
ERA National Institutes of Health

Xtrain ver 2.0 Use Case Story Board (Electronic 2271 Form)

Version 1.3

Prepared By:



RNSolutions Inc.
3206 Tower Oaks Drive
Suite 100
Rockville Maryland 20852

Prepared For:

The National Institutes of Health
Office of Extramural Research
6705 Rockledge Drive
Rockville MD 20817

	Version: 1.3
Use Case Story Board – X-train	Date: 4/9/2003

Revision History

Date	Version	Description	Author
February 20, 2002	1.0	Initial Draft	Steve Fitzgerald
March 12, 2003	1.1	Changed sort order, modified diagram, minor format changes.	Steve Fitzgerald
April 6, 2003	1.2	Removed requirement for showing Xtrain logo on all screens. This is not per Commons screen standards. Modified navigation diagram to account for new use case, (select grant.) Select grant becomes select project, and select grant becomes a new use case that is utilized after the project is selected. Changed system text on search grant page to specify awarded training grants.	Steve Fitzgerald
April 9, 2003	1.3	Modified Screen Flow Diagram	Steve Fitzgerald

	Version: 1.3
Use Case Story Board – X-train	Date: 4/9/2003

Table of Contents

Introduction	4
Xtrain Navigation Summary	4
ERA COMMONS Login Page	5
Application Selection Screen	6
Grant Selection Screen	7
Roster of Trainees Screen	8
Create New Trainee Roster Screen	9
Race/Ethnicity	10
Address	11
Education	12
Field of Training	13
Specialty Boards	14
Period of Appointment	15
Stipend	16
Federal Debt Indicator	17
Appointment Summary Screen	18
Amendment Selection Screen	19

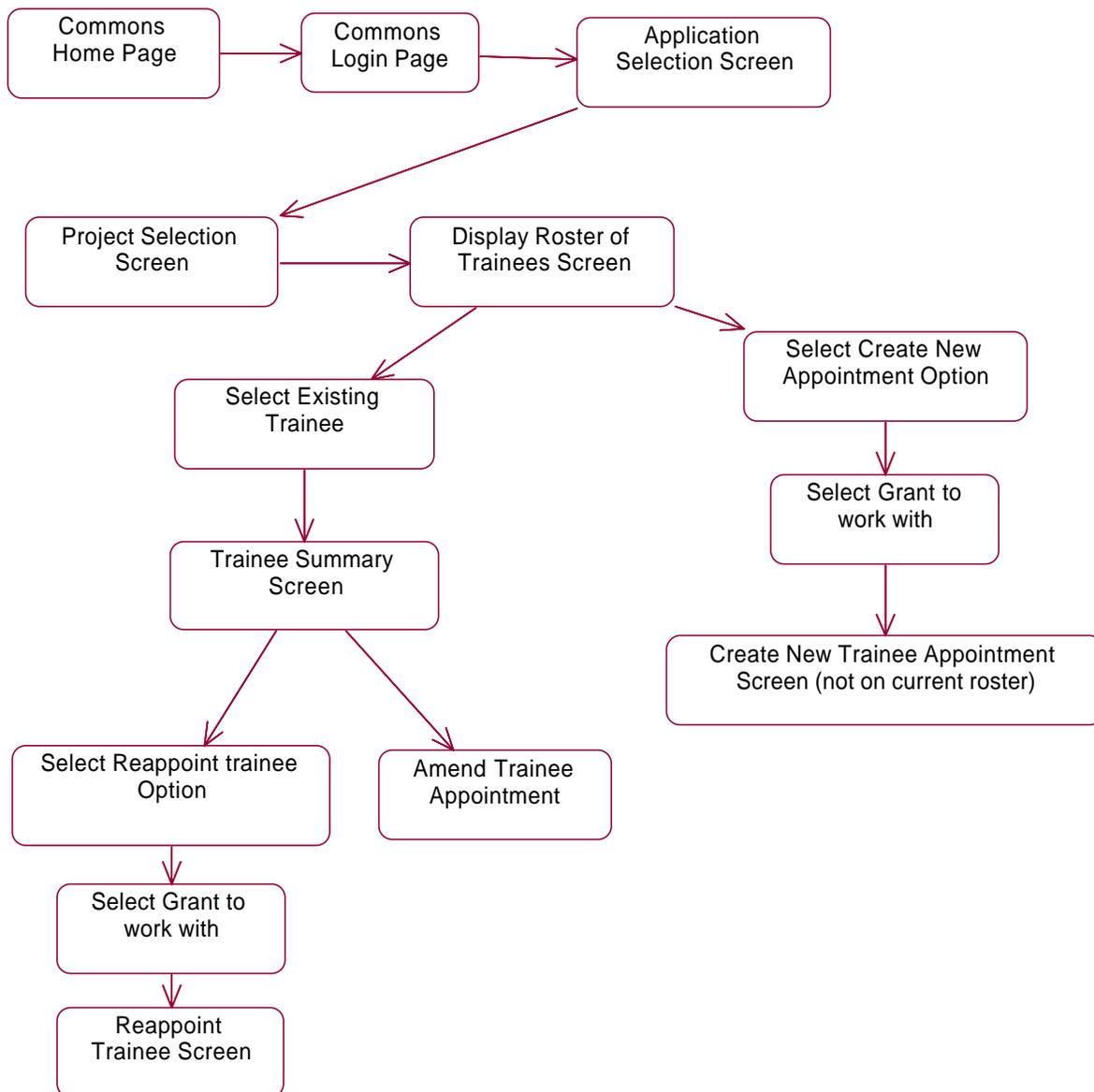
	Version: 1.3
Use Case Story Board – X-train	Date: 4/9/2003

Introduction:

This document contains screen prototypes for the Xtrain ver 2.0 application.

The purpose of the document is to show general look and feel of the application, and show screen navigation.

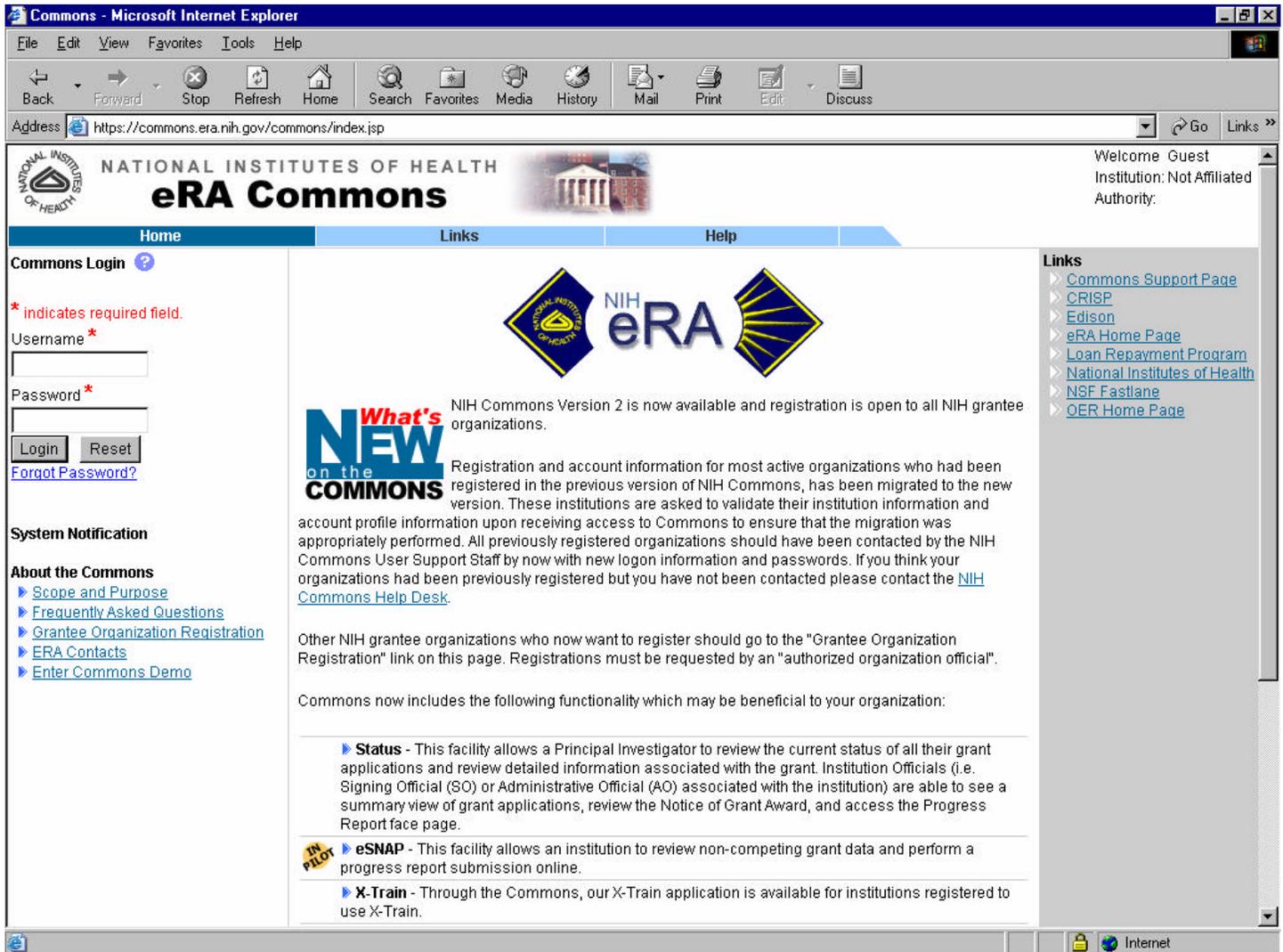
Xtrain 2.0 Navigation Summary



Use Case Story Board – X-train	Version: 1.3
	Date: 4/9/2003

X-train Screen Shots

1. ERA COMMONS Login Page



Screen Description: Common login screen where user session originates. Must access this screen and provide username and password before user can proceed to other screens.

User/System Interaction Matrix

User	System
Enters Username and password, hits login button	Returns error, or proceeds to the application selection screen.

Use Case Story Board – X-train	Version: 1.3
	Date: 4/9/2003

Application Selection Screen

System Notification

About the Commons

- ▶ [Scope and Purpose](#)
- ▶ [Frequently Asked Questions](#)
- ▶ [Grantee Organization Registration](#)
- ▶ [ERA Contacts](#)
- ▶ [Enter Commons Demo](#)

What's New on the COMMONS

NIH Commons Version 2 is now available and registration is open to all NIH grantee organizations.

Registration and account information for most active organizations who had been registered in the previous version of NIH Commons, has been migrated to the new version. These institutions are asked to validate their institution information and account profile information upon receiving access to Commons to ensure that the migration was appropriately performed. All previously registered organizations should have been contacted by the NIH Commons User Support Staff by now with new logon information and passwords. If you think your organizations had been previously registered but you have not been contacted please contact the [NIH Commons Help Desk](#).

Other NIH grantee organizations who now want to register should go to the "Grantee Organization Registration" link on this page. Registrations must be requested by an "authorized organization official".

Commons now includes the following functionality which may be beneficial to your organization:

- ▶ **Status** - This facility allows a Principal Investigator to review the current status of all their grant applications and review detailed information associated with the grant. Institution Officials (i.e. Signing Official (SO) or Administrative Official (AO) associated with the institution) are able to see a summary view of grant applications, review the Notice of Grant Award, and access the Progress Report face page.
- ▶ **eSNAP** - This facility allows an institution to review non-competing grant data and perform a progress report submission online.
- ▶ **X-Train** - Through the Commons, our X-Train application is available for institutions registered to

Links

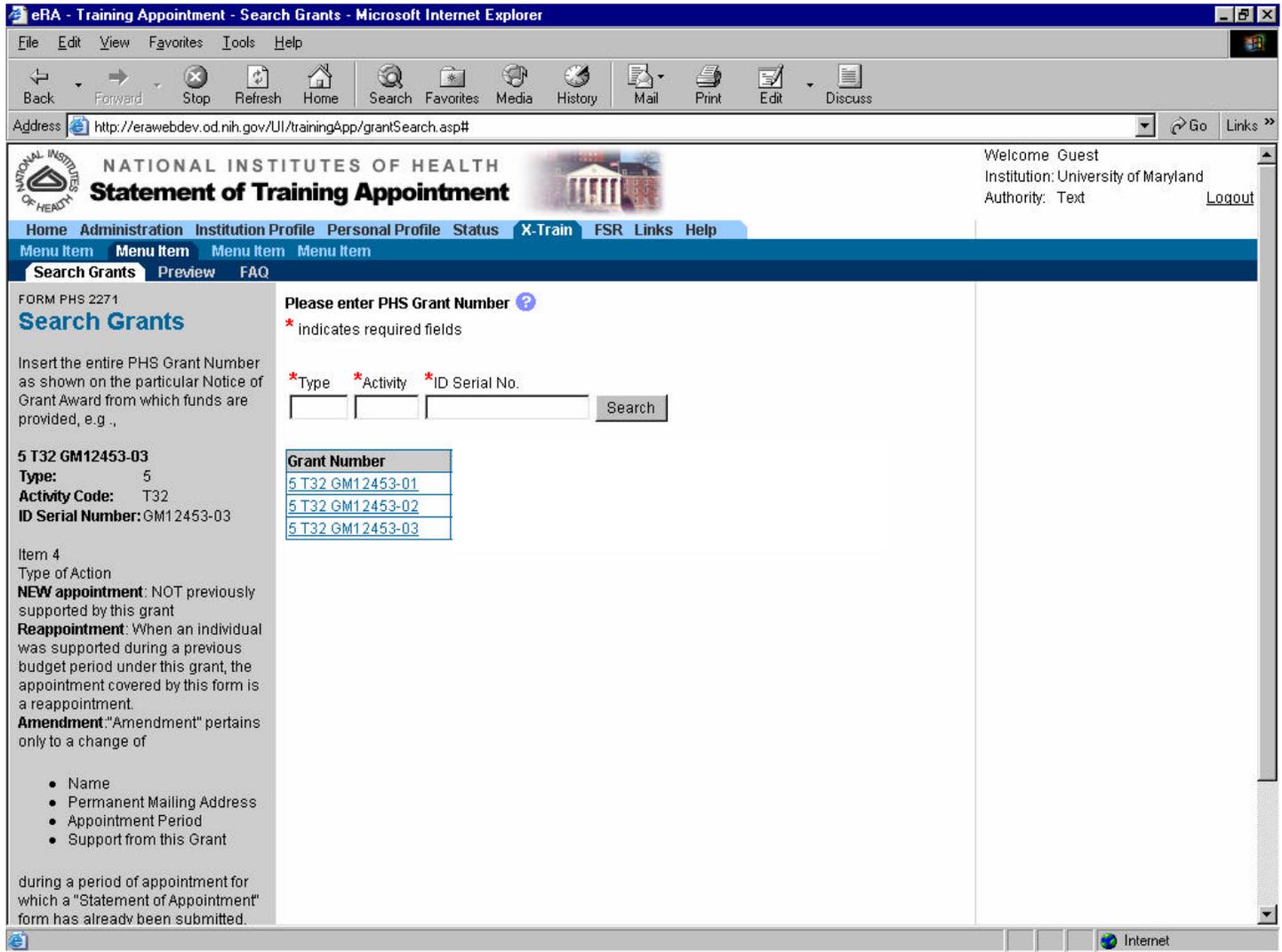
- ▶ [Commons Support Page](#)
- ▶ [CRISP](#)
- ▶ [Edison](#)
- ▶ [eRA Home Page](#)
- ▶ [Loan Repayment Program](#)
- ▶ [National Institutes of Health](#)
- ▶ [NSF Fastlane](#)
- ▶ [OER Home Page](#)

Screen Description: Allows you to select various applications that you have been given access to, including Xtrain.

Step	User	System
1	Selects application they want to work with (Xtrain)	
2		Navigates to home page of application (Xtrain)

Use Case Story Board – X-train	Version: 1.3
	Date: 4/9/2003

2. Grant Selection Screen



Screen Description: Common login screen where user session originates. Must login to this screen first to proceed to other screens.

User/System Interaction Matrix

Step	User	System
1		Displays all awarded training grants that user is currently the Program Director for.
2	User selects the grant they wish to work on from the displayed list of grants. The grant list should be a hyperlink that displays the roster for the selected grant when selected.	

	Version: 1.3
Use Case Story Board – X-train	Date: 4/9/2003

Trainee Roster Screen

NIH Training Grant Number: T32 GM8334
Program Director: WITTRUP, KARL D.

Trainee Name	Appointment		
	Start Date	End Date	Status
Lastname1, Firstname1 M	09/01/1988	09/01/1999	Expired
Lastname2, Firstname2 M	09/01/1988	09/01/1999	Expired
Lastname3, Firstname3 M	09/01/1988	09/01/1999	Expired
Lastname4, Firstname4 M	09/01/1988	09/01/1999	-
Lastname5, Firstname5 M	09/01/1988	09/01/1999	Terminated
Lastname6, Firstname6 M	09/01/1988	09/01/1999	Expired
Lastname7, Firstname7 M	09/01/1988	09/01/1999	Expired
Lastname8, Firstname8 M	09/01/1988	09/01/1999	Expired

Create New Trainee Appointment

Add Support Year Column

Screen Description: Roster screen that displays all trainees who have been or currently are assigned to the training grant. This would be all trainees assigned to the grant project, which is activity code, IC codes, and serial number.

User/System Interaction Matrix

Step	User	System
1		Displays all users who have participated on the grant project.
2	User selects the trainee they wish to work on from the displayed list of trainees. The trainee list should be a hyperlink that displays the trainee appointment summary info when selected.	

Use Case Story Board – X-train	Version: 1.3
	Date: 4/9/2003

Create New Trainee Appointment Entry Screen

Screen Description: This screen will allow for entry of Trainee data such as name, and address information.

User/System Interaction Matrix

Step	User	System
1		Displays data for trainee selected from roster screen.
2	Enters new trainee information	
3		System Navigates to selected button

Use Case Story Board – X-train	Version: 1.3
	Date: 4/9/2003

Create New Trainee Appointment Entry Screen(2)

FORM PHS 2271

New Appointment

Item 2
Name
Include maiden name or other names in parentheses where applicable.

Item 6
Social Security Number
See [Privacy Act](#) Statement concerning this request.

Type of Action >> Trainee >> Ethnicity >> Address >> Education >> Prior Support >> More ...

Trainee Name: Ameer, Guillermo A. NIH Training Grant Number: T32 GM9334 - 1 0

* indicates required fields

Trainee Education

	*Degree Code	Year of Degree (mm/dd/yyyy)	Institution
Highest Degree	Select Degree Code		
Seeking Degree	Select Degree Code		

Appointment Data

FOT Code (Field of Training):

*Start Date (mm/dd/yyyy) *End Date (mm/dd/yyyy) Month(s)

*Stipend Level	Stipend	Tuition/Fees	Travel	TOTAL
Select Stipend Level	\$	\$	\$	\$

Save and Submit to NIH Cancel Appointment

[Contact Us | Privacy Act Statement | Disclaimer | Accessibility]

National Institutes of Health (NIH)
9000 Rockville Pike
Bethesda, Maryland 20892

Department of Health and Human Services
Public Health Services

© 2003 NIH. All Rights Reserved.
Screen Rendered: 08/27/2002 02:50:54 EDT
Screen ID: COM0001

Screen Description: This screen will allow for entry of Trainee data such as name, and address information.

User/System Interaction Matrix

Step	User	System
1		Displays data for trainee selected from roster screen.
2	Enters new trainee information	
3		System Navigates to selected button

	Version: 1.3
Use Case Story Board – X-train	Date: 4/9/2003

Race/Ethnicity Screen

Screen Description: Shows Race/Ethnicity Data

User/System Interaction Matrix

Step	User	System
1		Displays Radio buttons/check boxes
2	User selects appropriate values	

	Version: 1.3
Use Case Story Board – X-train	Date: 4/9/2003

Trainee Address Screen

Address: http://erawebdev.od.nih.gov/UI/trainingApp/address.asp

NATIONAL INSTITUTES OF HEALTH
Statement of Training Appointment

Welcome Guest
Institution: University of Maryland
Authority: Text [Logout](#)

Home Administration Institution Profile Personal Profile Status **X-Train** FSR Links Help

Menu Item Menu Item Menu Item Menu Item

Search Grants Preview FAQ

FORM PHS 2271
Mailing Address
Item 9
Permanent Mailing Address
Give an address where the appointed individual can be reached by mail after completion of the program. (Do not give present address unless it is considered permanent as defined above.)

Type of Action >> [Trainee](#) >> [Ethnicity](#) >> [Address](#) >> [Education](#) >> [Prior Support](#) >> [More ...](#)

Trainee Name: Ameer, Guillermo A. **NIH Training Grant Number:** T32 GM8334 - 10

Trainee's Permanent Mailing Address ?

Street, Building, Suite No., etc

City State

Country

Trainee's Email:

[[Contact Us](#) | [Privacy Act Statement](#) | [Disclaimer](#) | [Accessibility](#)]

National Institutes of Health (NIH)
9000 Rockville Pike
Bethesda, Maryland 20892

Department of Health and Human Services
Public Health Services

© 2003 NIH. All Rights Reserved.
Screen Rendered: 09/27/2002 02:50:51 EDT
Screen Id: COM0001

Done Internet

Screen Description: Provides place to enter trainee address information.

User/System Interaction Matrix

Step	User	System
1		Provides screen elements to capture address information.
2	User selects one of several buttons located at bottom of screen.	

Use Case Story Board – X-train	Version: 1.3
	Date: 4/9/2003

Trainee Education Screen

Screen Description: Provides for entry of Trainee Education Information.

User/System Interaction Matrix

Step	User	System
1		Provides for entry of Education information
2	Enters trainee education data.	

	Version: 1.3
Use Case Story Board – X-train	Date: 4/9/2003

Field of Training Screen

Screen Description: Provides for entry of field of training information for trainee.

User/System Interaction Matrix

Step	User	System
1		Displays form for entering of FOT information
2	Enters FOT data	

	Version: 1.3
Use Case Story Board – X-train	Date: 4/9/2003

Specialty Boards/Degrees Sought

The screenshot shows a web browser window titled "eRA - Training Appointment - Specialty Boards & Degrees - Microsoft Internet Explorer". The address bar shows the URL: http://erawebdev.od.nih.gov/UI/trainingApp/specialtyBoards.asp. The page header includes the National Institutes of Health logo and the text "Statement of Training Appointment". A navigation menu includes "Home", "Administration", "Institution Profile", "Personal Profile", "Status", "X-Train", "FSR", "Links", and "Help". The main content area is titled "Specialty Boards & Degrees" and contains the following form fields:

- Form PHS 2271**
- Specialty Boards & Degrees**
- Item 15: **Specialty Boards**. If not applicable, indicate N/A.
- Item 16-17: **Degree(s)**. Provide the degree sought under the Ruth L. Kirschstein NRSA. Indicate whether you are in a double degree program (e.g., M.D./Ph.D.). Include the date that all degree requirements will be completed.
- Type of Action**: Trainee >> Ethnicity >> Address >> Education >> Prior Support >> More ...
- Trainee Name**: Ameer, Guillermo A. **NIH Training Grant Number**: T32 GM8334 - 10
- Names of Specialty Boards**: [Text input field]
- N/A
- Degree(s) Sought**: [Select Degree(s) dropdown]
- Are you in a double degree program (e.g., M.D./Ph.D.)? YES NO
- Completion Date**: [Month] [Day] [Year] input fields
-

Footer information includes: [Contact Us | Privacy Act Statement | Disclaimer | Accessibility], National Institutes of Health (NIH) logo, Department of Health and Human Services logo, and copyright notice: © 2003 NIH. All Rights Reserved. Screen Rendered: 09/27/2002 02:50:51 EDT. Screen Id: COM0001.

Screen Description: Provides for entry of Specialty Boards and degree information.

User/System Interaction Matrix

Step	User	System
1		Displays fields for entry
2	Enters trainee data	

	Version: 1.3
Use Case Story Board – X-train	Date: 4/9/2003

Period of Appointment Screen

Screen Description: Screen used to enter period of appointment data. This will likely be combined with other appointment data, including stipend amounts.

User/System Interaction Matrix

Step	User	System
1		Displays fields for entry
2	Enters trainee data	

Use Case Story Board – X-train	Version: 1.3
	Date: 4/9/2003

Support/Stipend Screen

Screen Description: Provides for entry of stipend and other financial support data.

User/System Interaction Matrix

Step	User	System
1		Provides fields for entry
2	Enters trainee data	

Use Case Story Board – X-train	Version: 1.3
	Date: 4/9/2003

Federal Debt Indicator Screen

eRA - Training Appointment - Statement of Nondelinquency on Federal Debt - Microsoft Internet Explorer
 Address: http://erawebdev.od.nih.gov/UI/trainingApp/NonDelinquency.asp
 NATIONAL INSTITUTES OF HEALTH
Statement of Training Appointment
 Welcome Guest
 Institution: University of Maryland
 Authority: Text [Logout](#)
 Home Administration Institution Profile Personal Profile Status **X-Train** FSR Links Help
 Menu Item Menu Item Menu Item Menu Item
 Search Grants Preview FAQ
 FORM PHS 2271
Statement of Nondelinquency on Federal Debt
 Item 19
 A "Statement of Nondelinquency on Federal Debt" is required for each particular appointment period and is to be completed by each individual (trainee) appointed to receive financial support under a Public Health Service (PHS) institutional training grant. [More...](#)
 Type of Action >> [Trainee](#) >> [Ethnicity](#) >> [Address](#) >> [Education](#) >> [Prior Support](#) >> [More...](#)
 Trainee Name: Ameer, Guillermo A. NIH Training Grant Number: T32 GM8334 - 10
Statement of Nondelinquency on Federal Debt ?
 Is the trainee delinquent on the repayment of any Federal debt(s)?
 NO
 YES (If "Yes," please explain below.)

 Finished

[Contact Us | Privacy Act Statement | Disclaimer | Accessibility]
 National Institutes of Health (NIH)
 9000 Rockville Pike
 Bethesda, Maryland 20892
 Department of Health and Human Services
 Public Health Services
 © 2003 NIH. All Rights Reserved.
 Screen Rendered: 09/27/2002 02:50:51 EDT
 Screen Id: COM0001

Screen Description: Provides for entry of federal debt status.

User/System Interaction Matrix

Step	User	System
1		Provides fields for entry of data
2	Enters trainee data.	

Trainee Appointment Summary Screen

Appointment Statement
Help text, if any.

Type of Action >> [Trainee](#) >> [Ethnicity](#) >> [Address](#) >> [Education](#) >> [Prior Support](#) >> More ...

Trainee Name: Ameer, Guillermo A. NIH Training Grant Number: T32 GM8334 - 10

Education			
Start Date	Degree Code	Year of Degree (mm/dd/yyyy)	Institution
Highest Degree	BS	09/01/1999	Univ. of Texas
Seeking Degree	PHD		Univ. of Texas

Appointment Data				
FOT Code (Field of Training): POT text text text				
Start Date: 09/01/1998	End Date: 12/14/1998	Month(s): 3.5		
Stipend Level: Pre - 11,748	Stipend: \$3321	Tuition/Fees: \$0	Travel: \$0	Total: \$3321

Appointment History									
Year	FY	Start	End	Month(s)	Stipend Level	Amount	Tuition	Travel	Total
10	1998	09/01/1998	12/14/1998	3.5	Pre - 11,748	3321	0	0	3321
Totals		09/01/1998	12/14/1998	3.5		3321	0	0	3321

Amendment Reappointment Back to Roster

[Contact Us | Privacy Act Statement | Disclaimer | Accessibility]

National Institutes of Health (NIH)
9000 Rockville Pike
Bethesda, Maryland 20892

Department of Health and Human Services
Public Health Services

© 2003 NIH. All Rights Reserved.
Screen Rendered: 09/27/2002 02:50:51 EDT
Screen Id: COM0001

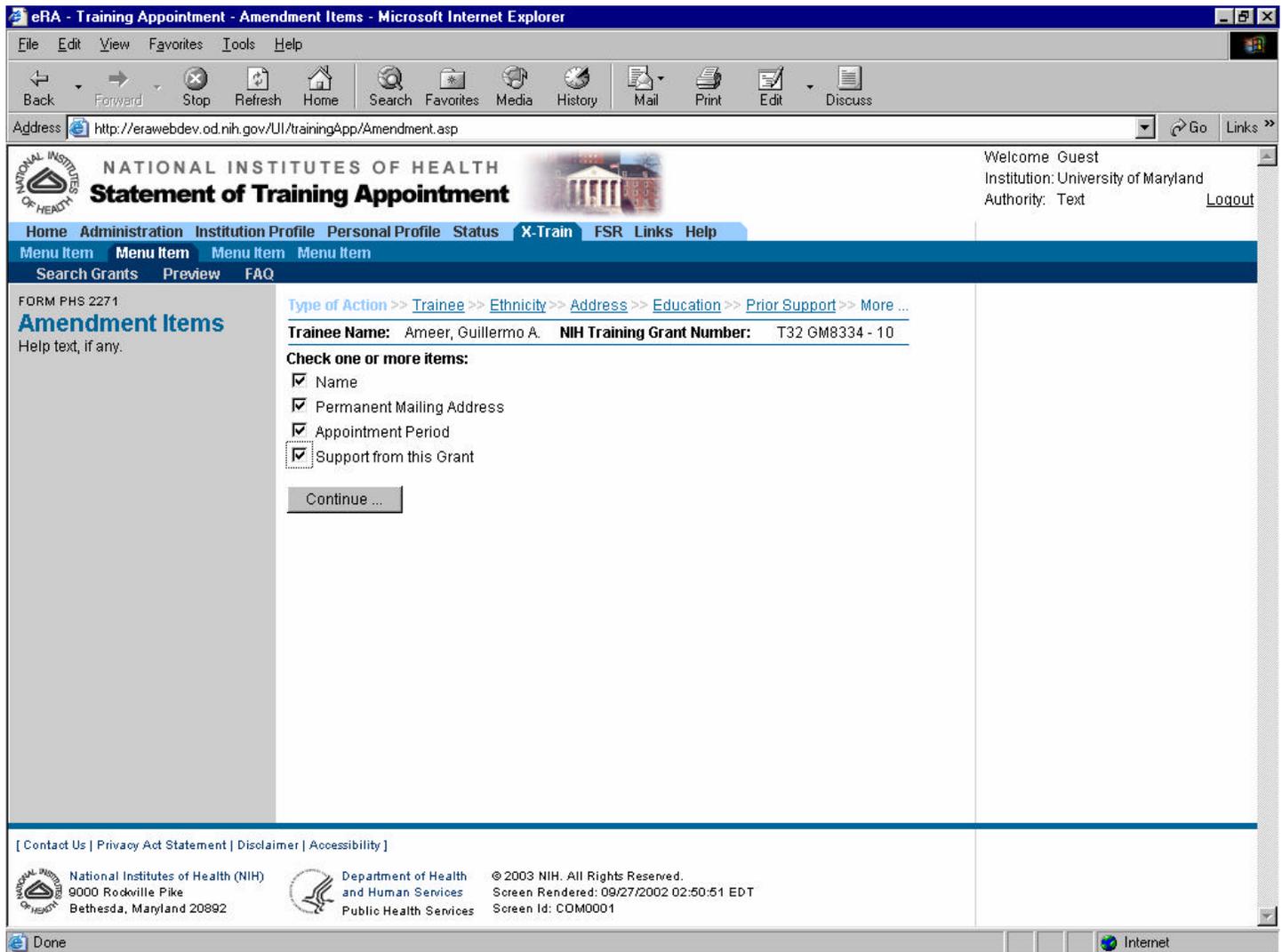
Screen Description: Shows appointment summary data for the most recent support year that the trainee was on the grant. Ex. If the PD wants to reappoint someone for year 12, this screen would show year 11 info if the trainee was assigned to the grant in year 11.

User/System Interaction Matrix

Step	User	System
1		Displays data for trainee selected from roster screen.
2	User selects one of several buttons located at bottom of screen.	
3		System Navigates to selected button

	Version: 1.3
Use Case Story Board – X-train	Date: 4/9/2003

Amendment Selection Screen



Screen Description: Shows appointment summary data for the most recent support year that the trainee was on the grant. Ex. If the PD wants to reappoint someone for year 12, this screen would show year 11 info if the trainee was assigned to the grant in year 11.

User/System Interaction Matrix

Step	User	System
1		Displays data for trainee selected from roster screen.
2	User selects one of several buttons located at bottom of screen.	

	Version: 1.3
Use Case Story Board – X-train	Date: 4/9/2003

General Screen Requirements

In addition to the specific design information for each screen, the following are general requirements for all XTrain screens:

XTRAIN-01-0010: XTrain must be linked and accessible from the main Commons Web page.

XTRAIN-01-0020: XTrain must only be accessible through authority of the Commons security login where the user must enter a valid institution, account, password, and grant project number.

XTRAIN-01-0030: Presentation of all XTRAIN screens and interactions with Commons servers must be guarded and under control of Commons security.

XTRAIN-01-0040: All XTRAIN application screens must comply with the Commons user interface standards.