



Sage Estimating (SQL) v19.11

Release Notes

July 2019

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Version 19.11 Release Notes

This document provides important information regarding new features and changes in your Sage Estimating 19.11 software. Read these release notes carefully before installing Sage Estimating 19.11.

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 99187, available at <https://support.na.sage.com/selfservice/viewdocument.do?externalId=99187>.

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 19.11 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 19.11 before you upgrade.
- Microsoft .Net 4.6.2 is required for Estimating. If it is not already installed on your computer, the Estimating installation will require a restart. If you prefer not to restart when installing Estimating, install .Net 4.6.2 from the prerequisites first, and then restart your computer before installing Estimating.

New Features and Enhancements

Sage Estimating version 19.11 includes the following significant improvements:

- [Database Editor improvements](#)
- [New "shell" databases to speed up new database creation](#)
- [Ability to copy standard databases in the Estimating Management Console](#)
- [Other improvements in the Estimating Management Console](#)
- [Ability to update address book by migrating changes from Sage 300 Construction and Real Estate Accounting](#)
- [Improved Estimate Catalog](#)
- [Default sequence management](#)
- [New ways to sort columns](#)
- [Other spreadsheet improvements](#)
- [Improved upgrade experience.](#)

The following sections describe these changes in more detail.

Database Editor improvements

We have introduced several enhancements to the Database Editor, which are described in the next few sections.

For more detailed information about each new feature, see the help for the Database Editor.

Work with columns more easily

With version 19.11, it's easier than ever to select, hide, and move a single column and multiple columns.

- **To select a single column**, click the column header. clicking the header of a column that is already selected clears the selection.
- **To select additional columns one at a time**, press and hold **Ctrl** while you click the headers of the additional columns. You can clear your selections, one at a time, in the same way.

- **To select a contiguous range of columns**, either:
 - Press and hold **Shift** while you click the furthest right (or left) column in the range and the first (or last) column in the range.
 - Click a column header, then hold the mouse button down as you drag the mouse to the right or left to select multiple columns. When you have selected the desired columns, release the mouse button.

Tip: If you drag the mouse to left or right margins, the display scrolls so that you can extend your selection beyond the initial display.

- **To hide columns**, select one or more columns, right-click one of the selected column headers, and then click **Hide Column** from the shortcut menu.

Note: Hidden columns are now marked by a visual indicator.

- You can more easily drag and drop selected columns to a different position. For example, you can drag one or more columns from the beginning to the end of a layout in one smooth process. (Previously, you had to drag a column as far right as you could, drop it, manually scroll the window to the right while keeping the column visible, repeating the drag-and-drop process until you could drop the column in the desired location—and you could only drag and drop one column at a time.)

To move columns, select one or more columns, click one of the selected column headers, and then drag the mouse right or left. . If you drag the mouse to left or right margins, the display scrolls so that you can extend the display beyond the initial set of columns. Drop the columns at the column divider where you want to relocate the selected columns. The relocated columns remain selected after you drop them.

Copy and paste columns and rows between Excel and the Database Editor more efficiently

Now, you select and copy only visible columns from the active layout. When you paste the copied data into Excel, data from hidden columns is not included.

When you copy and paste an entire row from the Database Editor into Excel, the column headers from the current layout are automatically copied into Excel. By making the record structure obvious, you can more easily create and edit databases in Excel. For example, you can copy a single row from the Database Editor to Excel to obtain a record template, add and edit rows (records) in Excel, and then copy and paste the Excel data back into the Database Editor.

Note: Columns are pasted in the same order as you copied them.

When copying and pasting rows from Excel into the Database Editor:

- If the row has category columns, but the column is not available in the current layout, Estimating makes the column available so that the affected column can be pasted.
- If the row has a rounding precision column, but the rounding direction column is not in the current layout, Estimating sets the rounding direction to Closest.
- If the row has a Material Class description, but the Material Class column is not in the current layout, the Material Class description remains read-only, and Estimating does not paste it.

Note: Price change dates for categories are calculated, not pasted.

Drag phases and items and drop them in new locations

In the Phase and Item grids, you can drag item or phase rows to a different location, either moving them to or copying them at the new location.

You can drop items after an existing item in the phase tree or on the items grid.

You can drop phases after an existing phase on the phases grid.

To move or copy item or phase rows to another location:

1. On the **Database Editor** grid, select the row that you want to move or duplicate, and then release the mouse.
2. To move the item or phase, click the row and then, while holding down the left mouse button, drag the row to a different phase in the navigation pane (on the left) or to a different position on the grid.

To create a copy (Duplicate) of the row at a new location, hold down the **Ctrl** keys while you drag the row to the new position.

3. Drop the row in the new location.

When you drop items, a **Renumber Items** or a **Duplicate Items** window appears, depending on whether you are moving or copying rows. For numeric item codes, the windows display default values for the **Target phase**, **Start item**, and **Increment value** fields, but you can change them.

When you drop a phase on the grid, the **Renumber Phases** window appears. You can specify a starting phase number or leave the numbers unchanged. You can also change the job cost phase, as needed. However, you cannot save the database if the phase contains duplicate items.

Note: New phase and item numbers are highlighted with a green background so that you can easily identify the changes before saving them.

For more information about the Renumber Items, Renumber Phases, and Duplicate Items windows, see the Database Editor help.

4. On the ribbon, click **Save**.

The background of the changed rows is restored to neutral when you save the database.

Other usability improvements in Database Editor

- In the Manage Layouts window, you can use a new [**Rename**] button to rename a selected layout.
- In the Manage Filters window, you can use a new [**Rename**] button to rename a selected filter, and a new [**Copy**] button to copy an existing filter.
- You can use new **Save** and **Save As** buttons on the ribbon to save the current layout.
- When you select a database phase in the navigation pane, the items grid is automatically updated to show the items in the selected phase, with the first item in the phase at the top of the displayed area.

Work with items and phases more efficiently

You can now drag and drop (or copy and paste) items from one phase to another, and you can copy and paste phases.

Similar to Estimating (Pervasive), default filters are now available to limit the display of items. The installation process writes new default filters to each user's Sage roaming profile folder if they do not yet exist in the user's profile. You can use the filters "as is," or you can use them as the basis for customized filters.

You can paste data into an empty database. For example, if you are creating a new database from data you set up in an Excel spreadsheet, you can simply copy and paste the items into a new row.

When you select an invalid row, the background color changes so that you can tell that it has been selected. Previously, selected invalid rows had no indication that they had been selected.

Changes to column sorting

You must now hold down the **Alt** key while sorting on a column. (If you do not hold down the **Alt** key, you simply select columns.)

In summary:

- **To sort on a single column in ascending order**, hold down the **Alt** key while you click the header of an unsorted column.
- **To sort in descending order**, hold down the **Alt** key while you click the header again.
- **To undo sorting on a column**, hold down the **Alt** key while you click the header one more time.
- **To sort on multiple columns**, first, sort the first column in the range of columns. Then, hold down the **Alt** and **Shift** keys while you click the header of the next column in the sort range. Add more columns

to the range in the same manner.

You reverse the sort order by holding down the **Alt** and **Shift** keys while you click the header a second time.

To remove a column from the sort group, hold down the **Alt** and **Shift** keys while you click the header a third time.

New shell databases to speed up new database creation

If you are new to Sage Estimating and you have been maintaining item lists and estimates in Excel or another spreadsheet program, the prospect of creating a database from scratch for Sage Estimating might be daunting. We want to help make that process easier for you, so you can become productive quickly.

Version 19.11 comes with the following "shell" databases that include standard CSI phase codes, but no items:

- **Shell Commercial General contracting.** This database includes only phases commonly used by commercial general contractors.
- **Shell CSI 1995.** This database uses the 16 divisions from the old MasterFormat 1995 Specification.
- **Shell CSI 2011.** This database uses the 50 divisions from the MasterFormat 2011 Specification.

If you need to create a database to house your own item list, you can install one of these databases using the Estimating Management Console. Then, using the Database Editor, you can easily populate the database by adding your own items to the standard phases or by transferring existing items from Excel.

For more information, see [Creating a new database from Excel data](#) in the Database Editor help.

Ability to copy standard databases in the Estimating Management Console

You can use the new Copy tool in the Estimating Management Console to create a new standard or cost database by copying an existing one.

The program creates a temporary backup file, and then "restores" it under a new database name that you specify.

For more information about copying databases, see the [Copying Databases](#) help topic.

Other improvements in the Estimating Management Console

Version 19.11 includes the following additional improvements:

- We have removed the **Make Available** capability from the Estimating Management Console and the Manage Estimates window.

To prevent data corruption, Sage Estimating no longer enables you to unlock another user's estimate.

- In the Estimating Management Console, new [**Select All**] and [**Clear All**] buttons in the **Backup**, **Restore**, and **Optimize** panes enable you to select or to clear the all the names in the list.
- In the Estimating Management Console, when you select a database in the Catalog pane, a new **Created By** field displays the ID of the user who installs a standard database or address book, or adds an estimate using the Estimating Management Console
- In the Estimating Management Console, we have added a new **Delete login(s) from SQL Server instance** option to the **Delete User(s)** dialog box. If you select this option, the program removes the user's login from the instance as well as from the Estimating program.

Update address book by migrating changes from Sage 300 Construction and Real Estate

Version 19.11 enables any user that has new limited management rights to remigrate the Address Book from Sage 300 Construction and Real Estate Account. Previously, only Sage Estimating administrators could migrate any data.

Also, importantly, when you remigrate the Address Book, the migration program updates existing entries in the Estimating address book with any changes processed in Sage 300 Construction and Real Estate since you last migrated the Address Book, if the changes are more recent than any made in the Estimating Address Book.

Assigning limited Migrate Data permission to non-administrators

To enable non-administrators to migrate Address Book data, version 19.11 introduces a new permission level that you can assign to non-administrator roles: **Migrate data (limited)**. You assign this permission in the Estimating Management Console.

Note: Users who also have **Create estimate** permission can migrate estimates.

Updating address book contacts

With **Migrate data (limited)** permission, any user with access to the Estimating Management Console can update a previously migrated Address Book with any changes that were subsequently process in Sage 300 Construction and Real Estate.

Improved Estimate Catalog

The Estimate Catalog presents all your estimates in a tree-like view when you open or manage estimates. In version 19.11, we have introduced improvements to make it even easier to work in the Estimate Catalog. The Estimate Catalog is now more responsive, enabling you to navigate more easily and accomplish more tasks with fewer clicks. When you make changes to the catalog (for example, renaming, copying, moving, or deleting estimates), the catalog is refreshed much faster.

When you click a branch in the Estimate Catalog (for example, All Estimates), all the estimates associated with that branch appear immediately in a grid in the right-hand pane. The grid displays key information about each estimate as you navigate the estimate catalog. You can even filter the display to show only estimates for a specified estimator, for example, so you can find the estimate you want more quickly. You can also export the contents of this grid to an Excel file by clicking the Export button above the grid in the right-hand pane.

You can select multiple estimates in the Estimate Catalog, and then perform processes on those estimates simultaneously. For example, you can select several estimates, and then move (drag and drop), delete, or export all the estimates at once. If you export selected multiple estimates from the Estimate Catalog pane, the estimates are preselected in the Export window.

You can drag multiple selected estimates to the branch node or anywhere on the branch. Dropping the estimates locates them on that branch. As you drag the estimates to a different location on the tree, hint text on your screen indicates the current location until you drop them in their new location. If you press and hold down the **Ctrl** key while you drag the estimates to a different branch, the program creates copies of the original estimates and places the copies in a new location.

The Copy Estimate window is now called Duplicate Estimate, and the corresponding function on the shortcut menu (when you right-click an estimate in the Estimate Catalog) is also called Duplicate. The advantage of the Duplicate Estimate window over using the drag-and-drop method or the Copy function is that you can adjust some settings for the new estimate as you create the duplicate.

We have also improved the toolbar in the navigation pane:



- There is a new Delete icon. Select estimates in the **Estimate Catalog** pane, and then click the Delete icon to remove the estimates.
- We have replaced the old Copy and Paste icons with modern-looking Copy and Paste icons. (We have also renamed the corresponding options in the shortcut menu to match the new toolbar.)

Default sequence management

Spreadsheet sequences group items in a logical, hierarchical order, arranging information in ways that highlight different aspects of your estimates. You can easily switch between sequences to obtain a different view of an estimate—for example, to a sequence that enables you to perform a task efficiently.

Previously, you could save sequences associated with the current database as default sequences. However, there was no easy way to add or remove default sequences without replacing the entire list.

In version 19.11, you can create and manage a list of standard spreadsheet sequences for each standard database. Because Estimating maintains these sequences separately for each database, you can create customized default sequences for each database. Then, when you create an estimate using a particular standard database, the list of spreadsheet sequences from that database is copied to the new estimate by default.

Note: Existing estimates are not affected by these changes to database spreadsheet sequences, but you can manually add them to existing estimates as needed.

If you want to use the same default sequences across multiple databases, after setting up default sequences in one database, you can export them, and then import them into additional databases.

You use the new **Select/Edit Default Spreadsheet Sequences** window to view, edit, or remove default spreadsheet sequences associated with a database, and add new ones. You also use this window to select the default spreadsheet sequences you want to copy to the current estimate.

Note: To support these changes, we redesigned the existing Edit Estimate Spreadsheet Sequences window, as follows:

- We removed the **Save as Default** option, which is no longer needed.
- We added a new **[Database]** button. You click this button to open the **Select Default Spreadsheet Sequences** window.

For more information, see [Select/Edit Default Spreadsheet Sequences window](#) in the Estimating help.

New ways to sort items in spreadsheet columns

In Estimating, you use spreadsheet sequences to group spreadsheet items in a logical, hierarchical order. By organizing an estimate this way, you can easily view the information that is most important to you.

Now, you can sort items within each overline in the current spreadsheet sequence in ascending or descending order, enabling you to display information in even more meaningful ways.

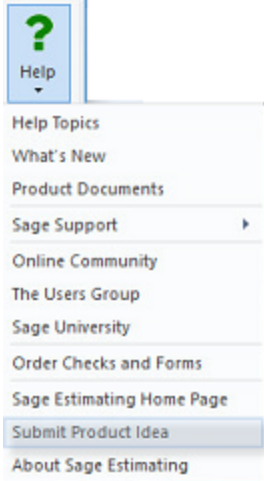
Example: You are viewing an estimate using a spreadsheet sequence grouped by phase. You want to see items with the largest labor amounts first within each phase group, so you decide to sort the contents of the Labor Amount in descending order. You simply right-click the **Labor Amount** column header, and then select **Sort Descending** from the shortcut menu (or press the **Alt** key while you click the column header).

You can also sort on additional multiple columns by selecting the **Add to Sort Ascending/Descending** option from the shortcut menu (or press **Shift + Alt** while you click the column header). An up or down arrow in the column header indicates the direction of the sort on that column, while a number in the header indicates the order in which each you applied each sort to the spreadsheet.

To remove the sort on all the columns in the current sequence, click the **Clear Sort** option on the shortcut menu.

For steps on sorting columns, see [Sorting columns in ascending or descending order](#) in the Estimating help.

Note: This sorting feature provides a quick way to reorder the items in the current spreadsheet sequence. For this version, sorts you perform on one spreadsheet sequence do not carry over to other sequences and are not saved to the layout. For future versions, we hope to provide sorting and reuse capabilities that are of most use to you. Use the Estimating Help menu to tell us your ideas for the future development of this feature:



Other spreadsheet improvements

- You can enter multiple, named notes for an estimate in the Estimate Notes window. You enter the notes on individual tabs that you add and name. You can also rename tabs or delete them.

For more information, see [Estimate Notes window](#) in the Estimating help.

- The current column and row headings are now highlighted automatically when you select a cell on the Estimating spreadsheet.

You can also highlight the entire current row (or turn the row-highlighting feature off) using a new spreadsheet option. Select **File > Options > Sage Estimating Application > Spreadsheet > Highlight current row in spreadsheet**.

- Where the full text of some fields is not visible (such as WBS values, Addons, Unit Descriptions) because it is too long to fit in the cell, you can hover over the cell to view the complete text.
- A new shortcut option enables you to restore the calculated value of a lump sum cell. You right-click the cell that contains a lump sum, and then click **Restore calculated value** or **Remove lump sum** to recalculate the cell, or clear the lump sum format.
- We have added new keyboard shortcuts to the spreadsheet and docking panes. For more information, see the help topic, [Keyboard Shortcuts](#).
- You can use a new **Arrange All** window to display spreadsheet windows horizontally or vertically. You open the window by clicking new **Arrange All** icon in the View section on the ribbon, or by pressing **[Ctrl]+[Shift]+[W]**.

Note: To use this feature you must clear the **Display estimates in tabs** option.

- We have added a new **Created By** field to the status bar on the spreadsheet and to the estimate grid in the Estimating Management Console, so you can see who created a standard database or a selected estimate.
- You can enter multiple, named notes for an estimate in an improved, tabbed **Estimate Notes** window. You can open the Estimate Notes window using a new **Notes** icon in the **Estimate Views** group on the ribbon, or from the **Estimate Information** window (as in earlier versions).

You enter notes for an estimate on individual tabs that you can add, rename, and remove. (You cannot rename the default General tab, however.) For more information, see the help for the estimate Notes window.

- When you combine spreadsheet items that use alternates, all the alternates for the combined item must have the same inclusion status (either all included or all excluded). Combined items can have different alternates, provided that their inclusion statuses are the same.

- You can now add subcategory values "on the fly" on the spreadsheet, if the values do not already exist in the standard database.

Improved upgrade experience

During the upgrade process, the program now shrinks the existing log file, which can become very large, and it removes invalid estimates. However, it does so only if the database recovery model is set to Simple. We do not recommend that you change the recovery model unless your business requires features available only in a different model.

Fixes Since the Previous Version

Version 19.11 includes the following fixes:

- In the Database Editor:
 - When you clear an item category selection on the item grid, any job cost phase that was entered for the item remains intact, although it doesn't appear in the grid.
 - When you save a layout, locked columns are now saved as part of the layout.
 - You can again import Excel (XLS) files to update prices.
 - You can reopen a checked-in database from the Recently used list.
 - Clicking the **Help** button (or pressing **F1**) now displays the correct help topic.
- In the Estimating Management Console:
 - When integrating with Sage 300 Construction and Real Estate Job Cost, if a job number field has an error, you can select a valid number or enter a blank to clear the error.
 - You can migrate an Options file even if it includes layouts for reports that do not exist in Estimating (SQL).
 - You can optimize a database even if page-level locking is turned off for the database.
- When exporting to Sage 300 Construction and Real Estate Job Cost, you can now:
 - Map estimate information to WBS values with the **Use all WBS values** option.
 - Export job costs for an item that has non-zero units but a zero price and amount.
- In the spreadsheet:
 - When choosing a new WBS value, the list of WBS values scrolls down to the current value (if there is one).
 - When you sort items by subcontractor for an estimate, then open the bid grid and select another subcontractor for an item, the item is correctly assigned to the new subcontractor.
 - We have fixed some display issues that could occur in the spreadsheet with high resolution monitors. For example, now tips are legible when you hover over assembly variables.

- Estimating now saves the zoom level that you last used for the spreadsheet layout so that you don't have to reset the zoom next time you apply the layout.
- When you reprice labor and equipment for a crew, updating the estimate rate tables and updating crews from the database:
 - The report completion message appears only once.
 - The Estimating application no longer closes.
- When you search for items during takeoff, results include all items that contain any of the words used in your search, regardless of their order. For example, if you search for "wood frame," the results would include "wood door frame," even though "door" is interposed between "wood" and "frame."
- During Assembly Takeoff:
 - You can undo more than one pass with select-at-takeoff lines.
 - When you take off an assembly, and then change a variable in a pass, the replaced pass contains the correct quantities.
- Estimating does not stop working when you select a model in the **Check Model** window.
- For Sage Estimating reports:
 - The company name now comes from the estimate information, rather than your customer registration name.
 - Reports that you export to a CSV file now include only the columns that are visible on the layout.
 - Report cover pages for the Standard and Spreadsheet reports are justified properly when you use job classifications for the estimate.
 - We have adjusted the margins of the Spreadsheet report to align with the report header.
 - When you use the **Prefill from Spreadsheet** function in the Report Options window, Estimating:
 - Now updates the **Show level total separator lines** option correctly.
 - No longer selects the **New Page for each** setting inappropriately.
 - No longer automatically sets the **New page for totals** option for sort sequences that have more than two sort levels.
 - The Spreadsheet Report now prints an assembly's items in the same order used for the

assembly.

- Aggregated quantities are now calculated properly when you generate a custom report.
- When you transfer Means items to a standard database that uses a 0-digit phase suffix, items are correctly left justified so that they are not omitted when you apply city cost index factors.

Known Issues

Negative values are not sorted in order

When you sort the spreadsheet on individual numeric amount columns, negative values do not appear in the correct order.

SAP Crystal Reports compatibility with other Sage programs

Version 19.11 uses the SAP Crystal Reports Runtime version 13.0.22, which is not compatible with Crystal Reports used in these versions of other Sage programs:

- **Sage 300 Construction and Real Estate v17.1 and v18.1.**

To ensure that you can run and print your Sage 300 accounting reports, you must use Sage 300 Construction and Real Estate v18.2 or later with Sage Estimating v19.11.

- **Sage Fixed Assets 2018.0.**

If you use Sage Fixed Assets on the same computer as Sage Estimating, you must use Sage Fixed Assets 2018.1, or later, with Sage Estimating v19.11.

For more information, see [Knowledgebase article KB 93436](#).

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.

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**.