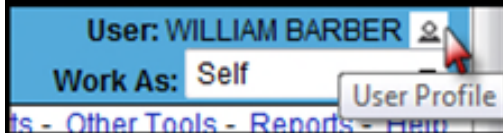


## User Profile – Search Profile Management

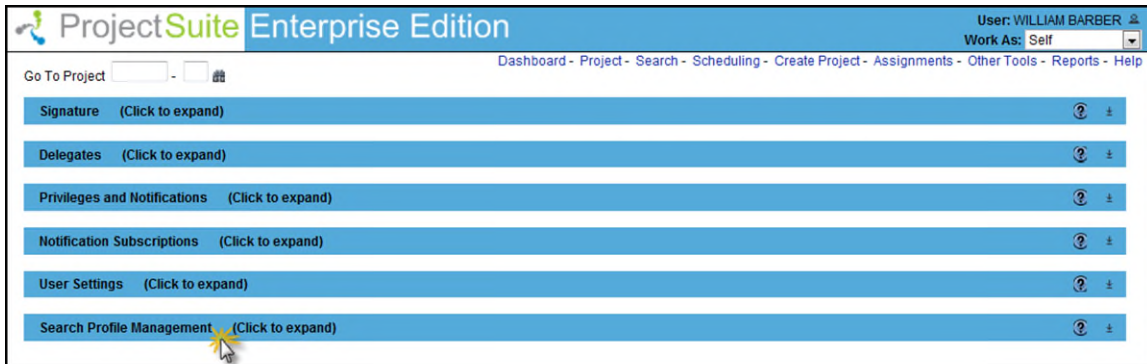
The Search Profile Management section of your User Profile allows

- Creation of Named Profiles using Search Criteria
- Selection of a Profile to be the Dashboard Default

1. Select the User Profile icon beside your name in the upper right hand corner.



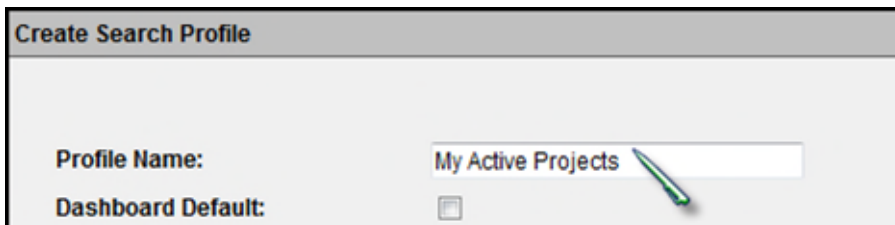
2. On the User Profile page, select the **Search Profile Management** header to expand that section.



3. Click on the **Create Profile** hyperlink.



4. The Create Search Profile window will appear. If the Search criteria are going to be used again to filter a set of projects for viewing in PSEE, then enter a Profile Name. The Profile Name can be entered later after reviewing the Search results. Also, there is a check box to make this Search Profile the Dashboard Default.



5. Also part of the Create Search Profile window, are many values that can be populated to narrow your Project Search. For more information on these values, please read the [Project Search Help Document](#). Enter the selection criteria and click on the **Search** button. To clear the Search criteria, click on the Reset button.

**Project (Click to collapse)**

Project:  -

PSEE Project Manager:  [Clear](#)

Projects With No PSEE PM:

WP Project Manager:   Contains  Starts With  Exact

Local Name / Limits / Item Seg. Comments:   Contains  Starts With  Exact

Contract Number:   Contains  Starts With  Exact

Local Agency:

Fund Code:

Status:

Contract Class:

Work Mix:

**Location (Click to collapse)**

District:

County:

Roadway ID:   Contains  Starts With  Exact

Bridge ID:  -

**Schedule (Click to collapse)**

Plans to Tallahassee:  N/A  Current FY  Next FY  Range

Letting Date:  N/A  Current FY  Next FY  Range

Production Date:  N/A  Current FY  Next FY  Range

Construction Finish Date:  N/A  Current FY  Next FY  Range

Float: From  To

## Reviewing Search Profile Results

1. Project Search results are provided in a list displayed in order by Project Number. The Profile Name and Dashboard Default check box can be updated.
2. The Search results can be sorted by column headings. Click on a hyperlinked column header to sort by that column. An upward pointing triangle beside a column indicates the results

are sorted by that column, in ascending order. A downward pointing triangle indicates the results are sorted in descending order.

The screenshot shows the 'Create Search Profile' window. At the top, there is a '[Modify Search]' link. Below it, the 'Profile Name' is 'My Active Projects' and 'Dashboard Default' is unchecked. There are 'Save' and 'Cancel' buttons. Below the buttons is a 'Project Search Results' section with a '(Click to collapse)' link. The results are displayed in a table with columns: Project, County, Version, Description, Bridges, Work Mix, WP Project Manager, and PSEE Project Manager. The 'County' column has a downward-pointing triangle, indicating ascending sort order. A red arrow points to this triangle with the text 'These projects are sorted in ascending order.' The table shows two rows of results. At the bottom of the table, there is a pagination bar: 'Page 1 (Showing Items 1 to 2 of 2) Show per page 10 25 50 From: 1 To: 2 Export Results'.

Project	County	Version	Description	Bridges	Work Mix	WP Project Manager	PSEE Project Manager
220663-4	WALTON	AD	SR 83 (US 331) FROM NEW ALIGN OWL'S HEAD TO N NOKUSE PLANTATION		0213 - ADD LANES & RECONSTRUCT	WILLIAM BARBER	WILLIAM BARBER
416940-1	ESCAMBIA	AD	SR 10 (US 90A) 9 MI FROM W OF PINE CONE DRIVE TO ESCAMBIA RIVER BRIDGE	48-0920	0012 - RESURFACING	WILLIAM BARBER	WILLIAM BARBER

- To edit the Search results, select the Modify Search hyperlink and update your Search criteria as needed.

The screenshot shows the 'Create Search Profile' window. The '[Modify Search]' link is highlighted with a mouse cursor. The 'Profile Name' is 'My Active Projects' and 'Dashboard Default' is unchecked. There are 'Save' and 'Cancel' buttons.

- Search results can be exported to a downloadable Excel spreadsheet by clicking the Export Results hyperlink at the bottom of the list. The "From" and "To" fields let you specify the range of entries to be exported.

The screenshot shows a close-up of the pagination bar. The 'From: 1 To: 6' fields are highlighted with a red box. The 'Export Results' link is also visible.

## Managing Search Profile Results

1. If the Search criteria will be used again in the future to display a list of Projects, then enter a unique Profile Name. If it is the Search criteria that you will want to see each time you access PSEE, then select the Dashboard Default check box. Select the Save button to preserve the Profile Name.

**Create Search Profile**

[\[Modify Search\]](#)

**Profile Name:**

**Dashboard Default:**

2. The Profile Names will be displayed under the Search Profile Management.

Profile Name	Dashboard Default		
Construction Projects	<input checked="" type="checkbox"/>	<a href="#">[Edit]</a>	<a href="#">[Remove]</a>
My Active Projects	<input type="checkbox"/>	<a href="#">[Edit]</a>	<a href="#">[Remove]</a>

Page 1 (Showing Items 1 to 2 of 2) Show per page 10 25 50

[\[Create Profile\]](#)

3. Select Edit to set a new Dashboard Default or change the Profile Name.

Profile Name	Dashboard Default		
Construction Projects	<input checked="" type="checkbox"/>	<a href="#">[Edit]</a>	<a href="#">[Remove]</a>
My Active Projects	<input type="checkbox"/>	<a href="#">[Edit]</a>	<a href="#">[Remove]</a>

Page 1 (Showing Items 1 to 2 of 2) Show per page 10 25 50

[\[Create Profile\]](#)

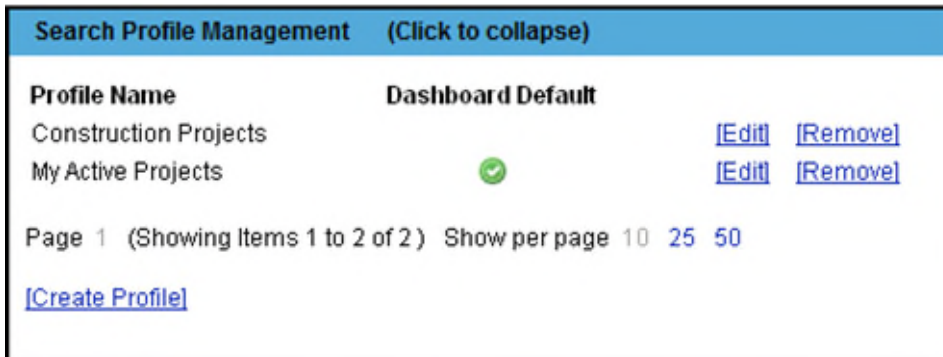
4. Make changes and select the Save button.

**Modify Search Profile**

**Profile Name:**

**Dashboard Default:**

5. There can be only one Dashboard Default at a time.



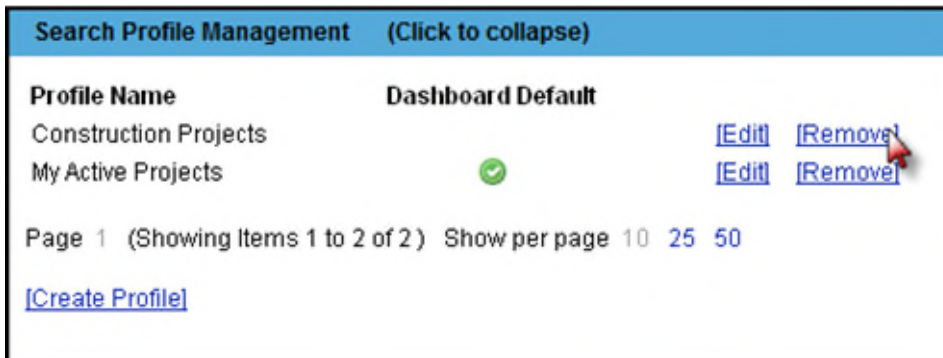
**Search Profile Management** (Click to collapse)

Profile Name	Dashboard Default		
Construction Projects		<a href="#">[Edit]</a>	<a href="#">[Remove]</a>
My Active Projects	✓	<a href="#">[Edit]</a>	<a href="#">[Remove]</a>

Page 1 (Showing Items 1 to 2 of 2) Show per page 10 25 50

[\[Create Profile\]](#)

6. If a named Profile is no longer needed, select the Remove hyperlink.



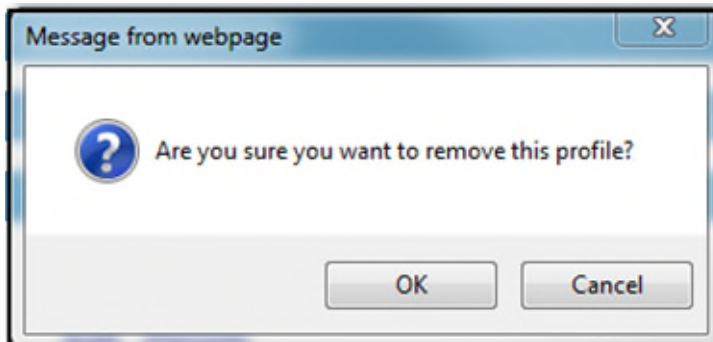
**Search Profile Management** (Click to collapse)

Profile Name	Dashboard Default		
Construction Projects		<a href="#">[Edit]</a>	<a href="#">[Remove]</a>
My Active Projects	✓	<a href="#">[Edit]</a>	<a href="#">[Remove]</a>

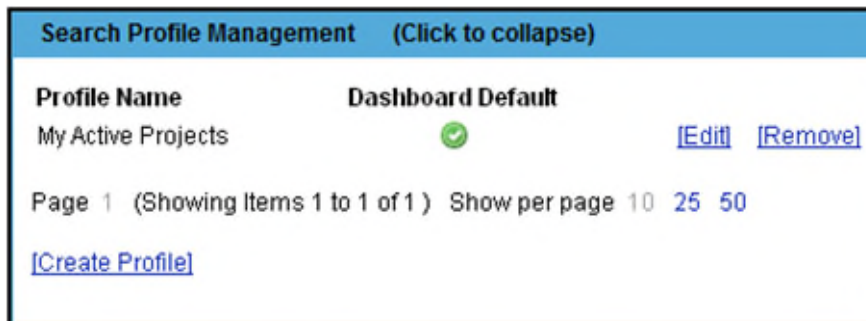
Page 1 (Showing Items 1 to 2 of 2) Show per page 10 25 50

[\[Create Profile\]](#)

7. Click OK to confirm removal.



8. The Profile is removed.



**Search Profile Management** (Click to collapse)

Profile Name	Dashboard Default		
My Active Projects	✓	<a href="#">[Edit]</a>	<a href="#">[Remove]</a>

Page 1 (Showing Items 1 to 1 of 1) Show per page 10 25 50

[\[Create Profile\]](#)

### Search Profile Default on the Dashboard

When accessing the Dashboard, the PSEE user will see the five most recently accessed projects, bookmarked projects or any project for which the user is a PSEE Project Manager.

The Standard View – No Profile Selected screen is displayed to the PSEE user when accessing PSEE with no Default Search Profile set. The screen displays the five most recently accessed projects, bookmarked projects or any project for which the user is a PSEE Project Manager.

ProjectSuite Enterprise Edition User: MADAN ARORA

Go To Project [ ] [ ]

Dashboard - Project - Search - Create Project - Assignments - Reports - Help

**Dashboard**

You currently have no Search Profiles set up. These can be used to customize the list of Projects shown on your Dashboard. [\[Create Profile\]](#)

Project	Local Name	Status	Letting	Construction Finish	Schedule Condition	Float	Contract Class	Work Mix	County	PSEE PM	Open Statuses	Goes With
190015-1	TRAINING PROGRAM TRANSPORTATION MANAGEMENT SEMINAR	LINE ITEM COMPLETED			☀	0	5		DIST/ST-WIDE		0	N
208373-2	SR 10 (US 90 WEST) FROM BROWN ROAD TO WEST OF LAKE CITY AVE	ADVERTISED	06/20/2012	01/01/2014	☀	0	1	0213-ADD LANES & RECONSTRUCT	COLUMBIA	CHRISTOPHER DICKS	0	Y
209659-5	SR 23 (BRANNON FIELD CHAFEE RD) FROM 103RD ST TO S OF I-10	CONST.COMPLETE		08/01/2007 A	☀	0	1	0002-NEW ROAD CONSTRUCTION	DUVAL		0	Y
217976-2	SR 30 (US 98) @ COLLEGE DRID AVENUE INTERSECTIONS	CONST.COMPLETE		10/11/2009 A	☀	0	1	0232-INTERSECTION (NEW)	BAY	DEAN MITCHELL	0	Y
404525-1	SR 426 FROM MITCHELL HAMMOCK RD TO PNE ST	CONST.COMPLETE	03/31/2010		☀	0	1	0213-ADD LANES & RECONSTRUCT	SEMINOLE	SARAH VANGUNDY	0	Y

☀ Float greater than or equal to 0    ☀ Float less than 0 and greater than or equal to -20    ☀ Float less than -20

Page 1 (Showing items 1 to 5 of 5) Show per page 10 25 50 From: 1 To: 5 [Export Results](#)

A user can create a customized Search Profile through the **Create Profile** hyperlink. Once Search Profiles are created, the user can choose from a dropdown, which profile he wants to access/view.

ProjectSuite Enterprise Edition User: MADAN ARORA

Go To Project [ ] [ ]

Dashboard - Project - Search - Create Project - Assignments - Reports - Help

**Dashboard**

View Profile: (Standard View - No Profile Selected) [\[Create Profile\]](#)  
 (Standard View - No Profile Selected)  
 Construction Projects  
 My Projects

Project	Local Name	Status	Letting	Construction Finish	Schedule Condition	Float	Contract Class	Work Mix	County	PSEE PM	Open Statuses	Goes With
195705-1	SR ROAD TO W OF I-75	COMPLETED	06/23/2004 A		☀	0	1	0213-ADD LANES & RECONSTRUCT	LEE	CHANG WANG	0	N
238395-4	SR 500 (US 441) FROM MARTIN LUTHER KING TO LAKE ELLA RD	UNDER CONSTRUCTION	10/31/2011		☀	0	1	0213-ADD LANES & RECONSTRUCT	LAKE	SARAH VANGUNDY	0	Y
238429-4	SR 50 FROM W OF HANCOCK ROAD 800' W. REMINGTON ROAD	CONST.COMPLETE	02/08/2013		☀	0	1	0213-ADD LANES & RECONSTRUCT	LAKE	DAVID COOKE	0	Y
249941-2	SR 823/NW 57 AVENUE FROM WEST 19 STREET TO WEST 23 STREET	CONST.COMPLETE	06/25/2009 A		☀	0	7	0213-ADD LANES & RECONSTRUCT	MIAMI-DADE	DANNY IGLESIAS	0	Y
404525-1	SR 426 FROM MITCHELL HAMMOCK RD TO PNE ST	CONST.COMPLETE	03/31/2010		☀	0	1	0213-ADD LANES & RECONSTRUCT	SEMINOLE	SARAH VANGUNDY	0	Y

☀ Float greater than or equal to 0    ☀ Float less than 0 and greater than or equal to -20    ☀ Float less than -20

Page 1 (Showing items 1 to 5 of 5) Show per page 10 25 50 From: 1 To: 5 [Export Results](#)

Once a desired profile is selected, the user is displayed with the customized dashboard.

ProjectSuite Enterprise Edition User: MADAN ARORA

Dashboard - Project - Search - Create Project - Assignments - Reports - Help

Go To Project

**Dashboard**

View Profile: My Projects [\[Update Profile\]](#) [\[Set as Default\]](#) [\[Create Profile\]](#)

Project	Local Name	Status	Letting	Construction Finish	Schedule Condition	Float	Contract Class	Work Mix	County	PSEE PM	Open Statuses	Goes With
217909-3	SR 77 FROM BAY COUNTY LINE TO NORTH OF CR 279	PRE-CONST UNDERWAY				0	1	9982-PRELM ENG FOR FUTURE CAPACITY	WASHINGTON	WILLIAM BARBER	0	Y
217909-7	SR 77 FROM 1 MI N WAUSAU CITY L TO S CR 276 CLAYTON ROAD	CANDIDATE LINE ITEM	07/18/2018	11/08/2018		-27	1	0213-ADD LANES & RECONSTRUCT	WASHINGTON	WILLIAM BARBER	0	Y
218605-2	SR 10 (US 90A) 9 MI FROM SR 297 PINE FOREST TO SR 95 (US 29)	PRE-CONST UNDERWAY				0	5	2000-RIGHT OF WAY - FUTURE CAPACITY	ESCAMBIA	WILLIAM BARBER	0	N
219881-2	SR 369 (US 319) FROM WAKULLA COUNTY LINE TO L.L WALLACE ROAD	PRE-CONST UNDERWAY				0	1	9982-PRELM ENG FOR FUTURE CAPACITY	LEON	WILLIAM BARBER	0	Y
220663-2	SR 83 (US 331) FROM NEW ALIGN OWL'S HEAD TO EDGEWOOD CIRCLE	ROW ACQUISITION BEG.				-47	1	2000-RIGHT OF WAY - FUTURE CAPACITY	WALTON	WILLIAM BARBER	0	Y
220663-4	SR 83 (US 331) FROM NEW ALIGN OWL'S HEAD TO N NOKUSE PLANTATION	UNDER CONSTRUCTION		01/25/2013		0	5	0213-ADD LANES & RECONSTRUCT	WALTON	WILLIAM BARBER	0	Y
220663-5	SR 83 (US 331) FROM N NOKUSE PLANTATION TO EDGEWOOD CIRCLE	PRE-CONST UNDERWAY		02/08/2013		0	5	0213-ADD LANES & RECONSTRUCT	WALTON	WILLIAM BARBER	0	Y
220773-1	SR 79 FROM N ENVIRONMENTAL ROAD TO STROCKLAND ROAD	CONST.COMPLETE		09/16/2011 A		0	1	0213-ADD LANES & RECONSTRUCT	WASHINGTON	WILLIAM BARBER	0	Y
220773-7	SR 79 FROM CR 279 PATE POND RD TO N OF CYPRESS CREEK BR	ROW ACQUISITION BEG.				0	1	0213-ADD LANES & RECONSTRUCT	WASHINGTON	WILLIAM BARBER	0	Y
222477-1	SR 8 (I-10) FROM SR 291 DAVIS HIGHWAY TO SR 10A (US 90) SCENIC	ROW ACQUISITION BEG.	08/28/2013	05/28/2017		-111	1	0213-ADD LANES & RECONSTRUCT	ESCAMBIA	WILLIAM BARBER	0	N

Float greater than or equal to 0   
 Float less than 0 and greater than or equal to -20   
 Float less than -20

Page 1 2 3 4 (Showing items 1 to 10 of 38) Show per page 10 25 50 From 1 To 38 [Export Results](#)

The user can set this profile as default profile by clicking on the **Set as Default** hyperlink.

**Note:** For more information on the Dashboard, please read the Dashboard Help Document.