

# 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:

Equipment  
Equipment List

Tagged Equipment Units MTR

Cross-reference to metadata for MTRs stored in library

Cross-reference to tagged equipment

Select	Tools	Tag No. ▾	Sub-Supplier PO ▾	Sub-Supplier PO Line ▾	Heat No. ▾	Sub-Supplier ▾	PO - Line - Heat ▾
<input type="checkbox"/>		GV-101	722	4	900002	Valve Company	722-4-900002
<input type="checkbox"/>		GV-101	722	7	900004	Valve Company	722-7-900004
<input type="checkbox"/>		GV-102	722	2	900002	Valve Company	722-2-900002
<input type="checkbox"/>		GV-102	733	2	900006	Valve Company	733-2-900006
<input type="checkbox"/>		GV-103	722	3	900002	Valve Company	722-3-900002
<input type="checkbox"/>		GV-103	733	1	900006	Valve Company	733-1-900006
<input type="checkbox"/>		GV-104	722	1	900001	Valve Company	722-1-900001
<input type="checkbox"/>		GV-104	733	3	900007	Valve Company	733-3-900007
<input type="checkbox"/>		GV-105	722	5	900003	Valve Company	722-5-900003
<input type="checkbox"/>		GV-106	722	6	900003	Valve Company	722-6-900003
<input type="checkbox"/>		GV-106	733	4	900007	Valve Company	733-4-900007
<input type="checkbox"/>		GV-108	722	8	900005	Valve Company	722-8-900005

No more pages Show on Page: 20 Items per page: 12

Show disabled items

### 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	Type
<input type="checkbox"/>			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**.

Match\*   Single  Multiple

Choose Searching Fields \*

Choose Pattern \* 

\* available variables

Only update empty card (do not overwrite card with active file)  
 Always update card with file from query (even if card has an active file)

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>

---