Excel Interface (XLI)
For OpenText

PPMetrics – Request Management User Guide

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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 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 Demand 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.

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" worksheet, blank and unlocked, is 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.
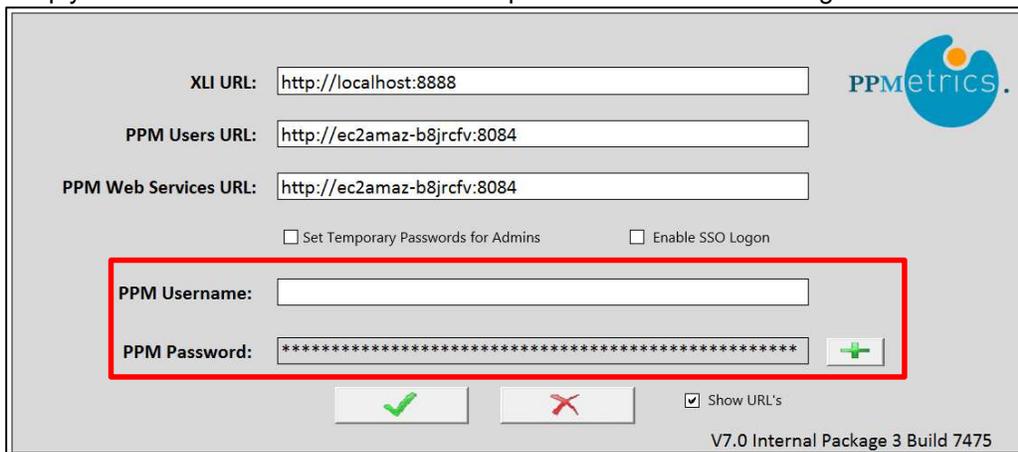
Fig. 4 PPM username and password are entered the first time the XLI is used

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.

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

8. Working with Requests

Request Type Configuration

The list below summarizes request type field attributes that get automatically detected and downloaded by the XLI (without any field-level or rules configuration):

1. All enabled request type fields are brought over, except for attachments, passwords, staffing profiles, and financial summaries. Hidden fields may or may not be brought over, depending on the value of the parameter "Download Hidden Request Type Fields" in the USER_SETTINGS tab.
2. Read-only PPM fields are made read-only in XLI as well
3. Character limit automatically set
4. Values of drop-down and auto-complete-list fields with list based validations are brought over.
5. Field change rules do not get automatically inherited by the XLI but PPM does trigger them when updates are sent back.

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The following field attributes and capabilities require XLI configuration:

1. Mandatory fields: Fields defined as mandatory are always made required when downloaded to the XLI, regardless of their request statuses.
2. Field Change Rules: When requests are updated or downloaded through XLI, PPM does fire field change rules but at times there is a need to trigger them locally in XLI.
3. UI Rules: When requests are updated or downloaded through XLI, field attributes at the request level may be set using XLI UI rules.
4. Default column widths
5. Special numbers/dates formats
6. SQL based drop downs and auto-complete-lists
7. Partial download of fields: It is sometimes desired to only download a subset of the request type fields to the XLI
8. Editable PPM fields that need to be made read-only in XLI
9. Specific order of processing fields as they are sent to PPM

10. Field validations not inherited by default (e.g. MIN/MAX values)

➤ Please refer to the XLI Request Management Configuration guide for additional information.

Accessing the Request Tab

Once a user opens the Request 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 requests that had previously been retrieved were updated by another user, in which case the user should hit "Refresh."

Data Retrieval

- The 'Search' or magnifying glass button is enabled by default. If the request ID is known, it may be entered into the text box, followed by a click on the 'Search' button.

Fig. 6 The 'Search' button allows searching by request ID(s) in the text box or other criteria.

- When the magnifying glass button is clicked, the requests search screen pops up and additional search criteria may be specified. When all the desired filter fields have been entered, clicking the 'Search' button retrieves all the matching requests that are updateable by the user based on the PPM security model. List of search fields:
  - Request Type – The specific request type of the requests
  - Creation Date From/To – Date range for when the requests were created
  - Description Contains – Search for a specific string within the description field of requests (label may be modified by administrators)
  - Request Fields / Table Components – Requests types that have table component(s) on them provide users with the ability to download data for any of these tables, separate from other request fields.
  - Custom Filters – After a Request Type has been specified, additional filters may appear here in this section if they have been configured by the administrator
- From the results, the user selects which of the requests to retrieve by clicking on single or multiple entities and then clicking 'Go.'
  - ➤ The XLI saves all the filters used. Therefore, subsequent loads of the search form for the same request type, even in a separate session, will automatically bring the last filters used.

Fig. 7 Requests basic search criteria.

Fig. 8 Sample Custom Filters based on Request Type search criteria.
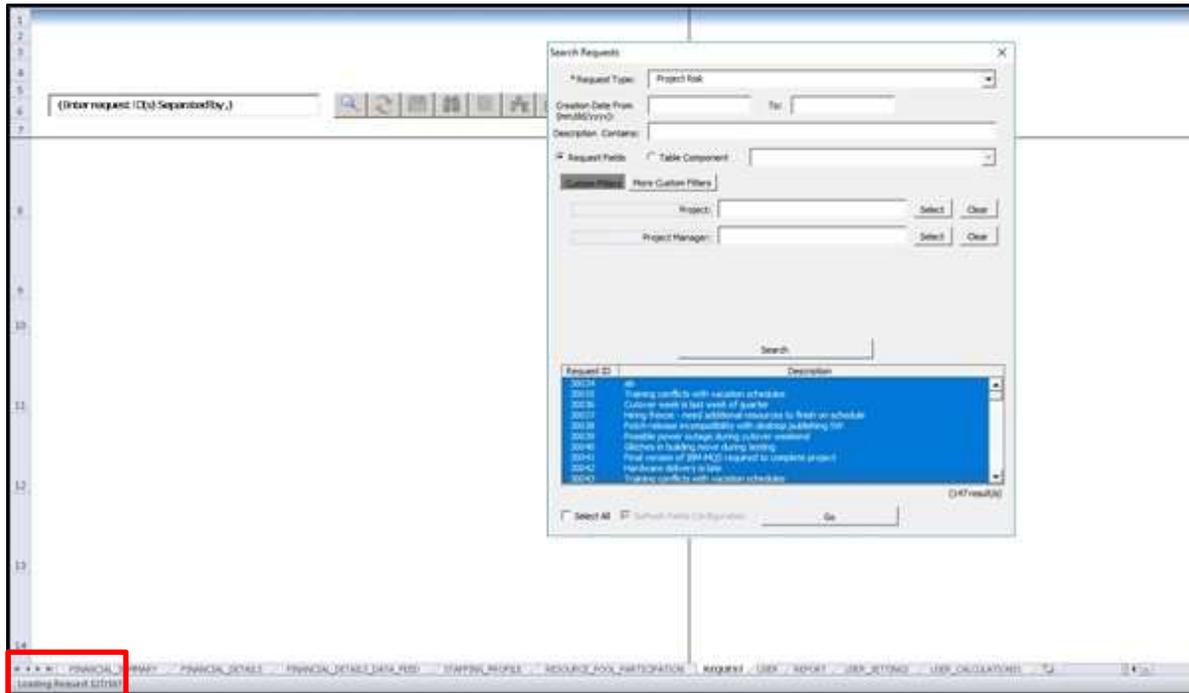
Fig. 9 Status bar displays number of requests being retrieved into the XLI.

> ➤ If another user has updated one or more of the retrieved requests within the last 30 minutes (or a different value, configurable by administrators), the XLI displays an appropriate warning message

Request Updates and Deletion

- Once the selected requests 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.

  - The first save operation in an XLI session tends to be substantially slower than subsequent ones.
  - Remember that the XLI honors the PPM security of the user and underlying Demand Management logic which helps dictate which fields are updateable.

- 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.
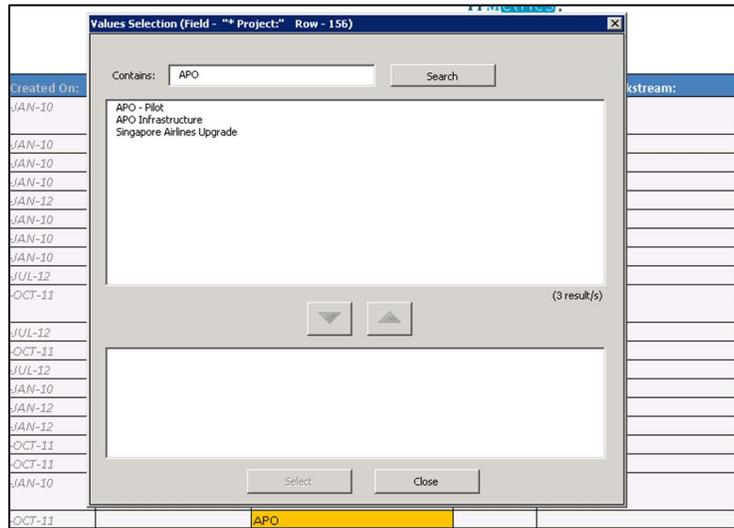
Fig. 10 Auto-complete List attempting to auto fill selection based on 'APO' entry.

- If configured as such, certain fields updates may trigger updates to other fields ("Field Change Rules") or modify their attributes ("UI Rules").

- Requests may or may not be available for deletion, depending on the PPM security model and XLI configuration. Requests valid for deletion have the cell under column "Delete (Y/N)" unlocked. In order to mark a request for deletion, type the letter "Y" under this column. Note that project records are never available for deletion or creation through the XLI.

- The default column/row widths may be manually adjusted by dragging the column/row borders, although it will not be preserved next time you download requests with the "Refresh Fields Configuration" option checked.

- Sorting in ascending or descending order is available for all the columns. To apply a sort, highlight 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.

Delete Request?

Values Replacement, to the right of the pick-list, sorting buttons, and navigator to/from table components to request fields

* Denotes required field (request level required fields are marked using red borders)

Project Risk

(Enter request ID(s) Separated by ,)

Delete (Y)	Request ID	Risk Status:	Created By:	Created On:	* Assigned To:	Escalation Level:	* Risk Impact Level:	* Probability:
	30036	New	Admin User	18-JAN-15	Mandy Rice (mrice)	Project	Low	Unlikely [0-40%]
	30037	New	Admin User	18-JAN-15	Mandy Rice (mrice)	Project	Medium	Likely [41-80%]
	30038	New	Admin User	18-JAN-15	Mandy Rice (mrice)	Project	High	Unlikely [0-40%]
	30039	New	Admin User	18-JAN-15	Mandy Rice (mrice)	Project	Medium	Likely [41-80%]
	30040	New	Admin User	18-JAN-15	Mandy Rice (mrice)	Project	Medium	Unlikely [0-40%]
	30041	New	Admin User	18-JAN-15	Mandy Rice (mrice)	Project	Medium	Unlikely [0-40%]

Fig. 11 Results screen with requests retrieved.

Request ID serves as link to PPM

Request Creation

- New requests can be created directly from the requests results screen:
  - Go to the row after the last retrieved row of data.
  - Enter in data for required fields and any other optional fields.
  - Continue adding as many rows of request data as needed.
  - Click the 'Save' button and after the XLI completes the operation, newly generated request ID(s) will be returned.
  - Note that project records may not be created through the XLI
- XLI provides a feature to easily copy single or multiple request lines:
  - From the left side of XLI, click on the row or rows (contiguous or not).
  - XLI will display a 'Record Actions' form. Click on the left most button.

Fig. 12 XLI showing the 'Record Actions' form. The left most button initiates the copy.

- If the administrator has configured a request type to be available for creation only, when using the 'Search Requests' screen, the Search button and all filter fields will be disabled and the user can directly go to the results screen to create requests:

Fig. 13 The 'Search' button is disabled for this Create-only request type.

- o Go to an empty row and enter in data for required fields and any other optional fields.
- o Continue adding as many rows of request data as needed.
- o Click the 'Save' button and after the XLI completes the operation, newly generated request ID(s) will be returned.

Fig. 14 The initial results screen for a Create-only request type. Note the Delete column label has been replaced with an Ignore label

Record Actions

The 'Record Actions' form mentioned earlier in the context of request creation, may also be used to initiate a set of collaborative and advanced data management features:

- Adding a private or public note to the request. Private notes are only visible to their creators, on column A of the request's row, whereas public comments are visible to all users.
- Highlighting the request in a specific color, which is visible to the user who defined it only.
- Creating a Microsoft Outlook email, task, or appointment from the request, while passing request data to these items.

PowerPoint Generation

Optionally, the XLI may be configured to allow users to generate PowerPoint decks for a single request of a chosen type. If this feature has been enabled, highlight any single cell on the request row of the type which has been enabled for this feature, then click on the PowerPoint generation button .