Kahua Quick Reference Guide
IRIS, RETA, and Manual Estimates/Budgets

About IRIS, RETA, and Manual Estimates/Budgets

Navigate to Estimates/Budgets
Create a New Estimate
Accept Estimate Items Left in Draft Status
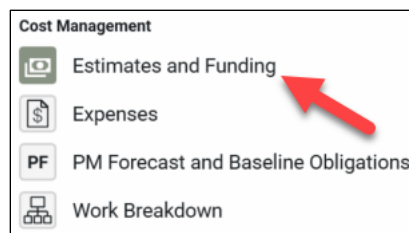Create a New Budget
Update the Budget
Accept an IRIS or RETA Intake Item
View Estimates and Budgets in Work Breakdown

The **Estimates/Budgets** tool is a tab of the **Estimating and Budgeting** app where IRIS and RETA estimates are integrated with Kahua and where users can manually enter estimates. Accepted estimate items can be merged into an approved budget and are both tracked in the Work Breakdown app.

Items in each estimate can be accepted, which will apply them to the Summary. Items in the Summary appear in the Estimated column of the Funding Budget section of the Work Breakdown app. Items in the Summary are then merged into an approved budget. Budget items appear in the PM Budget column of the Funding Budget section and in the Variances section of the Work Breakdown app.

Navigate to Estimates/Budgets

1. Open the project using Project Finder on the left side bar.
2. Select **Estimates and Funding** from the App launcher.

3. Select the **Estimates/Budgets** tab below the project name

Create a New Estimate

This activity is typically created by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-Regional KPM, GSA-Regional Manager, GSA-PBS Budget, GSA-PM/COR,** and **EXT-PM**.

1. In the log toolbar, click **NEW ESTIMATE** to open the Estimate form view.
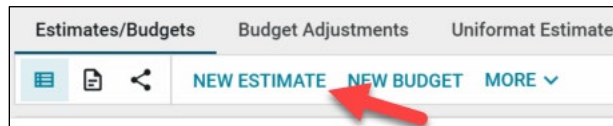
   Note: Use the three focus buttons in the bottom blue bar to adjust your form view if necessary.
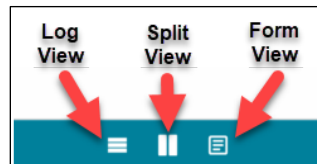

Details Section

2. The number and date will auto populate, but you can change these fields if necessary.
3. Enter a **Subject** in the required field.
4. Enter a **Description** if necessary.
5. Enter any **Notes** if necessary.

Items Section

6. Click **Insert**. If there are multiple Items, change the number 1 to the number of Items, then click **Insert**.
7. The **No.** and **Status** columns auto-populate.
8. Click the flyout button next to the new line item to open the **Estimate - Items** window.
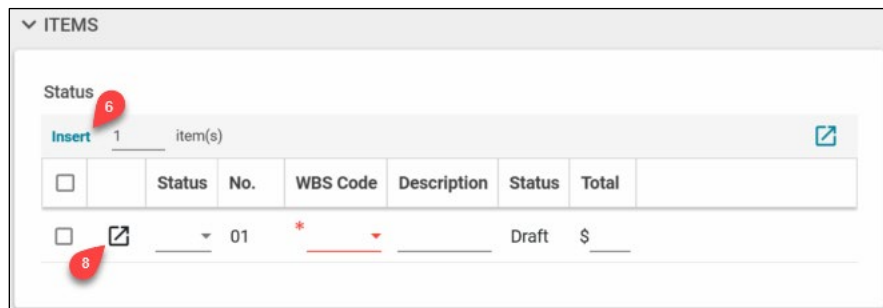
9. Select the required **WBS Code**, which will auto-populate a **Description** that can be changed if necessary.
10. Enter a value for the **Total** and any applicable **Notes** or **Comments**.

11. If you enter multiple items in step 6, click the **Next** and **Previous** buttons to fill out the information for each line item.
12. Click the **Done** button in the bottom left corner to close the window.
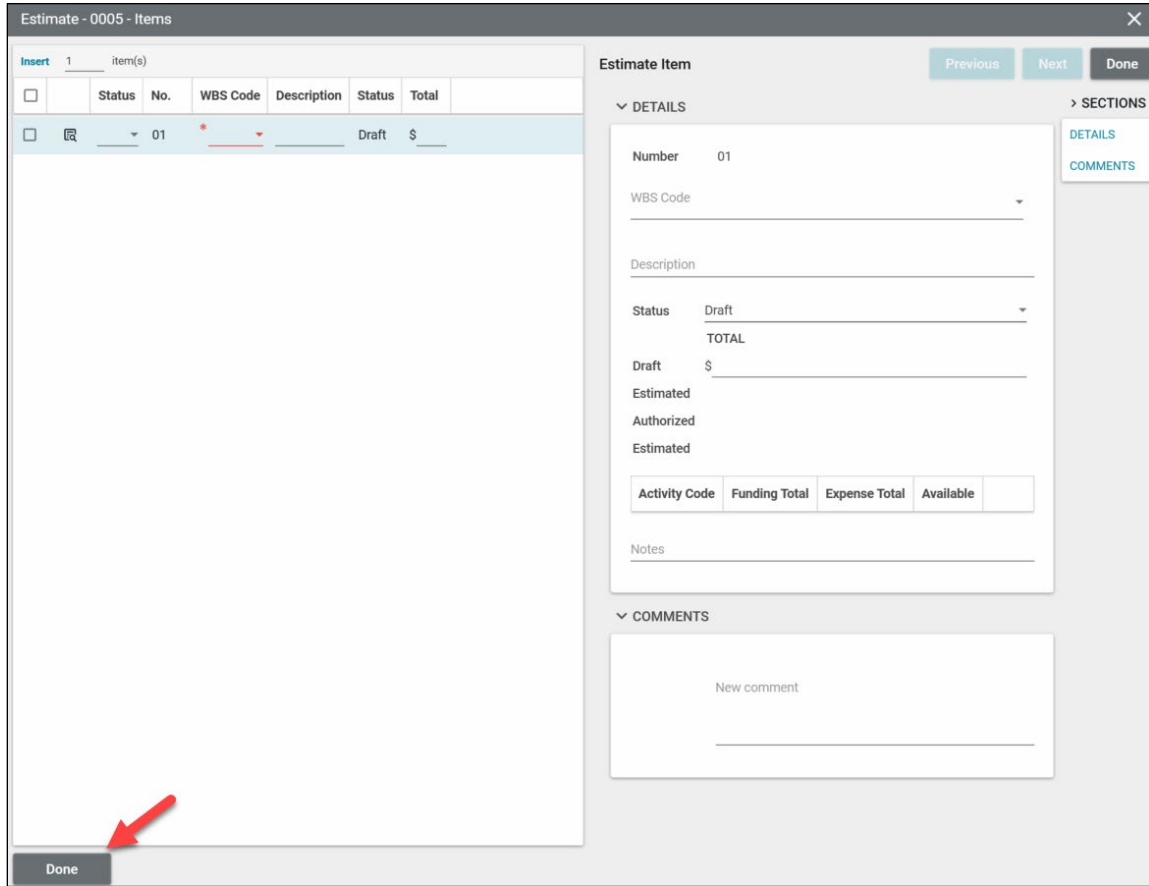
13. Select a status for each Estimate Item by clicking the drop-down list.
    a. Selecting **Accept** will change the status of the Estimate Item to Accept. Only estimates with an Accept status can be merged into the Summary Estimate.
    b. Selecting **Ignore** will leave the Estimate Item with a Draft status and will not appear in the Summary Estimate until it is changed to Accept.
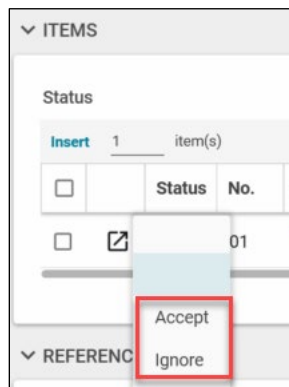
References Section

14. 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**.
15. Click the **Save/Close** button to complete the creation of the new estimate.
16. Click **Merge To Summary** to merge Estimates Items with an Accept status to the **Summary** shown in the log. Estimate Items with an Ignore status will remain in draft.
    a. If all Estimate Items need to be accepted and shown in the Summary, click **Accept All And Merge To Summary**.

    Note: To accept Estimate Items left in the draft status after the initial estimate submission, please refer to the section below titled **Accept Estimate Items Left in Draft Status**.

Accept Estimate Items Left in Draft Status

This activity is typically completed by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-Regional KPM, GSA-Regional Manager, GSA-PBS Budget, GSA-PM/COR,** and **EXT-PM**.

1. Navigate to the **Estimates/Budgets** tab within the **Estimates and Funding** application.
2. Click on the Estimate you wish to edit from the log.
3. If all Estimate Items need to be accepted and shown in the Summary, click **Accept All And Merge To Summary**.
4. If an individual Estimate Item status needs to be changed:
    a. Click **Edit** in the log toolbar.
    b. In the **Items** section, change the status of the Estimate Item from Ignore to **Accept**.
5. Click the **Save/Close** button then click **Merge To Summary**.
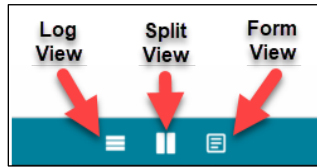6. Notice the new total of the Summary in the log.

Create a New Budget

This activity is typically created by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-Regional KPM, GSA-Regional Manager, GSA-PBS Budget, GSA-PM/COR, EXT-PM**.

1. In the log toolbar, click **NEW BUDGET** to open the Budget form view.
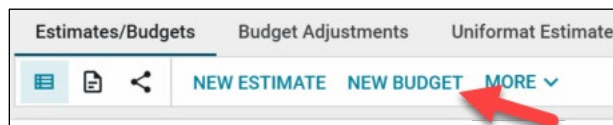
Note: Use the three focus buttons in the bottom blue bar to adjust your form view if necessary.

Details Section

2. The number and date will auto populate but can change if necessary.
3. Enter a **Subject** in the required field.
4. Enter a **Description** if necessary.
5. Enter any **Notes** if necessary.
6. Click the **Save/Close** button to complete the creation of the new approved budget.
7. Click **Merge Summary Estimate To Approved Budget** to add the approved Estimate Items shown in the Summary to the approved budget.
8. The total value of the Summary should match the total value of the approved budget.

Update the Budget

These activities are typically completed by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-Regional KPM, GSA-Regional Manager, GSA-PBS Budget, GSA-PM/COR,** and **EXT-PM**.

Adding New Estimate Items to Approved Budget
1. Navigate to the approved budget in the **Estimates/Budgets** tab.
2. Open the approved Budget record.
3. Click **Merge Summary Estimate To Approved Budget** to add the new approved Estimate Items shown in the Summary to the approved budget.

Breakout Estimate Items in Approved Budget
1. Navigate to the approved budget in the **Estimates/Budgets** tab.
2. Open the approved Budget record.
3. Click **Edit** in the toolbar.
4. In the **Items** section, click **Insert**. If there are multiple Items, change the number 1 to the number of Items, then click **Insert**.
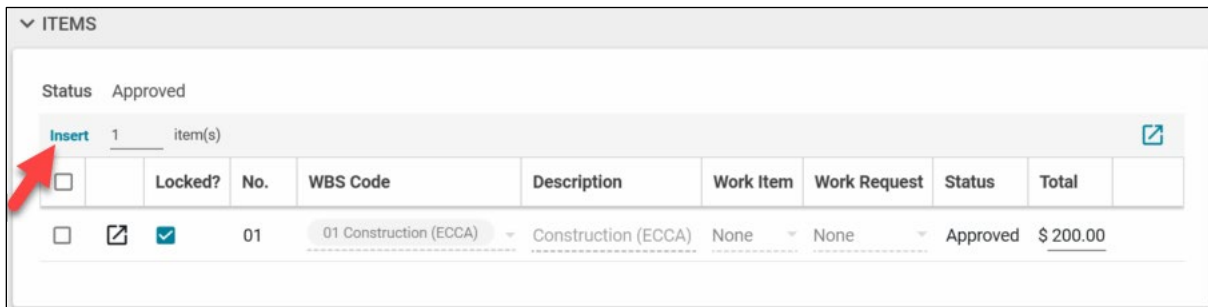
5. For each item row, enter or select the **WBS Code, Description, Work Item** or **Work Request** (if applicable), and **Total**.
6. Verify that the total of the new draft estimate items equals the total of the approved line

item that is being broken out.

7. For the approved line item that is being broken out, change the total to **$0 (zero dollars)**. This will allow the budget total to remain the same.
8. Click the **Save/Close** button when complete.
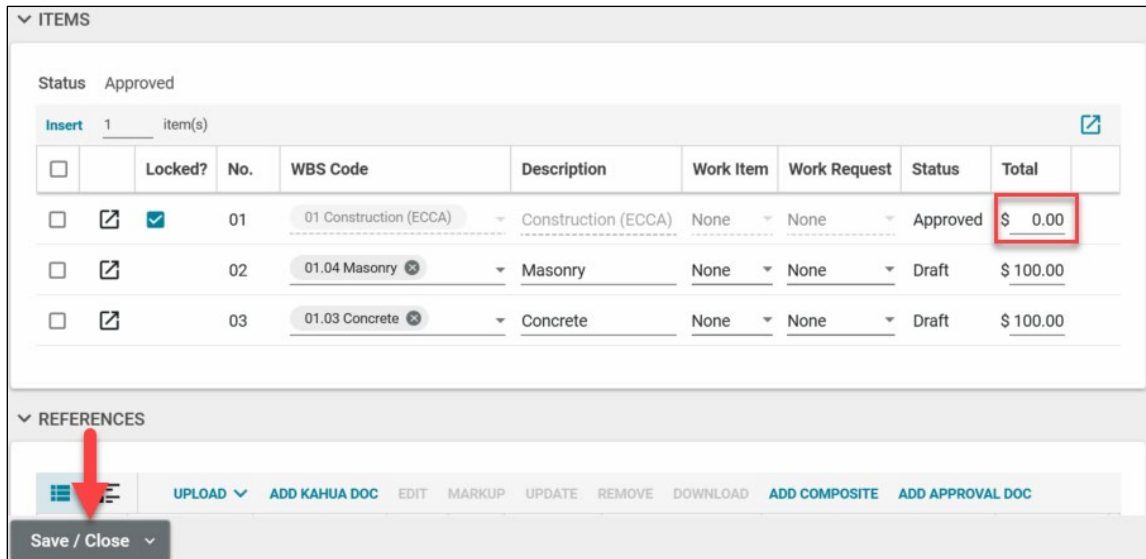
Accept an IRIS or RETA Intake Item

This activity is typically completed by the following roles: **GSA-PM/COR**

When an IRIS or RETA Estimate is integrated into Kahua, a new record will appear in the Estimates/Budgets log view. The first IRIS or RETA intake item will automatically be accepted, appear in the log with a superseded status, and will merge into the Summary. For any additional IRIS or RETA intake items, the Project Manager will receive a notification of a new task in Kahua. The Project Manager will need to review and accept the additional IRIS and RETA intake items to appear in the Summary.

1. Navigate to **Tasks** in Kahua and click on the IRIS or RETA intake item.
2. If an individual intake item needs to be accepted:
   a. Select the appropriate status of **Accept** or **Ignore** for each intake item.
   b. Click **Submit** to merge the intake items with an accept status to the Summary. Intake items with an ignore status will remain with a draft status and can be returned to at any point by re-opening the IRIS or RETA intake item.
3. If all Intake Items need to be accepted and shown in the Summary, click **Accept And Submit All Items**.
4. Notice the new total of the Summary in the Estimates/Budgets log.
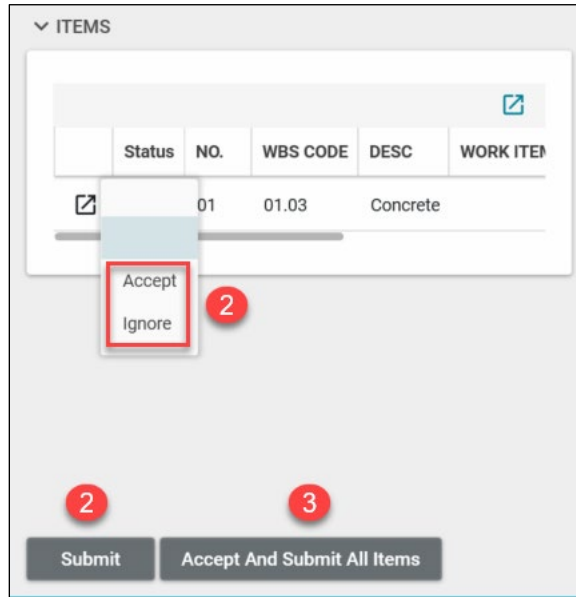
View Estimates and Budgets in the Work Breakdown Structure (WBS)

This activity is typically completed by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-Regional KPM, GSA-Regional Manager, GSA-Regional CILP, GSA-CO Portfolio (CILP), GSA-Measures Manager, GSA-PBS Budget, GSA-PM/COR, GSA-Observer,** and **EXT-PM**.

1. Open the app launcher in the left navigation pane and find the **Work Breakdown** app.
2. Accepted Estimate Items can be found under the **Estimated** column in the Funding Budget section.
3. Budget items appear under the **PM Budget** column in the Funding Budget section. Notice the budget value is included in other calculations in the WBS such as the Variances section.

Note: To learn more about the Work Breakdown app, please make sure to review the Work Breakdown Quick Reference Guide or eLearning video.