

Columns:

Working with Columns

Purpose: Add, remove, modify, create, and group columns.

Perspective: "Project Manager Gantt Chart"

In this tutorial, we will use the Project Manager Gantt Chart perspective and go through the steps in this. However, these principles apply in most perspectives.

This tutorial explores:

1.1 Moving and sizing columns

1.2 Right click column menu

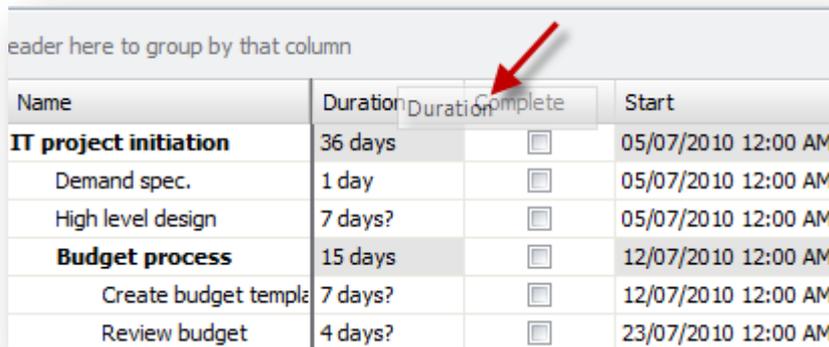
1.3 Column chooser

1.4 Grouping

1.5 Calculated Columns

1.6 Regular Expressions Advanced Searching

1.1 Moving & sizing columns: Columns can be customized, moved, added, removed, and grouped.

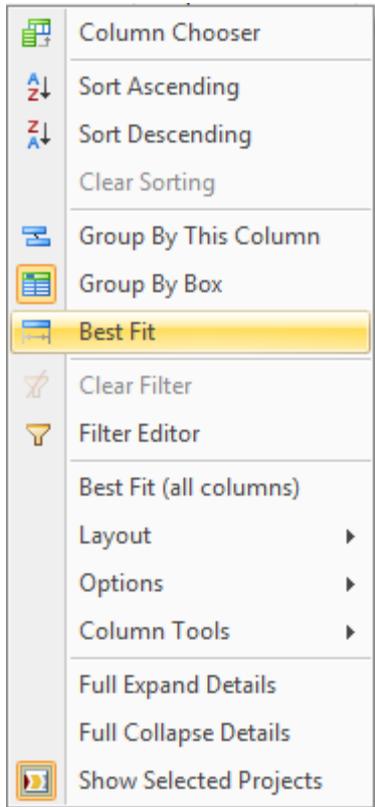


Header here to group by that column

Name	Duration	Complete	Start
IT project initiation	36 days	<input type="checkbox"/>	05/07/2010 12:00 AM
Demand spec.	1 day	<input type="checkbox"/>	05/07/2010 12:00 AM
High level design	7 days?	<input type="checkbox"/>	05/07/2010 12:00 AM
Budget process	15 days	<input type="checkbox"/>	12/07/2010 12:00 AM
Create budget template	7 days?	<input type="checkbox"/>	12/07/2010 12:00 AM
Review budget	4 days?	<input type="checkbox"/>	23/07/2010 12:00 AM

To move a column, left click and hold, and drag and drop it into the place you'd like to be, in front, or behind, another column.

1.2 Right click column menu



We'll take a look at the menu options for columns:

Sort Ascending sorts from first to last, such as from A-Z, alphabetically.

Sort Descending sorts from last to first, such as Z-A, alphabetically.

About Sorting: When you sort columns, you will see a small arrow appear in the column header: `Department` . You can click on the column header to change from sorting by Ascending to Descending (up or down arrow). You can clear column sorting by right clicking on the column header and selecting "Clear Sorting". Column sorting can be applied to multiple columns; if you want to first organize by Department and then organize by person name, you can do that by sorting Department then sorting Name. Columns will clear individually when you select "Clear Sorting".

Group By This Column allows you to group information by that column, we'll explore this more in the next point.

Group By Box – This shows or hides the area above the columns

where the grouping occurs.

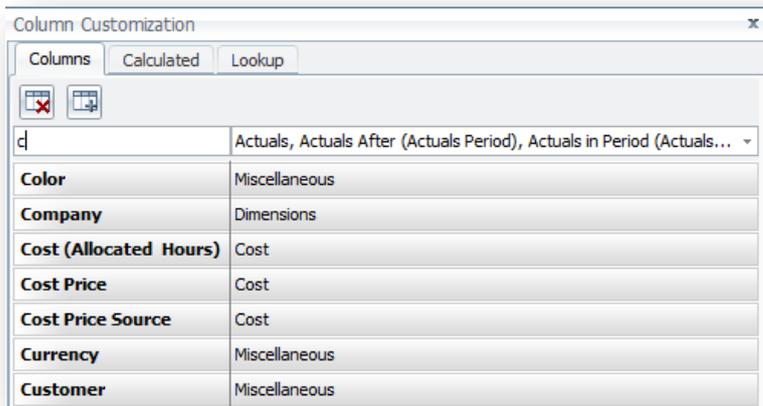
Best Fit changes the width of the column that has been right-clicked on to be the best fit considering the data inside, it will expand to the width of the data.

Filter Editor is an advanced option to make your own filters.

Best Fit (all columns) changes the width of all columns to be the best fit.

1.3 Column chooser

To add a column, right click on any column, and select Column Chooser. *Note that the column you right click on will determine where the column goes, the new column will always go to the right of the column you clicked on to access the column chooser.*



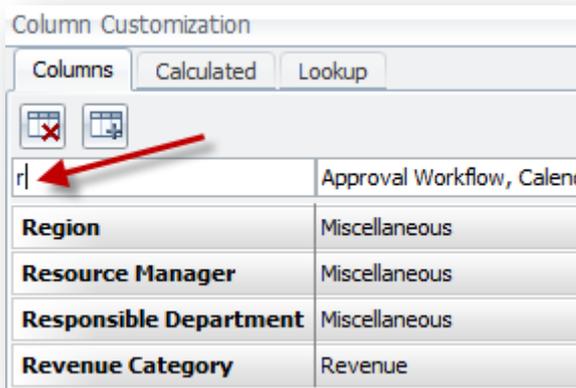
To add a new column (and have it appear after the column you right clicked on to access the column chooser) double click on the column name. To add a new column in a specific place, drag the column name from the column chooser to a spot in the column grid that you want it to be placed in.

1.4 Grouping

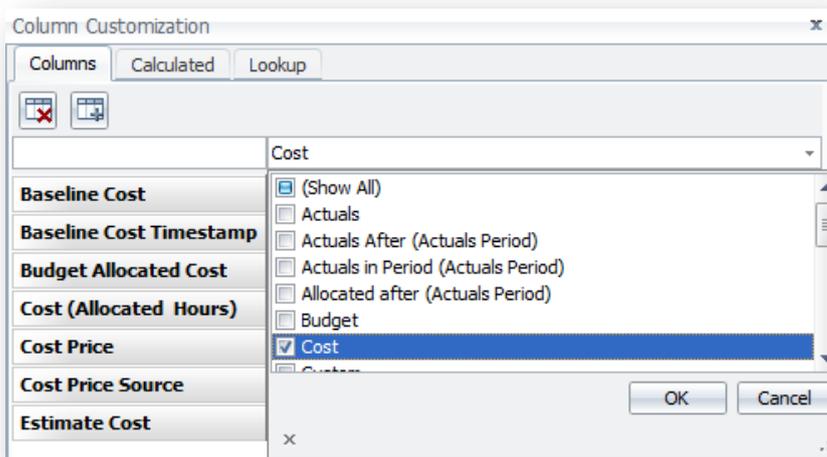
You can also group by column immediately by dragging the column name up to the upper area of the column grid, and placing it there directly. You can also group by right clicking on the column and selecting "Group by this Column". This action groups all below information by that column. You can also group columns by dragging a column name directly up to the area above the column headers to group by that column. To ungroup, right click on the grouped header (below, Department in the grouping area above the rest of the columns) and select "Clear Grouping", or drag it off the grid completely, which removes the column from the column grid. In the below example, we group by Department to see which people are within which departments.

	Name	Department	Work Week Ho	Common Calen	Employee Categ
+ Department: [1]					
- Department: Management Consulting [3]					
▶	Hugo M	Management Consulting	Normal 37	DK General calendar	Consultant
▶	Nils M	Management Consulting	Normal 37	DK General calendar	Project Manager
	Peter M	Management Consulting	Normal 37	DK General calendar	Resource Manager
+ Department: SW Development [8]					

In the Column Chooser, you can search for columns by entering part of the column name, such as in the above example, by typing the first letter or few letters of the name of the column and the results will filter accordingly. (See end of this document for more advanced searching, using Regular Expressions).

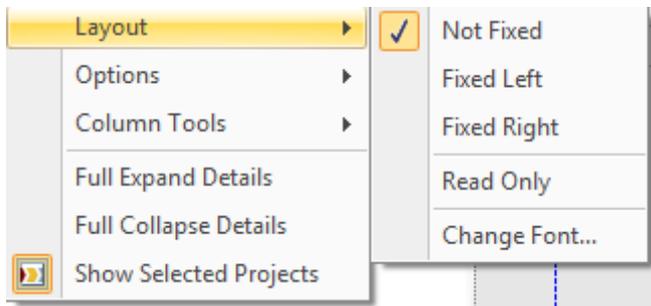


You can also only show specific column types. For example, if you only want columns associated to cost, select the drop down menu on the right, and uncheck all using the “Show All” button on or off, then select cost. Only columns associated to cost will be present in the list.



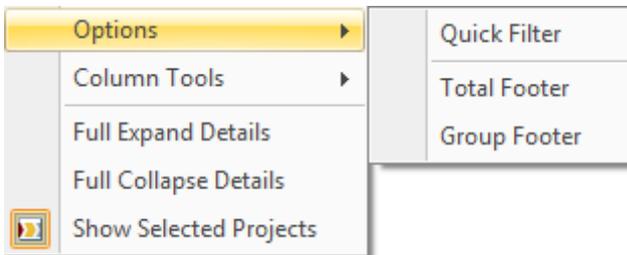
Two buttons are above the column choices  . These are for removing all columns in the current view, or to add all columns shown in the column chooser. If you remove all columns, you are left with a blank grid. If you add columns shown in the column chooser, then those columns would be added to the existing columns in your grid. In this example, we may want to add all the ‘cost’ columns to our grid. The column grid would then look like this, with all the cost columns inserted into the grid:

	Name	Baseline Co	Baseline Co	Budget Allo	Cost (Alloc	Cost Price	Cost Price	Estimate C	Duration
>	- IT project initiation	0.0		0.0	136.5	0.0	EmployeeCate	0.0	36 days
	Demand spec.	0.0		0.0	0.0	0.0	EmployeeCate	0.0	1 day
	High level design	0.0		0.0	0.0	0.0	EmployeeCate	0.0	7 days?
	- Budget process	0.0		0.0	18.0	0.0	EmployeeCate	0.0	15 days
	Create budget templa	0.0		0.0	5.5	0.0	EmployeeCate	0.0	7 days?
	Review budget	0.0		0.0	7.5	0.0	EmployeeCate	0.0	4 days?
	- Development plan	0.0		0.0	9.0	0.0	EmployeeCate	0.0	7 days
	Assign needed people	0.0		0.0	9.0	0.0	EmployeeCate	0.0	7 days?
	- Development phase 1	0.0		0.0	54.5	0.0	EmployeeCate	0.0	7 days?
	Meet with stakeholde	0.0		0.0	2.0	0.0	EmployeeCate	0.0	7 days?
	- Development phase 2	0.0		0.0	24.0	0.0	EmployeeCate	0.0	1 day?
	Developers meeting	0.0		0.0	4.0	0.0	EmployeeCate	0.0	1 day?
	Prepare presentation	0.0		0.0	16.0	0.0	EmployeeCate	0.0	5 days?
	Investment decision	0.0		0.0	15.0	0.0	EmployeeCate	0.0	7 days?

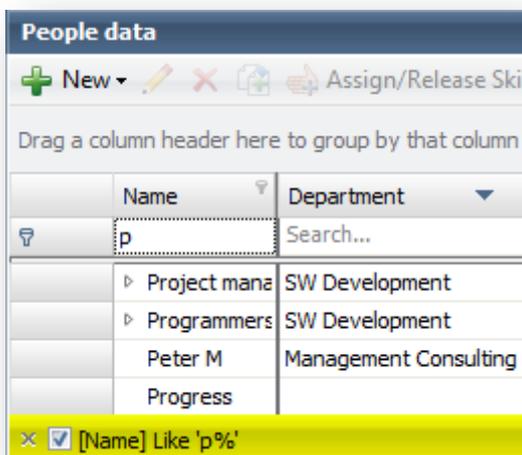


Layout has five options: **Not Fixed** means the column can be moved. **Fixed Left** means the column stays on the left side of the grid. **Fixed Right** means the column stays on the right side of the grid. **Read only** means that this column cannot be modified. **Change Font** changes the font of the grid rows.

Options has three options:



Quick Filter is a way to add a search / filter box on any column.



Here you can see the quick filter line highlighted. As an example, you could filter for all people whose names begin with P, either by typing “p” as the first letter of his name. A footer appears at the bottom of the Perspective, showing what is being filtered. You may uncheck to disable or select the “x” to remove the filter. Note that the quick filter shows up on every column when enabled.

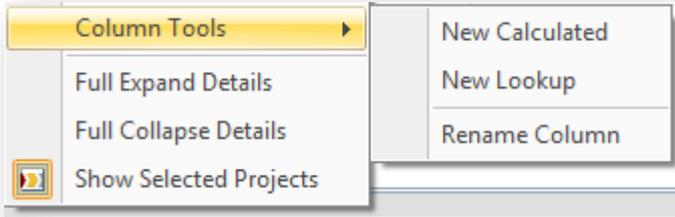
Name	Department	Work Week
Oli H	SW Development	Parttime
Jan B	SW Development	Normal 37
Casper R	SW Development	Overtime
Tony R	SW Development	Normal 37
Hugo M	Management Consulting	Normal 37
Lillian G	SW Development	Normal 37
Nils M	Management Consulting	Normal 37
Vanessa C	SW Development	Overtime
Peter M	Management Consulting	Normal 37
Programmers	SW Development	40 normal
Project mane	SW Development	5 normal
Progress		Normal 37

Total Footer gives totals for the entire column. In the People Data perspective, we can easily count how many resources we have by putting a total footer on the Name column, and selecting “Count” as our footer value.

Name	Department	Work Week Ho	Common Calen	Cost
Department: [1]				
Department: Management Consulting [3]				
Hugo M	Management Consulting	Normal 37	DK General calendar	0.5
Nils M	Management Consulting	Normal 37	DK General calendar	0.5
Peter M	Management Consulting	Normal 37	DK General calendar	0.5
AVG=.5				
Department: SW Development [8]				
AVG=.5				

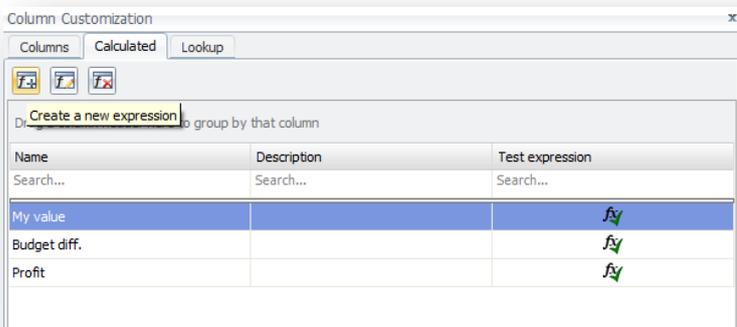
Group Footer shows summaries for information that is grouped. For example, if we group on Department, and then show the average cost per department, we can easily see how much each department costs on average.

Column Tools has three options: New Calculated, New Lookup and Rename Column.



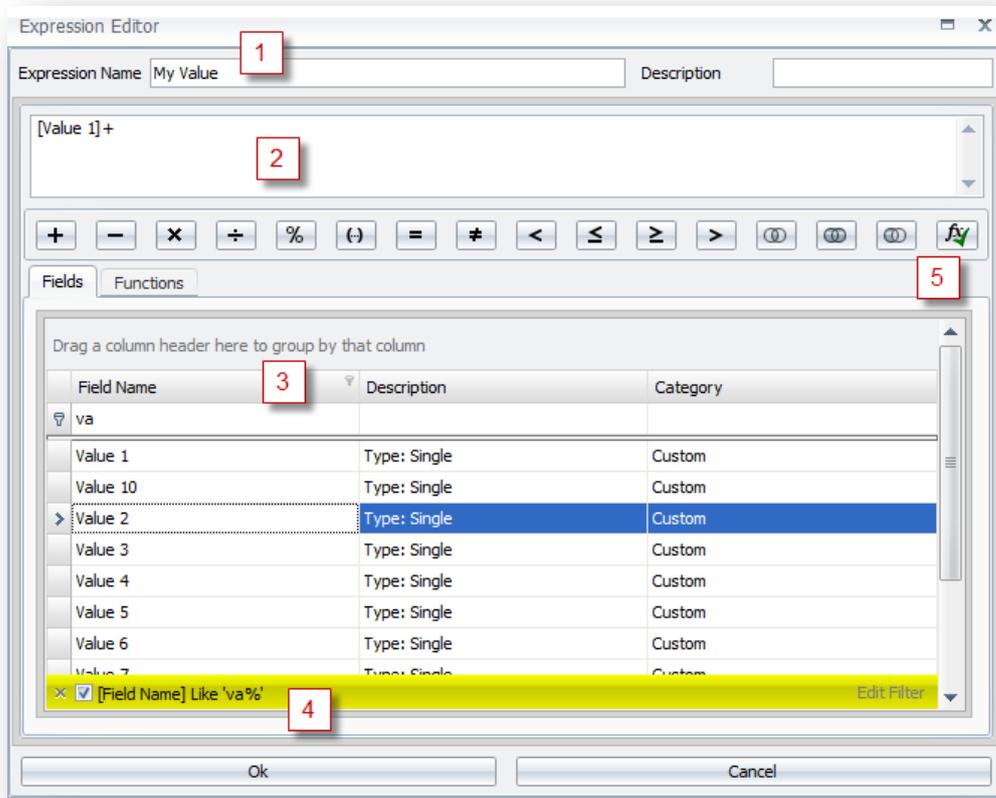
New Calculated creates a new column that you define by creating a calculation. A very simple example of this might be if you want to add two values together and have the result show up in a column. You can create a new calculated column

in two ways. Either by selecting it from the right click menu as above, or using the column chooser, and selecting **Create a new expression** from the Calculated tab.



1.5 Calculated Columns

To create a new calculated column, you must create an expression. An expression is a mathematical expression that can be calculated.



1 is where you name your expression, here we call it "My Value". 2 is where the expression is written, you can also type directly in this field if you know what your expression will contain. 3 is where you select the fields that you want your value to consist of. For this example, you can see that I've filtered for field names that start with "VA" which you can see in the filter line (4). I know I need values because I want two columns to add up together from what I type in.

Above 3, you can see a line of symbols, select these to insert them in (2) the expression area, I have already added the field "Value 1" plus the symbol for addition, "+".

When you have completed your expression (I'll add the field "Value 2" to complete it) then click on 5, the 'test' button to make sure it makes sense.

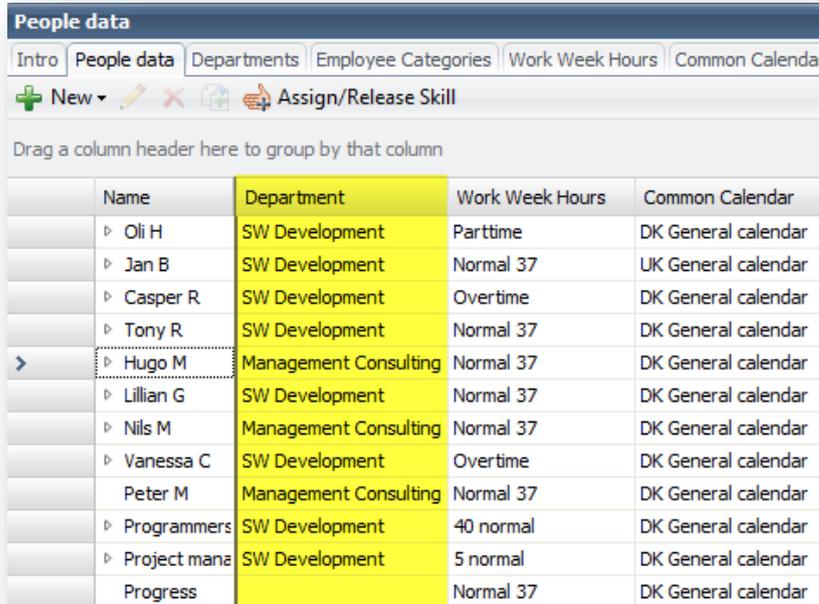
In this example, before you can try out your expression you must add the columns "Value 1" and

Duration	Compleat	Value 1	Value 2	My Value
36 days	<input type="checkbox"/>	5.0	10.0	15.0
1 day	<input type="checkbox"/>	5.2	6.3	11.5
7 days?	<input type="checkbox"/>	0.0	0.0	0.0
15 days	<input type="checkbox"/>	0.0	0.0	0.0
7 days?	<input type="checkbox"/>	0.0	0.0	0.0
4 days?	<input type="checkbox"/>	0.0	0.0	0.0
7 days	<input type="checkbox"/>	0.0	0.0	0.0
7 days?	<input type="checkbox"/>	0.0	0.0	0.0

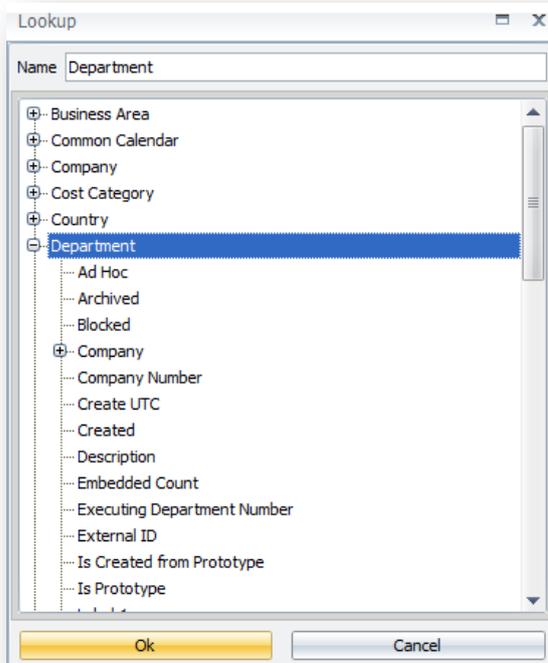
"Value 2" to your column grid. Use the column chooser to add those two columns. Your "My Value" column should be to the right of them. Then you can try entering values to get the results in "My Value". In another case, perhaps calculating hours, or another known variable, you would not have to add the

columns as MPI would take the existing data from those columns to generate the result.

New Lookup is a way to see additional information about columns. For example, if we are looking at the People Data perspective, we can see which Departments every person works in:



Name	Department	Work Week Hours	Common Calendar
▶ Oli H	SW Development	Parttime	DK General calendar
▶ Jan B	SW Development	Normal 37	UK General calendar
▶ Casper R	SW Development	Overtime	DK General calendar
▶ Tony R	SW Development	Normal 37	DK General calendar
▶ Hugo M	Management Consulting	Normal 37	DK General calendar
▶ Lillian G	SW Development	Normal 37	DK General calendar
▶ Nils M	Management Consulting	Normal 37	DK General calendar
▶ Vanessa C	SW Development	Overtime	DK General calendar
Peter M	Management Consulting	Normal 37	DK General calendar
▶ Programmers	SW Development	40 normal	DK General calendar
▶ Project mana	SW Development	5 normal	DK General calendar
Progress		Normal 37	DK General calendar



We can use New Lookup column to add additional information on to that. In this case, the Department column has more information that we might be able to use. Right click on the Department column and select “New Lookup”.

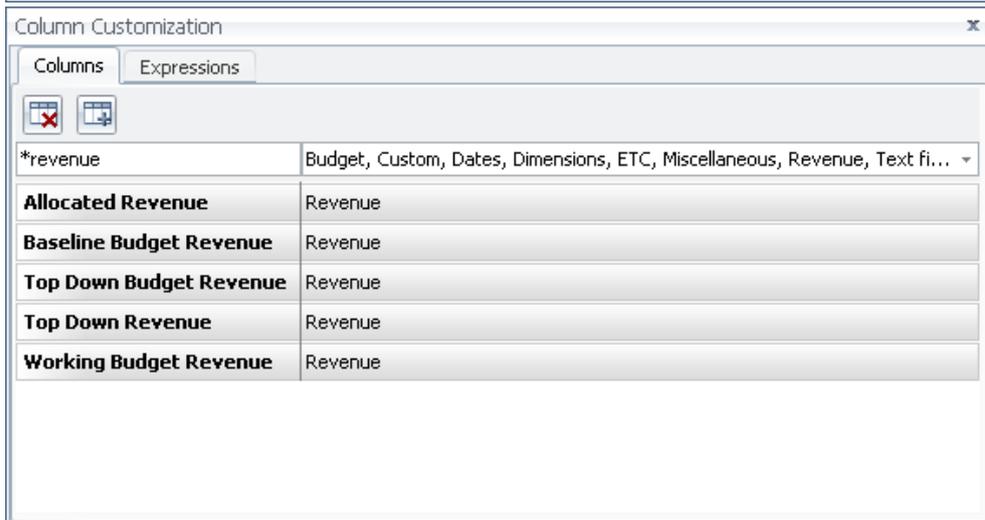
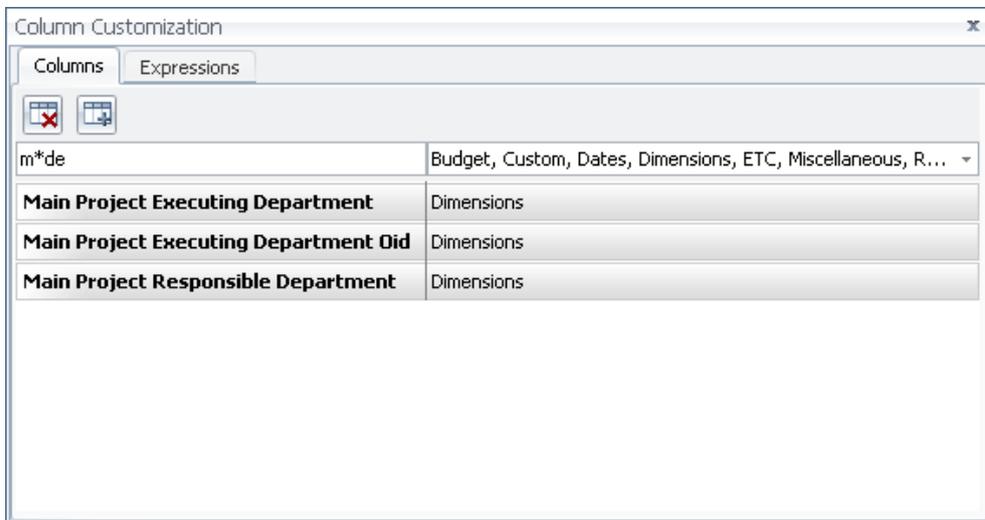
Here you can see that “Company” is a part of the Department information. By selecting “Company” we add it to the columns and we can see which company each person works for. Another example might be adding “Customer Number” to the “Customer” column.

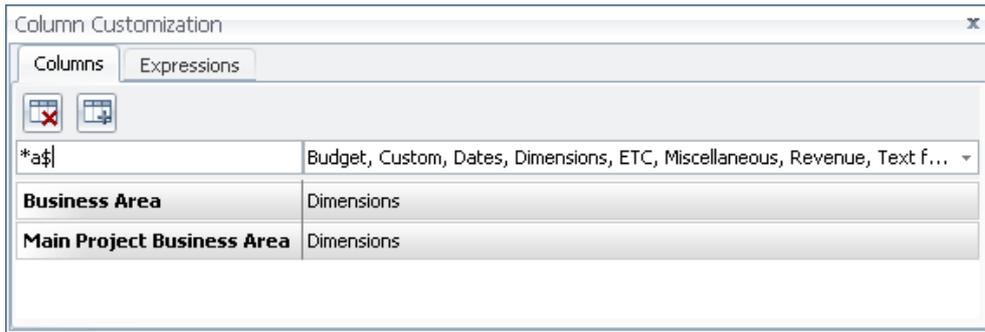
Name	Department	Department Company
▶ Oli H	SW Development	Planning SW Inc.
▶ Jan B	SW Development	Planning SW Inc.
▶ Casper R	SW Development	Planning SW Inc.
▶ Tony R	SW Development	Planning SW Inc.
▶ Hugo M	Management Consulting	Consulting Inc.
▶ Lillian G	SW Development	Planning SW Inc.

The final option, **Rename Column** allows you to give the column a custom name.

1.6 Regular Expressions Advanced Searching:

For a bit more advanced searching, an asterix (*) and a dollar sign (\$) can be used as is shown in these pictures:





The asterix (*) means “everything” and the dollar sign (\$) means “end of text”. In the first picture only items beginning with “m” and then having any letters but containing “de” therein are shown. In the second picture all items containing “revenue” somewhere are shown. In the third picture All items ending with “a” are shown.

The underlying search relies on regular expressions.

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