University of Toronto Research Account (UTRAC) Page Help

View the full **UTRAC user guide here**.

Contents

Linked Funds & NFA

Use this page to link related UTRACs (funded agreements) or non-funded research agreements (e.g. Data Transfer Agreements, Material Transfer Agreements).

Click "+" to link UTRAC or Non-Funded Research Agreement. You can link multiple UTRACs or agreements.

To link another UTRAC or non-funded research agreement, click "+" in the corresponding table. To unlink a UTRAC or agreement, click "x" beside that selection.

① **Linked UTRAC's details- Linked Funds (Different MRA)**

Use this section to link other funds/UTRACs that have been created based on **a different RIS** application number.

- o **UTRAC ID**: The unique identifier of the linked UTRAC.
  Find the UTRAC number using the advanced search ⬚. *For more details on how to use the advanced search function, see [Advanced Search](#).*
- o **Sponsor**: The name of the agency, organization, or company that is funding the research.
- o **Program**: The program under which the agency, organization, or company will fund the research.
- o **Researcher**: Name of the primary researcher on the research project
- o **Application**: The title of the research project and the Application Number assigned when the MRA is created by the Researcher.
- o **Fund**: Unique fund identifier assigned in FIS.
- o **Is Master**?:
  - ▪ **Yes**: UTRAC where the Sponsor is providing funding for multiple projects under this master agreement.
  - ▪ No: UTRAC that is not a master agreement.
- o **Sponsor Reference**: Number assigned by the Sponsor for application/award.

② **Linked Funds (Same MRA)**
In this section, any funds/UTRACs that have been created based on the **same RIS application** number will be **automatically linked and listed**.
- o **UTRAC ID**: The unique identifier of the linked UTRAC.
- o **Fund**: Unique fund identifier assigned in FIS.
- o **Sponsor**: The name of the agency, organization, or company that is funding the research.

3 **Non-Funded Research Agreement**

NonFunded Research Agreement(Click on '+' to Add Agreement)				+
Agreement No:	Type	Status	Effective Date	
[ ] 🗗	–	–	–	✕
Expiry Date:				
–				
Title:				

Click here to delete

- o **Agreement No**: Non-funded research agreement number.
  Find the Non-Funded Agreement number using the advanced search 🗗 . For more details on how to use the advanced search function, see [Advanced Search](#).
- o **Expiry Date**: Date on which the non-funded research agreement expires.
- o **Title**: Non-funded research agreement title.
- o **Type**: Non-funded research agreement type (e.g., Material Transfer Agreement, Data Transfer Agreement).
- o **Status**: Review or execution status of the non-funded agreement.

Effective Date: Date on which the non-funded agreement took effect.

Advanced Filter

With the exception of **Search** on the Filter Header, all filter fields in UTRAC 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.

Select Recipient

Define Conditions: Full Name

Full Name

| contains ⌄ | Value | ✕ |

Add

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"

No Items or Conditions Selected

OK Cancel

Select Recipient Close

4. Click OK then Go to filter and view results.

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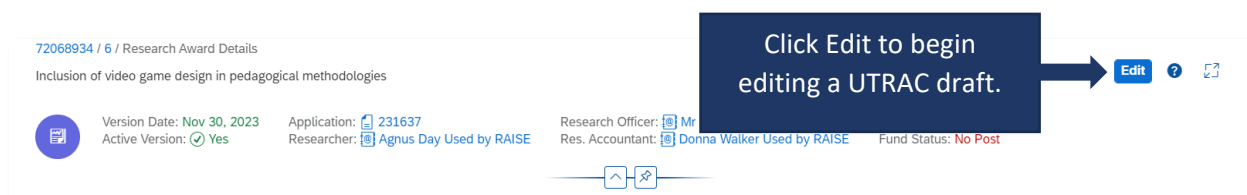
Tip: When you are editing a UTRAC draft, other users (e.g. other UTRAC creators/editors) will **not** be able to edit that same UTRAC. Even if you exit the UTRAC, the UTRAC draft will remain locked for editing for any other user other than you. If another user tries to edit the UTRAC draft, they will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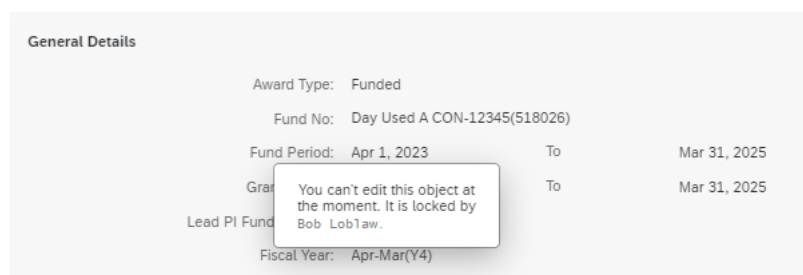
Auto-save

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.

Message that displays during auto-save
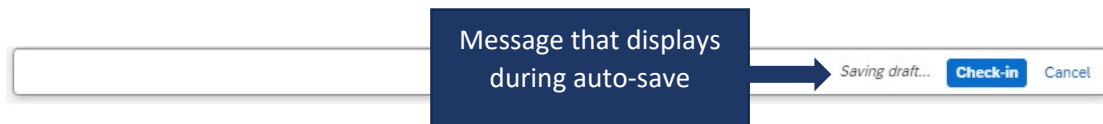
Check-in

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.

Click Check-in to unlock UTRAC for editing by other users.

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**.

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.
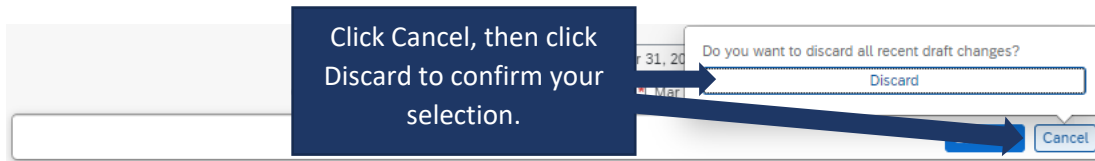

Validate

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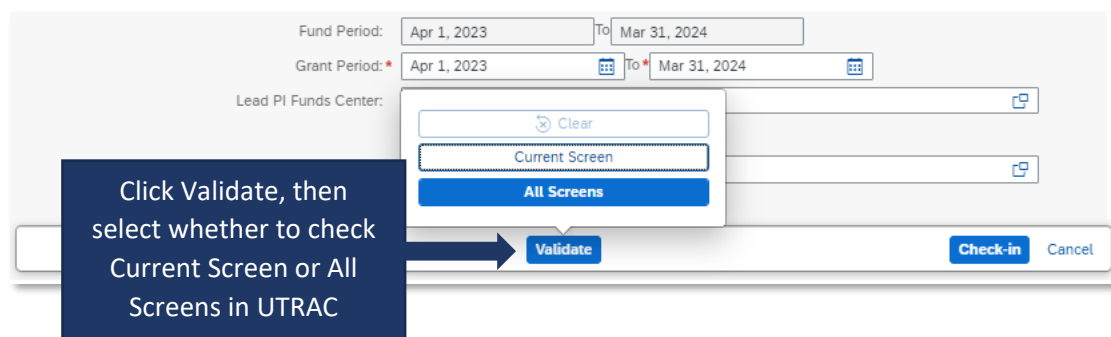
If you select **Current Screen**, any fields with errors on the screen will be highlighted in a red box. In addition, a ❌ flag in the left corner of the bottom toolbar will appear and display the number of errors on the current screen. Click the ❌ flag to display a summary of field errors on the screen.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

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.