



AutoBid SheetMetal

INSTALLATION GUIDE

Revision B
February 2018

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Release Notice

This is the February 2018 release (Revision B) of the AutoBid SheetMetal documentation.

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Overview/Requirements

- ▶ [Installation overview](#)
- ▶ [System requirements](#)
- ▶ [Preliminary installation requirements](#)
- ▶ [Help and support](#)

The Trimble® AutoBid® SheetMetal software can be installed on a network or on a stand-alone single-user computer. When installed on a network, it runs in a client/server environment.

This document guides you through the installation and initial setup processes.

Installation overview

NOTE – Antivirus software such as Sophos may block the installation of the software. Trimble recommends that you disable any antivirus software during the installation process.

ABSM DataService Manager

The AutoBid SheetMetal software requires installation of the ABSM DataService Manager software. This software is automatically installed when you install the AutoBid SheetMetal software. The ABSM DataService Manager and Sybase ASA Service Manager manage all database information.

For information on how to configure the DataService Manager, see [Chapter 5, Getting Started](#).

Trimble Quick Link utility

NOTE – You must install the Trimble Quick Link utility before you install the AutoBid SheetMetal software.

The Trimble Quick Link software utility allows you to easily manage licenses for your Trimble products. The AutoBid SheetMetal software requires Trimble Quick Link for licensing and communication purposes. The software will not run without the Quick Link utility.

For more information, see [Chapter 2, Trimble Quick Link Utility](#).

Stand-alone installation

Installing the AutoBid SheetMetal software on a single-user computer allows access to the database on only that computer. It also provides a central location for the database. When the AutoBid SheetMetal software is installed on a stand-alone computer, routine backups of the software should be performed and saved on a network location or other media to ensure the data is not entirely lost in emergency situations.

For more information, see [Chapter 3, Stand-Alone/Network Installation](#).

Network installation

When you install the AutoBid SheetMetal software on a network, the database is contained in one location with access granted to various users at certain levels. Network installation also provides a central location for database management, maintenance, and backups. After installing on the designated server, you must install the software on each workstation needing access to the database. Routine backups should be performed on a

regular basis. The installation provides an option to set up scheduled backups. Trimble recommends you use this feature to safeguard your important data.

For more information, see [Chapter 3, Stand-Alone/Network Installation](#).

System requirements

Before you install the AutoBid SheetMetal software, please check that your system meets the recommended specifications. These are available on the Trimble website at:

mep.trimble.com/products/estimating/trimble-autobid-sheetmetal/trimble-autobid-sheetmetal-system-requirements

Preliminary installation requirements

- To install the software, you must have administrator privileges.
- It is your responsibility to install the required software and connect the hardware (if necessary).

While Trimble MEP Client Services will assist you as much as possible, we may not be able to assist you with some hardware configuration issues. For assistance in such cases, check with the vendor who supplied the equipment, your local computer dealer, the documentation for your hardware, and/or your company's IT professional.

View the Trimble Quick Link video

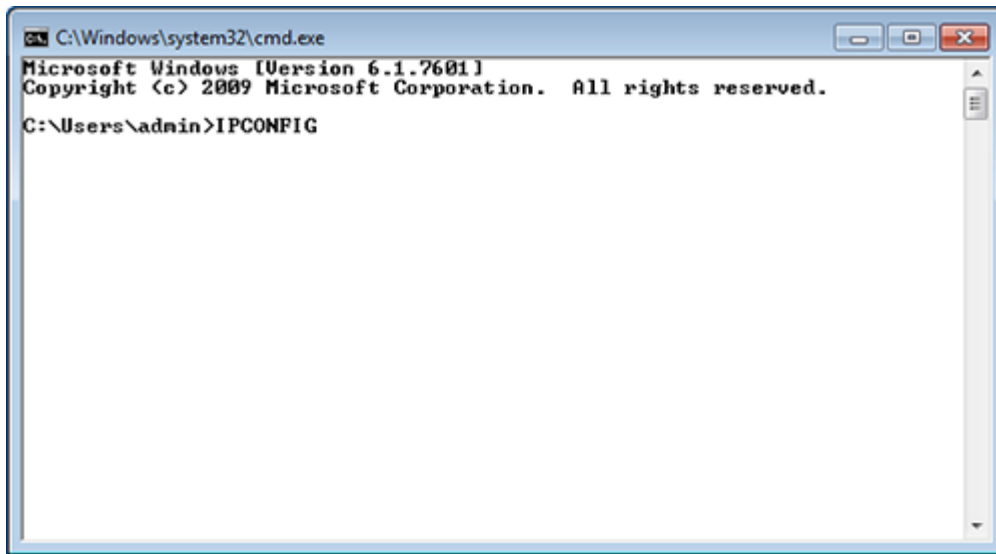
The installation DVD includes a video introducing Trimble Quick Link and how it improves licensing and communication for your Trimble product. We strongly recommend that you view this video before installing AutoBid SheetMetal. See [Chapter 2, Trimble Quick Link Utility](#).

Verify TCP/IP

CAUTION – The AutoBid SheetMetal software and the Trimble Quick Link utility require TCP/IP (Transmission Control Protocol/Internet Protocol). Verify that it is installed on your system before installing the software.

To verify that TCP/IP is installed on your computer:

1. Go to the Windows **Start** menu.
2. In the **Search programs and files** field, type **CMD** and press **Enter**. A window similar to the following displays:



3. At the prompt, type **IPCONFIG** and press **Enter**. If you have TCP/IP installed, the IP address for your machine will display.

If the IP address does not display or you get an error message, contact your company's IT professional for information.

4. To close the window, type **EXIT** at the prompt and press **Enter**.

Help and support

AutoBid SheetMetal provides online documentation and videos that can be accessed from directly within the software.

Help system

- Accessing online help can be done from the AutoBid SheetMetal main window or the AutoBid SheetMetal TakeOff window. Press **F1** or go the **Help** menu.
- You can also press the **F1** key in most windows to take you immediately to the help topic.

Online manuals

The manuals are in PDF format. If you do not have a PDF reader such as Adobe Reader, download Adobe Reader from <https://get.adobe.com/reader/>.

You can access manuals online from the **Help** menu in the software. Alternatively, you can view and/or download them from the Trimble website. Go to mep.trimble.com/support/trimble-autobid-sheetmetal.

Videos

- AutoBid SheetMetal includes video presentations that explain certain features and functions of the application. You can install the videos to your hard drive or view them from the Installation DVD.
- Two types of videos are included:
 - The Video Library provides you with information on how to perform certain functions in the software.
 - What's New videos provide you with information detailing how to use new features and commands available in update releases.

Technical support

You can access support and manuals from the Trimble website:

mep.trimble.com/support/trimble-autobid-sheetmetal

Trimble Quick Link Utility

- ▶ Trimble Quick Link Hub
- ▶ Trimble Quick Link Management Studio
- ▶ Installing the Quick Link Utility

The Quick Link utility enables you to easily manage licenses for your Trimble products. The AutoBid SheetMetal software requires Quick Link for licensing and communication purposes. The software will not run without the Quick Link utility.

You must install Trimble Quick Link before you install the AutoBid SheetMetal application.

There are two modules: Quick Link Hub and Quick Link Management Studio.

Trimble Quick Link Hub

The Hub serves as the central communication link between AutoBid SheetMetal and Quick Link Central (the Trimble licensing server).

If your company has multiple locations using Trimble software applications, you must install the Quick Link Hub at each physical location. There must be at least one Quick Link Hub at each physical location. Trimble recommends that the Trimble Quick Link Hub is installed in a central location accessible by all requiring access to Trimble software applications.

Trimble Quick Link Management Studio

The Quick Link Management Studio allows you to manage your licenses. You can install it on one or multiple workstations.

Trimble recommends that you install at least one copy of the Management Studio at each of your company's physical locations. Trimble recommends that you limit the number of Management Studio installed. Limiting the number of Management Studio installations within your organization provides better license management and security.

Installing the Quick Link Utility

Step 1: Recommendations/Requirements

To ensure correct operation of the Quick Link utility after installation, follow these steps.

Before you install any new or updated software, take the following action:

- Close down all Microsoft® Windows® applications on the server, including email.
- Using the Quick Link Hub typically requires Internet access to allow proper communication with the license server. If you do not have access to the Internet, you must install the Quick Link Hub and then contact Trimble MEP Client Services for further instructions.

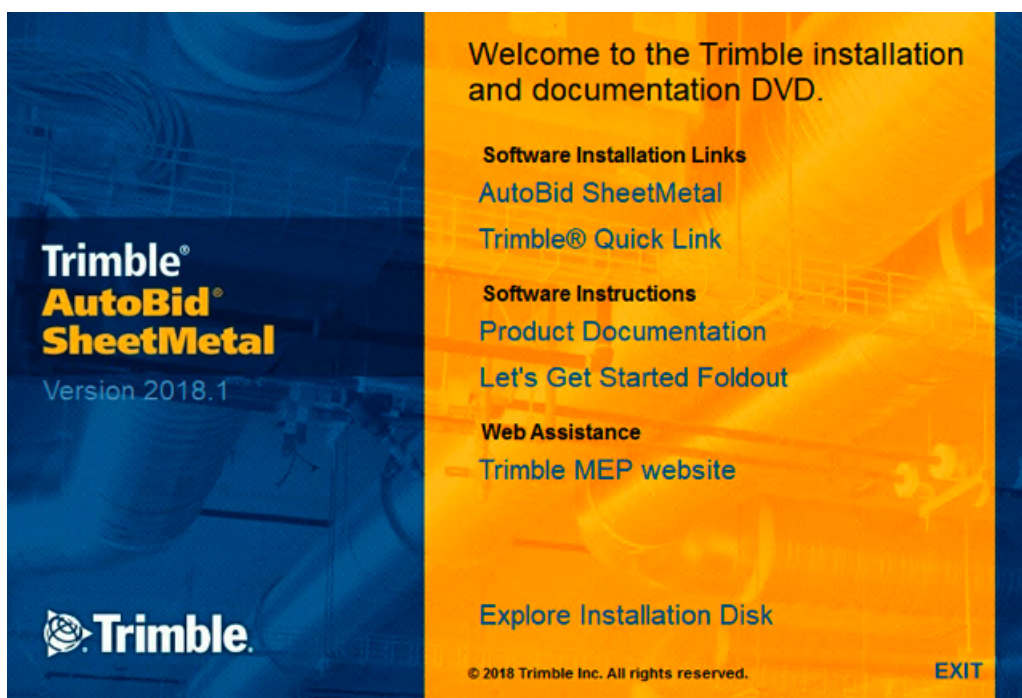
NOTE – *You must have access to email.*

- Trimble recommends that the Trimble Quick Link Hub is installed in a central location accessible by all who require access to Trimble products.
 - In network environments, the DataService Manager is installed in a central location (on a server) and workstations with AutoBid SheetMetal installed connect to it.
 - If you are using the Trimble software as a stand-alone with no access to a network, you must install the Quick Link Hub on that computer.
 - In a stand-alone installation, the DataService Manager and AutoBid SheetMetal are installed on the same computer.

TIP – For Windows Server® 2008 and Server 2008 R2, ensure the .NET Framework Features have been enabled and all .NET updates have been performed. Contact your IT professional if you need assistance with this process.

Step 2: Starting the installation

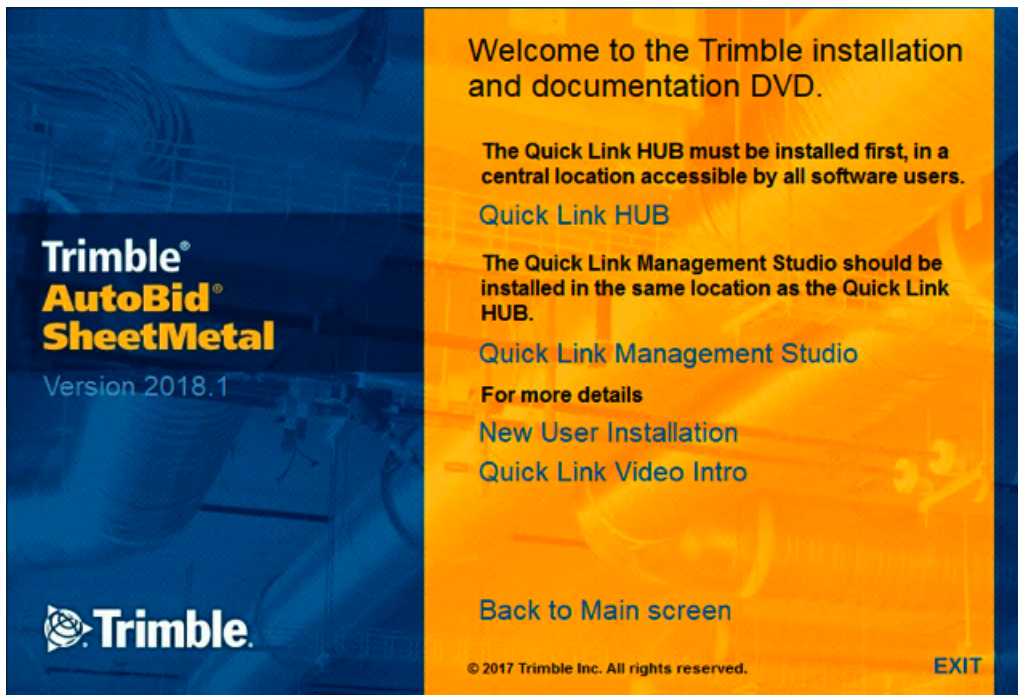
1. Insert the AutoBid SheetMetal Installation DVD into the appropriate drive of the computer where you want to install the Trimble Quick Link Hub. Wait a moment.
2. If the installation does not start a few seconds after you insert the installation DVD, proceed as follows:
 - a. Double-click on the Computer/My Computer icon on your desktop.
 - b. Locate the drive containing the installation DVD. Click on it to display the contents of the DVD.
 - c. Double-click AutoRun.exe to open the main installation screen:



Step 3: Viewing the Trimble Quick Link Video

The installation DVD includes a video introducing the Quick Link features that improve licensing and communication for your Trimble product. Trimble strongly recommends that you view this video before installing any software.

In the main installation screen, click **Trimble Quick Link** and then click **Quick Link Video Intro**.



This video provides you with information about the Trimble Quick Link software application. Trimble recommends that you view this video prior to beginning the installation process.

When viewing is complete, you must maximize the main installation screen by clicking the appropriate taskbar button.

TIP – Depending on your settings, your taskbar button may display as only an icon.

Step 4: Installing the Quick Link Hub

Before installing Trimble Quick Link, you should verify whether the Quick Link Hub is already installed somewhere on your network. In case you are not certain whether the Quick Link Hub is installed, you may need to ask IT Professional for assistance in locating it. If it is installed, you must install the software included with AutoBid SheetMetal to ensure proper licensing functionality.

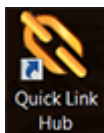
1. On the main AutoBid SheetMetal installation screen, click **Trimble Quick Link** (under Software Installation Links).
2. Click **Quick Link Hub**.
3. The **Welcome** screen displays. Click **Next**.
4. The **License Agreement** displays on the screen. Read the agreement. Choose **I accept the terms of the license agreement**. Click **Next**.

You must accept the terms of the agreement to proceed with the installation. If you want a hard copy of the agreements, click **Print**.

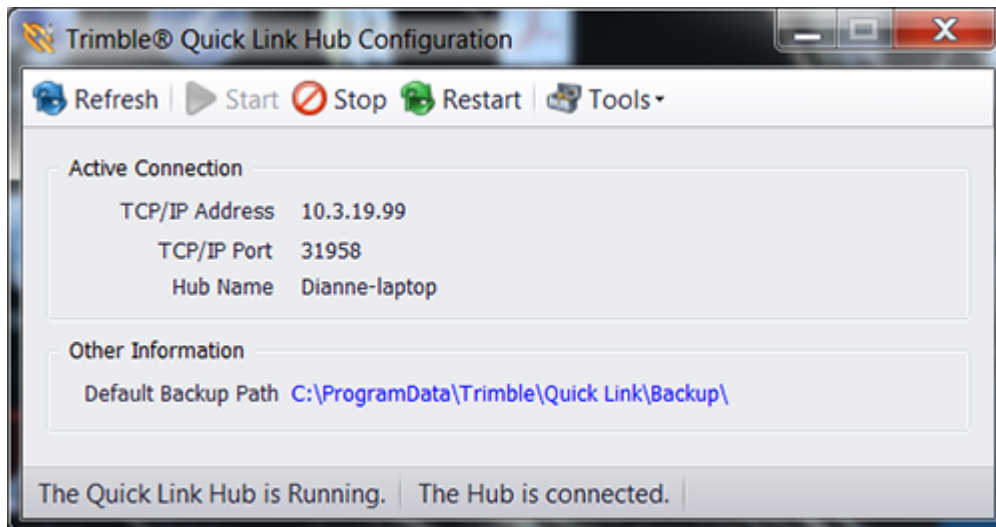
5. In the **Choose Destination Location** screen, click **Next**.

We recommend that you accept the default location.

6. In the **Ready to Install the Program** screen, read the information provided. When you are ready to begin the procedure, click **Install**. The procedure installs the required files and configures the service. Please be patient as this process may take a few minutes.
7. Click **Finish**.
8. Open the Trimble Quick Link Hub to obtain the TCP/IP address and TCP/IP port for the computer where the software is installed. You need this information when installing AutoBid SheetMetal and the Management Studio.
 - a. From the **Windows Start** menu, select **Trimble Quick Link / Quick Link Hub** or on the desktop, double-click



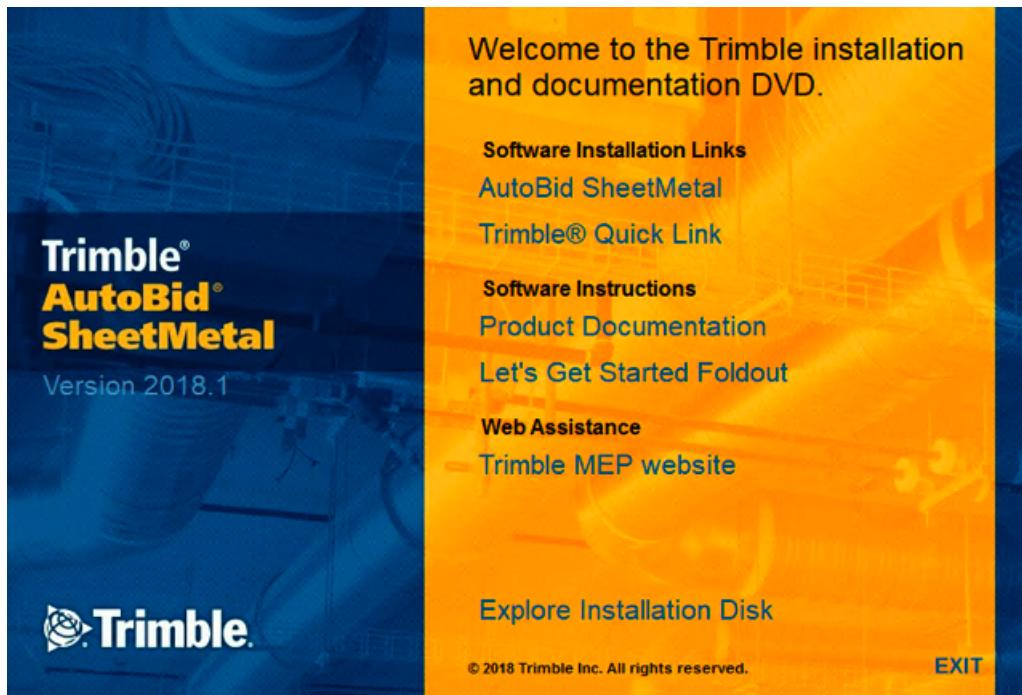
The Quick Link Hub configuration window appears:



Step 5: Installing Quick Link Management Studio

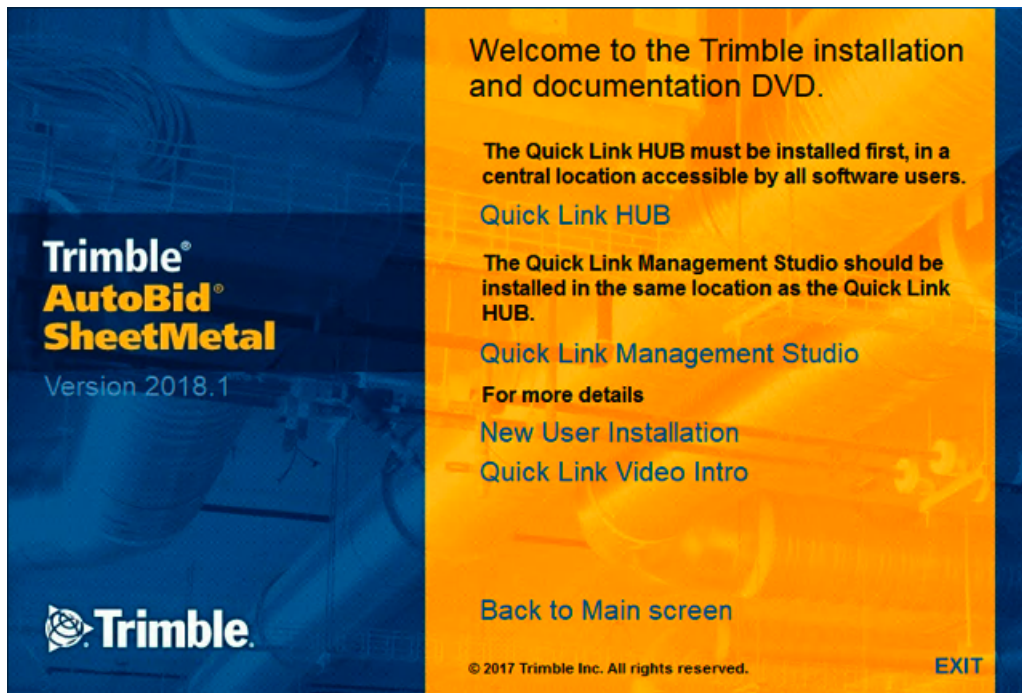
TIP – Trimble recommends that you limit the number of Management Studio installations within your organization. Limiting the number of Management Studio installations within your organization provides better license management and security.

1. If you are installing the Management Studio on a different computer, insert the DVD into the appropriate drive of that computer. Click **Trimble Quick Link**:



OR

If you are installing it on the same computer, click **Quick Link Management Studio**:



2. The **Welcome** screen displays. Click **Next**.
3. The **License Agreement** displays on the screen. Read the agreement. Choose **I accept the terms of the license agreement**. Click **Next**.
4. You must accept the terms of the agreement to proceed with the installation. If you want a hard copy of the agreements, click **Print**.
5. In the **Choose Destination Location** screen, click **Next**.
Trimble recommends that you accept the default location.
6. In the **Ready to Install the Program** screen, read the information provided. When you are ready to begin the procedure, click **Install**.
7. Click **Finish**. See [Configuring the Quick Link Management Studio, page 32](#) for information on configuring the Management Studio. No action is required at this time.

In order to install the AutoBid SheetMetal software, click **Back to Main** screen and then refer to [Chapter 3, Stand-Alone/Network Installation](#) for instructions.

Stand-Alone/Network Installation

- ▶ Stand-alone installation
- ▶ Network installation
- ▶ Installing the software

This chapter explains how to install AutoBid SheetMetal software for use on a stand-alone computer or on a network.

Before you begin, determine the environment in which AutoBid SheetMetal will be used. You can either install AutoBid SheetMetal on a stand-alone computer or a computer designated as the server (for network installations).

Stand-alone installation

Stand-alone users need only install the software on a designated computer. You must install all components of the software on the computer. You will be given this option in the installation wizard.

If you are installing the AutoBid SheetMetal software on a stand-alone computer, complete the procedures on the following pages.

Network installation

The network installation must first be performed on the computer designated as the “network server” or “database server”. This does not have to be the same computer already designated as your current network server.

If you will be using the AutoBid SheetMetal software on a network, complete the procedures on the following pages.

After you have completed the installation on the designated server, you must also install the software on each of the workstations that will be accessing the AutoBid SheetMetal software. These procedures are covered in [Chapter 4, WorkStation Installation](#).

When you install AutoBid SheetMetal as a network user, the DataService Manager must be installed on a computer designated as the server. All AutoBid SheetMetal workstations then connect to that computer.

When you install AutoBid SheetMetal on a network server, you have two options:

- Only install the DataService Manager
- Install a stand-alone version of the software on the server

Refer to the following comparison.

Type	Advantage	Disadvantage
DataService Manager installation	<ul style="list-style-type: none"> • DataService Manager functionality is available. • AutoBid SheetMetal program files are not installed, so less disk space is required. 	<ul style="list-style-type: none"> • You cannot operate the AutoBid SheetMetal client-side programs at the DataService (TakeOff, project maintenance, table and library maintenance). • You can access the database only from workstations.
Stand-alone installation on the network server	<ul style="list-style-type: none"> • DataService Manager functionality is available. • You can operate AutoBid SheetMetal programs at the DataService computer (TakeOff, project maintenance, table and library maintenance). • You can access database functions from the server as well as from the workstations where AutoBid SheetMetal is installed. 	<ul style="list-style-type: none"> • Requires additional disk space. • You may not be able to access the database if all available licenses are in use.

Installing the software

Step 1: Recommendations/Requirements

Before you install the software, take note of the following:

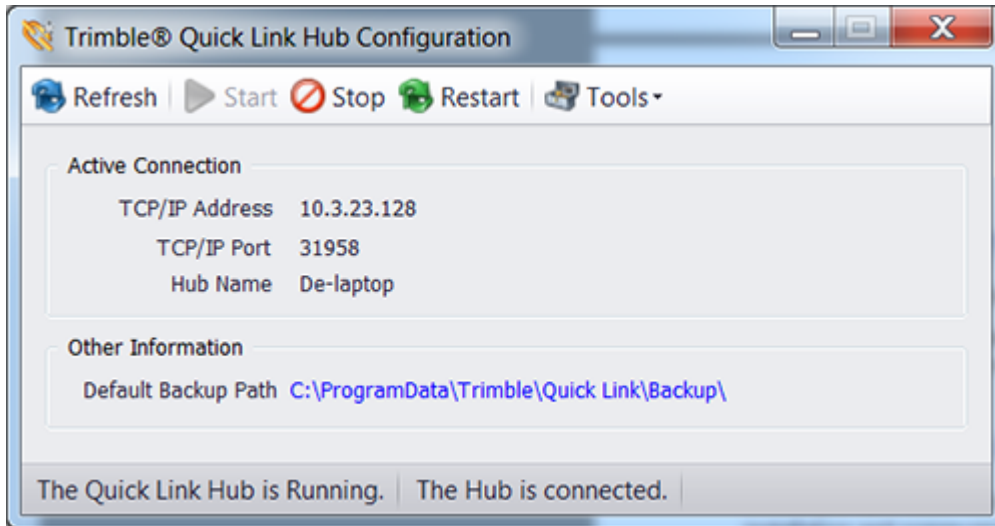
- Close down all Microsoft Windows applications on the workstation computer, including email.
- The DataService Manager manages information in the AutoBid SheetMetal database.
- Trimble recommends that you install the DataService Manager to a physical drive rather than a mapped one.
- Because the data is transferred via TCP/IP, you do not need direct access to the files on the server.
- A shared directory is not required. When a shared directory is created and AutoBid SheetMetal is installed to this folder, licensing issues/problems will result. Your System Administrator can assist you with any questions.

Step 2: Installing the Trimble Quick Link utility

- If you have not already done so, you must install the Quick Link utility before installing the AutoBid SheetMetal software. See [Chapter 2, Trimble Quick Link Utility](#).

Step 3: Validating the Quick Link Hub

Before you can install AutoBid SheetMetal, the correct installation and communication of the Quick Link Hub must be validated. *You must have this information available to proceed. You must have the TCP/IP Address and TCP/IP Port for the Quick Link Hub.*



1. From the Installation DVD, under **Software Installation Links**, click **AutoBid SheetMetal**.

Trimble has built-in several validations to ensure Trimble® Quick Link and AutoBid SheetMetal can communicate properly after installation. *Your Quick Link Hub must be validated before you can continue the installation.*
2. In the **Check Quick Link Installation** dialog, enter the following information:
 - a. **Hub Address** – This is the TCP/IP Address assigned to the Quick Link Hub.
 - b. **Port** – This is the TCP/IP Port assigned to the Quick Link Hub. *The default Port should always be 31958.*
3. Click **Continue**. When you click **Continue**, the application validates the installation and communication with the Quick Link Hub.
 - If the installation/communication is validated, the installation routine will proceed. Go to [Step 4: Continue the installation, page 23](#)
 - If installation/communication cannot be validated, click **Go Back** and make sure you have entered the correct information. Make any necessary corrections and then click **Continue Install** again. [Step 4: Continue the installation, page 23](#)

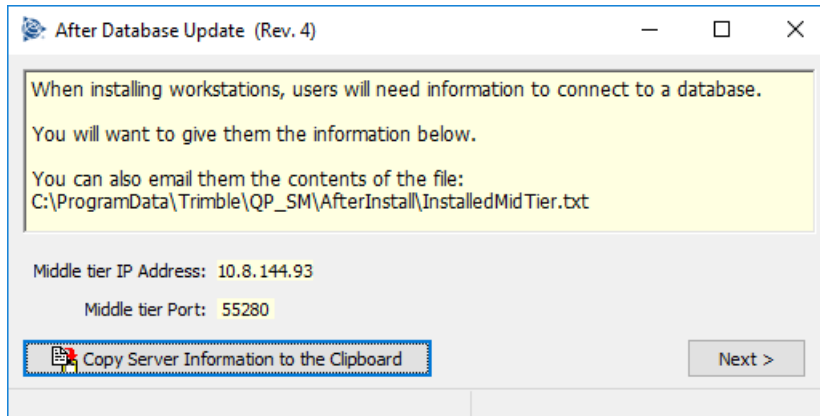
TIP – If you have entered the correct information and the data cannot be validated, you will need assistance from your IT professional. Trimble has provided an Installation Checklist to step through some troubleshooting procedures in order to ensure your environment allows the proper required communication.

Step 4: Continue the installation

1. The InstallShield wizard prepares to install the software. Please be patient. This process may take a few minutes.
2. The **Welcome to the Installation Wizard for AutoBid SheetMetal** screen displays. Click **Next**.
3. The **License Agreement** displays on the screen. Read the agreement. Choose **I accept the terms of the license agreement**. Click **Next**.
4. The **Support License Agreement** displays on the screen. Read the agreement. Choose **I accept the terms of the support license agreement**. Click **Next**.
5. You must accept the terms of each agreement to proceed with the installation. If you want to print the agreements before proceeding, click the **Print** button.
6. The **Access Control Options** screen displays. Choose one of the following options:
 - **Access is allowed for anyone who uses this computer (all users)** – This allows anyone who logs into your computer (regardless of login information) to open the software application. They must, however, have proper security rights to use AutoBid SheetMetal.
 - **Access is allowed only for me (computer or user name displays)** – This allows only the login that matches the computer or user name to open the software application.
7. Click **Next**.
8. In the **Select AutoBid® SheetMetal Options** screen, choose one of the following options:
 - **AutoBid SheetMetal Stand Alone** (includes both DataService and Workstation) – The Stand-Alone option provides full access to the AutoBid SheetMetal software on the installation computer. If this is your designated server, full access is available on this computer also. **Stand-Alone users must select this option.**
 - **AutoBid SheetMetal DataService \ Network** – You can choose this option, depending on your preferences. Refer to the table on [Network installation, page 20](#) for installation options available. .
9. Click **Next**.
10. The **Choose AutoBid SheetMetal Destination Location** screen displays. Trimble recommends that you install the software in the default location displayed on the screen. Click **Next**.
11. A recap of your selections displays in the **Start Copying Files** screen. If you are satisfied with the data displayed, click **Next**.

12. An information message appears: **Install complete. Be sure to record information for client installs.** Click OK.

The After Database Update screen appears:



13. Select the **Copy Server Information to the Clipboard** option and click **Next**.
14. The **After Workstation Install** window appears. When setup is complete, click **Next**.
15. When all files are installed, click **Finish**.

Step 5: Configuring the Quick Link Management Studio (network installations only)

If you have installed the AutoBid SheetMetal software on a network, you should configure the Quick Link Management Studio before installing the AutoBid SheetMetal software on the workstations. See [Configuring the Quick Link Management Studio, page 32](#).

Step 6: Workstation (network installations only)

If you installed AutoBid SheetMetal on a network, you must install the application on each workstation requiring access to the AutoBid SheetMetal database. (This access is required in order to run the software.) See [Chapter 4, WorkStation Installation](#).

WorkStation Installation

► Installing the software on a workstation

If you have chosen to do a network installation, the AutoBid SheetMetal software must be installed at each individual workstation that requires access to the database. This step activates the software on each workstation allowing it to communicate with the DataService Manager.

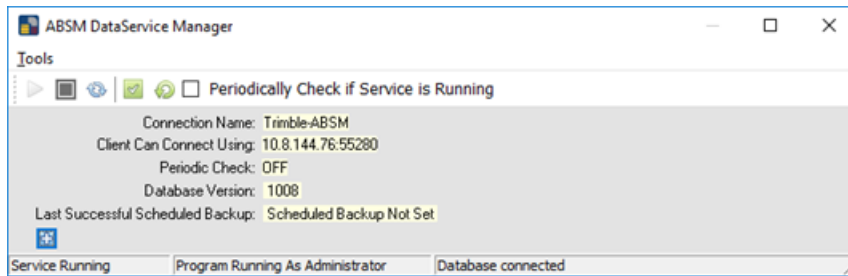
Installing the software on a workstation

Step 1: Preliminary steps

Before you install the software, take note of the following:

- Before you begin workstation installations, please complete the installation of AutoBid SheetMetal on the designated server. See [Chapter 3, Stand-Alone/Network Installation](#).
- You must have installed the Quick Link utility. See [Chapter 2, Trimble Quick Link Utility](#).
- You must have the TCP/IP Address and TCP/IP Port for the Quick Link Hub:

During the workstation installation, you must enter the TCP/IP address and port number to access the computer where the DataService Manager is installed. This information can be found on the DataService Manager window:

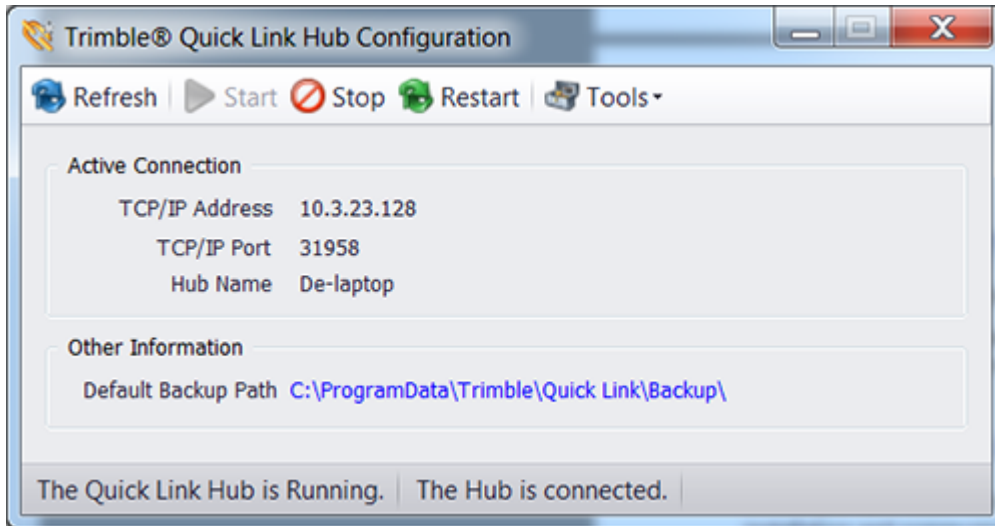


Make sure you have this information available before you begin the installation process.

- Close down all Microsoft Windows® based applications on the workstation computer, including e-mail software.

Step 2: Validating the Quick Link Hub

Before you can install AutoBid SheetMetal, the correct installation and communication of the Quick Link Hub must be validated. *You must have this information available to proceed. You must have the TCP/IP Address and TCP/IP Port for the Quick Link Hub.*



1. From the Installation DVD, under **Software Installation Links**, click **AutoBid SheetMetal**.

Trimble has built-in several validations to ensure Trimble® Quick Link and AutoBid SheetMetal can communicate properly after installation. *Your Quick Link Hub must be validated before you can continue the installation.*
2. In the **Check Quick Link Installation** dialog, enter the following information:
 - a. **Hub Address** – This is the TCP/IP Address assigned to the Quick Link Hub.
 - b. **Port** – This is the TCP/IP Port assigned to the Quick Link Hub. *The default Port should always be 31958.*
3. Click **Continue**. When you click **Continue**, the application validates the installation and communication with the Quick Link Hub.
 - If the installation/communication is validated, the installation routine will proceed. Go to [Installing the software on a workstation, page 27](#)
 - If installation/communication cannot be validated, click **Go Back** and make sure you have entered the correct information. Make any necessary corrections and then click **Continue Install** again. [Installing the software on a workstation, page 27](#)

TIP – If you have entered the correct information and the data cannot be validated, you will need assistance from your IT professional. Trimble has provided an Installation

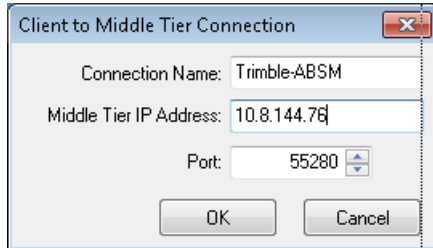
Checklist to step through some troubleshooting procedures in order to ensure your environment allows the proper required communication.

Step 4: Continue the installation

1. The InstallShield wizard prepares to install the software. Please be patient. This process may take a few minutes.
2. The **Welcome to the Installation Wizard for AutoBid SheetMetal** screen displays. Click **Next**.
3. The **License Agreement** displays on the screen. Read the agreement. Choose **I accept the terms of the license agreement**. Click **Next**.
4. The **Support License Agreement** displays on the screen. Read the agreement. Choose **I accept the terms of the support license agreement**. Click **Next**.
5. You must accept the terms of each agreement to proceed with the installation. If you want to print the agreements before proceeding, click the **Print** button.
6. The **Access Control Options** screen displays. Choose one of the following options:
 - **Access is allowed for anyone who uses this computer (all users)** – This allows anyone who logs into your computer (regardless of login information) to open the software application. They must, however, have proper security rights to use AutoBid SheetMetal.
 - **Access is allowed only for me (computer or user name displays)** – This allows only the login that matches the computer or user name to open the software application.
7. Click **Next**.
8. In the **Select Options** screen, choose **AutoBid SheetMetal Workstation**. Click **Next**.
9. Click **Next**.
10. The **Choose AutoBid SheetMetal Destination Location** screen displays. Trimble recommends that you install the software in the default location displayed on the screen. Click **Next**.
11. A recap of your selections displays in the **Start Copying Files** screen. If you are satisfied with the data displayed, click **Next**.
12. The **After Workstation Install** screen appears. Click **Next**.
13. Choose **Finish** to complete the installation.
14. Start the AutoBid SheetMetal by double-clicking on the Trimble ABSM desktop icon:



The Client to Middle Tier Connection screen appears:

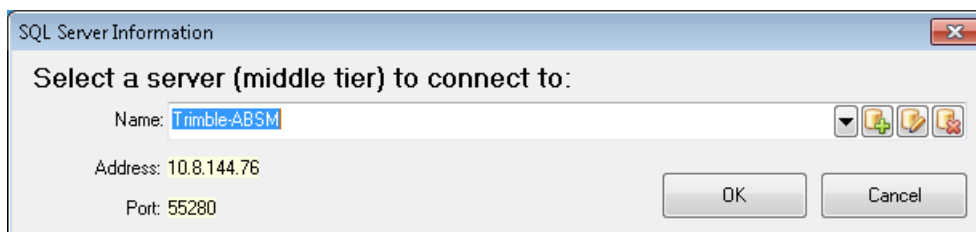


15. Enter the following information. This information was copied to the clipboard (see [Installing the software, page 21](#)). Else, you can obtain it directly from the ABSM DataService Manager:

- Connection Name
- Middle Tier IP Address
- Port – Enter 55280.

16. Click OK.

The SQL Server Information screen appears.



17. In the **Name** field, select the Connection Name you just entered into the Client to Middle Tier Connection dialog and click OK.

Getting Started

- ▶ [Configuring the Quick Link Management Studio](#)
- ▶ [Backup settings](#)
- ▶ [Opening the AutoBid SheetMetal software](#)
- ▶ [Checking the database](#)
- ▶ [Restoring backups](#)

When you complete the installation of your AutoBid SheetMetal software, you are ready to create the preliminary settings to run the software.

This chapter provides you with instructions on what to do after the installation is complete, including:

- [Configuring the Quick Link utility](#)
- [Configuring the DataService Manager](#)

Before you proceed with the directions contained in this chapter, make sure you have installed all required software as outlined in [Chapter 3, Stand-Alone/Network Installation](#).

Configuring the Quick Link Management Studio

Before you can use the Trimble Quick Link Management Studio, it must be configured to communicate with the Hub.

The Quick Link Management Studio requires a login name and password. This provides security for other sensitive information and your product licenses. Trimble Quick Link includes defaults that allow you initial access to the database. You can add users/passwords under **Tools / Quick Link Employees**. Refer to the Help in Trimble Quick Link.

1. Open the Trimble Quick Link Management Studio using one of the following methods:

- Click **Quick Link Management Studio** on your desktop:



- Go to the **Windows Start** menu and navigate to **Trimble® Quick Link**. Click on it and then click **Management Studio**.

TIP – The Quick Link Hub must be running before you can open the Quick Link Management Studio.


2. In the **Connect to the Trimble® Quick Link Hub** screen, enter the following:

Login Name: **admin**

Password: **admin**

To protect your data, Trimble recommends that you change the password for the default login as soon as possible.

3. To save the password for future use, click the **Remember Password** checkbox.
4. Review the information presented on this screen and then enter the IP Address for the Trimble Quick Link Hub.

 **CAUTION** – Do not change the port number. Changing the port number will cause connectivity conflicts to the Hub (based on firewall settings). *Trimble highly recommends that the default port number 31958 is used.* For more information, contact your system administrator.

5. Click **OK**. The **Quick Start** wizard opens. This wizard guides you through setting up the Management Studio for correct licensing and communication. Refer to the Help in Trimble Quick Link.

Backup settings

Periodic backups of your data should be performed. This provides you with a safeguard against data loss in your AutoBid SheetMetal system.



CAUTION – You must complete the procedures outlined in order to produce accurate and timely backups of your database. Failure to complete these procedures may cause loss of data in your AutoBid SheetMetal database.

Backup and restore login

TIP – You must have the correct access rights to perform the backup and restore features.

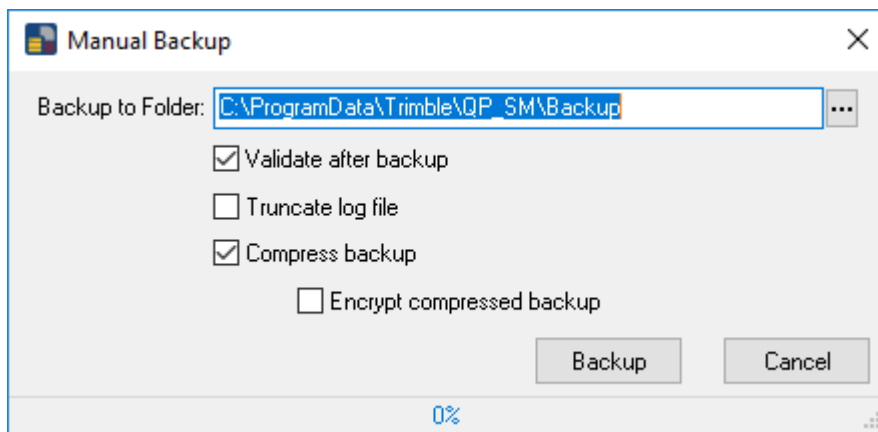
To perform many of the backup and restore functions, you are required to log into the database. This feature provides additional security for database protection.

1. Open the ABSM DataService Manager.
2. Choose either **Tools / Set Scheduled Backups** or **Tools / Manual Backup**. You will be required to login. The following is an example of the **Login for Manual Backup** window.
3. Complete the following fields:
 - Login name** – If not already present, enter **admin**.
 - Password** – Enter the password to access the window. The default AutoBid SheetMetal password is included on the last page of this manual.
4. Click **OK**.

Performing manual backups

You can perform a backup anytime you choose by creating a manual backup.

1. In the ABSM DataService Manager, choose **Tools / Manual Backup**.
2. You will be asked to log in. The **Manual Backup** window appears:



3. Choose and complete data for one of the following options.
4. **Backup to Folder** – Enter the location (drive letter, folder and file name) where you want the scheduled backup created. If this is not the first time you have performed a manual backup, you can select Default Backup Location from the list if desired. This will create the backup under the AutoBid SheetMetal folder, for example, C:\ProgramData\Trimble\QP\Backup. Alternatively, click to browse to the location of your choice.
5. **Validate after backup** – Validates all tables that are expected to be backed up, have been backed up.
6. **Truncate log file** – All information is stored in the database log file. After extensive use of the database, the size of this file may become unmanageable. The truncate feature will reduce the size of the file.
The database log file is included in all full backups. Trimble recommends that you truncate the database logs on a weekly basis only if you have performed periodic full backups.
7. **Compress backup** – Compressing the backup saves disk space.
8. **Encrypt compressed backup** – Encrypting the backup provides better security for your data.

Setting scheduled backups

AutoBid SheetMetal includes the option of creating regularly scheduled backups, which occur daily at the time you specify. This option protects your data with no required action on your part. Other options can be scheduled at the same time scheduled backups are performed.

TIP – The DataService Manager must be running to produce a scheduled backup.

Network users – Make sure you allow enough time for your daily backup to complete before your server system backup begins. Because the DataService Manager must remain running for a scheduled backup, none of the AutoBid SheetMetal files will be included in your server backup. The scheduled backup file will be included if you are creating the file on your network server, provided it is completed!

1. In the ABSM DataService Manager, choose **Tools / Set Scheduled Backups**:

2. Complete the following information in the **Settings** pane:

Backup daily at – Select the time you want the scheduled backup created. You might want to choose a time when no one is working in AutoBid SheetMetal. While the backup will still be created, it will slow processing for other users working in the application.

Backup to Folder – Enter the location where you want the scheduled backup created. If this is not the first time you have set scheduled backup parameters, you can select Default Backup Location from the list if desired. This will create the backup under the AutoBid SheetMetal folder, for example, C:\ProgramData\Trimble\QP_SM\Scheduled Backup.

Trimble recommends that you select a location other than the hard drive where your AutoBid SheetMetal system is installed.


Single Backup – Each backup performed overwrites the backup from the previous day.

Backup to "day of week" folder – One backup will be stored for each day of the week. They will be overwritten each week.

3. Complete the following information in the **Options** pane:

Enabled Scheduled Backups – Ensure this check box is selected.

Truncate the log file every backup – The DataService Manager saves all information in the database log file. After extensive use of the database, the size of this file may become unmanageable. The truncate feature will reduce the size of the file on a weekly basis.

 **CAUTION** – The database log file is included in all full backups. Trimble recommends that you truncate the database logs on a weekly basis only if you have performed periodic full backups.

Set database to "read only" during backup – Ensures that no one can make changes in the database while it is being backed up.

4. Click **OK**. The backup will be created at the time you specify.

Opening the AutoBid SheetMetal software

Accessing AutoBid SheetMetal is the same for network and stand-alone installations.

1. Verify that the DataService Manager is open and running on the network server or on the stand-alone computer before proceeding. This can be done by viewing the lower left hand corner of the ABSM DataService Manager window
2. Verify that the Trimble Quick Link Hub is running. This can be done by viewing the lower left hand corner of the ABSM DataService Manager window

Trimble provides you with an initial user name and password to access the database for the first time. The initial user name and password allows access to all areas of AutoBid SheetMetal. The initial password is included at the end of this manual. Trimble strongly recommends that you immediately change this password to one of your choice taking note of the new password. Trimble also suggests that you create at least one employee in the software. This employee should be assigned full rights to access AutoBid SheetMetal.

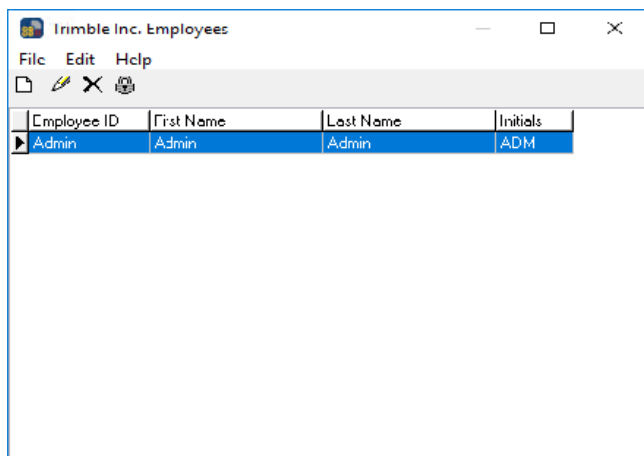
TIP – The DataService Manager must be running on the computer designated as the server to activate the AutoBid SheetMetal database. You will receive an error message if it is not running.

Changing the initial password

The initial access password provided allows access to all areas of the AutoBid SheetMetal software. To protect your data, Trimble suggests that you immediately change this password.

1. In the main window, choose **Master Settings / Employees**. The **Employees** window displays.

The default employee, Admin, will be highlighted.



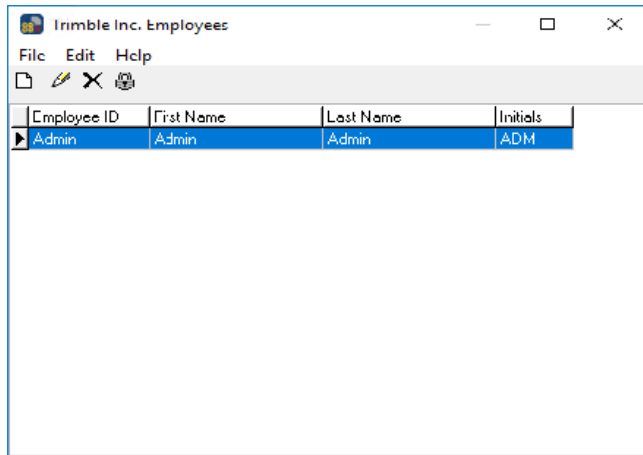
2. Choose **Edit / Employee Security**. The **Security Options** window for the user Admin displays.
3. In the **Password** field, enter the new password for the Admin user.
4. Click **OK**. Close the **Employees** window.
5. After you have modified the default password, close both the AutoBid SheetMetal software and the ABSM DataService Manager. This is a safeguard and allows the DataService Manager to recognize the new password.
6. Reopen the software and use the new password.

Creating an administrator

The software already has an administrator added. You can add more administrators if necessary. This is the primary person(s) responsible for maintaining the AutoBid SheetMetal database.

To add an employee administrator to the AutoBid SheetMetal database:

1. In the main window, choose **Master Settings / Employees**. The **Employees** window displays:



2. Either click  or choose **Edit / Add Employees**.

The **Add Employee** window displays:

The screenshot shows a window titled "Add Employee" with a close button (X) in the top right corner. The window contains four input fields on the left and three buttons on the right:


- First Name:** [Input field]
- Last Name:** [Input field]
- Initials:** [Input field]
- Employee ID:** [Input field]
- Add** button
- Close** button
- Help** button

3. Complete the following information:
 - First Name** – Enter the employee's first name.
 - Last Name** – Enter the employee's last name.
 - Initials** – Enter the employee's initials.
 - Employee ID** – Enter the identification of the employee.

4. Click **Add**.
5. Click **Close**.

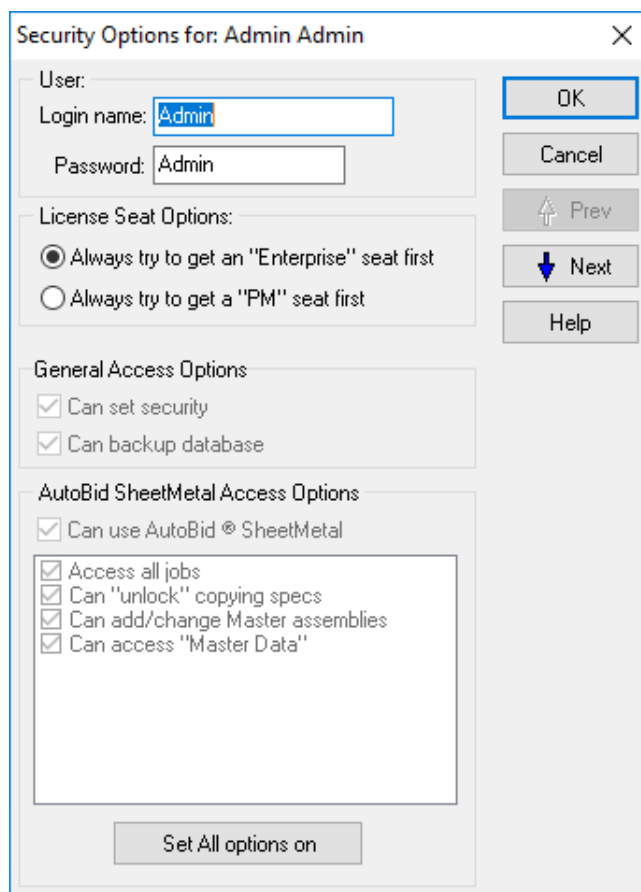
Setting security and access

After you have added the employee administrator to the database, you must set access to the appropriate rights.

 **CAUTION** – The employee administrator may be unintentionally locked out of AutoBid SheetMetal if access settings are not correctly done. Please be very careful when entering and choosing the options in the **Security Options** window.

1. In the **Employees** window, highlight the employee administrator you created in the **Employee List**.
2. Either click  or choose **Edit / Employee Security**.

The **Security Options** window for that employee displays:



Security Options for: Admin Admin

User:

Login name:

Password:

License Seat Options:

☒ Always try to get an "Enterprise" seat first

☐ Always try to get a "PM" seat first

General Access Options

☒ Can set security

☒ Can backup database

AutoBid SheetMetal Access Options

☒ Can use AutoBid ® SheetMetal

☒ Access all jobs

☒ Can "unlock" copying specs

☒ Can add/change Master assemblies

☒ Can access "Master Data"

OK Cancel Prev Next Help

Set All options on

3. Complete the information in the **User** pane.

TIP – If you are running AutoBid SheetMetal on a network, it is recommended that you use login names and passwords. Requiring employee login names protects your system from unauthorized access.

Login name – Enter a user name the employee will use to log into AutoBid SheetMetal. If you are using AutoBid SheetMetal on a network, the Login name should be the same one used to login in to the network.

Password – Enter the password the employee administrator will use when logging into the system. This can be the same password used when logging into the network computer. However, you can set up unique passwords to log into AutoBid SheetMetal.

The employee administrator must know the password you create. Without this information, they will be unable to access AutoBid SheetMetal.

4. In the **License Seat Options** pane, selection the option that best applies for how the employee will be using AutoBid SheetMetal:

Always try to get an “Enterprise” seat first – The Enterprise license is required for using a digitizer or editing functionality in On-Screen View and Graphical View TakeOff. If an Enterprise license is available, TakeOff will always look to it first. Keep in mind that if you have a limited number of Enterprise seats, this setting may disallow the use of a digitizer and full On-Screen View/Graphical View TakeOff functionality.

Always try to get a “PM” seat first – If you do not have a digitizer attached to your computer and do no editing in On-Screen View or Graphical TakeOff, this setting should be selected.

5. Choose the appropriate checkboxes in the **General Access Options** pane:

Can set security – Choose this checkbox to allow the employee administrator to set security in AutoBid SheetMetal. The administrator must be able to grant or remove access rights from additional employees entered in the employee list. Trimble recommends that you allow very limited access to this function or security could be severely compromised.

Can backup database – The administrator must have rights to backup the AutoBid SheetMetal database. Choose this checkbox to allow the selected employee administrator to process database backups for AutoBid SheetMetal.

TIP – The employee administrator must be allowed to perform all options in the **Security Options** window.

6. Click **OK**.

For more information about security options, see the Help.

Checking the database


Trimble recommends that you check integrity of the database on a regular basis. Checking the database integrity locates errors and broken links and automatically corrects them. *Trimble recommends that you check the database integrity on a regular basis.* This feature does not look at individual projects.

Keep in mind that the integrity check may take several hours (depending on the size of your database). It is advisable to only perform this function during a time when no one will be using AutoBid SheetMetal.

- In the ABSM DataService Manager window, choose **Tools / Check Database integrity**.

Restoring backups

To restore backups, the DataService Manager must be running as an administrator.

 **CAUTION** – All users must be logged out of AutoBid SheetMetal before restoring a database.

 **CAUTION** – There is no undo function; the current database will be overwritten.

1. In the ABSM DataService Manager window, choose **Tools / Restore Database**.
2. You will be asked to log in. The **Restore Database** window opens:
3. Select the appropriate option:
 - From Scheduled Backup** – Select a database to restore.
 - From manual backup** – Browse to the database to be restored.Valid file types are .A16, .A167, ABSM.db, QPSM.db, .qpb, and .qpb7.
4. Click **Restore**.

Setting up the Hardware

- ▶ [GTCO TabletWorks](#)
- ▶ [Smart Menu™ by GTCO](#)
- ▶ [Digitizers](#)
- ▶ [TouchMenu](#)

This chapter explains how to set up and connect the hardware required if you are using a digitizer with AutoBid SheetMetal. This is the first step towards implementing your hardware.

This chapter explains how to:

- configure your digitizer for AutoBid SheetMetal
- mount the TouchMenu
- connect the Smart Menu
- connect the MobileMenu
- set DIP Switches for older Type 5 controllers
- solve hardware setup problems.

Before you begin, you should know the following information:

- Equipment location
- How AutoBid SheetMetal is being installed (network or stand-alone)

USB adapter

If your computer comes with USB ports but does not have serial ports (legacy ports) available for use with the digitizer, you must use a USB serial adapter.

The USB serial adapter connects to the USB port on your computer. You can then connect your digitizer to the serial port located on the back of the USB serial adapter.

Install the USB serial adapter on your computer following the instructions that accompany the unit.

Once connected to your computer, refer to the [GTCO TabletWorks, page 43](#) for additional instructions.

GTCO TabletWorks

If you are using a Smart Menu™ by GTCO or a digitizer that uses a USB connection, you must download the TabletWorks software from the [GTCO website](#) and install it on your computer. This software is required on all workstations using a USB Smart Menu or digitizer. Download the software before attaching any hardware to your computer.

Install the drivers

When the download is complete:

1. Navigate to the location of the downloaded driver file. Click **Run**.
2. The routine will go through several screens. Click the **Next** button on each.
3. In the **License Agreement** screen, click **Yes**.
4. In the **GTCO CalComp TabletWorks** screen, accept all defaults and then click **Next**.
5. An informational screen displays. You can click the **Print** button for future reference or read on-screen. Click **Next**.
6. The installation routine performs several steps, including looking for previous versions of the driver.
7. In the final screen, click **Finish**. An icon will now display in the System Tray.

Smart Menu™ by GTCO

The Smart Menu is a tool for estimators. It simplifies functions and features, making them quickly accessible in the AutoBid SheetMetal software. This menu is small enough to fit inside your laptop carrying case.

- The Smart Menu you have may use a serial or USB connection.
- You can also use the Smart Menu with or without a digitizer.

This menu is available for purchase from Trimble. For more information, please contact your Trimble Sales Representative.

Serial connection

Older Smart Menus use a serial port for connection to your computer. You can connect it directly to your computer (for use with On-Screen View TakeOff) or it can be connected to your digitizer. The type of connection depends how you will use the menu in AutoBid SheetMetal.

Depending on how you will be using the Smart Menu, connect it according to the documentation included with the menu.

After you have attached the Smart Menu, you must activate it in AutoBid SheetMetal. See [Activate Smart Menu, page 45](#) for instructions.

Connect USB Smart Menu (No Digitizer)

To connect a Smart Menu to your computer without a digitizer:

1. The Smart Menu should not be connected to any device during the installation. Make sure it is disconnected (unplugged) from your computer
2. Review the connection instructions that accompanied your Smart Menu.
3. Attach the Smart Menu to a USB port on your computer.
4. Refer to [GTCO TabletWorks, page 43](#) and then [Activate Smart Menu, page 45](#) for instructions on configuring AutoBid SheetMetal to use the Smart Menu.

Connect USB Smart Menu (With Digitizer)


The Smart Menu should not be connected to any device during the installation. Make sure it is disconnected (unplugged) from your computer and digitizer.

You must also complete the following prior to completing the installation routine.

1. Power off your digitizer.
2. Disconnect the power supply from the digitizer.

3. Connect the Smart Menu to the digitizer using the phone-jack-to-phone-jack cable.
4. Connect the power supply to the digitizer and power it on.
5. With the TouchPen, press the **Reset** button on the digitizer and then CAD.
6. These buttons are located toward the top center of your digitizer.
OR
If the **Reset** and **CAD** buttons are not available on your digitizer, press **S 0 9**.
7. Connect the Smart Menu USB cable to an available USB port on your computer. See the Smart Menu Installation diagram included with your hardware.

TabletWorks Control Panel

1. Double-click on the TabletWorks icon .
2. Verify that TabletWorks recognizes the Smart Menu, and if applicable, the digitizer.
3. You might need to click **Refresh List** for TabletWorks to recognize the configuration. Ensure that no red X displays over the TabletWorks icon.
4. Verify the following:
 - If not already selected, click the **Mouse** checkbox.
 - Make sure the **TabCon** checkbox is cleared.
5. In the **Cursor Information** pane, click the **Specify a Cursor** and then select **Stylus** from the list.
6. After you have attached the Smart Menu, you must activate it in AutoBid SheetMetal. See [Activate Smart Menu, page 45](#) for instructions.

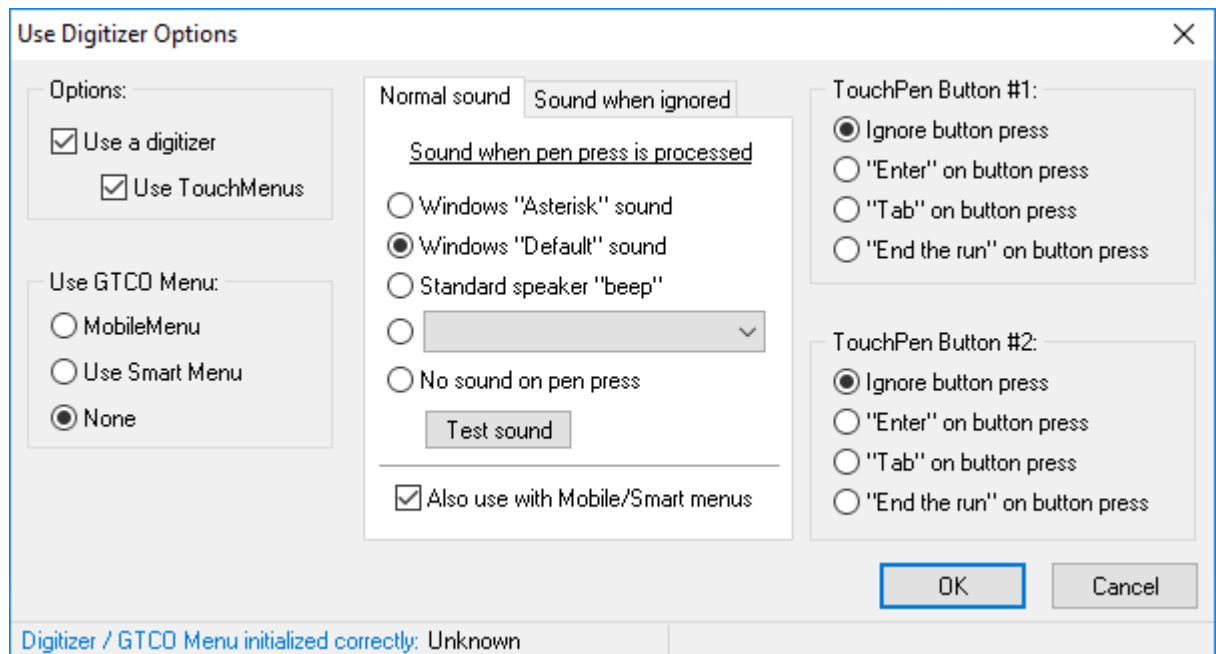
Activate Smart Menu

After you have attached the Smart Menu to your computer, you must activate it.

1. Go to the Windows Start menu and select **Trimble AutoBid SheetMetal / ABSM Utilities**.

The AutoBid SheetMetal Utilities window opens.

- Go to Tools / Set Use Digitizer/Menu Options. The Use Digitizer Options window opens.



- Click the **Use Smart Menu** option and then click **OK**.

NOTE – The Smart Menu and MobileMenu cannot be used at the same time. To use the MobileMenu instead of the Smart Menu, you must complete the process above and click the Use a MobileMenu options.


- You are now ready to begin using the Smart Menu with your AutoBid SheetMetal software.

Digitizers

AutoBid SheetMetal currently works with several GTCO digitizers:

- GTCO Super L Series
- Roll-Up digitizers
- Drawing Board Series

Attaching, configuring, and setting up each type of digitizer is covered on the following pages. To configure to work with the Smart Menu by GTCO, see [Smart Menu™ by GTCO, page 44](#).


 **CAUTION** – Attaching cables to computers/controllers and ports should always be done when the computer or power strip/surge protector is turned off. When everything is properly cabled, turn the computer or power strip/surge protector on.

USB digitizers

The instructions in this section detail how to connect digitizers using a straight USB connection. If you are using a digitizer with a Smart Menu, refer to [Connect USB Smart Menu \(With Digitizer\), page 44](#).

If your digitizer has a serial cable or you are using a USB adapter, refer to [Serial connection, page 44](#).

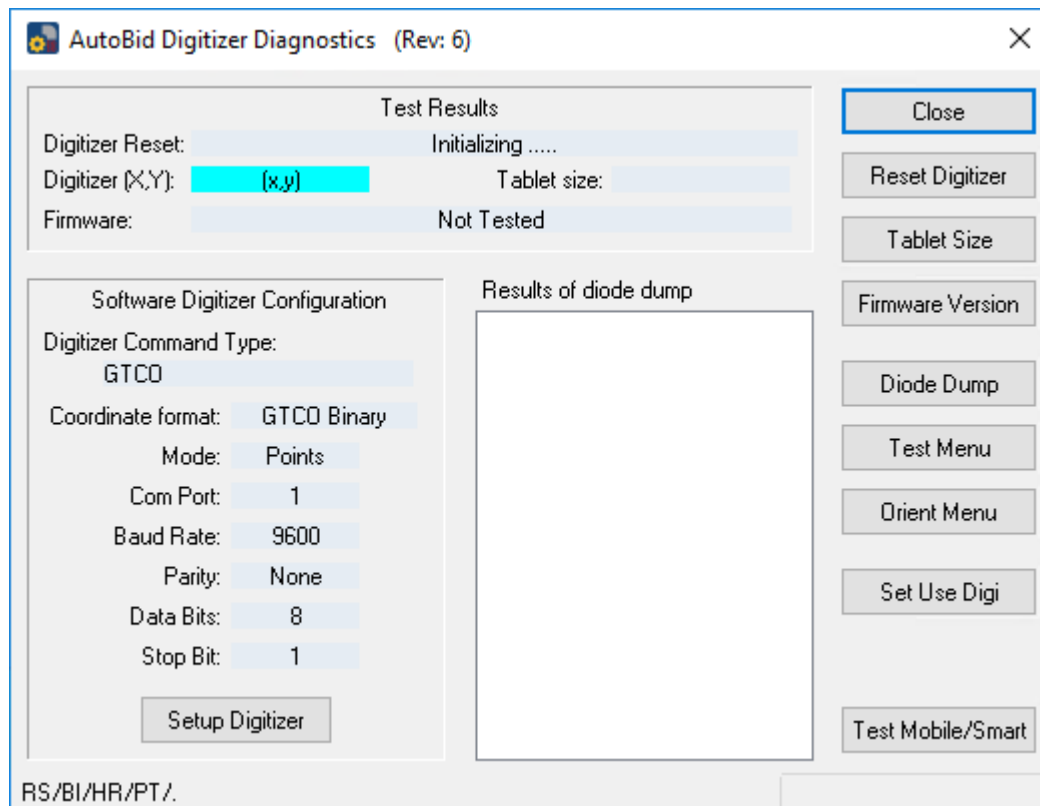
1. Connect the USB and stylus cables to the digitizer.
2. Connect the digitizer USB cable to your computer.
3. Do not connect the power supply cable (if available). The digitizer draws power from the USB connection.

 **CAUTION** – Connecting the power supply with a USB will cause a power surge to the digitizer. This may result in serious damage and loss of use.

4. If you are using a laptop computer, you may have to try different USB ports to find one that has sufficient power to run the digitizer. You may find that the ports on the back are generally better than the ports on the side.

Set up a USB digitizer

1. Open AutoBid SheetMetal Utilities and choose **Tools / Digitizer Tests**.



2. Click **Setup Digitizer**.
3. In the **Configure Digitizer Controller** window:
 - a. Click the **General** tab.
 - b. Choose the **Use WinTab drivers/Tablet Works** option and click **OK**.
4. A message displays for you to make sure your digitizer is correctly connected. Click **OK** and then close AutoBid SheetMetal Utilities.
5. Close all programs on your computer and restart your computer.
6. When the computer restarts, you may see a Found New Hardware message near your System Tray. The TabletWorks Control Panel icon  displays in the System Tray.

TabletWorks Control Panel

- a. Double-click on the TabletWorks icon.
- b. In the TabletWorks Control Panel window, clear the **Mouse** checkbox. This enables you to use the TouchPen (stylus) with your digitizer instead of the mouse. Although the mouse feature is available, using both the mouse and TouchPen may cause conflicts.
- c. Click **Apply** and then **OK**.

Serial Port Digitizers

- a. Turn your computer off.
- b. Connect the digitizer to your computer according to the directions included with your board.

Additional Steps

- a. Turn the digitizer power switch to the On position.
- b. Turn your computer back on. Your system recognizes the new hardware and updates accordingly. Note: Nothing displays on-screen during this process.

Depending on the type of TouchPen you have, it may have a red light near the top end. This is called a proximity light. To determine if the TouchPen and digitizer are communicating, hold the TouchPen above and perpendicular to the active area of digitizer. Move the TouchPen toward the digitizer until the proximity light comes on. This will normally occur when it is within an inch of the digitizer. If the light does not come on, check all connections, including the power supply.

You must now configure your digitizer and stylus (TouchPen) to work with your AutoBid SheetMetal software. Refer to [Configure digitizer, page 50](#).

Final digitizer steps

Before you can use the digitizer with the software, there are some final steps that you must complete. Because your digitizer will only have one of these options, choose the one appropriate to the type you are using.

- Touch the **EST-WIN** button on the digitizer.
- The **EST-WIN** button on the digitizer causes the digitizer and computer to communicate in the most efficient mode. You will hear four beeps when you choose **EST-WIN**.
- If you have a digitizer that has **SELECT CAD EST RESET** on the top, touch **SELECT+CAD**.

- If you have a digitizer with the **S0123456789** button panel, touch **S04**. This allows the digitizer to communicate with the software.

When you touch these options on your digitizer, you will hear four beeps. This indicates that proper configuration of the digitizer has been established. If you experience problems, contact Trimble MEP Client Services for assistance.



CAUTION – Do not choose Reset at the top of a 5-cell rigid digitizer unless directed to do so by Trimble MEP Client Services. Resetting the digitizer can cause operation and communication problems with AutoBid SheetMetal.

Test digitizer

1. Open AutoBid SheetMetal Utilities once again.
2. Choose **General / Test Digitizer**. Next to the **WinTab Connection** field, you should now see the message **Connection Successful**.
3. Touch your pen anywhere inside the active area of the digitizer. The **Test WinTab Connection** window will display your coordinates and position on the board. Click **Close**.
4. Open TakeOff, orient your TouchMenu and align the drawing. You can then process a TakeOff.

For more information on these procedures, see the online help system.

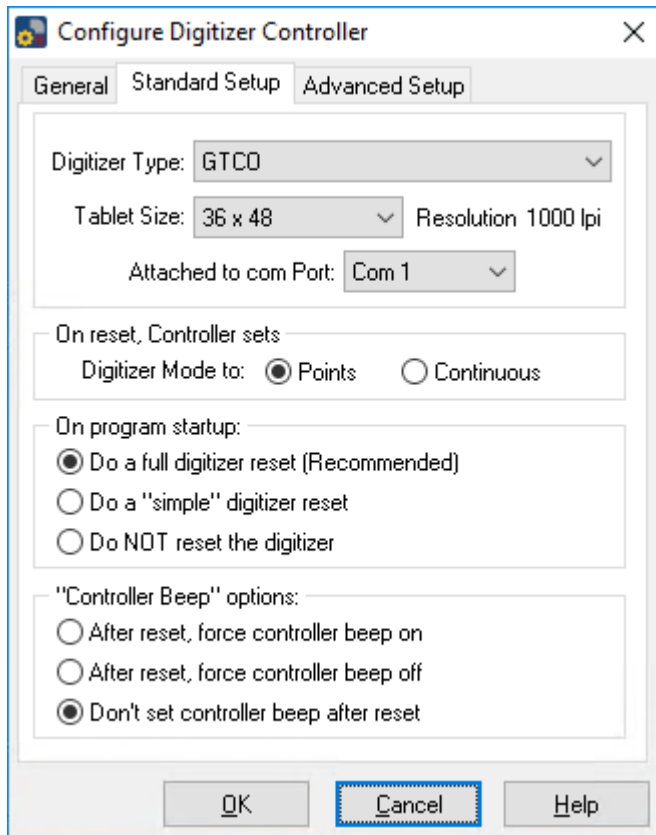
Configure digitizer

Proceed with the following instructions to configure the digitizer to communicate with your AutoBid SheetMetal system.

TIP – You generally need to set up the digitizer only one time. Once the settings are selected, they will remain in place until you manually change them.

1. From the Windows Start menu, navigate to **Trimble AutoBid SheetMetal / ABSM Utilities**. The AutoBid SheetMetal utility opens.
2. Choose **Tools / Digitizer Tests**.
3. The current settings for the digitizer are displayed in the **Software Digitizer Configuration** pane.
4. Click **Setup Digitizer**. The **Configure Digitizer Controller** window displays.
5. The Digitizer Setup options are preset to the defaults. You do not need to modify these settings unless your computer system requires different settings. Complete the following as needed:

Standard Setup



Digitizer Type – If you have more than one type of digitizer installed, choose the digitizer you want to use from the list. For most digitizers, the selection will be GTCO. For Drawing Board III, select CalComp 9100.

Tablet Size – This field allows you to define the size of your digitizer. Select the appropriate size from the list.

Attached to COM Port – Choose the appropriate COM port your digitizer will use. You may need to cycle through the list to locate the port set up for your computer.

On reset, Controller sets – These settings depend on what type of digitizer you are using. Choose one of the following options:

Points – Choose this option if your digitizer is one of the following:

- Super L series digitizers with the EST-WIN setting
- Roll up digitizers using S04 setting

Continuous – Choose this option if your digitizer is one of the following:

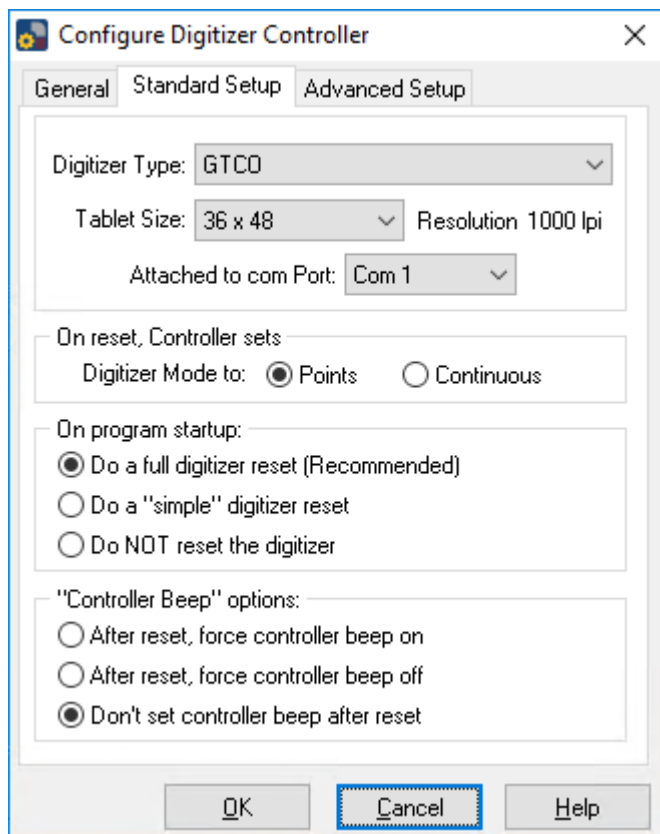
- Existing Super LII digitizers with the SELECT/CAD setting

- Older 5 and 5a controllers where you physically change the DIP Switches

On program startup – Click **Do a full digitizer reset (Recommended)**. Additional options are available for selection. To ensure your digitizer is working properly every time, Trimble recommends that you select this option.

"Controller Beep" options – Choose one of the available options.

Advanced Setup



Digitizer Tablet – Choose Inches or Millimeters, depending on which units you use.

Tablet Width – Enter the Tablet Width of your digitizer.

Tablet Height – Enter the Tablet Height of your digitizer.

The above options pertain to the active area of your digitizer and not the total size of the board.

COM Port Settings – Do not change this setting from the default.

Reset Delay ____ Seconds – Enter the delay from the reset operation to when the digitizer is activated.

6. Click **OK** when you are done.

7. You will be prompted to reset the digitizer after clicking **OK**. Click **Yes** in this dialog.

OR

In the **AutoBid SheetMetal Digitizer Diagnostics** window, choose **Reset Digitizer**. The results of the test are displayed in the **Test Results** pane.

Other Digitizer/TouchMenu Options

The AutoBid Digitizer Diagnostic window includes additional options that, from time-to-time, may prove helpful when using your digitizer.

Reset Digitizer – Choose this button after you have selected the settings for your Digitizer under the SetUp Digitizer button. This tests your settings and displays a message if the reset is successful.

Tablet Size – Choose this button to view the size of your digitizer tablet.

Firmware Version – To view the type of Firmware your digitizer uses, choose this option.

Diode Dump – This option should be used with the assistance of Trimble MEP Client Services. Support uses the information produced by this test to assist you with certain problems.

Orient Menu – Click Orient Menu so AutoBid SheetMetal recognizes that the menu exists. The Orient TouchMenu window displays.

Follow the on-screen instructions to complete the orientation of the TouchMenu.

Test Menu – Click Test Menu to verify that the TouchPen and TouchMenu are communicating properly. The Test Menu window displays. Results of the test display in this window.

TouchMenu

The TouchMenu is used with the digitizer during TakeOff. Using a TouchPen, you touch cells on the TouchMenu and then points on the drawing. The information is entered into AutoBid SheetMetal. The TouchMenu is shipped with your digitizer.

Cells on the TouchMenu (TouchBoxes) are named for the various functions they perform.

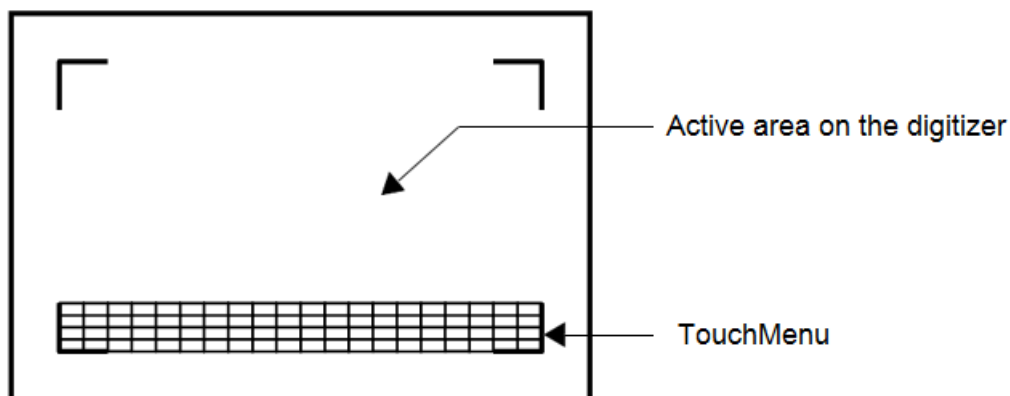
- Items to take off drawings, such as pipe, fittings, or equipment
- Commands to process TakeOff data, such as printing or saving
- Toggles to change settings, such as turning on and off the automatic calculation of insulation on items.

Other TouchMenu functions include a numeric keypad and arrows that allow you to move the cursor throughout TakeOff. Cells with similar functions are grouped together.

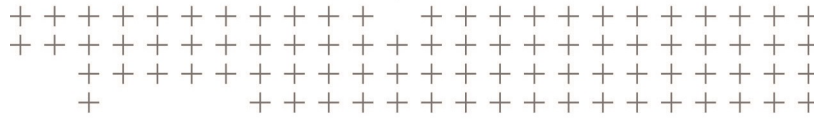
Mount TouchMenu

Before you can use the TouchMenu, it must be correctly mounted on the digitizer. To do this:

1. Attach the TouchMenu holder frame so it is in the digitizer's active area. You can use double-sided tape to help you position the frame properly.
2. Place the TouchMenu inside the holder. The graphic below illustrates proper positioning.



3. You must now configure the digitizer to work with AutoBid SheetMetal. See [Configure digitizer, page 50](#).



Default Passwords

DataServer Initial Password

SQL

AutoBid SheetMetal Initial Password

Admin

Trimble recommends you change the initial password as soon as possible after installation (see [page 37](#)). Doing so will prevent access to the database by unauthorized individuals.