# Advanced Library Queries (Pattern Search) for MTRs

09/16/2024 1:57 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:

Equ	ipn	nent	
Eq	ui	pment	List

						stored i	n library
MTR Ite	e <b>ms</b> (*For use with a	auto-generated cards on	ly)				
Select	Tools	Tag No. ∀	Sub-Supplier PO 🗑	Sub-Supplier PO Line $orall$	Heat No. 🗑	Sub-Supplier 🗑	PO - Line - Heat 🍸
	r 🖸 🖸 🖻	GV-101	722	4	900002	Valve Company	722-4-900002
	10 🗇 🛍	GV-101	722	7	900004	Valve Company	722-7-900004
	10 🖻	GV-102	722	2	900002	Valve Company	722-2-900002
	r 🖸 🖸 🖻	GV-102	733	2	900006	Valve Company	733-2-900006
	1 🗘 🗇 🛍	GV-103	722	3	900002	Valve Company	722-3-900002
	10 🖻	GV-103	733	1	900006	Valve Company	733-1-900006
	r 🖸 🖸 🖻	GV-104	722	1	900001	Valve Company	722-1-900001
	r 🖸 🗹 🖻	GV-104	733	3	900007	Valve Company	733-3-900007
	10 🖻	GV-105	722	5	900003	Valve Company	722-5-900003
	r 🖸 🗹 🖻	GV-106	722	6	900003	Valve Company	722-6-900003
	r 🕐 🗇 🛍	GV-106	733	4	900007	Valve Company	733-4-900007
	10 🖻	GV-108	722	8	900005	Valve Company	722-8-900005
No more pa	iges 🛛 🔅 Show on P	age: 20 🗸 Item	hage: 12			-	

# 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

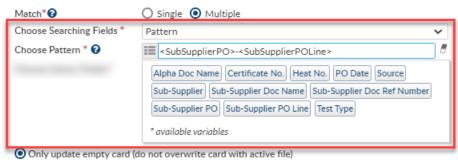
- 1. From the Code List (Requirements) screen on a project, set the applicable doc code's Type to Published.
- 2. Select Save.
- 3. The Attach tool (paperclip) will become available under the Tools for this doc code.

#### Cards Code List (Requirements)

Grid Row Colors						
Tools	Doc Code ↑	Doc Code Name	Level	Required	Included In	Туре
□ 0 1 😌 🖓 🖻	M02	Material Test Certificate	PO - Line - Heat (MTR Unit)	<u>12/12</u>	-	Published

### 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.



O Always update card with file from query (even if card has an active file)

Close	Clear results and close	Run Query
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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>