Excel Interface (XLI) for OpenText PPM

The Challenge: PPM users love Microsoft Excel's® interface for data analysis and entry, but struggle with rigid web forms and limited offline capabilities. Meanwhile, IT teams worry about data integrity when users export PPM data to spreadsheets.

The Solution: The Excel Interface (XLI) for OpenText Project and Portfolio Management™ from PPMetrics eliminates this dilemma. XLI loads PPM data directly into Excel, enabling real-time updates through Excel's familiar interface while fully honoring PPM's security, validation rules, and referential integrity.

Real Impact for Real Users: Whether you're a project manager managing multiple project work plans, a resource manager maintaining organizational capacity, or a finance professional reconciling timesheets against vendor invoices, XLI transforms tedious data entry into efficient Excel-powered workflows.

Beyond Individual Productivity: XLI enables mass updates across your entire PPM implementation and seamlessly integrates with external data sources through CSV and Excel-compatible formats—turning Excel into a powerful PPM command center without compromising enterprise governance.

BUSINESS BACKGROUND

- Launched in 2010 and continuously enhanced
- Used by top PPM customers worldwide
- Endorsed and supported by OpenText

FEATURES

- Retrieve, create, and update PPM objects individually or in bulk
- Leverage Excel's native interface and advanced capabilities
- Proprietary governance and control capabilities
- Maintain PPM security models and data integrity
- Integrate with external data sources seamlessly
- Generate Excel-based reports within the XLI environment

TECHNICAL DETAILS

- Zero end-user installation or configuration - download and use
- Compatible with PPM 9.x and later
- Minimal ongoing maintenance

BENEFITS

- **Increase productivity** with offline PPM data access and Excel's advanced capabilities
- **Enhance data quality** through Excel formulas, functions, and validations
- **Integrate** PPM data with external data sources
- **Improve decision making** with Excel's powerful analysis tools

Resource Management:
- Quick entry and maintenance of Staffing Profiles
- Resource Pool record management
- Line-level filtering and mass replacement tools

Financial Management:
- Reduce manual data entry with Excel formulas and calculations
- Create more accurate forecasts and actuals
- Simple integrations with other financial systems

Demand Management:
- Create, update, or delete any PPM request type
- Bulk operations while preserving field attributes
- Maintain required fields, rules, and security settings

Project Management:
- Manage multiple work plans simultaneously
- Cross-module integrations maintained
- Configurable to your Project Management maturity level

Time Management:
- Multi-timesheet creation and approval
- Inherits all time policies automatically
- Single-screen interface with shortcuts

ACCELERATE PPM PERFORMACE WITH EXCEL'S POWER

XLI delivers faster, more accurate PPM data management by combining Excel's familiar interface with enterprise-grade governance. Your team gains immediate productivity improvements while maintaining data integrity and seamless system integration. Transform your PPM experience—work smarter, not harder.

To learn more, visit **https://www.ppmetrics.com/xli** or email **info@ppmetrics.com**

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