PennERA - Proposal Development

Subcontract Budget Import

Interest Areas: Budget; Subcontract; Adobe Forms

Overview

For external subcontracts to Penn, users will be able to import completed budget data directly from Adobe Research & Related (R&R) form sets into their Proposal Development records instead of entering the data manually.

Advantages

- Eliminates any manual data entry of subcontractor budget items.
- Eliminates the need to do potential reverse calculations to obtain accurate budget data.
- Significant reduction in the need for last minute communications between Penn and subcontract administrators to get budgetary information.
- Imported budget CAN be edited in the proposal record if necessary.

Importing an Adobe R&R Budget Form into PennERA

- Navigate to Budget > Budget Items.
- On the Subcontractors line, select “Import”.

  ![Subcontractors Import](image)

  **Select Subcontractor/Consultant**

  ![Select Subcontractor/Consultant](image)

  ![Subcontractor Import](image)

  **Locate the Subcontractor Organization and Subcontract PI.**

  ![Add Import](image)

  **Upload the Subcontractor’s completed SF424_R&R Budget form.**

  **Select the appropriate number of years to import into the PD record and assign them accordingly.**

  ![Add Import](image)

  Budget detail in the uploaded SF424_R&R Budget form populates the PD Subcontract budget section.

  The section remains editable in PD and operates the same as a manually entered Subcontract budget.

For further assistance, please contact PennERAhelp@lists.upenn.edu.