INSTALLATION GUIDE

Trimble® Field Points Software

Trimble

Installation Guide

Trimble®
Field Points
Software

Revision A_ENG

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Release Notice

This is the Trimble® Field Points software INSTALLATION GUIDE. (Revision A).

The topics within this manual are:

- Subject to change without written notice.
- Companies, names, and data used in any examples are fictitious.
- Screenshots included in the help topics may not be exactly as in the software application.

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Contents

1 Introduction 5

Overview 6
Preliminary Steps 6
Compatible Autodesk Application(s) 6
Software Download 7
Software Licensing 7
Additional Information 8

2 Installation Procedures 9

Software Installation 10
License Manager Software 11
Trimble Field Points Software 12

3 Getting Started. 14

Open Software 15
Default Settings. 15
License Manager 17
Software Assistance 19
Online Help System 19
Trimble Field Points Support 21

4 License Conversion. 22

Overview 23
Preliminary Requirements 23
Activation Email 23
Download Software 23
Installation/Conversion Procedures. 23
License Environment 23
Software Installation 24
Verification 24

CHAPTER 1

Introduction

In this chapter:

- Overview
- Preliminary Steps

This manual includes:

A brief overview of the Trimble Field Points software application.

- Preliminary steps required prior to installing the software application.
- Instructions on installing the Trimble Field Points software.
- It also includes the steps required before you start working in the application.

Tip – Trimble recommends you review all chapters of this manual before you begin the installation process.

Note – *This publication assumes that you know how to use the Windows® operating system. If you do not, contact your computer vendor or local community college for information on classes available.*

Overview

The Trimble Field Points software application provides a CAD solution to designers needing to pinpoint various design objects in the field. Field points can be created in a drawing and then exported for layout use in the field. Field points can be created, recorded, and modified for import into the originating drawing to document exact project data.

Created by industry specialists, this software is compatible with various compatible Autodesk® applications to enable you to design, create and “round-trip” field points quickly and efficiently.

Refer to the system specifications posted on the Trimble Field Points download page on our website for more information on software compatibility and computer specifications.

Supported Languages

The Trimble Field Points software supports additional languages (other than English). The installation routine installs the appropriate language pack based on the language pack used in your AutoCAD or Revit software.

- French
- Italian
- German
- Korean
- Simplified Chinese
- Spanish
- Portuguese

Tip – While the software supports additional languages, help and technical support for the application is available in English only.

Preliminary Steps

You must perform the following steps prior to installing the Trimble Field Points software.

Compatible Autodesk Application(s)

Prior to proceeding with the Trimble Field Points program, you must have the compatible Autodesk® application installed and authorized on your computer. Refer to the Technical Specifications posted on the our website (mep.trimble.com) for the compatible Autodesk® products.

Verify Autodesk Software Version(s)

Trimble recommends that you verify the Autodesk software versions you currently have installed on your computer before proceeding.

Backward Compatibility

The Trimble Field Points software is not backward compatible. The Trimble Field Points release must correspond with the Autodesk compatible version.

Note – *If you have multiple compatible versions of AutoCAD or Revit installed on the same machine, you can also install the corresponding Trimble Field Points software. Keep in mind that the software is one-to-one; you cannot have multiple versions of the Trimble Field Points software installed for the same AutoCAD or Revit version.*

Software Download

The Trimble® Field Points software is available by a download. Before proceeding, make sure you have downloaded and unzipped the proper files:

- The ***License Manager*** software (required)
- Depending on the Autodesk platform(s) you will be using, you must download one (or both) of the following:
  - TFP_AutoCAD.zip
  - TFP_Revit.zip

The downloaded files are in zip/compressed format. You must unzip the files before installing the software. The instructions in this document assume you have downloaded and unzipped the necessary files.

Tip – When you unzip a file, there will be one or more Trimble Field Points installation files included. Please make sure you are install the proper Trimble Field Points software based on your AutoCAD® or Revit® software version.

Note – *If you are installing with a media file (DVD or flash drive), and need assistance, please contact Trimble Field Points technical support at 1-800-234-3758.*

Software Licensing

Licensing of the Trimble Field Points software is accomplished through a third-party licensing application. This application requires an activation code to allow licensing of your software product. This code was sent to you by email upon completion of the software sale.

You must have this code available in order to use the Trimble Field Points software application. If you do not have this code, please contact Trimble Field Points support at 1-800-234-3758 before proceeding with the installation.

Tip – If you are installing the License Manager software in a central location, you must also have the name for that computer available. This information is required for entry when installing the Trimble Field Points software on workstations. Refer to the table below for more information on types of licensing installation available.

Important Note

The licensing program uses **Port 5053** by default. This port must be open before installing the software to ensure license communication is achieved. Contact your IT Professional if you need assistance with this procedure.

Determine License Environment

You can install the License Server in a network or central location or in a local or stand-alone (one license to one Trimble Field Points installation) environment. The table below provides information on the advantages/ disadvantages to each installation type.

Type	Advantage	Disadvantage
Central License Server	• Multiple workstations pull licenses from a central location. • Allows license access for several workstations simultaneously. • Roaming licenses are available, allowing you to “check-out” licenses to use the software offsite. • You can return a Trimble Field Points license and continue working in the AutoCAD or Revit application. This makes the Trimble Field Points license available for others to use.	• All workstations must have proper security rights to connect to the license server software. • License Server may become unavailable in the event of a computer/server failure where the licensing software is installed. • Depending on the number of workstations with the Trimble Field Points software, all licenses may be in use, preventing access for additional workstations.
Local License Server	• License is always available for the stand-alone installation of the Trimble Field Points software.	• Licenses cannot be “lent” to other users/workstations. • Only the current workstation where the license is installed can use the license. • Only one license is available.

Additional Information

In order to perform the installation, you must have local administrative rights for the computer on which the application is being installed. If you have any questions, please discuss with your IT professional.

- Before you install the software, take the following action.

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

- You must be logged in as administrator to install the License Manager application.

CHAPTER 2

Installation Procedures

In this chapter:

- Software Installation
- License Manager Software
- Trimble Field Points Software

The Trimble Field Points software can be installed in a stand-alone, single-user computer.

Tip – The Trimble Field Points software can be used only in stand-alone mode, in conjunction with your compatible Autodesk product.

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

Software Installation

The Trimble Field Points software includes the following:

- **License Manager**
  The Reprise License Manager must be installed in order to license the Trimble Field Points software application.

  Note – *Before installing the software, you must determine the environment in which you will be using the licensing software. Refer to the table on page 8 for more details.*

  – ***License Server*** *(central location):* Installing the License Manager on a network license server (or other computer designated as a license server) allows you to point all workstations to a central licensing location.

  Tip – This is the most efficient method for licensing your product as it provides the greatest flexibility.

  – ***Local or Stand-Alone Computer***: You can also install the License Manager on a stand-alone computer, allowing a one-to-one software/license relationship. ***Note:***

  CAUTION – Do not install the License Manager on a stand-alone computer if you are storing licenses in a central location.
- **Trimble Field Points-[Autodesk Product] [Version #]**
  This routine installs the Trimble Field Points software on your computer. The Trimble Field Points software must be installed ***after*** you have installed the License Manager. You will be prompted to enter the server or computer name in the installation procedure.

The topics on the following pages provide step-by-step instructions on installing both software applications.

Common Installation Commands

During the installation process, you will see the following in many of the windows.

- To proceed with the installation and advance to the next window, click **Next**.
- If you want to return to the previous page, click **Back**.
- If you want to discontinue the installation, click **Cancel**. You will be asked to confirm the cancellation. Click **Yes** if this is your intent. If you pressed the Cancel button in error, click **No** and the installation will continue.
- **Finish** completes the installation.

The next topics step you through the software installation process.

License Manager Software

The License Manager is required for licensing your Trimble Field Points software. Keep the following in mind when installing the License Manager software:

- You must determine the environment in which you will be using the licensing software. Refer to the table on page 8 for more details.
- If you are using a central location (network server/computer) for licensing, this software must be installed on the server or central computer.

  CAUTION – If you will be pointing the workstation to the central licensing server, do ***not*** install the License Manager on the workstation computer.
- The License Manager is required when installing in a stand-alone, one-to-one software/license, environment. **Note:** *A stand-alone installation will **not** point to a licensing central location. The license resides on the local machine.*

Requirements

- The licensing program uses **Port 5053** by default. This port must be open before installing the software to ensure license communication is achieved. Contact your IT Professional if you need assistance with this procedure.
- You must have the ***Activation Code*** (sent to you by email previously) to license your software. If you do not have this code available, please contact Trimble Field Points Support at 1-800-234-3758 before proceeding.
- You must be logged in as ***administrator*** to install the License Manager application.

License Manager Installation Procedure

Tip – The instructions below assume you have downloaded and unzipped the required installation files.

1. Navigate to the location of the downloaded and unzipped License Manager software installation file.
2. Double-click on the ***License Manager.exe*** file.

   Note – *Depending on your computer settings, the **exe** file extension may not display on your computer.*
3. When the Welcome screen displays, click **Next**.
4. The *License Agreement* displays on the screen. Read the agreement. Click **I accept the terms of the license agreement** and then click **Next**.

   Tip – You must accept the terms of the agreement to proceed with the installation. If you want to print the agreement before proceeding, click on the **Print** button.
5. In the *Ready to Install the Program* screen, click **Install**. The required files are installed on your server/central computer.
6. Click **Finish** in the *InstallShield Wizard Complete* screen.

License Activation

1. When the installation is complete, the *License Activation* dialog displays. The default method to activate your license is by using the Activation Code emailed to you previously. Enter this code in the **Activation Code** field.

   Tip – You can also copy and paste this code from the email into the field.

2. In the **Licenses to Activate** field, enter the number of licenses you wish to activate at this time. Keep in mind that you are allowed to activate ONLY the number of licenses you have purchased

   Note – *Trimble recommends that you activate the required licenses during the installation procedure; however, you may elect to do it at a later time.*

   CAUTION – If you intend to use a combination of server and one-to-one (local or stand-alone) licenses, do not activate all licenses available in this dialog. Doing so assumes all licenses will be pulled from the license server, making no licenses available for the local computer.

3. Click **Activate**.

License Information

- If you chose to activate your licenses at a later time or need to activate additional licenses, refer to Activate Licenses, page 17 for additional information.
- Refer to Managing Licenses, page 18 for information on how to manage your Trimble Field Points licenses.

Trimble Field Points Software

Before you begin the software installation process, keep the following in mind:

- If you installed the License Manager in a central location, you must have the computer/server name for where you are installing the License Manager software available. This information is entered during the Trimble Field Points installation routine.
- If you will be using multiple workstations, this software must be installed on each computer.
- The instructions below assume you have downloaded and unzipped the required installation files.

Trimble Field Points Installation Procedure

Tip – The Trimble Field Points software is not backward compatible. The Trimble Field Points release must correspond with the Autodesk compatible version. While you can have multiple versions of the Trimble Field Points software installed on the same computer, you must also have the compatible Autodesk applications installed.

1. Navigate to the location of the downloaded and unzipped Trimble Field Points software installation file(s). Depending on your Autodesk platform and compatible version, the file names are in the following format:

   Trimble Field Points-*[Autodesk Product] [Version#]*

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

⚠ **CAUTION –** Make sure you are installing a compatible version of the Trimble Field Points software based on the AutoCAD or Revit software version(s) you currently have installed.

2. Double-click on the appropriate installation exe file based on your Autodesk software. The installation routine prepares the files. When the Welcome screen displays, click **Next**.
3. The *License Agreement* displays on the screen. Read the agreement. Click **I accept the terms of the license agreement** and then click **Next**.
4. 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 on the **Print** button.
5. In the *License Server Information* screen, enter the license **Host Name**.
   - If you installed the License Manager in a central location (pulling licenses for all workstations from this location), enter the name of the computer where the License Manager software resides, for example *YourCompanyNameServer* (no spaces or punctuation) or the IP address for the server.
   - If you are pulling the license from the local machine where the Trimble Field Points software is installed, you must enter 127.0.0.1. The Trimble Field Points software will then look to your local computer for licensing.
6. In the *Ready to Install the Program* screen, click **Install**.
7. When the installation is complete, click **Finish**.

Proceed to the Getting Started, page 14 to learn how to start using the Trimble Field Points software.

CHAPTER 3

Getting Started

In this chapter:

- Open Software
- Default Settings
- License Manager
- Software Assistance

When you complete the installation procedures, you are ready to start working with the Trimble Field Points application. This chapter provides you with the required steps.

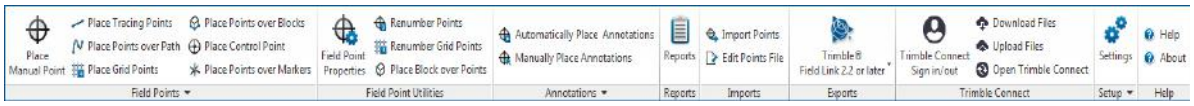
- Obtaining license seats through the License Manager software.
- Creating your default settings before using the application.

Before you proceed with the directions contained in this chapter, make sure you have completed all installation steps required as outlined in the previous chapters.

Open Software

The Trimble Field Points software is an add-on to your compatible Autodesk application. When you open the Autodesk software, the field points application is available from the **Trimble® Field Points** tab on the main ribbon, or menu (depending on how you have your application configured). The graphic below illustrates how the ribbon displays if you work with the ribbon panel fully open.

AutoCAD® Trimble Field Points Tab



Revit® Trimble Field Points Tab

Default Settings

The Field Point Settings module allows you to set defaults that will be used system-wide. You can change these settings for specific point types; however, any change you make outside of the Field Point Settings window will not change your default settings.

Trimble recommends that you create defaults as this will make creating your field points much easier.

Quick Steps: Setup

- Go to the **Setup** group and click **Settings**. The Field Point Settings dialog displays.
- Refer to the online help for details on completing the information in this dialog.

Additional Settings available in the Setup group include:

- ***License Manager***
  The License Manager provides information on connecting to the Trimble Field Points License Server. This information is setup during the installation routine; however, you can view or modify settings as necessary in this window.
- ***Field Point Entity Settings***
  These settings allow you to:
  - Name and organize the entities you want available for use as field points in your drawings
  - Organize the entities into categories to aid in locating a desired entity
  - Control the availability of entities from this window
- ***Revision Cloud Entity Settings***
  Revision Cloud Entity Settings allow you to define drawings/shapes you want to use to note point revisions. This feature works in conjunction with the Import Points functionality to identify differences in the original drawing versus the points placed in the field. The revision cloud entity is inserted around a point that does not fit within the tolerance defined for the imported entities.

- ***Group Settings***
  Revit only
  Group Settings allow you to create user-defined groups that you can assign to your points. This feature is used to simulate layers in your Revit model (similar to AutoCAD) to better define imported field points.
- ***Convert TPC Marker***
  Revit only
  This command allows you to use markers created in Trimble® Point Creator from within the Trimble Field Points software. This avoids the need to recreate these markers in your model.

The Trimble Field Points online help system will guide you through configuring these settings according to how your company does business.

License Manager

The Reprise License Manager provides information on connecting to the Trimble Field Points License Server. This information is setup during the installation routine; however, you can view or modify settings as necessary.

Tip - You must be connected to the License Server to use the Trimble Field Points software.

Important Note

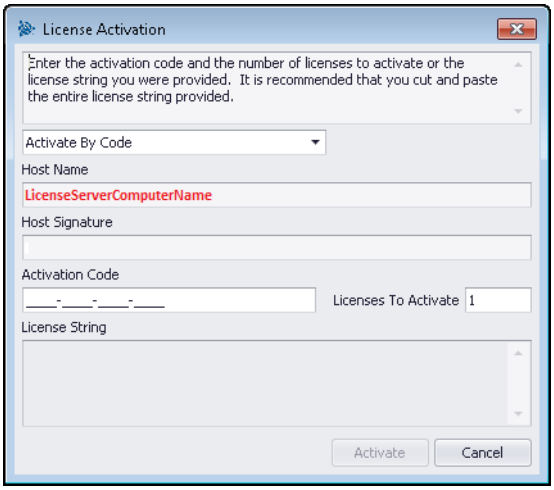
The licensing program uses **Port 5053** by default. This port must be open to ensure license communication is achieved. Contact your IT Professional if you need assistance with this procedure.

Activate Licenses

If you elected to *not* activate licenses during the installation procedure or you need to activate additional licenses, proceed as follows:

1. Go to the computer containing the License Manager. ***Note:*** This is where you installed the software (either in a central location of stand-alone, one-to-one computer/license environment).
2. Go to the Windows **Start** menu **/ Reprise License Manager / License Activation Utility**.
   OR
   Navigate to [DriveLetter]\\ProgramData\RLM\ and click on ***ActivateLicenseServer.exe***.

   Note – *Depending on your computer settings, the* ***exe*** *file extension may not display on your computer.*
3. In the *License Activation* dialog, enter the **Activation Code**. You can also copy and paste this code from the activation email (previously received) into the field.



4. In the **Licenses to Activate** field, enter the number of licenses you wish to activate at this time. Keep in mind that you are allowed to activate ONLY the number of licenses you have purchased

   CAUTION – If you intend to use a combination of server and one-to-one (local or stand-alone) licenses, do not activate all licenses available in this dialog. Doing so assumes all licenses will be pulled from the license server, making no licenses available for the local computer.

5. Click **Activate.**

Managing Licenses

Managing your licenses is accomplished through the Reprise License Manager (RLM) software. You can open this application using the following procedures.

Tip – This procedure is performed where you installed the software (either in a central location of stand-alone, one-to-one computer/license environment).

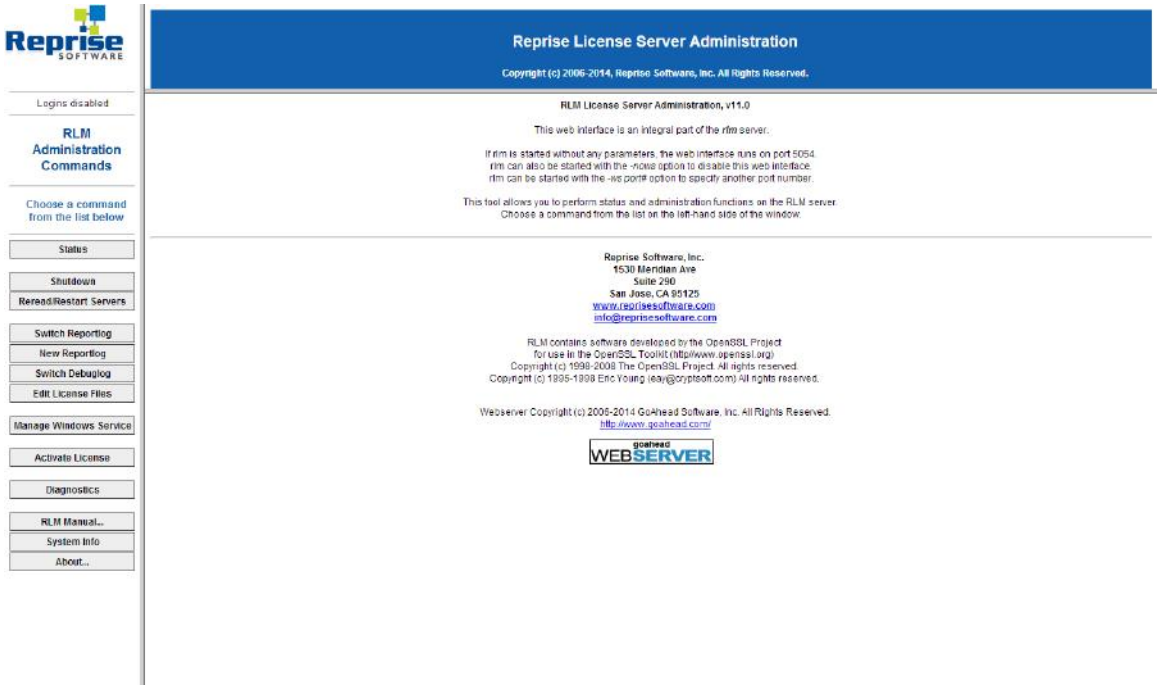
Go to the Windows **Start** menu and navigate to **/ Reprise License Manager / License Management**.

OR

1. Open Internet Explorer.
2. In the address, enter *http://**[LicenseManagerComputerName]**:**[Port#]***.

   ***Note –** Substitute the name of the computer where the License Manager is installed and the Port # for the bracketed items in the address. (The port number should be '5054' as this is the default.)*

This opens the Reprise License Server Administration window. This program allows you to manage your Trimble Field Point licenses as necessary. Use the navigation pane on the left side of the window to view the various license management options available.

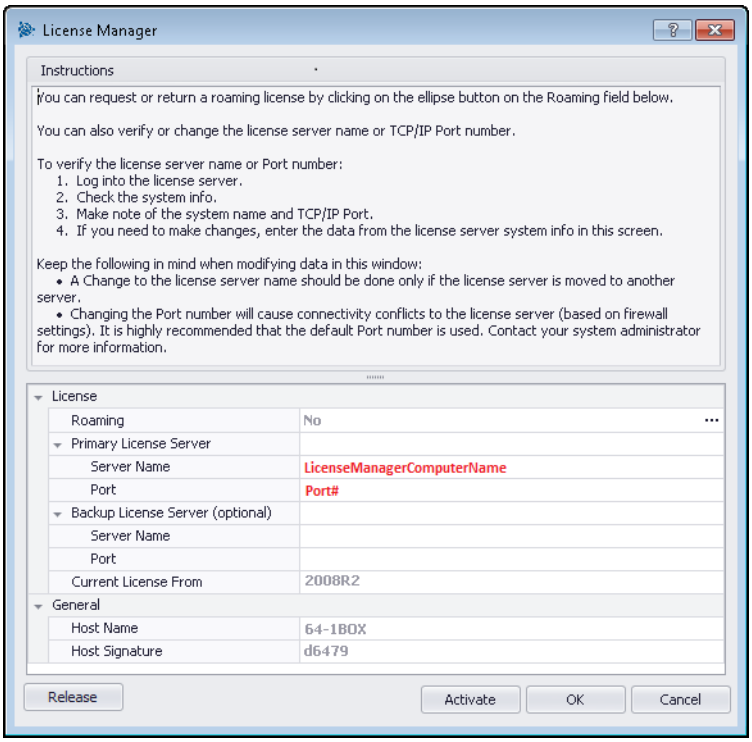


If you need assistance, contact a Trimble Field Points technical support representative. See page 21 for contact information.

Trimble Field Points License Manager

The License Manager within the Trimble Field Points software provides information on connecting to the License Server. This information is setup during the installation routine; however, you can view or modify settings as necessary in this window.

Quick Steps: Setup / License Manager



Trimble recommends that you modify the information in this window only under the direction of your IT professional AND a Trimble Support Representative.

Refer to the Trimble Field Points online help system for more information on using the License Manager in conjunction with the Trimble Field Points software.

Software Assistance

Trimble offers help with our software programs:

Online Help System

The Trimble Field Points software includes both online help and guides that detail the steps to use the software. Sources of related information include the following:

- ***Online Help***
  The software has built-in, context-sensitive help that lets you quickly find the information you need. Access it from the *Help* menu. Alternatively, click the Help button in a dialog, or press F1.

- ***Help Guide***
  If you prefer a printout of the help system, it is available in a portable document format. You can obtain this from the Trimble Field Points help folder. The location varies based on the Autodesk product you are working in.
  - TFP_AutoCAD.pdf
    C:\ProgramData\Autodesk\ApplicationPlugins\Trimble.Field Points [*ProductVersion#*].bundle\Contents\Help\Help Output
  - TFP_Revit.pdf
    C:\ProgramData\Autodesk\Revit\Addins\[*ProductVersion#*]\Trimble Field Points\Contents\Help\Help Output

  Trimble has provided a reprint authorization (located within the online help system), if you want to have your local print vendor produce a printed guide.
- ***Support***
  If you need additional help, you can also contact Trimble Field Points technical support. Contact information is on the following page.

Trimble Field Points Support

If you need additional assistance with the Trimble Field Points software, Before calling Trimble Field Point Support, we suggest you consult the online help. Many of the common questions are covered in this system.

Tip – The Trimble Field Points software includes additional language packs. Please keep in mind that software support is available in English ***only***.

Trimble Field Point Support is available Monday through Friday. We are not available on major holidays.

Phone Support

Toll-free Telephone	1-800-234-3758
Fax	303-799-6547

Email

TFPSupport@trimble.com

Website

buildings.trimble.com

www.trimble.com

CHAPTER 4

License Conversion

In this chapter:

- Overview
- Preliminary Requirements
- Installation/Conversion Procedures
- Verification

This chapter provides information on the steps required to convert a trial license to a permanent license.

Overview

Trimble offers a demo/trial license, which allows you to “try-out” the software for a specific period of time. When you decide to purchase a permanent license, you can simply convert the demo license.

In order to ensure the license conversion works properly, follow the instructions in this section very carefully. There are several steps required to convert your demo license to a permanent license.

CAUTION – To ensure proper permanent licensing of the Trimble Field Points software, you must complete the procedures in the order presented in these instructions.

Preliminary Requirements

Activation Email

You should have received an activation email from Trimble with download information and an activation code required to properly license the Trimble Field Points software. If you did not receive this email, please contact Trimble Field Points Support at 1-800-234-3758 before proceeding.

Download Software

You must download the ***License Manager*** software in order to obtain permanent licensing for your Trimble Field Points software. Refer to Software Download on page 7 for information.

Tip – You may want to download the latest version of the Trimble Field Points software (if a newer version is available). This allows you to take advantage of the latest features added to the software. If you choose to download updated software, keep in mind that you must download a version compatible with the version of AutoCAD or Revit you currently have installed.

Installation/Conversion Procedures

License Environment

Trimble allows you to use the licensing software in different environments. Because you have been working with a demo/trial license, you may not have considered these options during the try-out period. You might want to review the Determine License Environment topic on page 8 before proceeding.

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