

CTC Casework ConfiguratorTM User Guide

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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.

Product and License Information	×
Current Status	
Application: CTC Casework Configurator	^
License type: Unknown	
Cloud Shared or Free Trial Licensing Either cloud shared or free trial licensing requires your company to have a CTC account, and only allows the premium tools to work when you have an Internet connection with at least one license available.	
If your organization does not have a CTC account, but you want to create an account and begin a trial, click he	are.
You must click the OK button below to accept and start using cloud shared or free trial licensing.	
Borrow Sign Out	
ОК Са	ancel

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:

📧 Sign In	_		×
A SYMETRI COMPANY	R	Ε	
Welcome			
Sign in with your CTC account			
Email address			ר ו
Continue			

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:

Product and License Information	:
Current Status	
Application: CTC Casework Configurator License type: CloudShared - Logged in user: David - This license is currently not borrowed. - Subscription expires on 6/1/2024 6:00:00 PM	~
Cloud Shared or Free Trial Licensing Either cloud shared or free trial licensing requires your company to have a CTC account, and on premium tools to work when you have an Internet connection with at least one license available. Borrow Sign Out	ly allows the
	Close

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.

C Product and License Information	×
Current Status	
Application: CTC Casework Configurator	-
License type: CloudShared - Logged in user: David - This license is currently not borrowed. - Subscription expires on 6/1/2024 6:00:00 PM	,
Cloud Shared or Free Trial Licensing Either cloud shared or free trial licensing requires your company to have a CTC account, and only allows the premium tools to work when you have an Internet connection with at least one license available. Borrow Sign Out	
Close	

The date selector should appear:

C Borrow a Clo	oud Lic	ense							×
		СТС	Casev	vork Co	nfigura	ator			
Borrowing a clou long as you have	ud shar e an Int	ed lice ernet c	nse is onneo	NOT i	require	ed to u	se the	software, a	15
Borrowing a clou software even w away a shared li manually returne	Borrowing a cloud shared license allows you to continue using this software even when you don't have an Internet connection, but it takes away a shared license available to everyone else until it expires or is manually returned early by you.								
In the event you recover a borrow	r compo ved lice	uteris ense, s	damag o only	ged, an v borrov	Admir v for th	nistrato ne mini	or CAN imum ti	NOT ime neede	d.
	CI	noose	within	the val	id date	e range	е		
IT	nursday	r, April	27, 20	023 - F	riday,	May 2	6, 2023	5	
	4		N	1ay 202	3		-		
	Sun	Mon	Tue	Wed	Thu	/ri	Sat		
	30 7	8	9	10	11	12	13		
	14	15	16	17	18	19	20		
	21	22	23	24	25	26			
		C		Today:	4/26/	2023			
	Borrow	v this li Thu	icense Irsday	e until t v, May i	his saı 11, 202	me tim 23	e on: ┥	-	
To borrow a lice click the Borrow	nse, cli Licens	ick on e butto	a licer on.	nse ret	urn dat	te in th	e caler	ndar and ti	nen
	Borro	ow Lice	ense		C	ancel]	

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

×		
		×
A license has been successfully borrowed until Thursday, May 11, 2023	license has been successfully borrowed until Thursday, May 1	1, 2023
ОК		OK

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.

cense type: CloudShared - This license is currently borrowed until 5/11/2023 1:53:49 PM	Î
and Shared as Ease Tetal Linearche	v
Either cloud shared or free trial licensing requires your company to have a CTC accoupremium tools to work when you have an Internet connection with at least one license	unt, and only allows the available.

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.

C:	Casework Configurator			/		Ī
C	 ▼ ⋮Ξ Options Q He 	lp 下 Videos	👲 Support	(i) About	Step 1 of 7	
Ξ	Options					
2	Help	te from Currer	nt Project			
	Videos					_
9	Request Feature		\sim			
<i>4</i>	Report Bug		and a state	Base Cabine	et Cart Storage	
9	Contact Support 👍					
0	About		\bigcirc			
	Suite Licensing	ner with Apron		Base Cabine Behind Door	et Corner with Apron r	
	Exit					
	Base Cabinet Rei	movable Back			. ~ .	

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:

55	CTC Casework Configurator Settings				
SS - 🕡 Help 🚺	About				
Changing settings w will take effect.	vith this application may require restarting Revit before the changes				
Ribbon Button Visibility	Licensing				
The buttons that are c	hecked below will be visible in the Revit ribbon:				
 ✓ Casework Config ✓ Casework Config ✓ Casework Config 	urator Suite Settings urator Admin urator				
Group free tools u	nder a single ribbon button				
Group premium to	ols under a single ribbon button				
Use small icons for ungrouped tools in the Revit ribbon					
Save					

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...

	Group free tools under a single ribbon button
l	Group premium tools under a single ribbon button
l	✓ Use small icons for ungrouped tools in the Revit ribbon
	Save

...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:

s: C	TC SuperDoor Configurator Settings	×
SS - 😢 Help 🕦 /	About	
Changing settings wit will take effect Ribbon Button Visibilit	h this application may require restarting Revit before the ch Licensing	langes
Application: CTC Supe License type: Network (Status updated at: 10	rDoor Configurator Floating :41:13 AM)	~
	Change 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:

C Product and License Information	×
Current Status	
Application: CTC Casework Configurator	
	/
License Type	
O Cloud Shared or Free Trial License Buy Now! Borrow	
Cloud shared and trial licensing requires your company to have a CTC account, and only allows the premium tools to work when you have an Internet connection (unless you borrow a license). If selecting this option and you have a CTC account login, click the Apply button below.	
If you don't have a CTC account and want to start a free trial, click here,	
Network Floating License Server: MyServer Dour Server Dour Server Dour Server Dour Server's with CTC licensing software installed. You must enter your license server's computer name (or IP address) above, then click the Apply button below.	
Apply Close	

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.



Casework Configurator Admin	+	- 🗆 🗙
😋 - 🖺 New 🗃 Open 🖼 Save 🗙 Purge Data 🎡 Data Settings 🗄 Options 🚵 Download Content 🔞 Help	Videos 🕨	🕦 About
Main Casework Assemblies Cabinet Interior Configurations Cabinet Access Styles Cabinet Face Panels Cabinet Pull Hardware		
Folder: C:\ProgramData\CTC\Casework Configurator\Content2015\MCA		
Family Name C	Configured	
		Configure
Database: C:\ProgramData\CTC\Casework Configurator\Casework ConfiguratorData2015.CCD		.::

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.

Casework Configurator Admin						+		×
😋 - 🐴 New 🚔 Ope	n 🛃 Save 🗙 Purge Data	🛛 🎡 Data Settings	E Options	📥 Download Content	🕡 Help	Videos	🕕 Abou	t
Main Casework Assemblies	Cabinet Interior Configurations	Cabinet Access Style	es Cabinet Fa	ce Panels Cabinet Pull Hard	ware			

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.

C,	Ca	sework Configurator A	dmin		↔	-		
😋 🗣 🖺 New 📄 Open 🚽 Save 🗙 Purge Data 🎡 Data Settings 🗄 Options 📩 Download Content 🔞 Help 🕨 Videos 🕦 About								
Main Casework Assemblies Cabinet Interior Configurations Cabinet Access Styles Cabinet Face Panels Cabinet Pull Hardware								
Folder: C:\ProgramData\CTC\Casework Configu	rator\Content20)15\MCA						
Family Name					Configure	d		
	C	Å	Data	Settings			×	
	Parent folder	where family files are locate	d:					
	C:\Program[Data\CTC\Casework Configura	tor\Conter	nt2015		Pick F	older	
	Parameter d	isplay groups:						
	Group	Name	Visible	Description				
	Group0	Dimensions	•	Dimension Parameters				
	Group1	Graphics	•	Graphics Parameters				
	Group2	Options	✓	Other Options				
	Group3	Group 3						
	Group4	Group 4						
	Group5	Group 5						
	Group6	Group 6						
	Group7	Group 7						
	Group8	Group 8						
	Group9	Group 9						
Database: C:\ProgramData\CTC\Casework Co					ОК	C	ancel	

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

🕕 💽 🕕 = C:\	ProgramData\CTC\Casework C	Configurator\Cor	ntent2016	+ -	×
File Home Share \	/iew				~ ?
🔄 🏵 🔻 🕇 🌗 « CTC 🕨	Casework Configurator → Content20	016 → 🗸 🤇	🖒 Search Co	ontent2016	Q,
Name	Date modified	Туре	Size		
🔰 CAS	5/21/2015 10:19 AM	File folder			
📕 CFP	5/21/2015 10:19 AM	File folder			
\mu CIC	5/21/2015 10:19 AM	File folder			
퉬 СРН	5/21/2015 10:19 AM	File folder			
퉬 Helperlmages	5/21/2015 10:19 AM	File folder			
JA MCA	5/21/2015 10:19 AM	File folder			
6 items					:== 🖿

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.

Casework Configurator Admin	↔ -	- 🗆 ×	
💽 👻 New 🖻 Open 🚽 Save 🗙 Purge Data 🎡 Data Settings 🗄 Options 📥 Download Content 🔞 H	elp 下 Videos 🌘	🕽 About	
Main Casework Assemblies Cabinet Interior Configurations Cabinet Access Styles Cabinet Face Panels Cabinet Pull Hardware			
Folder: D:\Demo Sets\caseworkConfigurator2016\CTC_Casework_Content_2016\Content2016\MCA			
Family Name	Configured		^
SC-MCA-Base_Cabinet_Cart_Storage	✓		
SC-MCA-Base_Cabinet_Open	✓		
SC-MCA-Base_Cabinet_Open_Comer	 ✓ 		
SC-MCA-Base_Cabinet_Open_Comer_Three_Quarter	✓		
SC-MCA-Base_Cabinet_Open_Comer_With_Apron	✓		
SC-MCA-Base_Cabinet_Open_Comer_With_Apron_Behind_Doors	✓		
SC-MCA-Base_Cabinet_Open_Countertop_Support_Style_1	✓		
SC-MCA-Base_Cabinet_Open_Countertop_Support_Style_2	✓		
SC-MCA-Base_Cabinet_Open_Countertop_Support_Style_3	✓		
SC-MCA-Base_Cabinet_Open_Removable_Back_With_Apron	-		
SC-MCA-Base_Cabinet_Open_Removable_Back_With_Apron_Behind_Doors			
SC-MCA-Base_Cabinet_Open_Without_Base	✓		
SC-MCA-Base_Cabinet_Open_With_Apron	-		
SC-MCA-Base_Cabinet_Open_With_Drawer	~		
SC-MCA-Base_Cabinet_Storage_Apron	✓		
SC-MCA-Base_Cabinet_Storage_Apron_With_Drawer	~		
SC-MCA-Library_Cabinet_Book_Cart	•		~
	C	Configure	
Database: C:\ProgramData\CTC\Casework Configurator\Casework ConfiguratorData2016.CCD			:

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.

Casework Configurato	or Admin 🛛 😁 🗕 🗆 🗙
😋 🗣 🖄 New 🗃 Open 🛃 Save 🗙 Purge Data 🎆 Data Settings 🗄 Optio	ns 📩 Download Content 🔞 Help 🔁 Videos 🕦 About
Main Casework Assemblies Cabinet Interior Configurations Cabinet Access Styles Cabine	t Face Panels Cabinet Pull Hardware
Folder: C:\ProgramData\CTC\Casework Configurator\Content2015\MCA	
Family Name	Configured ^
SC-MCA-Base_Cabinet_Cart_Storage	
SC-MCA-Base_Cabinet_Open	(1) 🖉
SC-MCA-Base_Cabinet_Open_Comer	
SC-MCA-Base_Cabinet_Open_Comer_Three_Quarter	.
SC-MCA-Base_Cabinet_Open_Comer_With_Apron	.
SC-MCA-Base_Cabinet_Open_Comer_With_Apron_Behind_Doors	• • • • • • • • • • • • • • • • • • •
SC-MCA-Base_Cabinet_Open_Countertop_Support_Style_1	
SC-MCA-Base_Cabinet_Open_Countertop_Support_Style_2	
SC-MCA-Base_Cabinet_Open_Countertop_Support_Style_3	
SC-MCA-Base_Cabinet_Open_Removable_Back_With_Apron	
SC-MCA-Base_Cabinet_Open_Removable_Back_With_Apron_Behind_Doors	
SC-MCA-Base_Cabinet_Open_Without_Base	
SC-MCA-Base_Cabinet_Open_With_Apron	
SC-MCA-Base_Cabinet_Open_With_Drawer	
SC-MCA-Base_Cabinet_Storage_Apron	
SC-MCA-Base_Cabinet_Storage_Apron_With_Drawer	L 2
SC-MCA-Library_Cabinet_Book_Cart	J
	2 Configure
Database: C:\ProgramData\CTC\Casework Configurator\Casework ConfiguratorData	2015.CCD .::

The "Family Information'	' dialog is used to configure each piece of content in the database.
--------------------------	--

C.	Family Information	+ _ 🗆 ×
	Family Name: SC-MCA-Base_Cabinet_Open Type: Main Casework Assembly	Load Existing Configuration
	Description: Base Cabinet	Compatible Families Select
	Select Preview Image Seed Name: Base Cabinet	
		<u>^</u>
	Parameter	/ Default Value
	Construction Type	
	Elevation Swing	Yes
	Has Clearance	Yes
	Hidden Plan Swing	Yes
Remove Image Select Image	Parameter	/ Default Value
Direlau Caura	Cabinet Box Width	0' - 1"
Display Group.	Counter Thickness	0' - 1 1/2"
Hidden V	<mark>Depth</mark>	2' - 0"
Description:	<mark>Height</mark>	3' - 0"
	Panel Height	2' - 8 3/4"
Min Men Men Men	Panel Thickness	0' - 1 1/2"
Min value. Max value.	Shelf Depth	1' - 11"
	Shelf Height	2' - 7 3/4"
Enforce Specified Values	Shelt Lhickness	
	Tas Kisk Dasth	1 - IU 0' 2"
+		0 - 5
-	Clean	OK Cancel

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.

C	Family Information	
	Family Name: SC-MCA-Base_Cabinet_Open Type: Main Casework Assembly	Load Existing Configuration
	Description: Base Cabinet	Compatible Families Select
	Select Preview Image Seed Name: Base Cabinet	

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.

C	Family Informa	tion			- 🗆 🗙
	Family Name: SC-MCA-Ba Type: Main Casew	se_Cabinet_Open ork Assembly		Load Existing C	Configuration
		Description: Base Cabinet		Compatible Fa	amilies act
	Select Preview Image	Seed Name: Base Cabinet			
	Parameter	Δ	Default Value		^
	Construction Type				

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.

Compatible Families 😁 – 🗖 🗙	Compatible Families 😁 – 🗆 🗙
Cabinet Interior Configurations Cabinet Access Styles	Cabinet Interior Configurations Cabinet Access Styles
Cabinet Interior Configurations	Cabinet Access Styles
SC-CIC-Ceramics_Drying SC-CIC-Display_Shelf SC-CIC-Double_Shelf_Center_Vertical SC-CIC-Double_Shelf SC-CIC-Double_Shelf SC-CIC-Double_Shelf SC-CIC-Coulde_Cubbies SC-CIC-Lazy_Susan_Full_Circle SC-CIC-Lazy_Susan_Full_Circle SC-CIC-Lazy_Susan_Full_Circle SC-CIC-Lazy_Susan_Three_Quarter_Circle SC-CIC-Lazy_Susan_Full_Circle SC-CIC-Lazy_Susan_Full_Circle SC-CIC-Iazy_Susan_Full_Circle SC-CIC-Iazy_Susan_Full_Circle SC-CIC-Iazy_Susan_Full_Circle SC-CIC-Iazy_Susan_Full_Circle SC-CIC-Iazy_Susan_Full_Circle SC-CIC-Iazy_Susan_Full_Circle SC-CIC-Iazy_Susan_Full_Circle SC-CIC-Newspaper_Rack SC-CIC-Negating_Rack SC-CIC-Partial_Lower_Shelf_ADA SC-CIC-Shelf_And_Pole SC-CIC-Shelf_And_Pole_With_Vertical_Division SC-CIC-Shelf_Mith_Hooks SC-CIC-Single_Shelf SC-CIC-Single_Shelf_Center_Vertical SC-CIC-Single_Shelf SC-CIC-Single_Shelf SC-CIC-Single_Shelf SC-CIC-Side_Shelf SC-CIC-Side_Shelf SC-CIC-Teacher_	SC-CAS-Door_4_Split Height ∧ SC-CAS-Drawer_1 SC-CAS-Drawer_1 SC-CAS-Drawer_1_Door_1 ✓ ✓SC-CAS-Drawer_1_Door_2 SC-CAS-Drawer_1_Opening SC-CAS-Drawer_1_Top_6_Bottom SC-CAS-Drawer_2_Horz SC-CAS-Drawer_3_Horz SC-CAS-Drawer_3_Vert SC-CAS-Drawer_3_Vert SC-CAS-Drawer_3_Vert SC-CAS-Drawer_4_Top_1_Bottom SC-CAS-Drawer_4_Ver_4_Sequence SC-CAS-Drawer_4_Ver_3_Settom SC-CAS-Drawer_4_Ver_4_Sequence SC-CAS-Drawer_4_Ver_4_Sequence SC-CAS-Drawer_4_Sequence SC-CAS-Drawer_4_Ver_4_Sequence SC-CAS-Drawer_4_Sequence SC-CAS-Drawer_4_Ver_4_Sequence SC-CAS-Drawer_4_Sequence SC-CAS-Drawer_4_Ver_3_Bottom SC-CAS-Drawer_4_Ver_4_Sequence SC-CAS-Drawer_4_Ver_4_Sequence SC-CAS-Drawer_5_Ver_EQ SC-CAS-Drawer_6_Ver_EQ SC-CAS-Drawer_7_Ver_EQ SC-CAS-Drawer_7_Ver_EQ SC-CAS-Drawer_7_Ver_EQ SC-CAS-Drawer_7_Ver_EQ SC-CAS-Stiding_Door ✓ Check All Check None
OK Cancel	OK Cancel

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.

<u>c</u>	Family Information	+ _ 🗆 ×
	Family Name: SC-MCA-Base_Cabinet_Open Type: Main Casework Assembly	Load Existing Configuration
	Select Preview Image	Compatible Families Select
	Base Cabinet	
Remove Image Select Image	Parameter / Construction Type Elevation Swing Has Clearance Hidden Plan Swing Geometry Parameter / Cabinet Rey Midth	Default Value Yes Yes Yes Default Value 01*
Display Group: Read Only Hidden V Description:	Counter Thickness Depth Height	0' - 1 1/2" 2' - 0" 3' - 0" 2' - 8 2/4"
Min Value: Max Value: Enforce Specified Values	- ranel Height Panel Thickness Shelf Depth Shelf Height Shelf Thickness Shelf Width Toe Kick Depth Toe Kick Height Width	2 - 5 3/4 0' - 1 1/2" 1' - 11" 2' - 7 3/4" 0' - 1" 1' - 10" 0' - 3" 0' - 1 3/4" 2' - 0"
	Clean	OK Cancel

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.

C	Parameter Value	×	
		Select Image	
Display Value: 2' - 6"		Remove Image	Remove Image Select Image Display Group: Read Only
Internal Value:	1		Dimensions v Description:
Description:			Width Min Value: Max Value:
30" base cabinet			Enforce Specified Values 2' - 0"
		ок	2' - 6"
		Cancel	

In this example, we have set the width parameter to 3 possible values, 2', $2 \frac{1}{2}'$ 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).

C.	Select Image	↔ _ □ ×
SC-MCA - Base Cabinet Open - Panel Thickness png	SC-MCA - Base Cabinet Open - Shelf Thickness.png shelf Thickness.png	-MCA - Base Cabinet Open - e Kick Depth.png
SC-MCA - Base Cabinet Open - Toe Kick Height.png	SC-MCA - Base Cabinet Open - SC- Width.png	-MCA - Base Cabinet Open ner - Cabinet Box Width.png
SC-MCA - Base Cabinet Open Comer - Counter Thickness.png	SC-MCA - Base Cabinet Open Comer - Depth.png SC-I	-MCA - Base Cabinet Open ner - Has Clearance.png
SC-MCA - Base Cabinet Open Comer - Height png	SC-MCA - Base Cabinet Open Comer - Panel Thickness.png	-MCA - Base Cabinet Open ner - Shelf Thickness.png
(2) (3)		VOL D. 01/ 10
Add Image Remove Image	Purge Unused	OK Cancel

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...

	Remove Image	Select Image	Parameter	~	Default Value	
Display G	iroup:		Confirm Data Remov	val	×	
Descriptio Width Min Value	: :	1 This will to contin	remove all configurations and data f nue?	or this family.	Are you sure	
Enforce 2' - 0''	e Specified Values			Yes	No	
2' - 6" 3' - 0"		-	Toe Kick Height Width		0' - 1 3/4" 2' - 0"	
			Clean		ОК	Cancel

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.

Load Parent Family Configuration	×	
Current Family: SC-MCA-Base_Cabinet_Cart_Storage		
Parent Family: SC-MCA-Base_Cabinet_Open		
Load Options		
☑ Include Parameter Image Assignments		
Remove Excess Parameter Values		
OK Cancel]	

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.

Family Name	Configured
SC-MCA-Base_Cabine Cart_Storage	✓
SC-MCA-Base_Cabine _Open	✓
SC-MCA-Base_Cabine Open_Comer	 ✓
SC-MCA-Base_Cabine _Open_Comer_Three_Quarter	✓
SC-MCA-Base_Cabine _Open_Comer_With_Apron	✓
SC-MCA-Base_Cabine _0 Edit	✓
SC-MCA-Base_Cabinet_O Update Data for Configured Assemblies in Selection	✓
SC-MCA-Base_Cabinet_O Update Data for All Configured Assemblies	✓
SC-MCA-Base_Cabinet_Open_Countertop_Support_Style_3	✓
SC-MCA-Base_Cabinet_Open_Removable_Back_With_Apron	<
SC-MCA-Base Cabinet Open Removable Back With Apron Behind Doors	-

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.