



EXCEL INTERFACE (XLI) FOR MICROFOCUS PPM – CASE STUDY

THE SCENARIO

The customer, a global information technology company, has been using Micro Focus PPM since November 2012, primarily to manage project, resources, detailed financials, and time entries of long-term projects. Cost lines in project financial summaries would number in the 100's and often be in multiple currencies. As a highly mature customer, they also rely heavily on portfolio management scenario comparisons while leveraging the product's unique capabilities in this area. While many customers look to leverage the UI of the XLI to garner efficiencies in managing their data and processes, the customer was also looking to leverage XLI's unique capabilities to replace customizations with out-of-the-box XLI functionality and enforce business rules not possible otherwise.

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
- Create Excel-based PPM reports
- Retain the integrity of the PPM security model and referential data ("Validations")
- Compatible with MS Excel 20xx and PPM 9.x
- Implement advanced governance and control capabilities
- Zero customizations to the Micro Focus code base
- No client-side installation or configuration – simply download and use

USE CASES

Unique XLI Capabilities

Financial Management was the primary module for the implementation, including several unique XLI capabilities:

- Lock down desired financial periods (e.g. prevent updating actuals for past months)
- Security to prevent expense owner linked to each financial line from viewing/editing lines that do not belong to them
- Stronger concurrency management and conflict resolution to prevent multiple expense owners from updating the same financial summary without ever losing updates
- Entry of multiple currencies on the same financial summary

It's a big improvement, since it allows better visibility, filtering and sorting, thus it is faster and less error prone. My productivity has definitely increased.

- SWQA manager, PPM user since 2012

COMPANY

- American multinational information technology company
- 55,000 employees
- Headquartered in Palo Alto, California

KEY BENEFITS

- **Productivity** - Users are able to perform the same PPM operations much quicker
- **Functionality** - New functionality made available and enabled replacement of heavy customizations
- **Governance** - The organization is able to enforce business rules and ensure data integrity at new levels
- **Quality** - Users update PPM information with higher levels of quality, thus enhancing decision making

Delete (Y)	* Entity Name	* Labor Type	* Category	* Cost Description (Custom)	* Currency (Custom)	Expense Owner (Custom)	* Resource Pool (Custom)	Plan	Actual	Plan	Actual
	Email Server Migration (USD)	Non-Labor	Equipment	Metals	USD	Joe Klein	Global	24,370	21,933	24,370	21,933
	Email Server Migration (USD)	Non-Labor	External Labor, Engineers	Service station	EUR	Jimmy Lin	Industrial	800	720	5,999	5,399
	Email Server Migration (USD)	Non-Labor	External Labor, Engineers	Desktop related	EUR	Herbert Levy	Offshore India	333	300	333	300
	Email Server Migration (USD)	Non-Labor	Other General Expenses	Tools and accessories	EUR	Andrea Barnes	WS Materials	8,665	7,799	8,665	7,798
	Email Server Migration (USD)	Non-Labor	Other General Expenses	Miscellaneous Metal	USD	Andrew Kraft	WS Materials	10,000	0,000	10,000	0,000

General XLI Capabilities

Given the large number of lines in the Customer's financial summaries, the XLI was able to provide a faster and convenient method to update data. Along the same line, they were looking for a better UI for managing their Staffing Profiles. Lastly, the XLI was able to provide a faster ability to approve a large number of time sheets while viewing all their details.

THE IMPLEMENTATION

The implementation lasted several weeks with services delivered onsite and remotely. The XLI product was first installed and then set up with basic configurations before making changes to support the customer's unique needs. After several sessions between the customer's PPM team and the PPMetrics development team, the XLI core product was enhanced to support their unique use cases, e.g. multi-currency, expense owner security. As of the creation of this case study, six months have passed since the go-live and the XLI has been operating smoothly no critical issues or shutdowns.

THE ROAD AHEAD

Given their immediate success with the XLI, customer plans to expand its use in the near future. Along with an increase in users, they seek to broaden the XLI functionality including:

- XLI reporting
- Request management
- Time Submissions

