

Document number	Revision
DOCU12221	2

# Reference Import (User Guide)

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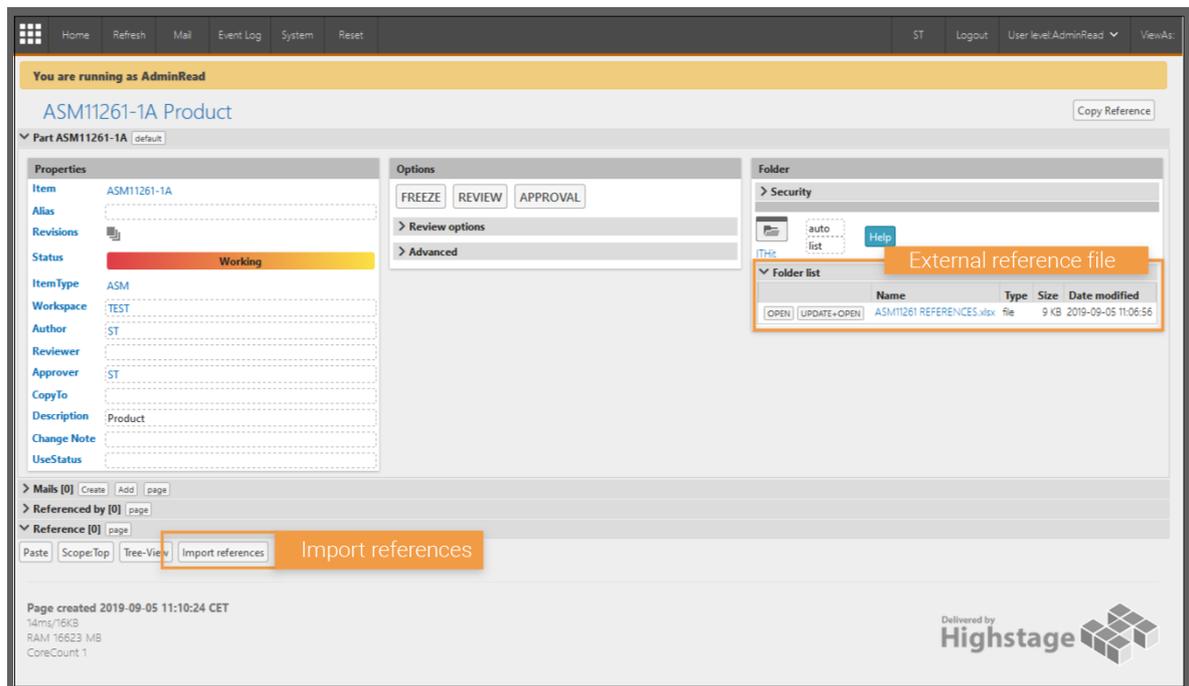
## 1. Background

Using the *Reference Import* feature allows 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

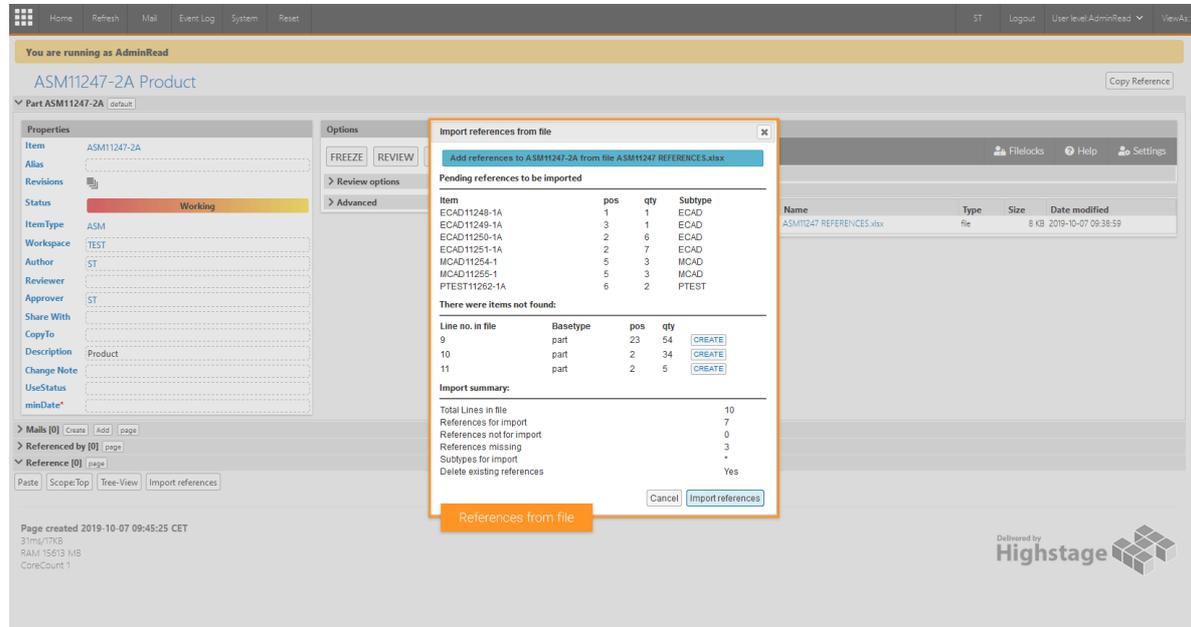
Navigate to an appropriate item where the *Import reference* button is available and where the associated external file with references is placed in the item folder:



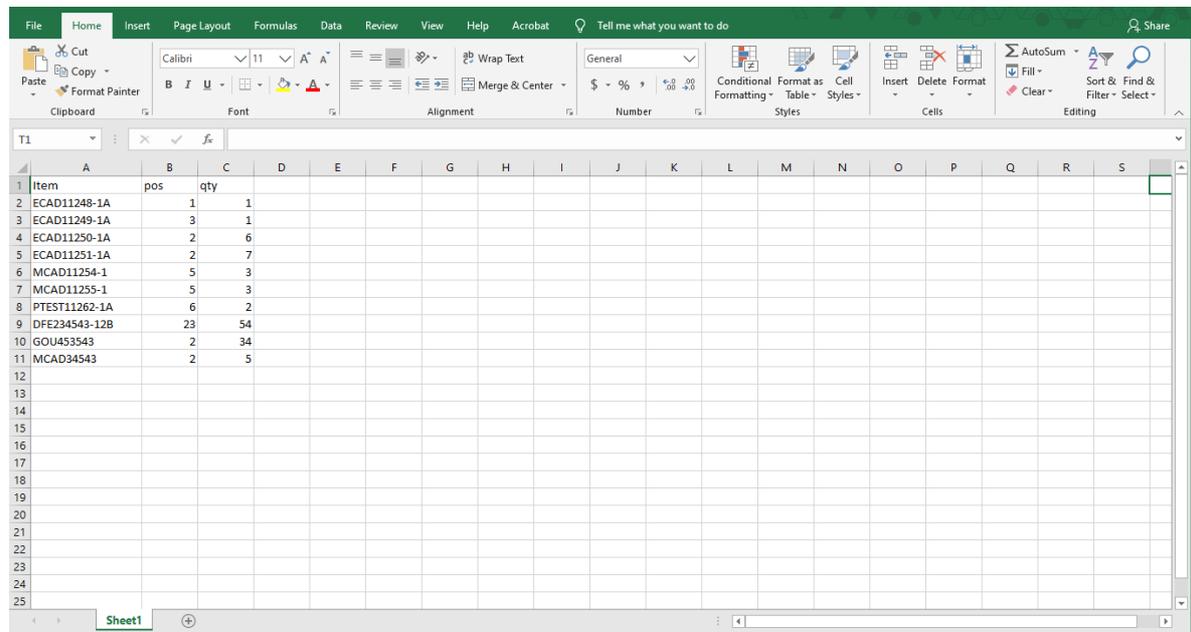
## Note!

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*.

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



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



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

### 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.

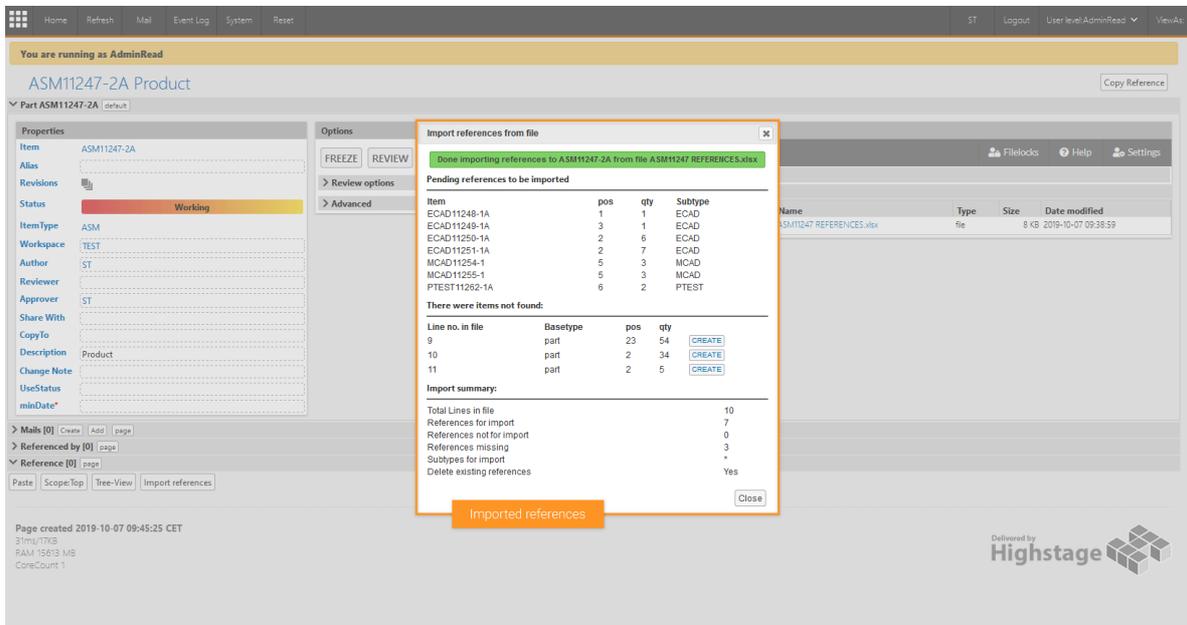
This section might not be available, if the configuration has been set, to now allow for the creation of new items based on non-identified items.

### 3. Import summary

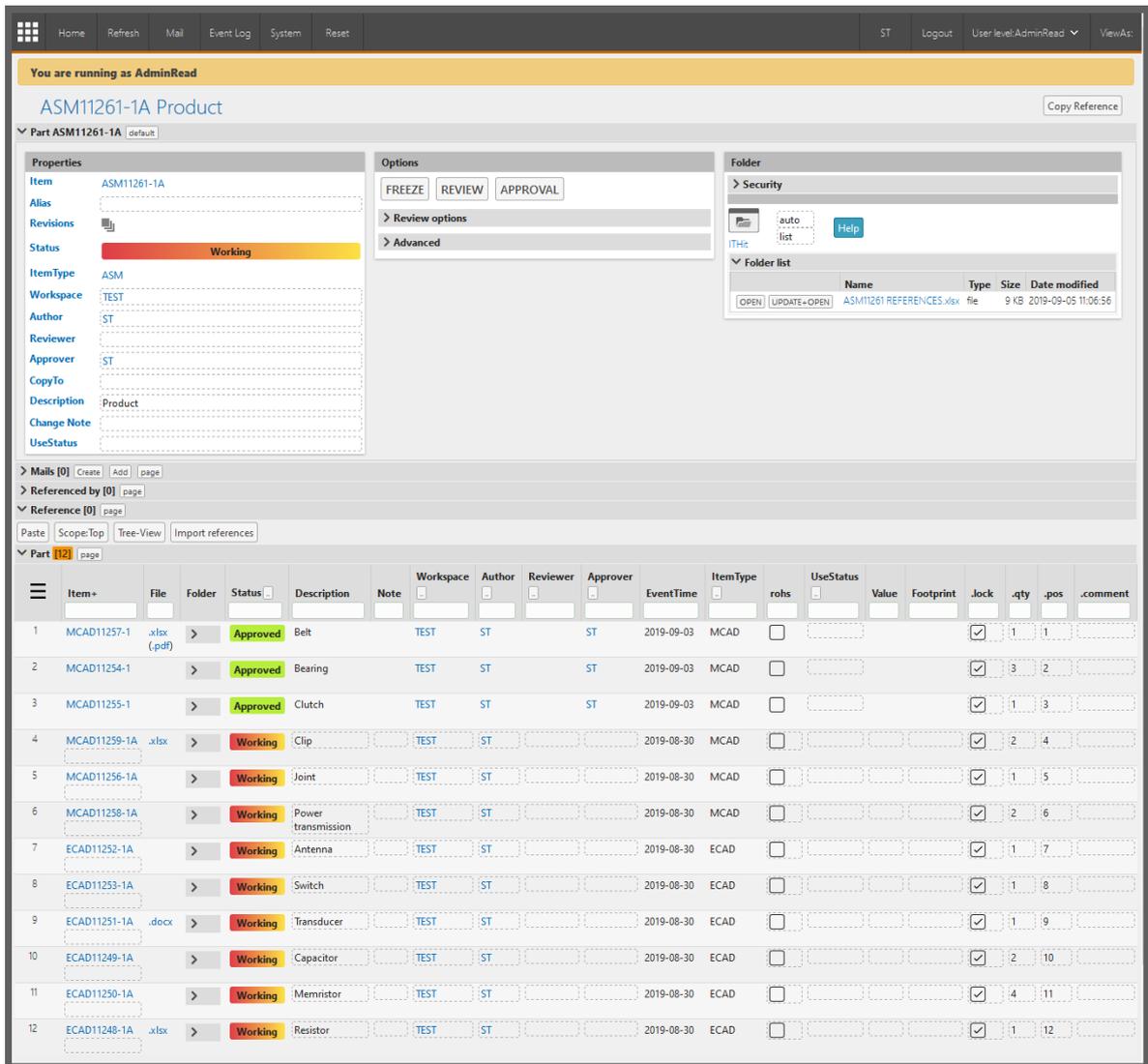
This contains a summary of the imported references, as well as the settings for the import.

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:



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:



## 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:

The screenshot shows the 'Import references from file' dialog box. It contains the following data:

Item	pos	qty	Subtype
ECAD11248-1A	1	1	ECAD
ECAD11249-1A	3	1	ECAD
ECAD11250-1A	2	6	ECAD
ECAD11251-1A	2	7	ECAD
MCAD11254-1	5	3	MCAD
MCAD11255-1			
PTEST11262-1			

References to items not found in Highstage:

Line no. in file	Basetype	pos	qty	CREATE
9	part	23	54	CREATE
10	part	2	34	CREATE
11	part	2	5	CREATE

Import summary:

Category	Count
Total Lines in file	10
References for import	0
References not for import	0
References missing	3
Subtypes for import	*
Delete existing references	Yes

This can be 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)*).

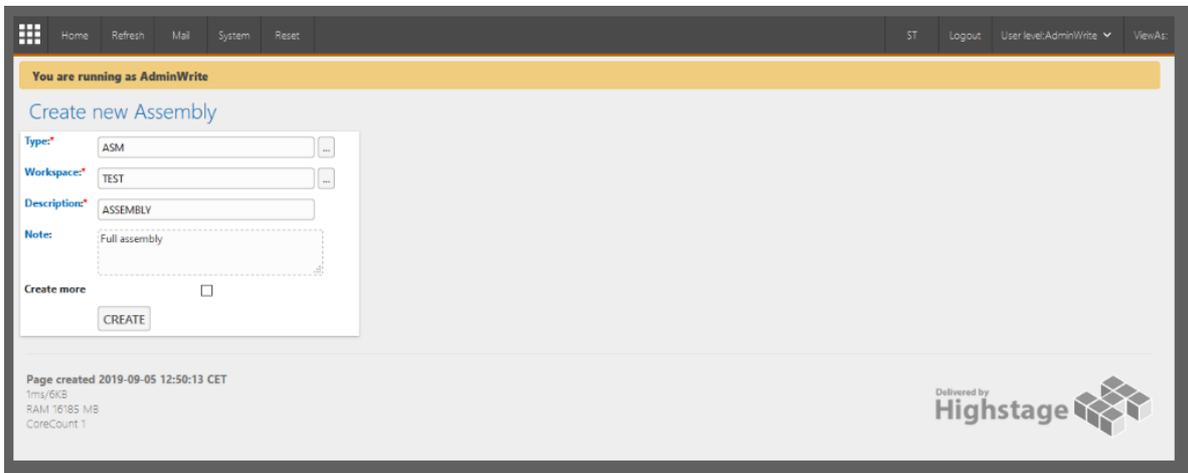
Clicking **Create** from the list of unidentified items, a new tab will open, allowing you to create a new item in Highstage:

The screenshot shows the 'Create new Part' form with the following fields:

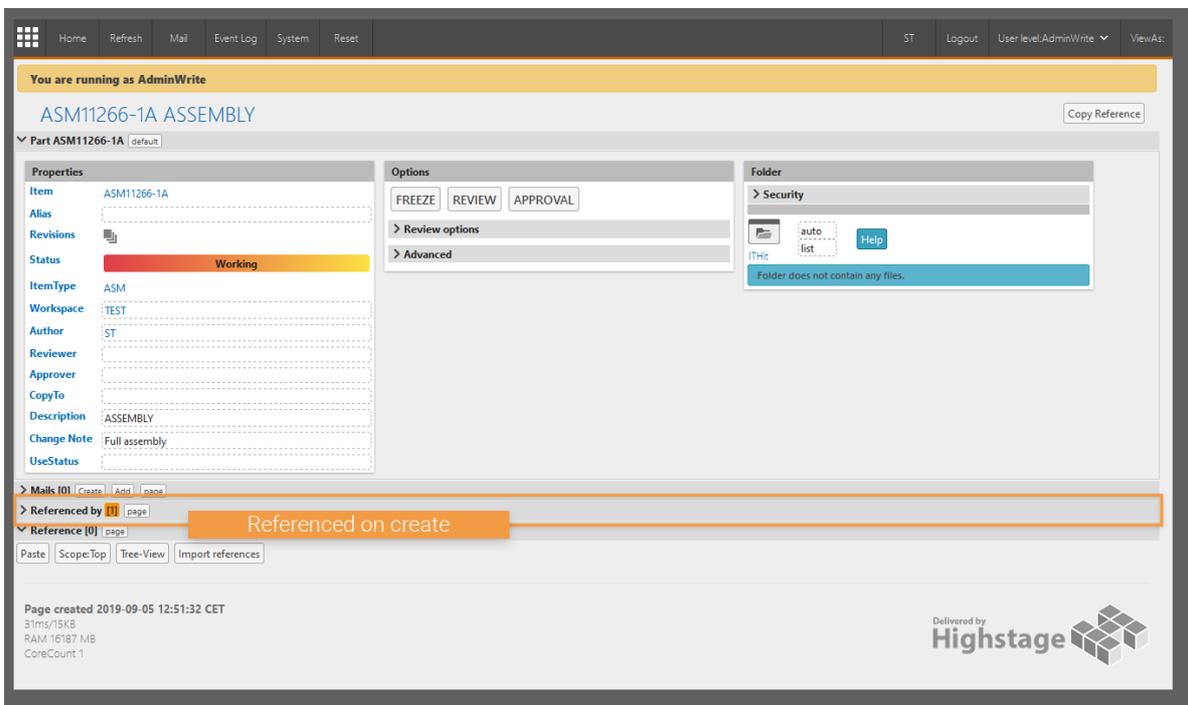
- Type: [ ]
- Workspace: [ ]
- Description: [ ]
- Note: [ ]

At the bottom, there is a **CREATE** button.

Fill out the create form, and click **CREATE**:



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



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:

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

You are running as AdminWrite

## ASM11261-1A Product Copy Reference

Part ASM11261-1A default

**Properties**

Item: ASM11261-1A

Alias: \_\_\_\_\_

Revisions:

Status: Working

ItemType: ASM

Workspace: TEST

Author: ST

Reviewer: \_\_\_\_\_

Approver: ST

CopyTo: \_\_\_\_\_

Description: Product

Change Note: \_\_\_\_\_

UseStatus: \_\_\_\_\_

**Options**

FREEZE REVIEW APPROVAL

> Review options

> Advanced

**Folder**

> Security

Help

ITHR

Folder list

Name	Type	Size	Date modified
ASM11261 REFERENCES.xlsx	file	9 KB	2019-09-05 11:06:56

OPEN UPDATE+OPEN

> Mails [0] Create Add page

> Referenced by [0] page

> Reference [13] page

Paste Scope:Top Tree-View Import references

> Part [13] page

Item#	Item+	File	Folder	Status	Description	Note	Workspace	Author	Reviewer	Approver	EventTime	ItemType	rohs	UseStatus	Value	Footprint	Lock	qty	pos	comment
1	ASM11266-1A		>	<span style="background-color: #ff9900; padding: 2px;">Working</span>	ASSEMBLY	Full assembly	TEST	ST			2019-09-05	ASM	<input type="checkbox"/>				<input checked="" type="checkbox"/>			
2	MCAD11257-1	.xlsx (pdf)	>	<span style="background-color: #92d050; padding: 2px;">Approved</span>	Belt		TEST	ST		ST	2019-09-03	MCAD	<input type="checkbox"/>				<input checked="" type="checkbox"/>	1	1	
3	MCAD11254-1		>	<span style="background-color: #92d050; padding: 2px;">Approved</span>	Bearing		TEST	ST		ST	2019-09-03	MCAD	<input type="checkbox"/>				<input checked="" type="checkbox"/>	3	2	
4	MCAD11255-1		>	<span style="background-color: #92d050; padding: 2px;">Approved</span>	Clutch		TEST	ST		ST	2019-09-03	MCAD	<input type="checkbox"/>				<input checked="" type="checkbox"/>	1	3	
5	MCAD11259-1A	.xlsx	>	<span style="background-color: #ff9900; padding: 2px;">Working</span>	Clip		TEST	ST			2019-08-30	MCAD	<input type="checkbox"/>				<input checked="" type="checkbox"/>	2	4	
6	MCAD11256-1A		>	<span style="background-color: #ff9900; padding: 2px;">Working</span>	Joint		TEST	ST			2019-08-30	MCAD	<input type="checkbox"/>				<input checked="" type="checkbox"/>	1	5	
7	MCAD11258-1A		>	<span style="background-color: #ff9900; padding: 2px;">Working</span>	Power transmission		TEST	ST			2019-08-30	MCAD	<input type="checkbox"/>				<input checked="" type="checkbox"/>	2	6	
8	ECAD11252-1A		>	<span style="background-color: #ff9900; padding: 2px;">Working</span>	Antenna		TEST	ST			2019-08-30	ECAD	<input type="checkbox"/>				<input checked="" type="checkbox"/>	1	7	
9	ECAD11253-1A		>	<span style="background-color: #ff9900; padding: 2px;">Working</span>	Switch		TEST	ST			2019-08-30	ECAD	<input type="checkbox"/>				<input checked="" type="checkbox"/>	1	8	
10	ECAD11251-1A	.docx	>	<span style="background-color: #ff9900; padding: 2px;">Working</span>	Transducer		TEST	ST			2019-08-30	ECAD	<input type="checkbox"/>				<input checked="" type="checkbox"/>	1	9	
11	ECAD11249-1A		>	<span style="background-color: #ff9900; padding: 2px;">Working</span>	Capacitor		TEST	ST			2019-08-30	ECAD	<input type="checkbox"/>				<input checked="" type="checkbox"/>	2	10	
12	ECAD11250-1A		>	<span style="background-color: #ff9900; padding: 2px;">Working</span>	Memristor		TEST	ST			2019-08-30	ECAD	<input type="checkbox"/>				<input checked="" type="checkbox"/>	4	11	

