

ProjectWise – Scan Reference and Link Sets

When documents are initially imported into ProjectWise existing relationships between them are kept but are not recognized or managed by ProjectWise. To establish the relationship for ProjectWise you need to scan the contents of the imported files using the Scan for Reference Files and Link Sets wizard in ProjectWise Explorer.

- Before you run this process you **MUST** be a user with write permissions

The wizard can be used to scan for various file types and for link sets:

- Scan and create a logical set for master DGNs and their references
 - When scanning DGNs for references, all supported vector reference formats will be scanned
- Scan and create a logical set for master DWGs and their xrefs
- Scan DGNs for the presence of link sets
- Scan and create a set for multi-file formats (Revit, shapfiles, rasters, .MIF, .TAB) and their related files

When is a typical time to run reference scans:

- After importing large quantities of files into ProjectWise
- After deleting and re-adding files of the same name, references are broken

There are two major parts when setting up the wizard:

1. Identifying master documents and where they are located. As you select folders and documents to scan, you can instruct the wizard to create new and update existing logical sets (the default) or to only create new logical sets
2. Setting up a method for how you want to search for the documents attached to master documents by:
 - a. Setting up a priority search – specifying which folders to search for references and defining a search priority for them
 - b. Setting up a proximity search – using the master documents folder or a folder above the masters folder as the starting point for scanning
 - c. Using both priority and proximity searches to scan

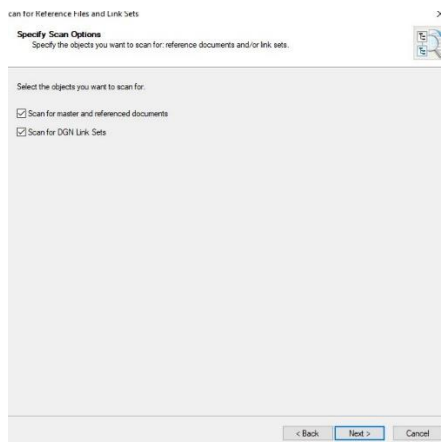
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Before you begin using the Scan for Reference Files and Links sets wizard ensure the below information:

- You are a user that has write permissions or an administrator
- All of the master/reference or link set files have already been imported into ProjectWise
- ProjectWise Explorer is installed

Once the above has been verified you will open the Scan for Reference Files and Link Sets Wizard

- Right click where you want to scan and select Scan References and Link Sets on the UPC
- Click next
- Click next again making sure that both options are selected



When files and their attachments are imported into ProjectWise their relationship is kept, however there are a few exceptions

- The relationship is not initially recognized by the ProjectWise database
- The relationship is not initially maintained by the ProjectWise database
- The purpose of the Scan References and Link Sets wizard first is to make these relationships know to ProjectWise – it will include any folders to which CAD files were recently imported
- You will want to select all folders containing new CAD files – unless you are sure the files have no references

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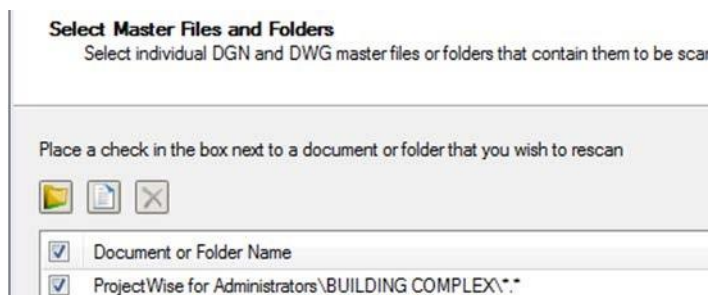
- There is no disadvantage to scanning a file without references – other than the time required to scan

Determine how you want to search for the referenced documents

- This involves specifying folders to search for references and the order to process them
- Note that search order becomes very important **IF** file names are not unique
- You can specify different folders to search along with the original folders
 - Use this method if you know where the files are

If you need to add items to scan then you will need to follow the below instructions

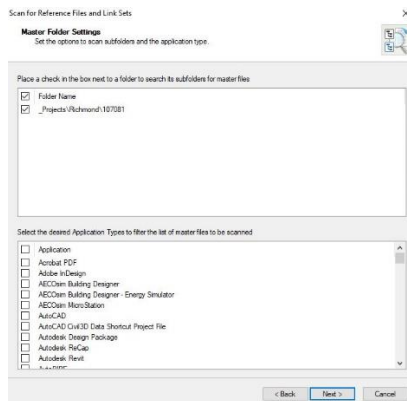
- Click the open folder icon (folders) or the sheet icon (individual documents)
- Check the check box to the left of any items you want to scan
- Click Next



- By default check boxes for items added to the list are checked so ProjectWise will scan everything. It will create new sets when necessary and update existing sets that are found.
- When a check box is un-checked ProjectWise bypasses existing sets for that folder or document and only scans items not already identified as master documents.
- If this is the first time you are scanning a particular folder or group of folders you do not need to re-scan.
- You will want to re-scan if you know that documents were referenced to or removed from existing logical sets.
- The Master Folder Settings page lets you include sub-folders and limit application types in the scan.

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- Leave all file types check on – even if all blank (as shown below)
 - This will scan all file types
- Click Next



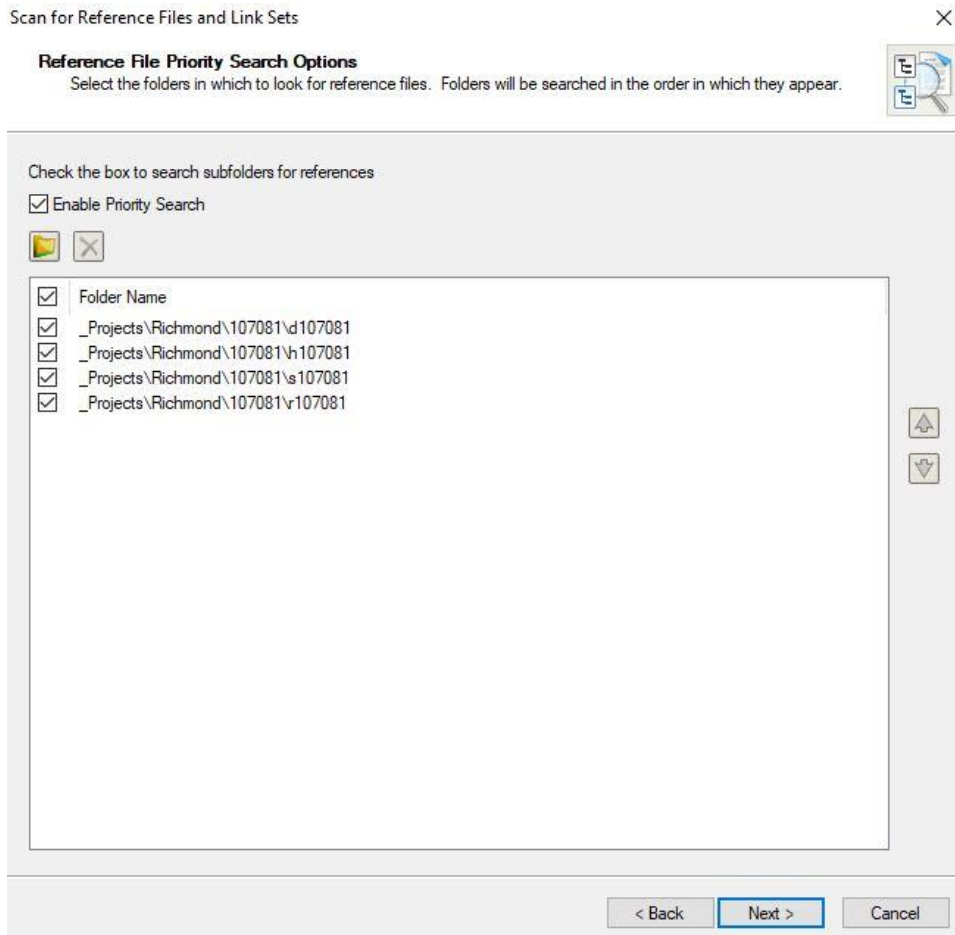
A Priority Search lets you select which folders to scan and the order to look for attachments. Check the check box to the left of any folder to search its sub-folders for references.

The search is performed in the order that the folders are listed

- Top folder first and bottom folder last
- To move folders up or down in the search order – select the folder in the list and click the up or down arrow
- If there is more than one file with the same name ProjectWise attaches the first one it encounters
 - It is critical to have the order of the priority search set up correctly
- Next you will click on the folder icon and go to the UPC
- Click the folder where to search for the files
- You will have to go in the priority order – where the most important files are located to least important

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- Click Next



A Proximity Search tells the scanner where to start the search

- It can be set to start in the folder found to contain master documents, the folder above that, or several folders above that
- When you perform an advance search that goes high in the folder structure and turn on scan sub-folders, you are ensuring that all neighboring folders of the selected folders are included in the scan
- To include sub-folders in the proximity search – check search all subfolders for references
- Select the Current Folder, Parent Folder, or specify the starting point for the scan
- If you select Advanced specify how many folders above the current folder you want to move before starting the scan

- Click Next

Scan for Reference Files and Link Sets

Reference File Proximity Search Options
Enabling Proximity search will attempt to locate reference files in the same folder as the master file or a specified number of folder levels above the master file. Optionally, subfolders can be searched.

Enable Proximity Search

Proximity Search Settings

Search Subfolders for References

Start Location:

Master File's Folder

Parent Folder (1 Folder Above the Master File's Folder)

Advanced:

Folders Above the Master File's Folder

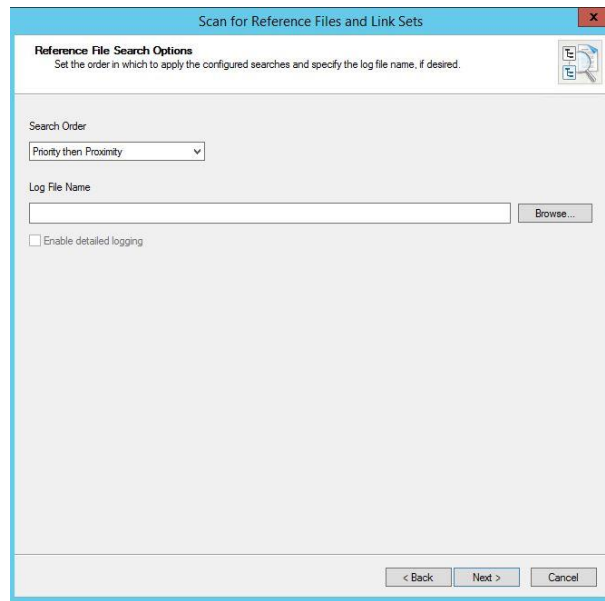
< Back Next > Cancel

Combination Searches

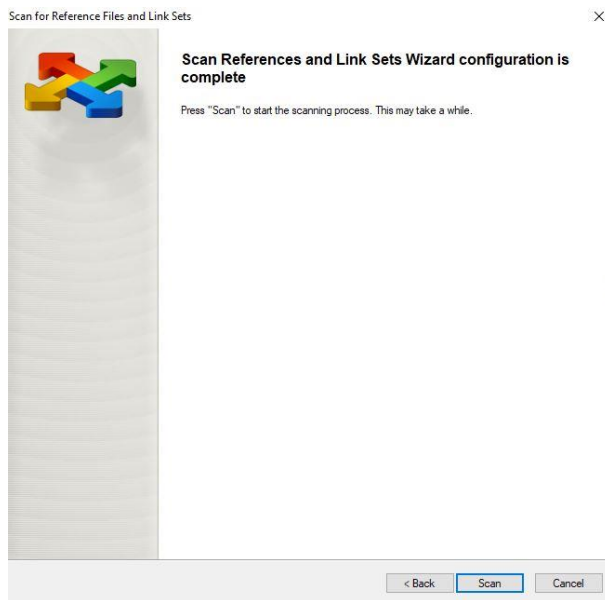
You can check both searching options to combine them

- If you use both Priority and Proximity searches then you must specify which to use first
 - It makes sense to do a Priority search and then a Proximity search
 - If there are duplicate matches then the search will stop at the first match
- When you combine searches the Search Order page opens so you can set the order in which priority and proximity searches are performed
 - This is only available if both types have been configured
- You can choose your search options as
 - Priority Only
 - Proximity Only
 - Priority then Proximity
 - Proximity then Priority
- Click Next
 - The below screen will appear
 - You can make a log file if you want to see the results

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- Click Next
- Click Scan



- You will then wait for the process to finish
- This process can take hours to complete depending on the number of files it needs to search