Transcript – xTRACT for RPPR

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Welcome to this video tutorial on xTRACT. This tutorial reviews how to use xTRACT to prepare your training tables for a Research Performance Progress Report (RPPR).

Accessing xTRACT in eRA Commons

If you are a signing official, 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 **Training Grants** tab. The first step is to find the grant for which you need to either initiate a Research Training Dataset, referred to as an RTD, or continue working on an RTD that was previously initiated.

Key in your search criteria, taking note that you can use the percent character to perform a wildcard search of desired fields. Click the **Search** button. The search results are displayed in a table showing the Grant Number, Grant Status, PI Name, Project Title and RTD Status.

In the search results table, you find the available actions by clicking the three-dot ellipses icon in the Grant Number column. For this tutorial we are selecting the ***Prepare for RPPR***, thus initiating a new RTD for an upcoming RPPR. Clicking on the option opens the Prepare an RTD for RPPR screen.

The top area is simply confirmation of the grant information, including the Grant Number, Project Title, Contact PD/PI, and RTD Reporting Period. Along the left side is the navigation pane, allowing you to move through various components of the RTD.

Adding Trainees to the RTD

In the navigation list on the left is **Participating Trainees**. This screen displays the current list of trainees assigned to the project.

You can add a person by clicking the **Add Trainee** button in the bottom right of the screen. This opens the Search for Trainees window. Using one of the following: Commons ID, Person ID, or Last Name, you can search for an existing Commons user. The “Search for persons who have a Commons affiliation with my institution” checkbox filters the search just for those users affiliated with your institution. Unchecking this box allows the search to look for accounts outside your institution as well as those affiliated with it.

Add your search criteria and click the Search Persons button. If no match is found for the information provided for the search, the system presents a message at the top of the window and provides a **create a new xTRACT Person record here** link. Clicking this presents the Create xTRACT Person as Participating Trainee window. Complete the required fields and click the Save button.

If you want to add the person to the list, click Confirm on the Confirmation window. Upon returning to the Participating Trainees list, you see a Success message at the top of the screen. In the table, you see that the person you’ve created has been added to the list and a trashcan icon can be used to remove the name from the list.

Performing a Bulk Upload of Trainees

If you have a number of trainees to add to your RTD, you can use the bulk upload feature of xTRACT. At the bottom of the Participating Trainees table, click the Upload Participating Trainees link.

This opens the Upload Participating Trainee 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 Trainee 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 Trainee 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 in order 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 Trainees table.

Updating Trainee Information

If you need to update the information on a trainee, click the trainee's name. This opens the Participating Trainee Details form. An important message is displayed stating that the Start Date into Postdoctoral Research, and if applicable, the End Date fields must be completed to finalize the RTD.

Click the Edit button to make these changes. The Edit In Training Data window opens. Update the desired information and click Save. The RTD for RPPR screen is updated with a success message.

The rest of the Participating Trainee Details screen is divided into various tiles by category. Each tile can be expanded by clicking on it, permitting you to update the information for that category.

For example, opening the Degrees tile allows you to use the **Add Degree** button to update the information for this section. Once completed, click the **Save** button.

Providing Program Statistics

The next part of the RTD is the Program Statistics link. Clicking this allows you to add or edit the required statistics for predoctoral training programs. The required statistics are the percentage of trainees who completed the PhD within ten years and the average time, in years, for trainees to complete the PhD. Clicking the Save Program Statistics button adds the data to the RTD.

Preview the RTD as a PDF

The next option on the navigation of the RTD is the Preview PDF link. This generates a PDF of the training tables of your RTD for you to review. It provides the opportunity to check to make sure the information you entered, as well as that drawn from the NIH database for the RPPR is correct.

Finalize the RTD

When you think you have completed all the information for the RTD, you can go to the next link of the navigation options: the ***Finalize RTD*** link. This link is available to the PD/PIs on the grant, or their delegated assistants.

When you click the link, the system checks for errors. You may see a message that required information is not entered. Clicking the OK button acknowledges you see the error message, and the status of the RTD does not get set to Finalized. You must first address the errors before the RTD can be finalized.

You can also receive a warning message if some less critical information is missing. It is up to you to address the warnings or not.

Once all the missing information has been completed, you can finalize the RDT. If no errors or warnings are found, you see a success message.

Once the RTD is finalized, xTRACT generates a PDF version of the training tables without the *In Progress* watermark, updates the status of the RTD to Final, and locks the RTD from editing. It is then ready to be attached to your RPPR.

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 tutorial on how to use xTRACT to prepare your training tables for a Research Performance Progress Report (RPPR). Thank you for watching.