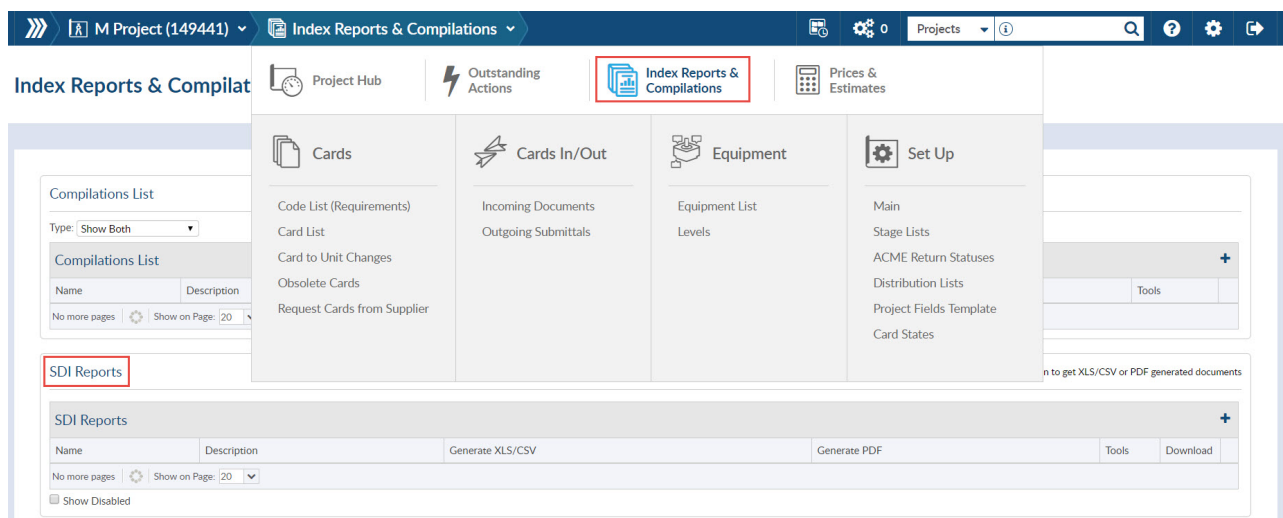# Add an SDI Report to your project
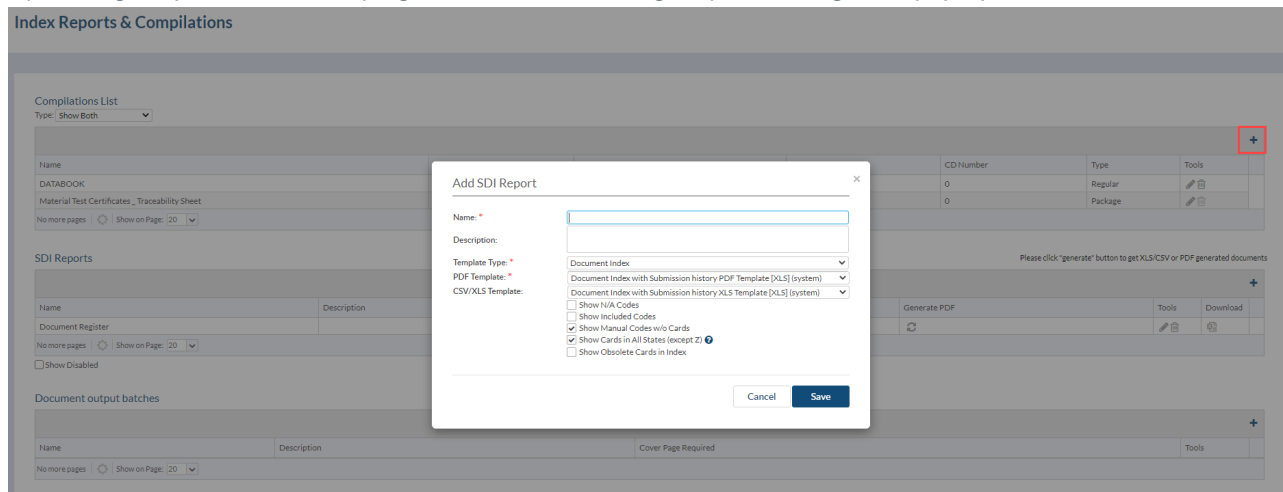
09/16/2024 1:45 pm MDT

An SDI Report is a listing that details the full scope of documentation for a specific project. It could also be referred to as a Document Register, or Document Index. Some customers have this as part of their documentation requirements. They may even issue a specific template of what/how the information is to be provided. DocBoss has the ability to auto-populate this data for you. With a few simple steps you can set up your requirements and the report can be generated at any point throughout the project.

Add an SDI Report to a Project

Main > Index Reports & Compilations, scroll to SDI Reports

By clicking the plus (+) in the top right-hand corner of the grid, you will be given a pop-up.

Name - Enter the name of the report (i.e. "Supplier Document Index"). This name often reflects the name of the report your customer expects to receive.
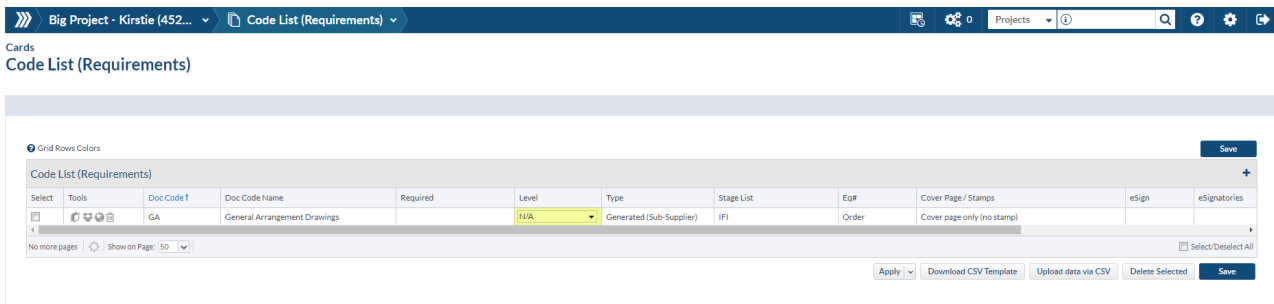
Description - Any additional description you want to add

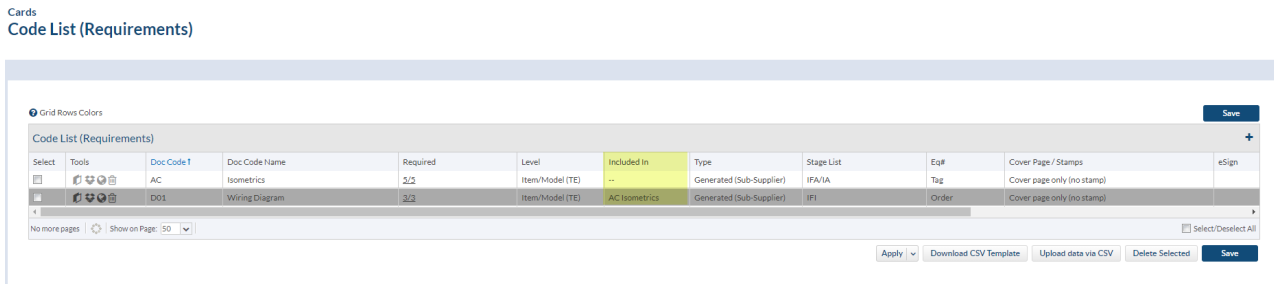Template Type - Select Document Index

PDF Template & CSV/XLS Templates - Select the appropriate report. Most often – the custom templates will appear in the CSV/XLS drop-downs – so be sure to check there! The PDF selection is required BUT you do not have to generate one. Typically for an SDI Report, you will be using the XLS output.

Additional Options: If your customer has asked for an entry in the document index for every requested code (regardless of the applicability), you can set the options when adding the report to the project. See explanation and screenshot of code list below for information
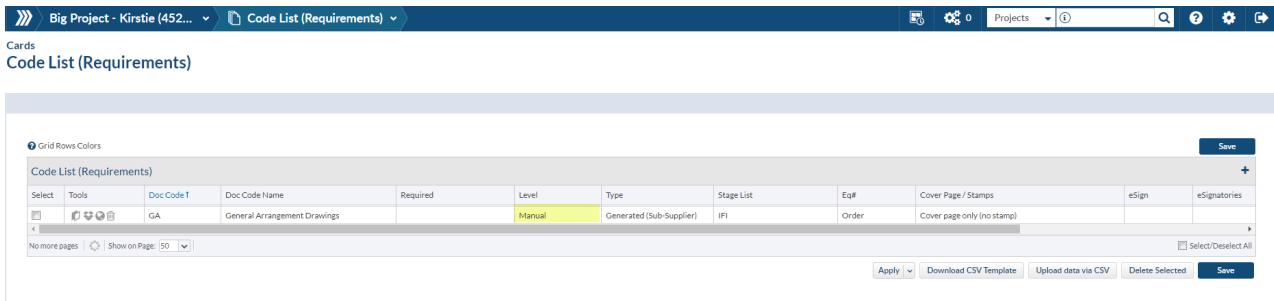
- ***Show N/A Codes -*** To show codes that the customer requested but have been marked as Not Applicable (on the Code List) Enable *Show N/A Codes.* This will add a line to the SDI Report for every code marked N/A in the Code List

- ***Show Included Codes -*** To show doc codes that were marked to be included in another code (on the Code List) Enable *Show Included Codes.* This will add a line to the index for codes which have a value in the "Included In" column in the Code List

- ***Show Manual Codes w/o Cards -*** To show codes with the level set to "manual" but you have not added any cards to the system, enable *Show Manual Codes w/o cards.* This will show the code even if there are no cards set to the code yet.

- ***Show Cards in All States (except Z) -*** To show every card which was previously reported to exist, but are no longer valid enable *Show Cards in All States (except Z).* This will show all cards except those which are selected as not required on the card list.

- ***Show Obsolete Cards in Index -*** To Show cards that were once submitted but now the reference has changed Enable- *Show Obsolete Cards in Index.* Click here for details on obsolete cards. *Note that there is no sorting in the

SDI for the Obsolete Cards. They will be added to the end of the report.*

Note: For cards with "No Individual Submission" as the Stage List, Due dates will not be shown on the SDI unless they have been manually set on each card. For information on manually setting dates on cards, see our article here.

Generate the SDI Report

After the report has been created – you can refresh its contents at any time. In the grid, there are two columns, Generate XLS/CSV and Generate PDF. Click the icon in the applicable column, and the report will generate.

You can download the report by clicking one of the icons under the "download" column. Click the Excel icon to download in Excel. Click the PDF link to download the PDF template.

NOTE: Each icon is linked to a DIFFERENT template, not just a PDF version of the XL report.

To submit/manage an SDI Report as a document on the project, you must link your SDI Report to a Document Card. Click here to see how.