

Clone a PAF

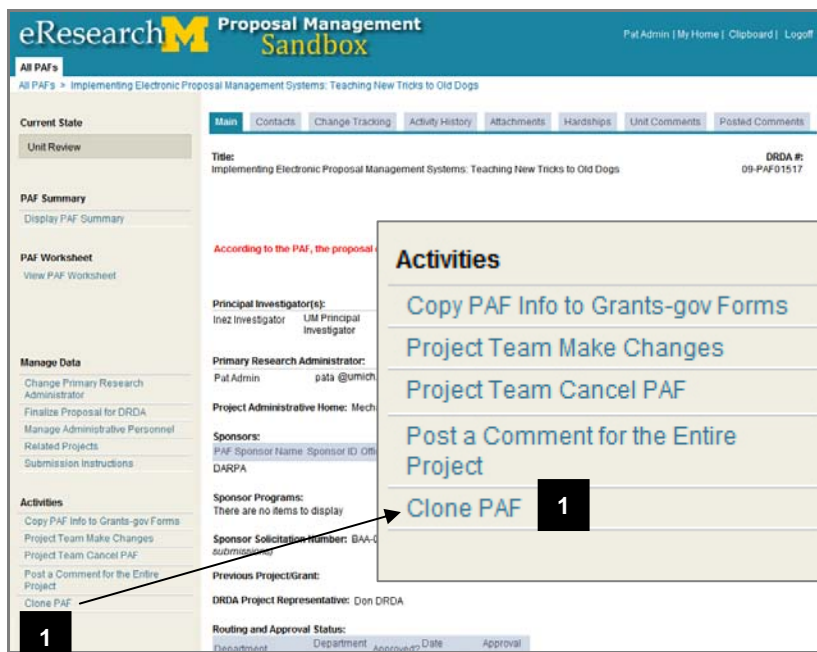
This procedure details how to make a clone (copy) of a PAF Worksheet. Before you begin, you need to locate the PAF you want to clone.

Who Can Clone: You can only clone PAFs that you are listed on as key or administrative personnel with edit rights.

Important Information

- A PAF can be cloned from any state, e.g., Proposal Preparation, Unit Review, DRDA Review, Cancelled, etc.
- Cloning a PAF automatically relates the clone (child) & original (parent) PAFs unless you select **New** as the cloning type. See the Related PAFs procedure for more information.
- When a PAF is cloned, the copy of the PAF:
 - Contains some, *but not all*, data from the PAF Worksheet.
 - Does not include from the original PAF attached documents & PI signatures of PAF/Conflict of Interest statement.
- A cloned PAF (child) cannot be accessed from the original (parent). Go to your Home Workspace to find your clone. It will have state of Proposal Preparation.

PAF Workspace



1. Click the **Clone PAF** activity from the **PAF Workspace**.

Clone PAF Window

Clone PAF
Grape Kool-Aid Too (09-PAF00435)

* Please enter the name for the new PAF: **2**

3 * Please select the cloning type:

<input type="radio"/> New	An application that is being submitted for the first time to a particular sponsor.
<input type="radio"/> Full Proposal (Pre-Proposal Use Only)	An application that is being submitted in response to a sponsor invitation following submission and review of a pre-proposal/pre-application to the sponsor.
<input type="radio"/> Increment	An application submitted to sponsor in order to receive continuation of funding. This does not undergo a competitive review process from the sponsor but does require a new PAF.
<input type="radio"/> Project (Umbrella Agreement Use Only)	An application submitted to a sponsor that fits under an Umbrella Agreement. Must have an existing umbrella agreement to choose this option.
<input type="radio"/> (Competitive) Continuation/Renewal	An application for sponsor consideration to continue a currently active or previously funded project (by that same sponsor). Example: Sponsor awarded funding for a five-year project. PI wishes to apply for funding to continue funding for an additional five years. This second application would be considered a Continuation or Renewal.
<input type="radio"/> Resubmission	An application that is being revised and submitted again for review by the same sponsor, typically altered in response to reviewer critiques of a previous submission of the application. Implies the sponsor made a final decision not to fund the previous version.
<input type="radio"/> Supplement	An application for additional funding to supplement a currently funded project (same sponsor). The request may cover additional work or simply increased costs of the existing project.

Clear **4** OK Cancel

2. Enter the name for the new PAF.

Important!

Cloning a PAF automatically relates the clone (child) & original (parent) PAFs unless you select **New** as the cloning type.

3. Select the cloning type, your options include:

- **New** An application that is being submitted for the first time to a particular sponsor.
- **Full Proposal (Pre-Proposal Use Only)** An application that is being submitted in response to a sponsor invitation following submission and review of a pre-proposal/pre-application to the sponsor.
- **Increment** An application submitted to sponsor in order to receive continuation of funding. This does not undergo a competitive review process from the sponsor but does require a new PAF.
- **Project (Umbrella Agreement Use Only)** An application submitted to a sponsor that fits under an Umbrella Agreement. Must have an existing umbrella agreement to choose this option.
- **(Competitive) Renewal/Continuation** An application for sponsor consideration to continue a currently active or previously funded project (by that same sponsor). Example: Sponsor awarded funding for a five-year project. PI wishes to apply for funding to continue funding for an additional five years. This second application would be considered a Continuation or Renewal
- **Resubmission** An application that is being revised and submitted again for review by the same sponsor, typically altered in response to reviewer critiques of a previous submission of the application. Implies the sponsor made a final decision not to fund the previous version.
- **Supplement** An application for additional funding to supplement a currently funded project (same sponsor). The request may cover additional work or simply increased costs of the existing project.

4. Click **OK**.

Note: When a PAF is cloned, the following information is **NOT** carried copied:

- PI signatures on PAF/Conflict of Interest Statement
- Attached documents
- Answers to some of the PAF Worksheet questions.

Tip: Use the Hide/Show Errors function within the PAF Worksheet to display the required fields that do not copy when a PAF is cloned.

PAF Workspace Recent Activity Section

The screenshot shows the 'eResearch Proposal Management Sandbox' interface. The top navigation bar includes 'Main', 'Contacts', 'Change Tracking', 'Activity History', 'Attachments', 'Hardships', 'Unit Comments', and 'Posted Comments'. A sidebar on the left contains various management options like 'Unit Review', 'PAF Summary', 'PAF Worksheet', 'Manage Data', and 'Activities'. The main content area displays details for a PAF titled 'Implementing Electronic Proposal Management Systems: Teaching New Tricks to Old Dogs'. Below this, a 'Recent Activity' section is highlighted, showing a table of activities. A callout box labeled '5' points to the 'Activity' column, '6' to the 'Author' column, and '7' to the 'Activity Date' column. The activity listed is 'Project Team Cloned PAF' by 'Pat Admin' on '4/29/2009 11:19 AM EDT'.

Activity	Author	Activity Date
Project Team Cloned PAF	Pat Admin	4/29/2009 11:19 AM EDT

5. Notice that in the Recent Activity **Project Team Cloned PAF**.
6. Who cloned the PAF is displayed as **Author**.
7. When the PAF was cloned is displayed as **Activity Date**.
8. Click **My Home** to return to your Home Workspace.

Home Workspace

The screenshot shows the 'Home Workspace' in the 'eResearch Proposal Management Sandbox'. The top navigation bar includes 'Pat Admin | My Home | Clipboard | Logout'. A sidebar on the left contains an 'Announcement' and 'Roles'. The main content area displays a list of 'PAFs with Required Action'. A callout box labeled '9' points to the 'PAFs with Required Action' header. Below this, a table is shown with columns for 'ID', 'Name', 'Date Modified', 'State', 'PI', 'Dept', and 'Sponsor'. A callout box labeled '10' points to the 'State' column. The PAF listed is 'Implementing Electronic Proposal Management Systems: Dogs and Tricks Part 2' with a state of 'Proposal Preparation'.

ID	Name	Date Modified	State	PI	Dept	Sponsor
09-PAF01753	Implementing Electronic Proposal Management Systems: Dogs and Tricks Part 2	4/29/2009 11:19 AM	Proposal Preparation	InezInv	Mechanical Engineering	

9. Your cloned PAF appears in the **PAFs with Required Action** section of your Inbox.
10. Notice that the state of your cloned PAF is **Proposal Preparation**.