



AutoBid Mechanical

SOFTWARE

INSTALLATION GUIDE

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Legal Notices

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Release Notice

This is the September 2017 release, revision A of the AutoBid Mechanical Installation Guide. It applies to the AutoBid Mechanical software.

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Overview/Requirements

- ▶ [Software overview](#)
- ▶ [Installation requirements](#)
- ▶ [Preliminary installation requirements](#)

The Trimble® AutoBid® Mechanical solution speeds up takeoff and bid prep time, driving productivity and efficiency. Generate precise results you can trust—and have the time to fine-tune your proposal. Reduce the chance of errors by taking advantage of automatic fitting generation or even adjust for elevation changes.

Software overview

As a piping and plumbing estimator, you know what a challenge it can be to deliver accurate estimates in a timely manner.

The easy-to-use features let you instantly make changes, correct errors, process addenda, and create change orders. Do you want to compare materials or produce value engineering scenarios? The tool's advanced analysis software lets you substitute materials and specifications to prepare what-if scenarios and to value engineer the optimal solution for you and your client.

Also, take advantage of customized TakeOff tools, automatic price updates on more than 50,000 different items, patented on-the-fly algorithm, and labor books containing MCAA and PHCC labor units — just a few of the many powerful features designed to help you develop competitive piping and plumbing bids.

An estimate is only as good as the data in your estimating system. By working with material pricing from Trade Service or other pricing services, Trimble AutoBid Mechanical ensures that you have the most up to date pricing from today's manufacturers, giving you confidence in your numbers.

The power of a good estimate — and estimating system — goes beyond the proposal. That's why Trimble AutoBid Mechanical software includes a powerful data export wizard and seamless integration with Trimble's 3D CAD software.

Installation requirements

Windows Operating system updates

To successfully install this AutoBid Mechanical software update, you must be up-to-date with all Microsoft® Windows® operating system updates. If a reboot of your system is necessary after Windows updates have been installed, you must perform this function before starting the AutoBid Mechanical installation procedures outlined in this document.

Trimble Quick Link

TIP – You must install the Trimble Quick Link software before installing AutoBid Mechanical software. If you have other Trimble applications using the licensing utility, you do not need to install another Hub; however, you must install the release of Trimble Quick Link included with AutoBid Mechanical (as an update) to ensure proper functionality.

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

The Trimble Quick Link application has two modules available.

- **Trimble Quick Link Hub**

You must install the Trimble Quick Link Hub before you install the AutoBid Mechanical application. The Hub serves as the central communication link between the AutoBid Mechanical software and Quick Link Central (licensing server) located in our corporate offices.

TIP – Trimble recommends that the Trimble Quick Link Hub be installed in a location easily accessible by all who need to use AutoBid Mechanical.

- **Trimble Quick Link Management Studio**

- The Quick Link Management Studio allows you to manage your licenses from one convenient location.
- You should limit the number of Management Studio installations within your organization. This ensures licensing is managed in the most efficient manner.

TIP – Trimble recommends that you install at least one copy of the Management Studio at each of your company's physical locations.

Preliminary installation requirements

- You *must* have administrator privileges in order to install the software.
- It is your responsibility to install the required software (and connect the hardware, if necessary).

⚠ CAUTION – 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.

- **Trimble Quick Link Video** – The installation media includes a video introducing the Trimble Quick Link software and how it improves licensing and communication for your Trimble product. We strongly recommend that you view this video before installing AutoBid Mechanical.

Trimble Quick Link

- ▶ [Trimble Quick Link Software modules](#)
- ▶ [Recommendations/First steps](#)
- ▶ [Quick Link Hub](#)
- ▶ [Quick Link Management Studio](#)


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

Trimble Quick Link Software modules

Trimble Quick Link has two modules available.

- [Quick Link Hub](#)

This module is required for communicating with Quick Link Central (licensing server). See [Quick Link Hub, page 8](#) for more details on the hub.

 **CAUTION** – Prior to installing the Trimble Quick Link software modules, you should verify whether the Quick Link Hub is already installed somewhere on your network. If you are not certain whether the Quick Link Hub is installed, you may contact your IT Professional for assistance.

- [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 limit the number of management studios installed at your location. See [Quick Link Management Studio, page 10](#) for more information on this module.

Recommendations/First steps

To ensure proper operation of the Trimble Quick Link software after installation, follow the steps below.

Setup steps

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

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

- We recommend that you install the Trimble Quick Link Hub in a central location where all AutoBid Mechanical software stand-alone and workstation software installations can easily connect.
- *Server 2008* and *Server 2008 R2*: You may need to enable the .NET Framework 3.0 Features in the Server Manager.
- *Server 2012*: You may need to enable the .NET Framework 3.5 Features in the Server Manager.

TIP – Contact your IT Professional if you need assistance with the processes above.

Insert installation media

Insert the AutoBid Mechanical software installation media into the appropriate drive of the computer designated as the stand-alone or server computer. Wait a moment.

If the installation does not start a few seconds after you insert the installation media, proceed as follows:

- Double-click on the **Computer** Desktop icon.
- Locate the drive containing the AutoBid Mechanical software installation media. Click on it to display the contents of the media.
- Double-click *AutoRun.exe* to open the AutoBid Mechanical software main installation screen.

NOTE – Depending on your computer settings, the file extension (.exe) may not display.

Trimble Quick Link video

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

- In the main AutoBid Mechanical 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  on your Taskbar.

Quick Link Hub

The Trimble Quick Link Hub provides communication with the Trimble licensing server.

- 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 Technical Support for further instructions. You must have access to e-mail to use this option.
- Trimble recommends that you install the Hub on a computer that can be accessed by all Trimble software applications.
- Only *one* installation of the Hub is required for *all* Trimble applications.
- If your company has multiple locations using Trimble software applications, you can install one hub to share licenses across locations provided that each location can connect to the hub and that all locations are on the same domain.

- If your computer with an AutoBid Mechanical Stand Alone installation is not connected to a network at all times, you may wish to install a dedicated Hub on your local machine. Installation of a dedicated Hub will also enable you to check out a license from a network QuickLink Hub when you need to work remotely.

Hub installation

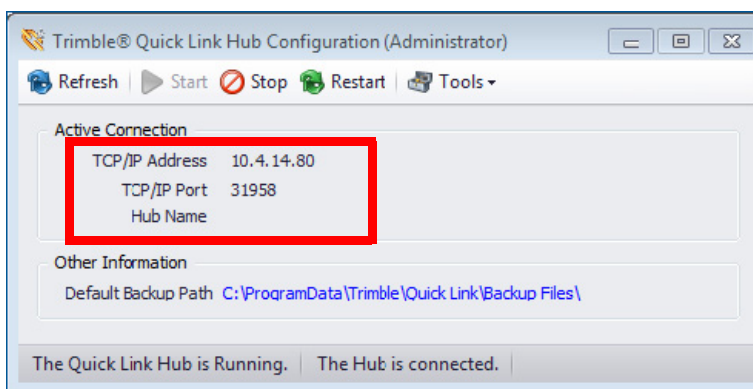
⚠ CAUTION – Prior to installing the Trimble Quick Link software, you should verify whether the Quick Link Hub is already installed somewhere on your network. In case you are not certain whether the Quick Link Hub is installed, you may need to ask your IT Professional for assistance in locating it.

On the main AutoBid Mechanical software installation screen, proceed as follows:

1. Under **Software Installation Links**, click **Trimble Quick Link**.
2. Review the information on the Quick Link screen and then 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**.

TIP – You must accept the terms of the agreement to proceed with the installation. If you want a hard copy of the agreement, 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**. 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 *IP Address* and *Port* for the computer where the software is installed. You need this information when configuring the AutoBid Mechanical software for communication with the Trimble Quick Link application. Also, you need this information if you are installing the Management Studio.



Quick Link Management Studio

TIP – Trimble recommends that you limit the number of Management Studio installations within your organization. This ensures licensing is managed in the most efficient manner.

1. Click **Quick Link Management Studio**. The routine prepares the files for installation.
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**.

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

4. In the **Choose Destination Location** screen, click **Next**. Trimble recommends that you accept the default location.
5. In the **Ready to Install the Program** screen, read the information provided. When you are ready to begin the procedure, click **Install**.
6. Click **Finish**. Refer to the [Getting Started](#) chapter in this manual for information on configuring the Management Studio. No action is required at this time.

[Return to Main Page](#)

In order to install the AutoBid Mechanical software, click Back to Main screen and then refer to AutoBid Mechanical Software chapter for instructions.

AutoBid Mechanical Software

- ▶ [Insert media](#)
- ▶ [Installation procedures](#)
- ▶ [Additional software/information](#)

AutoBid Mechanical can be installed on a network or on a stand-alone, single-user computer.

- The program uses Microsoft SQL Server to manage your data.
- The Trimble Quick Link communication and licensing software is required.

To ensure proper behavior of the application, please follow all of the procedures as outlined in this chapter.

Insert media

TIP – To successfully install this AutoBid Mechanical software update, you must be up-to-date with all Windows updates. If a reboot of your system is necessary after Windows updates have been installed, you must perform this function before starting the AutoBid Mechanical installation procedures outlined in this document.

Insert the AutoBid Mechanical Installation media into the appropriate drive of the computer you are installing the software on. Wait a moment.

If the installation does not start a few seconds after you insert the installation media, proceed as follows:

- Double-click on the *Computer* icon on your Desktop.
- Locate the drive containing the AutoBid Mechanical Installation media. Click on it to display the contents of the media.
- Double-click *AutoRun.exe* to open the AutoBid Mechanical main installation screen.

NOTE – Depending on your computer settings, the .exe file extension may not display.

Installation procedures

TIP – You must have the TCP/IP Address and TCP/IP Port for the Quick Link Hub. If you have not yet installed the Trimble Quick Link software, you must do so before you can install AutoBid Mechanical.

To install AutoBid Mechanical, proceed with the following instructions.

1. In the **Software Installation Links** area, click AutoBid Mechanical.

Trimble has built-in several validations to ensure Trimble Quick Link and AutoBid Mechanical 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:

Hub Address

This is the TCP/IP Address assigned to the Quick Link Hub.

Port

This is the TCP/IP Port assigned to the Quick Link Hub. The default Port should always be 31958.

Click **Continue**.

Validation procedure

When you click Continue, the application validates the installation and communication with the Quick Link Hub.

- If the installation/communication is validated, the installation will continue. Go to Step 1 under [Continue installation](#).
- If installation/communication cannot be validated, you will receive a message. Click **Go Back** and make sure you have entered the correct information. Make any necessary corrections and then click **Continue** again. Go to Step 1 under [Continue installation](#).

TIP – If you have entered the correct information but the data cannot be validated, you will need assistance from your IT professional. Trimble has provided an Installation Checklist document to step through some troubleshooting procedures.

Continue installation

1. The Welcome to the Installation Wizard for AutoBid Mechanical screen displays. Click **Next**.
2. The License Agreement displays on the screen. Read the agreement. Click **I accept the terms of the license agreement** and then click **Next**.
3. The Support Agreement displays on the screen. Read the agreement. Click **I accept the terms of the support agreement** and then click **Next**.

TIP – 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.

- In the **Select Install Type** screen, choose the appropriate option button based on the type of installation you want to perform. Refer to the information in the tables below for an explanation and instructions for each installation type.

Workstation

TIP – If you are installing as a workstation, you must install the software on the server as well. See DataServer: Database and Tools section below.

Selecting this option provides access on the installation computer to both the AutoBid Mechanical and Takeoff modules in AutoBid Mechanical.

- If this is the type of install you wish to perform, select the radio button and then click **Next**.
- In the **Choose Destination Location** screen, click **Next**. Trimble recommends that you accept the default location.

DataServer: Database and Tools

This option is for network installations where multiple users will be accessing the application. With this option, you cannot use the application at the server.

- If this is the type of install you wish to perform, select the radio button and then click **Next**.
- In the **Choose Destination Location** screen, click **Next**. Trimble recommends that you accept the default location.

Stand-Alone: Installation of all Features

This option installs all features on the computer.

- If this is the type of install you wish to perform, select the radio button and then click **Next**.
- In the **Choose Destination Location** screen, click **Next**. Trimble recommends that you accept the default location.

- The **Ready to Install the Program** screen, click **Install**.

Microsoft SQL Server Express

AutoBid Mechanical requires Microsoft SQL Server or Microsoft SQL Server Express. The installation routine will attempt to locate the Microsoft SQL Server application on your computer. If the necessary application is not found, the install will automatically launch the Microsoft SQL Server Express install. *Please be patient as this process will take some time to complete. Do not click Cancel during this process.*

Microsoft SQL Server Express should be able to accommodate most databases. If you keep a very large number of projects and your database exceeds the maximum allowed size, you will need to upgrade to Microsoft SQL Server. Please contact Trimble MEP Client Services if you believe that you will need to upgrade.

Complete Installation

When installation is complete, click **Finish**.

Additional software/information

PDF Viewer

The AutoBid Mechanical software includes various manuals available in a Portable Document Format (PDF). In order to view these documents, a PDF Viewer is required.

TIP – If you are using a Windows 8 Operating System or newer, a PDF Viewer is automatically included. Installing a PDF Reader is not required. If you do not have this software on your computer, you can find a free download of Adobe Reader at www.adobe.com

Licensing and database access

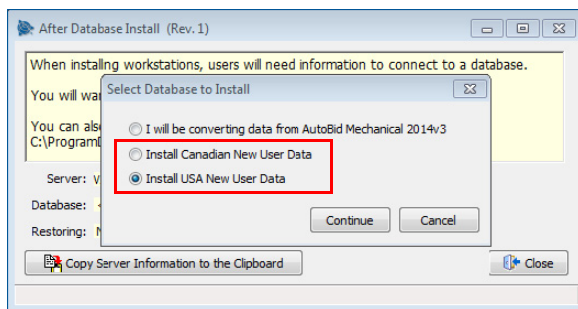
To license your AutoBid Mechanical software and learn how to start using the application, refer to the [Getting Started](#) chapter for detailed information.

Master data (Stand-Alone/Server installations)

You will be presented with a dialog to install your Master Data.

1. Select the appropriate option button based on your location and the types of projects you work on.

TIP – For new user installations, do *not* select the conversion option. This is for customers updating from a previous version.



Getting Started

- ▶ [Configuration/Hardware/Training](#)
- ▶ [Trimble Quick Link Configuration](#)
- ▶ [Open software](#)
- ▶ [Main window](#)

When you complete the installation of your AutoBid Mechanical software, there are a few additional steps before you are ready to run the program.

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

- [Configuring Trimble Quick Link](#)
- [Connecting to the AutoBid Mechanical Database](#)
- [Attaching/configuring any required hardware](#)

Before you proceed with the directions contained in this chapter, make sure you have installed all required software as outlined in the [AutoBid Mechanical Software](#) chapter of this manual.

Configuration/Hardware/Training

Trimble Quick Link

The Quick Link software application provides licensing for the AutoBid Mechanical software. Refer to [Trimble Quick Link Configuration, page 16](#) for detailed instructions.

Smart Menu® by GTCO

If you purchased hardware to use in conjunction with the AutoBid Mechanical application, it must be set up. Refer to our website under [Support / Common Issues / Trimble AutoBid Mechanical](#) for instructions.

Training

In order to optimize your use of the AutoBid Mechanical application, contact our Training Sales Coordinator at (888)695-4714 or by e-mail at meptraining@trimble.com.

You can also view training information on our website (mep.trimble.com). Click **Education & Training** and then click **Product Training** on the menu. A complete list of product training available is listed on this page. When you click on a product, you can view upcoming training classes.


Trimble Quick Link Configuration

TIP – In order to complete the wizard, you must have the activation code sent to you previously by email. If you do not have this code, please contact MEP Client Services before continuing.

Before you can use the Trimble Quick Link Management Studio, it must be configured to communicate with the Hub. The Management Studio also allows you to obtain licensing for the AutoBid Mechanical software through the Quick Link Server program. You must obtain licensing before you can use the AutoBid Mechanical software.

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**. See the Trimble Quick Link online help system for instructions.

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

Click  on your Desktop.
OR

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

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

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

Login Name

admin

Password

admin

TIP – Trimble recommends that you change the password for the default login as soon as possible in order to protect your data. Make note of the new password.

3. If you want 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). It is highly recommended that the default Port number is used. Contact your system administrator for more information.

5. Click **OK**. The **Quick Start Wizard** opens. This wizard guides you through setting up the Management Studio for proper licensing and communication. Refer to the Trimble Quick Link online help system for instructions on completing the wizard.

Open software

1. Open the AutoBid Mechanical software application:

Stand-Alone/Workstation

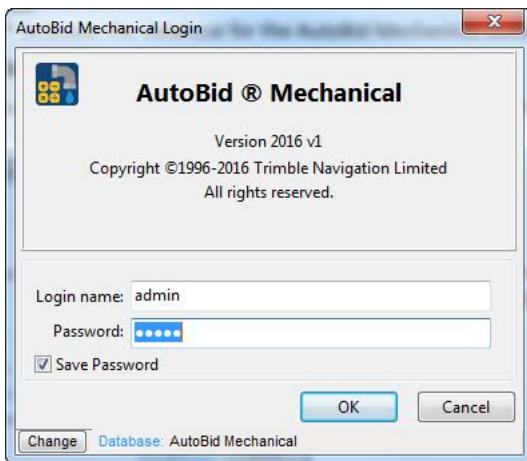
Click  on your Desktop.

OR

Start menu: Navigate to **Trimble AutoBid Mechanical** and then click on AutoBid **Mechanical**.

2. *Workstation Customers*: Before completing the steps below, you should have the server name available before completing the steps below to ensure you are connecting to the proper database. Information about this database was provided during the database installation. If you are unsure of the database location, please contact your IT Professional for information.
 - a. In the **Add Database Connection** dialog, review/select the following:
 - Name** – Enter a name for this connection.
 - Server** – If the server is detected on the computer where you are working, it will display in the field. If the field is empty, click ▼ to select the appropriate server from the list. If your server is on a network, you must know the name to make the connection.
 - Login** – You may either login using your Windows login or use SQL Authentication. This provides enhanced security for your database.
The login information below pertains to the Trimble installed instance of the Microsoft SQL Server. If you are using another instance, your login will be different. Contact your IT Professional if you have any questions.
Login: sa
Password: Trimble1
 - SQL Server Version** – This field defaults to <Auto Detect>. Do not change this value unless directed to do so by Trimble MEP support.
 - Database** – Click ▼ to locate the database for the AutoBid Mechanical software.
 - b. Click **OK**.

3. Login to the AutoBid Mechanical software using the credentials in the [Default Passwords](#) topic (at the end of this guide).

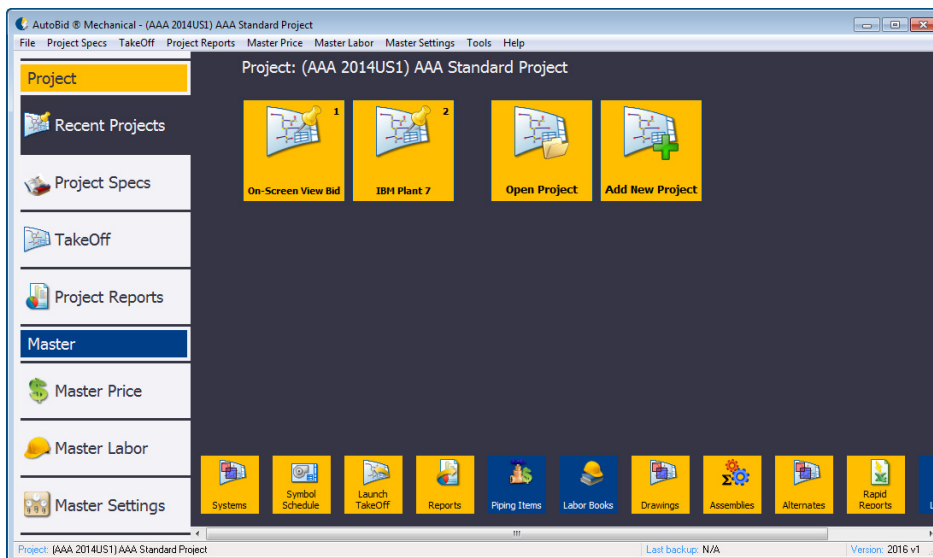


TIP – If you want to save the password for future sessions, click the **Save Password** checkbox. While this allows you to open the database without password entry, it provides less security for your important data. Trimble recommends that you change the default password as soon as possible. See the topics in the online help file under **Employee Security and Access** for more details.

4. Click **OK**.

Main window

The AutoBid Mechanical software window is the primary access point to the modules in the software.



The main window provides you with easy access to the various AutoBid Mechanical software modules using a graphical interface. As you click on the module buttons on the left side of the screen, the right side of the screen displays associated options. For more detailed information, refer to the online help system.

Program Assistance

- ▶ [Help system](#)
- ▶ [Online manuals](#)
- ▶ [Video Presentations](#)
- ▶ [Trimble MEP Client Services](#)

Obtaining information is important when you are working in any software package. AutoBid Mechanical provides online documentation and videos that can be directly accessed from within the software.

This chapter explains the organization and content of the documentation. Directions are also included on accessing the documentation.

Help system

Accessing online help can be done from the **AutoBid Mechanical** main software window or the **AutoBid Mechanical TakeOff** window.

You can also press the **[F1]** key in most windows to take you immediately to the help topic.

Online manuals

The AutoBid Mechanical documentation is organized by topic into the following categories.

- *Installation*
Contains information on installing AutoBid Mechanical, initial access to the database and installing master data.
- *Getting Started Guide*
The Getting Started Guide contains exercises that you should complete before you attend the AutoBid Mechanical software training provided by Trimble. A hard copy of this manual is also provided with your software.
- *Master Settings and System Maintenance*
This manual includes an introduction to the software, system security for the database, detailed information on how to use the AutoBid Mechanical online documentation system. Backing up and restoring AutoBid Mechanical is also explained.
- *Price and Labor*
Contains the information you need to create price and labor tables, including how to use various compatible pricing services.

- Projects and Specifications

This manual contains the information you need to create a project, including setting up your scopes and specifications.

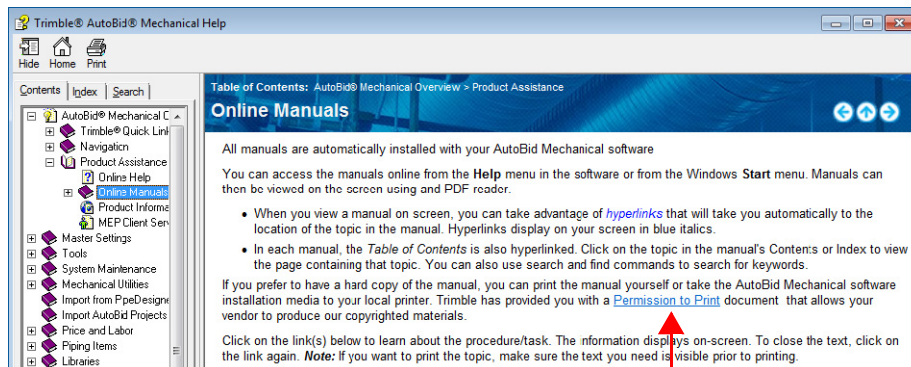
- TakeOff and Reports

This contains the information you need to process a take off and produce reports.

You can access all manuals online from the **Help** menu in the software. The manual can be viewed on the screen. This allows you to take advantage of the hyperlinks. Hyperlinks are displayed on your screen in **blue italics**. Clicking on **hyperlinks** will take you directly to that information.

Manuals are automatically installed with your AutoBid Mechanical software.

If you want professionally bound hard copies, see the **Permission to Print** document in the online help file.



Click the Permission to Print link.

This document contains all the information a printer needs to professionally produce printed and bound manuals. Keep in mind that the manuals are updated all the time. If you print and bind the entire manual, your copy will be obsolete the next time you receive a software update.

Trimble suggests that you follow the instructions included on the following pages to open the online manuals. This will allow you to see how easy it is to use manuals online.

Manuals from the Start Menu

To open the online manuals from the **Start** menu, perform the following steps.

1. Choose the **Start** and navigate to **Trimble AutoBid Mechanical**. Depending on the operating system you are currently using, you may need to click on **Documentation** to obtain the manuals.
2. Click on the appropriate manual.

Manuals from the Help Menu

To open the online manuals from the **Help** menu, perform the following steps.

1. In the AutoBid Mechanical main software window, choose **Help > AutoBid Mechanical Manuals**.
2. Click on the appropriate manual.

Video Presentations

The AutoBid Mechanical software includes video presentations that explain certain features and functions of the application. Two types of videos are available with the AutoBid Mechanical application.

- 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.

TIP – You must have internet access to view the videos.

Trimble MEP Client Services

TIP – You can send a message directly to MEP Client Services by going to **Help / Send message to Technical Support**. This feature allows you to describe your issue, as well as attaching a screenshot.

- Before calling Client Services, we suggest you consult the online help. Many of the common procedures and questions are covered in this system.
- Trimble MEP Client Services is available during regular business hours Monday through Friday.

NOTE – We are not available on major holidays.

Toll-free Telephone	1-800-234-3758
E-mail	mepsupport@trimble.com
Website	mep.trimble.com

Third-party software support

Trimble software may be integrated with third-party software applications (for example, accounting programs). Trimble MEP Client Services cannot provide in-depth support for third-party applications. Assistance is available only for procedures pertaining to how our software interfaces with non-Trimble applications.



Default Passwords

AutoBid Mechanical default login

Login Name

admin

Password

admin