Kahua Quick Reference Guide
Project Directory

Project Lifecycle Applicability

About Project Directory

[Create a Project Directory Record from the People Sub-App](#)
[Assign Permission Groups to Team Members](#)
[Create a Project Directory Record from the Companies Sub-App](#)

The Project Directory app lists the Companies and People on a project team and their roles, team function, and status.

When a project is created, the Project Manager, Project Sponsor, Property Facility Manager, and Contracting Officer are not automatically copied from the Roster section of the Projects app. Therefore, they need to be added to the Project Directory along with all other team members. Once added to the Project Directory, group permissions can be assigned to project level team members for additional Project Managers, CORs, or external users.

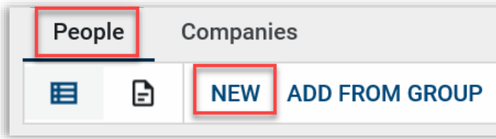
There are two methods for adding a Contact to the Project Directory: using the People Sub-App and using the Companies Sub-App.

Method 1: Create a Project Directory Record from the People Sub-App

This action can be executed by the following roles: **GSA-Regional Manager**, **GSA-PM/COR, EXT-PM**, and **EXT-Lease Broker Contractor**.

Note: The assigned Project Manager listed in the Roster section of the project's details page will be the first person to have access to the project. The PM will need to assign additional PMs, CORs, or external users who can assist with populating the Project Directory app.

1. Open the project using Project Finder in the launch bar.
2. Select **Project Directory > People** from the apps launcher.
3. Click **NEW** from the People sub-app.



Details Section

4. Select the contact person in the **Name** field. If applicable, the **Office** field will populate.

   Note: The contact must exist in the Kahua Contacts app prior to being added to the Project Directory.

5. If applicable, fill in the **Contact Team Role, Contact Team Function, Status on Project,** and any additional **Notes**.

Groups Section

6. If applicable, select a date to terminate the user's access to the project.
   a. On the specified date, the user will automatically loose access to the project but not their Kahua account.
   b. If no date is selected, the user will continue to keep their access on the project.

References Section

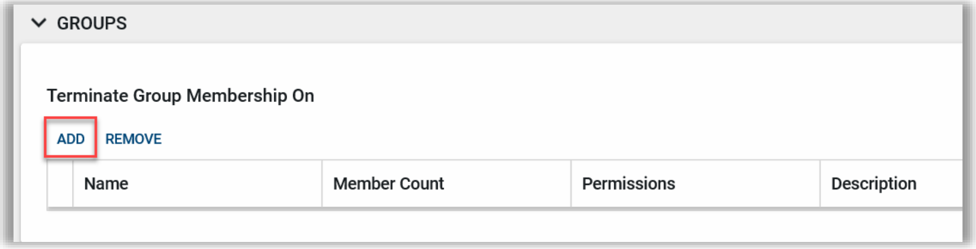
7. If applicable, attach any supporting documentation to the **References** section using the **UPLOAD** or **ADD KAHUA DOC** buttons.
8. Once all updates have been made to the Project Directory record, click the **Save / Close** button at the bottom of the form.

Assign Permission Groups to Team Members

Once a team member has been added to the Project Directory, they can be added to the appropriate permission group from the **Groups** section of the contact record in **read-only** mode. Assigning an external user to a permission group on the project grants the user access to the project.

> IMPORTANT: If the user does not have a security clearance, they may ONLY be added to the **Uncleared Contractor** group or the **Uncleared Lessor** group if Leasing. No additional permissions may be granted. For more information about the differences between permission groups, please refer to the GSA Kahua Security Matrix or, if applicable, the Leasing Security Permissions Crosswalk.

9. While in the People sub-app of the Project Directory app, click on the contact's record to view in read-only mode.
10. Scroll to the Groups section, click **ADD**.

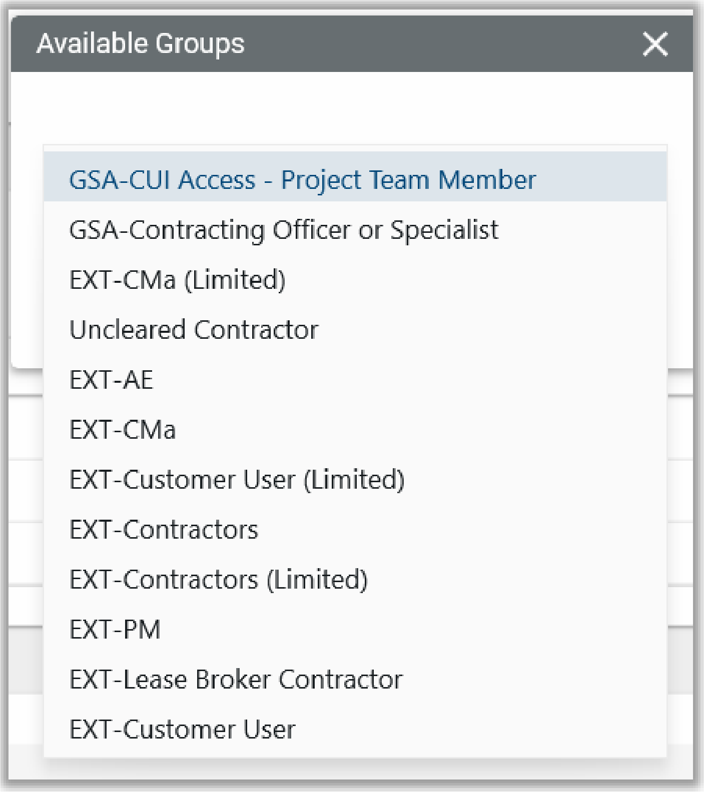


11. Select the appropriate Group from the drop-down list. If the group is not available, please contact your Regional Kahua Program Manager (KPM).

    Note: If the user is Uncleared, please select the **Uncleared Contractor** or **Uncleared Lessor** permission group. The GSA PM must also check the security status of the user in the Contacts app before adding the user. If applicable, the GSA PM must set an automatic termination date for all Uncleared users utilizing the “Terminate Group Member” feature. Please reference step 6 in the Groups Section of Method 1 above for instructions on adding a termination date.

    The automatic termination date should be the earliest date that the user no longer requires access, which is no later than the earliest contract Period of Performance end date. If none are applicable, the termination date will should be set 12 months from the date of Kahua license assignment.

    For more information about the differences between the permission groups, please refer to the GSA Kahua Security Matrix or, if applicable, the Leasing Security Permissions Crosswalk.



12. Once selected, click the **Add** button.

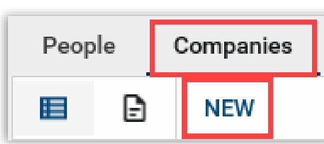
Method 2: Create a Project Directory Record from the Companies Sub-App

This action can be executed by the following roles: **GSA-Regional Manager**, **GSA-PM/COR**, **EXT-PM**, and **EXT-Lease Broker Contractor**.

Note: The assigned Project Manager listed in the Roster section of the project's details page will be the first person to have access to the project. The PM will need to assign additional PMs, CORs, or external users who to assist with populating the Project Directory app.

Companies can be added to the Project Directory, and everyone that is added to the **Team Contact's** section will be automatically assigned the **Default Group(s)** that are selected for the Company.

1. While in the Project Directory app, click on the **Companies** sub-app.
2. Click **NEW**.



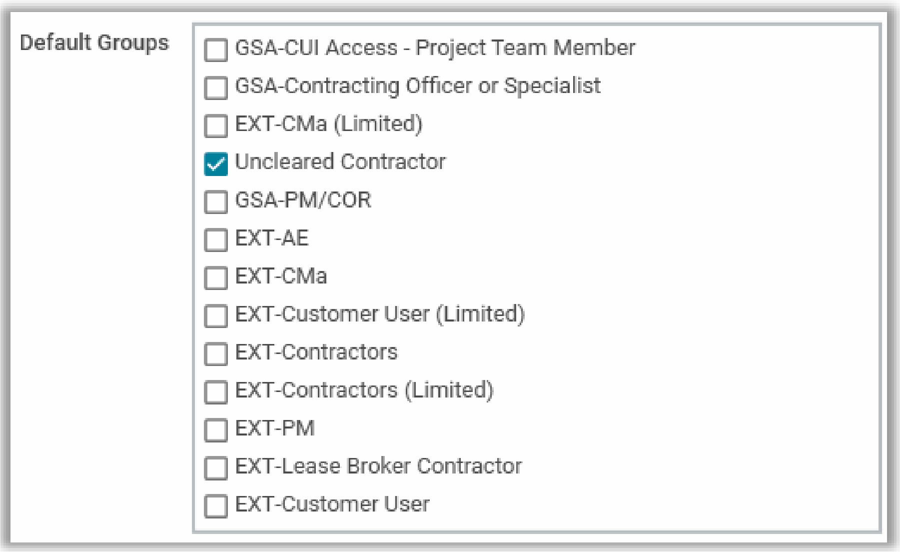
Details Section

3. Select a company from the **Name** field drop-down list. If applicable, the **Office**, **Address**, **Phone Number**, and **Fax Number** will auto-populate.

   Note: The company must exist in the Kahua Contacts app prior to being added to the Project Directory.

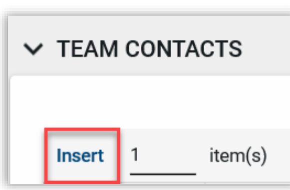
4. If applicable, fill out the **Status on Project**, **CSI Code**, **Project Role**, **Project Function**, and any additional **Notes**.
5. Select the appropriate **Default Group**. If the group is not available, please contact your Regional Kahua Program Manager (KPM).

   Note: If the user is an Uncleared Contractor, please select the **Uncleared Contractor** permission group. For more information about the differences between permission groups, please refer to the GSA Kahua Security Matrix or, if applicable, the Leasing Security Permissions Crosswalk.



Team Contacts

6. Click the **Insert** button to add the appropriate number of Team Contacts to the list.



7. Select the contact(s) from the **Name** field drop-down list.
8. If applicable, select the **Contact Team Role** and enter any **Project Notes** for each

contact.

9. Once all updates have been made, click the **Save / Close** button at the bottom of the form.

Resources

For additional help with Kahua applications, you can access the instructor-led training calendar, self-paced videos, and Quick Reference Guides (QRGs) from this link: Training: Project Management tool | GSA

Related QRGs

GSA Kahua Security Matrix
Leasing Security Permissions Crosswalk