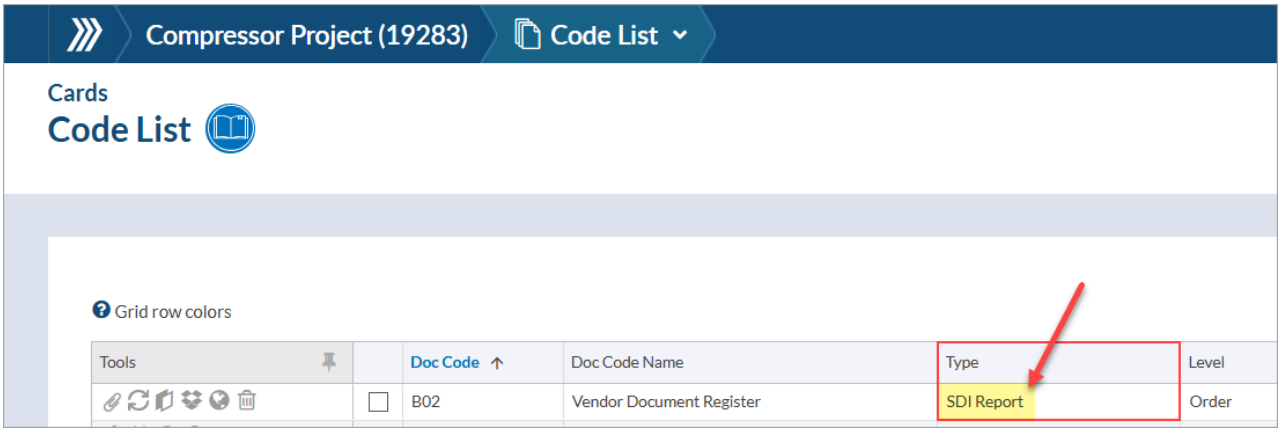
Linking an SDI Report to a Card

09/23/2026 1:01 pm MDT

In order to manage/submit SDI reports in DocBoss, the report must be linked to a card. To do this, follow the steps below:

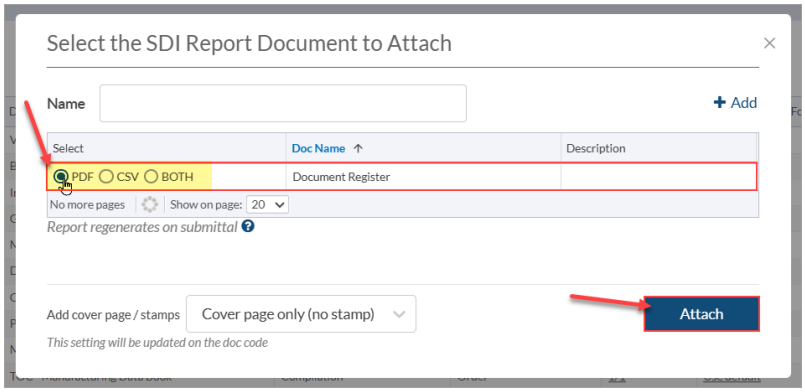
Step 1 - Ensure the doc code "Type" is set to "SDI Report"

- Navigate to **Project Menu > Cards > Code List**
- For the applicable doc code, set the "Type" to "SDI Report"

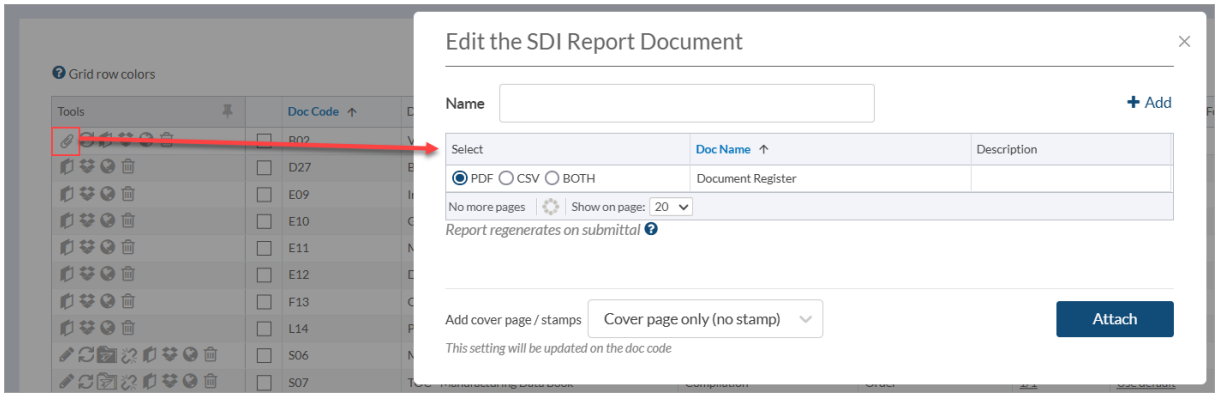


Step 2 - Attach the SDI Report to the doc code

- Upon changing the "Type" to "SDI Report", a pop-up will appear where you will select the output type of the report (PDF, CSV, or both). Once selected, click "Attach"



- If the linked report or output type need to be changed, click the paperclip icon under "Tools"



Note that each output may use a different template (as defined in the SDI report settings - see article: Add an

SDI Report to your project).

Multiple Reports

If there is more than one card created for the requirement (e.g., doc code level was set to "Item/Model (TE)"), the applicable report can be attached to each card from the card list.

