Sage Estimating (SQL) v17.13

Release Notes

December 2017

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Version 17.13 Release Notes

This document provides important information regarding new features and changes in your Sage Estimating 17.13 software. Read these release notes carefully before installing Sage Estimating 17.13.

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 17.13 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 17.13 before you upgrade.

New Features and Enhancements

Sage Estimating version 17.13 includes:

- Expanded Copy Assembly functionality
- New Advanced Reporting options
- Revised Standard Database window
- Improved database security
- Miscellaneous improvements

The following sections describe these changes in more detail.

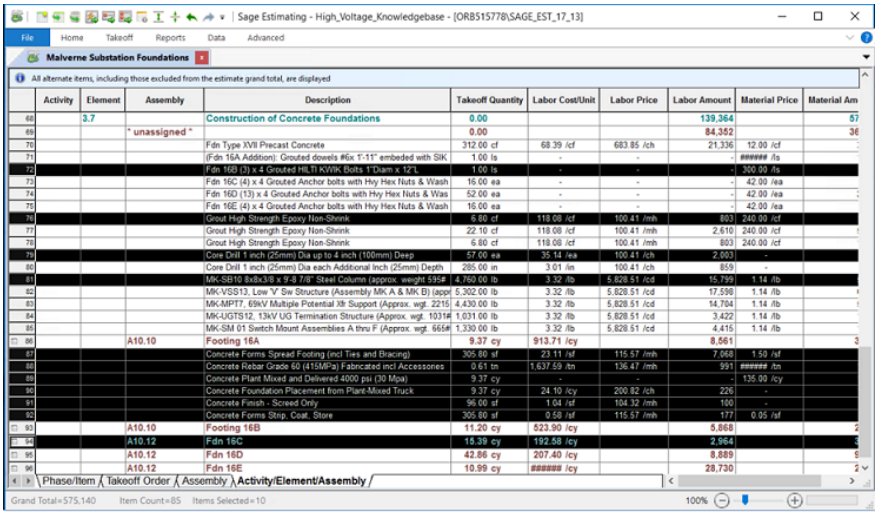
Expanded Copy Assembly functionality

Version 17.12 introduced the ability to copy assemblies *between* estimates, saving estimators time and effort when generating takeoffs, while retaining critical pass information that makes Smart Assemblies so useful.

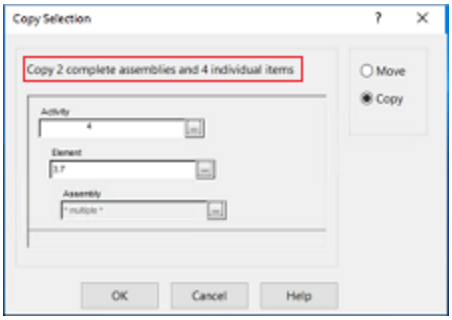
With version 17.13, we have improved the Copy Assembly functionality *within* an estimate. You no longer need to copy an assembly within the Assembly sequence first, and then move the items to a new WBS group separately. Now, you can move or copy selected items and/or assemblies to new or existing locations, WBS codes, or alternates in a single operation.

As with previous versions, the **Copy** operation is available after selecting a series of spreadsheet items and collapsed overlines.

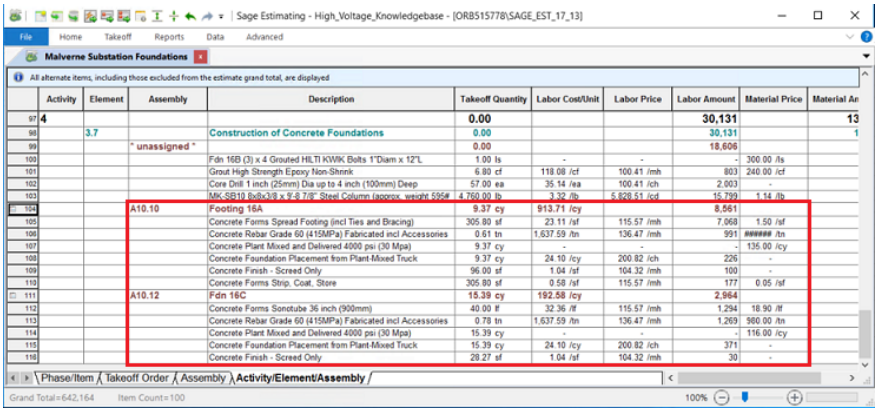
Tip: The Move/Copy window is now accessible from the spreadsheet's row header for most sequences.



Now, you can confirm the count of complete assemblies and items before proceeding.



Once processed complete assemblies appear intact, with all review assembly and pass details available.



If the items you select represent only part of an assembly, they are copied as ***unassigned*** items, with no associated assembly header or pass information.

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

New Advanced Reporting options

We've heard your requests for more flexibility in visualizing your estimates.

If you are an advanced user and you have a license for the Advanced Reporting module, you can take advantage of the following new report types when creating custom reports:

- SQL Server Reporting Services reports
- External reports

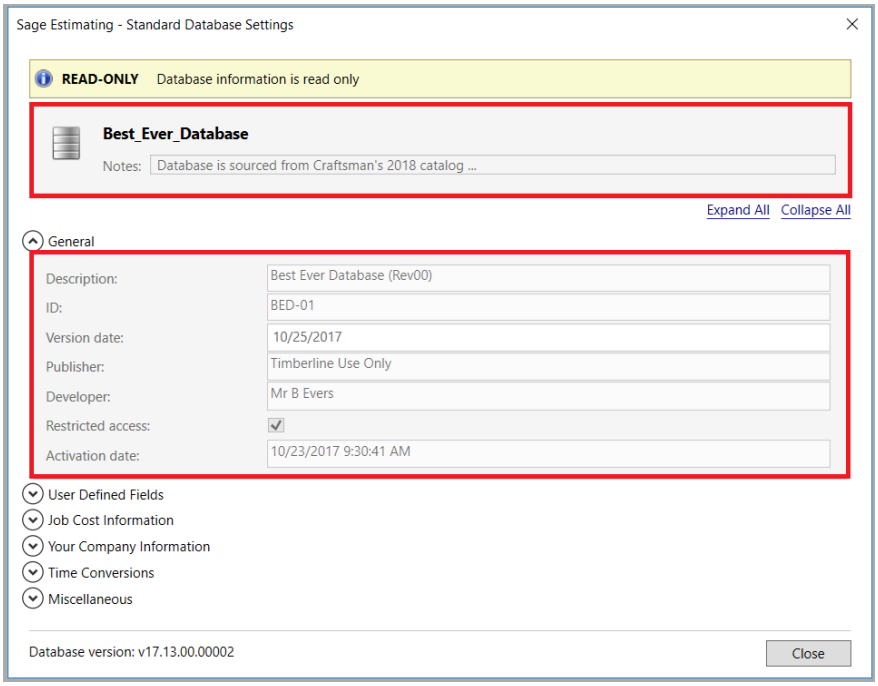
SQL Server Reporting Services (SSRS), part of the Microsoft SQL Server services suite, is a market-leading reporting technology. Using the Report Designer that comes with SSRS, you can quickly build and deploy sophisticated tables, charts and graphs. As with the existing Crystal report type, you can view these reports easily from Sage Estimating, and then export them to a PDF or Microsoft Excel format.

If you need even more versatility, you can use the **External** report type to run an independent report processor. The External report type liberates a creative report developer with programming experience to design reports to your exact specifications.

For more information about creating reports using the new report types, talk to your business partner.

Revised Standard Database window

In version 17.13, we have modernized the Standard Database settings window, making it consistent with the Estimate Information window.



A new **Notes** field enables database developers to document important information about the database, such as pricing sources, means and methods strategies, price update dates, and so on.

To enter a note, you click the new **[Notes]** button , which opens a separate Notes window.

A new **General** section contains additional database properties, including information about who created the database and when it was released.

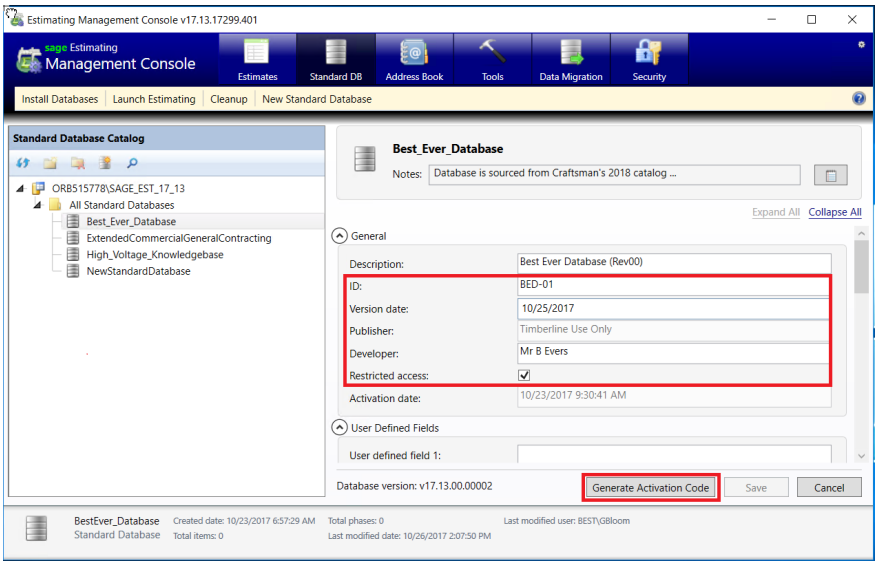
> **Note:** You require a new **Edit standard database settings** permission, as well as **Edit Standard Database** permission, to view the **[Edit]** button, which you must click before you can edit database settings or add a note for the database in this window.

For more information about standard database settings, as well as the new feature permission, see the Estimating Management Console help.

Improved database security

Sage is committed to protecting proprietary and sensitive data for both the developer who creates a database and the estimator who is using it. In version 17.13, we have strengthened security for standard cost databases, enabling database vendors and Sage consultants to control how the database is shared.

As a database administrator, you can restrict access to a database, making it impossible for unauthorized users to open it in Sage Estimating. Once you publish the database, you can generate an activation code for a specific registration name, authorizing the registered company to use the database.



Tip: You can also use this feature to control the distribution of databases you develop independently in your organization with partners and subsidiaries.

The rights properties are updated when you migrate or upgrade databases created with earlier versions of Estimating. If your database is protected exclusively for you, your organization is shown as the publisher. If you purchased the database (from Sage, for example), the vendor is the publisher.

For more information about restricting access to proprietary databases, see the Estimating help.

Miscellaneous improvements

Version 17.13 includes the following additional improvements:

- You can now view and edit the following estimate tables even when the standard cost database is closed:
  - Phase
  - Crews
  - Rate Tables
  - Cost Indexes
  - Bills of Material
  - WBS Settings and Values
- You can use the **Item Sort** icon on the **Data** ribbon to create additional item sorting options. This functionality was previously available from the Standard Database Settings window.
- Many editing functions are now available for both estimates and databases from the **Data** ribbon. (For example, you can use the **WBS** icon to edit WBS codes and values for estimates as well as for databases. Similarly, you can use the **Bill of Materials** icon to edit bills of material for estimates or for databases.)
- You can assign a new **Edit Standard Database Settings** feature to a role in the Estimating Management Console. Users who do not have this permission cannot edit the database settings.

Fixes Since the Previous Version

Version 17.13 includes the following fixes:

- When you open the **Standard Database Settings** window from the **File** menu in Estimating, the window correctly displays the settings for the standard database that is open in Estimating.
- Reprice Crews now updates only selected categories when you reprice an estimate.
- When you rename a crew resource using a numeric value, the resource name is now formatted properly.
- The spreadsheet report prints notes correctly when you select **Prefill from layout** on the **Font/layout** tab in the **Spreadsheet Report options** window.
- The Spreadsheet Layouts window is not hidden while it waits for a response from Estimating, so that it no longer appears to have stopped working when you have a large number of layouts.
- Estimating no longer stops working when an estimate scan encounters lump sum amounts.
- In the Estimating Management Console, when creating a new standard database, you no longer receive a "read catalog" error message when you try to Browse to the branch where you want to locate the new database.
- In the Estimating Management Console, you no longer receive an exception error if you click **EMC > Tools** when you have an invalid Estimates database.
- In the Estimating Management Console, when setting up a **Text** type job cost interface for a standard database, you no longer receive a "Job Cost Interface Failure" error when you click [**Setup**] in the Job Cost Information section.

Known Issues

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.

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**.