

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.

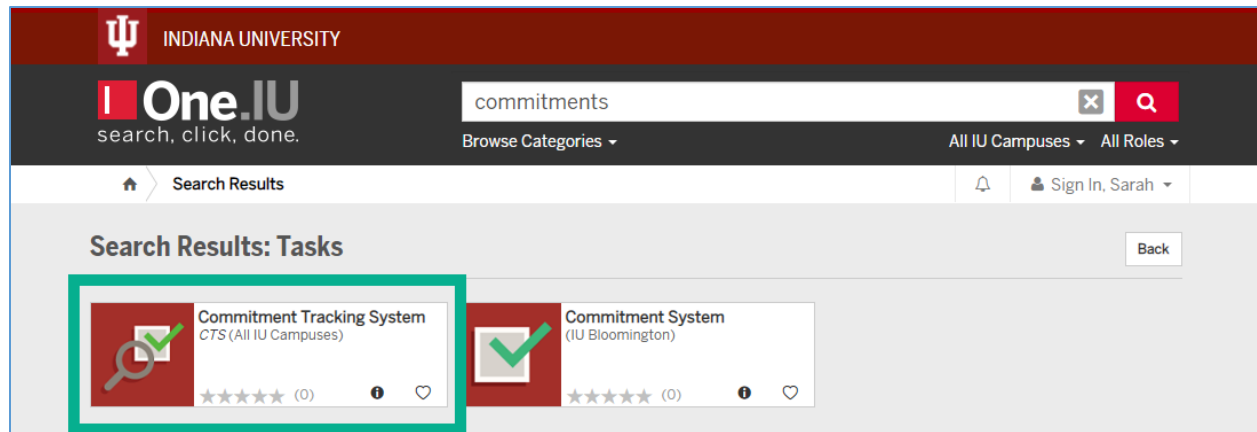
You must be granted access to CTS and have the CTS User or Org Administrator role to view or edit commitments. Contact your Org Administrator to gain access to CTS or have your role updated. Contact your Fiscal Officer if you do not know who the Org Administrator is for your group.

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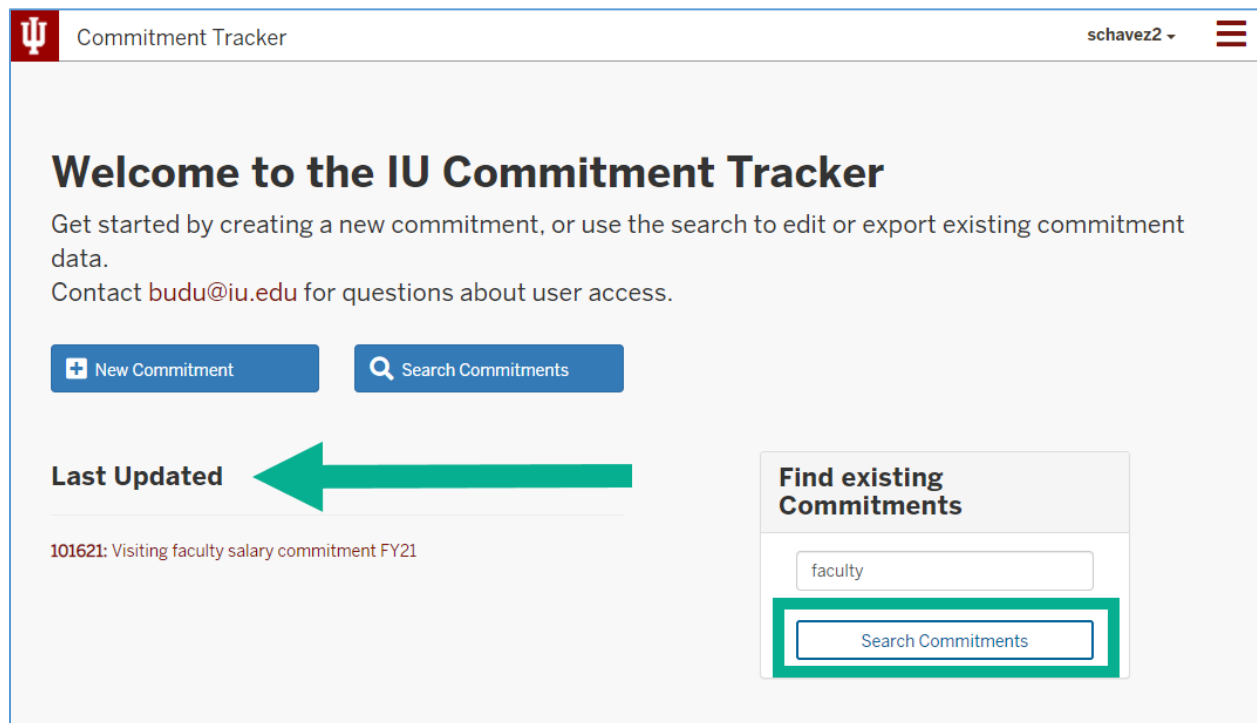
Search for a Commitment

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



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.”



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.

Commitment Tracker

Description: faculty Status: Status Fiscal Year: 2021

Recipient Chart: BL Recipient Responsibility Center: Q4-ARTS & SCIENCES Recipient Org: CHEM

+ add a filter

Search **clear**

#	Description	Status	Contributor Chart	Contributor Org	Recipient Chart	Recipient Org	Recipient RC	Awardee	Commitment Date	Amount	Balance
▶ 100778	Wu, Cynthia- GNDR/ASAM ...	A	BL	ARSD	BL	GNDR	4A		04/26/2018	\$16,000.00	\$16,000.00
▶ 101621	Visiting faculty salary com...	A	BL	ARSC	BL	CLAS	4A		07/01/2020	\$40,000.00	\$40,000.00

2 Matching Commitments [Export 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.

Commitment Tracker

Description: Description Status: Status Fiscal Year: Fiscal Year

Recipient Chart: BL Recipient Responsibility Center: Q4-ARTS & SCIENCES Recipient Org: CHEM

Filter Type: Contributor Org

Chart: BL

Responsibility Center: 4A-ARTS & SCIENCES - COLLEGE DIVISION

Org: CHEM **Remove this filter**

+ add another filter

Search **clear**

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

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.

Commitment Tracker

New Commitment Search Commitments schavez2

Description
Description

Status
Status

Fiscal Year
Fiscal Year

Recipient Chart
BL

Recipient Responsibility Center
04-ARTS & SCIENCES

Recipient Org
CHEM

Filter Type
Contributor Org

Chart
BL

Responsibility Center
4A-ARTS & SCIENCES - COLLEGE DIVISION
4B-ARTS & SCIENCES - MEDIA
4C-ARTS & SCIENCES - GLOBAL & INTERNATIONAL

Org
CHEM

Remove this filter

#	Description	Status	Contributor Chart	Contributor Org	Recipient Chart	Recipient Org	Recipient RC	Awardee	Commitment Date	Amount	Balance
40133	Summer Salary - Director I...	A	BL	ARSD	BL	BI	4A	SISHAW	07/01/2017	\$42,695.00	\$20,000.00
40143	Startup_ Rob Deruyter	A	BL	ARSD	BL	PHYS	4A	DERUYTER	07/01/2016	\$335,525.00	\$295,525.00
40145	Admin Res Spt - Chair_Mat...	A	BL	ARSD	BL	CLAS	4A	MRCHRIST	07/01/2017	\$45,500.00	\$45,500.00
40177	Ancient Studies - ongoing p...	A	BL	ARSD	BL	CLAS	4A		07/01/2017	\$32,000.00	\$26,000.00

956 Matching Commitments

1 2 3 4 5 Next

[Export results to Excel](#)

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**.

Commitment Tracker

New Commitment Search Commitments schavez2

Description
faculty

Status
Status

Fiscal Year
2021

Recipient Chart
BL

Recipient Responsibility Center
04-ARTS & SCIENCES

Recipient Org
CHEM

+ add a filter

Search clear

#	Description	Status	Contributor Chart	Contributor Org	Recipient Chart	Recipient Org	Recipient RC	Awardee	Commitment Date	Amount	Balance
100778	Wu, Cynthia- GNDR/ASAM ...	A	BL	ARSD	BL	GNDR	4A		04/26/2018	\$16,000.00	\$16,000.00
101621	Visiting faculty salary com...	A	BL	ARSC	BL	CLAS	4A		07/01/2020	\$40,000.00	\$40,000.00

2 Matching Commitments

1

[Export results to Excel](#)

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.

Contributor
expand

Description *
Visiting faculty salary commitment FY21

Recipient
expand

Recipient chart *
BL

Recipient responsibility center
4A-ARTS & SCIENCES - COLLEGE DIVISION

Recipient organization *
CLAS

Amounts
collapse

Select a year to view or edit.

Fiscal Year	Award Account	Sub Account	Amount	Balance
2021	1025202		\$40,000.00	\$40,000.00

Add a Year

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.

Commitment Tracker
schavez2

Commitment

Contributor
Description *
Visiting faculty salary

Recipient
Recipient chart *
BL

Amounts
Select a year to view or
Fiscal Year
2021

Edit Commitment Entry

Fiscal year 2021

Balance: \$40,000.00
Viewing distributions

Amount: \$40,000.00
View revisions

New KFS Distribution
\$15,000.00

KFS Doc # *
88632514

Payment Date
Select a Date

Add

Previous Payments
There are no payments for this entry yet.

Delete Entry

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

Edit Commitment Entry

Fiscal year 2021

Balance: \$25,000.00
Viewing distributions

Amount: \$40,000.00
View revisions

New KFS Distribution

\$0.00

KFS Doc # *

KFS Doc #

Payment Date

Select a Date

Add

Previous Payments

\$15,000.00 on 09/08/2020 by schavez2 - [Doc # 88632514](#) [edit](#) [remove](#)

Delete Entry

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 Tracker

schavez2

Commitment

Commitment Number 101621

Contributor

Description *

Visiting faculty salary commitment FY21

Recipient

Recipient chart *

BL

Recipient responsibility center

4A-ARTS & SCIENCES - COLLEGE DIVISION

Recipient organization *

CLAS

Username of recipient

(Optional) Username of corr

Group

(Optional) Is this going to a specific department or g

IUF Account Number

(Optional) The IUF account number assc

Start Date *

07/01/2020

Expiration Date *

06/30/2021

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
collapse ^

Recipient chart *
BL x

Recipient responsibility center
04-ARTS & SCIENCES x

Recipient organization *
CLAS x

Username of recipient
(Optional) Username of corr

Group
(Optional) Is this going to a specific department or gi

IUF Account Number
(Optional) The IUF account number assc

Start Date *
07/01/2020 x

Expiration Date *
06/30/2022 x

Amounts
collapse ^

Select a year to view or edit.

Fiscal Year	Award Account	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

Attached documents:

Classical studies commitment.xlsx x

Classical studies commitment - UPDATED.xlsx x

Last Updated:
schavez2 - 09/08/2020, 01:12pm

Status *
Active x

Save

Cancel

Duplicate this Commitment

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.

Contributor
expand

Description *
Visiting faculty salary commitment FY21

Recipient
expand

Recipient chart *
BL

Recipient responsibility center
04-ARTS & SCIENCES

Recipient organization *
CLAS

Amounts
collapse

Select a year to view or edit.

Fiscal Year	Award Account	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

Add a Year

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

Commitment Tracker
schavez2

Commitment

Contributor
Description *
Visiting faculty salary

Recipient
Recipient chart *
BL

Amounts
Select a year to view or edit.
Fiscal Year
2021
2022

Edit Commitment Entry

Fiscal year 2022
Balance: \$40,000.00
View distributions
Amount: \$40,000.00
Viewing revisions

Update Fiscal Year Detail

Commitment Amount History
\$40,000.00 on 09/08/2020, 01:14pm by schavez2
Initial commitment

Delete Entry

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.

The screenshot shows the 'Commitment Tracker' interface with a modal for 'Fiscal year 2022'. The modal displays the current 'Balance: \$40,000.00' and 'Amount: \$40,000.00'. A 'Revised this commitment amount' section is highlighted with a green border, containing a 'New Amount' field set to '\$35,000.00' and a 'Reason for Revision *' text area with the text 'reduced commitment by \$5,000 per updated a'. Below this, the 'Recipient award account' is '1025202' and the 'Recipient award sub account' is 'Example: UXO'. The 'Recipient award object code' is '9915' and the 'Recipient award sub object code' is 'CA'. At the bottom of the modal, there are 'Save revision' and 'Cancel' buttons, both highlighted with a green border.

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

The screenshot shows the 'Commitment Tracker' interface with a modal for 'Fiscal year 2022'. The modal displays the current 'Balance: \$35,000.00' and 'Amount: \$35,000.00'. A 'Commitment Amount History' section is highlighted with a blue border, showing a list of revisions. The first entry is '\$35,000.00 on 09/08/2020, 01:29pm by schavez2' with the reason 'reduced commitment by \$5,000 per updated agreement'. The second entry is '\$40,000.00 on 09/08/2020, 01:14pm by schavez2' with the reason 'Initial commitment'. At the bottom of the modal, there is a 'Delete Entry' button.

Copy a Commitment

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

Commitment Tracker schavez2 ▾

Commitment

Commitment Number 101622

Contributor expand ▾

Description *

CLAS visiting faculty salary commitment FY21

Recipient expand ▾

Recipient chart * Recipient responsibility center Recipient organization *

Attached document:

Classical studies commitment.xlsx ×

Last Updated:

schavez2 - 09/08/2020, 04:37pm

Status *

Active × ▾

Save **Cancel** **Duplicate this Commitment**

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.

Amounts collapse ▲

Select a year to view or edit.

Fiscal Year	Award Account	Sub Account	Amount	Balance
2021	1025202		\$40,000.00	\$40,000.00

Add a Year

Attachments collapse ▲

Add Attachments

Try dropping some files here, or click to select files to upload.

You haven't attached any documents to this commitment yet

Comments

copied from commitment 101622

Status *

Active × ▾

Save **Cancel**