

# UTRAC Sub-Awards List

## Page Help

*Last updated: February 18, 2025*

### Contents

Filter Header and Using Filters.....	2
UTRAC Sub-Awards Details Table and Accessing the Summary Screen.....	3
Settings and Exporting.....	4
Editing My Views .....	5
Advanced Filters .....	6

## About the Sub-Awards List

The Sub-Awards List is organized by sub-award request records submitted by Principal Investigators (PIs). Each request is unique to a UTRAC (i.e. every UTRAC will have one request record). You can use this list to view active and past sub-award requests.

**Note:** You cannot approve an active request task from the Sub-Awards List. To approve a task, you must first claim it from the inbox.

UTRAC Sub-Awards List

Standard\*

Search

Editing Status: All

Sub-Award Request No.:

UTRAC No.:

Application:

Sponsor:

Program:

Researcher Name:

Research Officer:

Go Clear Adapt Filters

UTRAC Sub-Awards Details (66)

Sub-Award Req No.	UTRAC No.	Application	Sponsor
10000198	72071958	Sub-awards test application (242453)	Centre for Addiction and Mental Hea (303282)



Program: Grant, Operating (20004635)  
Researcher Name: Stephen  
Current Status: Approved by Approver

Page Help

### A Filter Header

The following search and filter fields will be displayed by default in the filter header.

Additional filters can be added or existing filters hidden using the **Adapt filters** button.

- **Search** (marked in red on image): This is a general search field that will perform a keyword search on **all** fields.
- **Sub-Award Request No.:** Number assigned on creation of a sub-awards request form.
- **UTRAC No.:** Number assigned on creation of UTRAC.
- **Application:** Unique identifier to the application assigned in RIS.
- **Sponsor:** The sponsor number for the agency, organization, or company that is funding the research. To search by sponsor name, click the  (double box) and use the sponsor name field.
- **Program:** The program number under which the Sponsor will fund the research. To search by program name, click the  (double box) and use the program name field.
- **Researcher Name:** Name of the PI that submitted the request.
- **Research Officer:** Name of VPRI Research Officer assigned to the UTRAC.
- **Go:** After entering search terms, click the Go button.
- **Clear:** Clear all search fields
- **Adapt Filters:** Add additional filters or remove listed filters.

## B UTRAC Sub-Awards Details Table

Once you have set your search parameters and selected “Go”, the search results will display in the content area of the Sub-Awards Details table.

Sub-Award Req No.	UTRAC No.	Application	Sponsor	
<a href="#">10000198</a>	72071958	Sub-awards test application (242453)	Centre for Addiction and Mental Hea (303282)	>
Program: Grant, Operating (20004635)				
Researcher Name: Stephen				
Current Status: Approved by Approver				

You can track the status of the request from the **Current Status** field.

- **Submitted and Sent to Approver:** The PI submitted the request to the Research Officer.
- **Under Review by Approver:** The Research Officer is reviewing the request.
- **Sent to Project Manager by PI:** The PI sent the request to their designated Project Manager to complete. Please note, only the PI can submit the request.
- **Sent to PI by Project Manager:** The Project Manager sent the request to the PI.
- **Approved by Approver:** The Research Officer approved the request and will begin processing the sub-award.
- **Forwarded by Approver:** The Research Officer forwarded the request to another Research Officer.
- **Returned to PI by Approver:** The Research Officer returned the request to the PI for revisions.
- **Rejected by Approver:** The Research Officer rejected the request.

You can access the Summary Screen for the request or open the request directly to view its contents.

<a href="#">10000162</a>	72071930	Request Form Sample Application_1 (238357)	Natural Sciences & Engineering (300001)	Alliance Missions Grants (20014392)	>
Researcher Name: Stephen					
Sponsor Reference: A12345					
Research officer: Mark Bold					

Click the request form number to open and view the request details.

Click anywhere in the row to open the Summary Screen (see below)

10000198

Sub-awards test application



SubAward Details

Versions

#### General Details

Researcher Name:

Stephen

Sponsor:

Centre for Addiction and Mental Hea (303282)

Program:

Grant, Operating (20004635)

Application:

Sub-awards test application (242453)

#### Document Details

Created By:

Stephen

Created At:

Feb 11, 2025, 1:14:25 PM

Changed By:

Mark

Changed At:

Feb 13, 2025, 9:47:49 AM

#### Versions

Standard ▾

Search



Version	Version Type	Status	Active	
3	Amendment	Approved by Approver	✔ Yes	>
2	Amendment	Approved by Approver	✘ No	>
1	Original	Approved by Approver	✘ No	>

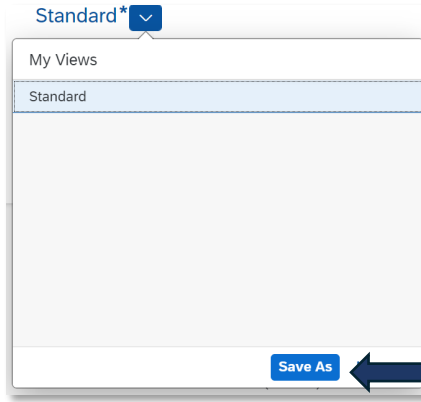
- **Version Type:**
  - **Amendment:** This version is an amendment to the last approved version of the request.
  - **Original:** This is the original version of the approved request form.
- **Status:** The current workflow status of the listed version.
- **Active:**
  - **Yes:** This is the most recent version of the request form.
  - **No:** This version is not active because there is a more recent version of this request.



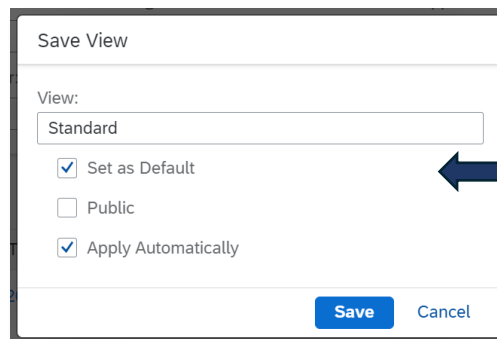
- **Page Help:** Opens and downloads help documentation (i.e. this Page Help guide).
- **Show/Hide Details:** Show/Hide additional filters selected from the Settings button.
- **Settings:** Add additional columns or remove listed columns. Users can also shuffle the order of the columns using the arrow buttons
- **Export:** Export sub-awards search results as an Excel file.

#### D My Views

Users can personalize their own search filters and save them as a default view. To add/remove search filters, click Adapt Filters in section A.




Click “Save As” to save new default view

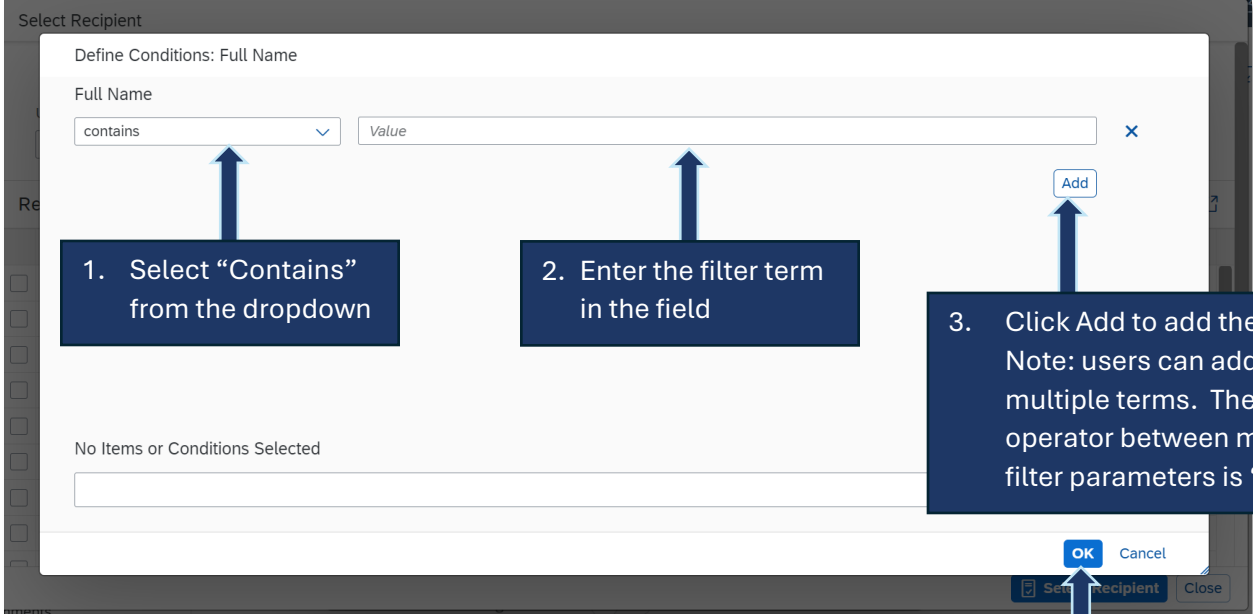


Enter new name for view. Click “Set as Default” & “Apply Automatically”.

## Advanced Filters

With the exception of **Search** on the Filter Header, all filter fields in the sub-awards list are case-sensitive by default. Users will need to enter the **exact value** to find a match. For example, if a user wants to find results using the term “University of Toronto”, they will need to type the string in full, including the correct capitalization.

To filter on a term using part of the term and without capitalization, users should access the advanced filter by clicking the  (double box) in the filter field and use the “Contains” operator on their term.



1. Select “Contains” from the dropdown
2. Enter the filter term in the field
3. Click Add to add the term. Note: users can add multiple terms. The operator between multiple filter parameters is “AND”
4. Click OK then Go to filter and view results