Job based Supplier Document Indexes

09/16/2024 1:44 pm MDT

To run an SDI report for multiple projects, you will need to have assigned the "Job" to each of the projects you want to include in the report. For information on creating and assigning jobs, see our article here.

Once you have assigned all projects to the Job, navigate to the Settings/Admin Menu > Lists > Jobs.



Click on the Edit SDI Report icon to create and generate the report.

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1. Name the SDI Report

- 2. Add a description (Optional)
- 3. Select your template and options
- 4. Select your Sort by Options, this will sort your included projects by Name / Sales Order / or PO Number
- 5. Save

Name: *	Demo Job SDI	
Description:	2	
Template:	Demo SDI w History (2019-01-10) [XLS] (Brad Bowyer)	~
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	 One project per worksheet 	
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You will be taken back to the Jobs List screen,

1. Click the Generate Icon to generate the report.

2. Once the report is finished generating an icon will appear to allow you to Download the Report.

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Hide disabled jobs

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Below is an example of the report with the option of One Project per Worksheet- with tabs for each project.

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34	K05	J887-1091-K05-0005-001	Operating and	3110-FA-1115, 3140-FA-1116	012345-1-K05-0005-001	x	IFI	000	N/A	9/2/2016	000	T-001						
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Below is an example of the report without the option of One Project per Worksheet. This puts all information on a single page, which you can then filter down, if desired.

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37	KOS	J887-1091-K05-0008-001	Operating and	3110-FA-1111, 3110-FA-1112.	012345-1-K05-0008-001	x	IFI	000	N/A	9/2/2016	000	T-001							
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Note: The job based SDI report pulls in all projects assigned to the job, whether they are active or completed. To remove completed projects from the Job SDI, remove the Job from the main screen of the project.