

Bulk Export of Files and Data from Project

07/04/2025 3:48 pm MDT

Current 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.

The screenshot shows the 'Card List' interface for project 'Instruments (45313AM)'. A table lists documents with columns: Tools, Title, Doc Code, Doc No. (Omega), Tag No. List, and Stage List. The first four rows are selected, indicated by checkboxes in the 'Tools' column. A red circle '1' points to these checkboxes. A 'More Actions' dropdown menu is open, showing options like 'Add/Edit Data via CSV', 'Add to Ad-Hoc Queue', 'Bulk Doc Download' (highlighted with a red circle '3'), 'Bulk Markup Download', 'Delete Manual Cards', 'Download Status Report (CSV)', 'Merge Selected', 'Set Due to ACME Date', 'Set Expected Date', 'Update Routing Scenario', 'Lock Selected Cards', and 'Unlock All Cards'. A red circle '2' points to the 'More Actions' button.

Tools	Title	Doc Code	Doc No. (Omega)	Tag No. List	Stage List
<input checked="" type="checkbox"/>	Supplier Document Register	AD1	45313AM-AD1-001-01		IFA
<input checked="" type="checkbox"/>	Supplier 1 Product Manual	J01	45313AM-J01-001-01		IFA
<input checked="" type="checkbox"/>	Vendor Data Book	K01	45313AM-K01-001-01		IFA
<input checked="" type="checkbox"/>	Index to Vendor Data Book	K10	45313AM-K10-001-01		IFA
<input type="checkbox"/>	Material Test Certificate	L01	45313AM-L01-001-01		IFA
<input type="checkbox"/>	General Arrangement Drawings	B01	45313AM-B01-001-01		IFA
<input type="checkbox"/>	General Arrangement Drawings	B01	45313AM-B01-002-01		IFA
<input type="checkbox"/>	General Arrangement Drawings	B01	45313AM-B01-003-01		IFA
<input type="checkbox"/>	General Arrangement Drawings	B01	45313AM-B01-005-01		IFA
<input type="checkbox"/>	General Arrangement Drawings	B01	45313AM-B01-006-01		IFA
<input type="checkbox"/>	General Arrangement Drawings	B01	45313AM-B01-007-01		IFA
<input type="checkbox"/>	General Arrangement Drawings	B01	45313AM-B01-008-01		IFA
<input type="checkbox"/>	General Arrangement Drawings	B01	45313AM-B01-009-01		IFA
<input type="checkbox"/>	General Arrangement Drawings	B01	45313AM-B01-010-01		IFA

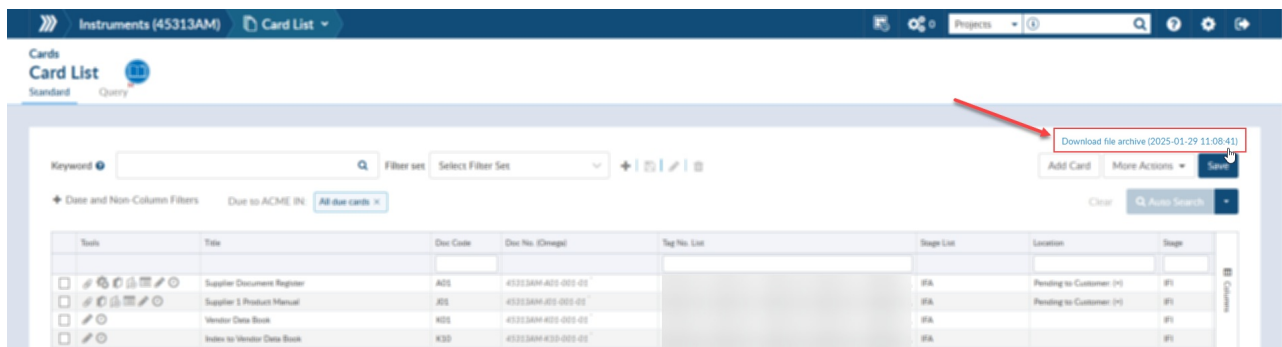
Once selected, a pop-up will appear where you can select the types of files to be downloaded. If downloading the active file, the option to apply headers/footers (as set on project main) is available.

The dialog box titled 'Select file(s) for download' contains the following options:

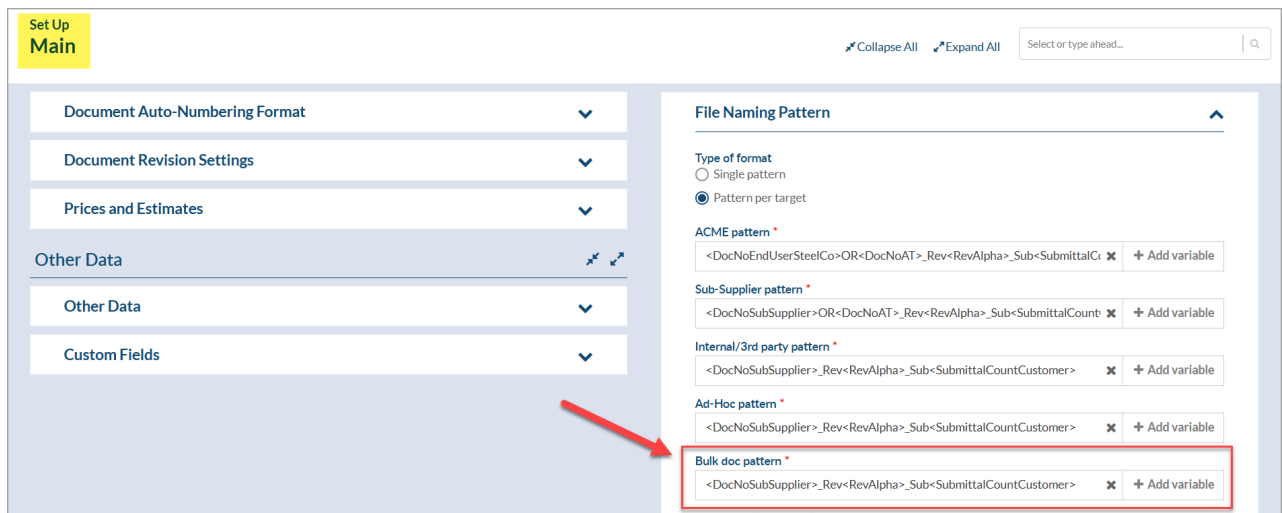
- ☒ Active file
 - ☐ Apply header/footer to output files
- ☐ Native file
- ☐ Comment file
- ☐ Add Status Report (CSV) to archive

Buttons: Cancel, Apply

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 on the main settings page of the project.



(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.

Compilation Info

Name:^{*}

Manufacturing Data Book

Description:

File Type:

ZIP

Cover Pages:

No Cover Pages

☐ Include Markups

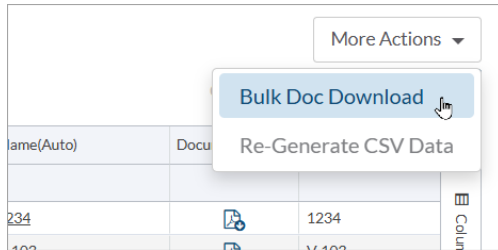
☐ Add Comment Page to Document(s)

☐ Regenerate ENTIRE Compilation during submittal process

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).

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