



Sage Estimating

(formerly Sage Timberline Office Estimating)

Getting Started with TRA-SER Integrator

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Contents

Welcome to TRA-SER Integrator	1
How to use this booklet	1
Help - always at your fingertips	2
Comprehensive Help on your system	2
Timberline technical support	2
i2 Technologies technical support	3
How to install TRA-SER Integrator	3
The big picture	5
How the items are linked	6
How the databases are linked	6
How price updates work	7
Setup procedures	9
Step 1—Prepare Estimating databases	10
Step 2—Set up TRA-SER Integrator	11
Step 3—Import TRA-SER prices for the first time	12
Using TRA-SER Integrator	13
Updating Estimating with prices from TRA-SER	14
Troubleshooting importing and updating prices	15
Working with Discontinued Items and Items Without UPC Codes . . .	16



Welcome to TRA-SER Integrator

Timberline® Office TRA-SER® Integrator links prices on items in Timberline Estimating databases with prices of like items in TRA-SER databases from i2 Technologies. TRA-SER Integrator allows you to use i2 TRA-SER Pro to update and adjust prices in Estimating databases from a range of prices in various i2 TRA-SER databases.

How to use this booklet

We know you are eager to start working as quickly as possible, and the goal of this booklet is to help you do just that. After reading the following sections, you'll be ready to use this product.

- **Welcome to TRA-SER Integrator**—describes the software, Help and technical support available and provides instructions for installing TRA-SER Integrator.
- **The big picture**—illustrates how TRA-SER Integrator and i2 TRA-SER Pro work together to update prices on items in Estimating databases.
- **Setup procedures**—explains how to set up Estimating databases and TRA-SER Integrator, and how to import prices the first time.
- **Using TRA-SER Integrator**—explains how to update prices and how to verify that prices were imported or updated successfully. You will also find information on TRA-SER reports and how to work with discontinued items or items without UPC codes.

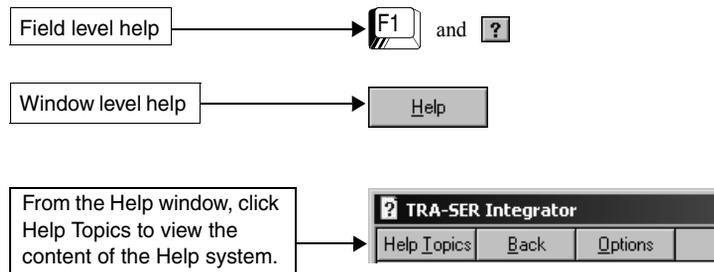
Help - always at your fingertips

TRA-SER Integrator provides all the information you need right on your computer. In addition, our competent technical staff is only a phone call away.

- *The software includes an online Help system. It provides not only Help about what you are doing, but also step-by-step instructions.*
- *You can also obtain information from our Web page at www.timberline.com.*

Comprehensive Help on your system

Instead of bulky manuals that you never quite get around to reading, help files come with TRA-SER Integrator. Our efficient Help system provides faster access to more information than most manuals. With a click of the mouse or a keystroke, you can easily get help for a command, a field, a window, or a procedure.



Timberline technical support

If you have questions or issues not covered by this booklet or the Help system, you can contact Timberline Software Support by telephone, fax, or e-mail. Support lines are open from 6:00 a.m. to 5:00 p.m. Pacific Standard Time, Monday through Friday.

For support in...	Call...	Fax...	Or e-mail...
U.S. or Canada	1-800-551-8307	503-439-5333	timberline.support@best-software.com
Australia	1800-120-369	+503-439-5333	timberline.support@best-software.com
Asia-Pacific and Other International Areas	+503-533-2181	+503-439-5333	timberline.support@best-software.com

When calling, be sure to have your customer number handy and be at your computer.

- If you are not on a support and maintenance plan, you can call on a charge-per-call basis. Please be prepared to give the number of a major credit card when you call.

i2Technologies technical support

If you have questions or issues while using i2 TRA-SER Pro, you can contact i2 Technologies technical support by telephone or through their internet Web site. Support lines are open from 7:00 a.m. to 4:30 p.m. Pacific Standard Time, Monday through Friday.

For support in...	Call...	Fax...	Or e-mail....
Within the U.S.	1-800-701-6999	1-858-521-1445	sd - technical support@i2.com
Outside the U.S.	n/a	+858 521 1445	sd - technical support@i2.com

How to install TRA-SER Integrator

To install from a CD-ROM:

For system requirements and information about installing TRA-SER Integrator, refer to the installation card included in the product package. You can find more detailed installation instructions in the *Resource and Installation Guide*, located on the CD-ROM in the Documents folder.

To install from a web download:

- 1 Start Windows Explorer.
- 2 Locate the TRA-SER Integrator setup file, TSISetup.exe, and double-click on it.
- 3 Follow the instructions on the screen.

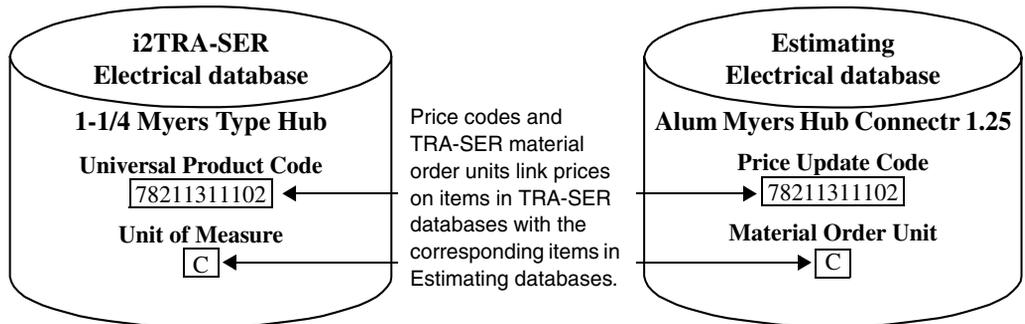


The big picture

There are a few basic concepts that you need to understand before you begin using the product. The concepts are not difficult, and you may already be familiar with them. After reading this section, you will be ready to set up and use TRA-SER Integrator.

How the items are linked

Price codes and TRA-SER material order units are the means to the link between Estimating and TRA-SER databases. TRA-SER uses universal product codes (UPC) as their price codes and the following unit of measure (UOM) codes as their material order units: E (each), C (per 100), and M (per 1,000). The price codes and material order units provide the link used to import and update TRA-SER prices to Estimating items.



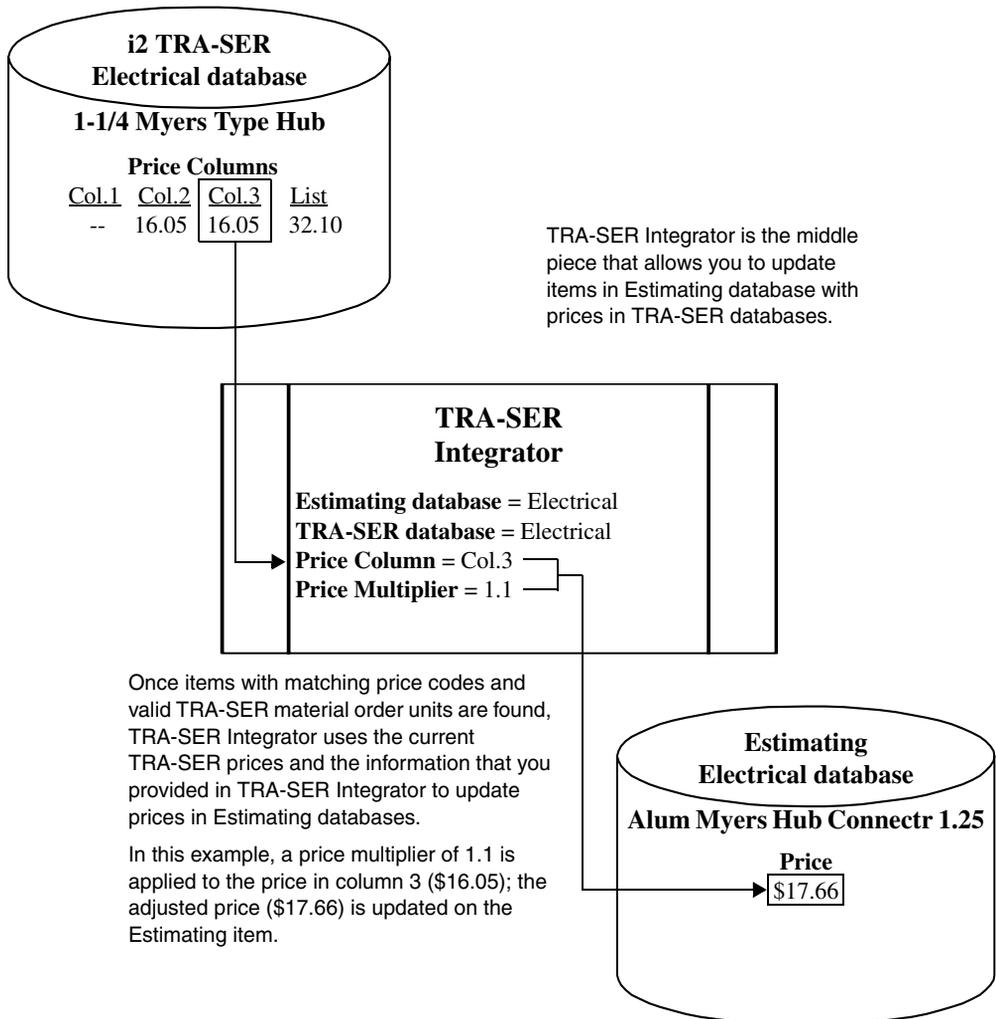
💡 Although valid TRA-SER material order units (E, C, or M) are required on the Estimating items that you want to update, they do not need to match those on corresponding TRA-SER items. The order units and conversion factors on Estimating items are updated automatically as part of the price update process.

How the databases are linked

The setup of TRA-SER Integrator links the Estimating database and the TRA-SER database. Within TRA-SER Integrator, you link Estimating databases to TRA-SER databases that you want to update. TRA-SER databases contain multiple prices for every item. You select which price column you want to use to update prices on Estimating items. In addition, you can adjust these prices up or down using a price multiplier.

How price updates work

TRA-SER Integrator compares items in the specified Estimating and TRA-SER databases to find those with matching price codes and then verifies that these Estimating items have valid TRA-SER material order units. When both of these requirements have been met, new prices are updated on the resulting Estimating items. If the material order units have changed or differ between databases, they are also updated along with any conversion factors on the affected Estimating items.





Setup procedures

This section explains how to set up Estimating databases and TRA-SER Integrator, and how to import TRA-SER prices into Estimating databases for the first time. After you complete these one-time setup procedures, you can update prices.

The three steps to set up your software are:

- 1 Prepare Estimating databases.
- 2 Set up TRA-SER Integrator.
- 3 Import TRA-SER prices for the first time.

Step 1—Prepare Estimating databases

Although you do not need to use material classes to price items, items with the same material class and description must use the same price code. In addition, if some items with the same price code have been assigned to a material class and description while others have not, you do not need to assign the remaining items to a material class and description. When you import or update prices, those items without that material class and description will have the material class and description added to them.

Items that are linked to each other must use the same price code.

Use the Estimating Price Codes Report to print a list of Estimating items that have price codes. From the Database menu, select Reports, Items, Price Codes to view and print this report for the current database.

Price codes and TRA-SER material order units are the basis of the link between Estimating and TRA-SER databases. When items in these databases have matching price codes and the Estimating items have valid TRA-SER material order units, the link needed to import and update TRA-SER prices into Estimating databases is available.

In Timberline Estimating, use Database Editor to select Items. Select the price code and TRA-SER material order unit associated with each item in every Estimating database that you want to update with TRA-SER prices.

Item Navigator	Phase	Item	Description	Takeoff Unit	Categories	Price Code	Material Price/Order Unit	Material Order Unit	Material Conversion Factor
16010.000 GEN									
16050.000 BASI									
16120.000 CON									
16130.000 FAC	295	16070.320	175 11 HOLE 8/3 SEU STRAP	EA	LM	78227253230	8.43	AC	100
16140.000 WIR	296	16070.320	180 11 HOLE 8/3-6/2+6/1 SE STRAP	EA	LM	78461056007	14.84	AC	100
16200.000 ELEC	287	16070.320	185 11 HOLE 8/3-6/3 MALL SE STRA	EA	LM	78521001344	44.29	AC	100
16300.000 HIG	288	16070.320	190 11 HOLE 6/3-4/2+6/1 SE STRAP	EA	LM	78461056009	16.1	AC	100
16400.000 LOW	289	16070.320	195 11 HOLE 6/3 SEU STRAP	EA	LM	78227253130	9.27	AC	100
16500.000 LIGH	290	16070.320	200 11 HOLE 4/3 SEU STRAP	EA	LM	78227253090	11.04	AC	100
16700.000 SPEC	291	16070.320	205 11 HOLE 4/1-2/2 STL SE STRAP	EA	LM	78461060012	27.07	AC	100
	292	16070.320	210 11 HOLE 4/3-2/3 MALL SE STRA	EA	LM	78521001345	50.77	AC	100
	293	16070.320	215 11 HOLE 2/3 SEU STRAP	EA	LM	78227252840	16.61	AC	100
	294	16070.320	220 11 HOLE 2W 3/0-4/0 AL SE STRA	EA	LM	69839701427	50.72	AC	100
	295	16070.320	225 11 HOLE 3W-1/0 SEU STRAP	EA	LM	78227252740	29.71	AC	100
	296	16070.320	230 11 HOLE 3W 1/0 MALL SE STR	EA	LM	78521001346	70.18	AC	100
	297	16070.320	235 11 HOLE 3W 1/0-2/0 AL SE STRA	EA	LM	69539701420	44.7	AC	100

Enter the 11-digit Price Code.

Enter or select the Material Order Unit.

Enter a conversion factor when the takeoff and order units differ.

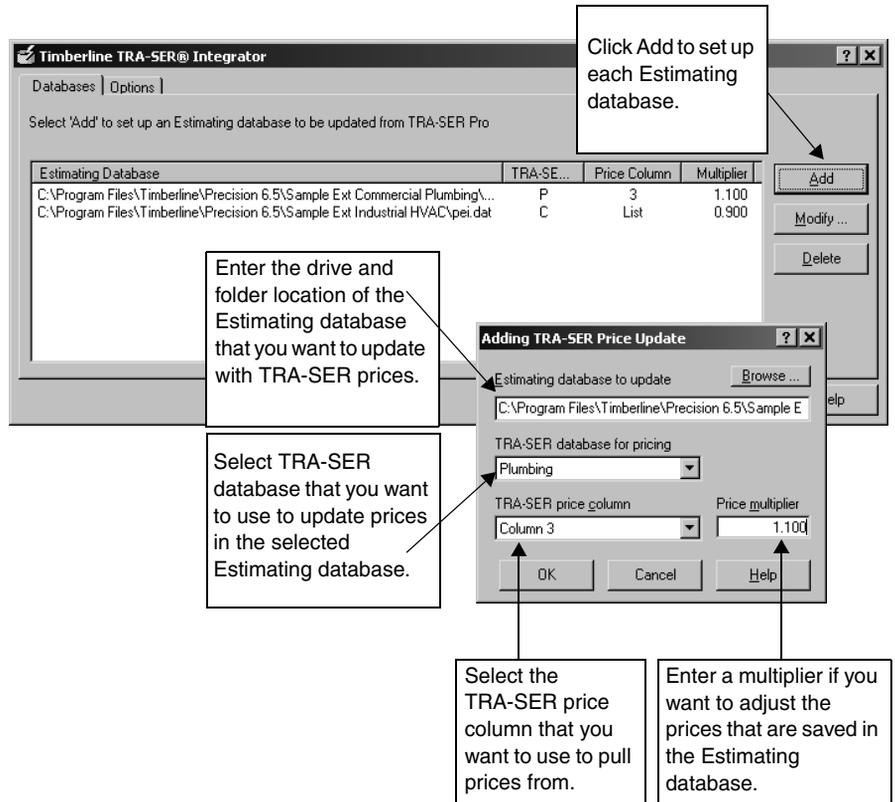
When you enter TRA-SER universal product codes in the Items Table window, enter the 11-digit codes without dashes (-). TRA-SER Integrator does not recognize and update Estimating items with price codes that contain dashes.

Step 2—Set up TRA-SER Integrator

 Click the Options tab to define defaults for TRA-SER Integrator, including TRA-SER database, price column and price multiplier.

After you assign price codes and TRA-SER material order units to items in Estimating databases, the next step is to set up TRA-SER Integrator.

From the Start menu, select Program Files, Timberline Office, Estimating, TRA-SER Integrator. For each Estimating database that you want to update with TRA-SER prices, enter the TRA-SER database that you want to use for pricing, which TRA-SER price column to pull prices from, and what multiplier (if any) to apply to the price.



The screenshot shows the Timberline TRA-SER Integrator application window with the Options tab selected. The main window displays a table of Estimating Databases and an 'Add' button. A callout box points to the 'Add' button with the text: "Click Add to set up each Estimating database."

Estimating Database	TRA-SE...	Price Column	Multiplier
C:\Program Files\Timberline\Precision 6.5\Sample Ext Commercial Plumbing\...	P	3	1.100
C:\Program Files\Timberline\Precision 6.5\Sample Ext Industrial HVAC\pei.dat	C	List	0.900

The 'Adding TRA-SER Price Update' dialog box is open, showing the following fields:

- Estimating database to update: C:\Program Files\Timberline\Precision 6.5\Sample E
- TRA-SER database for pricing: Plumbing
- TRA-SER price column: Column 3
- Price multiplier: 1.100

Callout boxes provide instructions for these fields:

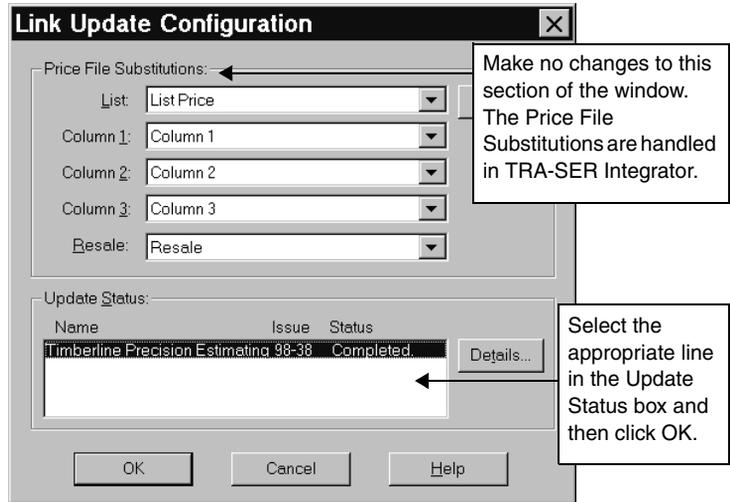
- "Enter the drive and folder location of the Estimating database that you want to update with TRA-SER prices." (points to the 'Estimating database to update' field)
- "Select TRA-SER database that you want to use to update prices in the selected Estimating database." (points to the 'TRA-SER database for pricing' dropdown)
- "Select the TRA-SER price column that you want to use to pull prices from." (points to the 'TRA-SER price column' dropdown)
- "Enter a multiplier if you want to adjust the prices that are saved in the Estimating database." (points to the 'Price multiplier' text box)

Step 3—Import TRA-SER prices for the first time

 **Repeat this step whenever there is doubt about the synchronization and accuracy of price updates, e.g., if you change price codes on Estimating items or update the setup of TRA-SER Integrator.**

Once you have prepared the Estimating databases and set up TRA-SER Integrator, you need to run a first-time price update from i2 TRA-SER Pro. The Link Refresh command in TRA-SER Pro automatically updates Estimating database items that have matching price codes and valid TRA-SER material order units with current TRA-SER prices.

In TRA-SER Pro, select Link Refresh from the Options menu. In the Update Status section of the Link Update Configuration window, highlight the applicable entry and click OK. All Estimating items with matching price codes and valid material order units are priced.



Screen illustration courtesy of i2 Technologies, Inc.

 For information on how to verify that all prices were imported successfully, see *Troubleshooting importing and updating prices* on page 15.



Using TRA-SER Integrator

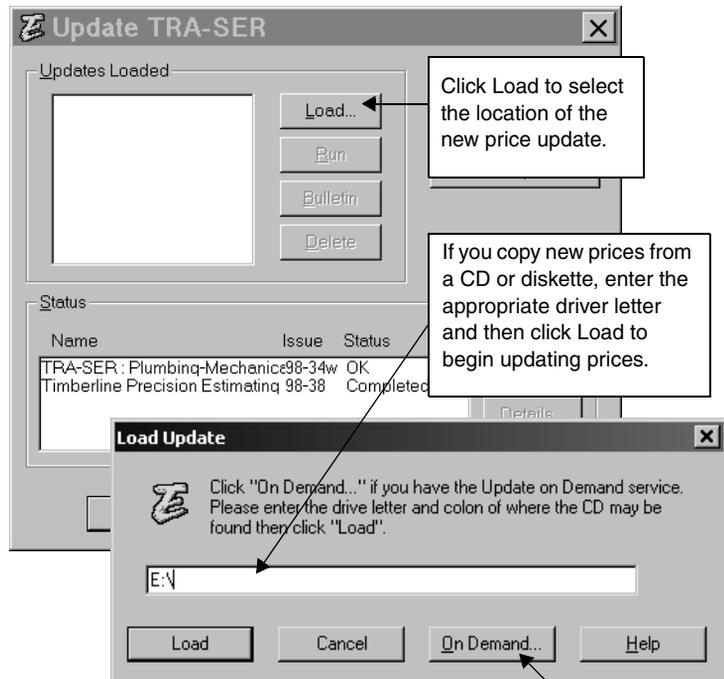
This section explains how to update Estimating database prices. Update prices after you perform the setup procedures described in the previous section, and then each time i2 Technologies makes new prices available. This section also provides information on how to verify that prices were imported or updated correctly.

Updating Estimating with prices from TRA-SER

 For more information about using TRA-SER Pro, see the TRA-SER Pro documentation.

After you have finished the three setup steps (prepare Estimating databases, set up TRA-SER Integrator, and import initial TRA-SER prices), use TRA-SER Pro to update prices in Estimating databases each time you receive updated prices from i2 Technologies.

Click the Start button. On the Programs menu, select TRA-SER Update. Click Load and then enter information about where the price updates are located. TRA-SER Pro Update begins the price update process.



Screen illustrations courtesy of i2 Technologies, Inc.

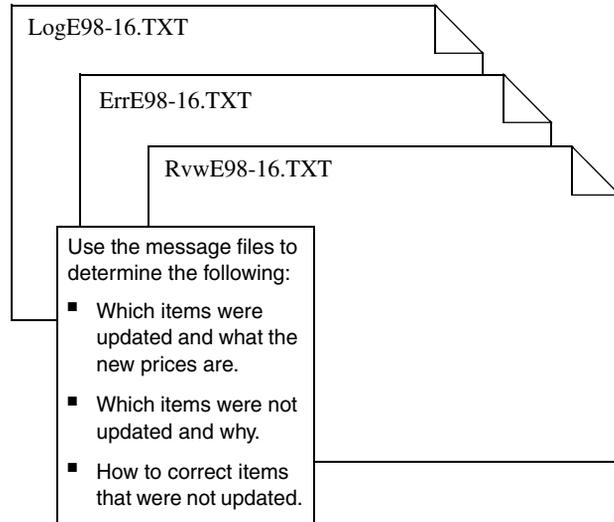
 For information on how to verify that all prices were updated successfully, see *Troubleshooting importing and updating prices* on page 15.

Troubleshooting importing and updating prices

 *The message files use the following naming conventions:*

- *X is the type of TRA-SER database (E, C, or P)*
- *YY-WW is the year and week that the new TRA-SER prices were updated, e.g., 98-16.*

Three message files are created each time you import or update prices. These files are stored in the same folder as the Estimating database being updated.



- Log file (Log XY - WW .TXT) lists each item by phase that was updated successfully. This file includes the price code, old and new item prices, and the material order unit.
- Error file (Err XY - WW .TXT) includes the Estimating items that could not be updated due to invalid price codes. Enter valid price codes for these items and then import or update prices again.
- Review file (Rvw XY - WW .TXT) provides information about changes that need to be made to the Estimating database for prices to be imported or updated on the related items. Make the suggested changes as appropriate and then import or update prices again. This file contains information in addition to that found in the error log.

 The review file also lists new TRA-SER items that have been added to the TRA-SER database since the last price update.

Working with Discontinued Items and Items Without UPC Codes

TRA-SER Reports

There are two reports available in TRA-SER.

- **Item Code Report:** This report appears when you click [**Item Code Report**] in the **Timberline TRA-SER Integrator** window. This report lists all items, including items that have been discontinued or are unlisted by the manufacturer.
- **Traser Update Report:** This report appears each time you update TRA-SER. The report lists all discontinued items and items which have no UPC codes, meaning they no longer reference the item.

Locate and Change Items Not Pricing

If changes occur in pricing, such as manufacturer changes that cause TRA-SER to discontinue or change items in the database, these changed items do not update in Timberline's TRA-SER database. You need to find substitute items in the TRA-SER database for the Timberline Estimating database.

Do not delete items, but delete only relevant fields in the Timberline database. If you delete items you may cause assemblies and models to improperly function.

To locate and change items:

- 1 Open Database Editor and open the appropriate electrical database.
- 2 Apply the filter Elec Unpricable Tra-Ser Items.



If the Elec Unpricable TraSer Items filter does not exist, create and apply the filter in Database Editor to filter the Price Code column that contains U, D, or Q. See the help topic on “Filtering” in Database Editor’s online help.

- 3 For each item that did not reprice, find a substitute item in TRA-SER.
- 4 When you locate an acceptable item, determine the changes for each field for items that are different.

