KLUSA

DATA SHEET

Reporting

Companies using project management will not do without a well-functioning reporting system. Those responsible for multi-project environments that run multiple project portfolios, programs or single projects need accurate and comprehensive reporting information to analyze and manage the project landscape on a continuing basis.
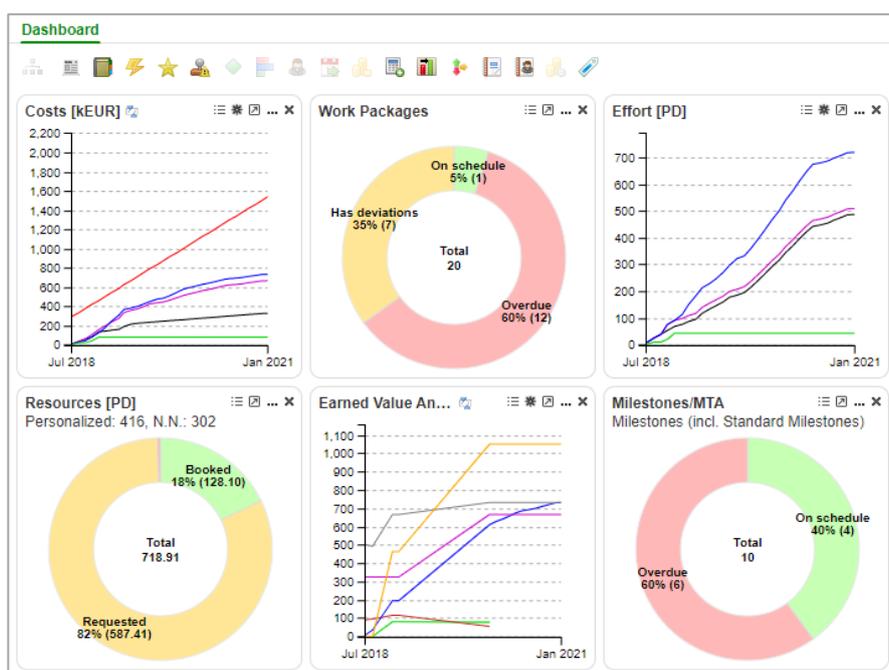
At this point, KLUSA assists with easy and semi-automated reporting by project managers or other project responsibles, as well as with a full range of report generation and output options for project managers, project office staff, and corporate governance.

Presentation and output of reports

- The reports are displayed directly in KLUSA. Information can be filtered, grouped and summarized.
- Available output formats of the reports are PDF or HTML with a flexible, customizable layout.
- Reports in native Microsoft Office formats for Word and PowerPoint. This option is particularly useful if reports need to be edited.
- Data exports in Microsoft Excel format for subsequent detailed analyses and reports.
- KLUSA web services allow the company's in-house reporting system or corporate data warehouse to access KLUSA data.

Direct display of the reports in KLUSA

The reporting options explained in the section above are available for the display of the data directly in KLUSA. The individual project reports with MTA, CTA, EVA and RTA are assigned to the single projects in the PROJECTS module. In the MANAGEMENT module, all multi-project reports are clearly summarized with their respective lists, tables and charts.

Project *Dashboard* for the overview of all essential project parameters

Exports to Microsoft Office Word/ PowerPoint and PDF

KLUSA has a powerful and flexible template design functionality. The template design function allows users to define the content and layout of their reports. Both individual project and multi -project reports can be generated. The data used can be data from KLUSA project reports or current project data.
The templates generated with the design functionality can then be integrated into KLUSA as a separate menu item. Individual elements, such as logos, can be integrated into the templates.

An assistant leads through the template design. Project data and accountings can be selected, sorted and exported in form of lists and tables. Both individual reports and multi-project reports are possible. As a result, the KLUSA report can be de-signed to comply with the customer's CI rules. The user then can select the fitting template (e.g. a project status report) from a drop-down menu with other templates and download the corresponding project data in the customer's CI layout. The user selects a template and starts the report export. The data security is given, because KLUSA provides the report exports only with respective authorization.

Creating a report template for Microsoft Word and PowerPoint

Raw data exports to Microsoft Excel format

A Microsoft Excel butt on is available in many places throughout KLUSA. With the Excel exports raw data can be exported from KLUSA. This data ex-port can be used as a basis for further evaluations such as statistics, pivot charts or other subsequent reporting. The following exports are just some of the options available:

- Work breakdown structure with work packages and milestones with all relevant data (plan/actual dates, plan/actual eff orts, responsible, etc.)
- Cost exports with all cost data attributes (cost center, account group, account type, etc.), down to the individual cost detail record
- Resource planning
- Time accountings including plan eff ort/actual accounting comparisons on work package level

KLUSA web services

KLUSA web services are available for a data warehouse or any other in-house reporting system. All KLUSA data visible on the user interface is available via the documented web service.

KLUSA modules

KLUSA project management software is organized in modules that arrange the PM functions on a role-specific basis. The most important modules for reporting purposes are:

- Module PROJECTS: The single project management module for project managers.
- Module MANAGEMENT: Operational overviews and reports on project groups
- Module PORTFOLIO: Portfolio management planning, scenario analyses for project portfolio planning

KLUSA's project report

- Periodic generation in the PROJECTS module
- Archiving of most project data
- Description of the project for the management and team

- Automatic generation of a milestone trend analysis and cost trend analysis
- Representation in the PROJECTS and MANAGEMENT modules
- Creation of a project conclusion report

KLUSA supports the reporting periods weekly, bi-weekly, monthly, quarterly, and yearly) per project. The report comprises of the current project data as well as an individual description of the project status.

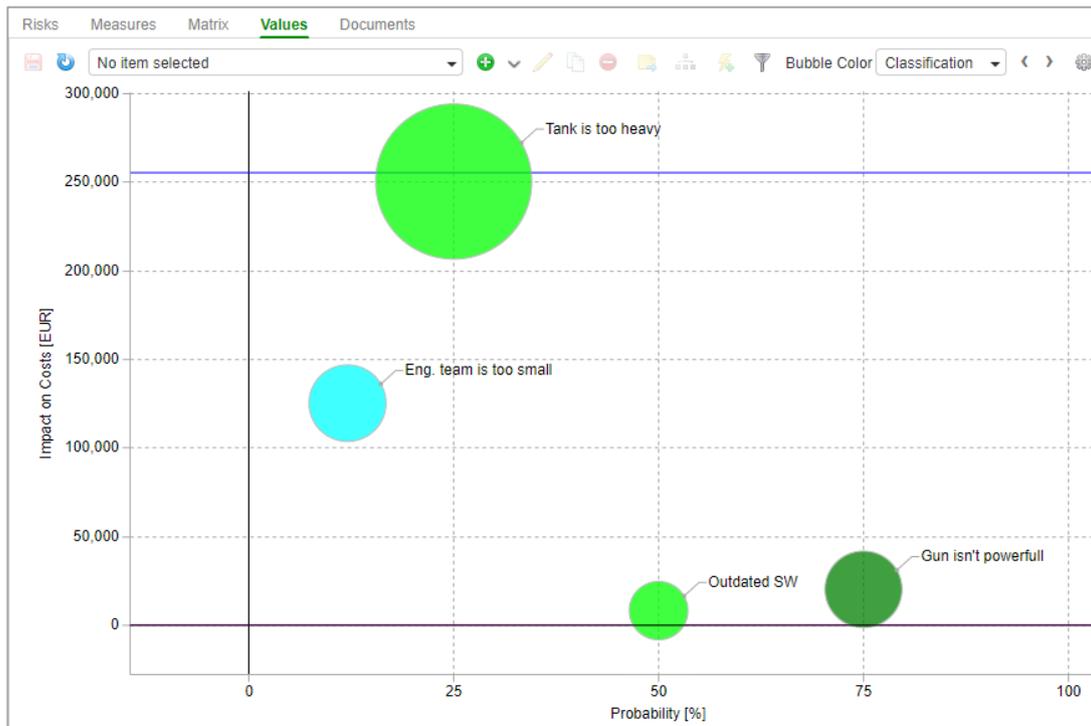| #	Work package/Account Group/Account Type/Cost Center/Cal...	Baseplan [EUR]	Approved [EUR]	Plan [EUR]	Actual [EUR]
1	◢ Total [EUR]	300,000.00	423,000.00	300,000.00	423,000.00
1.1	◢ [1] not assigned to WP	300,000.00	423,000.00	300,000.00	423,000.00
1.1.1	▷ Capital Costs	100,000.00	100,000.00	100,000.00	100,000.00
1.1.2	▷ CSC Personalkosten	0.00	100,000.00	0.00	100,000.00
1.1.3	▷ Personnel Costs	100,000.00	123,000.00	100,000.00	123,000.00
1.1.4	◢ Service Costs	100,000.00	100,000.00	100,000.00	100,000.00
1.1.4.1	◢ Consulting	100,000.00	100,000.00	100,000.00	100,000.00
1.1.4.1.1	◢ ASO-1000	100,000.00	100,000.00	100,000.00	100,000.00
1.1.4.1...	Jan FY2021	8,333.00	8,333.00	0.00	8,333.00
1.1.4.1...	Feb FY2021	8,333.00	8,333.00	0.00	8,333.00

Overview and chart of all costs

A snapshot of the project is stored when a report is created or updated. This snapshot contains the following project data:

- Work package data with plan and actual start and end dates, plan and actual eff ort, as well as the progress.
- Milestone data with plan and actual date
- Cost data (plan and actual costs of the project as well as the cost data from the last reference plan)
- Risks with category, risk value and status
- Quality milestones with category and status

The project manager adds an individual text report, separately for the management and project team, and set the project »traffic light«. The report data can be updated by the project manager, provided the respective period is open and no follow-on report has been created.

For every report, KLUSA creates a milestone trend analysis, cost trend analysis, and risk trend analysis.

Risk values chart

The largely automatic report generation process means that the eff ort required from project managers is kept to a minimum. The storage of key project data with each periodic report allows the project's progress to be retrospectively tracked.

Locking reports

Basically, creating a new report locks the previous report for changes. Optional, the reporting period can be locked manually or automatically by a specific month date. After setting the lock, the project managers cannot create or change reports for the elapsed time period.
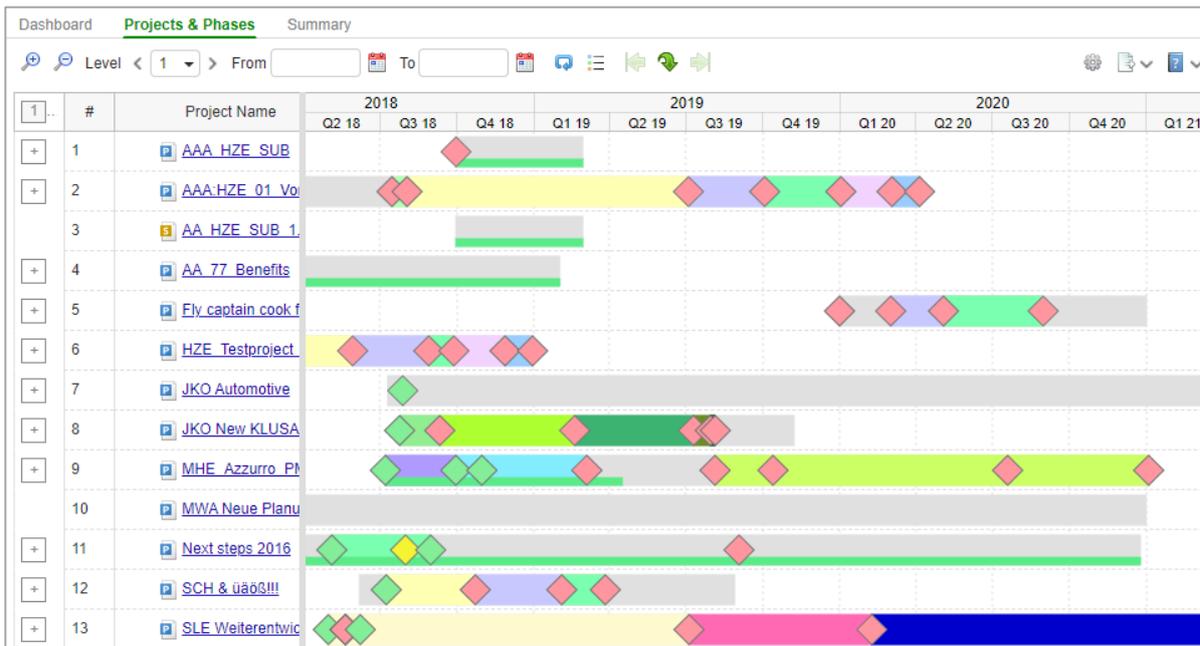
Final project report

The final report is part of a correct project closing and is used to provide a final analysis of the project's progress as well as documentation for handover to the customer (recipient, project client). The final report therefore also supports active knowledge management within the project organization and e.g., includes:

- Lessons learned (review, suggestions for improvements)
- List with handover points
- List with unresolved points citing the person(s) responsible and the target date for resolution.

Multi project reports in KLUSA

In the KLUSA MANAGEMENT module all reports of a selected time period are presented. Also, a list of missing reports can be displayed, here. Furthermore, KLUSA supports:

- Definition of the set of projects via a multi - stage filter (filter settings can be stored)
- Dashboard for identifying critical deviations
- Status overviews (progress, phases, missed due dates, risks, etc.)
- Financial overviews of costs and savings
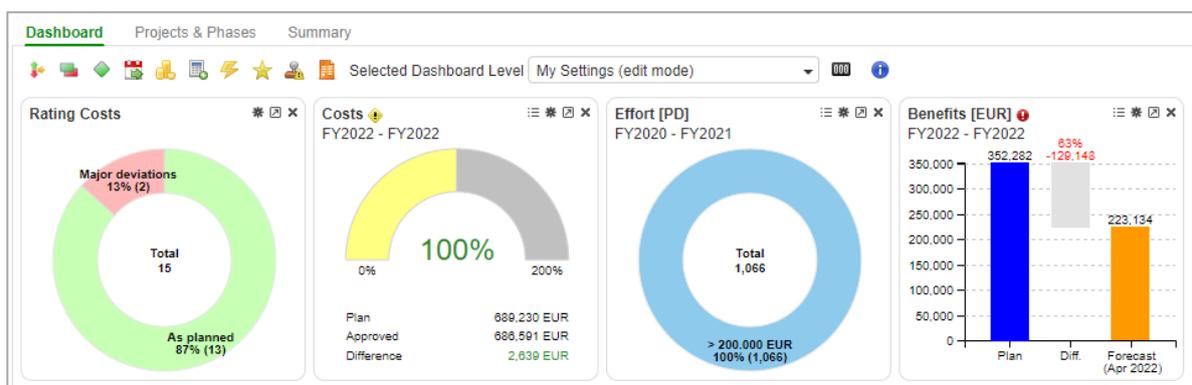- Performance indicators

Multi-project report *Projects & Phases* that displays plan and actual project dates

Users will find all multi-project reports in the MANAGEMENT module. All reports are generated instantly at the time of creation and therefore always represent current status of the project. Users of this module typically include project office managers, management, project managers, and program managers.

The MANAGEMENT module displays all textual reports of the single projects for a specific period. Also, a list of missing reports is displayed. In addition, there is the option to notify project managers of missing reports automatically by e-mail.

Each analysis or report must be based on a defined set of projects in order to be meaningful. For this purpose, the set of projects can be defined using filter and portal settings. All reports then are based to this set of projects. Depending on the content, reports are prepared as graphics, lists or charts, or a mix of these.

Management dashboard for the overview of all essential parameters

Data analysis

Most reports in the MANAGEMENT module are interactive. The drill-down function allows a further analysis of information down to the relevant element of a project. For example, the user can click into a segment of a pie chart. He then gets a list of all projects represented by this chart segment. A further click on the list brings the user to the detailed project element.

Compliance indicators for the with budget, time, scope and other objectives

Summary

Standardized KLUSA reporting reduces the effort required to generate and publish project reports. All the report data is stored as a complete project snapshot.

The KLUSA roles and rights concept ensures that all reports are provided only to their intended target group. The content, scope and presentation of the reports can be customized.

The analysis functions allow the easy and fast analysis of important information. This forms the basis for the ability to instigate countermeasures early in the event of critical deviations from the project schedule. Reporting functions for single project and multi-project make the tedious post-processing of data obsolete and thus save time that is then available for the actual project controlling including data interpretation.

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