



LEARNING MANAGEMENT SYSTEM (LMS) **RUNNING THE NIH ORDER APPROVALS BY APPROVER REPORT**

This QRG provides instructions for generating the NIH Order Approvals by Approver Report. This report lists all fully approved orders that were approved by a Manager, an Alternate Manager, an Alternate Approver for Orders (AAO), or an LMS Administrator for a specific date range (not to exceed 365 days). This report can create a list of approved training that an approver can submit to their Budget Officer.

1. Log into the LMS.
2. Click the Admin icon.



Figure 1 – Admin icon

3. Click the Reports link from the left navigation menu.

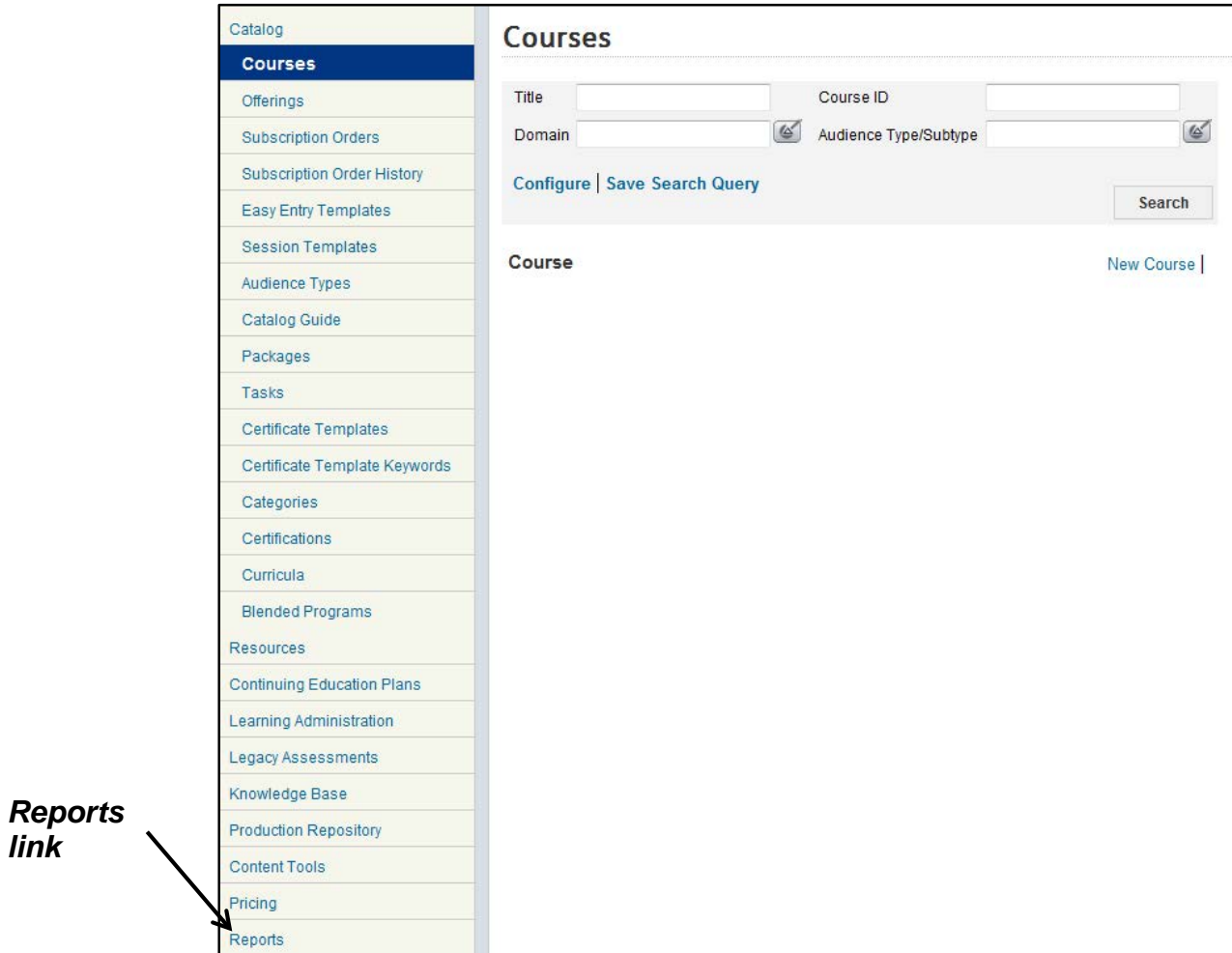


Figure 2 – Reports link

4. Enter NIH Order Approvals by Approver in the Name field and click the **Search** button.

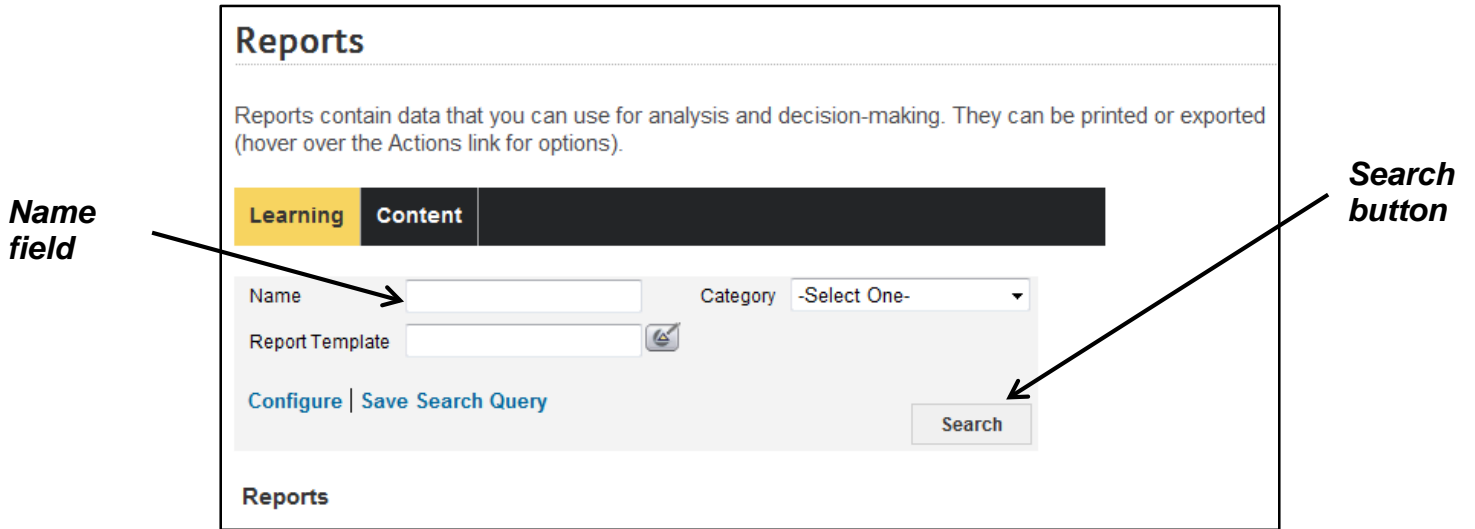


Figure 3 – Name field and Search button

5. Click the **Actions** link for the NIH Order Approvals by Org/Approver Report.

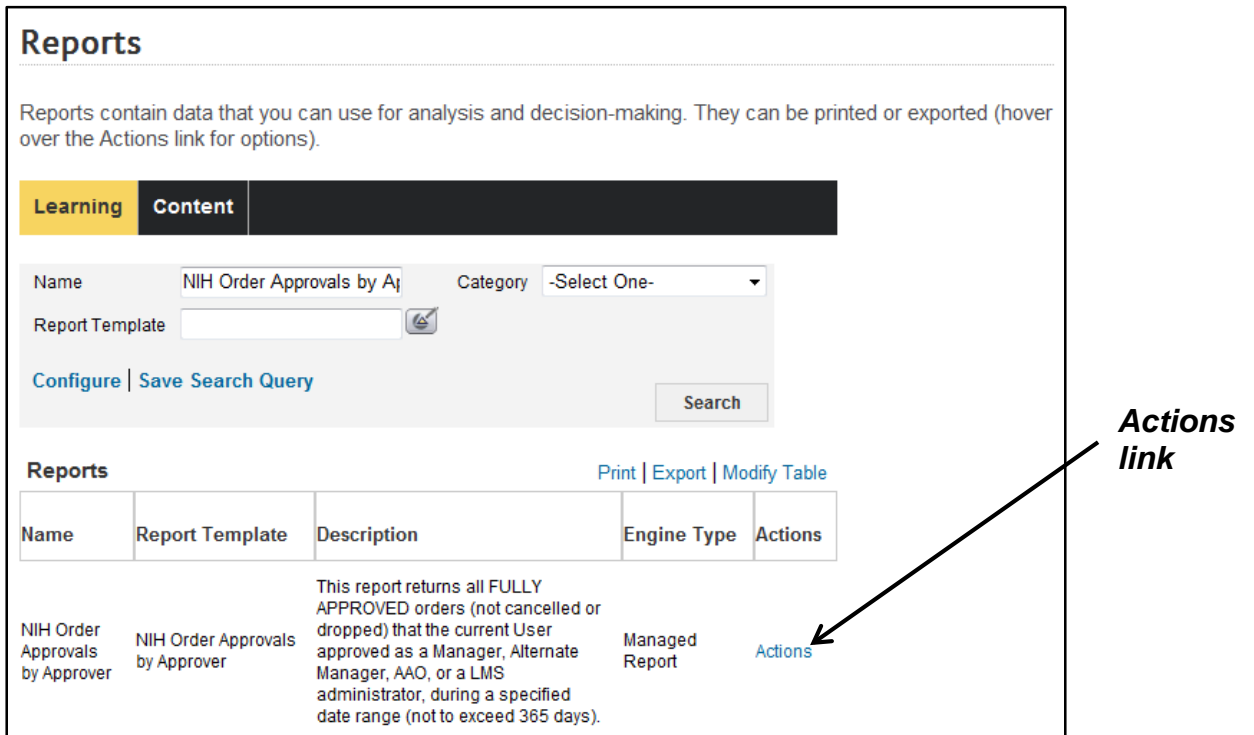


Figure 4 – Actions link

- Click the **Execute** link on the Actions activity menu.

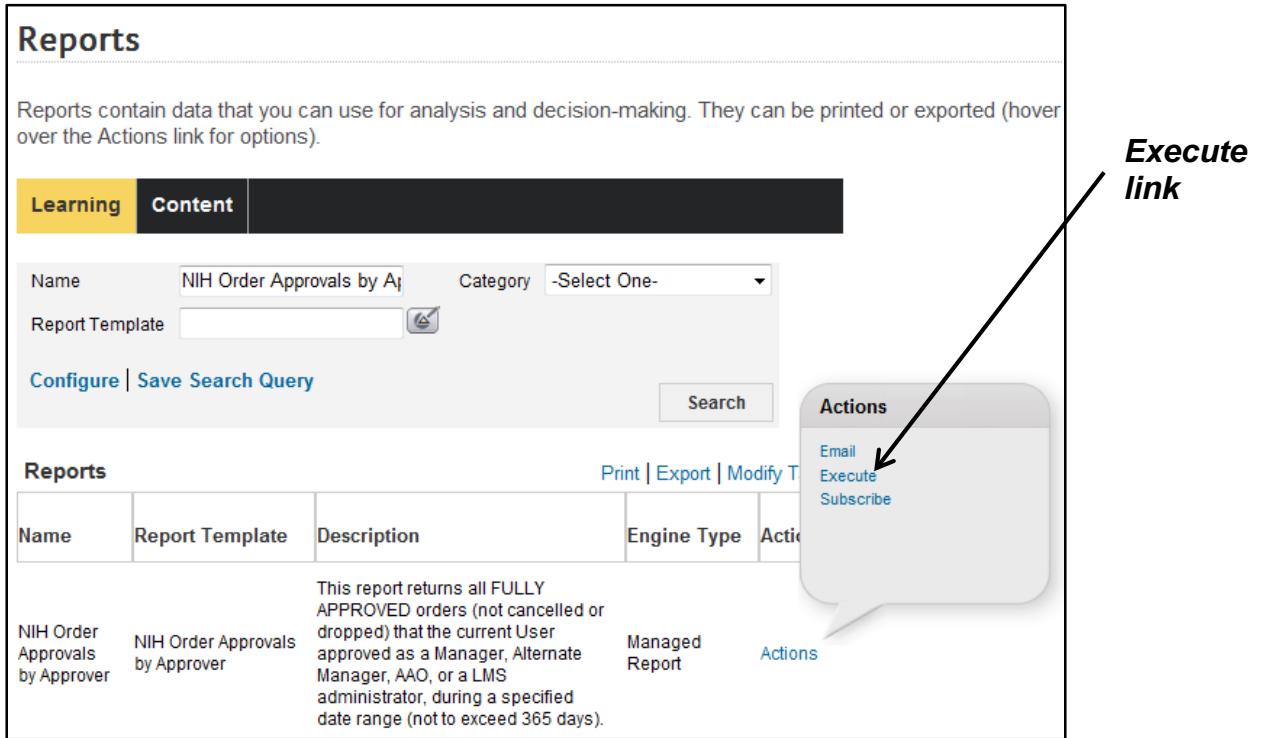


Figure 5 – Execute link on the Actions activity menu

- The default date range for the report is the last year (365 days). If you want to change the date range, enter the From Order Approval Date and To Order Approval Date in the appropriate fields in MM/DD/YYYY format. Alternately, you can use the **From Order Approval Date** and **To Order Approval Date** pick icons to select the date.

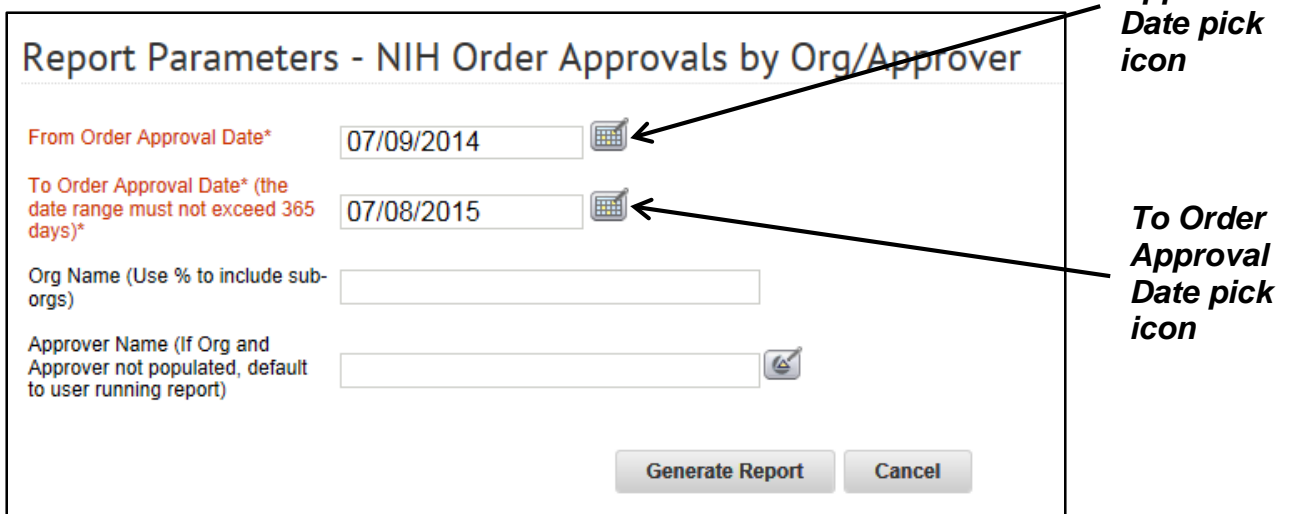


Figure 6 – From Order Approval Date and To Order Approval Date pick icons

- To identify a specific Organization, enter an Org Name in the **Org Name** field. Enter a percent symbol (%) as a wildcard to include all of the sub Organizations.

Report Parameters - NIH Order Approvals by Org/Approver

From Order Approval Date* 07/09/2014

To Order Approval Date* (the date range must not exceed 365 days)* 07/08/2015

Org Name (Use % to include sub-orgs)

Approver Name (If Org and Approver not populated, default to user running report)

Generate Report Cancel

Org Name field

Figure 7 – Org Name field

- To identify a specific Approver, select the **Approver Name** pick icon

Report Parameters - NIH Order Approvals by Org/Approver

From Order Approval Date* 07/09/2014

To Order Approval Date* (the date range must not exceed 365 days)* 07/08/2015

Org Name (Use % to include sub-orgs) HNA%

Approver Name (If Org and Approver not populated, default to user running report)

Generate Report Cancel

Approver Name pick icon

Figure 8 – Approver Name pick icon

- Enter the last name of an AAO in the **Last Name** field and then select the **Search** button.

Last Name field

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* First Name

Last Name Person ID

Username Manager

Organization Location

Domain Person Type

Security Roles Terminated After

Terminated Before Include All Suborganizations

People

Search button

Figure 9 – Last Name field and Search button

11. Click the Select checkbox to select the AAO.

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* First Name

Last Name Person ID

Username Manager

Organization Location

Domain Person Type

Security Roles Terminated After

Terminated Before Include All Suborganizations

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	ADDITIONALAPPROVER	NIHADDITIONALAPPROVER		00390466	HNAM6		

Figure 10 – Select checkbox

12. Click the **Generate Report** button.

Report Parameters - NIH Order Approvals by Org/Approver

From Order Approval Date*

To Order Approval Date* (the date range must not exceed 365 days)*

Org Name (Use % to include sub-orgs)

Approver Name (If Org and Approver not populated, default to user running report)

Generate Report **Cancel**

Generate Report button

Figure 11 – Generate Report button

13. To print the report, click the **Print this report** icon.

Print this report icon

NIH Order Approvals by Org/Approver

From Order Approval Date: 07/09/2014 Org Name: HNA%

To Order Approval Date: 07/08/2015 Approver Username: NIHADDITIONALAPPROVER

Note: This report returns all FULLY APPROVED orders that were not cancelled or dropped

HHS ID	Learner Name	Order Creation Date	Order Number	Document #/Order Line Item	Course Title	Course ID	Start Date	End Date	Price	CAN	Approval Date	Approver Name	Approver HHS ID
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Figure 12 – Print this report icon

14. Click the **Export** button on the Print to PDF message box.

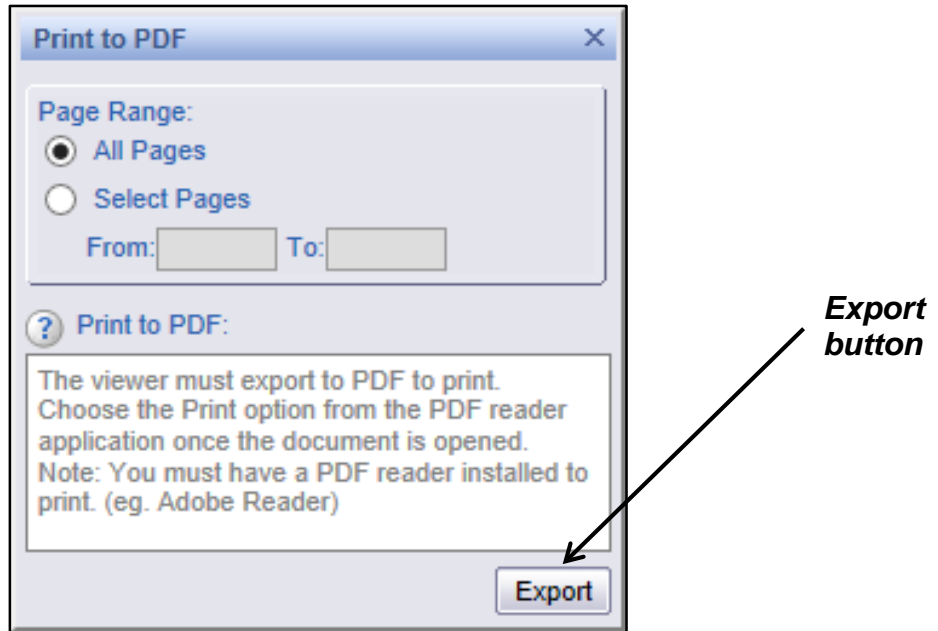


Figure 13 – Export button

15. 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. Click the **Open** button on the notification bar to open the pdf file in Adobe Reader/Acrobat.

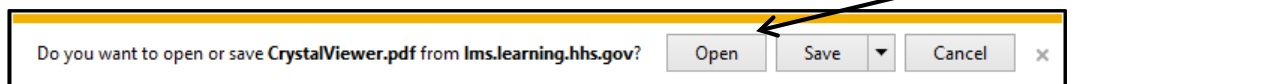


Figure 14 – Open button

16. 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>