

Reopen/Copy/Reuse a Workspace

RA Support Quick Reference Guide







Grants.gov Workspace: Reopen, Copy, or Reuse?

You don't always have to start with blank fields with Workspace.






| Option | Details | Restrictions |
|----------------------|--|---|
| <p>Reopen</p> | <ul style="list-style-type: none"> Allows you to update & revise all aspects of the Workspace. Best option for Change/Corrected. Retains the same Workspace ID. Available for Submitted workspaces – this action essentially “reuses” all the workspace. (The prior submission details completely retained in the ‘Details’ screen. The re-opened workspace will add a new row in the Details screen at submission with a separate grants.gov tracking ID and details. | <ul style="list-style-type: none"> Funding Opportunity must still be OPEN. (Not available if workspace in Archived status – e.g. funding opportunity is closed.) Best used when substantially the same submission – like change/corrected. Possible good option for Resubmission or revisions, but would require high level of scrutiny of all fields & replacing attachments specific to the subsequent submission. |
| <p>Copy</p> | <ul style="list-style-type: none"> You can enter the Funding Opportunity Number or the Opportunity Package ID, or you can search from all workspaces you have access to. Creates a new Workspace ID with copies of the form details and attachments. | <ul style="list-style-type: none"> The funding opportunity selected must be the same, or have the same forms. If this isn't substantially the same proposal, many fields need to be updated. Does NOT copy participants or AOR from source workspace. |
| <p>Reuse</p> | <ul style="list-style-type: none"> Select a specific FORM to copy, not the entire workspace. Could be a real time-saver for Senior/Key Person Profile, and Performance Site/Location forms for ‘the usual suspect’ proposal collaborators. Allows you to create a WS from a ‘parent’ or BAA opportunity to use as a template – especially one with the SF424 R&R, Senior/Key Person Profile, & Project/Performance Site. | <ul style="list-style-type: none"> To reuse a previously completed form, it has to be the same form title, and must be in Passed status. The Reuse process overwrites anything already added once you select a form to reuse. Due to form version differences, not all data may be copied – but it will populate the compatible fields. If the form you copied caused an error due to bad/incomplete data in the prior submission, it will create the same error if that item is not addressed. |

Reopen a Workspace

- When the workspace is in the *Ready for Submission* or *Submitted* status, and when the application package forms are up-to-date, the **Reopen** button will be visible. After a workspace is marked completed or submitted, the workspace is closed to further edits and updates, unless it is first reopened via the **Reopen** button. When a workspace status is New, In Progress or Archived, or if the application package forms are out-of-date, the **Reopen** button will be invisible – not an option for this workspace.
- The **Reopen** button will only be active for the following Participants:
 - Workspace Owners and Participants with the AOR role on the **Manage Workspace** page
 - All Participants with access to the **Manage Workspaces for Organization** page
- When the **Reopen** button is clicked, the following actions take place:
 - The workspace status will be changed back to In Progress.
 - The activity will be noted in the **Activity** tab of the workspace.
 - The workspace page will be refreshed, and a success message will read, “Workspace successfully reopened.”

| Situation | Reopen |
|--|---|
| Change/Corrected version of the same proposal |  |
| New submission; same PI, same forms, Funding opportunity is open |  |
| New submission, same PI, same form versions, Funding opportunity is closed |  |
| Funding opportunity closed -- form versions not all the same |  |
| Created a new workspace, but forms/data are identical to a prior submission. | n/a |





Legend:

| | |
|--------------------------|---|
| Best option: |  |
| Can do |  |
| Cannot do |  |
| May not provide all data |  |
| Big lift |  |






How to Copy a Workspace

- Login and click the **Manage Workspaces** link.
- Enter search criteria and click the **Search** button to display the results for all workspaces you have access to.
- Click the **Copy** link in the **Actions** column for the existing workspace you wish to copy. If you do not see the **Copy** link, then you do not have requisite access to copy a workspace. Users must have access to all forms or all non-budget forms to copy a workspace.
- Enter either the **Funding Opportunity Number** field or the **Opportunity Package ID** field that corresponds to the grant you wish to apply for. If more than one application package fits this search criteria, you will be prompted with a list. Click the **Select** link for the correct application package.
- Create a descriptive application name in the **Application Filing Name** field. (Please include your KC Proposal number, your PI last name, & lead unit at a minimum to help us identify & support this submission).
- Click the **Copy Workspace** button. Upon a successful creation, you will be directed to the Manage Workspace page.

Note: Applicants are responsible for reviewing and verifying all data in their application forms. Please verify that all forms data is correct after copying a workspace – especially if the source and destination workspaces have different form versions, as there are often changes to forms between versions.

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How to Reuse a Workspace Form

To reuse a previously completed form, it has to be the same form title.






The reuse form functionality **does** work with other versions of the same form.

1. In the **Forms** tab of the **Manage Workspace** page, click the **Reuse** link in the **Actions** column.
2. Enter search criteria to locate a form with the same title, then click the **Search** button. Note: only forms in "Passed" status with the same title will display in the search results.
3. Click the **Select** link in the **Actions** column. You may also click the **Preview** link to review the form to ensure it has the information you wish to reuse in this workspace.
4. Upon clicking the **Select** link, the form will be added to the workspace, the **Application Package Forms** table under the **Forms** tab will be refreshed, and the uploaded form's status will be updated.

Note: Applicants are responsible for reviewing and verifying all data in their application forms. Please verify that all forms data is correct after copying a workspace – especially if the source and destination workspaces have different form versions, as there are often changes to forms between versions.

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Questions?

Contact: ra-help@mit.edu

