Adding a New Commitment

1st – Verify that there is no commitment for project. You will know this if you search for the project in the committed module and nothing comes back:

Find an Existing Value  Add a New Value

Search Criteria

Institution: begins with \( \text{UFLOR} \)
Report ID: begins with \( \) 00123456
Project ID: begins with \( \) 00123456
Project Title: begins with \( \)
Status: = \( \)
Project PI ID: begins with \( \)
Project Department: begins with \( \)
Sponsor ID: begins with \( \)
Sponsor Type: begins with \( \)
Approval Path: begins with \( \)
Approval Sequence: \( = \)
Error Messages Exist: \( = \)
My Queue Only

Case Sensitive

Search  Clear  Basic Search  Save Search Criteria
2nd – Click on Add New Value Tab

3rd – On The Add New Value Page you must select a Report ID before it will create the ability to add the commitment:

Effort Commitments
You will decide what the correct Report ID is based on the employee’s HR Data. Are they a 9month employee or a 12month employee? This important to determine as if you create the record on the wrong report ID:

1. You may not be able to find the person you are adding
2. You may create an effort record that will need to be cancelled later and the commitment corrected.
Once selected the commitment can be added:

**Effort Commitments**

If the screen comes up no matching values:

**Effort Commitments**

It may mean that you just added the project to the system. You can’t add the commitment and the project on the same day. It will take overnight for the effort system to update.
If you are able to add it, the next screen you will see is this:

![Image of a screen with columns for Employee, Employee Name, Appointment, Overall Commit %, OTC, Spring 12, and a check box for unselecting.

Then you can continue adding the individual onto the commitment.

4th – Click on the blue person to add an employee to a commitment:

![Image of a screen with columns for Employee, Employee Name, and Appointment.

Verify the person that you need to add is there. The Principal investigator will show up first. If the person is not the PI that you need to add a commitment to, you will need to unselect the check box:

**Add Commitments for Employees**

![Image of a screen with columns for Project Team, Member ID, and options for OK and Cancel.]
Then scroll to the left and click on the plus sign:

Once you click on the plus sign, a new row would be created:

Type in the UFID or search for the UFID of the person and you will be able to add the commitment as needed.

When Adding a new commitment, it is also very important that you select the correct appointment, \textbf{ESPECIALLY FOR THOSE WHO ARE 9MONTH}. This is because you want to make sure that when selecting, you choose the right Fall/Spring Appointment and the right Summer Appointment. If this is not correct, you will be creating an effort report and a commitment that will need to be fixed later.

The next selection is to type in the Beginning and End date of the commitment. This is also very important because some projects will end before the Award or Contract End Date. Verify that the project dates are being used in the selection.
You will then type in the commitment. If it is an overall commitment without committed cost sharing, then the total number will go in that area.

Helpful tip – Do not put any cost sharing for calculating Over the Cap (OTC). The system will do that for you when putting the total commitment in the Total % area.

MCS% Stands for Mandatory Cost Sharing. Only input in this area if there is a salary cost sharing commitment.

The last selection to choose is the Periods. Again, this is very important especially for the 9month individuals. A 9month individual will have a Fall/Spring Commitment (All Except Summers) and a Summer Only Commitment.

Once the new commitment is added, the system will display what you input on the front screen of the commitment. This is the time to double check everything before you approve the commitment. **This is the ONLY TIME you can delete a row if you made a mistake and this is ONLY FOR a newly added row.** Once you add the row and post the commitment, this is no longer an option even if the mistake is made.
If everything is ok, you can approve the commitment and post. This is done by clicking on the Approve Button.

Select Approve and then OK.