

## QUICK REFERENCE GUIDE

November 1, 2019

### 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.

Steps to complete:

- Step 1: Search for the Grant to Copy
- Step 2: Complete the Copy Proposal Page
- Step 3: Complete the Proposal as you would normally

#### Step 1: Search for the Grant to Copy

Begin by searching for the grant you want to copy.

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

Navigation Options	Navigation Path
<b>Navigation Collection</b>	Accounting, Grants Management, Manage Proposals, left-menu, Copy Proposal.
<b>WorkCenter</b>	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.

**Copy Proposal**

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

[Find an Existing Value](#)

**Search Criteria**

Business Unit =

Proposal ID begins with

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

[Basic Search](#)

3. Click on the **Search** button.
4. If necessary, click on the proposal you want to copy in the **Search Results** listing. The *Copy Proposal* page displays.

**Copy Proposal**

From Proposal R320000121      \*To Proposal

From Version ID V101      To Version NEXT

From Start Date 10/01/2017      To Start Date

From End Date 09/30/2018      To End Date 09/30/2018

**Budget Period**

Budget Period	From Start Date	From End Date	To Start Date	To End Date
1	10/01/2017	09/30/2018	<input type="text" value="10/01/2017"/>	<input type="text" value="09/30/2018"/>

**Project**

From Project ID R32GT000000121      Water Quality Management Planning Clean Water Act 604(b)      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*.

1. 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
<b>*To Proposal</b>	Enter your own <i>Proposal ID</i> or leave the default of "NEXT" in the <i>Proposal ID</i> field and SWIFT will automatically assign a system-generated ID after you save the Proposal.
<b>*To Start Date</b>	Enter the <i>Start Date</i> 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 <i>Proposal End Date</i> will be updated automatically to the new date, along with the <i>Budget Period</i> start and end dates.

Field Name	Field Description
<b>Budget Period To Start Date and To End Date</b>	The <i>Budget Period</i> 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 <i>To End Date</i> field for the <i>Budget Period</i> , the <i>To End Date</i> for the Proposal in the header will be updated to match. Changing the <i>To Start Date</i> for the <i>Budget Period</i> does not update the <i>To Start Date</i> for the Proposal.

**Copy Proposal**

From Proposal R320000121      \*To Proposal

From Version ID V101      To Version NEXT

From Start Date 10/01/2017      To Start Date

From End Date 09/30/2018      To End Date 09/30/2019

**Budget Period**

Budget Period	From Start Date	From End Date	To Start Date	To End Date
1	10/01/2017	09/30/2018	<input type="text" value="10/01/2018"/>	<input type="text" value="09/30/2019"/>

**Project**

From Project ID R32GT0000000121      Water Quality Management Planning Clean Water Act 604(b)      To Project ID

Primary Project

**Budget**

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

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

Field Name	Field Description
<b>*From Project ID</b>	Uncheck the <i>From Project ID</i> box, if you do not want to copy this project to the new proposal.
<b>*Primary Project</b>	This box should be checked if the <i>Project ID</i> is the <i>Primary Project</i> or if your proposal will only have one project. Check or uncheck the box as appropriate.

Field Name	Field Description
<b>*To Project ID</b>	<p>You must overwrite the default system value “NEXT” with a new valid <i>Project ID</i>. The <i>Project ID</i> 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 <i>Project ID</i>.</p> <p>If you forget to overwrite the <i>Project ID</i>, you will receive a message advising you that the <i>Project ID</i> already exists. You must click on the <b>Cancel</b> button to return to the page and update the <i>To Project ID</i> as described above.</p> <p><i>Project ID</i> is a 15-character alphanumeric identifier.</p>
<b>*Budget Copy</b>	Check this box if you want the budget (Activity) to be copied.
<b>*To Budget ID</b>	Overwrite the <i>Budget ID</i> , if desired.

**Copy Proposal**

From Proposal R320000121      \*To Proposal

From Version ID V101      To Version NEXT

From Start Date 10/01/2017      To Start Date

From End Date 09/30/2018      To End Date 09/30/2019

**Budget Period**

Budget Period	From Start Date	From End Date	To Start Date	To End Date
1	10/01/2017	09/30/2018	<input style="border: 1px solid red;" type="text" value="10/01/2018"/>	<input style="border: 1px solid red;" type="text" value="09/30/2019"/>

**Project**

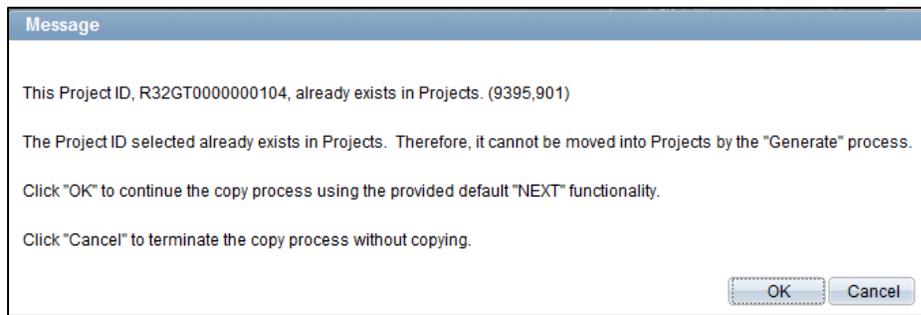
From Project ID R32GT0000000121      Water Quality Management Planning Clean      To Project ID

Primary Project      Water Act 604(b)

**Budget**

Copy	From Budget ID	To Budget ID
<input checked="" style="border: 1px solid red;" type="checkbox"/>	1	<input style="border: 1px solid red;" type="text" value="1"/>

- After reviewing your entries, click on the **Copy** button. If there are no errors detected, the fields can no longer be edited and the **Copy** button is grayed out.
  - If you forgot to overwrite the *Project ID*, you will receive a message advising you that the *Project ID* already exists. You must click on the **Cancel** button to return to the page and update the *To Project ID* as described above.



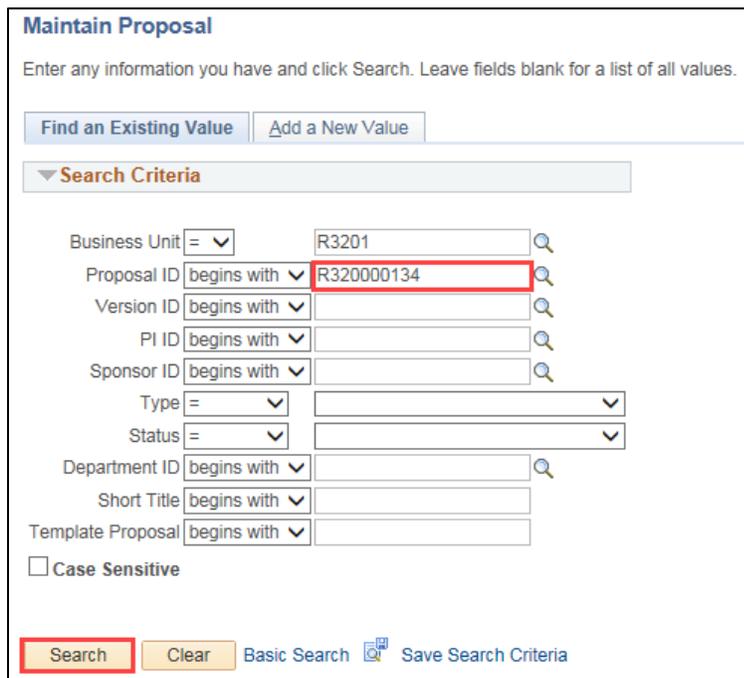
### Step 3: Complete the Proposal as you would normally

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
<b>Navigation Collection</b>	Accounting, Grants Management, Manage Proposals. The Maintain Proposals page displays by default.
<b>WorkCenter</b>	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. Click on the **Search** button.

- If necessary, click on the *Proposal ID* in the **Search Results** section. The *Maintain Proposal* page displays.

Proposal
Projects
Budgets
Resources
Certifications
Reports
Attachments

Proposal ID R320000134

Description CWA 604(B)

Reference Award Number

Version ID V101

Currency USD Add to My Proposals

Federal Award Identification Number

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\*Title

Long Description  198 characters remaining

\*PI ID  O'Hara, Kelly G

\*Sponsor ID  US Environmental Protection Agency

Pre-Award Administrator

Purpose

\*Proposal Type  New

Confidence %

CFDA

**Status**

\*Proposal Status  Draft

Submit Status: Not Submitted

Generate Status: Not Generated

In Approval Process

Facilities & Admin Requested

Foreign Application/Component

NIH Modular Grant

Due By
Budget Express
Additional Information

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\*Start Date

\*End Date

No. Periods

Build Periods

**Budget Periods** Personalize | Find |  |  |

Details
PHS Incomes

Period	*Start Date	*End Date	Previous End Date	Next End Date	Target Sponsor Budget
1	<input type="text" value="10/01/2018"/>	<input type="text" value="09/30/2019"/>	◀	▶	267,725.00 <span style="font-size: x-small;">+ -</span>

- 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.