

## Project Directory

The Project Directory is the place where all business and contact information for your project can be stored.

[Add Existing Contacts to the Directory](#)

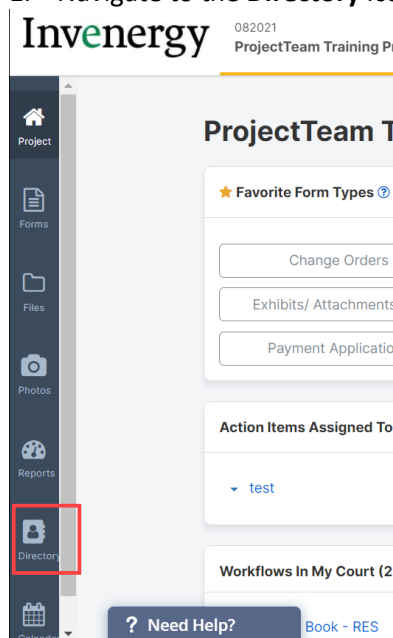
[Create or Add New Businesses](#)

[Create New Contacts](#)

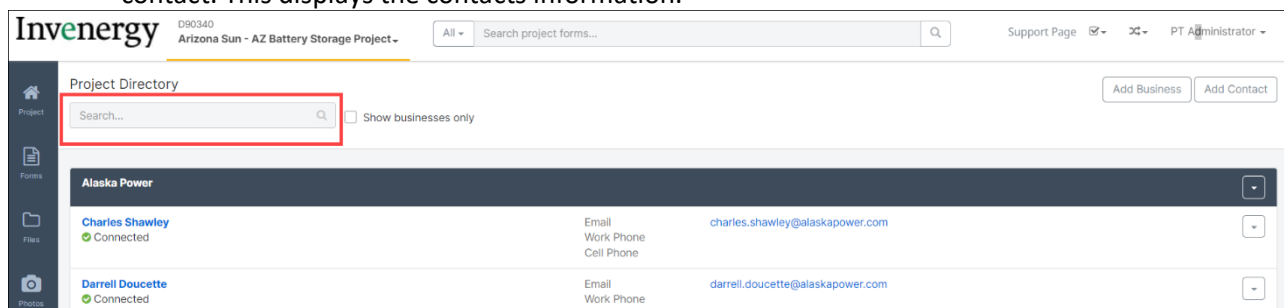
[Invite a Contact to the Project](#)

### Add Existing Contacts to Your Directory

1. Navigate to the **Directory** icon on the left navigation pane.



2. A list displays, which is unique per company and shows all businesses and contacts that your company has decided to keep track of.
3. At the top of the Project Directory, you will see a search bar allowing to quickly search for a contact. This displays the contacts information.



4. To add a member, in the upper right corner, click the **Add Contact** button.

Alaska Power		
<b>Charles Shawley</b> Connected	Email: charles.shawley@alaskapower.com Work Phone Cell Phone	
<b>Darrell Doucette</b> Connected	Email: darrell.doucette@alaskapower.com Work Phone Cell Phone	

5. Select a **Business Name** to add one or more team members and click the **Add Existing** button.

Business Name	Project Role
<input type="radio"/> ECI	
<input type="radio"/> Powin	
<input type="radio"/> RRC Power Solutions	
<input type="radio"/> RES Group	
<input checked="" type="radio"/> Alaska Power	
<input type="radio"/> Arizona Public Service	
<input type="radio"/> Power Electronics	Subcontractor
<input type="radio"/> Simpson Engineering LLC	

6. Use the search field to find the team member(s) or scroll through the list. Click the **checkbox** beside each name and click the **Add Existing** button.

Full Name	Job Title
<input type="checkbox"/> Lee Tatum	Site Construction Manager
<input type="checkbox"/> Reona Yamaguchi	Project Engineer
<input type="checkbox"/> William Nipp	Construction Manager

## Create or Add New Businesses

1. While in Project Directory, click the **Add Business** button.

The screenshot shows the Invenenergy Project Directory interface. At the top, there's a header with the Invenenergy logo, project details (D90340, Arizona Sun - AZ Battery Storage Project), a search bar, and user information (Support Page, PT Administrator). On the left is a sidebar with icons for Project, Forms, Files, and Photos. The main content area is titled 'Project Directory' and contains a search bar and a checkbox 'Show businesses only'. Below this is a table listing businesses. The 'Add Business' button is highlighted with a red box.

Alaska Power	
Charles Shawley Connected	Email: charles.shawley@alaskapower.com Work Phone Cell Phone
Darrell Doucette Connected	Email: darrell.doucette@alaskapower.com Work Phone Cell Phone

2. Use the **Search** box to find an existing company or click the **Create New** button to add a new company.

The screenshot shows the 'Add businesses to project' dialog box. It has a search bar and a 'Create New' button, both highlighted with red boxes. Below these is a list of businesses with checkboxes and business types. At the bottom are 'Cancel' and 'Add Existing' buttons.

Business Name	Business Type
<input type="checkbox"/> (GPM) Green Power Monitor	
<input type="checkbox"/> American Electric Power	
<input type="checkbox"/> American Fire Technologies	Other Consultant
<input type="checkbox"/> American Transmission Company	
<input type="checkbox"/> American Transmission Company (ATC)	Electrical Engineer
<input type="checkbox"/> Barr Engineering	
<input type="checkbox"/> Barton Malow Company	Contractor
<input type="checkbox"/> Bianchi Electric	

3. In the **New Business** page, fill out the appropriate information and click the **Save** button.

The screenshot shows the 'New Business' form. The 'Business Name' field is highlighted with a red box and contains the text 'ABC Construction'. The 'Save' button is also highlighted with a red box. Other fields include 'Business Type', 'Company Website', and 'Headquarters Location'.

Project Directory / New Business

New Business

Business Name: ABC Construction

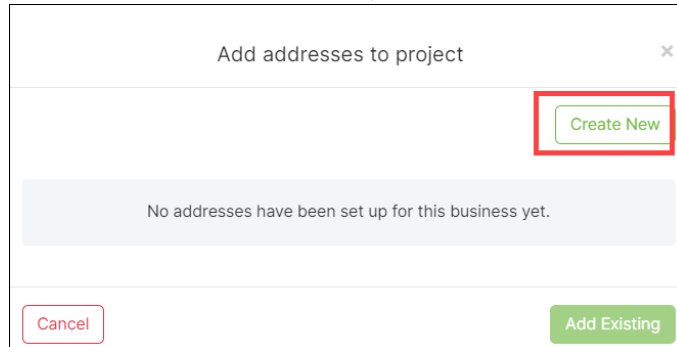
Business Type: [Dropdown]

Company Website: [Text Field]

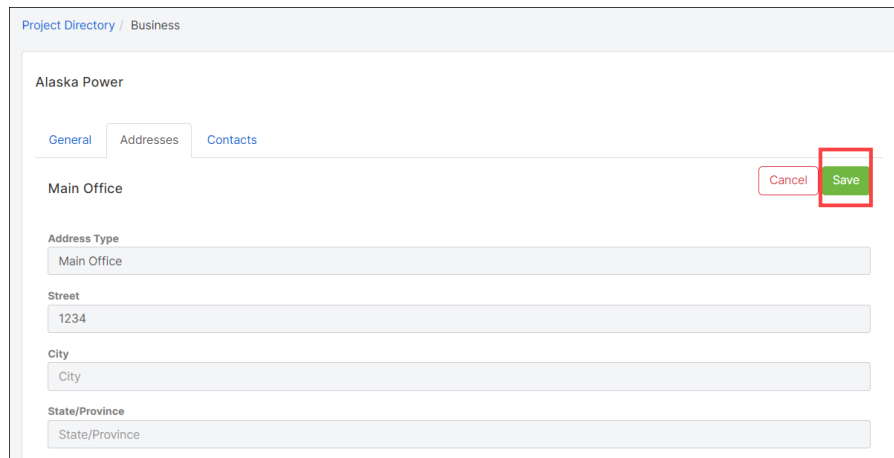
Headquarters Location: [Text Field]

4. Once a new business is saved, you should add the business address. Click on the **Addresses** tab of the business contact and click **Add**.

5. To set a new address, click on **Create New**.



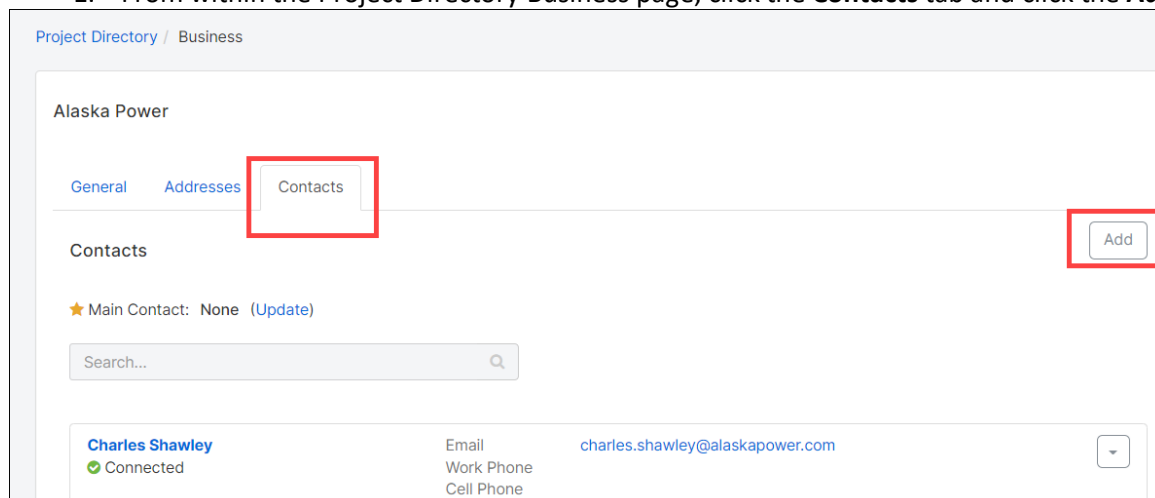
6. Fill out the complete **address** information. Click **Save**. Doing so allows this companies address to populate in within a form.

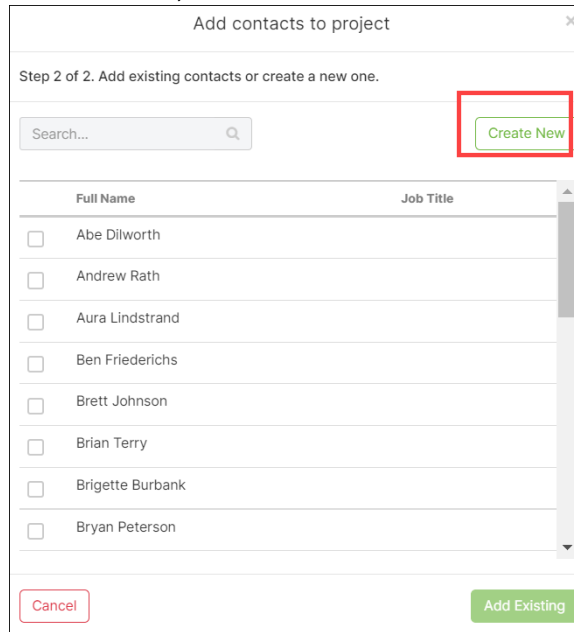


## Create New Contacts

After creating a new business, you can add contacts.

1. From within the Project Directory Business page, click the **Contacts** tab and click the **Add** button.



2. Next, click **Create New**.

Add contacts to project

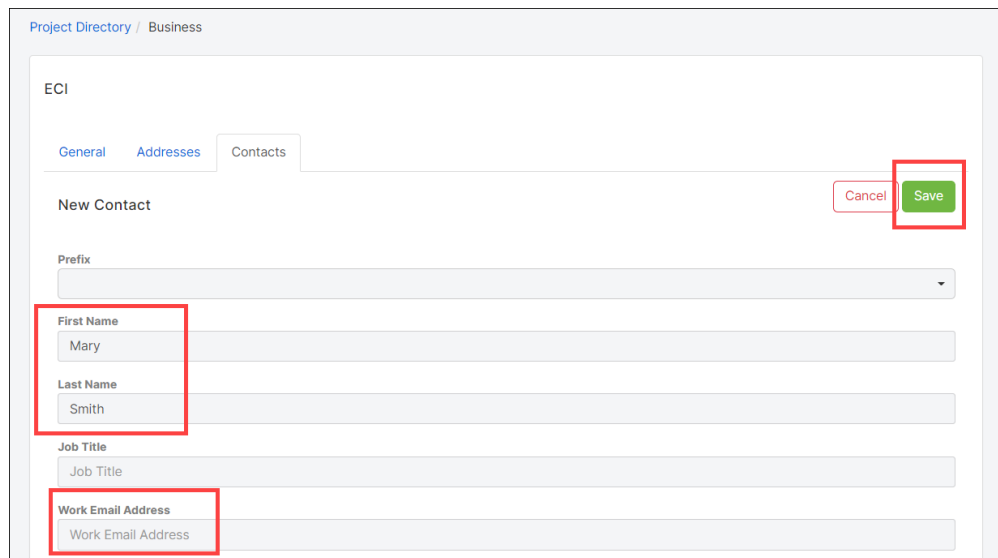
Step 2 of 2. Add existing contacts or create a new one.

Search...

Create New

	Full Name	Job Title
<input type="checkbox"/>	Abe Dilworth	
<input type="checkbox"/>	Andrew Rath	
<input type="checkbox"/>	Aura Lindstrand	
<input type="checkbox"/>	Ben Friederichs	
<input type="checkbox"/>	Brett Johnson	
<input type="checkbox"/>	Brian Terry	
<input type="checkbox"/>	Brigette Burbank	
<input type="checkbox"/>	Bryan Peterson	

Cancel Add Existing

3. On the Contacts tab, fill out the appropriate information and click the **Save** button.

Project Directory / Business

ECI

General Addresses Contacts

New Contact

Cancel Save

Prefix

First Name

Mary

Last Name

Smith

Job Title

Job Title

Work Email Address

Work Email Address

## Invite a Contact to the Project

1. After adding a company and contact to the directory, press the **Invite** button below the contact's name:
2. A modal window may appear asking which **Share Group** that new team member should be added to. Be sure to carefully select the appropriate Share Group.

Add user to share group

Choose share groups the user should get added to once they join the project.

Search...

share group(s) if appropriate.

<input checked="" type="checkbox"/>	(S) Contractor: EXT	This share group provides external users with the necessary field level security (S) for their role. It should be used in conjunction with the proper workflow (WF) share group(s) if appropriate.
<input type="checkbox"/>	(S) Cost Estimator	
<input type="checkbox"/>	(S) Customer: EXT	This share group provides external users with the necessary field level security (S) for their role. It should be used in conjunction with the proper workflow (WF) share group(s) if appropriate.
<input type="checkbox"/>	(S) Developer	
<input type="checkbox"/>	(S) Developers: INT	(S) Developers: INT

Cancel Send Invite

If you are uncertain of the Share Group titles, contact ProjectTeam support at [ProjectTeam@invenergy.com](mailto:ProjectTeam@invenergy.com)