
Excel Interface (XLI) For Micro Focus

PPMetrics – User Management User Guide

Document Version: 1.4
Document Release Date: January 2019

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1. Introduction

- ▶ **In this document, for brevity, the term “XLI” is used to refer to the Excel Interface Add-on for Micro Focus PPM**

This document provides information about the use of the XLI. It was written for:

- PPM end users
- PPM technical support personnel

The XLI is an alternative interface for PPM based on Microsoft Excel. For end users, it is simply a macro-enabled Excel workbook. In this workbook, there are several tabs corresponding to certain functionalities of the different modules of PPM. This document shows users how to work with the XLI features intended for PPM user account and resource management.

2. Excel Compatibility

Each XLI workbook is compatible with one or more Microsoft Excel versions. If a user tries opening the XLI with an Excel version for which your organization does not have a compatible XLI version, he will receive an error message and the XLI will shut down. If a user with an Excel compatible version tries opening an old version of the XLI template, a link to the correct version will automatically open up, thus allowing him to download the current version.

The XLI has been designed to display optimally with a resolution of 1024*768.

3. Security

The XLI workbook and worksheets are protected, with the exception of the "USER_CALCULATIONS(1-3)" tab(s). Only features and worksheet cells that are meant to be updated by end users are unlocked. If there is a chance that the XLI workbook has been corrupted, simply download a fresh copy from the server using the URL provided by your PPM administrator.

The XLI automatically inherits the security rights of the PPM user logged on to XLI. It may not be used to bypass the PPM security model, regardless of whether it has been customized or not.

4. Performance

When various XLI operations are performed for the first time in a new session (e.g. Search Staffing Profiles) they tend to execute slower than in subsequent times. If the XLI seems frozen or non-responsive while performing a resource-intensive operation, simply allow it to complete its execution by waiting.

5. Active Files Concurrency

While using the XLI, do not have other Excel files open and keep all Windows applications minimized.

6. General XLI Data Retrieval and Update Information

Most of the XLI worksheets (e.g. Staffing Profiles, Financial Summaries) operate in a similar fashion:

1. Search criteria are entered.
 2. One or more PPM entities are retrieved to Excel.
 3. Data updates are manually made to the retrieved entities.
 4. All updates are sent back to PPM in a single "Save" operation.
 5. When the XLI completes saving the updates to PPM, it re-pulls the data of the chosen entities to the XLI workbook.
- Note that the XLI automatically synchronizes relevant lookups ("PPM Validations") with PPM. For example, if a new "role" is added to PPM then you will see it as soon as you open the "STAFFING_PROFILE" sheet the next time.

Refreshing Data

All the XLI worksheets have a "Refresh" button, which pulls the latest data from PPM based on the user's settings. Clicking the refresh button is useful in situations where the XLI data on the screen has been updated by another user and there is a need to retrieve the latest data, there is a need to discard data updates made through the XLI, or the XLI seems to be in an erroneous state.



Fig. 1 Refresh button shown in red.

Tracking Data Changes

As a usability feature, the XLI automatically highlights cells updated by the user, which have yet to be saved to PPM.

	Delete (Y)	* Staffing Profile Name	* Role	* Position Label	Resource Type	Reso
16					Bcard Asia & Africa BA4 Permanent	
17		ACME Company Intranet	Business Analyst	Business Analyst	Tech	GIS Consultants
18		ACME Company Intranet	CIO	▼ D	BAGL Asia & Africa BA1 SI Partner	QA Commercial
19		ACME Company Intranet	Architekt - Applikationen	Architekt - Applikationen	BAGL Asia & Africa BA1 SI Partner	GIS Consultants

Fig. 2 The orange cells indicate unsaved changes by the user. Changed rows are highlighted on left.

Other Information

- Whenever possible, the XLI notifies users of errors as they occur rather than when updates are sent back to PPM. For errors which can only be detected when the data updates are sent back to PPM, the XLI attempts to save non-erroneous entities and notifies the user of the erroneous entities at the end of the execution.

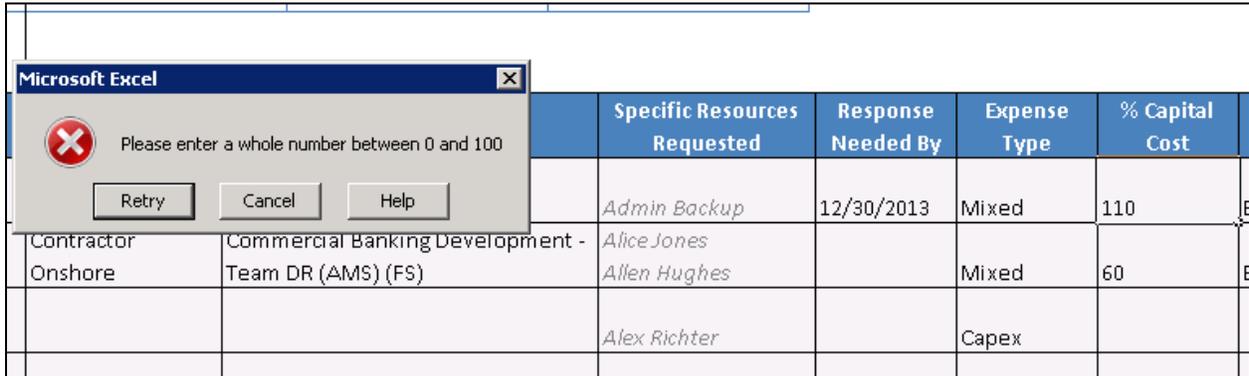


Fig. 3 Example of XLI native error handling.

- The “USER_CALCULATIONS(1-3)” worksheets, blank and unlocked, are intended to be used as “scrap paper” for users, for any purpose they wish.

7. Logging On

Prior to using the XLI, end users must be connected to their network to be able to log on to PPM.

Simply enter the PPM username and PPM password and click the ‘Logon’ button  to open the XLI.

XLI URL:

PPM Users URL:

PPM Web Services URL:

Set Temporary Passwords for Admins Enable SSO Logon

PPM Username:

PPM Password:

Show URL's

V7.0 Internal Package 3 Build 7475

Fig. 4 PPM username and password are entered the first time the XLI is used.

When the XLI is opened in subsequent times, the PPM credentials get automatically and optionally pre-populated (SSO), for as long as it is opened by the same Windows user. In case the PPM password changes, the user must re-enter their password into the XLI.

- ▶ Note that as an optional configuration of full single-sign-on may be enabled for XLI, in which case users bypass the logon screen altogether.

XLI URL:

PPM Users URL:

PPM Web Services URL:

Set Temporary Passwords for Admins Enable SSO Logon

PPM Username:

PPM Password:

Show URL's

V7.0 Internal Package 3 Build 7475

Fig. 5 User's credential information is retained after the first time.

8. Working with Users

Once a user opens the User worksheet, validations (lookups) used by that sheet get automatically refreshed. If there is a chance that a validation has changed while the XLI is open, the user can flip to the USER_CALCULATIONS(1-3) tab(s) and then back to initiate a refresh.

Also, when the sheet is opened, the XLI will alert the user if the users that had previously been retrieved were updated by another user, in which case the user should hit "Refresh."

Data Retrieval

- There is one main slicer on top of the worksheet requiring the user to make a selection for the correct attributes to display. The asterisk (*) next to the slicer indicates that a selection is required. The 'Search' or magnifying glass button is also not enabled until a selection is made.
 - User: Display PPM user attributes that would be found in the user account management module of the Workbench
 - Resource: Display PPM resource attributes which would be found in the dashboard
 - Both: Display both user and resource attributes from the Workbench and dashboard interfaces
- Once a slicer has been selected, the 'Search' button becomes enabled. If any part of the user's last name is known, it may be entered into the text box, followed by a click on the 'Search' button.

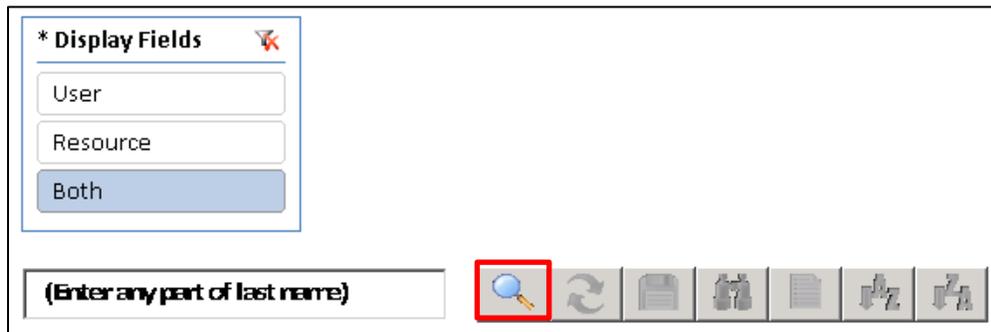


Fig. 6 Once a slicer option has been selected, the 'Search' button becomes enabled.

- When the magnifying glass button is clicked, the Users search screen pops up and additional search criteria may be specified. Search criteria are broken up into Resource Filters, User Filters, and Custom Filters. When all the desired filter fields have been entered, clicking the 'Search' button retrieves all the matching users that are updateable by the user based on the PPM security model.
- ▶ Note that clicking on the 'Search' button will take into account all the search criteria entered in the three (3) categories.

List of search fields for the Resource Filters include:

- Username Contains – Any part of the user's username
- First Name Contains – Any part of the user's first name
- Department – The user's department
- Manager Contains – Any part of the name of the user's manager
- Org Unit – The user's org unit membership
- Security Group – The user's security group membership
- Enabled – Whether the user is enabled or not
- Time Approver – The user's time approver
- Cost Category – The user's cost category
- Role – The user's role as defined in PPM
- Last Name Contains – Any part of the user's last name
- Skill – Any of the skills the user possesses as defined in PPM
- Region – The user's region
- Location – The user's location
- Category – The user's resource category
- Time Sheet Policy – The user's time sheet policy
- Title – The user's department
- Member of Pool – Resource pools that a user may be a member of

The screenshot shows a 'Search Users' window with three tabs: 'Resource Filters', 'User Filters', and 'Custom Filters'. The 'Resource Filters' tab is active. It contains various search criteria fields such as 'Username Contains', 'First Name Contains', 'Department', 'Manager Contains', 'Org Unit', 'Security Group', 'Enabled', 'Time Approver', and 'Cost Category'. On the right side, there are additional fields for 'Role', 'Last Name Contains', 'Skill', 'Region', 'Location', 'Category', 'Time Sheet Policy', 'Title', and 'Member of Pool'. Each field has a 'Select' and 'Clear' button. Below the filters are 'Search' and 'Clear filters' buttons. A table displays the search results with columns for Username, Full Name, Department, and Enabled. A magnifying glass icon is overlaid on the bottom right of the window.

Username	Full Name	Department	Enabled
jadams	Bernard Adams	Application Service	Y
jgoodman	Chad Goodman	Application Service	Y
john_qc	Devin Hayes	Application Service	Y
jluke	Donald Luke	Application Service	Y
jclinton	Frida Clifton	Application Service	Y
jvicks	Hamilton Vicks	Application Service	Y
jlowel	Jim Lowell	Application Service	Y
jroth	John Roth	Application Service	Y
jsmith	John Smith	Application Service	Y
jlange	Jonas Lange	Application Service	Y
jbanks	Joseph Banks	Application Service	Y

(15 result/s)

Fig. 7 Search results based on selection criteria of selected filters. Only filters from Resource Filters were added.

- The additional search criteria available under User Filters contain a few duplicate filter fields from the Resource Filters mirroring similar functionality in the different PPM interfaces. If any filters were originally selected under the Resource Filters, their criteria will be copied to the User Filters screen for reference and ease of updating. When all the desired filter fields have been entered, clicking the 'Search' button retrieves all the matching users that are updateable by the user based on the PPM security model. List of search fields for the User Filters include:
 - Username Contains – Any part of the user's username
 - First Name Contains – Any part of the user's first name
 - Product Contains – Which product licenses the user has been assigned
 - Company Contains – What company the user is a part of
 - Enabled – Whether the user is enabled or not
 - Last Name Contains – Any part of the user's last name
 - Security Group – The user's security group membership

Search Users

Resource Filters | **User Filters** | Custom Filters

Username Contains:

Enabled: Yes

First Name Contains: John

Last Name Contains:

Product:

Security Group: Business Analyst (#30291);Business User (#30411);

Company:

Username	Full Name	Department	Enabled
jroth	John Roth	Application Service	Y
jsmith	John Smith	Application Service	Y

Select All (2 result/s)



Fig. 8 Search results based on selection criteria of selected filters from both Resource Filters and User Filters.

- If user user-data has been set up in PPM, the PPM/XLI Admin can configure optional custom search criteria and they will appear under Custom Filters. When all the desired custom filter fields have been entered, clicking the 'Search' button retrieves all the matching users that are updateable by the user based on the PPM security model.

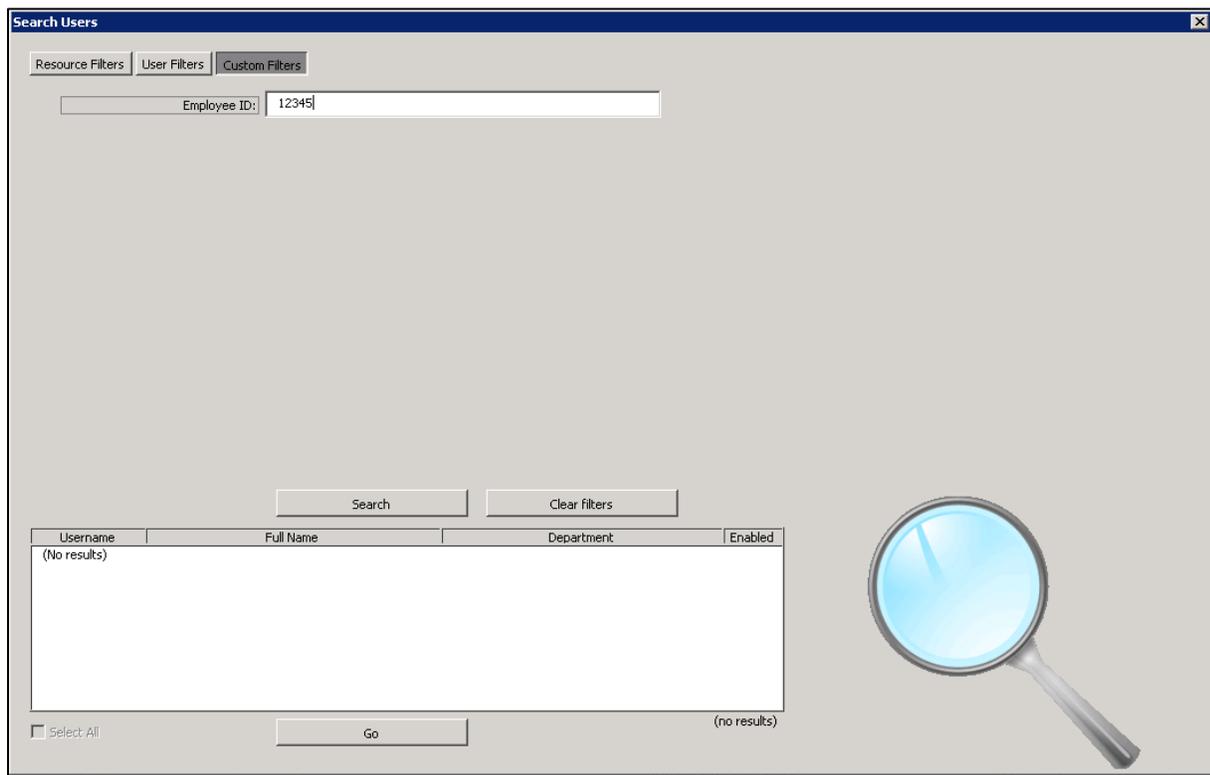


Fig. 9 Custom search criteria configured by the PPM/XLI admin can be found here.

- From the results, the user selects which of the users to retrieve by clicking on single or multiple entities and then clicking 'Go.'

(Enter any part of last name)						
Disable (Y)	* First Name	* Last Name	* User Name	Enabled	Last Logon	Reset Password
	Bernard	Adams	jadams	Y		
	Chad	Goodman	jgoodman	Y		
	Devin	Hayes	john_qc	Y		
	Donald	Luke	jluke	Y		
	Frida	Clifton	jclifton	Y	4/16/2010 12:36	
	Hamilton	Vicks	jvicks	Y		
	Jim	Lowell	jlowel	Y		
	John	Roth	jroth	Y		
	John	Smith	jsmith	Y	8/21/2017 6:58	
	Jonas	Lange	jlange	Y		
	Joseph	Banks	jbanks	Y	3/15/2017 11:08	
	Lara	Jones	jjones	Y		
	Lara	Jones	ljones2	Y		
	Roger	Miller	jmiller	Y		
	Sarah	Karl	skarlan	Y		

FINANCIAL_SUMMARY / FINANCIAL_DETAILS / FINANCIAL_DETAILS_DATA_FEED / STAFFING_PROFILE / RESOURCE_POOL_PARTICIPATION

Running Query #2

Fig. 10 Status bar displays progress information as users are retrieved into the XLI.

Updates

- Once the selected users haven been loaded into the XLI, the user may manually make updates in the cells and hit the 'Save' button  to upload the changes back to PPM.
- ▶ Remember that the XLI honors the PPM security of the user and core system logic which dictates which sections should be updateable (user and/or resource).

Disable User

* denotes required field

Disable (Y)	* First Name	* Last Name	* User Name	Enabled	Last Logon	Reset Password	Company	Email	Phone	Start Date	End Date	New Password on Login	Password Expiration
	Donald	Luke	l Luke	Y			Analog Analytics	l Luke@acme.com		1/1/2007		N	90
	Frida	Clifton	jclifton	Y	4/16/2010 12:36		Analog Analytics	jclifton@acme.com		1/16/2007		N	90
	Hamilton	Vicks	jvicks	Y			Guard	jvicks@acme.com		1/16/2007		N	90
	Jim	Lowell	jlowel	Y			Analog Analytics	jlowel@acme.com		1/16/2007		N	90
	John	Roth	jroth	Y			Analog Analytics	jroth@acme.com		1/1/2008		N	90
	John	Smith	jsmith	Y	8/21/2017 6:58		Analog Analytics	jsmith@acme.com		3/1/2013		N	9000
	Jonas	Lange	jlange	Y			Analog Analytics	jlange@acme.com		1/16/2007		N	90
	Joseph	Banks	jbanks	Y	3/15/2017 11:08		Analog Analytics	jbanks@acme.com		1/1/2007		N	90
	Lara	Jones	ljones	Y			Analog Analytics	ljones@acme.com		1/16/2007		N	90
	Lara	Jones	ljones2	Y			Analog Analytics	ljones2@acme.com		1/16/2007		N	90
	Roger	Miller	jmillier	Y			Analog Analytics	jmillier@acme.com		1/16/2007		N	90
	Sarah	Kaplan	skaplan	Y			Analog Analytics	skaplan@acme.com		3/1/2007		N	90
	Eng	Eng	leng					leng@acme.com				Y	90

User's name serves as link to PPM

Fig. 10 Results screen with users retrieved and edits being made. A new user is also being created in the last row of the sheet by simply entering the required fields.

Additional Editing Features

- XLI provides a feature to easily copy single or multiple user lines:
 - From the left side of XLI, click on the row or rows (contiguous or not).
 - The XLI then asks the user whether to 'Copy Lines.'
 - If 'Yes', the XLI will paste the copied lines to the bottom of the last retrieved row of data. Note that all the visible cells get copied.

Disable (Y)	* First Name	* Last Name	* User Name	Enabled	Last Logon	Reset Password	Company	Email	Phone	Start Date	End Date
	Jim	Lowell	jlowel	Y			Analog Analytics	jlowel@acme.com		1/16/2007	
	John	Roth	jroth	Y			Analog Analytics	jroth@acme.com		1/1/2008	
	John	Smith	jsmith	Y	8/21/2017 6:58		Ana	e.com		3/1/2013	
	Jonas	Lange	jlange	Y			Ana	e.com		1/16/2007	
	Joseph	Banks	jbanks	Y	3/15/2017 11:08		Ana	e.com		1/1/2007	
	Lara	Jones	ljones	Y			Analog Analytics	ljones@acme.com		1/16/2007	
	Lara	Jones	ljones2	Y			Analog Analytics	ljones@acme.com		1/16/2007	
	Roger	Miller	jmillier	Y			Analog Analytics	jmillier@acme.com		1/16/2007	
	Sarah	Kaplan	skaplan	Y			Analog Analytics	skaplan@acme.com		3/1/2007	

Fig. 11 XLI prompting user whether or not to copy the selected user lines.

- Sorting in ascending or descending order is available for all the columns. To apply a sort, click on any single cell of the column you would like to sort by, other than the column's caption, and click on one of the sorting buttons . Note that after sending your updates to PPM, the sort order applied by the user is not preserved.
- Performing mass value replacement is available for all enabled columns. Stand on any single cell below the captions row of an editable column to enable the XLI replacement button. When the column uses a drop-down list, the same drop-down values are displayed on the replacement form. When the column is either free text or auto-complete, text boxes are displayed and partial searches/replacements are made. All the logic and product behavior remains the same when values are updated this way, and the replace operation is always limited to the same column that has been highlighted.
- If the selected cell(s) correspond to an auto-complete List in PPM, the Pick List button  becomes enabled and when clicked, will bring a pop up screen where selections can be made.
 - An auto-complete enabled cell will attempt to auto fill the cell with the selection that best matches any characters that the user has typed/pasted into the cell. If there are multiple possibilities, the XLI bring up a pop up screen when enter is pressed to allow searching for the selection based on the user entered text. Note that multiple cells may be highlighted and filled out this way at once.