



KLUSA

Release Notes
KLUSA Version 23.1

KLUSA Version 23.1 – Release Notes

The functionality of KLUSA is continually evolving in new KLUSA versions. As part of the development, please consider the following additions, changes, and discontinuations.

Please note: This document is subject to change and thus only valid in the current version.

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Special formatting used in this document:

Add	Buttons (if not displayed as icon)
Enter	Keyboard or shortcut
PROJECTS	Menu level 1 (modules)
General	Menu level 2 (tabs)
Diagram	Menu level 3 (index tabs)
Code	Labeling of fields or headings in window
Work in progress	Info not finally available or not yet implemented
Customizing	Customer specific functionality

1. Announcements

1.1. Dashboards

We removed all **tile** buttons from the toolbar of the KLUSA dashboards (except of the **Info** button). Instead of this, KLUSA now displays an **Add** button to open a dialog to select a tile. When you select and click a tile that has a special settings, a window with these settings is opened before the tile is displayed. Tiles without settings are displayed immediately after selection. You can display a tile with settings several times in the **Dashboard**. This is true for MyKLUSA, PROJECTS, and MANAGEMENT module.

This way, configuring an individual dashboard with special parameters becomes easier in KLUSA.


1.2. Elements are shown in portal color

Now, portals can be marked with a specific color that is shown in every tree view for the respective elements like demands, projects, pools, and companies. This way, it is easier to see at once to which portal an element belongs to. The colors are defined in the ADMINISTRATION module

1.3. Renaming of Resource Analysis

We renamed the **Resource Analysis** tab to **Resource Cockpit**. This concerns the PROJECTS as well as the RESOURCES module.

1.4. Tooltip for grouping

The  button in the element tree now shows the current **Group by** as a tooltip.

1.5. Missing reports

Projects that meet a certain project status like e.g. **on hold** are not displayed in the following views and exports:

- MyKLUSA/My Overview Dashboard My Missing Reports
- MANAGEMENT Project Reports Missing Reports
- MANAGEMENT / PROJECTS Excel Export (all projects) Missing Reports

The respective project status that decides about this condition is determined with the flag **Consider for missing reports** in the portal catalog **Project Status** in ADMINISTRATION **Catalogs Catalogs (Portal)**.

1.6. Improvement of the user search dialog

We marked several sensitive data like AD account or employee number as **customizing** and added the column email. The email address could be an interesting information and serve for collaboration.

Additionally, we have implemented the integrated search in the first table row for many tables and dialog windows.

1.7. Opt-out of confirmation messages

We implemented a checkbox to opt-out the further displays of the confirmation messages for multiple time actions. Instead, the user activates the checkbox: **Don't show this message again in the current session**. KLUSA then assumes automatic confirmation. This is stored in the user session and reset each session. This is currently true for the **Team** tab.

1.8. Optimization of setting dialogs

For better readability and thus usability, we increased the line height (thin double line) and white space of the lists within the **Settings** dialogs. Also, the font size was increased a bit.

1.9. New filter stakeholder

We introduced the new filter **Contains Stakeholder** to better find projects with stakeholders.

1.10. New filter Leading Portal

We introduced the new filter **Leading Portal** to better find projects assigned to a specific leading portal. Also, the information on leading portal is now available in projects' exports.


1.11. New icons for time settings

We modernized the icons to **Set Start**, **Set End** and **Set complete time frame**.

1.12. Better readability in Setting dialogs

We increased line height, white space and font size in **Setting** dialogs to make the lists easier to read.

1.13. Toggling password visibility

It is now possible to check your password in the login dialog using the  eye icon to toggle the visibility of your password. This helps avoiding invalid logins due to typos.

1.14. Better inter-activity in e-mail notifications

For better inter-activity in sent-out e-mail notifications, we implemented deep links for milestones and work packages as well as ics-files with the calendar information for all useful emails. Thus, faster access to important KLUSA elements is possible and taking over calendar information supports collaboration with other tools like e.g. Microsoft® Outlook.


2. MyKLUSA

2.1. My Overview

2.1.1. Number of critical elements of the Dashboard

We made the number of critical elements more transparent by adding a tooltip over the **My Overview** tab; this new tooltip shows the single as well as the overall number of critical elements independent of the **Dashboard**'s activated widgets.

2.1.2. Edit work package from Dashboard

In the **My Work Packages** widget of the Dashboard, it is now possible to edit work packages directly. With a click on the  button of a work package, you can now **Edit** a work package in the respective modal window of the **PROJECTS Schedule GANTT Chart** index tab.

2.2. Time Accounting

2.2.1. New export Inability to work

We implemented the **customer specific** Excel export **Inability to work** with time data per user in days per period of the corresponding index tab.

3. Projects

3.1. New Portfolio functionality

Customer specifically this functionality could be disabled.

With the new **Portfolio** functionality, the portfolio manager can decide about the projects to be included in a portfolio. Also, they can change the start date of project in a scenario of their portfolio while considering resource capacity, time, and costs. Thereby, they can only change the start of a project not the detailed planning of the project manager.

Project managers will be informed via e-mail that they should change the start date of their project. KLUSA will also display that information on the GUI. They change the planned start date, and thereby inform the portfolio management that the project has been re-planned.

On the GUI, there is the new menu item **Portfolio** including the index tabs **Overview** and **Roadmap**. In the **Overview** index tab, it is possible to add, edit, delete, approve, and revoke an approval of scenarios. For the scenarios, it is possible to determine the scenario resource capacity. Also, a scenario code is generated automatically. In the **Roadmap** index tab, there is GANTT Chart like view including a table and a timeline. The table shows the most important project data like dates, costs, effort, priority and the like, whereas the timeline shows the runtimes of the (subordinated) projects included in the selected scenario. Above it is possible to select a scenario, to select the required timeframe, to hide excluded projects and to show the data in different charts; also, navigation elements comfort usability.

3.2. Dashboard

3.2.1. New widgets

We implemented the charts for **Project**, **Milestones**, **Work Packages** and the new chart **Work Breakdown Structure** as new widgets. See Project Attributes charts.

3.3. General

3.3.1. Project Attributes charts

We have modernized and unified the charts for **Project**, **Milestones**, **Work Packages** and the new chart **Work Breakdown Structure**, including their respective legends. Also, we have moved them from the drop-down menu of the **General Project Attributes** index tab as new widgets to the **Dashboard** where you can now select and open them full-size. Alongside, the picture **GANTT Chart** for ASPOSE™ reports was updated accordingly.

3.3.2. New index tab External Cost Rates

Customer specifically this functionality could be disabled.

In this new index tab, it is possible to maintain cost rates for skills per projects, and thus provide prerequisites to extend the accounting of external cost rates by skill. Thus, we meet the request to define external cost rates for the further charging per project and skill.

3.4. Team

3.4.1. New style for the style for the Organization Chart

We have modernized the style for the **Organization Chart**. The cards representing the roles are now with rounded edges and in customizing colors. Also, tooltips on team members of the Roles show the most important information and a click opens a **Person Details** window including clickable e-mail address, like in the **Team** index tab.

3.5. Schedule

3.5.1. Milestones and work packages clickable in GANTT Chart

You can now open the dialog to edit a milestone or a work package by simply clicking the respective icon in the **GANTT Chart**. Also, we now prevent useless transformations from milestones to work packages – and vice versa. In between transforming of different milestones and work package types like e.g. standard milestone to milestone is still supported, of course.

3.5.2. Enhanced email notification for linked and reporting milestones

In addition to the existing options for email notifications for linked milestones and reporting milestones, it is now possible to notify about **setting/changing the actual date** of these milestones. Here, the person responsible for **linked/reporting milestones** decides on the group of people to be informed. The email notification itself contains a deep link to the respective milestone. Also, users are now warned about the disabled notifications when setting up e-mail reminders for milestones and work packages.

3.5.3. Search functionality for skills

For better resource assignment, we introduced a new search field for the drop-down menu **Skills** in the table of the **Resource Requests** index tab.

3.5.4. New display of activities as Kanban board

Customer specifically this functionality could be disabled.

In the **Schedule Activities** index tab, it is now possible switching between activities grid and an agile **Kanban board** view.

- The tiles of the **Kanban board** view are movable;
- Dragging the tiles into a column, the status of the activity automatically changes to the status displayed in the header;
- Tiles' additional information is displayed in "read only" format
- Editing furthermore takes place in the activities grid view
- An interface to Jira is foreseen for this functionality

Type changes in activities grid are synchronized to the **Kanban board** and vice view versa. Also, a direct link to the **Kanban board** is possible, e.g. by e-mail or chat program.

3.6. Scoring

3.6.1. New design for Scoring attributes

We have newly structured and modernized the display of the **Scoring Attributes** index tab in order to better enter and analyze attributes - including **customer-specific** ones.

3.7. Reporting

3.7.1. Copy text from grids

When creating an external management report, it is now possible to easily copy text from the grids of all **Reporting** index tabs using **copy&paste**. To

- copy a selected row of table, just press **Ctrl+C** and to
- copy a selected cell content of table, press **Ctrl+Alt+C**.

3.8. Time Accounting

For better performance, we now show a shorter timeframe default offset in the **Actual** index tab.

3.9. Variants

We improved the appearance of variants by optimizing both color frame of the workspace and vertical display of variants name and code.

4. Resources

4.1. Members

4.1.1. Bulk member move

It is possible to not only move single but also multiple pool members in the **Memberships** index tab. KLUSA handles the requests according to the selected move option and now pays respect to business rules like e.g. existing accountings. Cancelling the move of pool multiple members has to be done on a singular level.

4.2. Time Accounting

4.2.1. Changed timeframe

In the **Plan vs. Actual** index tab, the timeframe now starts by default eleven months before the current month and ends in the current month. Of course, this can further on be changed at will.

5. Administration

5.1. Users & Groups

5.1.1. Inline search for the list of users

We implemented an inline search in the table of the **List of Users & Groups**, additionally to the already existing **Quick Filter**. Thus, a search for more user attributes is possible.

5.2. Portals

It is now possible to activate the new switch **Resources isolated** for a portal in the section **Global / Portal** of a portal's **Settings**. This way, resources and resource pools can be limited to a single portal, while other portals of the instance jointly manage resources and pools. Here, it is also possible to activate **customer specific** switch **Transfer to SAP**.

Additionally, in the **Projects / Portfolio** section, you can now decide whether mandatory projects of a leading portal may be postponed in a scenario or not. Note that this is the plan start date of a project.

Also, we implemented the **Reset all sections to the default settings** and **Open/Close all sections** functionalities in the **Scorecard Settings** index tab of the modal window to edit a portal.

5.3. System Support

5.3.1. Enhanced notification for UserSync (Basic)

We enhanced the notification (by e-mail) for **UserSync (Basic)** in the **System Settings** index tab. It is now possible to set the notification to

- Off
- On, send always
- On, send only in case of error

Thus, you can enable the send out of a notification only in case of an error.

6. Appendix

6.1. New rights

(Light grey = changed right; Green = customizing right; red = obsolete right)

Right	Scope	read	create	write	delete	Right Description
MyKLUSA Time Accounting User Sickness for Others Export to Excel	System			x		Gives the right to export "Inability to Work" data to Microsoft® Excel
Project General External Cost Rates	Element	x		x		Gives the right to manage external cost rates
Project Portfolio	Element	x	x	x	x	Gives the right to manage the portfolio scenarios and roadmaps
Project Portfolio Approval	Element			x	x	Gives the right to approve a scenario or to revoke the portfolio scenario approval

Contact:

OPUS Business Solutions GmbH
 Elsenheimerstraße 41
 80687 Munich
 Phone: +49 89 45229 100
info@klusa.com
www.klusa.com