Add an SDI Report to a Project

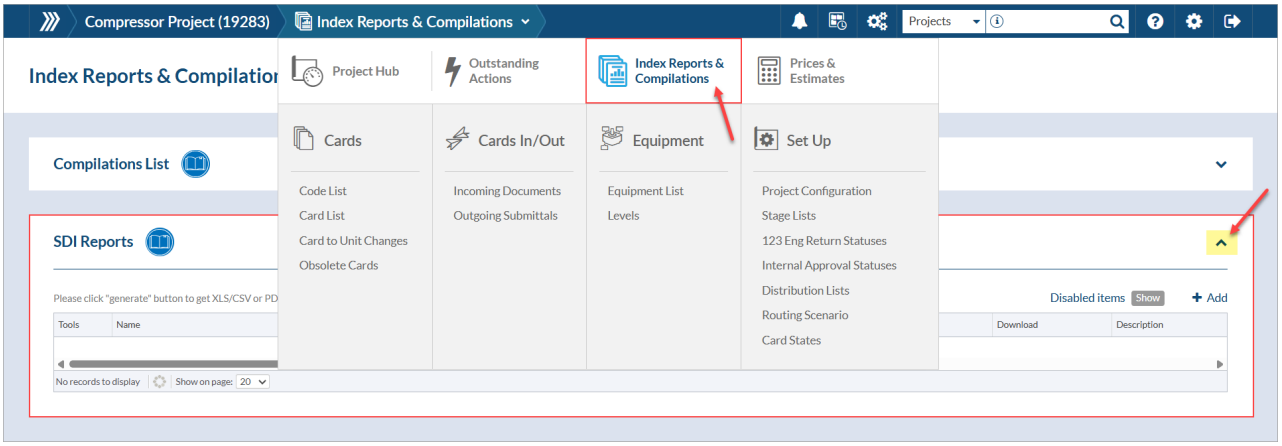
09/28/2026 9:54 am MDT

An supplier document index (SDI) report (also commonly referred to as a document register, list or schedule) details the full scope of documentation for a specific project. Some customers require this type of deliverable, and may even supply a unique template of what/how the information is to be provided.

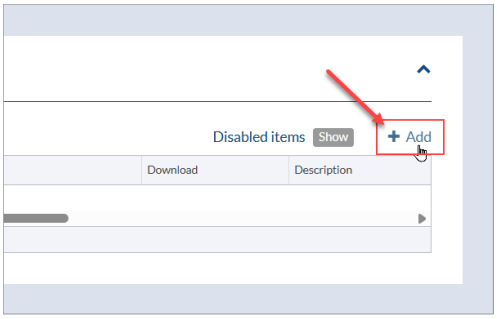
With a few simple steps, DocBoss can generate this report for you using the data already recorded on the project.

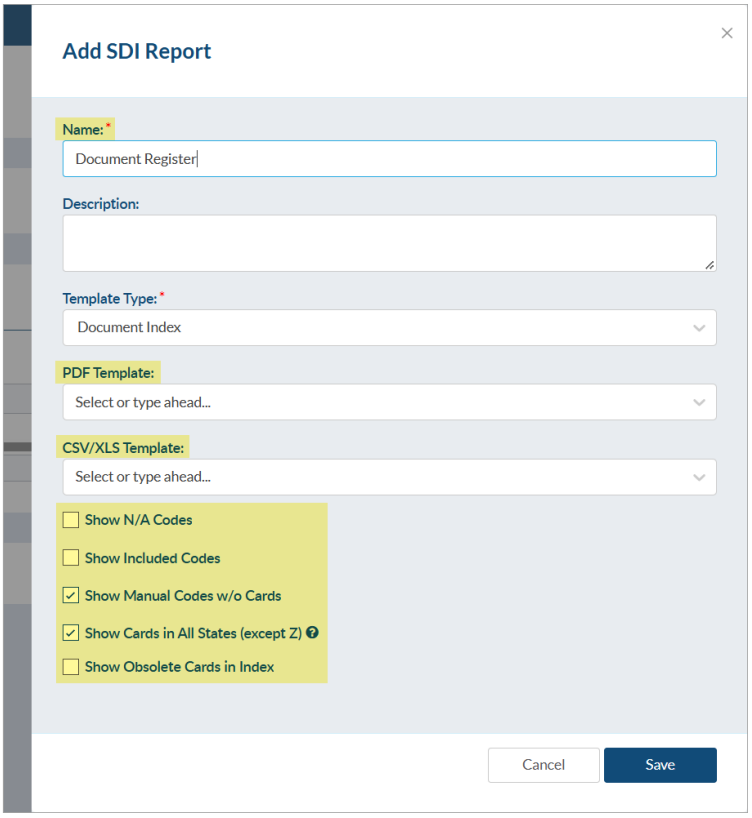
Add an SDI Report

To begin, navigate to **Project Menu > Index Reports & Compilations** and expand the "SDI Reports" section.



To add a new SDI to the project, click the "+ Add" button (top right). Give the SDI report a name, select the template for each output (PDF and/or CSV/XLS), and configure the additional options as needed:





Name - Enter the name of the report (e.g., "Document Register"). This name generally reflects the name your customer expects to receive.

Description - Any additional details about the report (*optional*)

Template Type - Set as "Document Index" (*pre-selected*)

PDF Template & CSV/XLS Template - Select the appropriate template (either the system default, or a unique template uploaded to the system (see article: Upload Templates into DocBoss)) for the output your customer is expecting to receive. You only need to select a template for the output you need to generate.

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 these options when adding the report to the project. See explanations for each option below:

- ***Show N/A Codes*** - Show doc codes that the customer requested but have been marked as Not Applicable on the Code List.
- ***Show Included Codes*** - Show doc codes that were marked to be included in another code on the Code List.
- ***Show Manual Codes w/o Cards*** - Show doc codes with the level set to "Manual" but do not have any cards to the system. This will add a line to the report for the code so that it's visible as a requirement (despite there being no cards).
- ***Show Cards in All States (except Z)*** - Show every card which was previously reported to the customer, but are no longer valid (e.g., cards which are voided, cancelled, etc. (see article: Card State)). Cards which have never been required (i.e., cards in state "Z") will still remain excluded from the report. If left unchecked, only active cards (i.e., cards in state "A") will be included in the report.
- ***Show Obsolete Cards in Index*** - Show cards which were previously reported to the customer but are now

considered obsolete (see article for details: Obsolete Cards and How to Manage Them).

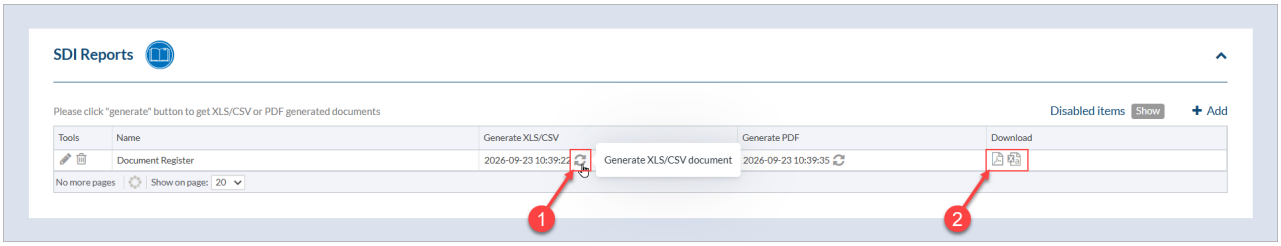
Note: For cards with "No Individual Submission" as the Stage List, due dates will not be shown on the SDI unless they have been manually set on each card. For information on manually setting dates on cards, see this article: Due Date & Expected Date.

Generate the SDI Report

After the report has been created, you can regenerate its data at any time. In the grid, there are two columns for each output.

(1) To generate, click the icon under the column which provides the desired output (PDF or XLS/CSV)

(2) To download, click the icon that reflects the desired output (PDF or XLS/CSV)



If you do not see a regeneration icon available for the desired output, ensure that a template has been selected for this output type by clicking the pencil icon under "Tools".

IMPORTANT: To manage/submit an SDI Report as a document on the project, the report must be linked to a card. See this article for details: Linking an SDI Report to a Document Card.