



# Sage Estimating (SQL) v18.11

## Release Notes

July 2018

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# Version 18.11 Release Notes

This document provides important information regarding new features and changes in your Sage Estimating 18.11 software. Read these release notes carefully before installing Sage Estimating 18.11.

# 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 91688, available at <https://support.na.sage.com/selfservice/viewdocument.do?externalId=91688>.

**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 18.11 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 18.11 before you upgrade.

# New Features and Enhancements

Sage Estimating version 18.11 includes the following significant improvements:

- [Improved sort sequences and item sequences](#)
- [Improved spreadsheet layouts](#)
- [Unit conversions](#)
- [Added Assembly column on the spreadsheet](#)
- [Ability to add or edit items from the Item Table List](#)
- [Ability to create or edit a variable "on the fly" from the Variable List](#)
- [Ability to add or edit formulas from the Formula List](#)
- [Ability to copy standard databases and address books](#)
- [Ability to fill down overline values to items](#)
- [Improved Report Manager](#)
- [More enhancements to the ribbon menus](#)

In addition, it includes the following miscellaneous improvements:

- [Disabled Common Language Runtime in SQL Server off for new installations](#)
- [Other changes and improvements](#)

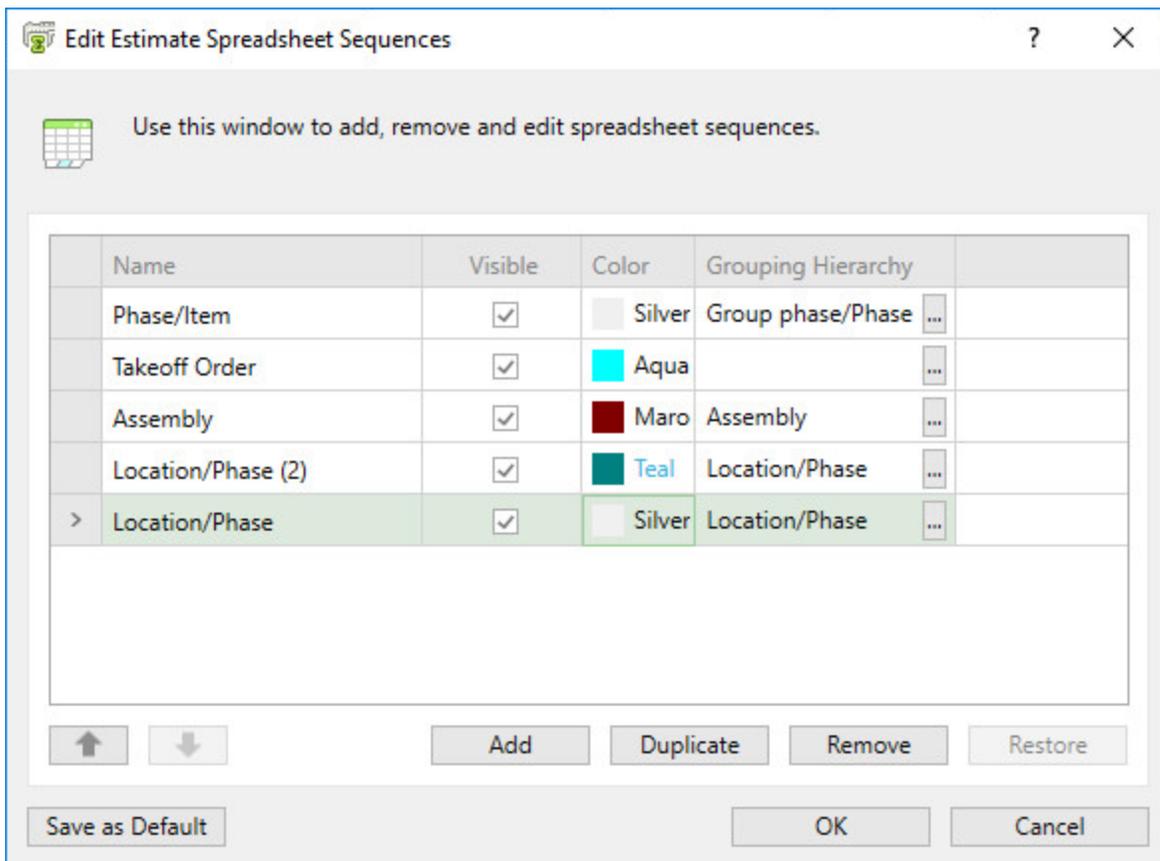
The following sections describe these changes in more detail.

## Improved sort sequences and item sequences

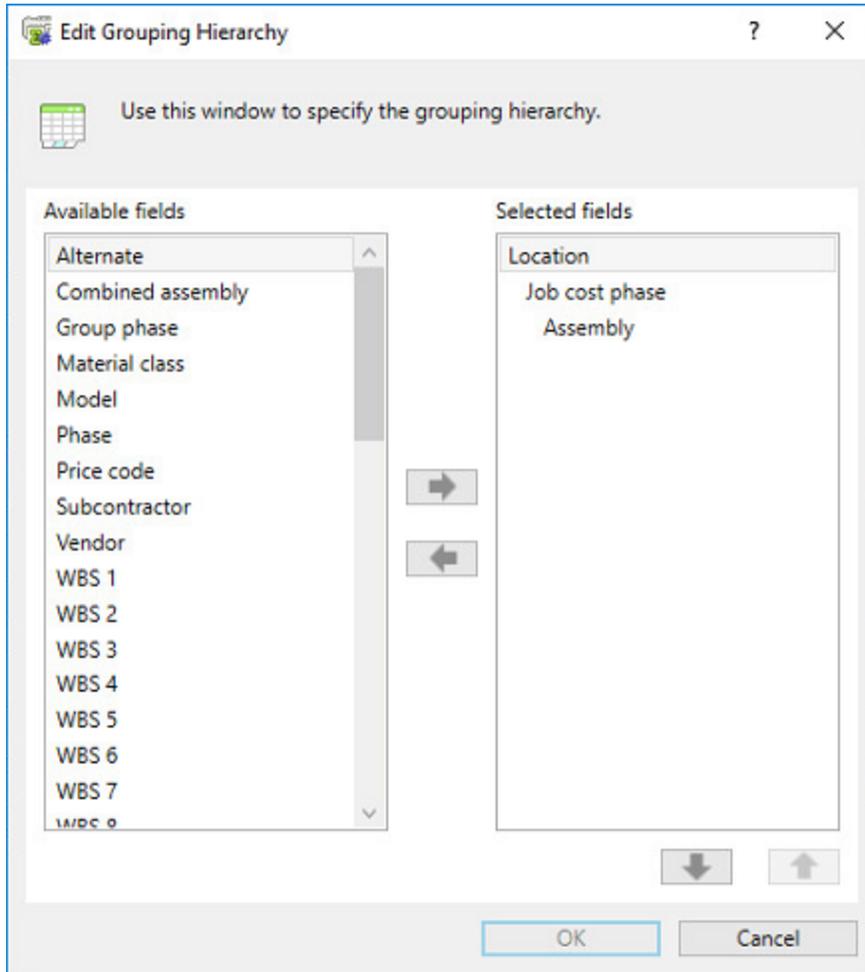
### Unlimited sort sequences

With version 18.11, you are no longer limited to the sort sequences that come with Sage Estimating. You can now create and share as many sort sequences as you want to display estimate information.

A new **Edit Estimate Spreadsheet Sequences** window provides a modernized interface that enables you to easily add or remove sequences, or duplicate an existing sequence. All the spreadsheet sequences for the estimate are listed in a grid, where you can edit the sequence names, change the color for the sequence, specify whether a particular sequence appears in the spreadsheet, and change the order in which the sequence tabs appear:

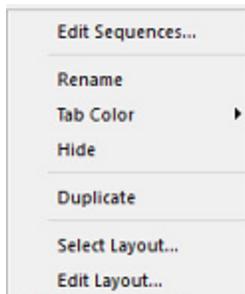


From this window, you open a new **Edit Grouping Hierarchy** window, where you define the sort levels to include in each sequence:



**Note:** The new **Edit Standard Item Sequences** window and its corresponding **Grouping Hierarchy** window are very similar, except that they offer sorting levels appropriate for items.

In addition, you can now use a new shortcut menu (available when you right-click a sequence tab) to specify attributes for a sequence tab "on the fly," or to open the **Edit Estimate Spreadsheet Sequences** window:



For more information about setting up sort sequences, see the Estimating help.

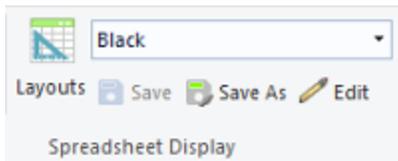
## Improved spreadsheet layouts

In v18.11, we simplified the process of editing and applying spreadsheet layouts.

New ribbon icons now provide direct access to several Layout functions, making it much easier to:

- Select a layout from a list of layouts, applying it immediately to the current estimate.
- With a single click, save changes you made to the current spreadsheet display "on the fly."
- Save the current layout using a different name.
- Open the current layout directly in a new Edit Spreadsheet Layout Details window.

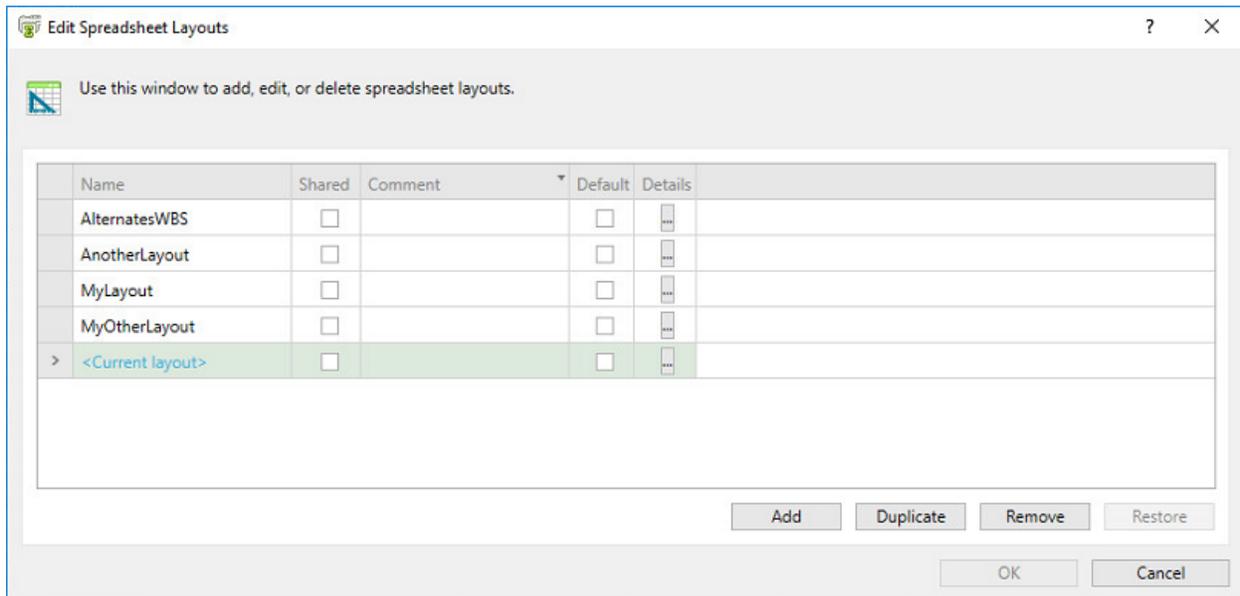
These icons are located in a new Spreadsheet Display group on the Home tab:



**Important!** Spreadsheet layouts are no longer tied to a single spreadsheet sequence. You can apply your layouts to any sequence in your estimates, and you can add or edit layouts even when no estimates are open.

## The new Edit Spreadsheet Layouts windows

We have replaced the Modify Layouts window with a new, modernized **Edit Spreadsheet Layouts** window with innovations similar to the modernized Edit WBS Values, Edit Locations, and Edit Subcategories windows introduced in recent versions.



You use the **Edit Spreadsheet Layouts** window to:

- View a list of existing layouts (shared and personal) that are available to you.
- Add a new layout.
- Open a new Edit Spreadsheet Layout Details window to define layout details.
- Remove an existing layout, or restore a layout you removed. (You can restore a layout only if you have not yet closed the window since deleting the layout.)
- Share a selected custom layout with other Sage Estimating (SQL) users, or simply keep it for your own use.

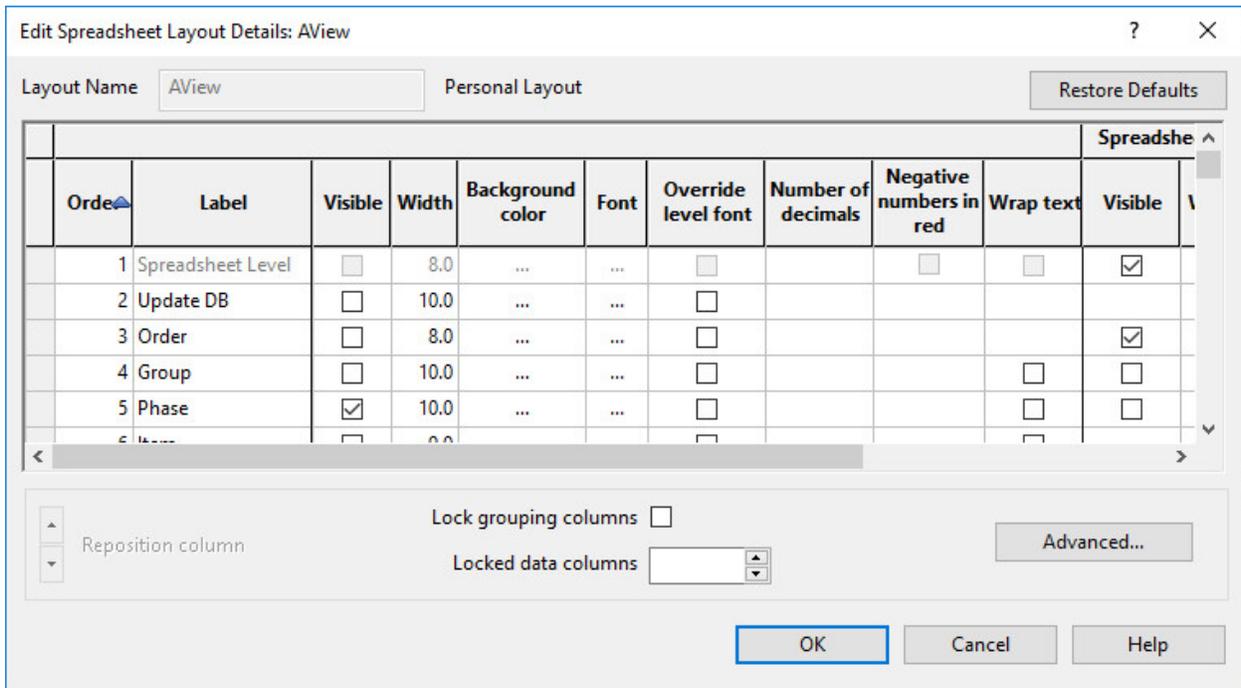
**To open the Edit Spreadsheet Layouts window:**

- On the ribbon, from the **Spreadsheet Display** group on the **Home** tab, click **Layouts**.
- In classic view, click **View > Spreadsheet Layout**, or click  on the toolbar.

**Note:** You are no longer prompted to save layout changes when you close the **Edit Spreadsheet Layouts** window (formerly Modify Layouts window).

You use the new **Edit Spreadsheet Layout Details** window to define a new or existing layout, or to duplicate an existing layout.

You open this window by clicking the ellipsis [⋮] button on the Edit Spreadsheet Layout window for the layout you want to edit.



For more information about defining layouts using this new workflow, see the Estimating help.

## Unit conversions

Sage Estimating (SQL) v18.11 enables you to convert unit quantities from imperial to metric (or metric to imperial), and to display converted quantities within an estimate.

Sage Estimating includes predefined unit conversions, but you can add your own conversions, and edit or remove existing built-in conversions. You use the new **Edit Unit Conversions** window to specify conversion factors to use when converting defined units of measure from imperial to metric, and from metric to imperial units.

When you want to convert and display estimate quantities from the current measurement system to imperial or metric, select the **Convert quantities to** check box on the Miscellaneous tab of the Estimate Settings window.

Sage Estimating (SQL) then:

- Automatically converts the estimate to the system of measurement you select, calculating amounts using the conversion factors you specify in the **Edit Unit Conversions** window.
- Displays an additional set of columns in the spreadsheet that shows the converted quantities and prices. (The conversions are marked by asterisks in the column headings.)

For more information, see the Estimating help.

## Added Assembly column on the spreadsheet

In version 17.13, to prepare for improvements to sort sequences in version 18.11, we removed the Assembly overline from sort sequences. Because assembly overlines were no longer available in the spreadsheet, our customers could no longer review assemblies from the spreadsheet.

In version 18.11, we have restored the assembly column so that you can again review assemblies from the spreadsheet.

Thank you Paul D. for this suggestion!

## Ability to add or edit item tables from the Item Table List

You can now quickly edit or create an item table before you assign it in the Edit Assembly window. You no longer have to leave the Edit Assembly window in the middle of a takeoff, open the Database Item Table window, and then add or edit the item table you want to assign to the assembly takeoff.

When you open the **Item Table List** from the Edit Assembly window, the following two new buttons provide direct access to item tables:

- Click [**Create Item Table**] if you want to create a new table.
- Click [**Edit Item Table**] if you want to edit a selected existing table in the Edit Item Table window.

You can also use the following shortcuts to open the Edit Item Table window:

- Right-click the list of item tables, and then select the **Create Item Table** or **Edit Item Table** option from a shortcut menu.
- Press **Alt-E** to edit a selected table.
- Press **Alt-C** to create a new table

When you next open the Item Table window, it displays the last item table that you created or edited as the default.

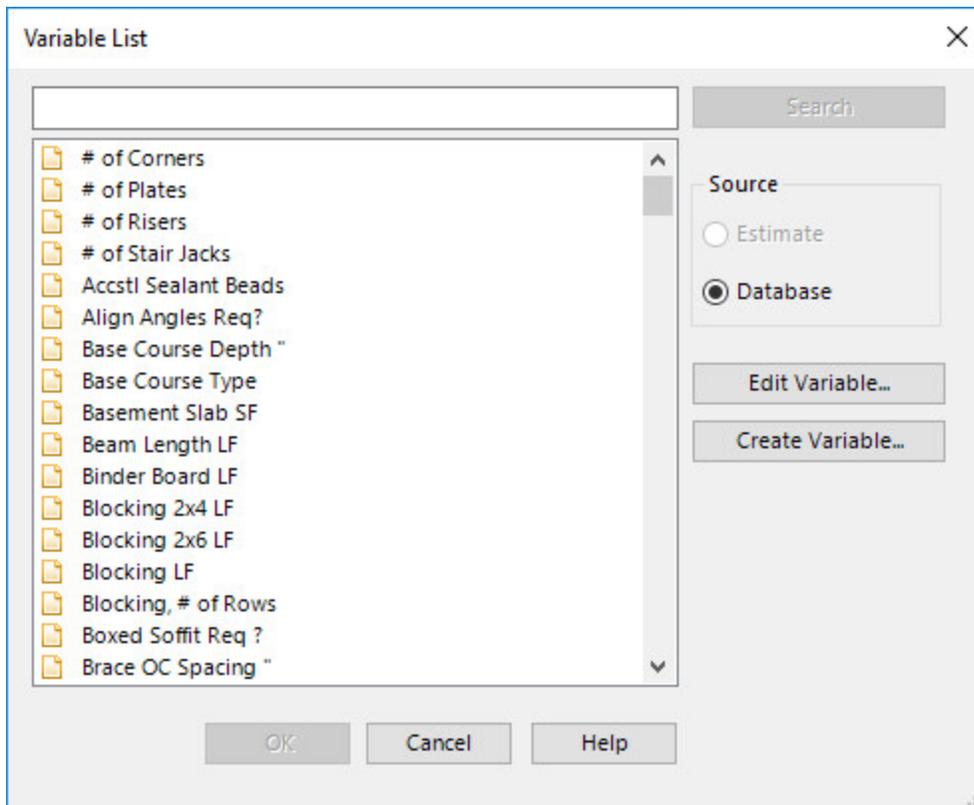
## Ability to create or edit a variable from the Variable List

At Sage, we're always looking for ways to make your workflow more efficient. In version 18.11, you can create or edit a variable "on the fly" when you are working in windows or tables that require variables that do not yet exist or require modification. You no longer have to close the window you

were working in, create or edit the variable you need, reopen the window to select the variable, and then continue what you were doing.

Now, you can use new buttons (or shortcut menu items) in the **Variable List** window to open the Database Variable window and the Adding Database Formula window, where you can edit or add a variable, respectively, with no disruption to your workflow.

For example, when working in the Formula Tables window, right-click a **Return Value** cell, and then click **Use Variable** from the shortcut menu.



When the Variable List window opens, you can:

- Edit an existing variable by selecting it on the list, clicking [**Edit Variable**], and then using the **Database Variable** window to change its properties. You can also right-click the variable, and then select **Edit Variable** from the shortcut menu.
- Add a new variable by clicking [**Create Variable**], and then entering the properties for the new variable in the **Adding Database Variable** window. You can also right-click anywhere in the list, and then select **Create Variable** from the shortcut menu.

After adding or editing the variable, close the window to return to the Variable List, and continue working.

## Ability to add or edit formulas from the Formula List

You can now add a formula more easily to a formula table by adding it from the Formula List window. Two new buttons provide direct access to formula tables:

- Click [**Create formula**] to create a new formula.
- Click [**Edit Item Table**] to edit a selected existing formula.

You can also right-click the list of formulas, and then select the **Create Formula** or **Edit Formula** option from a shortcut menu.

## Ability to copy standard databases and address books

You can now back up and restore a standard database or address book to a different name, provided you follow these steps:

1. Use the Estimating Management Console Backup tool to back up the database.
2. Using Windows Explorer, browse to the file location, and rename the backup file (with the BAK extension).
3. Use the Estimating Management Console Restore tool to restore the renamed backup file.

**Important!** It is vital to rename the BAK file and to restore it using the Estimating Management Console. If you attempt to restore the database using SQL Server Management Studio, Estimating treats the renamed database as a duplicate, and does not display it in the database catalog.

The new database is then listed correctly in all Estimating applications.

## Ability to copy overline or item values to other items

On the spreadsheet, you can easily copy the description, quantity, unit, or notes from an overline or an item to selected items below the overline.

On the spreadsheet:

1. Select the **Description**, **Quantity**, **Unit**, or **Notes** cell you want to copy from, and then drag to select the items in the same column that you want to copy to.
2. Right-click your selection, and then click **Fill Down**.

**Note:** If the estimate uses the **Automatically calculate overline quantities** option, and:

- The target cell is in an item row, only the absolute quantity is copied to that cell, regardless of whether the source cell is aggregated or a lump sum.
- The target cell is in an overline row, if the source cell is aggregated, the target cell will be aggregated, even if the target cell was initially aggregated.

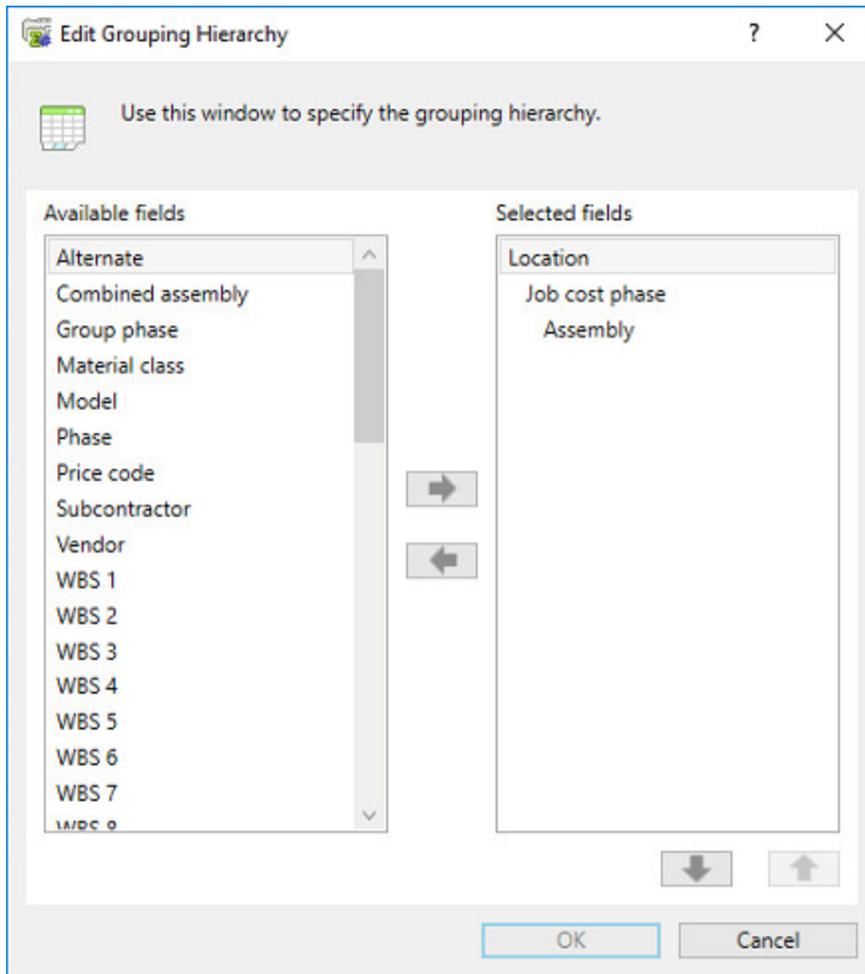
If the initial cell contains a lump sum amount, all the cells you are copying to, including overlines, are updated with the fixed amount.

## Improved Report Manager

### Custom Report Sequences

In the Estimating Management Console, you can now generate reportable views based on a specified spreadsheet sequence. You are no longer restricted to generating report views for the active sequence.

In the Report Manager, before you generate report data, you can use the new **Sequence** option to specify whether to use the selected estimate's current sequence or a different sequence that you specify. When you select **Custom** for the option, and then click the browse button  beside the option, a new **Edit Grouping Hierarchy** window appears, enabling you to specify how to organize the information on the report:



From the left-hand pane, you select fields that represent the information you want to appear on the report, clicking the right arrow key to add each one as a report element on the right-hand pane. You can reorder the selected elements by selecting a field, and then using the up and down arrows to place them in the desired sequence in the right pane. When you have finished customizing the report hierarchy, click **[OK]**.

## More enhancements to the ribbon menus

We are continuing the initiative begun in version 17 to reorganize the ribbon, making it more logical and consistent.

It also includes a brand new group of Adjustment icons on the **Data** tab (**CCI** and **Addons**) and new layout-related icons on the **Home** tab (**Save**, **Save As**, and **Edit**).

To compare the locations of functions on the new ribbon with the ribbon in version 16, see the help topic, [Comparing the new ribbon with the ribbon in version 16.11](#).

## The Common Language Runtime in SQL Server is turned off for new installations

Beginning with version 18.11, Sage Estimating no longer uses the Common Language Runtime (CLR) integration feature in the Microsoft SQL Server instance, resulting in improved security and performance, and a more future-proof application. For this reason, the CLR integration feature is not automatically turned on for new installations of Sage Estimating.

When you upgrade from earlier versions of Sage Estimating, however, the upgrade process does not turn off the CLR integration feature. This means that the CLR integration remains turned on for your SQL Server instance. If you do not use the CLR integration feature in SQL Server and you have database security concerns, you should consider turning off this feature.

For instructions on turning on or turning off CLR integration for Microsoft SQL Server, see *Enabling CLR Integration* in the Microsoft developer's library at [https://technet.microsoft.com/en-us/library/ms131048\(v=sql.105\).aspx](https://technet.microsoft.com/en-us/library/ms131048(v=sql.105).aspx).

## Other changes and improvements

Version 18.11 includes the following additional improvements:

- WBS codes can now accept a maximum of 20 characters.
- Standard databases that you restore using Microsoft SQL Server are automatically added to your Estimating system when you next run Estimating, provided you have administrator privileges and your estimates and address book are configured properly for the current version.

Previously, you had to search for the restored database in the Estimating Management Console, and add it manually to your Estimating system.

- In the Estimating Management Console, you can no longer remove a standard database from the Estimating database catalog. (While the **Remove** option is no longer available for the database catalog, you can continue to use the **Delete** option if you want to delete a standard database entirely. If you want to *move* a database out of the instance, you can back it up, and then restore it to a new instance.)
- We have added support for SQL Server 2017.
- We have improved the performance of the Scan Estimate tool, which now runs more efficiently.

# Fixes Since the Previous Version

Version 18.11 includes the following fixes:

- You can reinstall a database that you previously installed and renamed.
- Turning Alternates on or off no longer clears information from the Estimate Information page.
- The Edit Spreadsheet Layout window (formerly the Layouts window) now opens properly, without lagging.
- WBS codes are now listed properly in the Item Sort window.
- Means Integrator assigns the Labor factor to Equipment when you copy city cost indexes.
- You can successfully merge estimates, even if you choose not to combine matching items.
- When you export to Sage 300 Job Cost, the units in the resulting estimate are correct.
- When you change a calculated amount on the spreadsheet to a lump sum amount, and then undo your change, the program also reverts any background color and font specified for lump sum amounts back to the original background and color.
- You no longer receive an error message during takeoff when you substitute an item that uses a different unit of measure than the original item.
- When Alternates are turned on for an estimate, the column headers no longer flicker when you switch between sequences.
- Generating a Spreadsheet report for a range of values generates data as expected.
- When entering notes for models, you can now enter line breaks in the notes.
- In the Variable List window, you can create a variable from the Variable List.

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# Known Issues

## Compatibility with eTakeoff Bridge

eTakeoff Bridge is not compatible with version 18.11 by the Sage Estimating release date. We expect a compatible version of eTakeoff Bridge to be available by mid-August 2018.

**Caution!** If you use eTakeoff Bridge, do not install Sage Estimating version 18.11 until a compatible version of eTakeoff Bridge is available.

## Problem with migrated standard databases and estimates that used a job cost interface

If you migrated a standard database or an estimate that was integrated with job cost in Estimating (Pervasive), you need to perform a few additional steps to reintegrate the standard database or estimate in Estimating (SQL).

**Important!** Until you perform the following steps, you will receive a Job Cost Interface Failure error when you try to edit job cost settings for a standard database or an estimate that was integrated with job cost in Estimating (Pervasive). Also, you will not be able to use the standard database with new interfaced estimates in Estimating (SQL).

### Before you start

You need to be assigned to a role with Run Management Console, Edit Standard Databases, Edit Standard Database Settings permissions, and have Edit access to the estimates to use the job cost system setup.

### For each migrated standard database that used a job cost interface in Estimating (Pervasive):

1. In the **Estimating Management Console**, click **Standard DB** on the ribbon.
2. In the **Standard Database Catalog**, select the migrated standard database.

3. In the details pane to the right, click **[Edit]**
4. In the **Job Cost Information** section:
  - a. For the **Job cost system name**, select either **None** or **Text**.
  - b. Click **[Save]**.
  - c. For the **Job cost system name**, select **Sage 300 Construction**.
  - d. Click **[Setup]**, and enter the job cost settings required to reintegrate the database with Sage 300 Construction.
5. Click **[Save]**.
6. Repeat steps 2 through 5 for each migrated estimate that used the job cost interface in Estimating (Pervasive).

**Note:** To edit estimates, you must first click **Estimates** on the ribbon, and then (in step 2) you select the estimate from the Estimate Catalog.

## 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](http://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**.