Quick Reference Guide for Faculty & Staff
MU Grant Proposal Approval

Introduction
Below are instructions on how to create 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 Windows 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 (X2371) 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.

   ![OnBase 12 Login](https://obprod.millersville.edu/AppNet/Login.aspx)
INITIATE FORM

1. From the second drop down menu select “Document.”

2. From the second dropdown below “Document”, select “New Form.”

3. Select the “Grant Proposal Form.”
4. Enter your MU ID and then click in another field and some of your information will auto-populate on the form; correct the information if necessary.

5. <click> “Send to Workflow.”

YOUR FORM WILL SAVE & DISAPPEAR FROM VIEW!!!.... you can pick up your form in Workflow
While in workflow you will be able to add supporting documents and complete the entire form.

RETRIEVE FORM IN WORKFLOW

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

Click dropdown
2. A second browser screen will open up. Maximize this window. <click> the plus sign next to “GRANT Approval Process”

3. <click> on “GRANT Principle Investigator”
4. Click on your proposal form document. There are 4 sections that will assist you with completing the proposal:
   a. Work Folder Section – displays supporting documents you have added.
   b. Document Listing Section – lists all Grant Proposals you have started.
   c. Action Toolbar – Series of buttons to attach supporting documents and Send Proposal to Grant Office.
   d. Form Entry Section – bottom section that allows you to complete all the fields of the form.
FORM ENTRY

1. Notice there are five separate tabs in the Form Entry section. <click> on each tab and you will notice different sets of information requested.

2. Save as you Go!

There are two “Save Buttons” on each tab. One in the top right corner and one in the bottom left. For security reasons OnBase is set to timeout after a period of time. Save your document often to avoid losing changes you have made to the form.
1. Go to Action Toolbar.

2. Click on button corresponding to the support document you wish to attach to the proposal form.

3. You will be prompted to locate documents on your machine.

4. Click Browse... and find your document.

5. After selecting your supporting document click the “import” (add) button.
6. You will see your document in the Work Folder.

**SEND PROPOSAL TO GRANT OFFICE**

CONFIRM you have imported your supporting documents. (Recall that your supporting documents are in the “WorkFolder” section.) Then...

1. CHECK the “Proposal Completed” checkbox.
2. SAVE - if form won’t save check all tabs for required fields to fill out.
3. Click “SEND TO GRANT DIRECTOR” on the “Action Toolbar”.

![Image of OnBase Work Folder with Proposal Narrative for Davis, Karen]

![Image of MU Grant Proposal interface with Proposal Completed checkbox, Save button, and Send to Grant Director button highlighted]
FAQ

I don’t see the Action Toolbar or some of the buttons are missing?

Answer: The web client is a little touchy when it comes to displaying the “Action Toolbar”. Try resizing the web browser (maximize), or click on the Blue Arrow to the right.

You have completed the steps of submitting a Grant Proposal

Technical Difficulties,

please contact the Help Desk at X2371.