
Excel Interface (XLI) For OpenText PPM

PPMetrics – Resource Management User Guide

Document Version: 5.8
Document Release Date: February 2026



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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 Resource 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.

	Delete (Y/N)	* Staffing Profile Name	* Role	* Position Label	Resource Type	Reso
16					Bcard Asia & Africa BA4 Permanent	
17		ACME Company Intranet	Business Analyst	Business Analyst	Tech	GIS Consultants
18		ACME Company Intranet	CIO	D	BAGL Asia & Africa BA1 SI Partner	QA Commercial
19		ACME Company Intranet	Architekt - Applikationen	Architekt - Applikationen	BAGL Asia & Africa BA1 SI Partner	GIS Consultants

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.

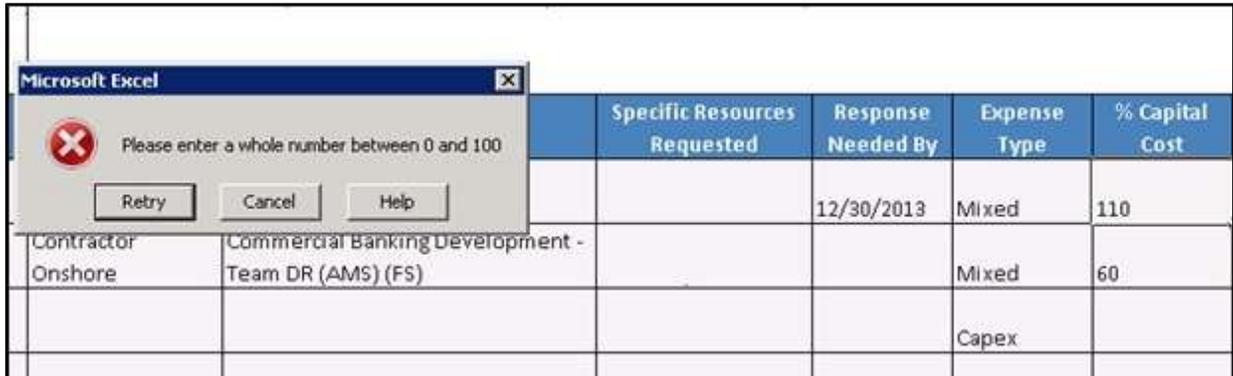


Fig. 3 Example of XLI native error handling.

- The “USER_CALCULATIONS(1-3)” worksheets, blank and unlocked, are 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.

XLI URL:

PPM Users URL:

PPM Web Services URL:

Set Temporary Passwords for Admins Enable SSO Logon

PPM Username:

PPM Password:

Show URL's

V7.0 Internal Package 3 Build 7475

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

8. Working with Staffing Profiles

Once a user opens the Staffing Profile 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 staffing profiles that had previously been retrieved were updated by another user, in which case the user should hit "Refresh."

Data Retrieval

- The different slicers, i.e. Entity Type, Previous Years, etc. on top of the worksheet require the user to make selections in order to query for the correct staffing profiles to retrieve and display them as desired. The asterisk (*) next to some of the slicers indicate that a selection is required. Note that only the "Display Fields" slicer is not required. It is also the only slicer that allows for multiple selections.
 - Entity Type: Specifies the type of staffing profiles to retrieve – Asset, Freestanding, Project, Proposal, or Org Unit
 - From Year: Specifies the starting year from which to display data
 - To Year: Specifies the ending year through which to display data
 - Time Period: Specifies which unit of time to use to display the data – Weeks, Months, Quarters or Years
 - Display Figures in: Specifies which units of effort to display resource information – Full Time Equivalent (FTE), Hours or Person Days
 - Incl. Allocations: Specifies whether or not to show resource allocation information – Yes or No
 - Calendar: Specifies whether to use the Fiscal calendar specified in the XLI or standard Gregorian calendar. If the XLI has been configured to use PPM's custom calendar, this slicer is hidden.
 - Display Fields: Optionally, the user can specify whether or not to display Financial Fields, Resource Fields, User Data or Comments. If User Data is specified but no user data is being shown, the user should contact their PPM admin.

Only “Display Fields” allow multiple selections. Note that if a certain group of fields aren’t displayed then their values will not change when updates are sent to PPM.

- Display Cost: If configured as such, the XLI will optionally allow the user to view costs for each position based on cost rules set up in PPM, including row totals. Costs can be shown in the base currency of the project or local currency of the staffing profile line.
- Once slicers and their options have been selected, the ‘Search’ button becomes enabled. If a single staffing profile needs to be retrieved and part of its name or associated entity’s ID are known, it may be entered into the text box, followed by a click on the magnifying glass button.

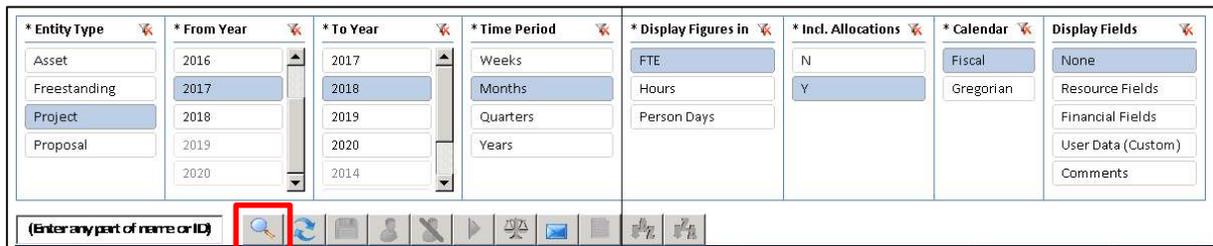


Fig. 6 Once slicers and their options have been selected, the ‘Search’ button becomes enabled.

- When the magnifying glass button is clicked, the staffing profile search screen pops up and additional search criteria may be specified. Searching by standard filters and/or custom filters (if configured by the XLI) is available by clicking the respective buttons. When all the desired filter fields have been entered, clicking the ‘Search’ button retrieves all the matching staffing profiles. List of standard search fields:
 - Name Contains – Any part of the staffing profile name
 - In Planning – Checkbox for staffing profiles in ‘In Planning’ status
 - Active – Checkbox for staffing profiles in ‘Active status
 - Assignment Balance – Checkbox for staffing profiles containing positions with a demand balance
 - Resource Category – Category of resource specified on staffing profile positions of staffing profile
 - Business Unit – The business unit associated with the staffing profile’s entity
 - Portfolio – The portfolio which the staffing profile’s linked entity belongs to
 - Role(s) – Role(s) being utilized on staffing profile positions of staffing profile. Note that when the role(s) filter is used, only staffing profile positions linked to the chosen role(s) are displayed, versus the entire staffing profile
 - Managed by me – Checkbox to filter for staffing profiles managed by logged in XLI user
 - Assigned Resource(s) – Name(s) of a resource(s) assigned to one or more positions in the staffing profile. Note that when the assigned resource filter is used, only staffing profile positions assigned to the chosen resource(s) are displayed, versus the entire staffing profile
 - Contains Requests to Pool(s) – Name(s) of one more resource pool(s) which the staffing profile references. When this filter is used, one or more position statuses must be checked for selection (below the filter). Note that when this filter is used, only staffing profile positions linked to the chosen pools are retrieved, versus the entire staffing profile
- From the results, the user:
 - Selects which of the staffing profiles to retrieve by clicking on single or multiple entities or ‘Select All’

- Afterwards, the user then selects which of the staffing profile positions to retrieve based on previously staffing profile(s) selection by clicking on single or multiple lines or 'Select All' and then clicking 'Go'. If staffing profile(s) are selected without selecting any of their position(s) then hitting the 'Go' button will cause these profiles to be downloaded in a "creation only mode" (useful if no updates need to be made to existing positions, but only new ones need to be created).
- The 'Hide Blank Periods Post Download' option will automatically hide all the first blank period columns of the data table, e.g. months without FTE. This results in less scrolling for the user and more convenient updating.
- The 'Auto Fix Over-Allocations' option may be enabled as well, depending on whether the setting 'Enable Fixing of Staffing Profile Over-Allocations' has been turned on. When checked, and assuming the 'Display Allocations' slicer option has been selected, the XLI will reduce assignment cells representing over-allocations, even if the active user is not the pool manager of these assignments. In situations where more than one resource has been assigned to the position, the XLI will reduce the assignment values of all the assigned resources, proportionate to their pre-update assignments. Editable assignment cells affected by the fix are highlighted in orange, whereas for non-editable cells only column A is highlighted.

The screenshot shows the 'Search Staffing Profiles (Projects)' window. At the top, there are search filters including 'Name Contains', 'Managed by me', 'In Planning', 'Active', and 'Assignment Balance'. Below these are 'Standard Filters' and 'Custom Filters' tabs. The 'Standard Filters' section includes 'Resource Category', 'Business Unit', 'Portfolio', 'Roles(s)', and 'Assigned Resource(s)'. The 'Roles(s)' field is populated with 'Business Relationship Manager (#3000-0)'. The 'Assigned Resource(s)' field is empty. There are 'Select' and 'Clear' buttons for both roles and assigned resources. Below the filters are checkboxes for 'Contains Requests to Pool(s)', 'All Statuses', 'New', 'Requested', 'Partially Assigned', 'Soft Booked', 'Fulfilled', and 'Rejected'. A 'Search' button and a 'Create/Update Headers' button are also present. The 'Staffing Profiles' table has columns: Request ID, Staffing Profile Name, Capex Enabled, Status, Start Period, and End Period. The 'Positions' table has columns: Staffing Profile Name, Role, Label, Resource Pool, and Assignees. At the bottom, there are checkboxes for 'Select All', 'Hide First Blank Periods', and 'Auto Fix Over-Allocations', followed by a 'Go' button and a '(17 position/s)' indicator.

Fig. 7 Search results based on slicer selection criteria.

* Entity Type		* From Year	* To Year	* Time Period	* Display Figures in	* Incl. Allocations	* Calendar	Display Fields
Asset		2016	2017	Weeks	FTE	N	Fiscal	None
Freestanding		2017	2018	Months	Hours	Y	Gregorian	Resource Fields
Project		2018	2019	Quarters	Person Days			Financial Fields
Proposal		2019	2020	Years				User Data (Custom)
		2020	2014					Comments

Delete (Y)	* Staffing Profile Name	* Role	* Position Label	Status	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17
	AA - Demo Project	Developer - SAP	AAA	Fulfilled	1.19	1.19	1.19	4.00	4.00	4.00	4.00	4.00	4.00	4.00
			Brian Murph	Committed	1.23	1.23	1.23	4.00	4.00	4.00	4.00	4.00	4.00	4.00
			Promise	Committed	1.19	1.19	1.19	4.00	4.00	4.00	4.00	4.00	4.00	4.00
			Demand Balance		-1.23	-1.23	-1.23	-4.00	-4.00	-4.00	-4.00	-4.00	-4.00	-4.00
	AA - Demo Project	Business Relationship Manager	HHH	New	1.12	1.12	0.10	0.25	0.25	0.25	0.25	0.25	0.25	0.25
			Demand Balance		1.12	1.12	0.10	0.25	0.25	0.25	0.25	0.25	0.25	0.25
	AA - Demo Project	Business Relationship Manager	HHH	Soft Booked	0.67	0.67	0.10	0.25	0.25	0.25	0.25	0.25	0.25	0.25
			Promise	Committed	0.19	0.19	0.19							
			Promise	Soft Booked	0.28	0.28	0.28							
			Demand Balance		0.21	0.21	-0.37	0.25	0.25	0.25	0.25	0.25	0.25	0.25
	AA - Demo Project	Architect	HHH	Soft Booked	1.51	1.51	2.00	1.00	1.00	1.00	1.00	1.00	1.15	1.15
			Brian Murph	Soft Booked	1.25	1.25	1.25	1.29	1.29	1.29	1.29	1.29	1.29	1.29
			Abe Vernon	Committed	0.26	0.26								
			Demand Balance		0.00	0.00	0.75	-0.29	-0.29	-0.29	-0.29	-0.29	-0.15	-0.15
	AA - Demo Project	Architect	HHH	Soft Booked	2.60	2.60	0.10	0.25	0.25	0.25	0.25	0.25	0.25	0.25
			Brian Murph	Soft Booked	0.09	0.09	0.09							
			Promise	Soft Booked	0.50	0.50	0.50							
			Promise	Soft Booked	0.23	0.23	0.23							
			Demand Balance		1.77	1.77	-0.73	0.25	0.25	0.25	0.25	0.25	0.25	0.25
	AA - Demo Project	CIO	HHH	New	2.07	2.07	0.10	1.08	1.08	1.08	1.08	1.08	1.08	1.08

Loading Staffing Profile 1/1 Position 27/139

Fig. 8 Status bar displays number of staffing profiles being retrieved into the XLI.

- ▶ If another user has updated one or more of the retrieved staffing profiles within the last 30 minutes (or a different value, configurable by administrators), the XLI displays an appropriate warning message.

Creation and Updates to Headers of Staffing Profiles

- The XLI further allows authorized users to create staffing profiles for active entities that do not already have staffing profiles linked to them, or modify header information of existing ones.
- In order to create/update staffing profile headers, click on the “Create/Update Header” button on the search screen (see Fig 7 above).
- The staffing profile creation screen allows the XLI user to create or update headers of one or more staffing profiles in a single operation. In order to do that, first hit “Search” button to retrieve the desired entities, then click on each item and fill out its required fields below.
- If one or more staffing profiles are selected in the search screen then clicking on the “Create/Update Header” button, will retrieve the same highlighted staffing profiles.
- When you are done, click the “Execute” button. The XLI will inform you of the results of the operation at the end of the process. If you return to the search screen you will automatically see all the entities for which you have created staffing profiles added to the result set.
- PPM logic surrounding creation or updates to staffing profile header is inherited by the XLI.
- ▶ Due to a system limitation of the core PPM system, proposals must have a “Planned Start Period” filled out in order to be able to create staffing profiles for them.

Request ID & Name	Staffing Profile Name	Region	Manager(s)	Start Period	End Period	Work Load	Work Load Category	Header Exists	Status
35896 AB Processing System	AA - Demo Project	Germany	Admin User; Jerry Young	March 2016	October 2016	Y		Y	Active
30608 ACME Email Server Migration	ACME Email Server Migration	North America	Alexander Schneider	March 2010	October 2016	Y	Strategic Projects	Y	In Planning
31661 AP Web Interface	AP Web Interface	North America	Joseph Banks; Ann Baxb	June 2012	December 2016	Y	Strategic Projects	Y	In Planning
30632 APO - Pilot	APO - Pilot	North America	Joseph Banks	October 2011	February 2012	Y		Y	Active
33916 APO Infrastructure	APO Infrastructure	Germany	Admin User; Joseph Barl	June 2011	October 2011	N	Strategic Projects	Y	In Planning
30630 APO	ACME Company Intranet	North America	Admin User; Jay Bellay	March 2010	September 2016	Y	Strategic Projects	Y	In Planning
30991 Barcode Asset Collection	Barcode Asset Collection Project 5	North America	Joseph Banks	July 2010	May 2011	Y	Strategic Projects	Y	In Planning
31357 Bill Pay - QA Testing Project	Bill Pay - QA Testing Project	UK	Mary River	January 2012	March 2012	Y	Strategic Projects	Y	Active
31356 Bill Pay Application	Bill Pay & App>lic>ation	UK	Jack Foster	August 2012	October 2012	Y	Strategic Projects	Y	Active
30633 Billing Systems &sdfl's>d' In tegration	Billing Systems Integration Project	North America	Joseph Banks	January 2012	September 2012	Y		Y	Active
31781 Billing Upgrade	Billing Upgrade	Germany	Joseph Banks	October 2011	August 2015	Y	Strategic Projects	Y	In Planning
30711 Business Unit & Integration	Business Unit & Integration	North America	Joseph Banks	February 2012		N	Strategic Projects	N	
30047 CBA Play Session	CBA Play Session	North America	Admin User; Clark Kent	January 2016		Y		N	
30631 CRM One World	CRM One World	North America	Joseph Banks	July 2012	March 2013	Y	Strategic Projects	Y	In Planning
30840 Call Center Upgrade	Call Center Upgrade	North America	Nicole Smith	January 2012	July 2013	Y	Strategic Projects	Y	In Planning
32386 Commerce Center 6.0	Commerce Center 6.0	North America	Jack Foster	March 2012	April 2012	Y	Strategic Projects	Y	Active
32387 Commerce Center 6.0 - QA Testing Prc	Commerce Center 6.0 - QA Testin	North America	Mary River; Jack Foster	April 2012	November 2012	Y	Strategic Projects	Y	In Planning
33002 Data Mining Expansion	Data Mining Expansion	North America	Nicole Smith	November 2012	April 2014	Y	Strategic Projects	Y	In Planning
34698 Delphix Implementation	Delphix Implementation	North America	Admin User	January 2014	February 2014	Y	Strategic Projects	Y	In Planning

(first 1000 results)

* Staffing Profile Name: ACME Company Intranet * Region: North America * Work Load Category: Strategic Projects

Work Load * Start Period: March 2010 * End Period: September 2016 * Status: In Planning

Execute Close

Fig. 9 Update Staffing Profile Header Screen.

Updates

- Once the selected staffing profiles have 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.
- Remember that the XLI honors the PPM security of the user and underlying Resource Management logic which dictates which fields are updateable.

Staffing Profile name serves as link to PPM

Delete SP Line?

* denotes required field

Sorting is available

Entity Type	* From Year	* To Year	* Time Period	* Display Figures in	* Int. Locations	* Calendar	Display Fields
Asset	2016	2016	Weeks	FTE		Fiscal	None
Res. Standing	2017	2017	Months	Hours		Gregorian	Resource Fields
Project	2018	2018	Quarters	Person Days			Financial Fields
Proposal	2019	2019	Years				User Data (Custom)
	2020	2020					Comments

(Enter any part of name or ID)

Delete (Y)	* Staffing Profile Name	* Role	* Position Label	Resource Type	Resource Pool	Specific Resources Requested	Response Needed By	Expense Type	% Capital Cost	Cost Category	Status	Jan-16	Feb-16	Ma
	ACME Company Intranet	Architect	Architect 2	BAGL Asia & Africa Assistant VP Permanent Non Tech	Offshore: Trial(UnNamed) Current Year	Alex Smith; Andy Wilson; Alexander Schneider	2/16/2017	Capex		Contractor	Partially Assigned	11.00	11.00	1
	ACME Company Intranet	Architect	Architect 5	BAGL Asia & Africa BA1 SI Partner Tech	QA Commercial Banking (FS)		5/14/2016	Opex		Employee	New	2.00	3.00	
	ACME Company Intranet	Architekt - Applikationen	Applikationen	BAGL Asia & Africa BA1 SI Partner Tech	Application Quality Management			Capex			New	2.00	2.00	
	ACME Company Intranet	Business Analyst	Business Analyst	BAGL Asia & Africa BA1 SI Partner Tech	Global	Andy Madison	12/31/2016	Mixed	3	Contractor	Soft Booked	2.00	0.50	
	ACME Company Intranet	Business Analyst	Business Analyst	BAGL Asia & Africa BA1 SI Partner Tech	QA Commercial Banking (FS)	Alex Richter		Capex			Requested	1.00	0.50	
	ACME Company Intranet	Business User	Business User	BAGL Asia & Africa BA1 SI Partner Tech	On-line Banking Development - Team 1 (AMS) (FS)			Capex			Requested	1.00	1.01	
	ACME Company Intranet	Business User	Business User	Agency Staff 2				Capex			New	0.50	0.50	

Visual indicators of updated line(s)/field(s)

Fig. 10 Results screen with staffing profile lines retrieved.

- ▶ Through an admin setting, it is feasible to allow staffing profile users to update the "notes" field of forecast lines, even if they don't have the ability to update other forecast fields. This allows demand creators and resource pool managers to use this field to communicate.
- Sending Resource Requests:
 - The  'Send Resource Requests' button is enabled whenever staffing profile(s) have been downloaded to the XLI, enabling users to send eligible staffing profile positions to their resource pools for all the downloaded profiles at once.
 - If the button is clicked before changes have been saved, the XLI first performs a save operation.
 - If there are any positions eligible to be sent, the XLI displays the "Send Resource Requests" pop-up form, from which the user can choose which position(s) to send.
 - Once the form is closed, the XLI automatically refreshes the screen, provided that at least one position has been sent.
- ▶ Note that this capability is only available on PPM version 9.3 and higher

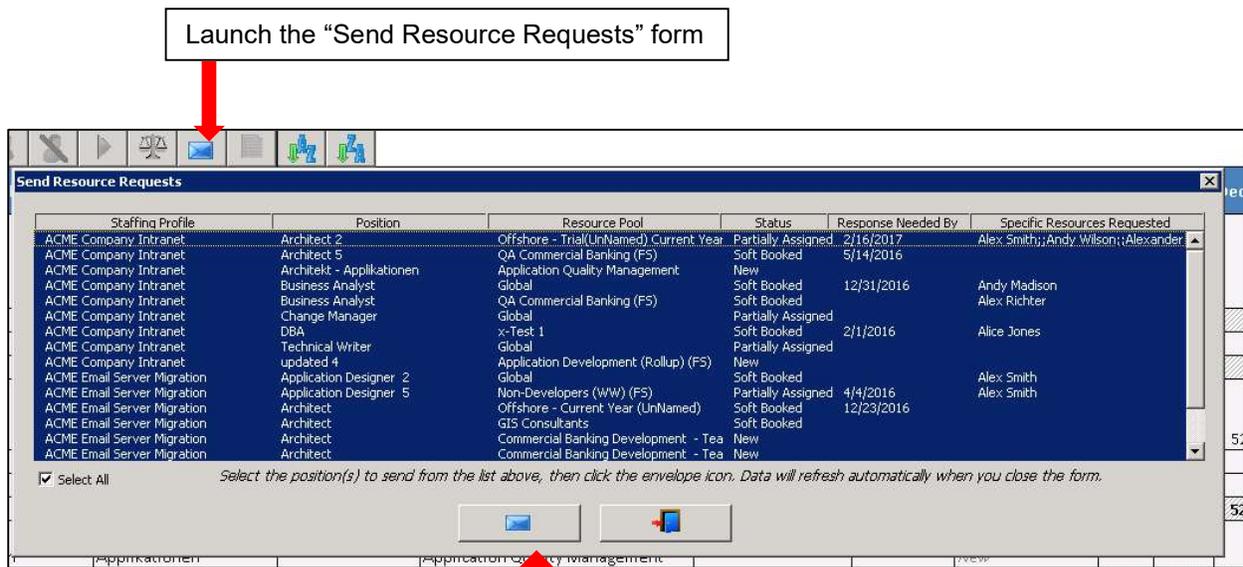


Fig. 11 'Send Resource Requests' form.

- Emailing Resource Pool Manager:
 - When a single Resource Pool is selected and the  'Send Resource Requests' button is clicked, the XLI will prompt if the user would like to email the resource pool manager of the highlighted pool. If 'Yes' is selected, the user's default email program is launched with the recipient prepopulated with the resource pool manager's email.

- If 'No' is selected then the standard XLI 'Send Resource Requests' form is displayed.

* Role	* Position Label	Resource Pool	Status	Oct-17	Nov-17	Dec-17	Jan-18	Feb-18	Mar-18	Apr-18	May-18
Application Designer	Application Designer		New								
	Unmet Demand									0.00	0.00
Architect	Architect	Global	ft Booked								
	Amir Khan		Soft Booked								
	Andy Madison		Committed								
	Unmet Demand									0.00	0.00
Business Analyst	Business Analyst	Global	Partially Assigned								
	Anapat Wong		Committed							1.00	1.00
	Unmet Demand									-1.00	-1.00
Change Manager	Change Manager	Global	Partially Assigned								
	Anapat Wong		Committed								
	Unmet Demand							0.00	0.00	0.00	0.00
Developer - Application	Developer - Application	Global	New						1.00		
	Unmet Demand							0.00	1.00	0.00	0.00
Developer - Database	Developer - Database	Global	Partially Assigned								

Fig. 12 Prompt to email resource pool manager.

- Forwarding Resource Requests:
 - The 'Forward Resource Request' button is enabled whenever a staffing profile position line has been selected where a Resource Pool managed by the active user has been specified.
 - When the button is clicked, the XLI displays the 'Forward Position' pop-up form allowing the user to select a different Resource Pool to forward requests to.
 - Once a selection is made and confirmed, the XLI automatically refreshes the screen, updating the Resource Pool information on the screen.

* Position Label	Status
Architect 2	Partially Assigned
Ayako Yoshida	Committed
Alexander Schneider	Committed
Demand Balance	
Architect 5	Soft Booked

Fig. 13 'Forward Position' form.

- Resource assignments:
 - The 'Resource' and 'Delete' buttons are enabled based on different scenarios.
 - When a user stands on 'Specific Resource Requested' field the resource button is used for specifying the specific resource. If there already is a 'Specific Resource Requested' value the delete button next to it for deleting resource is enabled as well.

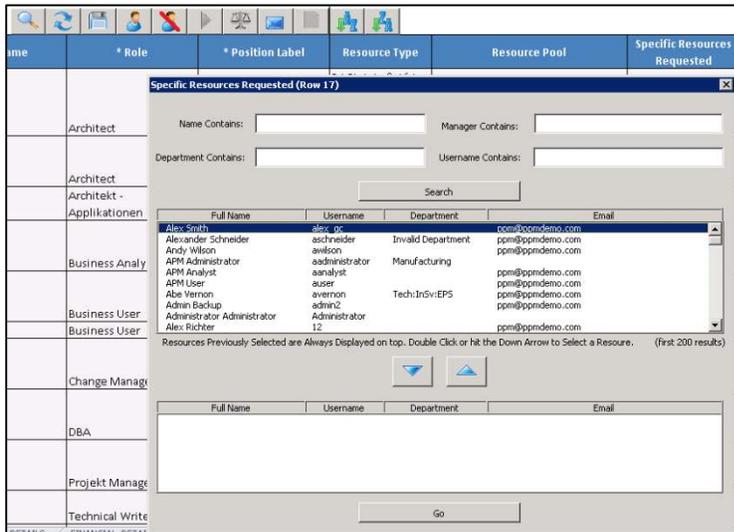


Fig. 14 'Specific Resources Requested' field is active and the 'Resource' button allows us to search resources. Note that the 'Delete' button is also enabled.

- In addition to the 'Resource' button , The 'Specific Resource Requested' field allows manual entry of data for one or more positions at once. If more than one value needs to be entered, a semi-colon should be used as the delimiter. For each such value, any part of the user's user name or full name may be typed. When the XLI finds a unique match, it auto-fills it, otherwise it presents the search form to the user. This capability is also supported for updates made to multiple rows at once

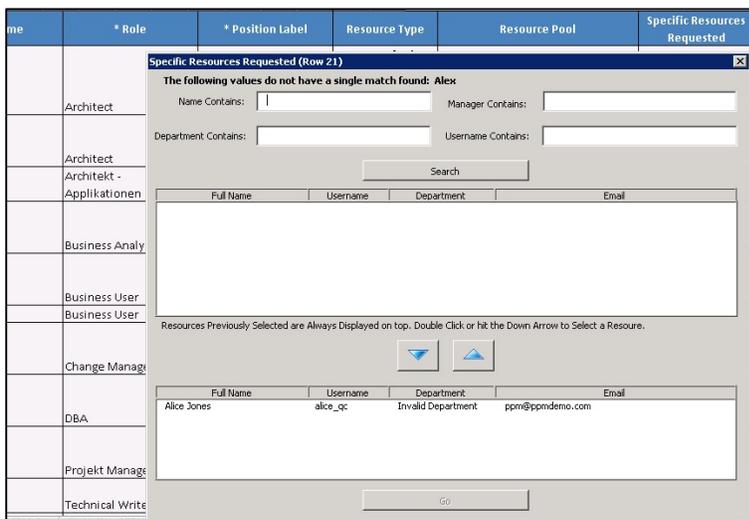


Fig. 15 'Alice; Alex' was manually entered into the 'Specific Resources Requested' field. One match (Alice) was found and the other (Alex) was not so Search screen is presented.

- The 'Resource' button  is also used for resource assignments (one or more positions at once) and is enabled if the following criteria are met for all the positions selected:
 - Display Allocations slicer = "Y".

- The user highlights a single cell on each of the forecast line (any column other than 'Specific Resource Requested').
- The user is allowed to assign resources to the position, as a manager of the position's Resource Pool.
- The position's required fields have been filled out (including user data fields).

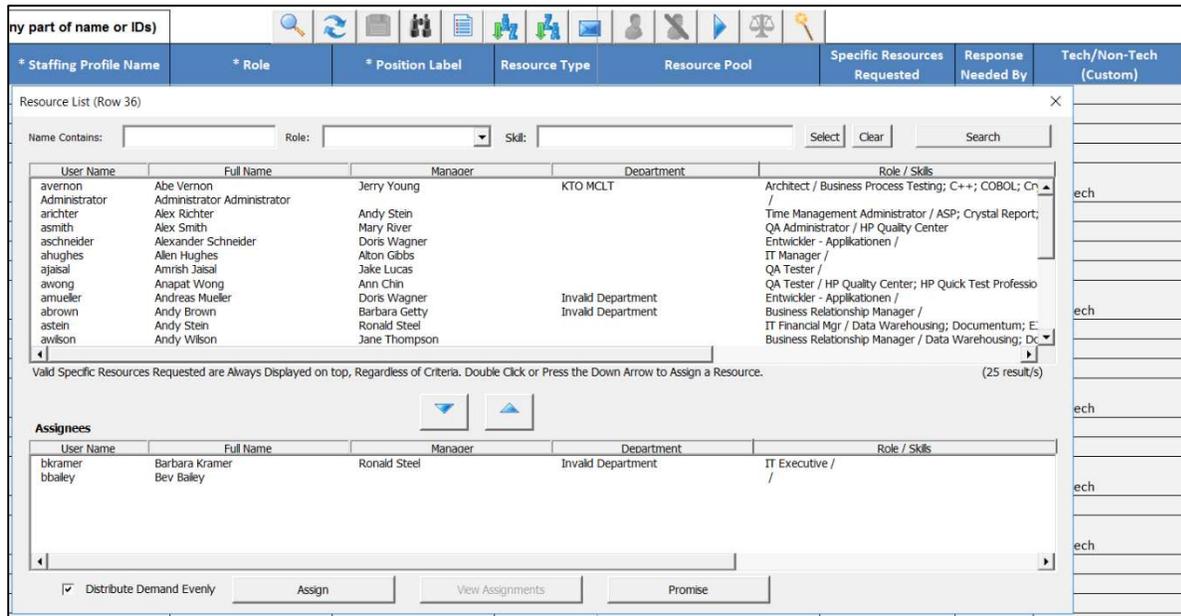


Fig. 16 'Resource' button allows us to select resources from specified resource pool to assign to the position.

- If specific resource(s) have been requested, and are eligible for assignment, they appear at the top of the search results.
 - Efforts of resources already assigned to positions, may or may not be updateable depending on the Resource Management logic.
 - If a certain administrative setting has been enabled and the position(s) have specific resource(s) requested, you may be asked by the XLI whether to automatically assign those resources without seeing the assignment screen at all.
- As resources are selected, XLI automatically book resources based on their available capacity when making assignments, meaning whatever minimum available capacity will be applied to the unmet demand.
- Clicking on "View Assignments" button shows the chosen resource's assignments for the next six months and their current resource pool participation.
 - Clicking on the resource name after they've been assigned will also show their assignments for the next six months and their current resource pool participation.
 - When the assignments information is displayed in FTE units, the resource capacity is taken into account as well (FTE > 1 suggests over-utilization).
 - Clicking the "Distribute Demand Evenly" checkbox allows the XLI to spread the forecasted demand for the position evenly across the resources the user wishes to assign.

Resource Assignments and Participation										
Assignments										
Resource Name	Entity Type	Entity Name	Status	05/16	06/16	07/16	08/16	09/16	10/16	
Abe Vernon (Avernor)	Protect	Atlas	Soft Booked	1	1	1				

Note: FTE information is calculated based on the resource's capacity. Total FTE > 1 = Overallocation

Resource Pool Participation	
Resource Pool	Current Participation
x-Test 1	80%
Global	10%
Offshore Partner A (FS)	10%

Fig. 17 Clicking on resource shows their future assignments and resource pool participation.

- Clicking on “Promise” button will prompt the XLI to enter a promised allocation line to the staffing profile position and in addition, the XLI will automatically allocate any remaining time needed to fill the position’s forecasted effort.

Delete (Y)	* Staffing Profile Name	* Role	* Position Label	Resource Type	Resource Pool	Specific Resources Requested	Response Needed By	Expense Type	% Capital Cost	Cost Category	Status	Jan-16	Feb-16	Mar-16	Apr-16	May-16
	ACME Company Intranet	Architect	Architect 5	BAGL Asia & Africa BA1 SI Partner	QA Commercial Banking (FS)		5/14/2016	Opex		Employee	Soft Booked	2.00	2.00	2.00	2.00	2.00
			Shella Steffen								Soft Booked	1.00	1.00	1.00	1.00	1.00
			Lillian Freda								Committed		1.00	0.50	0.40	0.36
			Promise								Soft Booked	1.00		0.50	0.60	0.64
			Demand Balance									0.00	0.00	0.00	0.00	0.00

Fig. 18 Promised allocation line added to current working resource assignment line.

- Resource balancer:
 - The  ‘Resource balancer’ button is enabled when user highlights a single cell of single assigned resource per position which the user is allowed to update (any column in the result table will work, other than ‘specific resources requested’).
 - Selection of multiple rows is allowed, provided that each one of them meets the original criteria specified above.
 - When user clicks the  ‘Resource balancer’ button, the XLI loops through all the position’s periods and for each position that has an unmet demand different than zero, it sets the resource’s assignment to a positive figure that will bring the unmet demand to zero.
 - If the administrative setting ‘Enable Fixing of Staffing Profile Over-Allocations’ has been enabled, the scale button will also be enabled for assignment rows which the active XLI user is not allowed to update but will only address over-allocations (never increase the assignments).

Delete (Y)	* Staffing Profile Name	* Role	* Position Label	Resource Type	Resource Pool	Specific Resources Requested	Response Needed By	Expense Type	% Capital Cost	Cost Category	Status	Jan-16	Feb-16	Mar-16	Apr-16	May-16
			Demand Balance									2.00	2.00	2.00	2.00	2.00
	ACME Company Intranet	Business Analyst	Business Analyst	BAGL Asia & Africa BA1 SI Partner	QA Commercial Banking (FS)	Alex Richter		Mixed	100		Soft Booked	1.00	1.00	2.56	2.21	
			Lillian Freda								Soft Booked	1.00	0.50	2.06	1.71	
			Ingrid Borja								Soft Booked		0.50	0.50	0.50	
			Demand Balance									0.00	0.00	0.00	0.00	0.00

Fig. 19 Resource balancer sets specified resource’s assignments to fulfill unmet demand for the position.

- Group selection:
 - If the 'Include Allocations' slicer option was selected, the  'Group Selection' button becomes enabled after the result set is downloaded into the XLI. This capability enables users to complete their work faster by having the XLI scan the downloaded result set and select the records of interest given the task at hand. When the user clicks this button, a pop-up appears, allowing for the selection of multiple rows within the data set that meet the pre-defined criteria:
 - Under-Allocated Positions – Only applies to the visible timeline and to positions which the active XLI user can update their allocations.
 - Over-Allocated Positions – Only applies to the visible timeline and to positions which the active XLI user can update their allocations.
 - Under and Over-Allocated Positions – Only applies to the visible timeline and to positions which the active XLI user can update their allocations.
 - Assignable Positions with Specific Resource(s) Requested – Only applies to positions which are assignable by the active user and have their 'Specific Resource(s) Requested' field filled out.

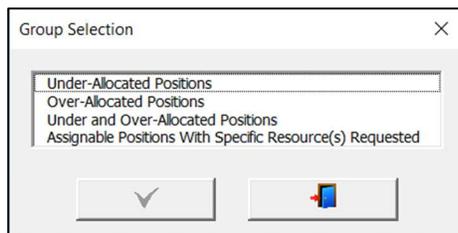


Fig. 20 Pop-up of criteria for Group selection.

- Once a single selection is made, the user clicks the 'Submit'  button to have the XLI highlight the rows or positions that match the criteria.
- From there, the user may manually make updates in the cells or use automated features available within the XLI.

Additional Features

- XLI provides a feature to easily copy single or multiple forecast lines:
 - From the left side of XLI, click on the row or rows (contiguous or not).
 - XLI will prompt user with the question 'Copy Forecast Lines?'
 - If 'Yes', the XLI will paste the copied lines to the bottom of the last retrieved row of data.

Delete (Y)	* Staffing Profile Name	* Role	* Position Label	Resource Type	Resource Pool	Specific Resources Requested	Response Needed By	Expense Type	% Capital Cost
	ACME Company Intranet	Business User	Business User	BAGL Asia & Africa BA1 SI Partner	On-line Banki Team 1 (AMS)			Capex	
	ACME Company Intranet	Business User	Business User	Agency Staff 2				Capex	
	ACME Company Intranet	Change Manager	Change Manager	BAGL Asia & Africa BA1 SI Partner	Global			Capex	
	ACME Company Intranet	DBA	DBA	BAGL Asia & Africa BA1 SI Partner	x-Test 1	Alice Jones	2/1/2016	Mixed	60
	ACME Company Intranet	Projekt Manager	Projekt Manager	BAGL Asia & Africa BA1 SI Partner		Alexander Schneider		Mixed	60
	ACME Company Intranet	Technical Writer	Technical Writer	Agency Staff 2	Global			Capex	
	ACME Company Intranet	Business Analyst	updated 4	Agency Staff 2	Application Development (Rollup) (FS)			Opex	

Fig. 21 XLI prompting user whether to copy the selected forecast lines.

- In many cases, it is desirable to have the 'Resource Type' field be required when working on a staffing profile position. Although unavailable in the core PPM system, it is an optional setting in XLI:
 - From the User Settings tab (available only to administrators), go to the parameter called 'Make Resource Type' Field Required on Staffing Profile Positions
 - Select 'Y'

135	
136	Make 'Resource Type' Field Required on Staffing Profile Positions
137	Value
138	N
139	
140	Security Group Name for Full Resource Pool Participation Rights
	STAFFING_PROFILE RESOURCE_POOL_PARTICIPATION REQUEST REPORT USER_SETTINGS

Fig. 22 XLI setting for making 'Resource Type' required.

- Sorting in ascending or descending order is available for any of the demand fields. 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. Notes:
 - When allocations are enabled, the sorting operation always keeps all position rows together (demand + allocations + total line) but does not apply the sort to any of the non-demand rows
 - Highlighted cells (reflecting cell updates) do not maintain their formatting after sorting is applied, but column A of updated rows remains highlighted.
 - After sending updates to PPM, the sort order applied by the user is not preserved.
- Similar to the core PPM user interface, the value of the "Label" position is automatically defaulted to the value of the position's "Role".
- Similar to PPM's logic, the resource pool, cost category, role, and label of positions gets automatically set when a "Specific Resource Requested" is selected, under the following conditions: 1) These fields are blank 2) All the specific resource(s) requested share the same values.
- As an optional configuration, the process of assigning resources to work plan tasks may be streamlined. The standard PPM resource assignment process consists of three steps: Project managers request a resource from a pool, pool managers then commit or soft book a resource, and project managers then assign him to work plan tasks. However, with this optional

configuration, project managers may specify the work plan tasks to assign the resource to when they make their requests to pool managers. Then, when the resource is soft booked or committed, he gets automatically assigned to these tasks, thus eliminating the delay or effort associated with manual work plan task assignments. This mechanism works as follows in the XLI:

- Custom (user data) “Task(s) to Assign” field is added at the position level, which project managers may use to designate the task(s) which soft booked or committed resources should be assigned to on the project’s work plan. This field may be populated either using auto completion or by clicking on the list button.
- For tasks to be selected, they must meet the following criteria:
 - The associated project request must be active
 - The project’s work plan must be in 'Active' or 'In Planning' statuses
 - The tasks must be leaf tasks
 - The tasks must not be closed or cancelled
 - The tasks' effort calculation mode must be set to 'Automatic'
 - The tasks cannot have any unassigned actuals
- Once resource pool managers soft book or commit new resources to position(s), the XLI will automatically make all feasible work plan task assignments based on the values of the custom field
- Note that only at the time of committing or soft booking resources to staffing profile positions does the XLI perform work plan assignments.

In order to add this capability, configure the following three PPM Staffing Profile Position User Data fields. Note that all attributes, other than the database columns used, must match:

Prompt	Token	User Data Col.	Displayed	Component Type	Validation	Required	Display Only
Tasks(s)	TASKS	USER_DATA3	Y	Text Area	Text Area	N	Y
Tasks(s) HIDDEN 1	TASKS_HIDDEN1	USER_DATA4	N	Text Area	Text Area	N	N
Tasks(s) HIDDEN 2	TASKS_HIDDEN2	USER_DATA6	N	Text Area	Text Area	N	N

Fig. 23 PPM Staffing Profile Position User Data fields

Then, configure the following three corresponding XLI Staffing Profile User Data fields, as follows:

Field:	userData3, userData4, userData6 Note: Change based on the database columns used in the previous step
Caption:	Assign to Task(s), Assign to Task(s) HIDDEN 1, Assign to Task(s) HIDDEN 2
Validation Type:	Pop-Up, Text, Text
Editable:	Y, Y, Y
Required:	N, N, N
Pop-Up Form Data Source	<i>SELECT fld FROM (SELECT (CASE WHEN tsmpar.outline_level > 1 THEN infopar.name '\ ' info.name ELSE info.name END) '(#' tsmpar.task_id ')' fld</i>

SQL	<pre> FROM kcrtr_requests req, kcrtr_fg_pfm_project pfm, pm_projects prj, pm_work_plans wp, wp_tasks rtsk, wp_task_info rinfo, wp_tasks tsk, wp_task_info info, wp_tasks tsmpar, wp_task_info infopar WHERE req.request_id = pfm.request_id AND req.status_code IN('NEW','IN_PROGRESS') AND pfm.prj_staff_prof_id = RANGE('16369') AND pfm.prj_project_id = prj.project_id AND prj.project_id = wp.project_id AND wp.entity_type = 'WORK_PLAN' AND wp.root_task_id = rtsk.task_id AND rtsk.task_info_id = rinfo.task_info_id AND rinfo.status IN (5,13) AND wp.work_plan_id = tsk.work_plan_id AND tsk.task_info_id = info.task_info_id AND tsk.outline_level > 1 AND info.status NOT IN (6, 7) AND info.auto_effort_mode = 'Y' AND info.task_type_code = 'L' AND tsk.parent_task_id = tsmpar.task_id AND tsmpar.task_info_id = infopar.task_info_id AND UPPER(DECODE(tskpar.outline_level,1,info.name '#' tsk.task_id '),infopar.name '\\ ' info.name '#' tsk.task_id ')) LIKE UPPER('%#?#%') ORDER BY tsk.sequence_number) WHERE ROWNUM < ([MAX_MULT_ROWS] + 1) Notes: <ul style="list-style-type: none"> • Include for the first field only. • If these fields are the first user data fields in the table, keep the highlighted 16369 reference above. However, reduce this number by one, for each field above them. For example, if they appear second, change it to 16368. </pre>
Column Width:	40, 0, 0
Multiselect (Pop-Ups Only):	Y

9. Working with Resource Pools

The Resource Pool Participation worksheet allows users, namely Resource Managers or PPM administrators, to update the participations of users and their availability within their associated resource pools.

Data Retrieval

- The 'Search' button is enabled by default. The user may optionally specify any part of a user's last name or click the 'Search' button to bring up additional search criteria.

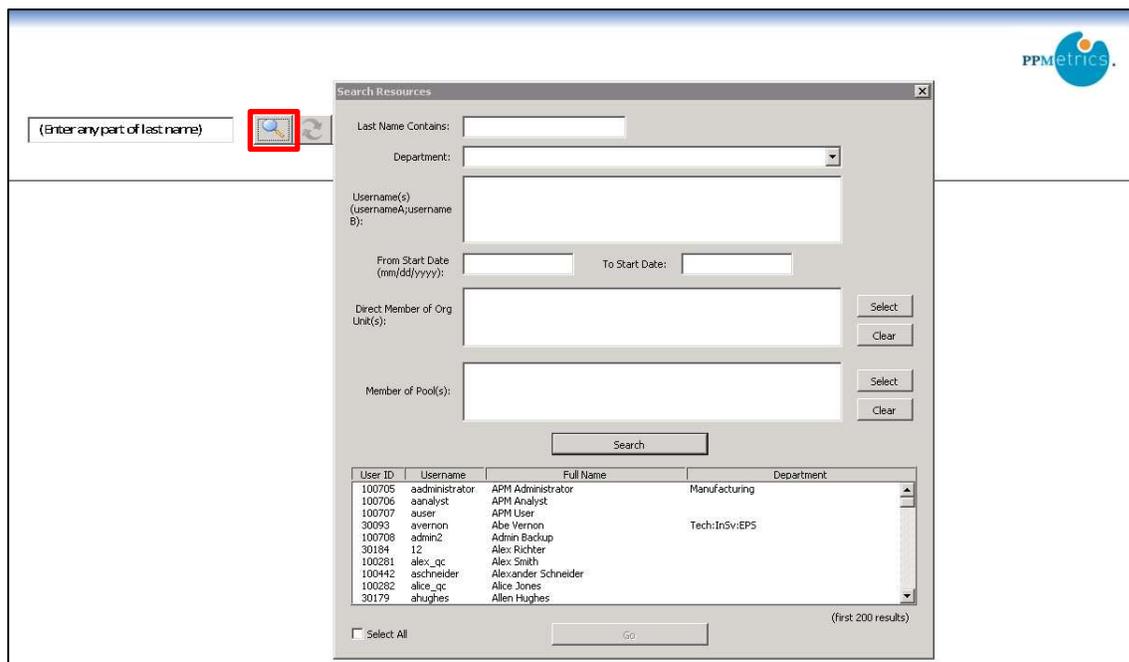


Fig. 24 Clicking the 'Search' button brings up additional search criteria and results to select from.

- Criteria from the ensuing pop up box include:
 - Last Name Contains
 - Department
 - Username Contains
 - Resource Start Date
 - Member of Org Unit – allows user to bring up all resources that belong to specific org unit (s)
 - Member of Pool – allows user to bring up all resources that belong to specific resource pool (s)
- Clicking the 'Search' button will bring up only resources updateable by the active XLI user in the results list.
- Select the resource(s) and click the 'Go' button to load them into the sheet.

Updates

- Once the selected resources have 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.
- Clicking in Resource Pool cells will enable the Pick List button  in the XLI and when clicked, will bring a pop-up screen where searching and selections can be made.

Effective date for a resource's participation

The resource pools that a resource participates in

Percentage of time spent in each resource pool

Brian Christy (bchristy)			Cheryl Wilson (cwilson)			Dave Olson (dolson)			Edith Weiss (ewiss)	
Effective Date	Resource Pool	% of Time	Effective Date	Resource Pool	% of Time	Effective Date	Resource Pool	% of Time	Effective Date	Resource
		100.00			20.00			80.00	1/1/2014	Non-Developers (WW)
1/1/2013	Global	50.00	1/1/2016	Global	80.00					Global
		50.00			80.00					
1/1/2009	On-line Banking Development - Team 1 (AMS) (FS)	40.00	6/1/2014	Commercial Banking Development - Team DR (AMS) (FS)	90.00					
	Commercial Banking Development - Team DR (AMS) (FS)	50.00		Global	10.00					
		90.00			100.00					
			2/1/2014	Commercial Banking Development - Team DR (AMS) (FS)	90.00					
					90.00					
			1/1/2009	Application Quality Management	20.00					
				Commercial Banking Development - Team DR (AMS) (FS)	60.00					
					80.00					

Fig. 25 Results screen with resources and their resource pool participations retrieved.

- ▶ The number of pools a resource may be added to for each effective date is configurable by system administrators.

Additional Features

- Clicking on the resource name shows their assignments and current resource pool participations.

Abe Verman (averman)			Alex Richter (12)			Alex Smith (alex_gc)		
Effective Date	Resource Pool	% of Time	Effective Date	Resource Pool	% of Time	Effective Date	Resource Pool	% of Time
	Commercial Banking Development - Team 1 (AMS) (FS)							
5/14/2016	Offshore Partner A							
2/22/2016	GIS Consultants							
1/10/2016	Application Quality							
1/1/2016	GIS Consultants							

Resource Assignments and Participation

Assignments

Resource Name	Entity Type	Entity Name	Status	05/17	06/17	07/17	08/17	09/17	10/17
Alex Smith (alex_gc)	Project	AB Processing System	Soft Booked	.4	.4	.4	.4	.4	.4

Note: FTE information is calculated based on the resource's capacity. Total FTE > 1 = Overallocation

Resource Pool Participation

Resource Pool	Current Participation
GIS Consultants	40%
Global	40%
QA On-line Banking (FS)	20%

Fig. 26 Clicking on resource, shows their future assignments and resource pool participation.

- The XLI provides an administrator-defined number of empty participation groups (effective dates) for each user after their current information. The user may use these empty groups to update a resource's future participation in resource pool(s) with an effective date and percentage of time.

Brian Christy (bchristy)		Cheryl Wilson (cwilson)		Dave Olson (dolson)		Edith Weiss (e weiss)	
Effective Date	Resource Pool	% of Time	Effective Date	Resource Pool	% of Time	Effective Date	Resource Pool
		100.00			20.00		
1/1/2013	Global	50.00	1/1/2015	Global	80.00	1/1/2014	Non-Developers (W... Global
		50.00			80.00		
1/1/2009	On-line Banking Development - Team 1 (AMS) (FS)	40.00	6/1/2014	Commercial Banking Development - Team DR (AMS) (FS)	90.00		
	Commercial Banking Development - Team DR (AMS) (FS)	50.00		Global	10.00		
		90.00			100.00		
			2/1/2014	Commercial Banking Development - Team DR (AMS) (FS)	90.00		
					90.00		
			1/1/2009	Application Quality Management	20.00		
				Commercial Banking Development - Team DR (AMS) (FS)	60.00		
					80.00		

Fig. 27 Additional participation information can be added to a resource by using the empty participation groups allotted to each resource.

- Clicking on the binocular icon opens up the bulk updates form, allowing you to perform the following operations:
 - Add all downloaded resources to a new pool and effective date
 - Move all resources from an existing pool to a new pool, including the option of updating staffing profile assignments referencing the old pool
 - Replacing participation percentages in bulk for the downloaded resources

Abe Vernon (avernan)		Alex Richter (arichter)	
Effective Date	Resource Pool	Effective Date	Resource Pool
1/1/2025	Database Admins Cloud Team		
11/27/2024	Current Portfolio (ITFM R2) Database Admins		
7/18/2024	Current Portfolio (ITFM R2) Database Admins		
11/22/2022	Current Portfolio (ITFM R2) Database Admins		

Perform Bulk Updates

Add Pool Memberships

Effective Date (mm/dd/yyyy): % of Time:

Pool:

Replace Existing Pool Memberships

Old Pool:

New Pool:

Replace Participation %

Old % of Time: New % of Time:

Fig. 28 Multiple resources may be moved from one pool to another using the resource replacement option.

- If the administrative setting “Clear Staffing Profile Assignments Upon Removal from Resource Pools” has been enabled, when a resource is removed from a pool, all his future active staffing profile assignments made from that pool, or its children, get cleared automatically. If the resource has a future re-join date to the same pool, then assignments are cleared up until that date.
- The XLI may optionally send email notifications to projects managers, other than the active XLI user, when the quarterly demand changes above or below a specified FTE amount. This capability is

enabled and set using the setting “Notify Stakeholders When Quarterly Staffing Profile Demand Changes by +/- FTE (0 = No Notifications)”. These email notifications are sent using the UTL_SMTP Oracle package, which must be enabled and set to use the same SMTP server as PPM. If certain staffing profiles need to be excluded from triggering email notifications, that may be accomplished using the setting “Staffing Profiles Excluded From Effort Change Notifications (STAFFING_PROFILE_ID1, STAFFING_PROFILE_ID2)”.

10. 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. Furthermore, since the XLI resource management module is aimed at data updates, only records that are updateable by the user, based on the PPM security model, are made visible in searches.

Staffing Profile Search and Updates

The following criteria must be met in order for a user to be able to retrieve and update a staffing profile:

- Either “Demand Management” or “Configuration” license
- Have either the “Edit All Staffing Profiles” or “Edit Staffing Profiles” access grants
- If the user only has the “Edit Staffing Profiles” access grant, one of the following two criteria must be met:
 - The user appears on the profile’s access control list with the ability to edit positions. Once retrieved, such a user would be able to update forecast lines.
 - The user has the “Edit Resource Pools” or “Edit All Resource Pools” access grants and is a manager of at least one pool referenced in at least one position of the profile. Once retrieved, such a user would be able to update the assignments of those positions.

Staffing Profile Header Creation and Updates

One of the following criteria must be met in order for a user to be able to create a staffing profile for an entity:

- Either “Demand Management” or “Configuration” license
- Have the “Edit All Staffing Profiles” and “Create Staffing Profiles” access grants
- Have the “Edit Staffing Profiles” and “Create Staffing Profiles” access grants + be the project manager (if entity type = project) or have the ability to update the request (if entity type = proposal or asset)

One of the following criteria must be met in order for a user to be able to edit a staffing profile header:

- Have the “Edit All Staffing Profiles” access grant
- Have the “Edit Staffing Profiles” access grant and appear on the profile’s access control list as a user able update header information

Resource Pool Participation

For a user to be able to retrieve and update resource pool participation of a resource he must own the “Demand Management”, “Configuration”, or “Time Management” license. Additionally, at least one of the following criteria must be met:

- Have the “Edit All Resources” and “Edit All Resource Pools” access grants.
- Have the “Edit All Resources” access grant and be the manager of the pool or the direct manager of the resources to update.
- Have the “Edit Only Resources that I Manage” access grant and be their direct manager.
- Be a member of the security group specified in the “Security Group Name for Full Resource Pool Participation Rights” admin setting (any new or old PPM security group may be used, and the XLI doesn’t require it to have any access grants).