Quick Reference Guide for Approving Grants

1. Locate and double click on the “Hyland Unity Client” icon on your desktop. Onbase can be installed on your machine by contacting the Technical Assistant Center at (717) 871-7777.

2. Log into OnBase using your Millersville domain account. The username will type/display as all caps, however, the password will not.
NAVIGATE TO THE APPROVAL PROCESS

1. Click “Workflow” icon.

2. Expand the “Life Cycle” by double clicking “GRANT Approval Process”. Below the “GRANT Approval Process” are the queues you have access to.
3. Click on “GRANT Approval” queue. In the “Inbox” section, click on the proposal you wish to view. The approval form will open up in the “Primary Viewer” section.
4. There are 3 sections in OnBase Workflow to assist you with approving a proposal.

a. **Related Documents** – lists the proposal and supporting documents
b. **Approval Form** – the form in which you make your decision and sign
c. **Route/Send Document** – sends the document to the next approver or returns the proposal to the Grant Director

VIEW PROPOSAL AND SUPPORTING DOCUMENTS

1. Double click on “Proposal Form” located in the “Related Documents” section.
2. A second window will open and display the submitted proposal.

3. Double click any of the supporting documents to review them.

**READING NOTES**

Notes may have been created and attached to the proposal by your colleagues on any of the proposal documents. If a note exists, you will see it indicated in the top right corner of the form.

1. Click on the notes icon, and the content of the notes will be displayed on the right hand side of the display. 
   *Note:* The “Note for Grant Approvers” is a note type that only people in the approval process can create or view. The “Public Note” can be viewed by anyone that has access to the documents, including the PI.
APPROVE/DECLINE PROPOSAL

When you have made your decision, fill out your section of the “Approval Form”. Scroll down until you find your name in the “Approver Name” box, then...

1. Check “Approve” or “Decline” and sign by typing your full name.  
   Note: You will be able to make comments in the lower comment box that can be viewed by other approvers and the Grant Director. If you “Decline” the proposal, a comment will be required.

2. Save the form.

3. Send/Route the proposal to the next approver. If you declined the proposal, the proposal will be returned to the Grant Director.

You have completed the steps of approving a grant proposal. If you have questions on this process, please contact René Muñoz at (717) 871-4451.

Contact the Help Desk at (717) 871-7777 if you are experiencing technical difficulties.