



# Sage Estimating Essential v22.1

## Release Notes

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# Version 22.1 Release Notes

This document provides important information about your Sage Estimating Essential 22.1 software. Read these release notes carefully before installing Sage Estimating Essential 22.1.

## Welcome to Sage Estimating Essential!

Sage offers Sage Estimating Essential—a robust estimator's toolkit—at a competitive price for small- to medium-sized businesses. Sage Estimating Essential blends ease of use with spreadsheet and standard database tools that enable you to estimate jobs more productively and profitably.

For even more versatility, it also integrates with the following, separately licensed, construction and accounting software:

- Sage 100 Contractor
- Sage 300 Construction and Real Estate
- Sage Intacct Construction
- eTakeoff

## Read the Supporting Documentation Before You Begin

Read the following supporting documentation carefully before you install, configure, and use Sage Estimating Essential:

- The *Getting Started Guide* provides an operational overview of the Sage Estimating Essential software.
- The *Installation and Administration Guide* includes a system overview, installation and configuration instructions, and information about managing your Sage Estimating license.
- The *Quick Start Checklist* provides a list of tasks you need to perform to get Estimating Essential "up and running." You can use it to check off tasks as you complete them.
- The *Sage 100 Contractor Integration Guide* describes how to integrate Sage Estimating Essential with Sage 100 Contractor, making certain data in that program available in Sage Estimating Essential, and it explains how to use the interface wizards to send proposals, budgets, and change orders you create in Sage Estimating Essential to Sage 100 Contractor.
- The *Sage 300 Job Cost Integration Guide* provides installation, setup, and operating instructions for Sage 300 Job Cost integration.

- The *Sage Intacct Construction Integration Guide* describes how to integrate Sage Estimating Essential with Sage Intacct Construction, and it explains how to export estimate data to projects in Sage Intacct Construction.
- The *Means Integration Guide* provides installation, setup, and operating instructions for Means Integrator.

#### Notes:

- 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 116801, available at <https://support.na.sage.com/selfservice/viewdocument.do?externalId=116801>.

**Note:** The system requirements are the minimum for a computer running Estimating with one SQL Server instance. Running several other business programs with multiple SQL Server instances may affect the performance of your system.

- All the documentation for Sage Estimating Essential is available at <http://cdn.na.sage.com/Docs/en/customer/estimating/DocumentationEss.htm>.

## Video tutorials demonstrate how Estimating works!

Sage has created a series of video tutorials that demonstrate how you use Sage Estimating Essential. You can view them by clicking **Help > Video Tutorials** in the Estimating application.

## 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 116801, available at <https://support.na.sage.com/selfservice/viewdocument.do?externalId=116801>.

**Note:** The system requirements are the minimum for a computer running Estimating with one SQL Server instance. Running several other business programs with multiple SQL Server instances may affect the performance of your system.

## Migration from Estimating (Pervasive) to Versions after v20.1

The migration path from Estimating (Pervasive) to this release is not direct. If you have been using a Pervasive-based version of Sage Estimating, you need to:

1. Migrate (transfer) your existing Pervasive-based data to Estimating (SQL) v20.1.

**Important!** Sage recommends that you first migrate your data to a test environment to ensure that the migration proceeds smoothly. For example, if there are errors in your Pervasive-based data, you have an opportunity to correct them in that version before migrating the data to a live environment.

2. Upgrade your database from v20.1 to this release.

For information about migrating your Pervasive-based data to Estimating (SQL), see the version 20.1 *Installation and Administration Guide*.

**Tip:** You can continue to operate v20.1 alongside this current release. If you have a large number of estimates in Estimating (Pervasive, you can migrate them to version 20.1, export them from version 20.1, and then import them later into this version, as needed.

## Installing Sage Estimating

Refer to the [Installation and Administration Guide](#) for complete instructions on installing the software and migrating or upgrading your data.

## Before Installing

### Important!

- Microsoft .NET 4.8 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, first install .NET 4.8 from the Prerequisites folder (in the Install folder), and then restart your computer before installing Estimating.

If you receive a message about .NET during installation, stop the installation, restart your computer, and then run the installation program again.

- Sage Estimating Essential version 22.1 is compatible with version 21.1 of Sage 300 Construction and Real Estate, and later. If you integrate Estimating with Sage 300 Construction and Real Estate for Job Cost or Project Management, do not install Sage Estimating Essential version 22.1 until you install Sage 300 Construction and Real Estate version 21.1, or later.
- If 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 22.1 before you upgrade to this version.

## We've been listening to you!

Sage thanks you for your product ideas!

In Sage Estimating Essential version 22.1, we have incorporated the following customer requests:

- The report printing window now includes a check box that you can select if you want to print a cell's highlight cell color.

Thank you for this suggestion, Ross K.

- You can add price change date columns to spreadsheet layouts.

Thank you for this suggestion, Stan H.

# New Features and Enhancements

Sage Estimating version 22.1 introduces the following significant features:

- A new External Report capability in the Estimating Management Console that you can use to generate estimate data that will persist in a data store where you can use it to create custom reports and dashboards, and analyze it using a variety of business intelligence tools.

See [General data for external reports](#), later in this document, for more details.

- Integration with Sage Intacct Construction.

If you use Sage Intacct Construction, you can send estimates from Sage Estimating to projects in Intacct Construction.

See [Integration with Sage Intacct Construction](#), later in this document, for more details.

- SQL Server authentication, which provides a secure means of authentication for companies that require the convenience of a networked system, but do not have a domain.

See [Support for SQL Server authentication](#), later in this document, for more details.

- Improved performance and usability of the **Add User** window in the Estimating Management Console.
- The **Add User** window includes support for SQL Server authentication.

See [Improved usability, security, and performance in the Add User window](#) for more details.

- New **Price Changed** columns you can add to your spreadsheet layouts that show the dates prices last changed for labor, materials, equipment, subcontracts, and other costs. They can help you to identify prices you need to update before finalizing an estimate when prices are rising rapidly.
- A full text search panel that Estimating displays by default for several Estimating grids and dialog boxes.

See [Improved search](#), later in this document, for more details.

- A variety of performance improvements.

See [Improved performance](#), later in this document, for more details.

- We reorganized the **Spreadsheet Report Options** so that dependent options are located below their "parent" option, making the relationships more obvious.
- A new [**Prefill Item Spreadsheet Sort**] button on the **Spreadsheet Report Options** tab for printing items in the same order (ascending or descending) used in the spreadsheet.

- A new report option to print highlights on spreadsheet reports.

**Note:** When you select this option, highlights used on the spreadsheet override any background colors on lump sums, zero amounts, and excluded alternates.

## Generate data for external reports

You can use the new External Report capability, available in the Estimating Management Console, to create snapshots of your data that you can use in custom reports, dashboards, and with business intelligence tools to analyze data.

The advantage of External Report, compared with Report Manager, is that when you generate data for external reports, the generated data remains available in a separate location, so you can use it for multiple reports and comparisons. With Report Manager, the data is removed when you close the report.

The way you generate data is very similar to Report Manager, except that you save data generation settings for reuse. You can generate data on demand in the Estimating Management Console or use a new **Generate Data** icon on the Reports ribbon in Sage Estimating. The data is current at the time you generate it.

**Tip:** If you need to generate data for a large number of estimates all at once, consider creating a task in Windows Task Scheduler or running the Estimating External Report Database Generator from the Windows command line. The executable file, `Sage.Estimating.ExternalReportDBGenerator.exe`, is located in `Program Files\Sage Estimating\Sage Estimating [version]`. You can also double-click this file to run it when you need to refresh your database.

**Important!** Generate data for large numbers of estimates only when no other users are working with your Estimating database.

For more information about External Report, see the help for the Estimating Management Console.

## Integration with Sage Intacct Construction

If you use Sage Intacct Construction, you can transfer estimate information directly into that program, where you can use it without having to reenter the information. After exporting an estimate, the estimate information is available immediately in the following Intacct Construction screens:

- Project Estimates
- Estimate entries (for a particular project estimate)

The flow of information between Sage Estimating and Sage Intacct Construction is governed by Job Cost Information settings you select for the estimate or the standard database and by settings you select during an export.

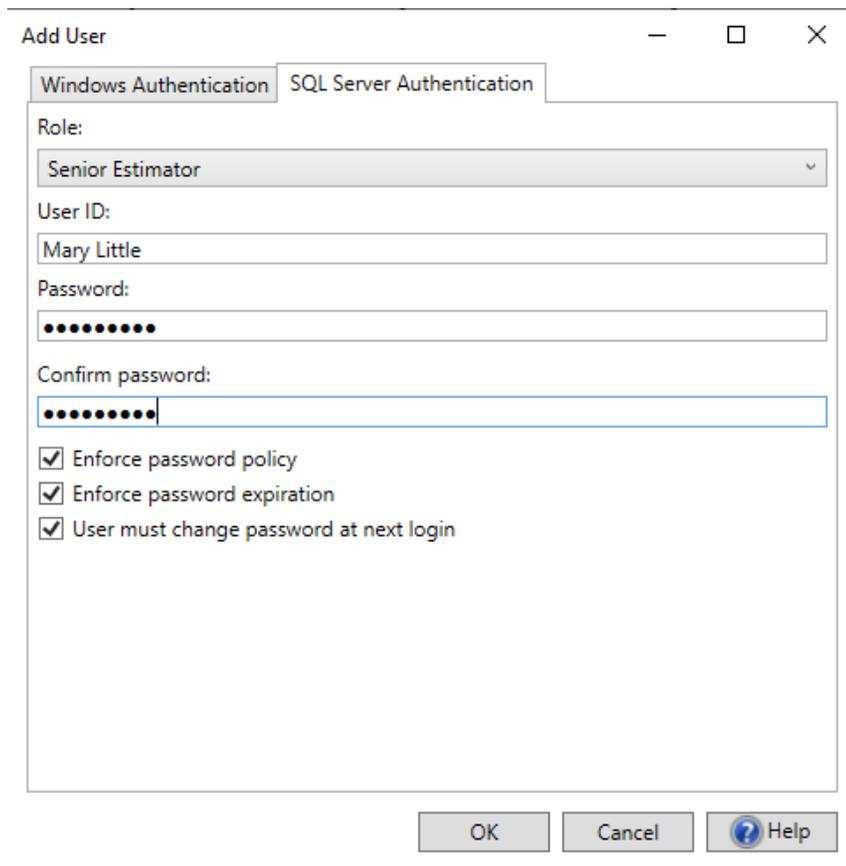
For more information about setting up the integration and exporting estimate data, see the Estimating help and the *Sage Estimating Sage Intacct Construction Integration Guide*.

## Support for SQL Server authentication

If you're using Estimating in a non-domain environment, but you want to use Estimating in a networked way, you can set up Estimating users with SQL Server authentication. This way, you need to set up each user only once for the instance, but they can log in to the instance from different machines.

**Note:** If you've set up Estimating on a domain, you don't need to use SQL authentication.

The **Add User** window also includes a new tab for SQL Server Authentication:



The screenshot shows a dialog box titled "Add User" with two tabs: "Windows Authentication" and "SQL Server Authentication". The "SQL Server Authentication" tab is active. The dialog contains the following fields and options:

- Role:** A dropdown menu with "Senior Estimator" selected.
- User ID:** A text input field containing "Mary Little".
- Password:** A text input field with 10 dots representing a masked password.
- Confirm password:** A text input field with 10 dots representing a masked password.
- Options:** Three checked checkboxes:
  - Enforce password policy
  - Enforce password expiration
  - User must change password at next login

At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

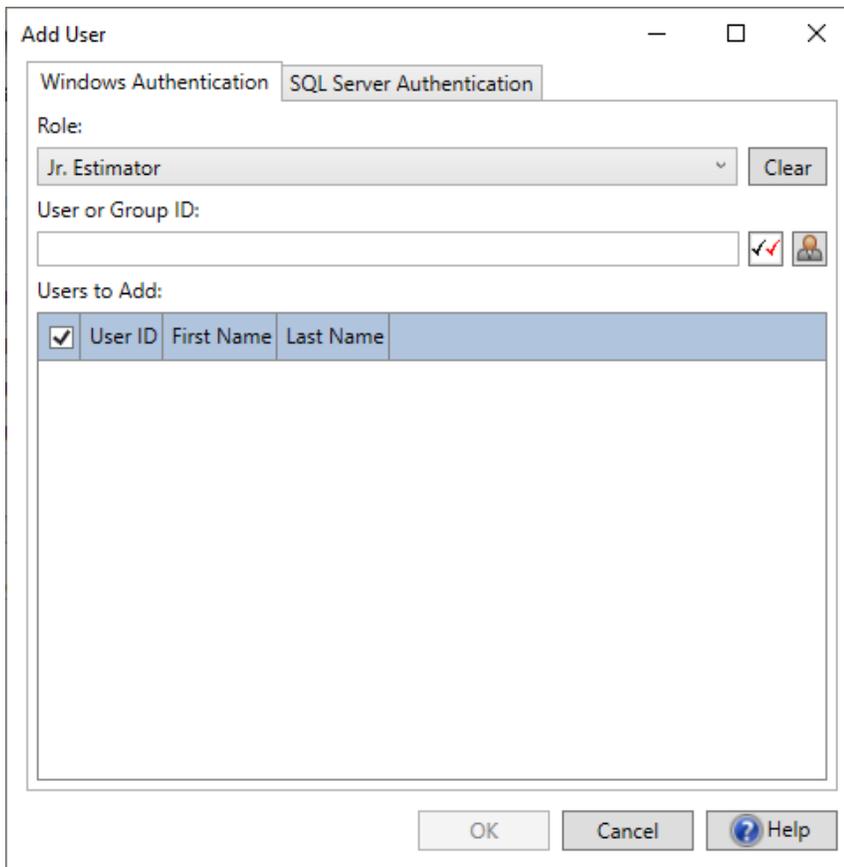
In contrast to Windows Authentication, where a user must exist in on your local machine or on your domain, for SQL Server Authentication, you create a new SQL login for users.

### To create a new SQL login:

1. From the Role list, select the role to assign to the user.
2. In the **User ID** box, type the name or ID of the user.
3. In the **Password** box, enter the user's new SQL password.
4. In the **Confirm password** box, enter the same password again.
5. Select local security options that you want to enforce for the user:
  - Select **Enforce password policy** to make sure that the user's password meets criteria specified in **Microsoft Windows Security Policy**.
  - Select **Enforce password expiration** to make sure that the user changes their password after a period of time specified in **Microsoft Windows Security Policy**.
  - If you select **User must change password at next login**, the next time the user tries to log on, they are prompted to change their password.

## Improved usability, security, and performance in the Add User window

When you open the **Add User** window, you'll notice that it has a cleaner look:



It provides separate tabs for **Windows Authentication** and (new in version 22.1) **SQL Server Authentication**.

## Improved Windows Authentication

In this version, specifying Windows Authentication appears on its own tab and has several advantages over earlier versions:

- The tab always displays a list of users in the **Users to Add** grid, whether or not you select a group.
- You can use a new **[Clear]** button to reset the **Role** box to a blank, if you need to add a user without a role.
- Instead of selecting a user or a group from a list, you can either:
  - Type the user ID or group ID in a text box and then click the **Verify users or groups** (☑️) button to verify the user or group name.

After you click the button, if the name or names exist, Estimating displays them immediately in the grid. (You can also press the **Enter** key to perform this function.)

- Click the **Select User or Group** () button to display a separate **Select User or Group** window, where you can browse to users (or groups) and locations that you want to enter in the associated fields.
- You can select local Windows user groups.
- A checkbox in the **Users to Add** header automatically indicates whether any users are selected in the grid. You can select or clear all the user selections quickly just by selecting or clearing this checkbox.

## Improved search

In earlier versions of Estimating SQL, you needed to press **Ctrl + F** to display a Search window. Now, a full text Search box appears by default above the grids in a number of windows and dialog boxes.

Using full text search, you can search values, descriptions, and notes. Estimating matches text as you type it, finding matches even for partial words.

Where the Search box does not appear by default, such as in Takeoff or on the spreadsheet, or if you closed the Search panel earlier, you can display a Search window by pressing **Ctrl + F**.

## Improved performance

We improved the performance of the following windows and functions:

- Improved performance when loading variables from a large database in the **Select Variable** dialog box.
- Takeoff passes load much faster in the **Pass Audit** window.
- **Check Models** performance is improved.
- Inserting and updating records in **Means Integrator** is faster.

# Fixes Since the Previous Version

Version 22.1 includes the following fixes:

- **Spreadsheet:**
  - You can open an estimate that includes multiple addons that reference the same parent addon.
  - You can duplicate estimates that have sorted columns.
  - When you edit spreadsheet layouts that have a large number of locked columns, you no longer receive an error message saying there are too many locked columns.
  - Base price columns are not automatically added to custom layouts when you upgrade to version 22.1.
  - We restored the ability to adjust overline takeoff quantities.
- **Reports:**
  - Item notes in plain text appear properly on custom reports.
  - When you use a range to print an **Estimate report**, the **Estimate Partial Total** field shows the total for the items included in the range. The **Estimate Total** field always shows the grand total, regardless of the range you specify.
  - When you print an **Estimate report** for an estimate that has allocated addons, the signature block shows the correct total, even if you don't print the Totals page.
  - On the spreadsheet report, horizontal grid lines don't extend past the grid when you minimize overlines.
  - In the **Spreadsheet Report Options** window, your selection for the **Shaded Headings** option is saved with the report layout.
  - Long fields that exceed the page width now wrap properly on report cover pages.
- When you create a report layout for a **Bill of Materials Quote Sheet**, on the **Report Options > Sort** tab:
  - If you select a **New Page for each** option, your selection is saved with the report layout.
  - If you select **Group Phase** as the only sort level and select **None** for the **New Page for each** option, no page break is added between group phases.

- **Estimating Management Console:**
  - The Security and Report Manager panes display user defined labels.
- **Means Integrator:**
  - City cost indexes are updated properly for the **Other** category.
  - The city cost index now includes mappings for **Division 46**.
- **Job Cost integrations:**
  - The job cost system is no longer reset to None when you import estimates.
  - You can have categories on the spreadsheet even if Sage 300 Construction and Real Estate doesn't track categories.
  - We have fixed some issues that caused errors during exports to Job Cost.
  - Phase total quantities are exported to your job cost program, even when your estimate calculates overline quantities automatically.
  - JC Phase codes are now sorted correctly during takeoff.
- **Miscellaneous:**
  - You can import prices for very large databases in Database Editor.
  - When you delete multiple contacts from the **Address Book**, they are removed properly from the tree in the catalog pane.
  - In the **Database Editor** help, we've fixed the example regarding the price code formats to use for Excel.
  - You can edit Help Notes for database variables.
  - You can add variables to an item table from variable search results. Also, the search can match more than 20 characters.

# Revisions to Version 22.1

This section describes enhancements and fixes included in revisions to the software after we released version 22.1.

**Note:** Each update is cumulative. That is, each successive update includes all the fixes and enhancements provided in previous updates as well as additional fixes and enhancements in the current update.

## Update 3 (Build 22.1.2303.231, March 2023)

### Fixes

Update 3 includes the following software fixes:

- When you export estimates that have extras to Sage 300 Construction and Real Estate, the extras no longer have blank descriptions.
- When exporting to Sage 300 Construction and Real Estate Job Cost, you no longer receive an error when you set the location for a text file.
- Notes on external reports and report designs are properly formatted as plain text.
- You can generate external report data even when there are RTF notes on an estimate.
- When you combine items on the spreadsheet, Sage Estimating checks to ensure that if the items use a rate table, the rate tables are the same.
- Hiding columns on report totals pages no longer hides the adjacent column.

## Update 2 (Build 22.1.2301.251, January 2023)

### Fixes

Update 2 includes the following software fixes:

- Bid Grid no longer stops you from modifying the quantity when the item category is a part of the Bid Grid.
- When you install or change the address book, the program updates only the address book settings and does not reset all your current Estimating Management Console settings.
- When you export estimates to Sage Intacct Construction, the effective date of project estimate entries is set to the estimate date.
- Exporting estimates to Sage Intacct Construction creates new tasks in Intacct with an In Progress status.
- In the Job Cost Information section of the Estimate Information window, you no longer receive an error when selecting a job for an estimate for the first time.

## Update 1 (Build 22.1.2211.011, November 2022)

### Fixes

Update 1 includes the following software fixes:

- When you integrate an estimate with a **Sage Intacct Construction** project, **Sage Estimating** adds tasks and cost types as needed to the project, avoiding duplication.
- In the **Export to Intacct** wizard, you can enter 200 characters for the **Project Name** and 500 characters for the estimate **Description**.
- For **External Reports**, you can now sort, group, and filter on the **Lock State**, **Generate**, and **Delete** columns.
- Estimating no longer closes unexpectedly when you view items that were created using **eTakeoff Bridge**.
- When you copy an item to a different estimate, alternate information is copied correctly.

# Known Issues

## Sage Intacct Construction users need Top Level access in Sage Intacct

When setting up Sage Intacct Construction users, make sure you set them up at the Top Level in Sage Intacct. If you set them up at the entity level, they will not be able to sign in to your company.

# Need help?

## How to Get Help

Get help by:	Recommendation*	To access:
Reviewing in-product help	View information about the current window as well as procedures for using Estimating.	Click the Help button or icon, or press [F1] to display the Help topic for that window.
Reading product documentation	View documents and reference material from the Estimating Product Documents website.	Visit <a href="http://cdn.na.sage.com/Docs/en/customer/estimating/DocumentationESS.htm">http://cdn.na.sage.com/Docs/en/customer/estimating/DocumentationESS.htm</a>
Searching the Knowledgebase	Search the Sage Knowledgebase, which provides 24/7 access to support articles as well as the latest software downloads and updates.	Visit the Knowledgebase at <a href="http://www.sageKB.com">www.sageKB.com</a>
Asking the community	Join industry peers, certified partners, and Sage pros online 24/7 in Sage City—the best place to ask questions and share product experiences, tips, and tricks.	Visit the General Estimating forum at <a href="http://www.SageCity.com">www.SageCity.com</a>
Checking the latest product alerts	Keep up with the latest product information in the Sage City <i>Announcements, News, and Alerts</i> forum.	Visit <a href="http://www.SageCity.com">www.SageCity.com</a>
Exploring training options	Learn how to harness the full power of your software through videos and classes at Sage University.	Visit <a href="http://www.SageU.com">www.SageU.com</a> You can also get access to Sage University from the Estimating File menu by selecting <b>Help &gt; Sage University</b> .
*Not all options are available for all products.		

## 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 then select **Help > Submit Product Idea**.