Linking an SDI Report to a Document Card

09/16/2024 1:45 pm MDT

If you want the ability to submit and manage an Index Report in DocBoss you must link the SDI Report to a Document Card.

Step 1 - Ensure Doc Code is set to Type = SDI Report

- Navigate to Code List (Requirements)
- On the Doc Code for the applicable SDI Report ensure Type selected is SDI Report

Cards

Code List (Requirements)

Docur	ment Requirements					
Select	Tools	Doc Code †	Doc Code Name	Level	Туре	Stage List
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(free)	Ø₩0±	CD	Material Test Certificates	Tag (TE)	Generated (Sub-Supplier)	IFI
	Ø\$0®	DB	NDT Records	Tag (TE)	Generated (Sub-Supplier)	IFI
	000	ITP	Inspection Test Plan	Order	Generated (Sub-Supplier)	IFI
		MB	Manufacturer Data Book	Order	Compilation	IFI

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Step 2 - Attach Card to SDI Report

• Under the Tools column (of the applicable card), click the attach icon

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				Add Cover Page / Stamps Co	over page only (no stamp)	×	Ø	Attach			

You can choose to attach EITHER the PDF OR the XLS version. NOTE: Each icon is linked to a DIFFERENT template, not just a PDF version of the XLS report. The options available in this grid will be based on the set up of the project. Click here to setup new SDI Report.

If there is more than one Card created for the SDI Report (i.e. Item/Model was selected), the SDI Reports can be attached to each applicable Card in Card List.

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More options under Tools column:

How to Re-generate the SDI Report