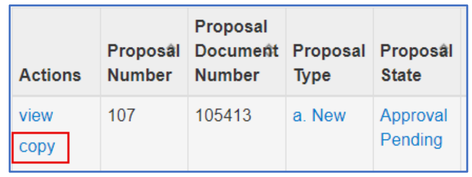
Kuali Research: Copying a Proposal

This document explains how to copy a Proposal in Kuali Research.

This process is helpful because if you have an existing proposal that has similar information for a new one, you won't have to create the new one from scratch. Additionally, if you have made an error on the **Lead Unit** field in an existing Proposal, this is the quickest and easiest way to correct it.

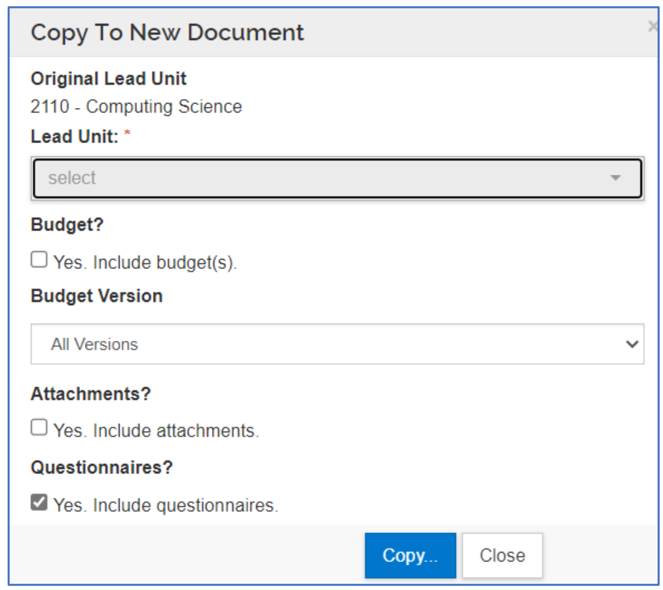
If you know the number of the proposal you want to copy, in the **Proposal Development** group, click **Search Proposals**, enter the proposal number, and click **Search**.

Alternatively, click **All My Proposals** and scroll to the proposal you are looking for. When you find the one you're looking for, in the left-hand menu, click **Copy**.



In the **Copy to New Document** dialog, complete the following:

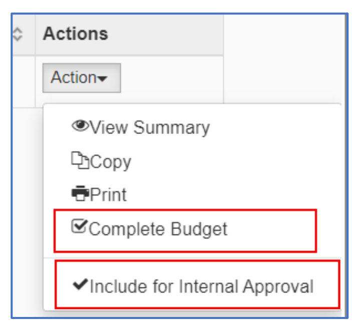
a) Enter the **Lead Unit**.
b) To include **Budget** documentation from your original proposal, click **Yes** and select the versions if applicable.
c) To include the **Attachments** from your original proposal, click **Yes**.
d) To include the **Questionnaire** data from your original proposal, leave the **Yes** box checked.
e) Click **Copy**.



The proposal now has a new number, and you can edit sections as needed:

- If you are creating a proposal on behalf of a PI, you can copy the proposal and, on the **Personnel** page, delete the current PI and add a new one.
- In the **Internal Sig Sheet Budget** section, you can edit the existing budget, or if the budget is the same, mark it as complete and mark it as included for approval. This is under the **Actions** menu:
  - Click **Complete Budget**
  - Click **Include for Internal Approval**.

  Once the budget line is green it means it's ready for the internal workflow approval. If the budget line is not green, an error will display when you submit the proposal.



- Review the **Questionnaire** section to ensure the answers are correct for new proposal.
- In the **Compliance** section, ensure the entry is correct and relevant; if not remove and add a new one.
- Review the **Attachments** for currency and relevance to the new proposal.

When the proposal is complete, go to the **Summary/Submit** tab and click **Submit for Review**.