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.