

Sage Estimating (SQL)

(formerly Sage Timberline Estimating)

Release Notes

Version 16.11

**This version of the software
has been retired**

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Version 16.11 Release Notes

This document provides important information regarding new features and changes in your Sage Estimating 16.11 software. Read these release notes carefully before installing Sage Estimating 16.11.

Installation Notes

System Requirements

For current information about supported operating systems, Internet browsers, Microsoft® SQL Server®, and other software, and about system requirements for servers and client workstations, refer to our Knowledgebase article ID 76530, available at <https://support.na.sage.com/selfservice/viewdocument.do?externalid=76530>.



NOTE: While Sage Estimating (SQL) continues to support 32-bit Microsoft SQL Server, the installation package includes only the 64-bit Microsoft SQL Server Express application.

Update or Migrate your Data?

Sage Estimating 16.11 uses a Microsoft® SQL Server®-based database platform. If you are migrating from Pervasive-based Sage Estimating (versions 9.6 and later), you must migrate your data before you can use it in Sage Estimating 16.11. Refer to the *Installation and Administration Guide* in the **Documents** folder of your Sage Estimating installation files for migration instructions.

However, if you previously installed SQL-based Sage Estimating version 11.1 or later, you are only required to upgrade your data prior to using it with Sage Estimating 16.11.

To upgrade your data:

- 1 Install Sage Estimating 16.11 in accordance with the *Installation and Administration Guide*.
- 2 Start the Configuration wizard by selecting **Start > All Programs > Sage > Estimating 16.11 > Configuration Wizard** or by clicking the desktop icon.

In Windows 8.1, select the Configuration Wizard icon from the Tile Desktop, or right-click outside the tile area, and then click **All apps > Sage > Configuration Wizard**.

- 3 Follow the Configuration wizard on-screen instructions and upgrade your data when prompted.

Refer to the *Installation and Administration Guide* for more information about migrating and upgrading your data.

New Features and Enhancements

Sage Estimating version 16.11 includes:

- [A dramatically simplified installation process](#)
- [Ability to import price updates](#)
- [New database management tools](#)
- [Address Book improvements](#)
- [Estimate Catalog enhancements](#)
- [Spreadsheet enhancements](#)
- [Reporting enhancements](#)
- [Enhanced user assistance](#)
- [Performance improvements](#)
- [Other improvements and changes](#)

The following sections provide more details about these changes.

Simplified installation process

We have dramatically simplified the installation process for version 16.11.

Previous versions provided an array of installation options required by the underlying technology in those versions. The consequences of each choice were not obvious to all our customers.

In version 16.11, we have updated this supporting technology, reducing installation choices to two simplified, understandable options. Now, when installing Sage Estimating (SQL), you can select either, or both, of these two options:

- **Install Sage Estimating.** You select this option to install Sage Estimating for the first time, or to upgrade the software on your computer.
- **Create a new local SQL Server instance.** You select this option if you have not already created a SQL Server instance for a previous installation of Sage Estimating.

Normally, you do not need to create multiple SQL Server instances for Sage Estimating (SQL). If you have multiple companies with different system administrators and security requirements, you may need to create a new instance. You should be aware, however, that each new instance will use more of your computer's resources.

If you select this option, you must also specify a name for the new instance.

Ability to import price updates

A current cost database can make the difference in winning a job. However, with well over 10,000 category prices in a typical cost database, keeping prices up to date can be challenging. It is time-consuming to enter this information from a variety of source catalogs and services.

With version 16.11, Sage Estimating introduces an automated process for updating databases. A new Data Importer in the Database Editor enables you to apply mass updates to a database in minutes.

You can create an update file in Microsoft® Excel® (or another spreadsheet program) using independent pricing, pricing provided by a third-party service, or a combination of the two.

You can associate prices with individual item records (by PI code), or with groups of items using common work breakdown structures (WBS codes and values) or price update codes (PU codes).

Database Editor logs the price changes, as well as any errors encountered during the import process. You can then review all the changes in the price update log before saving the new prices permanently. You can also return to the Data tab to view the pending changes. Items that will be updated when you save the new prices are highlighted.

For more detailed information on creating and importing price update files, see "About Data Importer" and related topics in the Database Editor help.

New database management tools

The Estimating Management Console includes a new Tools menu with utilities to help you manage and safeguard your Sage Estimating databases. Use them to efficiently back up, restore, and optimize databases in your Sage Estimating system.

To display the tools, click the [Tools] button in the Estimating Management Console.



NOTES:

- You must run the Back Up and Restore processes from your server machine. These tools are not available when you use the Estimating Management Console on a workstation.
- The Back Up, Restore, and Optimize processes lock out other users. To prevent a loss of data, ensure that no other users are working with the databases you plan to back up, restore, or optimize.
- You must indicate that you have exclusive use of the databases before you can back up, restore, or optimize databases.

For information on using these tools, see the Estimating Management Console help.

Address Book improvements

In version 16.11, it's easier than ever to keep your Address Book streamlined and up to date.

Easily eliminate duplicate Address Book entries

Sage Estimating avoids creating unnecessary duplicate Address Book entries:

- When you migrate estimates and address books from Sage Estimating (Pervasive).
- When you upgrade existing Sage Estimating databases to 16.11

If multiple entries existed for the same company in the old database, Sage Estimating consolidates the duplicate entries into a single entry during migration or an upgrade.

Add vendors and subcontractors "on the fly" from an estimate

You can now add addresses for vendors and subcontractors "on the fly" when you are working with an estimate. You no longer have to open the Estimating Management Console or the Address Book separately to create a new address entry for a vendor or a subcontractor.

You can create a new Address Book entry from an estimate spreadsheet by typing the vendor name in the **Vendor Name** column or the subcontractor name in the **Sub Name** column or in the bid grid. When you type a new name in one of these fields, a message appears asking if you want to add the name to the Address Book. If you click **[Yes]**, a **New Company** dialog box opens, enabling you to add the new address.

You can also add a new vendor or subcontractor on the fly for a material class. In the **Bill of Materials** window, select the material class, and then click **[Edit]**. In the **Changing Database Material Class** dialog box, in the **Default sub/vendor** box, type the name of the new vendor, and then press **[Enter]**. At the message asking if you want to add the name to the Address Book, click **[Yes]**, and then add the information for the new vendor in the **Company Edit** dialog box.



NOTE: Be sure to save the address record before closing the dialog box. Otherwise, the new name will not appear in the spreadsheet.

Add Address Book companies "on the fly" from Estimate Information

You can also add Address Book companies for clients, architects, and engineers "on the fly" when you are entering data in the Estimate Information window for an estimate.

In the **Estimate Information** window, type the new company name in the **Client Company** field, the **Architect Company** field, or the **Engineer Company** field. When a message appears asking if you want to add the name to the Address Book, click **[Yes]**. The **New Company** dialog box opens, enabling you to add the new address.



NOTE: Be sure to save the address record before closing the dialog box. Otherwise, the new name will not appear in the estimate.

Estimate Catalog enhancements

With the following enhancements, you can work more efficiently when using the "tree view" in the Estimate Catalog in the **Estimating Management Console** and the **Estimating Manage Estimates** dialog:

- You can either double-click or right-click an estimate in the catalog to open it in Sage Estimating.
- In the **Estimating Management Console** and the **Manage Estimates** dialog, if you select the option to display all estimates using the grid view, you can open any estimate on the grid by double-clicking it.

Also, if you right-click an estimate on the grid, you can choose whether to open the estimate in the Sage Estimating application, or to display information about the estimate in the Estimating Management Console or the **Manage Estimates** dialog (depending on which one you are using).

- In the **New Estimate** window, you can easily create a new branch to locate the new estimate you are creating.
 - a Click [**Browse**], and then navigate to the parent folder or branch in the Estimate Catalog where you want to create the new branch.
 - b Right-click, and then click **New > Branch**.
 - c Name the new branch, and then click [**OK**].

The new estimate will be located on the new branch (a subfolder of the branch you selected in step a).

Also, when copying an estimate or merging multiple estimates, you can create a new branch for the copied or merged estimate by browsing to a location in the Estimate Catalog, and then creating a new branch in the same way.

- You can use the right-click menu to copy an existing branch and paste it in a new location in the catalog. The new branch uses the same estimate security settings, quantities, and amounts used in the original branch. This feature makes it easy to recreate and standardize complex estimates, as follows:
 - You can use branches to represent multiple estimates for a single project, enabling you to break down the project work into different categories. You can then assign the categories to several estimators working on different aspects of the same project. For example, one estimate could be for mechanical work, and another for electrical work, and so on, with the branch representing the entire project.
 - You can standardize complex estimates, ensuring that estimates for all jobs are consistent and predictable. Just as you can use a single estimate as a template, you can use a set of estimates to represent a template for a larger project.

Spreadsheet enhancements

With the following enhancements, version 16.11 continues to make the Estimating spreadsheet even easier to use:

- If you know the exact name of an existing vendor or subcontractor, you can now simply type it in the **Vendor Name** or **Sub Name** field.

If you enter a company name that is not in the Address Book, a prompt will ask if you want to add it as a new company.



NOTE: These fields are case sensitive. Be sure to enter the name with the correct capitalization and punctuation.

- In the estimate spreadsheet or in an assembly, you can easily locate items that match the description you enter in the new **Find/Goto** window. For more information about how to use the Find/Goto window to locate items, see the topic “Searching by keywords in the description” in the Estimating help.

Reporting enhancements

If you use SAP Crystal Reports to create custom Sage Estimating reports, you can now include fields from three additional tables:

- Report.GroupModel_v1
- Report.Model_v1
- Report.Overline_v1

In addition, you can now select the CoverPageNote and TotalsNote fields from the Report.ProjectInfo_v1 table when designing cover pages and total pages.

Performance improvements

With version 16.11, Sage Estimating continues to reduce processing times. You should notice considerable improvements when:

- Starting Sage Estimating applications.
- Performing bulk quick takeoffs.
- Clicking from cell to cell in an estimate spreadsheet.
- Moving and copying items on the spreadsheet.
- Deleting a crew for an estimate in a very large estimate database.

Enhanced user assistance

In Sage Estimating, new links on the Help menu provide improved access to self-help resources:

- Click **File > Help > Product Documents** to view up-to-date, printable Sage Estimating guides online.
- Click **File > Help > Sage City** to visit Sage City, an online community for Sage Estimating support and business advice.
- Click **File > Help > Sage Support > Live Chat** to chat with a Customer Support analyst.

Other improvements and changes

- You can edit estimate information in the Estimating Management Console if you have access rights to the Estimating Management Console, and you have View and Edit access to the estimate.
- In the Estimating Management Console, when you turn on the grid view, any user-defined fields use the custom descriptions rather than the default "User Defined Field XX."
- You can define up to four item sort orders for a standard database. These customized sort orders appear in the **Sort Item List by** menu when you perform takeoff or standard database maintenance.
- When merging estimates, you can choose to apply a city cost index by selecting a new option, **Apply a CCI after merge**, on the **Step 2** tab in the **Merge Estimate wizard**.
- When you import estimates that were exported using previous versions of Sage Estimating (SQL), they are upgraded automatically to the current version.
- You can now use up to 260 characters in User Job Class fields.
- Beginning with version 16.11, only the 64-bit SQL Server Express 2014 64-bit installation and tools are included with Sage Estimating, although Estimating applications continue to support 32 bit SQL Server.

Fixes Since the Previous Version

Version 16.11 includes the following fixes:

- You can close a report preview by clicking the "x" on report preview tabs.
- You can use the **Left Arrow** and **Right Arrow** keys to move out of Notes fields.
- You can change a city cost index (CCI) to the base price for an estimate in the Estimate Information window.
- You can replace a city cost index (CCI) using a value from the estimate or from the database list.

- You can migrate multiple files on the server without receiving an error message.
- User-defined fields now wrap properly on reports.
- Users who do not have View access to an estimate can no longer view the estimate in the Estimate Catalog.

Fixes Included in Revisions to Version 16.11

We provided a number of fixes in revisions to the software since the original version 16.11 release.


September 2016 Critical Update (Revision 2)

The September 2016 update included the following fixes:

- When you use another application alongside Sage Estimating (SQL), you no longer need to click the heading in an Estimating spreadsheet or experience a delay before you can edit the spreadsheet.
- Overlines that include quantities, units, and notes are now accessible in the overline views for custom reporting.
- Overline data (descriptions, units and notes) now appear correctly (no blank) for all sorting levels of the estimate spreadsheet.

December 2016 Critical Update (Revision 2, Update 1)

We fixed an issue that could occur after you viewed addon details or ran reports multiple times with the allocate addons option selected. With this update, allocated addon totals are correct on the spreadsheet, reports, and Job Cost figures.

 **IMPORTANT:** This update is for version 16.11 revision 2. Therefore, before you install this update, make sure you have installed revision 2.

Known Issues

Logging into Windows with an email account is not supported

Sage Estimating (SQL) does not currently support logging in using a Microsoft email account.

You must log in to Windows with a domain account or a local account. If you log in to Windows with your Microsoft email account, Estimating will not recognize you as a user.

To use a local account, change the Windows settings on your local machine as follows:

- 1 In Windows, go to **Settings > Your email and accounts**.
- 2 Click **Sign in with a local account instead**.
- 3 Enter your local Windows account ID and credentials.
- 4 Restart Windows, logging in again with your local Windows account.
- 5 If you were logged in with your Microsoft email account when you created your Estimating database, you must perform one of the following steps in SQL Server Management Studio:
 - Delete your Estimates database, and then create a new one using Configuration Manager.
 - Run the **Security.Fix** stored procedure against your Estimates database.

Installation Fails to Create an Instance for Microsoft SQL Server 2014

If you are using Microsoft SQL Server 2014 for your Sage Estimating database, the server machine must have Microsoft .NET Framework 4.5.2 installed. If you try to install a new SQL Server instance during Estimating installation and .NET Framework 4.5.2 is not installed, the installation program cannot create the instance.

SQL Server Management Studio Express Installation Quits

In some circumstances, attempts to install SQL Server Management Studio Express from the Sage Estimating setup and installation files separately are unsuccessful if you do not install Sage Estimating first.

If you want to install just SQL Server Management Studio from the Sage Estimating setup and installation files, Sage recommends either installing Sage Estimating first or ensuring you have .NET 3.51 installed and enabled on the workstation or server where you want to install SQL Server Management Studio Express.

Checking in a Standard Database from the Database Editor Closes the Database for Concurrent Users

You can work on a Standard database in the Estimating Database Editor while other users perform takeoff using the same database in the Sage Estimating program.

When you try to check in the Standard database while other users have the database open, you receive a warning that if you continue to check the file in, there may be unpredictable results for the concurrent users.

If you continue to check the file in despite the warning, the Estimating program stops working for the other users. However, the data is not corrupted and the Estimating program is not damaged.

Windows 10 Does Not Recognize Your USB Protection Device

If you are using Windows 10 and a Sentinel USB driver that shipped with an earlier version of Estimating, you may find that Windows no longer recognizes your USB protection device.

If Windows 10 does not recognize this device, you must either update the driver and then apply it to the unrecognized device in Device Manager, or reinstall the driver. For more information about this issue, and for instructions on updating the driver, see the Knowledgebase article ID 70005, available at <https://support.na.sage.com/selfservice/viewdocument.do?externalId=70005>.

Further Assistance

Sage provides you with the following resources for obtaining assistance with Sage Estimating.

Online Help

The Sage Estimating software includes online Help, which provides answers to your questions about procedures as well as items in the windows.

To access the online Help in the Sage Estimating software, click the Help button or icon, or press [F1] to display the Help topic for that window.

To help you find the information you need, the Help for each module includes the following panes:

- **Contents** pane containing links to the help topics
- **Index** pane containing keywords that link to help topics related to that keyword
- **Search** pane, where you can type text and click [Search] to locate that text in the help topics

For more information about using the online Help, see the Sage Estimating Help.

Training


Sage University offers online and classroom training sessions to help you get the most out of your Sage Estimating software. To access Sage University, visit www.sageu.com.

You can also get access to Sage University from the File menu by selecting **Help > Sage University**.

Technical Assistance

When you need assistance, refer to the Knowledgebase article [How do I get technical support for Sage Estimating?](#) to determine which service works best for you.

Submitting Enhancement Requests

We want to hear your suggestions for improving the software. To send us your comments, click on the File menu button  and select **Help > Submit Product Idea**.

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