

University of Toronto Research Account (UTRAC) Page Help

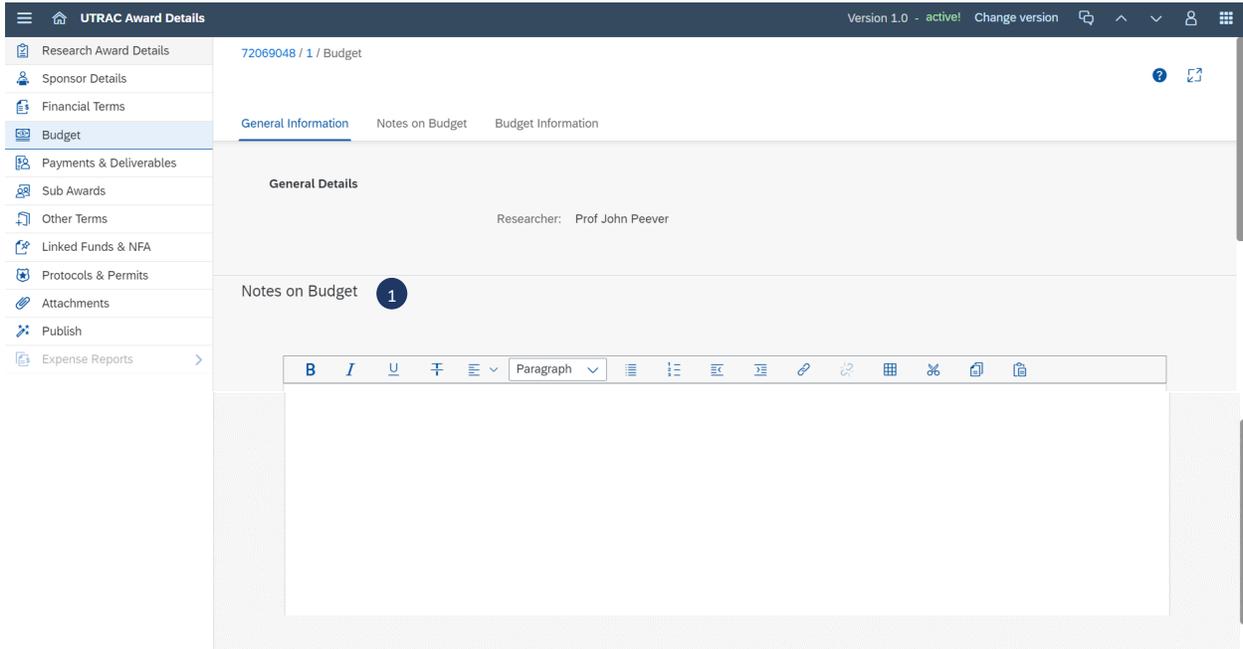
View the full [UTRAC user guide here](#).

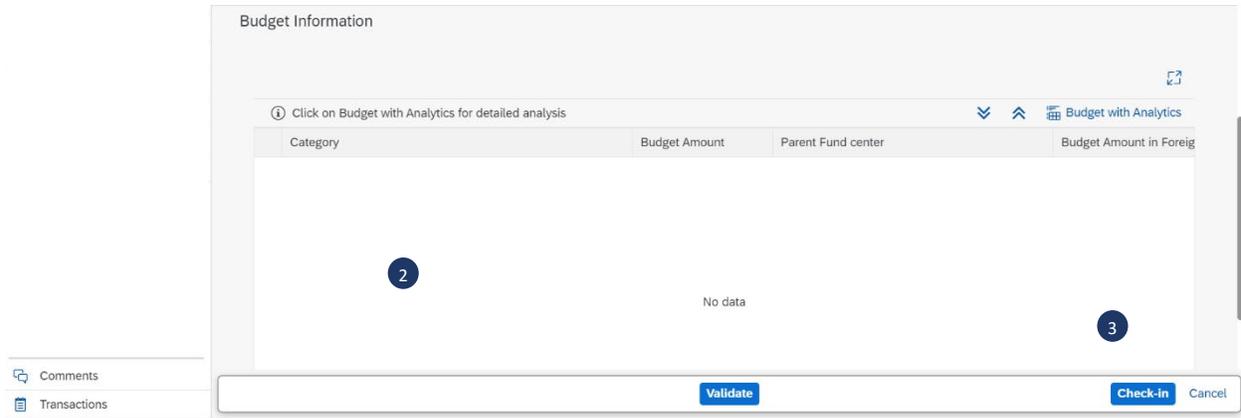
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Budget

Use this page to enter the Notes on Budget. Budget entry documents created in Budgeting Workbench will display in the Budget Information table.





1 **Notes on Budget:** Information related to the award budget, such as details on incrementally funded awards (e.g. budget releases for each period are subject to separate approval from the Sponsor), special foreign currency notes, and any adjustments to the budget over the lifetime of the award.

2 **Budget Information**

To set up the budget, you can access the Budgeting Workbench (see [user guide](#)) either from the Transactions page, the My Items menu, or from the tile in FLP.

For guidance on using Budgeting Workbench, consult the **help guide**.

After setting up the budget, budget information will be displayed:

Category	Budget Amount	Parent Fund center	Budget Amount in Foreign Currency	Effective Date	Exchange Rate
▼ Fund Center: 00000	100,000.00 CAD				
▼ Fund: 00000	100,000.00 CAD				
▼ Period: Apr 01, 2023	50,000.00 CAD				
Open	50,000.00	(MED:Physiolo Res)			
▼ Period: Apr 01, 2024	50,000.00 CAD				
Open	50,000.00	(MED:Physiolo Res)			

To expand periods and view the commitment items, click the > button.

To expand all and view all fund center (s) and period (s), click the ≡ button.

To collapse all and collapse all fund center (s) and period (s), click the ⌵ button.

Note: For the budget information to display in the Budget Information table, the budget period used in Budgeting Workbench must fall within the Fund Period (Fund Start and End Dates) for the fund. If you

cannot see the budget details after creating the budget and refreshing the screen, check that the correct period was used in the budget entry document.

3 Budget with Analytics

This page allows you to change how you can view the budget. For example, you can change the view to group by commitment item across periods, sort by reverse chronological order for budget periods, and other variations.

Fund	Funds Center	Period	Budget Category	Budget Amount	Parent Fund Center	Budget Amount in Foreign Currency	Effectiveness	Exchange
Fund: 00300								
> Funds Center: 00300								
> Period: Apr 1, 2023	00300	Apr 1, 2023		50,000.00	CAD			
> Period: Apr 1, 2024	00300	Apr 1, 2024		50,000.00	CAD			
00300	00300			100,000.00	CAD			
				100,000.00	CAD			

- A Show Items:** Either shows all budget data in table view, or only shows data based on selection on the chart visualization.
- B Settings:** Add additional columns or remove listed columns. Users can also shuffle the order of the columns using .
- C Export:** Export budget data as an Excel file.
- D Full Screen:** Minimize/maximize section.
- E View Graphs:** Users can pick from different visualization options to view the budget data in graphical form.
- F Column Settings:** Allows you to change column settings in the budget table, such as grouping items by a column, sorting in ascending and descending order, and other functions.

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.

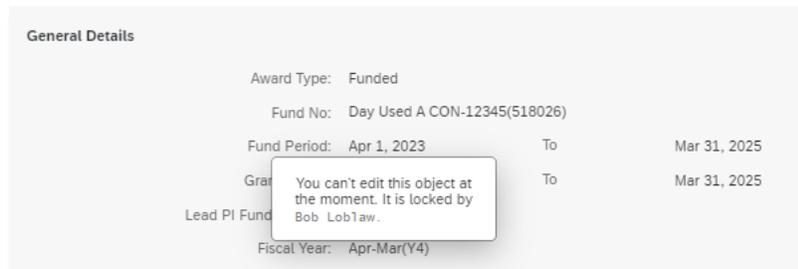
To begin editing a UTRAC, click the **Edit** button in the top right corner of the page to create a new draft of that UTRAC.

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.



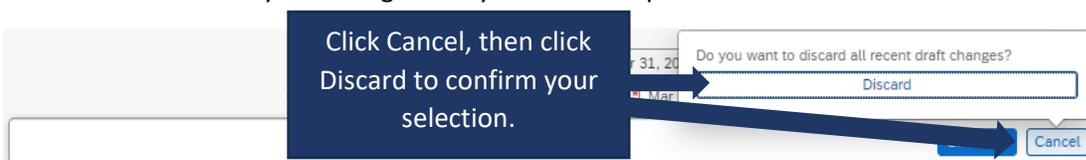
Cancel

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 4th that was checked in on December 1st, edits several fields and then clicks Cancel, the UTRAC will revert back to the state it was in on December 1st.

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**.

IMPORTANT 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.

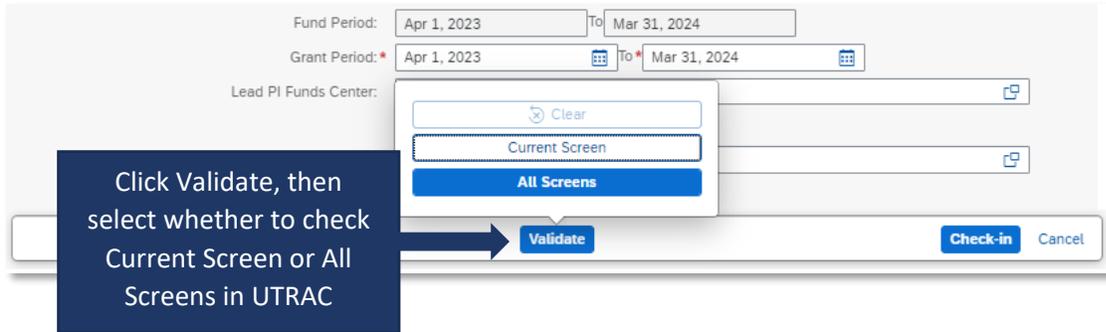


Validate

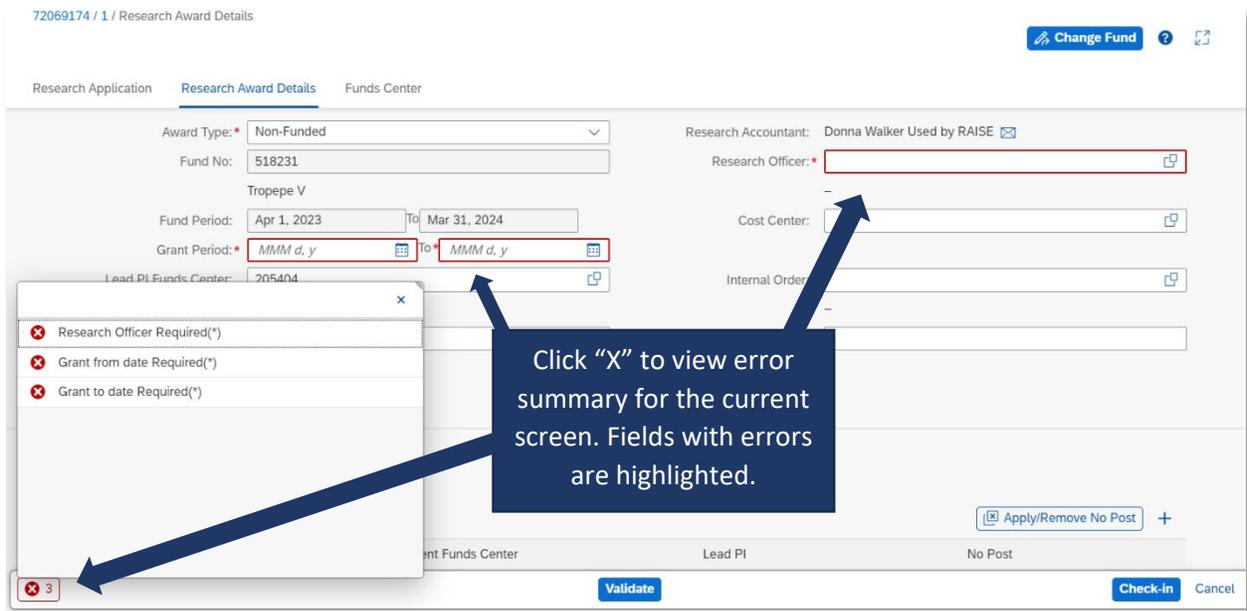
When a user is creating and editing a UTRAC, they can validate at any time that all required fields have been completed and that there are no errors.

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

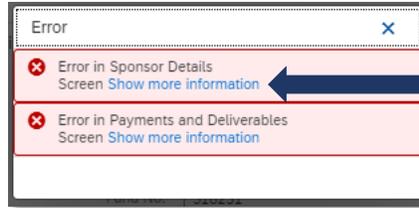
- **Current Screen:** Validates all fields on the screen you are currently viewing.
- **All Screens:** Validates fields on all UTRAC screens.



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.

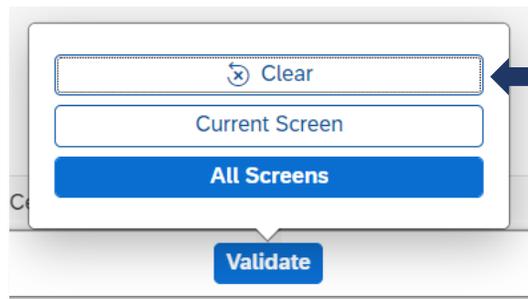


If you select **All Screens**, a pop-up box will display indicating all screens (if any) that contain errors. Click on "Show more information" to jump to that screen and view a summary of errors on that screen.



Click hyperlink to jump to screen and view errors.

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**.



Click Clear to hide all error messages on the screen.

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.