**THE LIFE CYCLE OF IDEAS AND GRANT PROJECTS**

Idea status codes are provided in red (see the database DDL SQL for a complete list). This document currently includes the life cycle only through GD1 and GA1 (about half of the Idea life cycle). Also, it does not yet include the project phase of our work.

1. References:
2. The life cycle of Ideas
   1. **ST** Any registered user can create an Idea by starting a new Idea on the sharemyidea.html page.
      1. This page is accessible by clicking the ‘Share a New Idea’ button at the bottom of the shareidea.html page.
      2. Idea status is initialized as ‘ST’ – Idea started.
      3. The Idea data is saved to table ‘ideatemp’.
      4. The associated users are saved to table ‘userideatemp’.
      5. Simultaneously with saving an Idea, information about users associated with the Idea are saved to table ‘userideatemp’.
   2. **UP** After starting an Idea, the user may modify and save the Idea as often as desired. If not all ‘not null’ columns have been populated the Idea cannot be saved to table ‘Idea’. Therefore, table ‘ideatemp’ is used to save early Ideas until the first moment when no errors are identified on the ‘Share My Idea’ form.
      1. Then:
         1. Idea status is upgraded to ‘UP’ – updated.
         2. The Idea is saved to table ‘idea’ and deleted from table ‘ideatemp’.
         3. The associated users are save to table ‘useridea’ and deleted from table ‘userideatemp’.
   3. **S1** When the user is satisfied with the Idea and desires to send it in, the user clicks the “Send My Idea” button.
      1. The Idea must be submitted by a user with a project role of PI1 – Principal investigator with submit authority.
      2. The Idea status is changed to ‘S1’ – initial submission of the Idea.
      3. A message is inserted into table messages to alert SFF management.
      4. The Idea is locked so users can no longer make changes to the Idea.
      5. S1 also denotes the queue (list of Ideas) to whom we need to send E1 confirmations.
   4. **E1** A confirmation letter is emailed to all PIs with a project role code of ‘PI1’ for ‘projrolecode’ on table ‘useridea’.
      1. The Idea status is changed to ‘E1’ – confirmation of initial submission sent.
      2. An email is automatically sent confirming various submitted documents have been received and describing the next steps.
      3. E1 denotes the queue for Ideas to be reviewed by the President.
   5. \*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\* Reviewed through here \*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*
   6. **PD or** **PA** The SFF President reviews Ideas for reasonableness and responsiveness and forwards those reasonably satisfactory Ideas (low threshold) to the Grants Committee.
      1. If declined, the status changes to ‘PD’ – President Declined and adds the Idea to the queue for decline letters.
      2. If accepted the status changes to ‘PA’ – President Accepted.
         1. The Idea is forwarded to the Grants Committee by adding the Idea to the Grants Committee initial Idea review queue.
   7. **PD1** When the President’s decline letters are sent the code is changed to ‘PD1’ – President declined. The Idea is closed.
   8. **GDa or GA1** The Grants Committee reviews the Idea (see SFF Grantmaking procedures) and either declines (‘GDa’) or accepts (‘GA1’) the Idea. (Future enhancement - currently done manually).
   9. **GD2** When the Grants Committee decline email is sent the Idea is changed to status ‘GD2’ – closed. (Future enhancement - currently done manually).
   10. **All remaining status code changes are for future enhancement**
       1. See Ref 1.a. for the official list of all Idea Status codes and their descriptions.
   11. **The following steps have not been reviewed or finalized.**
       1. Closed Ideas are archived.
       2. Accepted Ideas become finalists.
          1. This changes the Idea status to ‘GA1’ - finalist. (Currently a manual update).
          2. A registered PI can then begin entering information for finalist submission.
          3. The system sends a letter to all PI1 users for the Idea notifying them the Idea was selected as a Finalist.
   12. When satisfied, a PI with update authority on table useridea can click a second submit button.
       1. The system checks to make certain at least one person associated with the project is designated as PI.
       2. Idea status changes to submit 2
   13. Grants Committee reviews the finalist submission
       1. If declined the status changes to closed.
       2. If approved the Idea is considered by the BOD
   14. BOD reviews the submission
       1. If approved the Idea status changes to “in contracting”
       2. If declined the status changes to closed.
       3. When signed the Idea status changes to “closed
       4. All relevant info is used to create a new Project.
3. The life cycle of Grant projects.
4. Checkpoint summary:
   1. P1 started
   2. P1 sub.
   3. P1 resp sent
   4. P3 started
   5. P3 sub
   6. Declined sent
   7. Granted sent
   8. Closed
   9. Proj num

PAGE HEADINGS will change on the (now) 3 input pages as follows:

SHARE MY IDEA

INITIAL INPUT PAGE

SHARE MY IDEA

PROJECT ASSOCIATES INPUT PAGE

SHARE MY IDEA

FINAL INPUT PAGE