

List functionality in projects

- Overview of list functionalities
- Create
- Delete, View and Edit
- Bulk Actions
 - Bulk Export
- Search
- Filters
- Sorting a list

Access to OLS

The "Provide access to OLS" functionality was removed from the Beneficiary module. The relevant wiki pages will be updated accordingly.

 The illustrations in the provided Wiki pages are for consultation purpose only and may not always reflect the latest implementation.

This page explains the common functionality available in sections containing lists of items in the Beneficiary Module. For example, the list of [Participating organisations](#), [mobility activities](#), or [Associated persons](#).

It describes features that allow the users to handle items in lists, either individually or in bulk.

For a quick overview of Navigation and basic functionalities in the Beneficiary module, please watch the [eLearning video](#).

Prerequisites

- Certain options are only available to users or [project contacts](#) with specific access rights. For example **Edit** access is required to edit or delete items in a list.

Overview of list functionalities

Lists in a project have the following general functionalities and options:

1. **List title** - includes the number of items available
2. **Bulk Actions** button - allows to apply a specific operation to multiple list items, at the same time.
3. **Create** button - allows you to add an item to the list, such as an organisation, a mobility activity, a contact, etc.

The **Create** button is inactive if:

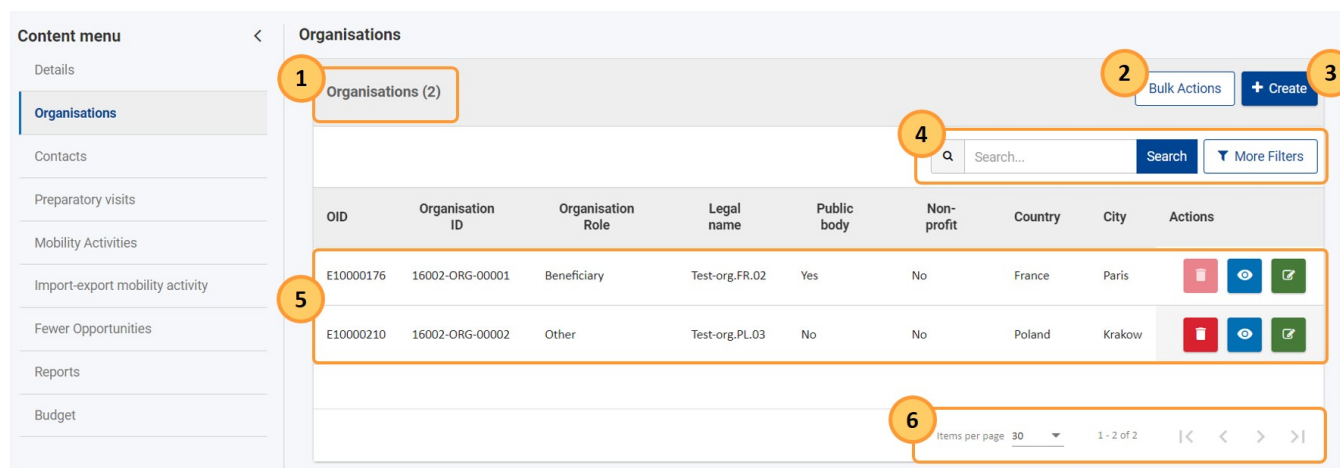
- a user has no **Edit** access in the project, or
- adding an item to the list is not allowed, depending on the list and action type of the project.



Additional buttons may be available for a list, depending on the list viewed.

4. **Search** and **More Filters** - allow you to identify specific items in a list.
5. **List of items** - displays the items available as per the selection in the **Content menu**, with the option to **sort the listed items** and the options to **Delete, View and/or Edit** an item
 - depending on the list viewed, additional actions may be available, for example the **Duplicate** option for [mobility activities](#) in KA1 projects or the **Select** option for [participants in ESC51](#)
6. **Browse** and **Items per page** - allow to change the number of items displayed on the page and to navigate to previous or next pages

Here is an example of a list of **Organisations** in a KA122-VET project, for a contact with **Edit** access in the project.



The screenshot shows the 'Organisations' list in a KA122-VET project. The interface includes a 'Content menu' on the left with 'Organisations' selected. The main area displays a table with columns: OID, Organisation ID, Organisation Role, Legal name, Public body, Non-profit, Country, City, and Actions. Two items are listed: E10000176 (Beneficiary, Test-org.FR.02, Yes, No, France, Paris) and E10000210 (Other, Test-org.PL.03, No, No, Poland, Krakow). The table has a search bar and 'More Filters' button. At the bottom, there's a pagination bar showing 'Items per page: 30' and '1 - 2 of 2'.

Here is an example of the **List of mobility activities** in a KA122-VET project, call year 2022, where you can also **Duplicate** the mobility activities.

Mobility activities

List of mobility activities (11)

Bulk Actions

+ Create

Mobility activity ID

Activity type

Participant's first name

Participant's last name

P

016503-MOB-6

Long-term learning mobility of VET learners (ErasmusPro)

Elisabeta

NAME

test2@testmail.com

France

Poland

18-08-2022

28-11-2022

Access to OLS

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Closet his message

Here is an example of the list of the **Activities** of an ESC51 project from call 2023. In addition to the Delete, View and Edit options, the **orange Select** icon is available.

Activities

Selection details

Please select an activity

Activities (2)

+ Create

Q

Search...

Search

Bulk Actions

More Filters

Activity ID	Activity title	Activity type	Host organisation legal name	Country of activity	City of Activity	No of participants	
A1	Activity "ABC"	Individual Volunteering	Test-org.DE.01	Germany	Munchen	3	<div><div></div><div></div><div></div><div></div><div>Select</div></div>
A2	Activity "DEF"	Volunteering Teams	Test-org.DE.01	Germany	Munchen	0	<div><div></div><div></div><div></div><div></div><div></div></div>

Items per page 30

1 - 2 of 2

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Create

The **Create** button allows you to add an item to the list, such as an organisation, a mobility activity, etc. Click on **Create** to open a new screen, where you can add the relevant details and then **Save** the item.

If adding an item to a list is not allowed, the **Create** button will be **inactive**.

Organisations

Organisations (2)

Bulk Actions

+ Create

OID	Organisation ID	Organisation Role
E10000176	16002-ORG-00001	Beneficiary

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Organisations

ORGANISATION

OID

Organisation Role

Other

Organisation ID *

16503-ORG-00003

OID organisation

☐

Type of organisation *

Value missing

Legal name *

Value missing

Business name

Full legal name (national language)

Back

Save

Delete, View and Edit

Once items are added to the list, the following icons become available under the **Actions** column:

- Delete** - click on this icon in line with the item you wish to delete, and follow the onscreen instructions.
- View** - click on this icon to open the details of the selected item in read-only mode. All fields are greyed out and you will not be able to change any details.
- Edit** - open the details of the selected item in edit mode. Make the desired changes, then click on the **Save** button at the bottom of the screen to save the updated information.

If editing or deleting an item from the list is not possible, the relevant icon is greyed out.

Organisations (3)

Bulk Actions

+ Create

Q

Search...

Search

More Filters

OID	Organisation ID	Organisation Role	Legal name	Public body	Non-profit	Country	City	Actions
E10000164	16503-ORG-00003	Other	Test-org.FR.01	No	No	France	Paris	<div>1</div> <div>2</div> <div>3</div>
E10000210	16503-ORG-00002	Other	Test-org.PL.03	No	No	Poland	Krakow	
E10000176	16503-ORG-00001	Beneficiary	Test-org.FR.02	Yes	No	France	Paris	

Bulk Actions

Bulk Actions allow you to apply a specific operation to multiple list items at the same time. The available options vary, depending on the project section and on your permissions in the project. The following bulk actions may be available:

- **Export PDF**
- **Export CSV**
- **Export XLS**
- **Delete**
- **Resend Participant Report requests** - only available for certain projects

To perform a bulk action, take the following steps:

1. Click on the **Bulk Actions** button at the top of the list. Note that, as long as the bulk actions option is activated, the button name changes to **Disable Bulk Actions**.

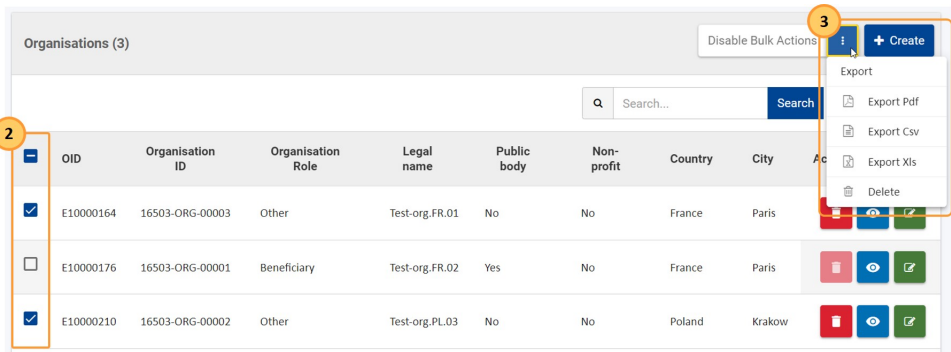


2. Check the relevant tick boxes next to the items you want to select. Where applicable, you will see additional filters at the top of the list (e.g., in the mobility activities section).
3. Click on the **three dots** next to the **Disable Bulk Actions** button to open the list of available actions and select the desired action.
 - The options available depend on the list and on your permissions.
 - Depending on your selection, the action is applied immediately to all the selected items, or you may need to take additional steps. For instance, a confirmation is required if you wish to **delete** several items in bulk, as the items are **permanently removed**.



Take note

If no items are selected, the bulk options to choose from are disabled.

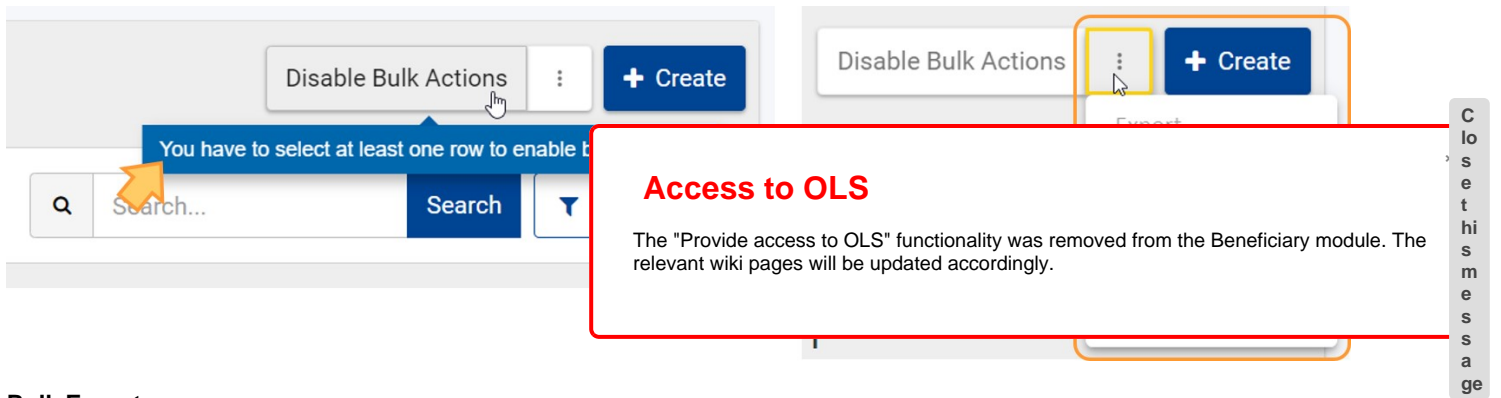


4. Click on the **Disable Bulk Actions** button to deactivate the bulk actions again.



Take Note

When rolling over the **Disable Bulk Actions** button, you are prompted to select at least one row to enable bulk actions, if none are yet selected. If no items are selected, the bulk options available are disabled.

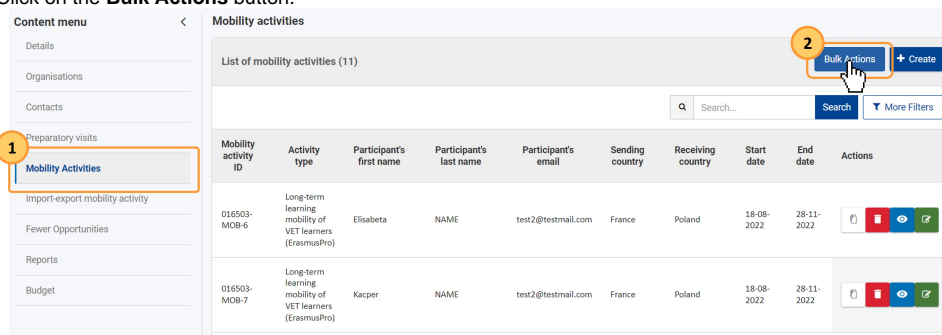


Bulk Export

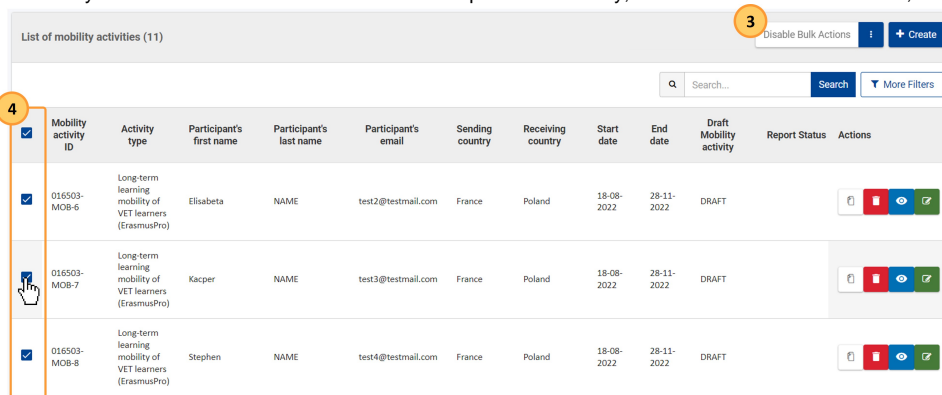
The functionality to export multiple list items is available, where you can select either the full list or selected items to be exported in one of the following formats: PDF, CSV, or XLS.

In this example, we will export the list of mobility activities.

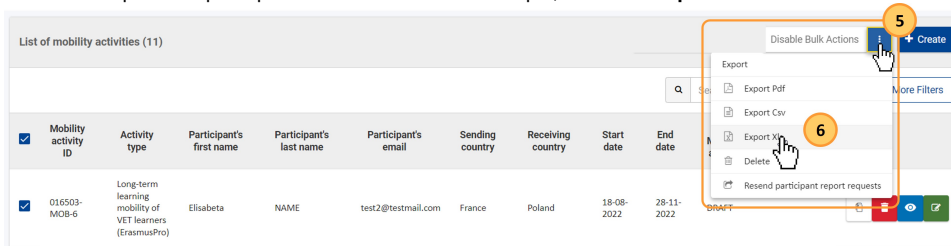
1. Select **Mobility Activities** from the Content Menu.
2. Click on the **Bulk Actions** button.



3. The button changes to **Disable Bulk Actions**, with three dots indicating a drop-down menu option.
4. Individually select the **check boxes** of the items to export. Alternatively, to select all the items in the list, tick the check box in the table heading.



5. Once one or more items have been selected, the **drop-down** menu button (three dots) becomes active and the options to export the list in various formats are enabled.
6. Choose the specific export option from the list. In our example, we select **Export XLS**.



7. The file automatically downloads and will be available in the default download folder on your computer. The file opens in the format you selected (xls and csv formats in your spreadsheet software, and PDF in your selected PDF reader).

File Home Insert Page Layout Formulas Data Review View Developer Acrobat Tell me what you want to do...										
H28										
A	B	C	D	E	F	G	H	I	J	K
Mobility activity ID	Activity type	Participant's first name	Participant's last name	Participant's email	Sending country	Receiving country	Start date	End date	Draft Mobility activity	Report Status
016503-MOB-6	Long-term learning mobility of VET learners (ErasmusPro)	Elisabeta	NAME	test3@testmail.com						
016503-MOB-7	Long-term learning mobility of VET learners (ErasmusPro)	Kacper	NAME	test4@testmail.com						
016503-MOB-8	Long-term learning mobility of VET learners (ErasmusPro)	Stephen	NAME	test5@testmail.com						
016503-MOB-1	Long-term learning mobility of VET learners (ErasmusPro)	Mary	NAME	test6@testmail.com						
016503-MOB-2	Long-term learning mobility of VET learners (ErasmusPro)	Anna	NAME	test7@testmail.com						
016503-MOB-3	Long-term learning mobility of VET learners (ErasmusPro)	Miles	NAME	test7@testmail.com	France	Poland	2022-08-18	2022-11-28	DRAFT	
016503-MOB-4	Long-term learning mobility of VET learners (ErasmusPro)	George	NAME	test8@testmail.com	France	Poland	2022-08-18	2022-11-28	DRAFT	
016503-MOB-5	Long-term learning mobility of VET learners (ErasmusPro)	Hannah	NAME	test9@testmail.com	France	Poland	2022-08-18	2022-11-28	DRAFT	
016503-MOB-11	Long-term learning mobility of VET learners (ErasmusPro)	Benjamin	NAME	test10@testmail.com	France	Poland	2022-08-18	2022-11-28	DRAFT	
016503-MOB-9	Long-term learning mobility of VET learners (ErasmusPro)	Kate	NAME	test11@testmail.com	France	Poland	2022-08-18	2022-11-28	DRAFT	
016503-MOB-10	Long-term learning mobility of VET learners (ErasmusPro)	Harry	NAME	test12@testmail.com	France	Poland	2022-08-18	2022-11-28	DRAFT	

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Search

The search field allows you to add a general text, to narrow down the list of results.

1. Type at least two characters in the search box and click the **Search** button, to retrieve the items matching your criteria.
2. The **number of items found** is updated and displayed at the top of the list. The found item(s) is (are) displayed in the list.
3. To remove a search filter and return to the full list, click on the **X** in the **Search** box.

 You can combine the Search functionality with the [More Filters](#) options.

Contacts (6)

Bulk Actions







+ Create

1

X

Search

More Filters

Organisation OID	Organisation legal name	First Name	Last Name	Position	Email	Telephone 1	Beneficiary	Legal Representative	Primary Contact	OLS admini	Actions
E10000164	Test-org.FR.01	Eric	NAME		test3@testmail.com	+322222222	No	No	No	Yes	  
E10000164	Test-org.FR.01	Gisela	NAME		test1@testmail.com	+322222222	No	No	Yes	Yes	  

Contacts (1)

Bulk Actions

+ Create




3

X

Search



More Filters

Found 1 (total 6)

Organisation OID	Organisation legal name	First Name	Last Name	Position	Email	Telephone 1	Beneficiary	Legal Representative	Primary Contact	OLS administrator	Ar pr m	Actions
E10000210	Test-org.PL.03	Joanna	NAME		test6@testmail.com	+3434343434	No	No	Yes	Yes	Ec	  

Items per page 30

1 - 1 of 1






Filters

Filters help you refine your search to find specific items that match several search criteria from the data displayed in the list.

1. Click on the **More filters** button, to display the filtering criteria.

List of mobility activities (11)

Mobility activity ID	Activity type	Participant's first name	Participant's last name	Participant's email	Sending country	Receiving country	Start date	End date	Draft	Report Status	Actions
016503-MOB-6	Long-term learning mobility of VET learners (ErasmusPro)	Elisabeta	NAME	test2@testmail.com	France	Poland	18-08-2022	28-11-2022	DRAFT		  

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2. The button name changes to **Less filters**. Click on **Less filters** to hide the filters again.
3. One filter for each column in the list will become available. There are two types of filters, and they can be combined to narrow down the results:
- **Text fields:** add at least 2 characters, then click outside the text field. The list is automatically updated with the matching items containing the text you inserted.
 - **Drop-down fields:** select one value from the list. The list is automatically updated with the matching items containing the text you have selected.

List of mobility activities (11)




Bulk Actions

Create

Search...

Search

Less Filters

Mobility activity ID	Activity type	Participant's first name	Participant's last name	Participant's email	Sending country	Receiving country	Start date	End date	Draft	Report Status	Actions
							dd/mm/yyyy	dd/mm/yyyy			
016503-MOB-6	Long-term learning mobility of VET learners (ErasmusPro)	Elisabeta	NAME	test2@testmail.com	France	Poland	18-08-2022	28-11-2022	DRAFT		  

4. Provide your criteria in the relevant filters. The list is updated as per the set filter options. In our example, we provided a **Participant's first name** and combined it with the filter for **Sending country: France**.
5. The selected filtering criteria are displayed next to the **Less Filters** button.

Mobility activities

List of mobility activities (1)




Bulk Actions

Create

Search...

Search

Participant..., Sending... Less Filters

Mobility activity ID	Activity type	Participant's first name	Participant's last name	Participant's email	Sending country	Receiving country	Start date	End date	Draft	Report Status	Actions
		Kacper			France		dd/mm/yyyy	dd/mm/yyyy			
016503-MOB-7	Long-term learning mobility of VET learners (ErasmusPro)	Kacper	NAME	test2@testmail.com	France	Poland	18-08-2022	28-11-2022	DRAFT		  

Items per page 30 1 - 1 of 1

6. To remove a filtering criteria, click on the **X** next to its name.

Mobility activities

List of mobility activities (1)




Bulk Actions

Create

Search...

Search

Participant..., Sending... Less Filters

Mobility activity ID	Activity type	Participant's first name	Participant's last name	Participant's email	Sending country	Receiving country	Start date	End date	Draft	Report Status	Actions
		Kacper			France		dd/mm/yyyy	dd/mm/yyyy			
016503-MOB-7	Long-term learning mobility of VET learners (ErasmusPro)	Kacper	NAME	test2@testmail.com	France	Poland	18-08-2022	28-11-2022	DRAFT		  

Items per page 30 1 - 1 of 1



Even if you hide the filters (by clicking on the **Less Filters** button), the previously applied filtering criteria remain active if they have not been removed, and the results are displayed accordingly. The applied filtering criteria also remain visible next to the **More Filters** button.

Mobility activities

List of mobility activities (1)

Bulk Actions

+ Create

Mobility activity ID	Activity type	Participant's first name	Participant's last name	P
016503-MOB-7	Long-term learning mobility of VET learners (ErasmusPro)	Kacper	NAME	tes

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Closet his message

Sorting a list

You can sort a list by clicking on a column header (1st click, ascending, 2nd click, descending, 3rd click, off). An arrow indicating the current sort sequence is displayed next to the selected column header.

In this example, the list of organisations is sorted in ascending order, by **Mobility Activity ID**.

List of mobility activities (11)

Bulk Actions

+ Create

Q

Search...

Search

More Filters

Mobility activity ID	Activity type	Participant's first name	Participant's last name	Participant's email	Sending country	Receiving country	Start date	End date	Draft Mobility activity	Report Status	Actions
016503-MOB-9	Long-term learning mobility of VET learners (ErasmusPro)	Kate	NAME	test12@testmail.com	France	Poland	18-08-2022	28-11-2022	DRAFT		<div><div></div><div></div><div></div><div></div></div>
016503-MOB-8	Long-term learning mobility of VET learners (ErasmusPro)	Stephen	NAME	test20@testmail.com	France	Poland	18-08-2022	28-11-2022	DRAFT		<div><div></div><div></div><div></div><div></div></div>
016503-MOB-7	Long-term learning mobility of VET learners (ErasmusPro)	Kacper	NAME	test3@testmail.com	France	Poland	18-08-2022	28-11-2022	DRAFT		<div><div></div><div></div><div></div><div></div></div>

Related Articles

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- [Project list](#)
- [Project details](#)
- [Budget in projects](#)
- [Notifications to project contacts](#)
- [My Projects](#)
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