ERA National Institutes of Health

Xtrain
Use Case Specification: Display Roster of Trainees
Version 1.4

Revision History

Date	Version	Description	Author
June 04, 2001	Draft	draft	R. Reifsnider
June 22, 2001	Draft	Incorporates references to Screen Specifications	R. Reifsnider
February 20, 2003	1. 0	Clarified text, added diagram, changed formatting.	Steve Fitzgerald
March 12, 2003	1.1	Modified textual flow, added business rules	Steve Fitzgerald
March 28, 2003	1.2	Clarified basic flow to include a distinct list of trainees, and if a trainee is on multiple support years, show only the most recent appointment.	Steve Fitzgerald
April 2, 2003	1.3	Added filter requirement for large pick lists	Steve Fitzgerald
April 10, 2003	1.4	Modified Flow Chart, confirm the exclusion of terminated trainees from list. Change list show that it shows by default only the current and previous support year, but keeps filter ability to provide for larger list.	Steve Fitzgerald

Contents

Use Case Specification: Display Roster of Trainees

1. Brief Description

This use case describes how the actor uses the Training roster list to select an individual to work with or to create a new trainee appointment.
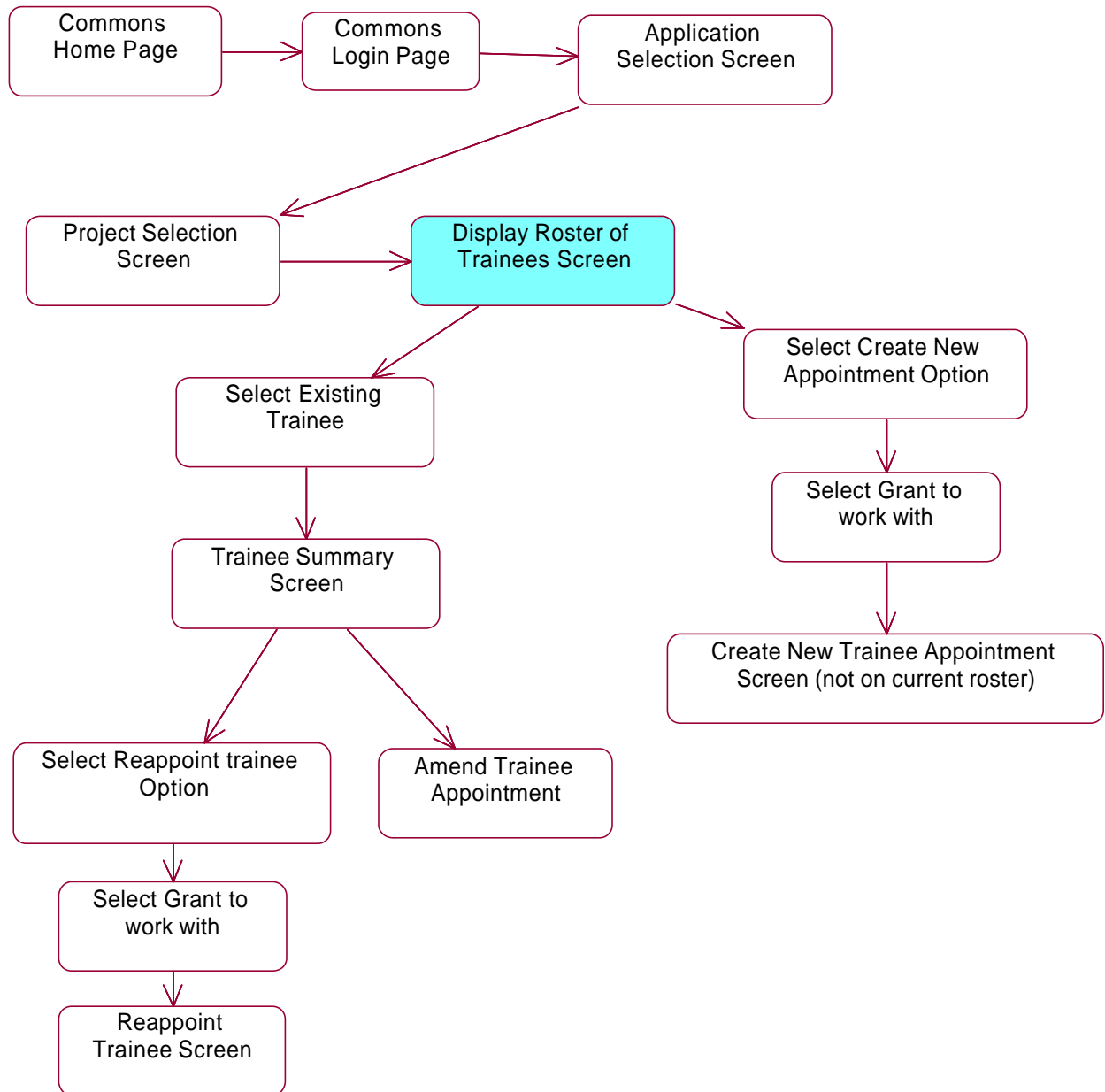
2. Pre-Conditions

1. User has logged in to Commons

2. User has chosen Xtrain application to work with

3. User has chosen a specific support year to work with.

3. Flow of Events

3.1 Navigation Chart

```
Commons          →    Commons          →    Application
Home Page             Login Page            Selection Screen
                                                   ↓
Project Selection  →  Display Roster of
Screen                Trainees Screen
                         ↓          ↘
                                      Select Create New
                                      Appointment Option
                                             ↓
                    Select Existing     Select Grant to
                    Trainee             work with
                         ↓                   ↓
                    Trainee Summary     Create New Trainee Appointment
                    Screen              Screen (not on current roster)
                      ↓        ↘
        Select Reappoint trainee   Amend Trainee
        Option                     Appointment
             ↓
        Select Grant to
        work with
             ↓
        Reappoint
        Trainee Screen
```

3.2 Basic Flow

1) The system displays the Roster of Trainees, along with their appointment status. The default roster list should include a distinct list of trainees who are currently appointed to the project. See filter requirements in 'other requirements' section of this document.

The list should exclude trainees who have been terminated.

Verify with Advocate

If a trainee is appointed to the grant for more than one support year, only show the most recent appointment on the roster list.

2) The roster list should include the following information for each trainee, and display it as a list/table, with one trainee per line.

Last Name, First Name, Middle Initial, appointment start date, appointment end date, current status of appointment, fiscal year, and support year of appointment.

The sort order of the roster list should be:

support year descending (most recent first), Last Name, First name

See the Xtrain Use Case Storyboard for an example screen.

3) The user selects a trainee from the highlighted list

4) The appointment summary screen is displayed

3.3 Alternative Flows

3) user selects the create new trainee appointment button.

4. Post-Conditions

1. The Roster of Trainees is displayed

5. Special Requirements

5.1 Data validation

See Suppleme ntary Specification for additional business rules.

1) Valid Status of appointment values
    a. Expired (previously assigned to the grant on an earlier project period.)
    b. Submitted (submitted to NIH but not yet accepted by NIH staff)
    c. Accepted (Currently assigned to this support year of the training grant.)

5.2 Algorithms

None.

5.3 Other Requirements

5.3.1 Filter Ability

The system should provide a way to filter the roster list to limit how many prior support periods are displayed on the roster. Some grants may have several hundred trainees, and the user needs to have a way to narrow the roster list, if they desire to do so.

The **default** roster list should include a distinct list of trainees appointed to the current and one year previous support year. (only showing the most recent appointment if trainee has several appointments).

Near the top of the roster list there should be a way for the user to filter the roster list based on the following:

1) Show distinct list of trainees appointed to this project for the last 5 years. (current and previous 4 years)
2) Show distinct list all trainees.
    If a trainee has more than one year of support on the project, display on the most resent appointement.