



KLUSA

Release Notes
KLUSA Version 24.1

KLUSA Version 24.1 – 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. Two-factor authentication

We now offer two-factor authentication to all **customer instances** that are not on-premise nor use Azure/Entra. For reasons of security, all customers now have the possibility to use the internal two-factor authentication. Exceptions are possible of course if customers have their own internal security mechanism.

1.2. Changes in Change Requests Overview

We improved the user experience for the PROJECTS **Change Requests Overview** resp. MANAGEMENT **Approval Management Baseplans/Change Requests** index tab by renaming the headers of **Scope**, **Time** and **Costs** columns to full words and introducing **↑** red arrows up for increased values and **↓** green arrows down for reduced values for **Time** and **Costs**.

1.3. Adding text information to loading spinners

We now display a message in a text box below the spinner about what currently is happening in KLUSA.

1.4. Shortcuts list implemented

In the user menu, we implemented a link to the list of shortcuts. The link is located between the **Help** and the **Support** menu items and leads to the **Shortcuts list** that is part of the suffix in the **General** manual. Shortcuts can help using KLUSA faster.

1.5. Integration of display name

For advanced search, we integrated the **Display Name** and **E-Mail** from Active Directory resources to all user search dialogs.

1.6. Exceptions

We extended the **red exception line** with exception number and time stamp.

1.7. Tooltip for leading portal

We implemented a tooltip for the leading portal of respective elements in the **Overview** and element trees of the **DEMANDS**, **PROJECTS**, **RESOURCES** and **COMPANIES** modules.

1.8. Multi-sorting on columns

We introduced a multi-sorting on columns for lots of pages over all modules. Thus, you can sort (even multiple) columns using the blue **↑↓** arrows of the column header. Also, we started to implement the filtering of each column of these pages.

1.9. E-Mail Reminders

For better transparency, we implemented the sender e-mail address as clickable link (<mailto:>) in all notifications and reminders.


2. MyKLUSA

2.1. Time Accounting

2.1.1. Possibility to account actual effort

It is now possible to account actual effort using an **Activity Code**. Also, the effort can be distributed over several **Activity Codes**. However, accounting is only possible within the current plan.

2.1.2. Deep link to work packages

To simplify and share effort recording on work packages, we introduced a  deep link to the **Time Accounting Project Effort** index tab.

3. Projects

3.1. Filters

3.1.1. New filter Contains Actual Milestone Dates from Windchill

Customer specific filter.


For testing purposes, we implemented the new filter type: **Contains Actual Milestone Dates from Windchill**. Here, the following criterion is true: The project contains at least one lock type **Actual date transmitted from external system** - at IFX this is called Actual date transmitted from Windchill.

3.2. Overview

3.2.1. Quick filters for many attributes


We implemented quick filters for lots of attributes on the table of the **Projects** index tab. The filters are connected with **AND** and thus make smaller results with every new filter set. Also, a project filter is created with these quick filter criteria.

3.2.2. New legend

The new  **Legend** button opens a modal window on all index tabs explaining the symbols and colors used for the project approval status (**BP/CR**) and the project's **Rating**.

3.3. General

3.3.1. Project Attributes

We renamed the **Folder Project** field to **Parent Project**. Additionally, it is now possible to  **Assign subordinate projects** as multiple projects with this new functionality. This provides more comfort, especially for projects of the **Portfolio** type.

3.4. Collaboration tab for project type Portfolio

We implemented the **Collaboration** tab including the **Challenge Board** for projects of the **Portfolio** type.

3.5. Risks

3.5.1. Switch horizontal/vertical axis of the Matrix

It is now possible to have another display of the ventures' **Matrix** by a switch of the horizontal / vertical axis, so Probability and Impact could be regarded differently. The default stays: **Horizontal: Probability** and **Vertical: Impact**. This is steered in the KLUSA ADMINISTRATION. See also **Venture Class Matrix**.

3.5.2. Risk reponse strategy

We introduced the new **customer specific** attribute **Risk reponse strategy** in case that all measures of a risk have the same response strategy. This read-only field can be shown in the table of risks as well as in the edit dialog of a risk. For the new attribute, the following rules are true:

- No measures: field is empty
- All measures have the same response strategy: field shows the response strategy
- Measures have different response strategy: field remains empty


Additionally, the **Risk reponse strategy** is shown in the index tabs **Change Requests Risks** and **Reporting Risks**, and risk-related MS Excel exports. The content of the field is defined in ADMINISTRATION **Catalogs Catalogs (Portal) Response Strategy**.

3.6. Schedule

For a better overview, we have further structured the **Milestones**, **Work Packages** and **Activities** modal editing windows and, in some cases, the subordinate sections by using index tabs, thus enabling faster work.

3.6.1. GANTT Chart

When editing multiple nodes (work packages, milestones) and using the **Previous** / **Next** buttons to navigate between nodes in the modal window, the last used index tab remains instead of switching to first (default) index tab. This makes it easier to edit identical attributes across multiple nodes. Additionally, it is no more possible to change the category of a node; i.e. work package to milestone and vice versa.

For a better user experience, we changed the window to **Insert Schedule**  including a filter section in the left pane.


For workpackages, we implemented the new field **Work Performed** in the **Effort & Progress** and **Costs** index tabs of the modal detail window **Edit Work package**. In doing so, **Work Performed** is taken over from values of the PROJECTS **Time Accounting Actual** index tab of the respective work package. In the **Effort & Progress** index tab values are displayed in man-days, in the **Costs** index tab values are displayed in currency - **Local** and **Aggregated**.

Customer specifically, we implemented a plausibility check reason for work packages that tells "**The project cannot be saved. Please set the Free for Time Accounting Flag for at least one work package.**" This way, it is always possible to account at least on one work package of a project.

Also **customer specifically**, the **Windchill Connector** of KLUSA sets the same actual start date for the B-milestone as for the main milestone as long as the B-milestone has exactly the same milestone name as the original milestone. If the Windchill connector has transmitted a milestone actual date to KLUSA, the user will not be able to edit that date anymore (**Exception**: specific right; see **New rights**). KLUSA logs a transferred actual milestone date from the **Windchill Connector** in the **Locking** section of the **General Extras** index tab.

3.6.2. Resource Requests

Project managers are now notified by e-mail if requested resources are **rejected**.


When you  Add a new resource request, the new row containing the resource request is now displayed on the top of the table. This enables a quicker editing– even when grouping is active. The status in the **Select Pool Member** and **Select Resources** dialogs in the table of **Resource Requests** now only considers the time period starting with the first month where there is requested plan (>0), and ending with the last month where there is requested plan effort (>0); a respective tooltip is provided for the **Fit** column. Additionally, the **Indicator** column of the table of **Resource Requests** was adapted accordingly.

3.7. Costs

3.7.1. New index tab Chart

We introduced the new index tab **Chart**. This provides an immediate fullsize graphical overview of cost data (first index tab). Possible displays include the **Cost Sum Chart** and **Cost Bar Chart** already known from the **Overview** index tab.

3.7.2. Plan / Forecast

KLUSA now directly opens the  Edit window of a newly added material after the user has selected a material in the **Material List** on the **Plan** or **Forecast** index tabs.

3.8. Benefits

3.8.1. New index tab Chart

We introduced the new index tab **Chart**. This provides an immediate fullsize graphical overview of benefit data (first index tab). Possible displays include the **Benefit Sum Chart** and **Benefit Bar Chart** already known from the **Overview** index tab.

3.9. Change Requests

Customer specific changes.

It is now possible:

- to select the milestones where a new last approved date should be requested,
- to select the risks again after a classification change of the CR,
- to see the last KPI date and the requested KPI date, and
- to receive an email, when the CR approvals are all done.

Also, change requests are now only possible for all part milestones of a single part.

3.10. Reporting

3.10.1. Reason for delay

We changed the rule for locked reports, so only reasons for delay larger than 0% are displayed in this **customer specific** index tab.

3.11. Challenge Board in Final Report

We added the index tab **Challenge Board** to the **Final Report** tab. This challenge board has the same functionality as the one in the current plan. Also, it is possible taking over either the current challenge board of the project (**Collaboration** tab) or as of the last report.

4. Management

4.1. Overview

4.1.1. New index tab Challenge Board

We added the new index tab **Challenge Board** to the **MANAGEMENT Overview** to inform the management about issues of all projects as a kind of "lessons learned". KLUSA only shows items that are tagged as **Show in Management** in both challenge boards of the **Collaboration** and **Final Report** tabs of the **PROJECTS** module. The cards are read-only and could be filtered to either **Show All**, **Open** or **Closed Topics** and **Classification** as well as **Show Solutions**. Additionally, it is possible to filter by the classification of the activities from a drop-down menu in the tool bar.

4.2. Finance Management

4.2.1. New index tab Chart

We introduced the new index tab **Chart**. This provides an immediate fullsize graphical overview of cost / benefit data (first index tab). Possible displays include the **Cost Sum Chart** and **Cost Bar Chart** as well as the **Benefit Sum Chart** and **Benefit Bar Chart** already known from the **Costs** and **Benefits** index tabs.


4.3. Resource Management

4.3.1. New index tab Chart

We introduced the new index tab **Chart**. This provides an immediate fullsize graphical overview of resource data (first index tab). Possible displays include the **Effort Sum Chart** and **Effort Bar Chart** as well as the **Workload Chart** already known from the **Resource Analysis** and **Resource Availability** index tabs.

5. Resources

5.1. Resource Requests

In the **Resource Requests** index tab, KLUSA now shows the complete period of a request depending on the first month of the resource request that has an effort (>0), and the last month of the resource request that has an effort (>0), when the user click the button  **Set complete period of the selected resource request(s)**.

5.2. Members

Customer specifically, it is now possible that the resource manager gets a warning about pool members with no special worktime model when adding a pool member in the **Members Memberships** index tab that reads: "The pool member has currently no worktime model (WTM) assigned. The WTM will be assigned automatically via nightly synchronization with SAP HR.". See also **ADMINISTRATION Work Schedules**.

6. Administration

6.1. General

6.1.1. Integration of PIWIK web statistics monitoring

Customer specifically, we implemented the **PIWIK** web statistics monitoring. **PIWIK** uses a tracking code (a JavaScript code) to collect data about people who visit KLUSA. The tracking code is embedded on KLUSA pages. Every time a visitor comes to a page, the tracking code grabs information about that visitor and sends it to **PIWIK**. Then **PIWIK** organizes this data into reports.

6.2. Users & user groups

6.2.1. Work Schedules

Customer specifically, it is now possible to set a flag to exclude a user from the automatic update of the **Worktime Model**, because the user gets a special worktime model that deviates from the HR data. In the **Work Schedules** index tab of the modal window to edit a user, there is new column **Auto Update** with a checkbox for such cases. See also **RESOURCES Members**.

6.2.2. Licence overview

New message regarding the limitation of users above the license threshold:

“The KLUSA licenses do not cover all active users (write: <number>, read: < number >). An additional goodwill (write: < number >, read: < number >) has been set up for your instance. If the number of active users also exceeds these goodwill values, the login is restricted. Please reduce the number of active users or get additional licenses from the vendor.”

6.2.3. Link AD security groups to User Groups for nightly sync

Customer specifically, it is now possible that the administrator enters the **AD Security Group** at the user group in KLUSA; the user group members are then automatically synced from the members of the **AD Security Group**.

6.3. Catalogs

6.3.1. Venture Class Matrix

It is now possible to switch the horizontal/vertical axis for the matrix using the drop-down menu **Axes Alignment**. The drop-down menu consists of the two menu items **Horizontal: Probability / Vertical: Impact** and **Horizontal: Impact / Vertical: Probability**. Changes here need to be saved and are valid for all venture types and all portals. See also Switch horizontal/vertical axis of the Matrix.

6.3.2. Materials

The portal columns in the **Settings** dialog are now removable; i.e., you can gain a better overview only using the portal columns that you really interested in resp. need.

6.4. System Support

6.4.1. Entra ID-Connector

We optimized the synchronization of **deactivated** (and thus inactive) users by enabling seamless creation of **active** users in KLUSA and introducing a switch for the effortless handling of **deactivated** users. This job is located in the **System Support Admin Tasks**, called **Start User Synchronization with Entra ID** and can be run as defined (default: daily). Please note that the sections **UserSync**

(Basic/Advanced) in **System Support System Settings** are disabled with this job. Instead of the **customer specific** section **UserSync (Entra)** is enabled where you can filter by different attributes.

Also, the **Entra Display Name** is transferred to the KLUSA DB-field "use_display_name"; thus, it is possible to see this data in KLUSA.

6.4.2. New index tab Fiscal Years

We introduced the new **customer specific** index tab **Fiscal Years**. Here, you can easily maintain fiscal year calendars in a table by entering future period end dates and SAP period end dates.

6.4.3. New index tab Logins

To further ensure the security of the application, we have implemented a login protocol in KLUSA. Here the IP address, the used login name, the date and time of login as well as information about whether the login was successful, are displayed in a table. KLUSA also sends an email to the KLUSA Support, if more than 50 failed logins occur in a specified time period.

7. Appendix

7.1. New rights

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

Right	Scope	read	create	write	delete	Right Description
Admin System Support Logins	System	x				Gives the right to access the page Admin/System Support/Logins
Project Milestone Windchill Actual Date Override	Element			x		Gives the right to override the actual date of a Windchill Project Milestone

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