

# University of Toronto Research Account (UTRAC) Page Help

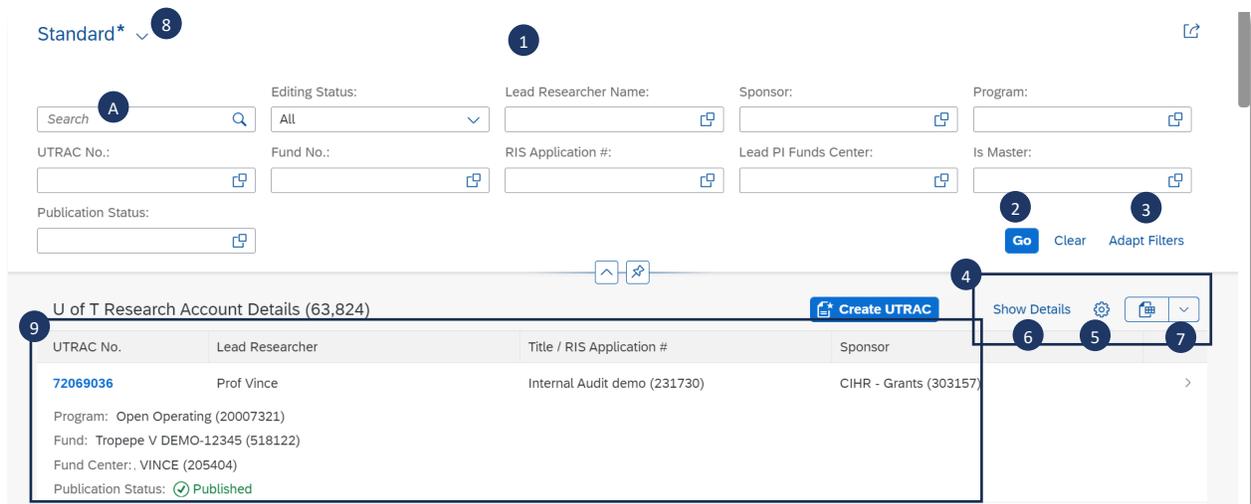
View the full [UTRAC user guide here](#).

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## UTRAC Search List

Users can access a list of UTRACs from the UTRAC Search List.



### 1 Filter Header

The following search and filter fields will be displayed by default in the filter header. Additional filters can be added or existing filters hidden using the **Adapt filters** button (see #3).

- **Search** (marked A on image): This is a general search field that will perform a keyword search on **all** fields.
- **Editing Status:**
  - i. **Own Draft:** Displays a user's own draft UTRACs (UTRACs not yet published)
  - ii. **Locked by Another User:** Displays all UTRACs that are currently in progress by another UAGER. These cannot be edited by other UAGers.
  - iii. **Unsaved Changes by Another User:** Displays all UTRACs with unsaved changes (lock expired, draft of someone is still available)

- iv. **Unchanged:** Displays all UTRACs that have no draft
- o **Lead Researcher Name:** Name of the primary researcher (i.e. Principal Investigator) on this research project.
- o **Sponsor:** The sponsor number for the agency, organization, or company that is funding the research. To search by sponsor name, click the  (double box) and use the sponsor name field.
- o **Program:** The program number under which the Sponsor will fund the research. To search by program name, click the  (double box) and use the program name field.
- o **UTRAC No:** Number assigned on creation of UTRAC.
- o **Fund No:** Fund number assigned in FIS.
- o **RIS Application #:** Unique identifier to the application assigned in RIS.
- o **Lead PI Funds Center:** Funds Center corresponding to the primary researcher.
- o **Is Master:**
  - i. Select Yes for UTRACs where the *Sponsor* is providing funding for multiple projects under a master agreement.
  - ii. Select No for UTRACs that are not a master agreement.
- o **Publication Status:**
  - i. **N:** UTRAC is not Published (draft status)
  - ii. **R:** UTRAC is published
  - iii. **V:** UTRAC has a new version

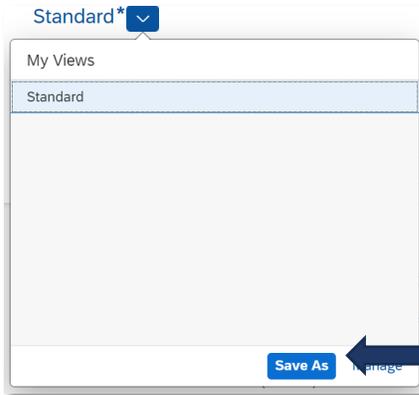
To set the filter parameters for each field click the advanced search  (double box) in the search field. For details on using advanced search, see the [Advanced Search](#) section.

2 **Go button:** After entering search terms, click the Go button.

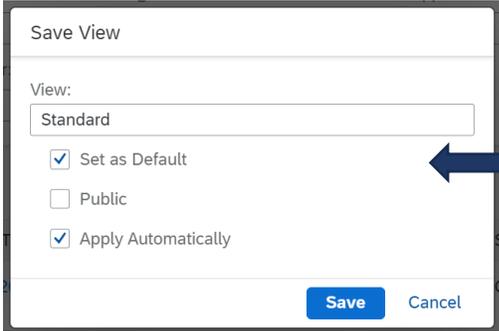
3 **Adapt filters:** Add additional filters or remove listed filters.

#### 4 **Research Award Details Table – Options**

- 5 **Settings:** Add additional columns or remove listed columns. Users can also shuffle the order of the columns using the arrow buttons 
- 6 **Show/Hide Details:** Show/Hide additional filters selected from the Settings button.
- 7 **Export:** Export UTRAC search results as an Excel file.
- 8 **My Views:** Users can personalize their own search filters and save them as a default view. To add/remove search filters, see # 3.



Click "Save As" to save new default view



Enter new name for view. Click "Set as Default" & "Apply Automatically".

**9 Research Award Details Table – Content Area**

Once you have set your search parameters and select "Go", the search results will display in the content area of the Research Award Details table. Once you have found the UTRAC you are interested in, you can access the Summary Screen for the UTRAC or open the UTRAC to view its contents.

UTRAC No.	Lead Researcher	Title / RIS Application #	
<a href="#">72065496</a>	Prof David	McLean Award (222981)	>
Sponsor: Connaught Fund (300743) Program: McLean Award (20002842)			

Click the UTRAC number to open and view UTRAC details

Click anywhere in the row to open the Summary Screen

## Summary Screen

### A General Details

- **Lead Researcher Name:** Name of the lead Researcher who is responsible for carrying out the funded research project.
- **RIS Application #:** Unique identifier to the application assigned in RIS.
- **Sponsor:** The sponsor number for the agency, organization, or company that is funding the research.
- **Program:** The program number under which the Sponsor will fund the research

### B Document Details

- **Created By:** Name of Research Officer who created the UTRAC.
- **Created At:** Date when the UTRAC was created.
- **Changed By:** Name of Research Officer who last modified the UTRAC.
- **Changed At:** Date when the UTRAC was last modified.

### C Versions

- **Version:** Version number (e.g. 1, 2,3, etc.)
- **Version Type:**
  - i. Original: First published version of UTRAC.
  - ii. Revision: Revised version of the original UTRAC.
- **Published:**
  - i. Yes: This version is published.
  - ii. No: This version is not yet published; it is of Draft status and is being edited by the Research Officer.
- **Published Date:** Date this version was published by the Research Officer.
- **Last Changed By:**

**D Settings:** Add additional columns or remove listed columns. Users can also shuffle the order of the columns . Settings will be saved to the user's saved view (see #8 – My Views).

**E Show/Hide Details:** Show/Hide additional filters selected from the Settings button.

**F Create Version:** Click this button to create a new version on a published UTRAC. See section on [Creating a New UTRAC Version](#) for more details.

72069036  
Internal Audit demo

Research Award Details Versions

**General Details** A

Lead Researcher Name:  
Prof Vince Tropepe Used by RAISE

RIS Application #:  
Internal Audit demo (231730)

Sponsor:  
CIHR - Grants (303157)

Program:  
Open Operating (20007321)

**Document Details** B

Created By:  
Mark Bold Used by RAISE (BOLDMARK)

Created At:  
Nov 22, 2023, 11:05:22 AM

Changed By:  
Mark Bold Used by RAISE (BOLDMARK)

Changed At:  
Nov 22, 2023, 11:37:04 AM

Versions

C

F
E
D

Version	Version Type	Active	Published	Published Date	Last Changed By	
2	Revision	✔ Yes	Yes	Nov 22, 2023	Mark Bold Used by RAISE (BOLDMARK)	>
1	Original	✘ No	Yes	Nov 22, 2023	Mark Bold Used by RAISE (BOLDMARK)	>

Click on the arrow to open the version.

## 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

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

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

## Creating a New UTRAC Version

Creating a new UTRAC version means that the UTRAC version number will increase by 1. For example, if the UTRAC is version 2.0, creating a new version means that version 3.0 will be created and any changes will be made in version 3.0.

To create a new UTRAC version, find the UTRAC in the UTRAC Search List and click anywhere on the row **except** for the UTRAC No. (blue hyperlink) to open the summary screen.

Standard\* v

agnus day x Q All Editing Status: Lead Researcher Name: Sponsor: Program: UTRAC No.: Fund No.:

RIS Application #: Lead PI Funds Center: Is Master: Publication Status: Go Clear Adapt Filters (1)

U of T Research Account Details (88) Create UTRAC Show Details

UTRAC No.	Lead Researcher	Title / RIS Application #	Sponsor
<a href="#">72068934</a>	Agnus Day Used by RAISE	Inclusion of video game design in pedagogical methodologies (231637)	Connaught Fund (300743)

Program: Connaught Start-up Grant (20002442)  
Fund: Day Used A CON-12345 (518026)  
Fund Center: MATTHEWS, STEPHEN (200127)  
Publication Status: Published

Click anywhere in the row (except UTRAC No.) to display the summary screen

Scroll down to the Versions table and click **Create Version**. This will create the next version of the UTRAC and open the UTRAC in Edit mode.

72068934  
Inclusion of video game design in pedagogical methodologies

Research Award Details Versions

General Details	Document Details
Lead Researcher Name: Agnus Day Used by RAISE	Created By:
RIS Application #: Inclusion of video game design in pedagogical methodologies (231637)	Created At: Nov 10, 2023, 10:45:58 AM
Sponsor: Connaught Fund (300743)	Changed By:
Program: Connaught Start-up Grant (20002442)	Changed At: Dec 2, 2023, 12:48:03 PM

Versions

Click Create Version to create the next UTRAC version for editing.

[Create Version](#) [Show Details](#)

Version	Version Type	Active	Published	Published Date	Last Changed By
6	Revision	Yes	Yes	Dec 2, 2023	
5	Revision	No	Yes	Nov 28, 2023	

New UTRAC version has been created.

Version 7.0 - active! [Change version](#)

You can begin editing the new UTRAC version. Once you have completed your changes, go to the Publish screen. You must enter a Note describing the changes you made in that version. Once you have completed the Note and (optionally) added a Notification message and recipients, click **Publish** in the bottom toolbar.

1. Click Publish to publish the new UTRAC version for other roles to see.

2. Add Note describing the changed you made in the new version.

Notes

Fund extension: Extended fund end date to Dec 31, 2024 as per no cost extension letter from the Sponsor

Notification

Comments

Transactions

Publish Validate

Check-in Cancel

**Tip:** To see the Revision Notes for previous UTRAC version, open a UTRAC in View mode and scroll down to the Versions section on the Research Award Details screen. Each previous version will include a preview of the note under **Revision / Published Notes**. To view the full note, click **Show More**.

Click Show More to view the full Revision / Published Note for that version.

Available versions for Research Award

Version	Created Date	Active Version	Published	Published Date	Revision / Published Notes
7 Revision	December 2, 2023	Yes	Yes	December 2, 2023	Fund extension: Extended fund end date to Dec 31, 2024 as per... December 2, 2023 <a href="#">Show More</a>
6 Revision	November 30, 2023	No	Yes	December 2, 2023	Changed assigned Research Officer December 2, 2023 <a href="#">Show More</a>
5 Revision	November 13, 2023	No	Yes	November 28, 2023	NoPo applied (check NoPo notes for details) as of November 30, 2023 <a href="#">Show More</a>