Copy Proposal

C-1. Using the Copy Proposal feature (v8.9)

Often it is possible to use an existing proposal in UD Financials to create a new proposal. Any proposal can be used in this manner to facilitate the creation of a new proposal.

The Copy Proposal page enables you to copy a proposal, any or all of its projects, associated budget periods from one proposal to another without reentering data. When you copy a proposal, the system automatically creates a new Proposal ID# and a new Project # for the copied proposal. If you have copied a proposal for the purpose of creating a new proposal, you must use the new proposal ID# and the new Proposal Project #s.

New in v8.9:
- Budget Periods are included in the copy feature where the dates can be changed
- The confusing All/No Projects and All/No Budgets buttons have been removed
- The Save button has been removed; the Copy button both copies and saves

Navigation:
- Go to UD Financials Menu Grants\Proposals\Copy Proposal
- At the Budget Line Summary page you will see Find an Existing Value

1. Enter Proposal ID, Sponsor ID, PI ID, Department ID, or other value in one of the boxes to search for the proposal you want to copy.
2. Click the Search button
3. Click on the desired Proposal ID from the Search Results list.
4. Check the “From” Proposal, Version ID, and Start/End Dates to ensure that it is the Proposal you wish to copy.
5. **To Proposal** – Leave it as “NEXT”, the system will auto number the new proposal when data is copied.
6. **To Version** – Leave it as “NEXT”
7. **To Start/End Dates** – accept dates or change them as needed
8. *New in 8.9 - Budget Period* – accept or change the new **To Start/End Dates**
9. If the proposal you are copying has multiple projects (this one has two), it is strongly suggested that you click **View All** to see all the projects at once.
10. **To Project ID** - Leave as “NEXT”
11. **Primary Project** - at least one project must be selected and designated as the “Primary Project”.
12. **To Budget ID** – defaults to 1, accept this
13. **Copy** button – click for the system to create a new proposal and project(s) from existing proposal data.

Note: The copy feature loads several fields in the new proposal that may need to be updated. One example might be changes in the **title** on both the Proposal and Project pages.

**IMPORTANT** - All fields following a copy should be reviewed closely to ensure they contain the desired values in the new proposal. One of the values to verify is the F&A data because the F&A rate from the original proposal copies to the new one.