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DOCU12218	1

Export (User Guide)

1. Background

This article introduces you to the advanced capabilities of exporting item lists, properties and files from Highstage.

Here you will learn:

- How to take advantage of the available settings for exporting items, properties and files.
- How the selection behavior allows for you to select specific items and files for export.
- What is included in an export, and how those files can be accessed.

2. Introduction

Using the *Export* feature allows you to export the structure, data, and files from items into folders, ready for external use outside of Highstage.

You can use *Export* from any item in Highstage by navigating to **Options** > **Advanced** > **Export (export documentation)**:
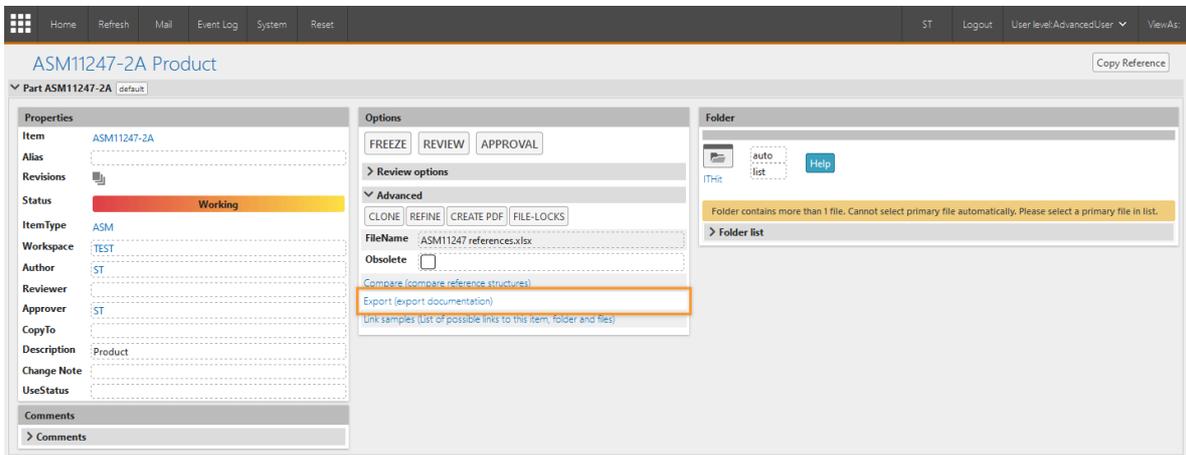
> **Note!**
>
> Export* requires one of the following user levels to be accessible: `AdvancedUSer` `SuperUser` `AdminRead` `AdminWrite` .

Clicking *Export* will treat the current item as the *Parent* item and show all referenced items as *children* items, also available for export:
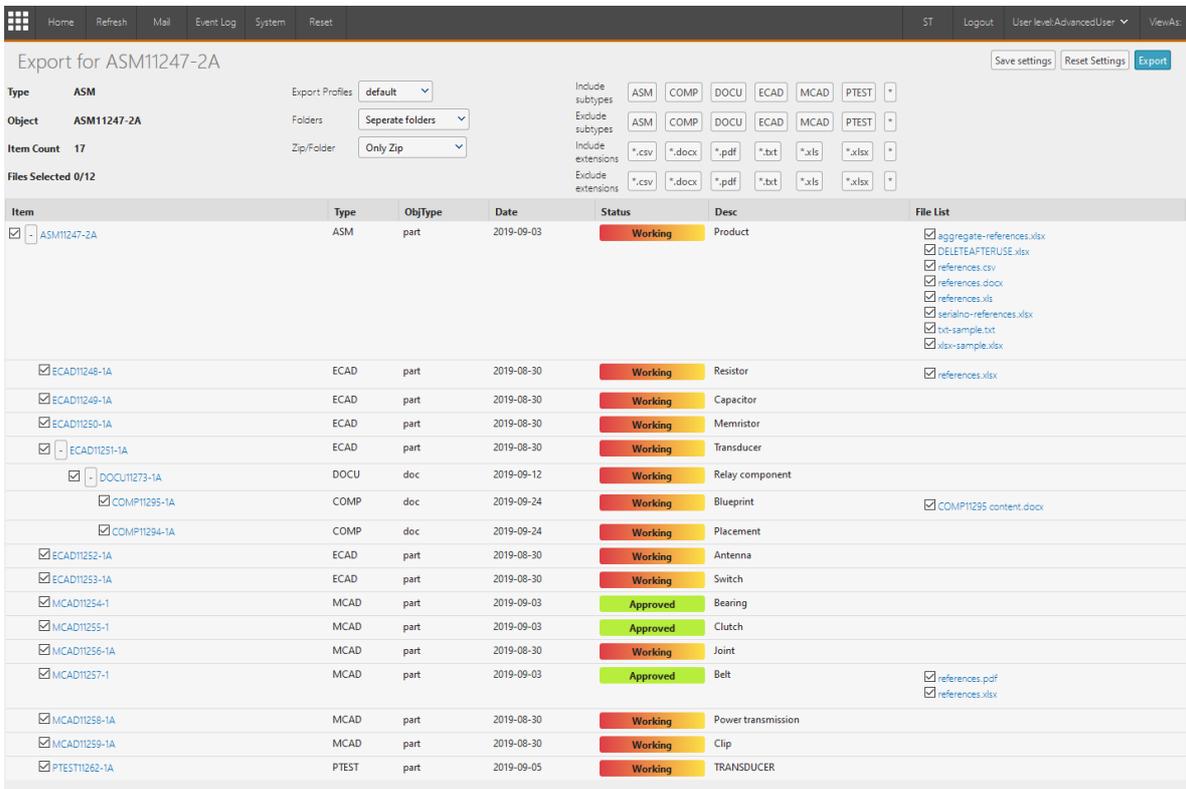
The list of available items for export is all referenced items to the parent item, from which you clicked *Export*. This makes it easy to export, for instance, a BOM (Bill Of Materials) of all parts and documents associated with a product.

3. Export interface

Clicking *Export* presents you with various settings and the full list of items, files and properties available for export:

Home Refresh Mail Event Log System Reset   ST Logout User level:AdvancedUser ViewAs:

Export for ASM11247-2A

Export properties

Type	ASM
Object	ASM11247-2A
Item Count	16
Files Selected	0/12

Export profiles

Export Profiles	default
Folders	Seperate folders
Zip/Folder	Only Zip

Folder settings

Include/Exclude subtypes and extensions

Include subtypes	ASM COMP DOCU ECAD MCAD PTEST
Exclude subtypes	ASM COMP DOCU ECAD MCAD PTEST
Include extensions	*.csv *.docx *.pdf *.rtf *.txt *.xls *.xlsx
Exclude extensions	*.csv *.docx *.pdf *.rtf *.txt *.xls *.xlsx

Save settings Reset Settings Save selection settings

Static file

Item	Type	Object type	Date	Status	Description	UseStatus	Project	File List
DOCU11235-1B	DOCU	doc	2019-09-26	Freeze	Guidelines		TEST	DOCU11235-1B Index.rtf / Guidelines.docx

Item selection / Data columns / File list

Item	Type	Object type	Date	Status	Description	UseStatus	Project	File List
ASM11247-2A	ASM	part	2019-09-03	Working	Product		TEST	aggregate-references.xlsx, references.csv, references.docx, references.xls, serialno-references.xlsx, txt-sample.txt, xlsx-sample.xlsx
ECAD11248-1A	ECAD	part	2019-08-30	Working	Resistor	Single Source	TEST	references.xlsx
ECAD11249-1A	ECAD	part	2019-08-30	Working	Capacitor		TEST	
ECAD11250-1A	ECAD	part	2019-08-30	Working	Memristor	Preferred	TEST	
ECAD11251-1A	ECAD	part	2019-08-30	Working	Transducer		TEST	
DOCU11273-1A	DOCU	doc	2019-09-12	Working	Relay component		TEST	
COMP11294-1A	COMP	doc	2019-09-24	Working	Placement		TEST	
ECAD11252-1A	ECAD	part	2019-08-30	Working	Antenna	Not for new design	TEST	
ECAD11253-1A	ECAD	part	2019-08-30	Working	Switch		TEST	
MCAD11254-1	MCAD	part	2019-09-03	Approved	Bearing		TEST	
MCAD11255-1	MCAD	part	2019-09-03	Approved	Clutch		TEST	
MCAD11256-1A	MCAD	part	2019-08-30	Working	Joint	Single Source	TEST	
MCAD11257-1	MCAD	part	2019-09-03	Approved	Belt		TEST	references.pdf, references.xlsx
MCAD11258-1A	MCAD	part	2019-08-30	Working	Power transmission	Restricted	TEST	
MCAD11259-1A	MCAD	part	2019-08-30	Working	Clip		TEST	
	PTEST	part	2019-09-05	Working	TRANSDUCER		TEST	

3.1. Export properties

Export properties provides you with a brief overview of the current *Export* status.

From here, you are presented with the following export properties:

- **Type** The subtype of the parent item
- **Object** The item ID of the parent item
- **Item count** The total number of selected items for export from the *Item selection* list.
- **Files selected** The total number of selected files for export from the *File list*.

3.2. Export profiles

An *Export profile* allows for you to select a pre-configured export profile. This profile can contribute with the following preconfigured settings:

- **Automatic selection of items and files**
  An export profile can be reconfigured to automatically select/deselect items based on it's subtype. Similarly, files from the file list can be automatically selected/deselected based on it's file extension.
- **Selection behavior**
  A selection behavior profile can be associated with an *Export profile*. This configures certain restrictions for selecting items and files for export. The following selection behaviors can be enabled for each *Export profile*:

Mode	Description
0	Select/deselect individual items and individual files for export
1	Selecting/deselecting a **parent** item also selects/deselects the associated files and the children item and files. Selecting/deselecting a **child** item also selects/deselects the parent items and files.
2	Selecting/deselecting **parent** items also selects/deselects children items and files.
3	Selecting/deselecting **children** items also selects/deselects the parent items and files.

- **Security measures**
  An *Export profile* can be configured to only be available to users with specific user levels. Thus, a number of profiles might be available or unavailable to you depending on your set Highstage user level.
- **Express export**
  An *Express Export profile* can be configured so that users with a specific user level, or lower, are not allowed to view and select/deselect items and files for export. Export is still available, but no items or files are available for selection. The item and file selection and settings for this export are pre-configured.

> **Notice!**
>
> For more information about your available *Export Profiles* and it's configuration, please contact your Highstage administrator.

3.3. Folder settings

The *Folder settings* has two available drop down menus:

- **Folders**

  Select whether the selected files should be separated into folders that are associated with each item or merged in a single folder.

- **Zip/Folder**
  Select whether the exported files should be exported only as a Zip folder or exported as a Zip and regular folder.

3.4. Include/Exclude subtypes and extensions

These settings makes it possible to easily select and deselect items and files of certain subtypes and extensions.

From these settings, you can:

- Select or deselect items in the list with specific **subtypes**.
- Select or deselect files in the list with specific **file extensions.**

All available subtypes and file extensions from the listed items and files are automatically listed here for easy 'bulk' selection.

3.5. Save selection settings

A user with a specific user level can access and save an explicit selection of items and files by clicking `Save settings`. This saves the current selection of items and files for export.

When users with lower user level selects the specific export profile where the selection was saved, these pre-selected items and files are selected by default.

The pre-selection can be reset by clicking `Reset Settings*`.

3.6. Static file list

A static file list, is a list of items and files that has been configured to be part of the available export items for a specific *Export Profile*. These static files are used as a supplement for the export profile and can consist of any items (parts, documents etc.) which is related to the export profile.

These static files can, for instance, contain instructions or descriptions for external stakeholders regarding the exported selection of items and files.

> **Notice!**
>
> For any information regarding static files for your available export profiles, please contact your Highstage administrator.

3.7. Item selection

The *Item selection* column contains the full list of items available for export. In this column, you can visualize the full 'tree-view' of parent items and referenced child items.

It is in this column that you manually select and deselect items for export.

> **Notice!**
> Take note that each export profile can have different selection behaviors . Read more about the available selection behaviors here.

3.8. Data columns

The *data columns* provides you with an overview of item properties for the items available for export.

> **Important!**
>
> It is important to note, that the listed item properties are not necessarily the properties that are exported. For any questions regarding which item properties are exported for a specific *Export profile*, please contact your Highstage administrator.

3.9. File list

The *file list* column contains the full list of files that are associated with each item. Here, you can select or deselect available files associated with an item to be included in the export.

> **Notice!**
> Take note that each export profile can have different selection behaviors . Read more about the available selection behaviors here.

4. Procedure

This process describes the procedure of exporting items and files from Highstage.

1. Navigate to any item in Highstage:

2. Ensure that you have the required user level enabled to gain access to the *Advanced* options. *Export* is available for `AdvancedUser`, `SuperUser`, `AdminRead` and `AdminWrite` level users:

3. Clicking **Advanced**>**Export (export documentation)** opens the *Export* feature in a new tab in your browser:
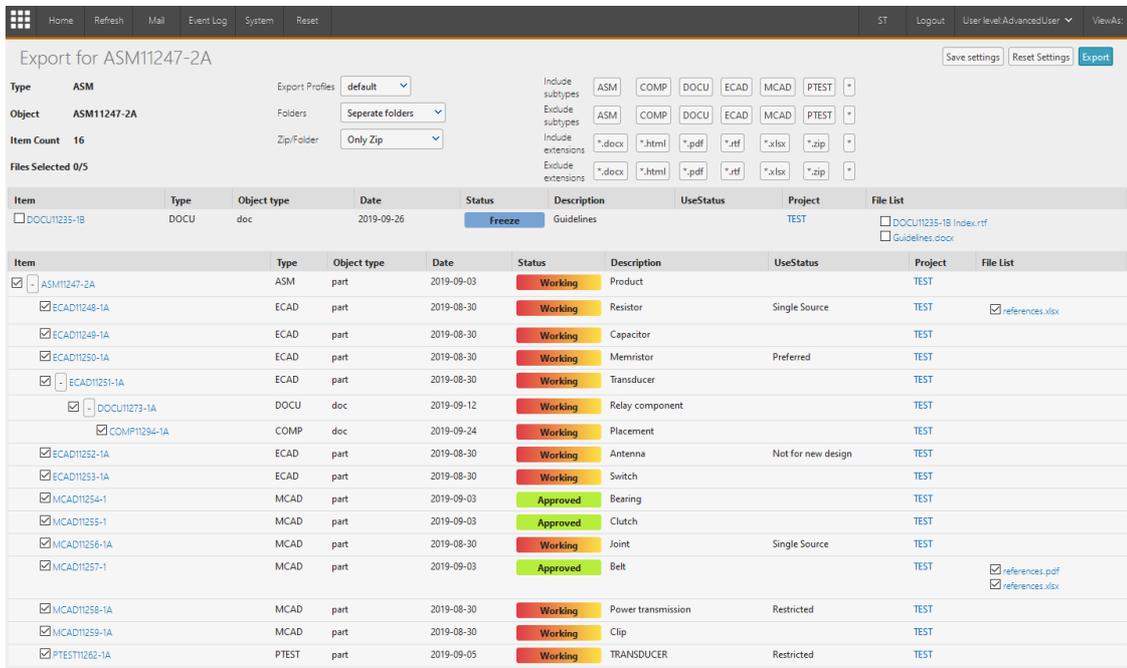
4. As a standard, the *default* export profile is selected. Select an appropriate *Export profile* and files and items from the item list view to be exported:
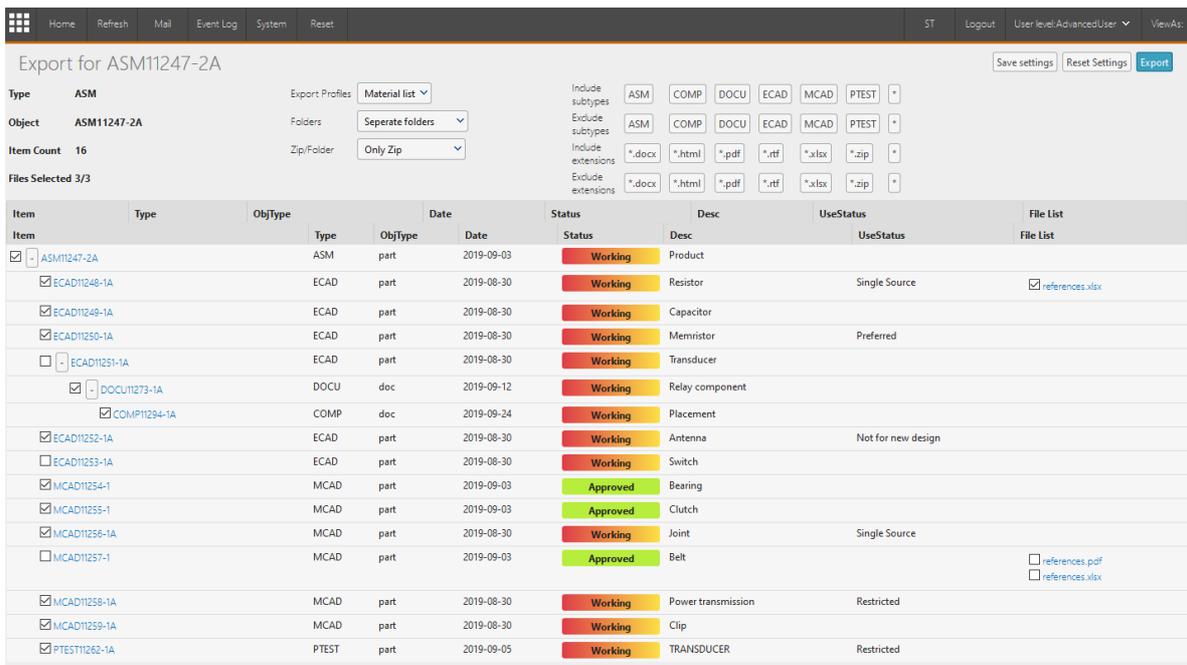
5. Clicking Export in the top right corner, will export the selected items and files.

A confirmation will be prompted. Clicking OK will export the selected items and files. Once completed, a link for download is made available in the export window:

6. The files are placed in the folder of the item, from where you accessed the *Export* feature:
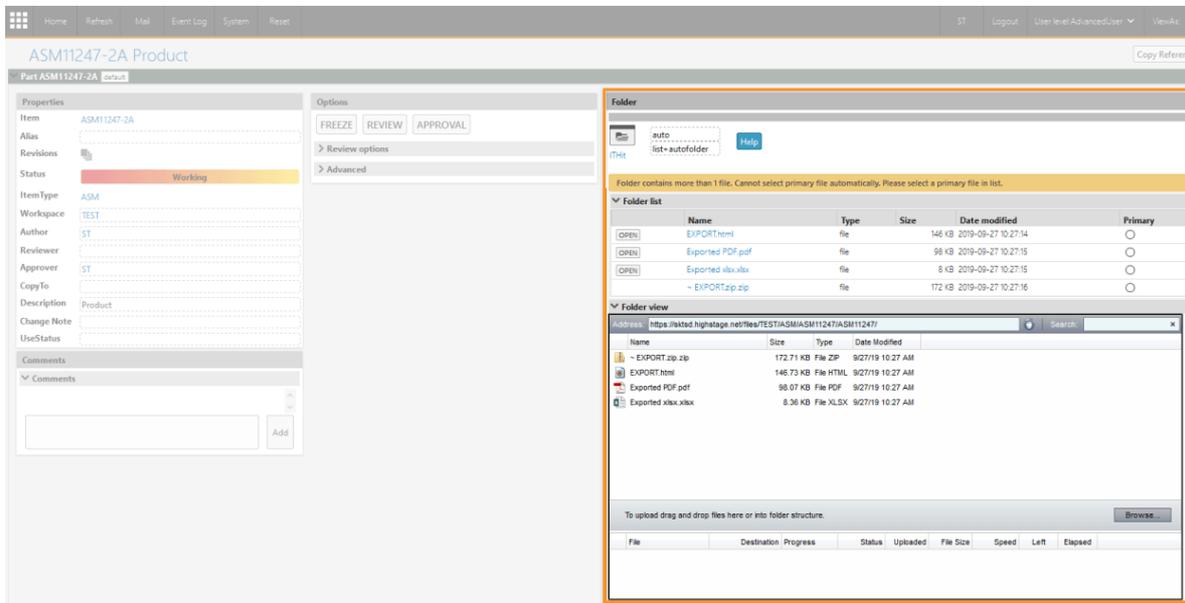
5. Exported items and file content

Depending on the configuration of the *Export Profiles*, a number of files are exported:
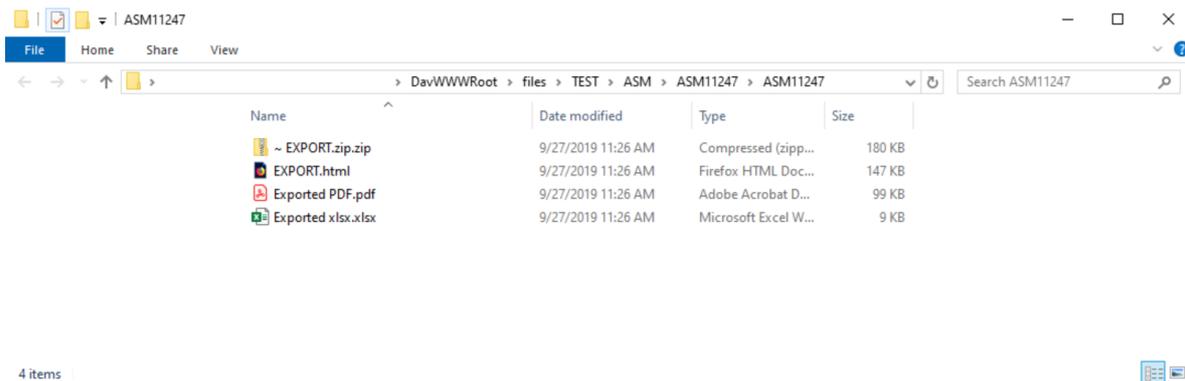
By default, a folder containing all exported files are outputted.

In addition, a number of additional `.html`, `.pdf` and `.xlsx` files containing the list of items and item properties can be outputted.

From our example, the exported `.PDF` contains the following item properties:

ASM11247-2A - Export

Item: ASM11247

Version: 2A

Title: Product

Status: Working

Export Date: 27 Sep 2019

Export Time: 11:38 AM

Item	Type	Description	Status	Date	note	qty	Object type	UseStatus	Project	Folder
ASM11247-2A	ASM	Product	1	2019-09-03 11:33:26	Unresolved col	part			TEST	ASM11247-2A
ECAD11248-1A	ECAD	Resistor	1	2019-08-30 15:33:57			part	Single Source	TEST	ECAD11248-1A
ECAD11249-1A	ECAD	Capacitor	1	2019-08-30 15:34:57			part		TEST	ECAD11249-1A
ECAD11250-1A	ECAD	Memristor	1	2019-08-30 15:35:25			part	Preferred	TEST	ECAD11250-1A
ECAD11251-1A	ECAD	Transducer	1	2019-08-30 15:35:41			part		TEST	ECAD11251-1A
DOCU11273-1A	DOCU	Relay component	1	2019-09-12 10:58:39			doc		TEST	DOCU11273-1A
COMP11294-1A	COMP	Placement	1	2019-09-24 08:55:43			doc		TEST	COMP11294-1A
ECAD11252-1A	ECAD	Antenna	1	2019-08-30 15:35:51			part	Not for new design	TEST	ECAD11252-1A
ECAD11253-1A	ECAD	Switch	1	2019-08-30 15:35:58			part		TEST	ECAD11253-1A
MCAD11254-1	MCAD	Bearing	5	2019-09-03 11:12:55			part		TEST	MCAD11254-1
MCAD11255-1	MCAD	Clutch	5	2019-09-03 11:13:12			part		TEST	MCAD11255-1
MCAD11256-1A	MCAD	Joint	1	2019-08-30 15:37:24			part	Single Source	TEST	MCAD11256-1A
MCAD11257-1	MCAD	Belt	5	2019-09-03 11:13:25			part		TEST	MCAD11257-1
MCAD11258-1A	MCAD	Power transmission	1	2019-08-30 15:37:47			part	Restricted	TEST	MCAD11258-1A
MCAD11259-1A	MCAD	Clip	1	2019-08-30 15:38:07			part		TEST	MCAD11259-1A
PTEST11262-1A	PTEST	TRANSDUCER	1	2019-09-05 12:14:02			part	Restricted	TEST	PTEST11262-1A

Exported with Highstage

Similarly, the exported `.xlsx` contains the following item properties:

Highstage