

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 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 group, click , enter the proposal number, and click .

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

In the dialog, complete the following:

- Enter the .
- To include documentation from your original proposal, click and select the versions if applicable.
- To include the from your original proposal, click .
- To include the data from your original proposal, leave the box checked.
- Click .

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 page, delete the current PI and add a new one.

In the 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 menu:

- Click .
- Click .

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 section to ensure the answers are correct for new proposal.

In the section, ensure the entry is correct and relevant; if not remove and add a new one.

Review the