PennERA - Proposal Development

Subcontract Budget Import

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

Note: Users should click “Check Form for Errors” in the Adobe form they plan to import. All errors should be corrected prior to importing into PD.

- Navigate to Budget > Budget Items.
- On the Subcontractors line, select “Import”.
- Locate the Subcontractor Organization and Subcontract PI.
- Upload the Subcontractor’s completed SF424_R&R Budget form.
- Select the appropriate number of years to import into the PD record.
- Map Budget Periods, Personnel Names and Departments to the appropriate options from the list. Note: If Name is not present, select ‘Add New’ from the list. If Department is not present, enter it in the adjacent box. Department must be defined, “N/A” and “TBD” are not appropriate Department names.
- 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.