This document is intended for the Proposal Team.

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Copy a Proposal

If you have completed a funding proposal and would like to begin working on a new one, you can do so by copying the existing proposal into a new document. This new version will be located in your Inbox.

Copy a Proposal

Warning: Do not execute this activity if you are submitting a Renewal, Resubmission or a Revision.

1. From any existing proposal, under My Current Actions, click Copy Proposal.
2. Type in the name of your new proposal.
3. Be sure to select No, for “Copy To My Templates”.
4. Click OK.
5. Once the proposal workspace refreshes, scroll down to the History tab and click the new funding proposal number (link).
6. The new proposal will appear as a Draft with many of the smart forms already completed.

NOTE: The SF424 application will NOT copy over and will need to be recreated.
Create a Template

Creating a template will allow an existing proposal to be used as a starting point for other proposals. It will appear under the My Templates tab in your Inbox. You can organize your proposal templates by PI, Sponsors, Due dates, etc.

1. Under Copy Proposal, name your new template and select Yes for “Copy To My Templates”.
2. Click OK and refer to step 5.
3. To create a new proposal from this template, click Copy Proposal and refer to steps 2-6.
4. To locate templates you’ve created, click the My Inbox hyperlink and then on the My Templates tab.
5. To create a new proposal from a template listed, select the desired template, click Copy Proposal and refer to steps 2-6.

Note: The template is only a starting point for other proposals to be created. While you will have the ability to edit information within the template, the PI will NOT be able to submit for review. A new proposal must be created first, referring to steps 2-6.