

Filtering the Card List

03/31/2025 4:01 pm MDT

The walkthrough shown below uses the **Card List** to illustrate filtering options. Filtering on the **Multi-Project Card Report** screen uses the same layout.

There are different areas of the screen for different types of filters. The sections are called out below:

The screenshot shows the 'Cards Card List' interface. Numbered callouts indicate the following features:

- 1. Keyword search bar
- 2. Filter set dropdown
- 3. Date and Non-Column Filters button
- 4. Column filter dropdown (Status (Combined))
- 5. Page selection and pagination controls
- 6. Search mode toggle (Auto Search)
- 7. Column sorting controls (Doc C...)

Tools	Doc C...	Doc Code Name	Doc No. (Delta)	Due to Delta	Stage List	Status (Combined)	Status (Delta)	Routing	Location	Tag No. List
<input type="checkbox"/>		A01 Seller Document Register (SDR)	646917-PO-0295-A01-0001	2021-09-10	IFI	NULL	NULL			1400-161-M-298
<input type="checkbox"/>		A02 Fabrication/Production Schedule	646917-PO-0295-A02-0001	2021-09-10	IFI	NULL	NULL			1400-161-PK-29
<input type="checkbox"/>		A04 Brought Out Items List/Sub Order Copies	646917-PO-0295-A04-0001	2021-09-10	IFI	NULL	NULL			1400-161-M-298
<input type="checkbox"/>		A05 Sub Order Status Report	646917-PO-0295-A05-0001		IFI	X+	X		At Customer: +	1400-161-M-298
<input type="checkbox"/>		A09 UNPRICED PO'S FOR MAJOR ENGINEERING SUBCONTRACTORS	646917-PO-0295-A09-0001	2021-09-10	IFI	NULL	NULL			1400-161-M-298
<input type="checkbox"/>		A10 SUB-ORDER STATUS REPORT	646917-PO-0295-A10-0001	2021-09-10	IFI	NULL	NULL			1400-161-M-298
<input type="checkbox"/>		B01 General Arrangement Drawings	646917-PO-0295-B01-0006	2021-09-10	IFI	NULL	NULL			1400-161-M-298
<input type="checkbox"/>		B01 General Arrangement Drawings	646917-PO-0295-B01-0007	2021-09-10	IFI	NULL	NULL			1400-161-M-298
<input type="checkbox"/>		B01 General Arrangement Drawings	646917-PO-0295-B01-0008	2021-09-10	IFI	NULL	NULL			1400-161-P-298
<input type="checkbox"/>		B01 General Arrangement Drawings	646917-PO-0295-B01-0009	2021-09-10	IFI	NULL	NULL			1400-161-M-298

1. **Keyword search:** a quick text search option
2. **Filter sets:** save your filters as presets for later use (including on other projects/by other users)
3. **Date and non-column filters:** any filter options located outside of the grid
4. **Column filters:** filter by specific columns where they appear in the grid
5. **Page selection:** select grid page and choose how many rows to show per page
6. **Search modes:** Used to toggle between Auto and Manual search. Manual search is useful if you are working with a very large card list and notice slow loading speeds. With Auto search, each filter gets applied as soon as the user clicks anywhere else on the screen. With Manual search, the user must select the Search button to apply filters.
7. **Column sorting:** sort specific columns in ascending/descending order.

Using filters

Different types of information are filtered in different ways, described below. Once applied, filters will be visible above the grid:

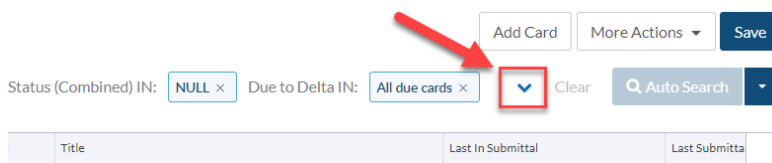
The screenshot shows the 'Cards Card List' interface with filters applied. A red box highlights the filter area above the grid, and a red arrow points to the 'Status (Combined) IN: NULL' filter.

Keyword Filter set Select Filter Set

+ Date and Non-Column Filters Doc Code IN: B04 ELECTRICAL PANEL DETAIL DRAWING × B03 MOTOR-COUPLING DETAIL DRAWING × Status (Combined) IN: NULL ×

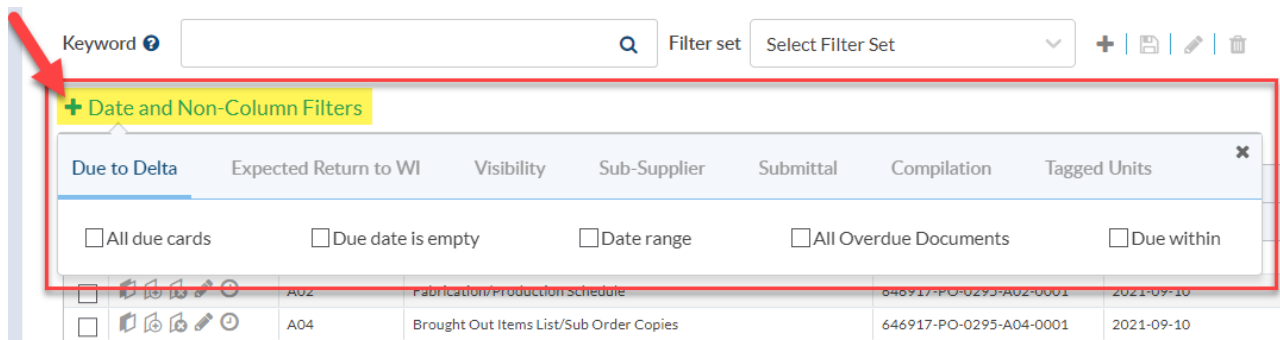
Tools	Doc C...	Doc Code Name	Doc No. (Delta)	Due to Delta	Stage List
	(2) B04 ELECT ×				
<input type="checkbox"/>	B03	MOTOR-COUPLING DETAIL DRAWING	646917-PO-0295-B03-0005	2021-09-10	IFI

If there are more active filters than can fit in a single row, an expand arrow will appear. Selecting it will display the full list of filters:



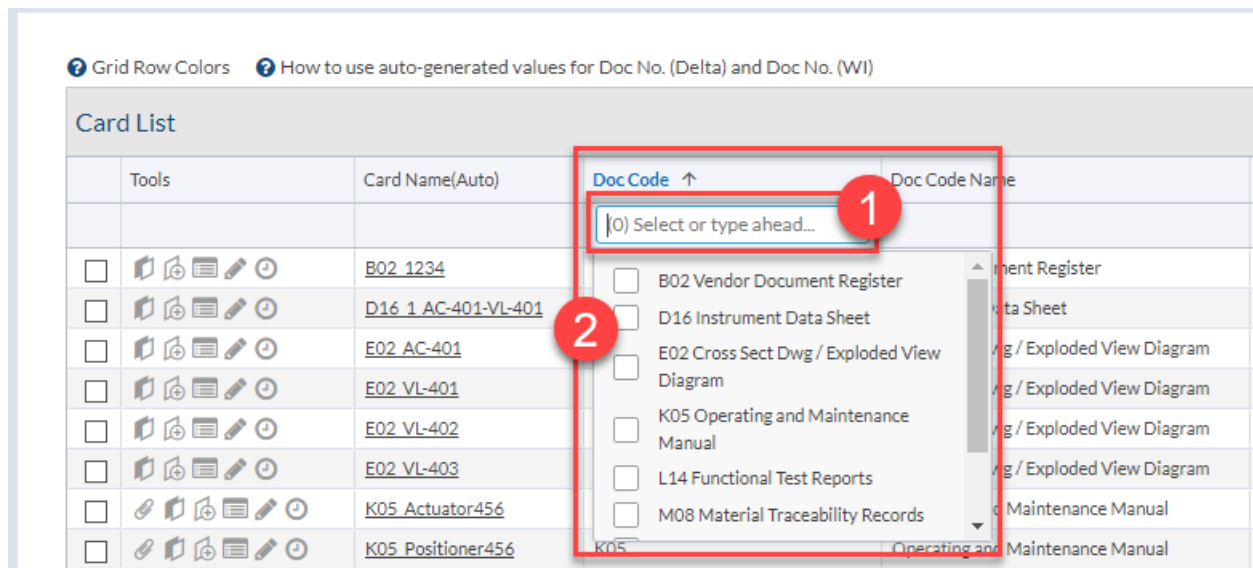
Date and non-column filters

Click on the **Date and non-column filters** option to filter by due dates, visibility, sub-supplier, submittal, compilation, or tagged units.



Column filters







Many grid columns have filtering options directly below the column header. Users can type ahead to filter (1) or select one or more options from the dropdown that appears when the box is selected (2).










Save filters (with filter sets)

Created filters can be saved for future use across other projects and for other users, or they can be saved for a specific project only.


To save the current set of filters, click on the plus icon (+) next to the **Filter** set dropdown.

Keyword   Filter set    

+ Date and Non-Column Filters Doc Code IN: Status (Combined) IN:

Tools	Doc C...	Doc Code Name	Doc No. (Delta)	Due to Delta
	(2) B04 ELECT 			
     	B03	MOTOR-COUPLING DETAIL DRAWING	646917-PO-0295-B03-0005	2021-09-10

Add a name, choose display options, and save.

Create Filter Set 

Filter Set Name *







☐ Public Filter Set

☐ Display on all Projects







To make this filter set available for other users, click to enable **Public filter set**.

To make this filter set available on all projects, click to enable **Display on all projects**.








To use a filter set, select it from the **Filter set** dropdown:

Keyword   Filter set    

+ Date and Non-Column Filters

Tools	Doc Code	Doc Code Name	Doc No. (Delta)	Due to Delta
	<input type="text"/>			
     	A01	Seller Document Register (SDR)	646917-PO-0295-A01-0001	2021-09-10

If a filter set is selected, the icons next to it can be used to save as new, save (update existing), edit name and view options, or delete:

Keyword   Filter set     

+ Date and Non-Column Filters Doc Code IN: Status (Combined) IN:





























Column sorting

Text and number columns can be sorted in ascending/descending order.

To sort in **ascending** order (A, B, C / 1, 2, 3), click on the column header once. An upward facing arrow will appear to indicate that the column has been sorted in ascending order.

To sort in **descending** order (C, B, A / 3, 2, 1), click on the column header a second time. A downward facing arrow

will appear to indicate that the column has been sorted in descending order.

Tools		Required	Doc Code	Doc Code Name	Status (Combined)	Doc No. (Omega)	Tag No. List
 	<input type="checkbox"/>	<input checked="" type="checkbox"/>	DB03	Data Book Table of Contents/Index	X(+)	0005678-DB03-001-01	PT-101, PT-102, TG-101, TG-102
 	<input type="checkbox"/>	<input checked="" type="checkbox"/>	DB01	Databook	X	0005678-DB01-001-01	PT-101, PT-102, TG-101, TG-102
   	<input type="checkbox"/>	<input checked="" type="checkbox"/>	GD04	General Catalog Data	NULL	0005678-GD04-001-01	PT-101, PT-102
   	<input type="checkbox"/>	<input checked="" type="checkbox"/>	GD04	General Catalog Data	NULL	0005678-GD04-002-01	TG-101, TG-102
   	<input type="checkbox"/>	<input checked="" type="checkbox"/>	GD10	Instrument Data Sheets	NULL	0005678-GD10-001-01	PT-101
   	<input type="checkbox"/>	<input checked="" type="checkbox"/>	GD10	Instrument Data Sheets	NULL	0005678-GD10-002-01	PT-102
   	<input type="checkbox"/>	<input checked="" type="checkbox"/>	RI16	Material Test Reports (MTR's)	NULL	0005678-RI16-003-01	TG-101
   	<input type="checkbox"/>	<input checked="" type="checkbox"/>	RI16	Material Test Reports (MTR's)	NULL	0005678-RI16-004-01	TG-102