

University of Toronto Research Account (UTRAC)

Page Help

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

Contents

Other Terms.....	2
Text Fields.....	4
Editing, Saving, Checking-In, and Cancelling Drafts.....	4
Validate	6

Other Terms

Use this page to enter information related to non-financial terms, such as intellectual property, equipment owners, publications, etc.

The screenshot displays the 'UTRAC Award Details' interface for award 72089048. The left sidebar lists various sections: Research Award Details, Sponsor Details, Financial Terms, Budget, Payments & Deliverables, Sub Awards, Other Terms (selected), Linked Funds & NFA, Protocols & Permits, Attachments, Publish, and Expense Reports. The main content area shows the 'Other Terms' section with five numbered callouts:

- 1**: Points to the 'Intellectual Property' tab.
- 2**: Points to the 'Equipment Ownership' tab.
- 3**: Points to the 'Publications' tab.
- 4**: Points to the 'Copyright' tab.
- 5**: Points to the 'Inventions' tab.

Each tab contains a rich text editor with a toolbar and two buttons: 'Reset' and 'Apply standard template'. Two instructional callout boxes are present:

- A blue box with an arrow pointing to the 'Apply standard template' button in the 'Intellectual Property' tab, containing the text: "Click here to auto populate field with U of T's standard template."
- A blue box with an arrow pointing to the 'Reset' button in the 'Equipment Ownership' tab, containing the text: "Click here to clear contents of the field."

The 'Publications' tab contains pre-filled text regarding the MSSC's expectations for research publication and acknowledgment. The 'Copyright' and 'Inventions' tabs are currently empty.

Other

6

B I U Paragraph [Formatting icons]

All other terms and conditions of this award are as stated in the Sponsor's Research Grant Program Guidelines <https://msociety.ca/library/document/UeTEAmktScdJyhgF0HqSD3U0nqIdO/original.pdf>

Comments Transactions

Validate Check In Cancel

- 1 **Intellectual Property:** Specifies ownership and any rights that the Sponsor and/or U of T may have to intellectual property generated as a result of the research award.
- 2 **Equipment Ownership:** Outlines which party (Sponsor and/or U of T) owns the equipment purchased using award funds and any residual rights or rules on disposal.
- 3 **Publications:** Specifies arrangements regarding publications that must be followed, such as acknowledgement of sponsor's support, provision of copies to the sponsor for informational purposes, advance copies for review, etc.
- 4 **Copyright:** Specifies ownership, any waivers of moral rights in favor of the Sponsor, or any other Sponsor and/or U of T rights.
- 5 **Inventions:** Specifies ownership and any rights the Sponsor and/or U of T may have to any invention as well as any special invention reporting requirements.
- 6 **Other:** Outlines any other relevant terms & conditions defined by the Sponsor or U of T.

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

To populate text fields with U of T's standard template content, click the "Apply standard template" button. To clear the contents of the text field, click the "Reset" button.

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.

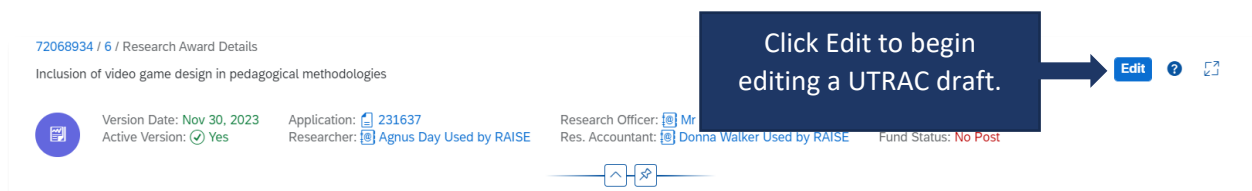
The following sections detail the system behaviours of working on a UTRAC draft.

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.

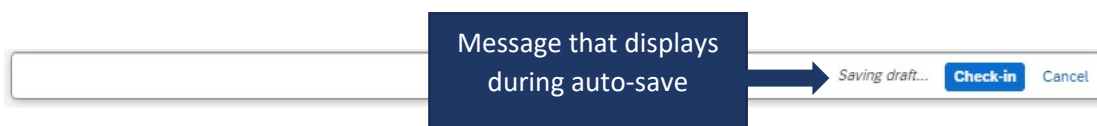
To unlock a UTRAC for editing by other users, you must **Check-in** the UTRAC. See [Check-in](#) section for more details.

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.



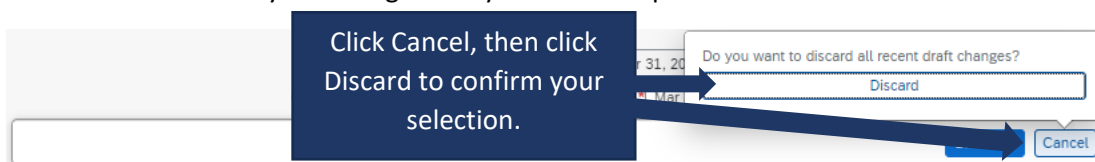
Cancel

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.

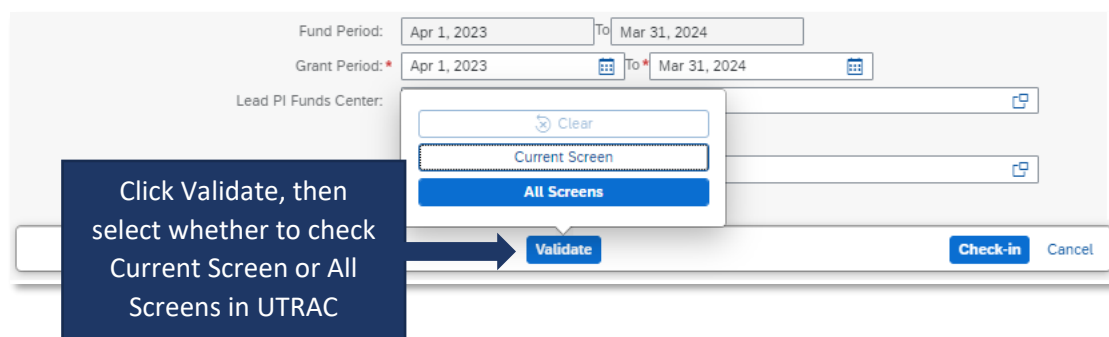




Validate

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.

The screenshot shows the 'Research Award Details' form for award 72069174. The form includes fields for Award Type (Non-Funded), Fund No (518231), Tropepe V, Fund Period (Apr 1, 2023 to Mar 31, 2024), Grant Period (MMM d, y to MMM d, y), Research Accountant (Donna Walker Used by RAISE), Research Officer, Cost Center, Internal Order, and Lead PI Funds Center (205404). A blue callout box with an arrow pointing to the 'Grant Period' field states: 'Click "X" to view error summary for the current screen. Fields with errors are highlighted.' Another blue callout box with an arrow pointing to the 'Research Officer' field states: 'Click "X" to view error summary for the current screen. Fields with errors are highlighted.' A third blue callout box with an arrow pointing to the 'Research Officer' field states: 'Click "X" to view error summary for the current screen. Fields with errors are highlighted.' A fourth blue callout box with an arrow pointing to the 'Research Officer' field states: 'Click "X" to view error summary for the current screen. Fields with errors are highlighted.'

Research Application | Research Award Details | Funds Center

Award Type: * Non-Funded

Fund No: 518231

Tropepe V

Fund Period: Apr 1, 2023 To: Mar 31, 2024

Grant Period: * MMM d, y To: * MMM d, y

Research Accountant: Donna Walker Used by RAISE

Research Officer: *

Cost Center:

Internal Order:

Lead PI Funds Center: 205404

Research Officer Required(*)

Grant from date Required(*)

Grant to date Required(*)

Apply/Remove No Post +

Validate Check-in Cancel

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.

The screenshot shows a pop-up box titled 'Error' with a close button (X). It contains two error messages, each with a red 'X' icon and a blue hyperlink 'Show more information'.

Error

Error in Sponsor Details
Screen [Show more information](#)

Error in Payments and Deliverables
Screen [Show more information](#)

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**.

The screenshot shows a 'Clear' button with a red 'X' icon, a 'Current Screen' button, and an 'All Screens' button. Below these buttons is a 'Validate' button. A blue callout box with an arrow pointing to the 'Clear' button states: 'Click Clear to hide all error messages on the screen.'

Clear

Current Screen

All Screens

Validate

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.