CTC SOFTWARE

A SYMETRI COMPANY

CTC Casework Configurator™ User Guide

Contents

Suite Overview

The products from CTC Software offer many utilities for enhancing the productivity of users of Revit® software from Autodesk®. Revit users launch these tools from within the Revit software.

Although written to function correctly with the international community in mind wherever possible, CTC Software products are currently only tested on English USA versions of Revit running on English USA versions of Windows.

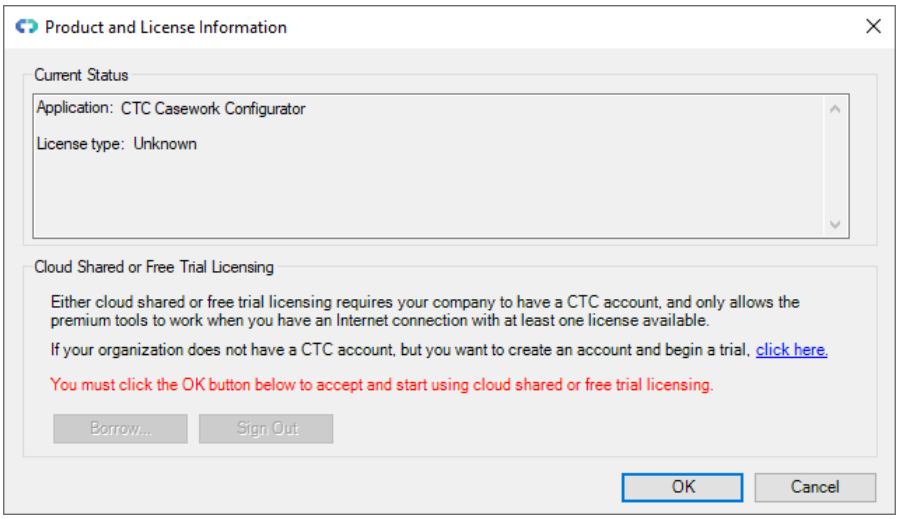
Installation and Configuration

The standard workstation installation requires little more than running the setup program. For more information regarding topics such as automating workstation installations and preconfiguring workstation settings, please refer to the *CTC BIM Suites Installation and Configuration Guide* document.

License Activation and Management

The productivity tools provided with light background colors are free tools that run without any special licensing. The productivity tools provided with dark background colors are premium tools which require licensing.

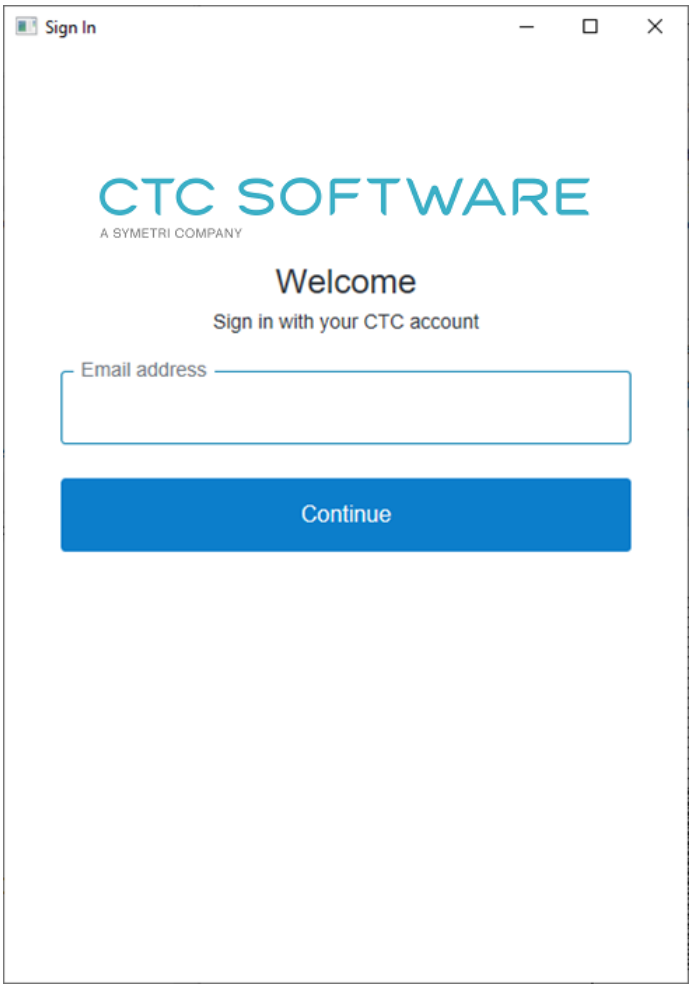
Unless initially preconfigured by the system administrator, the first time any of the licensed tools are launched from the Revit ribbon, the *Product and License Information* dialog will appear which requires acknowledging the licensing requirements by clicking the OK button at the bottom.



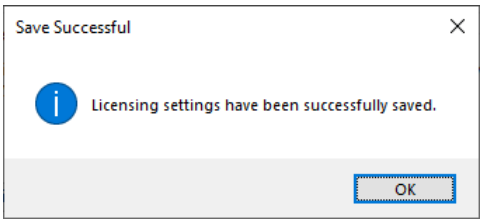
CTC Software products support only cloud-shared licensing, and also free trial licenses that use CTC's cloud licensing engine. You must click the OK button to activate the cloud licensing and acknowledge using a CTC cloud account.

The licensing will automatically apply to all of the tools that are included in the suite which require licensing. So once the first tool has configured the licensing, the other premium tools in the suite will automatically use the same configuration.

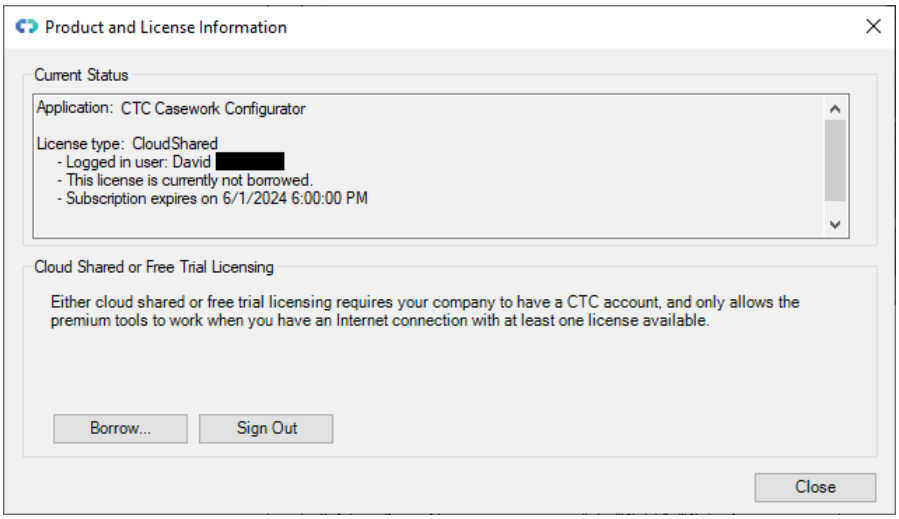
Once you click the OK button, you may be asked to login, if you aren't already logged in from using another CTC product:



Either way, once you have logged in, the product will be configured for cloud shared licensing:



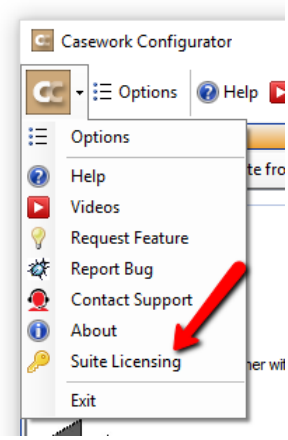
and the licensing screen will be updated to show that:



At this point, you may borrow a license for offline use (if permitted by the administrator). You may also Sign Out from the cloud licensing system in case a different user needs to sign in on this computer.

Changing Licensing at Any Time

Licensing can also be changed at any time using the "Suite Settings" tool, which is discussed below, or by using the "Suite Licensing" menu choice in the licensed add-in tools:



Borrowing a Cloud Shared License

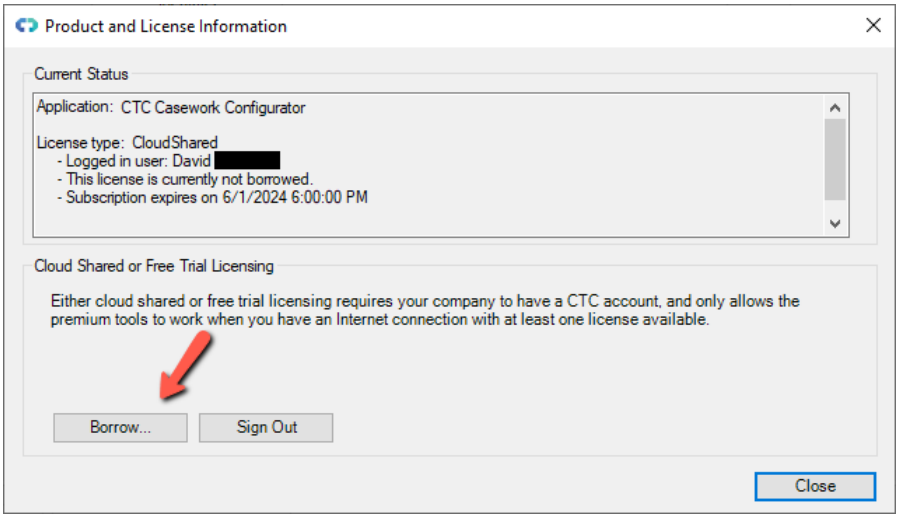
If a license is needed in anticipation of being disconnected from the Internet, borrowing a license can ensure that the CTC tools are available for use when offline.

IMPORTANT: For normal use of the software, where you have a standard Internet connection, you DO NOT need to borrow a license. Borrowing a license is normally only needed when you know you will need to use the software at a time when you won't have a reliable Internet connection. While you have a license borrowed, that is one less shared license available to all other users.

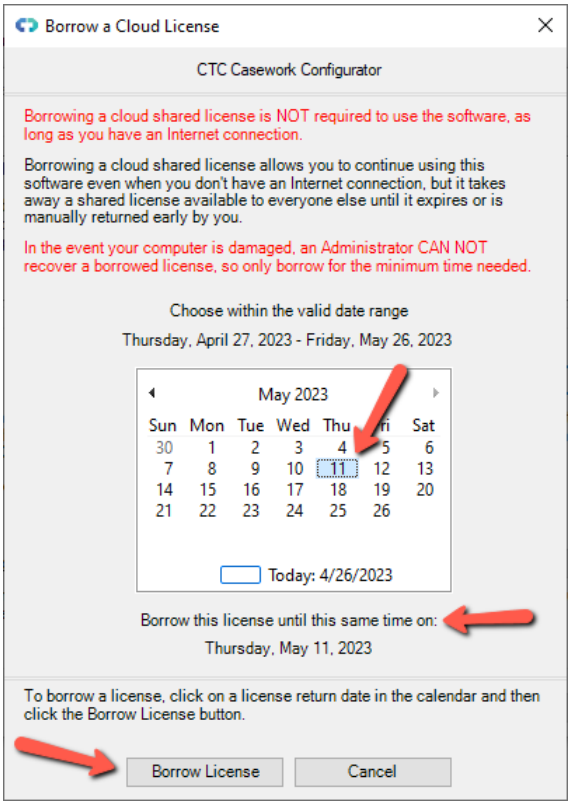
NOTE: Borrowing is only available for purchased cloud shared licenses. **Borrowing is not available for trial licenses.**

IMPORTANT: In the event your computer is lost, stolen or damaged (e.g. a hard drive crash) **an administrator CAN NOT recover a borrowed license.** In that case, the license will be unavailable to all users until the borrow period has naturally expired. *As such, you only want to borrow a license for the barest minimum amount of time needed.*

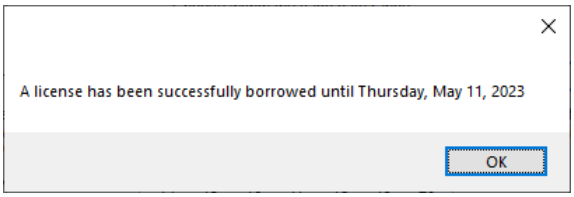
Begin by opening the *Product and License Information* screen from either the main pulldown menu of a premium tool, or from the Suite Settings add-in. From here, click the 'Borrow…' button to begin the process of choosing the length of time to borrow a Cloud Shared license.



The date selector should appear:

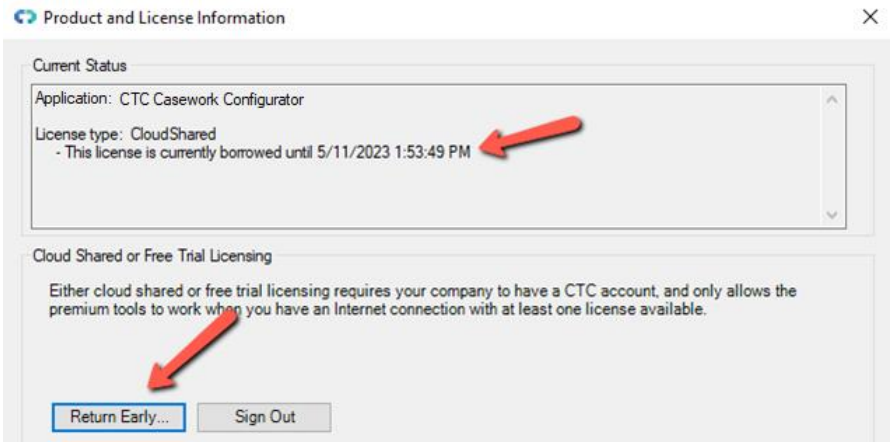


Confirm the date selection and click the *Borrow License* button. A success message should appear.

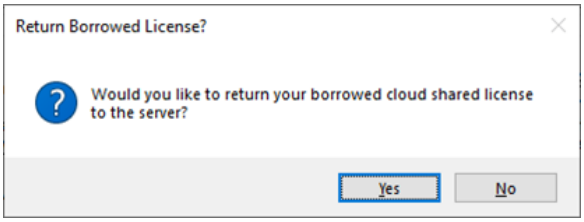


Returning a Borrowed Cloud Shared License Early

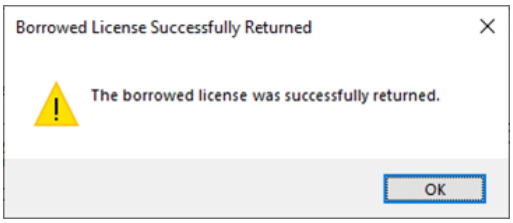
To return the license early, in the *Product and License Information* form, find the *Return Early…* button and click it.



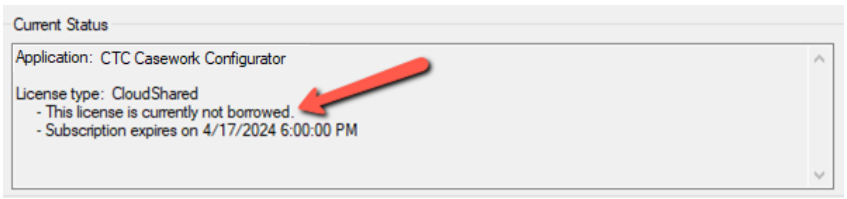
A prompt will appear confirming that the license should be returned.



Click the Yes button, then you should see:



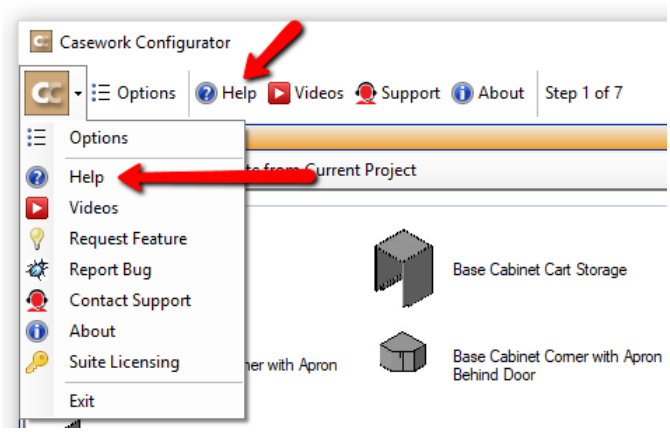
The license status should now show a ‘not borrowed’ message.



Common Toolbar and Menu Buttons

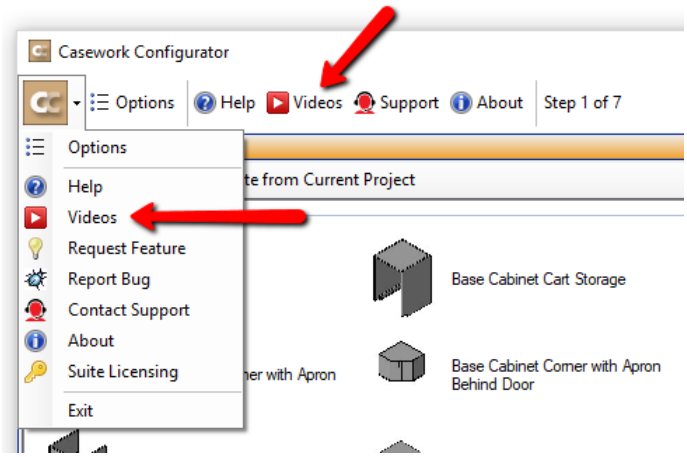
Getting Help

In the toolbar, clicking the “Help” button will display this user guide.



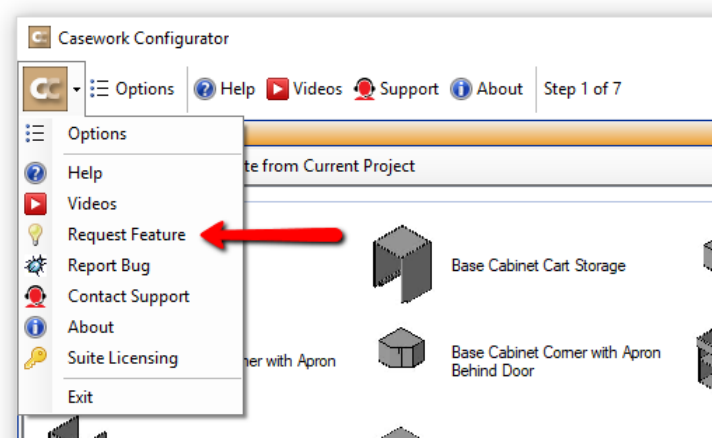
Getting More Help: Videos

An alternate source of help is to click on the Videos button, which will display a list of tool-specific videos in your web browser.



Submitting a Feature Request

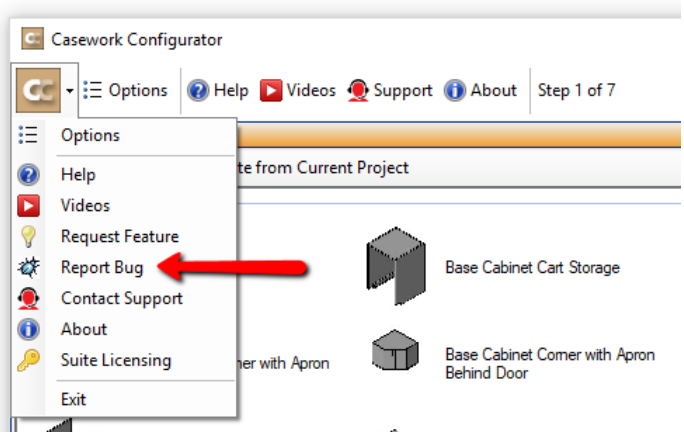
If you have an idea for enhancing a feature or would like to see a new feature added to the software, you can either use the “Request Feature” button on the About dialog (seen below) or can access that functionality using the “Request Feature” drop-down menu choice:



Selecting this option will open the Support page on the CTC web site, which allows you to add a request for a new feature by selecting the Wish List option.

Reporting a Bug

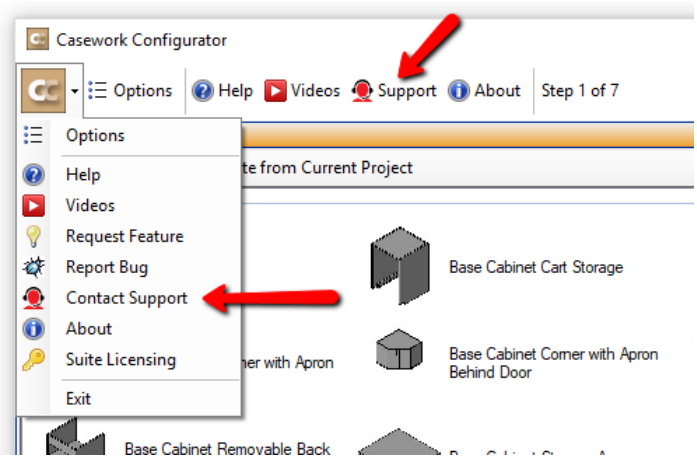
If you encounter what you feel is an issue or incorrect operation in the software, you can report this as a “bug” by either using the “Report Bug” button on the About dialog (seen below) or can access that functionality using the “Report Bug” drop-down menu choice:



Selecting this option will open the Support page on the CTC web site, which allows you to submit the information about the issue.

Contacting Technical Support

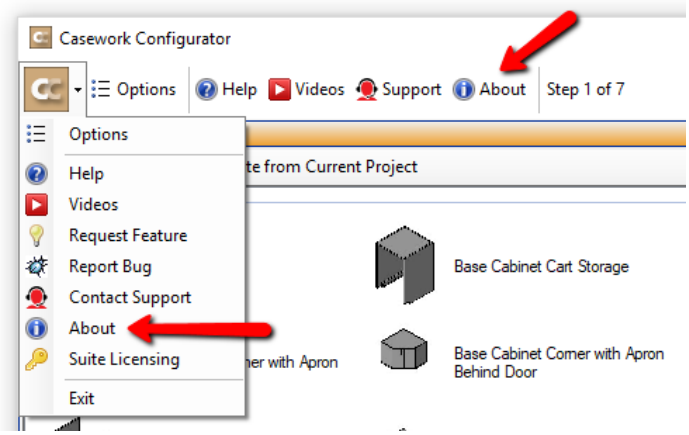
In the toolbar, clicking the “Support” button will open the Support page on the CTC web site. This button may be hidden by your system administrator.



Selecting this option will open the Support page on the CTC web site.

Getting Application Information

In the toolbar, clicking the “About” button will display a dialog which shows information about this tool.



This screen should look like this:

Suite Settings

The Suite Settings tool allows suite-level changes to be applied.

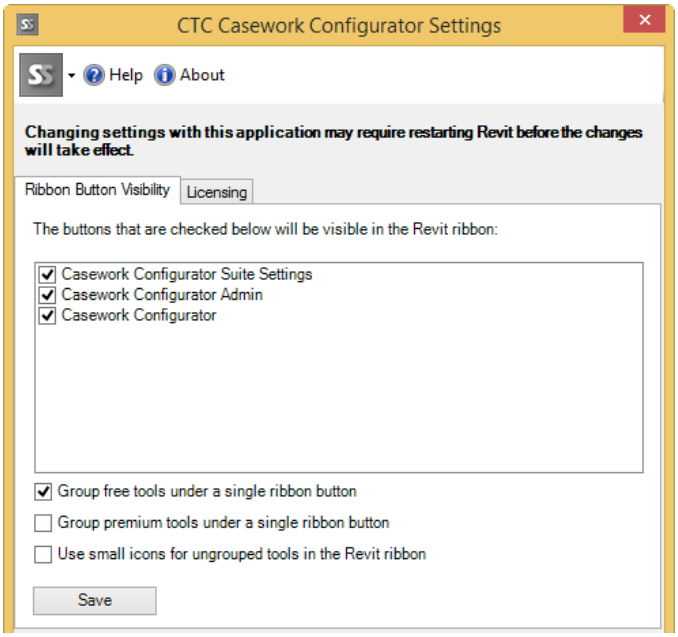
NOTE: You may need to restart Revit in order to see any changes made with this tool take effect.

NOTE: Your system administrator may disable some features of this application.

Starting Suite Settings

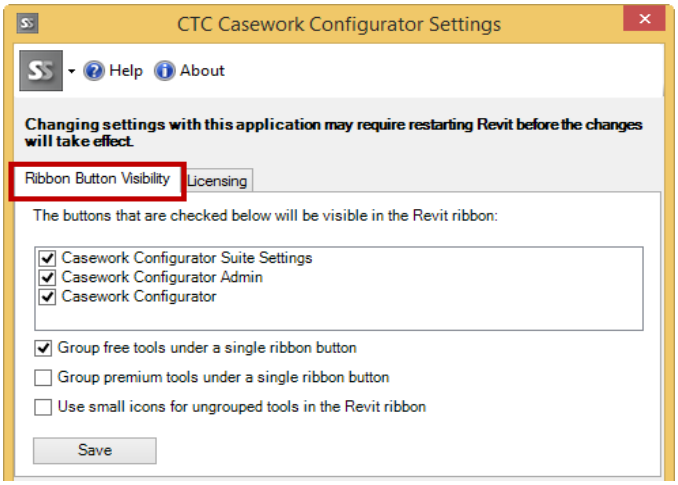
Click on the "CTC Software" tab in the ribbon and then click on the "Suite Settings" button.

This will launch the Casework Configurator Suite Settings:



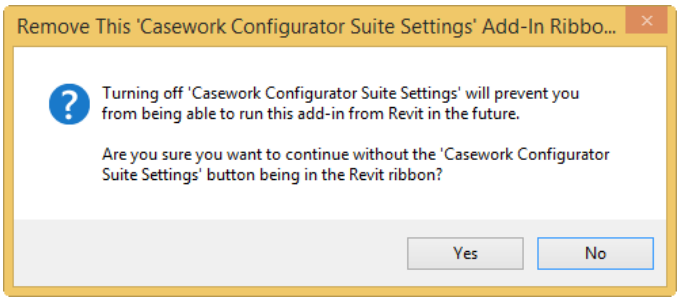
Controlling Which Ribbon Buttons are Visible and how they Appear

The first tab in the Suite Settings tool allows changing which ribbon buttons are available, if this feature has not been disabled by the system administrator. The *CTC Suites Installation and Configuration* document explains how ribbon button availability can be controlled more automatically using either configuration files or Active Directory security group definitions.



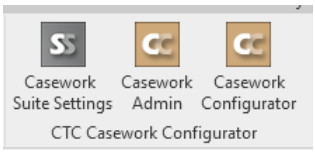
For any ribbon buttons that you don't want to have available, simply clear the checkmark by their name and then click the "Save" button.

Turning off the button for the application itself will show the following:



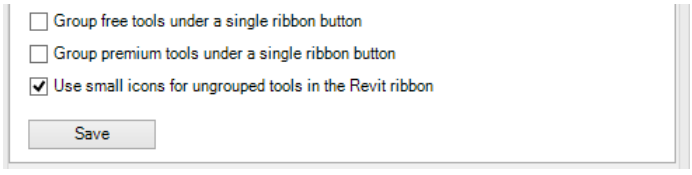
Selecting the grouping checkboxes near the bottom of the dialog will condense the tools into a dropdown button.

This is the default configuration when the tools are installed on a new computer:

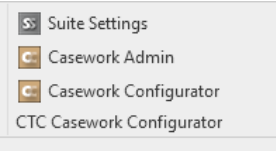


Note that if only one tool within a group is visible, the button for that tool will be placed directly on the panel.

Selecting the "Use small icons for ungrouped tools in the Revit ribbon" checkbox can save some ribbon space for ungrouped tools. For example, these settings…

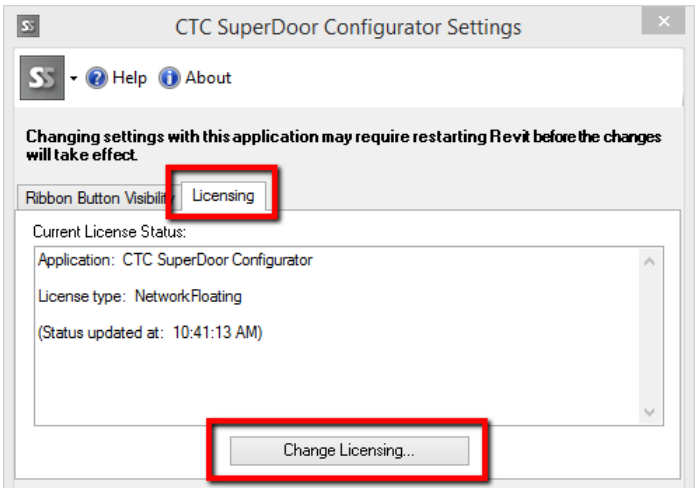


…results in this.

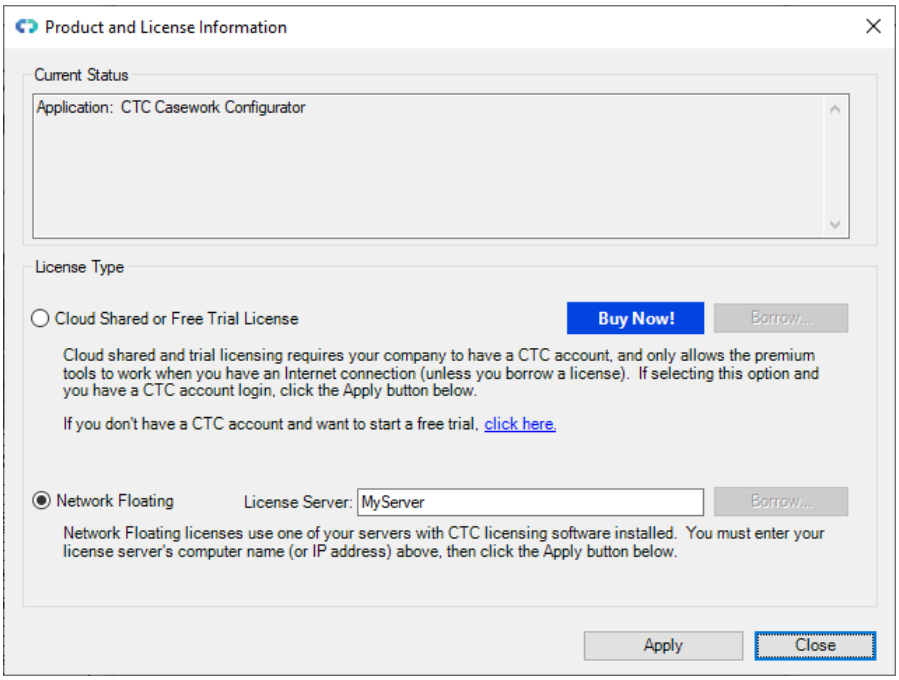

Suite Settings
Casework Admin
Casework Configurator
CTC Casework Configurator

Seeing and Changing License Status

The second tab allows seeing the current license status and changing the licensing:



The top portion of this screen shows how the licensing is currently configured for this suite. Clicking the "Change Licensing…" button will show the dialog that allows changing how the suite is licensed:



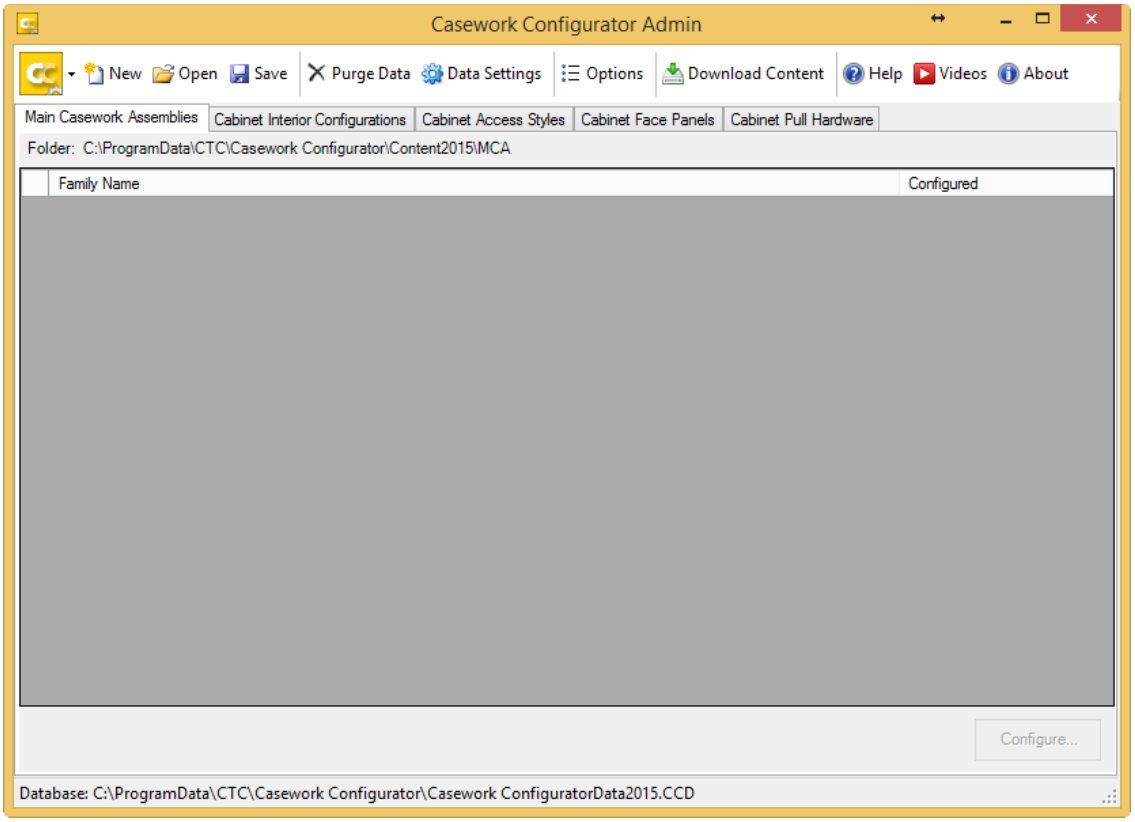
For more information on how the *Product and License Information* dialog works, please review the "License Activation and Management" section of this document, above.

Casework Configurator Admin

The Casework Configurator Admin tool is used to configure casework family files for use by the Casework Configurator tool.

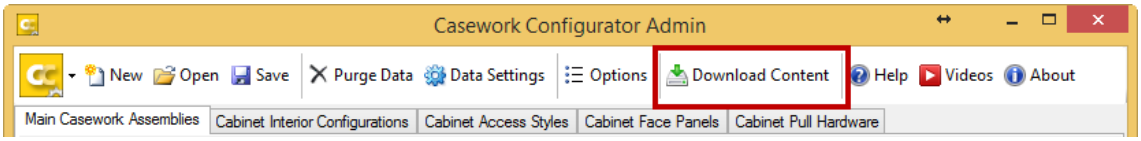
Starting Casework Configurator Admin

On the Revit ribbon, click on the “Casework Admin” button.

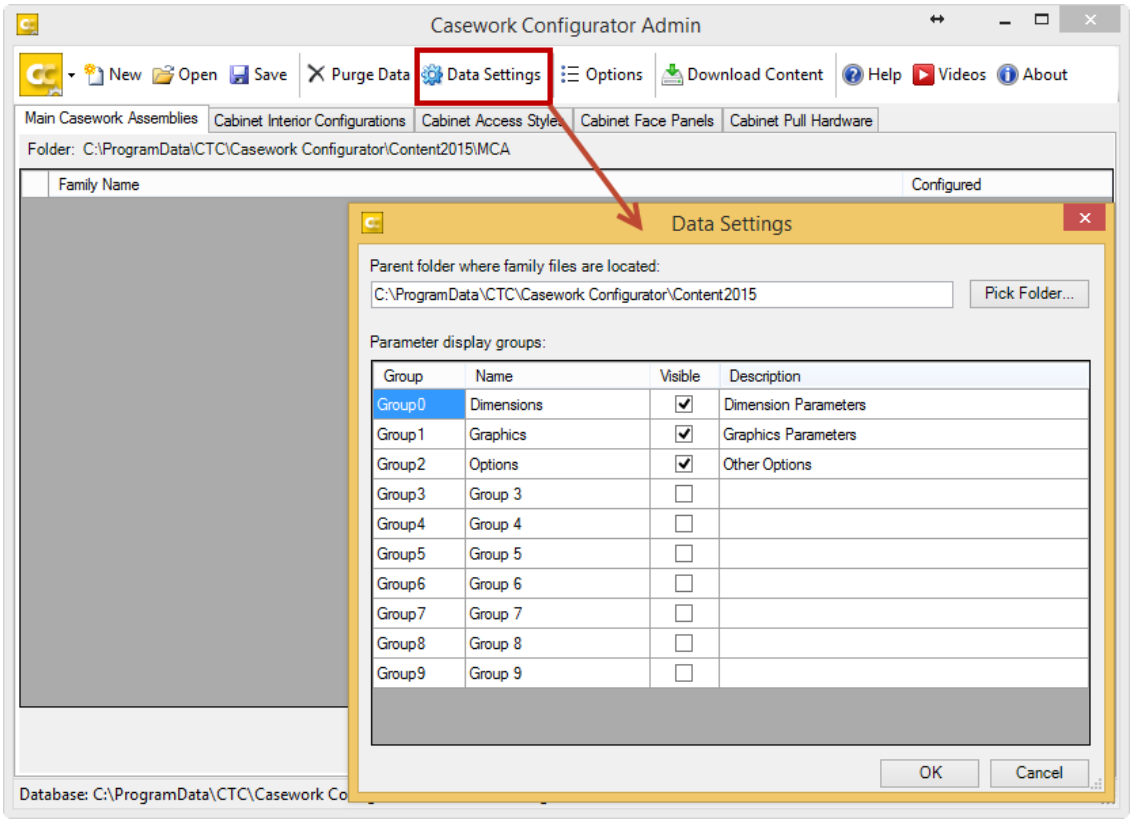


Basic Database Setup

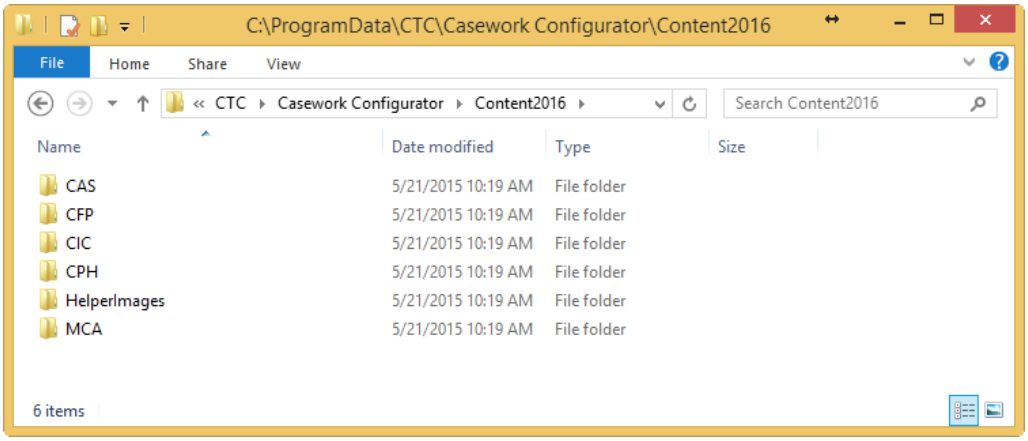
The default install does not include the Casework family content. Once the Casework Configurator software is licensed, the "Download Casework Content" button can be used to download the latest version of the family files.



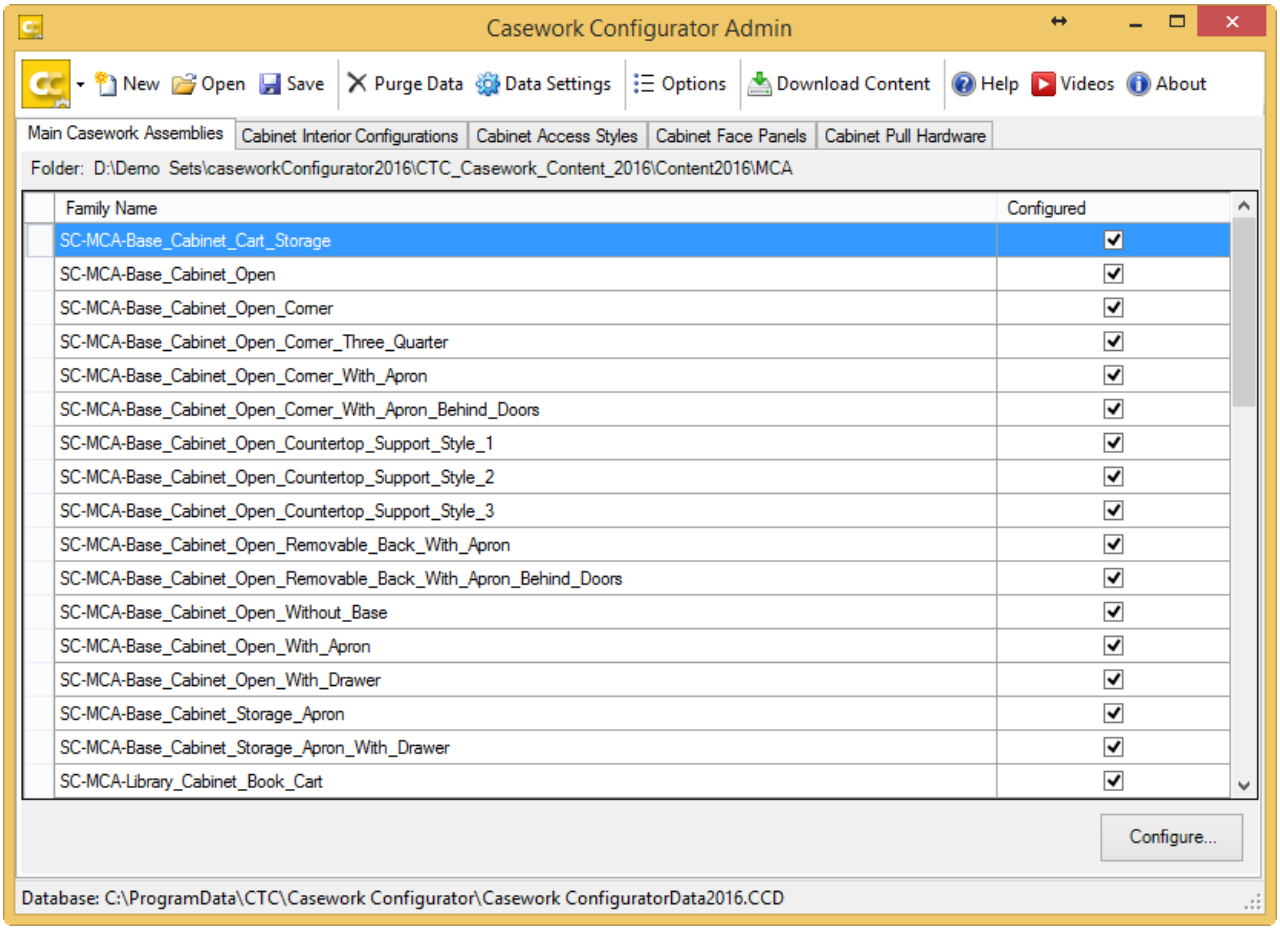
The family files, once downloaded, can be stored locally or on a network share. Click the "Data Settings" button and then "Pick Folder…" to select the folder containing the Casework Configurator content.



The content folder can be placed in any location accessible to all users; however the subfolder structure must remain unmodified.



When the content has completed downloading, copy it into the specified location. Each piece of content will become visible in the Casework Configurator Admin window. To initialize the new content (if it was not present before running the Admin), close and reopen the Casework Configurator Admin.



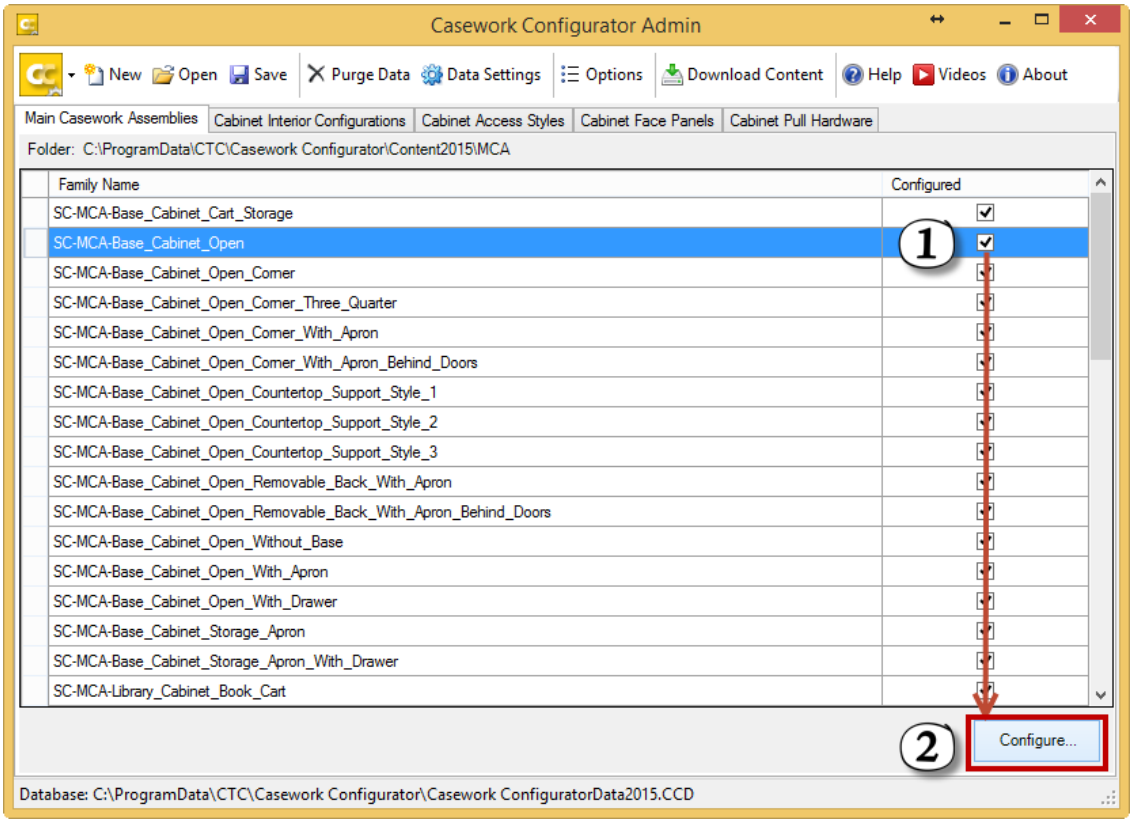
After the content has been mapped, the basic configuration of the database is complete.

Configuring the Content

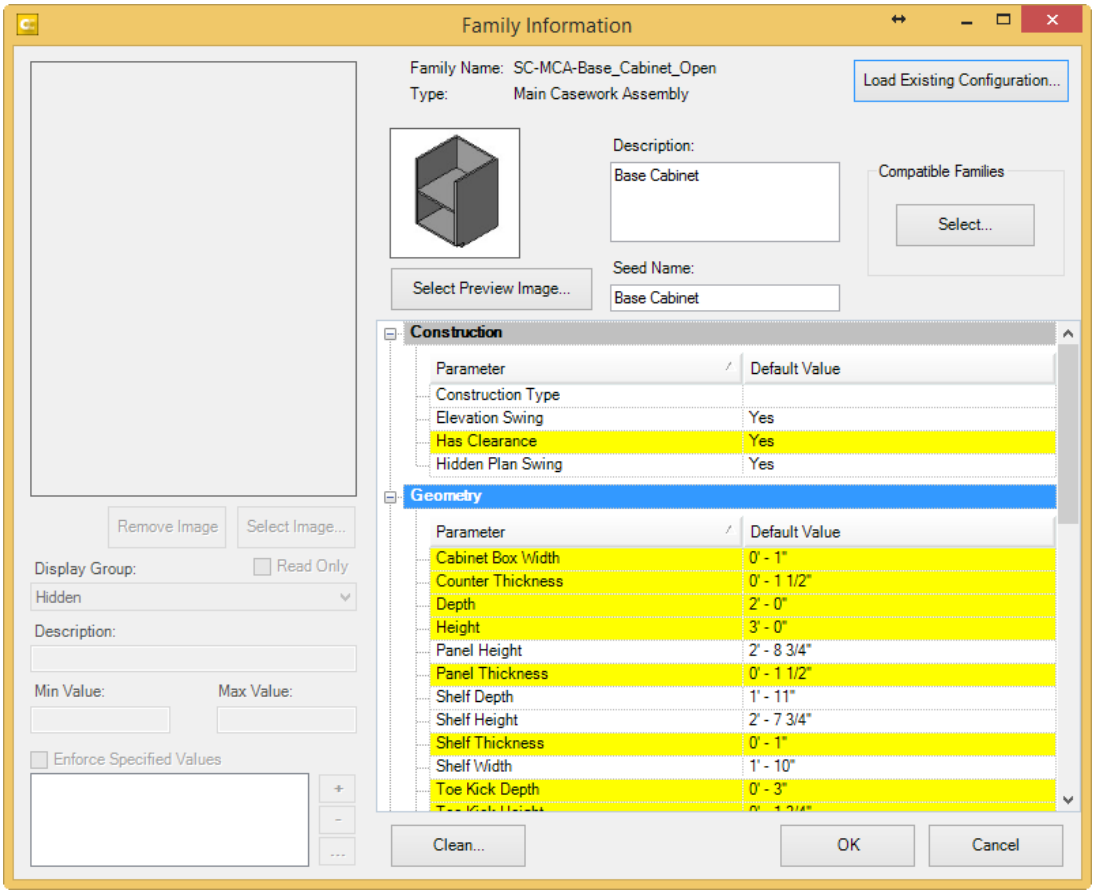
A starter configuration database is provided. The starter configuration can be used and modified or, if a blank configuration is desired, a new database can be created. To create a new database, open the Casework Configurator Admin tool, click New and specify the required values. To modify a configuration:

1. Locate and highlight the desired piece of content
2. Press “Configure…” to open the configuration window.

In this example the “SC-MCA-Base_Cabinet_Open” will be configured.

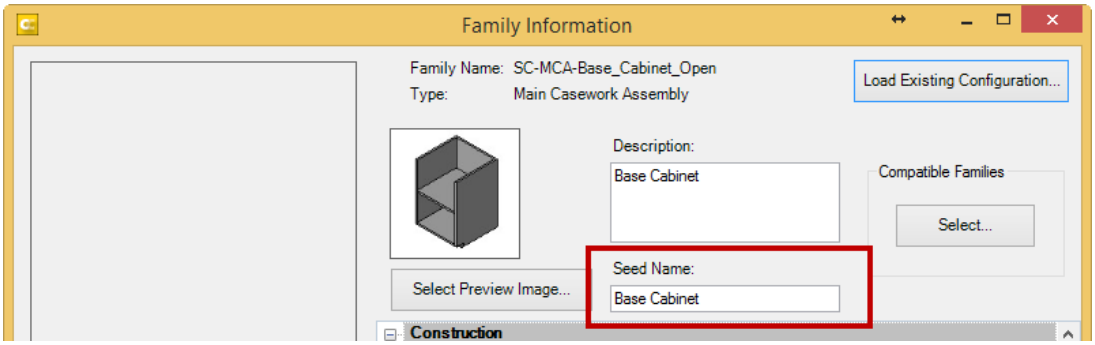


The “Family Information” dialog is used to configure each piece of content in the database.



Changing Seed Names

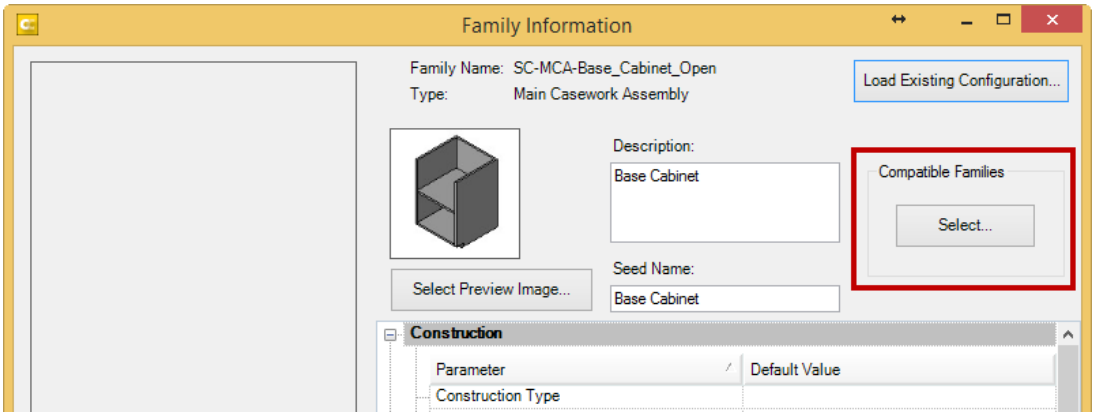
The Seed Name field is used for the naming of families and types when they are created in Casework Configurator. If the default seed names do not match existing company standards, they can be changed by modifying this field for each piece of content.



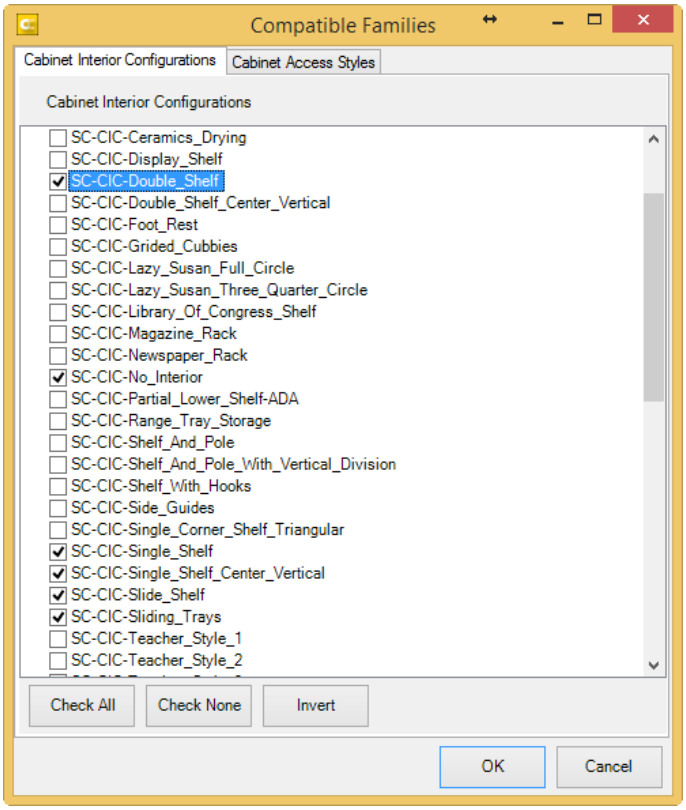
To change, enter the desired value in the text box and click the “OK” button.

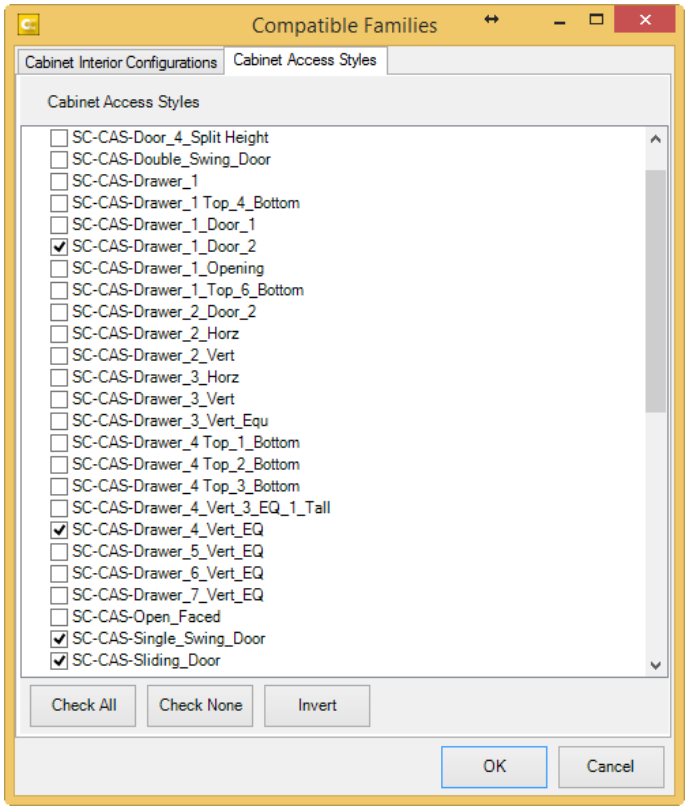
Configuring Compatible Assemblies

Each assembly family has been configured with a list of appropriate Interior and Access Style configurations so that invalid selections cannot be made. For example it would be inappropriate to select an Access Style configuration when with an open library cabinet. To configure which components can be used with each assembly, open the assembly and click the Compatible Families button.



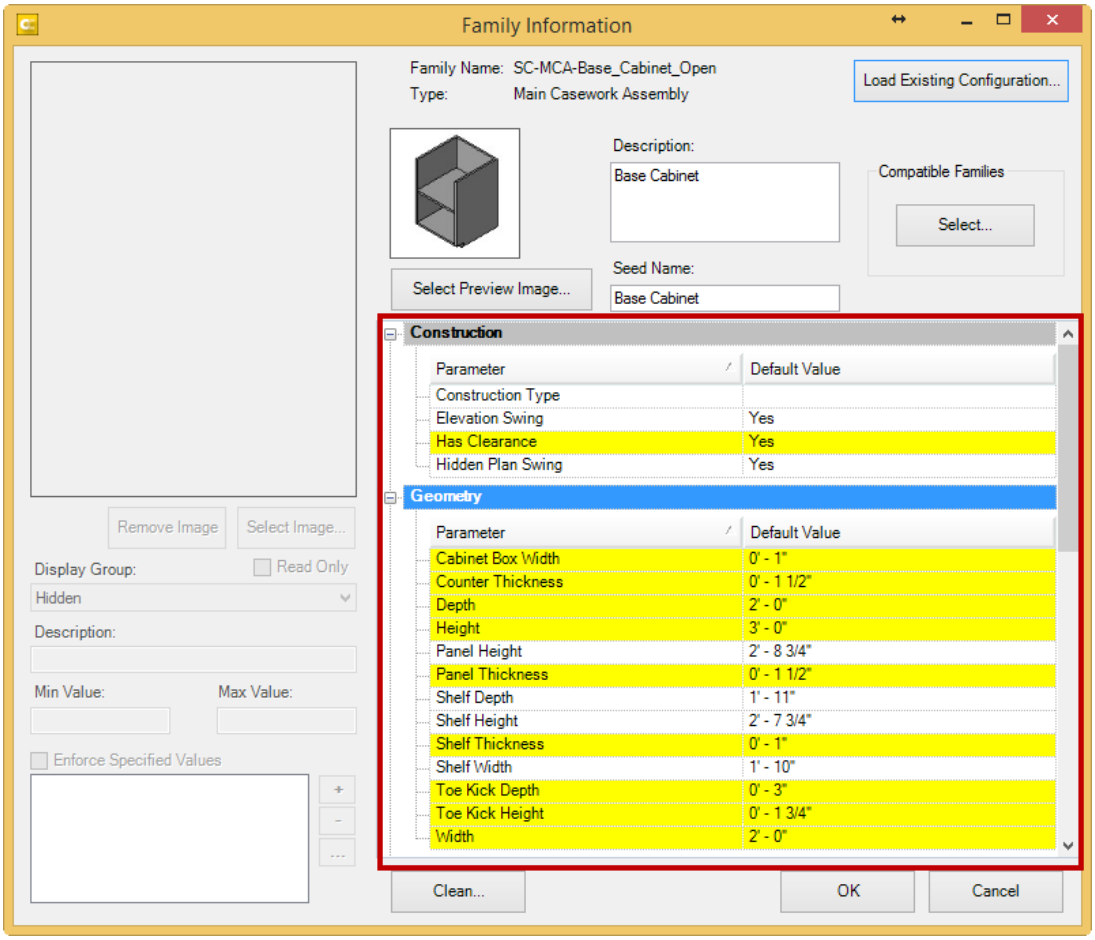
The "Compatible Families" window is used to select each panel or frame that can be used with the assembly. Select the appropriate interior configurations, access styles and pull hardware. To accept the selections, click the "Ok" button.



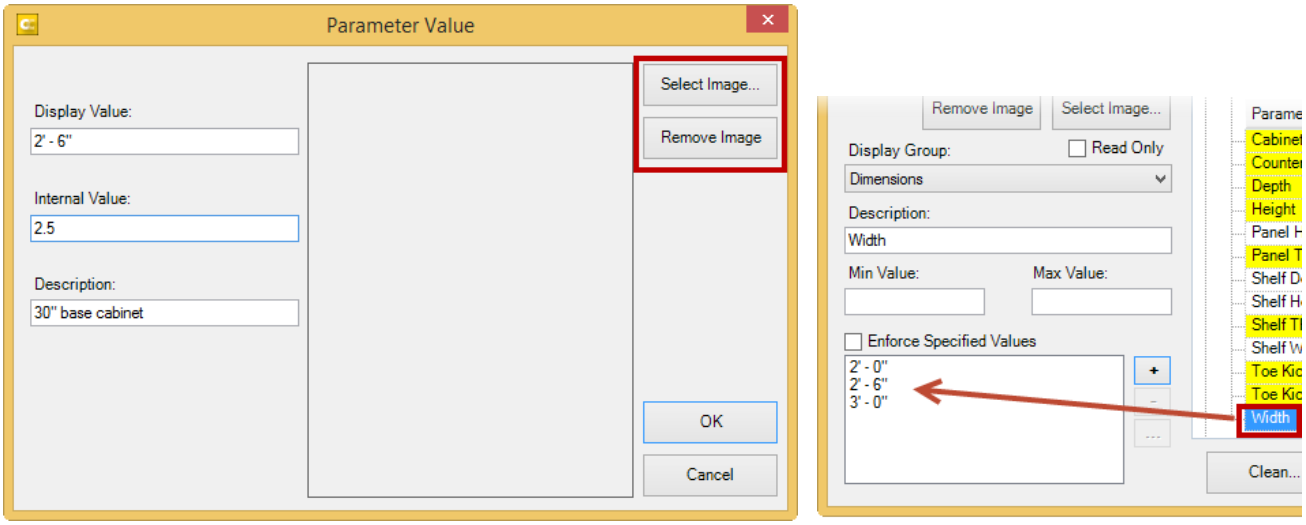


Configuring Parameters

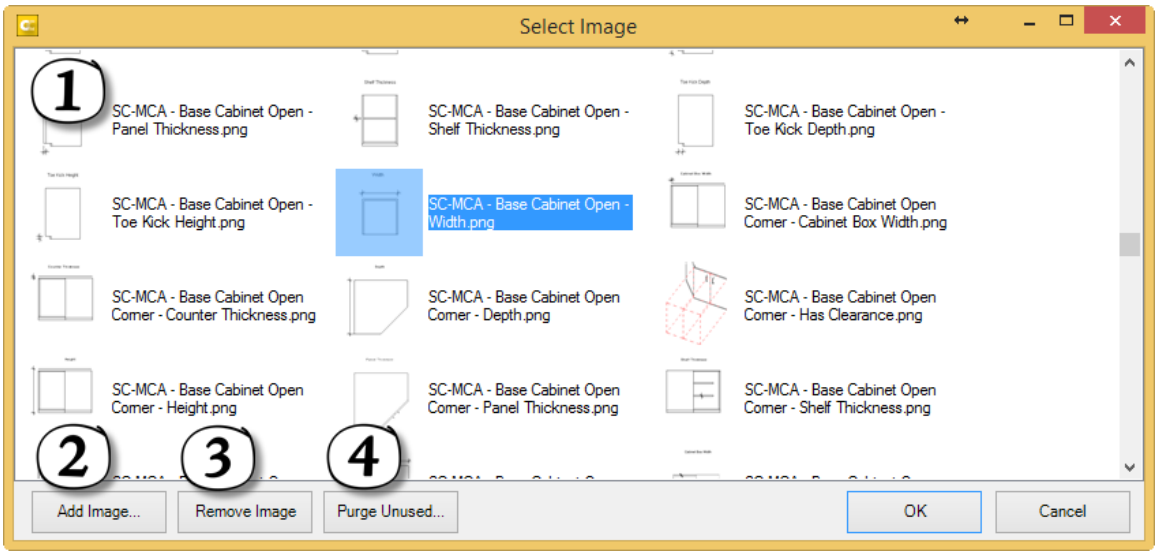
The default content for Casework Configurator has already been configured in the database. However, changes can be made to the default configurations using the “Family Information” dialog. To modify parameter configurations, open the desired family. The list of parameters for that family will be displayed in the lower right portion of the “Family Information” dialog.



Parameters that have been configured already will be highlighted in yellow. Parameters that have not been configured will display in white. Select the parameter to configure or change. Once selected, there are several functions on the left side of the dialog to control how the parameter will function.



In this example, we have set the width parameter to 3 possible values, 2', 2 1/2' and 3'. Set the Display Value and Description as desired. The Internal Value field will drive the actual width of the cabinet and should be specified as the decimal equivalent in feet (ie. 2'-6" = 2.5).

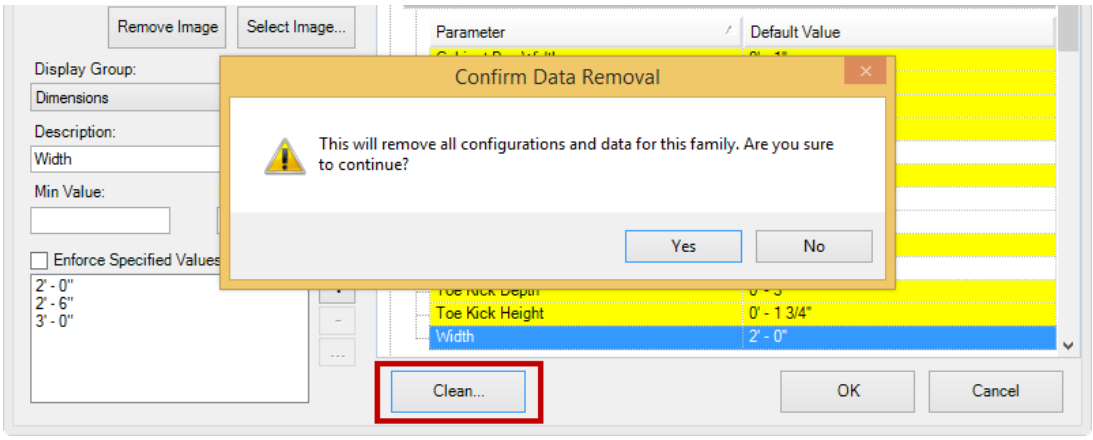


If desired, click Select Image… to choose a descriptive graphic for the parameter. If no image is chosen, the default will display for all the values of this parameter. If this is a new database being configured for the first time, images will be not be specified for each casework assembly and its parameters. This step is helpful but not required.

1. Available images
2. Add an image to the list of available images. Allowed types are .bmp, .png, .jpeg, .wmf and .gif
3. Remove the selected image from the list
4. Remove unused images from the database

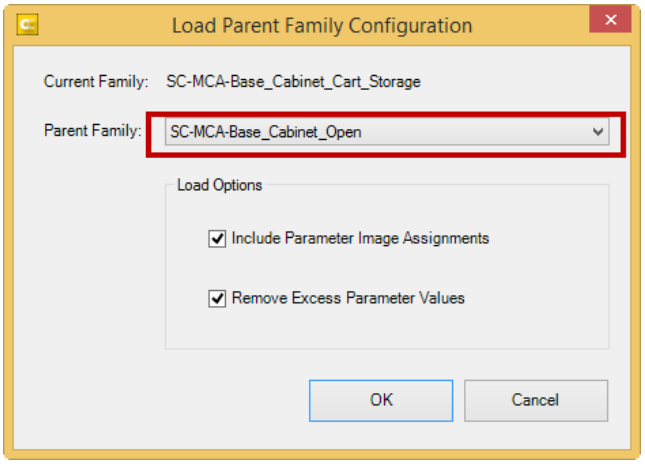
When finished configuring this family, choose OK.

To completely remove this configuration from the database, click Clean…



Note: this will not remove the source families from the file system.

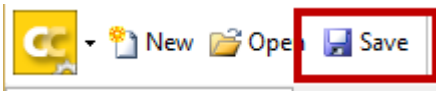
To load settings from another configuration in this database, click Load Existing Configuration… from the Family Information window. This can save time when configuring similar casework assemblies.



This will load the parameter values and image assignments from the parent family. Select desired parent and options then choose OK.

To commit the configuration to the database, click OK in the Family Information window.

After all of the desired families have been configured, save the changes to the database to make them available to the Casework Configurator.

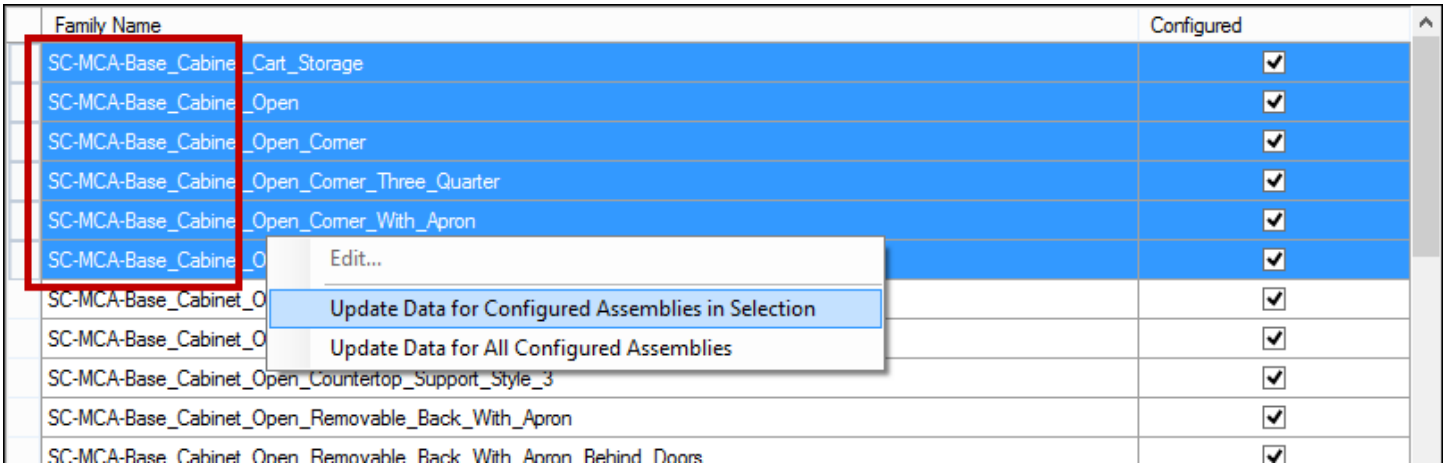


Content updates

If changes or updates have been made to the casework content families, it may be necessary to reinitialize the content in the database.

To update just one configured assembly, simply double click it in the list. For multiple assemblies, use the right-click context menu to save time:

Hold the CTRL or SHIFT key while left clicking to select multiple items in the list then right click to update the selected content in the database.



Right click anywhere in the list and choose Update Data for all of the Configured Assemblies (no selection is necessary). This will process all of the configured assemblies in the database.

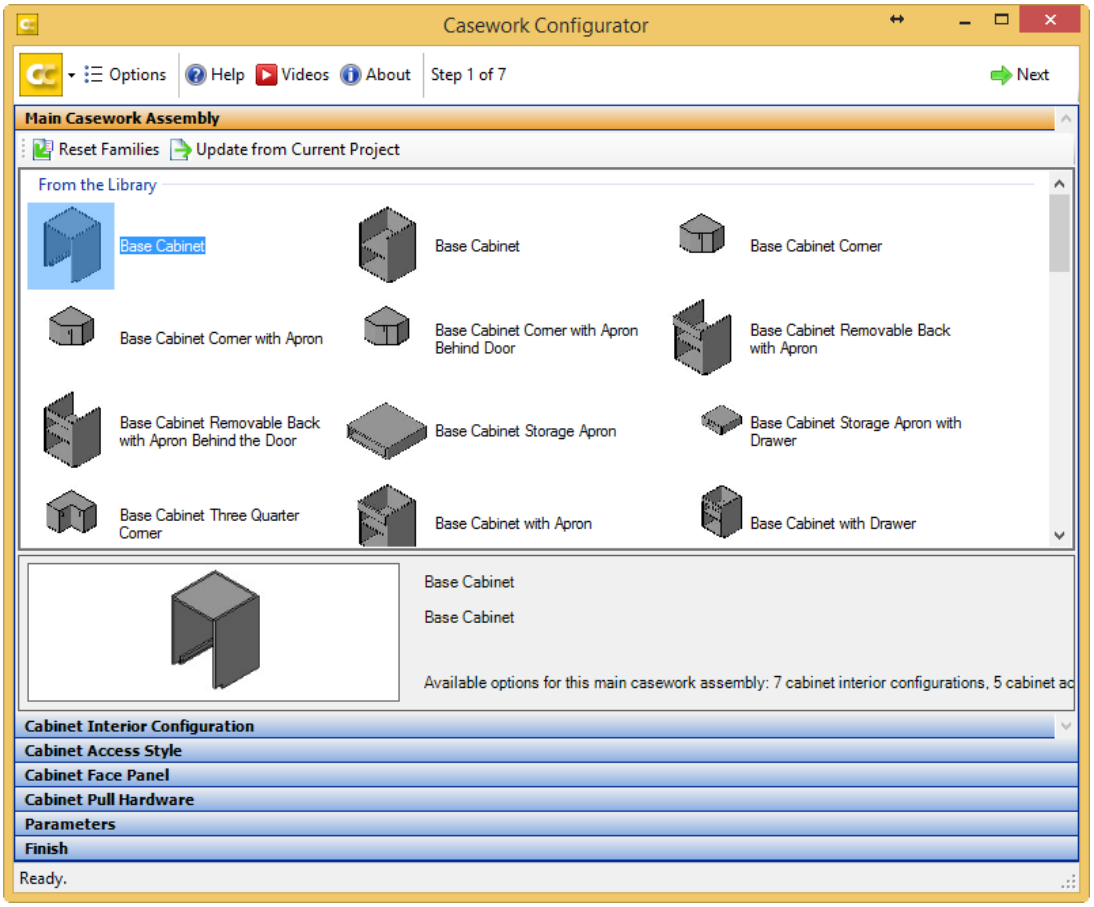
Casework Configurator

Introduction

The Casework Configurator add-in allows configuring a new casework family and loading it into the current project by using families that have been configured by an administrator using the Casework Configurator Admin tool. The interface guides the user through a series of steps, much like a wizard, but all within a single window. Generally, it is only necessary to configure a family one time for a project. Once loaded into a project, additional family instances can be placed using the standard Revit methods.

Opening Casework Configurator

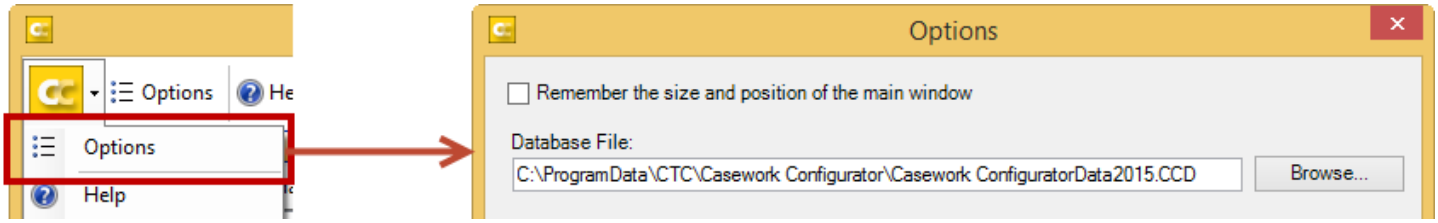
On the Revit ribbon, click on the “Casework Configurator” button.



The Casework Configurator’s interface guides users through the configuration process in steps.

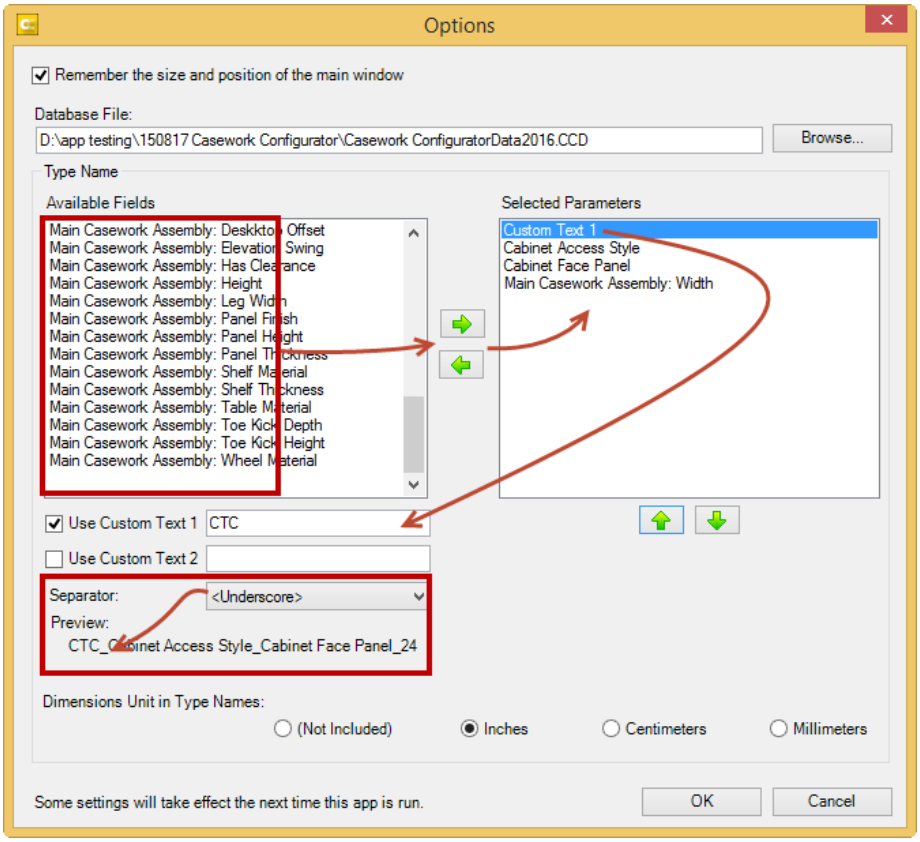
Building Casework

The first step to begin building and using the Casework Configurator is to set the path to the casework database. From the Casework Configurator window, click Options.



In the options, specify the path to the database (the default database file is shown above). To initialize a newly specified database, the Casework Configurator should be closed and re-launched after changing the database path.

Parametric type naming can also be configured here. The Configurator allows selecting and ordering of the family parameters whose values will be used for type naming. Simply double-click a parameter to instantly move one parameter from one pane to another. To move several selections, left-click each while holding the SHIFT key and use the left/right arrows to move them between panes. The right pane contains the list of parameters that will be used. The up/down arrows can be used to re-order the list.



Two custom text fields are available as well as optional separators between fields. An example preview of the resulting name is provided below the naming options.

Specify the unit of measurement to be used for length parameters (if selected) in the type names.

Choose OK to apply the settings. Changes to these options do not affect previously configured assemblies.

To create and use casework in a project, just follow these steps:

1. Double-click on the desired cabinet style (Main Casework Assembly)
2. Choose one of the available interior configurations. These may include shelves, racks, trays, etc. depending upon how it was set up in the admin tool. If an empty interior is desired and available, select No Interior.
3. Specify a Cabinet Access Style. Selections here determine placement and quantities of doors, drawers, openings and more. As with the Interior Configuration, if open faced casework is desired, select it accordingly.
4. Select a Face Panel. The panel style is applied to the Face Option.
5. Pull Hardware can be specified here if available. If it not configured for or does not apply to the casework type, the configurator will skip to the next step.
6. To jump back to a previous step, simply click on the label bar of that step in the wizard at any time.
7. Choose appropriate parameter values for the family instances. Depending upon the database set up, some values may already be provided. The subsections of this step contain parameter groups (as set in the database), some of which are editable such as Dimensions, Graphics (show/hide clearances, swings, etc.) and other optional groups. Again, the available parameters here are defined in the Admin database set up.
8. Finalize the configuration during the Finish step. If creating a different size or combination of a previously inserted casework assembly, the configurator will add it as a new type to the family. Also, choose how the Configurator will handle the new configuration; load into the current project or save to a file (or both). Click Finish to place and/or complete the configuration steps.
9. To create more instances of casework in the project, simply drag the desired family type from Revit's project browser, use the Component command or any other common method.

Casework Configurator Content Anatomy

The casework content is designed specifically to be built using the Configurator. The casework content can be used without the Configurator if desired. The basic structure of the components that make up an assembly is described below:

1. MCA – Main Casework Assemblies: All components are nested into this family
2. CIC – Cabinet Interior Configurations: these components are primarily shelves but include other elements that are found inside cabinets like poles, rods and hooks.
3. CAS – Cabinet Access Styles: Door and drawer configurations
4. CFP – Cabinet Face Panels: Various types of panel treatments such as edge and inset styles.
5. CPH – Cabinet Pull Hardware: Various styles of handles and pulls

The nested family properties are driven by various parameter values in the main assemblies and by the Configurator when creating assemblies. Use caution when customizing the families directly; ensure that essential parameters and values remain.