

## ProjectSuite Enterprise Edition (PSEE)

### Search Profile & Dashboard Management

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## 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.



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## Common Searches

- “This fiscal year lettings”.
  - When saved this saved search will be different on June 30<sup>th</sup> and July 1<sup>st</sup>. 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.

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## Open User Profile

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

User: Erica Hewett 

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## Create a Profile

- Click create profile

Search Profile Management (Click to collapse)

| Profile Name          | Dashboard Default                   |                      |                        |
|-----------------------|-------------------------------------|----------------------|------------------------|
| 46030                 | <input checked="" type="checkbox"/> | <a href="#">Edit</a> | <a href="#">Remove</a> |
| ALL CC current FY     |                                     | <a href="#">Edit</a> | <a href="#">Remove</a> |
| Current FY Letting    |                                     | <a href="#">Edit</a> | <a href="#">Remove</a> |
| D3 Next FY            |                                     | <a href="#">Edit</a> | <a href="#">Remove</a> |
| D5 Current FY letting |                                     | <a href="#">Edit</a> | <a href="#">Remove</a> |
| Jess Glenn            |                                     | <a href="#">Edit</a> | <a href="#">Remove</a> |
| LAP Projects          |                                     | <a href="#">Edit</a> | <a href="#">Remove</a> |
| Next FY Lettings      |                                     | <a href="#">Edit</a> | <a href="#">Remove</a> |
| Pam Miner projects    |                                     | <a href="#">Edit</a> | <a href="#">Remove</a> |
| all districts         |                                     | <a href="#">Edit</a> | <a href="#">Remove</a> |

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[Create Profile](#)

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## 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.*

Create Search Profile

Profile Name:

Dashboard Default: ☐

Project:

Active Status:

New Segment Group:

Transportation System:

Project With No FIDE ID: ☐

Project With FIDE ID: ☐

Without Profile: ☐

WSP Project Manager (Primary Backup):

WSP Project Manager:

Description: New Seg. Comments:

Contract Number:

Local Agency:

Fund Code:

Phase Grouping:

Fiscal Year:

Contract Lines:

Work Mile:

Location:

County:

Highway ID:

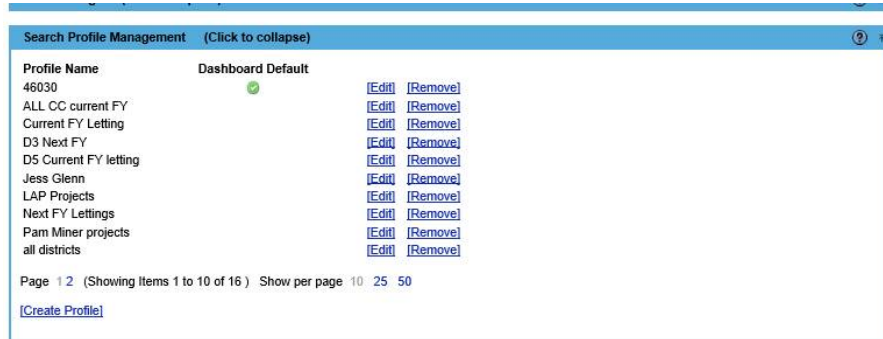
Bridge ID:

Save Cancel

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## 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



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## My Dashboard

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

| Project | Local Name                               | Status     | Letting   | Construction Start | Schedule Completion | Cost | Contract Cost | Work Item                        | County   | ESCROW         | Open | Close |
|---------|------------------------------------------|------------|-----------|--------------------|---------------------|------|---------------|----------------------------------|----------|----------------|------|-------|
| 1       | 27390-2 SR 302 PLATONSON BLVD FROM S.    | BIDS RECD. | 6/15/2022 |                    |                     | 2    | 1             | WID RESURFACING                  | BAV      | Ray Hodge      | 0    | N     |
| 2       | 27390-2 SR 164 SR 164 OVER BAYVIEW TR.   | CONTRACT   | 6/15/2022 |                    |                     | 2    | 1             | WID BRIDGE - PAINTING            | ESCAMBA  | THOMAS SANNA   | 0    | N     |
| 3       | 22440-3 SR 300 US 310 FROM NORTH OF      | AWARDED    | 5/20/2022 |                    |                     | 2    | 1             | WID LANDSCAPING                  | WAKULLA  | Pamela Mene    | 0    | N     |
| 4       | 22440-3 DISTRICT 3 SCHOOL ZONE IMPLEM.   | UNDER CON. | 1/30/2022 |                    |                     | 2    | 1             | WID SAFETY PROJECT               | DISTRICT | Eric Velez     | 0    | N     |
| 5       | 22440-3 SR 610 OVER CROCKETT CREEK       | UNDER CON. | 1/14/2021 |                    |                     | 2    | 1             | WID BRIDGE - PAINTING            | CALHOUN  | Michael Foster | 0    | N     |
| 6       | 40210-2 SR 610 OVER SPRINGFIELD          | CONTRACT   | 6/15/2022 |                    |                     | 2    | 1             | WID BRIDGE - PAINTING            | WAKULLA  | Jeffrey Hoke   | 0    | N     |
| 7       | 41800-4 SR 370 GOLF COAST PARKWAY PROJ.  | BIDS RECD. | 6/15/2022 |                    |                     | 2    | 1             | WID NEW ROAD CONSTRUCTION        | BAV      | Dean Michael   | 0    | N     |
| 8       | 41800-2 SR 18 US 90 DOCK CROCKETT REV.   | AWARDED    | 5/20/2022 |                    |                     | 2    | 1             | WID BRIDGE REPAIR/REHABILITATION | LEON     | Anthony Hoke   | 0    | N     |
| 9       | 41800-2 SR 18 US 90 FROM AIRPORT RD.     | AWARDED    | 4/15/2022 |                    |                     | 2    | 1             | WID LANDSCAPING                  | OKALOSA  | Pamela Mene    | 0    | N     |
| 10      | 41800-2 SR 38 US 90 BROOKS BRIDGE N.     | AWARDED    | 5/20/2022 |                    |                     | 2    | 1             | WID BRIDGE REPLACEMENT           | OKALOSA  | Eric Velez     | 0    | N     |
| 11      | 41800-2 SR 383 CANYON CIRCLE FROM CR.    | BIDS RECD. | 6/15/2022 |                    |                     | 2    | 1             | WID ADD LANES & RECONSTRUCT      | LEON     | Clay Hunter    | 0    | N     |
| 12      | 42100-2 SR 15 FROM BUS OVER PISA         | CONTRACT   | 6/15/2022 |                    |                     | 2    | 1             | WID BRIDGE REPAIR/REHABILITATION | OKALOSA  | Robert Thomas  | 0    | N     |
| 13      | 42100-2 SR 15 OVER JAIL/CRIMINAL JUSTICE | CONTRACT   | 6/15/2022 |                    |                     | 2    | 1             | WID BRIDGE REPAIR/REHABILITATION | OKALOSA  | Robert Thomas  | 0    | N     |
| 14      | 42100-2 SR 15 US 90 FROM SR 277 VER.     | CONTRACT   | 4/27/2022 |                    |                     | 2    | 1             | WID RESURFACING                  | WAKULLA  | Frank Jankin   | 0    | N     |
| 15      | 42100-2 SR 383 NAVY BLVD FROM BAYVIEW    | CONTRACT   | 4/27/2022 |                    |                     | 2    | 1             | WID RESURFACING                  | ESCAMBA  | Robert Hoke    | 0    | N     |
| 16      | 42100-2 SR 383 FROM SR 383 OVER SR 16    | CONTRACT   | 4/27/2022 |                    |                     | 2    | 1             | WID RESURFACING                  | OKALOSA  | Robert Hoke    | 0    | N     |
| 17      | 42100-2 SR 383 FROM SR 383 OVER SR 16    | CONTRACT   | 4/27/2022 |                    |                     | 2    | 1             | WID RESURFACING                  | OKALOSA  | Robert Hoke    | 0    | N     |
| 18      | 42100-2 SR 383 FROM SR 383 OVER SR 16    | CONTRACT   | 4/27/2022 |                    |                     | 2    | 1             | WID RESURFACING                  | OKALOSA  | Robert Hoke    | 0    | N     |
| 19      | 42100-2 SR 383 FROM SR 383 OVER SR 16    | CONTRACT   | 4/27/2022 |                    |                     | 2    | 1             | WID RESURFACING                  | OKALOSA  | Robert Hoke    | 0    | N     |
| 20      | 42100-2 SR 383 FROM SR 383 OVER SR 16    | CONTRACT   | 4/27/2022 |                    |                     | 2    | 1             | WID RESURFACING                  | OKALOSA  | Robert Hoke    | 0    | N     |

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## 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.



## 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.



[illegible]