



How to Edit your Project Team

A Project Team in eCivis is a user or a group of users assigned to a specific project. While Department Master Account Holders (DMAH) can see every project workspace in their agency, Department users can only see/access the project workspaces for which they are part of the Project Team. Project Team members can perform grant related functions, such as creating tasks, editing the grant budget, adding documents, updating goals & metrics, and creating spending reports. The Project Team is located on the right side of the screen of a project workspace.

Project Dashboard: Conservation Programs

Department: Department of Administration

The screenshot shows the Project Dashboard for 'US11417 The Community Forest and Open Space Conservation Program (CFP) - FY 2022'. The dashboard includes tabs for Overview, Documents, Grant Lifecycle, Goals & Metrics, Budgets, Contracts & Accounts, Spending, and History. A 'Project Team' section is highlighted with a red box, showing 'K. Benoit (Lead)' and a 'Grant Manageme...' link. Below this, there are 'Available Actions' with radio button options for various tasks like accessing details, requesting account setup, updating reports, and managing goals and metrics.

To add members to a project team, click on the green plus icon. This will allow you to choose from a list of active eCivis users in your agency to add to your Project Team. Once you select a team member to add, select "Save" or "Save & Add Another" to add more team members.

The 'Add New Team Member' dialog box is shown. It has a title bar with 'Add New Team Member' and a close button. The main area contains two dropdown menus: 'Department' (set to 'Department of Administration') and 'Team Member' (set to 'Select Team Member'). Below the dropdowns are three buttons: 'Save', 'Save & Add Another', and 'Cancel', each with a right-pointing arrow.



Once you hit Save, you can now see the users you added to your Project Team.

Project Dashboard: Conservation Programs

Department: Department of Administration

Data Integration Options Project Options

Overview	Documents	Grant Lifecycle	Goals & Metrics	Budgets	Contracts & Accounts	Spending	History
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Active Grants

[US11417 The Community Forest and Open Space Conservation Program \(CFP\) - FY 2022](#)

Stage: Implementation Awarded: \$1,000,000.00 Match: \$100,000.00

Available Actions

- I would like to access details of this grant
- I would like to request an account setup
- I want to update my scheduled reports
- I want to update my submitted reports
- I have received a grant adjustment notice and need to amend my grant agreement
- I am ready to initiate grant closeout.
- I would like to view/manage my contract & account details
- I would like to create/manage goals and metrics for this grant
- I would like to create/manage a budget for this grant

Project Team

K. Benoit (Lead)	Grant Manageme...
B. Murphy	Programming Se...
L. Sullivan	N/A
S. Thompson	test

To change who the Project Lead is, click on “(Lead)” and you will be given the option to move that role to another current Project Team member. Select “Change Project Lead” to finalize this.

Change Project Lead

Current Project Lead: Katje Benoit

New Project Lead: Brianna Murphy ▼

Change Project Lead > Cancel >



To edit the email preferences of each Project Team member, select the yellow pencil icon. Here you are given options to allow Project Team members to be view only or have edit access to the project workspace. Grant Status Alert emails can also be set here based on the preferences of each user on how often and for what they wish to receive emails pertaining to this specific project workspace. You can also remove team members from this screen. Select “Save” to finalize all changes.

Team Member Settings

Conservation Programs

[+ Add Team Member](#)

Team Member Settings										
		Set Permissions		Set Grant Status Email Alerts						
Remove	Team Member	View	Edit	Applying	Submitted	Awarded	Amendment	Setup Account	Report Submitted	
	K. Benoit (Lead)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	B. Murphy	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	L. Sullivan	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	S. Thompson	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

[Save](#) [Cancel](#)