



LEARNING MANAGEMENT SYSTEM (LMS) **RUNNING THE NIH REGISTRATIONS NEEDING APPROVAL REPORT**

This QRG will guide approvers through the task of running the NIH Registrations Needing Approval report. This report allows you to easily view key information, such as the CAN, for any orders pending your approval. All registrations pending approval are listed in this report, regardless of whether or not your approval point has been reached in the approval chain.

The report also allows you to view another approver's pending approvals, so you can take action on behalf of someone who would normally be unable to make the approval themselves.

When one of your team members is added to an order needing approval, you will receive an email notification from the LMS stating that there is a registration pending your approval.

1. Log on to the LMS.
2. Select the **My Team** icon.



Figure 1 – My Team icon

3. Select the **Reports** link on the bottom left of the page.

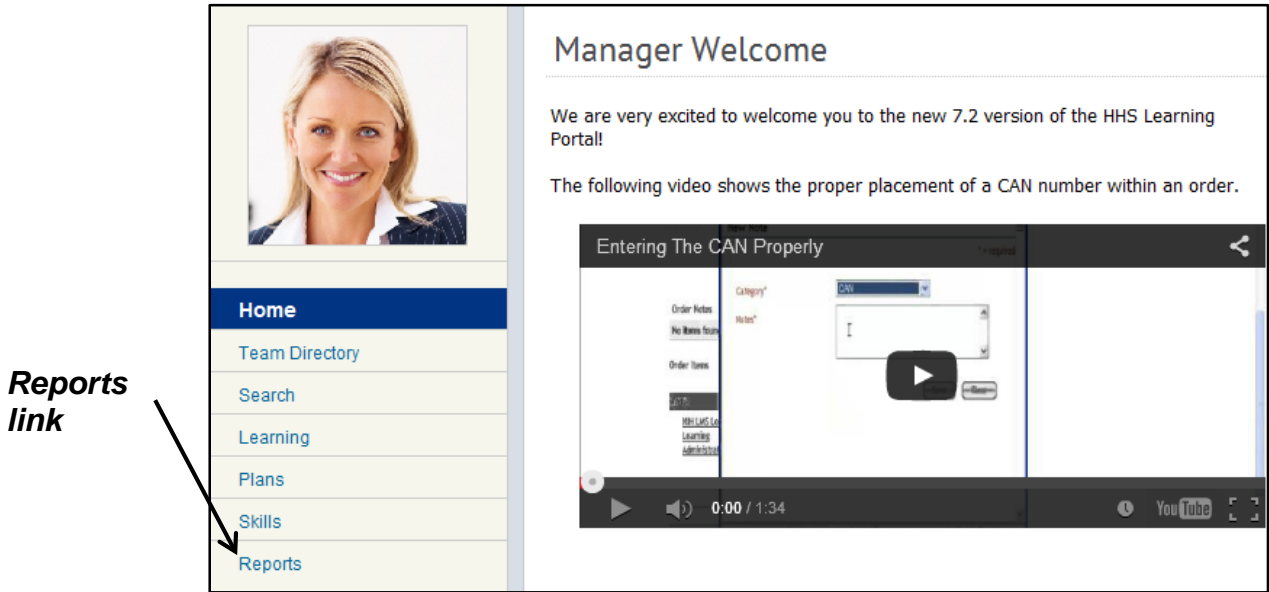


Figure 2 – Reports link

4. Enter NIH Registrations in the Name field and select the **Search** button.

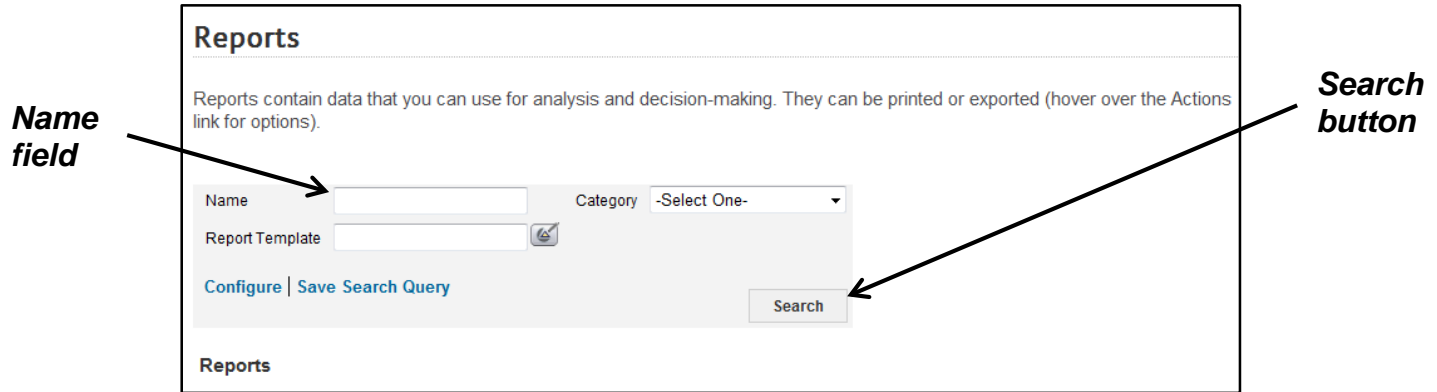


Figure 3 – Name field and Search button

- In the Reports table, select the **Actions** link for the NIH Registrations Needing Approval report.

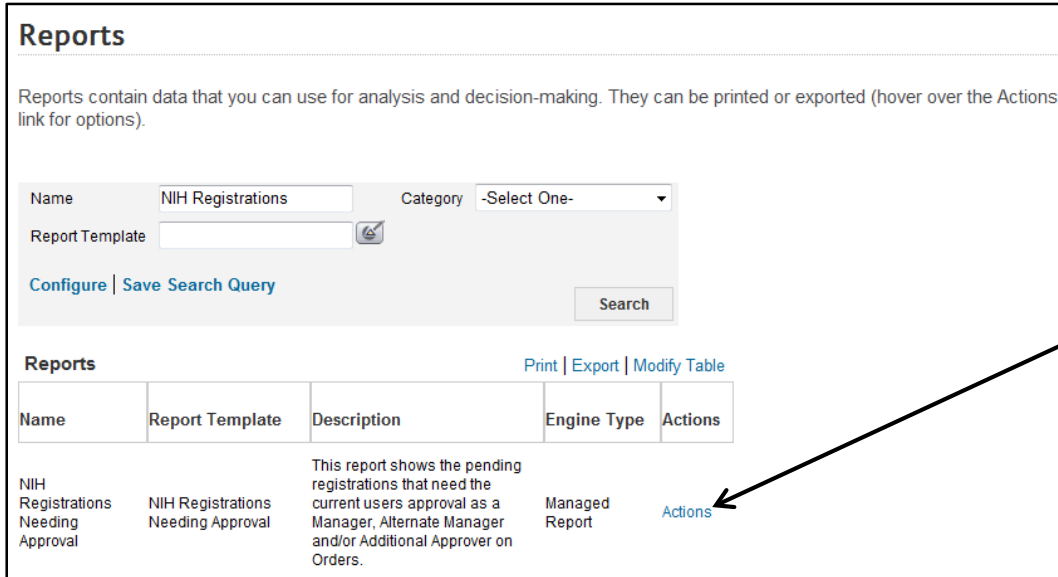


Figure 4 – Actions link

- Select the **Execute** from the Actions activity menu.

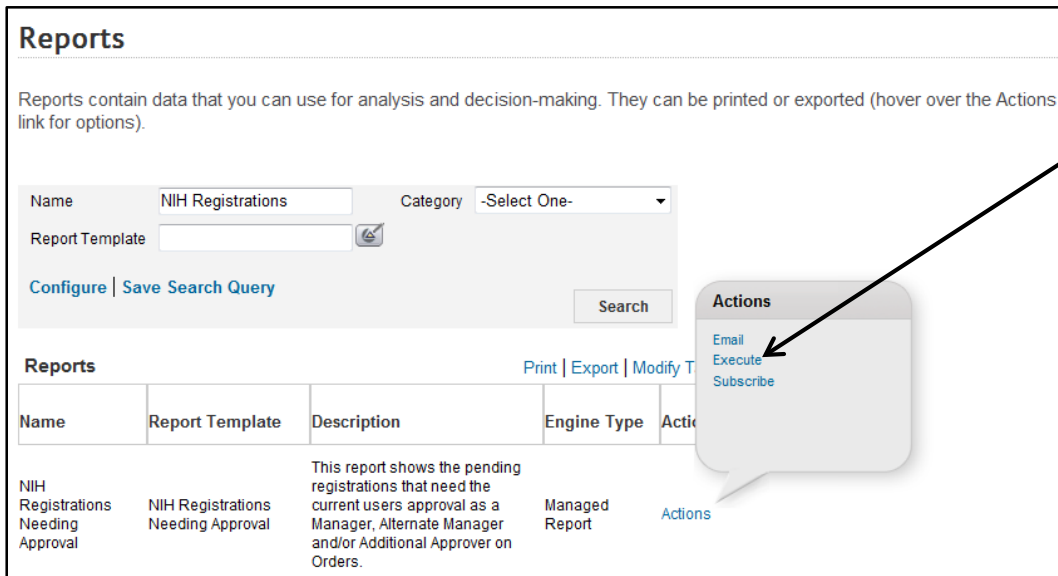


Figure 5 – Execute link on the Actions activity menu

7. To generate the list of your own pending approvals, select the **Generate Report** button.

Report Parameters - NIH Registrations Needing Approval

Do NOT generate my pending approvals list

Approver Name

Generate Report Cancel

Generate Report button

Figure 6 – Generate Report button

8. To generate the list of another approver's pending approvals, select the **Do NOT generate my pending approvals list** checkmark and then select the **Approver Name** pick icon.

Do NOT generate my pending approvals list checkbox

Report Parameters - NIH Registrations Needing Approval

Do NOT generate my pending approvals list

Approver Name

Generate Report Cancel

Approver Name pick icon

Figure 7 – Do NOT generate my pending approvals list checkbox and Approver Name pick icon

9. Enter the first and last name of the other approver in the **First Name** and **Last Name** fields and select the **Search** button.

Last Name field

The screenshot shows a web form titled "Search Person, Internal". At the top, there is a heading "Supervisors: you can easily display all of your staff by entering your login ID into the 'Manager' field, clicking the Magnifying Glass graphic, and then clicking the 'Search' button." Below this, the form is organized into two columns of input fields. The left column includes: "Population" (a dropdown menu set to "Internal"), "Last Name" (a text input field), "Username" (a text input field), "Organization" (a text input field with a magnifying glass icon), "Domain" (a text input field with a magnifying glass icon), "Security Roles" (a dropdown menu set to "-Select One-"), and "Terminated Before" (a date input field with a calendar icon). The right column includes: "First Name" (a text input field), "Person ID" (a text input field), "Manager" (a text input field with a magnifying glass icon), "Location" (a text input field with a magnifying glass icon), "Person Type" (a dropdown menu set to "-Select One-"), "Terminated After" (a date input field with a calendar icon), and "Include All Suborganizations" (a checkbox). A "Search" button is located at the bottom right of the form area. Three arrows point from external text labels to specific fields: "Last Name field" points to the "Last Name" input, "First Name field" points to the "First Name" input, and "Search button" points to the "Search" button.

First Name field

Search button

Figure 8 – First Name and Last Name fields and Search button

10. Select the checkbox for the name of the other approver.

Select checkbox

Search Person, Internal

Supervisors: you can easily display all of your staff by entering your login ID into the "Manager" field, clicking the Magnifying Glass graphic, and then clicking the "Search" button.

Population* Internal

Last Name alternate

Username

Organization

Domain

Security Roles -Select One-

Terminated Before

First Name nih

Person ID

Manager

Location

Person Type -Select One-

Terminated After

Include All Suborganizations

Search

People Print | Export

Showing 1 out of 1 results

select	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input type="checkbox"/>	NIH	ALTERNATEMANAGER	NIHALTERNATEMANAGER		00390467	HNAM6		

Figure 9 – Select checkbox

11. Select the **Generate Report** button.

Generate Report button

Report Parameters - NIH Registrations Needing Approval

Do NOT generate my pending approvals list

Approver Name NIHALTERNATEMANAGER

Generate Report Cancel

Figure 10 – Generate Report button

12. Review the information included in the report to determine accuracy, paying particular attention to the CAN to ensure the proper obligation of funds. Any orders without a CAN will display as N/A.

NOTE: Refer to LMS QRG [TS73-S: Review/Add CAN on an order—Manager or Alternate Manager](#) or [TS74-A: Review/Add CAN on an order-AAO](#) to modify a CAN if necessary.

13. To continue the process and approve the order, refer to the following LMS QRGs, depending on your role in the approval chain:

- [TS75-S: Approve Orders—Manager](#)
- [TS76-S: Approve Orders—Alternate Manager](#)
- [TS71-A: Approving Orders—AAO](#)

14. To print the report, select the **Print this report** icon.

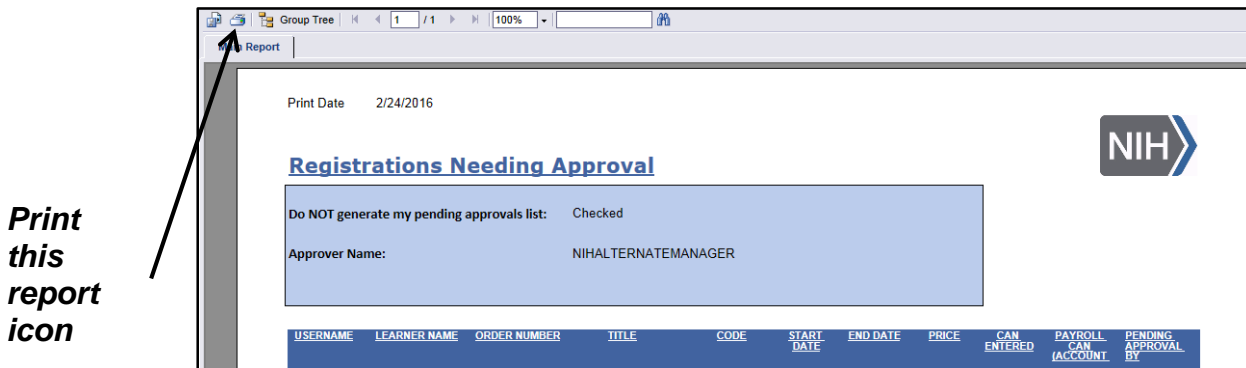


Figure 11 – Print this report icon

15. Select the Export button on the Print to PDF message box.

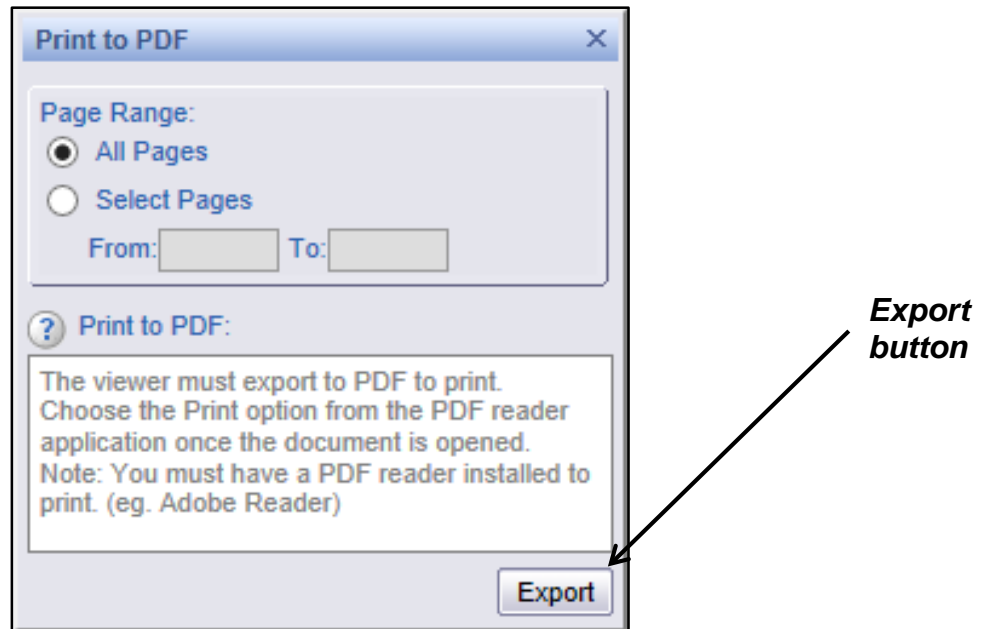


Figure 12 – Export button

16. Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification bar will display at the bottom of the screen in the Internet Explorer browser when the pdf has been created. Select the **Open** button on the notification bar to open the pdf file in Adobe Reader/Acrobat.

**Open
button**

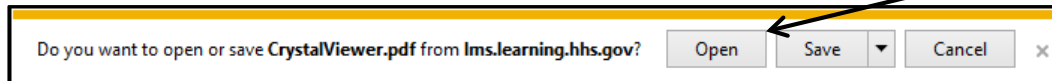


Figure 13 - Open button

17. Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please submit a helpdesk ticket at: <http://intrahr.od.nih.gov/helpdeskform.htm>