

UTREx

Quick Guide – High Level Cheat Sheet

Website: [USBE Data Gateway](#)

Support: All support and technical question should be submitted via email to the [UTREx help desk](#) or via phone at (801) 538-7800.

High Level Process:

1. **Log in to the Data Gateway.** After login, select “DC” from the dropdown menu. This will open a new window to the Data Collector (DC) portal, where you will run your data collection. Log in to the DC interface with the same user ID and password used to log into the Data Gateway.
2. **Start a collection.** Under the Collection Requests tab in the UTREx Clearinghouse section, click “Start Collection.” Check the box next to your data source under ‘SIF Zone’ (the top option) and click “Start Data Collection for all items checked below.” You can check the collection status from the “Collection Status” tab.
3. **Process Level 1 Validations.** Once the collection is complete, return to the “Collections Request” tab and choose “Validate.” Check for errors afterward by clicking “View Level 1 Validation Report.”
4. **Certify and submit the collection** by clicking “Certify” on the “Report Summary: tab. This sends the collection to the greater UTREx Clearinghouse for level 2 validation. *Please note that certification of a collection does not mean that you need to have a totally clean collection.*
5. **Check exceptions and run reports** in the UTREx Clearinghouse portal using the navigation buttons on the left sidebar. To access this portal, select “UTREx” from the dropdown menu when logging into UTREx.

Login Tips:

- Passwords must be at least 7 characters and must include a capital letter and a number.
- Login information is the same for both portals.

Flat File Collections: As of October 1, 2013, UTREx is no longer capable of collecting flat files.