

University of Toronto Research Account (UTRAC) Page Help

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

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Financial Terms

Use this page to enter financial details about the award, such as the Sponsor Approved Amount, Carryforward rule, Overhead calculation rules, etc.

The screenshot displays the 'UTRAC Award Details' interface for award 72069048 / 1 / Financial Terms. The left sidebar contains navigation options: Research Award Details, Sponsor Details, Financial Terms (selected), Budget, Payments & Deliverables, Sub Awards, Other Terms, Linked Funds & NFA, Protocols & Permits, Attachments, Publish, and Expense Reports. The main content area is divided into three tabs: General Information, Overhead, and Other Details. The 'General Information' tab is active and contains five numbered sections: 1. Payment (Sponsor Approved Amount: 0.00, In-Kind Contribution: 0.00), 2. Holdback (Percentage: 0.000, Amount: 0.00), 3. Carryforward (Rule: A, 100%), 4. Overhead Distribution, and 5. Other Details. The 'Other Details' section is expanded to show a list of items: Carry Forward Details, Budget Transfer Rule, Extension Rule, Eligible Expenses, Ineligible Expenses, and Overhead. At the bottom, there are buttons for 'Validate', 'Check-in', and 'Cancel'. The top right corner shows 'Version 1.0 - active!' and 'Change version'.

1 Payment

- **Sponsor Approved Amount:** Total amount and currency expected from the Sponsor, as indicated on the Sponsor letter of award or agreement.
Users can change the default currency (CAD) from the  icon.
- **In-Kind Contribution:** Dollar value of in-kind matching that meets ALL of the following criteria:
 - Non-cash but has financial value;
 - Contribution from an external institution or industry partner;
 - Required by Sponsor to be included on the financial report.

2 Holdback

- **Percentage:** Percentage of the total award that will remain unpaid by the Sponsor until a condition or instance required by the Sponsor has occurred (e.g. completion of project milestone or final deliverable).
Changing the Percentage will automatically update the Amount.
- **Amount:** Amount of the total award that will remain unpaid by the Sponsor until a condition or instance required by the Sponsor has occurred.
Changing the Amount will automatically update the Percentage.

3 Carryforward

- Carryforward rule for unspent balance between budget periods set by the Sponsor.
To change the rule, click the  icon.

4 Overhead

- Indicates the rule as set by the Sponsor agreement/letter of award for calculating overhead (i.e. indirect costs) in relation to the direct costs budget.

5 Other Details

- **Carry Forward Details:** Additional information related to the carry forward rule for unspent balance between budget periods set by the Sponsor, if applicable.
- **Budget Transfer Rule:** Information related to any restrictions on transferring budget between budget categories and steps that need to be followed to make these changes, if applicable.
- **Extension Rule:** Information related to the procedure for requesting a project extension from the Sponsor and deadline for submission of the request, if applicable
- **Eligible Expenses:** Information related to eligible expense categories according to the agreement and/or Sponsor rules, if applicable.
- **Ineligible Expenses:** Information related to any expense types that are ineligible according to the agreement and/or Sponsor rules, if applicable.

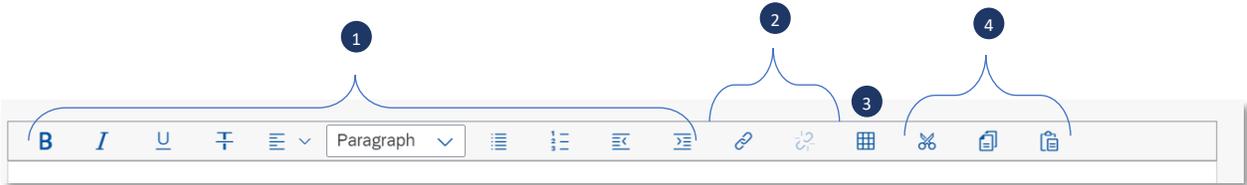
- **Overhead:** Additional overhead details (in addition to the Overhead calculation rules, if any) set by the Sponsor, if applicable.

For details on how to edit text in these fields, see [Text Fields](#) section.

You can also view the “Other Details” section in full screen by clicking the  icon.

Text Fields

Multiple sections in UTRAC contain text fields where users can enter and edit text.



- 1 Edit text tools.
- 2 Add/remove hyperlinks: Research Officers can link to online resources like a Sponsor website using the hyperlinks tool.
- 3 Insert table.
- 4 Cut/Copy/Paste.

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.

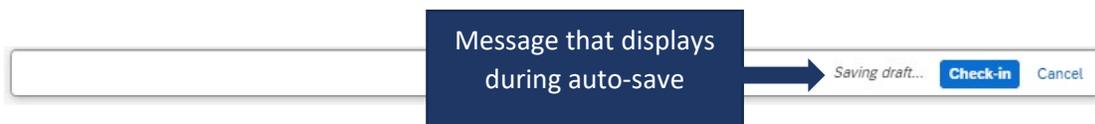


Auto-save

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.

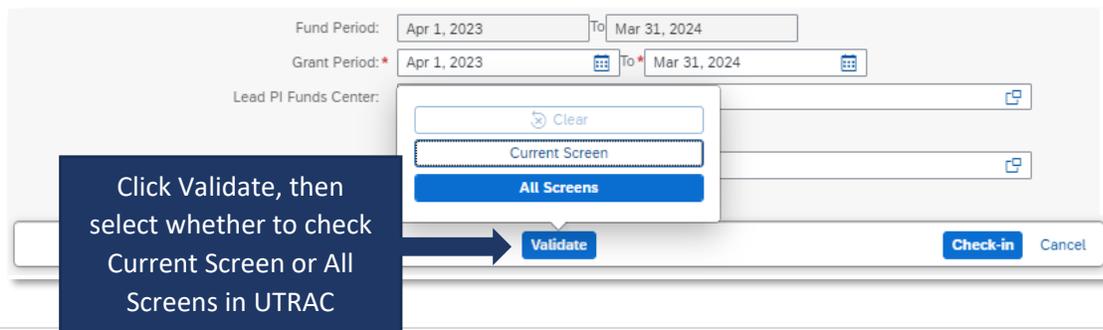


Validate

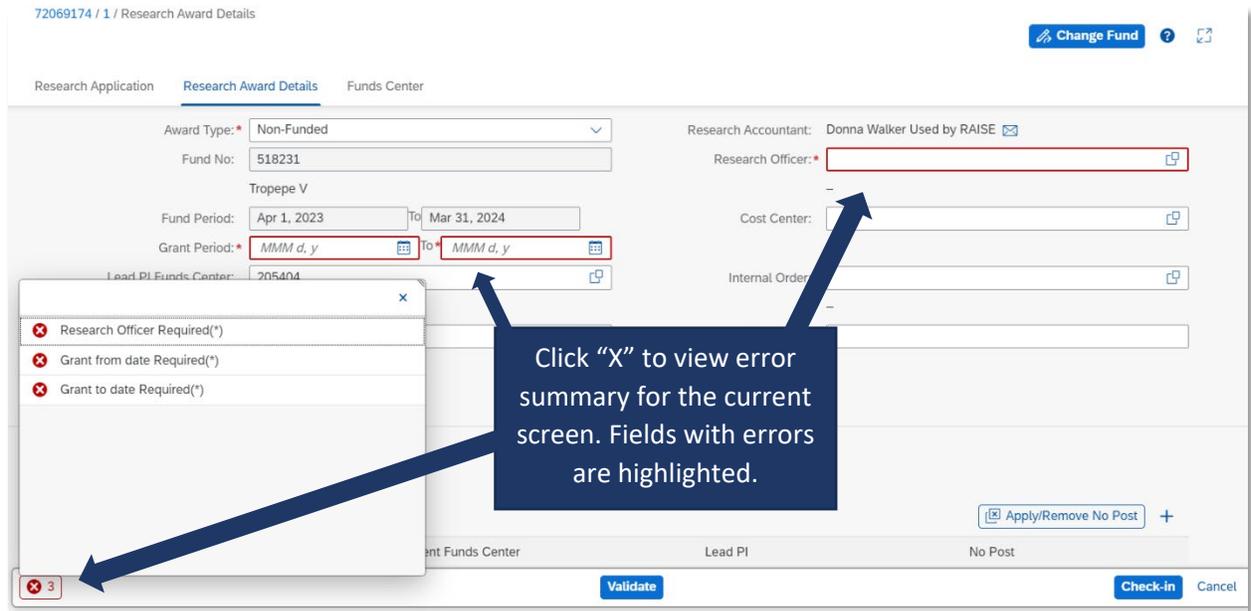
When a user is creating and editing a UTRAC, they can validate at any time that all required fields have been completed and that there are no errors.

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

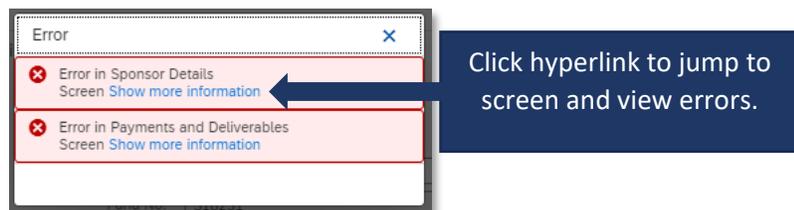
- **Current Screen:** Validates all fields on the screen you are currently viewing.
- **All Screens:** Validates fields on all UTRAC screens.



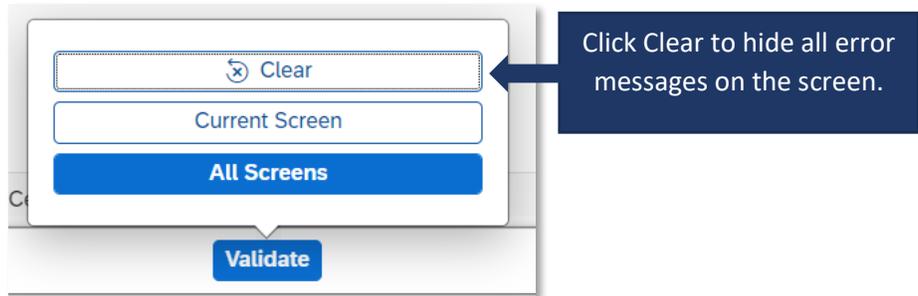
If you select **Current Screen**, any fields with errors on the screen will be highlighted in a red box. In addition, a **✖** flag in the left corner of the bottom toolbar will appear and display the number of errors on the current screen. Click the **✖** flag to display a summary of field errors on 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.



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 create 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.