

# Blue Ant: Realistic portfolio planning without resource bottlenecks



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Coordinating many projects running in parallel is a demanding task, and includes not only scheduling suitable staff and taking their availability into account, but also strategically selecting the right projects for implementation. This is only possible if the necessary overview of what is happening in the projects is maintained. This is exactly what Blue Ant is for. The software provides a clear view of the project portfolio with interactive dashboards, supports project application processes and provides functions to realistically plan project resources. Blue Ant is not just aimed at multi-project management, but also includes many useful functions for project managers and team members. Project work is possible with classic scheduling as well as with agile approaches. The software is rounded off by functions such as travel expenses management and the billing of project services.

## New dashboards for clear information

The user interface has been graphically revised for the current version 14. It is now brighter, offers more contrast and has a more reduced, quite minimalist look. The data entry fields are also more clearly structured than in the previous version.

The different sections in the dashboards, called widgets, now offer functions that were previously only available in the full views. The dashboards not only display data, but you can also work directly in them. For example, if you add a list of your ToDos to your personal dashboard, you can filter and sort them there and, if necessary, open individual ToDos for editing.

The data to be displayed on the dashboards is defined once centrally. Project participants can then adapt these specifications individually as required.

The new user interface also has a responsive design, which means that it adapts to the space available on the device used. So, Blue Ant can be used equally well on a desktop PC, tablet or smartphone, although smaller devices are probably more suitable for time recording or looking at upcoming tasks than for scheduling or portfolio management.

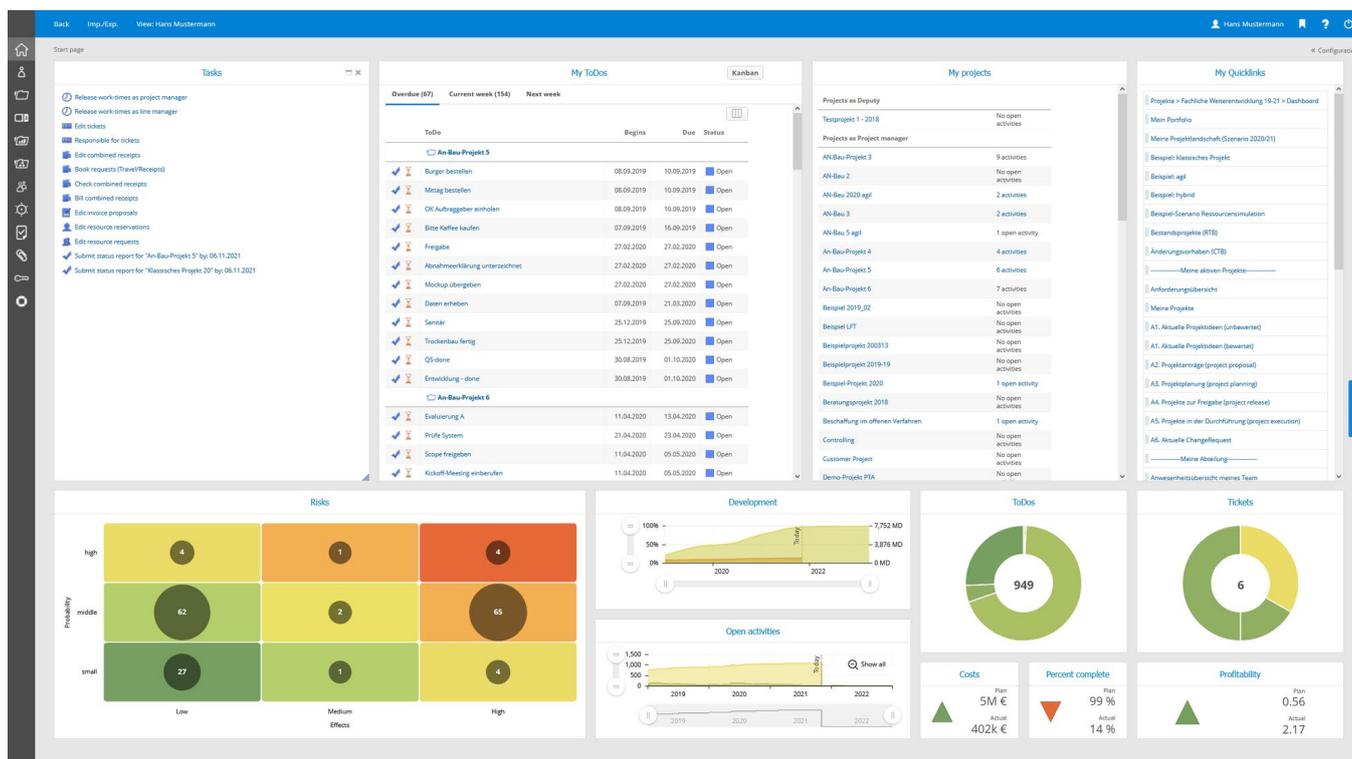


Fig. 1: Dashboards provide an overview and help with navigation

Blue Ant displays the project data graphically in the dashboards (Figure 1). If you want to see more information, pause for a moment with the mouse over a graphic. Details then appear in a pop-up window. Once defined, dashboards function on different structural levels. For example, if you access a financial dashboard for an entire program, it displays the total values of the program, while for an individual project of the program it only takes the sums generated there into account.

Using dashboards, it is easy to create a portal that provides all project participants with the information they need about individual projects or the entire project landscape, depending on their role. Team members, for example, receive an overview of their personal project tasks and their own time feedback. For portfolio management, there may be overviews of current projects, information on pending project proposals and evaluations of finances, risks and opportunities of the overall portfolio.

To navigate through the program, Blue Ant provides a menu on the left-hand side of the window that divides the various views of the software into different areas: "Projects", "Program" and "Portfolio" follow the project structure, while "Resources" and "Controlling" support specific organisational roles. The dashboards can also be used for quick navigation, because from them you can jump directly to the corresponding projects and activities.

## Informed portfolio decisions

In Blue Ant, portfolios first of all have the function of useful brackets within which related projects can be grouped and then quickly evaluated at any time. The portfolio module also serves to manage the changes between the project phases. Whether a project, for example, is allowed to change to implementation after the planning phase or is considered to be completely finished at the end, is regulated in the portfolio management workspace, which is therefore an important module for the Project Management Office (PMO). For the portfolio overview, Blue Ant uses a kind of Kanban board on which all the projects in the portfolio are arranged in columns according to their current project phase from idea to completion (Figure 2). This way, it is always clear which projects are currently pending and how far they have progressed.

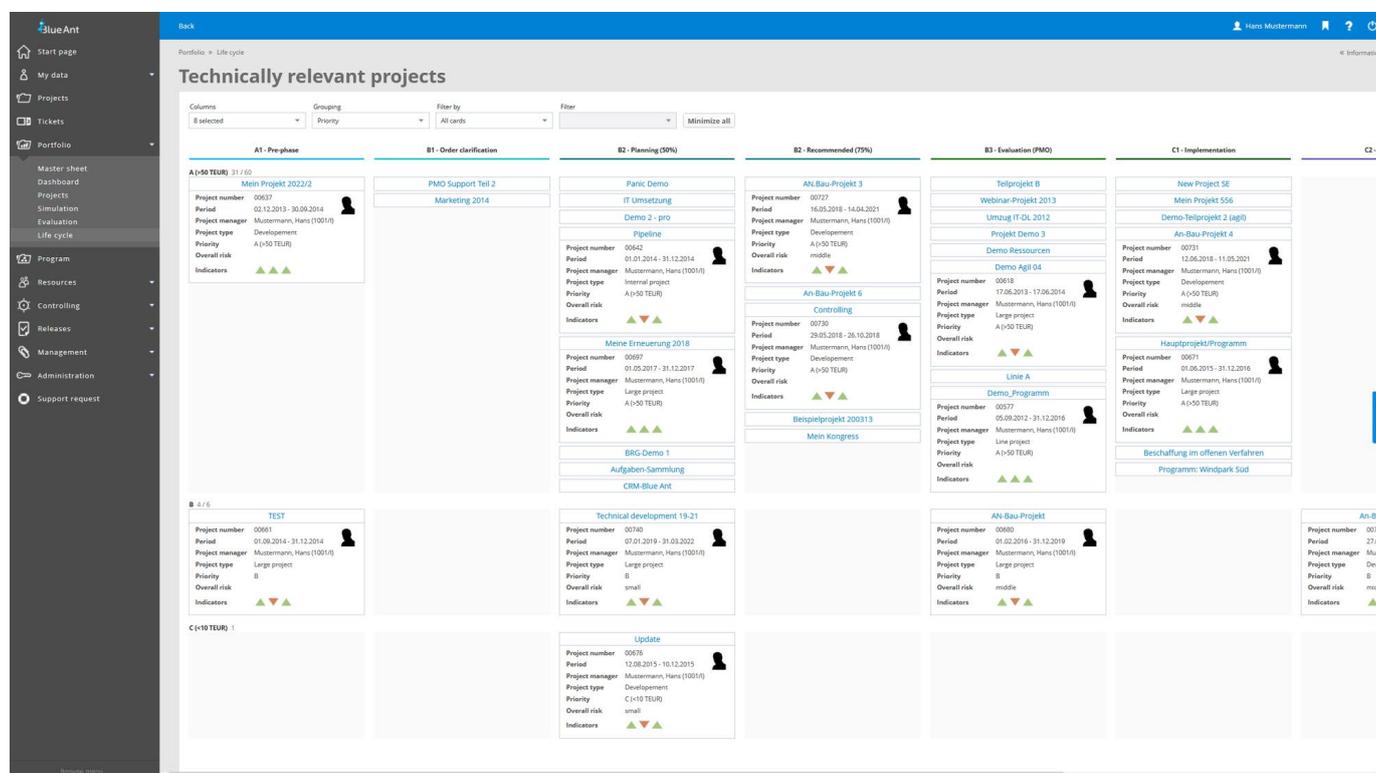


Fig. 2: The portfolio overview shows the status of all included projects at a glance

In early project phases, rough planning is often sufficient to assess the basic prospects of project success and possibly to prepare a more detailed project proposal. For this purpose, Blue Ant provides not only the general project planning functions, but also risk analyses and evaluation models for project efficacy. In the case of customer projects, effort and return can also be compared. Together with further information on the project, such as a short text on the justification for the project and its aims, Blue Ant can collect all the necessary information for a project proposal. The only thing left to decide as to whether interesting project ideas should actually be realised is to look at the available resources.

## Powerful resource management

For resource planning, the staffing requirements of the project are first estimated and discussed with the respective line managers. The requirements identified in the project planning can also be sent via the workflow as a request to the managers, who analyse the workload of their team in the software and reserve suitable team members for the project. Project management can then schedule the new team members for specific tasks. This reservation of project resources allows binding resource planning without line managers having to concern themselves with all the details of project planning. Agreements reached in meetings can also be well documented for everyone.

In the current version 14, Blue Ant also enables bottom-up planning, in which resources are planned directly for individual project tasks. Suitable team members can be found on the basis of skills and roles with the help of powerful search functions. The total resource requirements of the project are then calculated from all tasks and negotiated as a reservation with the specialist departments.

Even long-term personnel planning is possible with Blue Ant. This is done by defining the desired profiles for particular project roles and comparing them with the existing skills of the team members. Together with forward-looking portfolio planning, the departments can therefore recognise future bottlenecks and take countermeasures through further training, for example. Thanks to resource reservation, sound, realistic decisions about future projects in the portfolio are possible.

### For project service providers: from quotation to invoicing

It is no coincidence that Blue Ant's functional focus is on resource management. The software is traditionally strongly rooted in the area of personnel-intensive service projects. It can create complete quotations from project plans and invoice work performed on the project. Blue Ant is based, for example, on the actual times recorded. From this, the program determines automatic invoice proposals by taking the roles of the team members as well as customer- or project-specific billing rates into account.

The built-in expense report, which can even be used to map the approval processes for business trips, also allows the project team to record the incidental costs of the projects. These can then also be invoiced to clients. For project-oriented service providers, the software is a complete solution for the project business.

## New portfolio simulation for resources and budget

The question of whether all that is desirable is feasible often leads to intensive discussions about project ideas and possible implementation periods. In this situation, Blue Ant's new scenario function clarifies the effects of decisions on the resource situation and the financial framework. It determines the resource requirements of the current and possible future projects arising from project ideas in relation to portfolios, programs or entire project landscapes. It also takes holidays and basic workloads into account, for example for internal departmental activities.

The scenarios presented by the future simulation can be adapted by selecting projects for implementation, postponing them or changing their order of priority. If a spontaneous project idea has not been submitted yet, it can simply be included directly in the scenario on an ad-hoc basis.

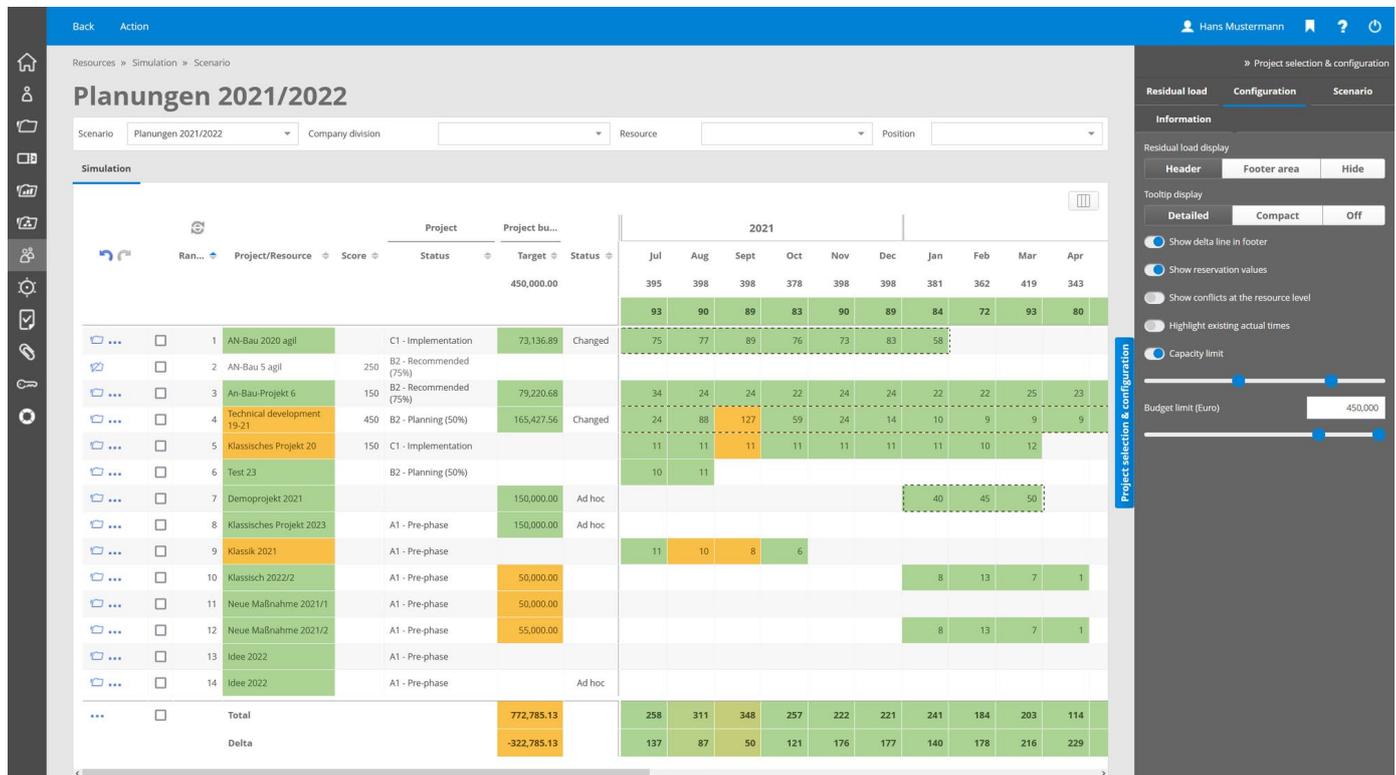


Fig 3: Project scenarios show what is feasible in terms of staff and finances

For each change, Blue Ant calculates the effects and colour-codes the fields of the scenario overview in colour levels between green and red depending on the feasibility (Figure 3). In the process, the software not only checks the availability of resources, but also the required financial means compared to the available budget. If there are problems in detail, e.g. because the resources of a department are sufficient overall, but scheduling conflicts are foreseeable with individual persons, this is signalled by discreet triangles in the upper left corner of the cells concerned. If you wish, you can limit the evaluations to individual organisational units, employees or roles and concentrate on bottleneck resources, for example.

Blue Ant makes it possible to create as many scenarios as required. Once they have been developed, they are compared with each other in order to find the optimal project combination. What is planned in the scenarios has no effect on the project proposals or even on ongoing projects. So, you can experiment freely without upsetting other users.

When you opt for one of the scenarios, however, the assumptions made in it must first be transferred into the actual planning. Blue Ant can do this automatically and, for example, label project proposals as approved or set new deadlines according to the scenario simulation. In practice, however, this rarely

works fully automatically. For this reason, Blue Ant summarises possible conflicts in a transfer protocol. There are warnings if, for example, the changed resource requirements of postponed projects no longer match the reservations or if actual times have already been booked. This makes it easier to subsequently coordinate the details with the project managers concerned and thus to convert the assumptions of the simulation into realistic project planning.

## Agile or classic? Why not hybrid?

Scheduling in the bar chart can be operated interactively. Right-clicking on a bar, for example, makes it possible to edit tasks and dependencies and add resources. If you wish, you can also simply move task dates with the mouse. Blue Ant is by no means limited to classic project planning, however, but also supports agile and hybrid approaches. The software does not offer a pure implementation of Scrum; instead, it provides functions that simply allow for more "relaxed" planning. The key tools for this are the Todos, which Blue Ant displays either as a list or on the Kanban board. For smaller projects, it is sufficient to use just one such board to coordinate all project activities over the entire project (Figure 4). This way, planning remains simple and the project is still recorded in the software and visible on the PMO's radar.

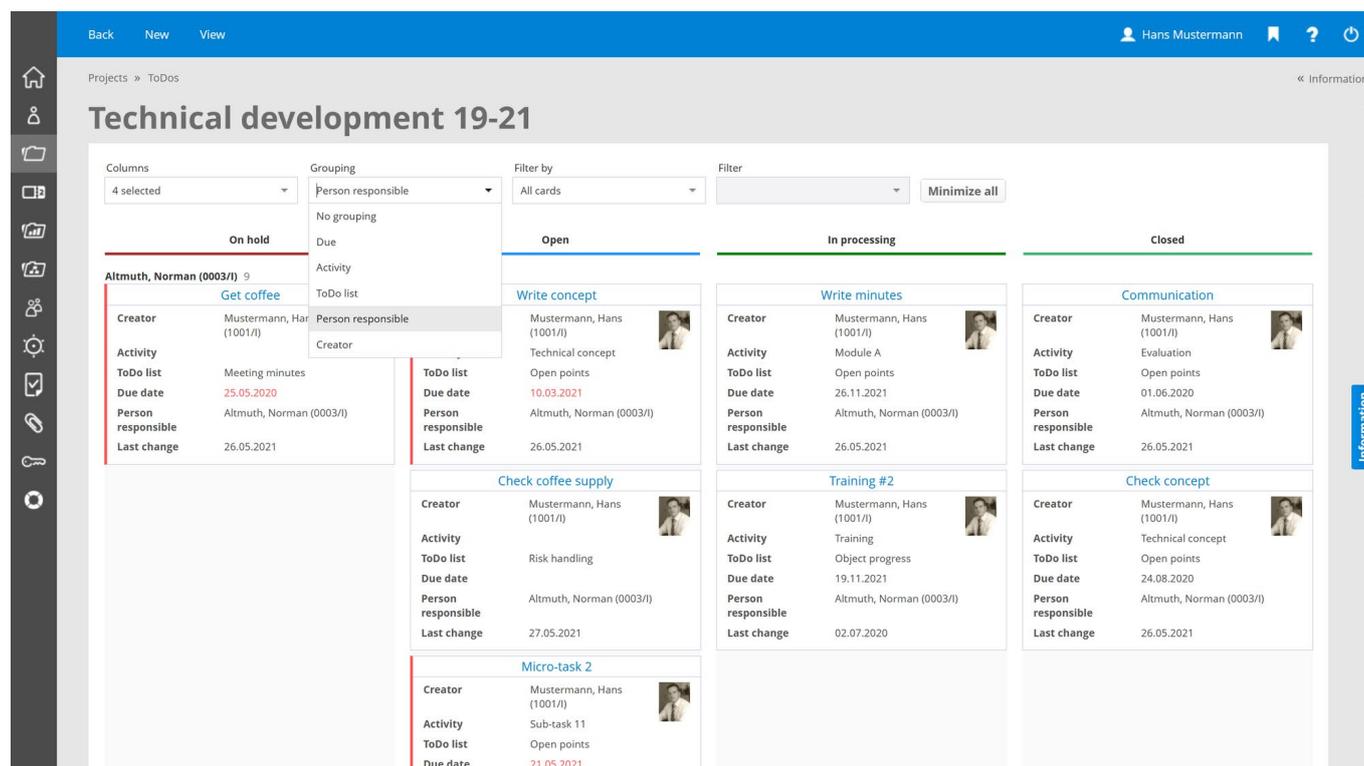


Fig. 4: Overview of the Todos in a project

In large projects, filters and groupings ensure that the Kanban board remains clear even with a large number of Todos. In addition, Todos can be assigned to a specific activity in the schedule. Blue Ant then shows a separate Kanban board for each activity, which only includes the associated Todos. In

this way, even larger projects can be implemented using hybrid or agile methods. In hybrid projects, the schedule is kept lean with a few, relatively extensive work packages. The respective team organises the detailed tasks for each work package with ToDos and processes them with the Kanban board. In agile projects, such as those based on Scrum, only sprints of the same length are planned in the schedule and the ToDos are used to describe the individual stories, for example. So, the activity Kanban board becomes a sprint board.

If you don't need a schedule for your project because you only want to work with sprints, for example, you can simply choose periodic planning. The required resources for each time period are simply entered in a table (Figure 5). In this way, the team members for the sprint teams are booked for fixed periods and thus ensure that the required team members for all projects are considered in resource planning, regardless of whether agile, hybrid or classic planning is used.

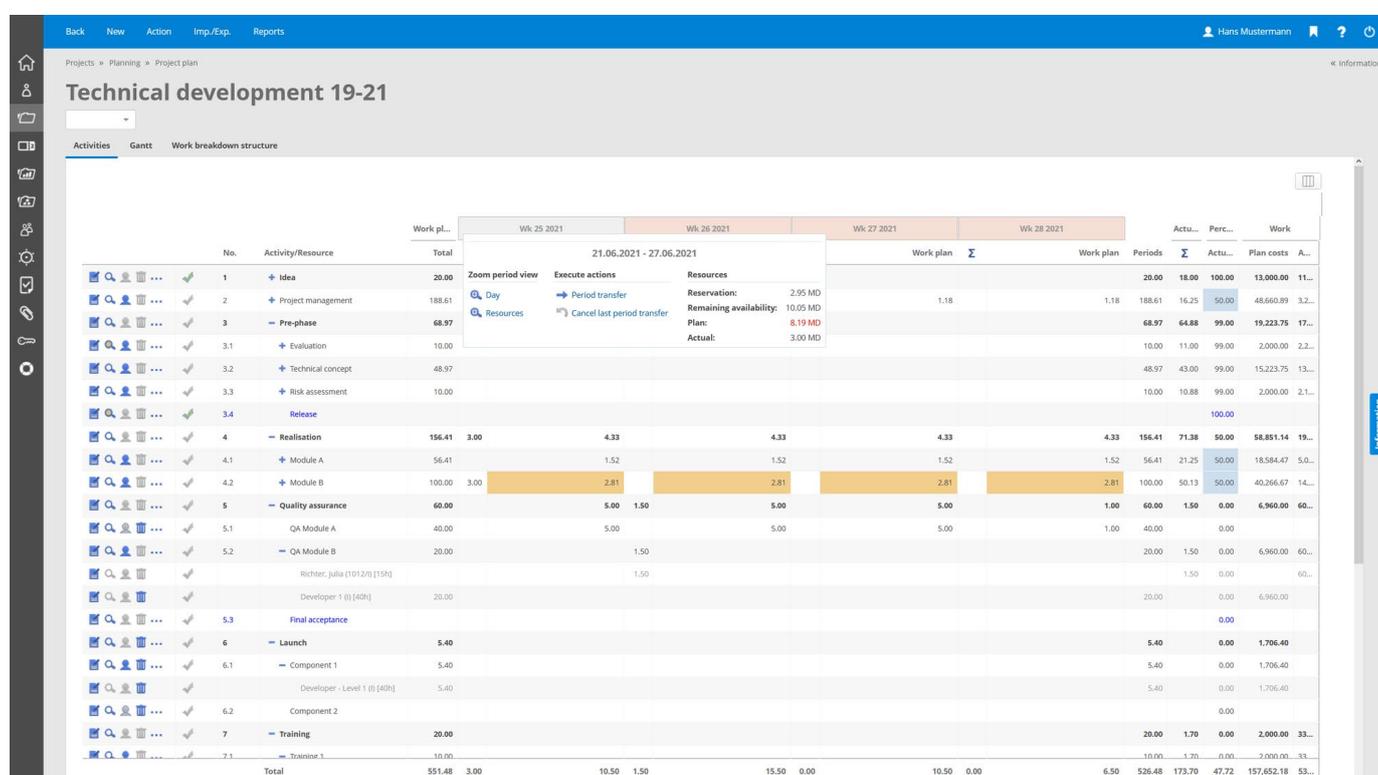


Fig. 5: For agile projects, planning is done periodically (here, for example, by calendar weeks)

With these functions, project management can flexibly choose its methodology as a hybrid form somewhere between classic scheduling and agile project management. Irrespective of this, the extensive functions of the software for company-wide resource management and the evaluations for financial controlling of the projects are always available.

## System requirements and licences

As web-based software, Blue Ant runs on all operating systems for which common browsers such as Edge, Firefox, Chrome, Internet Explorer or Safari are available. The software is provided as a cloud solution, but can also be installed on the company's own server.

Interfaces to central LDAP servers enable users to log in without entering a password using the Windows login. With Blue Ant's configurable connectors, individual interfaces to other systems can be configured without programming. In this way, for example, the ERP system for actual costs can be integrated or a web-based customer management (CRM) can be supplied with current information on customer projects.

Blue Ant is available in three editions: Standard, Enterprise and Cloud. The Standard Edition is the entry level for small and medium-sized enterprises with 50-200 users. It contains the basic functional scope and has rights management as well as administrative access to customising. The additional modules "Portfolio management", "Program management", the "Ticket system" and interfaces (connectors and web services) can be added as options. An upgrade to a higher Blue Ant Edition is possible at any time. For 100 licences with one additional module each, the cost per licence is 350 euros.

The Enterprise Edition offers medium-sized companies and corporate departments with up to 1500 users a professional multi-project management platform with integrated resource management. It contains the full range of functions of all Blue Ant modules as well as administrative access to customising. With open interfaces (web services and connectors) and single sign-on functionalities, integration into the existing IT landscape is possible. Configurable release and approval workflows ensure technical integration into corresponding management processes. In addition, the Blue Ant modules can be adapted to individual needs and supplemented with customer-specific modules. With 100 licences, the cost per licence is 455 euros.

The Cloud Edition is a rental solution for companies that want to use Blue Ant without their own hardware infrastructure and the necessary technical administration. The functions of the standard edition and all open interfaces (web services) are available. The additional modules "Portfolio management", "Program management" and "Ticket system" can be added on an optional basis. For 100 licences in an annual contract including one additional module, the monthly costs are 10 euros per licence.

## Conclusion

With the refreshed dashboards of the new version, Blue Ant manages to bring an even better overview into the project portfolio. The lists and graphics of the dashboards are flexible and customisable. PMOs who not only want to obtain information on the current status of projects and project proposals themselves can also provide other stakeholders with customised live updates on the project landscape.

Blue Ant is also well positioned in operational project management. Whether agile, hybrid or classic - there are suitable functions for every project profile. In addition, there is a powerful resource management system that provides clarity at all times for both the project management and the resource managers in the departments. Blue Ant clearly shows whether projects are really feasible. The software provides all the functions needed to compile realistic portfolios that can be implemented with the existing teams, or to identify resource bottlenecks that are likely to recur in the medium to long term and take countermeasures promptly. Combined with the financial functions, which even cover project proposals and the billing of project services, a complete picture of the project portfolio is created, regardless of whether the individual projects are managed with an agile, classic or hybrid approach.

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