



PM4 + Partners Knowledge Articles

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

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Sorting, Filtering and Exporting Lists

When you are presented with numerous items in a list it may be easier to view, locate and work with items if you sorted and/or filtered a list a different way than the default order. This topic shows you how to sort and filter the records in any list you can access in the PM4+ Partner Portal.

You will 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
- Filter and search a list using the Filter box
- Create an advanced filtered list that can be maintained in the Filters pane and added to your workspace
- Reset or clear a filter
- Export records to an Excel workbook



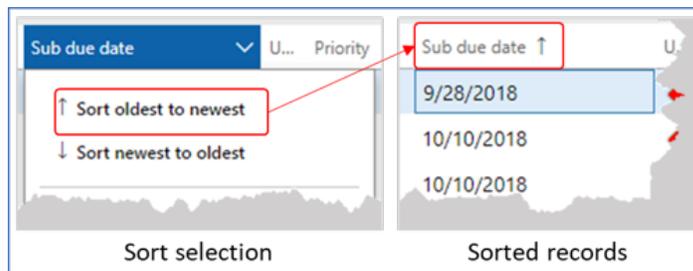
Sort records by a list's column

You can only sort one column in a list. Inter-sorting of records is not available. For example, you cannot filter 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 will 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.



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.



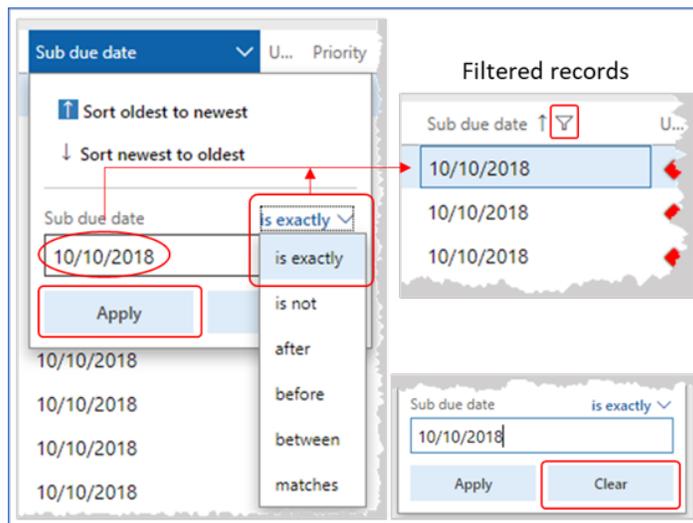
Filtering records

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**



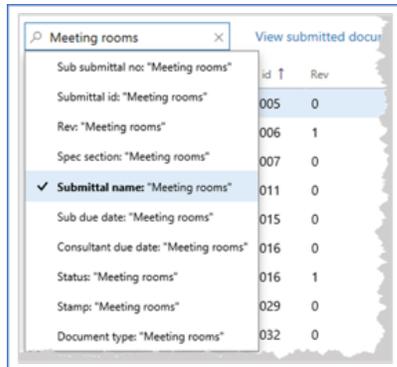
The system applies the filter and displays the filtered list. If a sort value on the column was selected, the system retains that value as well.

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

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 will 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.

Filtering with the advanced filter in the navigation pane

Advanced filtering is accessed by selecting the funnel icon (🔍) in the navigation bar on the left side of the work area when in a list. The funnel icon is only available if you are viewing a list accessed through the navigation pane. You cannot see the funnel icon if you are in a tabbed list in your Workspace.

With advanced filtering, you can apply multiple filters on a list by choosing the fields to filter. The advantage to filtering this way is that certain fields provide you with a list of values to choose from, whereas filtering at the column header requires you to know the exact filter value to input. For example, if you picked the **Status** field, you would see a drop-down arrow. Click the drop-down arrow to display a list of valid statuses which can be selected.

Note: While the drop-down selection provides the value name, sometimes the name displayed in the criteria box is the value ID. For example, if you select "Project Role" the system shows "5637144624".

When you use the Advanced filter on a list, you can select a record to view the details. The filtered list can be seen by clicking the list icon in the navigation bar. You can then just click on an item in this list to display the details of that record.

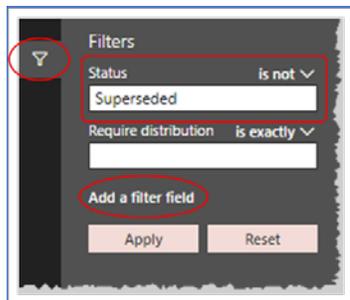
1. Choose a list you want to filter.

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

2. Click the funnel icon from the navigation bar on the left side of the workspace area.

The Filters pane slides out to the right of the navigation bar and the size of the work area size decreases. Any filters active on the list that you have chosen display. The column(s) where the filter is active have a funnel beside the column name as well.

Note: See Remove or Clear an existing filter subtopic for more information on resetting or clearing filters.



3. Click the **Add a filter field** action link.

The filter box displays.

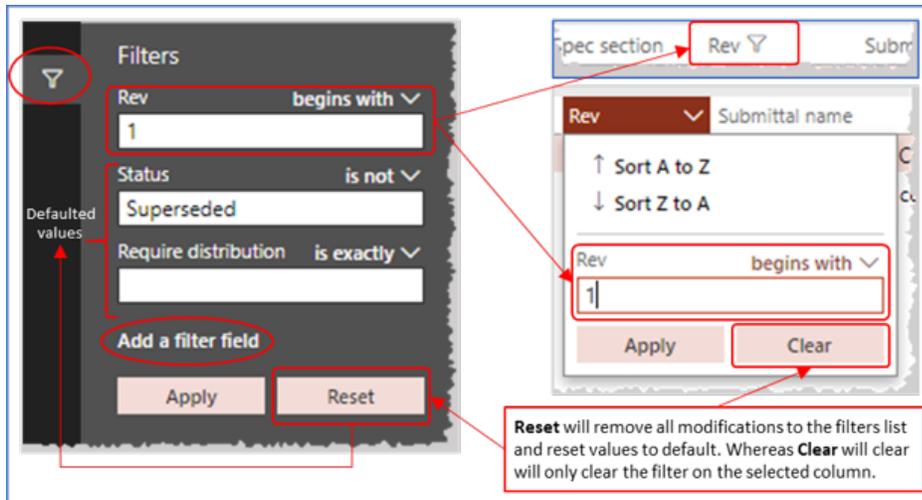
4. Click the **drop-down arrow** and choose a value from the list, or input a value in the filter box.
5. Click the **drop-down arrow** above the corresponding filter box to choose a comparison operator.

These values change depending on the type of field you have chosen. See the comparison operator table for values and their uses.

6. Repeat until all filter values are selected and defined.
7. Click **Apply** to apply the filter(s) to the list.

Resetting or clearing a filter

When you are viewing a list and you click the filter (funnel) icon in the navigation bar at the side, all the filters currently applied to the list display in the Filters pane. As well, filtered columns display the funnel icon beside the column header label.



1. To clear the filter value, find the column with a funnel displayed by the column label.
2. Click the drop-down arrow.
3. Click the **Clear** button.
Note: A list retains all the sort and filter values until you clear them.
4. To reset the Filters in the filter pane, open the pane.
5. Click the **Reset** button.
The filters are reset to their default values.

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 will 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 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 will not be able to see this command if you are looking at one of the log lists 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.

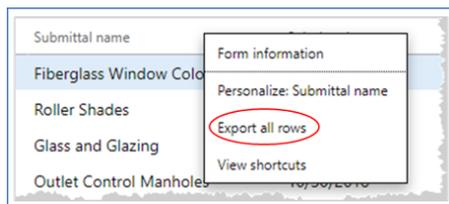


3. Under **Export to Excel**, select the log.
For example, if you are at the Submittal log, the menu item says **Submittal**
4. In the "Export to Excel" dialog box, select **Download**.
Depending on your browser settings, the content may require confirmation to open, save, or cancel.

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**

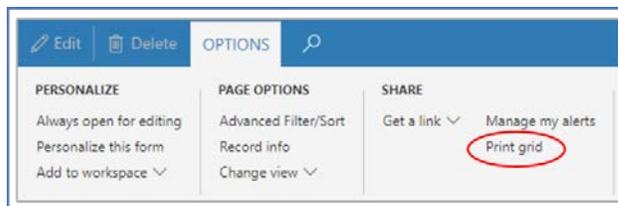


4. In the Export to Excel dialog, select **Download**
Depending on your browser settings, the content may require confirmation to open, save or cancel.
At any point print to downloading your records you can choose to cancel this action by choosing the **Cancel** button at the bottom of the dialog

Print grid

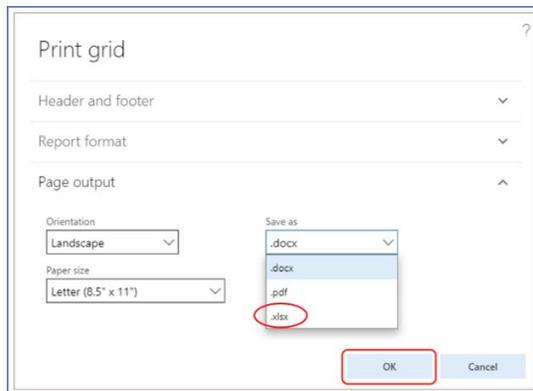
Print grid gives you the option to print your log lists to a format of your choice, one of which is output to excel. If you wish to print to any other format there are additional parameters that you can set for the Header and footer, Report format and Page output.

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.