Transcript – xTRACT for RPPR

*********************DISCLAIMER!!!*********************

THIS FILE MAY CONTAIN ERRORS. THIS IS NOT A LEGAL DOCUMENT AND IS NOT FOR USE IN A COURT OF LAW.

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

After logging into eRA Commons, click the **xTRACT** tab at the top navigation bar. From here, 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, making note that you can use the percent character to perform a wildcard search of desired fields. Click the **Search** button. The spinning pinwheel indicates that the system is gathering the search results for you.

With the search complete, you will see various link options in the Action column. For this tutorial we will select the ***Prepare for RPPR***, thus initiating a new RTD for an upcoming RPPR. Clicking on the link opens the RTD for RPPR information page, starting with Basic Information.

Basic Information 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.

Next on the list 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. This opens the Search for Person(s) form. 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 will allow for the search to look for accounts outside your institution as well as those affiliated with it.

If no match is found for the information provided for the search, the system will present the **Create xTRACT Person** button. Clicking this will present the Create xTRACT Person form. Completing the form, clicking the create button, and following the prompts will finish the process for you. Upon returning to the Participating Trainees list, you will see that the person you've created has been added to the list.

Each column can be used to sort the data by the category you want. It also allows you to update information by clicking the ***Edit*** link, or remove the trainee from the project by clicking the ***Remove*** link.

If you need to update the information on a trainee, click the **Edit** button. This opens the Participating Trainee Detail form. Each tile can be expanded by using the **VIEW** button, permitting you to update the information for that category.

For example, opening the IN TRAINING DATA tile allows you to use the **Edit** button to update the information on the In Training Data form. Once completed, click the **Save** button.

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 Ph.D. within ten years and the average time, in years, for trainees to complete the Ph.D.. Clicking the **Save Program Statistics** button adds the data to the RTD.

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.

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*** link. This link is available to the PD/PIs on the grant, or their delegated assistants.

When you click the link, a message will appear confirming you want to finalize the RTD. This is important because once the RTD is finalized, it cannot be edited again. If you click the Yes button to confirm, you may get an error message.

This error message will appear if the required information is not entered. Clicking the **OK** button acknowledges you see the error message and does not set the status of the RTD to *Finalized*. You must first address the errors before the RTD can be finalized.

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 for editing. It is then ready to be attached to your RPPR.

This concludes this tutorial on using xTRACT to prepare a RTD for a Research Performance Progress Report. For more information on xTRACT, be sure to check out the entire series of video tutorials. Thank you for watching.