Sage Estimating (SQL) v17.11

Release Notes

May 2017

This version of the software has been retired

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Version 17.11 Release Notes

This document provides important information regarding new features and changes in your Sage Estimating 17.11 software. Read these release notes carefully before installing Sage Estimating 17.11.

Restructured license packages

In keeping with the expanded functionality available in version 17.11 and to provide greater flexibility to our customers, Sage is restructuring the license packages offered for Sage Estimating (SQL). With this version, we are introducing a modular approach to licensing.

Used as a standalone application, the core Sage Estimating (SQL) is a powerful, flexible tool for estimating all types of construction products.

You can also purchase the following add-on modules to extend the functionality of Sage Estimating to suit the needs of your business:

- **Advanced Reporting**, which includes the Comparison Report, the Variance Report, and Custom Reports.
- **Crews**
- **ePlan Takeoff** (OST integration)
- **Models**

> **Note:** These modules are licensed separately from the Core Sage Estimating product. Certain capabilities, menus, and icons described in help are available only if you have purchased the associated module.

When you activate your product license on your license server, your Sage products and features are registered on and managed from that computer. The [[[Undefined variable Doc_Variables.LicenseAdmin]]] window displays the number of license uses (or concurrent users) for the Core product, and it lists any additional modules you have purchased.

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 82105, available at https://support.na.sage.com/selfservice/viewdocument.do?externalId=82105.

Note: While Sage Estimating 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 17.11 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 17.11. 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 17.11.

To upgrade your data:

1. Install Sage Estimating 17.11 following the instructions in the *Installation and Administration Guide*.
2. Start the Configuration wizard by selecting **Start** > **All Programs** > **Sage Estimating 17.11** > **Configuration Wizard**, or by clicking the desktop icon.

   In Windows 8.1 and Windows 10, select the **Configuration Wizard** tile on the Desktop, or right-click outside the tile area, and then click **All apps** > **Sage Estimating 17.11** > **Configuration Wizard**.
3. Follow the Configuration Wizard's on-screen instructions, and then 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 17.11 includes:

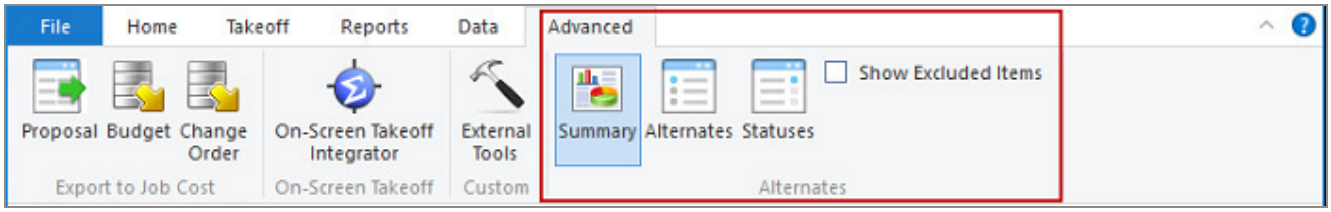
- Alternates
- Integration with Sage 100 Contractor (SQL)
- New data connector
- Revised WBS selection workflow
- Ribbon refinements
- Shortcut refinements for spreadsheet functions
- Other spreadsheet usability enhancements
- Estimate Information window enhancement
- Additional database and estimate reports
- Simplified Copy Estimate processes
- Support for non-unique estimate names
- Address book enhancements
- Performance improvements
- User assistance enhancements
- New license administration system

The following sections describe these changes in more detail.

Alternates that enable you to tailor estimates for customers

Version 17.11 enables you to prepare more versatile estimates that include optional pricing packages. The ability to define alternates enables you to tailor each estimate in response to specific financial concerns—a necessity for a competitive bid in today's construction environment.

A new **Advanced** tab on the Sage Estimating ribbon provides access to new windows you use to set up alternates for an estimate and to present the results to your customer.



- Click the **Alternates** icon on the Advanced tab to open the **Edit Alternates** window.

  You use the **Edit Alternates** window to define alternate packages that you want to provide to a customer.

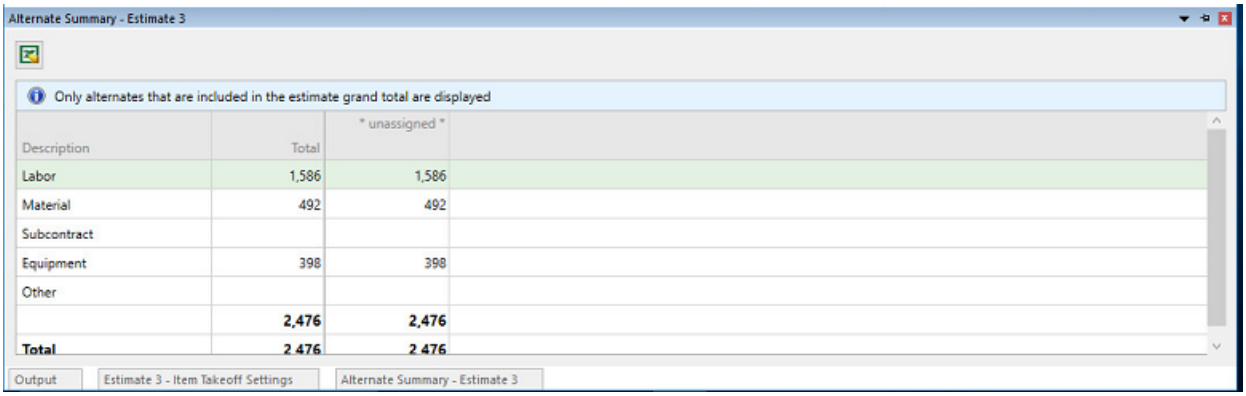
- Click the **Statuses** icon to open the **Edit Alternate Statuses** window.

  You use the new **Edit Alternate Statuses** window to define the state of your customer's commitment to include alternates in a job. For example, you might use "Proposed" to indicate that you or your customer has suggested an alternate, and "Accepted" to indicate that your customer has agreed to use this item for the job.

  When defining a status, you can designate an **Include?** attribute, which determines whether alternates assigned that status are included in estimate totals. It also enables you to present different views of an estimate. For example, when you prepare an estimate analysis for your customer, if you select the **Show Excluded Alternates** option (also on the Advanced tab), all alternate items are included in the estimate spreadsheet, regardless of whether they are associated with one of the Included statuses. If you do not select the option, only items that are included in estimate grand totals are displayed in the summary.

  > **Note:** The Show Excluded Alternates option is not available until you add alternates to the estimate.

- Click the **Summary** icon to display totals for alternate items in a summary pane (the example shown here uses simple, unassigned alternates):



The amounts displayed in this pane can vary depending on whether the alternates have an Included status type, and whether you selected the **Show Excluded Alternates** option on the Advanced tab.

> **Note:** The Summary icon and pane are not available until you add alternates to the estimate.

- You can export the Alternate Summary totals to an Excel spreadsheet that you can print for your customer.

  To export the Alternate Summary for the current estimate, you click the **Export to Excel** icon in the Alternate Summary pane.

Integration with Sage 100 Contractor (SQL)

Sage Estimating is now fully integrated with Sage 100 Contractor (SQL), enabling you to exchange Sage Estimating data with your Sage 100 Contractor accounting applications.

The Sage 100 Contractor Application Program Interface (API), which is installed automatically with your Sage 100 Contractor software, serves as the bridge between the two applications.

You must be a member of the API security group in Sage 100 Contractor to set up or use the integration between Sage Estimating and Sage 100 Contractor. (Security groups are assigned under **Company Security** in Sage 100 Contractor.)

> **Important!** To change user security settings in Sage 100 Contractor, you must be a company administrator for the company you are integrating with Sage Estimating.

When you integrate a Sage Estimating database with a Sage 100 Contractor company, jobs, cost codes, cost types, and vendors are imported into your Sage Estimating system, where they are available when you create estimates.

Integration also enables you to create proposals, budgets, and change orders from estimate data using Sage Estimating (SQL).

For details about how to integrate your Sage 100 Contractor and Sage Estimating applications, see the *Sage Estimating - Sage 100 Contractor (SQL) Integration Guide*.

New data connector

As part of an ongoing effort to integrate Sage Estimating more closely with Microsoft Excel, new import functions enable you to import information from an Excel file.

You can also use new export functions to export data to an Excel file, where you can edit it using common Excel functions, and then import it back into an estimate. These capabilities enable you to share data between estimates and estimators within your company.

The following windows provide [**Import**] and [**Export**] buttons for importing and exporting WBS code values, alternates, or statuses:

- **Edit Estimate WBS Values** and **Edit Database WBS Values** (use to import and export WBS code values).
- **Edit Alternates** (use to import and export lists of alternates).
- **Edit Alternate Statuses** (use to import and export lists of alternate statuses).

Both processes are straightforward and consistent. Also, both processes create log files that capture information about the changes to your estimate or database effected by the export or import. (For more information, see the respective windows.)

Revised WBS selection workflow

Redesigned WBS Values windows improve the process of viewing and selecting WBS values, and provide a streamlined process for editing existing lists of WBS values.

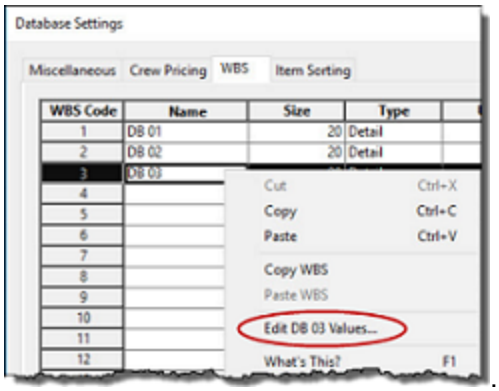
New **Select Estimate WBS Values** and **Select Database WBS Values** windows include a convenient grid that lists all the values that are defined for a selected estimate or database WBS code.

To select a value, you select it, and then press the **Enter** key or click the [**Select**] button--or you can simply double-click the value on the grid.

The selection windows provide an [**Edit**] button that you use to access the edit mode for the window, rather than launching a separate window, as in previous versions. In edit mode, you can easily add, delete, or rename WBS code values, or export them to or import them from an Excel file.

Tip: The ability to export and import database and estimate WBS values can facilitate the sharing of WBS values between estimators, databases, and estimates.

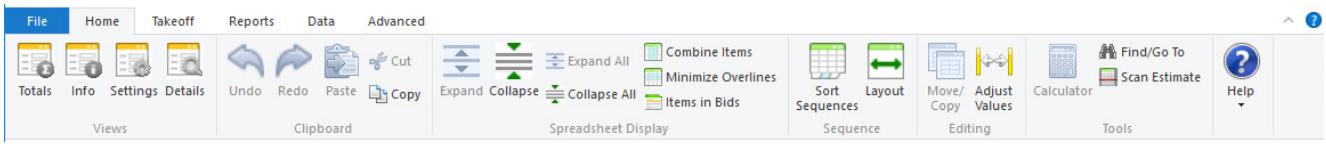
To display the **Edit WBS Values** or the **Select WBS Values** window (depending on where in the program you are working), you right-click in a WBS cell, and then click the **Edit <WBS Code> Values** or **Select <WBS Code> Values** option from the shortcut menu:



Ribbon refinements

In version 17.11, we reorganized items on the ribbon into logical groupings on tabs whose functions are more obvious. For example, all takeoff-related functions are now located on a new Takeoff tab.

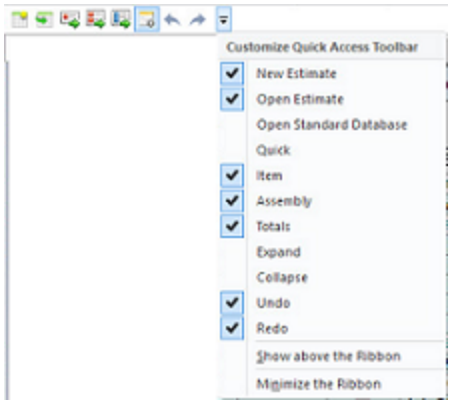
We have also added **Expand All** and **Collapse All** icons for viewing all the items in the current spreadsheet or summarizing them respectively.



If you were used to the ribbon in earlier versions, the Finding your way using the new ribbon help topic can assist you in navigating to windows, tools, and options from their new positions on the ribbon.

Tip: We suggest that you print the chart in this topic as a handy reference until you become familiar with the new ribbon.

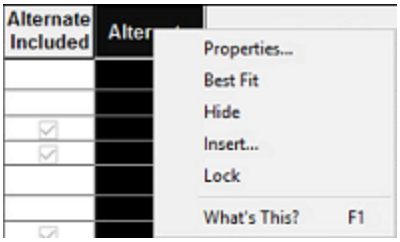
In addition, the Quick Access toolbar now includes a list of commonly used icons, enabling you to customize the toolbar easily, as shown here:



Shortcut refinements for spreadsheet functions

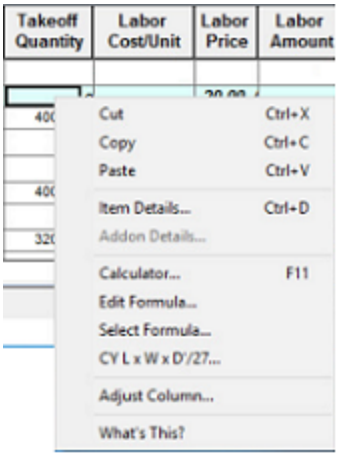
Redesigned shortcut (right-click) menus opened from the spreadsheet are now more closely associated with the context in which you display them, making common functions easier to find and use.

Example: Right-click a column heading to perform column adjustments

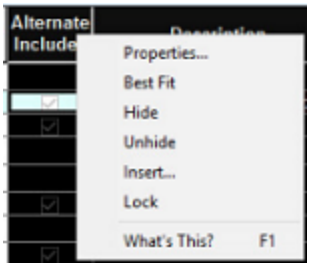


Example: Right-click the row header for an item to display item-specific functions

Example: Right-click a cell to view menu options related to that cell



Example: Right-click a range of columns that includes a hidden column if you want to display the hidden column



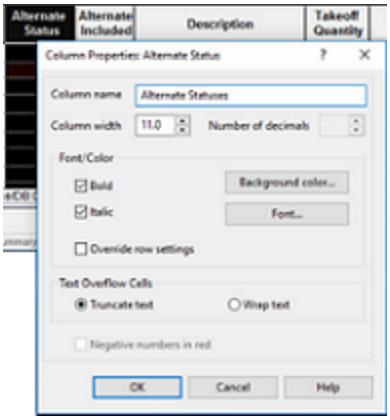
Other spreadsheet usability enhancements

- A new **Insert Columns** dialog box, which is accessible directly from the spreadsheet, lets you quickly modify the current layout. In previous versions, you had to use the **Unhide** shortcut option (assuming you knew the current position of the field) or open the **Edit Layout** window from the ribbon to view and position item fields.

  Now, you can simply right-click a column header on the spreadsheet, and then click **Insert** from the shortcut menu to open a new **Insert Columns** window. You can then select the columns you want to add to the spreadsheet from a list of available fields. For example, you can easily add the Allocated Addon field immediately to left of the Grand Total Amount field.

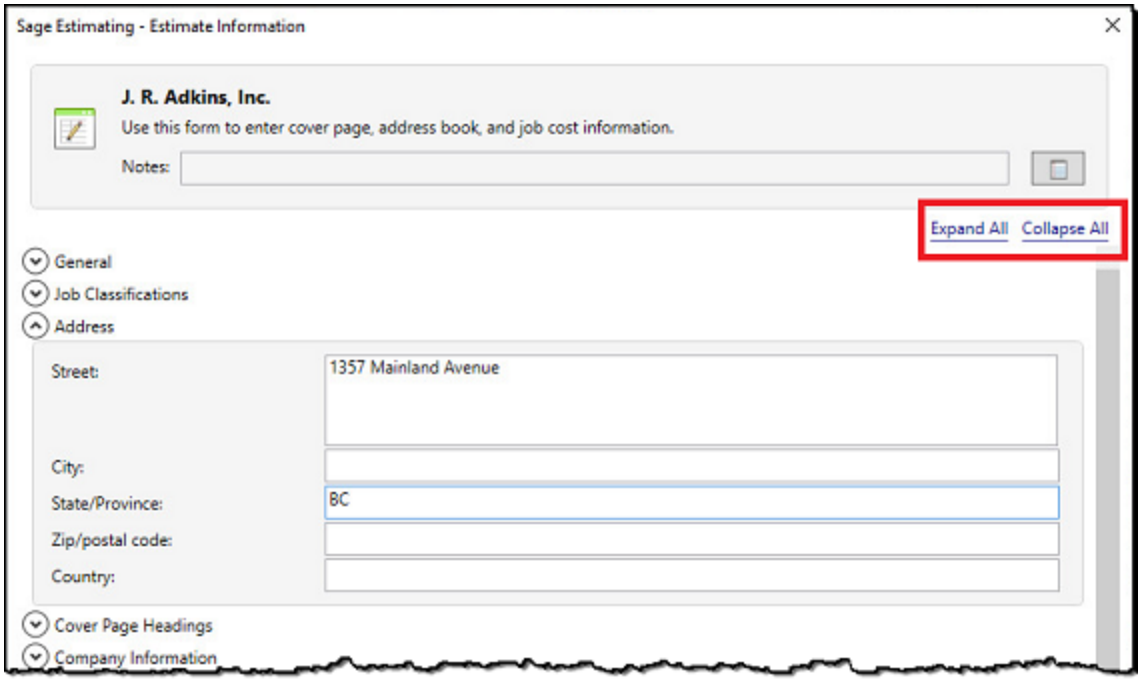
  Tip: You can either double-click a field to add a single field immediately to the spreadsheet, or click several fields (one at a time), and then click [**OK**] to add multiple fields to the spreadsheet. The new columns are inserted to the left of the current column.

- You can easily change the appearance of a spreadsheet column by double-clicking the column heading, and then adjusting the column properties in the **Column Properties** window.



Estimate Information window enhancement

With version 17.11, new **Expand All** and **Collapse All** buttons enable you to display or shrink sections of the Estimate Information window, making it easier for you to find the sections you want to view or edit.



Additional database and estimate reports

Sage Estimating includes more reports, including the following Estimate reports and Database reports:

Estimate reports

Report type	Report name
Takeoff Unit Costs and Unit Price reports	• Takeoff Unit Costs • Unit Price Review
BOM and audit reports	• Quote Sheet report • Detail Audit by Item
Price and Quantity reports	• Field report • Bill of Quantities • Unit Price Analysis

Report type	Report name
Bid Grid reports	• Selected Subcontractor • Who's Doing What Work

Database reports

Report type	Report name
Pricebook reports	• Price Book
Assembly reports	• Assembly Summary • Assembly Detail • Assembly Item Tables
Crew reports	• Crew Detail • Crew Summary • Crew Resource Rate Tables

Simplified Copy Estimate processes

We have simplified the process of copying estimates.

In the **Copy Estimate** window (opened by clicking **File > Copy Estimate** in the Estimating program), we have reorganized the fields in a logical order. Now, you specify:

1. A **Source Estimate** name. (If an estimate is open, the program displays the current estimate name in this box, but you can change it.)
2. A **Target Branch**.
3. The **New Estimate** name.

In the **Estimate Catalog** (available in the Estimating Management Console or the Manage Estimates window), you can now use a shortcut menu to create a copy of an existing estimate. In the tree view, right-click the estimate you want to copy, and then click **Copy** from the menu. Navigate to the location where you want to save the copied estimate, right-click the target folder, and then click **Paste**.

Support for non-unique estimate names

Multiple estimates can now have the same names–providing they exist in different locations in the Estimate Catalog. This means that when you copy an estimate to a different branch, you can preserve the recognizable estimate name without having to append "Copy" to the name, unless the estimate is a duplicate of an estimate on the same branch in the Estimate catalog.

Address book enhancements

- You can add an email address to a person record.
- You can add a primary Estimating contact for a company. The primary Estimating contact is used on some subcontractor reports.
- Trades subtypes for estimate subcontractor are migrated from Sage Estimating (Pervasive) and added to the master trade list in Sage Estimating.
- When adding a vendor on the fly, you no longer need to leave the keyboard and use the mouse to save the record. When you finish entering the information, simply press [**Enter**] to save your changes.

Tip: Help for the Address Book is now more easily accessible from the Help Contents panel, where it has a main heading.

Performance improvements

With version 17.11, Sage Estimating continues to reduce processing times. You should notice considerable improvements when performing Move/Copy and Copy/Paste operations. Also, Sage Estimating retrieves data more efficiently, resulting in faster processing.

User assistance enhancements

Restyled online Help with improved search capabilities

Beginning with version 17.11, Sage Estimating displays Help in your default browser. If you have an Internet connection, it displays the most current Help for your version of Sage Estimating available on our Sage Help server. Hosting help on a server enables Sage to update help without requiring you to update your software.

If you have no connection (you are working offline), it displays the Help that was current when the software was released. It is installed on your computer when you install Sage Estimating.

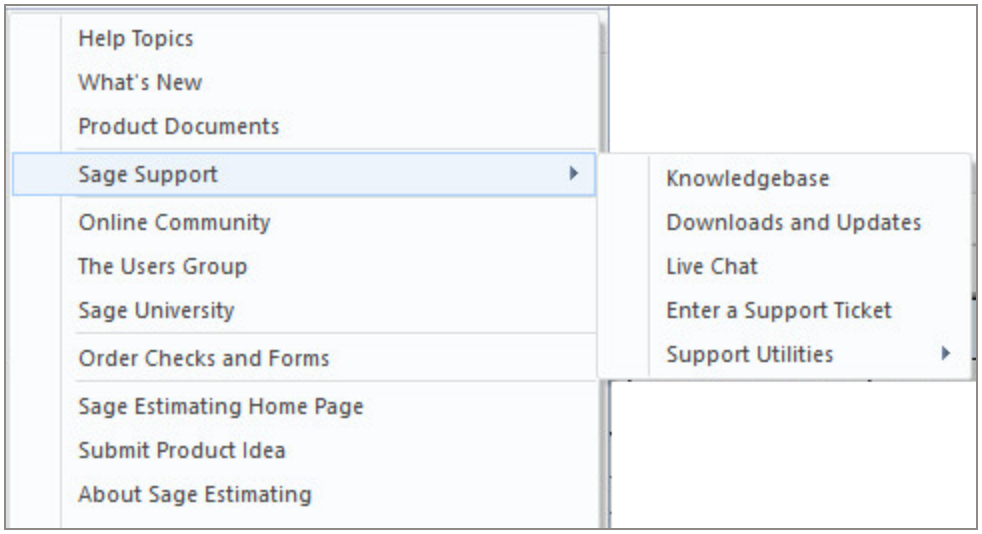
Important! Because the Microsoft Edge browser does not display locally installed help properly, we recommend that you select a different default browser when working offline.

Help for all Sage Estimating modules is available from a single convenient Contents panel. Once you display help for a module in your browser, you can easily find articles about any other module by using the new **Search** box at the top of the screen, or by using the Help **Contents** panel.

In addition, the new clean style of Help and PDF guides is designed to be easier for you to read.

Redesigned Help menus with quick access to more self-help resources

We have redesigned the Help options available from the ribbon and the File menu in the Sage Estimating program. You are only a couple of clicks away to an array of self-help resources. These are the Help links you will find on the File menu in version 17.11:



New license administration system

Licensing for Sage Estimating no longer relies on a Sentinel USB device or the SafeNet/Gemalto License Manager.

Sage Estimating has implemented a new web-based licensing and entitlement system. The new licensing system uses your Sage client ID and registration information, rather than USB keys or other devices used in earlier versions, to verify your entitlement to the software.

Important! Any version of Sage Estimating earlier than version 16.12 (a limited pre-release version) will not work with the License Administration program described here.

To manage your licenses, you use a new License Administration program, which is installed automatically with the Sage Estimating software. After installation, you can use the Sage Estimating Configuration Wizard, which has been updated to take advantage of the new licensing features, to acquire licenses for individual workstations.

After installing Sage Estimating on a server and individual workstations:

1. On the server, use the **License Administration** window to designate a computer on your network as the Sage license server, which will regulate and monitor license uses. The license server should maintain a constant connection to the Internet so that Sage Estimating users can acquire license uses when they need them.

   You also enter and send registration information to Sage to activate the licenses for the products you have purchased.

2. On workstations, individual users connect their Sage Estimating installations to the Sage license server using the **Configuration Wizard**.

   Sage Estimating users must either acquire a license through the Sage license server or use **Demo Mode** before they can use the software.

   Demo Mode is a limited license that is valid for a short period of time so that you can try out the software. This option is available in the Configuration Wizard until you activate a license.

   Tip: If a user will be offline for a time, they can also check out a license use. Checking out a license reduces the number of license uses available to other Sage Estimating users until the license is checked back in. (In Sage Estimating, you click **File > Check Out License Use** or **File > Check in License Use**.) For detailed information about checking out a license for offline use, see the *Installation and Administration Guide*.

For more detailed information on installing and configuring Sage Estimating version 17.11, see the *Installation and Administration Guide*.

Fixes Since the Previous Version

Version 17.11 includes the following fixes:

- You can connect to a SQL Server instance using a Microsoft account.
- You can copy and paste a row into Microsoft Excel.
- Shared layouts created on one machine are displayed correctly on other machines.
- You can run custom reports on upgraded estimates.
- When you review passes for a merged or copied estimate that contains multiple passes, only the pass you select is highlighted in the list pane.

Known Issues

You cannot install Microsoft SQL Server from a folder that has a long path

If you start the Sage Estimating installer from a path that is longer than 100 characters, you will receive the error “Exit Code 9 The storage control block address is invalid” in the log file when you install the software.

To avoid this error, move the Install folder higher up in the tree (closer to the root folder).

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.

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

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**.