



# Blue Ant Range of functions 26.0

# Contents

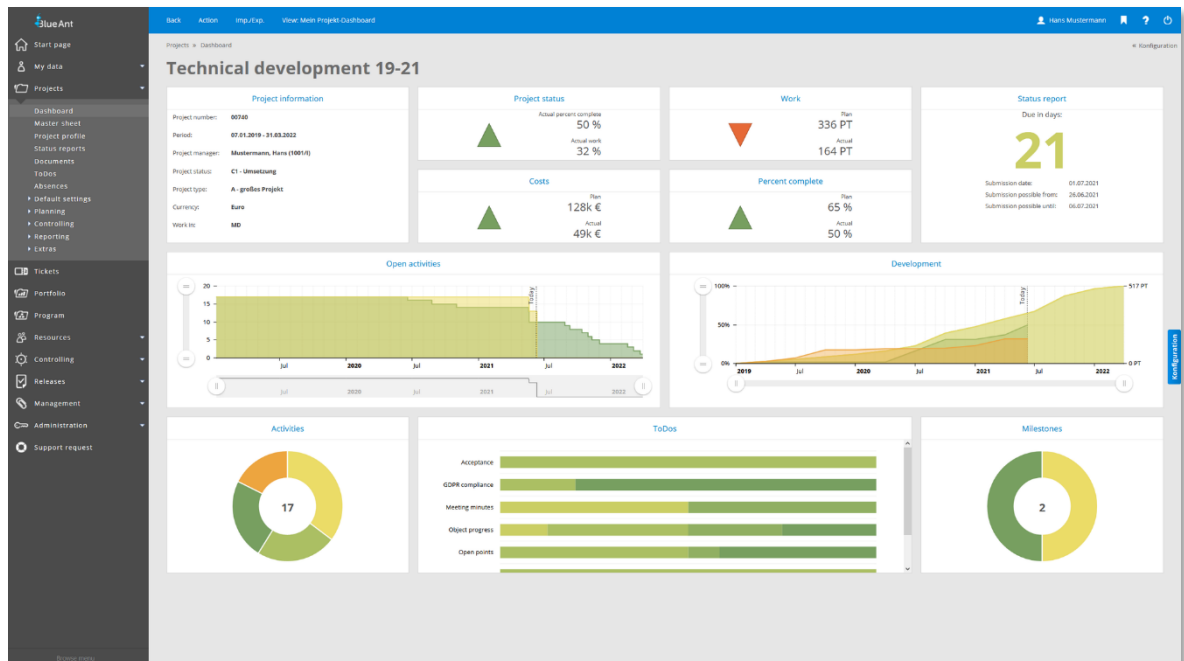
.....	1
<b>Contents .....</b>	<b>2</b>
<b>1. Project planning and controlling .....</b>	<b>5</b>
Classic project planning .....	5
Agile project planning .....	6
Flexible budget and quote management .....	6
Project controlling .....	7
Risk and stakeholder management .....	7
<b>2. Resource management .....</b>	<b>8</b>
Project resource costs .....	8
Knowledge management .....	8
Reservation of project resources .....	9
Management of project participants .....	9
<b>3. Kanban boards and ToDo lists .....</b>	<b>10</b>
Kanban boards in projects .....	10
Kanban board on the start page .....	10
Kanban board for portfolio and program .....	11
Kanban board in Controlling .....	11
ToDo lists .....	11
Administrative tools .....	11
<b>4. Knowledge management .....</b>	<b>12</b>
Manage knowledge .....	12
Use knowledge .....	12
<b>5. Project documentation .....</b>	<b>13</b>
Store project documents .....	13
Find project documents .....	13
<b>6. Time recording .....</b>	<b>14</b>
Quick recording .....	14
Comprehensive recording .....	14
Administrative tools .....	15
<b>7. Ticket system/Task management .....</b>	<b>16</b>
Ticket subjects and workflows .....	16
Service level agreements .....	16
Administrative tools .....	16
<b>8. Travel costs in the project .....</b>	<b>18</b>
Receipt request and recording for everyone .....	18
Administrative tools .....	18



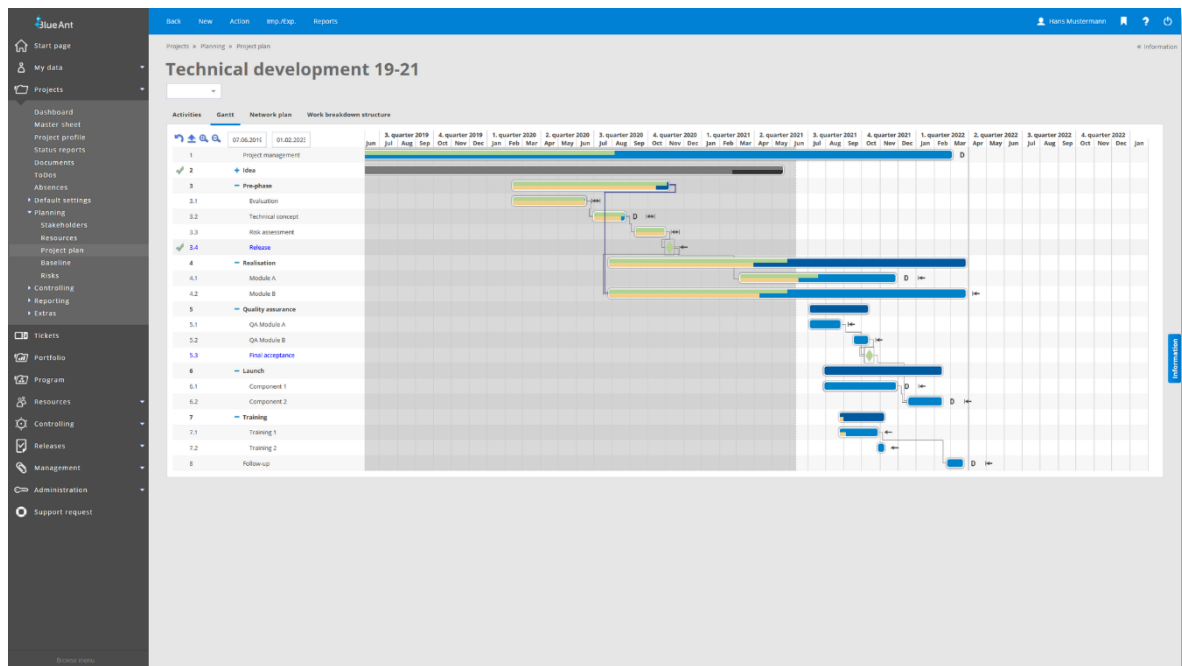
<b>9. Project billing</b> .....	<b>20</b>
Fast selection of work performed .....	20
Easy preparation of activity confirmations and invoices .....	20
<b>10. Project portfolio</b> .....	<b>22</b>
Management of project portfolios .....	22
Simulation of project portfolios .....	23
Rights for portfolio managers .....	23
Visualisation of project portfolios .....	23
Display in project portfolio dashboards .....	23
<b>11. Project programs</b> .....	<b>24</b>
Management of project programs .....	24
Simulation of programs.....	24
Rights for program managers .....	25
Visualisation of project programs.....	25
Display in project program dashboards .....	25
<b>12. Controlling</b> .....	<b>26</b>
Portfolio simulation .....	26
Project reports and project evaluation at the touch of a button .....	27
Forecasts and analysis ad hoc .....	27
Project resource utilization .....	27
Administrative tools .....	27
<b>13. Administration</b> .....	<b>28</b>
Flexible user interface.....	28
Extended customizing.....	28
Easy rights management .....	29
<b>14. Add-ons</b> .....	<b>30</b>
For mobile devices.....	30
For JIRA.....	30
For Azure .....	30
For AI agents .....	30
For MS Project .....	30
Supported process models and standards .....	30
<b>15. Interfaces</b> .....	<b>31</b>
<b>16. Blue Ant Module/Functions</b> .....	<b>32</b>



All of the following functions are available in the Standard, Enterprise and Cloud editions. For availability, please refer to the module and interface overview at the end of this document.



# 1. Project planning and controlling



**Blue Ant project management software provides project managers with a single platform for project planning and controlling.** Seamless integration into multi-project management additionally supports planners in resource management, time management and the coordination of absences. Blue Ant gives you all key project figures at a glance; in real time and without manual data preparation. You can also create individual reports for the project evaluation and issue them as PDF documents. Because project planning and project control are closely connected, Blue Ant makes control-relevant data available within the project plan, supporting project reporting, budgeting and risk management simultaneously. Current key figures are prepared in Blue Ant for the client, controlling and management using clear reports. This considerably reduces administrative effort.

## Classic project planning

- Quick creation of a project using template management
- Support of classic, agile and hybrid planning methods
- Simple creation and modification of project plans
- Import of all project data from templates, projects and MS Excel
- Definition of resource, project or individual cost-rates down to activity level
- Definition of billing status for each activity and planned costs
- Planning interface to MS Project
- Project creation from quote items
- Calculation methods ('forwards'/'backwards'), including critical path and configurable conflict reports
- Project plan calculation with consideration of approved and/or planned absences
- Resource planning without reservations
- Option to create any number of baselines using current planning and/or other baselines



- Option to create any number of links between activities throughout the multi-project structure
- Displays showing main and sub-project structures, including all activities, as WBS or Project schedule (GANTT chart and network plan)
- Interactive GANTT view (drag & drop)
- Linking of ToDo lists, ToDos, documents and risk assessment with activities
- Central ToDo lists and Kanban boards
- Determine percent complete of an activity using ToDos

## Agile project planning

- Fast project creation with template management
- Support of the agile and hybrid planning methods
- Easy creation and editing of project plans
- Definition of employee, project or individual cost rates down to activity level
- Definition of billable status per activity and planned costs
- Project plan creation from quote items
- Capacity planning under consideration of approved and/or planned absences
- Resource planning without reservations
- Unlimited cross-project linking of activities in a multi-project structure
- Interactive GANTT view (drag & drop)
- Linking of To-Do lists, to-dos, documents and risk assessment with activities
- Central ToDo lists and Kanban boards
- Determine percent complete of an activity using ToDos

## Flexible budget and quote management

- Free definition of costs and investment types and their structure
- Top-down budget assignment for main and sub-projects monetarily and/or in man days
- Definition of budget defaults in time intervals (month/quarter/year)
- Quick definition of the budget through the transfer of 'plan' and 'actual' data
- Budget calculation based on profitability
- Target revenue recorded manually or based on confirmed quotes
- Quotes with freely definable status
- Definition of fixed-price or work performed quotes
- Quote value based on the project plan or freely-definable items
- Linking of quote items with activities and consideration of 'actual' values in billing
- Creation of activities from quote items
- Invoice proposals with payment deadlines for invoices based on quotes or actual data
- Invoice proposals by means of a serial function for freely-definable time intervals
- Linking of invoice proposals with milestones



## Project controlling

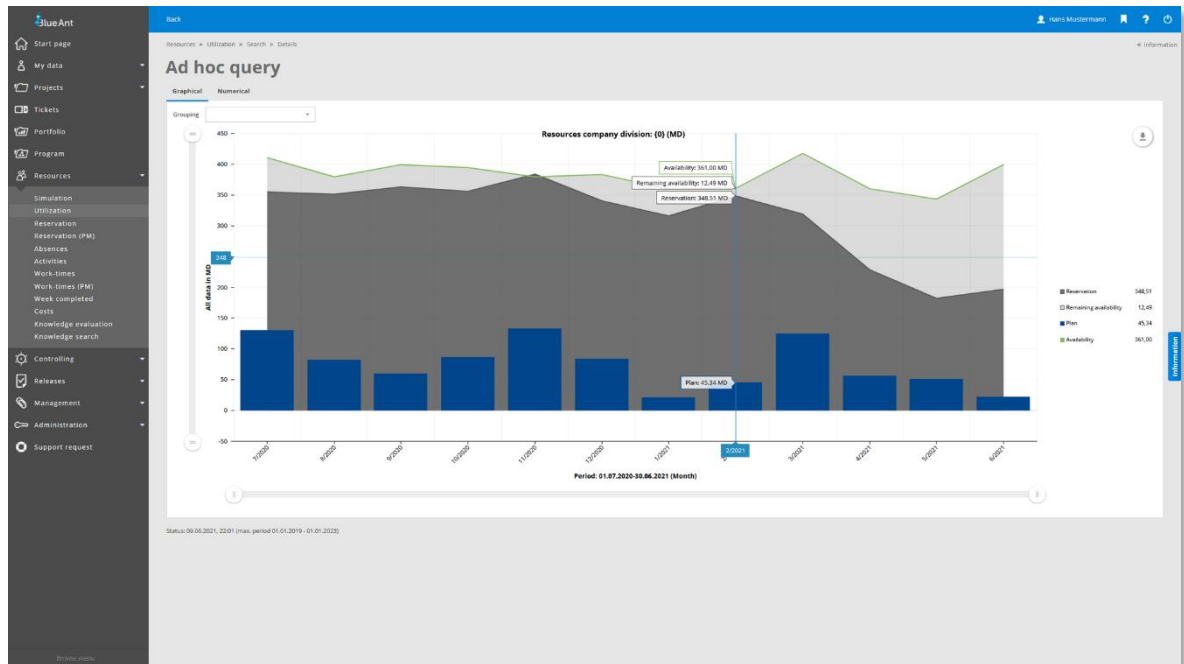
- Freely definable project life cycle (workflow and authorizations)
- Freely configurable status reports incl. delivery cycle and email dispatch
- Generation of key figures (efficiency, profitability, profit)
- Monthly plan notifications
- Evaluation of revenue according to the cost-to-cost method (CTC) or earned value method (EV)
- Dashboard control over all important information
- Expense forecasts and milestone trend analyses
- Quick and easy adjustment of completion at project and activity level
- Performance overview by means of comparisons (target, plan, basic plan, actual, estimated)
- Tabular or graphic development of expenses or residual expenses, completion and cost developments and earned value
- Cost and budget control
- Simple and fast adjustment of the planned values to estimated expenses
- Preparation of project billing
- Archiving of projects
- Report generator

## Risk and stakeholder management

- Freely configurable fields (e.g. status, probability and impact) for defining overall and individual risks
- Linking individual risks with activity planning
- Extension of risks by individual fields
- Evaluation and controlling of risks
- Quick and simple creation of all stakeholders
- Freely configurable fields (e.g. type, influence and conflict potential) for stakeholders
- Linking stakeholders to individual activities
- Involvement of stakeholders in status reporting
- Graphical evaluation of stakeholders



## 2. Resource management



**Optimal project resource utilization not only ensures the success of individual projects, but also has a positive impact on the entire project landscape.** Blue Ant helps you to recognize distortions in utilization planning of the project resources at an early stage and to initiate corresponding counter measures. Different work-time models, country-specific holiday calendars and individual skill profiles help you planning the utilization of project resources. Integrated approval processes for project resources, work-times, travel costs and absences in Blue Ant are automatically triggered and speed up coordination. The central project resource pool in Blue Ant gives you a quick overview of the actual use of resources. In the process, distortions in current projects can be identified and planning inconsistencies can be discovered in advance. Using the knowledge search in Blue Ant, you can quickly find suitable project resources for your project and request them from the respective resource manager. Staff utilization graphics and existing project reservations inform you in advance and give you planning security.

### Project resource costs

- Definition of work-time calendars/work-time models for resources
- Definition of resource cost-rates including historicisation
- Cost rates in hours, man-days or months
- Quick allocation of cost-rates according to resource's position
- Overview of availability and utilization

### Knowledge management

- Documentation of the available knowledge base in the company



- Resource/utilization planning across projects
- Virtual resources including replacement process
- Skills definition for all resources (knowledge management)
- Search for resources by required skills

### Reservation of project resources

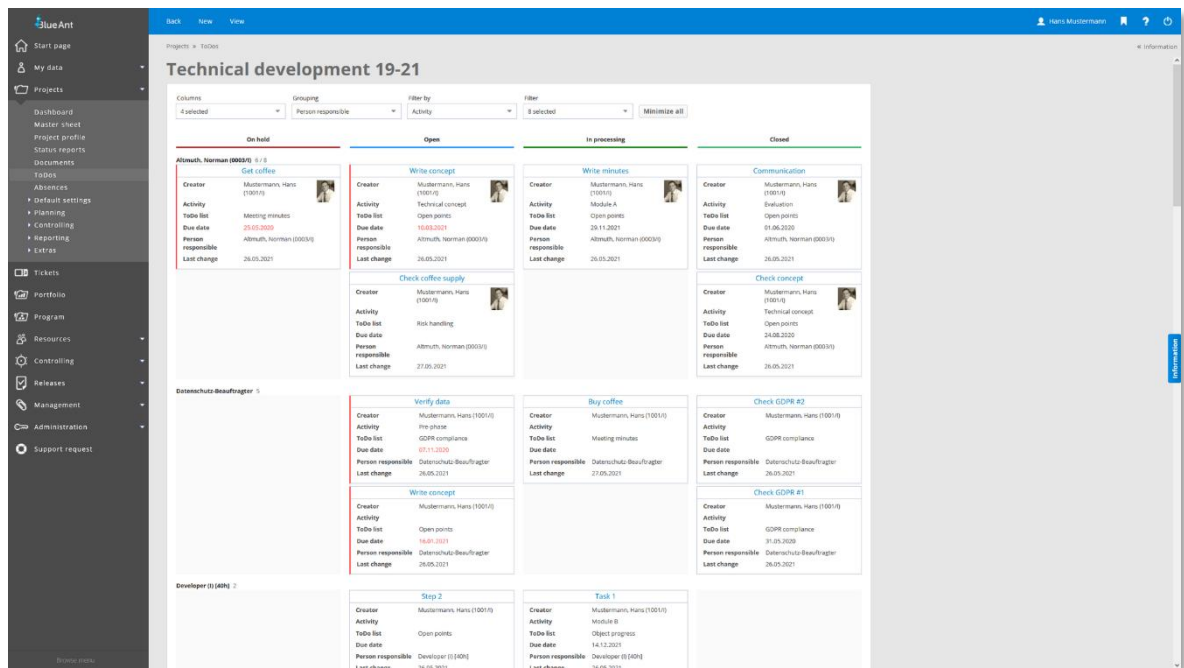
- Automatic identification of reservation periods
- Quick, cyclic resource reservation using the reservation plan
- Reserve real and simulated team resources (departments)
- Simulation of resources
- Resource, project and company forecast
- Requesting and approval of project resources
- Support of resource planning by the Resource Manager through the definition of required skills

### Management of project participants

- Display of project team calendars incl. event invitations
- Contact management, including corporate organization and cost centre structures
- Definition and billing of service times
- Holiday and absence management, including approval procedures
- Access to absence overviews via smartphone
- Resource calendar including export or linking of absences and public holidays



### 3. Kanban boards and ToDo lists



**A simple overview of all upcoming tasks and projects is one of the cornerstones of efficient project and portfolio management, guaranteeing complete documentation of the necessary work steps and at the same time helping you check the implementation status.** Kanban boards and ToDo lists allow you to keep an eye on everything. Blue Ant provides both the project manager and the portfolio manager with a Kanban board to easily organize pending ToDos or projects. With templates and a ToDo list import, standards can be defined for all projects in Blue Ant. From the processing of open points in an open points list to the checking of compliance with methods and process steps, ToDo lists in Blue Ant help you ensure project quality.

#### Kanban boards in projects

- Kanban board for all project ToDos
- Grouping function by activities, responsible persons, lists etc.
- Easy creation of new ToDos directly on the Kanban board
- Show and hide status columns
- Show and hide ToDo cards (e.g. for each activity or list)
- Notification of overdue ToDos

#### Kanban board on the start page

- Kanban board for project and ticket ToDos across projects
- Grouping function by projects, activities etc.
- Easy editing of ToDos directly on the Kanban board
- Show and hide status columns
- Show and hide ToDo cards (e.g. for each activity or list)
- Recording of work-times on activities via ToDos
- Notification of overdue ToDos



## Kanban board for portfolio and program

- Display of the project life-cycle using a Kanban board
- Grouping function by project type, priority, project manager etc.
- Open projects using the Kanban board
- Show and hide status columns
- Show and hide project cards (e.g. project type or manager)
- Change project properties simply by dragging on the Kanban board (e.g. project status, priority)

## Kanban board in Controlling

- Kanban board of all found ToDos
- Grouping functionality according to project, responsible persons, lists, etc.
- Show and hide status columns
- Show and hide ToDo cards (e.g. per activity or list)

## ToDo lists

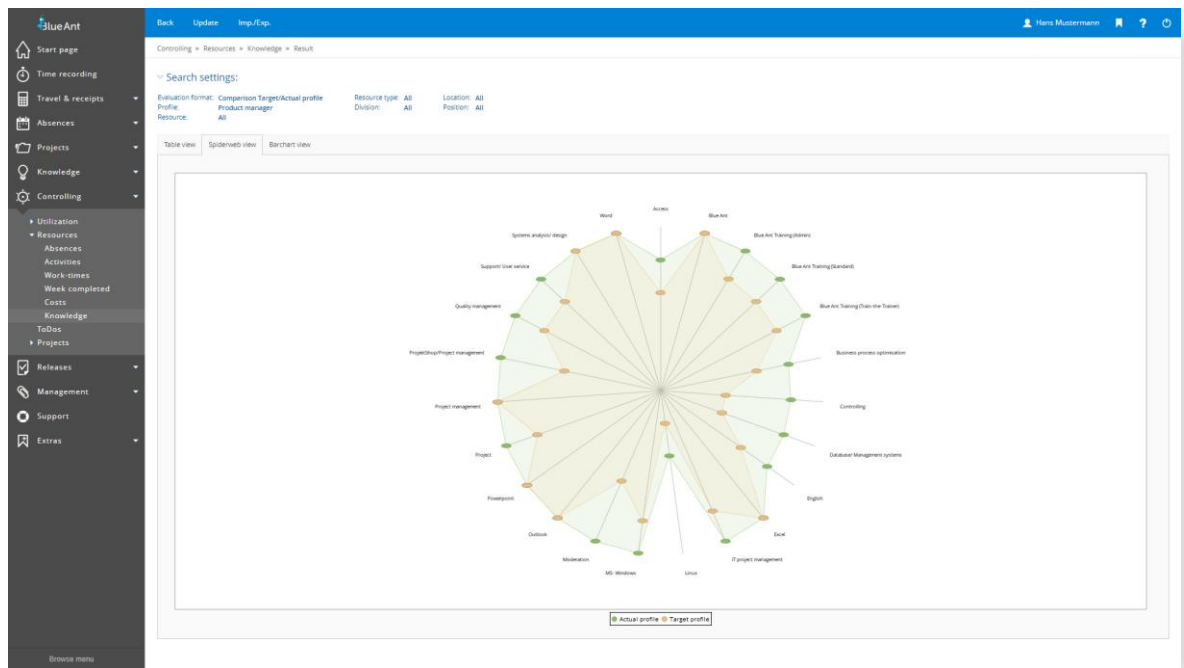
- Definition of any number of ToDo lists and ToDos in the project or ticket
- Linking of ToDo lists and ToDos with activities
- Determine percent complete of an activity using ToDos
- Free allocation of ToDos and reminder functions
- Kanban board for quick and easy editing of ToDos
- Automatic forwarding of completed ToDos
- Central control over completion of ToDo lists and ToDos using Kanban boards
- Bulk actions for ToDos

## Administrative tools

- Flexible status definition for ToDos
- Definition of templates
- Extension of the ToDos with customer-specific fields
- Cyclic import of ToDos from external systems



## 4. Knowledge management



**Knowledge is the key production factor of your projects.** Using knowledge maps and profiles in Blue Ant you always have an overview of your important project resources. With the help of the knowledge search in Blue Ant, you can quickly find suitable project resources for your project and request them from the respective resource manager. If necessary, resource utilization charts and existing project reservations inform you in advance of a project resource request and give you planning security.

### Manage knowledge

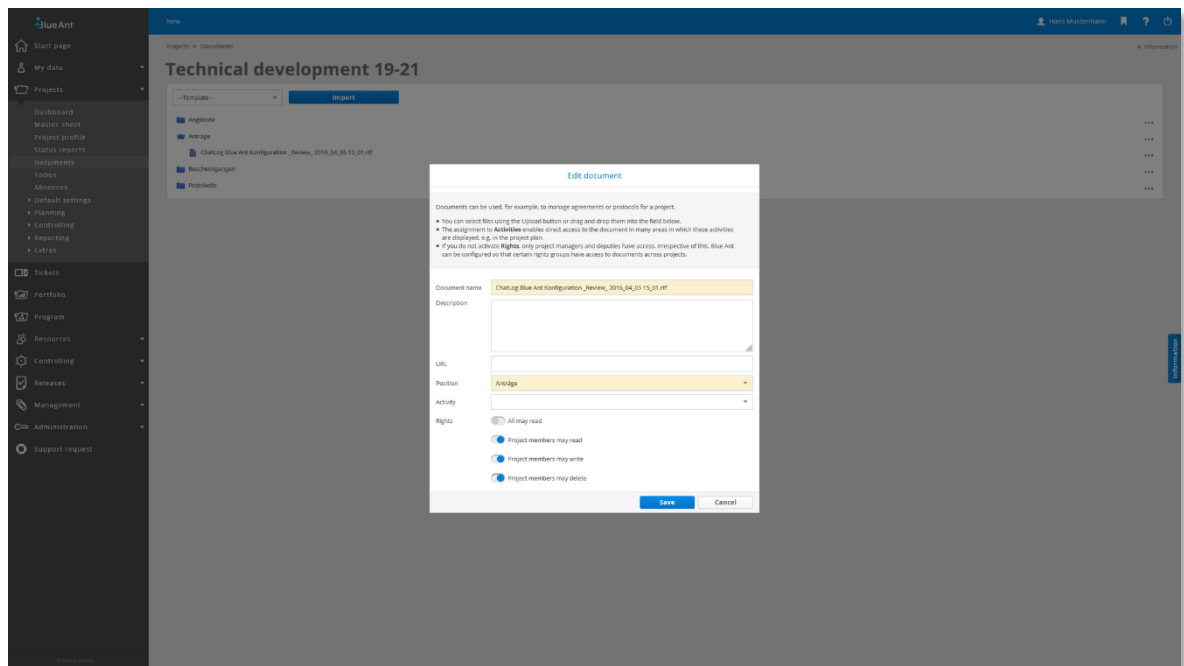
- Free definition of the knowledge tree
- Creation of target profiles for resources
- Allocation of skills and defined knowledge to resources
- Saved history of skill changes for development graphs
- Automated request for updating the knowledge profiles of resources

### Use knowledge

- Resource search via skills
- Knowledge maps in the form of bar, net or line charts
- Project resource requests incl. target skills
- Utilization mountains for each position (skills profile)
- Availability of free capacities of the required profiles



## 5. Project documentation



**Key results and concepts can be found in the project documentation.** Document versioning in Blue Ant, allows you to maintain an overview and project-related file storage guarantees fast access to required documents. Document storage allows you to centrally manage all project-relevant documents in one place. Changes to the project documents are registered at any time and documentation statuses are historicized. Complete project documentation in Blue Ant ensures that quality standards are met and creates transparency.

### Store project documents

- Free filing structure for projects and templates
- Integration into projects at the push of a button
- Filing of all documents
- Linking of documents and activities
- Storage of documents in tickets

### Find project documents

- Definition of keywords for quick document retrieval
- Free assignment of editing rights
- Versioning of all documents



## 6. Time recording

The screenshot displays the Blue Ant Time recording interface. The top navigation bar includes 'Start page', 'My data', and 'Time recording'. The main content area shows a weekly overview for the week of 2021-06-13 to 2021-06-19. The table has columns for days of the week, Total, Billable, % complete, Task, Comment, and Estimated. The data is organized by project and activity, with a total of 40.00 hours recorded for the week.

Project / Activity	Mon	Tue	Wed	Thu	Fri	Total	Billable	% complete	Task	Comment	Estimated
AA-Bau 2021 agf						00:00					
AA-Bau 3 agf						00:00					
AA-Bau-Projekt 5						00:00					
1 Projektmanagement						00:00		50			
2.3 Risikoprüfung						00:00		0			
3.1 Modul A						00:00		0			
3.2 Modul B		02:00	01:00	02:00		05:00		60	Training	Training Blue Ant	
3.3 Modul C						00:00		0			
3.4 Modul D						00:00		0			
AA-Bau-Projekt 8						00:00					
1 Projektmanagement						00:00		0			
2.1 Evaluierung						00:00		0			
2.3 Risikoprüfung						00:00		0			
3.1 Modul A						00:00		0			
3.2 Modul B						00:00		0			
3.3 Modul C						00:00		0			
3.4 Modul D						00:00		0			
Mein neues Projekt 2021_30						00:00					
1.1 Auftrag klären						00:00		50			
1.2 Fachkonzept erstellen						00:00		40			
Technik development 19-21						00:00					
3.1 Evaluation						00:00		90			0.00
3.2 Technical concept						00:00		99			0.00
3.3 Risk assessment						00:00		99			0.00
4.1 Module A						00:00		0			0.00
4.2 Module B						00:00		0			0.00
7.1 Training 1						00:00		0			0.00
8 Follow up						00:00		0			0.00
Training						00:00		0			0.00

**The recording of actual project costs is essential for effective project management.** Blue Ant supports the user with simple and flexible data entry options. Using time recording, you can easily and quickly record your work effort for projects, activities and tickets. Whether in the office or on the road, you have convenient access to your data with any Internet device. This saves a lot of time - your time. All times can be validated in Blue Ant with the help of approval workflows and confirmed by project or line managers. Approved work-times form the basis for cost allocation, accounting and data exports to other ERP systems.

### Quick recording

- Templates for work-time recording
- Quick and exact recording with the Stopwatch function
- Simple recording with day and week overviews
- Percent complete recording
- Display of the weekly quota and work that has already been booked
- Overall view of project and ticket work-times

### Comprehensive recording

- Time recording with calendar function and weekly overview
- Individual time recording incl. start and end time as well as break or duration
- Configuration of the recording type for each resource
- Recording of estimated overtime or remaining work
- Completion reporting of weekly work-times
- Completeness check of work-times based on the work-time model



- Specification of reasons for non-billable work-times, including consideration in billing
- Locking of the calendar week after completion report
- Recording of Clock in/Clock out times configurable for each resource

## Administrative tools

- Recording of work-times for other resources
- Transfer of work-times (across projects)
- Export of work-times including export ID and edit-lock
- Recording for each resource using 'From/To' times or by 'Duration'
- Recording of work-time intervals can be set for each resource
- Overbooking of activities configurable per project
- Limit recording of work-time to the activity period for each project
- Overbooking of role-specific quotas configurable per project
- Use of cost centres to accurately invoice hours worked
- Overtime account, including carry-over and flexitime bookings
- Selectable release processes for work times
- Collective transfers of work-times including releases
- Cyclical deadline rule for work-times
- Definition of free checking routines for recorded work-times (Batch run)
- Cyclical import of time recording from external systems



## 7. Ticket system/Task management

**Operational procedures such as ad hoc tasks, internal orders, change requests, and error messages take up both time and capacity and have to be dealt with promptly.** Using simple ticket management and an effective connection with the day to day business, Blue Ant provides seamless integration into resource management. With the ticket system in Blue Ant project management software, you can collect, process and monitor all tasks that arise, even independently of projects. So, ad hoc tasks are no longer overlooked.

### Ticket subjects and workflows

- Free workflow configuration, including responsibilities and notifications for each ticket type
- Assistance of support team
- Order of work and tasks for participants and creation of ToDos
- Support of reminder functions
- Quick recording using ticket templates

### Service level agreements

- Illustration of Service Level Agreements, including support time, reaction and warning times, as well as billing category
- Configuration of escalation and warning mechanisms
- Different cost rates

### Administrative tools

- Copying of tickets into existing or new activities



- Creation of new activities from a ticket
- Creation and editing of tickets via email via any email account, including domain white lists
- Full integration into work-time recording, project management, evaluation and controlling
- Seamless integration of all plan and actual values in resource management
- Escalation via smartphone
- Thematic linking of tickets with projects and/or activities
- Invoicing of tickets via project billing



## 8. Travel costs in the project

Receipt no.	Date	Description	Receipt type	Activity	Gross	Net	Billable	Invoice	Editing note
RK-2090-0002	31.07.2014	Hotel	Hotel		60.00	56.07		56.07	München
RK-2090-0001	31.01.2014	Flug	Flight		0.00	0.00		0.00	München
					60.00	56.07		56.07	

**In addition to work costs, material and travel costs are also incurred in projects. Blue Ant provides the necessary workflows and approval processes for swift, professional processing.** Integrated travel cost recording helps you to record your travel expenses directly to the appropriate project in a tax-compliant manner. Automated checking and approval processes in Blue Ant ensure short processing times, whereby expenses can be reimbursed quickly and the costs can be passed on to the client. Material costs and investments can be easily entered and posted to projects with document management in Blue Ant. Both travel and material costs can be imported from your accounting department or exported as complete accounting records for your accounts department. Expenses management for all staff completes the service package.

### Receipt request and recording for everyone

- Create requests for receipts, costs (e.g. business trips) and investments
- Quick and simple recording of receipt and travel costs by resources
- Document storage for each combined or individual receipt
- Transfer of requests to combined and individual receipts
- Transfer of a combined receipt (travel expense report) to an approval process
- Expenses management for each resource

### Administrative tools

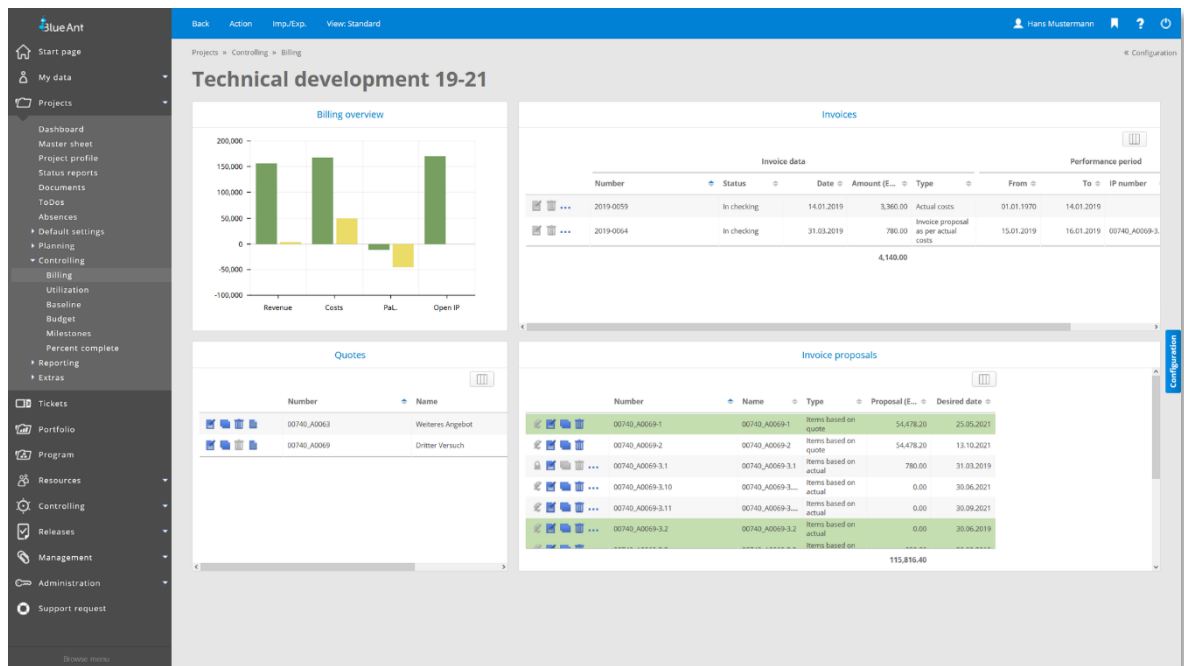
- Free definition of combined and individual receipt types
- Individual workflows for combined receipt types
- Fixed invoicing values for combined receipts and receipt types per project
- Free configuration of control mechanisms for request checking and approval



- Calculation of expenses (Germany, Austria), mileage allowances, VAT rates and benefits in kind such as breakfast, lunch and dinner and their historisation
- Calculation logic definable for each employee's daily allowance (based on calendar days, blocks of 24 hours or 24 hours/Austria)
- Simple updating of expenses, mileage allowances and benefits in kind via import
- Consideration of fixed or differing exchange rates
- Simple updating of expenses and mileage allowances in project billing
- Export of receipts for booking
- Cyclic import of receipts from external systems



## 9. Project billing



**Project services are not provided for their own sake, but to achieve a goal. Both stringent costing and billing form the foundations of sustainable project management.** This applies to both external and internal projects. Blue Ant automatically prepares proof of the work performed and project costs incurred. All project costs (work, material and travel costs) can be validated through checking and release mechanisms, compiled within the project billing and invoiced. Both billable and non-billable work can be selected in Blue Ant according to any criteria, transferred to an ERP system or output in their own forms (invoices, service certificates etc).

### Fast selection of work performed

- Selection of all costs relevant for billing
- Adjustment and processing of billing data at field level
- Adjustment of recorded work-times for projects and tickets to agreed billing intervals
- Warning if billable services are not released in the billing period.
- Overview of all non-billed work

### Easy preparation of activity confirmations and invoices

- Printable display of work-times
- Optional display of all non-billable work
- Fixed or automatic project billing
- Partial billing of tickets
- Electronic billing as X-Rechnung, ZUGFeRD and according to the EN-16931 standard for export in XML format

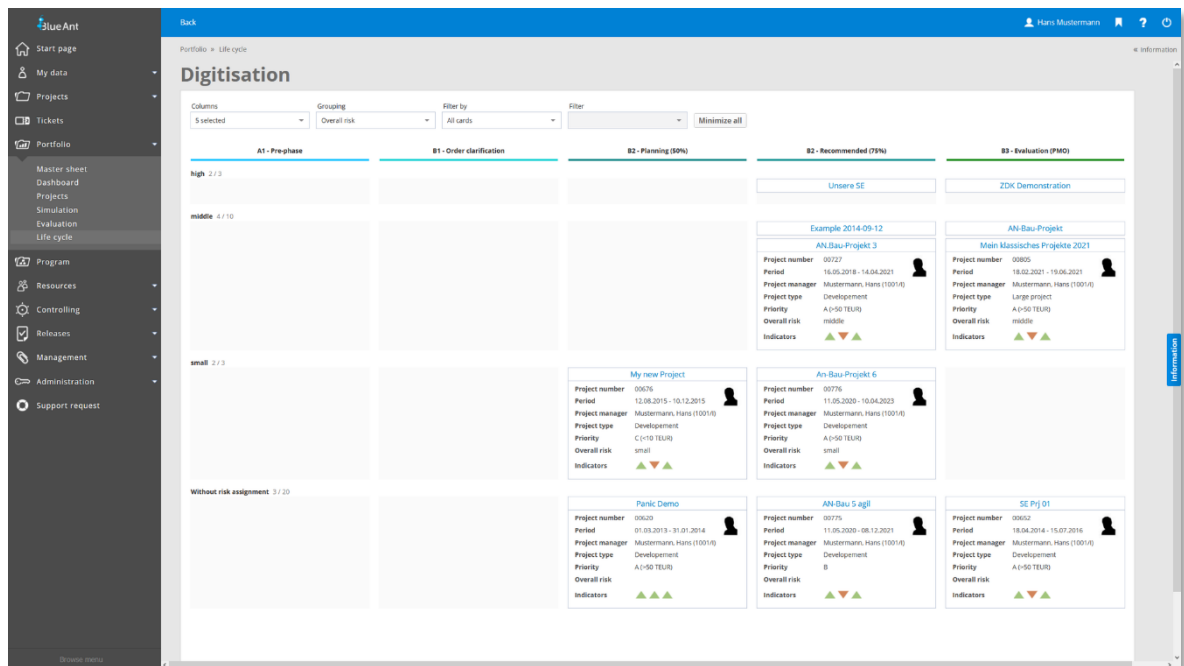


#### Administrative tools

- Partial or complete cancellation of invoices
- Rounding and capping functions for each invoice
- Invoice layout definable per client
- Status freely configurable (e. g. "In checking", "Released") for each invoice
- Consideration of exchange rates including history



## 10. Project portfolio



**Portfolios cluster projects for controlling and also serve multi-project management. Project environments can be visualized and evaluated better as a result.** Using the project portfolio visualization in Blue Ant, you can display complex project landscapes and evaluate them graphically. In this way, you can answer a wide range of questions about your multi-project management landscape. Blue Ant project portfolio management helps you structure and monitor all projects and measures running in the company. Thanks to the close interlocking of the project portfolio with individual project and resource management, you no longer lose sight of your overall goals. Administrative tools in Blue Ant allow you to model the entire project landscape. Key figures can be generated at the push of a button in Blue Ant across all levels (projects, departments, programs, and portfolios).

### Management of project portfolios

- Creation of any number of project portfolios
- Kanban board for managing the project life cycle
- Completion of individual project portfolio properties (risks, key figures, etc.)
- Quick assignment of projects by drag & drop and multiple selection
- Central management of project status, project duration, project start and end dates
- Simple assignment of projects to portfolios



## Simulation of project portfolios

- Creation of any scenario
- Import of all projects in a portfolio
- Ad hoc creation of new projects
- Definition of different project priorities
- Reschedule, extend, shorten projects
- Real-time checking of all changes for capacities and budget
- Conflict resolution down to the resource or skill level
- Transfer of project changes and ad-hoc projects to live operation using templates
- Consideration of the company organization chart for different views
- Display of the remaining load of line work
- Reference to program or main project specifications

## Rights for portfolio managers

- Definition of persons responsible with their own rights system
- Optional assignment of project specific rights within the portfolio
- Grouping of rights
- Rights definition up to field level

## Visualisation of project portfolios

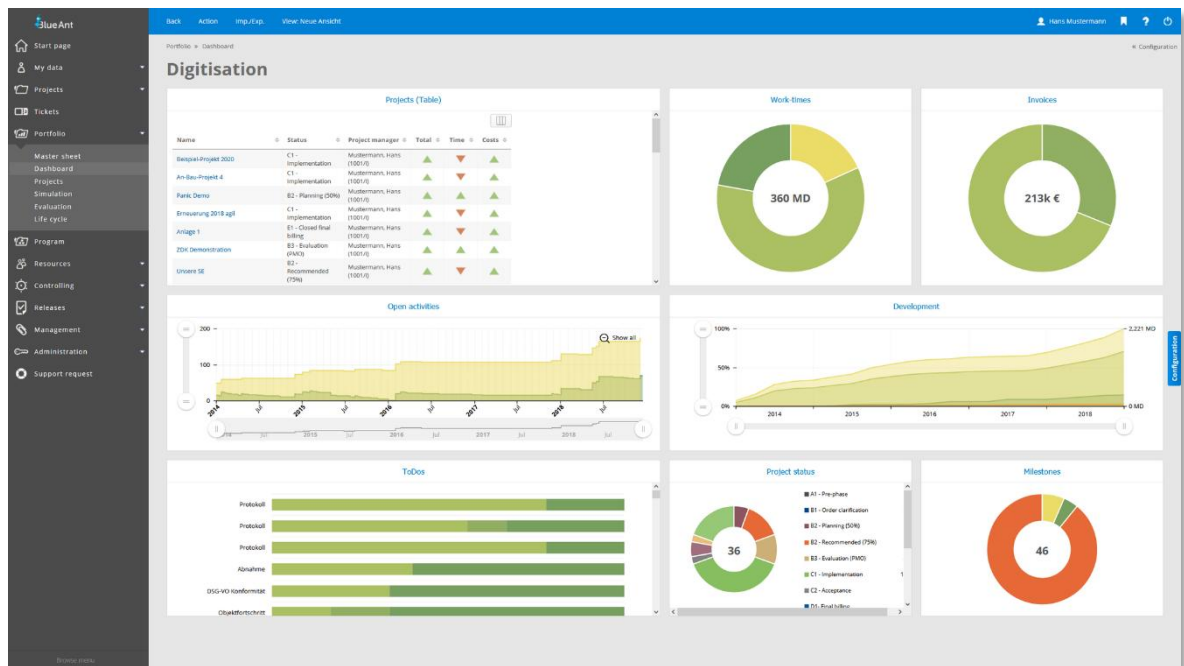
- Dashboard overviews with all important information
- Project landscape as GANTT chart
- Portfolio evaluation as bubble chart
- Individual reports with BIRT

## Display in project portfolio dashboards

- Overall development
- Progress and work effort
- Project life cycle – overview of all projects
- Burn down chart of all open tasks
- Project status overview
- Project milestone overview
- Drill down function of portfolios at project level
- Graphical and tabular output of the portfolio
- Export of data to HTML, PDF or CSV



## 11. Project programs



**Programs combine all projects with the same orientation into a primary objective and facilitate management and controlling. All relevant projects and activities can be visualized and evaluated collectively with the program function.** Using program visualization in Blue Ant, you can structure and organize complex project structures. Blue Ant project program management helps you structure and monitor all projects and measures running in the company with regard to the overall goal. Thanks to the close interlocking of the program function with the individual project and resource management, you will not lose the overall or detailed perspective. Administrative tools allow you to model the entire project landscape. Key figures in Blue Ant can be generated at the push of a button across all levels (projects, departments, program, portfolios).

### Management of project programs

- Creation of any number of project programs
- Kanban board for managing the project life cycle
- Specification of max. permitted number of projects
- Completion of individual project program properties (risks, key figures, etc.)
- Quick assignment of projects by drag & drop and multiple selection
- Central management of project status, project duration, project start and end dates
- Simple assignment of projects to portfolios

### Simulation of programs

- Creation of any scenario
- Import all projects of a program
- Ad hoc creation of new projects
- Definition of different project priorities



- Reschedule, extend, shorten projects
- Real-time checking of all changes for capacities and budget
- Conflict resolution down to the resource or skill level
- Transfer of project changes and ad-hoc projects to live operation using templates
- Consideration of the company organization chart for different views
- Statement of the remaining load of the line work
- Notes on main project specifications

### Rights for program managers

- Definition of persons responsible with their own rights system
- Optional assignment of project specific rights within the program
- Grouping of rights
- Rights definition up to field level

### Visualisation of project programs

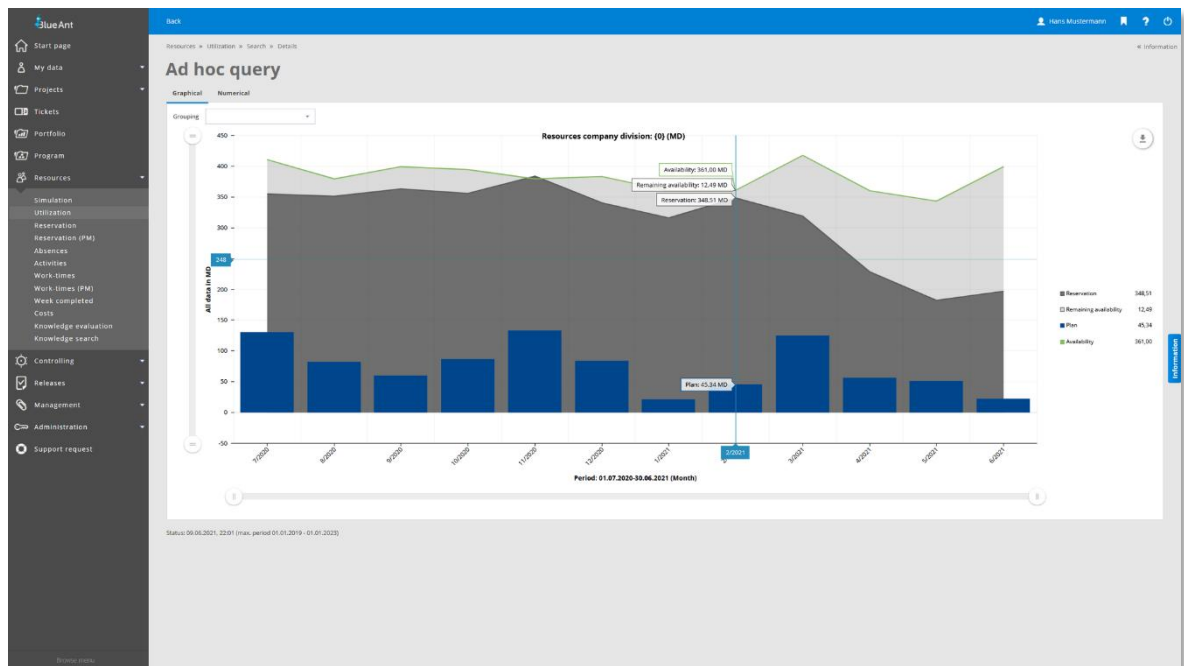
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### Display in project program dashboards

- Overall development
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- Project life cycle – overview of all projects
- Burn down chart of all open tasks
- Project status overview
- Project milestone overview
- Drill down function of programs at project and activity level
- Graphical and tabular output of the portfolio
- Export of data to HTML, PDF or CSV
- Access to all project data



## 12. Controlling



**Process complex issues quickly and clearly in order to make the right decisions; this is the essential aim of project controlling. Blue Ant's multi-project management Controlling can help.** All data entered in the context of multi-project management is available in project control for detailed evaluations and reports. Whether current capacity utilization situations or future capacity utilisation scenarios - with just a few clicks you can obtain all the information you need for your project evaluation in real time. Thanks to the integrated modular system in Blue Ant for your own reports, you can have standard key figures and company-specific key figures calculated based on current individual projects. Freely definable project lifecycles allow different participants to intervene in time in the form of release and approval processes.

### Portfolio simulation

- Creation of any scenario
- Import of all company projects
- Ad hoc creation of new projects
- Definition of different project priorities
- Reschedule, extend, shorten projects
- Real-time checking of all changes for capacities and budget
- Conflict resolution down to the resource or skill level
- Transfer of project changes and ad-hoc projects to live operation using templates
- Consideration of the company organization chart for different views
- Statement of the remaining load of the line work
- References to program or main project specifications



## Project reports and project evaluation at the touch of a button

- Costs and budget
- Budget management
- Project work costs
- Resource work costs
- Work effort
- Utilization of live or precompressed data
- Cost centre evaluation
- Client revenue
- Status reports
- Revision-proof release of plan notifications for revenue deferrals

## Forecasts and analysis ad hoc

- Project landscapes
- Baseline evaluation
- Percent complete developments
- Earned value analysis
- Milestone overview
- Work and remaining work developments
- Revenue evaluation and deferral using cost-to-cost and earned value methods
- Reporting and approval process for revenue evaluations

## Project resource utilization

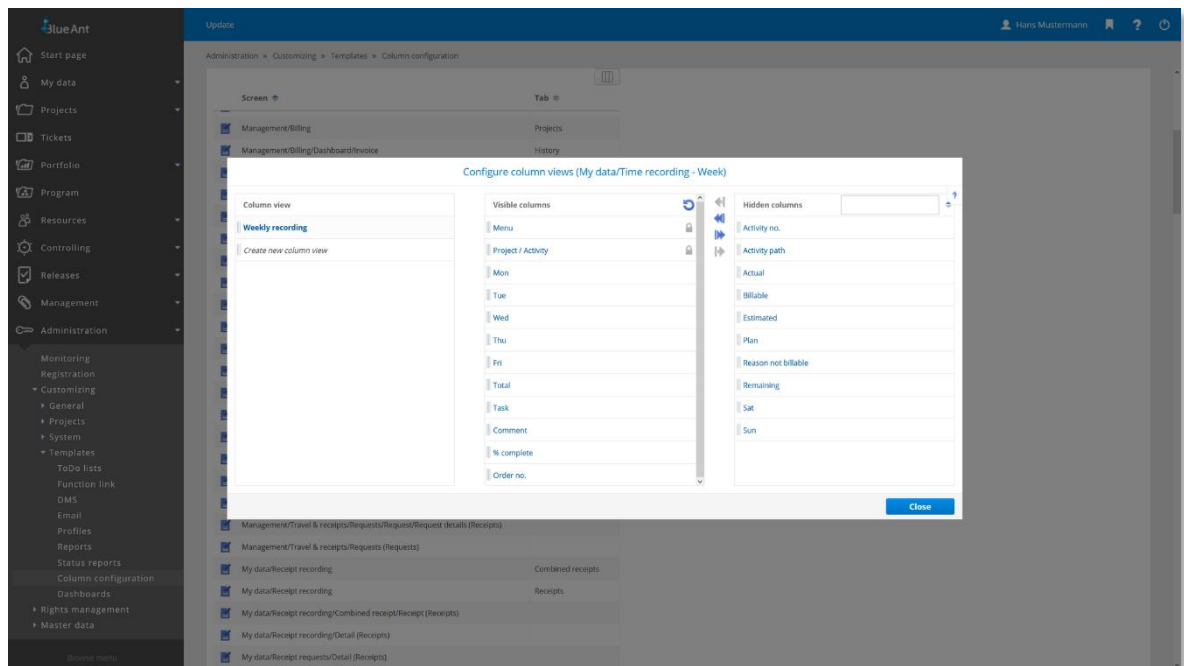
- Comprehensive, cross-project utilization views
- Tabular and graphical display of the project landscape
- Quickly reschedule/extend projects
- Different views on company, project or resource level, for example
- Resource activities
- Numerical and graphical displays
- Overtime forecast

## Administrative tools

- Free report configuration including calculation formula
- Scheduled, automated report generation and distribution via email
- Creation of report templates
- Integration of individual report output (MS Office, PDF)
- Assignment of report templates to user groups
- Direct link of evaluations to individual projects and/or main and sub-project structures



## 13. Administration



**Project management solutions not only have to work well, but must also be easy to administer. Blue Ant customers value the fact that our software can be adapted to changing requirements at any time.** With Blue Ant, you get a web-based software solution of the newest generation, which can be easily adapted to your needs via the web interface. You can configure approval workflows, create rights profiles, manage web services for mobile applications and enter master data. Maintenance and servicing of the system are therefore accelerated and administrative effort is reduced. Blue Ant supports both the technical and business administration.

### Flexible user interface

- 100% full web capability
- Output to mobile devices with compatible browsers
- Intuitive operation
- Individual design of the start page and various other settings or use of profiles
- Any language and format support (date, time, duration, numbers)
- Simple and advanced search with predefined search settings
- Preconfigured user views and tables
- Ad hoc configuration of user views and tables
- Compressed data overview through index cards
- Complete adaptation of all texts, fields etc. to the corporate language
- Freely definable menu entries

### Extended customizing

- Individual fields, including calculation, screens and sections/tabs with control of visibility throughout the whole system



- Import/export of individual fields
- Linking of free fields with other systems by URL-call
- Customer-specific reports with BIRT report generator
- Send individual reports automatically by email or store them in different storage services such as a file system
- Configurable workflows
- Master data management and translation
- Individual settings for each resource and project
- Template definition for documents, emails, projects and ToDo lists
- Format definition, pre-allocation of project numbers, quote numbers, invoice numbers, combined receipt numbers and individual receipt numbers
- Definition of column configuration
- Any exchange rate including history
- Integrated Business Intelligent Reporting Tool (BIRT)
- Administration dashboard with all important technical system information

### Easy rights management

- Any allocation for users and/or user groups
- Individual storage of project related user rights
- Definition of visibility of resources, project and controlling data for every resource using the internal organizational structure
- Unlimited alias user names
- Extra access rights for web services
- Import/export of rights groups and their profiles



## 14. Add-ons

### For mobile devices

- Direct access using responsive design without an additional app
- Recording of work-time on available projects and tickets
- Percent complete recording
- Overview of all recorded work-times of the account used

### For JIRA

- Create Jira issues from Blue Ant activities
- Transfer Jira worklogs as work-times to Blue Ant activities
- Transfer the remaining effort from Jira issues as estimated effort to Blue Ant activities

### For Azure

- Import resources and user data via connector
- Create Blue Ant activities or Todos from Azure work items via connector
- Transfer numerical values from Azure Boards tasks to Blue Ant activities either as planned effort (in hours or days) or in numerical individual fields.

### For AI agents

- The MCP tools provided enable read-only access to selected Blue-Ant data for analysis, evaluation, and other AI-powered use cases.

### For MS Project

- Import/export of project plans with MS project

### Supported process models and standards

- GPM/IPMA
- ISO 69901
- PMI/PMIBOK
- Prince 2
- V-model
- Individual procedures



## 15. Interfaces

	Standard Edition	Enterprise Edition	Cloud Edition
Plugin for MS Project	●	●	●
Export of all data to PDF, HTML and MS Office	●	●	●
SWOT interface for quotes and plan and actual data	●	●	
Import/Export of activities including individual fields (MS Excel)	●	●	●
LDAP/ActiveDirectory connection for Resource data and company divisions User groups and user authentication	●	●	●
Azure Connect for Importing resources and user data Connecting Azure Boards	optional	●	optional
SSO access via SAML 2.0 with AD FS, OpenID or Kerberos 5	optional	●	optional
<b>Blue Ant Connect</b> Connectors for relational databases, MS Excel, CSV files, SAP, Navision, Sage, DATEV and many more for the  Import of absences, quotes & quote items, invoice proposals & items, work-times, team resource work-times, receipts, users & user groups, budget targets, individual risks, clock in & clock out, resources/contacts, organisation chart, planned costs, projects, invoices, ToDo lists incl. ToDos, companies  Export of absences, quotes & quote items, invoice proposals & items, work-times, receipts, users, budget targets, individual risks, clock in & clock out, resources/contacts, planned costs, projects, invoices	●	●	●
Jira Connect for Cloud and Data Center	optional	●	optional
AI Connect Data Access	optional	optional	optional
Web Services (SOAP / REST)	optional	●	optional
Webhooks	optional	●	optional
External links to Blue Ant functions	●	●	●
Integration option for blogs, wikis, forums and other web applications	●	●	●



## 16. Blue Ant Module/Functions

	Standard Edition	Enterprise Edition	Cloud Edition
Blue Ant			
Basic	●	●	●
Portfolio and program management*	optional	●	optional
Ticket system	optional	●	optional
Smart Projects Basic	optional	optional	optional
Master data management and Customizing	●	●	●
Rights management	●	●	●
Multi-lingual capability	●	●	●
Interfaces			
MS Project	●	●	●
LDAP/ActiveDirectory	●	●	●
Azure Connect**	optional	●	optional
SSO	optional	●	optional
Web Services (SOAP / REST / Webhooks)	optional	●	optional
Jira Connect	optional	●	optional
Blue Ant Connect	●	●	●
AI Connect Data Access	optional	optional	optional
Individual customization	optional	optional	
Piloting of the solution	optional	optional	optional
Purchase	●	●	
Rental	●		●

\*Simulation module for project resources: Part of the add-on module "Program and portfolio management" of the Enterprise Edition from version 13.6. Customers who have purchased the Enterprise Edition before this version can purchase the simulation module for a fee.

\*\*Azure Connect: Part of the Enterprise Edition from version 15.3. Customers who have purchased the Enterprise Edition before this version can purchase the simulation module for a fee.

