Blue Ant

Blue Ant
Update Information 26.2

Dear users,

This document provides an overview of the new functions and functional enhancements available to you with Blue Ant version **26.2**.

With this version, we are extending the **MCP** integration to include **project-related billing data** (page **4**). This makes it possible to trace quotation, proposal and invoice data for each project, including the respective billing status. The same billing data categories are also available in the **Smart Projects** prompt library. **MCP tools** now enable AI agents to search for and filter projects specifically by **individual fields** in the Project context (page **5**), using different field types and suitable comparison operators.

Version 26.2 also includes the following enhancements:

- New dashboard widget for stakeholder analysis (page **7**)
- Risk matrix in the risk module (page **10**)
- Enhancements to XRechnung (page **16**)
- Expanded REST service functionality (page **20**)

Should you have any questions or suggestions, we look forward to receiving your feedback at blueant.de.

The Blue Ant team wishes you every success with your project work.

Your Blue Ant Team

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1. AI Connect & Smart Projects

With this version, we are adding further features to the **MCP** integration and **Smart Projects**.

MCP tool for billing information

The **Get project billing data** tool is now available for connecting AI assistants via MCP. It provides project-related billing data that could not previously be retrieved through the existing evaluation tool.

Separate permission management

As with all MCP tools, access to **Get project billing data** can be controlled specifically through the permissions system.

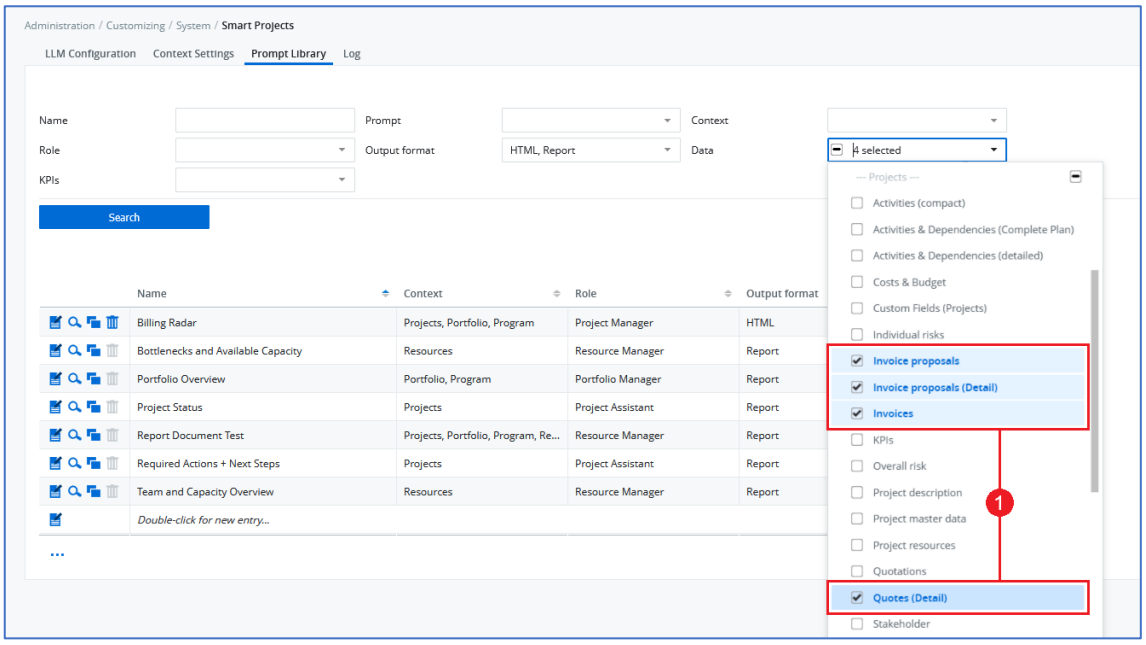
Included data categories

Data category	Content
Quotations (*quotes*)	Project quotations including amount, status, billed amount and links to invoice proposals
Quotation line items (*quotes_details*)	Individual quotation items including quantities, units, billing status and associated activities
Invoice proposals (*proposals*)	Overview of all invoice proposals including planned revenue, amount, requested date and link to the issued invoice
Invoice proposal line items (*proposals_detail*)	Individual items for each invoice proposal
Invoices (*invoices*)	Issued invoices including amount, invoice type, status (e.g. Released, Under Review) and links to quotation and invoice proposal

This makes it possible to trace quotation, proposal and invoice data for each project, including the respective billing status.

Prompt library expanded to include billing information

The same **billing data categories** are also available in the **Smart Projects** prompt library **(1)**. Users can create AI-powered analyses and reports based on quotations, invoice proposals and invoices directly within projects and portfolios using administrator-defined prompts.



New billing information in the project context

MCP tools: Extended project search using individual fields

AI agents can now search for and filter projects specifically by individual fields in the Project context. Different field types and suitable comparison operators can be used, allowing projects to be found by text, numeric values, dates or listbox selections.

Supported options include:

- Equality and inequality comparisons
- Value ranges, for example for numbers or dates
- Greater-than and less-than comparisons
- Multiple values and listbox selections
- Text comparisons such as “starts with” or “ends with”

Multiple individual fields can also be used as filter criteria in a single project search.

Automatic resolution of individual fields

The AI agent can identify a individual field by its name or business meaning and independently resolve the technical field definition required for the search.

For listboxes, user-friendly selection values can also be mapped to the required technical values.

Users therefore do not need to know technical IDs or internal individual-field values.

Control filtering and data output independently

Individual fields used to search for projects do not automatically have to be included in full in the AI agent's response.

Existing options for limiting returned properties make it possible to output only the individual fields actually needed for the analysis.

This keeps the amount of transferred data low, even for extensive project structures.

Restrictions for memo fields

Memo fields cannot be used as filter criteria in project searches.

This restriction applies to both:

- Blue Ant internal memo fields and
- individual fields of the Memo Field type

Memo fields therefore cannot be searched using **customFieldsFilter** or the corresponding filtering options for internal Blue Ant fields.

This restriction applies only to filtering. If the respective memo field can be returned by the endpoint, its content can still be included in the response.

Benefits for you

With the enhanced project search, AI agents can use your company-specific project information much more precisely for queries and analyses. Users describe their requirements using familiar field names and values, while the technical resolution takes place in the background.

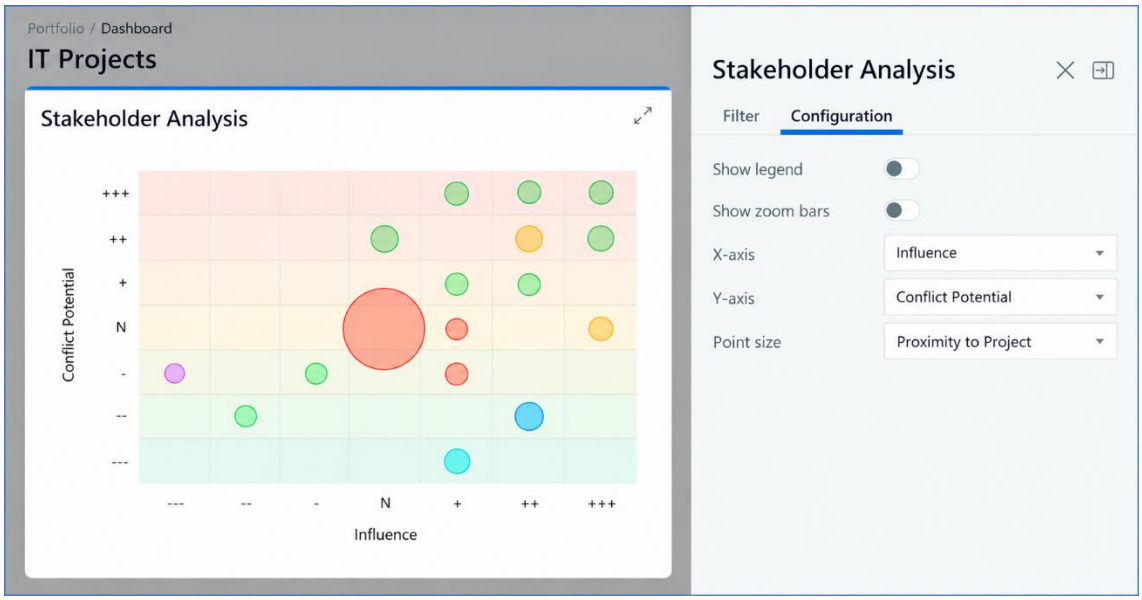
This enables custom project structures to be incorporated into AI-powered analyses without knowledge of technical IDs. At the same time, returned data can be limited to the information actually needed, resulting in more precise answers, more efficient processing and lower resource and token consumption.

2. Dashboards

New widget for stakeholder analysis

Stakeholders are individuals or groups with a legitimate interest in the progress or outcome of projects. The **Stakeholder Analysis** dashboard widget provides a graphical evaluation of stakeholders based on three selected attributes.

Various stakeholder characteristics can be used as evaluation criteria, such as **influence** or **conflict potential**. The widget is particularly useful for identifying and assessing all individuals, groups, or organizations that are affected by or can influence a project.

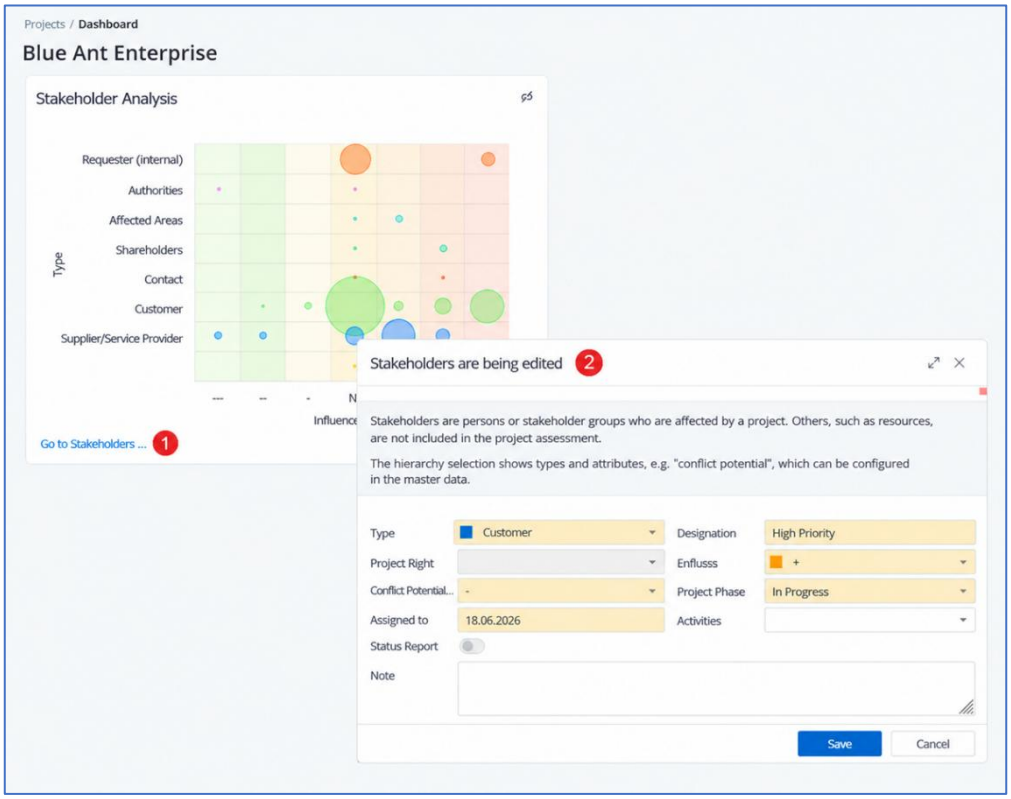


New widget in the portfolio dashboard

The widget is available in the following dashboards:

- START PAGE
- PROJECTS / DASHBOARD
- PORTFOLIO / DASHBOARD
- PROGRAM / DASHBOARD

Under PROJECTS / DASHBOARD, stakeholders can also be edited directly **(2)**. For additional details, use the integrated link **(1)** to navigate to PROJECTS / PLANNING / STAKEHOLDERS.



Link and stakeholder editing under PROJECTS / DASHBOARD

Note:

The widget is not initially available for selection on the START PAGE. An administrator must grant access through the permissions system.

Risk Matrix widget updated

Individual risks can now be opened **directly** in the editing dialog **by clicking** them in the risk matrix. If several risks are present, the individual entries are available in the tooltip. This allows risks to be edited without leaving the dashboard. The new editing function is available in the following dashboards:

- PROJECTS / DASHBOARD
- PORTFOLIO / DASHBOARD
- PROGRAM / DASHBOARD

To edit a risk using the editing pop-up in the portfolio and program dashboards, an administrator must grant access through the permissions system. Users require write permission for **Risk Details (Pop-up Window) (screen)** in the navigation path of the portfolio dashboard (PORTFOLIO / DASHBOARD) or program dashboard (PROGRAM / DASHBOARD).

Column configuration extended in Billing widgets

The column configuration of the widgets on the billing dashboard has been extended to include **individual fields**:

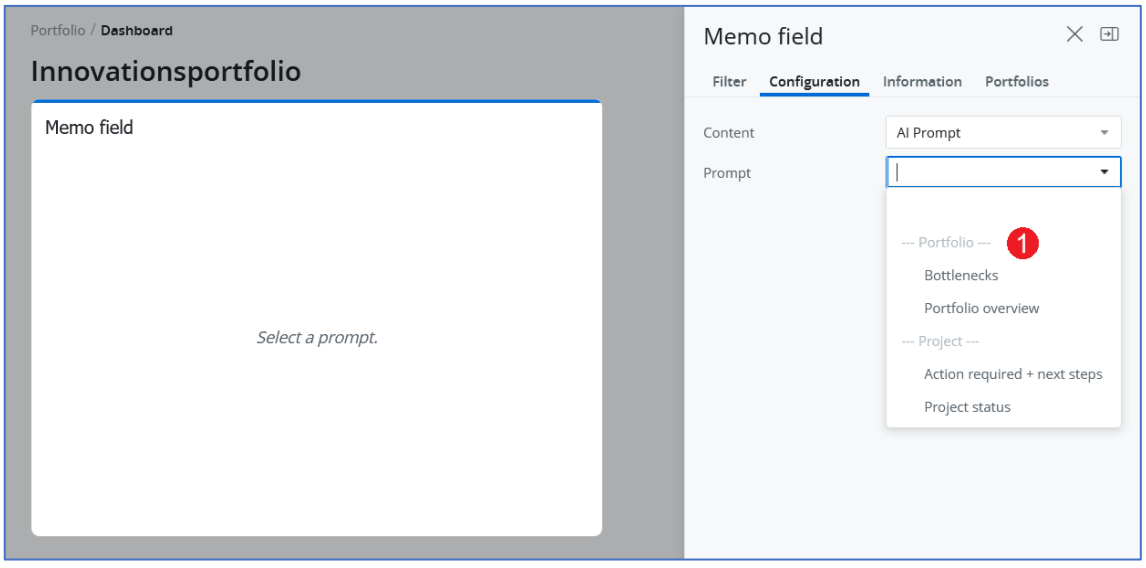
- **Quotes** widget
  - individual fields from the **Quote** and **Project** contexts
- **Invoices** widget
  - individual fields from the **Invoice** and **Project** contexts
- **Invoice Proposals** widget
  - individual fields from the **Invoice proposal**, **Quote** and **Project** contexts

This applies to the following screens:

- PROJECTS / CONTROLLING / BILLING
- MANAGEMENT / BILLING / DASHBOARD

Memo field widget extended

The available contexts in the **Memo Field & AI** widget on the portfolio and program dashboards have been extended. The **individual memo fields** and **AI prompts** now also support the **Portfolio (1)** and **Program** contexts.



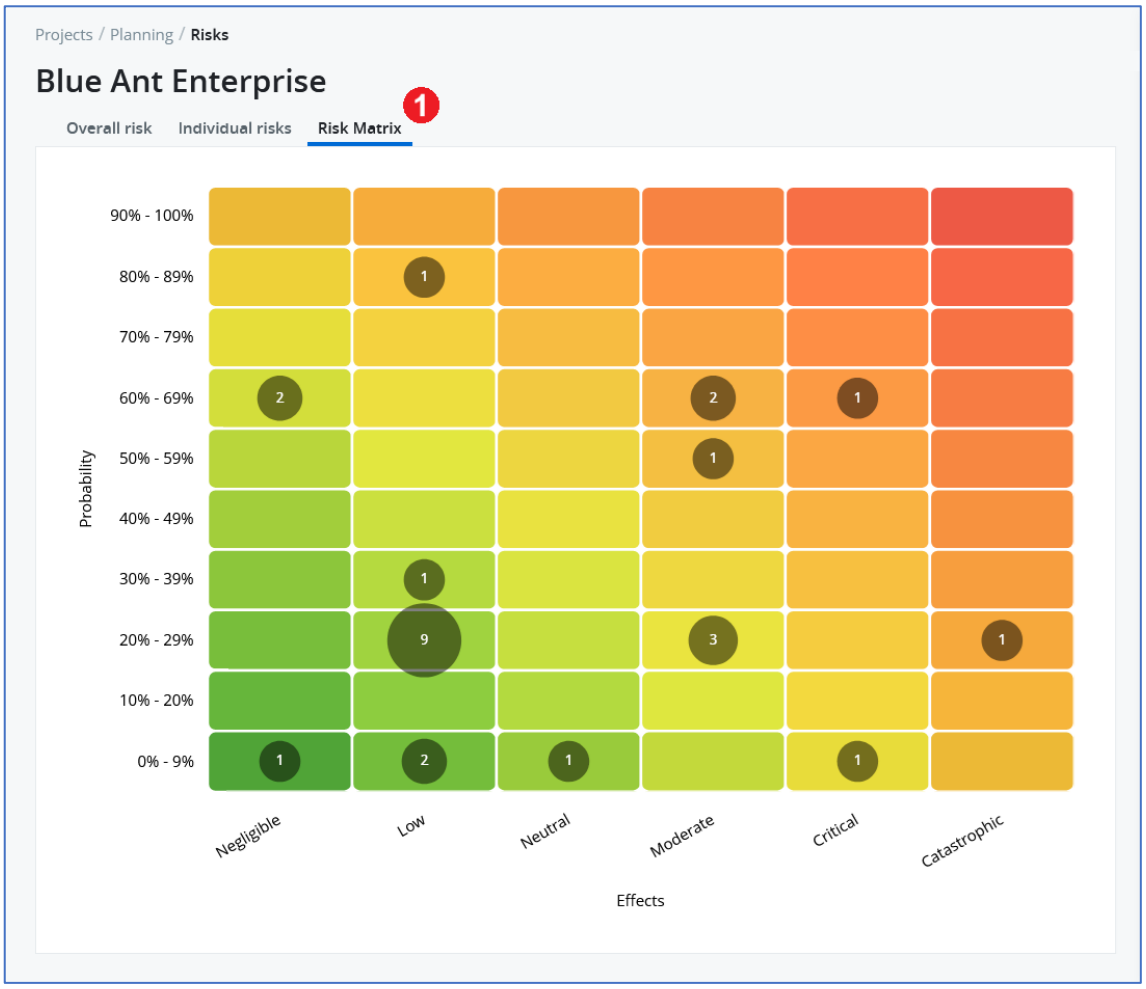
Additional portfolio context in the portfolio dashboard

If an AI prompt supports **multiple** contexts (Portfolio/Program, Project), the **Portfolio/Program context** is used.

3. Projects

Risk matrix in the risk module

The **Risk matrix** is now available as a separate tab **(1)** in the project risk overview under PROJECTS / PLANNING / RISKS. It provides a clear visualization of risks based on **probability** and **effect**.



Risk matrix as a separate tab under PROJECTS / PLANNING / RISKS

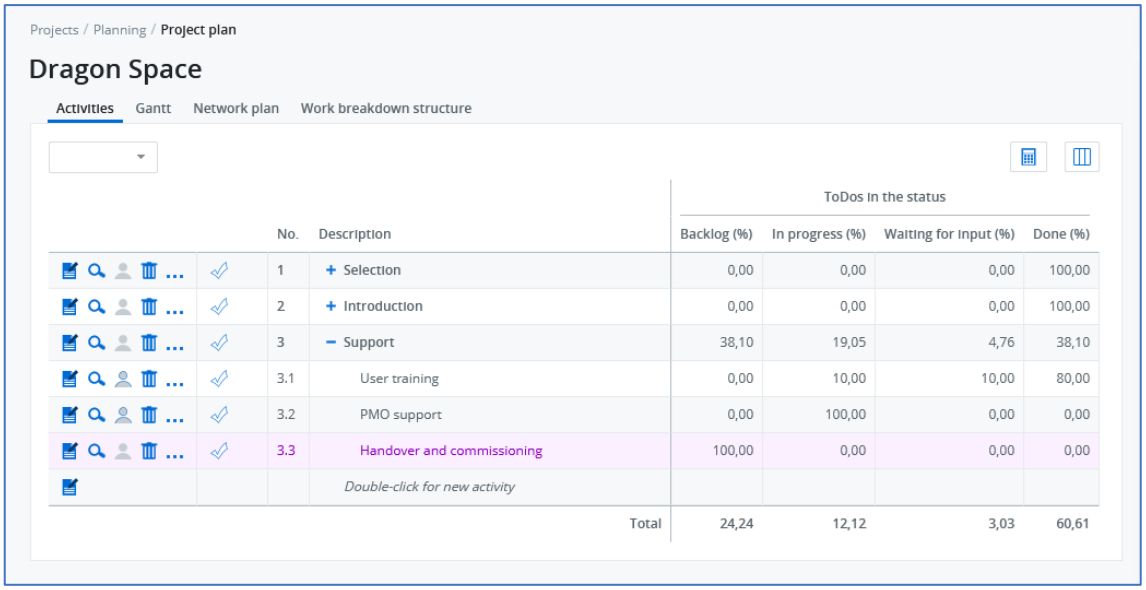
Individual risks can now be opened directly in the editing dialog by **clicking** them in the risk matrix. Where multiple risks are present, the individual entries are available in the tooltip. This makes it easier to analyze and edit risks without leaving the overview or project dashboard.

Project plan extended with ToDo columns

The project plan already allows the ratio of completed ToDos to all ToDos to be displayed for each activity. We have now extended the column selection so that the **total** number of ToDos and and the **ratio** to all ToDos can be displayed for each ToDo status. This is especially useful when activity completion is determined using ToDos. The new columns are available in both the **table view** and the **Gantt view**.



Total columns for the different ToDo statuses



Percentage distribution of the different ToDo statuses

These new columns can also be displayed in the project overview table, for example under the PROJECTS menu item.

Planned costs outside the project period

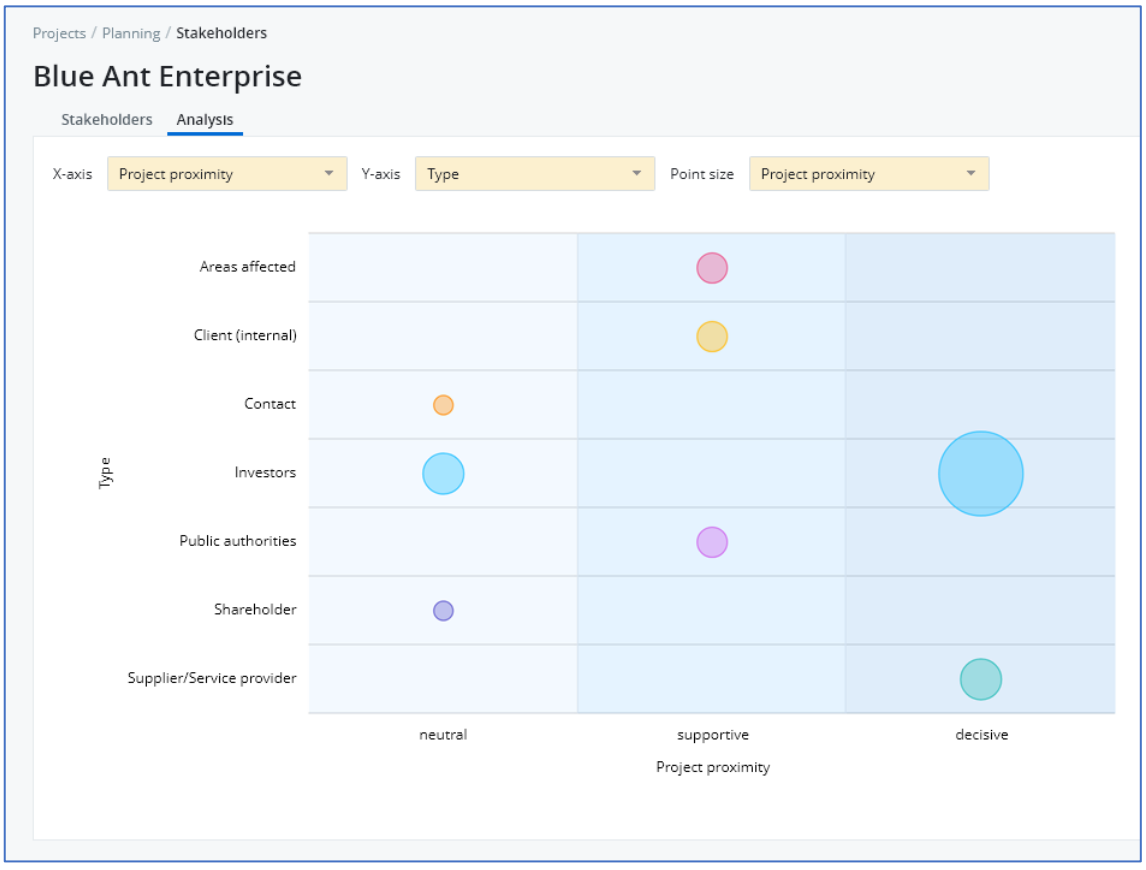
The planned date **for travel and material cost planning** can now also fall outside the activity or project period.

The new **Fix Date** option also determines whether the planned date remains unchanged when rescheduling or is automatically shifted.

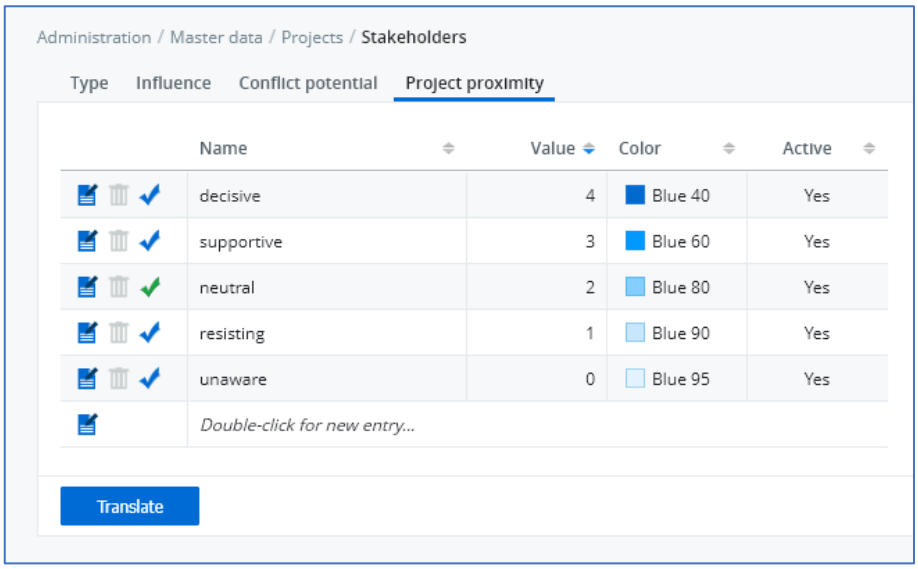
Stakeholder analysis revised

The layout of the graphical stakeholder analysis under PROJECTS / PLANNING / STAKEHOLDERS has been revised. Background colors for I**nfluence**, **Conflict potential** and **Proximity** to the project can now be configured under ADMINISTRATION / MASTER DATA / PROJECTS / STAKEHOLDERS. If no colors are set in the master data, the backgrounds remain white.

The colors of the stakeholder types continue to be used to display the individual bubbles. These colors are also shown in the table view and when editing stakeholders.



Revised stakeholder analysis display



Configuration in master data

Invoice proposal column configuration extended

In the project, the **Invoice proposals** tab on the PROJECTS / DEFAULT SETTINGS / QUOTES screen now also includes an **Invoice no**. column.

Resource overview column configuration extended

The resource overview has been expanded to include columns for the **monetary** analysis of key figures. **Reservations**, **planned** and **actual** figures can now be displayed as **cost** or **invoice** values. For each monetary key figure, three separate columns are available, each representing one of the following time periods:

- Period
- Sum of displayed periods
- Entire period

The columns can be selected in the following screens:

- PROJECTS / PLANNING / RESOURCES in the **table**
- PROJECTS / PLANNING / PROJECT PLAN in the Resources tab of the **Activity Details** pop-up
- Dashboards in the **Project resources (table)** widget

The columns are **not** available for selection immediately after the update. The administrator must grant access via the rights management system.

Sorting in Gantt project overviews

In project overviews, the sorting from the table view (e.g. by score or project status) is carried over to the **Gantt view**. This provides a graphical timeline of projects in the desired order. The following screens are affected:

- PROJECTS
- PORTFOLIO
- PORTFOLIO / PROJECTS
- PROGRAM
- PROGRAM / PROJECTS
- CONTROLLING / PROJECT LANDSCAPE

Additional column in project overviews

In the project overviews, the column configuration has been expanded to include the **Last submission status report** column.

This functionality is available on the following screens:

- PROJECTS
- PORTFOLIO / PROJECTS
- PROGRAM / PROJECTS
- CONTROLLING / PROJECT LANDSCAPE
- Dashboards

4. Miscellaneous

Open Activities chart integrated

The **Open activities** chart is now available for the following functions:

- **Open Activities** chart in project status reports
- **Open Activities** column in the project column configuration (e.g. project search)
- in the BIRT dataset **Projects** as the attribute **chart_task_burndown**

Filter adjustment under CONTROLLING / TODOS

Under CONTROLLING / TODOS, data can now be filtered by a project's **activities**.

Additional column under RESOURCES / ACTIVITIES

Under RESOURCES / ACTIVITIES, the **Total: Difference** column has been added to the column configuration. It shows the difference between planned and recorded work. All activity efforts and worktimes are taken into account, regardless of the filtered period.

Filters and columns extended in cross-project reservation screens

Data in the RESOURCES / RESERVATION and RESOURCES / RESERVATION (PM) screens can now be filtered by **portfolio** and **program**.

The information displayed under RESOURCES / RESERVATION and RESOURCES / RESERVATION (PM) has been extended to include availability for the previous period (**Previous Period – Availability**).

5. XRechnung

Extended scope and mapping

With this version, we are extending XRechnung support with **additional** fields and **flexible** field mappings. New individual fields make it possible to map invoice- and customer-specific information more precisely in the XML.

The existing **cascade logic** has also been extended for several data fields. This allows information to be maintained centrally, for example at quotation or company level, and overridden directly for an individual invoice if required.

Cost Center (BT-133)

The individual field for XRechnung has been extended to specify a cost center.

Because the library currently used cannot output the buyer's cost center via **BT-19**, **BT-133** is used instead at invoice level. The cost center entered there applies to all invoice line items.

The **cascade** is:

Invoice → Quote → Company

For the company, the indiviual field is considered first, followed by the corresponding standard field. Previously, the cost center was imported into **BT-127**; this field is no longer populated.

Invoice Type Code (BT-3)

Previously, the invoice type code was always output as **380**. The invoice type can now be defined on the invoice using a individual listbox field mapped to **BT-3**.

The following values are available:

- **326 – Partial invoice**
- **380 – Commercial invoice**
- **384 – Corrected invoice**
- **389 – Self-billing**
- **381 – Credit note**

The default remains **380**.

Buyer Reference / Leitweg ID (BT-10)

Additional levels have been added to the determination of the buyer reference or Leitweg ID. The information can thus be maintained for a specific customer or on the quote and overridden for an individual invoice when necessary.

The **cascade** is:

Invoice → Quote → Company

Contract Number (BT-12)

A new individual field mapped to **BT-12** is available for the optional contract number.

The **cascade** is:

Invoice → Quote

Object Identifier (BT-18)

A individual field mapped to **BT-18** is available for additional customer reference numbers, such as a service entry number or claim ID.

The **cascade** is:

Invoice → Quote

Preceding Invoice (BT-25)

For corrected invoices, particularly invoice type **384**, the number of the preceding invoice can be entered in a new individual field mapped to **BT-25**.

This field is maintained only on the invoice. **No cascade** applies.

Seller Identifier (BT-29)

The determination of the seller identifier has been extended to include customer-specific identifiers.

The **cascade** is:

Invoice → Quote → Organization Chart

In the organization chart, the individual field is considered first, followed by the corresponding standard field.

Buyer Identifier (BT-46)

The determination of the buyer identifier has been extended in the same way as the seller identifier.

The **cascade** is:

Invoice → Quote → Company

For the company, the individual field is considered first, followed by the corresponding standard field.

Tax Information (BT-118 to BT-121)

Additional individual fields are available in the Invoice context to represent different tax situations in greater detail. The information applies to all line items on the respective invoice.

- **BT-118** – Tax category of the breakdown as a listbox with values S, AE, Z, E, K, G, O, L and M
- **BT-119** – Tax rate of the breakdown; the tax rate continues to be maintained on the invoice
- **BT-120** – Tax exemption reason as text
- **BT-121** – Tax exemption reason as a code with values VATEX-EU-AE, VATEX-EU-IC, VATEX-EU-G, VATEX-EU-O, VATEX-EU-132, VATEX-EU-133, VATEX-EU-134, VATEX-EU-135, VATEX-EU-136 and VATEX-EU-137

This allows tax-exempt transactions and other cases requiring different tax treatment to be represented more precisely in the XML.

More Detailed Invoice Line Items

Ticket and travel expense items are now listed **separately** in XRechnung instead of being combined.

Line item numbers continue to be generated automatically in sequence and cannot be specified individually.

Template for individual XRechnung fields

A **template** containing all individual fields for XRechnung is available for download in the support section of our website.

The template makes it easier to configure the required fields and provides a central overview of the field mappings intended for XRechnung.

Benefits for You

The extended XRechnung fields provide much greater **flexibility** in meeting customer-specific and invoice-specific requirements. The additional cascade hierarchies allow **recurring** information to be maintained centrally on the quote, company or organization chart and selectively overridden at invoice level.

At the same time, the additional reference, invoice type and tax information enables more **precise** population of the XRechnung XML. This helps meet different invoice recipient requirements and **reduces** manual rework in electronic invoicing.

6. Interfaces

REST API – Search Projects by Individual Fields

This release extends the REST API endpoint /v1/projects/search so that projects can be filtered by their individual fields. Custom project information can therefore be used directly through the REST API for search and integration scenarios. External systems can locate projects using customer-specific data structures without first retrieving all project data and filtering it themselves.

The response can also be limited to the individual fields actually required. This reduces the amount of data transferred and processed, enabling faster, more efficient and more targeted Blue Ant integrations.

Filtering with customFieldsFilter

The **customFieldsFilter** is available within project search for filtering by individual fields.

A filter criterion consists of the field definition ID (**definitionId**), an operator (**operator**), and the desired comparison value or values (values).

Example:

```
{
  "customFieldsFilter": {
    "customFieldValuesFilter": [
      {
        "definitionId": 1885456909,
        "operator": "EQUALS",
        "values": [
          "Test value"
        ]
      }
    ]
  }
}
```

Available Operators

Depending on the field definition, the following operators are available as ENUM values:

- **EQUALS** – equals
- **NOT_EQUALS** – does not equal
- **IN** – matches one of the specified values
- **NOT_IN** – matches none of the specified values
- **BETWEEN** – lies between two values
- **GT** – greater than
- **GTE** – greater than or equal to
- **LT** – less than

- **LTE** – less than or equal to
- **STARTS_WITH** – starts with
- **ENDS_WITH** – ends with

Which operators are appropriate depends on the definition and data type of the individual field.

Special Considerations for Listboxes

For individual fields of the listbox type, the field definition also contains the available selection options. Each option consists of a technical **key** and the corresponding user-visible **value**.

Example field definition:

```
{
  "definitionId": 1877547018,
  "name": "Project category",
  "options": [
   {
    "key": 1854444378,
    "value": "IT"
   },
   {
    "key": 1854444380,
    "value": "Non-IT"
   }
  ]
}
```

For example, to search for projects in the **IT** project category, the desired selection must first be resolved using the field definition. The technical **key** of the listbox option is then used for the actual project search. Searching by **value** is not supported.

A corresponding filter can be structured as follows:

```
{
  "customFieldsFilter": {
   "customFieldValuesFilter": [
    {
     "definitionId": 1877547018,
     "operator": "EQUALS",
     "values": [
      1854444378
     ]
    }
   ]
  }
}
```

The requirement Project category = IT is thus represented technically by the individual field **definitionId** and the **key** of the listbox option.

To include multiple listbox values, the **IN** operator can be used, for example:

```
{
  "customFieldsFilter": {
   "customFieldValuesFilter": [
    {
     "definitionId": 1877547018,
```

```
      "operator": "IN",
      "values": [
       1854444378,
       1854444380
      ]
     }
    ]
   }
}
```

Technical IDs and keys should be obtained from the relevant field definition rather than inferred from the visible field name or selection value in the interface. Alternatively, the **ID** (primary key) and **keys** can be found in the individual field configuration interface.

Combining Multiple Individual Fields

Multiple individual fields can be passed as filter criteria within a project search using customFieldValuesFilter.

The following example combines the previously used text field and listbox in one project search:

```
{
  "customFieldsFilter": {
   "customFieldValuesFilter": [
    {
     "definitionId": 1885456909,
     "operator": "EQUALS",
     "values": [
      "Test value"
     ]
    },
    {
     "definitionId": 1877547018,
     "operator": "EQUALS",
     "values": [
      1854444378
     ]
    }
   ]
  }
}
```

In this way, multiple individual project fields can be combined in a single query and used together with the other filter criteria of /v1/projects/search.

Returning specific individual fields

Using a individual field as a filter criterion does not automatically mean its value is returned in the response.

If the value is required for further processing, individual fields can be included in the response using **includeCustomFields** and restricted to the required field definitions using **propertiesFilter**.

Example:

```
includeCustomFields = true
propertiesFilter:
```

customFields.1885456909

This returns only the required individual field instead of transferring all individual fields of the matching projects.

Filtering and data output can therefore be controlled independently.

Restriction for Memo Fields

Memo fields cannot be used as filter criteria for project searches.

This restriction applies to:

- Blue Ant internal memo fields and
- individual fields of the memo field type

Memo fields therefore cannot be searched using **customFieldsFilter** or the corresponding filtering options for Blue Ant internal fields.

This restriction only affects filtering. If the respective memo field can be returned by the endpoint, its content can still be included in the response.

REST API – Set Worktimes to Released Status

This release extends the REST API for recording and editing worktimes.

Two contexts remain available:

- **MY** context: recording and editing only your own worktimes
- **User** context: recording worktimes for employees using their **staffId**

Previously, worktimes could only be created with the **Open** status via the REST API.

- In the **MY** context, the previous behavior remains unchanged. Worktimes can still only be recorded with **Open** status.
- In the **User** context, worktimes can now also be created directly with **Released** status or changed from **Open** to **Released**.

Creating Worktimes

The following rules apply when creating worktimes:

- If no status is specified, **Open** is used automatically.
- In the **User** context, **Released** can alternatively be specified directly.
- In the **MY** context, worktimes **cannot** be created with **Released** status.
- Worktimes cannot be created directly with **Denied** or **Locked** status.

Changing Status

The following status transitions are possible in the User context:

Initial status	Target status	Allowed
Released	Open	No
Open	Released	Yes
Denied	Open	Yes
Denied	Released	Yes
Any status	Denied	No
Any status	Locked	No

Changing from **Released** back to **Open** is therefore **not** possible.

Special Considerations for Worktimes with Denied Status

Worktimes with **Denied** status can be processed again using PATCH or PUT.

The following rules apply:

- If no new status is specified, **Open** is used automatically.
- Alternatively, the worktime can be changed directly to **Released** status.

A rejected worktime can therefore either be reopened for editing or released directly.

Editing and Deleting Released Worktimes

The existing restrictions continue to apply to worktimes with Released status:

- Editing is **not** permitted
- Deletion is **not** permitted

Once released, a worktime can **no** longer be modified via the REST API.

Benefits for You

With this extension, external systems can release worktimes **directly** in the User context, automating process steps that previously required additional work in Blue Ant. Existing **safeguards** remain in place: already released or billed worktimes cannot be changed **retrospectively**, and **sensitive** statuses such as Denied or Locked cannot be set arbitrarily via the API.

Email Notification for Failed Webhook Deliveries

With this release, you can **receive** an **automatic** email notification if a webhook cannot be successfully delivered to or processed by the target system even after the configured retry attempts.

The notification uses the email settings of the respective connector. By default, the email is sent to the configured recipient after **three unsuccessful** delivery attempts. If no recipient is configured, the system administrator is notified automatically.

Notes:

- Notifications are sent in **English** by default because this is an internal system process.
- Successful creation of a webhook and successful delivery of that webhook are two **independent** processes.
- The creation of the webhook is therefore still logged as successful on the connector's **Results** tab even if subsequent delivery or processing by the target system ultimately fails.

Benefits for You

Failed webhook deliveries no longer go **unnoticed**. Administrators are notified automatically and can respond quickly to communication problems or outages in connected systems. This **improves** the operational reliability of your integrations and **reduces** the manual effort required to monitor webhook processes.