Bulk Export of Files and Data from Project

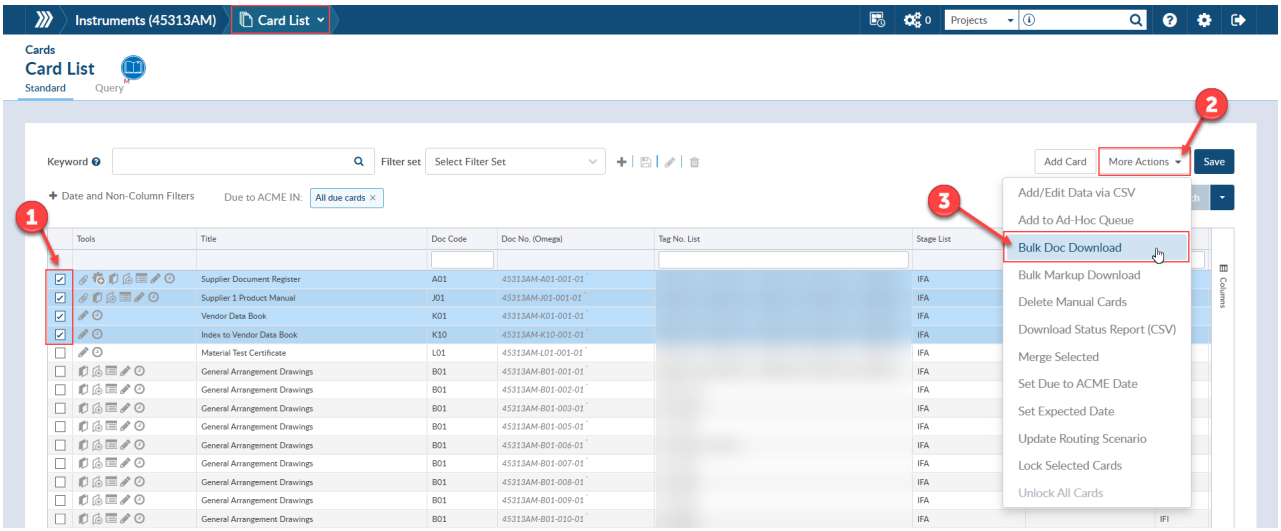
09/28/2026 9:03 am MDT

Current versions of files from a single project

Bulk download

Users can extract the most recent file from multiple cards via the**Bulk Doc Download** function on the card list.

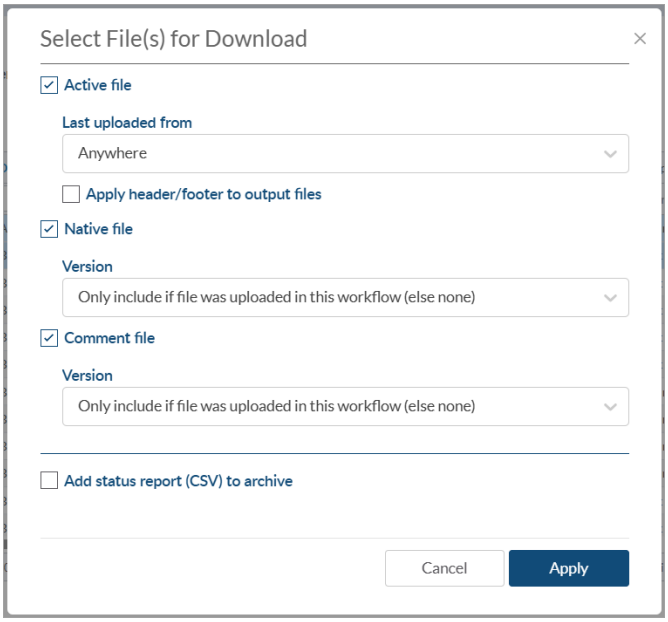
Navigate to the card list for any project, select the card(s) you want to include in the export and click "More Actions" - select the "Bulk Doc Download" option from the drop-down.



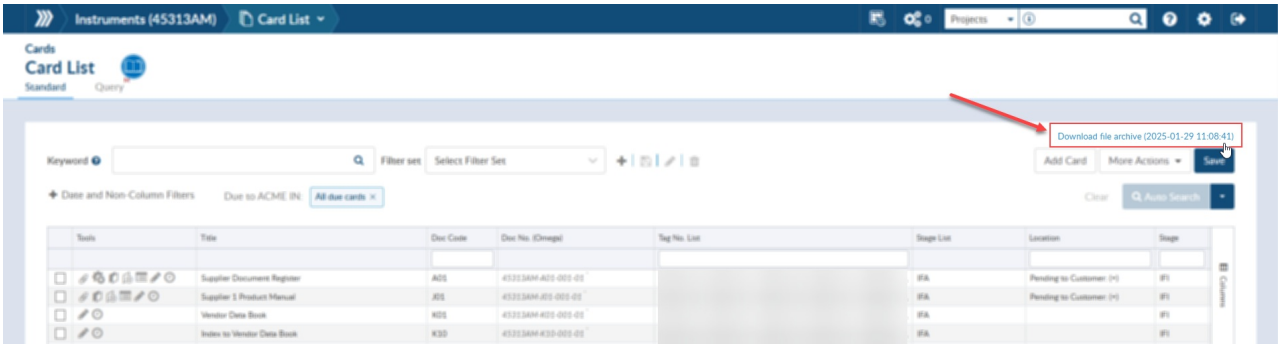
Once selected, a pop-up will appear where you can select the types of files to be downloaded.

If downloading the active file, you can choose to download the latest file from a specific source (e.g., the last return from a customer) or the most recent file (from any source). The option to apply headers/footers (as set on project main) is also available.

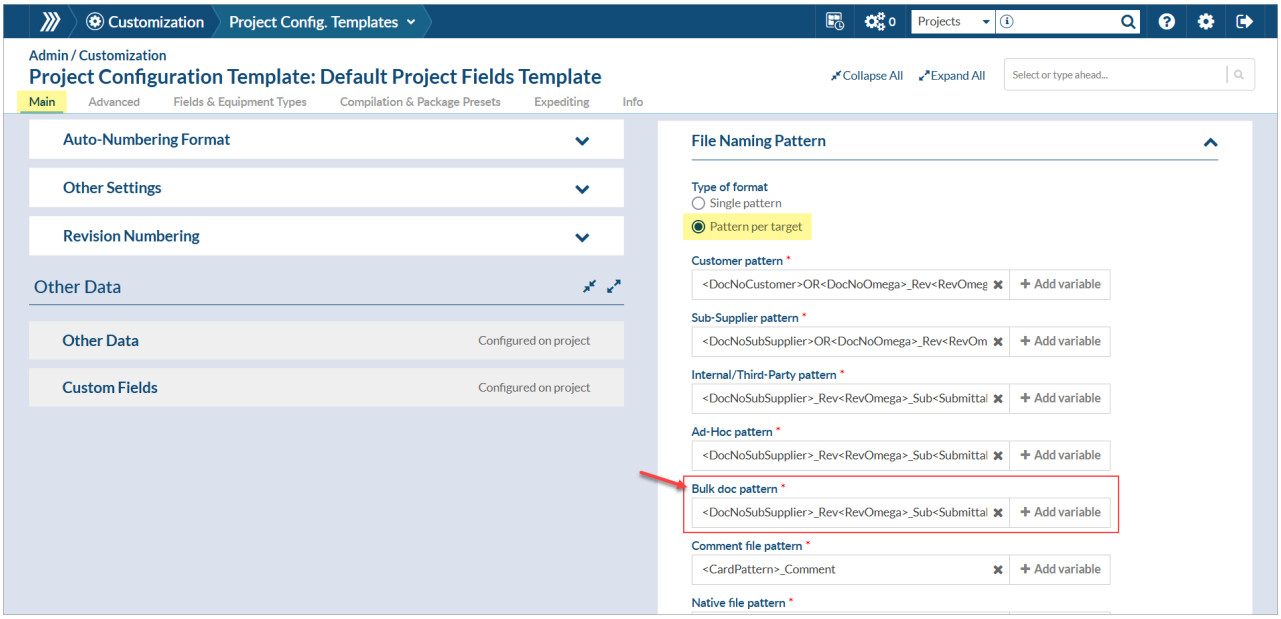
If downloading the native or comment file, you can choose which version of the file to download.



After clicking "Apply," the files from the selected card(s) will be prepared. Once completed, click the "Download file archive (YYYY-MM-DD XX:XX:XX) link to begin downloading a zip file with the card(s) you selected.



The files are named according to the Outgoing File Names pattern defined from the "Main" tab of the **Project Configuration** page.

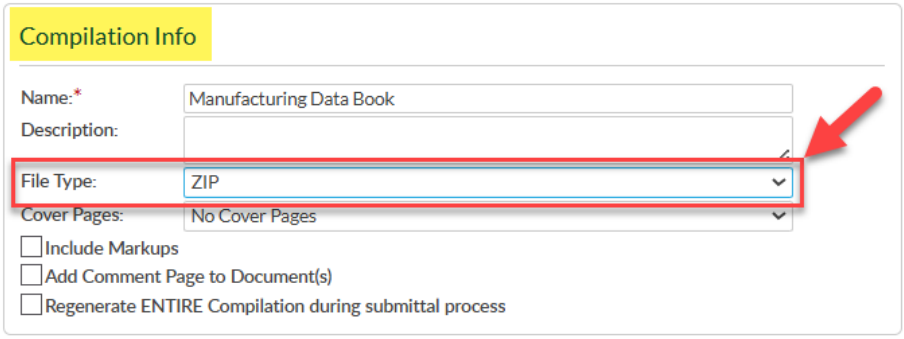


(If "single pattern" is selected, that pattern will be used instead.)

This export will provide you with the MOST RECENT VERSION of each file.

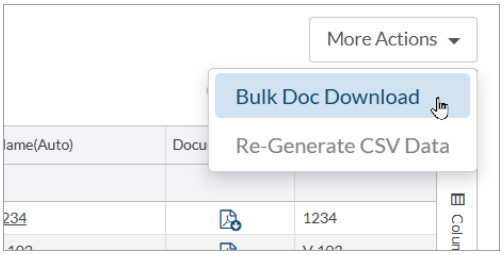
Zip compilation

If you are looking for a zip folder with substructure (i.e. per doc code) and with options to remove cover pages and make formatting/naming changes like you could with a PDF compilation, then your best option will be to create a compilation as a "ZIP" file type. See Compilation Details and Structure Options for more information.



Current versions of files from multiple projects

The **Multi-Project Card Report** allows users to download documents in bulk from multiple projects at once. This option is available on the top right of the grid. Users can download active, secondary/native, and comment files from here.



The naming convention for the bulk doc download can be modified under **Admin > General > Project Options > Bulk Doc Pattern**. (On the Multi-Project Card Report, this default overrides project settings for bulk doc pattern.)

All versions of files from multiple projects

If you wish to export every version of every file from one or more projects please send a message to our support team with the names/IDs of the projects you wish to export. This will be prepared for you and made available as a zip file. The zip will have the following folder hierarchy.

- Project
  - Doc Code
    - Card Name
      - All versions of files (using the file name convention + time/date).

> The export will include every **unique** version of the file. For example, if there are multiple lines of history with the same file version, this file will only be included in the export once.

To export card metadata and submittal history, simply create an SDI report and run it for the project(s).