



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.

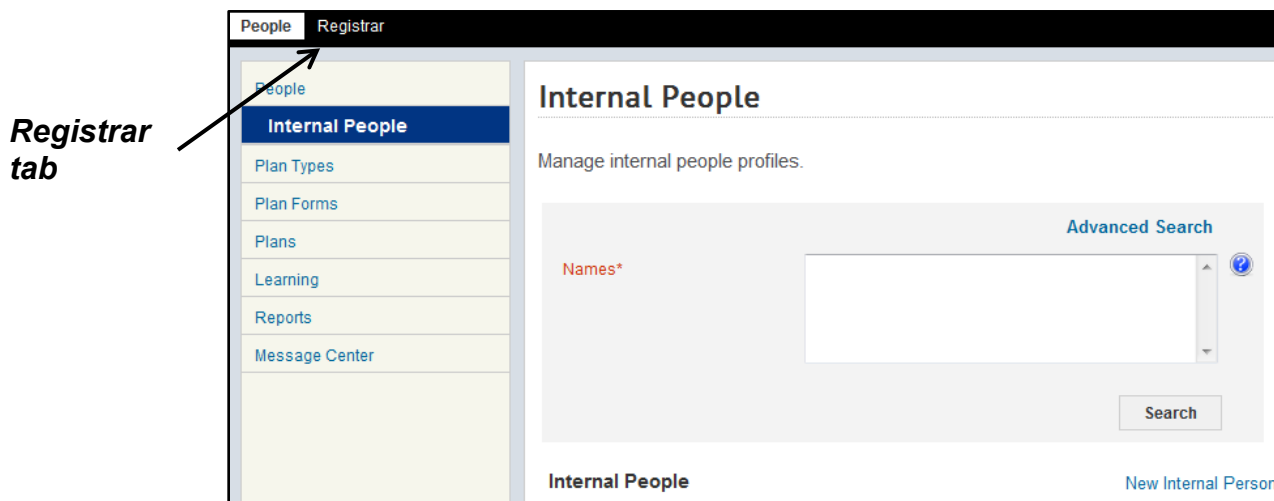
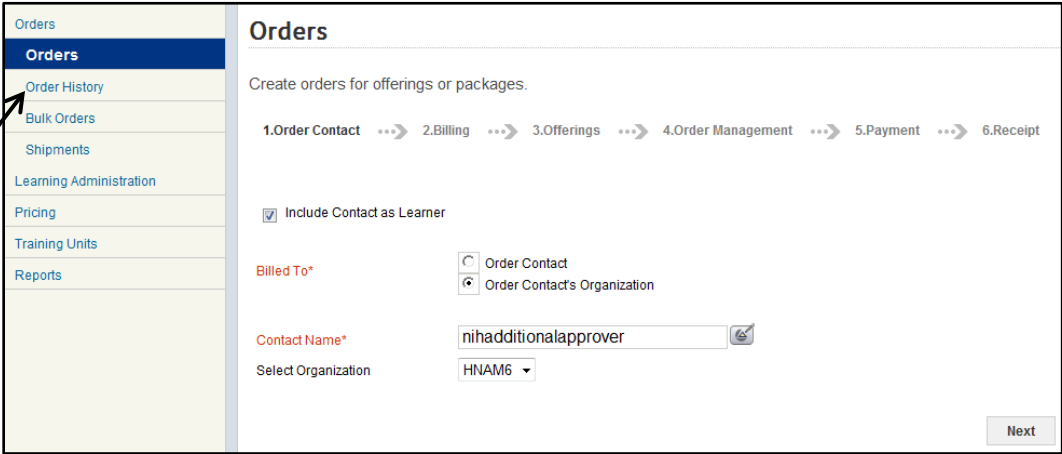


Figure 2 – Registrar tab

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

Order History link

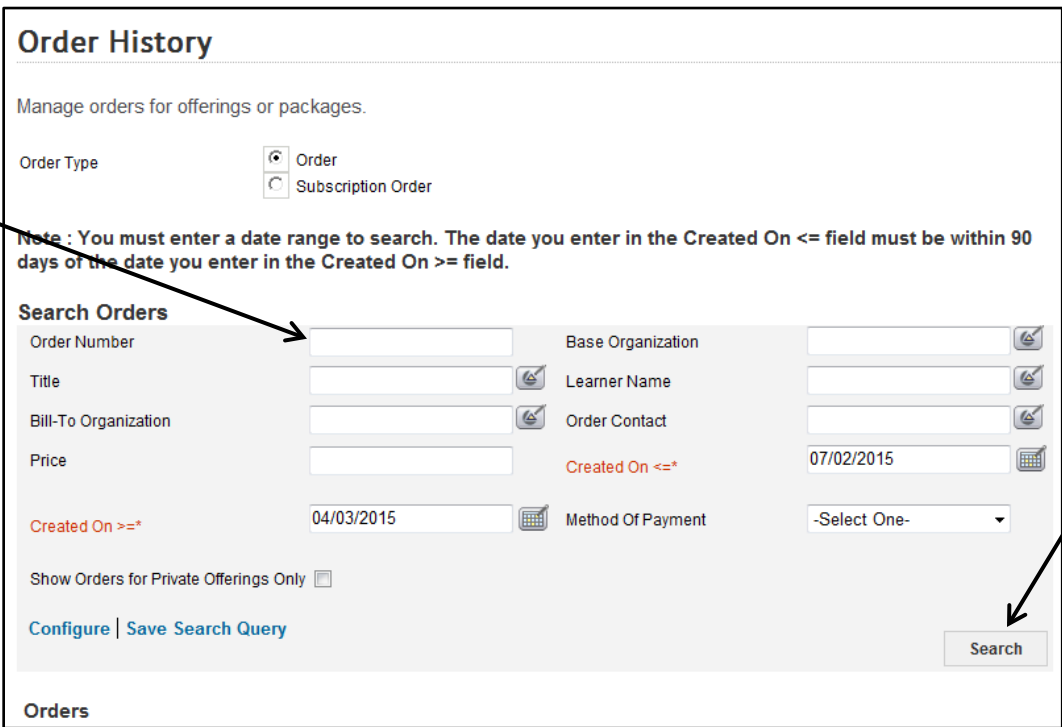


The screenshot shows the 'Orders' page in a web application. On the left, there is a navigation menu with the following items: Orders, Order History, Bulk Orders, Shipments, Learning Administration, Pricing, Training Units, and Reports. The 'Order History' link is highlighted with a blue bar, and an arrow points to it from the label 'Order History link'. The main content area is titled 'Orders' and contains the text 'Create orders for offerings or packages.' Below this, there is a progress bar with steps: 1.Order Contact, 2.Billing, 3.Offerings, 4.Order Management, 5.Payment, and 6.Receipt. There are several form fields: 'Include Contact as Learner' (checked), 'Billed To*' (radio buttons for 'Order Contact' and 'Order Contact's Organization'), 'Contact Name*' (text input with 'nihadditionalapprover'), and 'Select Organization' (dropdown menu with 'HNAM6'). A 'Next' button is at the bottom right.

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.

Order Number field



The screenshot shows the 'Order History' page in a web application. The title is 'Order History' and the subtitle is 'Manage orders for offerings or packages.' There are radio buttons for 'Order Type' with options 'Order' and 'Subscription Order'. A note states: '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.' Below this is a 'Search Orders' section with several form fields: 'Order Number', 'Title', 'Bill-To Organization', 'Price', 'Base Organization', 'Learner Name', 'Order Contact', 'Created On <=*' (with date '07/02/2015'), 'Created On >=*' (with date '04/03/2015'), and 'Method Of Payment' (dropdown menu with '-Select One-'). There is a checkbox for 'Show Orders for Private Offerings Only'. At the bottom left, there are links for 'Configure' and 'Save Search Query'. At the bottom right, there is a 'Search' button. An arrow points from the label 'Order Number field' to the 'Order Number' input field, and another arrow points from the label 'Search button' to 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	02492060	Base Organization	
Title		Learner Name	
Bill-To Organization		Order Contact	
Price		Created On <=	07/02/2015
Created On >=	04/03/2015	Method Of Payment	-Select One-

Show Orders for Private Offerings Only ☐

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

Orders

Showing 1 out of 1 results

Order Number	Order Contact	Bill-To Organization	Price	Status	Title	Learner Name	Offering Type	Created On	Version	Mandatory
02492060	NIH Manager	HNAM6	683.00 USD	Confirmed	NIH LMS People Administrator		Public	06/29/2015	FY15	☐

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	Change Learner Reschedule Add CAN Drop	225.00 USD	

Total 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.

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

Add/View Notes

Notes

View By Category [ALL](#)

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

[Add Note](#)

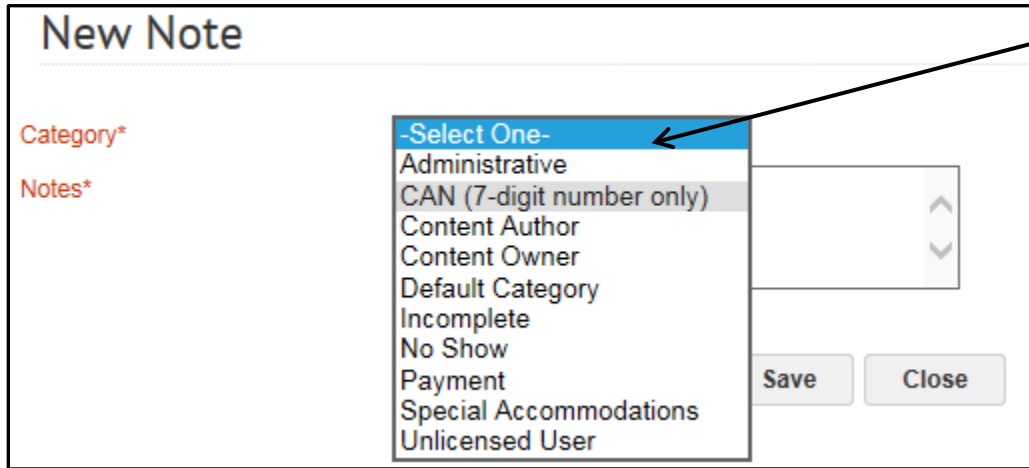
No items found

[Close](#)

Add Note link

Figure 7 – Add Note link

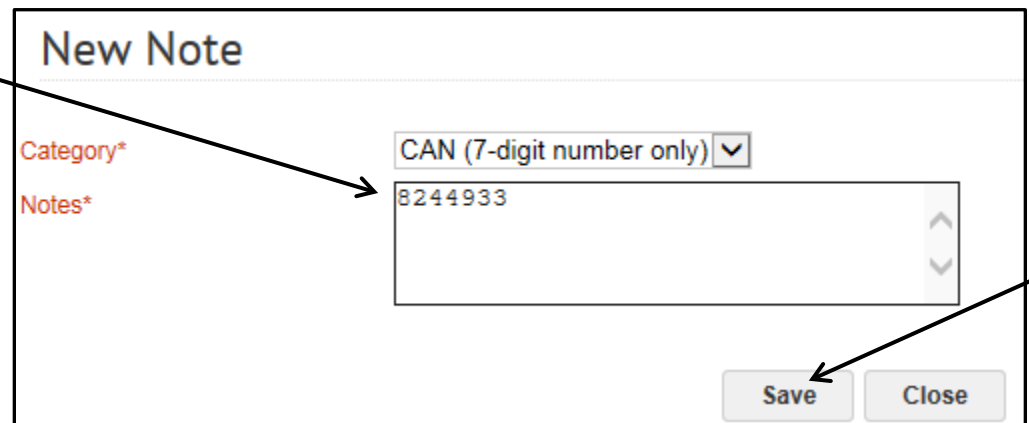
9. Select **CAN** from the Category pull-down menu.



The screenshot shows a 'New Note' form. The 'Category*' field has a pull-down menu open, displaying a list of options: '-Select One-', 'Administrative', 'CAN (7-digit number only)', 'Content Author', 'Content Owner', 'Default Category', 'Incomplete', 'No Show', 'Payment', 'Special Accommodations', and 'Unlicensed User'. The 'CAN (7-digit number only)' option is highlighted. An arrow points from the text 'Category pull-down menu' to the menu. The 'Notes*' field is empty. 'Save' and 'Close' buttons are at the bottom right.

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.



The screenshot shows the 'New Note' form. The 'Category*' field now displays 'CAN (7-digit number only)' with a dropdown arrow. The 'Notes*' field contains the text '8244933'. An arrow points from the text 'Notes field' to the text in the field. The 'Save' and 'Close' buttons are at the bottom right. Another arrow points from the text 'Save button' to the 'Save' button.

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.

Add/View Notes

Notes

View By Category **ALL**

Generally used to capture short comments and suggestions about learning content and training courses. [Add Note](#) | [Modify Table](#)

Showing 1 out of 1 results

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

Close button

Close

Figure 10 – Add/View Notes page with added CAN

12. Select the Inbox icon.

HHS Learning Portal
The Joy of Learning Enabled Through Access!

Inbox icon

NIH AdditionalApprover

Figure 11 – Inbox icon

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

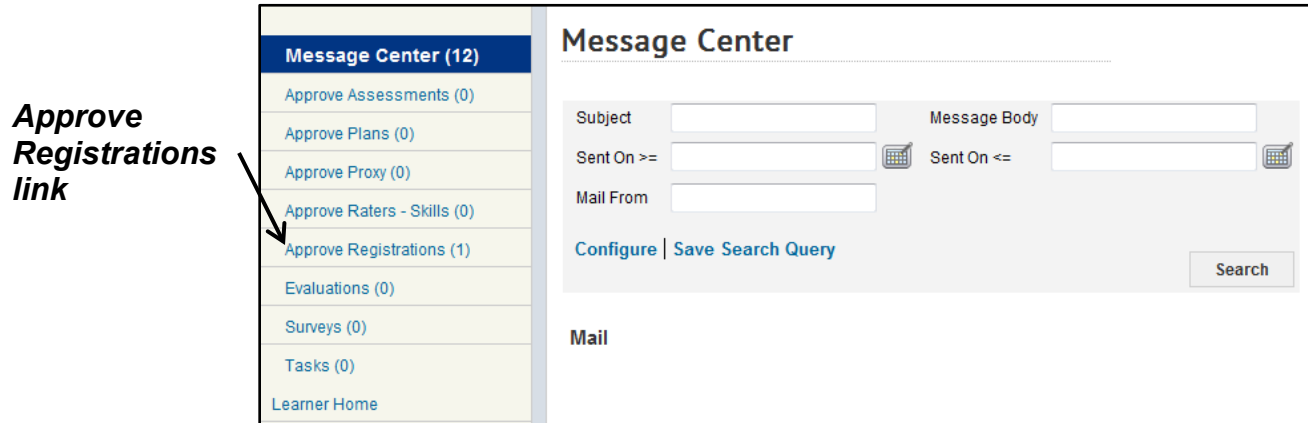


Figure 12 – Approve Registrations

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.

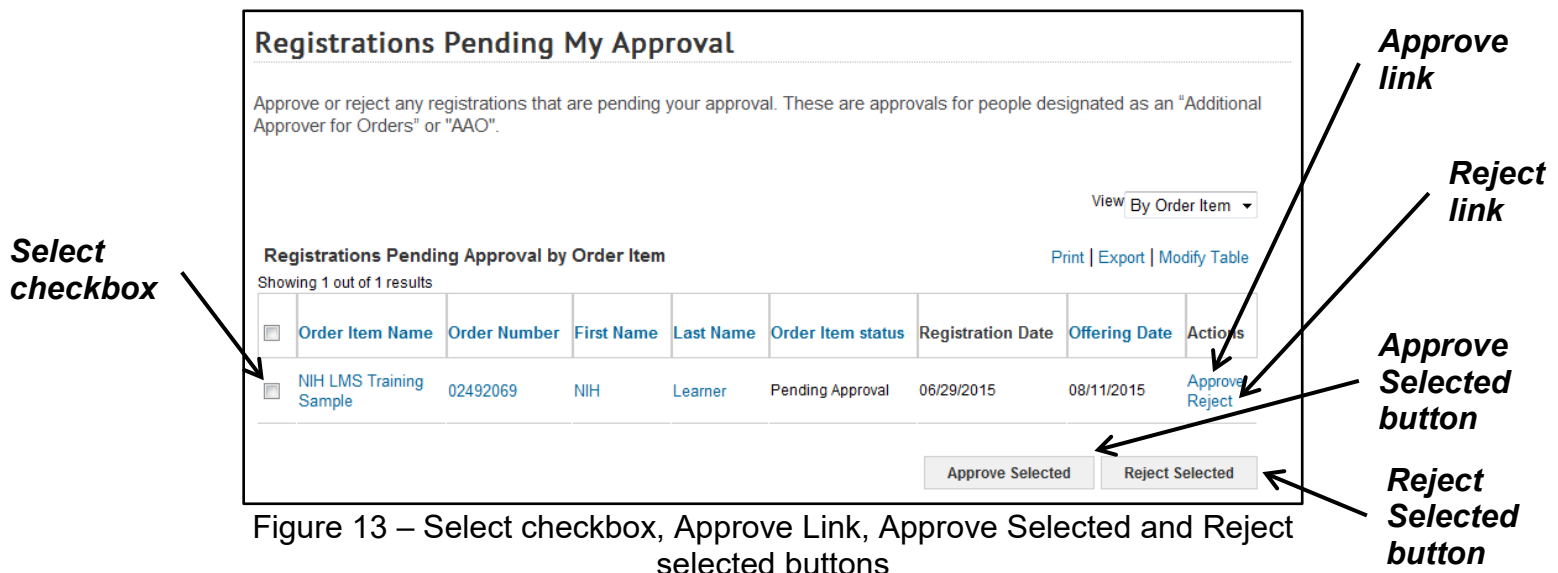


Figure 13 – Select checkbox, Approve Link, Approve Selected and Reject selected buttons

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](#).