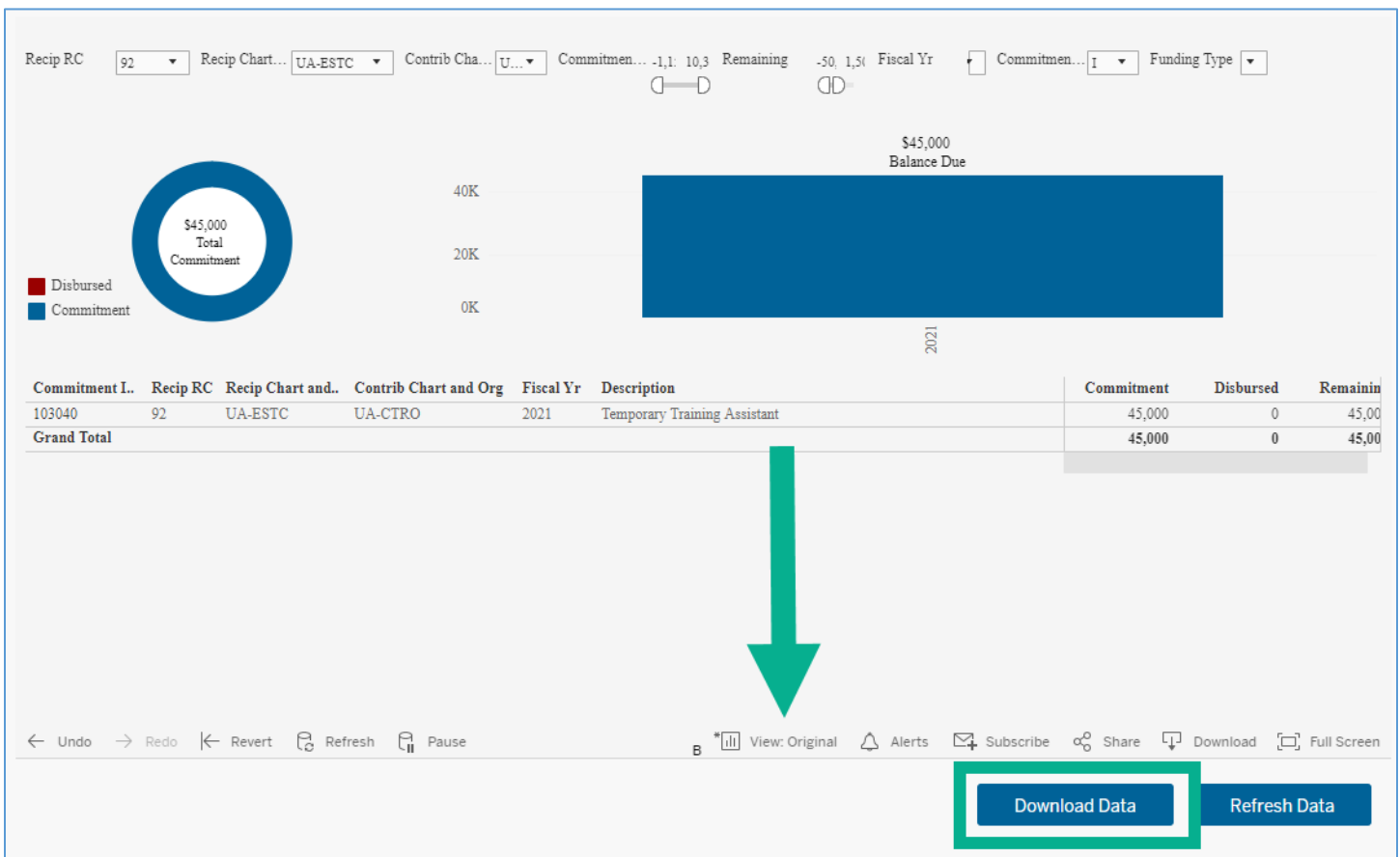
For example, my chart/org affiliation is with the chart and organization UA-ESTC. I want to review commitments where the Office of the University Controller, UA-CTRL, is the contributor. Update the Contributor Chart to reflect the chart/org.

Recip RC: 92 Recip Chart...: UA-ESTC Contrib Cha...: U... Commitmen...: -1,1: 10,3 Remaining: -50, 1,5(Fiscal Yr: Commitmen...: I Funding Type:

\$45,000
Balance Due

40K

Click **Download Data** to export commitment details to Excel. Save your parameters for future use by clicking **View: Original**. Tableau allows you to save multiple views and set a view as your default option so it will appear each time you access Reporting in CTS.



IU Information Environment (IUIE)

Limited commitment data is available in IUIE and can be accessed using the [Basic: Commitment Tracking](#) query.

Enter your chart, RC, and org in the appropriate fields to return a list of commitments made to your organization. Remember to click **Valid Values** to search for a value if you are not sure what to enter.

Basic: Commitment Tracking

Last Refresh Of Referenced Data: unavailable - CTS_COMM_GT ▼

[Security Information](#)
[Report Object Help](#)

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[Specify Parameter Values to Restrict Output](#)

COMM ID
 Commitment Status
 Recipient Chart
 Recipient Resp Center
 Recipient Org
 Award Year
 Contributor Chart
 Contributor Resp Center
 Contributor Org
 Award Account
 Source Account

[Wildcards Allowed](#)

Remember to select the radio button next to All Columns or select the columns you wish to return before clicking Run.

Basic: Commitment Tracking

Last Refresh Of Referenced Data: unavailable - CTS_COMM_GT ▼

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[Instructions](#)

[Specify Parameter Values to Restrict Output](#)

COMM ID
 Commitment Status
 Recipient Chart
 Recipient Resp Center
 Source Account

[Wildcards Allowed](#)

[Include Parameters with Output](#)

☒ Do not Include Parameters with Output
☐ Include Parameters that Have Values
☐ Include All Parameters

[Select Columns to Include](#)

☐ All Columns
☒ Selected Columns

[Include Column Names?](#)

☒ Yes
☐ No

☐ COMM ID
☐ CONTRIB RESP CENTER
☐ COMM TYPE DESC
☐ COMM DATE
☐ DESCRIPTION
☐ CONTRIB ORG
☐ COMM CATEGORY DESC
☐ SOURCE ACCT
☐ CONTRIB CHART
☐ FUNDING TYPE DESC
☐ COMM SUB CATEGORY DESC
☐ SOURCE SUB ACCT