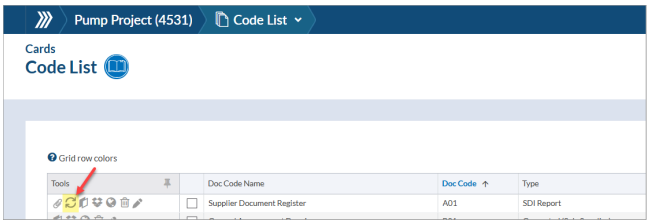
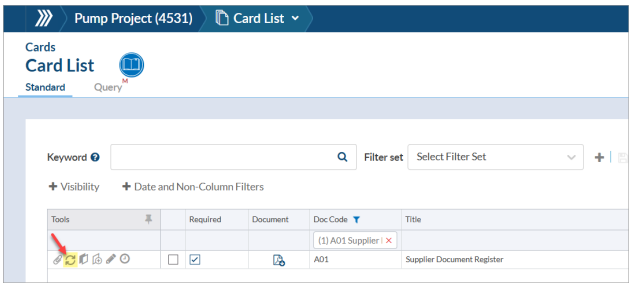
Regenerate SDI Reports

09/23/2026 12:27 pm MDT

Once the card is linked to the applicable SDI Report (discussed in this article), a regenerate icon will appear in the Tools column of the code list (for the SDI doc code), AND on the card list.



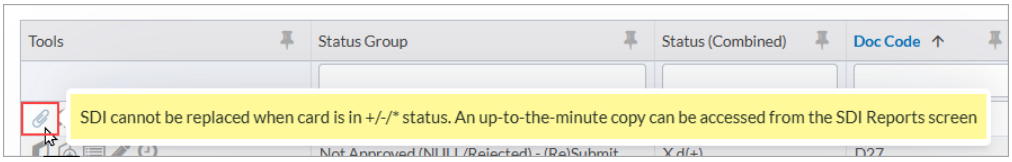


Note: Re-generating the SDI from the **Index Reports & Compilations** page does not replace the SDI report attached to a card.

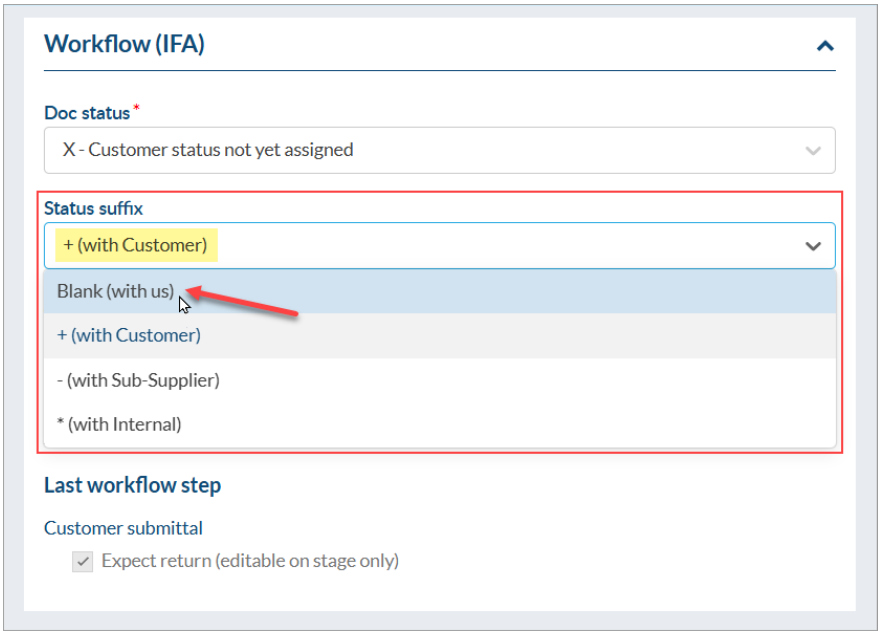
Regeneration Unavailable

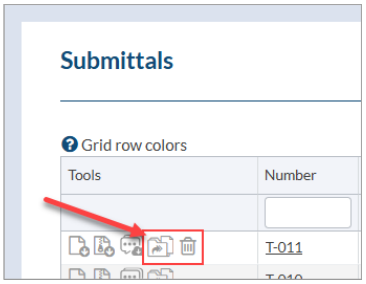
Submitted to Target

If the card is in an outbound workflow (i.e., it has been submitted to the customer), regeneration is NOT available. DocBoss ensures that the version stays the same until it has been returned.



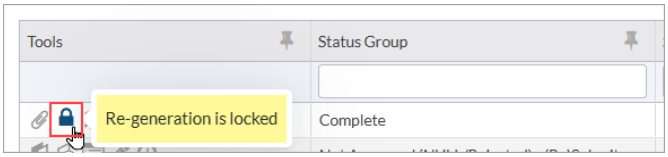
If there is a specific reason that the SDI Report needs be regenerated, the status of the card needs to be **changed manually** or use **void**/**reclaim** **options** available for the submittal the SDI Report was issued on.





Status = Complete

If the card receives a complete (approved) status, the card becomes locked and regeneration icon is NOT available. DocBoss ensures that the approved copy is the version that remains linked to the card (even if changes are made).



If an updated version of the SDI Report needs to be submitted to the customer, follow the steps outlined in this article to reset the status: How to re-submit documents that have been previously completed (approved).

Locked Cards

Submitting the SDI Report through DocBoss will lock all cards on a project. DocBoss will assume once the SDI Report has been submitted, the customer will be expecting all documents on the list. If a listed document becomes is no longer required/applicable, having the card locked will allow you to still display that entry in the SDI Report (if desired - see article: Add an SDI Report to your project).

For more details on card states, see this article: Card State

Regenerating SDI to include in a Compilation

If a full list of documents needs to be included in a compilation (but the report does not need to be submitted separately), first regenerate the SDI and THEN regenerate the compilation. This will ensure that an up-to-date version of the document list is included in the compilation.