



2017 Means Integrator

Release Guide

For Sage Estimating 15.1 and 16.1

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2017 Means release

This release contains Means Integrator cost data files that you can use to create, extend, or update item costs in your Estimating Standard databases with current costs for corresponding items in the RSMMeans Cost Data Books.

If you use RSMMeans cost data in your estimates, read this guide for instructions on updating the following Estimating Standard databases:

- **Construction Knowledgebase**—a Sage Estimating Standard database that contains Means items and other data. You use the CK Price Update Means cost data files to update prices in this database.
- **Residential Knowledgebase**—a Sage Estimating Standard database that contains Means items and other data. You use the Residential Cost Data Prices (DB1-20) Means cost data file to update prices in this database.
- Any Estimating Standard databases that were created or extended using Means Integrator cost data files.

MasterFormat 2014 Format

RSMMeans has adopted the Construction Specifications Institute (CSI) MasterFormat 2014 (MF2014) data structure for all of their databases.

Important!

- This release is compatible with Sage Estimating Standard databases created by Means Integrator using MF2004, MF2010, MF2012, and MF2014 phase/item formatting.
- You must upgrade to Sage Estimating products version 14.1 or later before you install the 2017 Means Integrator.

New in this release

Means Integrator cost data files have been updated with current pricing information.

Overview

The Means Integrator cost data files correspond to the RSMMeans Cost Data books you receive with your shipment.

With Sage Estimating Means Integrator, you can create Estimating Standard databases using one or more Means Integrator cost data files. You can also update Estimating Standard databases that were created or extended using the Means Integrator.

This section describes how to install the latest cost data files.

Note: Before you can install new cost data files, you must install Sage Estimating 14.1 or later, including the Means Integrator.

1. Download the 2017 Means Integrator cost data installation files to the workstation or server where Sage Estimating is installed. where you want to store your Means Integrator cost data files.
2. Using Windows Explorer, navigate to the folder to which you downloaded the cost data installation files, and then double-click **Setup.exe**.
3. In the Means Integrator and Databases Setup wizard that appears:
 - a. Click [**Next**], and then click [**Accept**] to accept the license agreement.

The Enter Activation Information screen appears.

If you installed the Means Integrator previously, the activation code for the Means Integrator appears in the grid.

- b. In the grid, enter the activation code you received from Sage for the means cost data you want to activate, and then click [**Next**].
 - c. Click [**Finish**].

Follow the steps in the next section, "2017 Means Integrator workflows" (page 2), to integrate your RSMMeans data.

2017 Means Integrator workflows

You use the Means Integrator wizard to integrate your RSMMeans data using a five-step process.

To start the 2017 Means Integrator, select **Start > All Programs > Sage > Sage 300 Construction and Real Estate > Estimating > Means Integrator**.

Tip: This section provides an overview of the five-step workflow. For more detailed information about the options you can choose at each stage, click [**Help**] in the wizard.

Step One: Prepare database

In the Means Integrator wizard, click [**Next**] to advance to the **Prepare Database** window.

Use this window to specify whether to transfer data or update data.

Transfer Data

Select **Transfer Data** if you are ready to transfer 2017 RSMMeans data to a new or existing Sage Estimating Standard database.

- **Transfer Data—New Database**

Select this option to create a new Estimating Standard database and populate it with all of the 2017 RSMMeans items in the MF2014 format.

- **Transfer Data—Existing Means MF2014 Database**

If you select to transfer to an existing Estimating Standard database that you created or extended previously using the Means Integrator, the Integrator will transfer any new 2017 RSMMeans items to that database.

- **Transfer Data—Non-Means Database**

If you select to integrate with an Estimating Standard database that was not created using the Means Integrator, the Integrator transfers the 2017 RSMMeans items to your existing database. The resulting database will contain both your existing phases and items and the RSMMeans phases and items.

Note: Adding 2017 RSMMeans phases and items could cause your phase sort to appear differently in Estimating.

If you are transferring RSMMeans data to a Estimating Standard database, also select a company to associate with the data then specify the length of the normal work periods, the Job Cost program you want to associate with the database (if desired), and the default crew pricing method.

Sage Estimating displays the specified information in the **Database Settings** window whenever you open the database.

Update Data

Select **Update Data** if you have current databases that need to be updated with 2017 prices.

- **Update Data—Existing Means Database**

If you select to update an existing Estimating Standard database which was created or extended previously using the Means Integrator, the Means Integrator updates the items you specify with 2017 information.

- **Update Data—Non Means Database**

If you select to update an Estimating Standard database that does not have Means price update codes on its items, the items will not be changed.

Note: 2017 RSMMeans pricing books are available only in the MF2014 format.

Step Two: Select data

Select the RSMMeans divisions and items that you want to update in or transfer to your selected Sage Estimating Standard database.

You can select items and divisions individually or select all available items and divisions at one time.

Step Three: Select pricing

Select whether to use RSMMeans national average pricing for item pricing or base item pricing on a regional cost index.

- If you choose to use the **RSMMeans Standard National Average Pricing** option, the Means Integrator uses the RSMMeans standard national average as the base price for each item during the integration. The Means Integrator then imports any city cost indexes associated with the RSMMeans items so you can use them later with the Sage Estimating **Cost Index** feature.
- If you select the **RSMMeans City Cost Index** option, the Means Integrator calculates and sets item pricing based on the region you specify in the **State** and **City** boxes. It does not import any city cost index information for use in Sage Estimating.

Step Four: Select options

Select a variety of options to apply to the Estimating Standard database, including pricing options (**Crew**, **Hourly**, or **Unit**), audit report options, and what to do with any duplicate items.

Step Five: Finish

Review the summary information, and then click [**Finish**] to transfer or update the selected Estimating Standard database with RSMMeans information.

You can make changes as necessary by clicking [**Back**] and editing the desired information.

Help and information

The 2017 Means Integrator contains updated online help to assist you in converting and updating your databases. To access the online help, select **Help Topics** from the **Help** menu or click [**Help**] in most windows.

Technical assistance

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

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