

Commitments Workbook

This Workbook presents common Commitment scenarios in use across units, and outlines how each type can be created and maintained in AMT. Every unit may have specific needs that require the Commitment to be set up slightly differently from other units. AMT has been created to be very flexible in allowing for such variation. The examples you see here are just one way the scenario could be handled.

1. Partial chartstrings can be used. Only Department is required, e.g., Fund can be left blank.
2. To/From detail is optional, only a Commitment Header is needed to track a Commitment.

Each scenario has three sections, the Scenario Description, Example showing the Summary and Financial Detail entries, and Ongoing Tracking listing the steps to follow to keep your Commitments up to date.

Scenarios

Internal Department - You are making a 3 year financial commitment to an initiative within your academic unit. **Page 2**

Startup Support - As part of a faculty startup, your department (24000) and another department (25100) have agreed to pay for 1/2 of post doc (salary) for 3 years at \$37,500/ year each. **Pages 3-4**

Event - You are hosting an event to which multiple departments will contribute. **Page 5**

Funding Internal Award - You manage a proposal and funding process where you award funds to faculty members across campus. **Page 6**

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Scenario: Internal Department

Description: You are making a 3 year financial commitment to an initiative within your academic unit.

Is your Department the Sender/Receiver: Both

Is this a one time or multi year commitment: Multi Year

Is another academic unit involved: No

Is a central office involved: No

Is the commitment to a named person: No

EXAMPLE

Summary

ID	Title	Purpose	Type	Person	Start Date	End Date	FY Start	FY End	Number of Years	Total Amount	Managing Unit
2721	Event XXXX	Department	Various	BLANK	07/01/2020	06/30/2024	2021	2023	3	30,000	Your Unit (automatic)

Financial Details

ID	Date	Year Number	FY	Amount	To/From	Dept	Fund	Program	Project	Activity	Method
2721	07/01/2020	1	2021	10,000	From	24000					Assignment
2721	07/01/2020	1	2021	10,000	To	2400#					Assignment
2721	07/01/2021	2	2022	10,000	From	24000					Assignment
2721	07/01/2021	2	2022	10,000	To	2400#					Assignment
2721	07/01/2022	3	2023	10,000	From	24000					Assignment
2721	07/01/2022	3	2023	10,000	To	2400#					Assignment

Ongoing Tracking

1. Adjust Financial Detail lines as needed, amounts, add/remove years, dates, etc
2. Update Commitment Status based on Prime posting of payment
3. Enter Journal ID and Date once posted
4. Add Comments, Attachments as needed

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Scenario: Faculty Startup - Faculty Home Based with you

Description: As part of a faculty startup, your department (24000) and another department (25100) have agreed to pay for 1/2 of post doc (salary) for 3 years at \$37,500/ year each.

Is your Department the Sender/Receiver: Both

Is this a one time or multi year commitment: Multi Year

Is another academic unit involved: Yes

Is a central office involved: No

Is the commitment to a named person: Yes

Do you want to track "your portion" only? **Option 1:** Input your portion only

Option 2: As the Home unit of the faculty member, you decide to input ALL contributors to this commitment.

EXAMPLE

Summary

ID	Title	Purpose	Type	Person	Start Date	End Date	FY Start	FY End	Number of Years	Total Amount	Managing Unit
4958	Startup Post Doc Support	Startup	Support	Faculty Member Name	07/01/2020	06/30/2024	2021	2023	3	187,500	Your Unit (automatic)

Financial Details

Option 1: Input your portion ONLY

If you just input your portion, you will be only tracking your portion. No other units will see what they are expected to contribute (unless they input their commitment into AMT)

ID	Date	Year Number	FY	Amount	To/From	Dept	Fund (optional)	Program	Project	Activity	Method
4958	07/01/2020	1	2021	37,500	From	24000					Assignment
4958	07/01/2020	1	2021	37,500	To	2400#		Faculty Member Program			Assignment
4958	07/01/2021	2	2022	37,500	From	24000					Assignment
4958	07/01/2021	2	2022	37,500	To	2400#		Faculty Member Program			Assignment
4958	07/01/2022	3	2023	37,500	From	24000					Assignment
4958	07/01/2022	3	2023	37,500	To	2400#		Faculty Member Program			Assignment

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Option 2: Input your portion & contributor portions

If you input contributor portions, you will be tracking the entire commitment. By inputting department/ program outside of your unit, the contributor will see the commitment summary and the financial details for their department.

ID	Date	Year Number	FY	Amount	To/From	Dept	Fund	Program	Project	Activity	Method
4958	07/01/2020	1	2021	37,500	From	24000	optional				Assignment
4958	07/01/2020	1	2021	37,500	From	25100	optional				Assignment
4958	07/01/2020	1	2021	75,000	To	2400#	optional	Faculty Member Program			Assignment
4958	07/01/2021	2	2022	37,500	From	24000	optional				Assignment
4958	07/01/2021	2	2022	37,500	From	25100	optional				Assignment
4958	07/01/2021	2	2022	75,000	To	2400#	optional	Faculty Member Program			Assignment
4958	07/01/2022	3	2023	37,500	From	24000	optional				Assignment
4958	07/01/2022	3	2023	37,500	From	25100	optional				Assignment
4958	07/01/2022	3	2023	75,000	To	2400#	optional	Faculty Member Program			Assignment

Ongoing Tracking

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Scenario: Event with Multiple Contributors

Description: You are hosting an event to which multiple departments will contribute.

Is your Department the Sender/Receiver: Both

Is this a one time or multi year commitment: One Time

Is another academic unit involved: Yes

Is a central office involved: No

Is the commitment to a named person: No

Do you want the receiving unit to be able to view the documentation/ full commitment record: No

EXAMPLE

Summary

ID	Title	Purpose	Type	Person	Start Date	End Date	FY Start	FY End	Number of Years	Total Amount	Managing Unit
3453	Event XXXX	Department	Event/...	BLANK	07/01/2020	06/30/2020	2021	2021	1	30,000	Your Unit (automatic)

Financial Details - Initial Entry

ID	Date	Year Number	FY	Amount	To/From	Dept	Fund	Program (Optional)	Project	Activity	Method
3453	07/01/2020	1	2021	30,000	To	2340#		Event Program			Assignment
3453	07/01/2020	1	2021	10,000	From	27000					Assignment
3453	07/01/2020	1	2021	10,000	From	28000					Assignment
3453	07/01/2020	1	2021	10,000	From	29000					Assignment

Ongoing Tracking

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Scenario: Non-Sponsored Award to a Person

Description: You are an internal funder and you are giving a 2 year Award (internal funding) to a faculty member in another unit. E.g. Magic Grant, Grand Challenges.

Is your Department the Sender/Receiver: Sender

Is this a one time or multi year commitment: Multi Year

Is another academic unit involved: Yes

Is a central office involved: No

Is the commitment to a named person: Yes

Do you want the receiving unit to be able to view the documentation/ full commitment record: Yes

EXAMPLE

Summary

ID	Title	Purpose	Type	Person	Start Date	End Date	FY Start	FY End	Number of Years	Total Amount	Managing Unit
9716	Award for XXX	Department	Incentive/Award	Faculty Member Name	07/01/2020	06/30/2024	2021	2022	2	10,000	Your Unit (automatic)

Financial Details

ID	Date	Year Number	FY	Amount	To/From	Dept	Fund	Program	Project	Activity	Method
9716	07/01/2020	1	2021	10,000	From	24000					Assignment
9716	07/01/2020	1	2021	10,000	To	2340#		Faculty's Program			Assignment
9716	07/01/2021	2	2022	10,000	From	24000					Assignment
9716	07/01/2021	2	2022	10,000	To	2340#		Faculty's Program			Assignment

View Share - On Commitment View screen, select the commitment row and click Share

Ongoing Tracking

1. Adjust Financial Detail lines as needed, amounts, add/remove years, dates, etc
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3. Enter Journal ID and Date once posted
4. Add Comments, Attachments as needed