
























# ProjectSight Icons









The following is a list of icons that are available to use throughout the settings and or records created and used in ProjectSight.

1.  (Navigation Menu) - Used to navigate to different portfolios or to projects inside a specific portfolio. Also where you go to review and edit Portfolio and Project Settings plus when accessing from inside of a Project you can navigate directly to a module.
2.  (Settings) - Used to edit Portfolio or Project specific settings.
3.  (Search) - Shows or hides the search / filter panel which allows you to search based on the selection in the By drop down lists.
4.  (Create New) - Used to create a new record or data list based on the current settings, module, or record view.
5.  (Resource Center) - Used to access the built-in resource center that contains the following.

You can also search inside of this menu by selecting the  (Knowledge Search) icon.

- a. Online Help - External link to integrated detailed ProjectSight help site
  - b. Release Notes - External Link to ProjectSight resources site
  - c. Product Ideas - External Link to ProjectSight Idea Portal site
  - d. Resources - External Links to ProjectSight resources including the ProjectSight blog page, module demo page, videos page, Trimble Learning Site and other resources
  - e. Contact Support - Detailed information on how to contact support via Live Chat, Phone and Email. A link to the current list of holidays will also open in a new tab to show when the technical support team is available throughout the year
6.  (More) - Additional options for the current view or information about the usage standards for ProjectSight. The following is available when selecting the More icon. This icon in a record is also used to expand a comment window.
    - a. Refresh
    - b. View in Excel
    - c. Collapse All
    - d. Expand All
    - e. Terms of Service
    - f. Privacy Policy
  1.  (Applications) – Available in all view at the top of the ProjectSight Window. Used to access external application including but not limited to:
    - a. Trimble Connect
    - b. Trimble Work Center
    - c. Trimble MEP solutions
    - d. Trimble ERP solutions (when integrated)
    - e. External Links set-up in the Portfolio or Project settings.

7.  (Export this Project) - Only available if the export option has been allowed in the Portfolio settings.
8.  (Print Report) - Used to view, download, and print pre-built reports, custom reports and ad-hoc reports based on the current view. Can select to print both project specific and multi-project reports.
9.  (Dashboard Widget Control) - Used to update the dashboard widgets that are displayed on the main Project view screen. This view can be set up by the user and is unique to that user.
10.  (Assignments Panel) - Used to display the Assignments Panel where assignments can be filtered by a number of options. Current active assignments for the User will appear in this panel.
11.  (Edit Project) - Used to access the Project details. The project details contain the following information tabs.
  - a. General - Project Description and Notes
  - b. Miscellaneous - Project Type, Location and Key Contacts
  - c. Details - Information for Legal Documents and Notary Public Information
  - d. Team - Contacts List (to edit this list you have to had project contacts via the User settings or as a Contact assigned to a Company in the Company settings)
12.  (View Project Team / Sharing) - Displays a list of project contacts. Used to share a record with project contacts.
13.  (Import / Export) - Used to export the settings, lists, records, view, etc. to Excel. Once updated in Excel the Import option can be selected and the information in ProjectSight will be updated based on the changes.
14.  (Information) - Shows or hides the information panel which shows the general information about the selected record. This panel will automatically display when a record is selected in a module view.
15.  (Tile View) - Used to set the view to display each record as a tile.
16.  (List View) - Used to set the view to display each record as a list.
17.  (Column Selector) - Will be visible once the view has changed to the List View. Used to select the columns that display in the overall list view.
18.  (Expand) - Used to expand a panel or window to a full-size view.
19.  (Save) - Used to save the changes in a record.
20.  (Copy) - Used to copy the information in a record and create a new record for editing based off that information.
21.  (Save and Reload) - Used to save changes in a record and reflect the changes in the current view.

22.  (Links) - Used to access the Links panel. In this panel you can add new links to the record and see previously linked information attached to the record.
23.  (Close) - Close current record / window / panel
24.  (Send) - Used to send/post a comment to the records comments tab.
25.  (Send Assignment Reminder) - Used to send an email reminder about the selected records to those that have been assigned to the record.
26.  (Show drop-down) - used to select an option from a drop-down list.
27.  (Expand Window and Search) – Used to open up the search window to search for a data selection, create new data and pick a selection from a predefined distribution list.
28.  (Locked) - Project settings are locked to match Portfolio settings, or record is locked from editing.
29.  (Unlocked) - Project settings are unlocked from the Portfolio and can be changed as required, or record is unlocked for editing.