

User Interface in PSNext 3.0

02/15/09 – Revision 1.0

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A -Introduction

All the information that is managed within PSNext can be displayed in multiple ways according to the type of information and the interaction that will take place with each PSNext user.

PSNext allows users and administrators to customize most of the graphic user interfaces such as forms, spreadsheets, views, and tool bars through their related preferences.

In PSNext 3.0 these possibilities have been extended and enhanced. New form types have been added for Resources, Collaboration and Portfolio Management and their content can now go far beyond data entry through fields, and now forms can now contain report blocks.

Additionally, the user workspace can be fully rearranged by displaying multiple views at a time that can be resized, moved or hidden to the user's preference.

In order to protect corporate settings, Preference Sets have been introduced to manage the set of preferences that will be offered either to the whole corporation or to an individual branch of the organization.

B -Forms

A new view in the System component groups all the existing Forms within PSNext that users can customize. Forms are listed according to the Component they can be used in as well as the PSNext object that they describe:

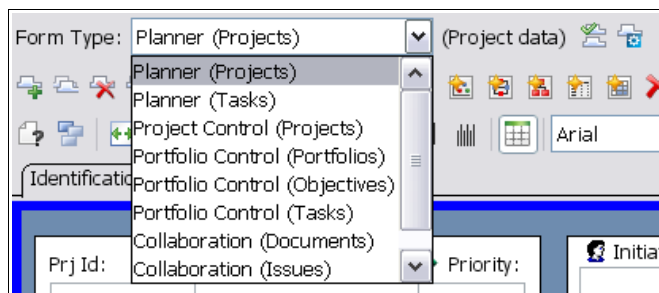


Fig 1. Form type drop down list

User defined forms are available in the following components:

- **Planner Component**

- Projects: Displays the tabs of the “Project Information form” that is used to describe a project when it is created within the Planner component. The form can also be displayed through the File/Project Information... menu for the currently selected project.
- Tasks: Includes the tabs of the “Task form” that allows users to fill-in information related to the currently selected task.

- **Project Control Component**

- Project: Allows users to define the attributes of the current project.


- **Portfolio Control Component**

- Portfolios: Allows users to define the attributes of the current Portfolio Folder.
- Objectives: Displays the tabs of the “Project Information form” that is used to describe an objective project when it is created. The form can be displayed too through the File/Project Information... menu for the currently selected objective project.
- Tasks: Includes the tabs of the “Task form” that allows users to fill-in information related to the currently selected task.

- **Collaboration Component**

- Documents: Allows users to manage the tabs identifying a Document when it is selected in the Collaboration component. The tabs of this form are referenced by a document type, a document workflow or a document workflow state.
- Issues: Allows users to manage the tabs identifying an Issue when it is selected in the Collaboration component. The tabs of this form are referenced by an issue type, an issue workflow or an issue workflow state.

1 -Show/Hide tabs for edit

When managing a large set of tabs within the same Form, administrators can use the “Show/hide tabs for edit”  control to display only those tabs that are to be designed.

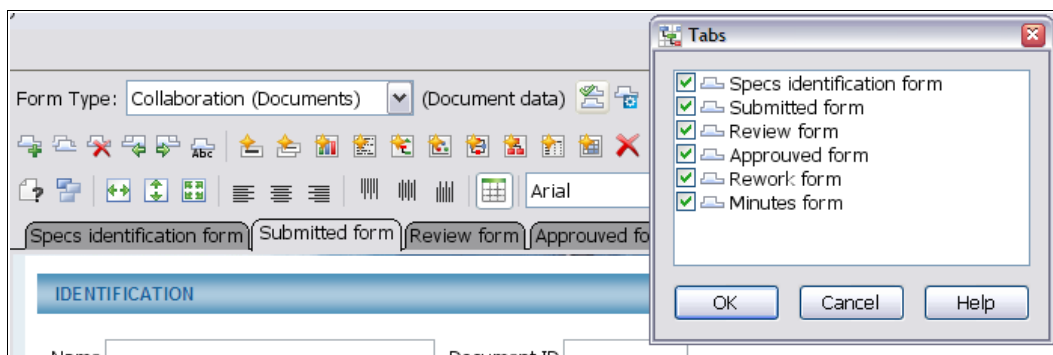


Fig 2. Administrators can choose to see only those tabs they need to edit

Note that the tool bar icon will change to alert the administrator that not all the tabs are being displayed within the form that is being edited.

2 -Dynamic Object Resizing

The size of the elements inserted within a form (cells or reports) can be dynamically adjusted to better fit the size of the form when it is displayed.

Two new controls are available in the “Extras” tab for both the “Reports” and “Cells” items.

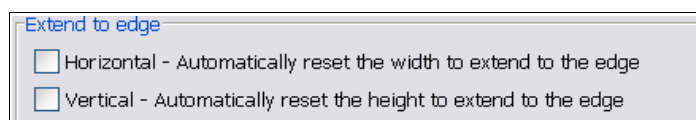


Fig 3. Extend to edge properties of a Report or Cell within a form.

3 -Embedded Reports

Forms in PSNext 3.0 can contain any kind of report. Reports are created as an object within the form and can be directly customized when editing the form.

Users can include any kind of report blocks within a form: Graph charts, Text blocks, Gantt charts, Network charts, Bubble charts, Outline trees and Matrix text blocks.

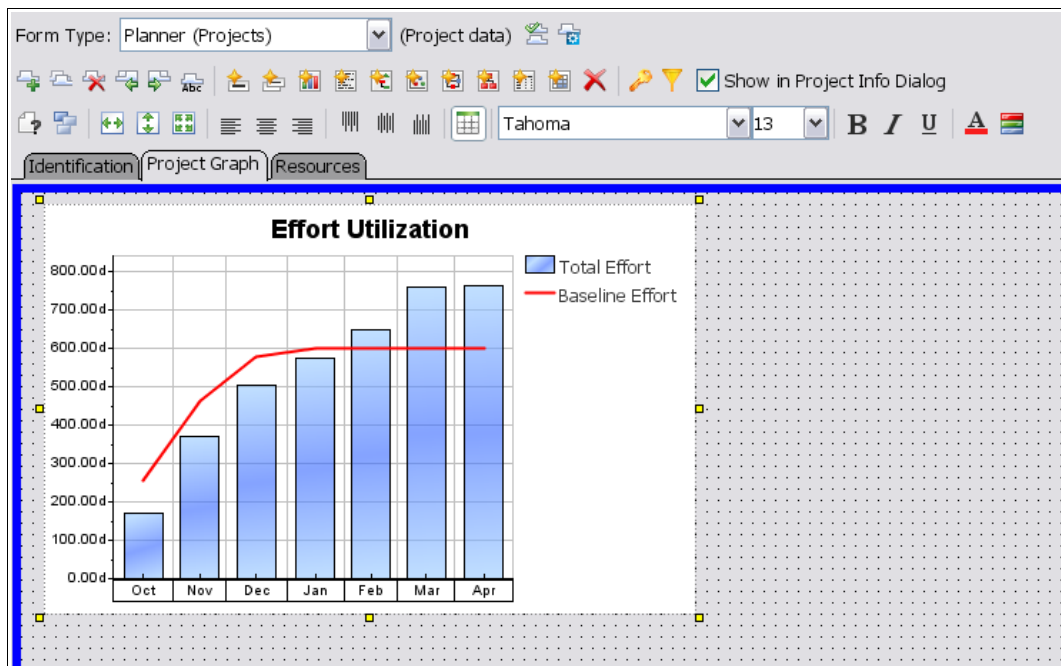



Fig 4. Graph block within a Form

When displaying a report in the Reports component users can select the context of data (resources and project scope) of the report. When displaying a form that contains a report, the context to be used corresponds to the current element being displayed in the form.

For instance, If a project form includes a report, then the Project selection would be the currently selected project, while the Resources selection would be the project's performing resources.

4 -Grid control

The Grid control  is a new element that can be inserted into PSNext forms. A grid defines columns and rows that will display content to the user for read and write, such as spreadsheets do.

The power of the grid control relies on the fact that it can display information of different categories within the same sheet. The grid can loop on a given PSNext category (such as a report can do) to present an easy way to read and edit fields values within the same place.

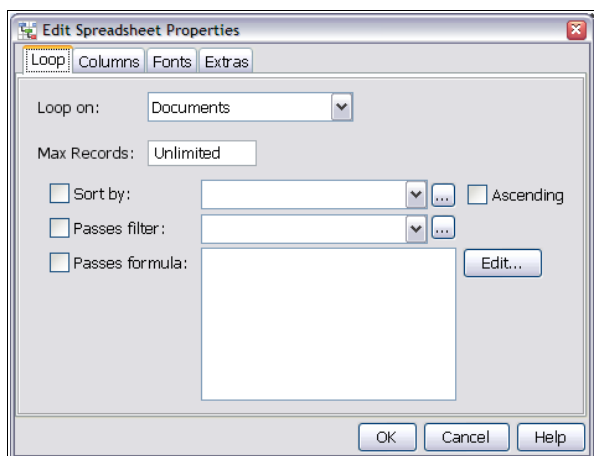


Fig 5. The Grid control, as a text report loops on a category

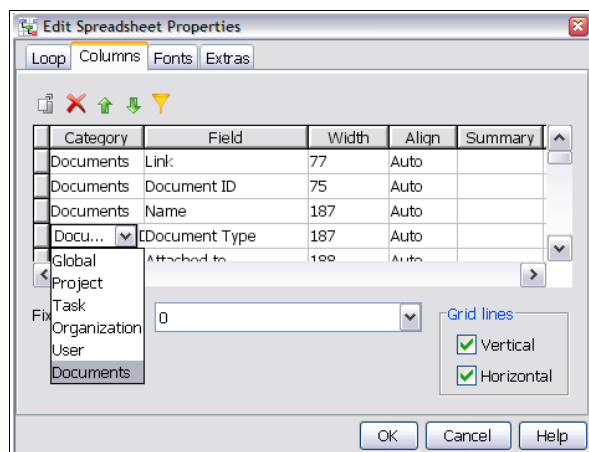


Fig 6. A grid can mix fields of multiple categories

All the related categories that can be referenced by the main category in the Grid loops are available in the “Category” column of the “Columns” tab.

When fields are edited directly within a Grid, changes are saved according to the relationship in between the Form's owner and the base loop used by the Grid.

For instance a Document Grid within a task form will commit changes immediately on the document, however for a task grid within a project changes will be committed on project save.

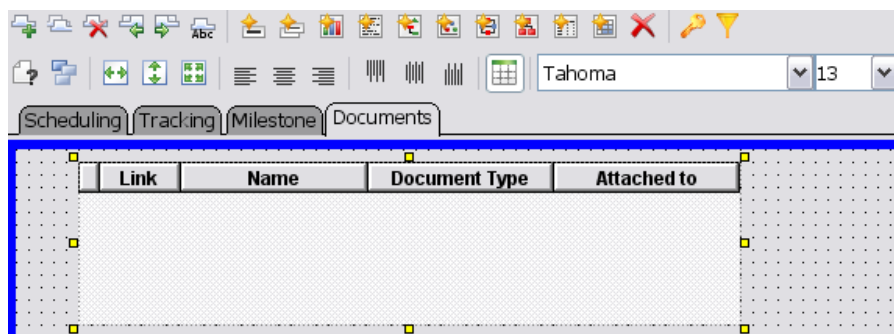



Fig 7. Preview of a Grid Control within a Task form tab

C -Views Management

Previous versions of PSNext allowed users to split the screen into two views in the Planner component.

To improve the user's graphic and ergonomic experience, PSNext 3.0's Portfolio Control, Planner and Resource components can display more than two views at a time in the user's work space. Views are now managed as windows that can be resized or moved.

1 -The View Control

The View control (View/View Control...)  is available in the Portfolio Control, Planner and Resources components. It lists all the available views and forms of the component and allows the user to choose those that can be displayed in the current workspace.

It is possible to display as many views as needed as well as independent tab forms.

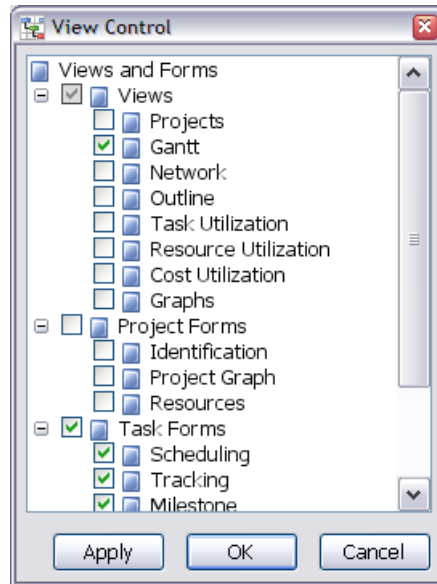


Fig 8. The View Control of the Planner

2 -Dockable windows

The views and forms of the Portfolio Control, Planner and Resources components are now displayed as windows, allowing users to easily rearrange their positions and sizes.

Any window can be closed, maximized, restored, moved, or converted into a tab.

Any window can be:

- Moved by clicking on the window's title, dragging it, and then dropping it in the desired location.
- Closed by clicking on the X icon in the top right corner
- Maximized by clicking on the squared icon in the top right corner or double clicking on its title bar (or tab name).
- Converted into a tab by placing it exactly on top of another window and dropping it or by dropping it on the name of any existing tab.

To change the content of a window click on its title and select the view to be displayed from the tool bar or from the View menu. Note that when the same view is displayed more than once, it is now possible to use different preferences in each instance of that view.

3 -Layouts

When carrying out a particular task in PSNext such as updating a project, scheduling resources or tracking budgets, users generally need to arrange the displayed views to retrieve the information they need. These settings can now be saved and managed through Layouts.

Layouts are a preferred working environment that specifies:

- the views and tabs to be displayed and their position
- the default preferences for undisplayed views, the tool bar and menu bar
- a set of filters to activate

Layouts are managed as preferences of the Portfolio Control, Planner, and Resources components. As with any preference, layouts can be created by an administrator for every user (Corporate Layouts) or by an individual user (User Layouts)

Layouts can be captured, applied and managed from the View/Layouts menu , the Layouts tool bar icon or from the Tools/Options Dialog box.

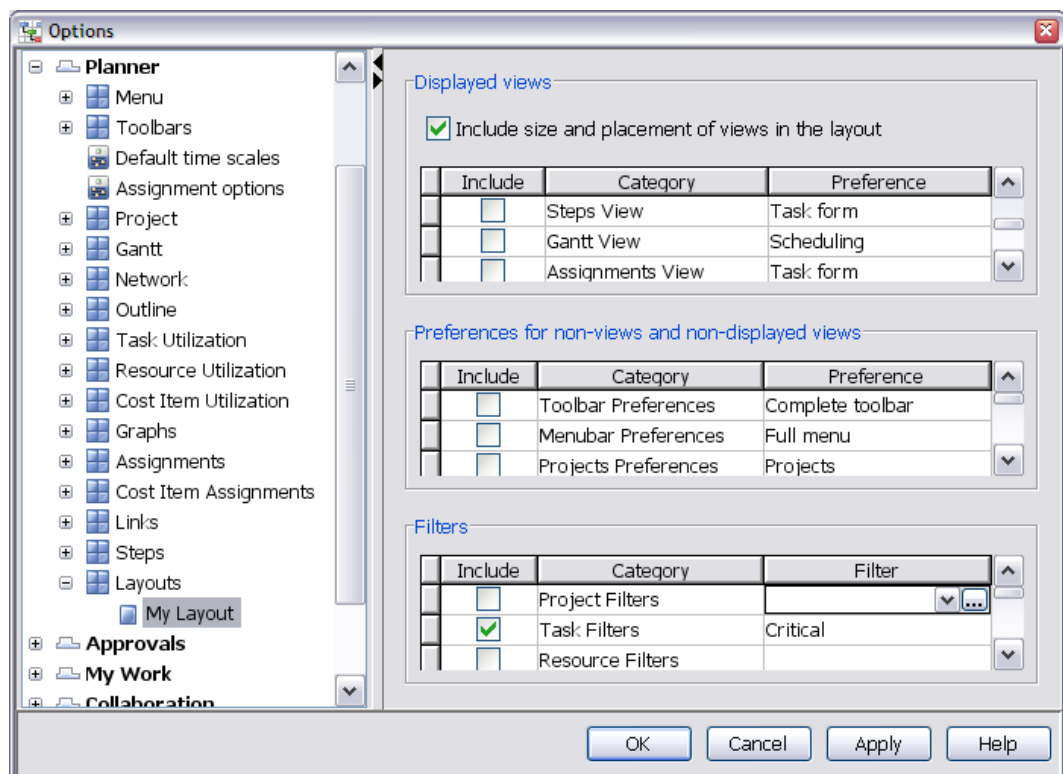


Fig 9. Layout properties from the Tools/Options... dialog box

DISPLAYED VIEWS CONFIGURATION	<p>Users can decide if size and position of currently displayed views and forms in the workspace should be included in the layout definition.</p> <p>Additionally, for each displayed view, users can specify the preference that should be applied by checking the “Include” column”. If the “Include” column remains unchecked the view will be displayed with the last preference it used.</p>
ACTIVE PREFERENCES CONFIGURATION	<p>Sets the default preferences for any view that is not displayed when the layout is applied. The default tool bar and menu preferences can be set here too.</p>
ACTIVE FILTERS CONFIGURATION	<p>Filters to activate as soon as the layout is applied. The correspondent “Filter ON” icons will be displayed when applying a Layout containing filtering options active.</p>

D -Corporate Preferences

The Corporate preferences are common preferences available to every PSNext user. Some of these preferences though may have been relevant to a given user according to their profile and the actions they carried out in PSNext.

Within large companies, administrators required a way to define small sets of corporate preferences so that only the relevant preferences were provided to a given user profile.

1 -Preference Sets

PSNext 3.0 enhances the Corporate Preferences definition by using Sets. Instead of creating a single list of the preferences that should be considered as Corporate, Administrators can now create Corporate Preference Sets and select the preferences that will belong to each set.

PSNext provides 64 built-in sets (Set 1, Set 2, Set 3, etc.) in the Corporate Preferences view of the System component.

Each set can be renamed by using the Set corporate alias tool in the Tools menu.

Name	Set 1	Set 2	Set 3
Planner			
Menu			
Full menu (Active)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Toolbars			
Complete toolbar (Active)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Project			
Projects (Active)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Gantt			
Gantt - All projects (Active)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gantt - Selected project	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Scheduling	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Network:			
Network: (Active)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Fig 10 Corporate Preference Sets

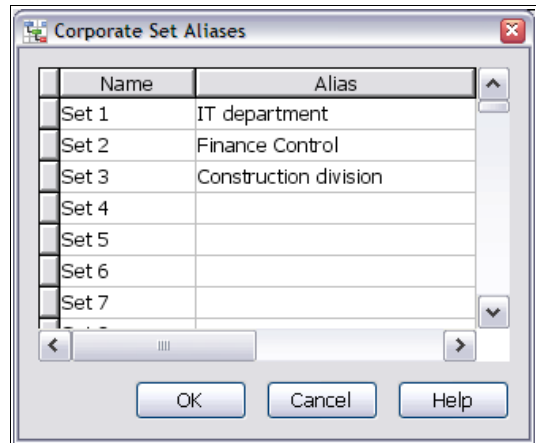


Fig 11. Renaming a built-in set

2 -Define a user's set of preferences

Administrators can then define the Corporate Preference set that will be used by each organization branch. All the users belonging to that branch will be provided with the defined set of corporate preferences.

Name	Corporate Preference Set
Vintage Corporation	IT department
Construction department	Construction division
Finances	Finance Control
IT department	IT department
Marketing	Set 4
Projects	Set 4
Quality Control	Set 4

Fig 12 Defining the Corporate Preference Set of an Organization

The Set definition can be overridden at the user level by using the Corporate Preference Set field of the Users category.

Resources								Cost Items		Portfolio Control		Project Control		Planner		Approvals		My Work		Collaboration		Reports		Users				
?																							Domain Tokens:		10000		Used Token	
Last Name		First Name		Name		Corporate Preference Set		Organization		Access Rights Role		Resources																
Geer		John		Geer, John				Finances		Custom		<input type="checkbox"/>																
Hardt		Tom		Hardt, Tom		Construction division		R&D		Custom		<input type="checkbox"/>																
Lacey		Anna		Lacey, Anna				Quality Control		Custom		<input type="checkbox"/>																
Nguyen		Jean		Nguyen, Jean				R&D		No Rights		<input type="checkbox"/>																
Oakley		Louise		Oakley, Louise				Marketing		No Rights		<input type="checkbox"/>																

Fig 13. Override the Organization's Preference Set