

Bulk Export of Files and Data from Project

04/09/2025 7:41 am 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)'. The table lists documents with columns: Tools, Title, Doc Code, Doc No. (Omega), Tag No. List, and Stage List. The first four rows are selected. The 'More Actions' dropdown menu is open, showing options like 'Add Card', 'Add/Edit Data via CSV', 'Add to Ad-Hoc Queue', 'Bulk Doc Download', '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'.

Tools	Title	Doc Code	Doc No. (Omega)	Tag No. List	Stage List
<input checked="" type="checkbox"/>	Supplier Document Register	A01	45313AM-A01-001-01		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, the card(s) you selected 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 screenshot shows the 'Card List' interface after the 'Bulk Doc Download' action. The table now includes a 'Location' column. The 'Download file archive (2025-01-29 11:08:41)' link is highlighted with a red arrow.

Tools	Title	Doc Code	Doc No. (Omega)	Tag No. List	Stage List	Location	Stage
<input type="checkbox"/>	Supplier Document Register	A01	45313AM-A01-001-01		IFA	Pending to Customer (1)	IF1
<input type="checkbox"/>	Supplier 1 Product Manual	J01	45313AM-J01-001-01		IFA	Pending to Customer (1)	IF1
<input type="checkbox"/>	Vendor Data Book	K01	45313AM-K01-001-01		IFA	Pending to Customer (1)	IF1
<input type="checkbox"/>	Index to Vendor Data Book	K10	45313AM-K10-001-01		IFA	Pending to Customer (1)	IF1

The files are named according to the Outgoing File Names pattern defined on the main settings page of the project.

Set Up

Main

Collapse All

Expand All

Select or type ahead...

Document Auto-Numbering Format

Document Revision Settings

Prices and Estimates

Other Data

Other Data

Custom Fields

File Naming Pattern

Type of format

Single pattern

Pattern per target

ACME pattern *

<DocNoEndUserSteelCo>OR<DocNoAT>_Rev<RevAlpha>_Sub<SubmittalCr> ✕ + Add variable

Sub-Supplier pattern *

<DocNoSubSupplier>OR<DocNoAT>_Rev<RevAlpha>_Sub<SubmittalCount> ✕ + Add variable

Internal/3rd party pattern *

<DocNoSubSupplier>_Rev<RevAlpha>_Sub<SubmittalCountCustomer> ✕ + Add variable

Ad-Hoc pattern *

<DocNoSubSupplier>_Rev<RevAlpha>_Sub<SubmittalCountCustomer> ✕ + Add variable

Bulk doc pattern *

<DocNoSubSupplier>_Rev<RevAlpha>_Sub<SubmittalCountCustomer> ✕ + Add variable

(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.

Set Expected Date

Bulk Doc Download

Level	Doc Code	Stage
Tag No. (TE)	O10 Technical Deviation Requests	IFA

Columns

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).
