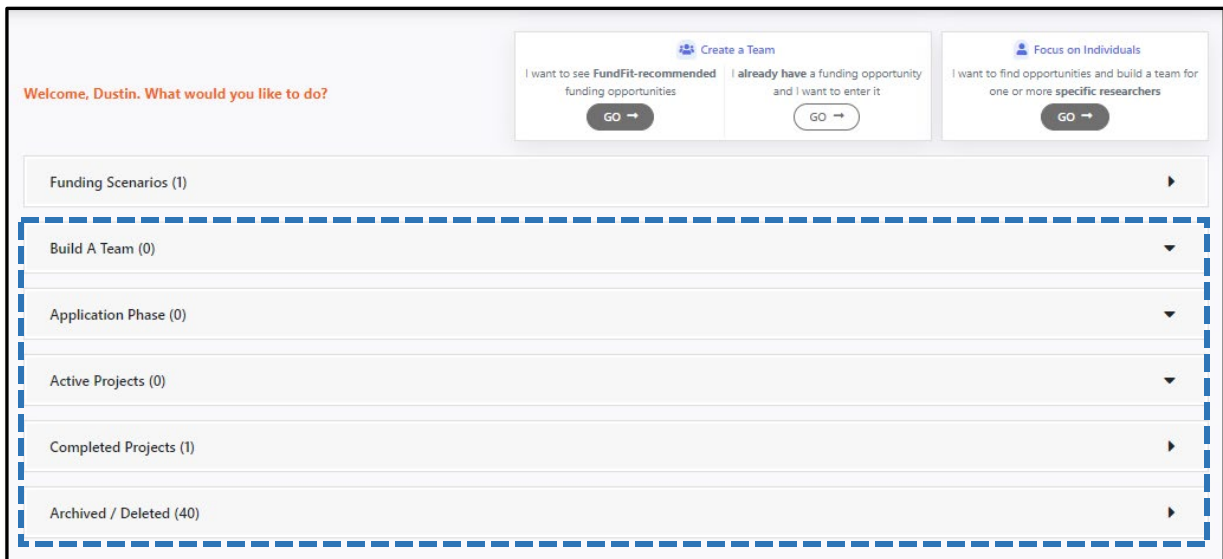# MOVING THROUGH THE PROJECT STEPS

In the previous guide, we covered the **Funding Scenarios** panel as part of building your team for your FundFit project. Now, we'll go over the remaining panels that you will encounter as you move forward in the process.



1.  After building your team and clicking on the "Next Step" button on the **Funding Scenarios** panel, your opportunity and team will move down into the **Build a Team** panel. Here, you can remove any team member added in the previous step by unchecking the box next to their name. Additionally, you will find additional researchers to consider at the bottom of the list of team members, as well as an option to manually add researchers that weren't pulled into the initial list of matches.
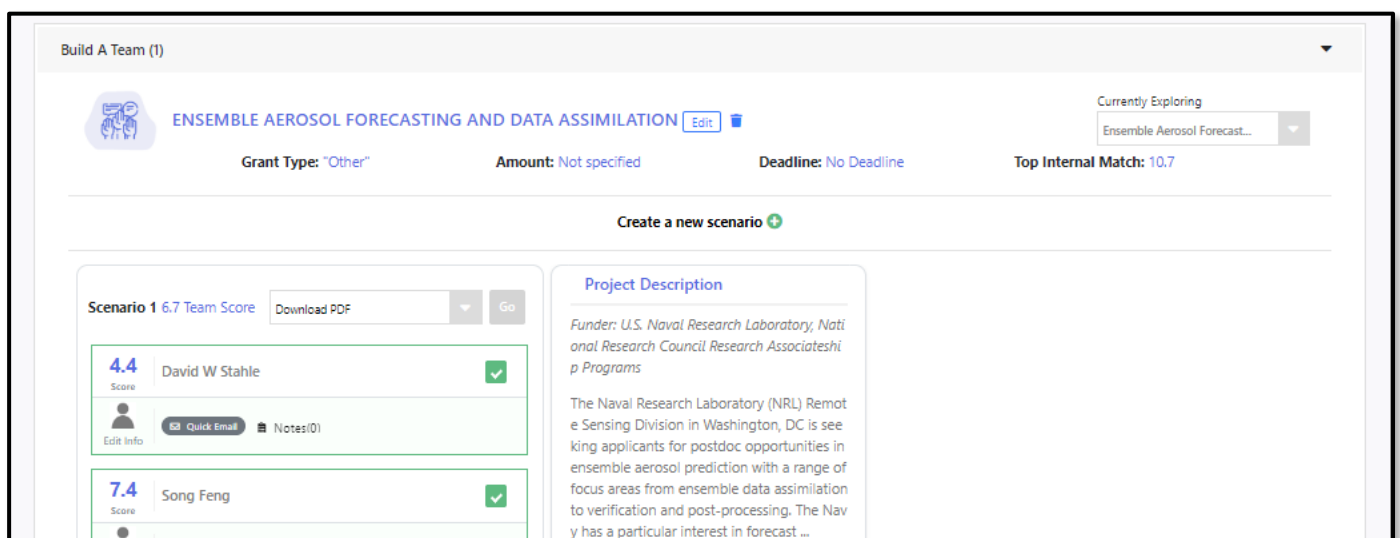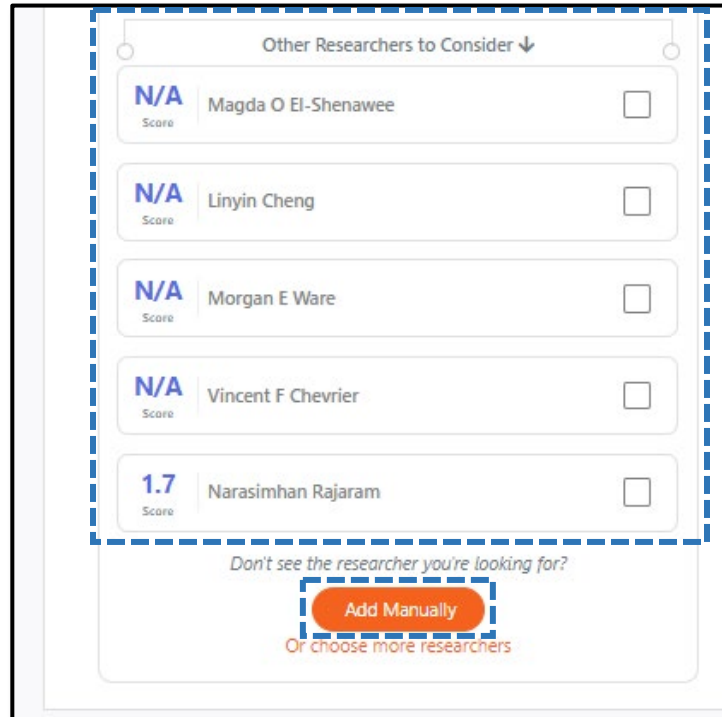
When adding manually, you will get a popup like the image below. Type in the researcher's name (full or partial) to begin the search. When you how found the researcher that you would like to add to the team, click "add to list" to pull them in.
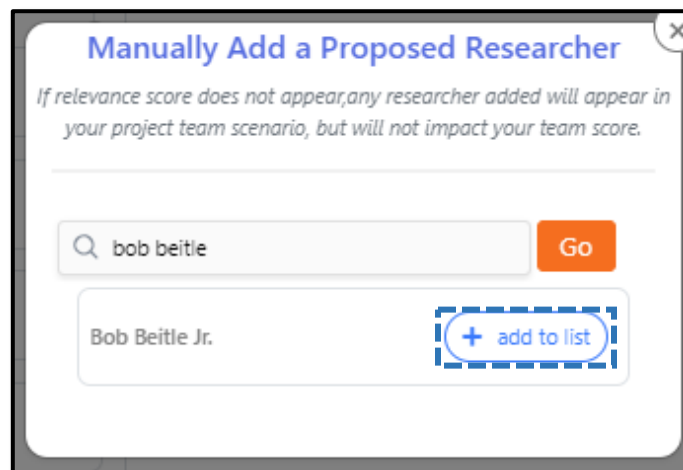


If you would like to build an alternate team, click the "Create a new scenario" link to start building a second team. This new team will start with no selected team members, but will provide the list of other researchers to consider from the original team along with the option to manually add additional researchers to the team.
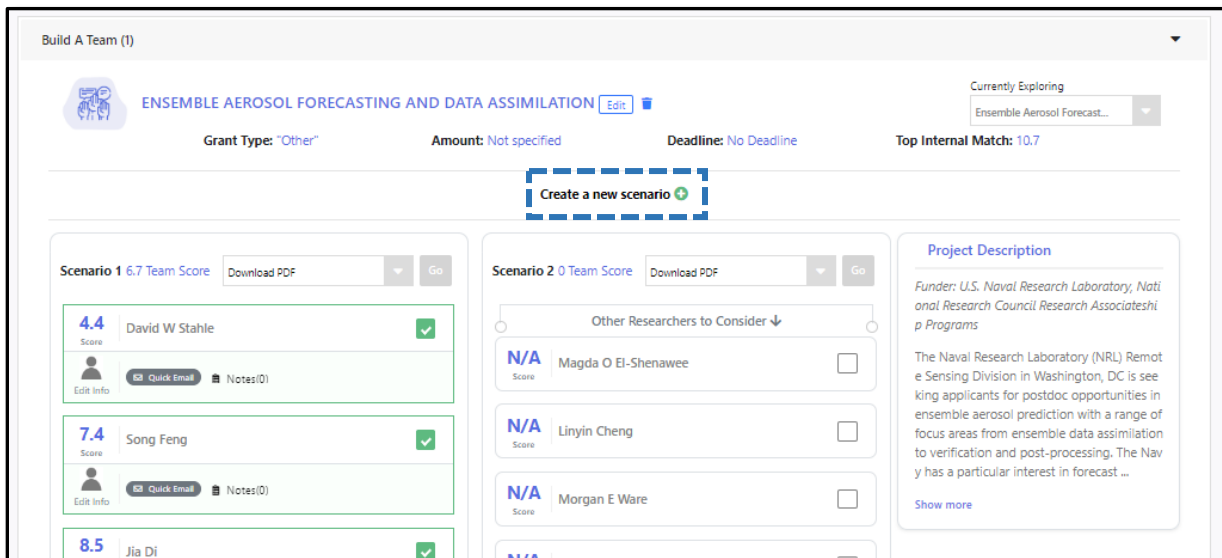
2. At the top of each scenario, you will see a dropdown with a few options. After selecting an option, click the "Go" button to the right to perform the selected action.
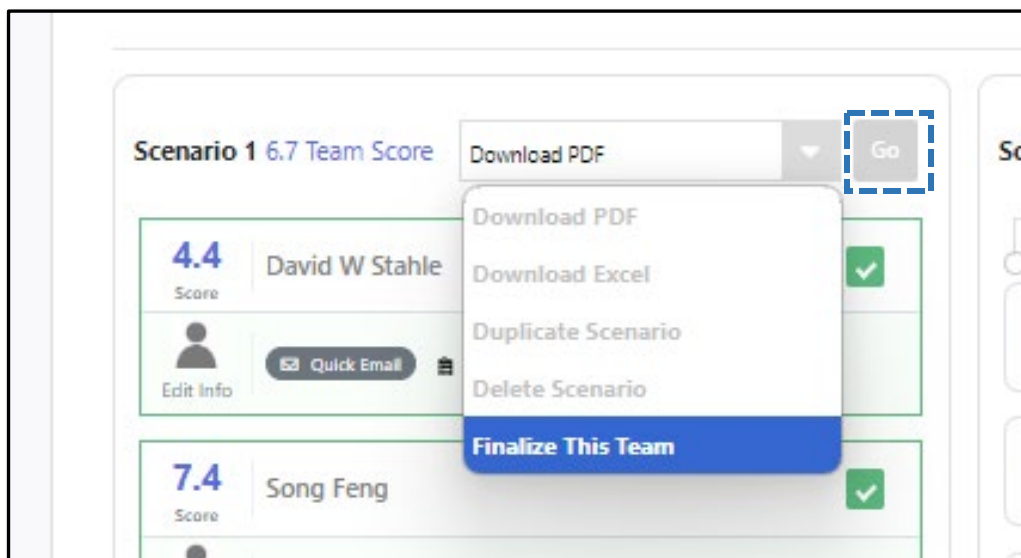


a. **Download PDF** – Print a PDF document listing the selected team members for the scenario.

b. **Download Excel** – Print an Excel document listing the selected team members for the scenario.

c. **Duplicate Scenario** – Functions the same as the "Create a new scenario" option mentioned earlier, except that this new scenario will automatically bring in all selected team members. Best for when you want to create an alternate scenario with only a couple of changes.

d. **Delete Scenario** – Removed the scenario from the **Build a Team** panel.

e. **Finalize This Team** – Moves forward to the next panel with the selected team/scenario.

3. The next panel is the **Application Phase** panel. Here, you have the option to add any application notes that you want to log as well as make any last-minute substitutions to the project team. Checking the box next to a researcher under the "Other researcher options" section will prompt you to replace an existing team member with the new selection. You can also do a manual search for a researcher at the bottom of the panel the same way as in the previous panel.



Once a determination has been made, you can update the "Has this funding been awarded?" section.

Selecting "We didn't win – move to archive" will move the project to the bottom panel, **Archived / Deleted**. Selecting "We won – move to active projects" will move the project to the next step, the **Active Projects** panel. After making your selection, click the "Confirm" button to finalize it.

If the project was awarded, you will be prompted to provide the award date and amount of the award before clicking the "Confirm" button.



4. The **Active Projects** panel is very similar to the previous panel, allowing for the same method of team substitutions and notes.

Once the project is completed, click the "I'm ready to complete" button to move the project to your **Completed Projects** panel.
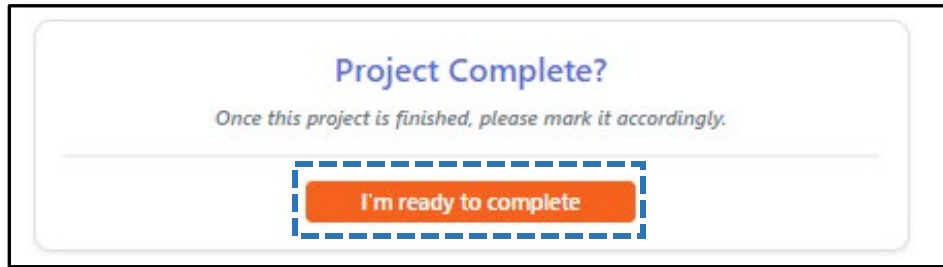


This panel keeps track of all projects that you have completed in the FundFit system.
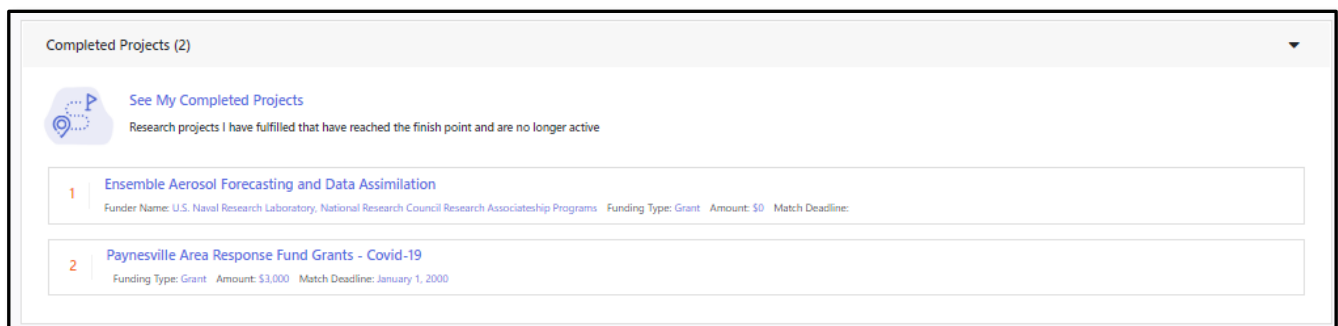


After you have moved your project to either the **Completed Projects** panel or the **Archived / Deleted** panel, you have successfully completed all of the required steps for the project.

While we covered moving a single project through each of the panels start to finish, it's important to note that you can have any number of projects in each of the panels. When working with multiple projects, there is a "Currently Exploring" dropdown in the top right of each panel. You can use this to swap between any of the projects currently under that panel.