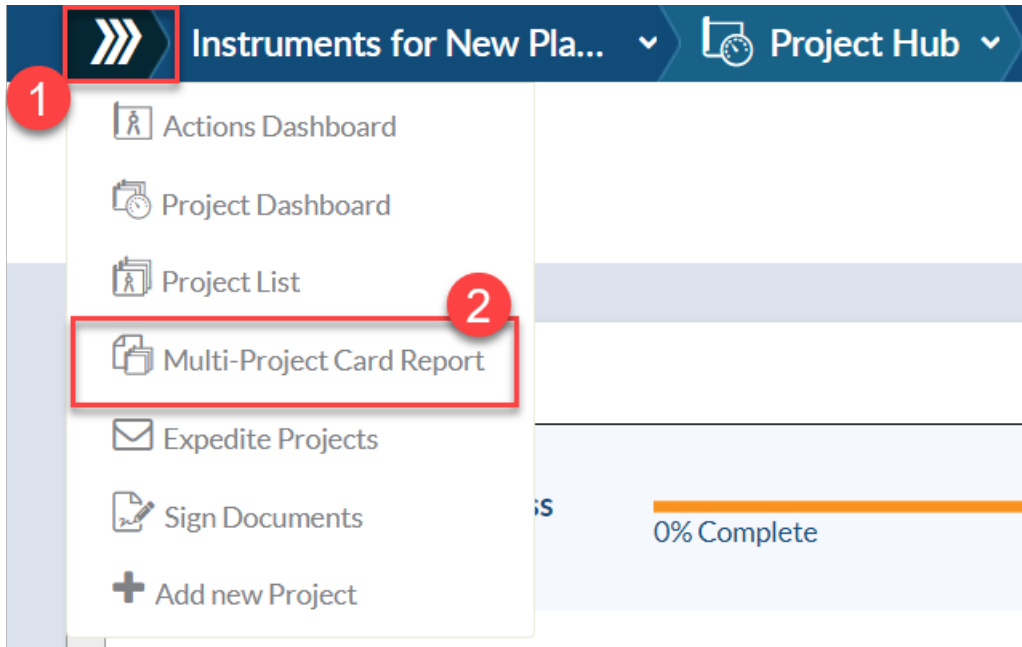


Multi-Project Card Report

09/18/2024 9:04 am MDT

To query card data across multiple projects, access the multi-project card report. It is always available by clicking the logo menu in the top right.



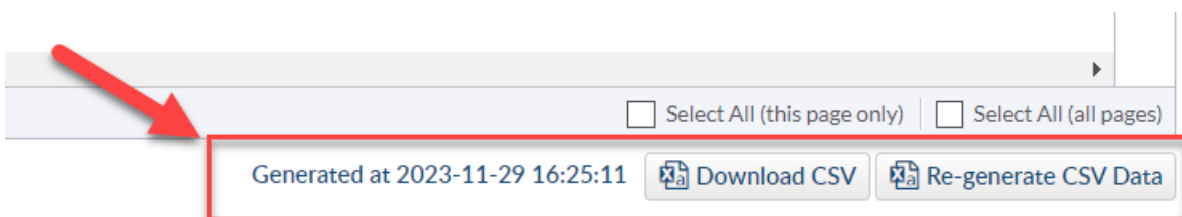
Export

Export list of cards

Users can export a list of card data from the **Multi-Project Card Report** which can be used to generate reports externally in the software of their choice (for example, creating a Pivot Table in Excel).

To get this data,

1. Filter the grid as required
2. Select all cards to be included in the report
3. On the bottom right of the grid, select **Re-generate CSV data**.
4. Once the report is regenerated (the timestamp will be updated), select **Download CSV**.



Bulk doc download

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.



Level	Doc Code	Stage	Columns
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Tag No. (TE)	O10 Technical Deviation Requests	IFA	

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.)

Filtering



Unlike the **Card List**, the **Multi-Project Card Report** displays a blank grid when opened (unless a filter set has been pre-selected). To view cards, select the desired filter(s) and click **Search**.

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

Overview

Filtering options are not limited to one section of the grid, but rather are integrated into it.

Cards
Card List
Standard Query

1. Keyword search field
2. Filter set dropdown menu
3. Date and Non-Column Filters button
4. Status (Combined) column header
6. Auto Search button
5. Page navigation and search results summary area

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-294
<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-2981
<input type="checkbox"/>		B01 General Arrangement Drawings	646917-PO-0295-B01-0009	2021-09-10	IFI	NULL	NULL			1400-161-M-298

Select Page: A01 - B01 | Show on Page: 10 | Items on page: 10 | Total Found: 51
 Set Required (this page only) Set Required (all filtered rows) Select All (this page only) Select All (all pages)

Grid Row Colors | How to use auto-generated values for Doc No. (W) and Doc No. (W)

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

- Page selection:** select grid page and choose how many rows to show per page
- 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:

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:

Add Card More Actions Save

Status (Combined) IN: NULL × Due to Delta IN: All due cards × Clear Auto Search

Title	Last In Submittal	Last Submitta

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.

Keyword Filter set Select Filter Set

+ Date and Non-Column Filters

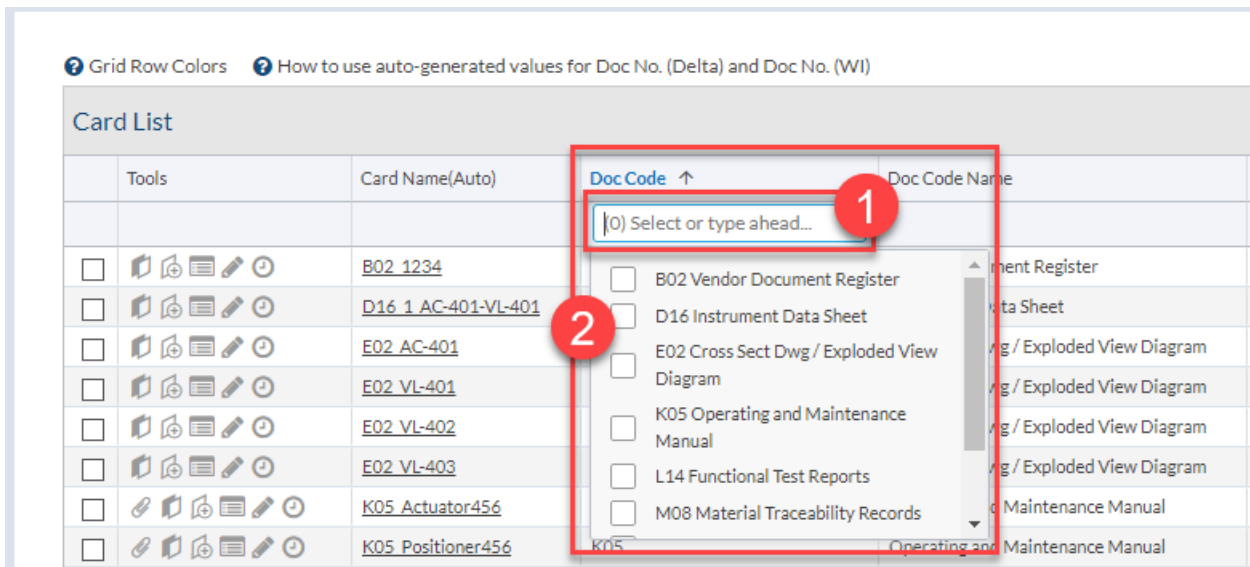
Due to Delta Expected Return to WI Visibility Sub-Supplier Submittal Compilation Tagged Units ×

All due cards Due date is empty Date range All Overdue Documents Due within

<input type="checkbox"/>	A02	Fabrication/Production Schedule	646917-PO-0295-A02-0001	2021-09-10
<input type="checkbox"/>	A04	Brought Out Items List/Sub Order Copies	646917-PO-0295-A04-0001	2021-09-10

Column filters

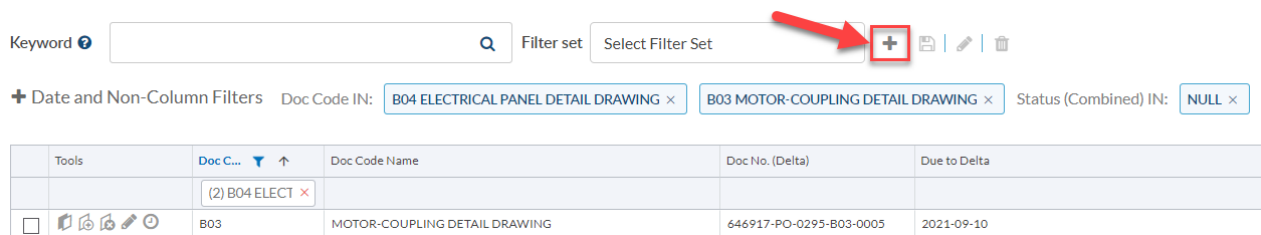
Many grid columns have filtering options directly below the column header. Users can type ahead to filter (1) or select one or more options from the dropdown that appears when the box is selected (2).



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.



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

+ 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
<input type="checkbox"/> <input type="button" value="Refresh"/> <input type="button" value="Reset"/> <input type="button" value="Filter"/> <input type="button" value="Help"/>	<input type="text" value="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: Status (Combined) IN: