

# University of Toronto Research Account (UTRAC)

## Page Help

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

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### Publish

Use this page when you have finished creating and/or editing a UTRAC and you are ready to finalize it.

**Note:** Publishing a UTRAC will make it visible to the Researcher and other users with appropriate role authorizations, such as Research Accountants as well as Business Officers, Divisional Administrative Officers, and Unit Heads in the Administering Unit/Department under which the application/UTRAC has been set up.

The screenshot shows the 'Publish' section of the 'UTRAC Award Details' page. The page title is '72069030 / 2 / Publish Research Award Details'. The left sidebar contains a navigation menu with items like 'Research Award Details', 'Sponsor Details', 'Financial Terms', 'Budget', 'Payments & Deliverables', 'Sub Awards', 'Other Terms', 'Linked Funds & NFA', 'Protocols & Permits', 'Attachments', 'Publish', and 'Expense Reports'. The main content area has three tabs: 'Notes', 'Notification', and 'Recipients'. A blue banner at the top states: 'Publishing this UTRAC will make the UTRAC visible to the PI and other users with appropriate role authorizations. To publish the UTRAC, complete the Publish Notes and Notification details.'

Five callouts provide instructions:

1. Enter publishing notes here.
2. Enter notification subject & message here. This message will be sent to whomever you add in the Recipients section below.
3. Select the check box if you would like to notify the PI or the Research Accountant that this UTRAC is now published.
4. Click here to add additional Recipients. For tips on how to use advanced search, see [Advanced Search](#) section.
5. Click Publish and confirm to publish UTRAC. Once published, the UTRAC will be visible to PIs, Accountants, and research admins with access.

- **Notes:** Enter your Publishing notes in this field.  
*The content in this field can be a summary of the steps you have completed or not completed before publishing the UTRAC; e.g. "UTRAC set up and fund created. Period budget will be created when revenue is received from Sponsor."*
- **Notification:** You can use this section to send an email notification to one or more users when you Publish the UTRAC.
  - **Subject:** Add the subject header that will display for the email.
  - **Message:** Add the message you would like to display in the email body.

- **Recipients:** The individuals you indicate in this section will receive the notification with the Subject and Message you have entered in the sections above. You can select from one or more of the preset roles and/or add additional recipients from the U of T active directory.

**Note:** Only users with a @utoronto.ca e-mail address can be selected as recipients.

**Note:** The user who Publishes the UTRAC will receive a copy of the email notification sent to their @utoronto.ca email address.

- **Publish:** Once the UTRAC has been completed and is ready to publish, click the **Publish** button in the middle of the bottom toolbar. A confirmation button will be displayed. Click **Confirm** to publish the UTRAC, or **Cancel** to return to the UTRAC without publishing.

Publish UTRAC ?

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Publishing this UTRAC will make the UTRAC visible to the PI and other users with appropriate role authorizations

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## 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.

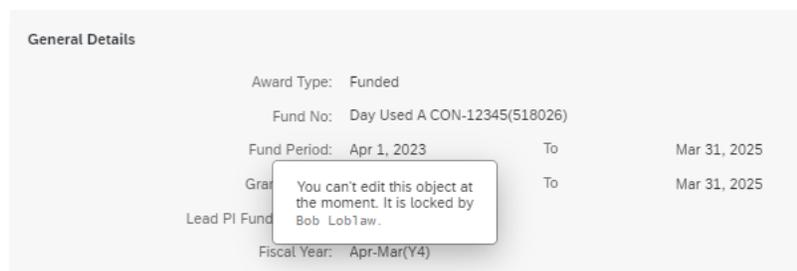
To begin editing a UTRAC, click the **Edit** button in the top right corner of the page to create a new draft of that UTRAC.

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.

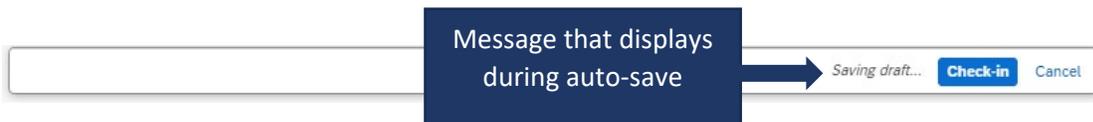


## Auto-save

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.

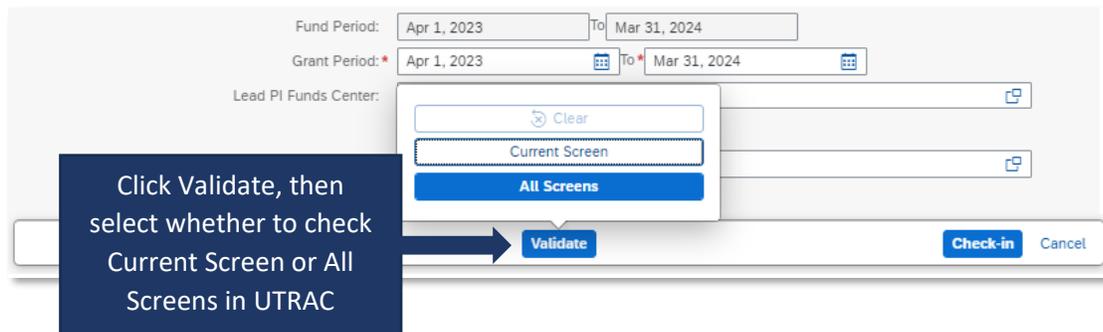


## Validate

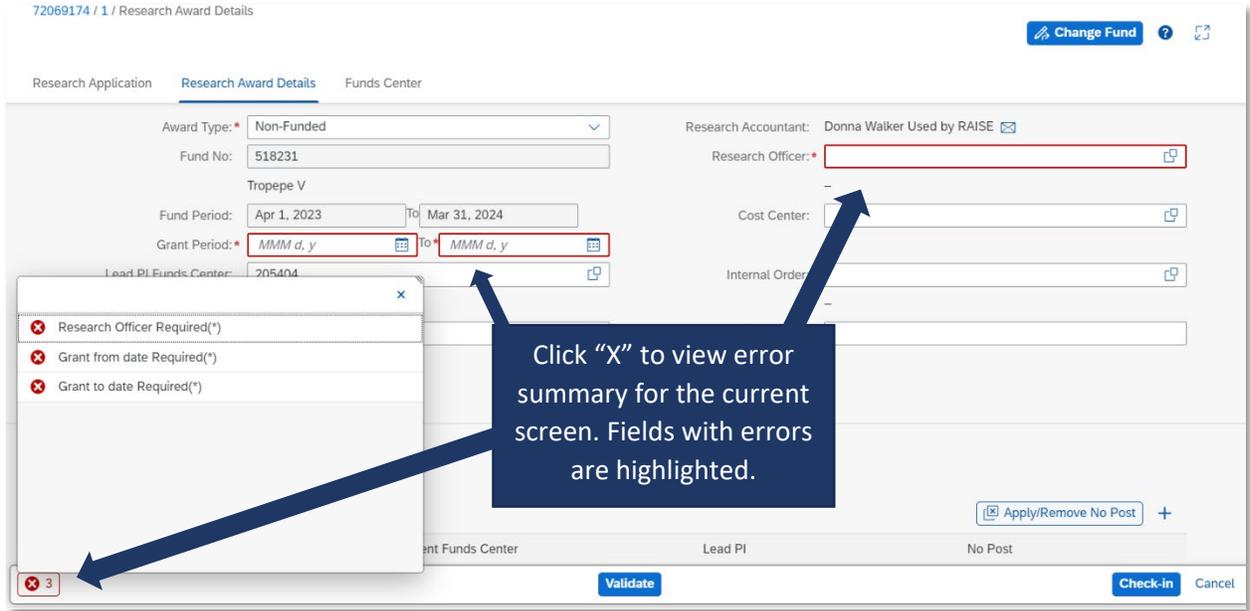
When a user is creating and editing a UTRAC, they can validate at any time that all required fields have been completed and that there are no errors.

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

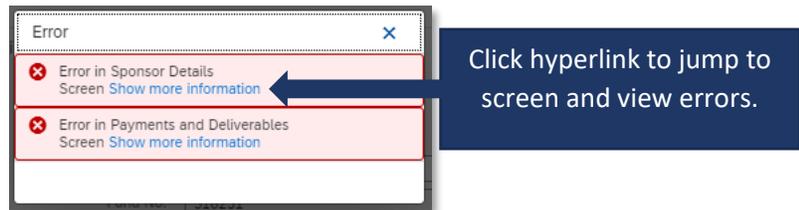
- **Current Screen:** Validates all fields on the screen you are currently viewing.
- **All Screens:** Validates fields on all UTRAC screens.



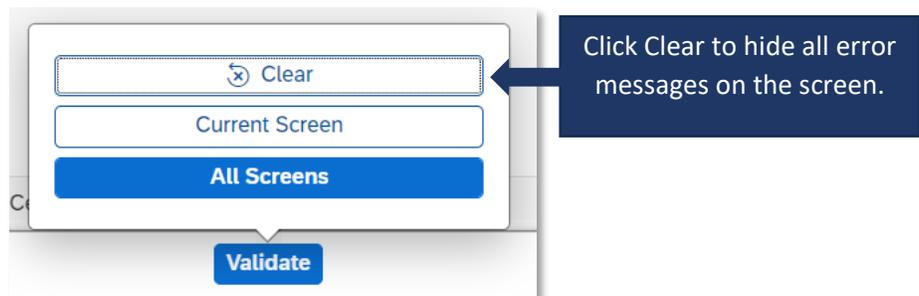
If you select **Current Screen**, any fields with errors on the screen will be highlighted in a red box. In addition, a **✖** flag in the left corner of the bottom toolbar will appear and display the number of errors on the current screen. Click the **✖** flag to display a summary of field errors on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

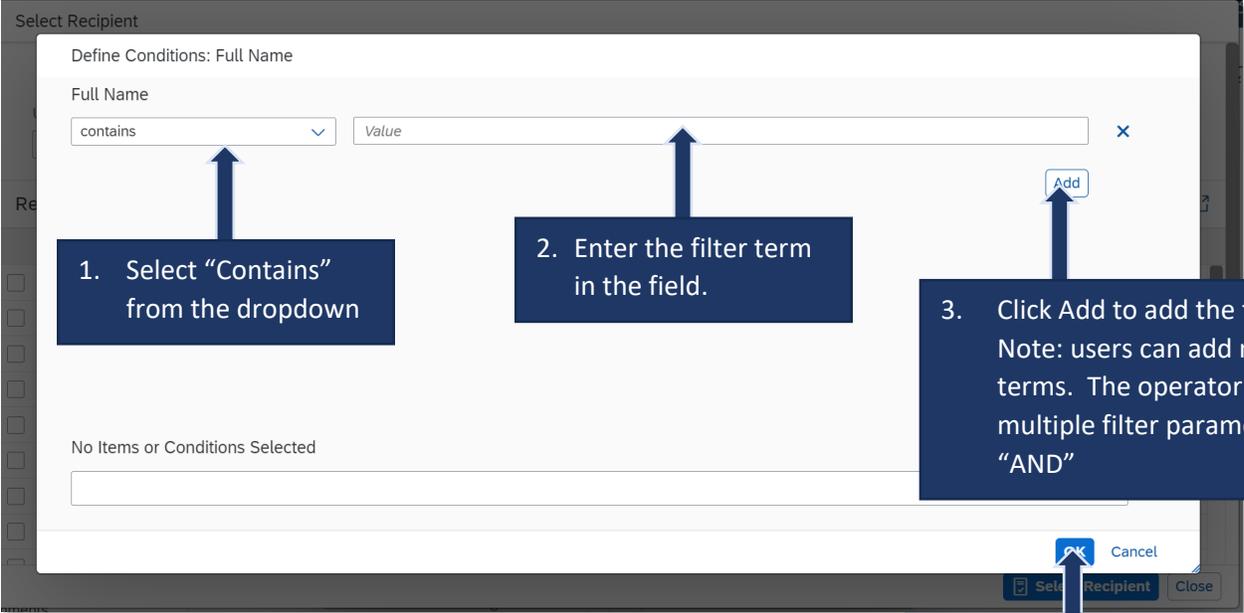


**Tip:** Validating for errors is a handy tool to check your work and you can use it as often as you need, or not at all. When you **Publish** a UTRAC, the system will always automatically validate the field data in the UTRAC and flag any errors for correction.

## 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.



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”

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