

# Using Cover Page Variables to Build Source Documents

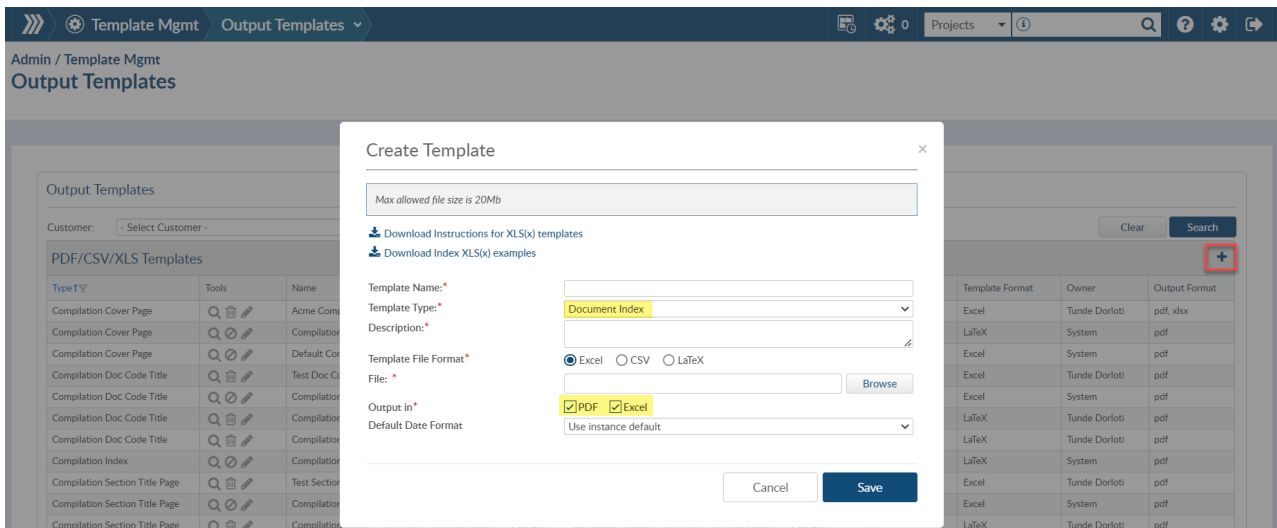
09/16/2024 1:44 pm MDT

DocBoss wasn't really designed to build source documents directly, but our document index templates certainly bring that thought forward.

Note:

- Files can be submitted as PDF and Excel
- Templates are uploaded as DOCUMENT INDEX type
- Cover page variables should be used in the template

## Upload your source document template as a Document Index



For instructions on how to upload a template, see our article [here](#).

## Add an SDI Report to your project

## Index Reports & Compilations

Compilations List  
Type: Show Both

Name	Description	CD Required	CD Number	Type	Tools
Installation Drawings			0	Package	

No more pages | Show on Page: 20

SDI Reports Please click "generate" button to get XLS/CSV or PDF generated documents

Name	Description	Generate PDF	Tools	Download

No more pages | Show on Page: 20

Show Disabled

- Ensure the Template Type is "Document Index" and select the source template you uploaded in Output Templates

### Add SDI Report

Name: \*

Description:

Template Type: \*

PDF Template:

CSV/XLS Template:

Show N/A Codes

Show Included Codes

Show Manual Codes w/o Cards

Show Cards in All States (except Z) ?

Show Obsolete Cards in Index

## Link the SDI Report to a Doc Code

- On the Code List, select the applicable level and set the Type for the related code to "SDI Report" and link the SDI to the doc code

Cards

### Code List (Requirements)

Grid Rows Colors

Select	Tools	Doc Code	Doc Code Name ↑	Level	Required	Type	Stage List
<input type="checkbox"/>		A01	Document Register	Order	1/1	Generated (Wolfe PA)	IFI
<input type="checkbox"/>		B01	General Arrangement Drawings	Item/Model (TE)	13/13	Generated (Wolfe PA)	IFI
<input type="checkbox"/>		I04	Inspection and Test Plan	Order	1/1	Generated (Sub-Supplier)	IFI
<input type="checkbox"/>		D16	Instrument Data Sheet	Tag (TE)	5/5	SDI Report	IFI
<input type="checkbox"/>		C02	Sizing Calculations (Tag(TE))	Order	2/2	Generated (Wolfe PA)	IFI

No more pages Show on Page: 100

Apply Download CSV Template

For instructions on how to link an SDI template to the doc code, see our article [here](#).

- If there is more than one card created for the SDI Report (i.e. tag level was selected), the SDI Reports can be attached to each applicable card in card list.

Card List

ACME Doc Code IN (D16 Instrument Data Sheet x)

ACME Doc Code: - Select or type ahead - Reference: - Select Reference - Level: - Select Level - Tagged Units: - Select Unit - Sub-Supplier: - Select Sub-Sup

Stage: - Select Stage - ACME Status: - Select Status - State: - Select State - Submittal: - Select Submittal - Internal Code: - Select Internal C

Location: - Select Location - Routing: - Select Routing - Compilation: ? - Select compilation -

Due to ACME:  
 Expected Return to Wolfe PA:  
 Days since last request: Keywo

Grid Rows Colors How to use auto-generated values for

Card List

Required	Tools	Card Name
<input checked="" type="checkbox"/>		D16 N/A
<input checked="" type="checkbox"/>		D16 N2/1
<input checked="" type="checkbox"/>		D16 N2/1
<input checked="" type="checkbox"/>		D16 R1/N
<input checked="" type="checkbox"/>		D16 R2/N

Select the SDI Report Document to Attach

Name  Search + Add

Select	Doc Name ↑	Description
<input checked="" type="radio"/>	PDF XLS BOTH	Data Sheets

No more pages Show on Page: 20

Add Cover Page / Stamps Cover page only (no stamp)

Attach

No more pages Show on Page: 10 Items on page: 5 Total Found: 5

Show Completed Cards  Show NULL Cards  Hide Unrequired Cards  Hide Merged Cards

Filter Set: - Select Filter Set - + Create Filter Set Update Filter Set Edit Filter Set Delete Filter Set

- Once the SDI Reports have been linked, the source documents will be automatically generated and they can be downloaded in the selected format (Excel/PDF or both) from documents column and the cards will be available to send to the customer in Outgoing Submittals grid.

## Card List

ACME Doc Code IN ( D16 Instrument Data Sheet x)

ACME Doc Code:  Reference:  Level:  Tagged Units:  Sub-Supplier:   
 The ONLY Sub-Supplier

Stage:  ACME Status:  State:  Submittal:  Internal Code:   
Location:  Routing:  Compilation:

Due to ACME:  
 Expected Return to Wolfe PA:  
Days since last request:  Keyword:

[Grid Rows Colors](#) [How to use auto-generated values for Doc No. \(ACME\) and Doc No. \(Wolfe PA\)](#) Other Actions

Card List										
	Required	Tools	Card Name(Auto) ↑	Doc Code	Title	Document	Doc No. (Wolfe PA)	Due to ACME	Status (Co...	Status (ACME)
<input type="checkbox"/>	<input checked="" type="checkbox"/>		D16_N/A	D16	Instrument Data Sheet		1234-02-D16-001	26/03/2021	X(+)	X
<input type="checkbox"/>	<input checked="" type="checkbox"/>		D16_N2/1295	D16	Instrument Data Sheet		1234-02-D16-001	26/03/2021	X(+)	X
<input type="checkbox"/>	<input checked="" type="checkbox"/>		D16_N2/1296	D16	Instrument Data Sheet		1234-02-D16-001	26/03/2021	X(+)	X
<input type="checkbox"/>	<input checked="" type="checkbox"/>		D16_R1/N2/202	D16	Instrument Data Sheet		1234-02-D16-001	26/03/2021	X(+)	X
<input type="checkbox"/>	<input checked="" type="checkbox"/>		D16_R2/N2/208	D16	Instrument Data Sheet		1234-02-D16-001	26/03/2021	X(+)	X