

## Copy Proposal

### C-1. Using the Copy Proposal feature

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.

#### Navigation:

- Go to UD Financials **Main Menu**→ **Grants**→**Proposals**→**Copy Proposal**

ORACLE

Favorites | Main Menu > Grants > Proposals > Copy Proposal

### Copy Proposal

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Limit the number of results to (up to 300): 300

Business Unit: = UOD01

Proposal ID: begins with 12A0120

Version ID: begins with

PI ID: begins with

Sponsor ID: begins with

Type: =

Status: =

Department ID: begins with

Short Title: begins with

Template Proposal: begins with

Case Sensitive

**Search** Clear Basic Search Save Search Criteria

#### Search Results

View All First 1-13 of 13 Last

Business Unit	Proposal ID	Version ID	PI ID	Sponsor ID	Type	Status	Department ID	Short Title	Template Proposal
UOD01	12A01200	V101	23221	3079	New	Pendg Aprv	07355	PWP/OE NIDRR TRAINING MODULES	N
UOD01	12A01201	V101	701520978	0200	New	Pendg Aprv	03110	CU/NIH ACIDS KLOXIN	N
UOD01	12A01202	V101	32971	0728	New	Draft	03144	OWENS CRNG JWG FY12	N
UOD01	12A01203	V101	701382848	2000	New	Draft	02130	USDA NIFA OREI DELANEY 12	N
UOD01	12A01204	V101	701061629	0400	New	Draft	03140	NSF CPS TANNER 12	N
UOD01	12A01205	V101	22671	2527	New	Draft	02541	DNREC/NOAA LEATHERS	N
UOD01	12A01206	V101	19617	0700	New	Pendg Aprv	01551	DOE PHASE II TESTING	N
UOD01	12A01207	V101	32971	1206	New	Submitted	03144	TEST2 PROP PROCESS 9.1	N

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.

**Copy Proposal**

From Proposal: 12A01206 \*To Proposal: NEXT 5

From Version ID: V101 \*To Version: NEXT 6

From Start Date: 03/20/2013 To Start Date: 03/20/2013 7

From End Date: 03/19/2015 To End Date: 03/19/2015

Budget Period				
Budget Period	From Start Date	From End Date	To Start Date	To End Date
1	03/20/2013	03/19/2014	03/20/2013	03/19/2014
2	03/20/2014	03/19/2015	03/20/2014	03/19/2015

Project

From Project ID: 00000000014561 DOE PHASE II TESTING BLACK To Project ID: NEXT 9

Primary Project

Budget		
Copy	From Budget ID	To Budget ID
<input checked="" type="checkbox"/>	1	1

Copy

Return to Search Previous in List Next in List Notify

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. **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.

**Copy Proposal**

From Proposal: 12A01206 \*To Proposal: NEXT

From Version ID: V101 \*To Version: NEXT

From Start Date: 03/20/2013 To Start Date: 03/20/2013

From End Date: 03/19/2015 To End Date: 03/19/2015

Budget Period	From Start Date	From End Date	To Start Date	To End Date
1	03/20/2013	03/19/2014	03/20/2013	03/19/2014
2	03/20/2014	03/19/2015	03/20/2014	03/19/2015

**Project**

From Project ID: 000000000014561 DOE PHASE II TESTING BLACK To Project ID: NEXT

Primary Project

Copy	From Budget ID	To Budget ID
<input checked="" type="checkbox"/>	1	1

**Project**

From Project ID: 000000000014565 DOE PHASE II TESTING WHITE To Project ID: NEXT

Primary Project

Copy	From Budget ID	To Budget ID
<input checked="" type="checkbox"/>	1	1

**Copy**

Return to Search Previous in List Next in List Notify

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.