LEHIGH
U N I V E R S I T Y

LIRA Upgrade Summary: Huron Suite (10.1.1 → 10.5.8)
Complete List of User Enhancements and Behind-the-Scenes Fixes

1. Budgeting & Budget Workflows

1.1 Enhancements in Personnel Budgeting

- Shift from Salary-Based to Effort-Based Budgeting
    - Users now enter Effort-Months
    - Effort values now drive how personnel map to federal forms (SF424 R&R), ensuring consistent interpretation between Grants budgeting and sponsor forms.

    - Multiple fixes ensure:

        - Correct rendering of effort months in SF424 fields.
        - Elimination of incorrect salary-based calculations
        - Accurate handling of zero-effort personnel.

    - This change fundamentally modernizes personnel budgeting: users see effort-based fields consistently across the proposal → SF424 pipeline.

1.2 Budget Editing Permissions

- PI cannot edit budgets during Specialist Review - PIs now have read-only budget access when the proposal is in Specialist Review.

- Assigned Specialist gains consistent Edit Access across more states

    - Specialists can edit budgets in Draft, Dept Review, Specialist Review, and Post-Submission request- Response Required.

1.3 Budget Calculations & Mappings

- Personnel effort/salary correctly mapped to SF424 R&R budget

    - Corrects regressions where salary values were incorrectly sent instead of effort.

- Personnel with zero effort no longer mapped to SF424 R&R

- Subaward budget category names standardized

○ Subaward categories now appear as Subawards (included in base) and Subawards (excluded from base).

1.4 Cost Share Budgets

- Improved alert prompting creation of Cost Share budget when personnel values imply cost sharing

1.5 Budget Snapshots

- Automatic budget snapshot creation when users:

    ○ Submit to Non-Grants.gov Sponsor
    ○ Submit to Federal Sponsor
    ○ Submit via Proposal Team
    ○ Submit Post-Proposal Submission Response

- Budget snapshots include total costs, direct, indirect, timestamps.

- Snapshots no longer copied when copying a proposal.

- MTDC removed from budget snapshot views.

1.6 Award & Award Modification Budget Reconciliation

- Rollup adjustments now show initial baseline budget and cumulative variances.

- Award Modification budget reconciliation displays adjustments from prior modifications correctly

- Correct mapping of "Other" budget category from proposal to award.

2. Personnel, Effort & Certification

2.1 Effort & Personnel

- Effort now displayed in person months or percent on award records

- Effort Metric default applied to awards missing this value- improves accuracy of effort displays. Therefore, if nothing is entered, a set default value (0.05) will display.

- SF424 PI ordering corrected: Primary PI listed first, then PIs sorted by last name.

- Personnel details correctly render on SF424 even with zero salary.

2.2 PI Certification

- Inbox tracking updated; outstanding certifications remain until completed.

- Certification counts shown on workspace ("Certifications Complete").

2.3 FCOI Integration

- COI "Withdrawn" status displayed on Award/Award Modification views when a research certification is withdrawn in COI.

- New PI automatically added to FCOI investigator set when changed in Award Modification.

- Send to COI activity exposure corrected on award modifications involving personnel changes.

3. Proposal Workflow & Reviews

3.1 Ancillary Reviews

Major systemwide improvements:
- Manage Ancillary Review and Submit Ancillary Review available in all workflow states for:

    - Proposals
    - Awards
    - Award Modifications

- Ancillary reviewers retain project access after completing review.

- Organization chooser filtered to only organizations with defined ancillary reviewers.

3.2 Department Reviewers

- Recalculates department reviewers automatically when proposal department changes.

3.3 Continuation Proposals

Enhancements:
- New Application Deadline field added to Proposal main page

- Internal submission deadline auto-calculates using weekdays, not calendar days.

- Deadline displayed on workspace & project listings.

3.4 Reinstate & Withdraw Actions

- Reinstate Proposal now available in more states including Pending Sponsor Review, Award Anticipated, Award Notification Received, Withdrawn from Sponsor.

- Withdraw available in more Award/Award Mod states such as Pending Approval/Activation

4. AWARD WORKSPACE Modifications

4.1 Award Modification Creation & Validation

- Fix for award modification creation when modification count exceeds 99

- Allocation & Award End Date can be changed within the same modification

- Budget allocation descriptions now synchronize between awards and child modifications

4.2 COI-Related Award Modification Views

- COI Disclosure Status visible until modification is approved or withdrawn

4.3 Award Modification Security

- Award Modification readers no longer get edit access

- Send to COI logic corrected

5. SF424 & GrantsMap

5.1 Major Mapping Improvements

- GrantMap updated for SF424 10.6 & AutoMap 10.6

- Updated again for SF424 10.7 and AutoMap 10.7

- PHS 398 Training Budget mapping added

- UEI mapping added for Multi-project R&R Cover page

- Regional Food System Partnership Program V1 supported

- Farm to School Grant Program V4.0 supported

- Assurances as to Labor Standards V1.0 supported

- Descriptive Title now uses long title, not internal short title

6. System Functionality, UI, & Quality of Life Fixes

6.1 General UI / Form Fixes

- Help text corrected for General Proposal Information Q1
- Slide-in windows close properly on read-only awards

6.2 Copying Proposals

- Proposal Submission Date no longer copied
- Submission-related proposal attachments no longer copied
- Budget snapshots not copied

6.3 Error & Validation Fixes

- Multiple Create-Update SF424 activity fixes
- Fix for Proposal History tab errors with special characters
- Fix for cost share budget creation errors
- Fix for issues with protocols on Award Modification compliance review

7. Performance, Data Integrity & Background Processing

7.1 Financial Account Data Corrections

- Migration identifies and fixes invalid account references.
- Admins must reselect accounts for any logged exceptions.

7.2 Performance

- Award Modification approvals with many related proposals no longer timeout— heavy processing moved to background jobs.

8. Agreements Communication and Data Tracking

8.1 New Ancillary Review (AR) Tab

- The **Ancillary Review table is removed** from the center of the Agreement workspace.

- A new **Ancillary Review tab** now houses all review information.

- Displays:

  - Comments and documents from requester and reviewer
  - Date review created
  - Date review submitted
  - All comments/attachments added during "Add AR" and "Submit AR"

Impact: This will allow for easier tracking, centralized review information, and anyone with access to the agreement can now view all Ancillary Reviews.

8.2 Ancillary Review Notification Email Changes

- Email subject line updated:

  - **Was:** "Assigned for Ancillary Review"

○ **Now:** "Response needed to Ancillary Review request"

● Ancillary reviews can now be queued during pre-submission and set to send only after the Agreement is submitted. This will allow for clearer instructions in the email and improved control over when reviewers receive requests.

8.3 Updated "Submit Ancillary Review" Screen

● Additional data fields displayed.

● Wording of Question 2 updated.

● A **new question asking whether the Ancillary Review is complete**.

● Screen now fully aligned with the Grants version of "Submit Ancillary Review."

Impact: This change will allow for a more consistent review process across modules; reviewers see clearer prompts and status indicators.

8.4 Submit Ancillary Review

● Comments & Attachments Now Visible in History

● Any reviewer-added comments or attachments during "Submit AR" are now recorded on the Agreement's History tab.

Impact: With this update, it makes it easier for the user to see the history and comments and track the reviews. This improves the audit trail and transparency for dept admins and central staff.

8.5 Submit Ancillary Review Email Subject Change

● When an Ancillary Review is submitted, the email subject changed:

○ **Was:** "[Agmt ID] ancillary review submitted"

○ **Now:** "[Agmt ID]: Response provided to Ancillary Review Request"

Impact: Clearer messaging for administrative contacts and agreement owners.

8.6 New Question for Additional Contracting Parties

● The General Information SmartForm in each agreement record now includes a new question allowing users to add multiple additional contracting parties.

● Added parties appear in a new table once entered.

Impact: For agreements with multiple institutions and individuals included, this update better captures these more complex contracting situations and external contacts.

8.7 State Name Changes

Two workflow state names have been updated for clarity for the signature process of agreements:

Previous State Name	New State Name
Routing for Signature	Internal Signature
Out for Signature	External Signature

Impact: State names now better reflect their function and reduce confusion for routing and tracking.