Excel Interface (XLI)
For Micro Focus

PPMetrics – Time 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.
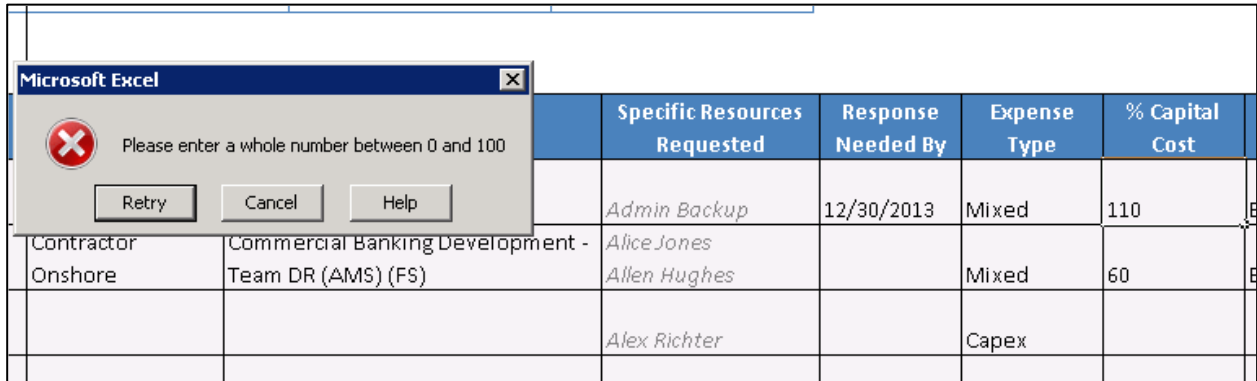
Fig. 3 Example of XLI native error handling.

- 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 Time Sheets

Supported Time Management Functionality

The Time Management module of the XLI comes in two versions:

1. Time approval only, the default setup, typically requiring little to no configuration.
2. Full time editing, an optional setup, which requires some configuration in order to account for the organization's policies and other settings.

As with other modules, the XLI will honor the PPM security of the user and underlying Time Management logic. For example, only time sheets which the user can act upon are displayed in the search results.

Benefits of Using the XLI Time Management Module for Time Approval

Time approval is an organizational function performed by a large number of managers on a recurring basis, hence costly. Therefore, any improvement to this function has a meaningful positive impact and the XLI offers the following benefits:

1. The ability to view the full details of time sheets and approve them from as single screen.
2. The ability to approve any number of time sheets all at once.
3. The ability to display any relevant data field alongside the time data (e.g. work plan task fields).
4. The ability to search for time sheet data based on any relevant PPM field.
5. The ability to easily switch to other related XLI worksheets for data correlation or otherwise.

Data Retrieval

- The 'Search' or magnifying glass button is enabled by default. If any part of the resource name or time period is known, it may be entered into the text box, followed by a click on the 'Search' button or a tab key press.
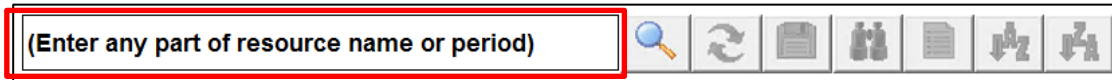
Fig. 6 The 'Search' button allows searching by resource or period in the text box or other criteria.

- When the magnifying glass button is clicked, the time sheet 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 time sheets available to the user based on the PPM security model. List of search fields:
    - Resource Name or Period Contains – Any part of a specific user or period
    - Custom Filters – Additional filters may appear here in this section if they have been configured by the administrator
- If no criteria are entered on the time sheets search screen and the 'Search' button is clicked, the XLI will retrieve all the eligible time sheets.
- Irrespective of the filters used, when the XLI has been set up for *time approval only*, the search will never retrieve time sheets unless they meet all the following criteria:
    - They are in the "Pending Approval" or "In Rework" statuses
    - They contain at least one line eligible for approval by the active XLI user, based on the PPM security model (delegate functionality is taken into account).
    - They fall within the time frame of the "Number of Past Days to Include in Time Sheet Search" and "Number of Future Days to Include in Time Sheet Search" administrative settings.
- Irrespective of the filters used, when the XLI has been set up for *full time editing*, the search will never retrieve time sheets unless they meet all the following criteria (while still retrieving all time sheets eligible for approval as per the criteria above):
    - They are either in the "Unsubmitted", "Pending Approval", "In Rework", "Approved" statuses or are eligible for creation but have not been created yet in which case the XLI labels them as "Not Created". If any "Not Created" time sheets are retrieved into the XLI, corresponding time sheets are automatically created in PPM and saved with the status from the edits within the XLI or "Unsubmitted" if no changes were made via the XLI.
    - For existing time sheets, they must contain at least one line eligible for editing by the active XLI user, based on the PPM security model (delegate functionality is taken into account).
    - They fall within the time frame of the "Number of Past Days to Include in Time Sheet Search" and "Number of Future Days to Include in Time Sheet Search" administrative settings.
- Additionally, when the XLI has been set up for *full time editing* and one or more time sheets have been selected for creation, it further provides the option of creating them while also copying eligible work items from the previous period(s).
- From the results, the user selects which of the time sheets to retrieve by clicking on single or multiple entities and then clicking 'Go.'

    - ➤ The XLI limits the number of time sheets retrieved to a default value of 200 which can be adjusted by the administrator.
    - ➤ 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.
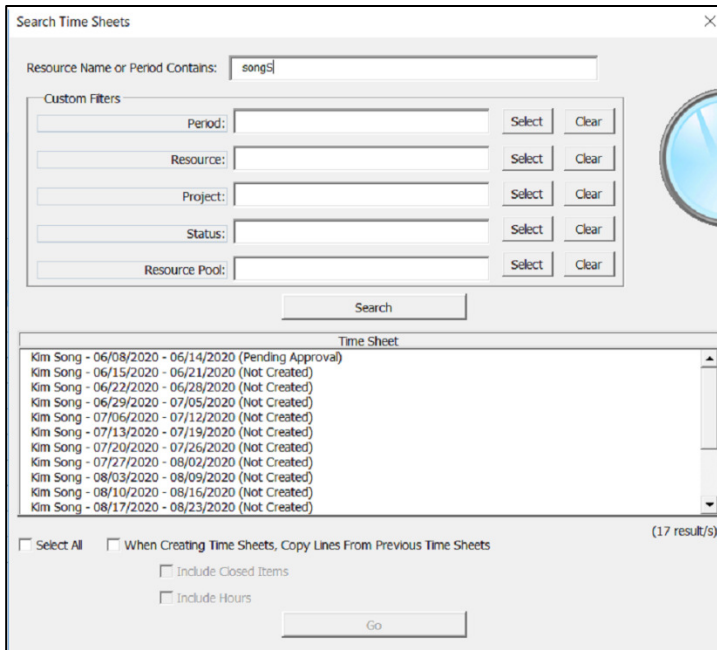
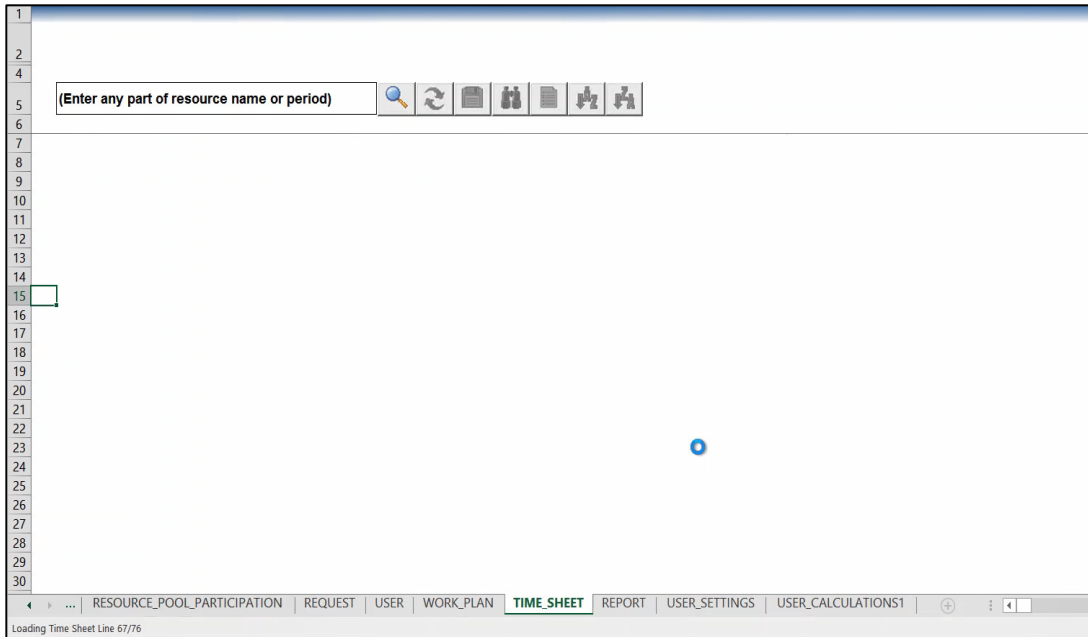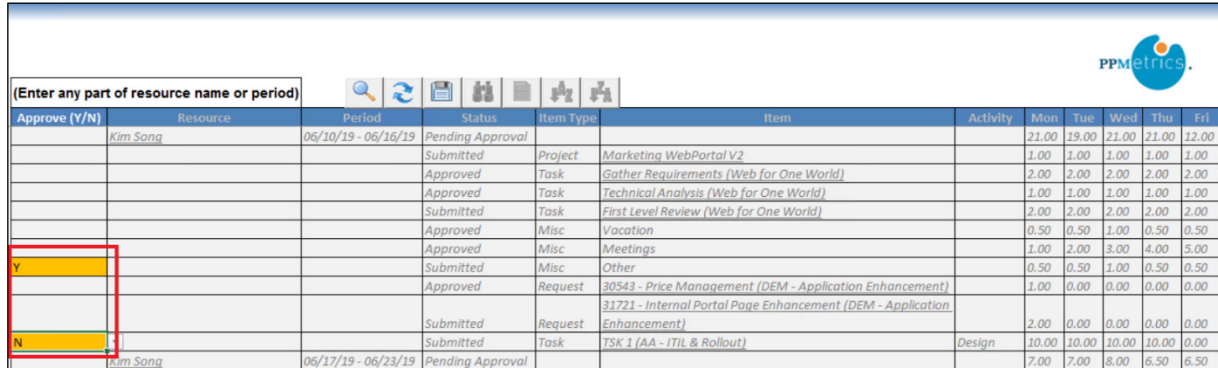*Fig. 7 Time sheets search criteria with sample custom filters and results.*

Fig. 8 Status bar displays number of time sheet lines being retrieved into the XLI.

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

Time Sheet Approval

- Once the selected time sheet data has been loaded into the XLI, the user may not make any changes to the data (grayed out cells). The user will only be able to approve or reject individual time sheet lines, or complete time sheets, by going to the 'Approve' column **Approve** and selecting 'Y' or 'N'. Once all the approvals are done, hit the 'Save' button 🖫 to upload the changes back to PPM.
- By default, the XLI includes time sheet line information, daily effort breakdown, and totals. At the same time, columns may be configured to be added or removed by your administrator.
- If the time sheets contain line(s) which aren't approvable by the active XLI user, then these lines will not be downloaded.
- For time sheet lines containing activities, each activity will appear in a separate row, but only the first one will have the Y/N option, which will then apply to the entire time sheet line.
- Once the save operation is complete, the XLI will re-download the same time sheets so that the time sheet line status changes are visible. However, time sheets which their statuses are no longer "In Rework" or "Pending Approval" will not be downloaded as they do not meet the criteria specified above.

➤ As a shortcut for mass approval, once you designate approval/rejection on the uppermost cell, the XLI will ask you whether to apply the same decision to all the eligible lines below it. Similarly, if you designate approval/rejection at the time sheet level (of any downloaded timesheet), it will automatically apply to all the eligible lines in that timesheet.

Approve (Y/N)	Resource	Period	Status	Item Type	Item	Activity	Mon	Tue	Wed	Thu	Fri
	Kim Song	06/10/19 - 06/16/19	Pending Approval				21.00	19.00	21.00	21.00	12.00
			Submitted	Project	Marketing WebPortal V2		1.00	1.00	1.00	1.00	1.00
			Approved	Task	Gather Requirements (Web for One World)		2.00	2.00	2.00	2.00	2.00
			Approved	Task	Technical Analysis (Web for One World)		1.00	1.00	1.00	1.00	1.00
			Submitted	Task	First Level Review (Web for One World)		2.00	2.00	2.00	2.00	2.00
			Approved	Misc	Vacation		0.50	0.50	1.00	0.50	0.50
			Approved	Misc	Meetings		1.00	2.00	3.00	4.00	5.00
Y			Submitted	Misc	Other		0.50	0.50	1.00	0.50	0.50
			Approved	Request	30543 - Price Management (DEM - Application Enhancement)		1.00	0.00	0.00	0.00	0.00
			Submitted	Request	31721 - Internal Portal Page Enhancement (DEM - Application Enhancement)		2.00	0.00	0.00	0.00	0.00
N			Submitted	Task	TSK 1 (AA - ITIL & Rollout)	Design	10.00	10.00	10.00	10.00	0.00
	Kim Song	06/17/19 - 06/23/19	Pending Approval				7.00	7.00	8.00	6.50	6.50

Fig. 9 Approval and rejection of individual lines or timesheets.

Time Sheet Editing

- In order to create new time sheets, the user is to retrieve time sheets labeled as "Not Created" by the XLI. See 'Data Retrieval' section above for more information.
- If the user is authorized to edit time sheet lines, he can modify them by using the selections in the Reword, Delete, or Cancel columns, and manually editing breakdown information. For convenience, the editable cells of these columns are clearly marked. Additionally, as a useful shortcut, when the uppermost cell of each column is filled out, the XLI provides the option of auto-populating the same value across all the eligible rows below it.

Fig. 10 Any changes to the time sheet(s) are highlighted within the edited cells and via the first column.

- In order to add a time sheet line to the current or highlighted time sheet(s), the user should highlight a single cell in one of the empty rows to activate the 'Add' button ![Add button]. Once clicked and a line has been added, the user can click on the Item Type column ![* Item Type] to select what work item type to add and then select the specific work item type in the Item column ![* Item] either through direct entry of any part of the work item's name, or by clicking on the list ![list icon] icon. Work items that qualify as a 'suggested items' always appear at the top of the list.

Fig. 11 After adding a time sheet line, clicking the pop-up selection button to bring up Item search screen.

- Once all the edits are complete, hit the 'Save' button to save the changes back to PPM. The XLI will prompt if any eligible time sheet(s) should be submitted at the same time.
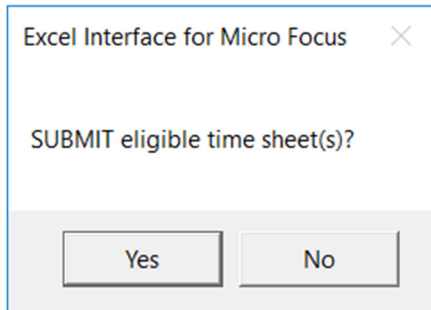

Fig. 12 Confirm if Save should include any eligible submissions.

- Upon save or submission, PPM time management policies and other settings will be considered. If there are any violations, the current action will be cancelled, and the offending time sheet(s) will be highlighted to the user.
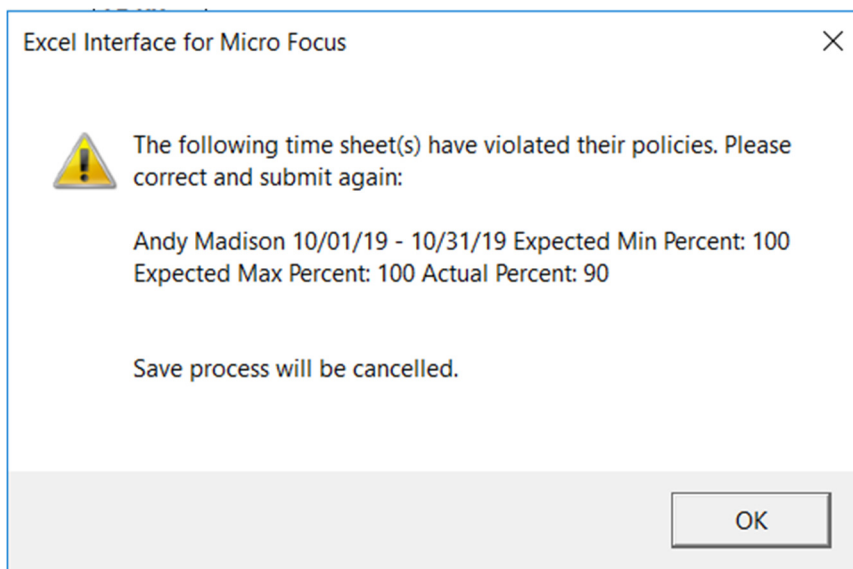

Fig. 13 Sample error message when a violation has been detected.

- Once the save/submit operation is complete, the XLI will attempt to re-download the same time sheets so that the time sheet line status changes are visible.

9. 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 time 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.

Time Sheet Approvals

The following criteria must be met in order for a user to be able to retrieve and approve a time sheet:

- Have the "Time Management" license or "Configuration Management" license
- Have the "Approve Time Sheets" access grant
- Have the "View Time Sheets" access grant
- Be the designated time approver or his delegate

Time Sheet Edits

The following criteria must be met in order for a user to be able to retrieve and edit time sheet:

- Have the "Time Management" or "Configuration Management" license
- Have the "Edit Time Sheets" or "Edit All Time Sheets" access grant
- Have the "View Time Sheets" access grant
- Be the resource associated with the time sheets or a delegate (Or in PPM 9.4 a time approver).