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.

My Team icon

Figure 1 – My Team icon

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

Reports link

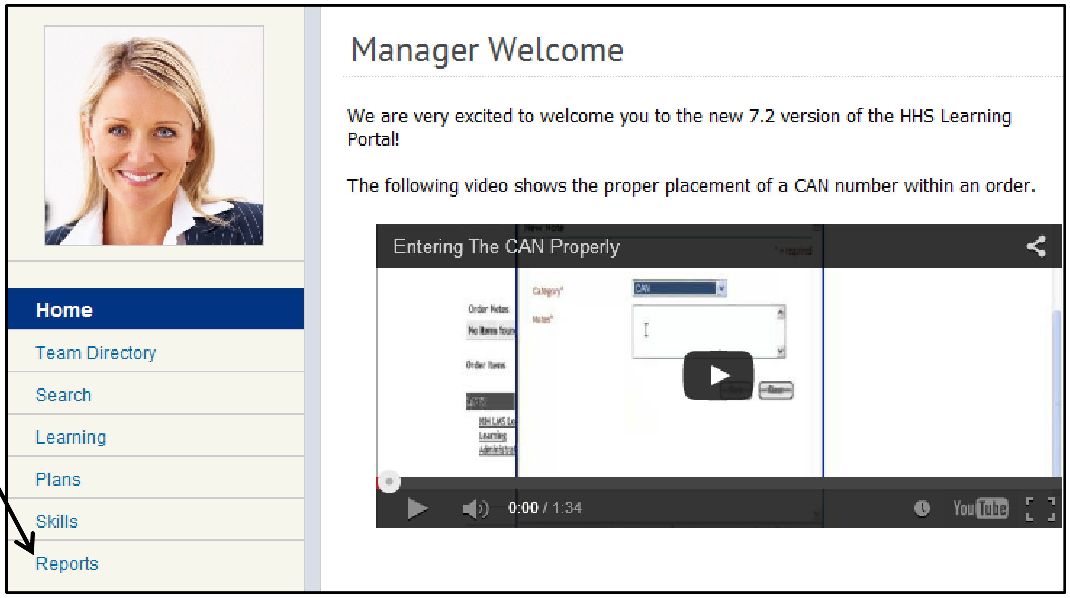


Figure 2 – Reports link

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

Name field

Search button

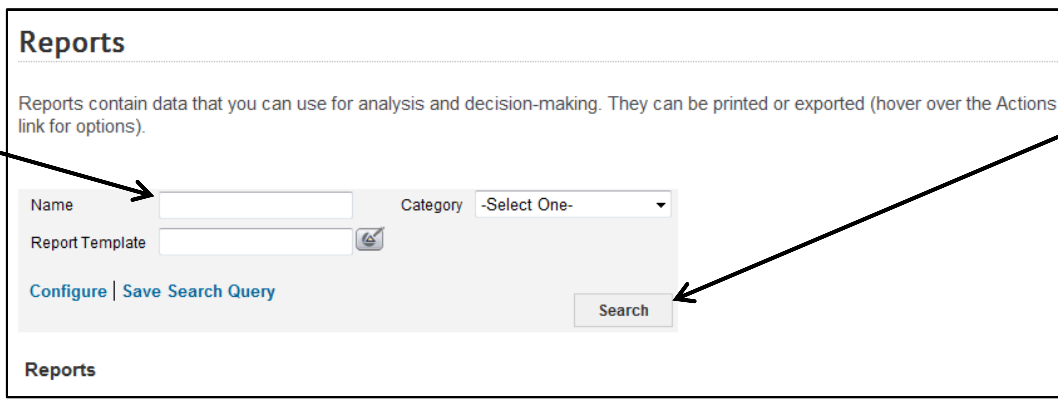


Figure 3 – Name field and Search button

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

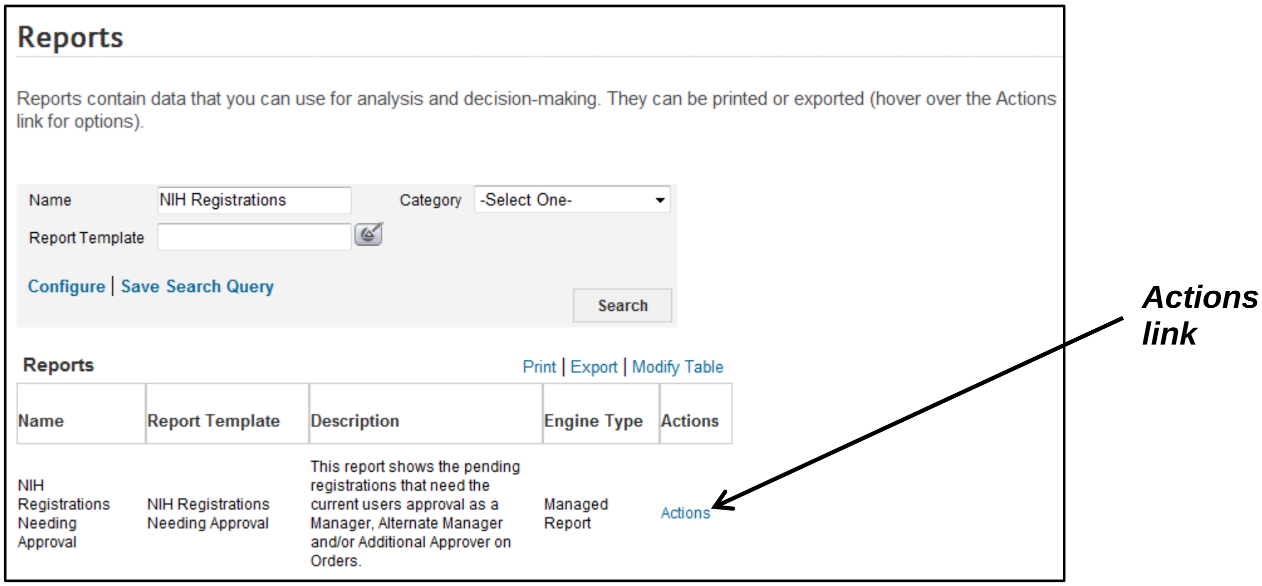


Figure 4 – Actions link

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

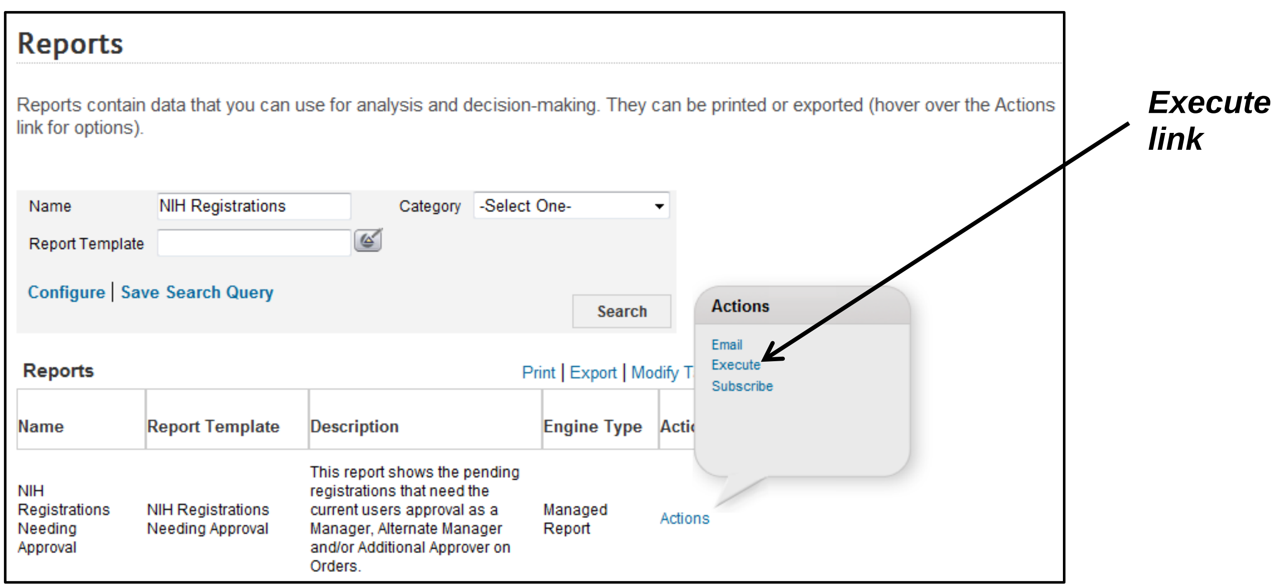


Figure 5 – Execute link on the Actions activity menu

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

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.

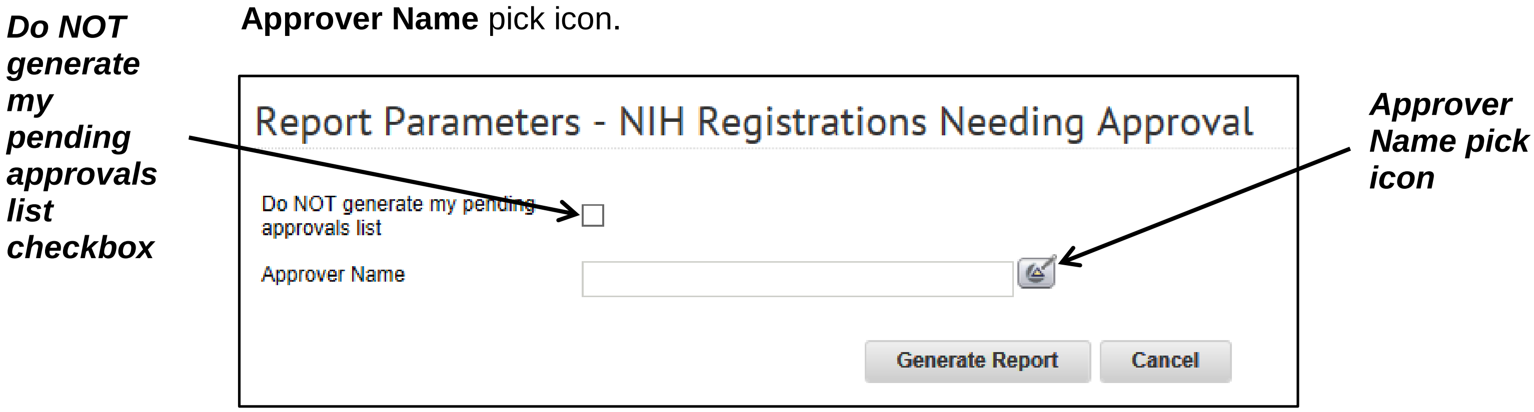


Figure 7 – Do NOT generate my pending approvals list checkbox and Approver Name pick icon

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

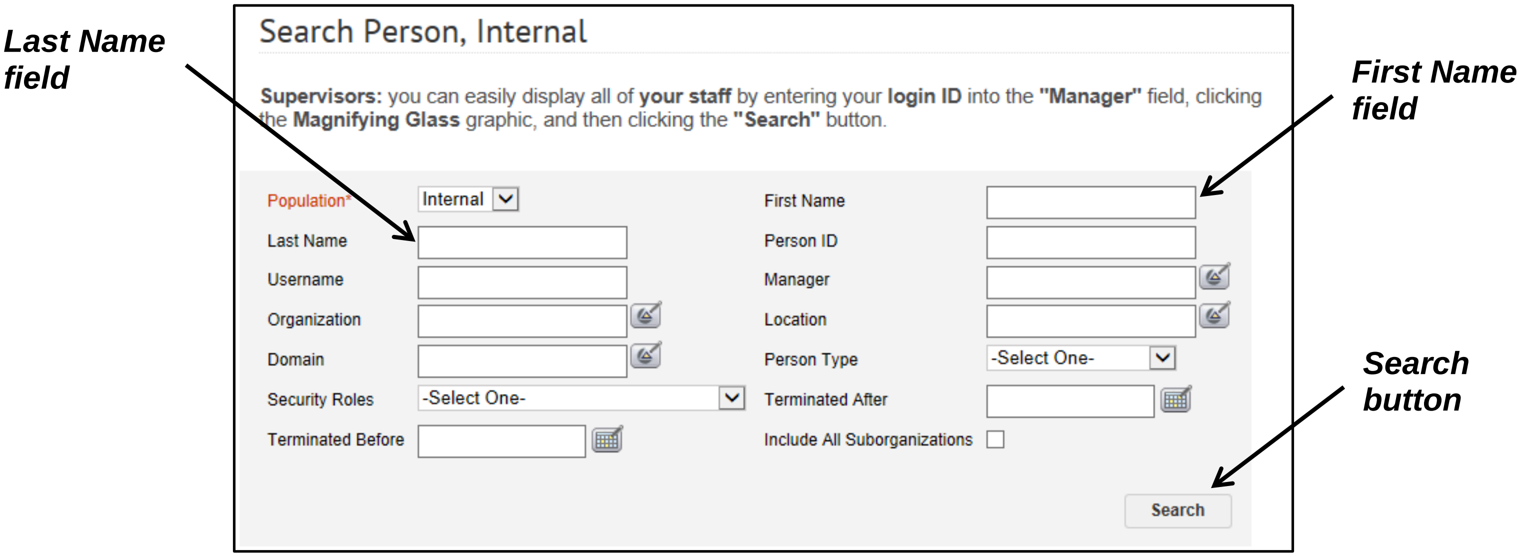


Figure 8 – First Name and Last Name fields and Search button

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

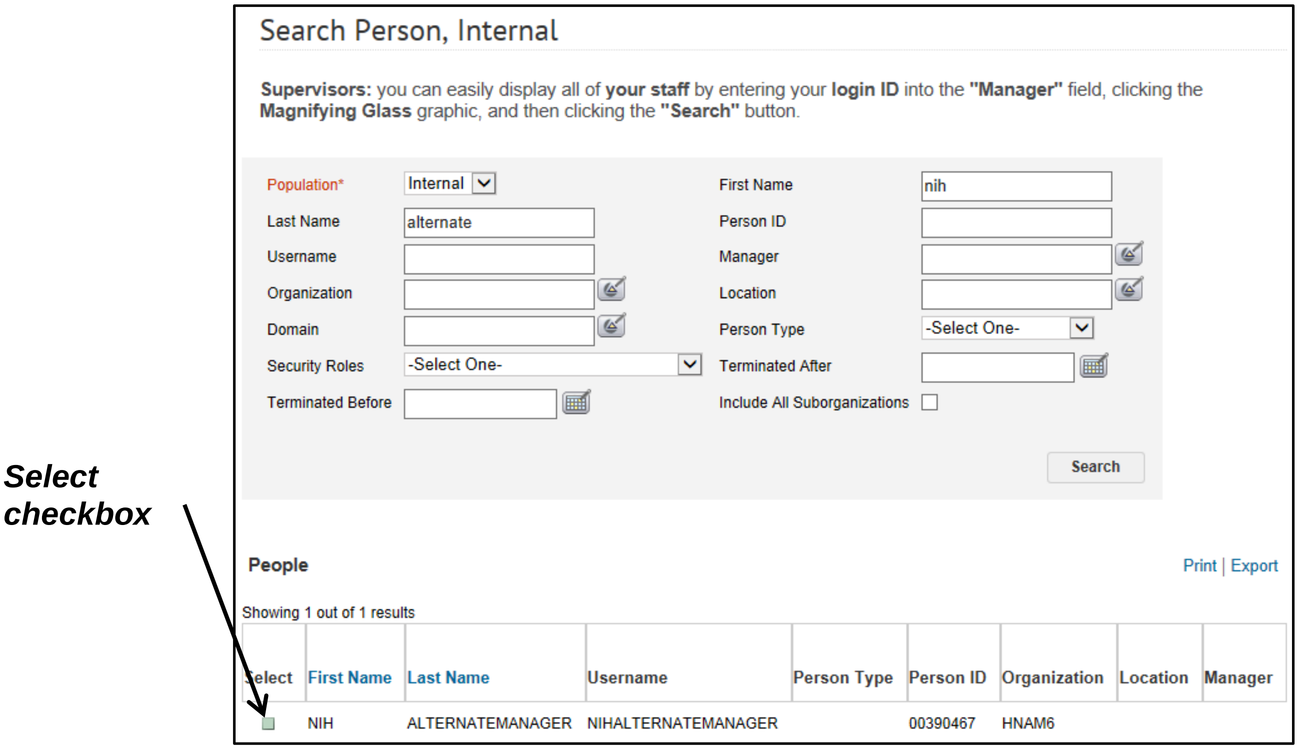


Figure 9 – Select checkbox

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

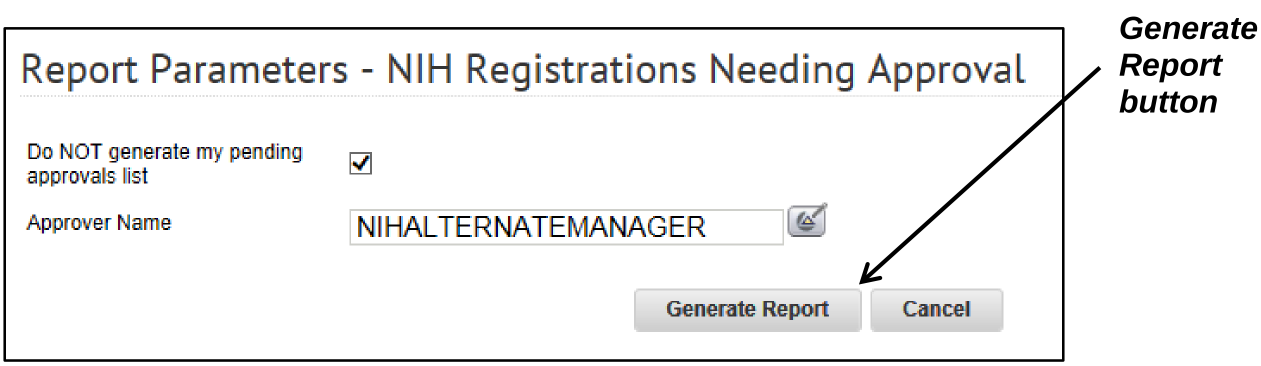


Figure 10 – Generate Report button

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.

Print this report icon

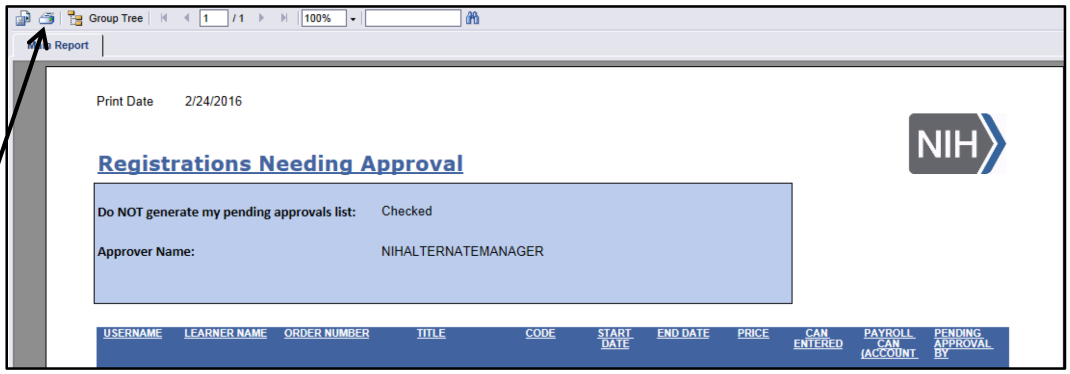
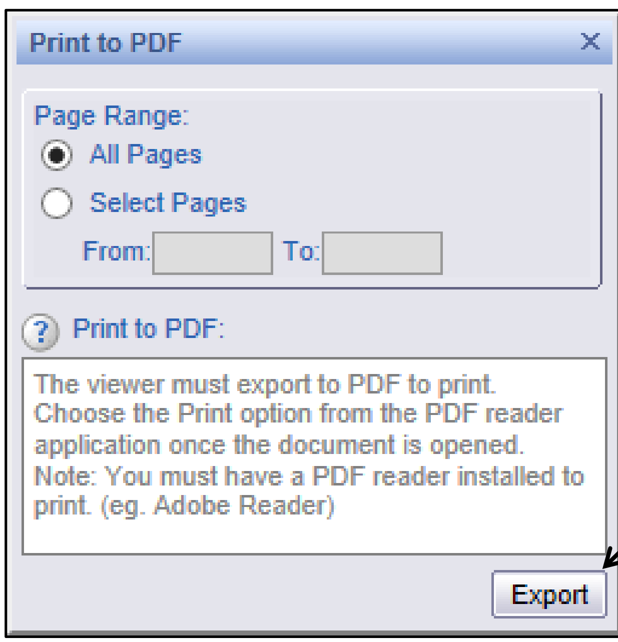


Figure 11 – Print this report icon

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



Export button

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

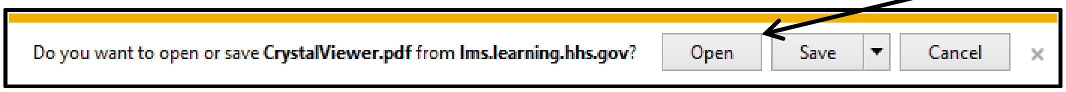


Figure 13 - Open button

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