

ProjectSuite Enterprise Edition (PSEE)

Search Profile & Dashboard Management

1

Purpose

- Search Profile Management and the Dashboard go hand in hand.
- Allows users to save searches they perform over and over. Quarter, Weekly, Etc
- Saved searches are
 - dynamic. As project's criteria change the search results update.
 - Project Searches NOT Module Searches
- Saved search = Dashboard tab.
- Only 1 default dashboard.



2

Common Searches

- "This fiscal year lettings".
 - When saved this saved search will be different on June 30th and July 1st. Why? Because the Fiscal year changed.
- "Projects currently assigned to John Smith".
 - This list will change every time John Smith is added to or removed from project as the Project Manager.
- "Projects in a Specific Area of the district".
 - This list is used by many offices who divide work by counties, field offices or East/West of district.

3

Open User Profile

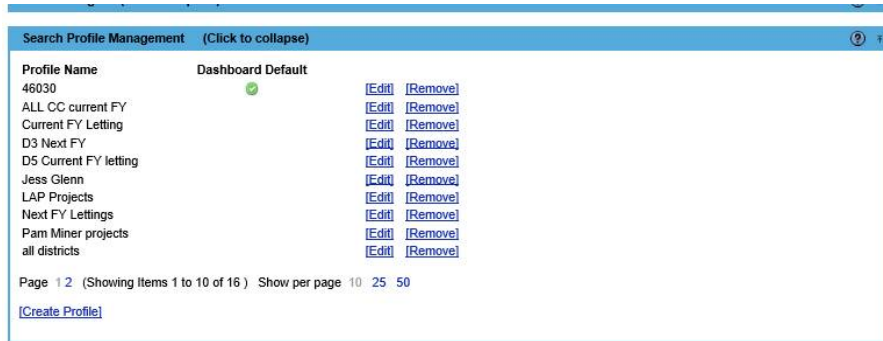
Select the person icon
next to your name
located in the top right
corner of the application.


User: Erica Hewett 

4

Create a Profile

- Click create profile

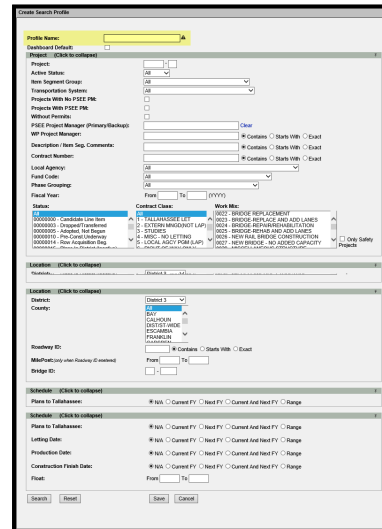


5

Create a Profile

- Give the search a unique name
- Select the filter criteria.
- Save the Search

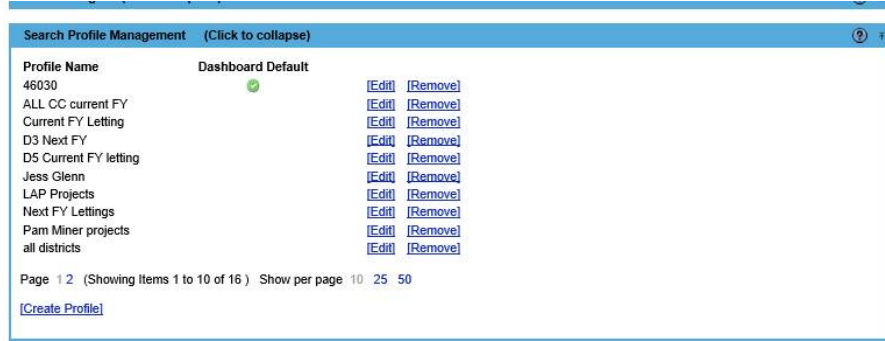
It is a good practice to run the search before saving. This helps confirm the filter criteria was selected correctly.



6

Edit / Remove Search Profiles

- Edit – Needs modification
 - Click Edit to Opens the search filter options
- Remove – No longer needed
 - Click the Remove link from list



7

My Dashboard

- Unlimited Dashboards
- 2 kinds of tabs:
 - Standard View
 - Search Profiles

Rank	Local Name	Status	Letting	Contract Start	Schedule Complete	Dist	Contact Cost	Work Item	County	ESCEM	Open	Close
1	27390-2 SR 3824 NATIONSON BLVD FROM S.	BIDS RECE.	6/15/2022			3	1	902 RESURFACING	BAV	Ray Thomas	0	N
2	37866-4 SR 144 SR 80 OVER BAYVIEW TR.	CONTRACT	6/16/2022			3	7	902 BRIDGE - PAVING	ESCAMBA	TRACY GARRA	0	N
3	22454-9 SR 389 US 316 FROM NORTH OF	AWARDED	5/20/2022			3	7	1070 LANDSCAPING	WAKULLA	Pamela Mene	0	N
4	23895-4 DISTRICT 3 SCHOOL ZONE IMPLEM.	UNDER CON.	1/30/2022			3	1	901 SAFETY PROJECT	DISTRICT	Eric Wells	0	N
5	22270-3 SR 8 (I-10) OVER CROCKETT BRGE	UNDER CON.	10/14/2021			3	7	904 BRIDGE-REPAIR/REHABILIT.	GADSDEN	Michael Foster	0	N
6	48252-5 SR 8 (I-10) OVER SPANISHWATER	CONST COM.	8/15/2021			3	7	902 BRIDGE - PAVING	GRADY	Anthony Webb	0	Y
7	41694-4 SR 373 GULF COAST PARKWAY PROJ.	BIDS RECE.	6/15/2022			-114	1	902 NEW ROAD CONSTRUCTION	BAV	Dean Mitchell	0	N
8	47966-2 SR 18 (SR 90) OAKLAND RIDGE INV.	AWARDED	5/26/2022			3	7	904 BRIDGE REPAIR/REHABILIT.	LEON	Anthony Webb	0	N
9	41412-2 SR 35 (SR 80) FROM SANDPORT RD.	AWARDED	4/14/2022			3	7	1070 LANDSCAPING	OKALOSA	Pamela Mene	0	N
10	41947-2 SR 38 (SR 80) BROOKS BRIDGE N.	AWARDED	5/4/2022			3	9	902 BRIDGE REPLACEMENT	OKALOSA	Eric Siggler	0	N
11	41572-9 SR 383 CAPITAL CIRCLE FROM GR.	BIDS RECE.	6/15/2022			3	1	6213 ADD LANES & RECONSTRUCT	LEON	Clay Hunter	0	N
12	42167-2 SR 65 (SR 65) FROM BUS OVER PISA	CONST COM.	1/13/2022			3	7	904 BRIDGE REPAIR/REHABILIT.	OKALOSA	Robert Thomas	0	N
13	42171-2 SR 2 (SR 2) AND LAKEHOLM AVENUE	CONST COM.	8/15/2021			3	7	904 BRIDGE REPAIR/REHABILIT.	CLAYTON	Laura Moore	0	N
14	42687-3 SR 18 (SR 80) FROM SR 377 VDR.	CONTRACT	4/27/2022			3	1	902 RESURFACING	WASHINGTON	Travis Justice	0	N
15	42552-1 SR 285 (SR 140) FROM SAVOUL D.	CONTRACT	4/27/2022			3	1	902 RESURFACING	ESCAMBA	Hanna Arnett	0	N
16	42558-1 SR 107 FROM SR 222 TO SR 600 PM.	CONTRACT	4/27/2022			3	1	902 RESURFACING	OKALOSA	Michael Holger	0	N
17	41077-1 SR 394 MOHAWK AVE FROM SR 1.	UNDER CON.	1/16/2021			3	1	1035 SIDEWALK	ESCAMBA	David Ficker	2	V
18	42037-2 CR 206 SAULEY FIELD FROM NAUS.	UNDER CON.	12/8/2021			3	1	6225 SIDEWALK	ESCAMBA	David Ficker	0	V
19	42097-2 SR 8 (I-10) OVER ELEVENHALE	AWARDED	5/26/2022			3	7	904 BRIDGE REPAIR/REHABILIT.	ESCAMBA	Robert Thomas	0	N
20	42067-1 SR 105 (SR 20) PERSHING BLVD.	UNDER CON.	10/27/2021			3	1	902 RESURFACING	ESCAMBA	George Hale	0	N



8

Dashboard Tab Types

- Standard View
 - can not be deleted.
 - list the last 5 projects you have accessed
 - any active project where you are assigned as the PSEE PM or PSEE Backup PM.

- Search Profile
 - Each profile a separate tab on the dashboard.
 - Edited from the dashboard
 - Can be set as default dashboard.



9

Dashboard Management

- Edit Dashboard
 - All Search Profile Tabs
 - Click the pencil icon.
 - Search box will appear for editing
 - Click the star to set as Default Dashboard

- Add New Dashboard
 - Last tab appears
 - Click the green circle
 - Search filter box will open.
 - Same steps as how to Create Profile.



10

Dashboard Management

- Export Dashboard
 - Export list to an excel file.
 - The limitation is only 500 rows of data at a time
 - *For example, if you dashboard has 600 rows, you will need to export rows 1-500 then rows 501-600.*
 - Select the Export Results link
 - Excel file will open containing up to 500 results

Project	Local Name	Status	Letting	Construction	Schedule	Float	Contract	Work	County	PSEE PM	Open	Core
1	217096-2 SR 30A HUTCHISON BLVD FROM S.	BIDS RECE.	6/15/2022			0	1	0112 RESURFACING	BAV	Ray Hodges	0	N
2	218898-4 SR 18A (S 90) OVER BAYOU TEX.	CONTRACT	4/16/2022			0	7	0825 BRIDGE, PAINTING	ESCAMBIA	TIMOTHY BARNAL	0	N
28	4346-1-1 SR 95 (US 26) PENSACOLA BLVD.	UNDER CON.	10/27/2021			0	1	0612 RESURFACING	ESCAMBIA	Georgina Ack	0	N

11



If you have any questions or issues, contact the District 3 PSEE Admins listed at the bottom of the ProjectSuite application

12