Search for, Edit, and Copy Commitments

This document demonstrates how to search for a commitment which has been entered into CTS, the Commitment Tracking System, edit a commitment if needed, and copy a commitment.

You must be granted access to CTS and have the CTS User or Org Administrator role to view or edit commitments. Contact your Org Administrator to gain access to CTS or have your role updated. Contact your Fiscal Officer if you do not know who the Org Administrator is for your group.

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Search for a Commitment

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

U INDIANA UNIVERSITY		
	commitments	X Q
Search Results	Browse Categories +	All IO Campuses → All Roles →
Search Results: Tasks	_	Back
Commitment Tracking System CTS (All IU Campuses)	Commitment System (IU Bloomington) ★★★★★ (0)	

The last five commitments you entered are displayed on the CTS homepage. **Click a commitment** to view or edit the document.

Alternatively, enter a commitment number or keyword in the **Find existing Commitments** field and click **Search Commitments**. In this example, we will search for all commitments whose Description field contains the word "faculty."

Commitment Tracker	schavez2 -
Welcome to the IU Commit	ment Tracker
Get started by creating a new commitment, or us data.	e the search to edit or export existing commitment
Contact <mark>budu@iu.edu</mark> for questions about user a	ccess.
New Commitment Search Commitments	
	•
Last Updated	Find existing
	Commitments
101621: Visiting faculty salary commitment FY21	faculty
	Search Commitments

CTS returns a list of commitments that you have access to and that meet your search terms. Click the **arrow** next to the commitment number to see additional details.

In the example below, the commitment's total value is \$8,000. Looking at the details, we see that \$4,000 of the commitment was transferred to account 2228184 in fiscal year 2018.

Commit	mmitment Tracker							New Com	mitment	Q Search Co	mmitments	e schave
Description				Status	s			F	iscal Year			
faculty				Statu	us			•	Fiscal Year			•
Recipient Cl	hart	F	Recipient	t Responsibil	lity Center			Recipient Org				
BL	>	× •	04-ARTS	S & SCIENCE	S				-	CHEM		~
Q Searc	ch clear Description	Sta	C tus C	Contributor Chart	Contributor Org	Recipient Chart	Recipient Org	Recipient RC	Awardee	Commitment Date	t Amount	Balance
 Q. Searce # ↓ <li< th=""><th>ch clear Description Summer Faculty Fellows</th><th>Sta</th><th>tus C B</th><th>Contributor Chart</th><th>Contributor Org ARSD</th><th>Recipient Chart BL</th><th>Recipient Org HIST</th><th>Recipient RC</th><th>Awardee SESANDW</th><th>Commitment Date</th><th>t Amount \$8,000.00</th><th>Balance \$4,000.00</th></li<>	ch clear Description Summer Faculty Fellows	Sta	tus C B	Contributor Chart	Contributor Org ARSD	Recipient Chart BL	Recipient Org HIST	Recipient RC	Awardee SESANDW	Commitment Date	t Amount \$8,000.00	Balance \$4,000.00
Q Searc	ch clear Description Summer Faculty Fellows	Sta ship A Fiscal Year	tus C	Contributor Chart BL Award Accou	Contributor Org ARSD	Recipient Chart BL Award Account	Recipient Org HIST t Type	Recipient RC 4A Award Sub	Awardee SESANDW Account	Commitment Date 07/01/2017 Amour	t Amount \$8,000.00 nt E	Balance \$4,000.00 Balance
 Q Searce # 44766 	ch clear Description Summer Faculty Fellows 2	Sta ship A Fiscal Year	tus C B	Contributor Chart BL Award Accou	Contributor Org ARSD unt	Recipient Chart BL Award Account	Recipient Org HIST t Type	Recipient RC 4A Award Sub	Awardee SESANDW Account	Commitment Date 07/01/2017 Amour \$4,000	t Amount \$8,000.00 ht E	Balance \$4,000.00 Balance 50.00
 Q Searce # 44766 	ch clear Description Summer Faculty Fellows 2 2	Sta ship A Fiscal Year 2018 2019	tus C B 2	Contributor Chart 3L Award Accou 2228184	Contributor Org ARSD unt	Recipient Chart BL Award Account	Recipient Org HIST t Type	Recipient RC 4A Award Sub	Awardee SESANDW o Account	Commitment Date 07/01/2017 Amoun \$4,000 \$4,000	t Amount \$8,000.00 nt E 0.00 \$	Balance \$4,000.00 Balance \$0.00 \$4,000.00
 Q Searce # 44766 ▶ 46888 	ch clear Description Summer Faculty Fellows 2 2 2 Summer Faculty Fellows	Sta ship A Fiscal Year 2018 2019	tus C B 2 B	Contributor Chart BL Award Accou 2228184 BL	Contributor Org ARSD unt ARSC	Recipient Chart BL Award Account NA BL	Recipient Org HIST Type BI	Recipient RC 4A Award Sub	Awardee SESANDW Account	Commitment Date 07/01/2017 Amour \$4,000 \$4,000 07/01/2017	t Amount \$8,000.00 ht E 0.00 \$ 0.00 \$ \$16,000.00	Balance \$4,000.00 Balance \$0.00 \$4,000.00 \$4,000.00 \$16,000.00

Advanced Search

Apply filters to your search results to narrow the scope of your search. For example, select 2021 from the **Fiscal Year** drop-down menu to see commitments entered for FY21.

Click **Search** to apply a filter.

Descrip	on			Statu	s				Fiscal Year				
facult				Stat	us			-	× 2021			× -	
Recipie	t Chart		Recipie	Recipient Responsibility Center						Recipient Org			
BL		× 👻	04-AR	TS & SCIENCE	S				~	CHEM		-	
Q S	arch	clear											
Q S #	arch	clear	Status	Contributor Chart	Contributor Org	Recipient Chart	Recipient Org	Recipient	RC Awardee	Commitment Date	Amount	Balance	
Q S # ▶ 100	Descriptic 78 Wu, Cynth	clear n	Status A	Contributor Chart BL	Contributor Org ARSD	Recipient Chart BL	Recipient Org GNDR	Recipient	RC Awardee	Commitment Date 04/26/2018	Amount \$16,000.00	Balance \$16,000.00	
Q S # ▶ 100 ▶ 1016	Description 78 Wu, Cynth 21 Visiting fao	clear m ia- GNDR/ASAM :ulty salary com	Status A A	Contributor Chart BL BL	Contributor Org ARSD ARSC	Recipient Chart BL BL	Recipient Org GNDR CLAS	Recipient 4A 4A	RC Awardee	Commitment Date 04/26/2018 07/01/2020	Amount \$16,000.00 \$40,000.00	Balance \$16,000.00 \$40,000.00	

The search screen offers the most used filters as default options. Add additional filters by clicking + add a filter, located under the **Recipient Chart** field.

Ψ	Сс	ommitr	ment Tracker						New Co	ommitment	Q Search Cor	nmitments	e schavez2 -	Ξ
	De	escription			Statu	S				Fiscal Year				
	1	faculty			Stat	us			•	× 2021			× •	
	Recipient Chart		Recipient Responsibility Center						Recipient Org					
	E	3L	× •	04-A	RTS & SCIENCE	S				~	CHEM		~	
		Q Search	Description	Status	Contributor Chart	Contributor Org	Recipient Chart	Recipient Org	Recipient	RC Awardee	Commitment Date	Amount	Balance	
	►	100778	Wu, Cynthia- GNDR/ASAM	А	BL	ARSD	BL	GNDR	4A		04/26/2018	\$16,000.00	\$16,000.00	
	►	101621	Visiting faculty salary com	А	BL	ARSC	BL	CLAS	4A		07/01/2020	\$40,000.00	\$40,000.00	
	2 Ma	tching Com	mitments				1					<u> ■ Expor</u>	t results to Excel	

A new drop-down menu appears which contains a list of all fields available on the commitment document. Select an option to define and apply that filter.

For example, I wish to review a list of commitments which list the College of Arts and Sciences as the Contributor Org. Select **Contributor Org** from the drop-down list, then define the following fields. Notice it is not necessary to define the Org field; we can search at the RC level.

Description	Status		Fiscal Year	
Description	Status	•	Fiscal Year	•
Recipient Chart	Recipient Responsibility Ce	nter		Recipient Org
BL ×	O4-ARTS & SCIENCES		-	CHEM 👻
Filter Type	Chart	Responsibility Center	Org	
Contribution org		4Å-ARTS & SCIENCES - COLLEGE DIVISION × 4B-ARTS & SCIENCES - MEDIA × 4C-ARTS & SCIENCES - GLOBAL & INTERNATIONAL × 40-ARTS & SCIENCES - ART & DESIGN	UT LEAT	
+ add another filter				

Remove a filter at any time by clicking **x Remove this filter**.

ПГ New Commitment **Q** Search Commitments Schavez2 -Commitment Tracker Ξ Description Status Fiscal Year Description Status Fiscal Year --**Recipient Chart Recipient Responsibility Center Recipient Org** × -**04-ARTS & SCIENCES** CHEM BL Filter Type Chart **Responsibility Center** Org Remove this filter Contributor Org × – BL × -CHEM × -4A-ARTS & SCIENCES - COLLEGE DIVISION × 4B-ARTS & SCIENCES - MEDIA 4C-ARTS & SCIENCES - GLOBAL & INTERNATIONAL ~~~~~~~~~ × +0La h.eh.an seach pp. t..... b. h. AS / BL / E JN LL_PL/0,01,201, 3,0,30, 40, 3 A > > >BI ▶ 40133 Summer Salary - Director I... A BL ARSD BL 4A SISHAW 07/01/2017 \$42,695.00 \$20,000.00 ▶ 40143 Startup_ Rob Deruyter ARSD PHYS 4A DERUYTER 07/01/2016 \$335,525.00 \$295,525.00 Α BL BL 40145 Admin Res Spt - Chair_Mat... A BL ARSD BL CLAS 4A MRCHRIST 07/01/2017 \$45,500.00 \$45,500.00 ► ARSD BL 4A 40177 Ancient Studies - ongoing p... A BL CLAS 07/01/2017 \$32.000.00 \$26.000.00 1 2 3 4 5 Next Export results to Excel 956 Matching Commitments

The bottom of the search results page also offers an export link. Click **Export results to Excel** to download a CSV file which contains full commitment document details for every commitment returned in your search.

Edit a Commitment

After locating the commitment you need to edit, open the document in a new window or tab by clicking in that commitment's **row**.

	ion			Statu	IS				Fiscal Year			
facult				Stat	tus			-	× 2021			× 👻
Recipie	t Chart	hart Recipient Responsibility Center			Recipient Org							
BL		× -	04-A	RTS & SCIENCE	ES				v	CHEM		-
#	Description		Status	Contributor Chart	Contributor Org	Recipient Chart	Recipient Org	Recipient	RC Awardee	Commitment Date	Amount	Balance
# ► 100	Description	- GNDR/ASAM	Status A	Contributor Chart BL	Contributor Org ARSD	Recipient Chart BL	Recipient Org GNDR	Recipient	RC Awardee	Commitment Date	Amount \$16,000.00	Balance \$16,000.00

Record a Commitment Distribution

Fields marked with an asterisk (*) are required.

In the Amounts section, click on the Fiscal Year in which the distribution was made.

Description *					
Visiting faculty sala	ry commitment FY21				
lecipient					expand 🗸
Recipient chart *	Recipient	responsibility center		Recipient organi	zation *
BL	× 👻 4A-ARTS	S & SCIENCES - COLLEGE DIVISION	× -	CLAS	× -
Select a year to view	or edit.				collapse ٨
Fiscal Year	Award Account	Sub Account	Amount	Balance	
			\$40,000,00	\$40,000.00	
2021	1025202		\$ 10,000.00		

A new window opens. In the **Balance** tab, enter the amount of the distribution in the **New KFS Distribution** field, followed by the KFS document number in the **KFS Doc #** field. You may also add a payment date, if desired.

In this example, \$15,000 was distributed using Transfer of Funds document 88632514. Click **Add** to save the distribution to the commitment.

Щ Co	mmitment Tra	çker		schavez2 -
		Edit Commitment Entry		×
Со	mmitr	Fiscal year 2021		ient Number 101621
Cont	ributor	Balance: \$40,000.00	Amount: \$40,000.00	expand 💙
Desc	ription *	Viewing distributions	View revisions	_
VIS	inting faculty salary	New KFS Distribution	KFS Doc # *	
Recip	oient	\$15,000.00	88632514	expand 💙
Reci	pient chart *	Payment Date		nt organization *
BL		Select a Date	Add	× +
<u>Amor</u>	unts	Previous Pavments		collapse 🔨
Fisc	ct a year to view or cal Year			ice
202	21	There are no payments for this entr	y yet.	
				_
	Add a Year		Delete Ent	ry
	Adula Tear			

The balance of the commitment updates, and a direct link to the KFS document is created in the **Previous Payments** section of the window.

ψ	Commitment Tra	çker		schavez2 -
		Edit Commitment Entry	×	
	Commitm	Fiscal year 2021		ient Number 101621
<u>(</u>	Contributor	Balance: \$25,000.00 Viewing distributions	Amount: \$40,000.00 View revisions	expand 🗸
	Visiting faculty salary	New KFS Distribution	KFS Doc # *	
Ē	ecipient	\$0.00	KFS Doc #	expand 🏏
	Recipient chart *	Payment Date		nt organization *
	BL	Select a Date	Add	× *
4	mounts Select a year to view or	Previous Payments		collapse 🛧
	Fiscal Year	\$15,000.00 on 09/08/2020 by schavez2	- <u>Doc # 88632514</u> edit remove	1 ce
4	Add a Year		Delete Entry	collapse 🔨

Extend a Commitment

Fields marked with an asterisk (*) are required.

Extend a commitment by navigating to the **Recipient** section of the document and updating the **Expiration Date** field.

Commitment	Iracker				schavezz +
Commit	ment	;	(Commitment N	lumber 1016
ontributor					expand 💙
Description *					
Visiting faculty sa	alary commitm	ent FY21			
ecipient					collapse ٨
Recipient chart *		Recipient responsibility center		Recipient orga	nization *
BL	× -	4A-ARTS & SCIENCES - COLLEGE DIVISION	× 👻	CLAS	× -
Username of recip	ient	Group	IUF Acco	unt Number	
	ame of corr	(Optional) Is this going to a specific department or g	(Option	al) The IUF accour	nt number asso
(Optional) Userna					
Start Date *		Expiration Date *			

Select a new expiration date using the calendar widget or enter a date in the format: MM/DD/YYYY. In this example, we have extended the commitment life by one fiscal year.

If extending the commitment into additional fiscal years, you must enter award information in the **Amounts** section of the document. Review the Enter a Commitment document for guidance completing these fields.

While not required, we strongly encourage you to attach supporting documentation explaining the reason/approval of the extension.

Once you made your changes click **Save** at the bottom of the page to save your work.

Recipient chart *		Recipient responsi	bility center			Recipient organiza	ation *
BL	× -	04-ARTS & SCIEN	CES		× -	CLAS	× -
Jsername of recipie	ent	Group			IUF Acco	unt Number	
(Optional) Usernan	ne of corr	(Optional) Is this g	going to a specif	c department or g	(Option	al) The IUF account n	umber asso
Start Date *		Expiration Date *					
07/01/2020	×	06/30/2022	×				
nounts							collapse ٨
Select a year to view	or edit.						
Fiscal Year	Award A	ccount	Sub Account	Amount		Balance	
2021	1025202			\$40,000.00	0	\$25,000.00	
2022	1025202			\$40,000.00	0	\$40,000.00	
				Total: \$80,000.0	0	\$65,000.00	
Attached doct	uments:	ent visy.		Last Updated: schavez2 - 09/08/20;	20, 01:12p	m	~~~~
Classical stud	iles commun	CITEAISA	^	Status *			
Classical stud			~				× –
Classical stud	lies commitm	ent - UPDATED.xlsx	^	Active			

Update Commitment Amount Details

Fields marked with an asterisk (*) are required.

Navigate to the **Amounts** section of the commitment and click the **fiscal year** you wish to update.

Description *							
Visiting faculty sala	ry commitme	ent FY21					
Recipient							expand 🗸
Recipient chart *		Recipient res	Recipient responsibility center			Recipient organization *	
BL	× 👻	04-ARTS &	SCIENCES		× 👻	CLAS	× -
mounts							collapse ٨
Select a year to view Fiscal Year	or edit. Award A	ccount	Sub Account		Amount	Balance	
2021	1025202				\$40,000.00	\$25,000.00	
2022	1025202				\$40,000.00	\$40,000.00	
				Total:	\$80,000.00	\$65,000.00	

A new window opens. In the Amounts tab, click Update Fiscal Year Detail.

Ψ	Commitment Trac	cker		schavez2 -
		Edit Commitment Entry		×
C	Commitm	Fiscal year 2022		ient Number 101621
<u>C</u>	ontributor	Balance: \$40,000.00	Amount: \$40,000.00	expand 💙
	Description *	View distributions	Viewing revisions	
R	ecipient	Update Fis	cal Year Detail	expand 🗸
	Recipient chart *	Commitment Amount History		nt organization * × 👻
<u>A</u>	mounts Select a year to view or	\$40,000.00 on 09/08/2020, 01:14pm by Initial commitment	schavez2	collapse 🔨
	Fiscal Year			ice
	2021			00.00
	2022		Delete Entry	000.00
			Total: \$80,000.00	\$65,000.00

You are now able to update the fields originally entered in the Amounts section of the commitment document. Make the necessary changes and enter an explanation for the changes in the **Reason for Revision** field. This field offers 120 characters. Click **Save revision** to save your changes.

U Commitment Tra	Fiscal year 202	2			schavez2 -
Commitr	Balance: \$40,000.00 View distributions		Amount: \$40,000 Viewing revisions	0.00	ment Number 101621
Contributor	Revise this commitment a	mount			expand 🌱
Description * Visiting faculty salar	New Amount \$35,000.00	Reason fo	r Revision * commitment by \$5,000 pe	er updated a	
Recipient	Recipient award account		Recipient award sub a	ccount	expand 💙
Recipient chart *	1025202	× -	Example: UXO	× -	ent organization *
BL	Account Link Recipient award object c	ode	Recipient award sub o	bject code	5 × •
Amounts	9915		СА		collapse 🔨
Select a year to view o Fiscal Year 2021	Save revision Cancel				.000.00

The Amount tab reloads and reflects your changes, as well as a running list of revisions to the commitment.

U Commitment Trag	çker		schavez2 -
	Edit Commitment Entry		×
Commitm	Fiscal year 2022		tent Number 101621
Contributor Description *	Balance: \$35,000.00 View distributions	Amount: \$35,000.00 Viewing revisions	expand 🛩
Visiting faculty salary	Update	e Fiscal Year Detail	
Recipient			expand 🗸
Recipient chart *	Commitment Amount History		nt organization *
Amounts	\$35,000.00 on 09/08/2020, 01:29pr reduced commitment by \$5,000 per	n by schavez2 r updated agreement	collapse 🔨
Fiscal Year	\$40,000.00 on 09/08/2020, 01:14pr	n by schavez2	ice
2021	Initial commitment		00.00
	L		00.00
		Delete Entr	У
Add a Year			

Copy a Commitment

Locate the commitment you wish to copy and scroll to the bottom of the commitment document. Click **Duplicate this Commitment**.

	schavez2 -
Commitment	Commitment Number 10162
ontributor	expand 🌱
Description *	
CLAS visiting faculty salary commitment FY21	
ecipient	expand 🗸
ecipient Recipient chart * Recipient chart *	expand ~
ecipient Recipient chart * Recipient responsibility cen	expand ✓ tter Recipient organization * Last Updated:
ecipient Recipient chart * Recipient responsibility cen Attached document:	expand ✓ nter Recipient organization * Last Updated: schavez2 - 09/08/2020, 04:37pm
Recipient chart * Recipient responsibility cen Attached document: Classical studies commitment.xlsx ×	tter Recipient organization * Last Updated: schavez2 - 09/08/2020, 04:37pm Status *

CTS copies the commitment to a new document and logs a comment referencing the original commitment number. Enter **commitment start** and **expiration dates** in the Contributor and Recipient sections. Review all information before clicking **Save** and creating the new commitment.

Select a year to vie	w or edit.				
Fiscal Year	Award Account	Sub Account	Amount	Balance	
2021	1025202		\$40,000.00	\$40,000.00	
Add a Year					
tachments					collapse 🔨
Add Attachments		Comm	ents		
Try dropping	some files here, or click to select	files to upload.	from commitment 101622		
		· · · ·			
You haven't	attached any documents to this c	ommitment Status	*		
You haven't yet	attached any documents to this c	commitment Status	*	ß	× *
You haven't yet	attached any documents to this c	commitment Status Activ	*		× *
You haven't yet	attached any documents to this c	rommitment Status Activ	* 9		× •

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