

Kahua Quick Reference Guide

Project Directory

Project Lifecycle Applicability



About Project Directory

- [Create a Project Directory Record from the People Sub-App](#)
- [Create a Project Directory Record from the Companies Sub-App](#)

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

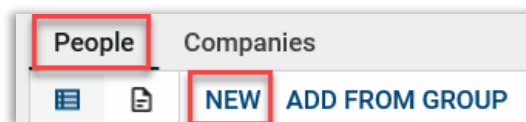
When a project is created, the Project Manager, Project Sponsor, Property Facility Manager, and Contracting Officer are not automatically copied from the Project Details section of the Projects app. Therefore, they need to be added to the Project Directory along with all other team members. In this app, Group Permissions can be assigned to project level team members such as additional PMs, CORs, or external users.

There are two methods to adding a Contact to the Project Directory: [using the People Sub-App](#) or using the [Companies Sub-App](#).

Create a Project Directory Record from the People Sub-App

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

1. Open the project using Project Finder in the Launch Bar.
2. Select **Project Directory** from the Apps 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** and the **Contact Team Function**, if desired.
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.

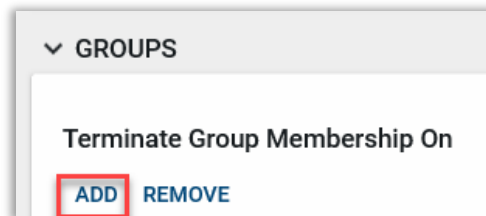
Assign Group Permissions

If a user has been added to the Project Directory that needs elevated access such as an additional PM, a COR, or an External User, the user should be added to the appropriate permission groups from the **Groups** section of the record in read-only mode.

Important: If the user does not have a security clearance, they may ONLY be added to the Uncleared Contractor group. No additional permissions may be granted.

Note: The Groups section does not appear when the record is in Edit mode.

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

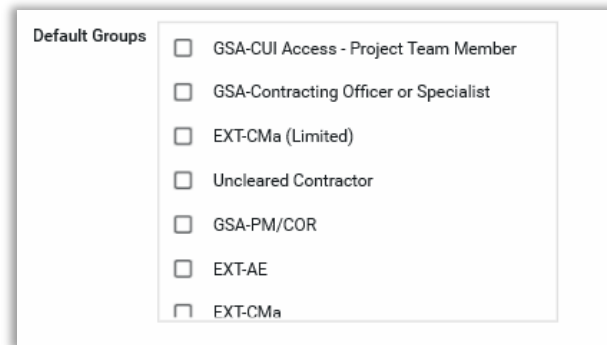


12. Select the appropriate Group(s). If the group is not available, contact your Kahua Program Manager and request that it be added.
13. Click the **Add** button.

Create a Project Directory Record from the Companies Sub-App

Companies can be added to the Project Directory, and everyone that is 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**.



Default Groups

- GSA-CUI Access - Project Team Member
- GSA-Contracting Officer or Specialist
- EXT-CMa (Limited)
- Uncleared Contractor
- GSA-PM/COR
- EXT-AE
- EXT-CMa

5. In the Team Contacts section, enter the desired number of Team Contacts to add to the list, and click the **Insert** link.
6. For each team contact, 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 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

[Reporting](#)
[References section within applications](#)