



## LEARNING MANAGEMENT SYSTEM (LMS) APPROVING ORDERS – ADDITIONAL APPROVER FOR ORDERS (AAO)

This QRG will guide Additional Approvers for Orders through the task of adding a CAN Note to an Order and approving an Order for a Learner.

1. Log into the LMS.
2. Select the **Admin** icon.



Figure 1 – Admin icon

3. Select the **Registrar** tab.

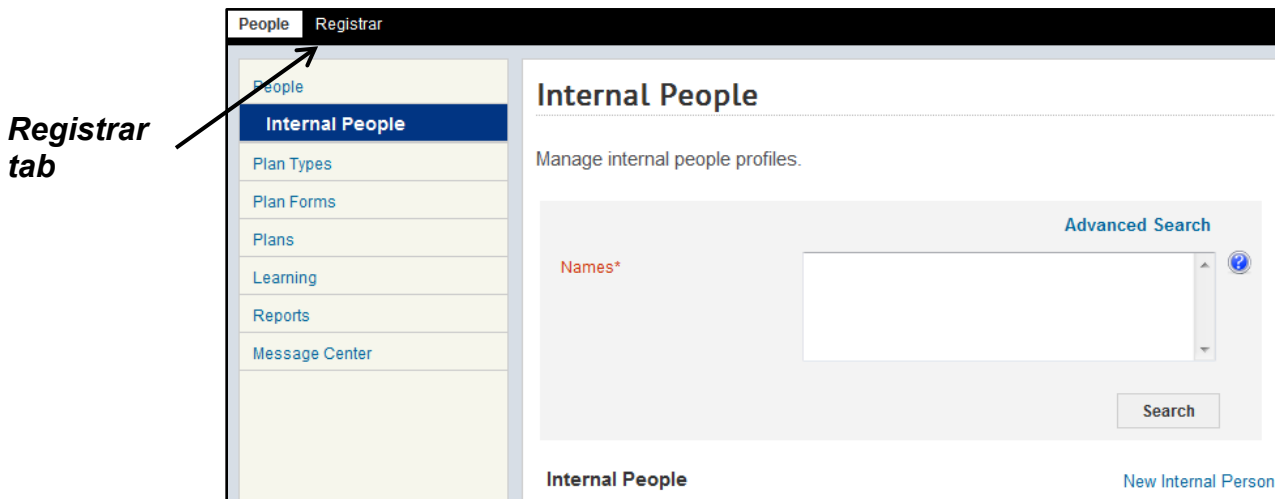


Figure 2 – Registrar tab

4. Select the **Order History** link in the left navigation menu.

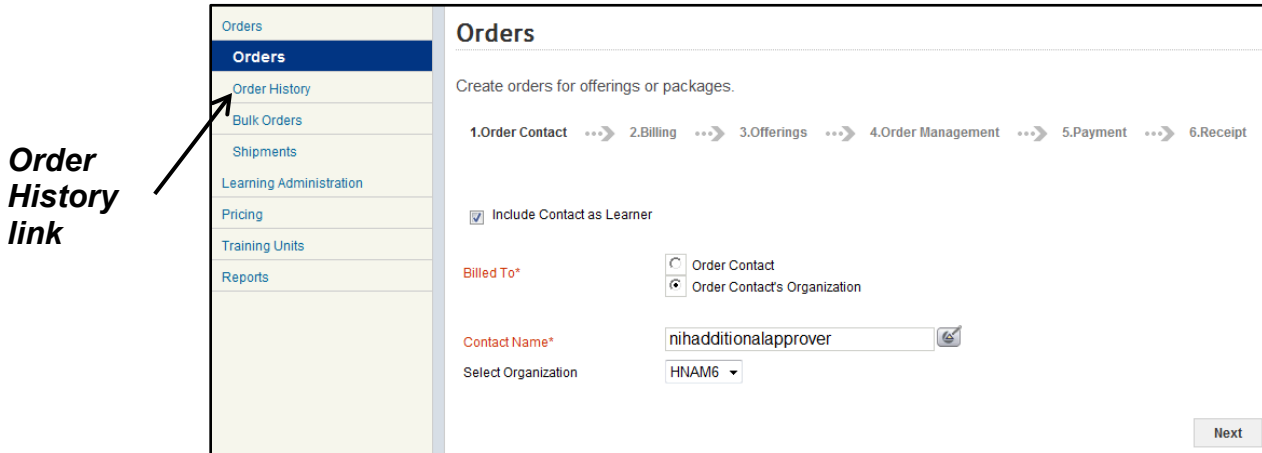


Figure 3 – Order History link

5. Enter the number of the Order to be modified in the Order Number field and select the **Search** button.

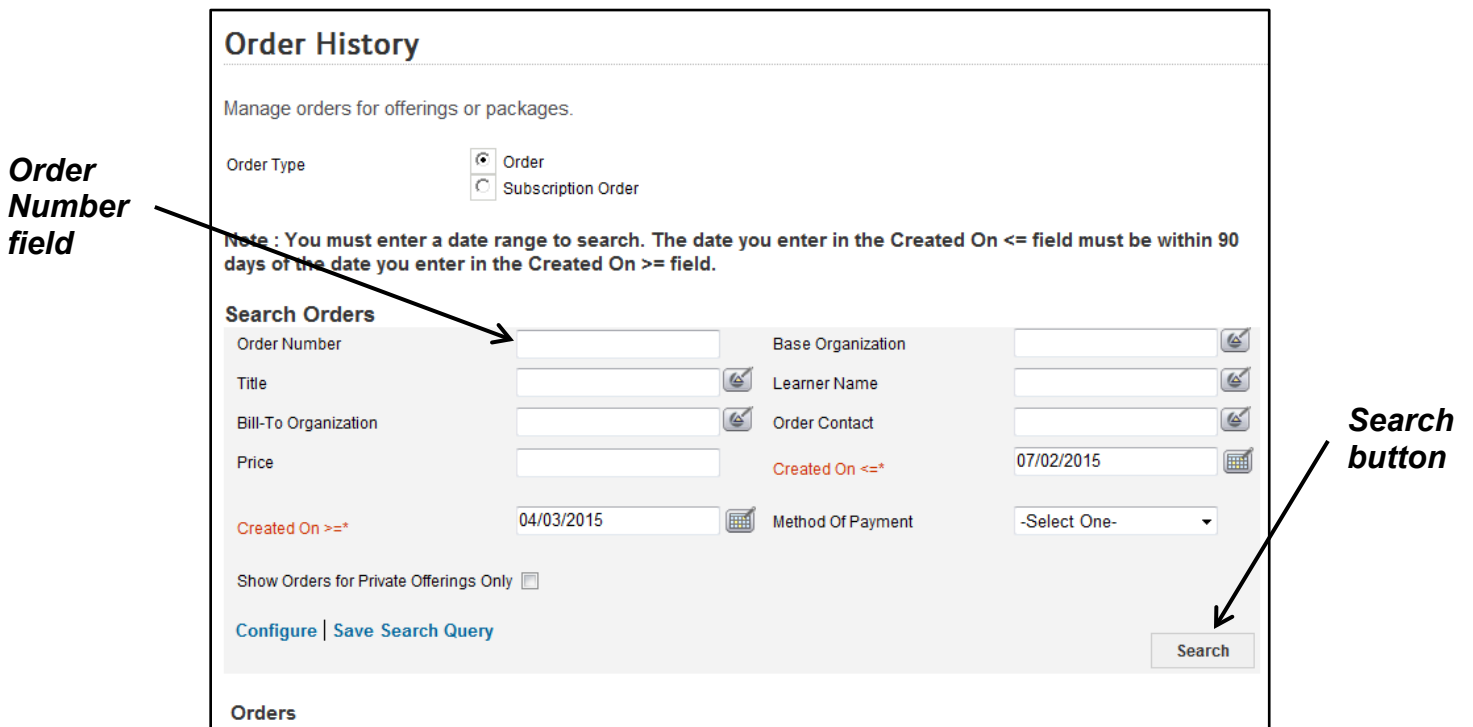


Figure 4 – Order Number field and Search button

6. From the Orders search results, select the **Order Number** link.

**Order  
Number  
link**

**Order History**

Manage orders for offerings or packages.

Order Type  Order  Subscription Order

Note : You must enter a date range to search. The date you enter in the Created On <= field must be within 90 days of the date you enter in the Created On >= field.

**Search Orders**

Order Number  Base Organization

Title  Learner Name

Bill-To Organization  Order Contact

Price  Created On <=\*

Created On >=\*  Method Of Payment

Show Orders for Private Offerings Only

[Configure](#) | [Save Search Query](#)

**Orders** [Print](#) | [Export](#) | [Modify Table](#)

Showing 1 out of 1 results

<a href="#">Order Number</a>	<a href="#">Order Contact</a>	<a href="#">Bill-To Organization</a>	<a href="#">Price</a>	<a href="#">Status</a>	<a href="#">Title</a>	<a href="#">Learner Name</a>	<a href="#">Offering Type</a>	<a href="#">Created On</a>	<a href="#">Version</a>	<a href="#">Mandatory</a>
<a href="#">02492060</a>	NIH Manager	HNAM6	683.00 USD	Confirmed	NIH LMS People Administrator		Public	06/29/2015	FY15	<input type="checkbox"/>

Figure 5 – Order Number link

7. Select the **Notes** link.

**Order Details: Order Number 04140268**

Order Contact  
Created On 03/13/2017  
Order Status [Confirmed](#)  
Billed To HNAM4A2

**Order Notes** [Add CAN](#)

No items found

**Order Items**

Title	Learner	Delivery Type	Status	Actions	Price	Cancellation Reason
NIH LMS People Administrator		Instructor led	Confirmed	<a href="#">Change Learner</a> <a href="#">Reschedule</a> <a href="#">Add CAN</a> <a href="#">Drop</a>	225.00 USD	
<b>Total</b>						225.00 USD

[Cancel](#)

**Add  
CAN  
link**

Figure 6 – Add CAN link

**IMPORTANT!** Do not use the **Change Learner** link to replace a person on an Order. If a person needs to be substituted for another on a roster, please contact the NIH Training Center at 301-496-6211 or [training1@od.nih.gov](mailto:training1@od.nih.gov).

8. Select the **Add Note** link.

**Add/View Notes**

Notes

View By Category

**Generally used to capture short comments and suggestions about learning content and training courses.**

[Add Note](#)

No items found

[Close](#)

**Add  
Note  
link**

Figure 7 – Add Note link

9. Select **CAN** from the Category pull-down menu.

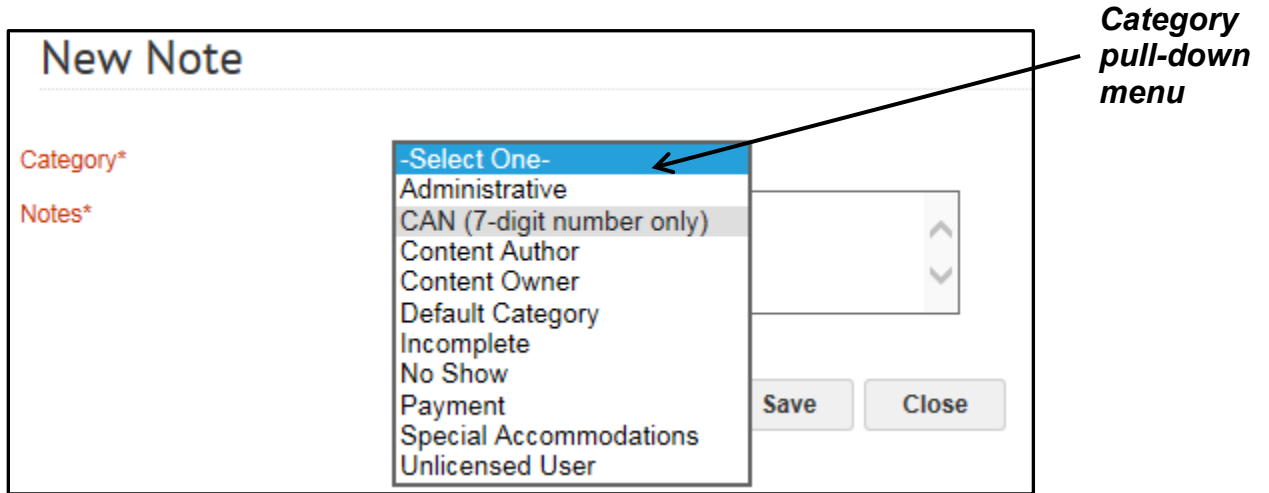


Figure 8 – CAN option on the Category pull-down menu

10. In the **Notes** field, enter a new/corrected CAN to be used for the Order. Select the **Save** button to save the Note.

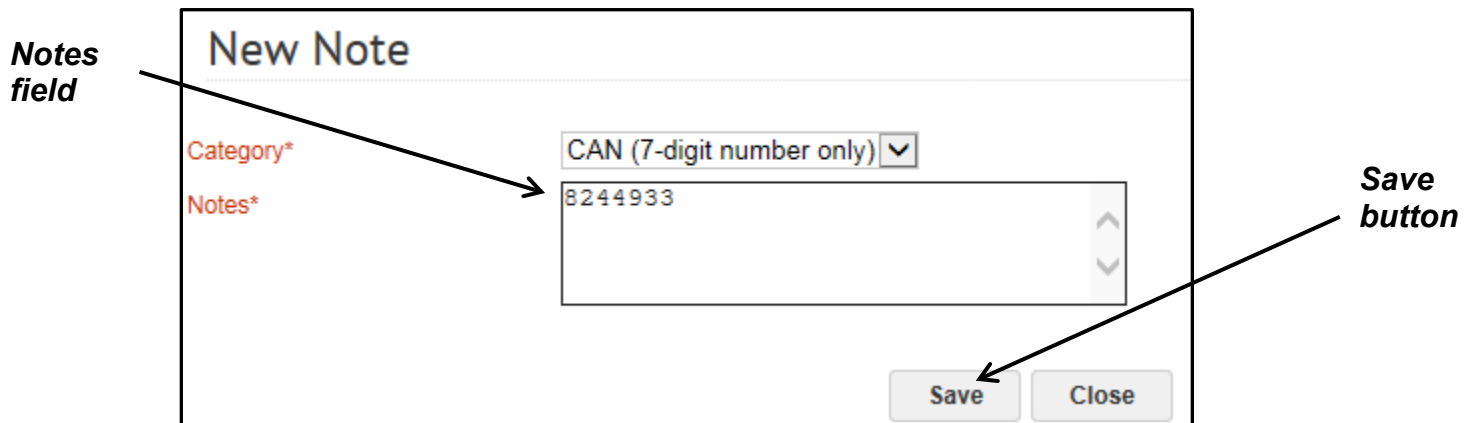


Figure 9 – Notes field

**Note:** The CAN field only accepts the 7-digit CAN. Fiscal year information is not necessary and will generate an error.

11. The CAN Note should now be shown. Select the **Close** button to return to the Order.

The screenshot shows the 'Add/View Notes' interface. At the top, there is a 'Notes' section with a 'View By Category' dropdown menu set to 'ALL'. Below this, a descriptive text states: 'Generally used to capture short comments and suggestions about learning content and training courses.' To the right of this text are links for 'Add Note' and 'Modify Table'. Below the text, it says 'Showing 1 out of 1 results'. A table with four columns is displayed: 'Created On', 'Created By', 'Category', and 'Note'. The table contains one row of data: '07/02/2015', 'NIH Manager', 'CAN (7-digit number only)', and '8244933'. At the bottom right of the table area is a 'Close' button. An arrow points from the text 'Close button' to this button.

Created On	Created By	Category	Note
07/02/2015	NIH Manager	CAN (7-digit number only)	8244933

Figure 10 – Add/View Notes page with added CAN

12. Select the Inbox icon.

The screenshot shows the header of the 'HHS Learning Portal'. On the left is the HHS logo with the tagline 'The Joy of Learning Enabled Through Access!'. In the center are icons for user profile and settings. On the right, there is an inbox icon with a red notification badge containing the number '13'. To the right of the inbox icon is the user name 'NIH AdditionalApprover'. An arrow points from the text 'Inbox icon' to the inbox icon.

Figure 11 – Inbox icon

13. Select the **Approve Registrations** link in the left navigation menu.

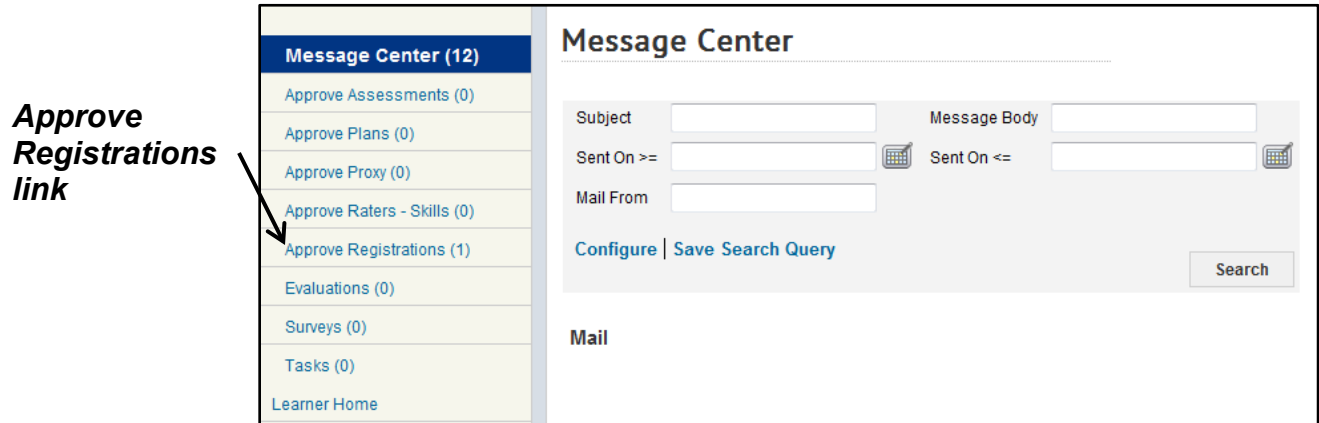


Figure 12 – Approve Registrations

14. In the Registrations Pending Approval by Order Item section, locate the Order you wish to approve. You can use the **Approve** or **Reject** links in the Action column to either approve or reject the Order, or you can select the checkbox for the Order and use the **Approve Selected** or **Reject Selected** buttons.

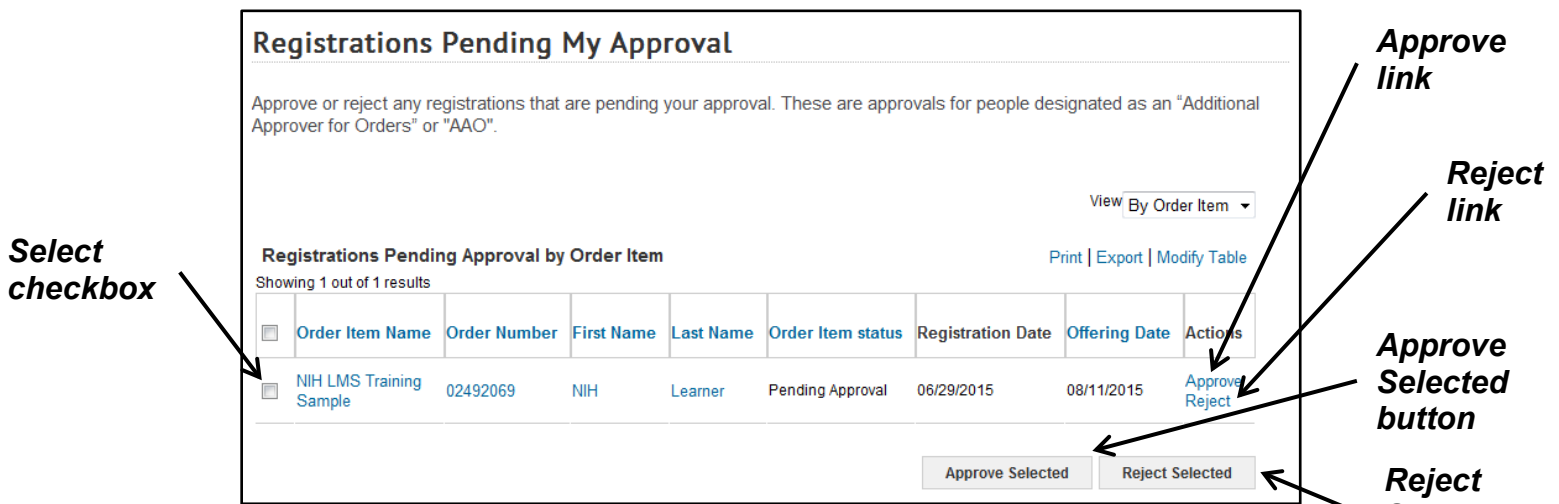


Figure 13 – Select checkbox, Approve Link, Approve Selected and Reject selected buttons

15. The Order is now approved and is no longer visible in your approval queue.

If you experience trouble with this process, please refer to the [LMS Support Page](#).