

Section 22

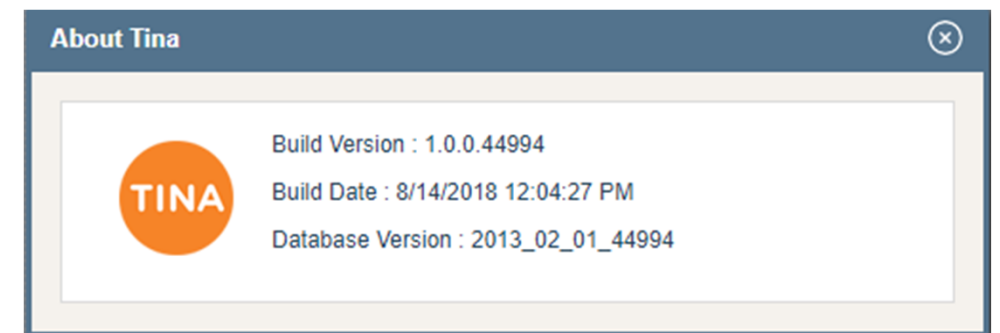
Tina5s User Guide – Bulk Uploading PDFs as Sub-Files to DWG Files

[Overview](#)

[User Guide Example Setup](#)

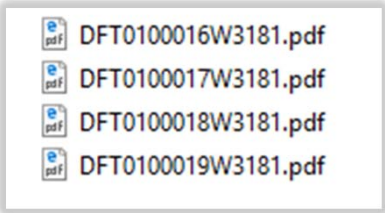
[Creating a Folder Rule](#)

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Overview

On Your Desktop:
Get your PDFs organized for Upload



In Tina:
Create a folder in your Favorites



In Tina:
Create a Folder Rule to extract the Document Number from the filename

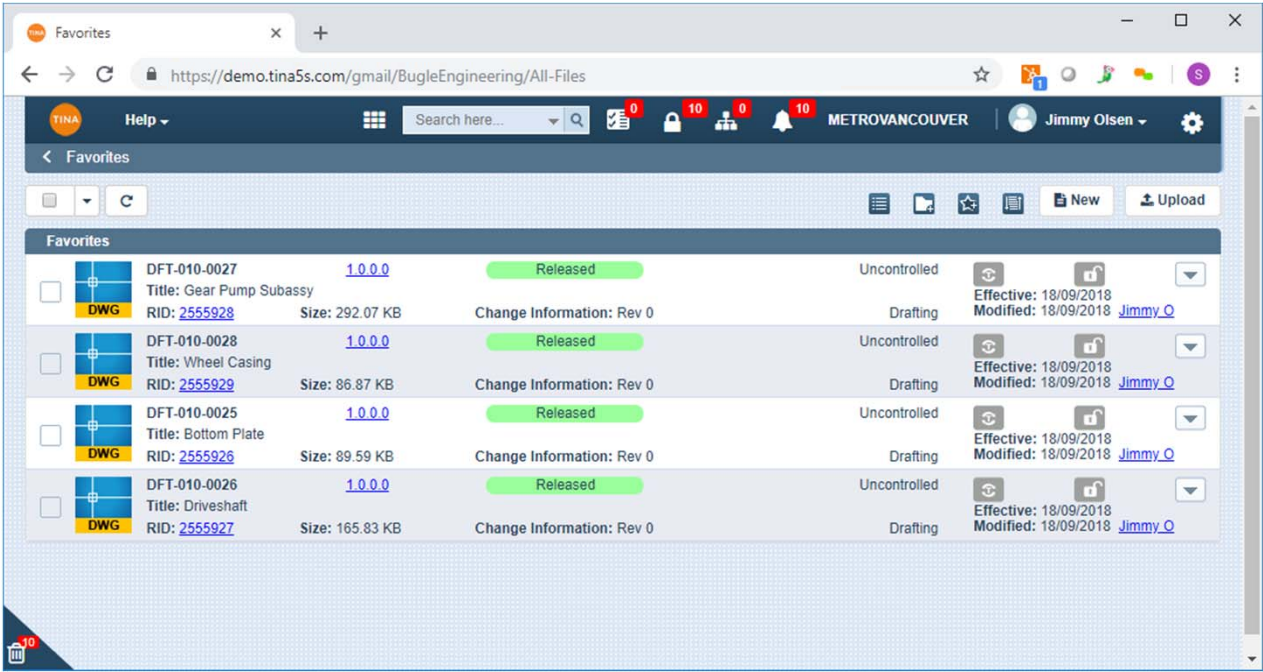
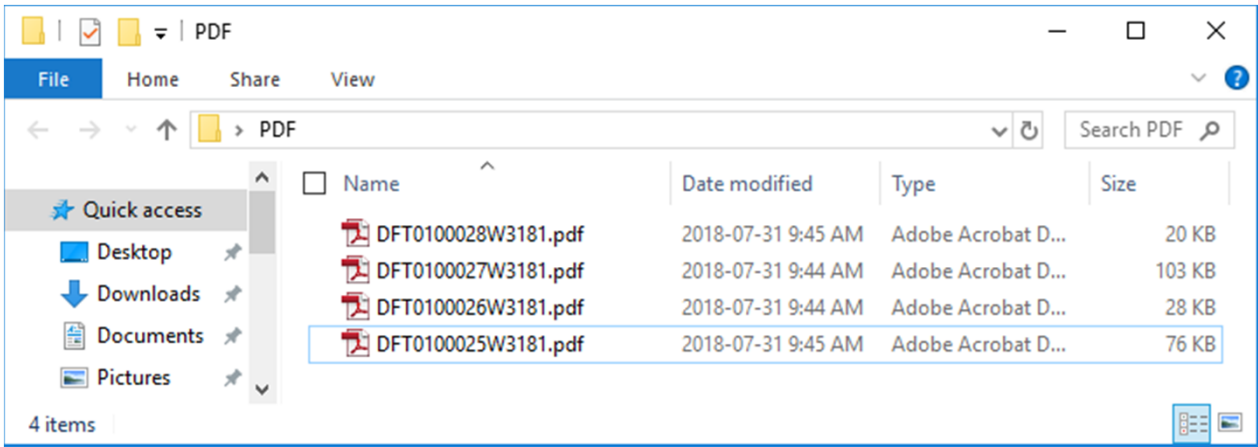


In TinaSync:
Drag and Drop (or Copy) PDFs to the folder with the rule



Outcome:
All PDFs with Parent DWGs in Tina are appended as sub-files

User Guide Example Set Up



The PDF files on the left exist in a folder outside of Tina (desktop, network drive, etc).

On the right, Parent DWG files exist in Tina and are in a Released state.

The filenames on the left all contain the Primary Identifiers (i.e. Drawing Number) as shown in Tina on the right. However, note that the filenames do not contain the hyphen separators as shown in Tina.

Creating a Folder Rule

Creating a Folder Rule

1

Create a folder to upload the sub-files to

2

Choose 'Create Rule' from the Action Menu

Note: Parent files are shown here, but they do not need to be in your Favorites to upload the PDFs as sub-files

3

Choose 'Create Rule' on the Folder Rule Summary Pop Up

4

Describe and name you rule and identify the file type you'll be uploading as a sub-file

5

Provide information that you know about the Parent files

6

Folder Rule Summary

Rules currently associated with this folder:

Files that you upload to this folder are managed as sub-files. Parent files in Tina will be searched for and found based on the following rule criteria:

Rule Name	Sub-file Type	Matched file Type
No data to display		

Go to page: 1 Show rows: 50 0-0 of 0

If a single parent match is found: the file you upload to this folder will be automatically attached to its parent as a sub-file and it will be automatically delinked from this folder.

If there's no parent match (or more than one parent match): it will be uploaded as a new file in Tina and will remain linked to this folder so you can take further action on it later.

Before uploading sub-files to this folder, check parent matches based on the current rule setting and the names of the files you plan on uploading.

Check Matches

Create Rule (Wizard)

Create a folder rule to specify what happens to files that are uploaded into Tina as sub-files.

Rule Name *

Upload PDF to Released DWG

Rule Description

Upload PDF to Released DWG

Select the action you want to perform

Create Sub-file

Choose the file types that will be uploaded as sub-file *

pdf

Parent files for your sub-files need to be found – specify what you know about the parent files to narrow the search down.

Parent file category
(if you don't specify a category then all will be searched)

Drafting

Parent file type
(if you don't specify a file type then all will be searched)

dwg

Parent file lifecycle state
(if you don't specify a lifecycle state then all will be searched)

Released

Next

Save

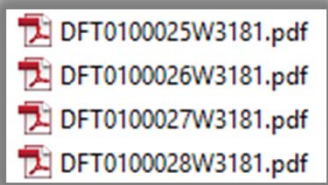
Save & Close

Close

Creating a Folder Rule (Cont'd)

The objective of this pop up is to FULLY define the pattern of the filename which is comprised of discrete sequences that are either alphanumeric (Text) or Separators (like '-' or '_' for example).

Note that this example does not contain any separators in the filenames:



2 Breakdown the filename into ALL of its sequential elements

If more than one pattern exists, you can add multiple patterns to the folder rules.

The defined pattern for this example has 4 distinct sequences: XXXXXXXXXXText

Choose from the options 'Text' or 'Separator' that present when you click in each cell.

Specify the Text or Separator Value if it consistently and exactly appears in the filename pattern otherwise leave cells blank.

If no value is specified, you can specify the number of characters in the sequence. If the length varies, don't specify it.

1 Provide an appropriate name for the filename pattern

3

Edit Rule-Upload PDF to Attached DWG

Breakdown the filenames of the sub-files you'll be uploading

+ Add Filename Pattern

Filename Pattern Name * Filename Contains PID Pattern XXXXXXXXXXXText x Delete

Sequence	Field Type	Value i	Length i	Delete
1	Text		3	x
2	Text		3	x
3	Text		4	x
4	Text			x

Back Next Save Save & Close Close

Creating a Folder Rule (Cont'd)

This pop up is focused on refining the Parent search criteria based on the filename pattern sequences you just defined on the previous pop up.

The goal is to refine the search criteria to the point where only one single Parent in Tina can be found for each of the PDFs you'll be uploading as sub-files.

As you build it out, the search filter you define will appear here.

These search criteria were defined two pop ups ago – use the 'Back' button if you want to make any changes.

2

Click on the 'Add' button to add a criteria row

Note: all defined sequences do not need to be used to refine your search. In this case, Sequence 4 is not relevant to finding a single parent match

3

Choose appropriate operators, fields and criteria as they relate to each pattern sequence of interest

Click on the 'Edit Filter' button

1

Edit Rule-Upload PDF to Released DWG

Based on the folder rules you've set up so far, Tina will search for sub-file parents as follows:
Category = *Drafting*
File Type = *dwg*
Lifecycle State = *Released*

To find a one parent match for each sub-file, refine the search by setting up filters based on key fields in Tina that are associated with defined.

Filename Pattern Name	Pattern	Filter	Delete Filter
Filename Contains PID	XXXXXXXXXXText	Edit Filter	X

Add

Filter Criteria

Primary Identifier Contains Filename Contains PID(1) AND Primary Identifier Contains Filename Contains PID(2) AND Primary Identifier Contains

Operator	Field	Criteria	Filename Pattern N...	Pattern Sequence	Delete
Please Choose:	Primary Identifier	Contains	Filename Contains ...	1	X
AND	Primary Identifier	Contains	Filename Contains ...	2	X
AND	Primary Identifier	Contains	Filename Contains ...	3	X

Back

Next

Save

Save & Close

Close

4

Creating a Folder Rule (Cont'd)

This pop up is focused on checking before uploading to confirm that all files have a single Parent in Tina.

TIP: To quickly create a filename list, choose all files in Windows Explorer, press and hold the Shift key and right click to expose the menu. Select the otherwise hidden option 'Copy as Path' and paste into Excel. This list can be quickly massaged using the Excel Text-to-Column feature to arrive at a list of filenames that can be copied and pasted into this pane.



These are the 4 files in Windows Explorer that we'll be uploading as sub-files.

In this case, every sub-file has a single and unique Parent file in Tina – all may be successfully uploaded.

1
Copy and paste a list of the filenames (no extensions) you will be uploading as sub-files

2
Click on 'Check Parent Match'

Upload PDF to Released DWG

Filename Pattern Name	Pattern	Filter Criteria
Filename Contains PID	XXXXXXXXXXText	Primary Identifier Contains Filename Contains PID(1) AM

Check Parent Match in Tina

Copy and paste a filename list of the sub-files you will be uploading

DFT0100025W3181
DFT0100025W3181

Check Parent Match

Sub-file Title	Parent Count	RID	Identifier	Title	Version	Change Information
DFT0100028W3181	1	2555929	DFT-010-0028	Wheel Casing	1.0.0.0	Rev 0
DFT0100027W3181	1	2555928	DFT-010-0027	Gear Pump Subassy	1.0.0.0	Rev 0
DFT0100026W3181	1	2555927	DFT-010-0026	Driveshaft	1.0.0.0	Rev 0
DFT0100025W3181	1	2555926	DFT-010-0025	Bottom Plate	1.0.0.0	Rev 0

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Back Close

3
All good! If not, you can always go back or modify your rules later.

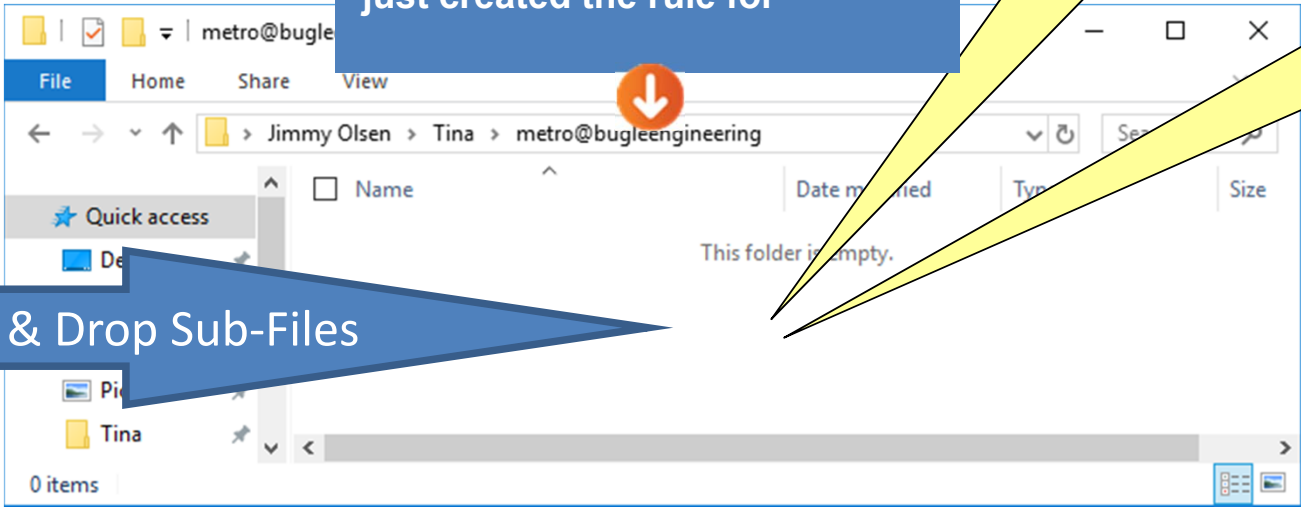
Uploading Sub-Files

Uploading Your Sub-Files

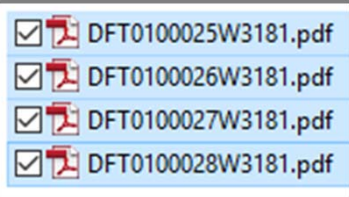


1
Click on the TinaSync tray icon to open TinaSync Folder

2
Navigate to the folder that you just created the rule for



Any sub-files that have more than one Parent (or no Parent) will not be uploaded and will remain here for you to take further action on.



3 Drag & Drop Sub-Files

This is the outcome for all files with Parent matches

