



Sage Estimating (SQL) v17.12

Release Notes

October 2017

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

This is a publication of Sage Software, Inc.

© 2017 The Sage Group plc or its licensors. All rights reserved. Sage, Sage logos, and Sage product and service names mentioned herein are the trademarks of The Sage Group plc or its licensors. All other trademarks are the property of their respective owners.

Last updated: October 23, 2017

Contents

Version 17.12 Release Notes	1
Installation Notes	2
System Requirements	2
Installing Sage Estimating	2
New Features and Enhancements	3
Expanded Copy Assembly functionality	3
Automatic overline quantity calculations	5
New, modernized selection windows	8
New data connector functionality	9
Synchronization with source lists	10
Spreadsheet enhancements	10
Improved Report Manager	10
Expanded field widths	11
Improved performance	12
Refined license administration	12
Security changes	12
Miscellaneous improvements	13
Fixes Since the Previous Version	14
Known Issues	16
You cannot browse to a desired location in the Standard Database Catalog when creating a new standard database	16
You cannot install Microsoft SQL Server from a folder that has a long path	16
Checking in a Standard Database from the Database Editor Closes the Database for Concurrent Users	16

Further Assistance 17

 Online Help17

 Training17

 Technical Assistance 17

 Submitting Enhancement Requests 17

Version 17.12 Release Notes

This document provides important information regarding new features and changes in your Sage Estimating 17.12 software. Read these release notes carefully before installing Sage Estimating 17.12.

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 86064, available at <https://support.na.sage.com/selfservice/viewdocument.do?externalId=86064>.

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.

Installing Sage Estimating

Refer to the *Installation and Administration Guide* for complete instructions on installing the software, and migrating or upgrading your data.

Before Upgrading

Important!

If you are upgrading to version 17.12 and you are using third-party software that integrates with Sage Estimating, check with the third-party software vendor to ensure that their software is compatible with version 17.12 before you upgrade.

New Features and Enhancements

Sage Estimating version 17.12 includes:

- [Expanded Copy Assembly functionality](#)
- [Automatic overline quantity calculations](#)
- [New, modernized selection windows](#)
- [Extended data connector functionality](#)
- [Synchronization with source lists](#)
- [Spreadsheet enhancements](#)
- [Improved Report Manager](#)
- [Expanded field widths](#)
- [Improved performance](#)
- [Refined license administration](#)
- [Security changes](#)
- [Miscellaneous improvements](#)

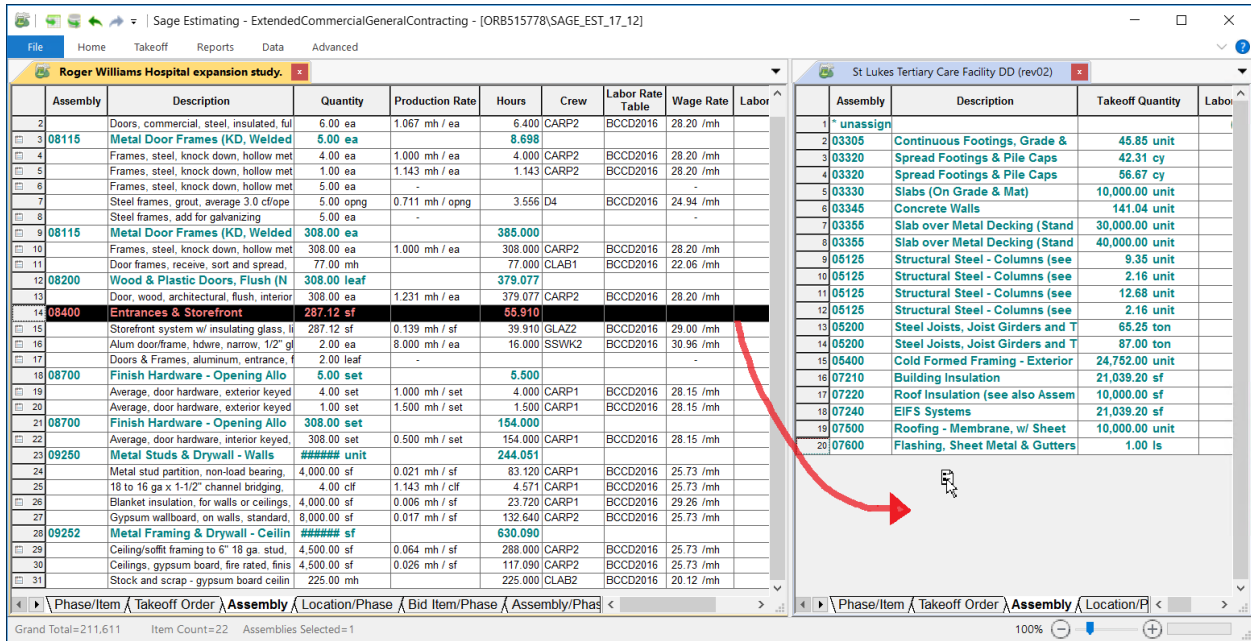
The following sections describe these changes in more detail.

Expanded Copy Assembly functionality

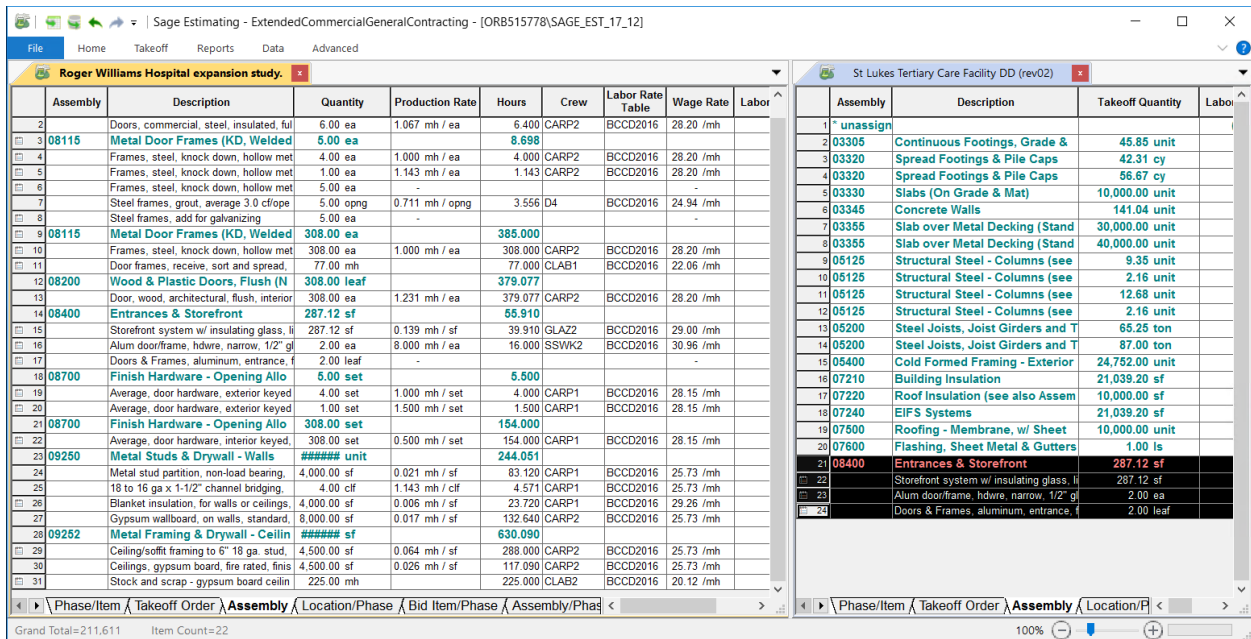
Previous versions of Sage Estimating enabled you to copy an assembly within an estimate to avoid repeating assembly takeoff. This feature, designed to boost your productivity, is especially valuable for projects where assemblies are distributed across common systems—for example, multiple hotel bathrooms that require the same assemblies on each floor.

Now, version 17.12 allows you to copy assemblies *between* estimates, saving you considerable time and effort. You no longer face the tedium of matching takeoff variable inputs or customizing the generated items—nor do you have to settle for copying a collection of items, losing valuable review assembly information in the process.

As with copying items, you simply select an assembly overline from the estimate spreadsheet, and then drag it to the target estimate.



When you drop the assembly, the assembly and all its details appear in the new estimate.



Note: This feature is currently available from any spreadsheet sequence where Assembly is defined as the parent grouping level.

For more information about copying assemblies, see the Estimating help.

Automatic overline quantity calculations

Any estimator who has needed to summarize an estimate's material quantities knows that it is a labor-intensive process that often requires either a lot of calculator work or the manipulation of exported item data.

In earlier versions, you had to enter static overline quantities, updating them manually as the scope of the estimate changed.

Version 17.12 spares you this tedious work. Now you can rely on the overline quantities to provide this critical information.

	Group	Phase	Item	Description	Quantity
4	08-11-00.00			Metal Doors And Frames	ea
5		08-11-16.10		Entrance Doors	ea
6			1600	Doors & Frames, aluminum, entrance, for concealed panic device, incl. stan	2.00 leaf
7			3060	Alum door/frame, hdwre, narrow, 1/2" glazing, lt. bronze/black, 3070	2.00 ea
8	08-12-13.00			Hollow Metal Frames	ea
9		08-12-13.13		Standard Hollow Metal Frames	ea
10			0100	Frames, steel, knock down, hollow metal, single, 16 ga., up to 5-3/4" deep,	4.00 ea
11			0100	Frames, steel, knock down, hollow metal, single, 16 ga., up to 5-3/4" deep,	308.00 ea
12			0140	Frames, steel, knock down, hollow metal, double, 16 ga., up to 5-3/4" deep,	1.00 ea
13			4900	Frames, steel, knock down, hollow metal, for welded frames, add	5.00 ea
14			4950	Steel frames, grout, average 3.0 cf/opening	5.00 png
15			6500	Steel frames, add for galvanizing	5.00 ea
16			9090	Door frames, receive, sort and spread, per manhour	77.00 mh
17	08-13-13.00			Hollow Metal Doors	ea
18		08-13-13.13		Standard Hollow Metal Doors	ea
19			1760	Doors, commercial, steel, insulated, full panel, 18 ga., 3'-0" x 7'-0" x 1-3/4" t	6.00 ea
20	08-14-16.00			Flush Wood Doors	ea
21		08-14-16.09		Smooth Wood Doors	ea
22			2180	Door, wood, architectural, flush, interior, 5 ply particle core, birch face, 1-3/8"	308.00 ea
23	08-43-13.00			Aluminum-Framed Storefronts	sf
24		08-43-13.20		Storefront Systems	sf
25			1750	Storefront system w/ insulating glass, light bronze or black, prem.	287.12 sf
26	08-71-20.00			Hardware	set
27		08-71-20.15		Hardware	set
28			5030	Average, door hardware, interior keyed, single	308.00 set
29			5065	Average, door hardware, exterior keyed, single, w/ panic	4.00 set
30			5075	Average, door hardware, exterior keyed, pair, w/ panic	1.00 set

Grand Total=211,611 Item Count=22 100%

Now, when you select the new **Automatically calculate quantities** check box (available on the Miscellaneous tab of the Estimate Settings window), the program calculates summary quantities based on units of measure and displays them in the overline quantity cells of the spreadsheet.

	Group	Phase	Item	Description	Quantity
4	08-11-00.00			Metal Doors And Frames	2.00 ea
5		08-11-16.10		Entrance Doors	2.00 ea
6			1600	Doors & Frames, aluminum, entrance, for concealed panic device, incl. stan	2.00 leaf
7			3060	Alum door/frame, hdwre, narrow, 1/2" glazing, lt. bronze/black, 3070	2.00 ea
8	08-12-13.00			Hollow Metal Frames	323.00 ea
9		08-12-13.13		Standard Hollow Metal Frames	323.00 ea
10			0100	Frames, steel, knock down, hollow metal, single, 16 ga., up to 5-3/4" deep,	4.00 ea
11			0100	Frames, steel, knock down, hollow metal, single, 16 ga., up to 5-3/4" deep,	308.00 ea
12			0140	Frames, steel, knock down, hollow metal, double, 16 ga., up to 5-3/4" deep,	1.00 ea
13			4900	Frames, steel, knock down, hollow metal, for welded frames, add	5.00 ea
14			4950	Steel frames, grout, average 3.0 cf/opening	5.00 opng
15			6500	Steel frames, add for galvanizing	5.00 ea
16			9090	Door frames, receive, sort and spread, per manhour	77.00 mh
17	08-13-13.00			Hollow Metal Doors	6.00 ea
18		08-13-13.13		Standard Hollow Metal Doors	6.00 ea
19			1760	Doors, commercial, steel, insulated, full panel, 18 ga., 3'-0" x 7'-0" x 1-3/4" t	6.00 ea
20	08-14-16.00			Flush Wood Doors	308.00 ea
21		08-14-16.09		Smooth Wood Doors	308.00 ea
22			2180	Door, wood, architectural, flush, interior, 5 ply particle core, birch face, 1-3/8"	308.00 ea
23	08-43-13.00			Aluminum-Framed Storefronts	287.12 sf
24		08-43-13.20		Storefront Systems	287.12 sf
25			1750	Storefront system w/ insulating glass, light bronze or black, prem.	287.12 sf
26	08-71-20.00			Hardware	313.00 set
27		08-71-20.15		Hardware	313.00 set
28			5030	Average, door hardware, interior keyed, single	308.00 set
29			5065	Average, door hardware, exterior keyed, single, w/ panic	4.00 set
30			5075	Average, door hardware, exterior keyed, pair, w/ panic	1.00 set

Grand Total=211,611 Item Count=22 100%

Matching units are summarized in overline totals

Overline summary quantities are derived by comparing the unit value of a given overline to the takeoff units of the corresponding estimate items.

The takeoff quantities of each matching item are aggregated, with the result appearing in the overline quantity cell. Because the calculation depends on an exact, case-sensitive match, you can add or remove item quantities from the aggregate amount simply by altering the Unit. This example shows how you can exclude the quantity for an added item by using an uppercase "EA":

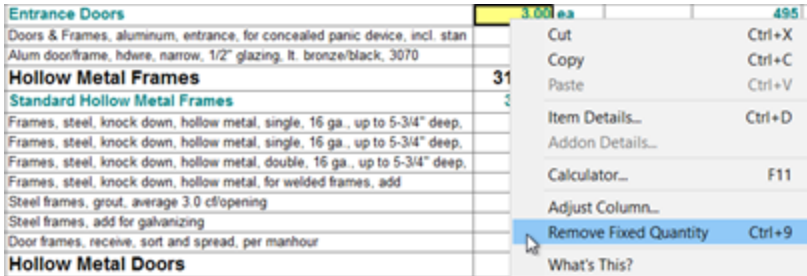
8	08-12-13.00			Hollow Metal Frames	318.00 ea
9		08-12-13.13		Standard Hollow Metal Frames	318.00 ea
10			0100	Frames, steel, knock down, hollow metal, single, 16 ga., up to 5-3/4" deep,	4.00 ea
11			0100	Frames, steel, knock down, hollow metal, single, 16 ga., up to 5-3/4" deep,	308.00 ea
12			0140	Frames, steel, knock down, hollow metal, double, 16 ga., up to 5-3/4" deep,	1.00 ea
13			4900	Frames, steel, knock down, hollow metal, for welded frames, add	5.00 EA
14			4950	Steel frames, grout, average 3.0 cf/opening	5.00 opng
15			6500	Steel frames, add for galvanizing	5.00 ea
16			9090	Door frames, receive, sort and spread, per manhour	77.00 mh

As you add items to the estimate or change existing item quantities, the program recalculates overline quantities automatically.

Overriding overline quantities

You can also enter an overline quantity manually, overriding the calculated quantity. The overridden values are highlighted and use the same formatting as category amounts you enter elsewhere in the estimate spreadsheet.

Should you want to restore the automatic calculation, you can easily do so by right-clicking the cell, and then clicking **Remove Fixed Quantity** from the shortcut menu.



New, modernized selection windows

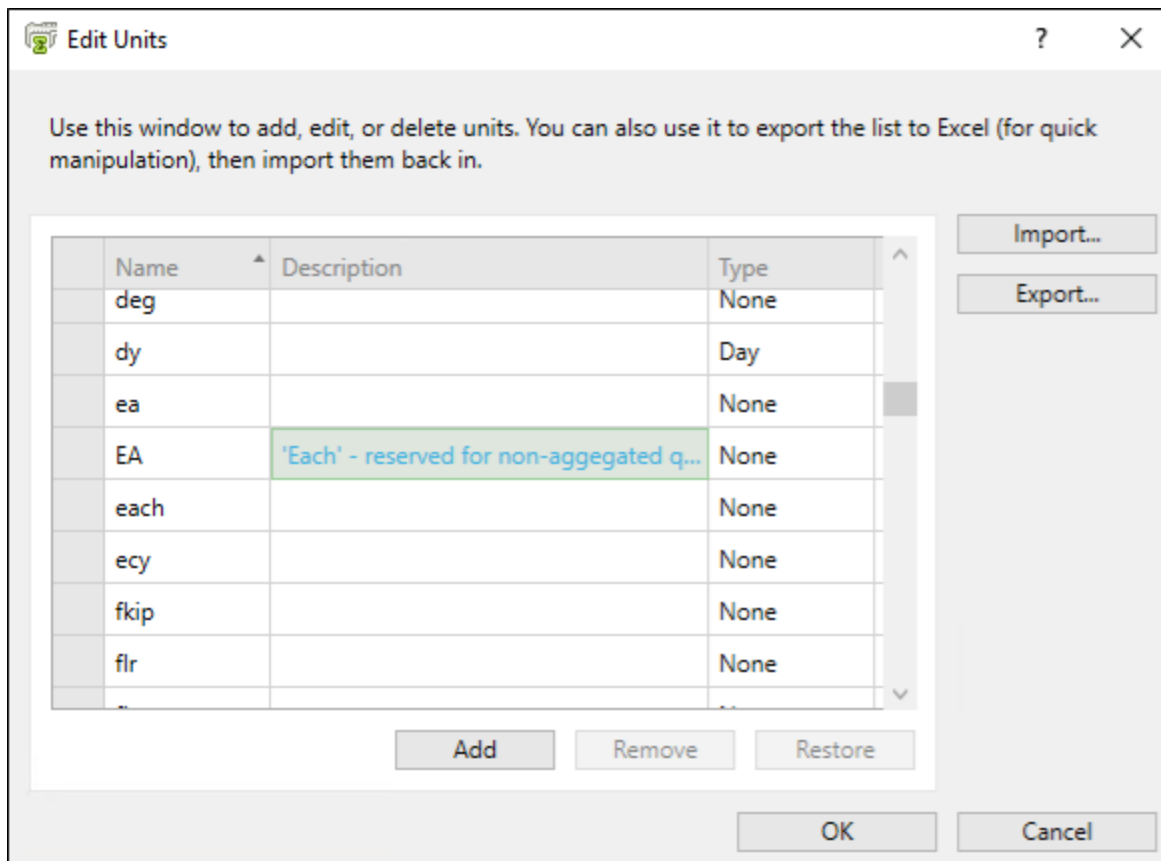
Continuing to modernize common workflows, we have updated the following Select and Edit windows as we did for WBS values in version 17.11:

- Units
- Locations
- Subcategories

It is now easier to view both the estimate and database lists and to assign values to estimate items and other records. The Edit windows provide a modern grid that enables you to edit existing records more efficiently. In addition, when you rename values, you can also choose to propagate the renamed values to all the estimate assignments, which was not possible with previous versions.

Unit description exposed

Respecting the significance of unit values in estimating, we have now added a new **Unit Description** field to the Unit table. This description can provide additional information about how to apply the unit value.



Tip: You can view a unit description by hovering over an assigned unit in the estimate spreadsheet.

New data connector functionality

Version 17.11 introduced the ability to import and export lists of WBS values to and from Microsoft Excel. In version 17.12, we have extended this integration to the following additional lists:

- Units
- Locations

- Subcategories

After you export values to an Excel workbook, you can easily edit the values in the workbook, and then import your changes into the same estimate or, in template fashion, into other estimates. You can also import data from a fixed-format file.

Import and export processes are straightforward and consistent. As for WBS values, data is validated and highlighted during the import operation. The import and export processes also create log files that list the changes to your estimate or database and capture any exceptions.

For more details about this feature, see the help associated with each Import or Export window.

Synchronization with source lists

Besides the efficient management and selection of list values (such as locations, WBS values, and alternate statuses), version 17.12 also reconciles lists when you change the estimate.

For example, in previous releases, you could remove a value from the estimate WBS value list even if it was assigned to an estimate item. Now, if a WBS, Alternate, Alternate Status, Unit, Location, or Subcategory value is assigned to an estimate item, it will always exist in the estimate's value list.

Before you can remove an assigned value from the estimate's value list, you must remove or reassign the value from any estimate item assignments.

Spreadsheet enhancements

In version 17.12, spreadsheet enhancements continue to improve estimators' productivity.

Clearing a value in the estimate spreadsheet is now as easy as clicking the **[Delete]** key, consistent with Microsoft Excel behavior.

Alternatively, you can right-click the value, and then click **Remove Values** from the shortcut menu. When you use the shortcut menu to remove a value, you remove the value from all assignments on the current estimate. You can also choose to remove the value from the corresponding source estimate's value list.

Improved Report Manager

Custom reporting is improved in Report Manager in version 17.12.

Report designer databases are no longer created automatically for all users. These databases are created only when a report developer generates sample design data in the Estimating Management

Console. The result is a less cluttered set of report designer databases in your SQL instance, making database administration easier.

You will also notice the following additions to the reportable views:

- New **Allocated Addons** fields for each of the cost categories in the Estimate Item table.
- New plain text equivalent fields for all rich text notes fields.
- A new **Model Line** table.
- The **Unit** table now includes a Unit Description field.

Expanded field widths

In response to development partner requests, version 17.12 includes technical improvements. For example, we have expanded the WBS Value field so that you can store more detailed item-level information.

The following table lists specific changes:

Type	Field	Old length	New length
Addon	Description	30	50
Addon	Number	2	6
Alternate	Description	150	260
Alternate	Name	20	50
Alternate Status	Name	20	50
Assembly	Description	70	260
Company	Email Address	50	254
Item	BOM Description	50	260
Item	Description	150	260
Item Table	Name	20	70
Location	Name	15	50
Material Class	Name	20	50
Person	Email Address	50	254

Type	Field	Old length	New length
Phase	Description	150	260
Unit	Name	4	8
WBS Value	Description	70	260
WBS Value	Value	20	50

Improved performance

Sage Estimating continues to reduce processing times, particularly when accessing database information. In addition:

- We have optimized the Review Assembly function for large estimates.
- You can select estimates more quickly when using the Merge Estimates function.
- The Delete Estimate function is more efficient.
- Displaying the price book report is faster.

Refined license administration

Version 17.12 includes several improvements to the License Administration program.

You now receive a warning before you deauthorize the license server to avoid accidentally locking licenses.

The License Administration log now includes more information to track license check-ins and check-outs and for tracing licensing errors.

You may also notice performance improvements when checking out a license for offline use.

Security changes

For new installations of Sage Estimating, users can now view and edit all estimates by default.

In contrast with previous versions, to apply security to individual estimates, the administrator must now clear **Allow all users to view and edit all estimates** in the Estimating Management Console.

There is no change to existing installations, where the existing security setting continues to apply.

Miscellaneous improvements

Version 17.12 includes the following additional improvements:

- Means Integrator accepts factors (such as *2 or /3) applied to surrogate keys and item codes when you enter price update codes.
- For new installations only, windows that you can dock below the estimate spreadsheet now float, by default, when you first open them. This new behavior affects the **Totals**, **Estimate Details**, **Default Values**, **Alternate Summary**, and **Output** windows. You can dock the windows, if you prefer.
- Items in the **Takeoff Order** spreadsheet sequence are no longer grouped by Assembly Name. This change enables you to see all items ordered by takeoff date and time, regardless of their affiliation with assemblies.

Fixes Since the Previous Version

Version 17.12 includes the following fixes:

- When migrating data from Estimating (Pervasive), the program now resolves Registration Names longer than 30 characters.
- You no longer receive an error message saying "Index and length must refer to a location within the string" when you migrate an Options file from Estimating (Pervasive).
- We removed the SQL Server setting from the **Settings** panel in Data Migration. This setting is no longer required during migration, and occasionally caused an issue when switching address books.
- If you are running Estimating in a workgroup, the program now includes the domain or machine name portion when evaluating your SQL user ID. This enables Estimating to differentiate between similar IDs when you restore data from different domains.
- When you start Sage Estimating, you are automatically enrolled as a user for the SQL Server instance, providing Security is not turned on.
- When you delete a user in the Estimating Management Console, their associated report design database is also deleted.
- When OST is not installed, the OST icon no longer appears on the ribbon (and in classic view, the OST item does not appear on the menu).
- Items are now listed correctly when you sort items by Group Phase only.
- The shortcut menu on the spreadsheet no longer provides an item for editing the cost index on an estimate. Now, to edit a cost index for an open estimate, you click **Data** tab > **Miscellaneous** > **Cost Indexes**.
- You no longer receive a foreign key error when you type a unit in the Phase, Formula, or Variable window for a standard database, and then press **[Enter]**.
- You no longer receive an out-of-bounds array error that causes the Review Assembly function to stop working.
- The Estimating spreadsheet is updated automatically when you edit a WBS Description for an estimate.
- On the Totals Page, if you use alternates for an estimate, the "Total with included alternates"

statement now uses one line that wraps, if necessary.

- You can now see all price code categories in the Price Update by Price Code window.
- Address book data is now generated properly when you run a custom report in Estimating and when you data generate for report design in the Estimating Management Console.
- In the Estimating Management Console, the **[Edit]** buttons for the client, architect, and engineer companies and contacts are available only when you specify the company or contact.
- Merge Estimates no longer adds duplicate group assemblies to an estimate.
- You no longer receive a communication error when you launch Estimating from the Estimating Management Console.
- In the Database Editor, you can open a Standard database that is integrated with Sage 100 Contractor.

Known Issues

You cannot browse to a desired location in the Standard Database Catalog when creating a new standard database

The **Create New Standard Database** window prevents you from using the **Browse** feature to select a desired location for the new database.

However, you can type the branch path to enter the location manually while you are creating the database, or you can move the branch to the desired location after you create the database.

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**.