

Filtering the Card List

09/18/2024 9:10 am 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. It includes a search bar (1), a filter set dropdown (2), a 'Date and Non-Column Filters' section (3), a table with a 'Status (Combined)' column filter (4), a 'Select Page' dropdown (5), and an 'Auto Search' button (6).

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

Using filters

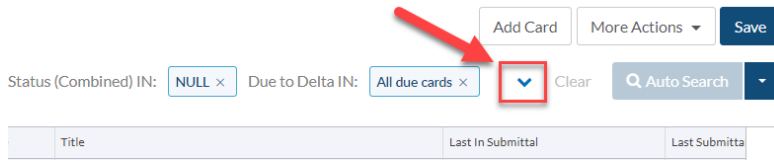
Different types of information are filtered in different ways, described below. Once applied, filters will be visible above the grid:

The screenshot shows the 'Cards Card List' interface with three active filters: 'Doc Code IN: B04 ELECTRICAL PANEL DETAIL DRAWING', 'B03 MOTOR-COUPLING DETAIL DRAWING', and 'Status (Combined) IN: NULL'. A red arrow points to the filter bar.

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

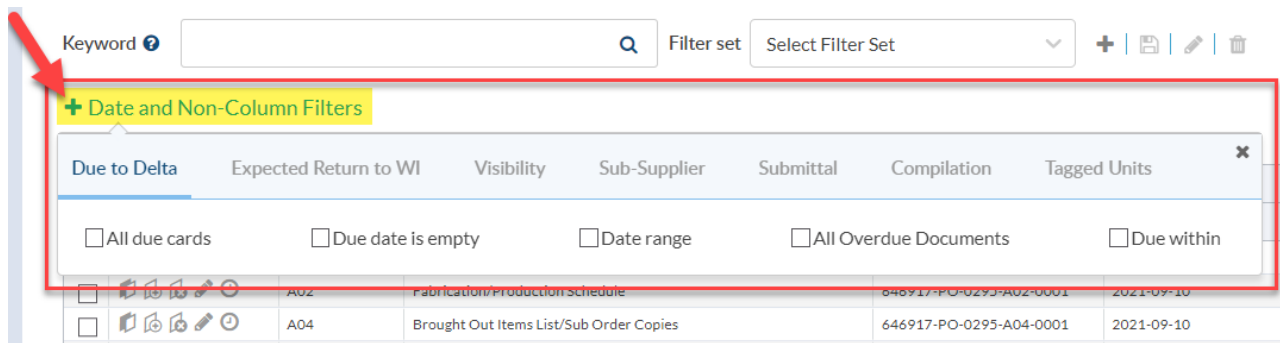
If there are more active filters than can fit in a single row, an expand arrow will appear. Selecting it will display the

full list of filters:



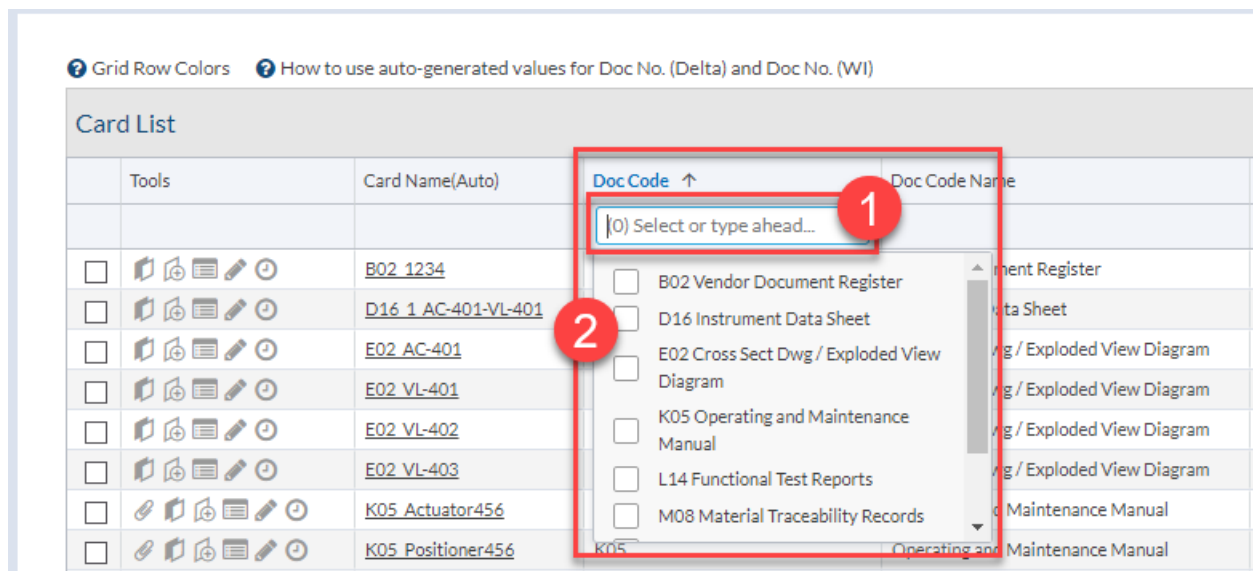
Date and non-column filters

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 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
	(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 Select Filter Set 





+ Date and Non-Column Filters

Filter set Select Filter Set 

- All Overdue
- Pending B03/B04

Tools	Doc Code	Doc Code Name	Doc No. (Delta)	Due to Delta
	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 Pending B03/B04    

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