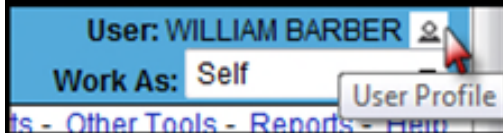# User Profile – Search Profile Management

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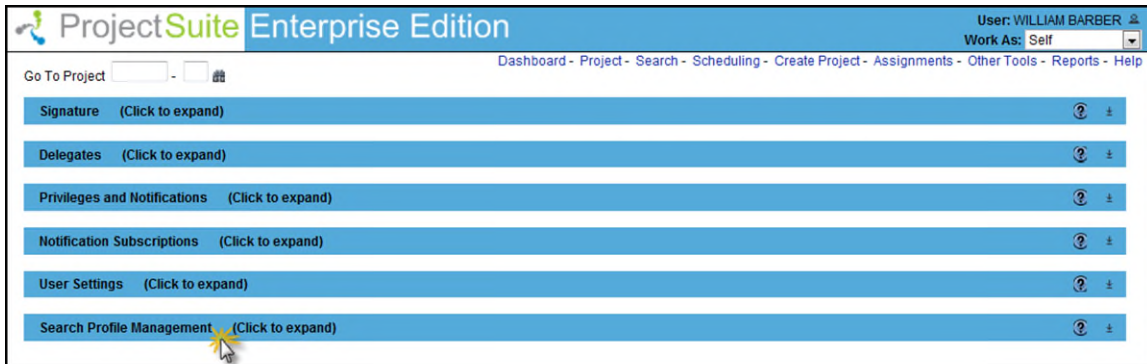
3. Click on the **Create Profile** hyperlink.

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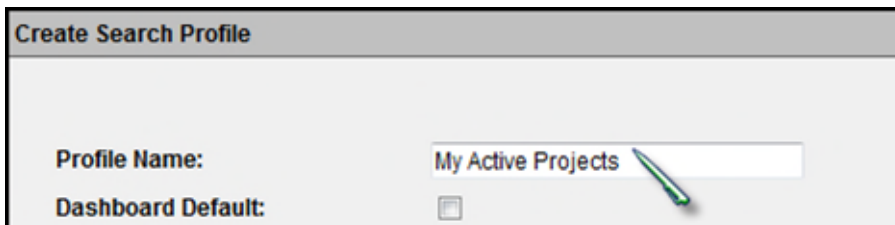
5. Also part of the Create Search Profile window, are many values that can be populated to narrow your Project Search. For more information on these values, please read the Project Search Help Document. Enter the selection criteria and click on the **Search** button. To clear the Search criteria, click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

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.

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

4. 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.

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.

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

3. Select Edit to set a new Dashboard Default or change the Profile Name.
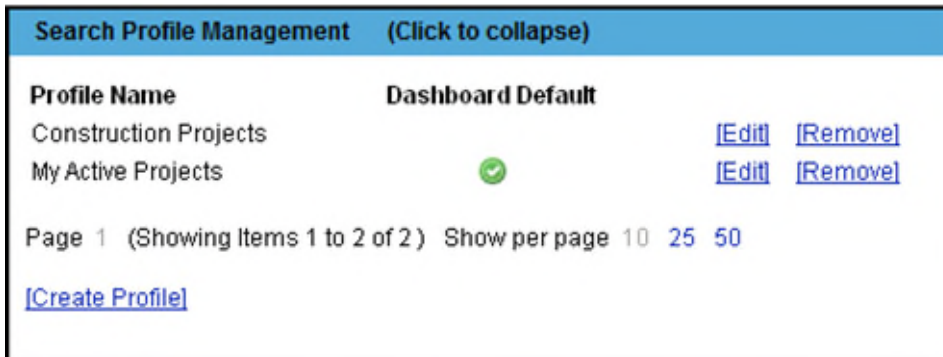
4. Make changes and select the Save button.

5. There can be only one Dashboard Default at a time.
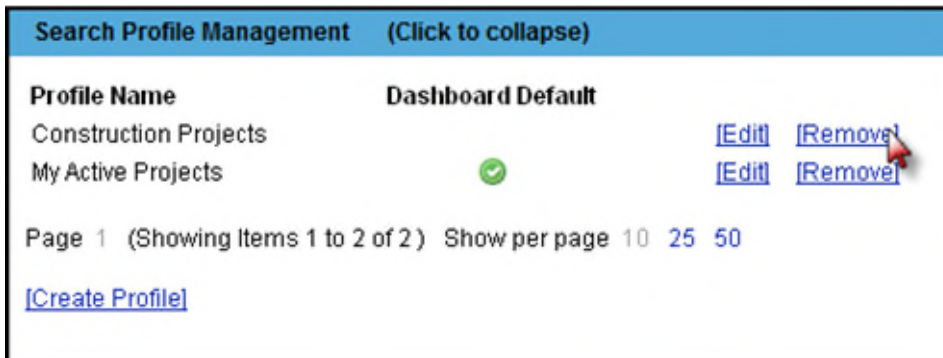
6. If a named Profile is no longer needed, select the Remove hyperlink.
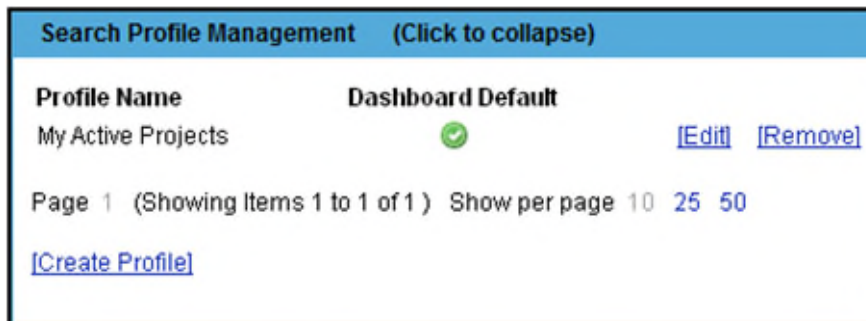
7. Click OK to confirm removal.
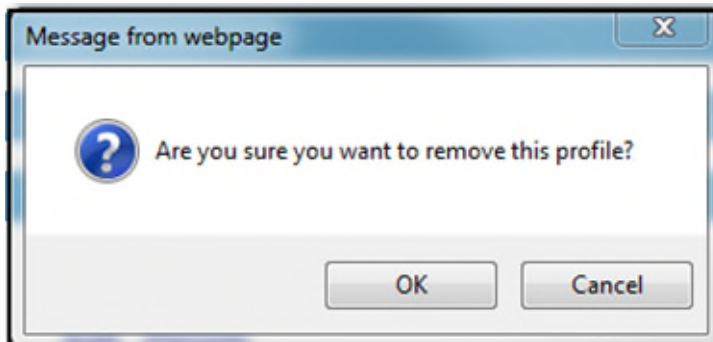
8. The Profile is removed.

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.

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.

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

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.