

# ProjectSight Readme

Updated July 2018 © Trimble ®

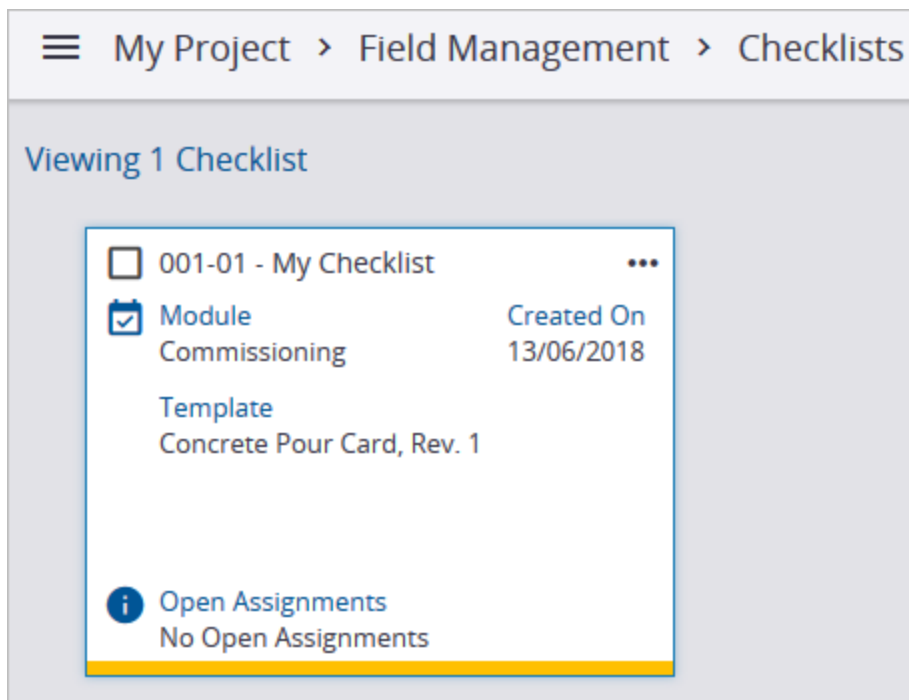
Please read this document for important information on this release.

For the latest information about ProjectSight, visit our [website](#).

## Feature enhancements

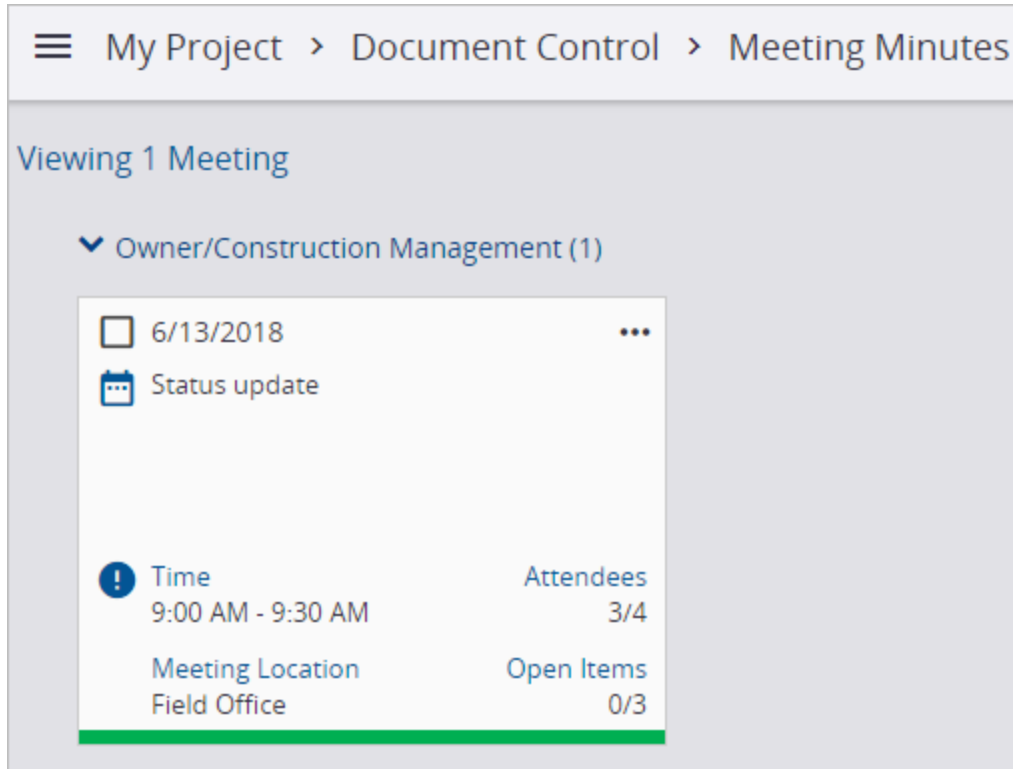
### Checklists

You can now create and edit checklists in ProjectSight for the web.



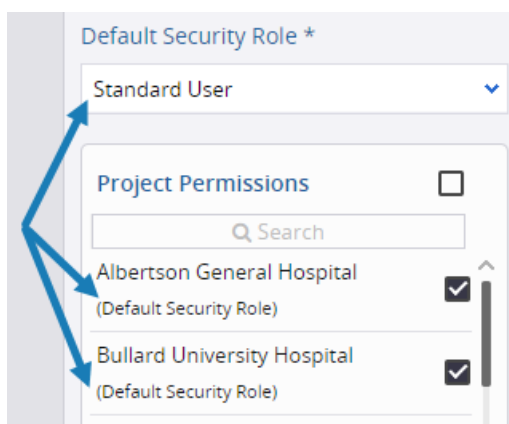
## Meeting minutes

Meeting minutes are available for the tracking of project-related meetings. You can add items to the agenda and send an invitation to the attendees.

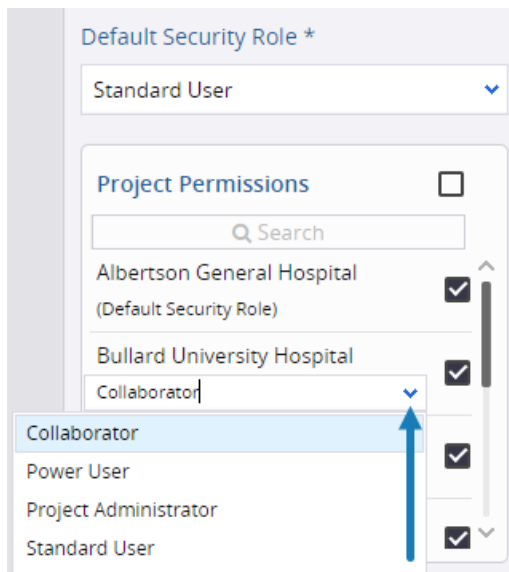


## Project security role

Administrators can now assign users a default security role for every project that they have access to. This option simplifies the process of granting users the same security role to multiple projects.

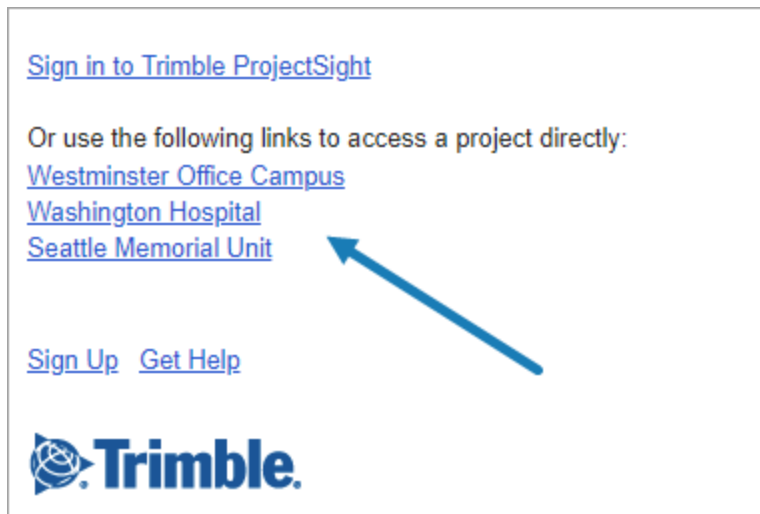


They also have the option to choose a different security role for a project. Changing the default security role will not affect this project-specific role.



### Portfolio / Project invite notification

Portfolio / Project invitations now include a list of projects that you were invited to collaborate on.



### Export / import enhancement

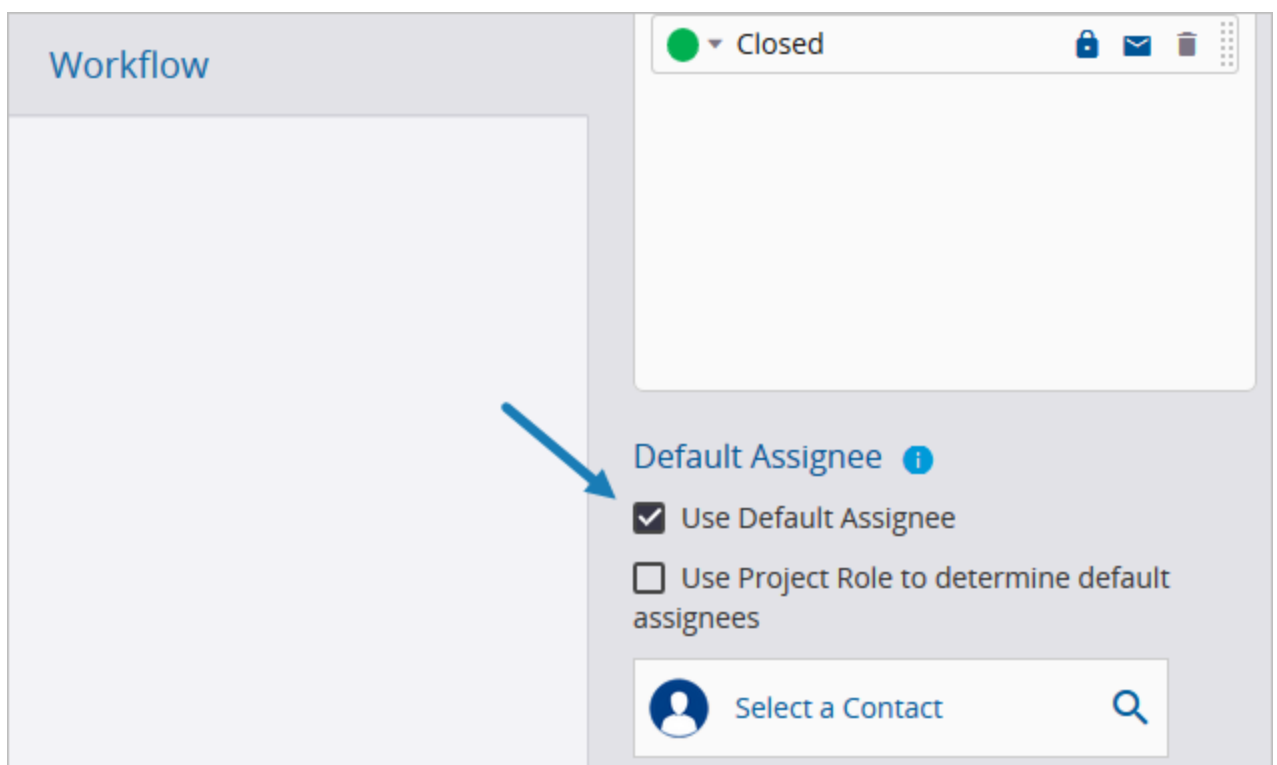
ProjectSight's Excel export / import functionality has been expanded to include other areas and features of ProjectSight:

- Users
- Lookup lists
- Action items
- Punch items
- Safety notices
- Notices to comply
- Field work directives
- RFIs
- Issues

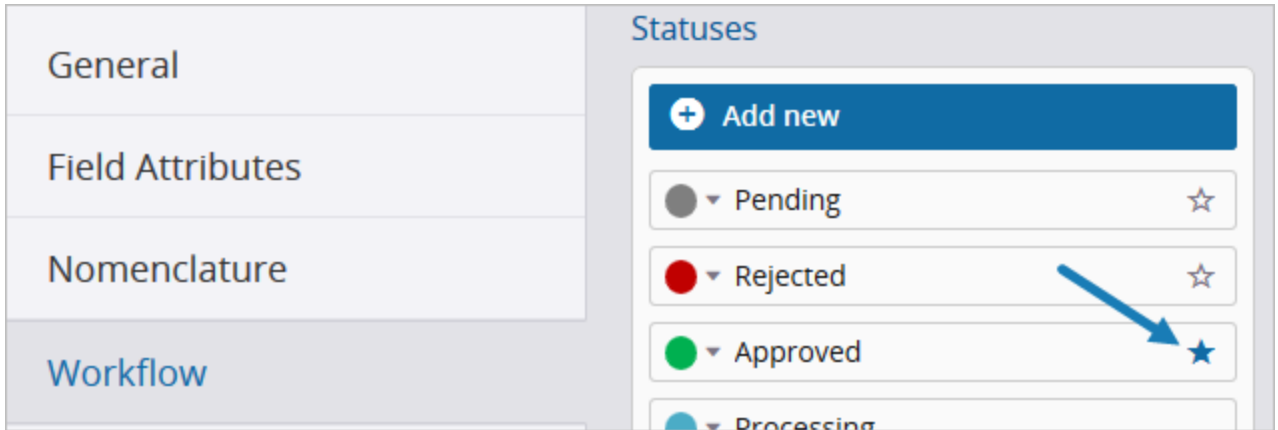
### Settings enhancements

The following enhancements have been made in the settings:

- Default assignees - You can set a contact name or project role that's assigned automatically to new drawing sets, drawings, and records.



- Default workflow status for drawings - You can set the workflow status for drawings that are uploaded in a drawing set.

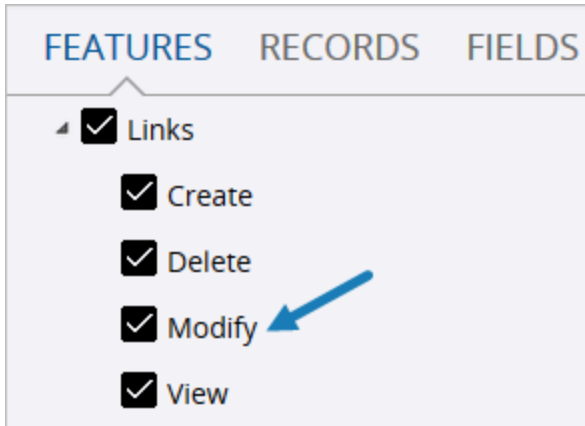


- Field attributes - In the record settings, you can customize the field attributes that are applied when new records are created.

Portfolio Settings > Action Items

Field Attributes		Field Name	Default Value	Required	Min Length / Value	Max
- Action Item						
Created On	Today	...	<input checked="" type="checkbox"/>			
Due Date	Set by Review Time		<input type="checkbox"/>			
Importance		...	<input type="checkbox"/>			
Location	Only in Project Settings		<input type="checkbox"/>			
Number	Not Applicable		<input checked="" type="checkbox"/>			0

- Modify links permission - You can allow roles to modify linked items, such as whether to include them in notifications.



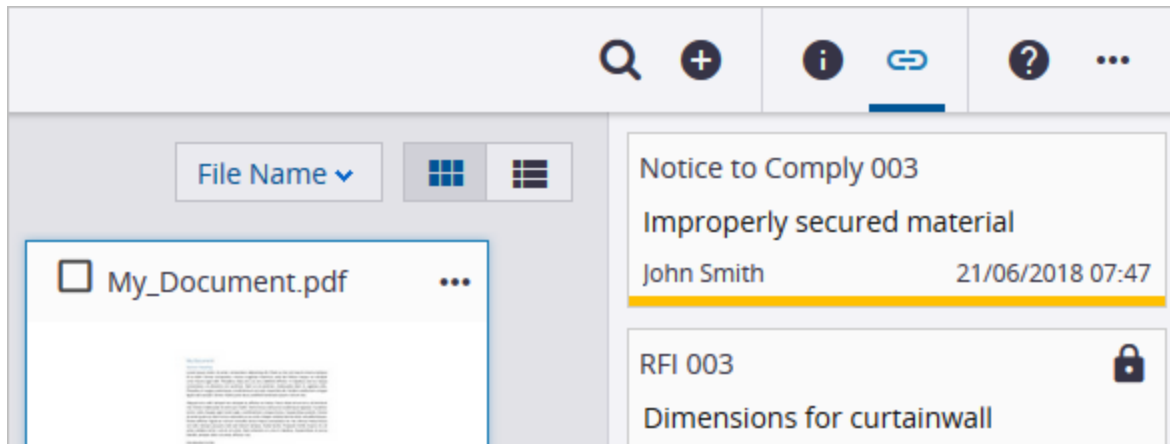
**Note:** A role is automatically granted the Modify permission for links if it has the Create permission at the time of the upgrade.

#### Miscellaneous enhancements

- Assignments for drawing sets - You can assign drawing sets to other users so they can review the drawings before publishing. (CN #1394595)
- Authors - In the Sharing panel, you can select a different author for a drawing set or record.



- Comments - When you edit a comment, you can add and remove links.
- Linked files - Files that are linked to locked records are locked automatically so they can't be modified. In the File Library, you can see which records are linked to the file and whether the linked records are locked.



**Note:** This functionality applies to new records that are locked after the upgrade.

- Submittals - You can log and track submittals related to specific packages in the Submittal Package field. If you enter a new submittal package, it's added to the lookup list settings and is available for other submittals.

## Resolved issues

In addition to several issues discovered by our internal QA department, the following issues have been resolved:

- An error no longer occurs when you add a new user with an email that matches a company contact. (CN #1423903)
- RFI numbers were corrected for specific clients. (CN #1530479 / CN# 01661134)
- Files with markups done in iOS now appear in the web application. (CN #1544078)
- Drawing annotations linked to a record are now correctly displayed as 'Public'. (CN# 01559920)
- The publishing time for a large number of drawings has been improved. (CN #1657297)
- Drawings that are linked to issues now sync properly from ProjectSight for iPad. (CN #1657300)
- Changes to linked punch items are now saved in drawings. (CN #1657392)
- The file name is used if a drawing has a different rotation than the one that was used to define the area, and no text is found in the same area of the drawing. (CN #1658029)

## Software requirements

The latest 64-bit versions of the following browsers are supported:

Client browser	Supported
Chrome	✓
Firefox	✓
Internet Explorer 10 and earlier	✗
Internet Explorer 11	✓
Microsoft Edge	✓

## Known issues

### Meeting minutes - No notifications for courtesy copy recipients

Courtesy copy recipients aren't notified when they're added to the Information panel of the main record and aren't added automatically to meeting invitations.

### Nomenclature - Nomenclature not used for most system reports

If you change the nomenclature, most system reports will still use the default system names. Only system reports for meeting minutes use the nomenclature.

### All browsers - No downloaded report

When you download a report, a pop-up may open and close without generating a report. To avoid this issue, add trimble.com to the list of allowed sites for pop-ups:

- Chrome - **[\*.]trimble.com**
- Firefox - **https://trimble.com**
- Internet Explorer 11 - **\*.trimble.com**

For Microsoft Edge, you can turn off the pop-up blocker.

### Internet Explorer 11 - Drawing viewer

If an error appears when you open or zoom in to a drawing, you can restart the browser or switch to another one such as Chrome or Firefox.



## Internet Explorer 11 - Portfolios with large amounts of data

If your portfolio contains thousands of records, an error may occur due to insufficient space.

### To increase the amount of space

1. In Internet Explorer 11, click **Tools > Internet options**.
2. On the **General** tab, click **Settings**.
3. On the **Caches and databases** tab, increase the value in the **MB** field.

## Microsoft Edge - Reports

If a report isn't downloaded in Microsoft Edge, you can change your browser settings.

### To change the settings

1. In Microsoft Edge, click **More > Settings**.
2. Click **View advanced settings**.
3. Turn off the **Ask me what to do with each download** switch.

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## Trimble GC-CEC Division, Support Services

Trimble GC-CEC Division, Support Services is committed to offering timely, thorough, and efficient resolutions for your operation issues in accordance with your Trimble Support Contract. Our technical staff is available during normal service hours of 05:00 to 17:00 PT Monday through Friday, excluding [holidays](#).

You can contact Trimble GC-CEC Division, Support Services by telephone:

- US & Canada: +1 (800) 565-9490
- International: +1 (916) 294-2100

You can also visit the [ProjectSight Support Portal](#) to start a live chat session with Support, browse the knowledge base, and view your support cases.

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