



EXCEL INTERFACE (XLI) FOR HP PPM – CASE STUDY

“XLI gives our Project & Resource Managers the ability to quickly update staffing data across our global project portfolio, making our users more productive.”

- Mark Carter, Director of EPMO

COMPANY

- One of the world's leading food and beverage companies
- \$66 billion in net revenue in 2014
- 274,000 employees
- Operates in more than 200 countries

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

PepsiCo has been using HP PPM since 2012, primarily for project management, including status reporting, stage gating, deliverable management, and risk, issue, and change management. As it was looking to advance its PPM maturity, it decided to embark on a Resource Management implementation. While the built-in PPM Resource Management capabilities are robust, users were hoping to be able to leverage them by using a more familiar and natural interface for management of tabular and numeric data, namely, Microsoft Excel. Although Resource Management has been the primary driver for XLI, similar requirements have been received for other parts of the PPM product such as Demand and Financial Management. While users appreciated the value of having a centralized and logic-heavy system such as HP 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 HP 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
- Retains the integrity of the PPM security model and referential data (“Validations”)
- Create Excel-based PPM reports
- Compatible with MS Excel 20xx and HP PPM 9.x
- Zero customizations to the HP code base
- No client side installation or configuration – simply download and use

THE IMPLEMENTATION

The XLI implementation involved several sessions between the PepsiCo PPM team and a PPMetrics expert consultant. During these sessions, the XLI was installed in two non-production environments, the use of the product was enabled by the PPM team, and several custom XLI configurations were performed:

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

USE CASES

Resource Management

As Resource Management being the primary driver for the XLI implementation, PepsiCo is using the XLI Resource Management capabilities to perform most of their PPM Resource Management operations: creation of Staffing Profiles, updates to Staffing Profile demand positions, and resource assignments to both Staffing Profiles and Resource Pools.

Demand Management

PepsiCo has been using a custom Demand Management Work Request for years, as a generic and highly popular vehicle for requesting and fulfilling a variety of IT requests. As part of the XLI implementation, the tool has been enabled to update Work Requests through its Excel interface, including advanced Demand Management capabilities such as required fields, request type rules, multi-select drop downs, and custom data/numbers formats.

* Entity Type		* Previous Years	* Future Years	* Time Period	* Display Figures in	* Display Allocated...	* Display Fields
Asset	0	0	Weeks	FTE	N	None	
Project	1	1	Months	Hours	Y	Financial Fields	
Proposal	2	2	Quarters	Person Days		Resource Fields	
	3	3	Years			User Data (Custom)	

Delete (Y/N)	* Staffing Profile Name	* Role	* Position Label	Status	Jan-2015	Feb-2015	Mar-2015	Apr-2015	May-2015	Jun-2015
	ACME Company Intranet	Architect	Architect	Soft Booked	308.31	304.00	528.00	528.00	480.00	528.00
			Cheryl Wilson	Soft Booked	160.00	152.00	176.00	176.00	160.00	176.00
			Dave Olson	Committed	168.00	152.00	176.00	176.00	160.00	176.00
			Andy Madison	Committed	160.00	152.00	176.00	176.00	160.00	176.00
			Demand Balance		-171.69	-152.00	0.00	0.00	0.00	0.00

THE ROAD AHEAD

Given their immediate success with the XLI, PepsiCo plans to expand its use in the near future. As their PPM implementation grows and expands, so will the XLI, in terms of both user base and functionality:

- Rollouts to additional user groups are scheduled
- Deployment of XLI Financial Management functionality
- Enablement of XLI to manage additional types of PPM requests