Using the export function enables you to produce a list of selected Krimson project details in excel. This can be useful if you are looking at a large number of projects or if you want to use excel to sort the data eg by deadline date.

1. Click on the Export Icon
2. Select Filtered items. You can export all items or you can use a filter first (eg all applications requiring RS approval). Note that export selection can be saved and then retrieved by using the ‘Yes, use template’ option.
3. Recommended - Include internal columns (Converis internal IDs will be exported)

What do you want to export?

All attributes listed within each application are listed in alphabetical order in the Project Application list. Note, all relations i.e. ‘PI name’ and or ‘Funder and Scheme’ are listed separately under ‘Relation type’. See screenshot 2 below.

The example below selects 1 attribute; PI’s first and last name and his/her organisation within Project Application entity:

4. Select at least one attribute from ‘Project Application’ list i.e. Project title
5. Select Relation type i.e. Project Application—Principal Investigator – Business Card
   a. Select at least one attribute, i.e. Last Name
   a. Select at least one attribute, i.e. Name
7. ‘Save as Template’ (it can be done before or after you click on the Export button) - this function is optional, but it will enable you to undertake the same export without selecting attributes and relations
   a. Add Template name
   b. Add Description
8. Click Export
Note, the Export feature only enables you to export relations such as PI name or Funder and Scheme separately. The current workaround is to export all information required in a number of spreadsheet and then ‘glue’ the spreadsheets together, by using Vlookup function for example.