Transcript - Preparing a Research Training Dataset for a New Application

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Welcome to this 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.

After logging into eRA Commons, you will click on the xTRACT tab on the top navigation bar. From there, click on the New Applications tab, and along the left side, click the “Initiate RTD for New Application” link.

This will open the Prepare New Research Training Dataset form. The Principal Investigator, PI, completes the form by providing a project title, which is required. An optional description can also be added as well as the Funding Opportunity Announcement or FOA. Click Save to initiate the RTD.

After clicking save, the system confirms you have successfully initiated a new RTD and assigns it a system generated New Data Set Identifier number. The Basic Information form is where the PI can add names of any additional PIs to the Project. Any PIs added to the project will have read access to the RTD information.

The next part of the RTD is to define any participating departments or programs by clicking the Participating Departments/Programs link. You can search for departments and programs to add to the RTD by clicking the add button. This opens the Add Participating Departments and Programs search form. Enter a department or program name, or just start typing a word. The system dynamically searches for matches at your institution. Click on the appropriate result. Click ***Save*** to add the Department or Program to your RTD.

If a program is not found, you can create it by clicking the **create one** link. This expands the form so you can add a program name, which is required, and an optional program description. When you are done, click the ***Create Program and Select as Participating in my RTD*** button. Finish the process by clicking the ***Save*** button. You will see the Department and Programs listed on the RTD.

Moving down to the next option, you will find the Training Support & Summary link. Here you will provide information about existing support for research training at your institution. The first section, Summary Statistics, will be calculated when the subsequent parts of the RTD are completed. The small plus sign to the right indicates that if you click on the blue bar, the section will expand showing the details.

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 will return the search results. From the list you can include the NIH source of support that applies to you by clicking on the Select link. This adds the information on training support to the RTD.

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.

Next you will add Participating Faculty. This 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 Persons screen. You may then add faculty from the returned results by clicking the Add Faculty link. When done, click the ***Done*** button at the bottom of the screen. Returning to the Participating Faculty Members screen, you will see that the selected faculty have been added.

Adding students and or post-docs participating in the training program is almost the same process as adding faculty with one additional step. When you click the ***Add Student as*** link, you must then select the Student Type, Pre-Doctoral or Post-Doctoral.

The final section is the Applicants and Entrants section. Here you will add counts and characteristics 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 Pre-Doc and Post-Doc Applicants and Entrants links will become active.

Both of these links work in a similar way. For both Pre-Doc and Post-Doc links, there are numerous categories. For each category, you will click the edit button, then add the requested information. When you are done, there will be a save button to save the information for that category.

However, for Prior Institutions, there is not an “edit” button for this section. You can add institutions to the list of prior institutions by typing the name in the Institution field. The system will begin to dynamically match your input with results. Find the institution you want and click it. Add the number of new entrants and the number of new entrants eligible for support. When you are done, click the ***Add Prior Institution*** button to add it to the RTD.

You will then see the institution displayed with the characteristics that were entered, along with Edit and Remove links that they may use to change this information at any point.

Data can then 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.

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.

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