

# Document Index by Tag (SDI Report by Tag)

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Sometimes we are trying to generate a document index by equipment:

				Vendor Document Register	Sizing Calculations	General Arrangement Drawings	Instrument Data Sheet	Inspection and Test Plan	Operating and Maintenance Manual	Hardness Test Report	Material Test Certificates	Shipping And Packing Documents	Manufacturing Data Book	Doc Codes and Doc Code Names	
Equipment	Line #	Tag #	Item/Model	A01	C02	D01	D16	I04	K05	M18	M20	N02	S06		
	1	Tag1	Check Steel Valve	NULL	1	2.d	3-	NULL	2*	NULL	1	X+	X		
	2	Tag2	Check Steel Valve	NULL	X+	2.d	3-	NULL	2*	NULL	1	X+	X		
	3	Tag3	Check Steel Valve	NULL	X+	2.d	3-	NULL	2*	NULL	1	X+	X		
	4	Tag4	Check Steel Valve	NULL	3-	2.d	3-	NULL	2*	NULL	1	X+	X		
	5	Tag5	Ball Steel Valve	NULL	3-	NULL	3-	NULL	NULL	NULL	1	X+	X		
	6	Tag6	Ball Steel Valve	NULL	3-	NULL	3-	NULL	NULL	NULL	1	X+	X		
	7	Tag7	Ball Steel Valve	NULL	3-	NULL	3-	NULL	NULL	NULL	1	X+	X		
	8	Tag8	Ball Steel Valve	NULL	3-	NULL	3-	NULL	NULL	NULL	1	X+	X		
	9	Tag9	Ball Steel Valve	NULL	3-	NULL	3-	NULL	NULL	NULL	1	X+	X		
	10	Tag10	Butterfly Valve	NULL	3-	NULL	3-	NULL	2*	NULL	1	X+	X		
	11	Tag11	Butterfly Valve	NULL	3-	NULL	3-	NULL	2*	NULL	1	X+	X		

This option for *SDI Report* templates combines the list of equipment units with card metadata in a pivot-style output by doc code.

## List of equipment units

On the Index template, in order to include the equipment units, use the variable options from the `<Start_AllUnits>/<End_AllUnits>` arrays (under the **TYPE=CoverPage** tab in the XLS Template Variables document).

See below:

<code>&lt;Start_AllUnits&gt;</code>	
<code>&lt;AllUnits.SupplierLineNumber&gt;</code>	Supplier Line Number Value
<code>&lt;AllUnits.CustomerLineNumber&gt;</code>	Customer Line Number Value
<code>&lt;AllUnits.Model&gt;</code>	Item/Model Value
<code>&lt;AllUnits.Tag&gt;</code>	Tag Value
<code>&lt;AllUnits.SubSupplier&gt;</code>	Sub-Supplier Value
<code>&lt;AllUnits.CustomerPoNumber&gt;</code>	Customer PO Number Value
<code>&lt;AllUnits.CustomerPoRevNumber&gt;</code>	Customer PO REV Value
<code>&lt;AllUnits.ShipDate&gt;</code>	Shipment Date
<code>&lt;AllUnits.Milestone&gt;</code>	Milestone Date
<code>&lt;AllUnits.MajorTagX&gt;</code>	MajorTagX Value (X is ID of MajorTag field)
<code>&lt;AllUnits.CustomX&gt;</code>	CustomX Value (X is ID of custom Equipment Field)
<code>&lt;AllUnits.CombinationUnitX&gt;</code>	CombinationUnitX Value (X is ID of CombinationUnit Field, integer starting from 1)
<code>&lt;End_AllUnits&gt;</code>	

## Grouping

The parameter **GroupBy=FIELD** must be included in <Start\_AllUnits>.

The available grouping fields are: SupplierLineNumber, CustomerLineNumber, CustomerPoNumber, CustomerPoRevNumber, Model, Tag, ShipDate, Milestone, SubSupplier, CustomX, MajorTagX

For example if you wish to list all units from your equipment list you should use the parameter |GroupBy=SupplierLineNumber. And if you wish to group data from multiple units into a single field (list) output you use the parameter |GroupBy=Tag.

## Doc code list and card meta-data

Variables for doc code list and card cross-reference metadata should be included between the arrays <CStart\_DocumentCodesCount> / <CEnd\_DocumentCodesCount>, which must be placed in a separate column at the start and at the end of the list of variables.

<b>SUPPLIER DOCUMENT REGISTER</b>				
Client :	<Customer_Name>			
P.O. Number :	<PO_Number>			
P.O. Date:	<Order_Date>			
Project :	<Project_Name>			
<Supplier_Short_Name> f	<Order>			
			<CStart_DocumentCodesCount>	<CEnd_DocumentCodesCount>
Line #	Tag #	Item/Model	<DocumentCodesCount.DocCodeName>	
<Start_AllUnits  groupby=Tag>				
<AllUnits.CustomerLineNumber>	<AllUnits.Tag>	<AllUnits.Model>	<DocumentCodesCount.DocCode>	
<End_AllUnits>			<AllUnits.DocCodeCards.<DocumentCodesCount.Index>.Status_with_Suffix>	

## Doc codes

Project doc codes can be listed horizontally using the available *DocumentCodesCount* variables:

Pivot Output - Units to Codes	
<CStart_DocumentCodesCount>	Column output. Repeated for every doc code in code list Columns with start/end will be REMOVED. N/A and included in codes will be shown if enabled on SDI pop up. "--" will not be shown.
<DocumentCodesCount.IndexNum>	Sequential number from 1 to max count of customer's submittal records among all documents
<DocumentCodesCount.DocCode>	Document Doc Code
<DocumentCodesCount.DocCodeName>	Document Doc Code Name
<DocumentCodesCount.DocCodeWithComments>	Document Doc Code with comments in parentheses for "N/A" or "Include in" code options
<DocumentCodesCount.DocCodeComment>	Doc Code comments in parentheses for "N/A" or "Include in" code options
<DocumentCodesCount.DocCodeLists>	This list includes the primary doc code, secondary doc codes, included doc codes. By default values are separated by comma and sorted alphabetically.
<CEnd_DocumentCodesCount>	

For example, if you wish to show the doc codes and the doc code names the variables should be included in the column header.

<b>SUPPLIER DOCUMENT REGISTER</b>				
Client :	<Customer_Name>			
P.O. Number :	<PO_Number>			
P.O. Date:	<Order_Date>			
Project :	<Project_Name>			
<Supplier_Short_Name> F <Order>				
			<CStart_Document CodesCount>	<End_Document CodesCount>
Line #	Tag #	Item/Model	<DocumentCodesCount.DocCodeName>	
<DocumentCodesCount.DocCode>				
<Start_AllUnits   groupby=Tag>				
<AllUnits.CustomerLineNumber>	<AllUnits.Tag>	<AllUnits.Model>	<AllUnits.DocCodeCards.<DocumentCodesCount.Index>.Status_with_Suffix>	
<End_AllUnits>				

## Card metadata

Card cross-reference metadata variables can be added using the following format:

<AllUnits.DocCodeCards.<DocumentCodesCount.Index>.\*\*\*\*\*> (where \*\*\*\* should be replaced by a cover page variable).

Most variables are supported, but if there are no results, check the list of available variables listed on the **TYPE=Index** tab in the **Pivot Output - Units to Codes** section.

If multiple cards match the code to unit matrix, the data will output in a comma separated list for each card. For example, if 3 cards matched the code and unit and variable is status, the output would be *card1.status, card2.status, card3.status*.

For example, if you wish to show the card status, the variables should be placed on the same line as the *AllUnits* variables.

<b>SUPPLIER DOCUMENT REGISTER</b>				
Client :	<Customer_Name>			
P.O. Number :	<PO_Number>			
P.O. Date:	<Order_Date>			
Project :	<Project_Name>			
<Supplier_Short_Name> F <Order>				
			<CStart_Document CodesCount>	<End_Document CodesCount>
Line #	Tag #	Item/Model	<DocumentCodesCount.DocCodeName>	
<DocumentCodesCount.DocCode>				
<Start_AllUnits   groupby=Tag>				
<AllUnits.CustomerLineNumber>	<AllUnits.Tag>	<AllUnits.Model>	<AllUnits.DocCodeCards.<DocumentCodesCount.Index>.Status_with_Suffix>	
<End_AllUnits>				

This layout will show the status of each card cross-referenced with each equipment unit.

				Vendor Document Register	Sizing Calculations	General Arrangement Drawings	Doc Codes and Doc Code Names
Equipment	Line #	Tag #	Item/Model	A01	C02	D01	
	1	Tag1	Check Steel Valve	NULL	1	2 .d	Card status cross-reference with equipment units
	2	Tag2	Check Steel Valve	NULL	X +	2 .d	
	3	Tag3	Check Steel Valve	NULL	X +	2 .d	
	4	Tag4	Check Steel Valve	NULL	3 -	2 .d	
	5	Tag5	Ball Steel Valve	NULL	3 -	NULL	
	6	Tag6	Ball Steel Valve	NULL	3 -	NULL	
	7	Tag7	Ball Steel Valve	NULL	3 -	NULL	
	8	Tag8	Ball Steel Valve	NULL	3 -	NULL	
	9	Tag9	Ball Steel Valve	NULL	3 -	NULL	
	10	Tag10	Butterfly Valve	NULL	3 -	NULL	
	11	Tag11	Butterfly Valve	NULL	3 -	NULL	

# Job reports

SDI report by tag is available on [Job SDI Reports](#), however the report must be configured to output a single project per worksheet in order for this array to work properly on job reports.