

# University of Toronto Research Account (UTRAC) Page Help

View the full [UTRAC user guide here](#).

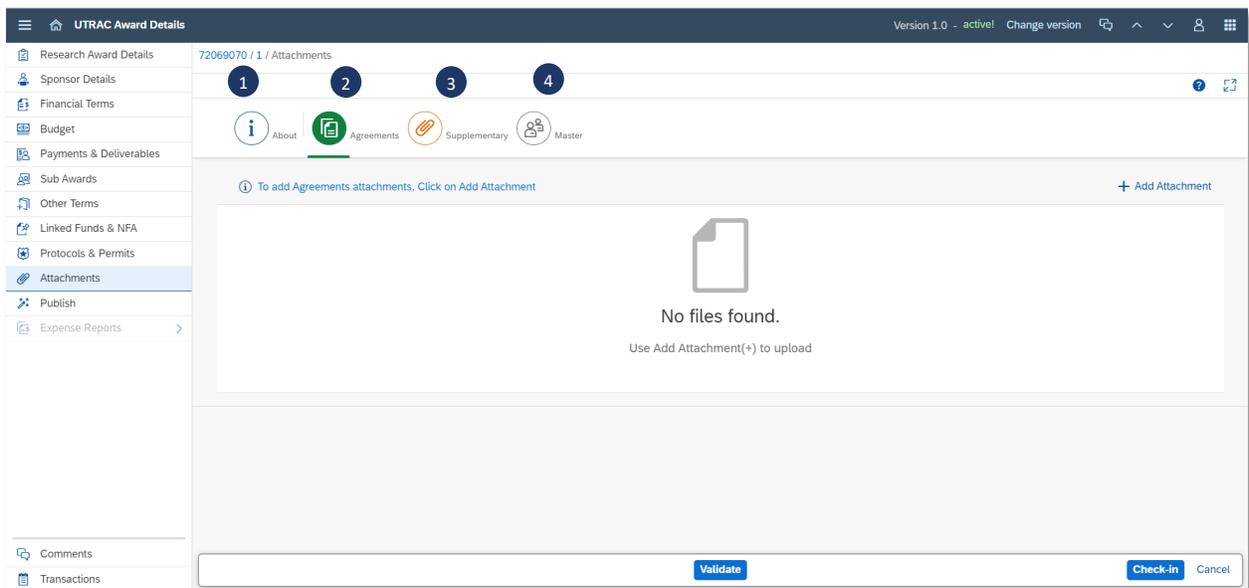
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## Attachments

Use this page to attach key funding documents to the UTRAC, such as funding agreements, letters of award, amendments, etc.

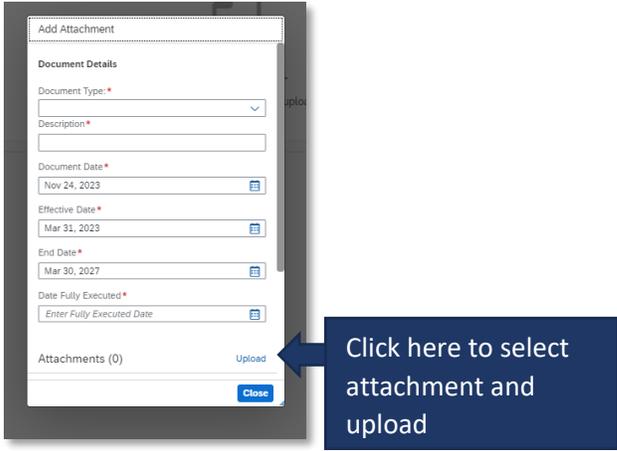
**Note:** Any role that can view the UTRAC will be able to access the attached documents.



- 1 About:** Contains field descriptions for each of the listed categories.
- 2 Agreements:** Users should attach documents such as research agreements, notice of awards and amendments in this section.

To add an attachment, click  in the right corner of the screen.

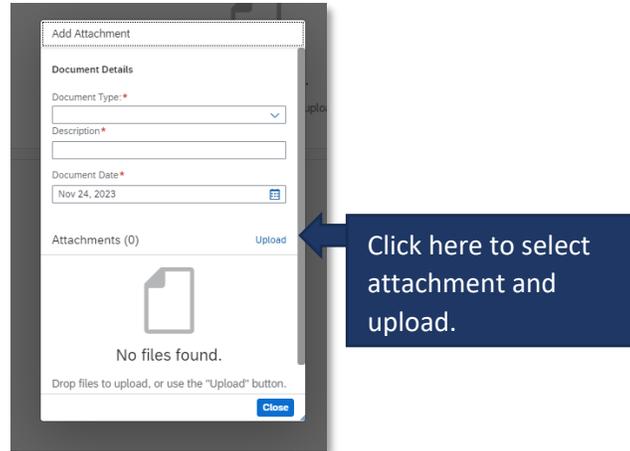
**Note:** If this is a published UTRAC, users will need to create a new version to add an agreement document. For details on creating a new version, [see Creating a New UTRAC Version](#).



### Add Attachment

- **Document Type:** Indicate if the attachment is a Research Agreement, Notice of Award / Award Letter, or Amendment from the dropdown menu.
- **Description:** Enter a short description of the document
- **Document Date:** Date that the document was attached.  
*Defaults to today's date.*
- **Effective Date:** Date on which document comes into effect.  
*Users can select the date from the calendar icon, or manually enter the date using the format MMM DD, YYYY/ e.g., Nov 23, 2023. Defaults to the grant start date.*
- **End Date:** Date document is no longer in effect.  
*Users can select the date from the calendar icon, or manually enter the date using the format MMM DD, YYYY/ e.g., Nov 23, 2023. Defaults to the grant end date.*
- **Date Fully Executed:** If the document is a research agreement or amendment, indicate the date on which the document was fully executed.  
*Users can select the date from the calendar icon, or manually enter the date using the format MMM DD, YYYY/ e.g., Nov 23, 2023. Defaults to the grant end date.*
- **Upload:** Click this button to browse your computer's hard drive for the document you wish to attach.  
**Note:** You can also drag-and-drop a document from your computer (e.g. from Microsoft File Explorer or Mac File Finder) directly into the Add Attachment window.

- 3 **Supplementary:** Users should attach supplementary documents that support the agreement/notice of award, such as financial reporting template, progress reporting template, sponsor policies/guidelines, legal advice, note, or email.



### Add Attachment

- **Document Type:** Select if the attachment is a Financial Reporting Template, Progress Reporting Template, Sponsor Policies / Guidelines, Legal Advice, Note, or Email.
- **Description:** Enter a short description of the document
- **Document Date:** Date that the document was attached.

*Defaults to today's date.*

- **Upload:** Click this button to browse your computer's hard drive for the document you wish to attach.

**Note:** You can also drag-and-drop a document from your computer (e.g. from Microsoft File Explorer or Mac File Finder) directly into the Add Attachment window.

For emails, you can also drag-and-drop an email message directly from Microsoft Outlook (desktop app only) into the Add Attachment window to attach the email message.

- 4 **Master:** Users should attach documents such as a master agreement or master amendment to this section.

**Note:** The system will not allow attachments to be added in this section unless users have marked this UTRAC as **YES** for **Is this a Master Agreement** in the Research Award Details page.

**Note:** If you have linked another UTRAC to the current UTRAC that is marked as a **Master Agreement**, any attachments you upload in the Master section will be visible on all linked UTRACs.

The screenshot shows a web form titled "Add Attachment". It contains several fields under the heading "Document Details":

- Document Type:** A dropdown menu.
- Description:** A text input field.
- Document Date:** A date picker showing "Nov 24, 2023".
- Effective Date:** A date picker showing "Mar 31, 2023".
- End Date:** A date picker showing "Mar 30, 2027".
- Date Fully Executed:** A date picker with the placeholder text "Enter Fully Executed Date".

At the bottom of the form, there is a section for "Attachments (0)" with an "Upload" button. A blue callout box with a white arrow points to the "Upload" button, containing the text: "Click here to select attachment and upload." A "Close" button is also visible at the bottom right of the form.

## Add Attachment

- **Document Type:** Indicate if the attachment is a Master Agreement or Master Agreement – Amendment from the dropdown menu.
- **Description:** Enter a short description of the document
- **Document Date:** Date that the document was attached.  
*Defaults to today's date.*
- **Effective Date:** Date on which document comes into effect.  
*Users can select the date from the calendar icon, or manually enter the date using the format MMM DD, YYYY/ e.g., Nov 23, 2023. Defaults to the grant start date.*
- **End Date:** Date document is no longer in effect.  
*Users can select the date from the calendar icon, or manually enter the date using the format MMM DD, YYYY/ e.g., Nov 23, 2023. Defaults to the grant end date.*
- **Date Fully Executed:** If the document is a research agreement or amendment, indicate the date on which the document was fully executed.  
*Users can select the date from the calendar icon, or manually enter the date using the format MMM DD, YYYY/ e.g., Nov 23, 2023. Defaults to the grant end date.*
- **Upload:** Click this button to browse your computer's hard drive for the document you wish to attach.  
**Note:** You can also drag-and-drop a document from your computer (e.g. from Microsoft File Explorer or Mac File Finder) directly into the Add Attachment window.

## Editing, Saving, Checking-In, and Cancelling Drafts

When a user first creates a UTRAC and any time a user is editing a UTRAC, the system creates a draft of that UTRAC record. Only the user that is editing that draft will be able to see the changes that have been made to that draft.

The following sections detail the system behaviours of working on a UTRAC draft.

### Edit

When a UTRAC is opened in View mode, users will not be able to edit the field content or make any other changes to the UTRAC.

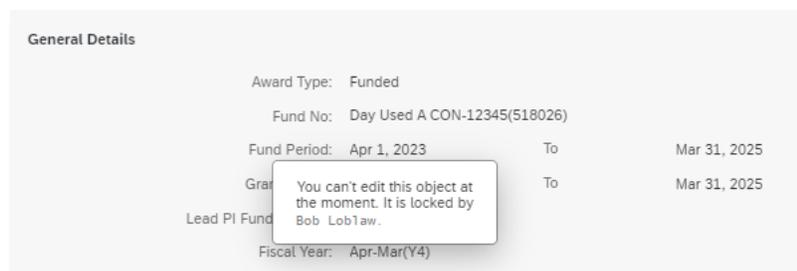
To begin editing a UTRAC, click the **Edit** button in the top right corner of the page to create a new draft of that UTRAC.

Note that for UTRACs that are published, the fields you are allowed to edit depend on whether you are updating an existing version or creating a new version. See **“How to Edit a Published UTRAC”** section in the **Publish Page Help** for more details.



**Tip:** When you are editing a UTRAC draft, other users (e.g. other UTRAC creators/editors) will **not** be able to edit that same UTRAC. Even if you exit the UTRAC, the UTRAC draft will remain locked for editing for any other user other than you. If another user tries to edit the UTRAC draft, they will see an error message.

To unlock a UTRAC for editing by other users, you must **Check-in** the UTRAC. See [Check-in](#) section for more details.

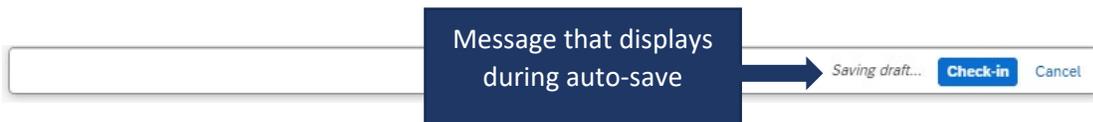


## Auto-save

When a user is editing a UTRAC, any changes they make – including changes to text field content, attaching documents, linking UTRACs or Non-Funded Agreements, creating Overhead calculation rules, adding Payment & Deliverables schedules, toggling Yes/No sliders – will automatically save in the draft they are editing.

If the user intentionally or accidentally closes the UTRAC, next time they open the UTRAC from the UTRAC Search List, all of the changes they made in the last editing session will be preserved.

**Tip:** Auto-save allows you to partially create or edit a UTRAC and save your changes without needing to validate and publish your changes in one, uninterrupted session.



## Check-in

When a user (e.g. user #1) is editing a UTRAC draft, that draft is locked for editing by other users (e.g. users #2 and #3). This is true even if user #1 is not in an active editing session and has closed the UTRAC.

To allow users #2 or #3 to edit a UTRAC, user #1 must first click the **Check-in** button on the right side of the bottom toolbar. This action unlocks the UTRAC for editing by other users. Once another user begins editing a UTRAC, that draft will be locked for editing by other users. For example, once user #2 opens the UTRAC and clicks Edit, user #1 and user #3 will be unable to edit that same UTRAC until user #2 clicks Check-in.

Once a user checks-in a UTRAC, the UTRAC will revert to View mode. To begin a new editing session, a user must click the **Edit** button.



## Cancel

When a user is editing a UTRAC draft, selecting **Cancel** will discard all changes made to the UTRAC since it was last checked-in.

For instance, if a user opens a UTRAC on December 4<sup>th</sup> that was checked in on December 1<sup>st</sup>, edits several fields and then clicks Cancel, the UTRAC will revert back to the state it was in on December 1<sup>st</sup>.

To discard changes since last check-in, click **Cancel** on the right side of the bottom toolbar to display a confirmation message. To confirm your selection, click **Discard**.

**IMPORANT NOTE:** If you have created a UTRAC and never checked it in, clicking on Cancel will delete that UTRAC (since it will discard all changes since the last check-in, which has not occurred). If this happens, you can still create a new UTRAC and link it to the same RIS application as in the original UTRAC you cancelled. If you have already created a Fund for this UTRAC, the system will not allow you to Cancel and discard your changes and you will be required to first Check-in the UTRAC.

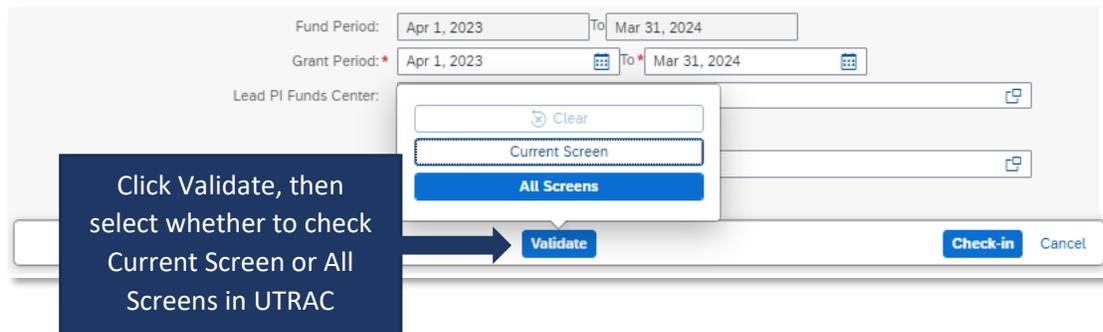


## Validate

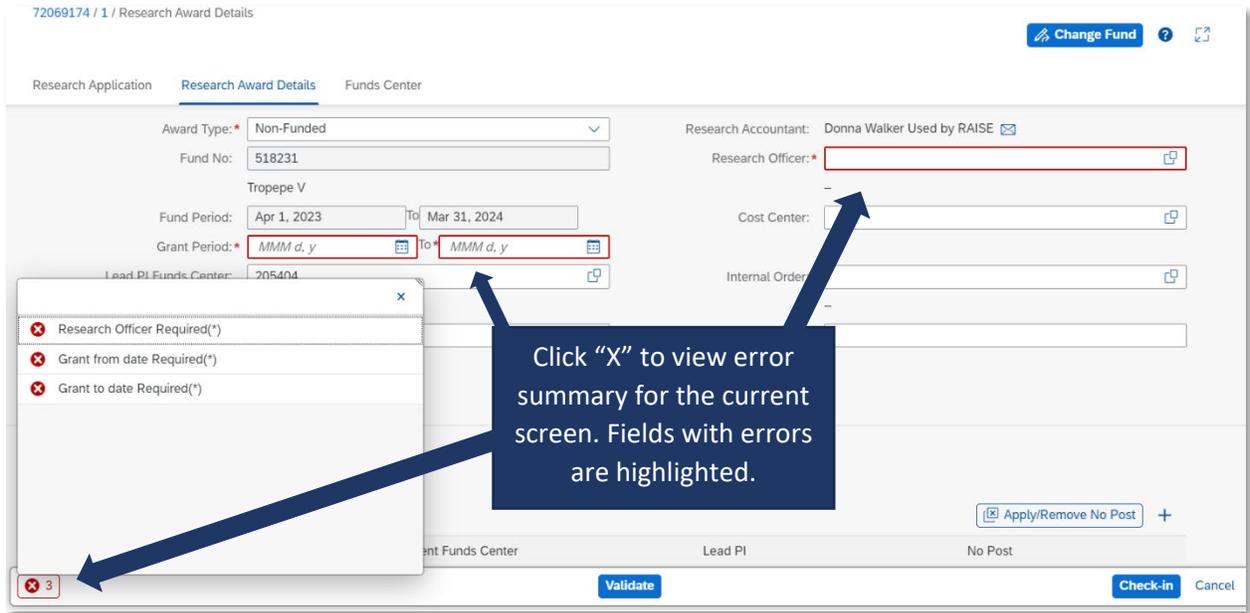
When a user is creating and editing a UTRAC, they can validate at any time that all required fields have been completed and that there are no errors.

To validate the UTRAC field data, click **Validate** in the middle of the bottom toolbar. From there, you will have two options:

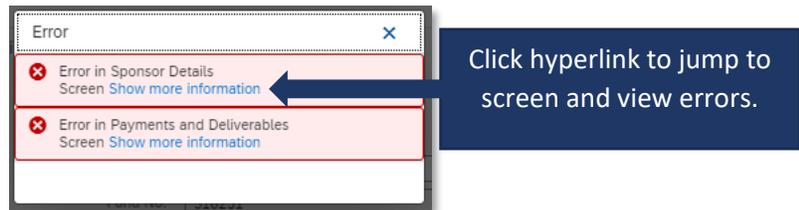
- **Current Screen:** Validates all fields on the screen you are currently viewing.
- **All Screens:** Validates fields on all UTRAC screens.



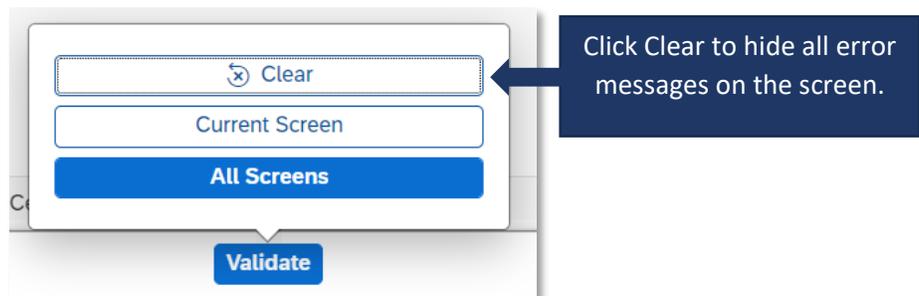
If you select **Current Screen**, any fields with errors on the screen will be highlighted in a red box. In addition, a **✖** flag in the left corner of the bottom toolbar will appear and display the number of errors on the current screen. Click the **✖** flag to display a summary of field errors on the screen. If the error message is too long to display fully in the summary, you can also click on the error to view the full message.



If you select **All Screens**, a pop-up box will display indicating all screens (if any) that contain errors. Click on "Show more information" to jump to that screen and view a summary of errors on that screen.



**Tip:** If you have clicked Validate, the error messages will continue to display until you have either corrected them or cleared them. To clear the error messages from your screen to created an unobstructed view, click **Clear**.



**Tip:** Validating for errors is a handy tool to check your work and you can use it as often as you need, or not at all. When you **Publish** a UTRAC, the system will always automatically validate the field data in the UTRAC and flag any errors for correction.

## Creating a New UTRAC Version

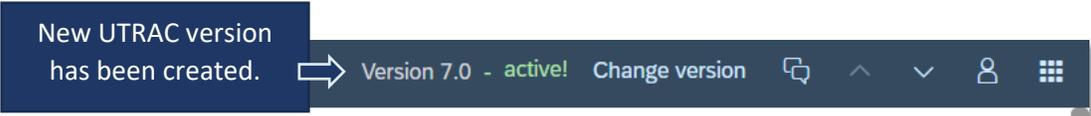
Creating a new UTRAC version means that the UTRAC version number will increase by 1. For example, if the UTRAC is version 2.0, creating a new version means that version 3.0 will be created and any changes will be made in version 3.0.

To create a new UTRAC version, find the UTRAC in the UTRAC Search List and click anywhere on the row **except** for the UTRAC No. (blue hyperlink) to open the summary screen.

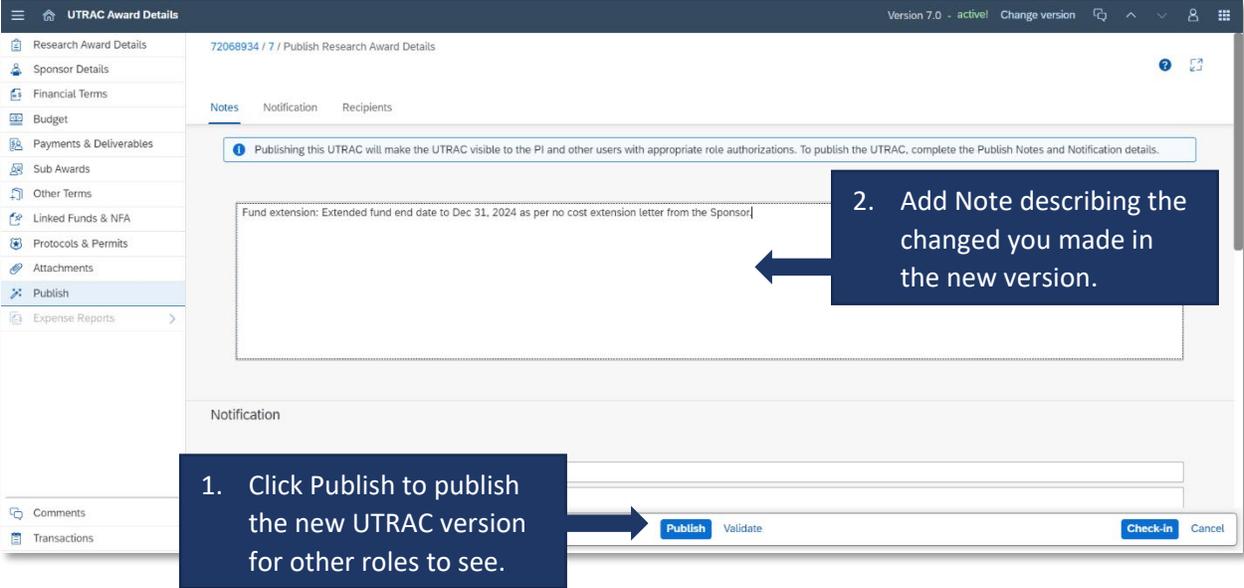
UTRAC No.	Lead Researcher	Title / RIS Application #	Sponsor
72068934	Agnus Day Used by RAISE	Inclusion of video game design in pedagogical methodologies (231637)	Connaught Fund (300743)

Scroll down to the Versions table and click **Create Version**. This will create the next version of the UTRAC and open the UTRAC in Edit mode.

Version	Version Type	Active	Published	Published Date	Last Changed By
6	Revision	Yes	Yes	Dec 2, 2023	
5	Revision	No	Yes	Nov 28, 2023	



You can begin editing the new UTRAC version. Once you have completed your changes, go to the Publish screen. You must enter a Note describing the changes you made in that version. Once you have completed the Note and (optionally) added a Notification message and recipients, click **Publish** in the bottom toolbar.



**Tip:** To see the Revision Notes for previous UTRAC version, open a UTRAC in View mode and scroll down to the Versions section on the Research Award Details screen. Each previous version will include a preview of the note under **Revision / Published Notes**. To view the full note, click **Show More**.

