



DATA SHEET

Project effort and time accounting

Project management, project effort and time accounting

The recording of time in projects (**project effort**) makes it possible to generate actual effort and thus allows a well-founded project controlling. Controlling at project, management or pool levels usually compares the plan effort with the recorded hours. Thus, experience values can contribute to the planning of new projects. In addition, time accounting values serve as the base for recording by cost centers for external or internal customers. For a better rating of the project progress, time accounting is used on work packages.

KLUSA also supports flexi-time models in pure working time accounting including overtime and missing hours and shows the workplace location.

Project effort and time accounting

- There are two possibilities of time accounting in KLUSA:
 - In **Project Effort** you can enter time for projects
 - In **Time Recording** you can enter pure working time (not project-related)
- Customer specific applicable functions for inability to work, holidays, flexi-time, requests, and approvals
- These and other functionalities can be used in the MYKLUSA module
- Display of plan and remaining effort for project team members
- Overview of the team members' time accountings for project managers
- Project summary and closed time accountings of pool members' for resource managers
- Automatic calculation of actual costs and effort from time accountings
- Due to the role and rights concept of KLUSA, only people have access to the time accounting data who have either been designated by the time accounting persons by themselves, e.g., as a substitute, or who need this data for hierarchical or for business management reasons (e.g., line managers or recording)
- Time accounting of the **Project Effort** is also possible in the KLUSA app

Time accounting of team members in MyKLUSA

- When recording the **Project Effort**, the time is recorded that was used to work on the work packages of the corresponding projects. Time accountings of the team members can be regulated in a way that recordings can only be entered on running projects where the members are involved. The amount of the recorded effort is independent of the team members' working time limits though. It is also possible to record project effort on behalf of a team member as substitute.

You can record project effort in three different modes: **daily**, **weekly**, or **monthly**. In the **weekly** and **monthly** mode, you can enter a total number of hours in the **Total** column that is automatically distributed then over the week or month accordingly. Closed project effort can no longer be changed and already calculated project effort is available as actual data.

When recording **Project Effort**, you can of course individually set the selection of the projects and work packages displayed.

Calendar Project Effort Summary Substitute Location							
Period << < 05/09/2022 > >> Level < 3 >							
#	Work package	Total	Mon 09.05	Tue 10.05	Wed 11.05	Thu 12.05	Fri 13.05
1	Difference	1:12	0:36	-1:00	0:24	0:48	0:24
2	Target	40:00	8:00	8:00	8:00	8:00	8:00
3	▲ Total	41:12	8:36	7:00	8:24	8:48	8:24
3.1	▲ Actual costs testing	15:24	3:24	2:24	3:12	3:12	3:12
3.1.1	[3] Initiation	8:24	2:00	1:00	1:48	1:48	1:48
3.1.2	[7] Development	7:00	1:24	1:24	1:24	1:24	1:24
3.2	▷ Große Freude II	0:00	0:00	0:00	0:00	0:00	0:00
3.3	▲ LVO_Test	10:00	2:00	2:00	2:00	2:00	2:00
3.3.1	[3] Initial	10:00	2:00	2:00	2:00	2:00	2:00
3.4	▲ Next steps 2023	15:48	3:12	2:36	3:12	3:36	3:12
3.4.1	[2] Analyse	7:48	1:36	1:00	1:36	2:00	1:36
3.4.2	[7] ITEW02 Konzept	8:00	1:36	1:36	1:36	1:36	1:36
3.4.3	[11] Produktiv	0:00	0:00	0:00	0:00	0:00	0:00

Recording of project effort

- The **Time Recording** offers the possibility of a pure recording of daily working time to retrace the working hours. It is possible to provide corporate calendars as well as working models for the various employees to limit the daily entered working hours. You can view the intended target for the respective period or its corresponding difference to the actual time records in respective columns. **Red** numbers indicate missing hours, **green** numbers indicate overtime.

Calendar Project Efforts Time Recording Summary Substitute Location Inability to work Leave Flexitime							
Period << < May 2022 > >> Flexitime (h): 1:04 Leave (d): 30,0							
Status	Date	Absence Reason	Difference [h]	Total [PD]	Total [h]	Target [h]	Time Recordings [h]
			-89:00	9,88	79:00	168:00	79:00
	Sun 01.05	Holiday	0:00	0,00	0:00	0:00	0:00
	Mon 02.05		1:00	1,13	9:00	8:00	9:00
	Tue 03.05		1:00	1,13	9:00	8:00	9:00
	Wed 04.05		0:30	1,06	8:30	8:00	8:30
	Thu 05.05		-1:00	0,88	7:00	8:00	7:00
	Fri 06.05		-1:30	0,81	6:30	8:00	6:30
	Sat 07.05	Non-Working Time	0:00	0,00	0:00	0:00	0:00
	Sun 08.05	Non-Working Time	0:00	0,00	0:00	0:00	0:00
	Mon 09.05		0:15	1,03	8:15	8:00	8:15
	Tue 10.05		-0:30	0,94	7:30	8:00	7:30
	Wed 11.05		0:15	1,03	8:15	8:00	8:15
	Thu 12.05		0:00	1,00	8:00	8:00	8:00
	Fri 13.05		-1:00	0,88	7:00	8:00	7:00

Recording of pure working time

- The **Calendar** gives a quick overview where members are at certain times.
- The **Summary** offers an overview on recordings in daily, weekly, or monthly granularity. You can see the target for the period and the respective difference for actual recordings. **Red** values mean missing hours, **green** values overtime.
- It is also possible to create **Substitutes** for users. Users listed here can record as substitute for the current user e.g., in case of illness or with open time accounting before monthly closing.
- All team members can also enter when they are not at the regular job location or have an absence. Single and serial elements can be created and deleted for half days and whole days. In addition, a reason for the absence can be selected and a comment deposited.
- In the index tab **Location**, you can see when an employee is not at his regular job location or has an absence. It is possible to create and delete single and serial elements for half days (A.M. / P.M.). Also, it is possible to select a reason for the absence and provide a respective comment.

Further functionalities

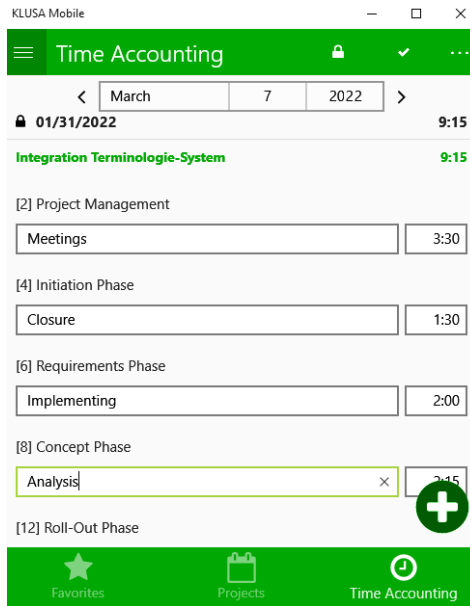
#	Type	Approved leave	Total	Special Accounting	Special Accounting Date
1	▲ Total days (2021)	2,00	2,00	0,00	
1.1	Carry over from 2020	9,00	9,00	0,00	
1.2	Entitlement 2021	30,00	39,00	0,00	
1.3	Jan	-2,00	37,00	0,00	
1.4	Feb	-5,00	32,00	0,00	
1.5	Mar	-2,00	30,00	0,00	
1.6	May	-1,00	29,00	0,00	
1.7	Jun	-11,00	18,00	0,00	
1.8	Sep	-10,00	8,00	0,00	
1.9	Oct	-1,00	7,00	0,00	
1.10	Dec	-5,00	2,00	0,00	

Management of leave (customer specific)

There are customer specific functionalities for

- the management of absences (caused by illness),
- the management of absences (because of leave),
- the management of requests for leave, flexi-time, and absence (subject to approval) as well as
- the approval of these requests.

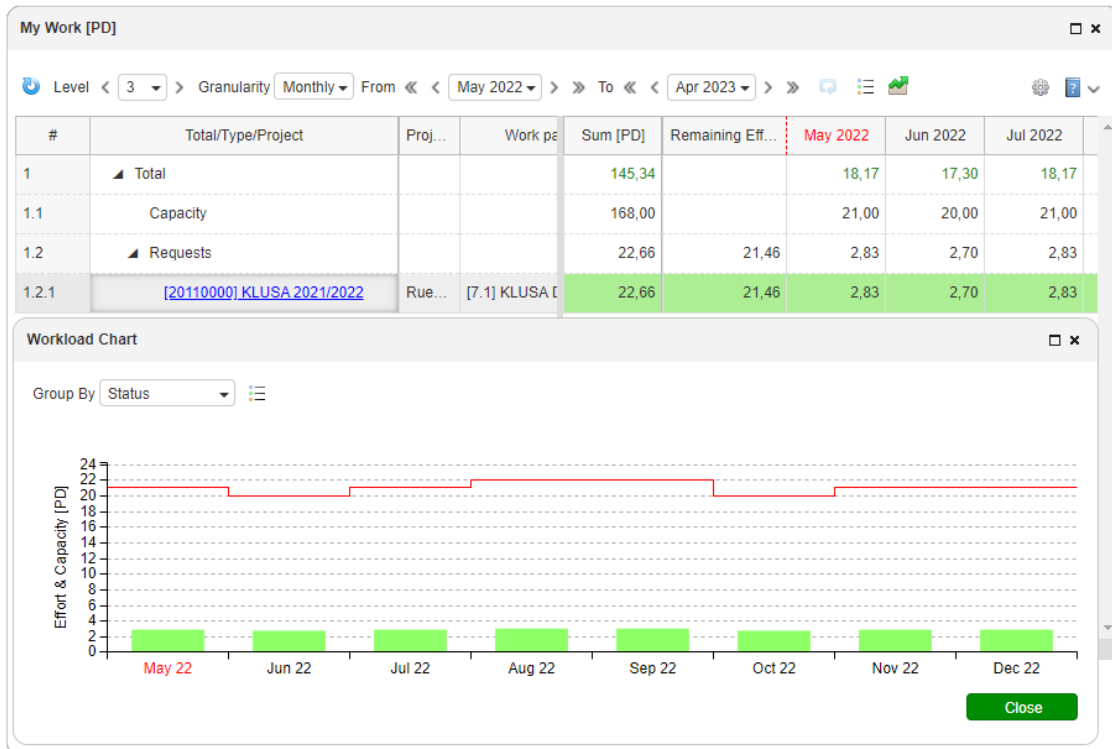
Mobile time accounting of team members using the KLUSA App



Mobile time accounting

Besides to recording the project effort, the KLUSA App also provides a mobile reading view of all projects where the user has privileges. For the project effort, you can set the projects to be recorded and the displayed period. A click on a work package opens a dialog to select or enter working time in hours or minutes. Additionally, a description of the activity can be entered. Using checkboxes, you can select or remove single work packages to record project effort.

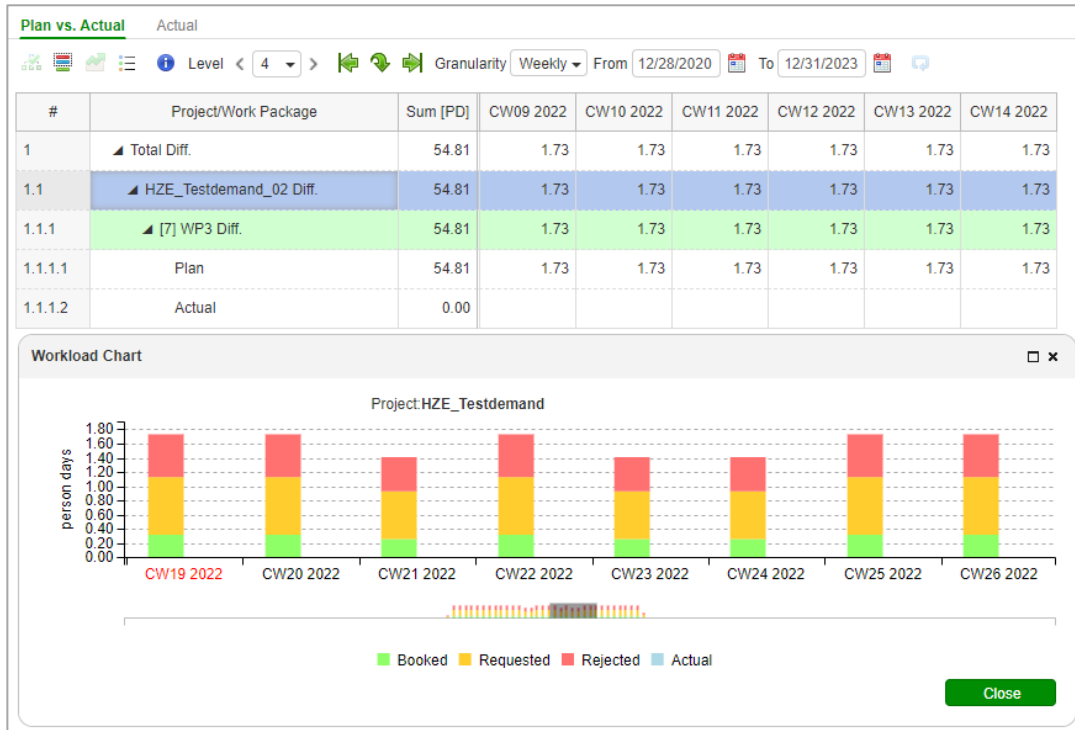
Display of plan and remaining effort in MyKLUSA



Individual workload chart of the project team member

In the personalized **My Work** view of the MYKLUSA module, the user finds data on period, booking status and effort for the projects where they are planned for. The start and end date of the displayed period can be set, a chart shows the capacity and utilization graphically.

Overview on the recorded working time of team members for project managers



Plan vs. actual comparison for project managers

In the **Time Accounting** tab of the PROJECTS module, it is possible to display recordings of the project's team members with either plan and / or actual values of the selected period in a tree view with a month table or as a corresponding bar chart. In *Plan vs. Actual*, you can find a comparison of planned resources in KLUSA with actual recorded project effort. *Actual*, shows all working times recorded by the single project members.

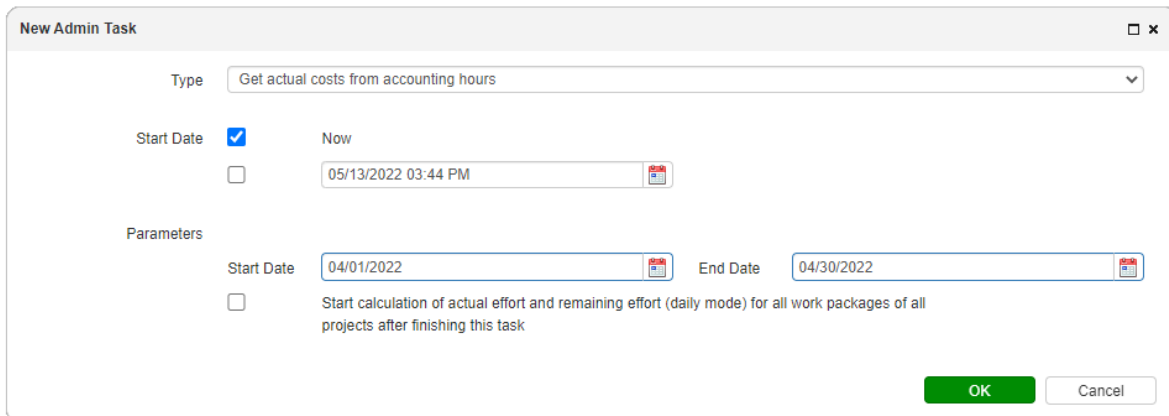
Project Summary and pool members' closed recordings for resource managers

#	User/Project/Work Package	Sum [PD]	May 22	Jun 22	Jul 22	Aug 22	Sep 22	Oct 22
1	▲ Total Diff.	980.35	110.00	110.00	105.00	114.99	110.00	105.00
1.1	▷ Ebner, Erich Diff.	61.90	6.95	6.95	6.63	7.26	6.95	6.63
1.2	▷ Lang, Matthias Diff.	46.86	5.26	5.26	5.02	5.50	5.26	5.02
1.3	▷ N.N. Diff.	749.71	84.11	84.11	80.29	87.93	84.11	80.29
1.4	▷ Winkel, Sepp Diff.	28.13	3.16	3.16	3.01	3.30	3.16	3.01
1.5	▷ Würfel, Henriette Diff.	93.75	10.52	10.52	10.05	11.00	10.52	10.05

Summary for resource managers

In the *Project Summary* of the **Time Accounting** of the RESOURCES module, you can see recordings of pool members in table. In *Plan vs. Actual*, a comparison of planned resources with actual recorded working time coming from the **Time accounting** of the MYKLUSA module is shown. In *Finished Project Efforts*, you can find all working times recorded by the pool's members for the selected period. **Yellow** bars show until which date members have closed their recordings though. **Green** bars tell that these recordings are already closed and calculated.

Background services to calculate recorded time



Calculation of actual costs and effort

KLUSA provides the following administrative tasks for the calculation of

- Actual costs coming from the recorded hours and
- Actual effort coming from the actual costs

These administrative tasks run in the background:

- Calculation of actual costs coming from recorded hours of **Time Accounting** in MYKLUSA; here cost will be calculated from the employees' recordings that also appears as green bars in the module RESOURCES **Overview Finished Time Records**.
- Calculation of actual effort coming from actual costs calculated by **Time Accounting**; here effort is calculated based on the progress data entered in the work packages.

After the calculation, this actual data is automatically available to the projects.

Summary

With KLUSA time accounting, you can easily maintain control over your project work time. Keep track of overtime and missing hours, manage easily leave days as well as flexi-time. Other office absences such as e.g., business travel, home office or sick days can also be recorded in KLUSA. So, your team always knows where you are and if you are available or not.



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