

**Research Administration &
Proposal Submission System (RAPSS)
Copy Proposal/Create Template
Quick Reference**

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.

The screenshot illustrates the steps to copy a proposal. On the left, the 'My Current Actions' menu has 'Copy Proposal' highlighted with a red arrow labeled '1'. The 'Copy Proposal' dialog box is open, showing 'New Proposal Name' as 'New Proposal' (arrow '2'), 'Copy To My Templates?' set to 'No' (arrow '3'), and 'OK' and 'Cancel' buttons (arrow '4'). Below the dialog, the 'History' tab shows a list of activities, with 'New Copy: FP00000472' highlighted and a mouse cursor pointing to it (arrow '5'). At the bottom, the 'New Proposal' workspace is shown with the 'Draft' state and various tabs like 'Project Information', 'SF424 Summary', etc. (arrow '6').

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.

Copy Proposal

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

Execution of this activity will copy this funding proposal and place a "New" version in your inbox.

New Proposal Name:

Copy To My Templates¹: Yes No

Use Background Processing:

¹ This will allow this proposal to be used as a starting point for other proposals. It will appear under the My Templates tab in your personal folder.

Please note that this activity will take some time.



Current State

- Template
- Edit Funding Proposal
- Printer Version
- View Differences
- View SmartForm Progress
- New Document Review

My Current Actions

- Manage Proposal Security
- Add Attachments
- Email Proposal Team
- Email Department Reviewer
- Add Comment
- Email Specialist
- Copy Proposal

search Administration & Proposal Submission System

Jamie Carr | My Inbox | Projects | Logout

Grants Awards Agreements Reports

Page for Jamie Carr

As a member of the Proposal Team (either the PI or administrative staff), you have the ability to initiate, prepare and submit applications for internal review. Once the proposal has been initiated, you also have the ability to delegate access to the application to other individuals.

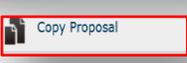
- My Inbox:** Items that currently require your action.

This is not the same as your email inbox.

My Inbox - Proposals | My Inbox - Awards | My Inbox - Agreements | **My Templates**

Filter by ID

ID	Name	Primary Sponsor	PI Last Name	PI First Name	Dept	Parent Organization	Submitting Department
FP00000474	NSF	TBD (Industry)	McCamery	Rosetta	Office of Research and Sponsored Programs	Central Administration and Finance	
FP00000473	NIH	TBD (Industry)	McCamery	Rosetta	Office of Research and Sponsored Programs	Central Administration and Finance	



Create a Template

- Under Copy Proposal, name your new template and select **Yes** for “Copy To My Templates”.
- Click **OK** and refer to step 5.
- The current state of this proposal will appear as a **Template**.
- To create a new proposal from this template, click **Copy Proposal** and refer to steps 2-6.
- To locate templates you’ve created, click the **My Inbox** hyperlink and then on the **My Templates** tab.
- 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.