This job aid outlines the steps for copying an existing Proposal Development document. A proposal can be copied regardless of document status; users can copy proposals that are in progress, submitted to a sponsor, or have been disapproved.

**WHO:**
- College Administrator(s)
- Department Administrator(s)
- Principal Investigator(s)/Key Person(s)

**WHEN:**
- Selecting a different Lead Unit for a proposal
- Using the proposal as a template for future proposals or supplemental funding
- Modifying a proposal after submission for resubmission or change/corrected purposes

**HOW:**
1) From the main menu, select the Search Proposals option under the Proposals channel on the Researcher tab.

2) Enter search criteria in the Development Proposal Lookup.
3) Click Search at the bottom of the screen
4) Find the proposal you wish to copy; if you do not see it, return to step 2 and revise your search criteria.
5) Select Copy in the Actions Column

6) The system will open your proposal, displaying the Copy to New Document panel on the Proposal Actions tab.
7) You must select a **Lead Unit** for your new proposal from the drop down menu; beyond that, you may now indicate how much of the proposal to copy:
   a. **Check Budget?** to copy the budget from the original proposal; you may opt to copy only the final version by selecting that option from the drop-down menu
   b. **Check Attachments?** to copy the proposal, personnel, and internal attachments uploaded to the original proposal
   c. **Check Questionnaires?** to bring completed questionnaires from the original proposal (please note that only the questionnaires appearing on the Questions tab copy; Proposal Person Certification questions do not)

   **Notes:**
   1. The system will only copy data from the proposal tabs if the Budget?, Attachments? and Questionnaire? boxes are unchecked.
   2. The checkboxes will only be active if the original proposal includes data/documents to copy (Attachments, budget versions, questionnaires)

8) Copying an existing proposal can save time however, the following items will likely need to be updated in the copied proposal:
   - Project Start and End Dates
   - Key Personnel
   - Answers to Questionnaires
   - Budget Rates (F&A, Fringe, and Inflation)
   - Start and End Dates for budgeted personnel

9) Click the **copy proposal** button

10) The system will display the copied proposal in edit mode.