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

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For instructions on how to upload a template, see our article here.

Add an SDI Report to your project

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Index Reports & Compilations

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

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CSV/XLS Template:	Data Sheet Document [XLS] (Tunde Dorloti)	~
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	Show Manual Codes w/o Cards	
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Link the SDI Report to a Doc Code

- On the Code List, select the 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)

Code	List (Requirements)						
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For instructions on how to link an SDI template to the doc code, see our articlehere.

- 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.

ACME Doc Code: -Select or type ahead · Reference: Select Reference · Level: Select Level · Tagged Units: Select Unit · Sub-Supplier: Select State State: Select Stage · ACME Status: Select Status · State: Select State · Submittal: Select Submittal · Internal Code: Select Internal Code:	ACME Doc Code	IN (D16 Instrument Data She	et ×)								
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- 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

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