

Proposals must be completed and routed seven (7) business days before the deadline for OSP to submit the proposal.

## Copying Proposals

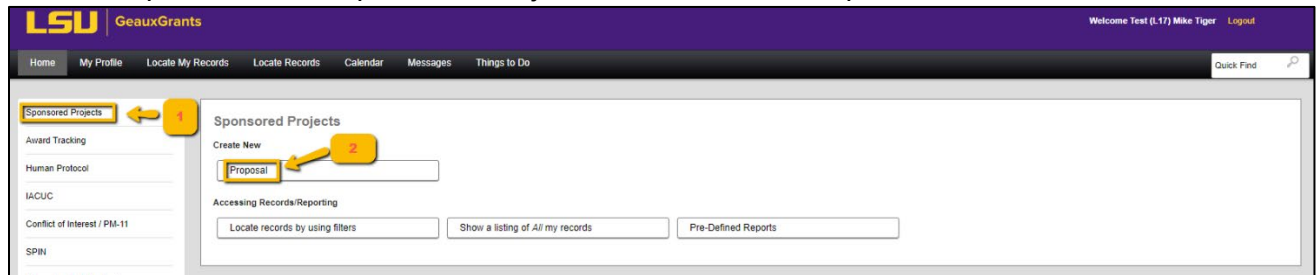
OSP recommends copying only when the following situations exist:

- Same principal investigator and sponsor
- Original proposal is in the same fiscal year and uses the same rates
- Original proposal used the same submission mechanism (i.e. S2S versus manual)

## How to Copy a Proposal Development (PD) Record

It is recommended that you use Chrome or Firefox for GeauxGrants. Login through myLSU.

- Step 1: From the home screen, select “Sponsored Projects” on the left hand navigation tabs.
- Step 2: From the Sponsored Projects screen, select “Proposal” under Create New



### Helpful tips for Copying a Proposal

- Know the proposal number for the record that you are requesting to copy your proposal from.
- The New Proposal Questionnaire consists of several steps (Steps 0-7)
- To go back a step, click Back on top right.
- All search fields are progressive text.
- Hit Done button on top left to close out the proposal instead of closing browser using X on top right.

## New Proposal Questionnaire – Creating Child Submission

- Step 0: Defaults to user. Change to the Principal Investigator (PI) by clicking Change. Type last name, first name of PI and click Select.
- Step 1: Click on “Copy From Existing Proposal” and click Continue.

New Proposal Questionnaire

Step 0: Confirm you intend for the PI of this proposal to be

Tiger, (L17) Mike the Change

Step 1: Create a "New" Proposal or "Copy From Existing?"

Continue

Create a New Proposal  
Copy From Existing Proposal

- Step 1 Continued: Enter Proposal number in box. Make sure to use the most recent submission (transaction) if more than one submission exists (e.g. AM240052-01). If you use the browse function, results appear at the bottom of the screen. Only check “Include all Proposal Attachments” if you are reusing the attachments. Click Continue.

New Proposal Questionnaire

Step 0: Confirm you intend for the PI of this proposal to be

Tiger, (L17) Mike the

Step 1: "New" or "Copy From Existing?"

Copy from Existing Proposal

Step 1: Continued

AM240052 Browse

Include all Proposal Attachments

Continue

- The PI in Step 1 will automatically change once you copy the proposal. If you had not updated the PI in Step 0, then you will get this warning message. Click OK.

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The PI of this record has been changed to reflect the PI of the copied from proposal.

Use the "Change PI" feature on the Budget Periods and Setups tab in the Budget section of the proposal or on the SF424RR face page tab if you need to change the PI of this proposal to a different person.

OK

- Step 2: Choose Proposal Type that applies to your proposal. Click Continue.

**New Proposal Questionnaire** Back

Step 0: *Confirm you intend for the PI of this proposal to be* Tiger, (L17) Mike the

Step 1: *"New" or "Copy From Existing"?* Copy from Existing Proposal

Step 1: *Continued* Copy from Proposal AM240052 - Test for 772

Step 2: *Please Select a Proposal Type*

Continue

New

New

Continuation-New

Continuation-Noncompeting

Revision

Renewal

Supplement

Resubmission

Notice/Letter of Intent

Pre-proposal

Modification/Prior Approval Request

Other Miscellaneous Agreements

- Step 3 and 4: Auto populates
- Step 5: Copy proposal title from Step 1: Continued or enter new title. Click Continue.

**New Proposal Questionnaire** Back

Step 0: *Confirm you intend for the PI of this proposal to be* Tiger, (L17) Mike the

Step 1: *"New" or "Copy From Existing"?* Copy from Existing Proposal

Step 1: *Continued* Copy from Proposal AM240052 - Test for 772

Step 2: *Proposal Type* New

Step 3: *Selected Sponsor* Timken Company

Step 4: *"Tracking" Number or "Proposal" Number* This proposal will be automatically numbered.

Step 5: *Proposal's Title*

Test for 772

Continue

- Steps 6-7: Auto Populate
- Click Create Proposal.

**New Proposal Questionnaire** Back

Step 0: *Confirm you intend for the PI of this proposal to be* Tiger, (L17) Mike the

Step 1: *"New" or "Copy From Existing"?* Copy from Existing Proposal

Step 1: *Continued* Copy from Proposal AM240052 - Test for 772

Step 2: *Proposal Type* New

Step 3: *Selected Sponsor* Timken Company

Step 4: *"Tracking" Number or "Proposal" Number* This proposal will be automatically numbered.

Step 5: *Proposal's Title* Test for 772

Step 6: *Project Start and End Dates* 08-Nov-2023 to 27-Mar-2024

Step 7: *Number of Budget Periods* 1

Is all of the above information correct?

\*NOTE: Clicking "Create Proposal" will create a new proposal with the properties you have indicated above. There is one final screen of questions to be completed before you can start entering your new proposal. Again, you will be able to change the properties of the proposal once it has been created if need be.

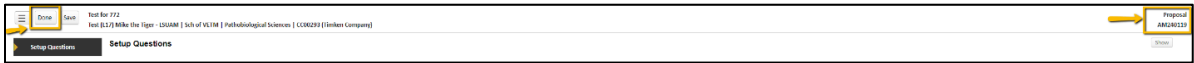
Step back through responses Create Proposal

## Setup Questions

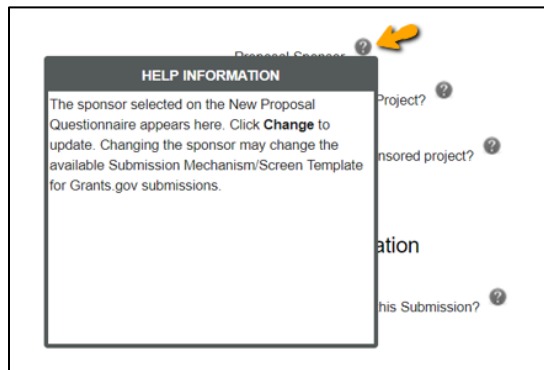
- This tab gathers general information about your proposal. After you complete this section, additional proposal tabs will appear to the left of the screen.



**Click Done on top left to close out the proposal. Do not close browser using X on top right.**



**Hover your mouse over ? icons to see instructions or definitions.**



All tabs and information from the previous GeauxGrants proposal you copied will appear.

## LSU Questionnaire, Budget, Personnel, Internal Uploads & Routing tabs

Depending on this type of proposal, follow instructions in the [Creating Manual Proposal](#), [Creating Grants.gov](#), or [NIH Grants.gov](#) How to guides.

- Please review the full record and update as necessary based on the proposal.
- Some of the most common items you will need to update prior to routing to OSP are:
  - LSU Questionnaire
  - [Update Budget dates for new proposal](#)
  - Salary Appointment Refresh if investigator salaries have changed since original proposal.
    1. On the Budget Detail screen for the PI - Click the Appointments tab

Budget Detail for: Tiger, (L17) Mike

Detail **Appointments** Justifications Cost Sharing Effort Periods Save and Close Save Close

Costs by Budget Period Show Calculation Details

PERIOD	ROLE	BASE SALARY	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL	MANUAL*
1	PD/PI	75,000	0.00	0.00	0.00	0	Employee 0	\$ 0	<input type="checkbox"/>
2	PD/PI	75,000	0.00	0.00	0.00	0	Employee 0	0	<input type="checkbox"/>
3	PD/PI	75,000	0.00	0.00	0.00	0	Employee 0	0	<input type="checkbox"/>
<b>Total</b>						<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	

Leave the base salary field blank in submission PDFs/XML \*\*Click Save to calculate salary and fringe benefits. This is required because appointment data is being used.  
\*Increments marked manual will ignore defined appointments for purposes of calculations.

2. Hit the refresh from profile button to pull the new salary information.

Budget Detail for: Tiger, (L17) Mike

Detail **Appointments** Justifications Cost Sharing Effort Periods Save and Close Save Close

Salary/Payroll Information Refresh From Profile Add Appointment

APPOINTMENT	APPOINTMENT START/END	BASE SALARY	FRINGE BENEFITS	NET SALARY	DELETE
Type: Calendar Months: 12 Continue <input checked="" type="radio"/> Recycle <input type="radio"/> Annual Inflation <input type="text"/>	S: 01-Jan-2019 E: 31-Dec-2019	75,000 Per Appt	Employee Amount: 33,000	108,000	
<b>Total:</b>				<b>108,000</b>	

Apply inflation on the Primary Appointment Anniversary Date

3. On the dialog box that pops up click OK.

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Do you want to restore appointment information from profile?

- The profile is now refreshed. If the salary was updated it would be reflected here now.

Budget Detail for: Tiger, (L17) Mike

Detail **Appointments** Justifications Cost Sharing Effort Periods Save and Close Save Close

Salary/Payroll Information Refresh From Profile Add Appointment

APPOINTMENT	APPOINTMENT START/END	BASE SALARY	FRINGE BENEFITS	NET SALARY	DELETE
Type: <input type="text" value="Calendar"/> Months: <input type="text" value="12"/>	S: <input type="text" value="01-Jan-2019"/> E: <input type="text" value="31-Dec-2019"/>	<input type="text" value="75,000"/> Per Appt	<input type="text" value="Employee"/> Amount: <input type="text" value="33,000"/>	108,000	
Continue <input checked="" type="radio"/> Recycle <input type="radio"/> End <input type="radio"/>	Annual Inflation <input type="text"/>			<b>Total:</b> 108,000	

Apply inflation on the Primary Appointment Anniversary Date