Quick Reference Guide for Approving Grants

Introduction
Below are instructions on how to Approve a Grant Proposal using the OnBase web client. Typically you would only use this web client if you are off campus or a Mac user. On-Campus Window’s users are encouraged to use OnBase Unity client.

Browser Support
Internet Explorer and Firefox 17 ESR are the only two browsers supported. If you are a Mac user, please contact the Help Desk (717) 871-7777 for assistance installing Firefox 17 ESR.

1. Use the following link to start up the Web version of OnBase 12. If you bookmark the page, you will have easy access in the future.

   https://obprod.millersville.edu/AppNet/Login.aspx

2. Log into OnBase using your Millersville domain account. The username will type all caps, however, the password will not.
START APPROVAL PROCESS

1. From the first drop down menu select “Workflow.”

2. A second window will open. Click the plus sign next to “GRANT Approval Process.”

3. Select the “GRANT Approval.”
4. The “GRANT Approval” queue will open with all of the Proposals that are available for your approval.

There are 4 sections in OnBase Workflow to assist you with approving a proposal.

a. **Document Queue** – lists all Grants available for your review.

b. **Related Documents** – lists the Grant Proposal and its supporting documents.

c. **Form/Document Display** – displays the Approval form and Supporting Documentation.

d. **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. The Proposal will now show in the Form/Document Display.

3. Each supporting document can be displayed in the “Form/Document Display” by double clicking the document or form you would like to see in the “Related Documents” section.
READING NOTES

Notes may have been created and attached to the proposal by your colleagues on any of the proposal documents.

To check for notes on Proposal Form:

1. Double click on “Proposal Form” in “Related Documents.”
2. Right click on the Form and choose “view notes.”
3. A window will pop up with any notes that have been attached.
To check for notes on *Other Related Documents*:

1. Double click on document in “Related Documents.”
2. Click on “View Notes” icon.

**APPROVE/DECLINE PROPOSAL**

When you have made your decision, return to “Approval Form” by double clicking the form in the “Document Queue.”
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.

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**You have completed the steps of submitting a Grant Proposal**

**Technical Difficulties,**

please contact the Help Desk at (717) 871-7777.