

Range of functions

11.3

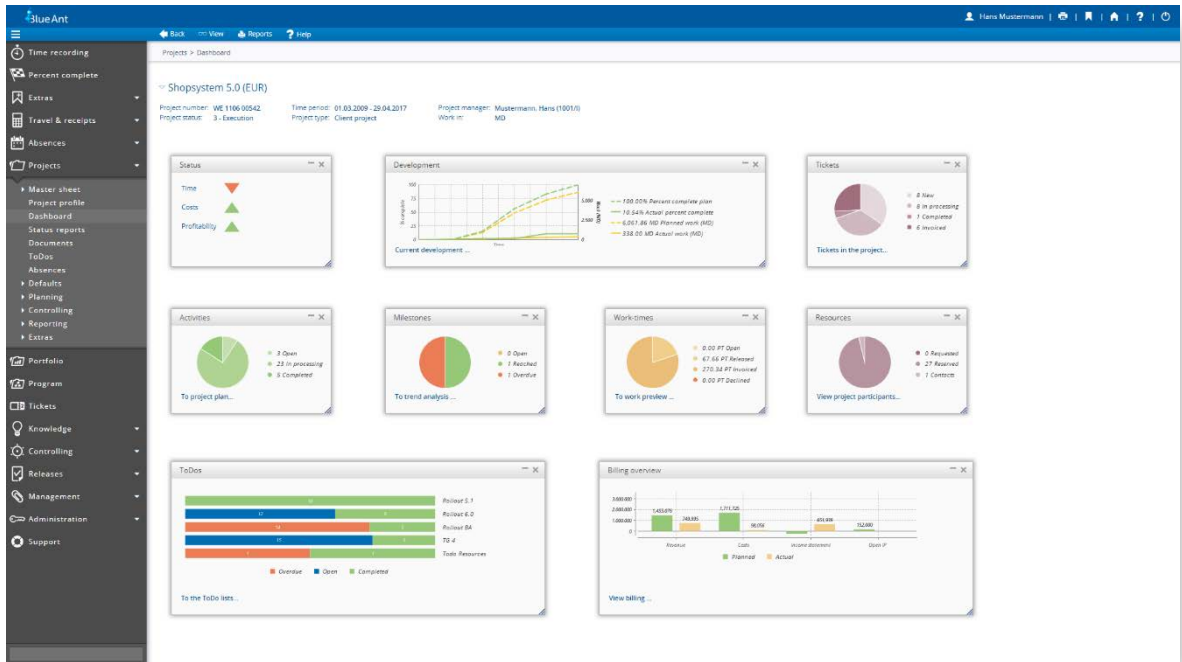


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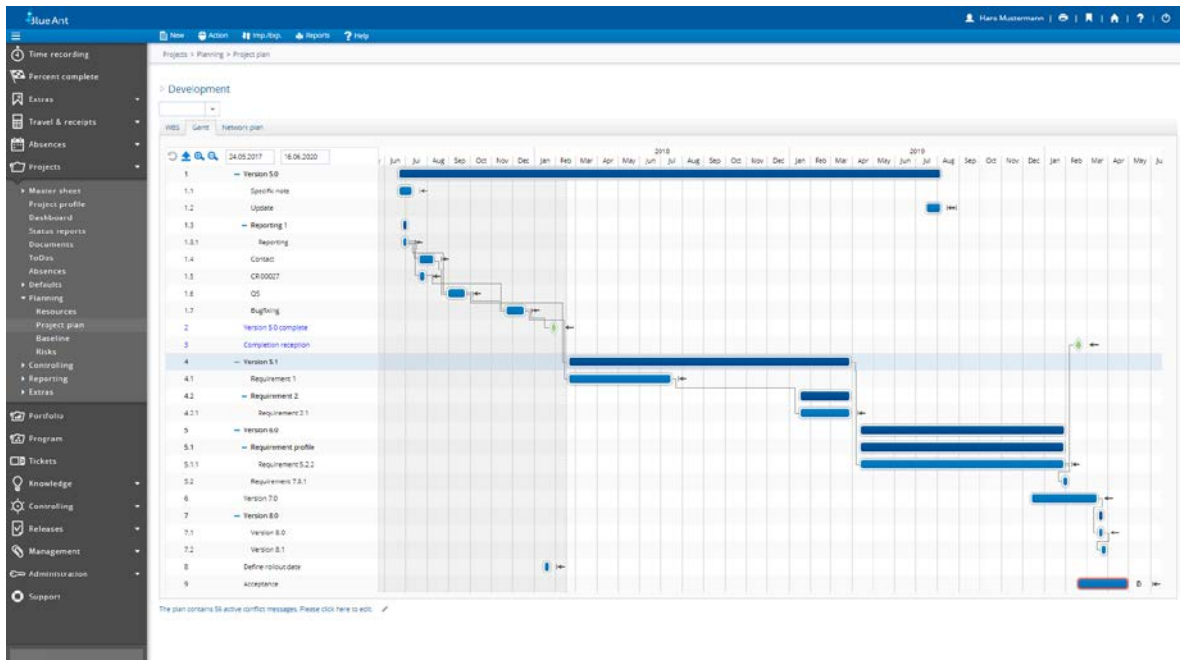
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All of the following functions are available in the Standard, Enterprise and Cloud editions. For availability, please refer to the module and interface overview on pages 29 and 30.



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.

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
- 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

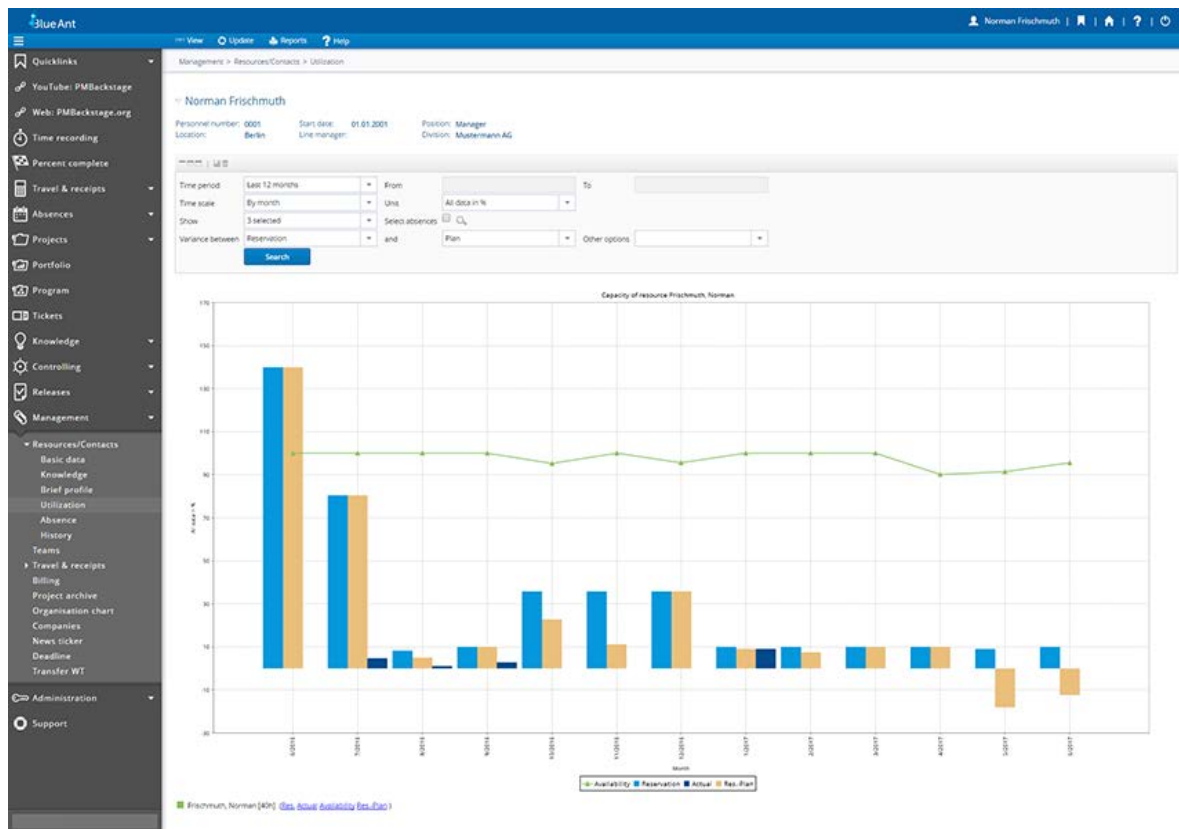
Budget and quote management

- 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 rights)
- Freely-configurable status reports including submission cycle and sending of emails
- Generation of key figures (efficiency, profitability and profit)
- Monthly plan notifications
- Evaluation of revenue based on the cost-to-cost (CTC) or earned value methods (EV)
- Dashboard control of all relevant information
- Work effort forecasts and milestone trend analyses
- Quick and simple adjustment of percent complete at project and activity level
- Performance overview using comparisons of target, plan, baseline, actual, estimated
- Tabular or graphic views of effort and remaining effort, percent complete, cost and earned value development
- Cost and budget control
- Simple and quick adjustment of the plan values to estimated work effort
- Creation of project invoices
- Archiving of projects
- Report generator

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.

Project resources

- 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

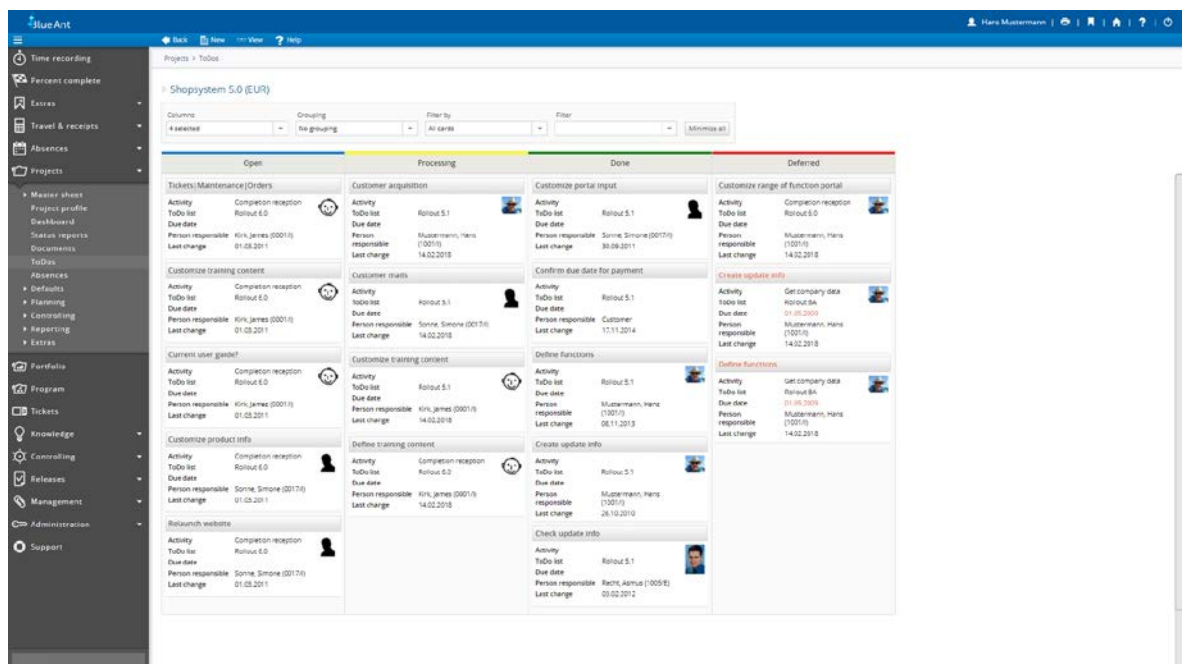
Reservation of project resources

- 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
- 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 ToDo or projects.

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)

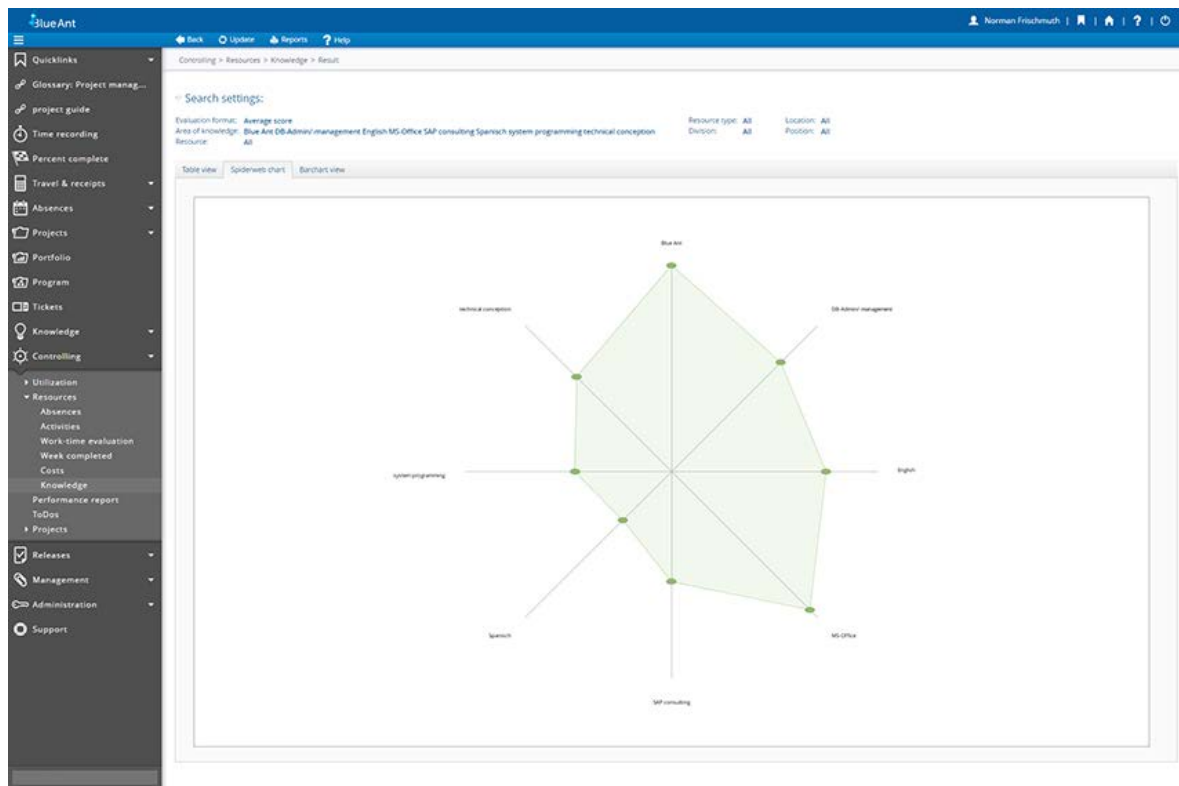
ToDo lists

- Definition of any number of ToDo lists and ToDos in the project or ticket
- Linking of ToDo lists and ToDos with activities
- 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

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.

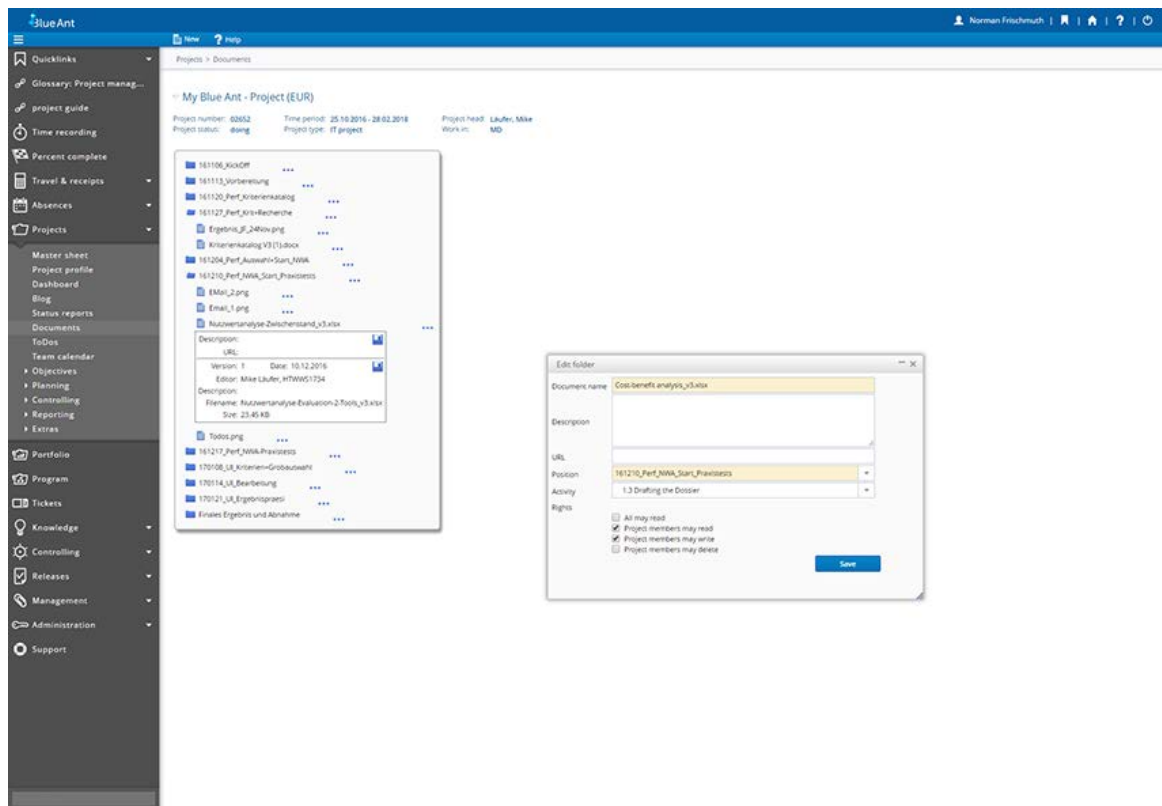
Manage knowledge

- 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. Document management



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.

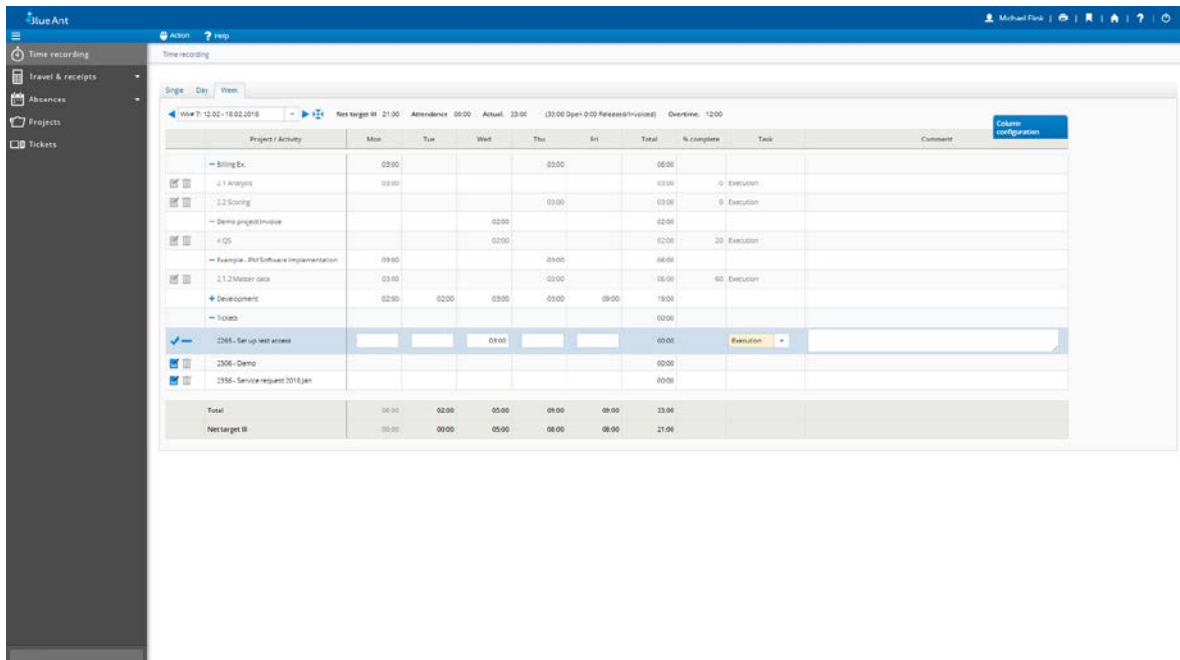
Store project documents

- 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 shows the BlueAnt Time recording interface. The main view is a weekly overview table for a project. The table has columns for days of the week (Mon, Tue, Wed, Thu, Fri, Sat, Sun), Total, % complete, Task, and Comment. The data is as follows:

Project / Activity	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total	% complete	Task	Comment
Billing Ex.	03:00				03:00			06:00			
2.1 Analysis	03:00							03:00	0	Execution	
2.2 Scoping				03:00				03:00	0	Execution	
Demo project invoice			02:00					02:00			
4 QS			02:00					02:00	20	Execution	
Example - IBM Software Implementation	09:00			05:00				14:00			
2.1.2 Master data	03:00			03:00				06:00	60	Execution	
Development	02:00	02:00	03:00	03:00	09:00			19:00			
Tickets								00:00			
2365 - Set up web servers				03:00				03:00		Execution	
2366 - Demo								00:00			
2368 - Service request 2018 jan								00:00			
Total	08:00	02:00	05:00	08:00	09:00			32:00			
Net target III	00:00	00:00	05:00	08:00	08:00			21:00			

Ascertaining actual work performed in a project is essential for effective project management. Blue Ant supports the user with simple and flexible recording options.

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

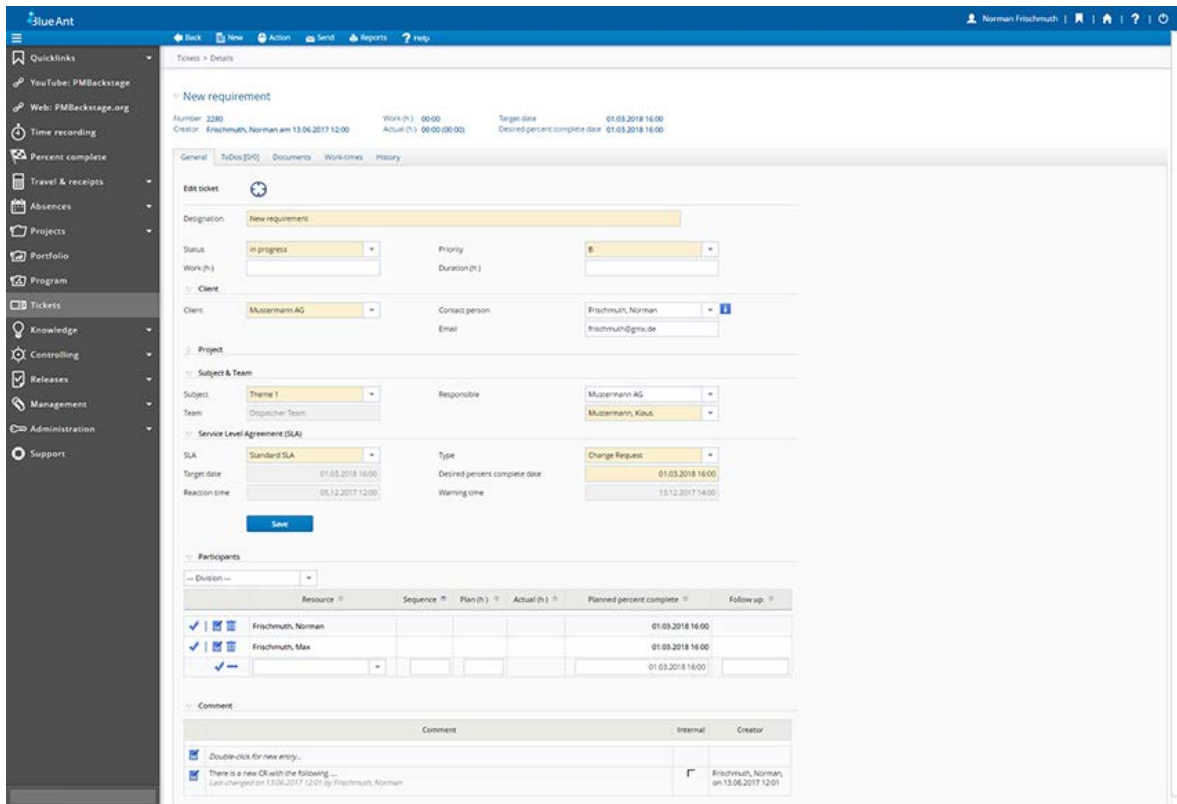
- Time recording with calendar function and weekly overview
- Individual time recording incl. start and end time as well as break or duration
- Configuration of the recording type for each resource
- Recording of estimated overtime or remaining work
- Completion reporting of weekly work-times
- Completeness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



The screenshot displays the BlueAnt web interface for managing tickets. The main content area shows a 'New requirement' ticket form with the following details:

- Number:** 2280
- Creator:** Frischmuth, Norman am 13.06.2017 12:00
- Work (h):** 00:00
- Actual (h):** 00:00 (00:00)
- Target date:** 01.03.2018 16:00
- Desired percent complete date:** 01.03.2018 16:00

The form includes sections for:

- General:** Edit ticket, Designation (New requirement), Status (in progress), Priority (B), Work (h), Duration (h).
- Client:** Client (Mustermann AG), Contact person (Frischmuth, Norman), Email (frischmuth@gru.de).
- Project:** Subject & Team (Theme 1, Dispatcher Team), Responsible (Mustermann AG, Mustermann, Klaus).
- Service Level Agreement (SLA):** SLA (Standard SLA), Type (Change Request), Target date (01.03.2018 16:00), Desired percent complete date (01.03.2018 16:00), Reaction time (05.12.2017 12:00), Warning time (13.12.2017 14:00).
- Participants:** A table listing resources and their planned completion dates.
- Comment:** A section for adding comments, including a note: 'There is a new CR with the following ... Last changed on 13.06.2017 12:01 by Frischmuth, Norman'.

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.

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

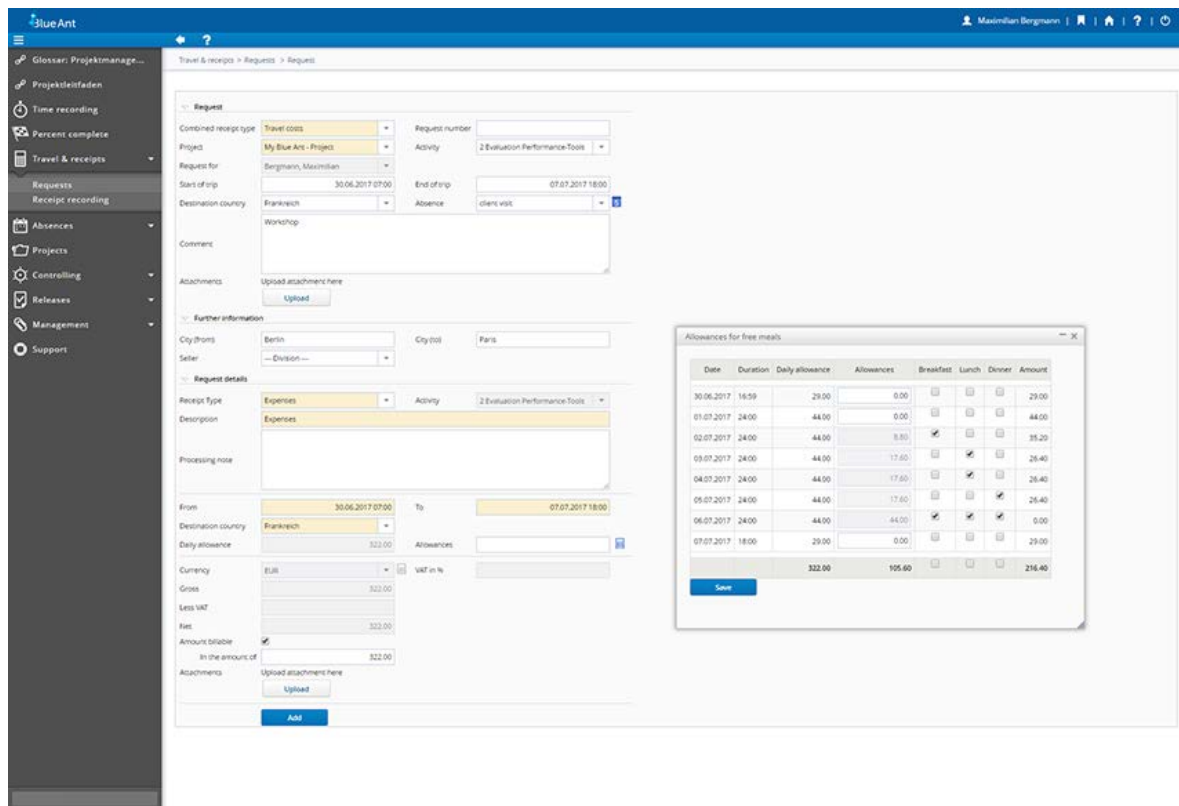
Service level agreements

- 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. Receipt/Travel costs planning and recording



Date	Duration	Daily allowance	Allowances	Breakfast	Lunch	Dinner	Amount
30.06.2017	16:59	29.00	0.00				29.00
01.07.2017	24:00	44.00	0.00				44.00
02.07.2017	24:00	44.00	8.80	<input checked="" type="checkbox"/>			35.20
03.07.2017	24:00	44.00	17.60	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		26.40
04.07.2017	24:00	44.00	17.60	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		26.40
05.07.2017	24:00	44.00	17.60	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		26.40
06.07.2017	24:00	44.00	44.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.00
07.07.2017	18:00	29.00	0.00				29.00
		322.00	105.60				216.40

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.

Receipt request and recording

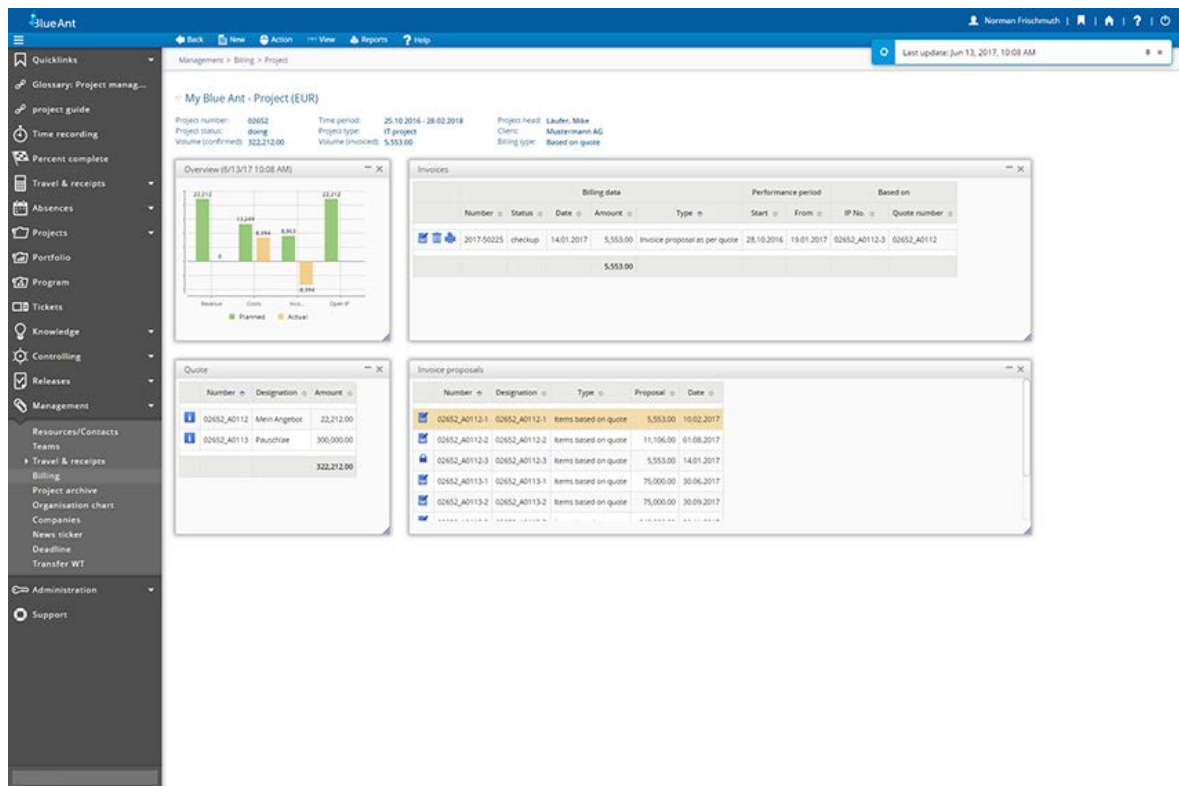
- Create requests for receipts, costs (e.g. business trips) and investments
- Quick and simple recording of receipt and travel costs by resources
- Document storage for each combined or individual receipt
- Transfer of requests to combined and individual receipts
- Transfer of a combined receipt (travel 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
- Country-specific expenses, mileage allowances, VAT amounts and benefits in kind such as breakfast, lunch and dinner, and their historicisation

- 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.

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

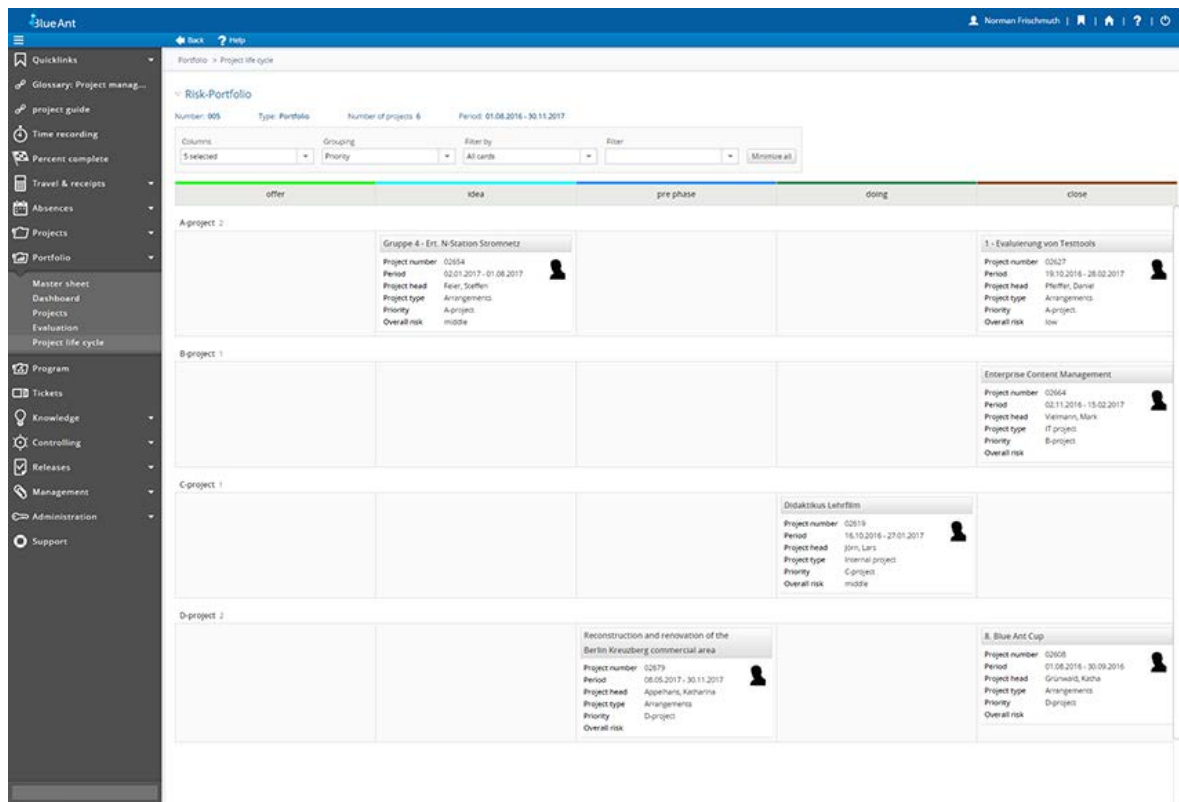
Preparation of activity confirmations and invoices

- Printable display of work-times
- Optional display of all non-billable work
- Fixed or automatic project billing
- Partial billing of tickets

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 management



Portfolios cluster projects for controlling and also serve multi-project management. Project environments can be visualized and evaluated better as a result.

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

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

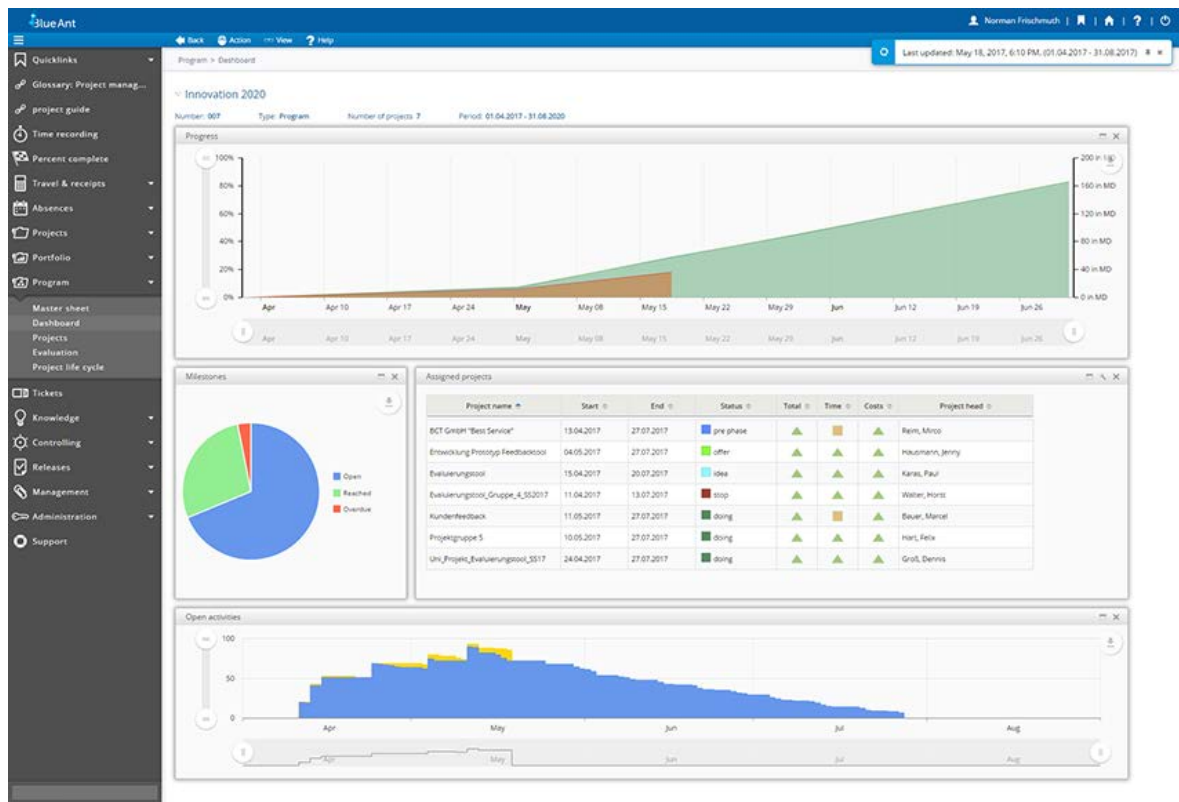
Visualisation of project portfolios

- 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 program management



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.

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

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

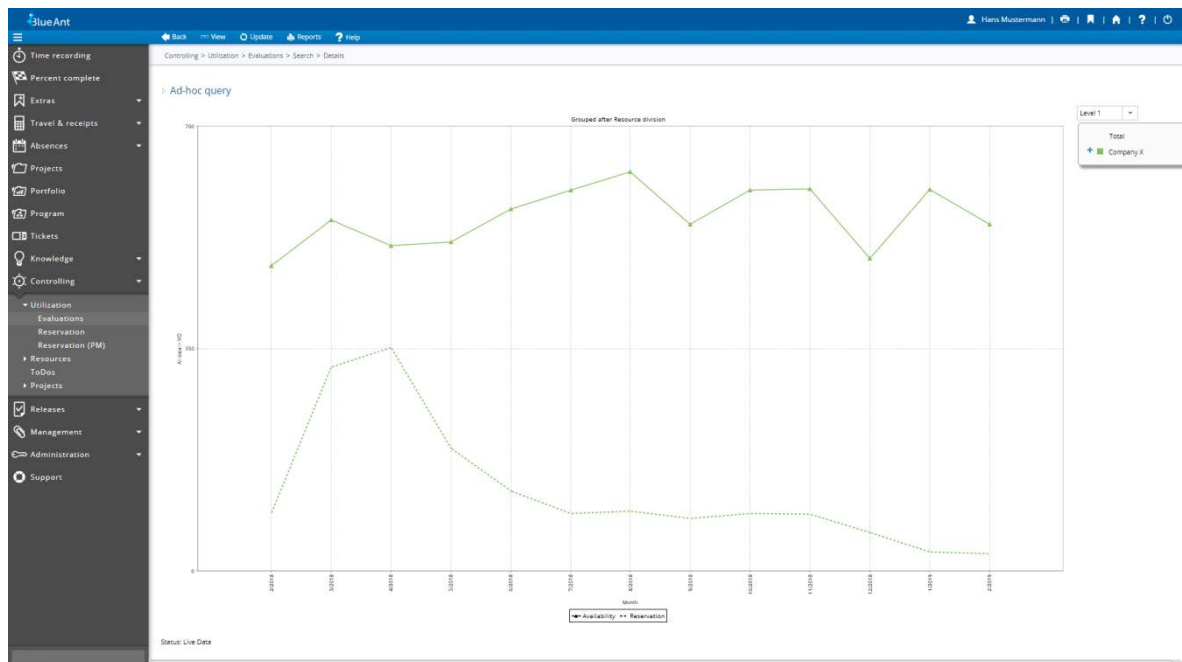
Visualisation of project programs

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- Individual reports with BIRT

Display in project program 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 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.

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
- Monthly performance reports for departments with individual approval processes and their controlling
- 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

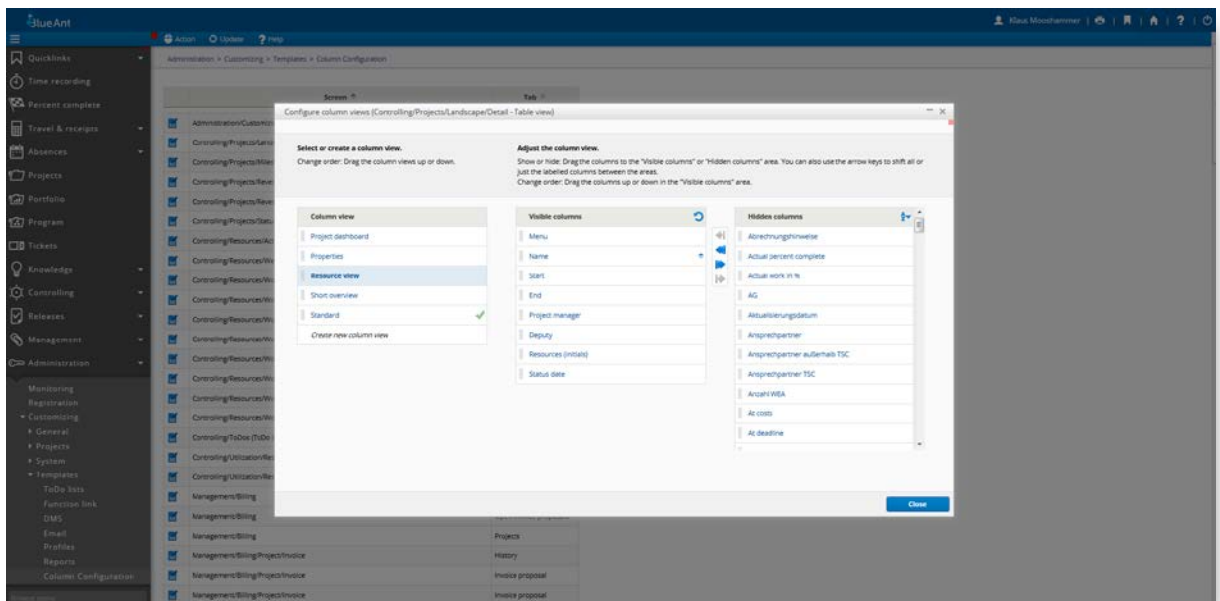
Project resource utilization

- 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
- 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.

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)
- 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

Customizing

- Individual fields, including calculation, screens and sections/tabs with control of visibility throughout the whole system
- Linking of free fields with other systems by URL-call
- Customer-specific reports with BIRT report generator
- 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)

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. Blue Ant Apps/Plugins




For Android & iPhone

- Work-time recording on available projects and tickets
- Percent complete recording
- Overview of all recorded work-times of the account used




For JIRA and MS Project

- Recording of work-time and percent complete in JIRA on projects and activities in Blue Ant
- Creation of Blue Ant activities by JIRA issues and their synchronization
- Import/export of project plans with MS project

15. Interfaces

	 Standard Edition	 Enterprise Edition	 Cloud Edition
AVAILABLE INTERFACES			
Plugins for JIRA and 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)	●	●	●
Import/Export of work-times/receipts (SAP, Navision, Sage, DATEV, MS Excel)	●	●	●
MS-Exchange Server 2007 SPI/2010/Office 365	optional	●	optional
LDAP/ ActiveDirectory connection <ul style="list-style-type: none"> Resource data and company divisions User groups and user authentication 	●	●	●
SSO access via windows domain with NTLM2	optional	●	
SSO access via SAML 2.0 with AD FS	optional	●	optional
Connectors for relational databases, MS Excel and CSV files for: <ul style="list-style-type: none"> Import/Export of: Absences, Individual risks, Invoices, Plan and actual costs, Projects, Resource data, Work-times (resources) Import of: Budget targets, Clock in & out, Company divisions, Organisation chart, ToDo lists incl. ToDos, Users and user groups, Work-times (team resources) 	●	●	●
Web services for access to third-party systems (SAP, Navision, Sage, DATEV)	optional	●	●
External links to Blue Ant functions	●	●	●
Integration option for blogs, wikis, forums and other web applications	●	●	●

16. Blue Ant Module/Functions

BLUE ANT FUNCTIONS	 Standard Edition	 Enterprise Edition	 Cloud Edition
Blue Ant			
Basic	●	●	●
Additional Portfolio and Program Management Module	optional	●	optional
Additional Ticket System Module	optional	●	optional
Master data management and Customizing			
Rights management	●	●	●
Multi-lingual capability	●	●	●
Interfaces			
Jira und MS Project	●	●	●
LDAP/ActiveDirectory	●	●	●
Web services	optional	●	●
SSO	optional	●	
MS Exchange / Office 365	optional	●	optional
Connectors	●	●	●
Individual adjustment	optional	optional	
Piloting of the solution	optional	optional	optional
Purchase / Leasing	●	●	