Quick Start for *RefManager*

Quick Start Objectives

The purpose of this Quick Start is to introduce you to the basic features of *RefManager* so that you can immediately use the program.

This Quick Start should take less than 30 minutes.

Prerequisites

1. *RefManager* for V8 requires MicroStation version 8.1 or later.

2. *RefManager* must be installed on your computer. You can verify this by selecting the Axiom menu from MicroStation's main menu bar, then select *RefManager*. If *RefManager* does not appear in the Axiom menu, follow the instructions in the Installation chapter of this User's Guide.

3. You will need some non-production design files to practice with. The sample files that are delivered with *RefManager* are suitable. These files are typically installed to:

   ```
   C:\ProgramData\Axiom\V8\RefMgr\Sample Files\*.dgn
   ```

Demonstration Version

The *RefManager* demonstration version works the same as the permanent version with one exception. With a demonstration license, *RefManager* only works on files of 100KB or less.

Needless to say, your permanent version of *RefManager* will not have this restriction.

When should I use *RefManager*?

RefManager is most commonly used to handle the following:

- Quickly correct reference attachment paths after moving files from one system to another or after reorganizing the folder structure of a project.

- Generate reports of reference file usage per master file including all attachment settings.

- Generate missing reference file reports.

- Generate cross-reference reports that list master files that each reference file is attached to.

- Attach reference files to a group of design files.

- Detach or replace reference files in bulk.

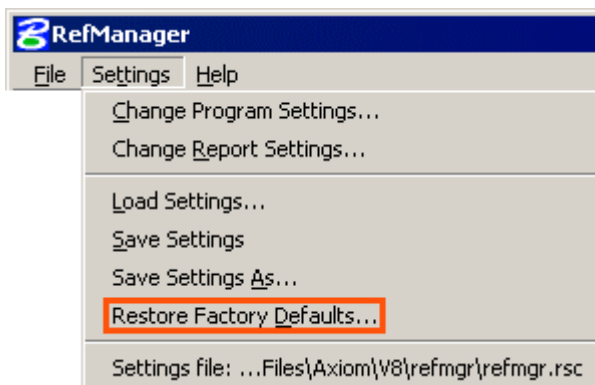- Change the scale, shift, origin or clipping boundary of reference files in bulk.

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- Change other reference file attachment settings in bulk.
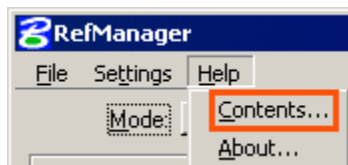
Quick Start Step 1 (Restore Defaults)

First, let's cover the basics.

1. Select *RefManager* from the "Axiom" menu.

2. Just in case someone worked with *RefManager* before you began this Quick Start, let's restore factory defaults:

> **Tip:** You want to ensure that the *RefManager* sample files are restored to their original state prior to continuing with this Quick Start. Open "Windows Explorer" and navigate to your *RefManager* "Samples" folder. There, you will find a "Samples.zip" file that contains a backup copy of *RefManager's* sample files. Open this ZIP file and navigate to the *RefManager* "Sample" folder then click the {Extract} button. This will overwrite the existing files in this "Sample" folder with fresh copies of *RefManager's* sample files. You would also do this if a colleague had previously performed this Quick Start on this same computer.

3. If you have any questions about *RefManager*'s features, the full User's Guide is always available from *RefManager*'s "Help" menu:
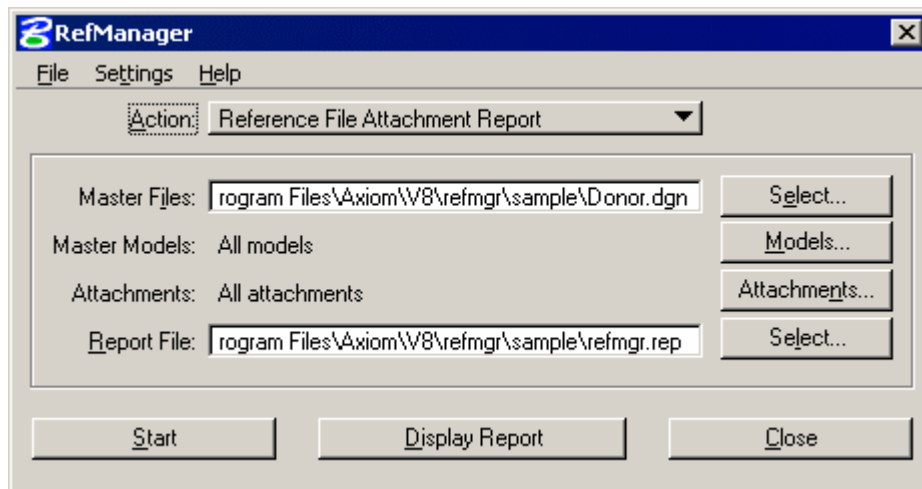

Quick Start Step 2 (Attachment Report)

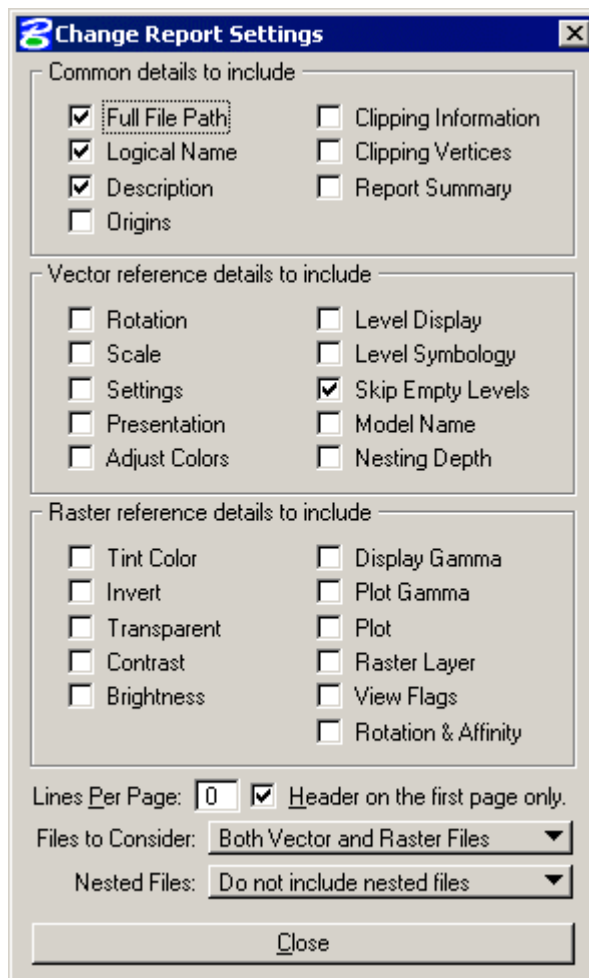How to generate a reference file attachment report:

1. Open the sample design file, `Donor.dgn`. This file is typically installed to:

   `C:\ProgramData\Axiom\V8\RefMgr\Sample Files\Donor.dgn`

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2. Select *RefManager* from the Axiom menu. *RefManager*'s main dialog will display:
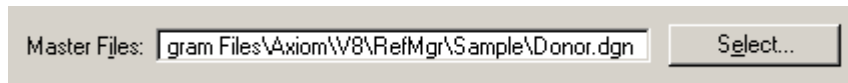

3. Select the "Reference File Attachment Report" command as in the image above.

4. The "Change Report Settings" dialog box opens showing the default settings. This dialog allows you to select the detail to be included in your report. Click {Close} to close this dialog for now.

5. For this test the "Master Files:" field should contain the address of the active file, "Donor.dgn".

Master Files:	gram Files\Axiom\V8\RefMgr\Sample\Donor.dgn	Select...

Tip: You can delete the contents of the "Master Files:" field and press {Tab} to automatically paste in the active file name.

6. Enter an output report file name or click the {Select} button to select a location for your output report.

7. Click the {Start} button.

8. When report processing is complete click the {Display Report} button to view your report.
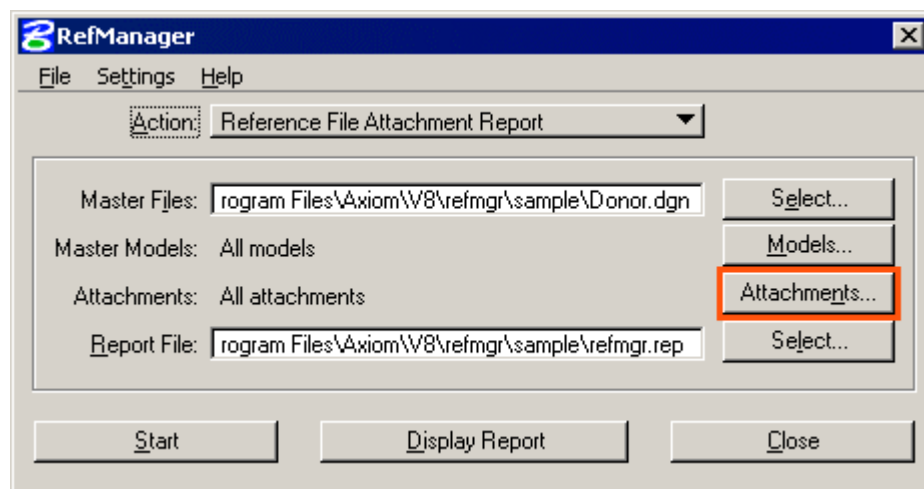
That's all there is to it!

Use the "Change Report Settings" dialog box to control the information that is included about your reference file attachments.

To generate a report about reference file attachments in all sample files, use a wildcard in the "Master Files:" field. For example, replace "...\Donor.dgn" with "…*.dgn" in the "Master Files:" field.

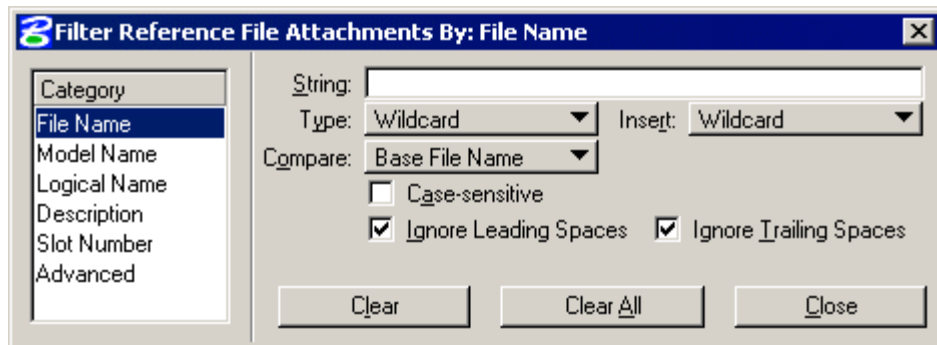## Quick Start Step 3 (Attachment Filter)

How to use *RefManager's* reference file attachment "Filter" to select specific reference files for processing:

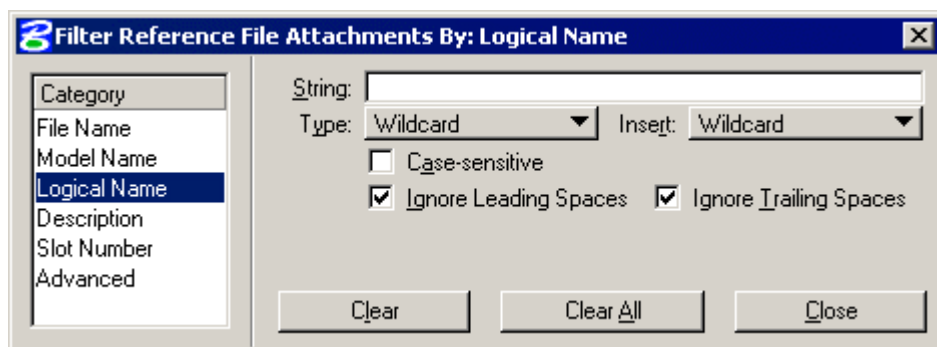1. From *RefManager's* main dialog box, click the {Attachments…} button:
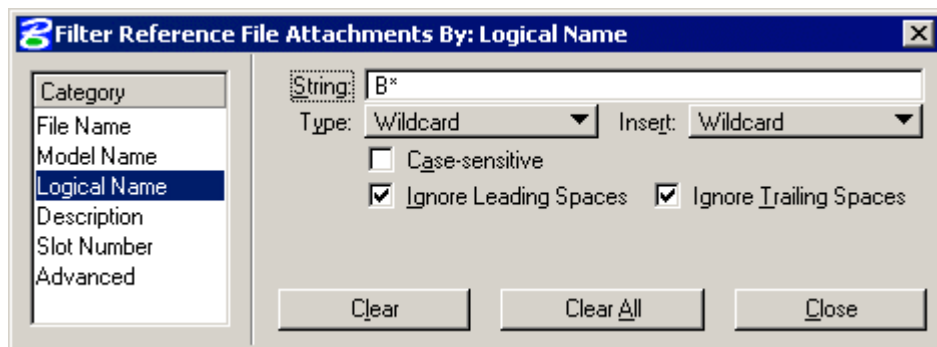
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This displays *RefManager*'s "Filter" dialog box:

2. Click on the "Logical Name" category.

3. Enter "B*" in the "String" field, then, click the {Close} button.

4. From *RefManager*'s main dialog click {Start} to recreate a report.

5. View the report. This time the report only includes attachments when their logical name matches the specified wildcard. In this case, the logical name "Boilerplate" and "Border" matched the filter (indicated with **bold** text for clarity in this document only):

```
===============================================================================
=
2D Design File: C:\ProgramData\Axiom\V8\RefMgr\Sample Files\Donor.dgn -- 18944
bytes

  ----------------------------------------------------------------------------
--
  2D VECTOR REF #1: Reference1.dgn
    Attached File's Location: C:\ProgramData\Axiom\V8\RefMgr\Sample
Files\Reference1.dgn
    Saved Full Path:          (not saved)
    Logical:                  Border
    Description:              Border


  ----------------------------------------------------------------------------
--
  2D VECTOR REF #2: Reference2.dgn
    Attached File's Location: C:\ProgramData\Axiom\V8\RefMgr\Sample
Files\Reference2.dgn
    Saved Full Path:          (not saved)
    Logical:                  Boilerplate
    Description:              Standard Copyright Block
```

Note: *RefManager*'s reference file attachment "Filter" can be used with all *RefManager* commands (not just reports).

6. Before continuing to the next lesson, select "Restore Default Settings" from the "Settings" menu on *RefManager's* main dialog box.
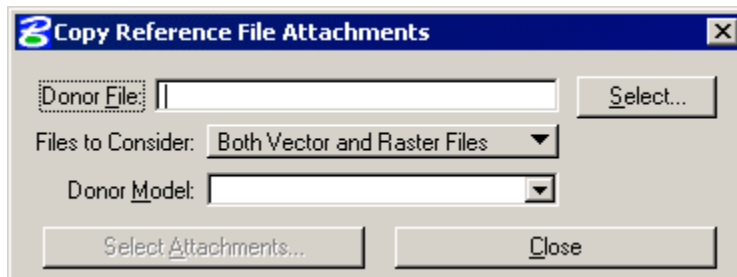
Quick Start Step 4 (Copy Attachments)

How to copy reference files from a donor file to a recipient file:

These are the steps to copy reference file attachments from a "donor" to a selected set of design files.

1. Use the {Select...} button on *RefManager*'s main dialog to find the sample file "Recipient.dgn". This file is typically installed to:
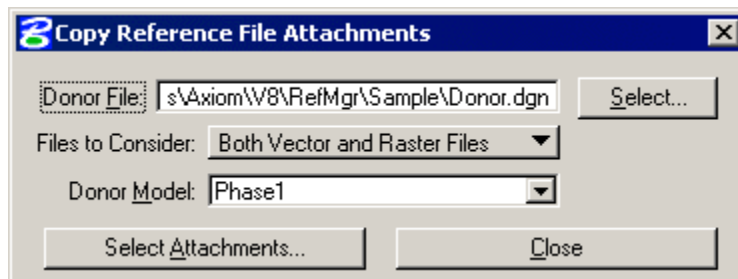
   `C:\ProgramData\Axiom\V8\RefMgr\Sample Files\Recipient.dgn`

2. From *RefManager*'s main dialog, select "Copy Reference File attachments". The "Copy" dialog box will appear:

3. Our "Donor File" will be the delivered sample file "Donor.dgn".

For the purposes of this Quick Start, we will copy all attachments from "Donor.dgn" to "Recipient.dgn". You can control which attachments are copied from the donor file using {Select Attachments…}.

4. From *RefManager*'s main dialog, click the {Start} button.

"Donor.dgn" attachments will be copied to "Recipient.dgn", retaining the original attachment settings.

5. Click the {Display Report} button to see a report about the "Copy" processing.

To copy attachments to multiple project files, just replace "Recipient.dgn" with "*.dgn" in the "Master Files:" field.

This is an effortless way to set up multiple sheet files at the beginning of a project.

Quick Start Step 5 (Modify Attachments)

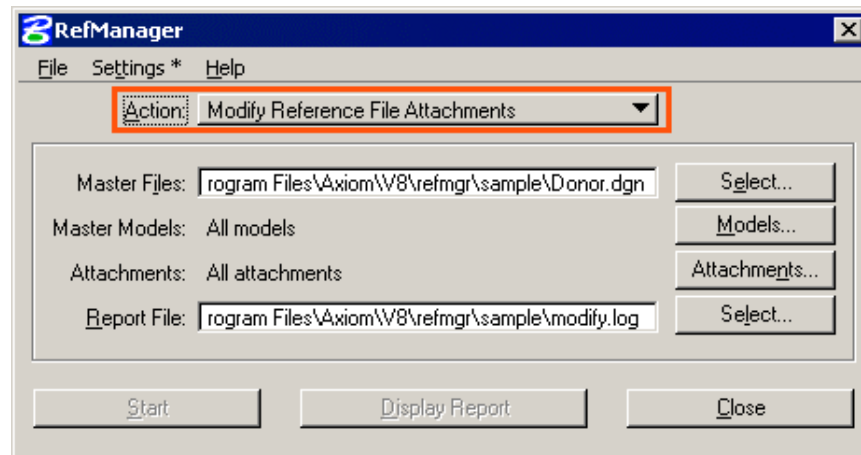How to make global modifications to reference file attachments:

You can use *RefManager*'s "Modify" command to update and standardize just about any reference file attachment parameter in one or many reference file attachments in one or multiple project master files.

In this Quick Start step we will update reference file logical names. The same procedure can be followed to make a modification using any of *RefManager*'s "Modify" categories.
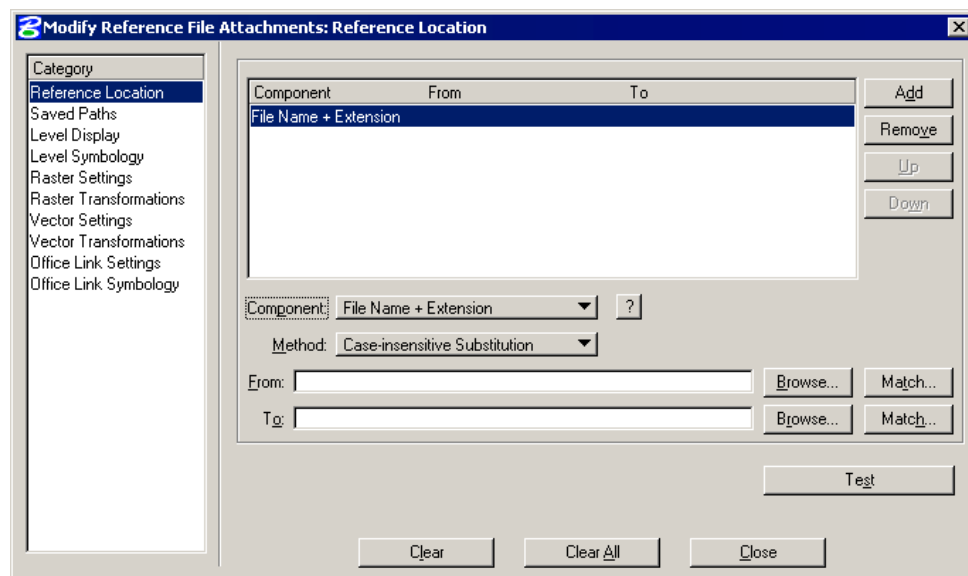
1. Open "Donor.dgn" in MicroStation.

2. Display MicroStation's "References" dialog. Note the logical names for the attached reference files. Leave the "Reference" dialog displayed.

3. Enter "Donor.dgn" into the "Master Files:" field on *RefManager*'s main dialog.

4. From *RefManager*'s main dialog, select the "Modify Reference File Attachments" command:

5. The "Modify" dialog will display. We will use the Modify category "Reference Location" (the default).

6. Select the attachment Component "Logical Name".

7. Enter "Boilerplate" into the "From" field, Enter "Copyright" into the "To" field.

8. Press {Test}. A preview of the Logical Name modification should display.

9. From *RefManager*'s main dialog, click the {Start} button.

10. Re-examine MicroStation's References dialog. The logical name "Boilerplate" should now be replaced by "Copyright".

All *RefManager* "Modify" categories work the same way – select the desired modification and press {Start}.

Use this procedure to modify a single file's attachments or for an entire project – just specify a wildcard in the "Master Files:" field.

You can limit modifications to specific attachments using *RefManager's* attachment "Filter".

Quick Start Completion

Congratulations! That completes the *RefManager* Quick Start.

Go ahead and work with your own files. By default *RefManager* creates a backup of your master files before processing them, so no worries.

Remember that the full User Guide is always available to you from *RefManager*'s Help menu (select "Help | Contents").

See the Frequently Asked Questions section of the full User Guide for answers to the most common questions and miscellaneous tips.

Phone info and e-mail links to Axiom Support and your Axiom MicroStation Consultant are also available from the Help menu (select "Help | About"). Contact us any time.

We are also very interested in requests or suggestions about *RefManager*. We look forward to hearing from you.