

Fields in PSNext 3.0

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A -Introduction

Fields enable the customization of data structures by giving the possibility to create new properties for each object that can be managed in PSNext.

Field enhancements in PSNext 3.0 respond to a variety of needs regarding fields management. When working with a large number of fields, Administrators will find new possibilities of customizing the Fields view to help them better arrange and organize fields, while users will easily find the field they are looking for by using Field Sets.

Additionally, PSNext 3.0 enlarges the available field types and kinds to help users better represent object properties such as multiple choice lists, utilization of the built-in structures (organization, jobs, skills, etc.) , and reutilization of pick list definitions.

B -Customize the Fields View

Fields management in PSNext is done in the “Fields” view of the System component. PSNext 3.0 enhances the way the content is managed so that Administrators can arrange and customize it for an easy field's management.

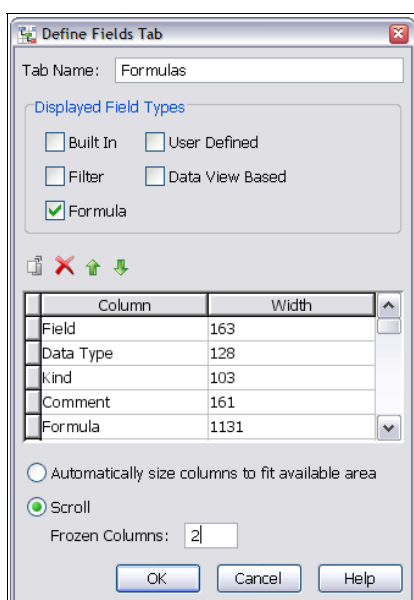
1 - Spreadsheets

Fields listed in tabs are now listed within a spreadsheet with rows and columns that can be customized.

Field	Data Type	Kind	Corr
Variance (Actuals)	decimal	Normal	IT
Variance (Plan)	decimal	Normal	IT
New formula			

Fig 1. Fields are now listed in spreadsheets

A double click on any column header will bring up the “Define Fields tab” dialog box where the user can define the type of fields that will be displayed in the spreadsheet as well as the different columns to be included.



TAB NAME	LABEL OF THE TAB
DISPLAYED FIELD TYPES	Select the types of fields that will be included in the spreadsheet. When creating a new field in a spreadsheet containing multiple field types, PSNext will ask to confirm the desired type. Make sure that the tab's name and content are consistent.
COLUMN LIST	Select the properties of each field (column) to display in the spreadsheet.

Fig 2. Customizing the content of a spreadsheet

The new “Field type” property will help users to easily find if the field is a Built-in field, a User Defined Field, a Formula, a Filter or a View based Field.

Field	Field Type	Alias	F
% Completed	Built-in		B
% Cost Variance	Formula		F
% Duration Varian...	Formula		F
% Effort Variance	Formula		F
% Plan Variance	Formula		F
% Schedule Varia...	Formula		F
Accounting Codes	UDF		U

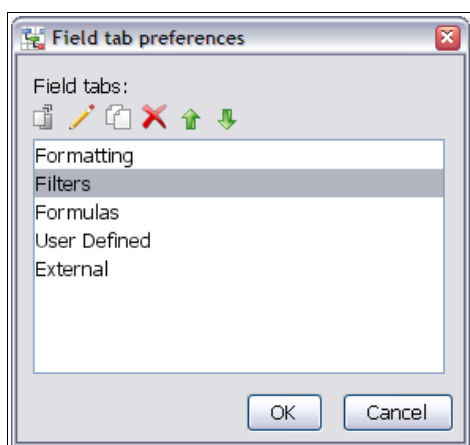
Fig 3. The “Field Type” property

A double click on a line's header will display the edit dialog box of the selected field.

2 - Tabs

Fields are organized in tabs that can be fully customized. Administrators can rename, copy delete or create tabs in the System/Fields view.

Double click on the name of any tab to display the “Field tab preferences” dialog box:



	Create a new tab
	Edit the properties of the selected tab
	Delete the selected tab
	Change the selected tab's position

Fig 4. Managing the tabs of the Field's view

Any spreadsheet or tab customization is saved in the logged-in user's profile and will be available the next time the user will log into PSNext. If there were more than one Field administrators in the system, each of them would have its own independent settings for the Fields view.

C -Field Sets

Field sets arrange fields into groups so that users can easily find the field they are looking for when customizing a spreadsheet, creating a filter or a formula.

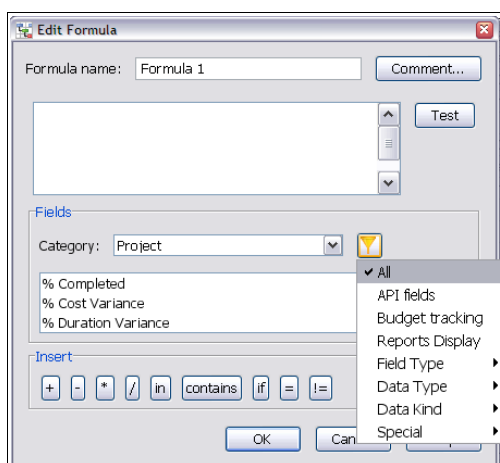


Fig 5. Field Sets can be used in Formula/Filter dialog boxes

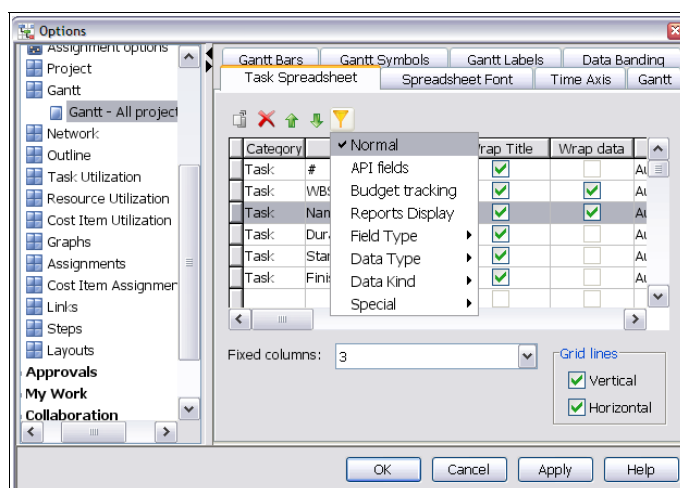


Fig 6. Field Sets can be used in spreadsheet column selectors

In these areas a Field Set selector  has been added displaying the available Field Sets.

In PSNext 3.0 there are two kinds of Field Sets:

- Built-in field sets
- Custom field sets

1 -Built-in Field Sets

Four Built-in field sets are available:

- Field type : Grouping fields by their type (Built-in, Formula, User Defined, etc.)
- Data type : Grouping fields by their data type (cost, effort, duration, date, etc.)
- Data kind :Grouping fields by their data kind (Dated, Distr, or List)
- Special : URL, Resources, User, Organization, [Reference], or Exposed

Built-in field sets are cross-categories. They automatically apply to all fields whatever their category is.

For example, if you select the “Cost” built-in field set, you will only have access to a list of cost type fields in any category.

2 - Custom Field Sets

PSNext administrators can create new Field Sets and choose the fields that will belong to it. A custom Field Set should define the fields of each category it will include.

For each category the Field Set might include all the fields of the category or only some of them.

An Administrator could create Field Sets to identify specific fields that are useful for a given department or a project management standard or methodology.

Field sets can be created under System/Fields in the “Field Sets” column (you might need to display it). A three dot button will bring up the “Field Set Selector” dialog box from which the user will be able to “Add/Maintain Field Sets...”

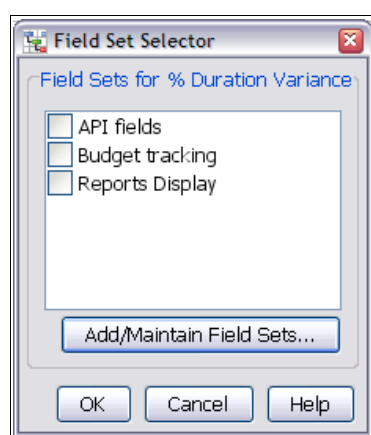


Fig 7. “Field set” selector for a given field

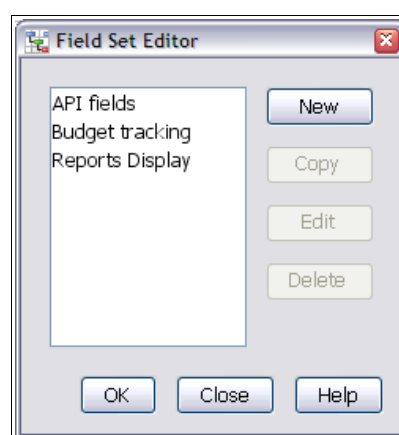


Fig 8. Field Set Editor dialog box

Creation or edition process will finally take place in the “Field Set Properties” DB:

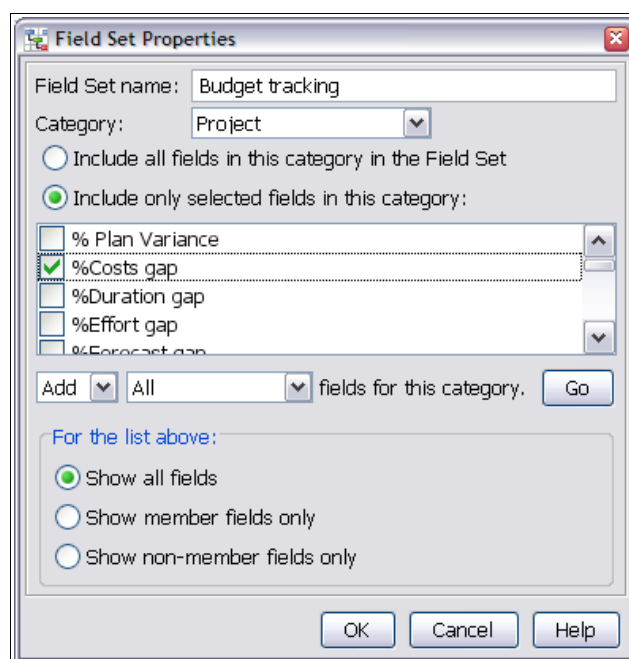


Fig 9. Selecting the fields of each category that belong to the Field Set

Field Set name	Name to be displayed to users when applying the Field Set
Category	List of all the categories that will provide fields to the Field Set
Include all fields	Every field (existing or to be created) of the selected “Category” will be included in the Field Set.
Include only selected fields	By selecting this option the fields of the selected “Category” can be chosen individually to belong to the Field Set definition.
Add/Clear controls	These controls help to easily check or uncheck the fields selection.
Show controls	These controls will filter the listed fields according to their membership.

D -Pick Lists

In previous versions pick lists were created as a property of a given text field, forbidding the possibility of using this pick list for another field. The user had to create the pick list as many times as it was required, leading to a difficult maintenance.

In PSNext 3.0, Pick lists definitions can be shared by multiple fields. The pick list is created once and can then be referenced by any text field.

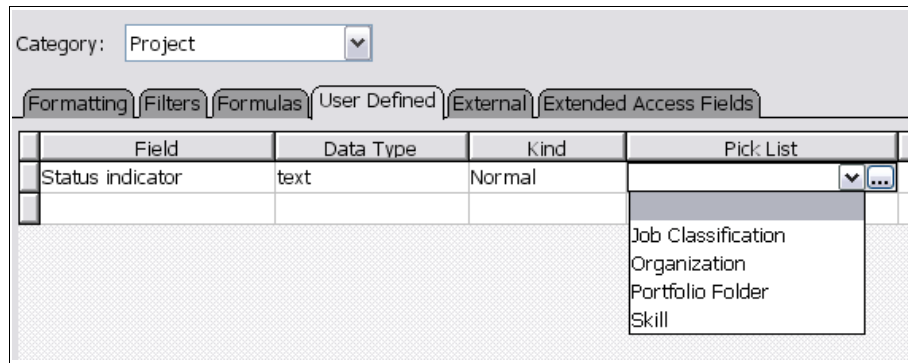


Fig 10. Available pick list definitions to be used by a text field

The three dot button next to the drop down list will display the "Pick list" dialog box where the pick lists definitions can be managed. Within this dialog box users can create, rename, delete, copy and maintain pick list definitions.

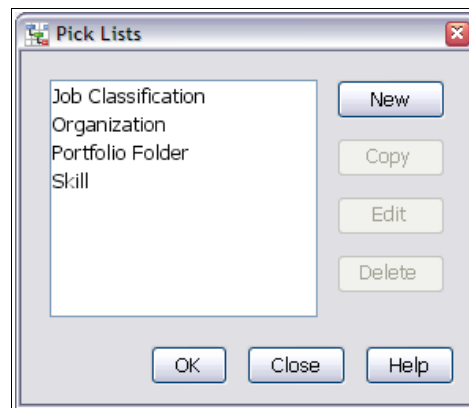


Fig 11. Pick list definitions

1 -Built-in Pick lists

PSNext 3.0 provides a set of built-in pick list definitions that can be used as source of any text field. These pick lists are : Job Classification, Organization, Portfolio Folder and Skill.

Built-in pick lists are not editable and can not be deleted, their content comes directly from the definition of their related object. When a text field will use a built-in pick list as source, the available choices will be the elements of the built-in structures.

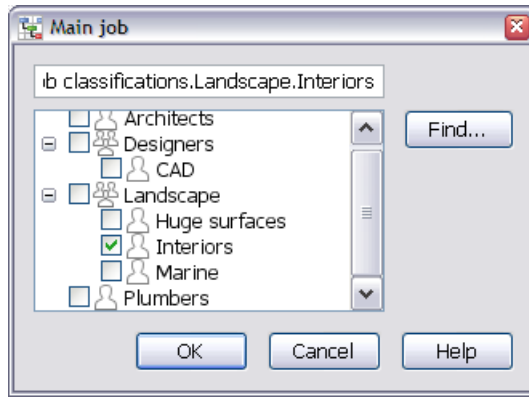

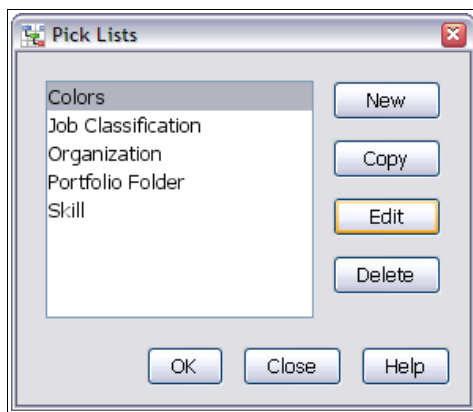


Fig 12. Example of a text field using the job class tree as a pick list source

Even though a built-in structure can be used as the source of the pick list, the actual value saved into the field is a text value.

2 -User defined pick Lists

Administrators can create pick list definitions from the “Pick list” dialog box or from the “Shared field attributes” 







	Insert a new pick list choice
	Delete the selected choice
	Change the position of the selected choice
	Indent / outdent the position of the selected choice

Fig 13. Pick list definitions

The content of the pick list itself is managed as in previous versions:

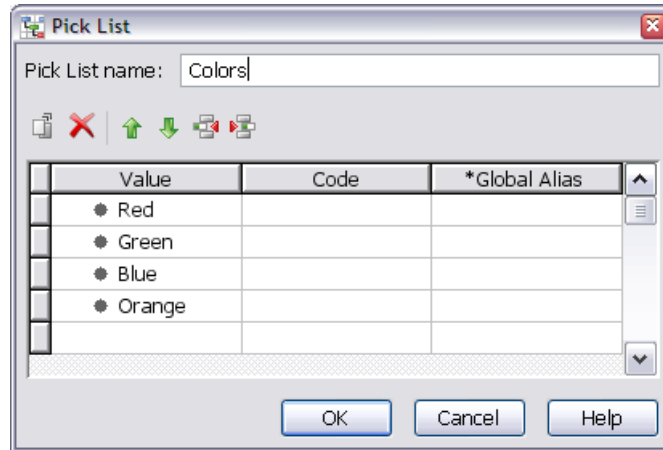


Fig 14. Defining the items of a pick list

Value	Text value of the choice that will be provided to the user.
Code	Text note displayed next to the choice when users display the pick list dialog box to make a choice. The code can be used as a short cut to select a given item from the list.
Global Alias	See the white paper Enhanced Alias Management.

E -The Organization data type

User defined fields in PSNext 3.0 can be organization-typed. In addition to the previously available data types (cost, cost per unit, duration, etc.) the organization data type has been implemented.

Organization-type fields point to the Organization defined in the System component and save their value as an organization object. As a consequence when a user will set the value of the field, the organization tree will be displayed. Since the organization object is saved within the field, a reference to the selected organization item is kept. Formulas can use the entered value to reach fields of the [Organization] category.

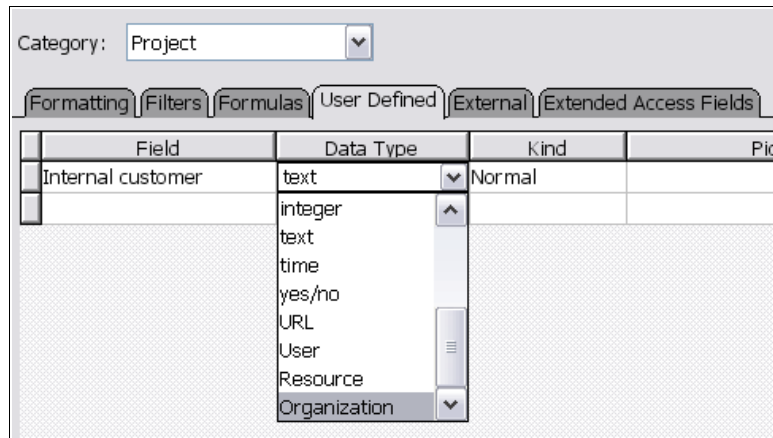


Fig 15. An organization-typed UDF

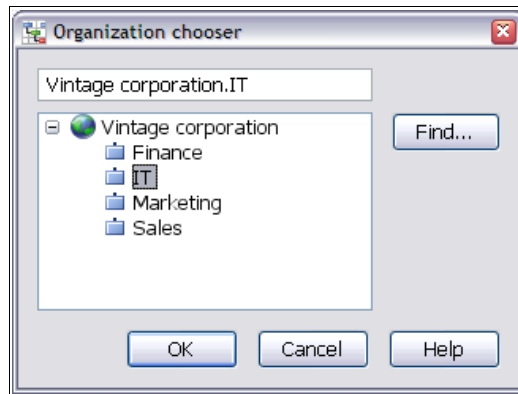


Fig 16. Choosing the value of an organization-typed UDF

F -The List kind

In addition to the previously available kinds: Normal, Dated, Distr, and Distr (Monthly), PSNext 3.0 provides a new kind for fields : List.

When defining the kind of a field as a List, this means that the field contains a list of values of it's data type. A list of costs, a list of dates, a list of users, a list of organizations, a list of text values, etc. The "List" kind can be used with any data type.

When displaying a List-kind field in a spreadsheet its values will be shown as a comma-separated text list.

Projects		
ID	Name	Internal customerS
14HBOEI	Jenner Project	Finance,Marketing,Sales

Fig 17 List values displayed in a cell

The three dot button on the cell will bring up the appropriate dialog box for choosing multiple values.



Fig 18. An organization-typed and list-kind field

All the List() functions can be applied to a list-kind field: SizeOfList(), FirstInList(), etc.

1 - Multiple choice fields

When giving the List kind to a field whose kind allows the selection of an item (Resource, User, Organization, or Text pick list), this will provide a multiple-choice selection:

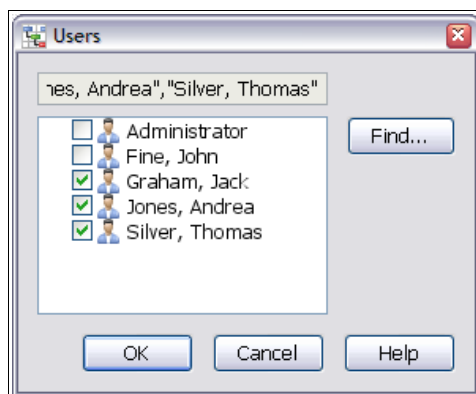


Fig 19. A multiple-choice User's list

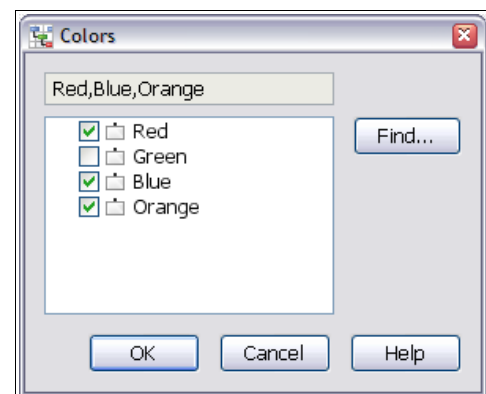


Fig 20. A multiple-choice Pick list

2 - Multiple value entries

When using the List kind on a field whose values should be manually entered (cost, duration, integer, date, etc.) PSNext will provide a dialog box for the user to enter multiple values to the field.

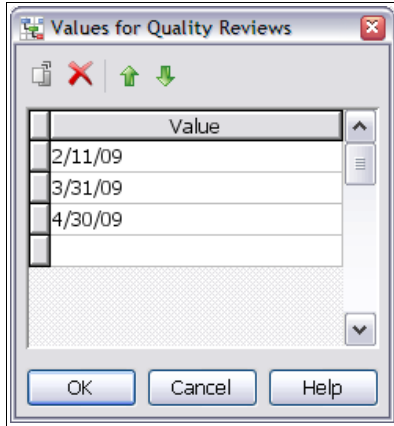


Fig 21. A date list field

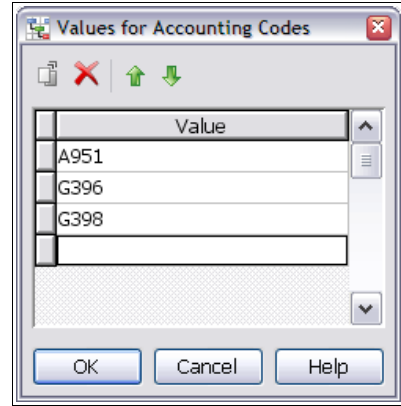


Fig 22. A text list field

G -Generic Users

Generic Users are User-typed fields that can be used to set permissions when defining an access control list (ACL).

For instance a Project's permissions can be given to the Manager 1 generic user. The permissions will be applied to the value (user) that will be entered in the Manager 1 field. Setting permissions through generic users eases permission definition updates. If ever the Manager 1 value changes, the permissions will automatically be given to the new Manager 1.

PSNext 3.0 enhances the Generic users feature by supporting the new "Organization" data type as well as the new "List" kind.

Additionally new Generic User sources are available (Global generic users, Portfolio Folder generic users, etc.).

1 -Organization Generic Users

Generic users can now be based on organization-typed fields for both built-in and user defined fields.

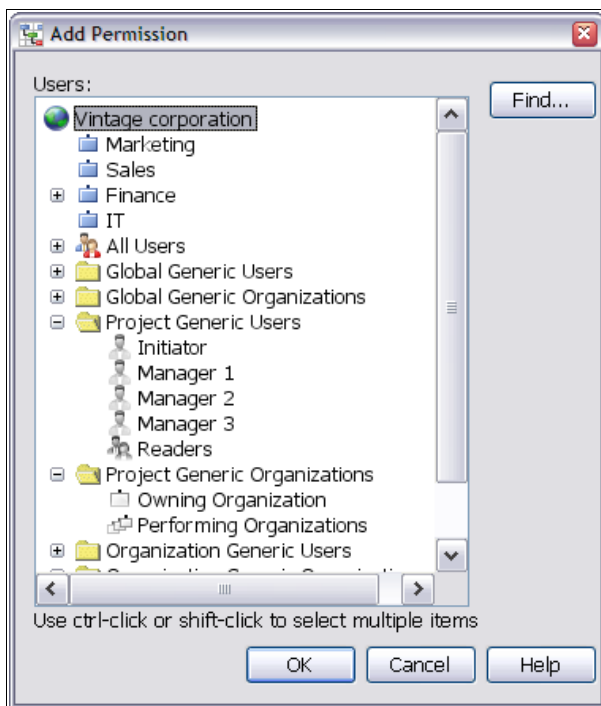






Fig 23. Generic Users for project permissions

The next table provides a summary of the available generic users that can be used for each PSNext object permission definition:

The following "grayed" icons help the user to identify the kind of the available generic users:

-  **Generic User:**
User-typed field, Normal kind.
-  **Generic User list:**
User-typed field, List kind.
-  **Generic Organization:**
Organization typed field, Normal kind.
-  **Generic Organization list:**
Organization typed field, List kind.

PERMISSION SETTINGS	AVAILABLE GENERIC USERS	
Project Permissions	Global Generic Users Global Generic Organizations Project Generic Users Project Generic Organizations	Organization Generic Users Organization Generic Organizations Portfolio Folder Generic Users Portfolio Folder Generic Organizations
Work package permissions	Global Generic Users Global Generic Organizations Project Generic Users Project Generic Organizations	Task Generic Users Task Generic Organizations
Document Permissions	Global Generic Users Global Generic Organizations Project Generic Users Project Generic Organizations Task Generic Users Task Generic Organizations	Organization Generic Users Organization Generic Organizations Document Generic Users Document Generic Organizations
Issue permissions	Global Generic Users Global Generic Organizations Project Generic Users Project Generic Organizations Task Generic Users Task Generic Organizations	Organization Generic Users Organization Generic Organizations Issue Generic Users Issue Generic Organizations
Organization permissions	Global Generic Users Global Generic Organizations	Organization Generic Users Organization Generic Organizations
Portfolio folder permissions	Global Generic Users Global Generic Organizations	Portfolio Folder Generic Users Portfolio Folder Generic Organizations

Table 1. Available generic users per permissions type