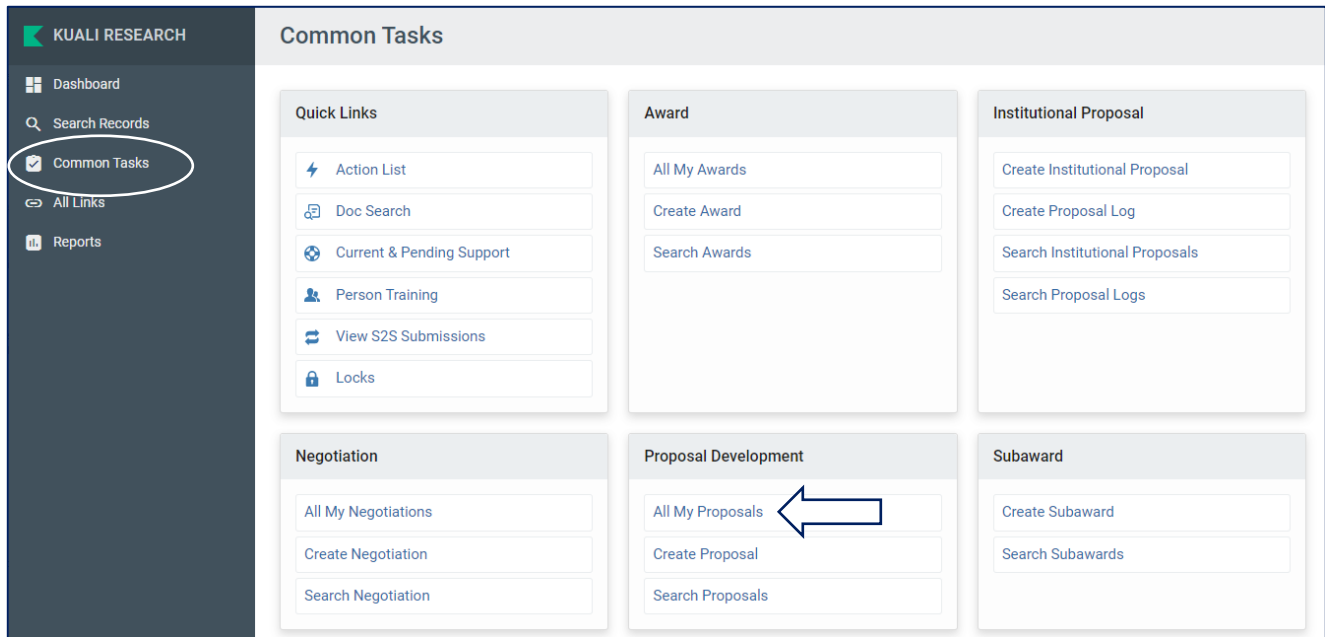


# Kuali Research

## How to Copy a Proposal

To copy a previously submitted proposal to re-use for another funding opportunity:

- Go to the **Common Tasks** screen.
- Select **All My Proposals** on the **Proposal Development** card.



- Scroll down and you will see a list of all your past proposals that have been created in Kuali.
- Once you have found the proposal you want to copy, click **copy** in the **Actions Column**.

The screenshot shows a table of proposals. The 'Show 10 entries' dropdown is highlighted with a red arrow. The 'copy' link in the 'Actions' column for the proposal with ID 519 is highlighted with a red arrow.

Actions	Proposal Number	Proposal Document Number	Proposal Type	Proposal State
<a href="#">view</a> <a href="#">copy</a> <a href="#">medusa</a>	110	11649	New	Cancelled
<a href="#">view</a> <a href="#">copy</a> <a href="#">medusa</a>	519	16191	New	Approved and Submitted

You may need to increase the number of entries showing (top left of table) to find the proposal you are looking for.

- When you click **copy**, the window below will pop up. Select the options desired for the new proposal and click the blue **Copy** button at the bottom.

Copy To New Document

Original Lead Unit  
0995 - Cell Biology & Physiology (CELL)

Lead Unit: \*

select

Budget?

Yes. Include budget(s).

Budget Version

All Versions

Attachments?

Yes. Include attachments.

Questionnaires?

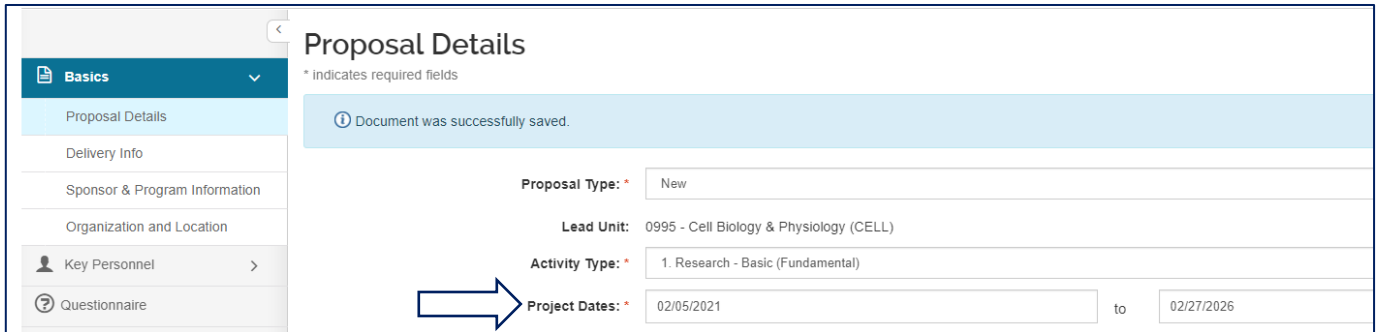
Yes. Include questionnaires.

Copy... Close

- The copied proposal will automatically open, and you can make the needed changes appropriate for the new solicitation.

## A few items to always do with a copied proposal:

- Update the **project start and end dates**.



The screenshot shows the 'Proposal Details' form. The 'Project Dates' field is highlighted with a blue arrow. The form includes a sidebar with 'Basics' selected, and a notification bar at the top stating 'Document was successfully saved.'

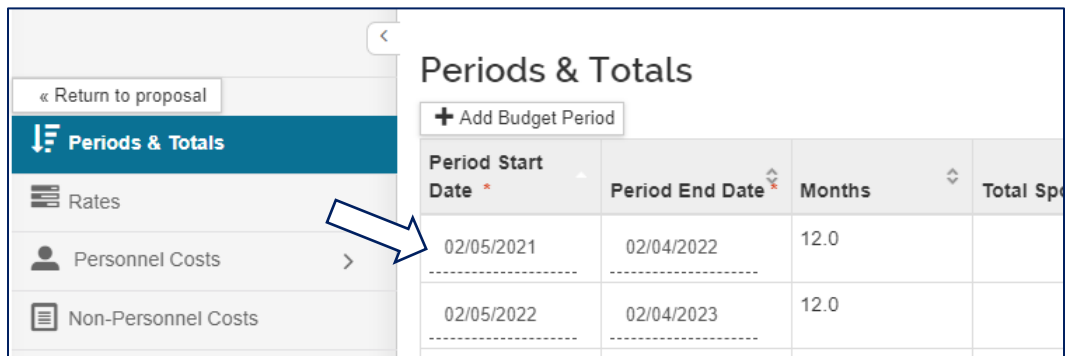
Proposal Type: \* New

Lead Unit: 0995 - Cell Biology & Physiology (CELL)

Activity Type: \* 1. Research - Basic (Fundamental)

Project Dates: \* 02/05/2021 to 02/27/2026


- If you copied the budget, update the **period start and end dates** under **Periods & Totals** in the budget.



The screenshot shows the 'Periods & Totals' table. A blue arrow points to the first row's start and end dates. The table has columns for Period Start Date, Period End Date, Months, and Total Sp.

Period Start Date *	Period End Date	Months	Total Sp
02/05/2021	02/04/2022	12.0	
02/05/2022	02/04/2023	12.0	

- **Sync the rates in the budget**
  - If you copied the budget from the previous proposal, open the budget and go to the **Rates** tab on the left.
  - Click the **Sync All Rates** button on the right hand side of the screen. This will update the Indirect Costs rate and Fringe Benefit rates to the current rates.



The screenshot shows the 'Rates' section with two buttons: 'Refresh All Rates' and 'Sync All Rates'. The 'Sync All Rates' button is circled in blue. Below these are two more buttons: 'Sync to Current Institutional Rates' and 'Reset to Default Rates'.