
Excel Interface (XLI) For Micro Focus

PPMetrics – Work Plan Management Configuration

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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 configuring the work plan management module of the XLI. It was written for:

- System and PPM instance administrators
- PPM technical support personnel

2. XLI Work Plan Management Overview

The goal of the XLI's work plan management functionality is to provide an alternative user interface for updating PPM work plan information, including PPM OOTB and custom fields. This module aligns with the PPM core system logic and does not typically require any changes to existing processes or PPM configurations.

3. XLI Work Plan Configuration Overview

At a high-level, the process of configuring the XLI work plan management module consists of the following steps:

1. Modifying field attributes through an XLI table to suit your organization's needs.
2. Configuring user data fields through an XLI table.
3. Configuring custom filters (please refer to the installation and administration guide).

4. Modifying Fields Attributes

The records in the table XL_ENT_FIELDS with ENTITY_ID = 2 contain the entire field configuration of the module. In order to better align the configuration of the module to your organization's needs, the following changes may be performed:

1. Modify field prompts using the CAPTION field.
2. Change field locations on the XLI using the LOCATION_SEQ field.
3. Update the default column widths of any desired fields using the COL_WIDTH column. Note that in order to hide a field completely, you would need to set its column width to "0".
4. When you are done making all these changes, open the table XL_ENTITIES with ENTITY_ID = 2 and increment the value of the field CONFIG_VERSION_NUM. In order to see your changes through XLI, you would need to re-open the WORK_PLAN worksheet (no need to re-open the entire workbook).

► **Do not make any other changes to the data in the XL_ENT_FIELDS table, other than those listed above or in the section below.**

5. Configuring User Data Fields

In order to configure work plan *user data* fields, based on your PPM configuration, insert a record for each such field to the XL_ENT_FIELDS table. The table below specifies the details of the record insertion procedure. When you are done making all these changes, open the table XL_ENTITIES with ENTITY_ID = 2 and increment the value of the field CONFIG_VERSION_NUM. In order to see your changes through XLI, you would need to re-open the WORK_PLAN worksheet (no need to re-open the entire workbook).

Field Name	Description	Data Type and Valid Values	Required	Default	Example
ENT_FIELD_ID	Unique identifier. Use any number unique to this column.	Number	Y		30122
ENTITY_ID	Use the value "1".	Number	Y		2
CAPTION	The field's caption.	Text (200)	Y		Health
FROM_SQL	The field's SQL column, used when the data is retrieved to the XLI. Use the alias UD to reference the PPM user data table.	Text (4000)	Y		ud.datum2_visible
DATA_SOURCE	The list of values, delimited by commas, behind fields which use a drop-down list as their component type.	Text (4000)	N		<i>Green, Yellow, Red</i>
DATA_TYPE	Determines whether the field is alphanumeric or numeric.	Text (8) ALPHA/NUMERIC	Y		ALPHA

DEFAULT_VALUE	Sets a default value for the field.	Text (4000)	N		
DISPLAY_ONLY_FLAG	Determines whether the field should be editable to the user.	Text (1) Y/N	N	N	N
MAX_LENGTH	Determines the maximum number of characters the field should support.	Number	Y		6
MULTI_FLAG	Use the value "N".	Text (1) Y/N	Y	N	N
POPUP_FLAG	Use the value "N".	Text (1) Y/N	Y	N	N
REQUIRED_FLAG	Determines whether the field should be mandatory to the user.	Text (1) Y/N	Y	N	N
COMPONENT_TYPE	Determines the type of control which should be used to populate this field. Use either 1 for free text or 2 for drop-downs.	NUMBER	Y		2
VALIDATION_FORMULA1	Serves the same purpose as the first fields at the bottom of Excel's data validation settings screen.	NUMBER	N		0 Another example: '=TODAY()'
VALIDATION_FORMULA2	Serves the same purpose as the second field at the bottom of Excel's data validation settings screen	NUMBER	N		1000
VALIDATION_OPERATOR	If the field needs to have a special Excel data validation, this field should be used and corresponds to "data" field in Excel's data validation settings screen. The valid numeric values are listed here: https://msdn.microsoft.com/en-us/library/office/ff840923.aspx	NUMBER	N		6
VALIDATION_ERR_MSG	Custom error message that is displayed to the user when the data validation fails. If left empty, the XLI uses Excel's default.	Text (400)	N		Please enter a value between 100 - 500
NUMBER_FORMAT	The way by which Excel should	Text (30)	N		m/d/yyyy = use to format date

	format the value. Must be a valid Excel number format				based on the user's locale
LOCATION_SEQ	Determines the location of the field in XLI. If left blank, the XLI displays fields based on their order in PPM.	NUMBER	N		1
COL_WIDTH	The default width of the Excel column used to display the field.	Number	Y	25	30
REFERENCE_CODE	Unique textual reference to the field. Use the string "UD" concatenated with the PPM user data column number.	Text (200)	Y		UD2

6. Security Model

The XLI inherits PPM's security model, regardless of whether it has been customized or not, and ensures that users may only perform the same data operations through the XLI as they can through the core PPM interface. The table below contains the exact criteria used by the XLI to determine which work plan records should be available for download.

Update Work Plan Information	
License	Project Management or Configuration
Access Grants	Must have one of the following grants: <ul style="list-style-type: none"> • Edit all Projects • Edit Projects (and be one of the project managers)
Project Status	<ul style="list-style-type: none"> • Cannot be set to be integrated with Microsoft project. • Must be associated with active requests. • Work plan must be in 'active' or 'in planning' statuses.