

**Step by Step Fiscal Officer Proposal Review Guide**

**Overview:**

This guide outlines the steps required by RAPPORT for a Fiscal Officer to review and approve a proposal.



Proposal path:

* Dept. Research Administrator or PI creates new proposal
* DRA routes for review, first to departmental reviewers, then OSP
* OSP submits to grants.gov

**Two ways to access RAPPORT:**

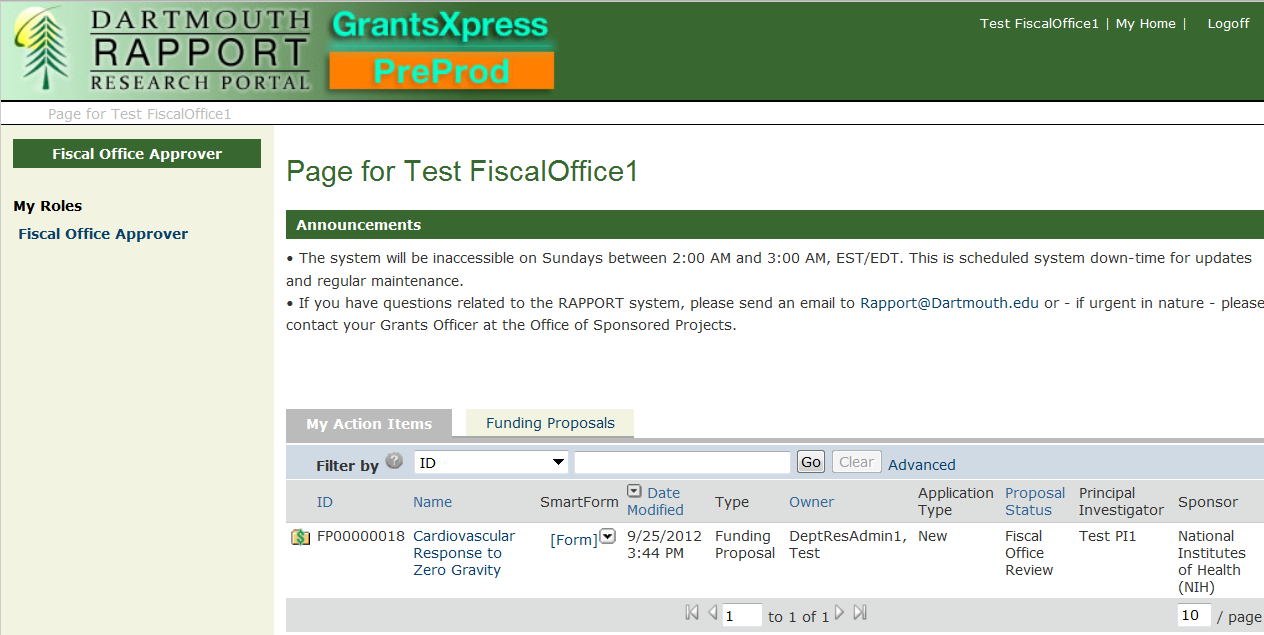
1. **Login to website**
2. **Click on link in email**
3. [***Login***](http://rapport.dartmouth.edu/) ***to RAPPORT using your NetID and password***

<http://rapport.dartmouth.edu/>  **My NetID** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

To look up your NetID: <http://www.dartmouth.edu/comp/systems/netid.html>

To re-set your password: <https://dartdm.dartmouth.edu/dartDM/dartDM>

Your personal page opens when you click on "My Home":



"My Action Items" contains proposals needing your action.

Click on the title to be taken to the proposal workspace.

1. ***Click on link in email generated by RAPPORT:***

**From:** [no-reply@rapport.dartmouth.edu](mailto:no-reply@rapport.dartmouth.edu) [[mailto:no-reply@rapport.dartmouth.edu]](mailto:[mailto:no-reply@rapport.dartmouth.edu])   
**Sent:** Tuesday, June 26, 2012 1:12 PM  
**To:** Fiscal Officer  
**Subject:** RAPPORT Action Required

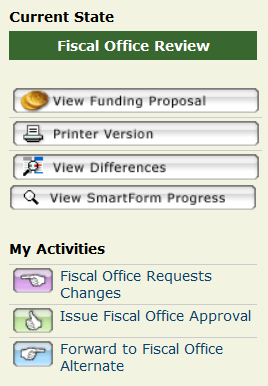
|  |  |
| --- | --- |
|  | The following proposal has been routed to you for your review:    "Cardiovascular Response to Zero Gravity"    The PI is Test PI1  Please click here FP000000XX **to review the Funding Proposal.**  The Principal Investigator for this Funding Proposal is Test PI.  The RAPPORT log-in page opens. Once logged in, the proposal workspace will open: |

**TO REVIEW THE PROPOSAL:**

The easiest way to view the proposal details is to right-click on

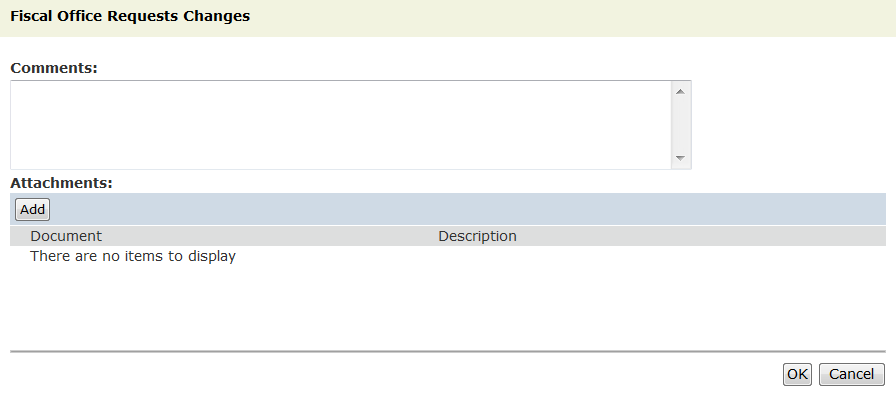
"Printer Version" and select "Open link in new window" to open all the views in a scrollable window.

**Three actions available to take for this proposal:**



1. Fiscal Office Requests Changes

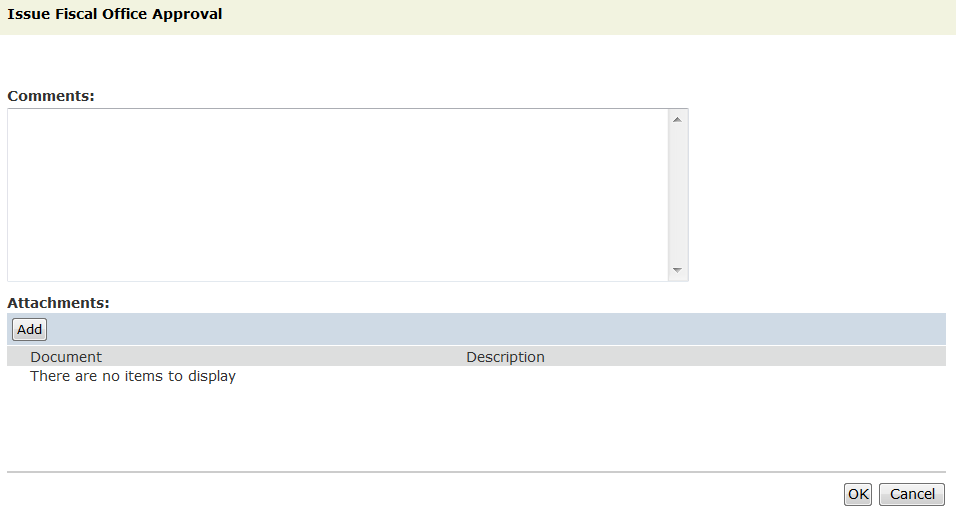
Clicking on this activity button brings up this pop up window:



"Fiscal Officer Requests Changes" will route the proposal back to the researchers so they can address the comments entered here.

1. Issue Fiscal Officer Approval 

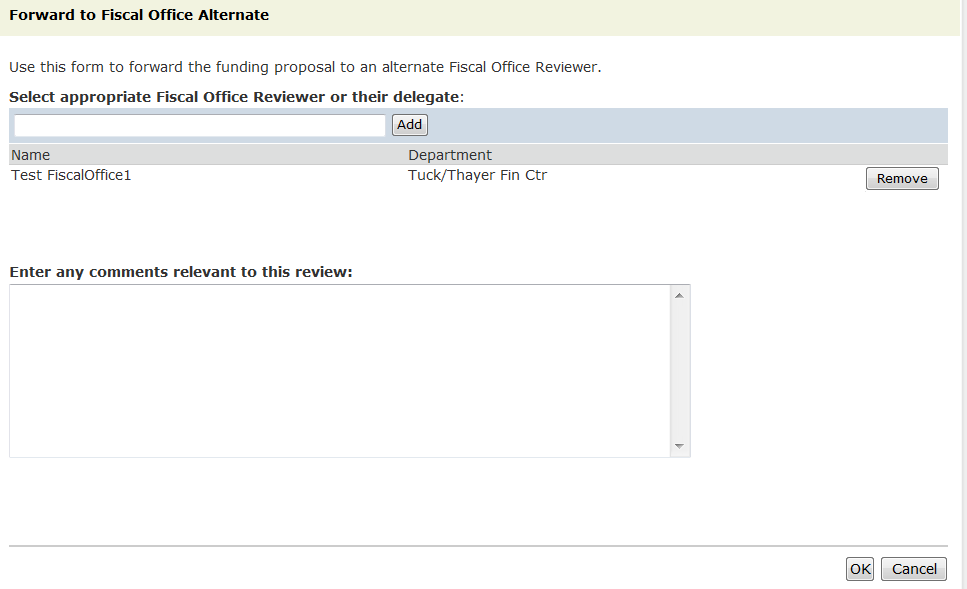
Clicking on this activity button brings up this pop up window:



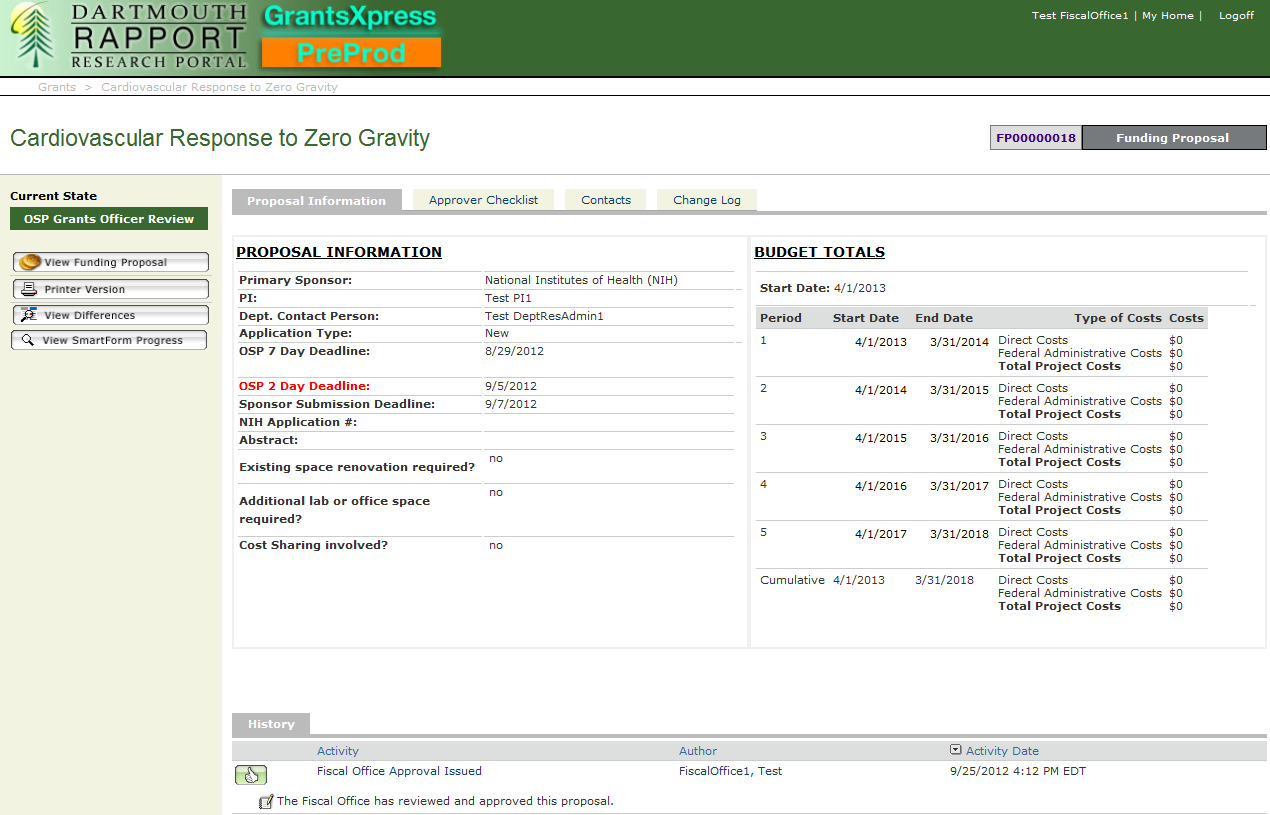
Though any comments added here are viewable by the researchers on this proposal, clicking on OK will indicate approval. Review will then be routed to OSP.

1. Forward to Fiscal Office Alternate 

Clicking on this activity button brings up this pop up window:



**Once the Fiscal Officer approves**, the state of the proposal will change from Fiscal Office Review to OSP Grants Officer Review:



This approval activity and any comments entered then appear in the History section at the bottom of the proposal workspace.

You have completed your part in the routing process. End.