

Approver eGrants Instructions

Internet Browsers

It is recommended that you use the most current version of Mozilla Firefox. Our testing has proven that errors may occur using Safari, Chrome, Internet Explorer, and/or Microsoft Edge. You will also need to allow pop-ups for this site when prompted.

Logging into the test website.

- 1.) Go to <https://okstate-uat.keyusa.net> There will also be a link located in the e-mail you receive prompting action.
- 2.) Log into the system with your O-Key Credentials.
- 3.) As an Approver verify in the top right corner that it has your name and role. (Ex. WILSON (Oklahoma State University) –Approver.
- 4.) Your home Approver page should have a table with proposals waiting for your review and approval.
- 5.) Select any of the hyperlinks associated with the correct proposal. This will open a window for you to either “Edit” or “View”.
- 6.) You will need to click “**Edit**” button to sign the proposal.
 - a. ****Note:** Only one person at a time can edit the proposal. If someone else has the proposal open, you will need to contact them to close the proposal completely and log off of eGrants.
- 7.) The proposal will open up in a new window. If you have not allowed pop-ups for this site, you will need to do this at this time to continue.

Reviewing the proposal.

You may navigate to all of these areas via the menu on the left.

➤ Budget

- 1.) The “Budget Justification” is considered to be **one** combined PDF file that includes:
 - a. The **internal** budget/Excel sheet with the required GCFA details
 - b. The budget justification/narrative. Please note, once signed off by GCFA, no changes can be made to this information.
 - c. Any budget forms the sponsor requires would be attached here as “Budget Form(s)”.

➤ Attachments

- 1.) This area where you will review other supporting documentation.
 - a. Final Proposal/Application Forms(s)
 - b. Letter(s) of Support or Collaboration
 - c. Project Description/Narrative
 - d. Project Summary (Summary/Statement of Work)
 - e. Miscellaneous (Internal Forms, i.e. F&A Waivers)
 - f. Other (Subaward Forms)

Signing or Returning the proposal.

➔ Responsible Signatories

There are two options for the next step, you can either approve the proposal and forward it to the next approver in line or you may return to the PI with Return Comments.

- 1.) **APPROVE:** After reviewing the proposal, the "Approver" will then navigate to the "Responsible Signatories" page from the menu on the left.
 - a To "Approve" the proposal as is, place a check next to the "Signature" box and all applicable boxes, ("F&A" and "Cost Share"). To review the "F&A" and/or "Cost Share", you may select the hyperlink and direct you to that section.
 - b After you have approved the proposal, you will forward the proposal to the next person listed below yours by scrolling to the top of the page and clicking on the "Forward" button.

- 2.) **RETURN:** After reviewing the proposal, and you wish to return the proposal for corrections, the "Approver" will then navigate to the "Responsible Signatories" page from the menu on the left.
 - a ****Do NOT** put a check mark in the box next to your name to "Sign" the proposal if you wish to return the proposal. To "Return" the proposal, you will select the person (i.e. "Principal Investigator") you wish to return it to from the drop down arrow in the box next to the blue "Forward" button.

Financial Information	Principal Investigator		Return Proposal	Forward
Compliance Information	Approvals: Signatures acknowledge that the proposal is consistent with the university's policy objectives, that all parties' commitments to the project are met, and that the Principal Investigator/Co-PIs acknowledge all compliance requirements have been met.		Return Proposal	on/university
Cost Sharing	Name	WILSON, MELINDA JANE.	Principal Investigator	Principal
F&A Waiver/Reduction	Signature	<input checked="" type="checkbox"/> Sign		
Personnel Disclosures	Position	PD/PI		
Attachments			MELINDA WILSON 04/25/2016 14:40:53	
Responsible Signatories				
Print PDF				
Proposal Co-Developers				

- b After clicking on the down arrow, a pop-up window will appear. After adding any necessary comments, click "Send". This action will return the proposal.

Return Comments - Google Chrome

https://okstate-uat.keyusa.net/applicationform/returnNsendToPI.do?METHODNAME=PCFUser

Return Comments

Spell check Send Save Cancel

WILSON, MELINDA JANE.
Testing.

Apr 25, 2016 2:22:27 PM

After editing Comments, click "Send". This will return the proposal to the PI.