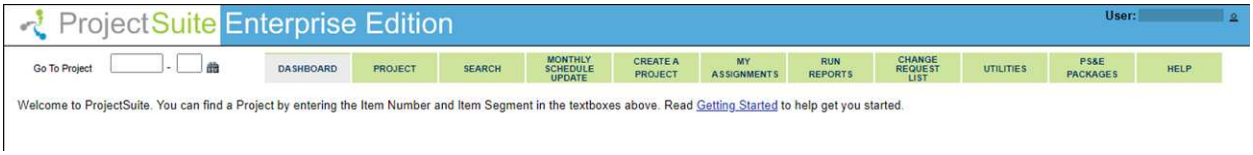
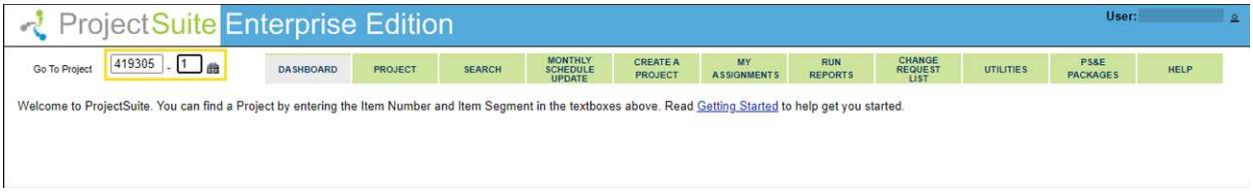
Getting Started With ProjectSuite Enterprise Edition (PSEE)

When accessing ProjectSuite for the first time, you will see a screen similar to the one below. There are no details to view yet, however, entering a Financial Project ID will allow you to begin viewing Project details.

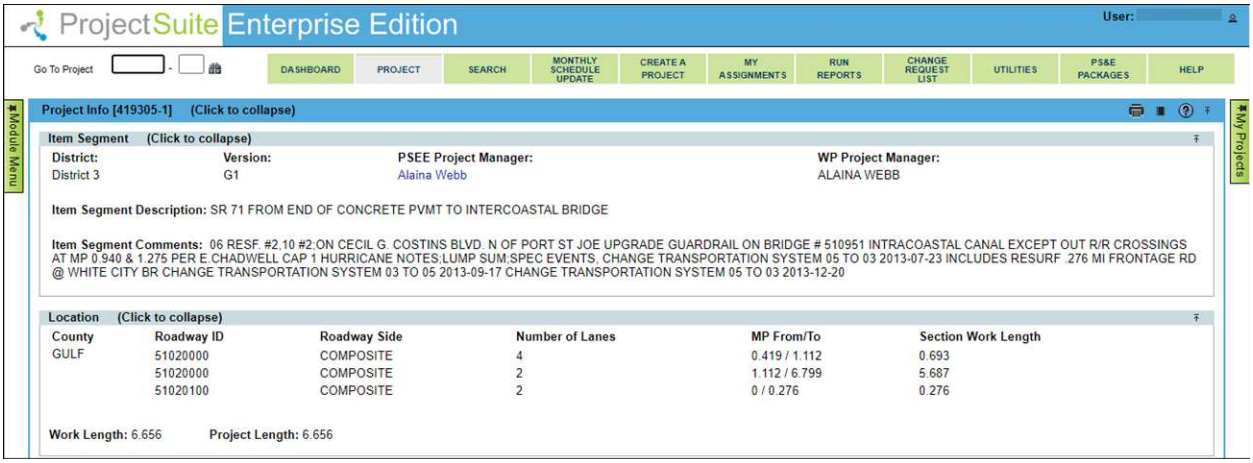


To select a Project to view

1. Type the Item Number into the first section in the **Go To Project** box.
2. Type the Item Segment number into the second section in the **Go To Project** box.
3. Press **Enter** or **Select** the binocular icon to locate the Project.



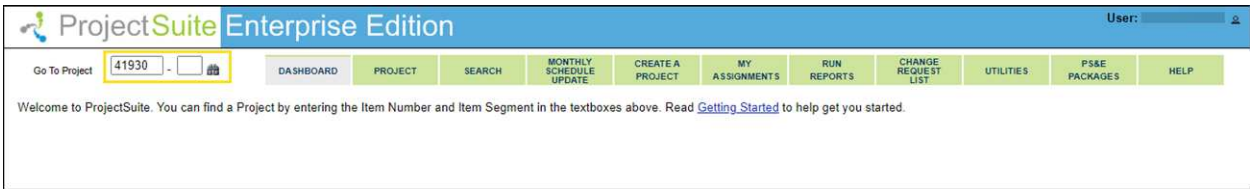
4. The details that are available for the Project will be displayed. By default, you will be shown the **Project** details.



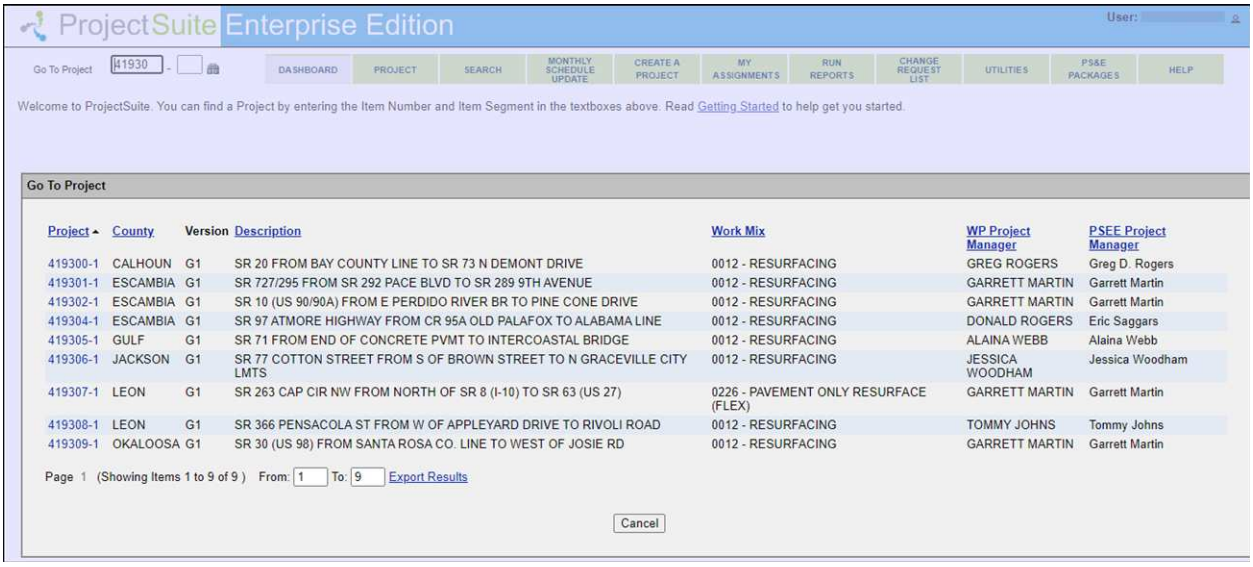
Searching for Partial Project Numbers

You may also search for a partial Project Number. PSEE will present you with a list of all Projects that contain the partial number you have entered.

1. Type the partial Item Number into the first section in the **Go To Project** box.
2. Press **Enter** or **Select** the binocular icon to locate the Project.



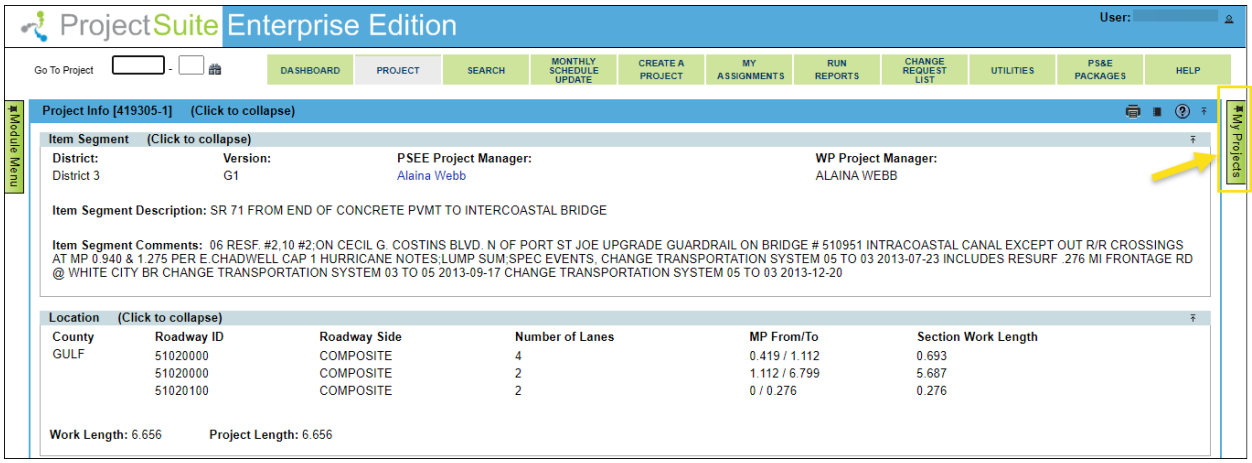
3. A list of Projects that include your number will be returned. Click on the hyperlinked Project Number when you see the needed Project.



The My Projects Menu

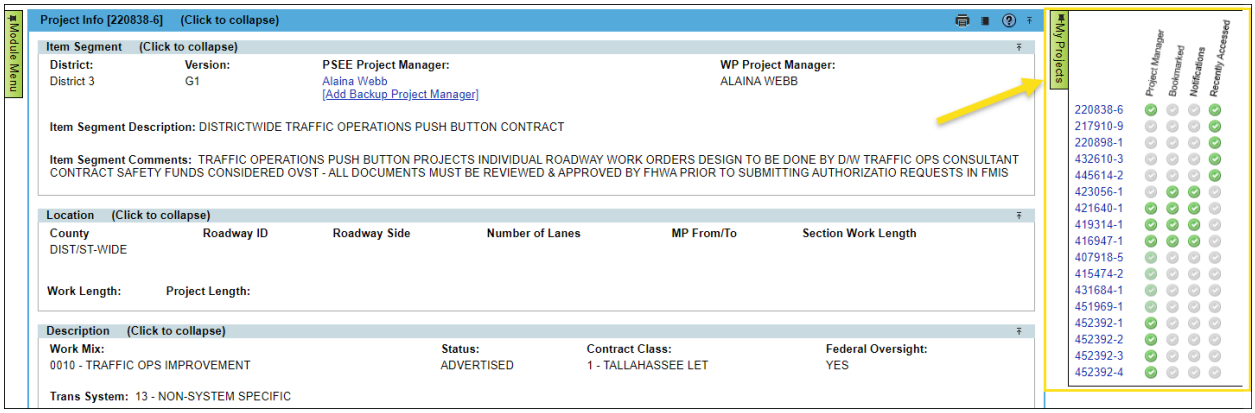
The My Projects section allows you to quickly configure information related to Projects of interest.

To view the My Projects information, hover over the My Projects tab that is available on the right side of the screen. A section will expand that lists Projects of interest.



The Projects that you have visited in PSEE are listed in My Projects. To move to a Project on the list click the hyperlinked Project Number. The My Projects list includes:

- Project Manager – Any Projects that list you as the PSEE Project Manager.
- Bookmarked - Any Projects that you have bookmarked.
- Notifications – Any Projects that indicates you would like to receive email notifications.
- Recently Accessed – Any Projects that you have recently accessed. PSEE will automatically highlight the last five Projects you have accessed in this list.



Bookmarking a Project

You can always use the Go To Project section to navigate to Projects you are interested in, but you can also use the My Projects section to bookmark, and then return to, frequently used Projects. Bookmarking a Project will ensure it is not removed from the Recently Accessed Projects list.

1. Click into the Bookmarked column next to the Project Number. The grey check will turn green to indicate it is bookmarked.

2. To remove a Bookmark select the same Bookmarked column. The green check will become grey again to indicate it is no longer bookmarked.

Notifications

You may also use the My Projects list to indicate that you would like to receive email notifications on the listed Project.

1. Click into the Notifications column next to the Project Number. The grey check will turn green to indicate that you will now receive Notifications for that Project.

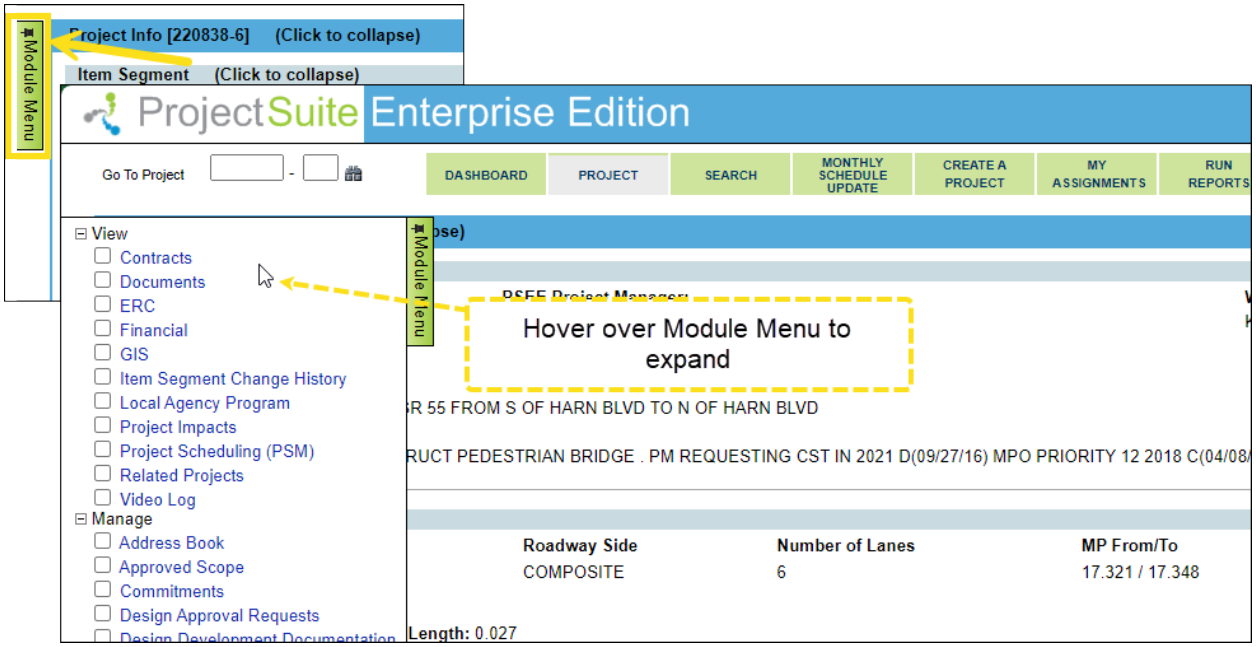
2. To stop receiving Notifications on a Project select the same Notifications column. The green check will become grey again to indicate you will no longer receive Notifications for that Project.

***NOTE**: There are many email notifications that are generated by ProjectSuite. You must let ProjectSuite know which of these notifications you would like to receive. Go to User Profile, Privileges and Notifications to select the email notifications you would like to receive. More information is available in the [User Profile Privileges and Notifications] help document.*

The Module Menu

The Module Menu lets you control which parts of Project Suite (referred to as Business Areas and Business Modules) are displayed. By default, the Module Menu is collapsed, and can be

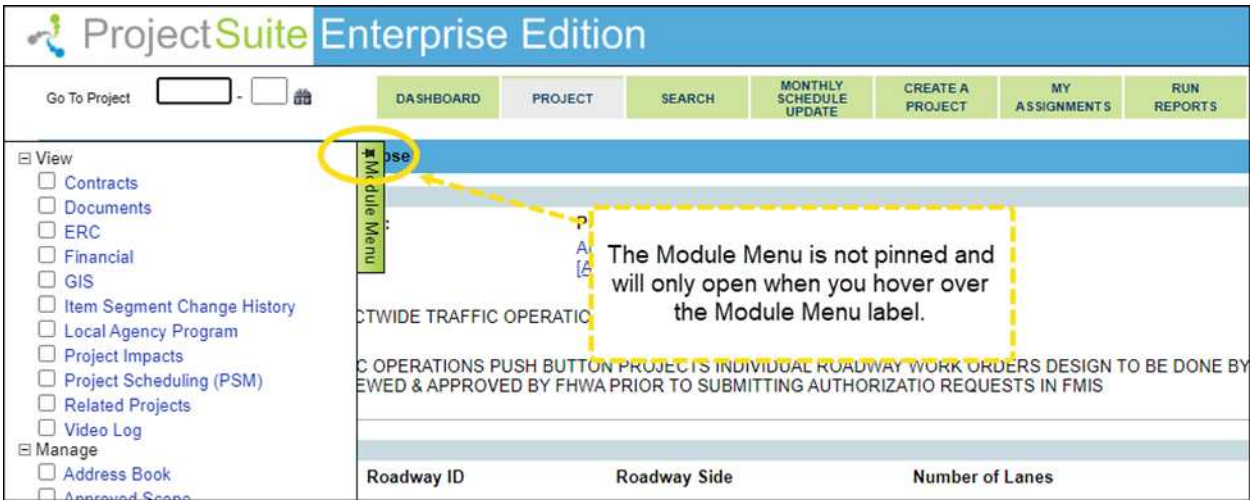
seen by moving your cursor over the Module Menu label to expand the details. Users can choose to make this Menu viewable at all times by "pinning" the Module Menu open.



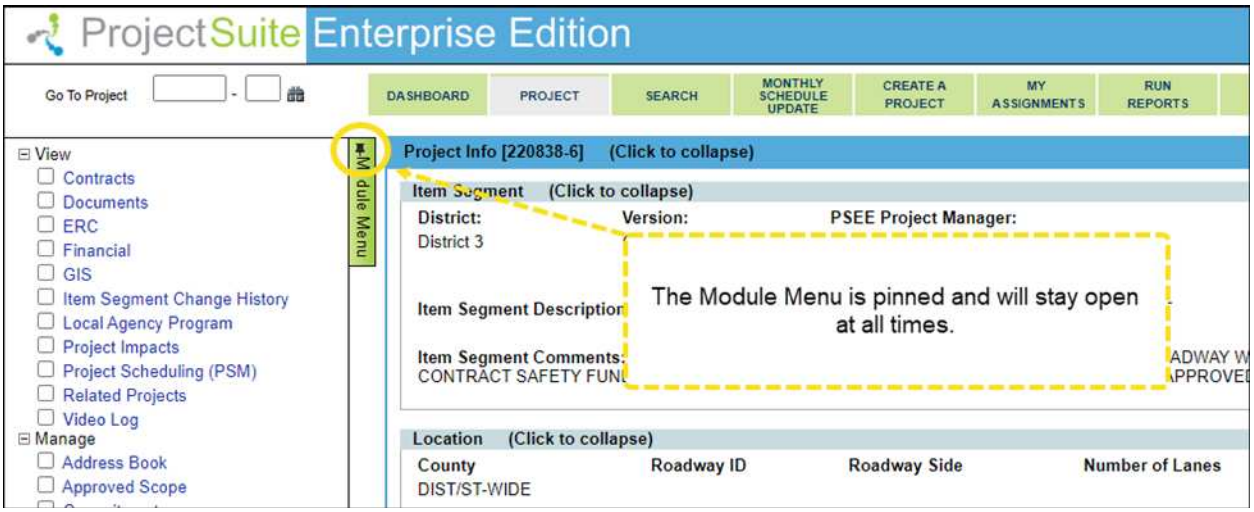
Pinning the Module Menu

The Module Menu can be configured to be viewable at all times OR it can be collapsed and expanded by hovering over the section. Having the Module Menu collapsible gives you more space to view your Project information.

1. If the push pin is left-pointing, the menu is not pinned and will open only when you hover your mouse over the Module Menu.



2. If the push pin is downward pointing, the menu is “pinned” and will remain open at all times.



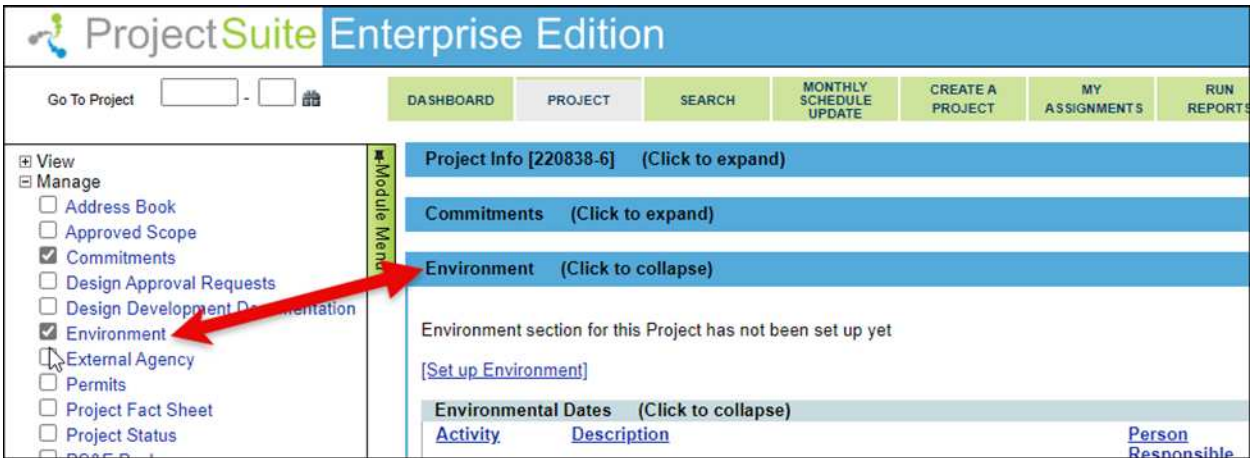
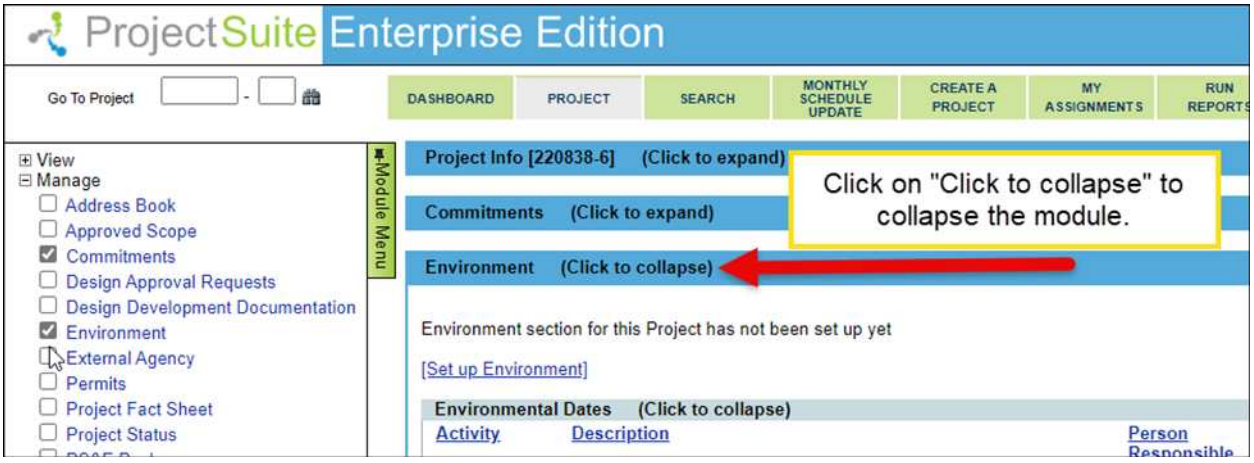
3. To switch between “pinned” and “un-pinned” simply click on the green Module Menu label.

Using the Module Menu to View PSEE Business Areas and Business Modules

The Module Menu lists the parts of PSEE that are available to you.

1. To view a Business Module, select the check box to the left of the Business Module name.

2. The screen will refresh and the selected module will display.



3. You may collapse and expand a module by clicking on the module name header.