Objective: Agencies understand how to create & manage a Team associated with their eCivis Project.

*Define your eCivis Project's Team Members**

When you create a new project, the creator of the project and the assigned Project Lead will be listed as project team members. From the Project Dashboard, you can perform a variety of tasks surrounding the Project Team.

*A note about Project Teams: it's important to consider who will be involved in a grant/ project's application preparation, & post-award management. And the Project Lead will likely a program director who will manage the grant.

Add Project Team Members

1. Click on the green plus sign icon beside "Project Team".
2. A pop-up will appear that asks you to select the Department where the new project Team Member works, and the specific Team Member (once the Department is selected). After you select the Department and Team Member, you can click "Save" to add the selected Team Member, or click "Save & Add Another" to add more Team Members to the project:

Change the Project Lead

1. The current Project Lead will have the word "Lead" beside their name in your Project Dashboard. Click on the word "Lead."
2. A pop-up will appear that lists the current Project Lead and contains a drop-down menu of all project team members. Select your new Project Lead from the drop-down menu:
3. Click "Change Project Lead."
4. The Project Lead is now changed:

Manage Team Member Settings

1. Click on the pencil icon beside "Project Team."
2. You will be taken to a new page that lists all the current project team members, and their current permissions and email alert settings:

3. The "Set Permissions" section provides two options for your project (View and Edit)
   a. View: A specific project team member can only see project and grant information, but not make changes.
   b. Edit: A specific team member can make changes to project settings, and grant information. All Team Leads will have "Edit" access by default.

4. The "Set Grant Status Email Alerts" section allows you to control the types of emails your project team members will receive.
   a. Applying: email notification when a grant is in the "Application Preparation" stage within the project.
   b. Submitted: email notification when a grant is in the "Application Submitted" stage within the project.
   c. Awarded: email notification when a grant is in the "Funds Awarded" stage within the project.
   d. Amendment: email notification if there is an amendment to a grant within a project (eg: the grantor awards additional funds on top of the original award amount).
   e. Setup Account: email when an approval request is sent to the budget team to approve awarded funds.
   f. Report Submitted: email whenever any scheduled report task is marked as "Done."

   NOTE: You can add team members to your project from this page by clicking the "Add Team Member" button. This will open the same pop-up as before on which you select a department and specific team member.

5. Click "save" after setting up project team permissions, email alerts, & added additional team members you wish.