Kahua Quick Reference Guide
Project Directory

Project Lifecycle Applicability

About Project Directory

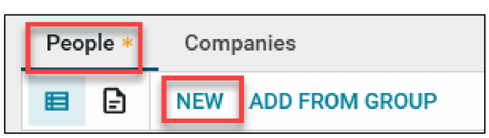
The Project Directory app lists the Companies and People on the project team and their roles, function, and status. The Project Manager, Project Sponsor, Property Facility Manager, and Contracting Officer are not automatically copied from the Project Details section of the Projects app. Therefore, they need to be added to the Project Directory along with all other team members.

In this app, Group Permissions can be assigned to project level team members such as external users, additional PMs, and CORs.

Create a Project Directory Record from the People Sub-App

This action is typically executed by the following roles: **GSA-Regional KPM, GSA-Regional Manager**, or **GSA-PM/COR**.

1. Open the project using Project Finder on the left-hand navigation panel.
2. Select **Project Directory** from the App Launcher.
3. Click **NEW** from the People sub-app.



4. Select the contact person in the **Name** field.

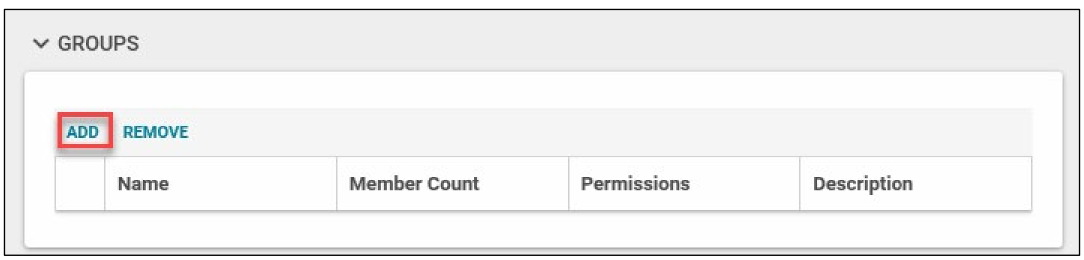
Note: The contact must exist in the Kahua Contacts app prior to being added to the Project Directory.

5. Select the **Contact Team Role**.
6. Select the contact's **Status on Project**.
7. Fill in the appropriate values for other fields, if needed.
8. Attach any supporting documentation to the **References** section.
9. Once all updates have been made to the Project Directory record, click the **Save / Close** button at the bottom of the form.

Assign Group Permissions

Once an additional PM, COR, or External User has been added to the Project Directory, the user can be added to the appropriate permission groups from the **Groups** section of the record in read-only mode. The Groups section does not appear when the record is in Edit mode.

10. Open the Contact Person's record in the People sub-app to read-only.
11. In the Groups section, click **ADD**.



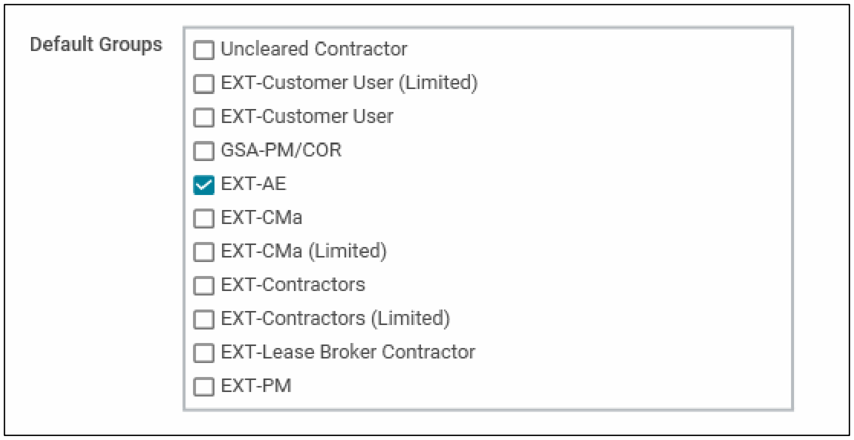
12. Select the appropriate Group(s). If the group is not available, contact your KPM and request that it be added.

13. Click the **Add** button.

Create a Project Directory Record from the Companies Sub-App

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

1. Switch to the **Companies** sub-app.
2. Click **New**.
3. Select a company from the **Name** field drop-down list.
4. Select the appropriate **Default Group**.



5. Click on the **Insert** button to add the appropriate number of Team Contacts to the list.
6. Select the contact(s) from the **Name** field drop-down list.
7. Select the **Contact Team Role** for each contact.
8. Enter any project **Notes** needed for each contact.
9. Once all updates have been made to the **New Company** record, click the **Save / Close** button at the bottom of the form.

Resources

For more help with this or any other Kahua application, you can access the Calendar for instructor-led training, self-paced videos, or additional Quick Reference Guides (QRGs) from this link: [Training: Project management tool | GSA]

Related QRGs

- Groups – Override EXT Groups for help with making the project level groups available for assigning to the project team.
- Reporting for help with printing project reports.
- References for help with uploading supporting documents to the record.