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 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.
1. From the first 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.”
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.
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.
ADDING SUPPORTING DOCUMENTS

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”.

MU Grant Proposal

When you have completed this Proposal Form...

1. Confirm you have attached supporting documents. The “Proposal Narrative” and “Budget Narrative” are required documents.
2. Check the box below to indicate this form is complete.
3. Save the form. The form will not save until all the required fields are filled. Check all pages-tabs for required data.
4. Click “Send to Grant Director” above the form.

***NOTE...if the proposal is not ready for approval, UNCHECK the “Proposal Complete” checkbox. Required fields will not be enforced. You will be able to continue to save the form as you fill it out.***

OnBase®

Life Cycle View   Work Folder

Proposal Narrative for DAVIS, KAREN

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”.

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Proposal Narrative for DAVIS, KAREN
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 (717) 871-7777.