Working with Column Sets

Definitions

Work Portfolio: Within Planview, a Portfolio refers to a user-defined set of projects and programs to be viewed in a single view. Users create portfolios according to their viewing needs. Portfolios in Planview need not correspond to strategic portfolios as defined at VUMC.

Column Set: Refers to a filtered view of select columns of work or resource data available in Planview. Users may select a predefined column set or create and save their own column sets, depending on which data columns are useful.

Icons in this job aid

Steps

Changing Column Sets can be done from several views in Planview, including Work Portfolio Dashboard view, Resource Portfolio Dashboard view, and from Work and Resource Management view of an individual project. This job aid will show the Work Portfolio Dashboard view, but the functionality below is the same any time the Column Set button is viewable.

Open Predefined Column Set

2. Click Work to open the Work menu.
3. Show Work Portfolios, select the work portfolio you want to open, then choose Portfolio View as your action.

For additional support, please visit the EPMO Website.
Working with Column Sets

4. Unless you have already changed your available tiles in the Portfolio view, you will see the Portfolio Manager (Dashboard) tile, with the number of active projects in that work portfolio. Below this tile is the Column Set button, which lists the current Column Set in use.

5. Click the Column Set button to select a different option from the drop-down list. Scroll down to find the Column Set you need.

Choosing a different column set will not automatically affect any project data. You can switch among them until you find one that meets your needs. Some of the most useful predefined column sets are:

00. Gantt Chart – to see an overview of project timelines
01. Project – Build Schedule – to view/enter scheduled start/finish dates
03. Project – Track Progress – to view/enter actual start/finish dates
WBS by Task Owner – to recall who is assigned to each task in the WBS

For additional support, please visit the EPMO Website.
Working with Column Sets

Create New Column Set

1. If you cannot find a predefined Column Set that meets your needs, you can click + New to create your own.

2. The New Column Set window opens. Type a unique name for the set in the Column Set Name field.

By default, your column set will be created in Portfolio Manager and Work and Resource Management, both of which are in use at VUMC.

For additional support, please visit the EPMO Website.
Working with Column Sets

3. Scroll down the list of Available Columns on the left. If you want to add a column to your Column Set, highlight it on the left and click the Add button.

4. Continue adding columns as needed. Once you have selected all the columns, you can change the order in which they appear by clicking the up/down buttons on the right. The top column in the Selected Columns list appears the farthest left on your screen.

5. Click Save.

Column Sets created by you are only viewable by you. If you create a great one that you think should be made widely available to all users, please email the EPMO.

For additional support, please visit the EPMO Website.