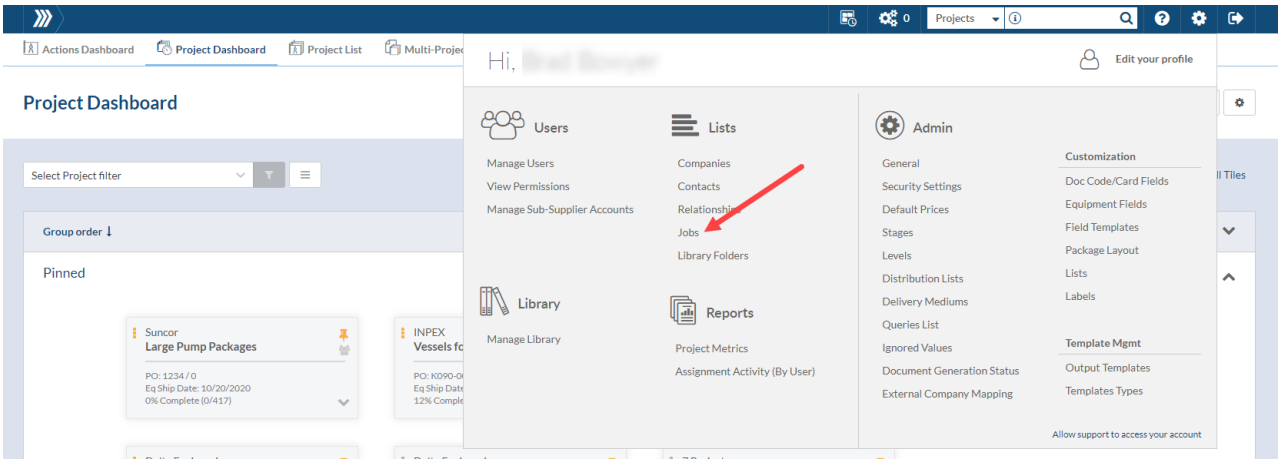
Job based Supplier Document Indexes

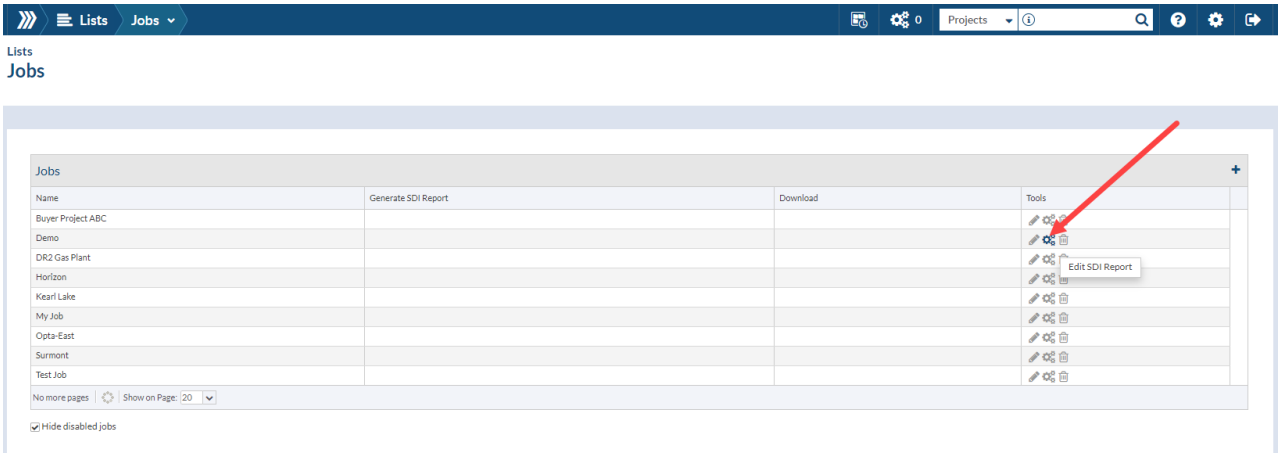
09/16/2024 1:44 pm MDT

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.



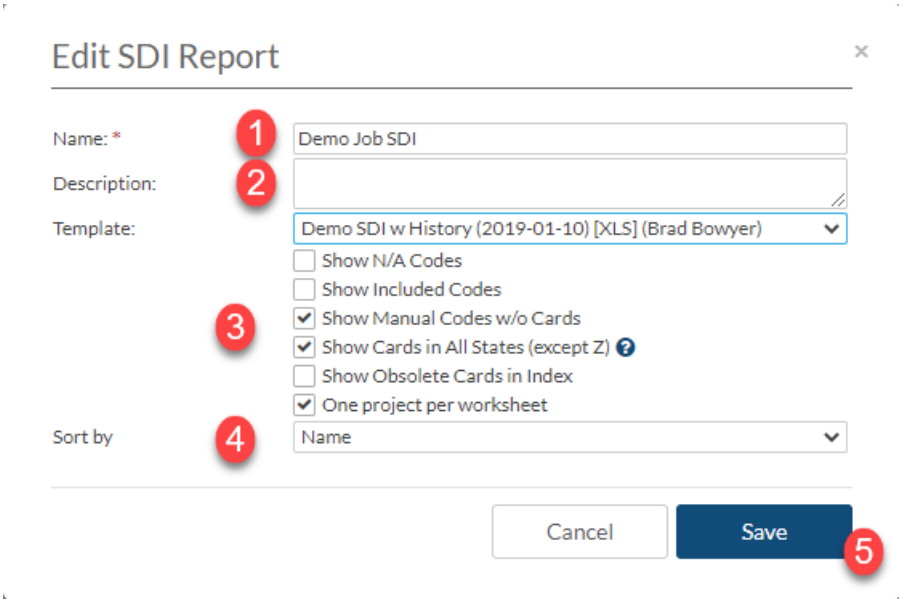
1. Name the SDI Report

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

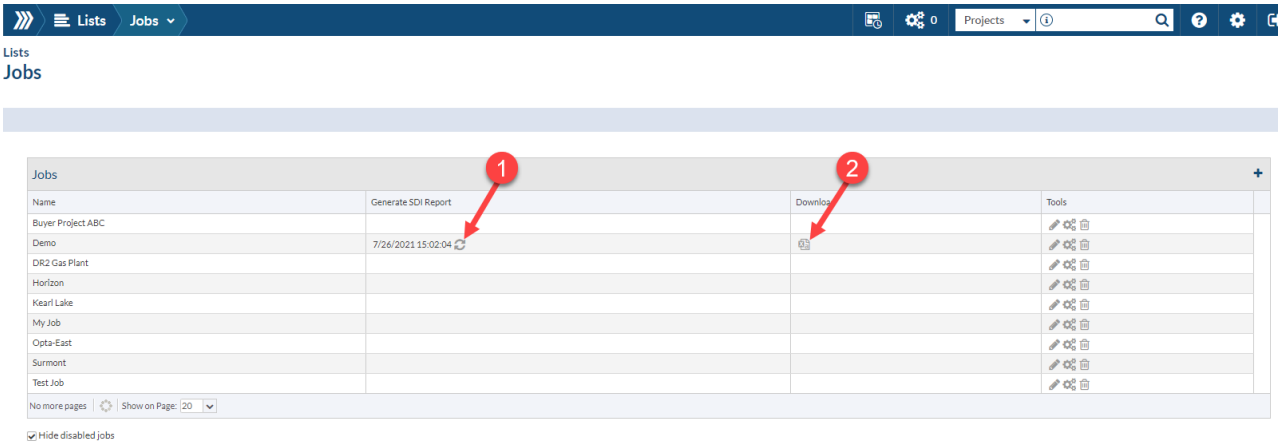
5. Save



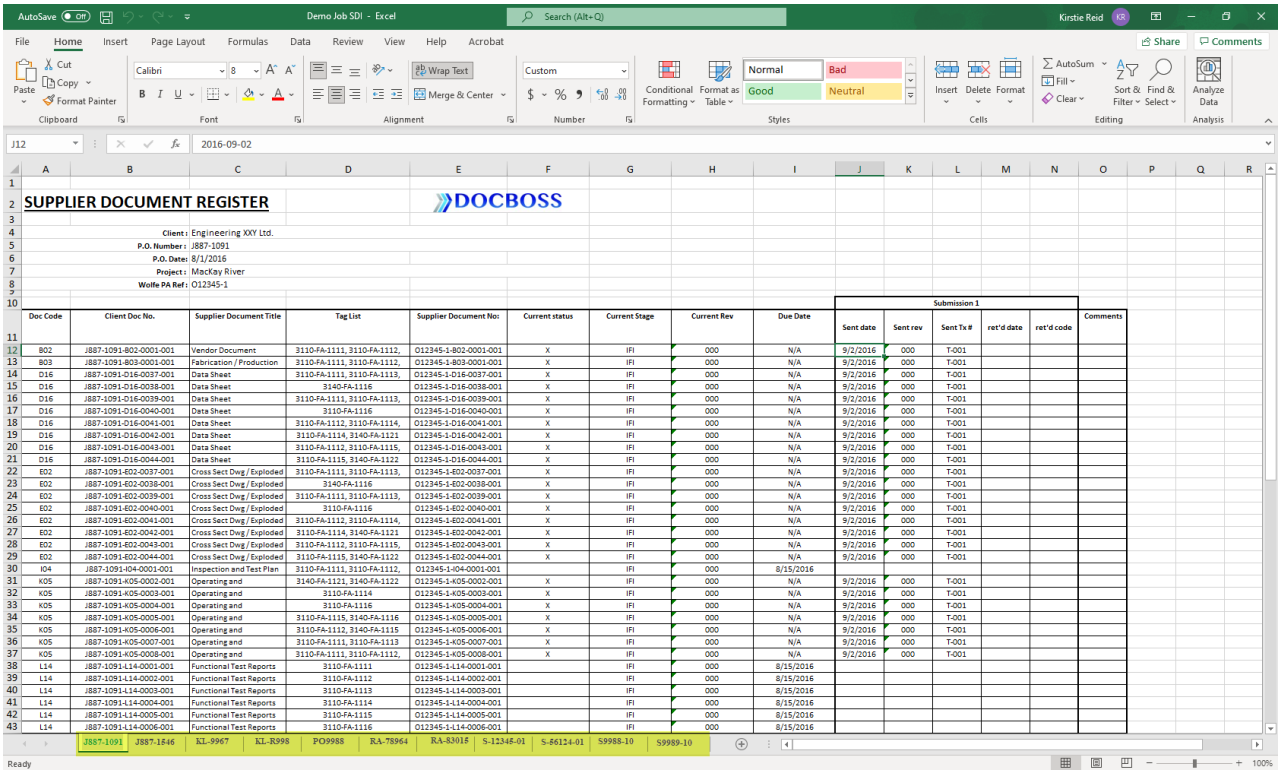
You will be taken back to the Jobs List screen,

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.



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



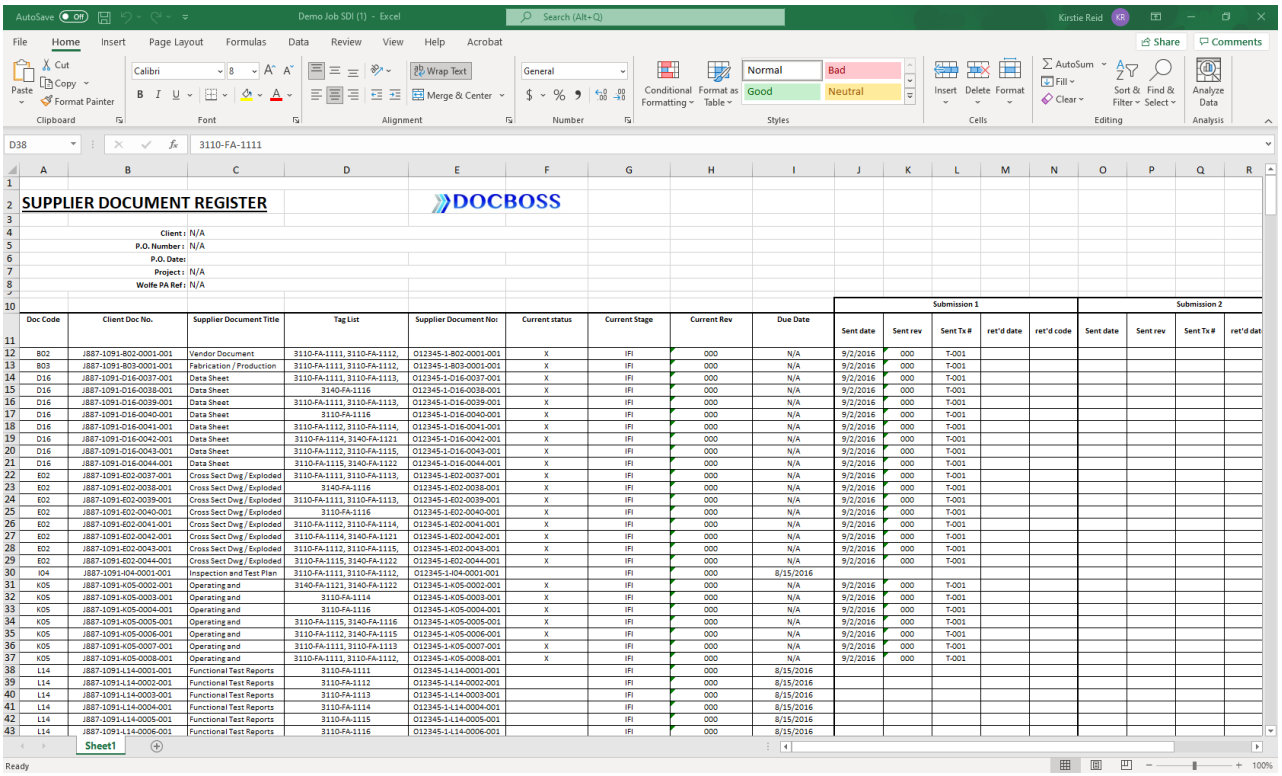
SUPPLIER DOCUMENT REGISTER

DOCBOSS

Client: Engineering XXY Ltd.
P.O. Number: J887-1091
P.O. Date: 8/1/2016
Project: MacKay River
Wolfe PA Ref: O12345-1

Doc Code	Client Doc No.	Supplier Document Title	Tag List	Supplier Document No:	Current status	Current Stage	Current Rev	Due Date	Submission 1					Comments
									Sent date	Sent rev	Sent Tx #	ret'd date	ret'd code	
B02	J887-1091-B02-0001-001	Vendor Document	3110-FA-1111, 3110-FA-1112,	012345-1-B02-0001-001	X	IFI	000	N/A	9/2/2016	000	T-001			
B03	J887-1091-B03-0001-001	Fabrication / Production	3110-FA-1111, 3110-FA-1112,	012345-1-B03-0001-001	X	IFI	000	N/A	9/2/2016	000	T-001			
D16	J887-1091-D16-0037-001	Data Sheet	3110-FA-1111, 3110-FA-1113,	012345-1-D16-0037-001	X	IFI	000	N/A	9/2/2016	000	T-001			
D16	J887-1091-D16-0038-001	Data Sheet	3140-FA-1116	012345-1-D16-0038-001	X	IFI	000	N/A	9/2/2016	000	T-001			
D16	J887-1091-D16-0039-001	Data Sheet	3110-FA-1111, 3110-FA-1113,	012345-1-D16-0039-001	X	IFI	000	N/A	9/2/2016	000	T-001			
D16	J887-1091-D16-0040-001	Data Sheet	3110-FA-1116	012345-1-D16-0040-001	X	IFI	000	N/A	9/2/2016	000	T-001			
D16	J887-1091-D16-0041-001	Data Sheet	3110-FA-1112, 3110-FA-1114,	012345-1-D16-0041-001	X	IFI	000	N/A	9/2/2016	000	T-001			
D16	J887-1091-D16-0042-001	Data Sheet	3110-FA-1114, 3140-FA-1121	012345-1-D16-0042-001	X	IFI	000	N/A	9/2/2016	000	T-001			
D16	J887-1091-D16-0043-001	Data Sheet	3110-FA-1112, 3110-FA-1115,	012345-1-D16-0043-001	X	IFI	000	N/A	9/2/2016	000	T-001			
D16	J887-1091-D16-0044-001	Data Sheet	3110-FA-1115, 3140-FA-1122	012345-1-D16-0044-001	X	IFI	000	N/A	9/2/2016	000	T-001			
E02	J887-1091-E02-0037-001	Cross Sect Dwg / Exploded	3110-FA-1111, 3110-FA-1113,	012345-1-E02-0037-001	X	IFI	000	N/A	9/2/2016	000	T-001			
E02	J887-1091-E02-0038-001	Cross Sect Dwg / Exploded	3140-FA-1116	012345-1-E02-0038-001	X	IFI	000	N/A	9/2/2016	000	T-001			
E02	J887-1091-E02-0039-001	Cross Sect Dwg / Exploded	3110-FA-1111, 3110-FA-1113,	012345-1-E02-0039-001	X	IFI	000	N/A	9/2/2016	000	T-001			
E02	J887-1091-E02-0040-001	Cross Sect Dwg / Exploded	3110-FA-1116	012345-1-E02-0040-001	X	IFI	000	N/A	9/2/2016	000	T-001			
E02	J887-1091-E02-0041-001	Cross Sect Dwg / Exploded	3110-FA-1112, 3110-FA-1114,	012345-1-E02-0041-001	X	IFI	000	N/A	9/2/2016	000	T-001			
E02	J887-1091-E02-0042-001	Cross Sect Dwg / Exploded	3110-FA-1114, 3140-FA-1121	012345-1-E02-0042-001	X	IFI	000	N/A	9/2/2016	000	T-001			
E02	J887-1091-E02-0043-001	Cross Sect Dwg / Exploded	3110-FA-1112, 3110-FA-1115,	012345-1-E02-0043-001	X	IFI	000	N/A	9/2/2016	000	T-001			
E02	J887-1091-E02-0044-001	Cross Sect Dwg / Exploded	3110-FA-1115, 3140-FA-1122	012345-1-E02-0044-001	X	IFI	000	N/A	9/2/2016	000	T-001			
I04	J887-1091-I04-0001-001	Inspection and Test Plan	3110-FA-1111, 3110-FA-1112,	012345-1-I04-0001-001		IFI	000	8/15/2016						
K05	J887-1091-K05-0002-001	Operating and	3140-FA-1121, 3140-FA-1122	012345-1-K05-0002-001	X	IFI	000	N/A	9/2/2016	000	T-001			
K05	J887-1091-K05-0003-001	Operating and	3110-FA-1114	012345-1-K05-0003-001	X	IFI	000	N/A	9/2/2016	000	T-001			
K05	J887-1091-K05-0004-001	Operating and	3110-FA-1116	012345-1-K05-0004-001	X	IFI	000	N/A	9/2/2016	000	T-001			
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			
K05	J887-1091-K05-0006-001	Operating and	3110-FA-1112, 3140-FA-1115	012345-1-K05-0006-001	X	IFI	000	N/A	9/2/2016	000	T-001			
K05	J887-1091-K05-0007-001	Operating and	3110-FA-1111, 3110-FA-1113	012345-1-K05-0007-001	X	IFI	000	N/A	9/2/2016	000	T-001			
K05	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			
L14	J887-1091-L14-0001-001	Functional Test Reports	3110-FA-1111	012345-1-L14-0001-001		IFI	000	8/15/2016						
L14	J887-1091-L14-0002-001	Functional Test Reports	3110-FA-1112	012345-1-L14-0002-001		IFI	000	8/15/2016						
L14	J887-1091-L14-0003-001	Functional Test Reports	3110-FA-1113	012345-1-L14-0003-001		IFI	000	8/15/2016						
L14	J887-1091-L14-0004-001	Functional Test Reports	3110-FA-1114	012345-1-L14-0004-001		IFI	000	8/15/2016						
L14	J887-1091-L14-0005-001	Functional Test Reports	3110-FA-1115	012345-1-L14-0005-001		IFI	000	8/15/2016						
L14	J887-1091-L14-0006-001	Functional Test Reports	3110-FA-1116	012345-1-L14-0006-001		IFI	000	8/15/2016						

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.



SUPPLIER DOCUMENT REGISTER

DOCBOSS

Client: N/A
P.O. Number: N/A
P.O. Date:
Project: N/A
Wolfe PA Ref: N/A

Doc Code	Client Doc No.	Supplier Document Title	Tag List	Supplier Document No:	Current status	Current Stage	Current Rev	Due Date	Submission 1					Submission 2			
									Sent date	Sent rev	Sent Tx #	ret'd date	ret'd code	Sent date	Sent rev	Sent Tx #	ret'd dat
B02	J887-1091-B02-0001-001	Vendor Document	3110-FA-1111, 3110-FA-1112,	012345-1-B02-0001-001	X	IFI	000	N/A	9/2/2016	000	T-001						
B03	J887-1091-B03-0001-001	Fabrication / Production	3110-FA-1111, 3110-FA-1112,	012345-1-B03-0001-001	X	IFI	000	N/A	9/2/2016	000	T-001						
D16	J887-1091-D16-0037-001	Data Sheet	3110-FA-1111, 3110-FA-1113,	012345-1-D16-0037-001	X	IFI	000	N/A	9/2/2016	000	T-001						
D16	J887-1091-D16-0038-001	Data Sheet	3140-FA-1116	012345-1-D16-0038-001	X	IFI	000	N/A	9/2/2016	000	T-001						
D16	J887-1091-D16-0039-001	Data Sheet	3110-FA-1111, 3110-FA-1113,	012345-1-D16-0039-001	X	IFI	000	N/A	9/2/2016	000	T-001						
D16	J887-1091-D16-0040-001	Data Sheet	3110-FA-1116	012345-1-D16-0040-001	X	IFI	000	N/A	9/2/2016	000	T-001						
D16	J887-1091-D16-0041-001	Data Sheet	3110-FA-1112, 3110-FA-1114,	012345-1-D16-0041-001	X	IFI	000	N/A	9/2/2016	000	T-001						
D16	J887-1091-D16-0042-001	Data Sheet	3110-FA-1114, 3140-FA-1121	012345-1-D16-0042-001	X	IFI	000	N/A	9/2/2016	000	T-001						
D16	J887-1091-D16-0043-001	Data Sheet	3110-FA-1112, 3110-FA-1115,	012345-1-D16-0043-001	X	IFI	000	N/A	9/2/2016	000	T-001						
D16	J887-1091-D16-0044-001	Data Sheet	3110-FA-1115, 3140-FA-1122	012345-1-D16-0044-001	X	IFI	000	N/A	9/2/2016	000	T-001						
E02	J887-1091-E02-0037-001	Cross Sect Dwg / Exploded	3110-FA-1111, 3110-FA-1113,	012345-1-E02-0037-001	X	IFI	000	N/A	9/2/2016	000	T-001						
E02	J887-1091-E02-0038-001	Cross Sect Dwg / Exploded	3140-FA-1116	012345-1-E02-0038-001	X	IFI	000	N/A	9/2/2016	000	T-001						
E02	J887-1091-E02-0039-001	Cross Sect Dwg / Exploded	3110-FA-1111, 3110-FA-1113,	012345-1-E02-0039-001	X	IFI	000	N/A	9/2/2016	000	T-001						
E02	J887-1091-E02-0040-001	Cross Sect Dwg / Exploded	3110-FA-1116	012345-1-E02-0040-001	X	IFI	000	N/A	9/2/2016	000	T-001						
E02	J887-1091-E02-0041-001	Cross Sect Dwg / Exploded	3110-FA-1112, 3110-FA-1114,	012345-1-E02-0041-001	X	IFI	000	N/A	9/2/2016	000	T-001						
E02	J887-1091-E02-0042-001	Cross Sect Dwg / Exploded	3110-FA-1114, 3140-FA-1121	012345-1-E02-0042-001	X	IFI	000	N/A	9/2/2016	000	T-001						
E02	J887-1091-E02-0043-001	Cross Sect Dwg / Exploded	3110-FA-1112, 3110-FA-1115,	012345-1-E02-0043-001	X	IFI	000	N/A	9/2/2016	000	T-001						
E02	J887-1091-E02-0044-001	Cross Sect Dwg / Exploded	3110-FA-1115, 3140-FA-1122	012345-1-E02-0044-001	X	IFI	000	N/A	9/2/2016	000	T-001						
I04	J887-1091-I04-0001-001	Inspection and Test Plan	3110-FA-1111, 3110-FA-1112,	012345-1-I04-0001-001		IFI	000	8/15/2016									
K05	J887-1091-K05-0002-001	Operating and	3140-FA-1121, 3140-FA-1122	012345-1-K05-0002-001	X	IFI	000	N/A	9/2/2016	000	T-001						
K05	J887-1091-K05-0003-001	Operating and	3110-FA-1114	012345-1-K05-0003-001	X	IFI	000	N/A	9/2/2016	000	T-001						
K05	J887-1091-K05-0004-001	Operating and	3110-FA-1116	012345-1-K05-0004-001	X	IFI	000	N/A	9/2/2016	000	T-001						
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						
K05	J887-1091-K05-0006-001	Operating and	3110-FA-1112, 3140-FA-1115	012345-1-K05-0006-001	X	IFI	000	N/A	9/2/2016	000	T-001						
K05	J887-1091-K05-0007-001	Operating and	3110-FA-1111, 3110-FA-1113	012345-1-K05-0007-001	X	IFI	000	N/A	9/2/2016	000	T-001						
K05	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						
L14	J887-1091-L14-0001-001	Functional Test Reports	3110-FA-1111	012345-1-L14-0001-001		IFI	000	8/15/2016									
L14	J887-1091-L14-0002-001	Functional Test Reports	3110-FA-1112	012345-1-L14-0002-001		IFI	000	8/15/2016									
L14	J887-1091-L14-0003-001	Functional Test Reports	3110-FA-1113	012345-1-L14-0003-001		IFI	000	8/15/2016									
L14	J887-1091-L14-0004-001	Functional Test Reports	3110-FA-1114	012345-1-L14-0004-001		IFI	000	8/15/2016									
L14	J887-1091-L14-0005-001	Functional Test Reports	3110-FA-1115	012345-1-L14-0005-001		IFI	000	8/15/2016									
L14	J887-1091-L14-0006-001	Functional Test Reports	3110-FA-1116	012345-1-L14-0006-001		IFI	000	8/15/2016									

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.