



Micro Focus Integration Partner

Excel Interface (XLI) for Micro Focus PPM

When it comes to entering and maintaining tabular data, Microsoft Excel® spreadsheets are the solution of choice. The Excel Interface (XLI) for Micro Focus Project and Portfolio Management™ from PPMetrics loads Micro Focus PPM data into Excel, enabling users to quickly and seamlessly update PPM information using Excel's familiar interface and advanced capabilities, formatting it to their needs, and sending it to interested parties.

Whether you are a project manager who has to update your own project's work plan, resource, and financial data, a resource manager who has to maintain the organizational resource capacity, or an IT finance person who needs to verify time entry against vendor invoices, the XLI enables you to use Excel's interface to manage your data entry work and simplify general reporting. Beyond the individual user benefits, the XLI makes it easier to perform mass updates within your PPM implementation and enables integration with multiple data sources that may use CSV or any other Excel recognized formats for data exchange.

FEATURES

- Retrieve, create, and update individual or multiple PPM objects at once
- Use Excel's built-in user interface capabilities
- Utilize unique governance and control capabilities
- Retain the integrity of the PPM security model and referential data (PPM "Validations")
- Integrate PPM data with external data sources
- Create Excel-based PPM reports accessible through the XLI environment

TECHNICAL DETAILS

- No client-side installation or configuration - simple download and use
- Compatible with MS Excel 20xx and MF PPM 9.x
- Compatible with MF SaaS
- Zero customizations to Micro Focus code base

BENEFITS

- **Increase productivity** by working on PPM data offline and using Excel's UI and advanced capabilities
- **Integrate** PPM data with external data sources
- **Increase the quality** of PPM's data through Excel formulas, functions, and data validations
- **Improve decision making:** use the powerful data analysis and reporting capabilities of Excel



Resource Management: Regardless of your PPM configuration, use the XLI to quickly enter, maintain, and share Staffing Profile and Resource Pool records. Utilize our unique productivity enhancers such as line level filtering and mass replacement for added speed and accuracy.



Financial Management: Leverage the power of Excel formulas and calculations to reduce manual data entry and create more accurate forecasts and actuals. Create simple integrations with other financial systems and automatically synchronize invoices.

* Entity ...	* From...	* To Y...	* Metric
Program	2017	2019	Approved Budget
Project	2018	2020	Benefits
Proposal	2019	2021	Cost
Request	2020	2022	

(Enter any part of name or IDs)			
Delete (V)	* Entity Name	* Expense Type	* Labor Typ
	2020 - SAP Upgrade #41783 (USD)	Operating	Non-Labor
	2020 - SAP Upgrade #41783 (USD)	Operating	Non-Labor
	2020 - SAP Upgrade #41783 (USD)	Operating	Labor
	2020 - SAP Upgrade #41783 (USD)	Operating	Labor
	2020 - SAP Upgrade #41783 (USD)	Operating	Non-Labor
	2020 - SAP Upgrade #41783 (USD)	Operating	Non-Labor



Demand Management: Update, create or delete any type of PPM request and project form, individually or in bulk, while retaining field attributes including required fields, rules, drop downs, and security settings.



Project Management: Manage multiple work plans all at once, including unique integrations with other modules, while configuring this module to your organization's level of project management and hiding unused functionality.



Time Management: Create, edit, submit, and approve any number of time sheets while automatically inheriting your time policies and utilizing a single screen full of shortcuts and no pop-ups.

SAVE TIME, ENHANCE DATA QUALITY, SIMPLIFY DATA INTEGRATION

With the XLI, your team can update critical PPM information faster and more accurately than ever, while integrating it with relevant data sources, performing detailed number crunching, and formatting it to their needs. Leverage the familiar interface and powerful capabilities of a spreadsheet to manage PPM the Excel way!