PM4 + Partners
Knowledge Articles

Sorting, filtering and exporting lists
for Subcontractors, Consultants and
the Design Team

# Contents

# Sorting, Filtering and Exporting Lists

Large lists are made easier to work with when you use the sorting/filtering functionality built into PM4+ to personalize your view and quickly access relevant data. This topic shows you how to sort and filter the records in any list you can access in the PM4+ Partner Portal.

You learn how to:

- Sort a field so it displays in numerical or alphabetical order

- Filter a list on a column header, even if the list is already filtered

- Reset or clear a filter

- Export records to an Excel workbook

# Sort records by a list's column

You can only sort one column in a list. Inter-sorting of records is not available. For example, you cannot filter or sort by contractor name and then by submittal name.

1.  Choose a list to sort.

    For example, pick one of the tabbed lists available in your workspace or choose the full list from the navigation pane.

2.  Find the column you want to sort.

3.  The columns available for sorting or filtering display a drop-down arrow on the right when you hover over the column name with your mouse pointer.

4.  Click the **drop-down arrow** to display the sort/filter dialog.



| Sort selection | Sorted records |
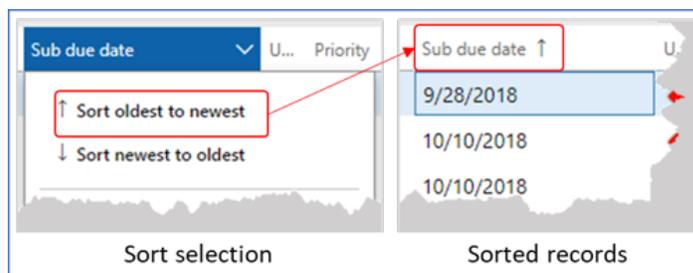
5.  Select the desired sort value.

6.  Depending on the type of information in the column (alphanumeric, numeric), the system displays a different sort selection.

    The records are sorted and an arrow beside the column label indicate the direction in which the records are sorted.

7.  To un-sort records, choose the **ID** type column and sort (A to Z) as these columns are sorted in ascending order by default. Alternatively, you can exit the screen.

# Filtering records

You can filter a list of records three different ways: by the column field value, by using the Filter box, or by using the filter pane. It doesn't matter which method you choose; the results are the same. The advantage of filtering at the column header is it is quick and easy to use. Using the advanced filter option can provide you with the list of predetermined values for certain fields to filter. If the list is already filtered, you can still apply additional filters to refine which records are displayed or adjust a filter already in use.

**Note:** Only one sorted column per list is allowed.

## Filtering by column field value

1.  Choose a list to filter.
    For example, pick one of the tabbed lists available in your workspace or choose the full list from the navigation pane.

2.  Find the first column to filter.

3.  The columns available for sorting or filtering display a "drop-down arrow" on the right when you hover over the column name with your mouse pointer.

4.  Click on the **drop-down arrow** to display the sort/filter dialog.

5.  Input the value you want to filter by.

6.  Click the **drop-down arrow** for the comparison operator list and choose a value.
    The values available change depending on the type of information in the field you have chosen. See the comparison operator table for values and their uses.

7.  Click **Apply**
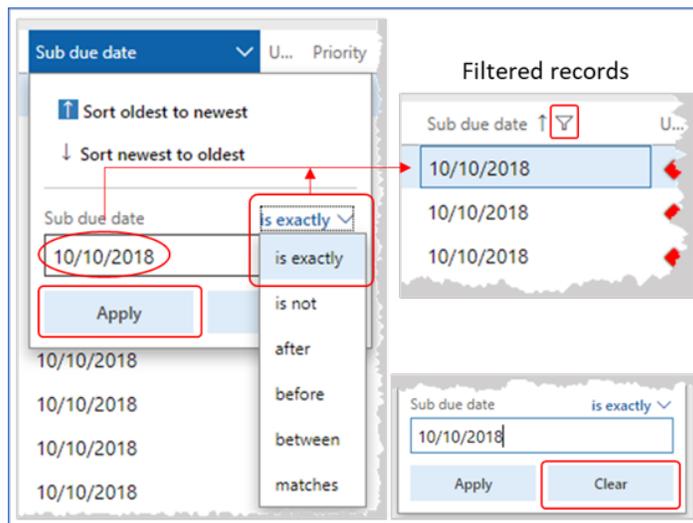


The system applies the filter and displays the filtered list.  If a sort value on the column was selected, the system retains that value as well.

8.  To clear the filter value, click the **Clear** button.
    **Note:** The list retains the sort and filter values until you clear them.


PM4+

# Filtering and searching a list using the Filter box

On the left side above each list is a search box you can use to find a specific record. You can apply the search value to most of the columns in the list, except for those columns reserved for indicators (such as, CRX, TRX, Urgency, etc.).

1.    Select a list to search by selecting a tab for a tabbed list.

2.    Click in the **Filter** box.

3.    In the Filter box, start typing the value for the search:
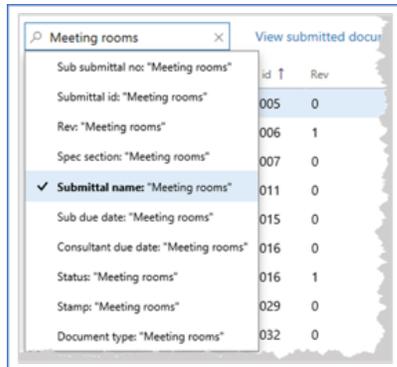


        The list of columns (fields) to search display in a drop-down list.

4.    Continue typing until there are enough characters to find your record.

5.    Click **column** name in the drop-down list.

        For example, if you want to find all the submittal records about 'Meeting rooms....', type "Meeting rooms" and choose the column "Submittal name: "Meeting rooms".

        The system shows the records that match the input characters for the chosen column.

## Comparison Operator Matrix for Filtering Records

| Value | Matched Result | Value | Matched Result | Value | Result |
|---|---|---|---|---|---|
| is exactly | Records that meet the input value exactly | begins with | The starting characters of the search field exactly match the input characters | between | Used on date fields to filter records between two dates |
| is not | Records that exclude the input value exactly | is one of | Finds one or more of the values of the input list of values to filter by | matches | Similar to the 'is exactly' operator but only used on enumerated lists (fields with predefined values) |
| contains | Records where the input value is found in the searched field | after | Only records that display after the input value in a sorted list | | |
| does not contain | Records where the input value is not found in the searched field | before | Only records that display before the input value in a sorted list | | |

# Exporting Records to Excel

Records from a log list provide partners with additional information for offline reports and/or calculations for those who do not have access to PM4+.

There are three ways to download records from a log list:

- Selecting the Open in Microsoft Office icon and Export to Excel
- Exporting all (displayed) rows
- Print grid

You can sort and filter the records prior to downloading. For more information, see: **Sorting and Filtering Lists**

## Open in Microsoft Office

This command is found on the action pane after you have opened the desired log list thru **Navigation Pane** menu. You cannot see this command if you are looking at a log list in the filtered tabbed list.

**Note**: If you do not see the menu item then you do not have access to the entire list.

1. Navigate to a log list.

2. In the action pane, (top right) select the **Open in Microsoft Office** icon.



3. Under **Export to Excel,** select the log.
   For example, if you are at the Submittal log, the menu item says **Submittal**

4. In the "Export to Excel" dialog box, select **Download.**
   Depending on your browser settings, the content may require confirmation to open, save, or cancel.

## Export all rows

The Export all rows command can be run whether you are in the log list selected from the Navigation pane or if you are viewing a list in the Tabbed lists on your workspace.

1. Navigate to a log list.

2. Hover over the header bar and right-click.

3. From the menu, select **Export all rows**
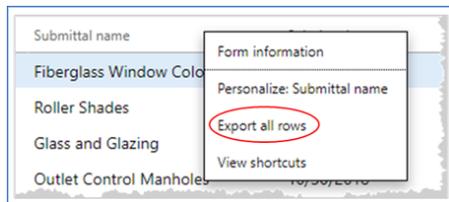


4. In the Export to Excel dialog, select **Download**
   Depending on your browser settings, the content may require confirmation to open, save or cancel.

 PM4+

At any point print to downloading your records you can choose to cancel this action by choosing the **Cancel** button at the bottom of the dialog

# Print grid

Print grid gives you the option to print your log lists to a format of your choice, one of which is output to excel. If you wish to print to any other format there are additional parameters that you can set for the Header and footer, Report format and Page output.

1.  Navigate to a log list.

2.  From the action pane open the **OPTIONS** tab.

3.  In the **SHARE** group of fields choose **Print** grid
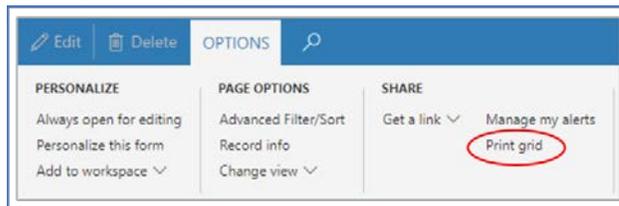


The Print grid dialog opens.

4.  In the **Page output** fast tab, select .xlsx from the Save as drop-down list.
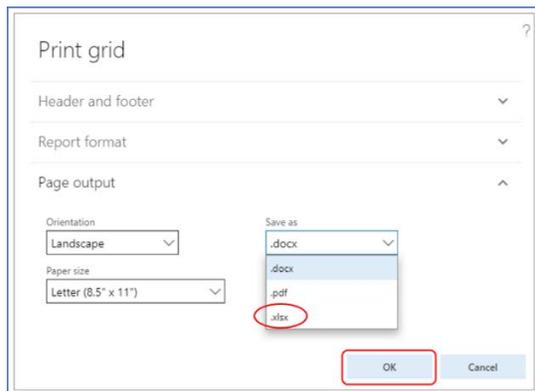


5.  Click **OK**

The file is downloaded, and you should get notification in your browser. Depending on your browser, you may have options to save to another location or open immediately and save.