Transcript - Preparing a Research Training Dataset for a New Application

Welcome to this video tutorial on Preparing a Research Training Dataset, or RTD, for a New Application using xTRACT. One of the goals of xTRACT is to provide applicants with a convenient means of creating training data tables for applications while also leveraging information that already exists in eRA Commons.

Accessing xTRACT in eRA Commons

If you are a principal investigator, or assistant, you access xTRACT by logging into eRA Commons. From the landing page, click on the apps menu icon in the upper left corner. From the menu, select xTRACT.

From the xTRACT landing screen, click on the **New Applications** tab. This opens the Search Research Training Data Sets for New Applications screen. This screen allows you to search for existing RTDs for new applications. They are then displayed in the RTDs of New Applications table.

Initiating a New RTD for an Application

Along the left side is the navigation pane. Click the Initiate RTD for New Application to start the process. This opens the Initiate New RTD – Application Details screen. Complete the form by providing a project title, which is required. An optional description can also be added as well as the Notice of Funding Opportunity Number, NOFO. The other required field is your institution name. If it is applicable, use the checkbox for "This RTD is for an Undergraduate Training Grant Application i.e. T34." Once the fields are completed, click Initiate RTD in the lower right corner.

Application Details Screen

The system refreshes the screen and confirms you have successfully initiated a new RTD. It assigns a system generated New RTD number. The Application Details section is where you can add names of any additional PIs to the Project. Any PIs added to the project will have read access to the RTD information. You can also update the description and Opportunity Number. Click Save in the bottom right corner when you are done.

The screen refreshes with a success message. You should also note that the left navigation pane has expanded to guide you through the process of completing all the information for the RTD.

Note that back on the RTD Search Screen for New Applications, the RTDs of New Applications now shows the RTD with a Status of In Progress. Click on the RTD ID number to access the Application Details screen.

Participating Departments/Programs Screen

The next step of the RTD is to define any participating departments or programs by clicking the Participating Departments/Programs link. The screen updates with two sections: the Partner Organizations section and the Participating Department and Programs section.

Adding a Partner Organization

To add an organization that you are partnering with on the project, click the Add Partner Organization button. This opens the Add Partner Organization window. The required organization field is a type-ahead field. As you type in characters for the name of the organization, the system displays all possible matches.

Add appropriate characters or scroll through the options until the desired name is displayed. Click on the name of the partner organization. Then click Save.

The Participating Departments/Programs screen is updated with a success message and the partner organization is listed.

Adding Participating Departments and Programs

You can search for departments and programs to add to the RTD by clicking the Participating Departments or Programs button. This opens the Add Participating Departments and Programs search form. If you wish to enter a department or program from a partner organization, first select the organization from the menu. If you wish to select from your own institution, leave this field blank.

Enter a department or program name or just start typing a word. The system dynamically searches for matches. Click on the appropriate result. Departments are noted by the triangle at the end of the name, programs by a dot. Click ***Save*** to add the Department or Program to your RTD.

The Participating Departments/Programs screen is updated with a success message and the department or program is listed.

Creating a New Program

If a program that you are looking for is not found from the Add Participating Department and Programs window, you can create it by clicking the **create one** link. This opens a new version of the form so you can add a program name, which is required, and an optional program description. Finish the process by clicking the ***Save*** button.

The Participating Departments/Programs screen is updated with a success message and the program is listed.

Actions for Departments and Programs

You can use the three-dot ellipses icon in the Department or Program Name column to access the available actions. The available actions for Departments are Edit Census and Remove Department. And for Programs, the available actions are Edit Census, Edit Program Name, and Remove Program. For both Department and Program, edit Census allows you to add or update the numbers for faculty, pre-doctorate, and post-doctorate participants.

Edit Program Name lets you update the name and description of the program. The remove option for both deletes the department or program from the RTD. This action requires a confirmation by clicking Delete on the confirmation window.

Training Support & Summary Screen

Moving down the side navigation pane to the next option, you find the Training Support & Summary link. Here you provide information about existing support for research training at your institution.

Summary Statistics Section

Summary Statistics are calculated when the subsequent parts of the RTD are completed. The small information icon to the right of each category provides additional information when you hover the cursor over it.

Adding Institutional Support

The Institutional Training Support Detail section lets you list additional sources of support for research training at your institution. Clicking on the Add Institutional Training Support button allows you to search for other awards at your institution. Type in the desired search criteria and click the Search Funding Sources button. The system returns the search results. From the list you can include the NIH source of support that applies to you by clicking on the Plus icon in the Grant Number column. This adds the information on training support to the RTD.

The Training Support & Summary screen is updated with a success message and the Institutional Training Support Detail section is updated with the new information.

Census Totals Section

Next, complete the Census Totals section. Click the Edit button to open the Faculty Census Totals form. List the total number of faculty members from all the participating departments and programs, then add the number of faculty who will actively participate in your project. Click ***Save*** to complete the process.

Participating Faculty Screen

Adding Participating Faculty works in the same manner as other processes for assigning people to your project. Click Add Faculty and then complete a search for desired people using the Search for Faculty screen. You may then add faculty from the returned results by clicking the checkbox in the Add to RTD column. When done, click the ***Add Person(s)*** button at the bottom of the screen. Returning to the Participating Faculty Members screen, you will see that the selected faculty member has been added.

Participating Students Screen

Adding students and or post-docs participating in the training program is almost the same process as adding faculty with one additional step. On the Add to RTD column, you must then select from the Add Student as menu. The options are Pre-Doctoral or Post-Doctoral. Click the Add Person(s) button when done. Returning to the Participating Students screen, you will see that the selected student has been added.

Adding Faculty and Students in Bulk

Both faculty and students can be added in bulk if you have a large number of names to add to either category. In the participating members table, next to the Add button is a link: Upload Participating Faculty or Upload Participating Students. Both options work in the same way, so for this demonstration we will use the Upload Participating Students link.

Clicking the link opens the Upload Participating Student screen. On this screen you download a template to fill out with trainee data and then upload it into xTRACT. Click the tab-separated (TSV) text template file link below the left corner of the file drop zone area.

You fill in the Participating Student Dataload Template.txt file with the trainee information. It is very important that you review the instructions provided in the notes box on the Upload Participating Student screen by clicking the Show More link. This expands the notes to provide you with detailed instructions on how to best use the template file.

When you have completed filling in the template, you upload it to xTRACT by dropping the file in the drop zone or use the browse link to navigate to the file. Once you select the file, xTRACT checks for errors. If errors are found, you see a dialog window with detailed information about each error. All errors must be corrected to successfully upload the data.

When no errors are found, you see the Upload Confirmation screen. Click Proceed to complete the process. You see a success message on the upload screen. And you see the new trainees in the Participating Students table.

Applicant and Entrants Screen

The final section of the RTD is the Applicants and Entrants section. Here you will add of the applicants and entrants to your training program for the last five years. The process starts by designating the start year of the most recently completed academic year. Type in the appropriate year and click submit. Once this step is completed, the Edit Pre-Doc Applicants and Entrants and Edit Post-Doc Applicants and Entrants links become active.

Both links work in a similar way. There are numerous academic years listed across the top. Click on the academic year for which you want to add or make changes to the count. For Pre-Doc Applicants and Entrants there is the Counts for Department or Program.

Click on the counts bar to expand it. The Department or Program Counts table is displayed. To make changes, click Edit. When you are done, click the Save Counts button to save the changes. A success message is displayed at the top of the screen.

For Post-Doc Applicants and Entrants there is the Counts for Degree Types. Click on the counts bar to expand it. The counts for degree types table is displayed. To make changes, click Edit. When you are done, click the Save Counts button to save the changes. A success message is displayed at the top of the screen.

Data can be added for each academic year, using the tabs that run along the top of the Pre- doctoral Applicant and Entrant Counts and Characteristics screen. The Summary Tab, which appears after the individual academic years, shows a summation of the data that has been entered across the individual academic years.

Preview the RTD as a PDF

The next step is to review the RTD by clicking the Preview PDF link. This generates a PDF of the training data tables, watermarked with the words “In Progress,” and the PI’s name. Once satisfied with the results, you can complete the entire process by clicking the Finalize RTD link. This will create a PDF without the “In Progress” watermark which can the be used when submitting a new application and it sets the status to Finalized.

Resources

There are a number of resources available to help with xTRACT if you need them:

- xTRACT Reporting Web Page
  https://www.era.nih.gov/recipients/submit-reports/xtract.htm
- xTRACT Overview
  https://www.era.nih.gov/help-tutorials/xtract/overview.htm
- xTRACT Online Help
  https://www.era.nih.gov/erahelp/xtract
- xTRACT FAQs
  https://www.era.nih.gov/faqs.htm#XX

If you still need assistance with xTRACT, contact the eRA Service Desk.
https://www.era.nih.gov/need-help

This concludes this video tutorial on Preparing a Research Training Dataset, or RTD, for a New Application using xTRACT. Thank you for watching.