



DATA SHEET

KLUSA Add-In for Microsoft Project

In some organizations, Microsoft Office Project Client is an established project planning tool and is e.g. additionally used as a communication and information medium. The KLUSA add-in for MS Project allows easy exchange and comparison of project data between MS Project Client and KLUSA.

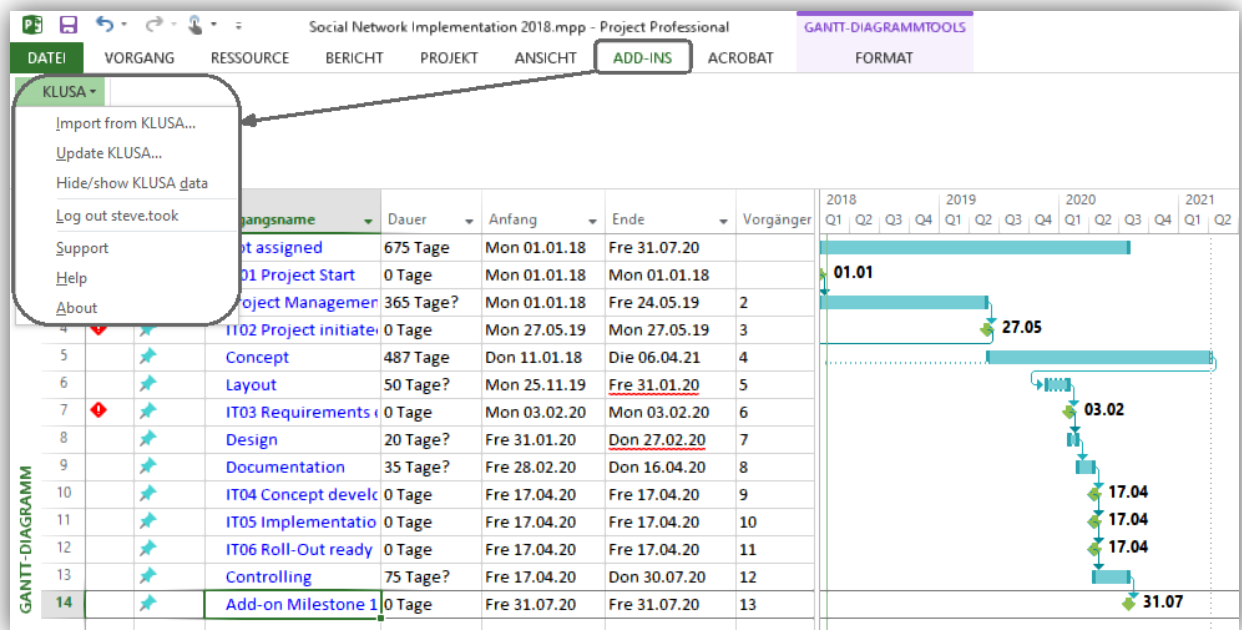
Functions of the KLUSA Add-In

The KLUSA add-in for the MS Project Client supports the following use cases:

- A new MS Project file is created by importing selected project data such as work packages, milestones and their links and general project data from KLUSA.
- Update of the KLUSA project data by re-importing the MS Project file.
- Comparison of the KLUSA project data with the MS project data.

Navigation and handling

The KLUSA add-in in Microsoft Project appears as a separate menu item. The handling is intuitively possible through obvious menu items. Data synchronization must be finally confirmed by the user so that an accidental change of project data in KLUSA is excluded. The add-in remembers the last settings in order to simplify the work steps for future operations.

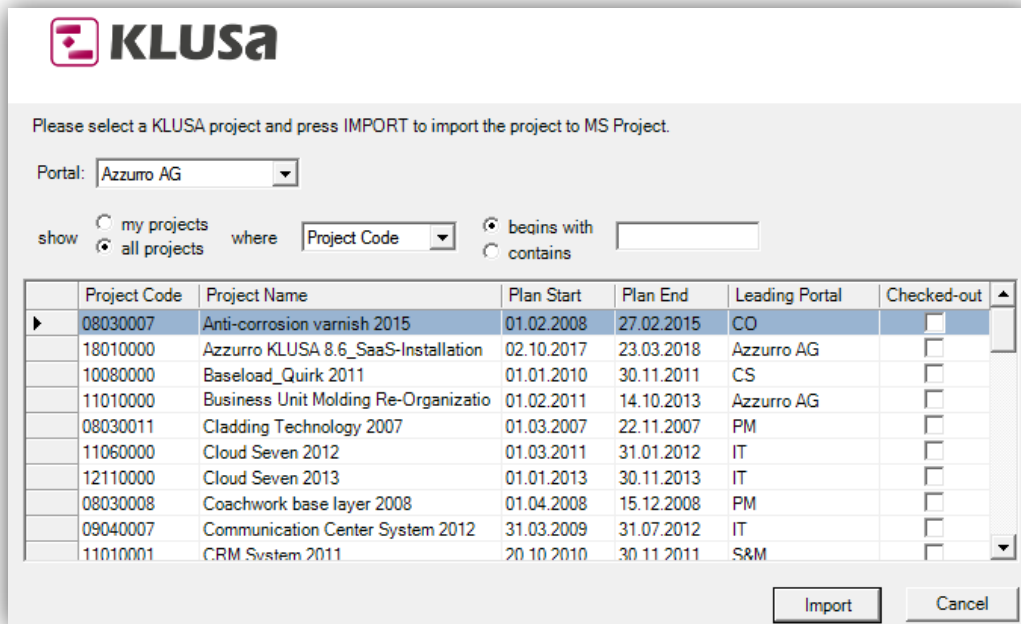


Integration of the KLUSA add-Ins in Microsoft Project

The flexible KLUSA role and rights concept is used for authentication; i.e. authentication is based on the privileges assigned in KLUSA. This ensures that only authorized persons can access KLUSA data according to their roles.

Import of the project plan from KLUSA to MS Project

The Import of the project plan from KLUSA to MS Project is supported by a selection window. The project list only shows projects of the selected portal where the user has at least reading privileges. Practice-oriented filter functionality helps to find the required project.

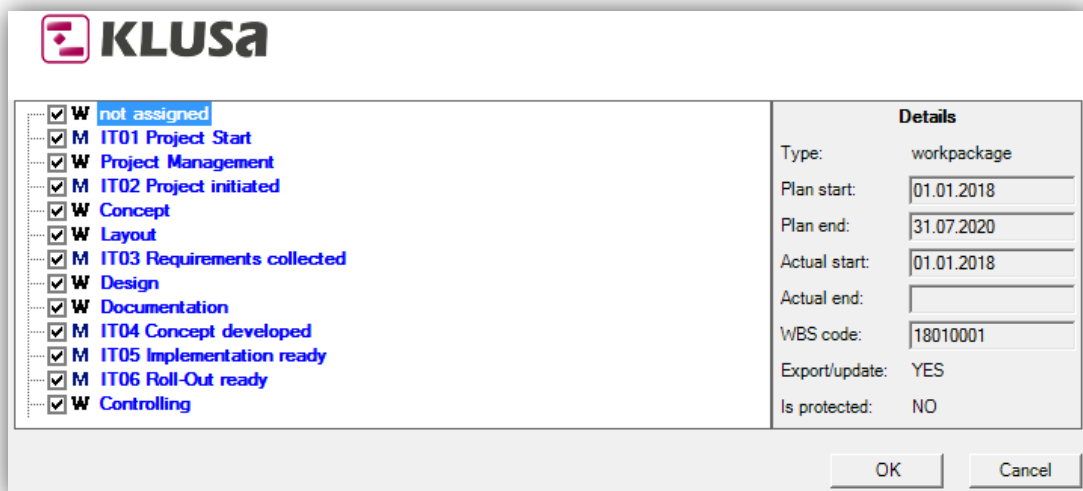


Import of project from KLUSA

Once the import has been completed, you can edit the schedule data in MS Project and this data is locked for processing in KLUSA. This lock can be bypassed when creating the MS Project file or cancelled later in KLUSA with special privilege.

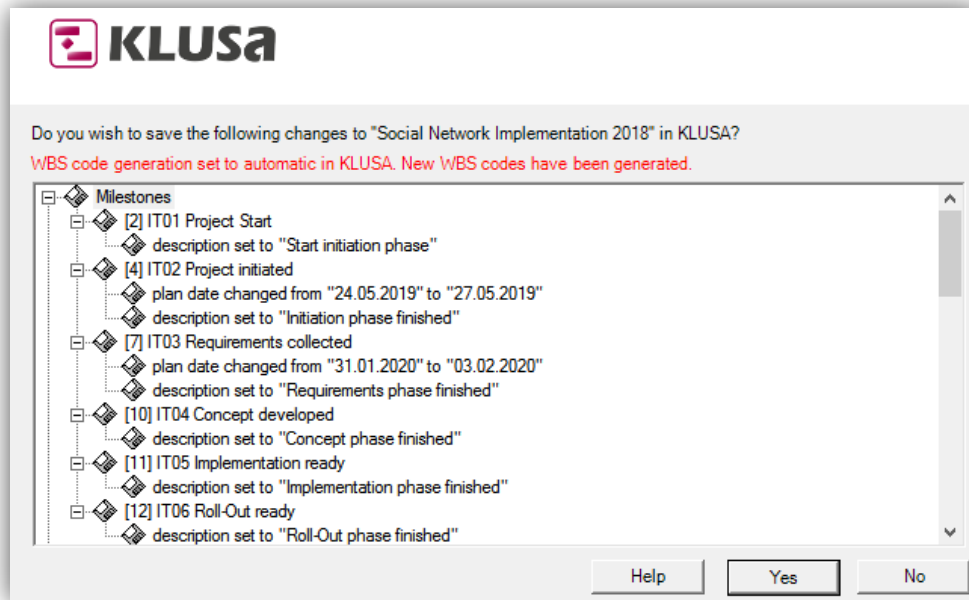
Updating the project schedule from MS Project to KLUSA

When updating the project in KLUSA, the changes and additions (concerning work packages and milestones) in MS Project are synchronized with KLUSA. In the Update window, you can flexibly select the data to be transferred. It is also possible to select single work packages and milestones for this purpose.



Work package and milestone selection

Before saving the changes finally in KLUSA, a report gives an overview of the changes made. You can cancel the transfer to KLUSA at any time. Accidental changes or inconsistent data are excluded thereby.

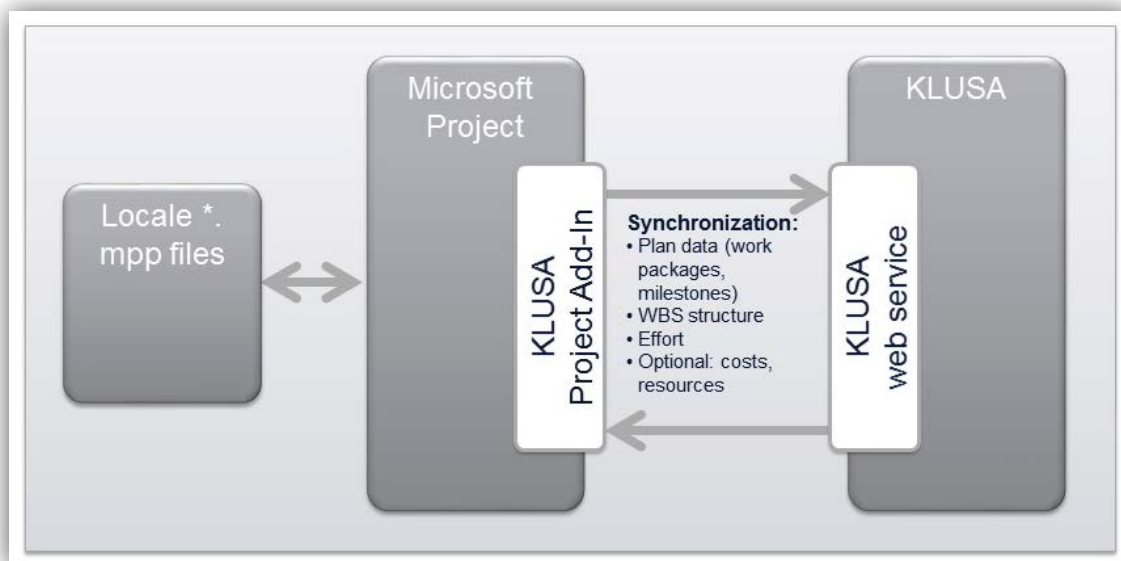


Confirming the selection of work packages and milestones to be transferred

If the changes made in MS Project conflict with KLUSA's business rules, the user will also be informed prior to saving. Saving is only possible if all checks have passed successfully.

System architecture

The KLUSA add-in for MS Project can be delivered as a preconfigured installation package or installed via a central software distribution within the company. For the communication between the KLUSA add-in for MS Project and KLUSA, web services are used.



Schema of the synchronization

Requirements for operation:

- Microsoft Project 2013 or 2016 (32-Bit-Versions only)
- .NET Framework Runtime 2.0 SP1 or higher

Summary

For the practical operation, the KLUSA add-in for MS Project supports the following scenarios:

- Project managers requiring detailed planning for operational project management are planning with MS Project and transfer planning data to KLUSA. The planning master in this scenario is MS Project. After synchronization with an assigned KLUSA project, the data in KLUSA is available for multi-project management and reporting.
- The project manager can exchange project data in MS Project file format with customers or partners. Plan changes agreed with the customer resp. partner can easily be returned to KLUSA so that further planning and controlling can take place in KLUSA.
- The project manager does the initial planning in MS Project, but further project management takes place in KLUSA (resource planning, controlling and tracking change requests during the project period, cost monitoring, reporting, etc.). In this case, MS Project's role as planning master goes over to KLUSA after the initial load.



Project Management Software & Consulting

OPUS Business Solutions GmbH

Landsberger Str. 290
80687 Munich
Germany

Phone +49 89 45229 100
Fax +49 89 45229 399
E-mail info@klusa.com
Web www.klusa.com

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