

Create multiple SDI reports for one project using Worksheet parameter

09/16/2024 1:45 pm MDT

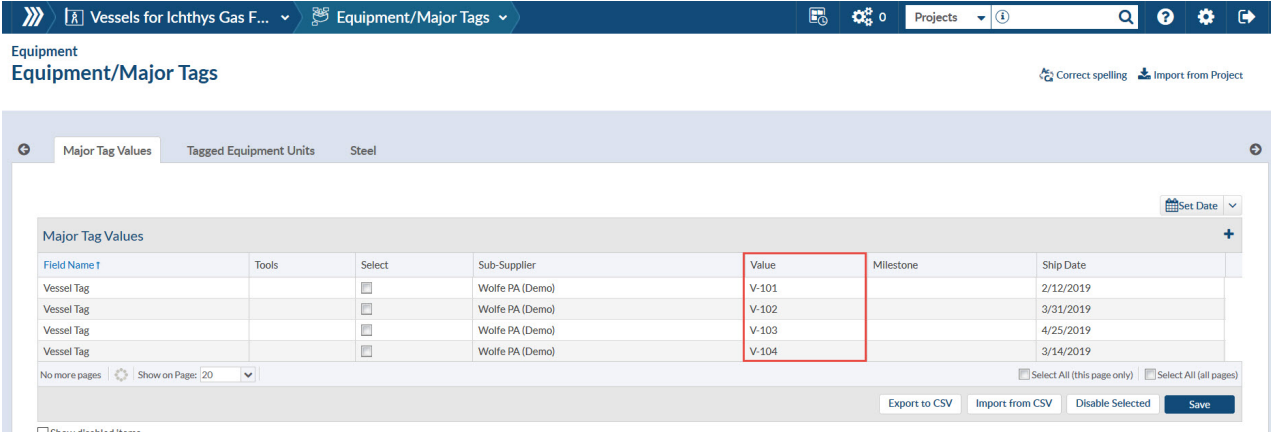
You may have been asked by your customer to submit a unique SDI report for each Tag, or each PO (if multiple PO's on same DocBoss project).

DocBoss doesn't support a full SDI based on a level. There are many questions about documents which apply to more than one SDI, but we allow you to create one SDI with multiple tabs. Each tab is a unique "LIST" value.

Note: If using a custom equipment field as the basis to create separate worksheets, for example <Start_DocumentsByIndex|Worksheet=CustomX_List>, the custom field must be created at an admin level. This parameter currently does not work on project created custom equipment fields (CustomXXXX fields).

Example:

Assume that you have 4 Major Tags: V-101, V-102, V-103, V-104. If you choose to create worksheets by Major Tags, you will get one tab for each Tag.



The screenshot shows the DocBoss interface for 'Equipment/Major Tags'. The main content area displays a table titled 'Major Tag Values' with the following data:

Field Name I	Tools	Select	Sub-Supplier	Value	Milestone	Ship Date
Vessel Tag		<input type="checkbox"/>	Wolfe PA (Demo)	V-101		2/12/2019
Vessel Tag		<input type="checkbox"/>	Wolfe PA (Demo)	V-102		3/31/2019
Vessel Tag		<input type="checkbox"/>	Wolfe PA (Demo)	V-103		4/25/2019
Vessel Tag		<input type="checkbox"/>	Wolfe PA (Demo)	V-104		3/14/2019

Below the table, there are controls for 'Show on Page: 20', 'Select All (this page only)', 'Select All (all pages)', 'Export to CSV', 'Import from CSV', 'Disable Selected', and a 'Save' button. A 'Set Date' dropdown is also visible in the top right corner of the table area.

BUT ALSO

If you have one document which is linked to 2 tags (e.g. V-101 and V-104), we create a TAB for "V-101, V-104". And on that tab we list all docs with that Major Tag List.

And, if you have an "order level" document, it will have a Major Tag List with all tags. Those will appear on the worksheet called "V-101, V-102, V-103, V-104".

Grid Rows Colors How to use auto-generated values for INPEX Doc # and Wolfe PA Doc # Add to Ad-Hoc-Queue Set Date Generate Request Bulk Doc Download Delete Manual Cards Save

Card List

INPEX Doc Code: - Select Code - Reference: - Select Reference - Level: - Select Level - Tagged Units: - Select Unit - Sub-Supplier: - Select Sub-Supplier - Clear Search

Stage: - Select Stage - INPEX Status: - Select Status - State: - Select State - Transmittal: - Select Transmittal - Internal Code: - Select Internal Code -

Location: - Select Location - Routing: - Select Routing -

Due to INPEX:
 Expected Return to Wolfe PA:
 Days since last request: Keyword:

Card List

Required	Doc Code	Title	Wolfe PA Doc #	Vessel Tag List	Level	Tools	Status (Combined)
<input checked="" type="checkbox"/>	L02	Valve List	J887-L02-0001-001	V-101, V-102, V-103, V-104	Order		NULL
<input checked="" type="checkbox"/>	IN01	Dimensional Drawings	J887-IN01-0002-001	V-101, V-102, V-103	Item/Model (TE)		X-
<input checked="" type="checkbox"/>	D03	Structural Detail Drawings	J887-D03-0001-001	V-101, V-102	Manual		NULL
<input checked="" type="checkbox"/>	D01	P&ID	J887-D01-0001-001	V-101	Vessel Tag		3+
<input checked="" type="checkbox"/>	D01	P&ID	J887-D01-0003-001	V-102	Vessel Tag		NULL
<input checked="" type="checkbox"/>	D01	P&ID	J887-D01-0004-001	V-103	Vessel Tag		NULL
<input checked="" type="checkbox"/>	D01	P&ID	J887-D01-0005-001	V-104	Vessel Tag		NULL
<input checked="" type="checkbox"/>	C01	Calculations	J887-C01-0002-002	V-101, V-104	Manual		NULL

Result in a SDI report


Doc Code	Client Doc No.	Supplier Document Title	Tag List	Supplier Document No:	Current status	Current	Current Rev	Due Date
D01	K090-0090-D01-0001-001	P&ID	V-101	J887-D01-0001-001	1	IFA	0	30/10/2019
IN03	K090-0090-IN03-0001-001	Catalog	V-101	J887-IN03-0001-001	1	IFA	0	30/10/2019
IN03	K090-0090-IN03-0006-001	Catalog	V-101	J887-IN03-0006-001	1	IFA	0	30/10/2019
IN05	K090-0090-IN05-0001-001	Pressure Reports	V-101	J887-IN05-0001-001	1	IFA	0	30/10/2019
IN05	K090-0090-IN05-0006-001	Pressure Reports	V-101	J887-IN05-0006-001	1	IFA	0	30/10/2019
Q01	K090-0090-Q01-0001-001	MTR - Pkg	V-101	J887-Q01-0001-001	1	IFA	0	30/10/2019
Q02	K090-0090-Q02-0002-001	Procedures	V-101	J887-Q02-0002-001	1	IFA	0	30/10/2019
Q05	K090-0090-Q05-0001-001	NDE - Hydro	V-101	J887-Q05-0001-001	1	IFA	0	30/10/2019
Q05	K090-0090-Q05-0005-001	NDE - Visual	V-101	J887-Q05-0005-001	1	IFA	0	30/10/2019
Q05	K090-0090-Q05-0009-001	NDE - Mag	V-101	J887-Q05-0009-001	1	IFA	0	30/10/2019
Q06	K090-0090-Q06-0002-001	NDE Procedures	V-101	J887-Q06-0002-001	1	IFA	0	30/10/2019
S02	K090-0090-S02-0001-001	Anchor Profile Report	V-101	J887-S02-0001-001	1	IFA	0	30/10/2019
Z01	K090-0090-Z01-0001-001	DataBook - Per Vessel	V-101	J887-Z01-0001-001	1	IFA	0	30/10/2019

Worksheet tabs: V-101, V-102, V-103, V-104, V-101, V-102, V-101, V-103, V-101, V-104, V-101, V-102, V-103, V-101, V-102, V-103, V-101, V-102, V-103, V-104

So - if you have all docs ONLY linked to one tag, you'll get one tab for each tag, and if you have docs linked to more than one tag they will be on the tab for that "TagList"

Variables

Multiple SDI report option it is enabled by "Worksheet" parameter on the start variable and <WorksheetFilterValue> variable in the sheet name.

1	A	B	C	D	E	F	G
2	SUPPLIER DOCUMENT REGISTER						
3							
4			Client : <Customer_Name>				
5			P.O. Number : <PO_Number>				
6			P.O. Date: <Order_Date>				
7			Project : <Project_Name>				
8			<Supplier_Short_Name> Ref: <Order>				
9							
10							
11							
12	Doc code	Client Doc No.	Supplier Document Title	Tag List	Supplier Document No:	Current status	Current Stage
13	<Start_DocumentsByIndex Worksheet=MajorTag1_List>						
14	<DocumentsByIndex>	<DocumentsByIndex.Customer_DocCodeName_Title>	<DocumentsByIndex.DocCodeName_Title>	<DocumentsByIndex.EqList>	<DocumentsByIndex.Supplier_Doc_Number Au>	<DocumentsByIndex>	<DocumentsByIndex>
15							
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If using Major Tag values, variables is: <Start_DocumentsByIndex|Worksheet=MajorTagX_List> (X is ID of MajorTag Field)

IMPORTANT: This is a SINGLE SDI report. You'd have to split worksheets to separate tabs to make multiple SDI's. And decide what to do with multi-SDI docs.