TRACS PDF Formatting Tips Job Aid
Updated 2/10/2023

The TRACS Working Group is considering future revisions and formatting changes to the TRACS PDF templates. In the meantime, this job aid provides some tips to fix formatting issues in the current PDF generated from TRACS.

PDFs are available for the following performance records in TRACS:
- **Grant Proposal PDF** (which includes all Project Statements)
  - Note that a PDF is not currently available for an individual project statement
  - The Grant Proposal PDF is available on the Grant list page, Project Statements list page, and Project Statement Approval page
- **Interim Performance Report PDF** (which includes all project statements in the interim period of performance)
- **Final Performance Report PDF** (which includes all project statements in the final period of performance and a summary table for all periods of performance)
- PDFs are also available for Facility and Real Property Records in the Inventory Module

Use the Text Editor

Some fields require entry of narrative text and have a pop-up text editor window that opens when you click in the field.

- The text editor box allows users to format the text, links, and tables. The text editor has a variety of formatting tools including from left to right: Bold, Underline, Italicize, Text Color, Highlight, Font Size, Paragraph Tools, Paragraph Styles, Alignment, Undo/Redo, Bullet Points, Numbering, Indent Tools, Links, and a Table Builder.

- Images will not display in the text editor, and they will not copy/paste over with the text – instead any images or photos should be added as attachments.
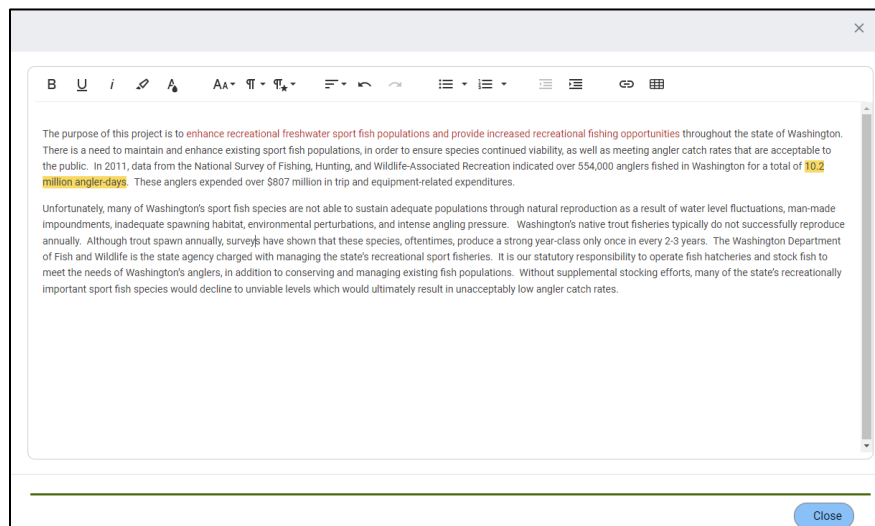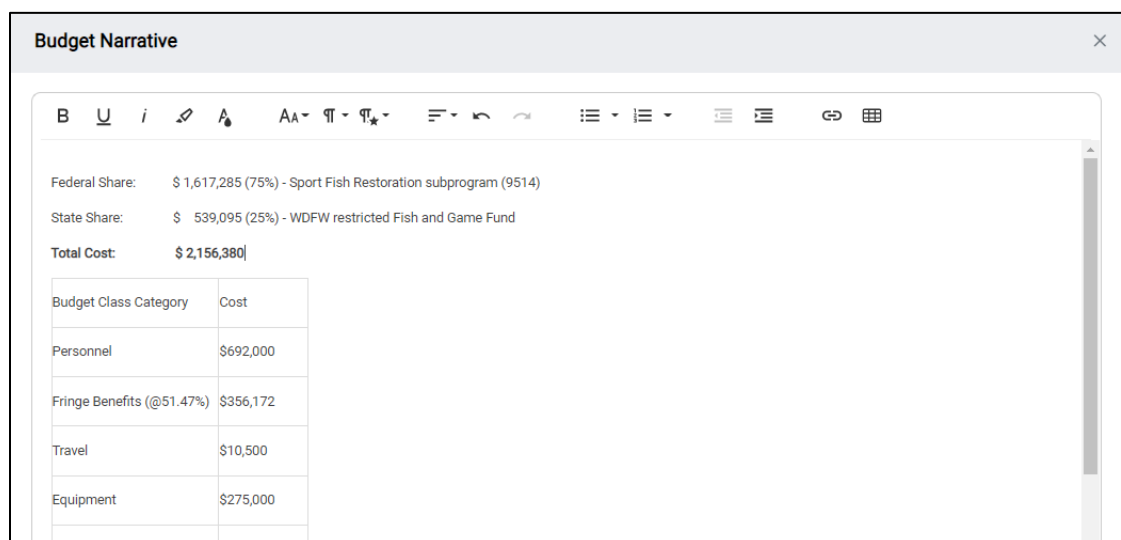
Text Editor and PDF Formatting Tips

1. **Use a Word document to copy and paste:** Copy and paste from a Microsoft Word document whenever possible. Formatting issues are more likely when copying and pasting from other sources, such as PDFs, webpages, etc.

   Tip: In your Word document format all text to copy and paste into TRACS with **Roboto Font in Size 9**. Note: Text typed directly into a text box displays as Roboto size 10.5 in the application but will shrink to size 9 in the PDF output, so use size 9 for consistency.

2. **Select "Clean" when pasting from Word:** Pasting from a Microsoft Word Document opens the formatting window with option to keep the formatting from the original document or clean it up. "Clean" means that extra characters, white space, text colors and highlights from the text will be removed (but it may not change the font or size). This option does not appear when pasting from a source other than Microsoft Word, such as a PDF or webpage).
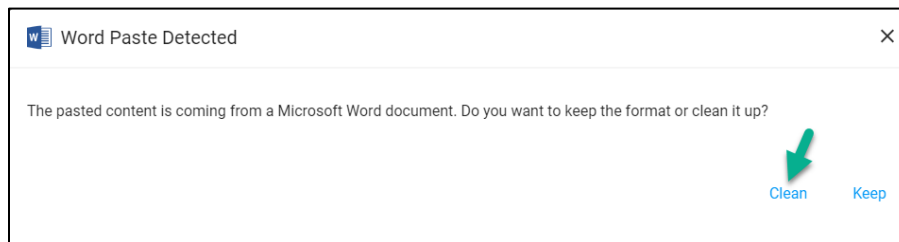
3. **Copy/Paste a Table:** A table may be pasted into the text editor (or use the table tool to create a table). Tables will copy and paste best from Word or Excel files.


   Note: an Excel table that is embedded into a Word document will need to be opened in the Excel format to enable pasting (double-click on the embedded table to open it).

Check the PDF for Formatting Issues to Fix in the Text Editor

1. Check the PDF output for any formatting issues that need to be fixed in the text editor, such as mismatched fonts and sizes, paragraph alignment issues and extra spaces.
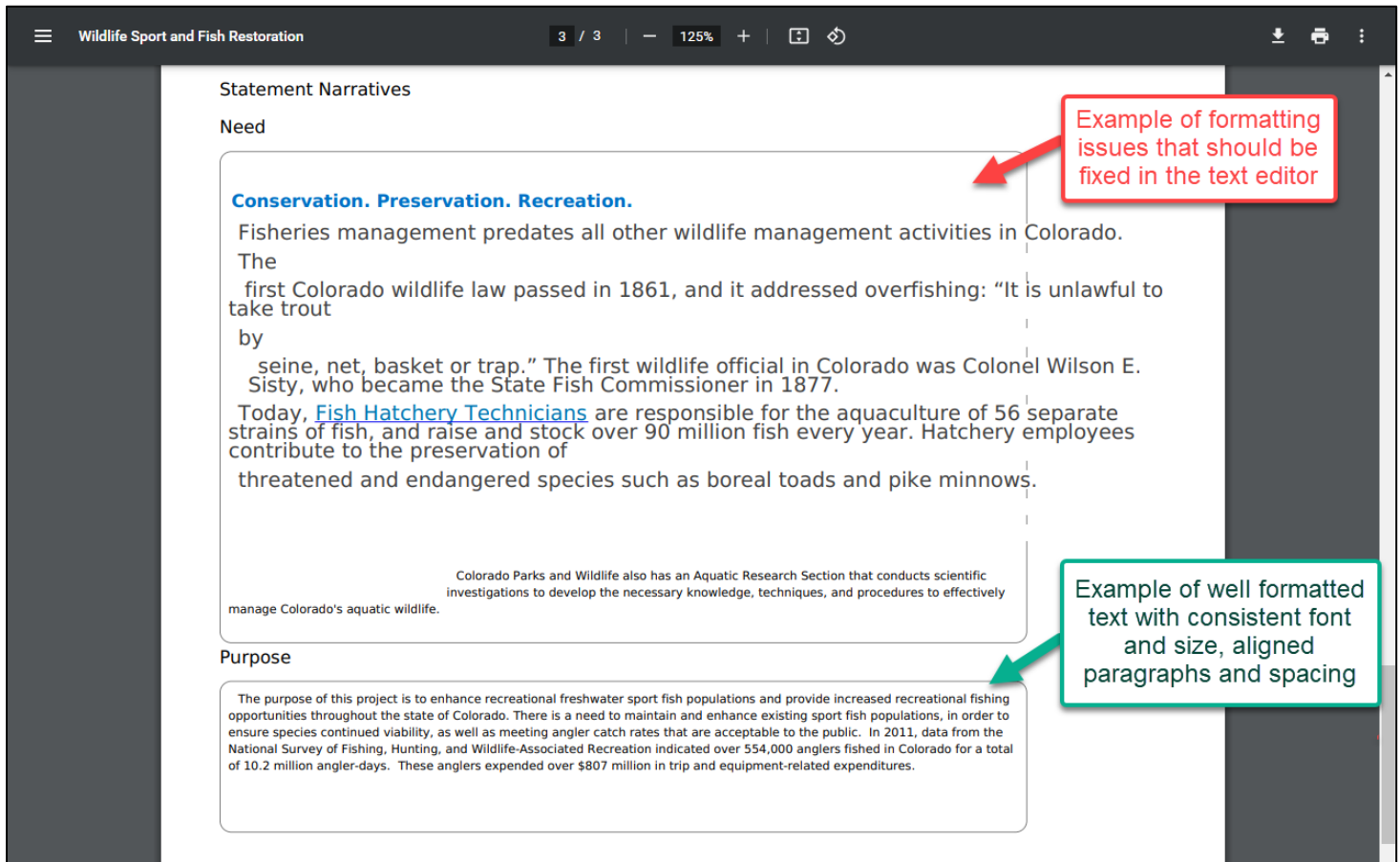
2. **Fix Formatting in Word** by copying the text that has formatting issues to a new Microsoft Word document.

3. Clear all text formatting in Word by **Selecting all text** and go to the **Home** tab, in the **Font** group, and click **Clear All Formatting**. Then change the font to **Roboto size 9.**
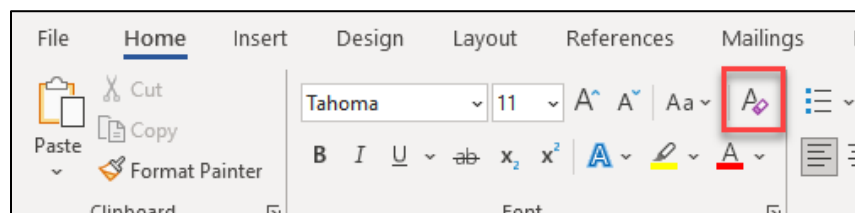
4. Fix any formatting or spelling issues on the Word document before copying and pasting back into the text box in TRACS. Make sure to remove extra spaces between lines and paragraphs. Review the PDF again to ensure all formatting issues have been resolved.