"Significant time savings and ease of updating resource demand and assignments"

- Project Manager

COMPANY

- Established 160 years ago
- One of the largest insurance companies in the US
- 30,000 employees
- Headquarters in Hartford and New York

KEY BENEFITS

- **Productivity** - Users able to perform the same PPM operations much quicker
- **Quality** - Users update PPM information with higher levels of quality, thus enhancing decision making
- **Agility** - Stakeholders such as Resource Managers are able to fulfill requests faster
- **Interconnectivity** – Users are able to easily integrate PPM data with external data sources such as Excel sheets

THE SCENARIO

The Customer, an insurance giant and Dow Jones 30 company has been using PPM for over a decade, primarily for project, resource, time, and demand management. As heavy and mature users of resource management, they had grown accustomed to the robust, built-in PPM capabilities. At the same time, their users were looking to garner efficiencies in managing these processes, especially for strategic planning and ongoing resource assignments. Given that the data to manage is tabular and numeric in nature, they were hoping to leverage the familiar spreadsheet interface of Microsoft Excel to gain productivity. Although resource management had been the primary driver for XLI, Customer was additionally looking for similar benefits in the Demand Management module and potentially others. While users appreciated the value of having a centralized and logic-heavy system such as PPM, they needed a tool that would enable them to retrieve and update data in a more efficient, validated, and integrated fashion.

THE SOLUTION

The Excel Interface (XLI) by PPMetrics is the first and only true connector between PPM and Microsoft Excel. It is a seamless, turnkey solution that provides the following key capabilities:

- Retrieve, create, and update individual or multiple PPM objects at once
- Retain the integrity of the PPM security model and referential data ("Validations")
- Create Excel-based PPM reports
- Compatible with MS Excel 20xx and PPM 9.x
- Zero customizations to the MicroFocus code base
- No client side installation or configuration – simply download and use

THE IMPLEMENTATION

Unique to the Customer's environment was a PPM architecture that included NTLM, SSO and a retail calendar. The XLI product was first installed and then set up to support this unique configuration. After several sessions between the Customer's PPM team and a PPMetrics expert consultant, XLI was set up in non-production production environment, including several custom XLI configurations:

- Product Branding
- Custom Staffing Profile Fields
- Custom Search Fields
- Demand Management Configurations

Throughout the implementation, multiple enhancements ideas have been proposed by the Customer and most of which were quickly implemented by the PPMetrics development team.

USE CASES

Resource Management

As the primary driver for the XLI implementation, Customer is using the XLI Resource Management capabilities to perform most of their PPM Resource Management operations: creation and updates to Staffing Profile demand positions, resource assignments etc. Customer's largest business unit utilizes all these features for annual planning and ongoing assignment with more business units expected to roll aboard.

Demand Management

A custom "Support Request" had been set up, as a generic and popular method for users to request IT support for their internal platforms. These requests are created in large numbers and updated frequently. As part of the XLI implementation, the tool has been enabled to update Support Requests, including advanced Demand Management capabilities such as required fields, request type rules, multi-select drop downs, and custom data/numbers formats.

THE ROAD AHEAD

Given their immediate success of the XLI with the largest business unit, Customer plans to expand its use in the near future. Along with the increase in users, they seek to broaden the XLI functionality including:

- Work plan management
- User module to update attributes that do not get automatically updated through an integration
- XLI reporting