Using the Pattern Picker

Many KAStrack settings use a *pattern*: a short line of text that pulls in information from your fields. A pattern can name an entry, build a filename, or fill in the subject of an alert. The Pattern Picker helps you build a pattern by letting you choose fields from a list, so you do not have to type field names from memory.

How to Use the Pattern Picker

1. Click into a field that supports a pattern.
2. Type the **#** key. A list of the fields available for that pattern appears.
3. Click the field you want. It is added to the pattern with a # before and after its name, for example `#City#`.
4. Type any text you want between fields, such as a dash, a colon, or a space.
5. Repeat for each field you want to include, then save.

For example, a pattern of `#City#, #State#` displays as the city and state from each entry, separated by a comma.

How to Spot a Pattern Field

Most pattern fields show the label **Press # to use available fields** beside the field name, with a green **?** icon. Click the **?** icon to see an example pattern.

A few pages explain the same step in a note instead of a label:

- **Kanban Properties > Entry Formatting Views:** a note explains that any time you pick a Field Pattern entry, you can press # to use available fields.
- **People > Settings > Module Settings > Edit Attachment Naming Settings:** the available fields are listed below the Template box.
- **Communications > Settings > Alert Email Templates > Edit:** the Subject field has no label.

The Pattern Picker opens when you type # in each of these fields.

Where the Pattern Picker Is Available

Module	Where to Find It
Forms and Database: Fields	Calculated Field (Excel Formula); Copy Previous Entry Field (Reference Pattern); Attach DB/Form Entry(s) Field (Pattern for embedded entries); Database/Form Reference Field (Reference Pattern)
Forms and Database: Properties	Form Properties > Advanced Settings: Default pattern for entries
Forms and Database: Rules	Send an Alert (Subject, Message); On Approval, Send to Communications (Subject, Message); Save Draft and Assign (Subject, Message, Message to be displayed after saving); Create an Action Group From Template (Title); Use An Alternate Filename For Entry PDF (Filename Pattern); Change the Value of Fields (Set to, Prepend, Append)
Attendance	Attendance Log Properties: Short Pattern for Signed In Column; Pattern for when signing out/accounting for self; Pattern for the accounted for list
Inventory	Inventory Properties: Title Pattern; Unique Item Pattern; Inventory Item Pattern
Kanban	Kanban Properties: Pattern for Task Name in Activity Log; Kanban Properties > Entry Formatting Views: Field Pattern
People	Settings > Module Settings > Edit Attachment Naming Settings (Template)
Communications	Settings > Alert Email Templates > Edit (Subject)

The fields you can choose from depend on the form, database, or module you are working in.

Related Resources

- Regular Expression (regex) Resources

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