

# Blue Ant

## Update Information 24.0



Dear Users,

In this document you will find an overview of new functions and functional enhancements that are available to you with Blue Ant version **24.0**. The most important new features are:

- Configurable filters (page 4)
- New dashboard for line managers and resource managers (page 9)
- New **Utilization** widget for team leaders and controllers (page 10)
- Copy ToDos and ToDo lists (page 13)
- Feedback function for cloud customers (page 6)

**Please note: Support for the following modules ends with this version:**

- Exchange Synchronizer
- Service assignments
- Reservation plans

If you have any questions or suggestions, please let us know via the Blue Ant support page (at [blueant.de](https://blueant.de)).

Wishing you success in your project work with Blue Ant

Your Blue Ant Team

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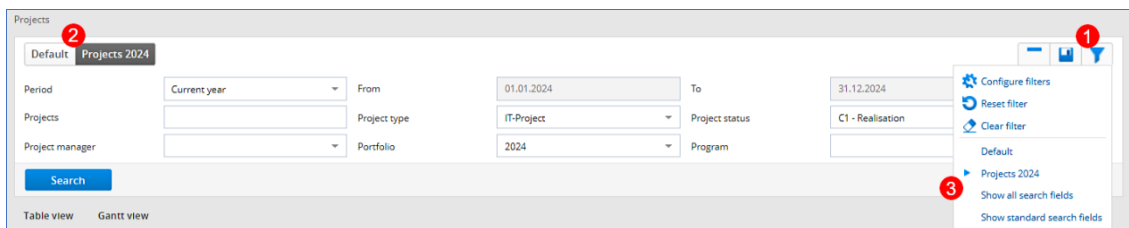
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# 1. Basic system

## Configurable filters

With this version, we are introducing a new function for **configuring search filters**. The entire function is very similar to the column configuration and offers you another way to adapt Blue Ant to your needs. You can customize both the **scope** and the **arrangement** of the fields in one search screen. Different configurations (3) can be saved in multiple filters.

You can switch between the various filters using the menu (1) and shortcuts (2). You can also make further settings for each filter.

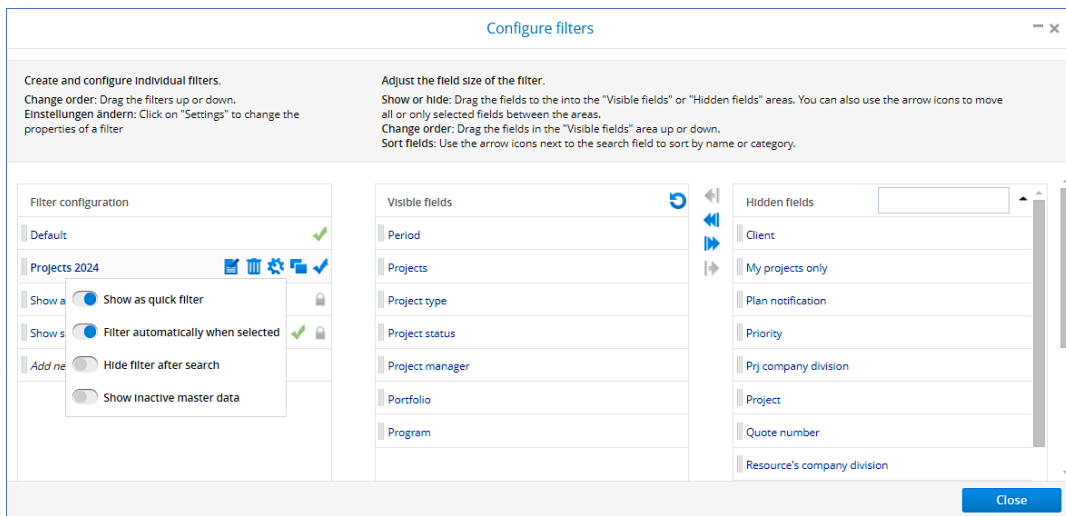


### *Configurable filters in the project search*

#### Range of functions

The following options are available when **configuring** filters:

- Individual **name**
- Selection of the **field scope**, including the **individual fields** of the respective search screen
- Define the **order** of the fields
- **Copy**
- **Delete**
- Determine the **default** that is displayed when the screen is accessed
- Display in the **shortcuts**
- **Automatic search** on selection
- **Automatic minimisation** after the search
- Display **inactive master data**



### Settings in the filter configuration

- 💡 The configurable filters are already available on the most important search screens in the current version. Please let us know if you would like to change the filters on other screens as well. As a cloud customer, you can use the new Feedback function for cloud customers to do this.

### Free text search for projects

For a more flexible search for projects, we provide you with a field for free text searches. You can search by project name and project number.

When entering these, you have access to the following additional search options:

- aA Case sensitive
- W Search for whole word only
- .\* Perform pattern matching with regular expression



### Free text search in the search filter

- 💡 The field is also available in the project filter for widgets.

## Administration of templates

You can create public filter configurations under ADMINISTRATION / CUSTOMIZING / TEMPLATES / COLUMNS AND FILTERS. We provide you with the **Show default search fields** and **Show all search fields** templates for each search template. These are created automatically during the update and cannot be deleted.

## Update and rights

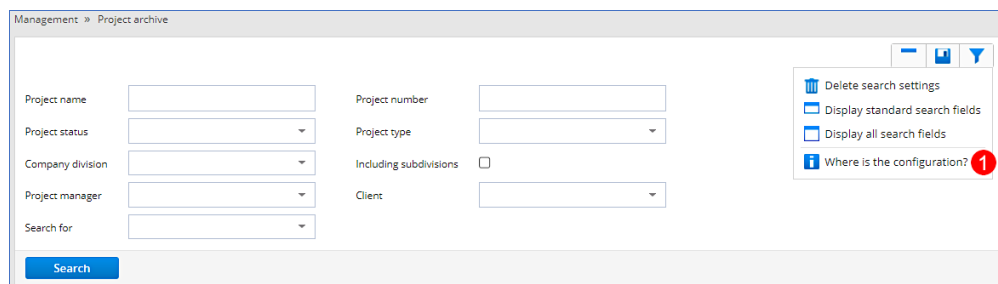
We have added your saved filters as the **Default** in the shortcuts.

The **Configure filters** function is controlled via a separate authorisation in the rights system. To enable you to configure the filters as before, this entry for the other rights group **Everyone** is set to **Show** with the update.

## Feedback function for cloud customers

### Optimise your user experience by providing feedback

With version 24.0, we are adding an integrated feedback function. This is designed to continuously improve the user experience and tailor it to your needs. The function allows you to provide feedback directly from the application to optimise Blue Ant for all users. With the [Configurable filters](#), you can already use this feedback function (1) on some search screens.



The screenshot shows a search interface for 'Project archive' with various filters and a search button. A feedback notification is visible in the top right corner, indicating a configuration issue.

## Security and anonymity of your data

The protection of your data is our top priority. For this reason, we guarantee that all feedback data is collected securely and stored anonymously. The data will not be passed on to third parties.

## Why your feedback is important

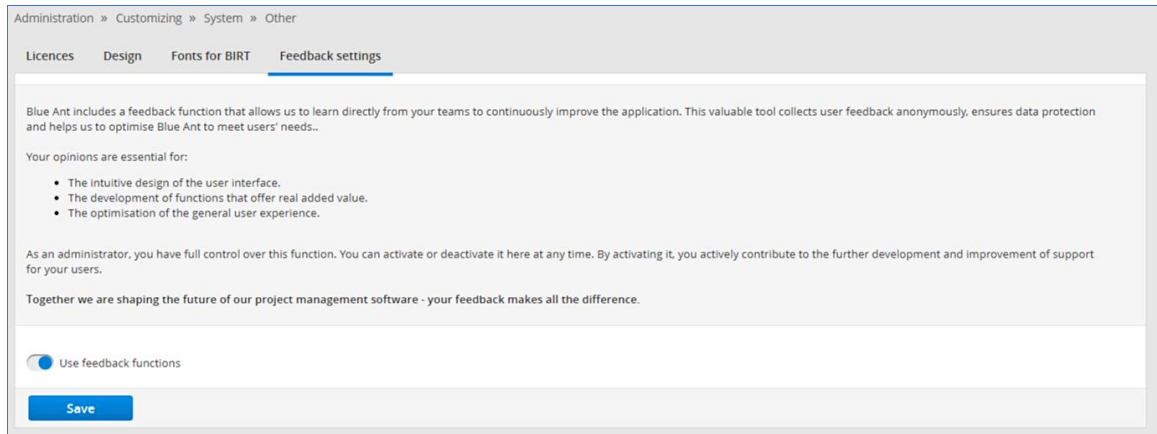
By using the feedback function, you make a significant contribution to the continuous improvement and future design of Blue Ant. Your feedback is the key to creating a product that not only meets your requirements but exceeds them.

- **Direct influence:** Your feedback helps us to make the user interface more intuitive, develop new functions and optimise existing processes.
- **Forward-looking development:** Your feedback enables us to better anticipate future trends and align the product accordingly.
- **Cooperative growth:** We believe in working closely with our users to jointly create the best solution to support your processes.



## Your control over the feedback function

You have full control over the activation of this feedback function. We are convinced that collecting feedback creates added value for everyone. If the function is not suitable for your organisation, you still have the freedom to deactivate it system-wide at any time.



We appreciate your support and trust in us and look forward to receiving your valuable feedback.

## Security-related adjustments

Please be advised of some important security-related updates in Blue Ant that will protect your data even better. These updates are part of our ongoing commitment to ensuring the highest security standards and meeting the latest technical requirements:

- A critical security vulnerability (XXE - XML External Entity Injection) in the SOAP web services has been fixed.
- Extension of the registration process for authorising new users: the administrator now receives a message when authorising users if users are already registered for the employee concerned.
- Standardisation of the response times and error messages of the login methods of SOAP web services to avoid inferences about specific data constellations.



## 2. Dashboards

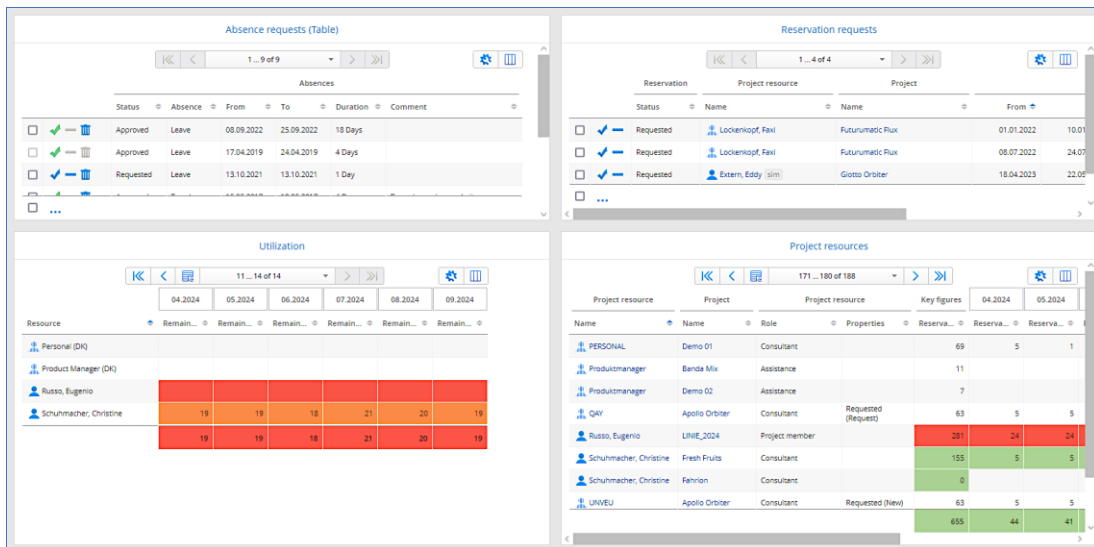
### Dashboard for line managers and resource managers

A new dashboard is available for resource managers and line managers under RESOURCES / DASHBOARD. You can now get a comprehensive overview of your resources and implement important workflows (e.g. approval of absences) using the following widgets:

- **Utilization:** Cumulative display of periodic key figures (availability, reservation, etc.) and information from the **Resource** context
- **Project resources:** Display of periodic key resource figures for each project and information from the **Project** and **Resource** contexts
- **Absence requests:** Display and approval/release of absence requests. These are based on the release roles of the logged-in user and correspond to those of the RELEASES / ABSENCES screen.
- **Reservation requests:** Display and release of reservation requests. These correspond to those of the RELEASES / RESOURCES screen.

You can configure default views under ADMINISTRATION / CUSTOMIZING / TEMPLATES / DASHBOARDS. We initially provide you with the following views:

- Kennzahlen (Key figures)
- Übersicht (Overview)



The screenshot displays a dashboard with four main widgets:

- Absence requests (Table):** A table showing absence requests with columns for Status, Absence, From, To, Duration, and Comment. It lists three entries: two approved leaves and one requested leave.
- Reservation requests:** A table showing reservation requests with columns for Status, Name, Project resource, Project, and From. It lists three requested reservations.
- Utilization:** A grid showing utilization for resources across months from 04.2024 to 09.2024. Resources include Personal (DIQ), Product Manager (OK), Russo, Eugenio, and Schuhmacher, Christine.
- Project resources:** A table showing project resources with columns for Name, Project, Role, Properties, and Key figures. It lists various roles and their associated key figures.

#### Standard view in the dashboard for line managers and resource managers

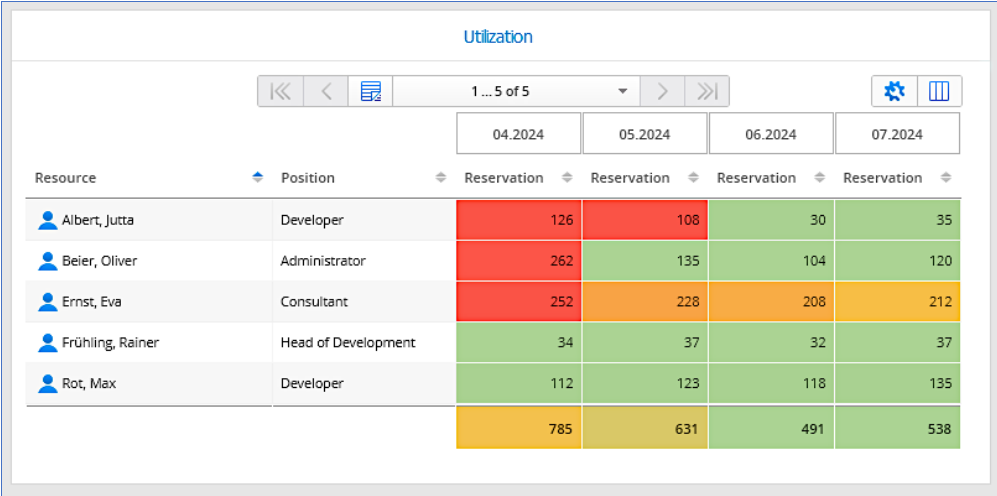
- 🔦 Resources with access rights to the RESOURCES / RESERVATIONS screen automatically have access to this new dashboard.

## Data protection

The columns from the **Resource** context are not initially available for selection as they may contain sensitive data. The administrator must authorise access via the rights system.

## “Utilization” widget

Project managers can already view utilization-specific key figures for each project and resource in the **Project resources** dashboard widget. The new **Utilization** widget now makes this information available for each resource **across all projects**. This widget can therefore be another important tool for team leaders and controllers to optimise processes such as approving reservations and absences.



The screenshot shows the 'Utilization' widget interface. It features a navigation bar with a list icon, a dropdown menu showing '1 ... 5 of 5', and a settings icon. Below the navigation bar are four tabs for the months: 04.2024, 05.2024, 06.2024, and 07.2024. The main table has columns for Resource, Position, and four Reservation columns corresponding to the months. The data is as follows:

Resource	Position	Reservation	Reservation	Reservation	Reservation
Albert, Jutta	Developer	126	108	30	35
Beier, Oliver	Administrator	262	135	104	120
Ernst, Eva	Consultant	252	228	208	212
Frühling, Rainer	Head of Development	34	37	32	37
Rot, Max	Developer	112	123	118	135
		785	631	491	538

### “Utilization” widget

In addition to the general settings of the widget and the table, you can use the following options to customize the widget to suit your needs:



- Settings of the **Utilization** widget:
  - **Group the resources:** Virtual resources can be grouped by position and/or by company division.
  - **Team resources aggregated:** The option allows you to display the cumulative key figures of all team members in a team resource. This corresponds to the key figures of the company division.
  - **Including tickets:** If you use the Blue Ant Tickets module, you can include the key figures Plan and Reservation of ticket participants.
- Settings for the key figures:
  - **Period:** Select the interval of the periods: Week, Month, Quarter or Year.
  - **Number of periods:** Select the number of visible periods.
  - **Display in %:** When activated, all key figures are now displayed as a percentage value instead of in h or MD.

- **Basic value:** Basis for the calculation of percentage values. This value is considered when displaying in per cent and as a heatmap.
- **Display:** Select the **With heatmap** entry so that the key figures are highlighted in colour (green, yellow, red).
- **Limit values:** Define the threshold values for the colour display of the heat map. The selected basic value serves as a reference value.
- **Footer:** Specify whether and how the total is calculated for each key figure.

**Table and filter settings of the “Utilization” widget**

## Navigation

You can choose between two navigation options using the paging element:

- **Scroll by page:** Scroll through the search results with icons (1).
- **Navigate by period:** Navigate through periods with icons (2).
- You can switch to the other mode using  /  (3).

**Navigation in the “Utilization” widget**

## Data protection

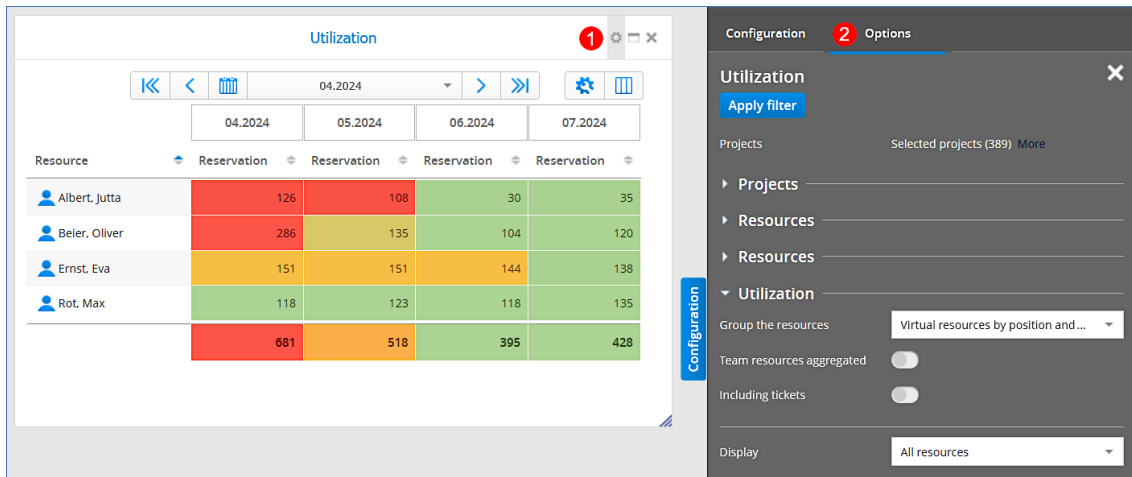
The widget is initially available to users if they have access to RESOURCES / RESERVATION (see also: [Dashboard for line managers and resource managers](#)). The **Utilization** widget is not initially

available for the other dashboards, as it may contain sensitive data. The administrator must therefore authorise its use via the rights system.

- 🔦 The maximum data period corresponds to the information configured under **ADMINISTRATION / CUSTOMIZING / SYSTEM / BATCH RUNS & TIME PERIODS** in the *Periods* tab. For more extensive analyses, you can also use screens such as **RESOURCES / UTILIZATION** or **PROJECTS / CONTROLLING / UTILIZATION**.

## Widget configuration

The ⚙️ **Settings (1)** of the widgets are now always displayed in the **sidebar (2)**. This means that the dashboard and its widgets are not hidden by the configuration and you always have an overview, even when using a wide range of options.



Resource	04.2024	05.2024	06.2024	07.2024
Albert, Jutta	126	108	30	35
Beier, Oliver	286	135	104	120
Ernst, Eva	151	151	144	138
Rot, Max	118	123	118	135
	681	518	395	428


### New display of the widget settings

## 3. Todos

### Copy Todos and ToDo lists

This version provides you with new functions for Todos and ToDo lists:

#### Copy a ToDo


You can use  **Copy ToDo** to copy a ToDo in tables and Kanban boards. In the **Copy ToDo (1)** pop-up, all fields are pre-assigned with the contents of the copied ToDo. The **Status** is set to the default status for new Todos.

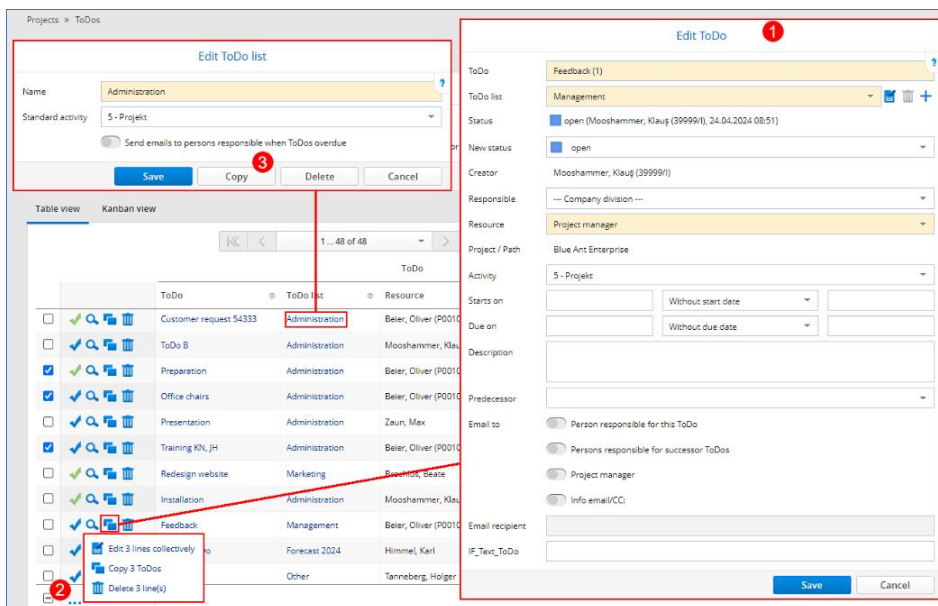
#### Copy multiple Todos

You can use multiple editing (2) to copy several Todos at the same time. The **Status** is set to the default status for new Todos.

#### Copy ToDo lists

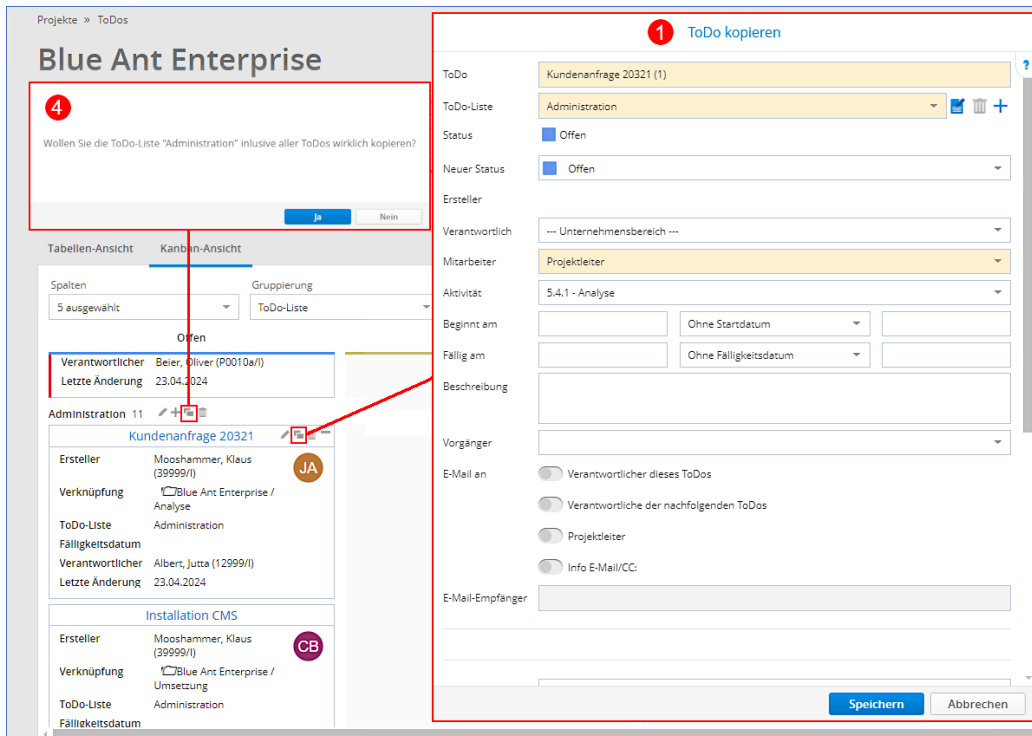
You can now also copy ToDo lists including all Todos:

- Table: **ToDo list pop-up (3)**
- Kanban:  **Copy ToDo action (4)** when the ToDo list grouping is selected



The screenshot illustrates the 'Copy ToDo' functionality. On the left, the 'Edit ToDo list' pop-up is shown with a red box around it and a red circle (3) next to the 'Copy' button. On the right, the 'Edit ToDo' form is shown with a red box around it and a red circle (1) next to the title. The main interface shows a table of Todos with a red box around the 'Administration' row and a red circle (2) next to the 'Copy 3 Todos' button. A red arrow points from the 'Copy 3 Todos' button to the 'Copy' button in the 'Edit ToDo list' pop-up.

### Copy Todos and ToDo lists in tables



The screenshot shows the Blue Ant Enterprise interface. On the left, a Kanban board is visible with a 'ToDo-Liste' column. A red box highlights a confirmation dialog asking: 'Wollen Sie die ToDo-Liste "Administration" inklusive aller ToDos wirklich kopieren?' with 'ja' and 'Nein' buttons. A red arrow points from this dialog to the 'ToDo kopieren' dialog on the right. The 'ToDo kopieren' dialog is titled 'ToDo kopieren' and contains the following fields:

- ToDo: Kundenanfrage 20321 (1)
- ToDo-Liste: Administration
- Status:  Offen
- Neuer Status:  Offen
- Ersteller: --- Unternehmensbereich ---
- Verantwortlich: --- Unternehmensbereich ---
- Mitarbeiter: Projektleiter
- Aktivität: 5.4.1 - Analyse
- Beginnt am:  Ohne Startdatum
- Fällig am:  Ohne Fälligkeitsdatum
- Beschreibung:
- Vorgänger:
- E-Mail an:
  - Verantwortlicher dieses ToDos
  - Verantwortliche der nachfolgenden ToDos
  - Projektleiter
  - Info E-Mail/CC:
- E-Mail-Empfänger:

Buttons at the bottom of the dialog are 'Speichern' and 'Abbrechen'.

### Copy ToDos and ToDo lists in kanban boards

These functions are available on the following screens:

- PROJECTS / TODOS
- CONTROLLING / TODOS
- TICKETS / DETAILS
- ADMINISTRATION / CUSTOMIZING / TEMPLATES / TODO LISTS

## 4. Interfaces

### Quote connector extended to include the quote total

The connector for quotes has been extended. You can now export the quote total in the project currency and in the standard currency.