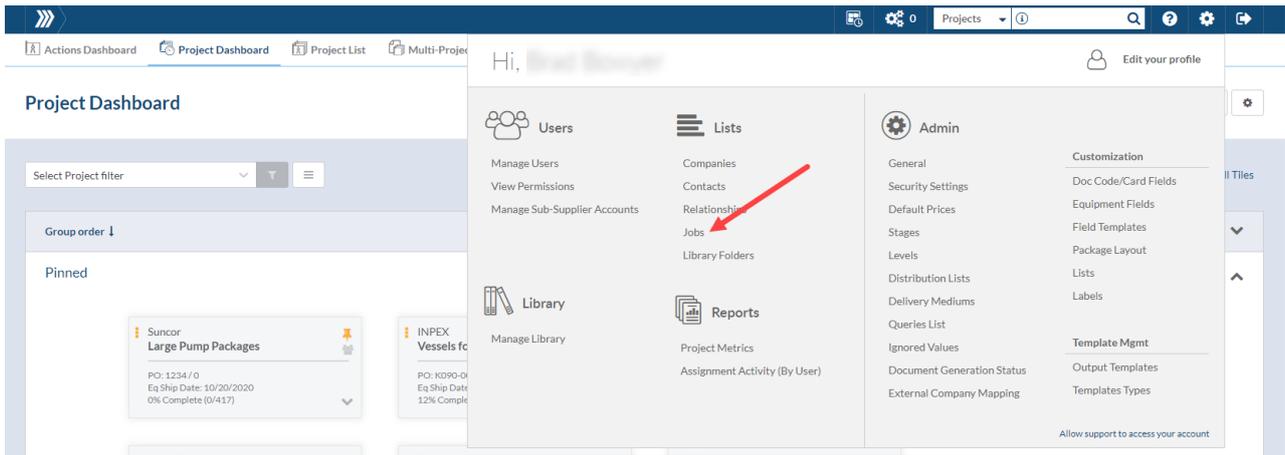


# Job based Supplier Document Indexes

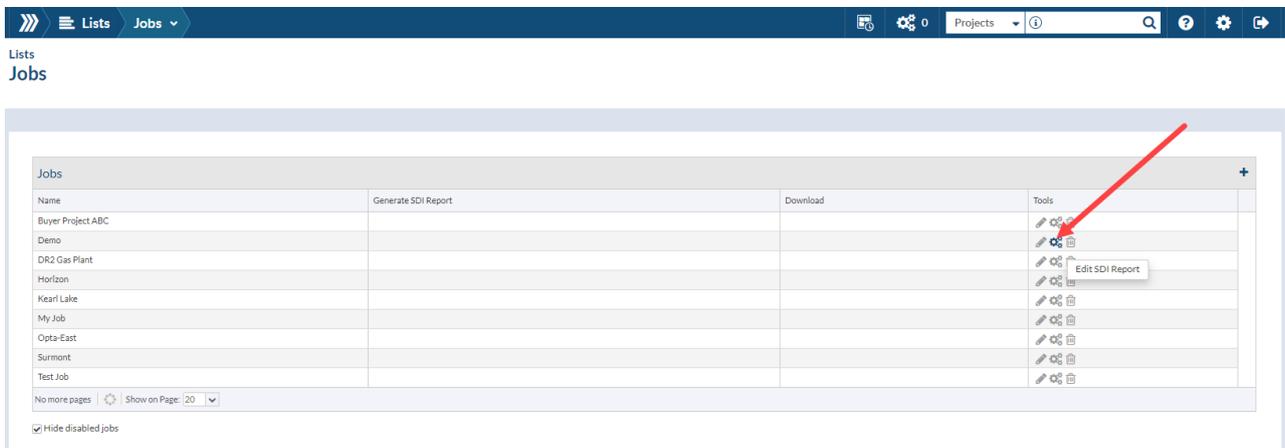
09/16/2024 1:44 pm MDT

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

## Edit SDI Report ×

Name: \* **1**

Description: **2**

Template:  **3**

Show N/A Codes  
 Show Included Codes  
 Show Manual Codes w/o Cards  
 Show Cards in All States (except Z) **3**  
 Show Obsolete Cards in Index  
 One project per worksheet

Sort by **4**

5

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.

Lists  
Jobs

Name	Generate SDI Report <b>1</b>	Download <b>2</b>	Tools
Buyer Project ABC			
Demo	7/26/2021 15:02:04		
DR2 Gas Plant			
Horizon			
Kearl Lake			
My Job			
Opta-East			
Surmont			
Test Job			

No more pages  Show on Page: 20

Hide disabled jobs

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

AutoSave Demo Job SDI - Excel Search (Alt-Q) Kirstie Reid

File Home Insert Page Layout Formulas Data Review View Help Acrobat

Calibri 8 A A Wrap Text Custom Conditional Formatting Normal Bad Good Neutral Insert Delete Format AutoSum Fill Clear Sort & Find & Filter Select Analyze Data

Clipboard Font Alignment Number Styles Cells Editing Analysis

2016-09-02

**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	
802	J887-1091-802-0001-001	Vendor Document	3110-FA-1111, 3110-FA-1112	012345-1-802-0001-001	X	IFI	000	N/A	9/2/2016	000	T001		
803	J887-1091-803-0001-001	Fabrication / Production	3110-FA-1111, 3110-FA-1112	012345-1-803-0001-001	X	IFI	000	N/A	9/2/2016	000	T001		
D16	J887-1091-016-0037-001	Data Sheet	3110-FA-1111, 3110-FA-1113	012345-1-016-0037-001	X	IFI	000	N/A	9/2/2016	000	T001		
D16	J887-1091-016-0038-001	Data Sheet	3110-FA-1116	012345-1-016-0038-001	X	IFI	000	N/A	9/2/2016	000	T001		
D16	J887-1091-016-0039-001	Data Sheet	3110-FA-1111, 3110-FA-1113	012345-1-016-0039-001	X	IFI	000	N/A	9/2/2016	000	T001		
D16	J887-1091-016-0040-001	Data Sheet	3110-FA-1116	012345-1-016-0040-001	X	IFI	000	N/A	9/2/2016	000	T001		
D16	J887-1091-016-0041-001	Data Sheet	3110-FA-1112, 3110-FA-1114	012345-1-016-0041-001	X	IFI	000	N/A	9/2/2016	000	T001		
D16	J887-1091-016-0042-001	Data Sheet	3110-FA-1114, 3140-FA-1121	012345-1-016-0042-001	X	IFI	000	N/A	9/2/2016	000	T001		
D16	J887-1091-016-0043-001	Data Sheet	3110-FA-1112, 3110-FA-1115	012345-1-016-0043-001	X	IFI	000	N/A	9/2/2016	000	T001		
D16	J887-1091-016-0044-001	Data Sheet	3110-FA-1115, 3140-FA-1122	012345-1-016-0044-001	X	IFI	000	N/A	9/2/2016	000	T001		
E02	J887-1091-020-0037-001	Cross Sect Dwg / Exploded	3110-FA-1111, 3110-FA-1113	012345-1-020-0037-001	X	IFI	000	N/A	9/2/2016	000	T001		
E02	J887-1091-020-0038-001	Cross Sect Dwg / Exploded	3140-FA-1116	012345-1-020-0038-001	X	IFI	000	N/A	9/2/2016	000	T001		
E02	J887-1091-020-0039-001	Cross Sect Dwg / Exploded	3110-FA-1111, 3110-FA-1113	012345-1-020-0039-001	X	IFI	000	N/A	9/2/2016	000	T001		
E02	J887-1091-020-0040-001	Cross Sect Dwg / Exploded	3110-FA-1116	012345-1-020-0040-001	X	IFI	000	N/A	9/2/2016	000	T001		
E02	J887-1091-020-0041-001	Cross Sect Dwg / Exploded	3110-FA-1112, 3110-FA-1114	012345-1-020-0041-001	X	IFI	000	N/A	9/2/2016	000	T001		
E02	J887-1091-020-0042-001	Cross Sect Dwg / Exploded	3110-FA-1114, 3140-FA-1121	012345-1-020-0042-001	X	IFI	000	N/A	9/2/2016	000	T001		
E02	J887-1091-020-0043-001	Cross Sect Dwg / Exploded	3110-FA-1112, 3110-FA-1115	012345-1-020-0043-001	X	IFI	000	N/A	9/2/2016	000	T001		
E02	J887-1091-020-0044-001	Cross Sect Dwg / Exploded	3110-FA-1115, 3140-FA-1122	012345-1-020-0044-001	X	IFI	000	N/A	9/2/2016	000	T001		
I04	J887-1091-104-0001-001	Inspection and Test Plan	3110-FA-1111, 3110-FA-1112	012345-1-104-0001-001	X	IFI	000	8/15/2016					
K05	J887-1091-105-0002-001	Operating and	3140-FA-1112, 3140-FA-1122	012345-1-105-0002-001	X	IFI	000	N/A	9/2/2016	000	T001		
K05	J887-1091-105-0003-001	Operating and	3110-FA-1114	012345-1-105-0003-001	X	IFI	000	N/A	9/2/2016	000	T001		
K05	J887-1091-105-0004-001	Operating and	3110-FA-1116	012345-1-105-0004-001	X	IFI	000	N/A	9/2/2016	000	T001		
K05	J887-1091-105-0005-001	Operating and	3110-FA-1115, 3140-FA-1116	012345-1-105-0005-001	X	IFI	000	N/A	9/2/2016	000	T001		
K05	J887-1091-105-0006-001	Operating and	3110-FA-1112, 3140-FA-1115	012345-1-105-0006-001	X	IFI	000	N/A	9/2/2016	000	T001		
K05	J887-1091-105-0007-001	Operating and	3110-FA-1111, 3110-FA-1113	012345-1-105-0007-001	X	IFI	000	N/A	9/2/2016	000	T001		
K05	J887-1091-105-0008-001	Operating and	3110-FA-1115, 3110-FA-1112	012345-1-105-0008-001	X	IFI	000	N/A	9/2/2016	000	T001		
L14	J887-1091-114-0001-001	Functional Test Reports	3110-FA-1111	012345-1-114-0001-001	X	IFI	000	8/15/2016					
L14	J887-1091-114-0002-001	Functional Test Reports	3110-FA-1112	012345-1-114-0002-001	X	IFI	000	8/15/2016					
L14	J887-1091-114-0003-001	Functional Test Reports	3110-FA-1113	012345-1-114-0003-001	X	IFI	000	8/15/2016					
L14	J887-1091-114-0004-001	Functional Test Reports	3110-FA-1114	012345-1-114-0004-001	X	IFI	000	8/15/2016					
L14	J887-1091-114-0005-001	Functional Test Reports	3110-FA-1115	012345-1-114-0005-001	X	IFI	000	8/15/2016					
L14	J887-1091-114-0006-001	Functional Test Reports	3110-FA-1116	012345-1-114-0006-001	X	IFI	000	8/15/2016					

J887-1091 J887-1091 KL-R998 PO9988 RA-78964 RA-R301F S-12345-01 S-66124-01 S9988-10 S9988-10

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.

AutoSave Demo Job SDI (1) - Excel Search (Alt-Q) Kirstie Reid

File Home Insert Page Layout Formulas Data Review View Help Acrobat

Calibri 8 A A Wrap Text General Conditional Formatting Normal Bad Good Neutral Insert Delete Format AutoSum Fill Clear Sort & Find & Filter Select Analyze Data

Clipboard Font Alignment Number Styles Cells Editing Analysis

3110-FA-1111

**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				Comments
									Sent date	Sent rev	Sent Tx #	ret'd date	ret'd code	Sent date	Sent rev	Sent Tx #	
802	J887-1091-802-0001-001	Vendor Document	3110-FA-1111, 3110-FA-1112	012345-1-802-0001-001	X	IFI	000	N/A	9/2/2016	000	T001						
803	J887-1091-803-0001-001	Fabrication / Production	3110-FA-1111, 3110-FA-1112	012345-1-803-0001-001	X	IFI	000	N/A	9/2/2016	000	T001						
D16	J887-1091-016-0037-001	Data Sheet	3110-FA-1111, 3110-FA-1113	012345-1-016-0037-001	X	IFI	000	N/A	9/2/2016	000	T001						
D16	J887-1091-016-0038-001	Data Sheet	3110-FA-1116	012345-1-016-0038-001	X	IFI	000	N/A	9/2/2016	000	T001						
D16	J887-1091-016-0039-001	Data Sheet	3110-FA-1111, 3110-FA-1113	012345-1-016-0039-001	X	IFI	000	N/A	9/2/2016	000	T001						
D16	J887-1091-016-0040-001	Data Sheet	3110-FA-1116	012345-1-016-0040-001	X	IFI	000	N/A	9/2/2016	000	T001						
D16	J887-1091-016-0041-001	Data Sheet	3110-FA-1112, 3110-FA-1114	012345-1-016-0041-001	X	IFI	000	N/A	9/2/2016	000	T001						
D16	J887-1091-016-0042-001	Data Sheet	3110-FA-1114, 3140-FA-1121	012345-1-016-0042-001	X	IFI	000	N/A	9/2/2016	000	T001						
D16	J887-1091-016-0043-001	Data Sheet	3110-FA-1112, 3110-FA-1115	012345-1-016-0043-001	X	IFI	000	N/A	9/2/2016	000	T001						
D16	J887-1091-016-0044-001	Data Sheet	3110-FA-1115, 3140-FA-1122	012345-1-016-0044-001	X	IFI	000	N/A	9/2/2016	000	T001						
E02	J887-1091-020-0037-001	Cross Sect Dwg / Exploded	3110-FA-1111, 3110-FA-1113	012345-1-020-0037-001	X	IFI	000	N/A	9/2/2016	000	T001						
E02	J887-1091-020-0038-001	Cross Sect Dwg / Exploded	3140-FA-1116	012345-1-020-0038-001	X	IFI	000	N/A	9/2/2016	000	T001						
E02	J887-1091-020-0039-001	Cross Sect Dwg / Exploded	3110-FA-1111, 3110-FA-1113	012345-1-020-0039-001	X	IFI	000	N/A	9/2/2016	000	T001						
E02	J887-1091-020-0040-001	Cross Sect Dwg / Exploded	3110-FA-1116	012345-1-020-0040-001	X	IFI	000	N/A	9/2/2016	000	T001						
E02	J887-1091-020-0041-001	Cross Sect Dwg / Exploded	3110-FA-1112, 3110-FA-1114	012345-1-020-0041-001	X	IFI	000	N/A	9/2/2016	000	T001						
E02	J887-1091-020-0042-001	Cross Sect Dwg / Exploded	3110-FA-1114, 3140-FA-1121	012345-1-020-0042-001	X	IFI	000	N/A	9/2/2016	000	T001						
E02	J887-1091-020-0043-001	Cross Sect Dwg / Exploded	3110-FA-1112, 3110-FA-1115	012345-1-020-0043-001	X	IFI	000	N/A	9/2/2016	000	T001						
E02	J887-1091-020-0044-001	Cross Sect Dwg / Exploded	3110-FA-1115, 3140-FA-1122	012345-1-020-0044-001	X	IFI	000	N/A	9/2/2016	000	T001						
I04	J887-1091-104-0001-001	Inspection and Test Plan	3110-FA-1111, 3110-FA-1112	012345-1-104-0001-001	X	IFI	000	8/15/2016									
K05	J887-1091-105-0002-001	Operating and	3140-FA-1112, 3140-FA-1122	012345-1-105-0002-001	X	IFI	000	N/A	9/2/2016	000	T001						
K05	J887-1091-105-0003-001	Operating and	3110-FA-1114	012345-1-105-0003-001	X	IFI	000	N/A	9/2/2016	000	T001						
K05	J887-1091-105-0004-001	Operating and	3110-FA-1116	012345-1-105-0004-001	X	IFI	000	N/A	9/2/2016	000	T001						
K05	J887-1091-105-0005-001	Operating and	3110-FA-1115, 3140-FA-1116	012345-1-105-0005-001	X	IFI	000	N/A	9/2/2016	000	T001						
K05	J887-1091-105-0006-001	Operating and	3110-FA-1112, 3140-FA-1115	012345-1-105-0006-001	X	IFI	000	N/A	9/2/2016	000	T001						
K05	J887-1091-105-0007-001	Operating and	3110-FA-1111, 3110-FA-1113	012345-1-105-0007-001	X	IFI	000	N/A	9/2/2016	000	T001						
K05	J887-1091-105-0008-001	Operating and	3110-FA-1115, 3110-FA-1112	012345-1-105-0008-001	X	IFI	000	N/A	9/2/2016	000	T001						
L14	J887-1091-114-0001-001	Functional Test Reports	3110-FA-1111	012345-1-114-0001-001	X	IFI	000	8/15/2016									
L14	J887-1091-114-0002-001	Functional Test Reports	3110-FA-1112	012345-1-114-0002-001	X	IFI	000	8/15/2016									
L14	J887-1091-114-0003-001	Functional Test Reports	3110-FA-1113	012345-1-114-0003-001	X	IFI	000	8/15/2016									
L14	J887-1091-114-0004-001	Functional Test Reports	3110-FA-1114	012345-1-114-0004-001	X	IFI	000	8/15/2016									
L14	J887-1091-114-0005-001	Functional Test Reports	3110-FA-1115	012345-1-114-0005-001	X	IFI	000	8/15/2016									
L14	J887-1091-114-0006-001	Functional Test Reports	3110-FA-1116	012345-1-114-0006-001	X	IFI	000	8/15/2016									

Sheet1

**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.

