Kahua Quick Reference Guide
PM Forecast

Project Lifecycle Applicability

Planning ▸ Execution ▸ Closeout

About PM Forecast

[Create a PM Forecast Record](#)
[Close a PM Forecast Record](#)
[Work Breakdown App Appearances](#)

The PM Forecast application can be used by Project Managers to forecast project costs. Project costs are tracked in the Work Breakdown (WBS) application as Projected Obligations. The application is not intended to show any actual obligated costs.

Note: When the corresponding obligation is integrated into Kahua, the PM Forecast record must be closed to avoid duplicating the amount in the Work Breakdown app calculations.

Create a PM Forecast Record

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

1. Open the appropriate project using Project Finder in the left navigation pane. The project name should now be shown in the top blue bar.
2. Click the App Launcher in the left navigation pane and select **PM Forecast and Baseline Obligations**.
3. To create a new PM Forecast record, click **NEW PM FORECAST** in the log toolbar.

Details Section

4. The **Number** and **Date** will auto-populate but can be changed if needed.
5. Enter the **Description**.

6. If there is a corresponding **Obligation,** select it from the dropdown list. Obligations, or contract awards, are integrated into each project and can be linked before Closing a PM Forecast Record.
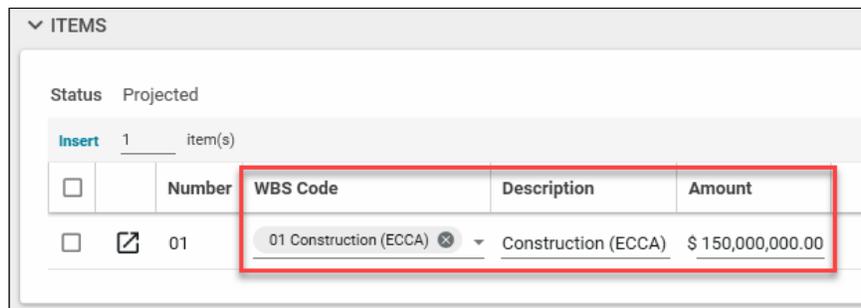7. If necessary, enter any **Notes**.

Dates and Workflow Section

8. The Dates and Workflow section will auto-populate as the record is workflowed.

   Note: When the record is saved, the workflow status will change to Active. When the record is closed, the workflow status will change to Closed and the Date Closed field will auto-populate.

Items Section

9. In the **Items** section, click **Insert** to add a new row.
   a. The **Number** column will auto-populate.
   b. Select a **WBS Code** from the dropdown list.
   c. The **Description** will auto-fill when the WBS Code selected but can be edited.
   d. Enter the forecasted **Amount**.

Comments Section

10. Enter clarifying details in the **New Comment** field.

References Section

11. To add a document that does not exist within the project, click **Upload** and select the file. Multiple documents may be uploaded at one time.
12. To add a document that does exists within the project, click **Add Kahua Doc** and locate the file.
13. When complete, click the **Save / Close** button at the bottom of the window.

Close a PM Forecast Record

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

Note: Once the contract award is made, the PM Forecast record will need to be closed. Closing the PM Forecast record removes the forecasted amount(s) from the **PM Forecast** column and the calculations that include the **Potential Total Obligations** in the Work Breakdown app.

1. From within the appropriate project, navigate to the **PM Forecast and Baseline Obligations** app from the App Launcher.
2. Select the **PM Forecast** record from the log.
3. Obligations, or contract awards, are integrated into each project and can be linked to PM Forecast records. If the corresponding **Obligation** that has not been linked yet, click **Edit** in the top toolbar to select an Obligation from the dropdown list. When complete, click **Save/Close**.
4. Click the **Close** button from the bottom of the record. The workflow status will change to Closed and the Date Closed field will auto-populate. If necessary, the record can be **Reopened**.

Work Breakdown App Appearances

The PM Forecast amount(s) will appear in the **Obligations** section in the Work Breakdown app. In addition to appearing in the PM Forecast column, the forecasted amount(s) is considered a Potential Total Obligation and is included in calculations in the **Variance** section with Potential Total Obligations. Closing or canceling a PM Forecast record removes the amount(s) from the Work Breakdown app.

Resources

For additional help with Kahua applications, you can access the Calendar for Instructor-led training, Self-paced videos and Quick Reference Guides (QRGs) from this link: Training: Project Management tool | GSA

Related QRGs

References
Work Breakdown