How can I make my final books VDI 2770 compliant?

VDI 2770 is a German standard for final submittal of vendor documentation. The focus is on FINAL PACKAGES, not the day-to-day submittals for approval etc.

The goal of VDI compliance is to create a stand alone package PER TAG. There will be many duplicate documents submitted - for example - an instruction manual which applies to many tags will be include in EACH package.

DocBoss supports the creation of a single package through our compilation module. Users can create the compilation layout, and choose to generate one compilation per tag (by linking the compilation to the code, and setting the code level to TAG).

DocBoss also supports building the compilation as a set of original files (vs as a single PDF deliverable).

For VDI compliance there are some items which users must configure in their system.

1. Use (or create) the VDI specific **Internal Code List**

You must have a set of internal codes containing the VDI standard Category/Class. If your customer has their own set of codes (separate from VDI classes) you will map the internal to customer codes. Otherwise - you'll just use the internal codes directly on the project. Below is the list of codes per the VDI standard - you can copy and upload them as a VDI internal list.

Group	Category (CLASS)	Code
Identification	Identification	01-01
	Technical specifications	02-01
	Drawings, plans	02-02
Technical specifications	Parts	02-03
	Certificates	02-04
	Mounting, disassembly	03-01
	Operation	03-02
Activity-related documents	General safety	03-03
	Inspection, maintenance, testing	03-04
	Repair	03-05
	Spare parts	03-06
Contract documents	Contract documents	04-01

Note the GROUP field. This shoudl be added to your system as a custom doc code field. Likely as a LIST field so you can just choose the correct value (and avoid any typos). Note this may be done on the Internal VDI code list (once) and inherited to your project.

If you need to make the submittal in German - below you'll find the doc code names (Classes) in German.

ClassID	ClassName (de)	ClassName (en)
01-01	Identifikation	Identification
02-01	Technische Spezifikation	Technical specification
02-02	Zeichnungen, Pläne	Drawings, plans
02-03	Bauteile	Components
02-04	Zeugnisse, Zertifikate, Bescheinigungen	Certificates
03-01	Montage, Demontage	Assembly, disassembly
03-02	Bedienung	Operation
03-03	Allgemeine Sicherheit	General safety
03-04	Inspektion, Wartung, Prüfung	Inspection, maintenance
03-05	Instandsetzung	Repair
03-06	Ersatzteile	Spare parts
04-01	Vertragsunterlagen	contract documents

2. Enable Exceptional Handling.

VDI specifies that all documents must be delivered as PDF/A. To ensure this is the case, you must ensure your docs are PDF/A prior to upload, and tell DocBoss to skiip processing. To do so - you must set your project so that ALL UPLOADS are EXCEPTIONAL (on Project Template). This can also be enabled as a default on the project template if you have one for VDI projects.

3. The Identification ID

This is the Tag in DocBoss.

3. Add columns for other metadata.

You may have a summary and other keywords - like product group etc. This should be created as custom doc/card code columns. You need to update your "VDI XML Index" template to include them.

4. Build Compilation

a. When building the compilation, you may wish to create a folder hierarchy for the group then include the classes, or just directly use classes. Ensure you add an INDEX (specifically your "VDI XML Index" to each section of your compilation.

b. Configure your compilation to generate as a ZIP. Include a TOC, and select the Template for "VDI TOC". This ensures your top level will contain the PDF for VDI2770_main.

c. Link to Code, and set level to Tag. This will generate a separate package for each tag.

Some upcoming development items to fully comply with the spec include an option to zip of each document card (including the native, active and XML coversheet), generate the TOC in PDF/A format, and name all of the coversheets to the convention VDI2770_metadata.xml. We also are working with the XML Structure - so please contact us if you have a VDI2770 project and we will help you create the XML coversheets and compilation indexes.