Advanced Library Queries (Pattern Search) for MTRs

10/01/2025 4:56 pm MDT

For companies with large collections of material test reports (MTRs) stored in the library, the easiest way to automatically attach these to a project's cards is through a query with pattern search.

Setup

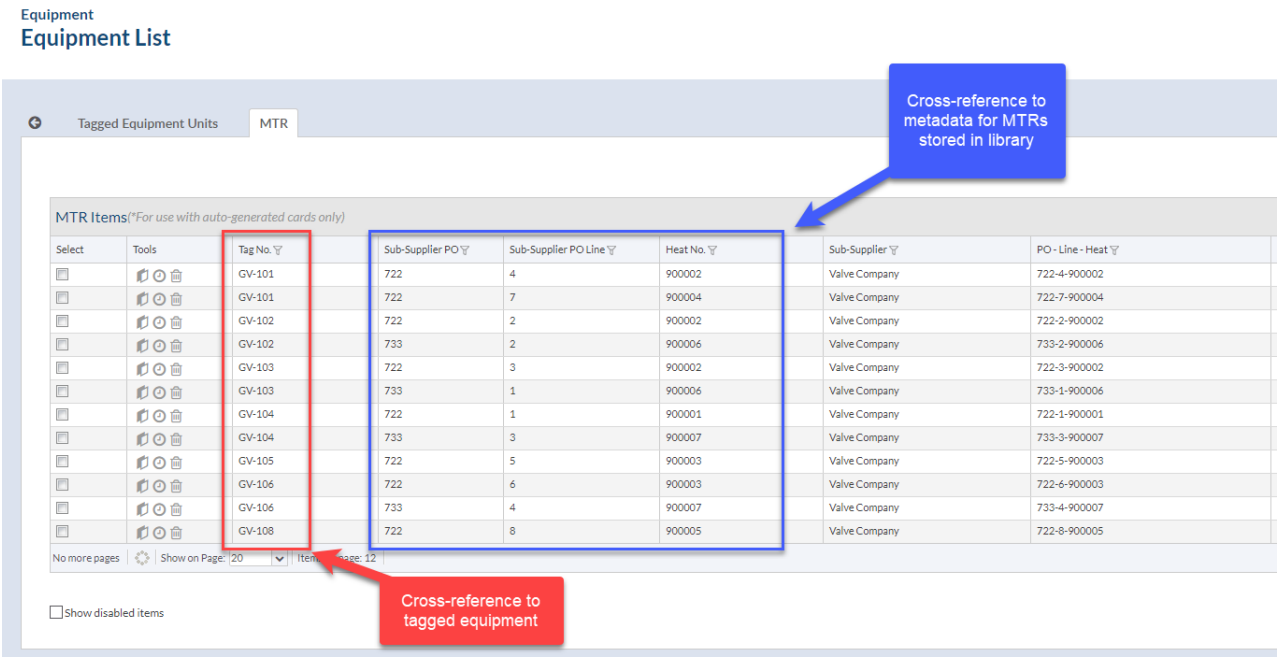
Before following these steps, the following will need to be in place:

- Add Custom Library Fields
- Storing Material Test Reports (MTRs) in the Library

Steps

Add required information to equipment list

A common situation where pattern searching is useful is with MTR documents. For this, the information for the MTRs should be added under an additional unit type within the project, as in the example below:



Add combination field

If not already included in the project template used, add a combination field with the references each library document will contain. For example, if the library has custom fields for **Sub-supplier PO**, **Sub-supplier PO line**, and **Heat number** which are completed for material test report (MTR) documents, the combination field should contain those if the user wants to group the documents by them.

1. From the **Code List (Requirements)** screen on a project, set the applicable doc code's level as the combination field.

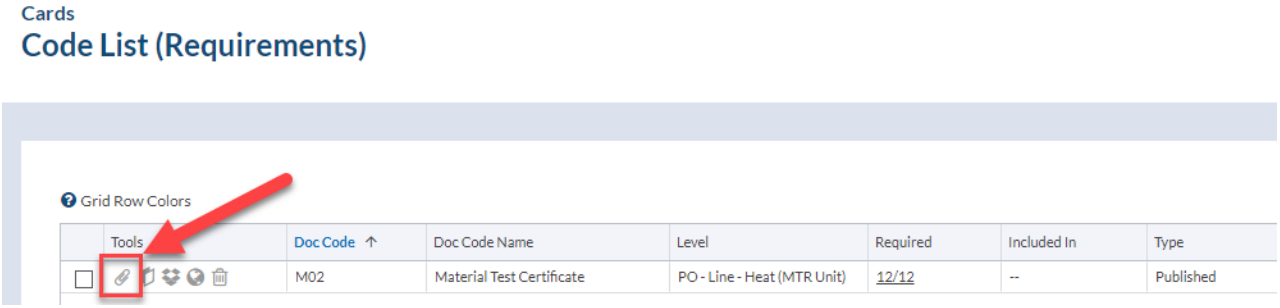
2. Select **Save**.

Set doc code type as published

1. From the **Code List (Requirements)** screen on a project, set the applicable doc code's **Type** to **Published**.

2. Select **Save**.

3. The **Attach** tool (paperclip) will become available under the **Tools** for this doc code.



Run query with pattern search

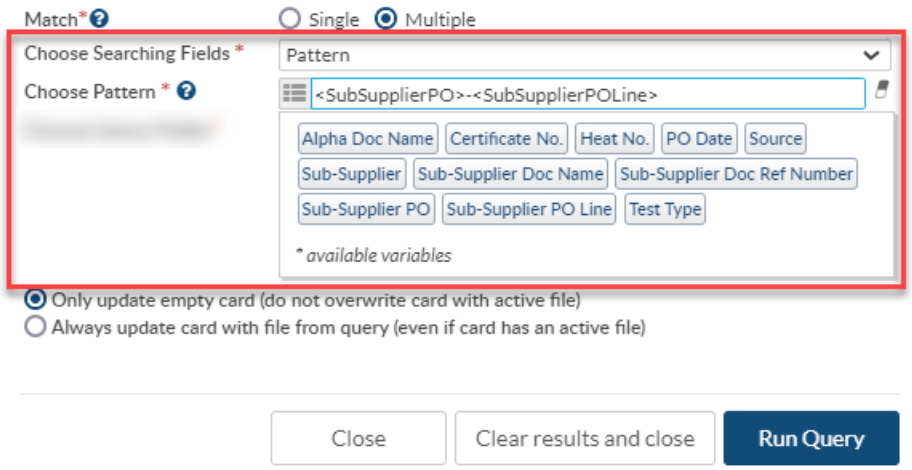
1. Select the **Attach** tool (under the **Tools** column) for the applicable doc code.

2. Select **Choose searching fields** > **Pattern**.

3. Fill out the pattern to match the combination field used as the level for the doc code. *(Note: this step is important as this is what tells DocBoss to search for the library card with the pattern that matches the card's reference.)*

4. Select the folder to search.

5. Select **Run query**.



The dialog will close and the query will run in the background. Once the query is complete, the **Attach** tool will turn red and an asterisk will appear next to it. This indicates that the results of the query are ready to view by selecting the icon. A status update and report showing the results of the assignment are available from the popup.

Additional options

Wildcard search

An asterisk (*) can be added to allow matching to any characters at the start or end of the pattern.

Multiple values per cell

If comparing with values separated by a comma (ex. 123A,546B in one library field), add the following parameter to the applicable variable(s) in the search pattern: **|allowmultiplevalues**

For example: **<Heat Number|allowmultiplevalues>**