Document number	Revision
DOCU12221	2

Reference Import (User Guide)

Reference Import (User Guide)

- 1. Background
 - 1. 1. Procedure
 - 1. 2. Importing references to new items in Highstage

1. Background

Using the *Reference Import* feature allows for you to add and update references 'in bulk' to the current item from external files rather than doing so manually and for individual items in Highstage.

To find out where *Reference Import* is implemented in your Highstage installation and for which base- and subtypes, please contact your Highstage administrator.

1.1. Procedure

Navigate to an appropriate item where the *Import reference* button is available and where the associated external file with references is placed in the item folder:

Home	Refresh Mail Event Log System	Reset	ST Logaut Userlevel/AdminRead 🗸 ViewAs;
You are run	ning as AdminRead		
ASM11	261-1A Product		Copy Reference
✓ Part ASM1126	51-1A default		
Properties		Options	Folder
Item	ASM11261-1A	FREEZE REVIEW APPROVAL	> Security
Alias		> Review options	
Revisions	1	> Advanced	Help THE
Status	Working		Kternal reference file
Item type Workspace	ASM		Name Type Size Date modified
Author	(IES) ST		OPEN UPDATE+OPEN ASM11261 REFERENCES.xlsx file 9 KB 2019-09-05 11:06:56
Reviewer			
Approver	ST		
СоруТо			
Description	Product		
UseStatus			
> Mails [0] Cont	t. Add anna		
> Referenced b	w [0] page		
✓ Reference [0]	page		
Paste Scope:To	>p Tree-Vie v Import references Imp	ort references	
Page created 2 14ms/16KB RAM 16623 MB CoreCount 1	2019-09-05 11:10:24 CET		

Note!

On the basis of your implementation of Reference Import, you may be responsible for developing and placing the reference file in the folder directory. Please contact your Highstage administrator for more information about your process of importing references using *Reference Import*.

Home					
You are run	ning as AdminRead				
ASM11 ~ Part ASM112	247-2A Product 47-2A [default]				Copy Reference
Properties		Options	Import references from file		
ltem Alias	ASM11247-2A	FREEZE REVIEW	Add references to ASM11247-2A from file ASM11247 REFERENCES.xlsx		🍰 Filelocks 🕜 Help 🍰 Settings
Revisions		> Review options	Pending references to be imported		
Status	Working	> Advanced	Item pos qty Subtype ECAD11248-1A 1 1 ECAD	lame	Type Size Date modified
ItemType	ASM		ECAD11249-1A 3 1 ECAD A ECAD11250-1A 2 6 ECAD	SM11247 REFERENCES.xlsx f	Re 8 KB 2019-10-07 09:38:59
Author	TEST		ECAD11251-1A 2 7 ECAD		
Reviewer	(3) ()		MCAD11255-1 5 3 MCAD		
Approver	ST		PIESI11262-1A 6 2 PIESI There were items not found:		
Share With			Line no in file Basetyne nos atv		
СоруТо			9 part 23 54 CREATE		
Description	Product		10 part 2 34 CREATE		
UseStatus			Import summary:		
minDate*			Total Lines in file 10		
> Mails [0] Crea	te Add page		References for import 7		
> Referenced b	y [0] poge		References missing 3		
✓ Reference [0] page		Subtypes for import * Delete existing references Yes		
Paste Scope:1	op Tree-View Import references		Cancel Import references		
Page created 31ms/17KB RAM 15613 ME CoreCount 1	2019-10-07 09:45:25 CET		References from file		Highstage

Clicking *Import references* will prompt the following pop-up window:

These refences are extracted directly from the external file that is placed in the item folder of the current item:

Fil	e Home	Insert	Page	Layout I	Formulas	Data	Review	View H	Help Acr	obat (Crell me w	hat you want	to do	77			V 10			⊖Q si	hare
Pas	te 💉 Format Pa	inter	Calibri B I	∨ 1 <u>⊔</u> - ⊞	1 V A			≫ - e	Wrap Text Merge & C	enter 👻	General \$ - %	>.00 0.00 0.00 0.00	Condition Formattin	nal Format g + Table	as Cell • Styles •	insert D	elete Format	∑ Aut ↓ Fill ✓ Clea	oSum * A Z Sc ar* Fi	T & Find 8	2
	Clipboard	r ₂		Font		rs -		Alignmen	t	- Fa	Numb	er 🖙		Styles			Cells		Editing		
T1	•	\times	~	f _x																	٣
	А		В	с	D	E	F	G	н	1	J	К	L	м	N	0	P	Q	R	s	
1	tem	ро	s	qty																	
2 8	CAD11248-1A		1	1																	
3 E	CAD11249-1A		3	1																	
4 8	CAD11250-1A		2	6																	
5 E	CAD11251-1A		2	7																	
6 1	MCAD11254-1		5	3																	
7 1	MCAD11255-1		5	3																	
8 F	PTEST11262-1A		6	2																	
9 [OFE234543-12B		23	54																	
10 0	GOU453543		2	34																	
11 1	VICAD34543		2	5																	
12																					
13																					
14																					
15																					
16																					
17																					
18																					
19																					
20																					
21																					
22																					
23																					
24																					
25																					.
4	> Sh	eet1	(+)																		
			0																		

The opened *Reference Import* dialogue has three separate sections:

Home	Refresh Mail Event Log System Reset							S	T Logout	User level:AdminRe	ead 🛩 ViewAs:
You are run	ning as AdminRead										
ASM11	247-2A Product									Co	py Reference
✓ Part ASM1124	7-2A default										
Properties		Options	Import references from fil	le			×				
Item	ASM11247-2A	FREEZE REVIEW	Add references to ASM	11247-2A from file A	6M11247 R	EFERENCES.xlsx			2 Filelock	s 🕜 Help	🎝 Settings
Revisions	1) References to existing	items in Highstage	Pending references to be	imported							
Status	Working	 Advanced 	Item	pos 1	qty 1	Subtype	Name	Туре	s Size	Date modified	
ItemType	ASM		ECAD11249-1A	3	1	ECAD	ASM11247 REFERENCES x	sx fie	8 KI	3 2019-10-07 09:38:59	¢.
Workspace	TEST		ECAD11250-1A ECAD11251-1A	2	6	ECAD					
Author	ST		MCAD11254-1 MCAD11255-1	5	3	MCAD MCAD					
Approver			PTEST11262-1A	6	2	PTEST					
Share With	(31		There were items not four	nd:			2) References r	not found in Highs			
СоруТо			Line no. in file	Basetype	pos 23	qty 54 CREATE	2) Hererenocor	not round in right	lage		
Description	Product		10	part	2	34 CREATE					
Change Note			11	part	2	5 CREATE					
useStatus minDate*	3)		Import summary:				-				
Male (0)			References for import			10					
> Referenced b	(0) page		References not for import References missing			0 3					
✓ Reference [0]	page		Subtypes for import Delete existing references			* Ves					
Paste Scope:To	Tree-View Import references				Ca	ncel Import references	1				
Dana mented	2010 10 07 00-45-25 CET				Ua	Inporteierences	J				
31ms/17KB RAM 15613 MB CoreCount 1	019-10-07 09:49:29 CE1								Delivered by	nstage 🕻	

1. Pending references to be imported

These references will be imported to the current item, as they already exist in Highstage.

2. Items not found

These references does not currently exist in Highstage. These items can be created directly from this dialogue window and will automatically be added to the current item as a reference.

This section might not be available, if the configuration has been set, to now allow for the creation of new items based on non-identified items.

3. Import summary

This contains a summary of the imported references, as well as the settings for the import.

- 1. Total lines in file: The number of lines in the external file
- 2. **References for import:** Number of references, to existing items, that will be imported.
- 3. **References not for import:** Number of references explicitly omitted from the import.
- 4. **References missing:** Number of references in the external file to items not existing in Highstage.
- 5. **Subtypes for import:** Which references with specific subtypes are imported.
- 6. **Delete existing references:** Determines whether existing references will be deleted/refreshed on import.

By clicking Import references all the pending references will be imported as references to the current item:

Home	Refresh Mail Event Log System Reset							ST	Logout L	lser level:AdminF	lead 🛩 ViewA	51
You are runn	ing as AdminRead											
ASM112	247-2A Product									C	opy Reference	
✓ Part ASM1124	7-2A default											
Properties		Options	Import references from file	6		:	ĸ					
Item	ASM11247-2A	FREEZE REVIEW	Done importing reference	ces to ASM11247-2A fr	om file ASI	A11247 REFERENCES.xlsx					🍰 Settings	
Revisions		> Review options	Pending references to be in	mported								
Status	Working	> Advanced	Item	pos	qty	Subtype	-	Tuno	Size D	ato modified		
ItemType	ASM		ECAD11248-1A ECAD11249-1A	1	1	ECAD	ASM11247 REFERENCES.xlsx	fie	8 KB 20	19-10-07 09:38:5	9	
Workspace	TEST		ECAD11250-1A ECAD11251-1A	2	6 7	ECAD ECAD						
Author	ST		MCAD11254-1	5	3	MCAD						
Reviewer			PTEST11262-1A	6	2	PTEST						
Approver	ST		There were items not foun	nd:								
Share With			Line no. in file	Basetype	pos q	ty	-					
Description	Braduct		9	part	23 5	4 CREATE						
Change Note	Float		10	part	2 5	CREATE						
UseStatus			Import summary:									
minDate*			Total Lines in file			10	-					
> Mails [0] Create	Add page		References for import References not for import			7						
> Referenced by	[0] page		References missing			3						
✓ Reference [0]	page		Subtypes for import Delete existing references			Yes						
Paste Scope:To	p Tree-View Import references					0						
			Imported re	eferences		Close						
Page created 2 31ms/17KB RAM 15613 MB CoreCount 1	019-10-07 09:45:25 CET								Highs	tage		

Clicking Close will navigate you back to the item view where all the references from existing items in Highstage has been imported from the external file to the current item:

																				ViewAs:
You a	re run	ning as Ad	minR	ead																
AS	5M11	261-1A	Pro	oduct															Copy Ref	erence
Ƴ Part A	SM112	51-1A defau	k																	
Prope	erties	401411201	14					Optio	ns					Folder						
Alias		ASM11261	-1A					FREE	REVIE	APF	PROVAL			> Sec	urity					-
Revisi	ons	.						> Rev	view options					1	auto list	lp				
Status				W	orking			7 /10	Valiceu					✓ Fol	der list					
Works	уре space	TEST												OPEN		lame SM11261 REFE	RENCES visx	Type S	Date modifie 9 KB 2019-09-05 11:	ed 06:56
Autho	r	ST																		
Revie	wer ver	ST																		
СоруТ	0																			
Descri	ption e Note	Product																		
UseSt	atus																			
> Mails	[0] Creat	e Add pa	ge																	
✓ Refer	ence [0]	page																		
Paste	Scope:Te	op Tree-Vi	ew] [Ir	mport refe	erences															
_	ing (pag								Workspace	Author	Reviewer	Approver		ItemType	UseStatu	IS				
=	Item+		File	Folder	Status _	Desc	ription	Note					EventTime		rohs _	Value	Footprint	.lock	.qty .pos .c	omment
1	MCAD	11257-1	.xlsx (.pdf)	>	Approved	Belt			TEST	ST		ST	2019-09-03	MCAD				\checkmark	10000C	
2	MCAD	11254-1		>	Approved	Beari	ing		TEST	ST		ST	2019-09-03	MCAD				\checkmark	3 2	
3	MCAD	11255-1		>	Approved	Clute	:h		TEST	ST		ST	2019-09-03	MCAD				\checkmark	1 3	
4	MCAD	11259-1A	xlsx.	>	Working	Clip			TEST	ST			2019-08-30	MCAD					2 4	
5	MCAD	11256-1A		>	Working	Joint			TEST	ST			2019-08-30	MCAD					1 5	
6	MCAD	11258-1A		>	Working	Powe	er mission		TEST	ST			2019-08-30	MCAD					2 6	
7	ECAD	1252-1A		>	Working	Ante	nna		TEST	ST			2019-08-30	ECAD					(1) (7) (C	
8	ECAD	1253-1A		>	Working	Swite	:h		TEST	ST			2019-08-30	ECAD					1 8	
9	ECAD	1251-1A	docx	>	Working	Trans	ducer		TEST	ST			2019-08-30	ECAD				9	1 9	
10	ECAD	1249-1A		>	Working	Capa	icitor		TEST	ST			2019-08-30	ECAD					2 10	
11	ECAD	1250-1A		>	Working	Mem	nristor		TEST	ST			2019-08-30	ECAD				9	4	
12	ECAD	1248-1A	xlsx	>	Working	Resis	tor		TEST	ST)()(2019-08-30	ECAD		0000	()		1 12]

1.2. Importing references to new items in Highstage

Notice!

This section might be unavailable from specific *Ref Import* profiles. To find out if the creation of items based on non-identified references is available and permitted, please consult your Highstage administrator.

References to items from the external file, that does not exist in Highstage, needs to be created before a reference to the item can be made:

		늰			, nemen opo				✓ Folder	list								
Sta	itus		Working		> Advanced						Name			Туре	Size	Date modified	1	
Ite	тТуре	ASM							OPEN L	PDATE+OPEN	ASM11247 REF	ERENCES.xlsx		file	8 KB	2019-10-07 09:3	8:59	
Wo	orkspace	TEST																
Aut	thor	ST																
Re	viewer						Import references from	file			×							
App	prover	ST								55505N050								
Sha	are With						Add references to ASM	an1247-2A from file	A 5M11247 R	EFERENCES.XISX								
Cop	руТо						Pending references to be	e imported			-							
De	scription	Product					Item	po	s qty	Subtype								
Cha	ange Note						ECAD11248-1A ECAD11249-1A	3	1	ECAD								
Use	eStatus						ECAD11250-1A	2	6	ECAD								
mir	nDate*						ECAD11251-1A MCAD11254-1	2	7	ECAD MCAD								
) Ma	alle f01 Count						MCAD11255-1	roncos to ito	me not fr	und in Highetage								
> ma	foroncod b	e (A00 (page)					PTEST11262-1, Refe	erences to ite	ins not it	ound in Highstage								
✓ Ret	ference [7]	page					There were items not for	und:			-							
Paste	Scope To	n Tree-View I	nnort references				Line no. in file	Basetype	pos	qty								
Y Par	rt 17 Daga		nportretereteret			_	9	part	23	54 CREATE								
	the second second	1 21-	T-M-s	C dan da una	Description	New	10	part	2	5 CREATE	Item Tema	HanGdadur	Maker	to de	-			
=	ittem+	rite	roider	status_	Description	Note	Import summary:				Item type _	Usestatus_	value	.IOCK	.qty	.pos	.commer	
1	ECAD1	1248-1A .xls	>	Working	Resistor		Total Lines in file			40	ECAD	Single				1		
			'	Tronking			References for import			0		Source						
2	ECAD1	1250-1A	>	Working	Memristor		References not for import	t		0	ECAD	Preferred			6	2		
							Subtypes for import			3								
3	ECAD1	1251-1A	>	Working	Transducer		Delete existing reference:	s		Yes	ECAD				7	2		
4	ECAD1	1240.14			(Constant				Ca	Import references				0	1.14	16		
-	ECADT	1249-1A	>	Working	Capacitor				Ca	Inporteierences	ECAD				9 0			
5	MCAD	11254-1	>	Approved	Bearing		TEST ST		ST	2019-09-03	MCAD				3	5		
					-													
6	MCAD	11255-1	>	Approved	Clutch		TEST ST		ST	2019-09-03	MCAD			\checkmark	3	5		
7	PTEST1	1262-1A	>	Working	TRANSDUCER		TEST ST			2019-09-05	PTEST	Restricted			2	6		

This can done directly from the *Import Reference* dialogue for each reference by clicking Create next to each unidentified reference.

Creating the items from this dialogue ensures that the item is immediately added as a reference, and that the reference has all the associated reference attributes (In our example *Pos (Position) and qty (quantity)*).

Clicking Create from the list of unidentified items, a new tab will open, allowing you to create a new item in Highstage:

unning as Adn	ninWrite				
ate new Par	t				
e more					
ecreated 2019-09-05 6KB 16195 MB Count 1	12:43:02 CET		Delivers	aby ghstage	

Fill out the create form, and click CREATE :

Vou are running as AdminWrite Create new Assembly Type* ASM Workspace* FEST Description* ASSEMBLY Note: Full assembly Create more	Home	Refresh Mail	System	Reset	ST Loj	gout User level:AdminWrite 🗸	
Create new Assembly Type: ASM Workspace: TEST Description: ASSEMBLY Note: Full assembly (reate more CREATE	You are ru	nning as AdminWrite					
Type: ASM Workspace: TEST Description: ASSEMBLV Note: Full assembly Improved to the second	Create	new Assembly	у				
Workspace* TEST Description* ASSEMBLY Note: Full assembly Create more	Туре:*	ASM					
Description ASSEMBLY Note: Sassembly Create more CREATE Page Created 2019-09-05 12:50:13 CET ThrufoGS RAM 16185 M8 CoreCount 1 Delivered by Highstage	Workspace:*	TEST					
Note: Full assembly Create more	Description:*	ASSEMBLY					
Create more CREATE	Note:	Full assembly					
CREATE Page created 2019-09-05 12:50:13 CET Imp dKG RAM 15165 MB CoreCount 1	Crasta mora			4			
Page created 2019-09-05 12:50:13 CET Im://6/G RAM 16/185 M8 CorreCount 1	create more	CREATE	_				
Page created 2019-09-05 12:50:13 CET tims/9K3 RAM 10:185 MB CoreCount 1							
CoreCount 1	Page created 1ms/6KB RAM 16185 M	d 2019-09-05 12:50:13 (CET		Delive		\geq
	CoreCount 1					glistage	

This newly created item will immediately be added to the list of references that was previously imported:

Home	Refresh Mail Event Log System Reset		ST Logout UserlevelAdminWrite 🗸 ViewAs:
You are run	ning as AdminWrite		
ASM11	266-1A ASSEMBLY		Copy Reference
✓ Part ASM112	66-1A default		
Properties		Options	Folder
Item	ASM11266-1A	FREEZE REVIEW APPROVAL	> Security
Revisions		> Review options	auto
Status	Working	> Advanced	ITHit list
ItemType	ASM		Folder does not contain any files.
Workspace	TEST		
Reviewer	ST		
Approver			
CopyTo			
Change Note	ASSEMBLY Full assembly		
UseStatus			
> Mails 101 Creat	te Add page		
> Referenced b	Referenced or	n create	
Paste Scope:To	op Tree-View Import references		
Page created 31ms/15KB RAM 16187 MB CoreCount 1	2019-09-05 12:51:32 CET		

Closing the tab with the newly created item and updating the tab with the imported references by pressing Refresh or using the shortcut F5, will update the view to show that the newly created item has been instantaneously added as a reference on creation:

You a	re running as	Admin	Vrite																
AS ✓ Part A	5M11261- 5m11261-1a [1A Pr	oduct	t														Сору	Reference
Prope	rties					Options						Folder							
ltem	ASM1	1261-1A				FREEZE	REVIEW	APPRC	VAL			> Secur	ity						
Revisi	ons 🖳					> Review	options						auto	Help					
Status			W	forking		> Advand	ed					THit ✓ Folde	r list	_					_
ltemT Works	pace TEST													Name	261 DECC	ENICES view	Type Siz	e Date mo	dified
Autho	r ST											OPEN	UPDATE+OP	EN ASIMIN	201 NEFE	NEINCES.XISX	iie 9	KB 2019-09-0	5 11.00.50
Revie Appro	ver ver ST																		
СоруТ	D																		
Chang	ption Produ e Note	ct																	
UseSt	atus																		
> Mails	0 Create Add	page ige																	
Paste	Scope:Top Tre	e-View	Import ref	erences															
∨ Part [13] page						14/	A	Deviewee			Iter Torre		11					
Ξ	ltem+	File	Folder	Status _	Description	Note	_	_	_	-	EventTime	_	rohs	-	Value	Footprint	.lock	.qty .pos	.comment
1	ASM11266-1A		>	Working	ASSEMBLY	Full	TEST	ST)()	()	2019-09-05	ASM)()
2	MCAD11257-1	.xlsx (.pdf)	>	Approved	Belt		TEST	ST		ST	2019-09-03	MCAD					\checkmark	1.)t)()
3	MCAD11254-1		>	Approved	Bearing		TEST	ST		ST	2019-09-03	MCAD						3 2)()
4	MCAD11255-1		>	Approved	Clutch		TEST	ST		ST	2019-09-03	MCAD						1 3)()
5	MCAD11259-1	A .xlsx	>	Working	Clip		TEST	ST			2019-08-30	MCAD					\checkmark	2 4)()
6	MCAD11256-1	A	>	Working	Joint		TEST	ST			2019-08-30	MCAD					\checkmark	1 5) ()
7	MCAD11258-1	A	>	Working	Power transmission		TEST	ST			2019-08-30	MCAD						2 6) ()
8	ECAD11252-14		>	Working	Antenna		TEST	ST			2019-08-30	ECAD						1 7)()
9	ECAD11253-14	l.	>	Working	Switch		TEST	ST			2019-08-30	ECAD						1 8)()
10	ECAD11251-14	.docx	>	Working	Transducer		TEST	ST			2019-08-30	ECAD						19)()
11	ECAD11249-14		>	Working	Capacitor		TEST	ST			2019-08-30	ECAD						2 10)()
12	ECAD11250-14	5	>	Working	Memristor		TEST	ST			2019-08-30	ECAD						4 11)()

