Excel Interface (XLI)
For Micro Focus

PPMetrics – Support Guide

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PPMetrics.

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1. Introduction

➤ **In this document, for brevity, the term "XLI" is used to refer to the Excel Interface Add-on.**

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

- 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 provides administrators of the XLI and/or of PPM guidance on troubleshooting and supporting the XLI for end users.

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, user 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.

➤ In general, always check that the user has downloaded a fresh copy from the specific location designated by the PPM administrator and that they are using the correct version.

The XLI has been designed to display optimally with a resolution of 1024*768, although it is not required.

Security

To use the XLI, the user must be a licensed PPM user and a member of the "*XL – XLI Users"* security group. This is done to prevent unauthorized use of the XLI even though they may have access to the file.

Remember that 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.

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. Same holds true for the initial logon process, for XLI SSO enabled environment in particular, the transaction may be slow so please wait until the XLI completes the logon operation or notifies you of an error.

Active Files Concurrency

While using the XLI, do not have other Excel files open and keep all Windows applications minimized (shortcut Win+D).

2. Troubleshooting Common XLI Issues

General Troubleshooting Approach

Unexpected product behavior or uninformative error messages should generally be addressed in the following order (re-test after each step):

1. If unsure whether the product is operating as designed, refer to the product's manuals.
2. Ensure connectivity to the XLI and PPM processes (see next section).
3. Hit the XLI "Refresh" button to bring fresh data back from PPM.
4. Re-open the XLI workbook, without any other Excel files open.
5. Download a fresh copy of the XLI from your organization's designated location.

Connectivity Issues

Connectivity issues are normally identified through an informative error message (e.g. "Cannot connect to the XLI web service"). When they occur, first verify that the user is connected to the corporate network. Additionally, in XLI SSO environments, you should initiate a new session to the PPM dashboard through Internet Explorer and try again.

If it is confirmed that the user is connected to the corporate network but errors keep coming, verify the XLI's connectivity URLs (as they appear on the XLI logon screen) to the server. Under normal cases, the URLs specified on the XLI logon screen will be accurate and validated by the PPM administrator. To test the connectivity to the XLI server via the XLI URL, open the browser and type the following URL:

http://[XLI_URL]/GetValidationValues?wsdl

A screen similar to below should be returned. If not, there may be a network issue preventing access or the URL is incorrect.

```xml
<?xml version="1.0" encoding="UTF-8"?>
<!-- Published by JAX-WS RI at http://jax-ws.dev.java.net. RI's version is JAX-WS RI 2.2.4-b01. -->
<!-- Generated by JAX-WS RI at http://jax-ws.dev.java.net. RI's version is JAX-WS RI 2.2.4-b01. -->
- <definitions Name="GetValidationValuesService" targetNamespace="http://service.ppmetrics.com/"
  xmlns:soap="http://schemas.xmlsoap.org/wsdl/soap/" xmlns:wsam="http://www.w3.org/2007/
  xmlns:wsu="http://docs.oasis-open.org/wss/2004/01/oasis-200401-wss-wssecurity-utility-1.0.x
    - <types>
        - <xsd:schema>
            <xsd:import schemaLocation="http://gbrpsr000002964.intranet.barcapint.com:8900/Ge
          </xsd:schema>
      </types>
    - <message name="GetValidationValuesCons">
        <part name="parameters" element="tns:GetValidationValuesCons"/>
      </message>
    - <message name="GetValidationValuesConsResponse">
        <part name="parameters" element="tns:GetValidationValuesConsResponse"/>
      </message>
    - <message name="Exception">
        <part name="fault" element="tns:Exception"/>
      </message>
    - <portType name="GetValidationValues">
        - <operation name="GetValidationValuesCons">
            <input message="tns:GetValidationValuesCons" wsam:Action="http://service.ppmetrics.
            <output message="tns:GetValidationValuesConsResponse" wsam:Action="http://service.
            <fault message="tns:Exception" name="Exception" wsam:Action="http://service.ppmetri
          </operation>
```

Another test that can be run is against the PPM Web Services URL. You can check connectivity by opening a browser and entering:

http://[PPM Web Services URL]/itg/rest/requestTypes?username=USERNAME&password=PASSWORD

➤ Note that the USERNAME and PASSWORD should be replaced with a valid PPM username and their password.
➤ Note that for XLI SSO enabled environments, the [PPM Users URL] parameter should be used instead.

The browser should return a list of request types as per below screenshot:

```xml
<?xml version="1.0" encoding="UTF-8" standalone="true"?>
<ns2:requestTypes xmlns:ns2="http://www.hp.com/ppm/dm/">
 - <requestType>
       <id>30980</id>
       <name>NAV-PCI-Refresh</name>
       <description>Request to refresh Projects cost interface</description>
   </requestType>
 - <requestType>
       <id>31200</id>
       <name>Nav - Access Request</name>
       <description>New Access Requst Tool</description>
   </requestType>
 - <requestType>
       <id>31201</id>
       <name>Nav - Access Request - Champions</name>
       <description>New Access Requst Tool</description>
   </requestType>
 - <requestType>
       <id>31202</id>
       <name>Nav - Access Request - Role</name>
       <description>New Access Requst Tool</description>
   </requestType>
 - <requestType>
       <id>30900</id>
       <name>Nav - Password Reset Request</name>
       <description>This request is for IT service desk to reset Navigator user account password or SSO enable</description>
   </requestType>
 - <requestType>
```

Known Excel Issues

Excel File Corruption

In rare occasions, the XLI Excel file get corrupted. When that happens, users receive random error messages in response to many different standard transactions. Instead of trying to use the Microsoft repair function, it is recommended to simply download a fresh XLI workbook from the shared location.

Missing VBA References

The XLI makes heavy use of built-in Microsoft VBA code libraries. Although all these essential libraries come with the default Office installation, at times they are missing and, as a result, the XLI becomes non-functional and users receive error messages such as "Used-defined type not defined" or "Compile Error in Hidden Module".

The XLI's required references are the following:
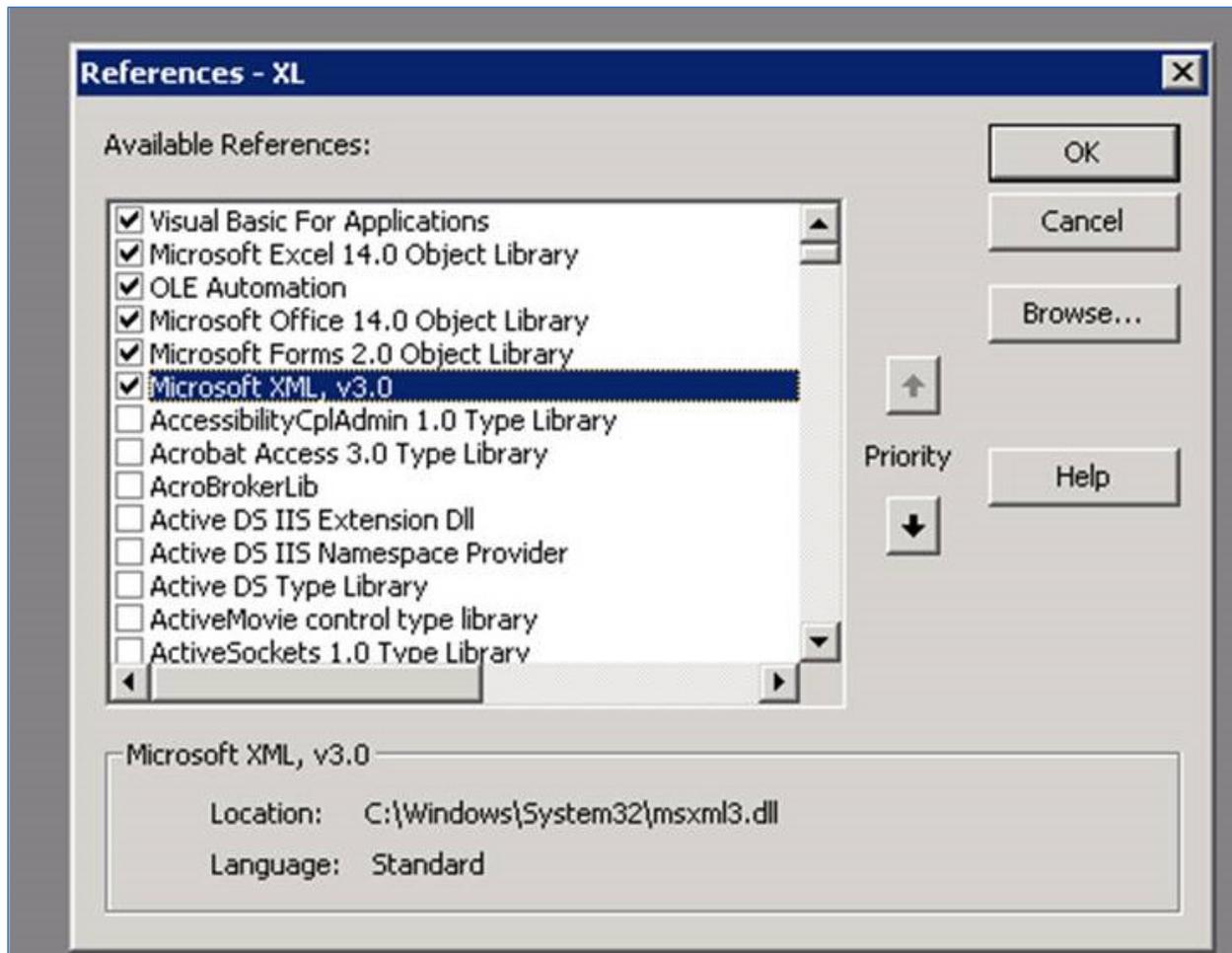
To verify that the user has these code libraries, open any Excel workbook, click on Alt+F11 to open up the VBA window, then click on "Tools -> References" and ensure that the references above exist on the user's machine. If they don't, you may be copy and register the missing ones from another machine. If they do, please contact support@ppmetrics.com

Active-X Technology Malfunctioning

The XLI relies on Microsoft Active-X technology for its operation. There is a known Microsoft issue which causes Active-X to be disabled across all Excel files on the user's machine. In those cases, none of the XLI controls are responsive and typically an error message is displayed as soon as the XLI is activated. A simple test using the embedded spreadsheet can be given to the user to test that Active-X is functioning correctly.

SimpleXLI_ActiveX_T
est.xlsm

If Active X is not working correctly, take the steps below to remove .exd files from the user's machine:

1) Ask the user to close all Office applications.

2) Perform a search in Windows Explorer – make sure to include hidden and system files and folders – for *.exd files (note: that's not *.exe) and delete any that are found.
3) Make sure that these files are deleted:

C:\users\[username]\AppData\Local\Temp\Excel8.0\MSForms.exd

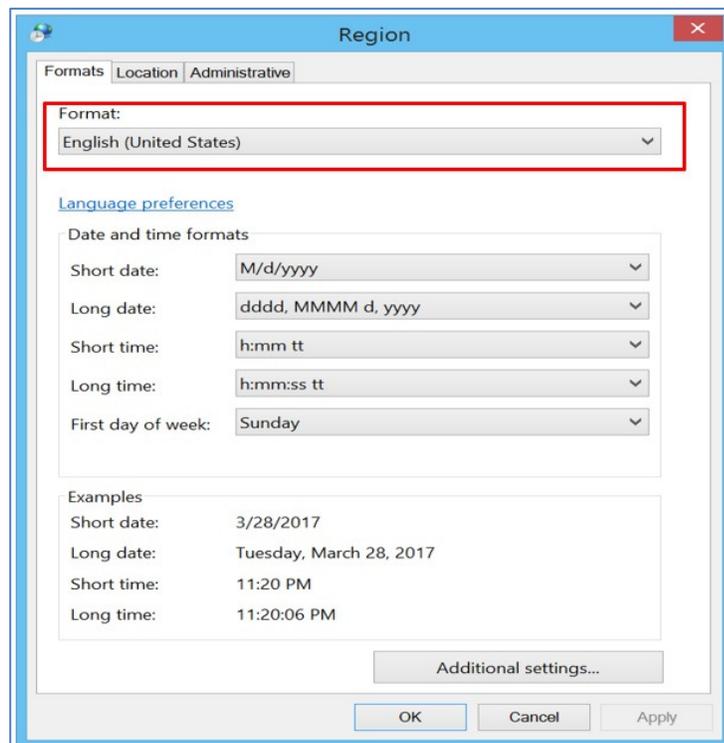*C:\users\[username]\AppData\Local\Temp\VBE\MSForms.exd*

More info in the following articles:
http://excelmatters.com/2014/12/10/office-update-breaks-activex-controls/

https://blogs.technet.microsoft.com/office_sustained_engineering/2014/12/12/update-office-2010-activex-disabled-december-update-kb2553154/

Windows Settings Issues

Ensure that the user's Windows regional format matches his PPM profile: