

Store Material Test Reports (MTRs) in the Library

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Material Test Reports (MTRs) can be stored in the DocBoss library for use on individual projects.

The benefits of this include:

- Separate workflow for users managing MTRs and users managing projects
- Central repository and master source of your organization's MTR records
- No need for document controllers to upload or assign MTRs individually to cards - this is done automatically through a query

This process works best when integrated with [custom library fields](#) so that metadata specific to MTRs (heat number, certificate number, etc.) can be stored with the files and used in queries to automatically attach MTRs to projects.

Steps

As MTRs are received from suppliers, the user(s) responsible for managing MTRs should log in to DocBoss and complete the following steps:

1. From the **System menu**, select **Library > Manage library**.
2. Drag and drop the MTR files into the **Inbound documents** area, or select **Choose files from disk** to choose files for upload.

To process the uploaded files individually,

1. From the **Unprocessed files** grid, select the **Add (+)** icon under **Tools** to open the assign form.
2. Fill out the required fields and any applicable custom fields.
3. Select **Save**.

To process files in bulk,

1. Select **Assign files via CSV** (located above the **Unprocessed files** grid).
2. On the **Import from CSV** popup, select **Download CSV template**.
3. Open the downloaded file in Excel and fill out the information for each file. *Note: only fields marked with an asterisk (*) are required.*
4. Save and close the completed template.
5. In DocBoss, on the **Import from CSV** popup, drag and drop the template into the upload area or select **Choose files from disk**.
6. Select **Save**.

Note: Multiple values can be added to a single field in the upload file. If added, these should be comma-separated.

DocBoss will process the files in the background. A banner will appear indicating the results of the processing.

If the user(s) responsible for managing MTRs are different from the doc controllers on specific projects, then from here the work of these users is complete. The MTRs are now available to be [attached to projects](#).
