

Copy a Proposal to Create a New Proposal

This guide covers copying a proposal to create a new proposal. If you are starting a new project that includes many of the same attributes of one that is already associated with an existing proposal, you can copy the existing proposal, edit or remove the elements that are not needed, and create a new proposal without having to start from scratch. The new proposal can then easily be used to generate an award.

Step 1: Search for the Grant to Copy

1. Navigate to the Copy Proposal page using one of the options below:

Navigation Options	Navigation Path
Navigation Collection	Accounting, Grants Management, Manage Proposals, left menu, Copy Proposal.
WorkCenter	Accounting, Grants Management, Grants WorkCenter, left menu, Links section, Create New Award, Copy Proposal.

2. At the Copy Proposal page, verify the Business Unit and enter the Proposal ID for the proposal you want to copy.
3. Select the **Search** button.

The screenshot shows the 'Copy Proposal' page with a sidebar on the left containing navigation options: 'Maintain Proposal', 'Copy Proposal' (highlighted), 'Enter Budget Detail', and 'Submit Proposal'. The main content area is titled 'Copy Proposal' and 'Find an Existing Value'. Under 'Search Criteria', there is a prompt: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a 'Recent Searches' section with a dropdown menu. The search criteria form includes several fields:

- 'Business Unit' with a dropdown arrow and the value 'H6502'.
- 'Proposal ID' with a dropdown arrow set to 'begins with' and the value 'H65231477'.
- 'Version ID' with a dropdown arrow set to 'begins with'.
- 'PI ID' with a dropdown arrow set to 'begins with'.
- 'Sponsor ID' with a dropdown arrow set to 'begins with'.
- 'Type' with a dropdown arrow set to '*'.
- 'Status' with a dropdown arrow set to '*'.
- 'Department ID' with a dropdown arrow set to 'begins with'.
- 'Short Title' with a dropdown arrow set to 'begins with'.
- 'Template Proposal' with a dropdown arrow set to 'begins with'.

 At the bottom of the search criteria section, there is a checkbox for 'Case Sensitive' and a 'Search' button (highlighted with a red box) and a 'Clear' button.

- If necessary, select the proposal you want to copy in the **Search Results** listing. The Copy Proposal page displays.

Copy Proposal

From Proposal H550000035	*To Proposal <input type="text" value="NEXT"/>
From Version ID V101	To Version NEXT
From Start Date 07/01/2009	To Start Date <input type="text" value="07/01/2009"/>
From End Date 12/31/2011	To End Date 12/31/2011

Budget Period

Budget Period	From Start Date	From End Date	To Start Date	To End Date
1	07/01/2009	12/31/2011	<input type="text" value="07/01/2009"/>	<input type="text" value="12/31/2011"/>

Project

From Project ID H55091477 Adoption Incentive Payment To Project ID

Primary Project

Budget

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

Step 2: Complete the Copy Proposal Page

Use the Copy Proposal page to enter basic information for the new proposal, including the Proposal ID, Start and End Dates, and Project ID.

- Complete the Copy Proposal page **header** and **Budget Period** information as described below.

WARNING! The Start and End Dates and Budget Dates are very important because they will become the start and end dates of the project, award, and contract. The Start Date also impacts the initial Project Status Effective Date which affects payroll processing and cannot be changed once the award is generated.

Field Name	Field Description
*To Proposal	Enter your own Proposal ID or leave the default of "NEXT" in the Proposal ID field and SWIFT will automatically assign a system-generated ID after you save the Proposal.

Field Name	Field Description
*To Start Date	Enter the Start Date for the new project, award and contract. SWIFT assumes that the new proposal will have the same duration as the one you are copying. The Proposal End Date will be updated automatically to the new date, along with the Budget Period start and end dates.
Budget Period To Start Date and To End Date	The Budget Period start and end dates are automatically updated to be the same as the new Proposal start and end dates. You can manually change these dates. If you change the To End Date field for the Budget Period, the To End Date for the Proposal in the header will be updated to match. Changing the To Start Date for the Budget Period does not update the To Start Date for the Proposal.

Copy Proposal

From Proposal H550000035

From Version ID V101

From Start Date 07/01/2009

From End Date 12/31/2011

Budget Period

Budget Period	From Start Date	From End Date	To Start Date	To End Date
1	07/01/2009	12/31/2011	<input type="text" value="07/01/2023"/> <input type="button" value="Calendar"/>	<input type="text" value="06/30/2024"/> <input type="button" value="Calendar"/>

2. Complete the **Project** and **Budget** (Activity) information as described below.

Field Name	Field Description
*From Project ID	Uncheck the From Project ID box, if you do not want to copy this project to the new proposal.
*Primary Project	This box should be checked if the Project ID is the Primary Project or if your proposal will only have one project. Check or uncheck the box as appropriate.
*To Project ID	You must overwrite the default system value "NEXT" with a new valid Project ID. The Project ID must begin with the first three digits of your Business Unit (your Agency Mask). For example, if your Business Unit is "G1001", your agency mask is "G10". Check with your agency for additional format requirements for the Project ID. If you forget to overwrite the Project ID, you will receive a message advising you that the Project ID already exists. You must select the Cancel button to return to the page and update the To Project ID as described above. Project ID is a 15-character alphanumeric identifier.
*Budget Copy	Check this box if you want the budget (Activity) to be copied.
*To Budget ID	Overwrite the Budget ID, if desired.

1. After reviewing your entries, select the **Copy** button. If there are no errors detected, the fields can no longer be edited and the **Copy** button is grayed out.

Project

From Project ID H55091477 Adoption Incentive Payment
 Primary Project

To Project ID H5524091477

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

Note: If you forgot to overwrite the Project ID, you will receive a message advising you that the Project ID already exists. You must select the **Cancel** button to return to the page and update the To Project ID as described above.

This Project ID, H55181407, already exists in Projects. (9395,901)

The Project ID selected already exists in Projects. Therefore, it cannot be moved into Projects by the "Generate" process.

Click "OK" to continue the copy process using the provided default "NEXT" functionality.

Click "Cancel" to terminate the copy process without copying.

OK Cancel

Step 3: Complete the Proposal

You'll need to navigate to the new proposal and make any changes that are necessary.

1. Navigate to the Maintain Proposal page using one of the options below:

Navigation Options	Navigation Path
Navigation Collection	Accounting, Grants Management, Manage Proposals. The Maintain Proposals page displays by default.
WorkCenter	Accounting, Grants Management, Grants WorkCenter, left-menu, Links section, Create New Award, Maintain Proposal.

2. At the Maintain Proposal page, verify the Business Unit and enter the new Proposal ID. **Note:** Default search criteria may be supplied. You'll need to overwrite the Status entry of "Awarded" to "Draft" or clear that criteria.

3. Select the **Search** button.

Find an Existing Value

Search Criteria

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

Recent: Choose from recent searches [dropdown] [edit] [saved]

Searches

*Business Unit = [dropdown] H5502 [search]

Proposal ID begins with [dropdown] H5524 [search]

Version ID begins with [dropdown] [search]

PI ID begins with [dropdown] [search]

Sponsor ID begins with [dropdown] [search]

Type = [dropdown] [dropdown]

Status = [dropdown] [dropdown]

Department ID begins with [dropdown] [search]

Short Title begins with [dropdown] [search]

Template Proposal begins with [dropdown] [search]

^ Show fewer options

Case Sensitive

Search [Clear]

4. If necessary, select the Proposal ID in the **Search Results** section. The Maintain Proposal page displays.
5. Follow the instructions contained in the “[Enter Grant Proposals](#)” guide to review and update the copied proposal entries as necessary, and finish processing the proposal.

WARNING! Double check your Project Start and End Dates.

Proposal | Projects | Budgets | Resources | Certifications | Reports | Attachments

Proposal ID: H552400035 | Version ID: V101

Description: Adoption Incentive P* | Currency: USD | Add to My Proposals

Reference Award Number: | Federal Award Identification Number: |

*Title: Adoption Incentive Payment

Long Description: [text area]

*PI ID: 01181159 | Nguyen, Linh T

*Sponsor ID: GAH5505008 | US Dept of Health & Human Svcs LOC V162

Pre-Award Administrator: [search]

Purpose: [search]

*Proposal Type: New

Confidence %: [input]

CFDA: 93.603

Status: *Proposal Status: Draft | Submit Status: Not Submitted | Generate Status: Not Generated | In Approval Process

Facilities & Admin Required
 Foreign Application/Component
 NIH Modular Grant

Budget Periods: *Start Date: 07/01/2023 | *End Date: 06/30/2024 | No. Periods: [input] | Build Periods

Period	*Start Date	*End Date	Previous End Date	Next End Date	Target Sponsor Budget
1	07/01/2023	06/30/2024			

Target Sponsor Budget: [input]

Go To: Location | Protocol | Component | Setup Level | Keywords | Gender & Minority Study | Trainee | Attributes

Return To: My Proposals

[Save] [Return to Search] [Previous in List] [Next in List] [Notify] [Refresh] [Add] [Update/Display]