

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

Grid Rows Colors

Code List (Requirements)

Select	Tools	Doc Code†	Doc Code Name	Level	Type	Stage List
<input type="checkbox"/>		AA	Document Schedule	Order	SDI Report	IFI
<input type="checkbox"/>		AC	General Arrangement Drawings	Item/Model (TE)	Generated (Sub-Supplier)	IFI
<input type="checkbox"/>		CD	Material Test Certificates	Tag (TE)	Generated (Sub-Supplier)	IFI
<input type="checkbox"/>		DB	NDT Records	Tag (TE)	Generated (Sub-Supplier)	IFI
<input type="checkbox"/>		ITP	Inspection Test Plan	Order	Generated (Sub-Supplier)	IFI
<input type="checkbox"/>		MB	Manufacturer Data Book	Order	Compilation	IFI

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Apply | Download

Step 2 - Attach Card to SDI Report

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

Grid Rows Colors

Code List (Requirements)

Select	Tools	Doc Code†	Doc Code Name	Level	Type	Stage List	Cover Page / Stamps	Support Cover Page
<input type="checkbox"/>		AA	Document Schedule	Order	SDI Report	IFI	Cover page only (no stamp)	Use Project Default
<input type="checkbox"/>		AC	General Arrangement Drawings	Item/Model (TE)	Generated (Sub-Supplier)	IFI	Cover page only (no stamp)	Use Project Default
<input type="checkbox"/>		CD	Material Test Certificates	Tag (TE)	Generated (Sub-Supplier)	IFI	Cover page only (no stamp)	Use Project Default
<input type="checkbox"/>		DB	NDT Records	Tag (TE)	Generated (Sub-Supplier)	IFI	Cover page only (no stamp)	Use Project Default
<input type="checkbox"/>		ITP	Inspection Test Plan	Order	Generated (Sub-Supplier)	IFI	Cover page only (no stamp)	Use Project Default
<input type="checkbox"/>		MB	Manufacturer Data Book	Order	Compilation	IFI	Cover page only (no stamp)	Use Project Default

Select the SDI Report Document to Attach

Name: Search + Add

Select	Doc Name†	Description
<input checked="" type="radio"/>	PDF	Supplier Document Index
<input type="radio"/>	CSV	
<input type="radio"/>	BOTH	

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Add Cover Page / Stamps: Cover page only (no stamp)

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.

The screenshot displays the 'Card List' interface with a table of cards and a modal for selecting an SDI report document to attach. Red callouts 1, 2, and 3 highlight the 'Tools' column, the 'PDF' radio button, and the 'Attach' button respectively.

Required	Tools	Doc Code†	Card Name(Auto)	Title	Level	Wolfe PA Doc #	Status (Combined)	Support Status	Submission #
<input checked="" type="checkbox"/>		AA	AA_LevelProbe-10Inch	Document Schedule	Item/Model (TE)	4529 DS-AA-0003-001	NULL	NULL	0
<input checked="" type="checkbox"/>		AA	AA_LevelProbe-09Inch	Document Schedule	Item/Model (TE)	4529 DS-AA-0004-001	NULL	NULL	0
<input checked="" type="checkbox"/>		AA	AA_LevelProbe-08Inch	Document Schedule	Item/Model (TE)	4529 DS-AA-0005-001	NULL	NULL	0
<input checked="" type="checkbox"/>		AA					NULL	NULL	0
<input checked="" type="checkbox"/>		AA					NULL	NULL	0
<input checked="" type="checkbox"/>		AC					NULL	NULL	0
<input checked="" type="checkbox"/>		AC					NULL	NULL	0
<input checked="" type="checkbox"/>		AC					NULL	NULL	0
<input checked="" type="checkbox"/>		AC					NULL	NULL	0
<input checked="" type="checkbox"/>		AC					X+	X	1
<input checked="" type="checkbox"/>		AC					NULL	NULL	0

Select the SDI Report Document to Attach

Name: Search + Add

Select	Doc Name†	Description
<input checked="" type="radio"/> PDF <input type="radio"/> CSV <input type="radio"/> BOTH	Supplier Document Index	

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Add Cover Page / Stamps Cover page only (no stamp) Attach

More options under Tools column:

[How to Re-generate the SDI Report](#)