Kahua Quick Reference Guide
Project Directory

About Project Directory

The Project Directory application allows the Project Manager to assemble a list of contacts that need access to the project and assign them to the appropriate Security Group. The Project Directory also provides visibility into the project team, displaying the Team Role each contact plays in the project as well as their Status on the Project.

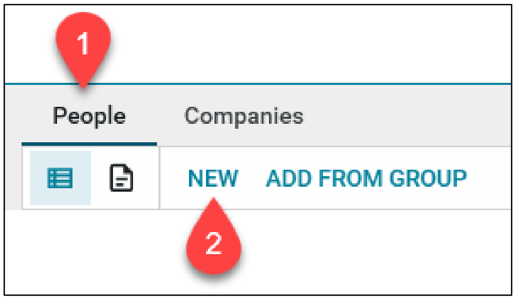
Navigate to the Project Directory App

1. Open the project using Project Finder on the left hand navigation panel.
2. Select **Project Directory** in the Other section of the App launcher.

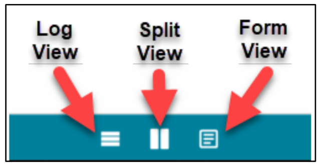
Create a Project Directory Record

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

1. Click on the People sub-app.
2. Click **NEW** to create a new Project Directory record.



Note: Use the three focus buttons in the bottom blue bar to adjust your form view if necessary.



Details Section

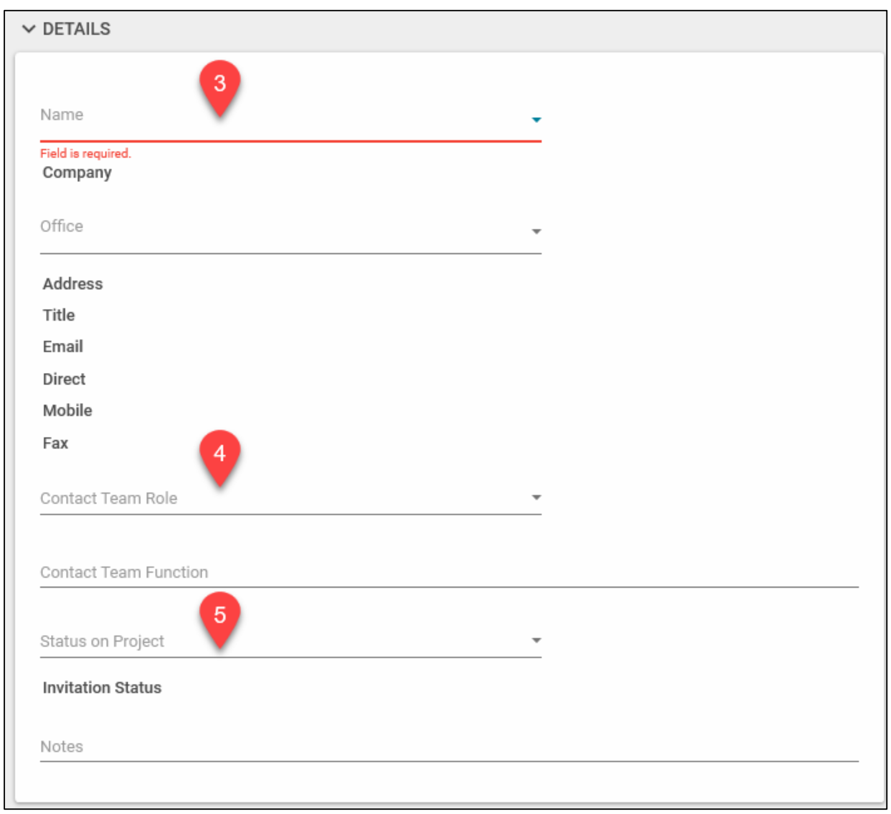
3. Enter the **Name** of contact that needs to be added to the Project Directory.

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

   Note: The company associated with this contact will populate automatically when the new Project Directory entry is saved.

4. Select the role that the contact will serve on the project in the **Contact Team Role** field dropdown list.
5. Select the appropriate status for the contact from the **Status on Project** field dropdown list.
6. Fill in the appropriate values for other fields if needed.

   Note: When the new record is saved, the Invitation Status will be displayed.



References Section

7. Attach any supporting documentation such as photos or pdf files by clicking **UPLOAD** or **ADD KAHUA DOC**, navigating to the appropriate file, clicking **Open**, adding **Comments**, and clicking **OK**.
8. Click the **Save** button to complete the creation of the Project Directory Record.

Action Buttons

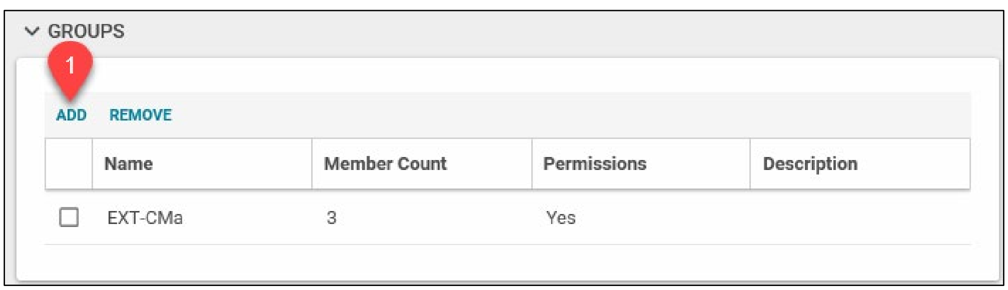
9. Once all updates have been made to the Project Directory record, click the **Save / Close** button at the bottom of the form.

Once the new People record has been saved, the contact can be added to the appropriate security Groups in the Groups section.

Note: The Groups section does not appear until after the record is saved.

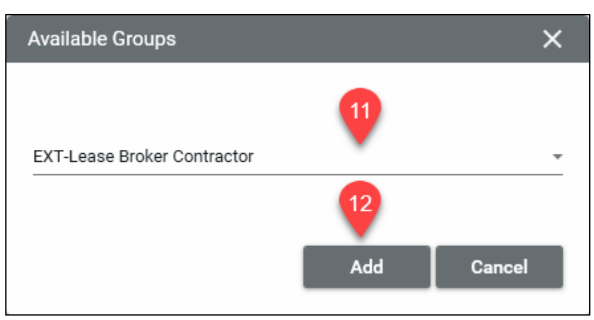
Groups Section

10. Click the **ADD** button to add a new row to the Groups list.



11. Select the appropriate group from the dropdown list of available groups.
12. Click the **Add** button.

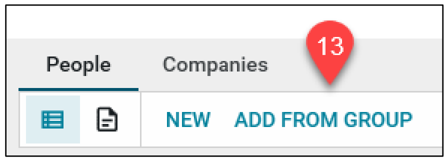
    Note: Adding security Groups to the People record does not require re-saving the record. It is automatically updated.



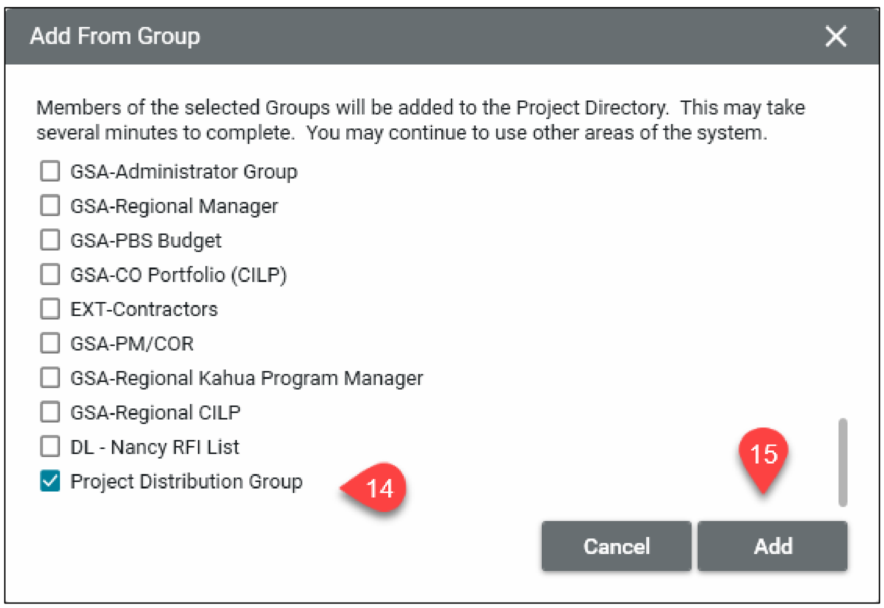
Add from Groups Option

A distribution group or a security group can be used to add a batch of contacts contained within that group to the People sub-app all at once.

13. Click the **ADD FROM GROUP** button in the Options Bar at the top of the screen.



14. Select the groups containing the contacts that you would like to add to the Project Directory
15. Click the **Add** button.

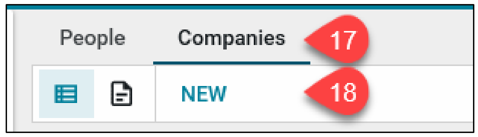


16. Update the newly added contacts using steps 10-12 so that they have the group memberships needed.

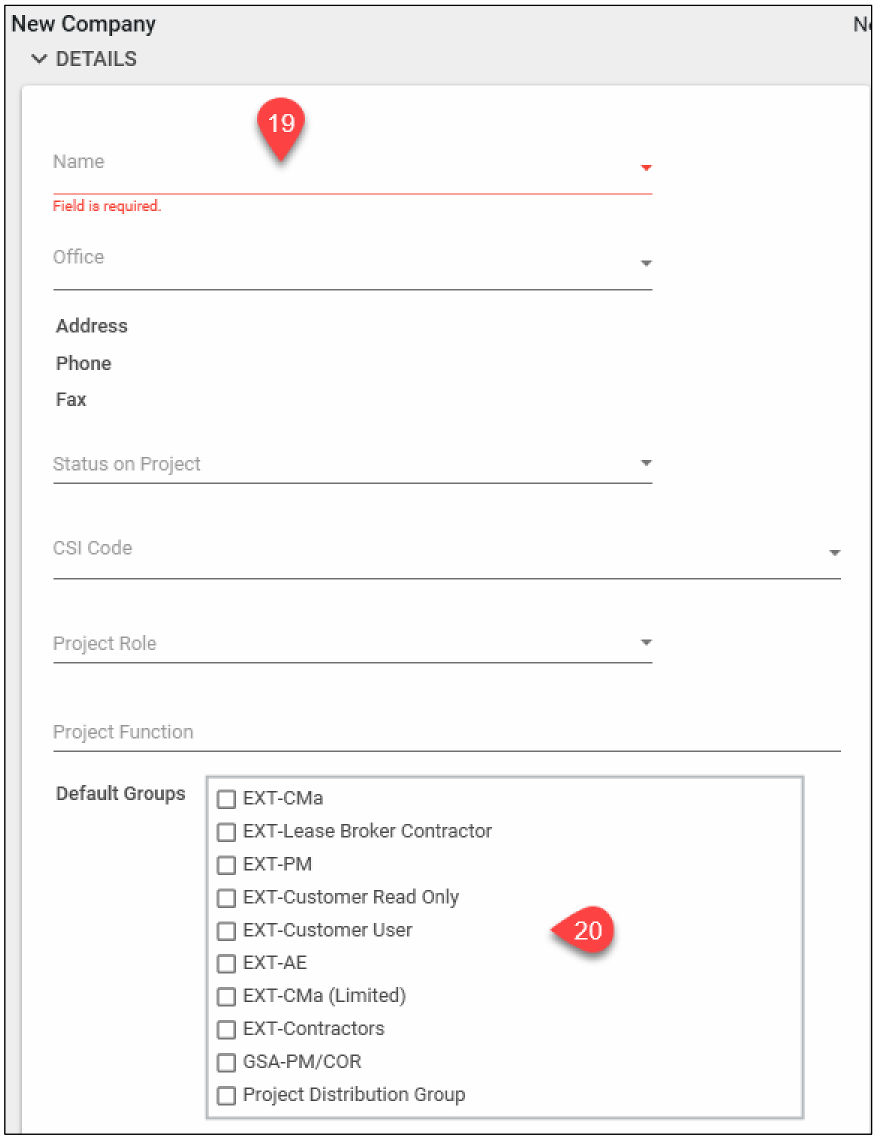
Companies Sub-App

Companies can be added to the project directory and all contacts within that company will be automatically added to the default group(s) that are selected when the company is added.

17. Click on the **Companies** sub-app.
18. Click **New**.

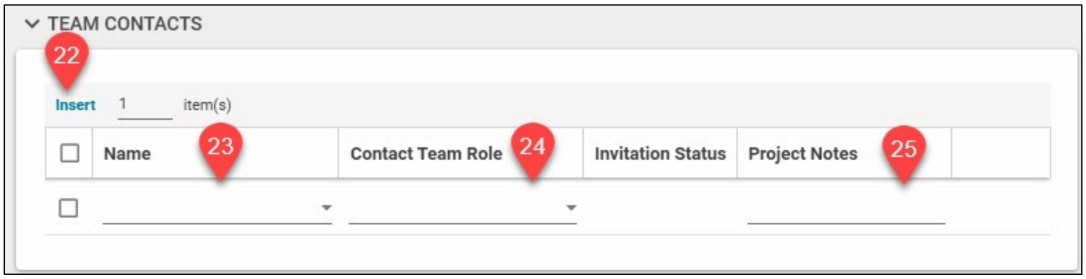


19. Select a company from the Name field dropdown list.
20. Select the appropriate Default Groups.
21. Update any additional fields for the **New Company** record.



Team Contacts Section

22. Click on the **Insert** button to the appropriate number of Team Contacts to the list
23. Select the contact(s) from the **Name** field dropdown.
24. Select the **Contact Team Role** for each contact
25. Enter any project **Notes** needed for each contact.



26. Update any newly added contacts from the New Company using steps 10-12 so that they have the group memberships needed.

Action Buttons

27. Once all updates have been made to the **New Company** record, click the **Save / Close** button at the bottom of the form.