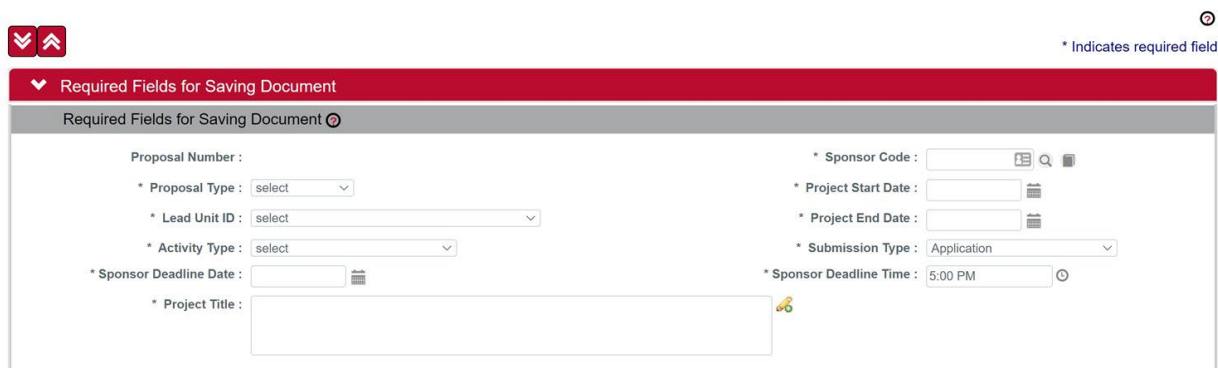


# QUICK TIPS

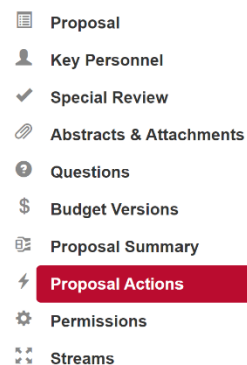
## How to Change the Lead Unit


In order to create a new proposal document, the **Lead Unit ID** is specified in the **Required Fields for Saving Document**. Once the document is saved, this field is not available for editing.



To change the lead unit on a proposal, copy the proposal to a new proposal development document.

1. Within the existing proposal document, navigate to the **Proposal Actions** section and open the panel labeled **Copy to New Document**.



2. Tick the boxes next to the parts of the proposal you wish to copy. To make an exact copy, tick all of the boxes.
3. Use the drop-down menu labeled **Lead Unit** to designate the new lead unit for the copy.
4. Click **Copy**.
5. Use the icon at the top left of the screen to access your Action List, and find the new proposal document. 
6. Be sure to verify if these changes impact the Unit/Department Details for **Key Personnel**.

▼ Copy to New Document

Copy to New Document

Proposal:

Lead Unit:

Budget? :

Attachments? :

\* Lead Unit :

Questionnaires? :

Custom Data? :

S2S Opportunity & Tracking Info? :

Template? :

Webforms? :

yes

433A

☒ all versions ▼

☒

select ▼

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Copy Proposal

select ▼

select

000001 - University of New Mexico

000A - Taos Executive Director

001A - Taos Science Natural Resources

002A - Taos Professional Liberal Arts

003A - Taos Trades Industries

004A - Taos Business Computer Technology

005A - Taos Health Human Service

006A - Taos Arts Culture

008A - Taos Instructional Support

008D - Taos Inst Supp Adult Basic Educ

009A - Taos Student Affairs Student Svcs

010A - Taos Career Planning Placement

011A - Taos Admissions Registrars

012A - Taos Financial Aid

016A - Office of Equal Opportunity

017A - Taos Business Office

018A - Taos Student Accounting

019A - Taos Human Resources

020A - Taos Security Services