Sage Estimating

Sage Estimating

(formerly Sage Timberline Estimating)

Getting Started Guide

sage

Contents—Sage Estimating Operator's Guide

Chapter 1—Welcome to Sage Estimating

Sage is pleased to welcome you as a client. If you are new to Sage Estimating, or you want to know how to use this new release, read this booklet to find out how Sage Estimating can help you create, organize, manage, and analyze hundreds of estimates.

Sage Estimating gives you the flexibility, speed, and accuracy to generate competitive estimates, bids, and budgets. An innovative spreadsheet interface is supported by fast takeoff tools, a comprehensive price database, and a wide range of ways to analyze and fine-tune your project.

About This Booklet

This booklet covers the following topics:

- Get Help—a discussion of the Help system and useful contact information.
- Learn Basic Concepts—the concepts and philosophy behind Sage Estimating.
- Create a New Estimate—learn how to create a new estimate.
- Perform Takeoff—instructions for copying information from a standard database into an estimate.
- Work with the Spreadsheet—learn how to navigate the Sage Estimating spreadsheet.
- Print Reports—learn how to prepare and print reports.
- Use Address Book—learn how to set up the Estimating Management Console Address Book to store contact information.
- Advanced Features—learn how to use advanced Sage Estimating features.

Ways to Get Help

Use Sage Estimating Help or the Sage Customer Portal to get answers to your questions. You can also call Customer Support. See below for more information.

The Help System

Sage Estimating's efficient Help system provides faster access to more information than most manuals. With a click of the mouse or a keystroke, you can easily get Help for a command, a field, a window, or a procedure.

To get Help on a window option

Help is available on virtually every option within a window. To access the Help, do one of the following:

- Click [**What's This?**] on the toolbar or on the title bar and then click the option.
- Select **What's This?** from the **Help** menu and then click the option.
- Select the option and press F1.

To get Help for the whole window

For information about the window, such as the window's purpose and what tasks you can perform in it, click [**Help**] at the bottom of the window.

Figure 1: The Window Help Button
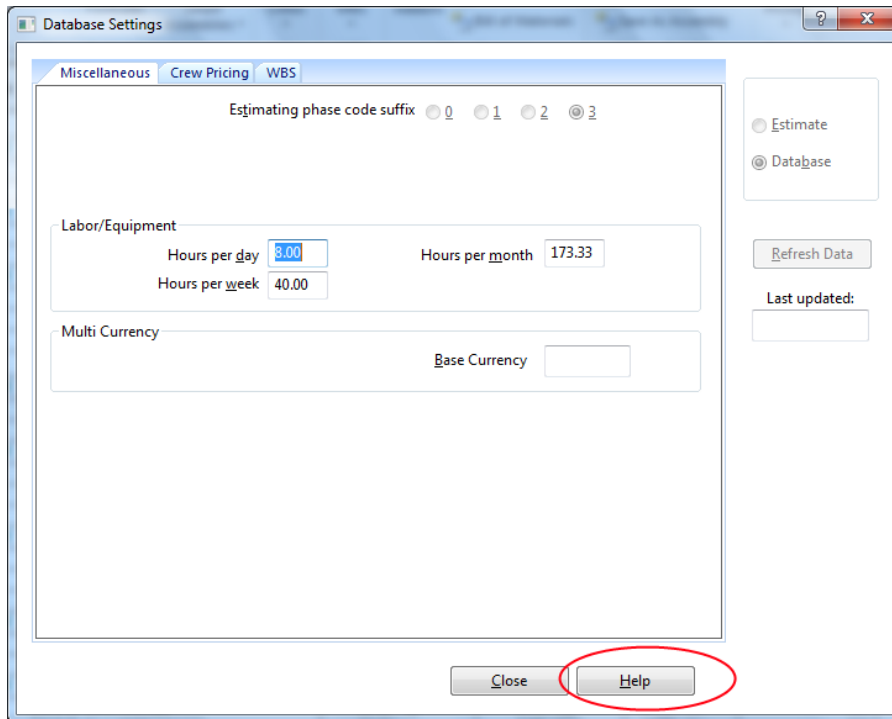
To use Help to learn how to do tasks

1 Click [**Help**] on the toolbar or select **Home** tab > **Help** group > **Help** (or select **Help** menu > **Help topics** in classic view).

Figure 2: The Help Window
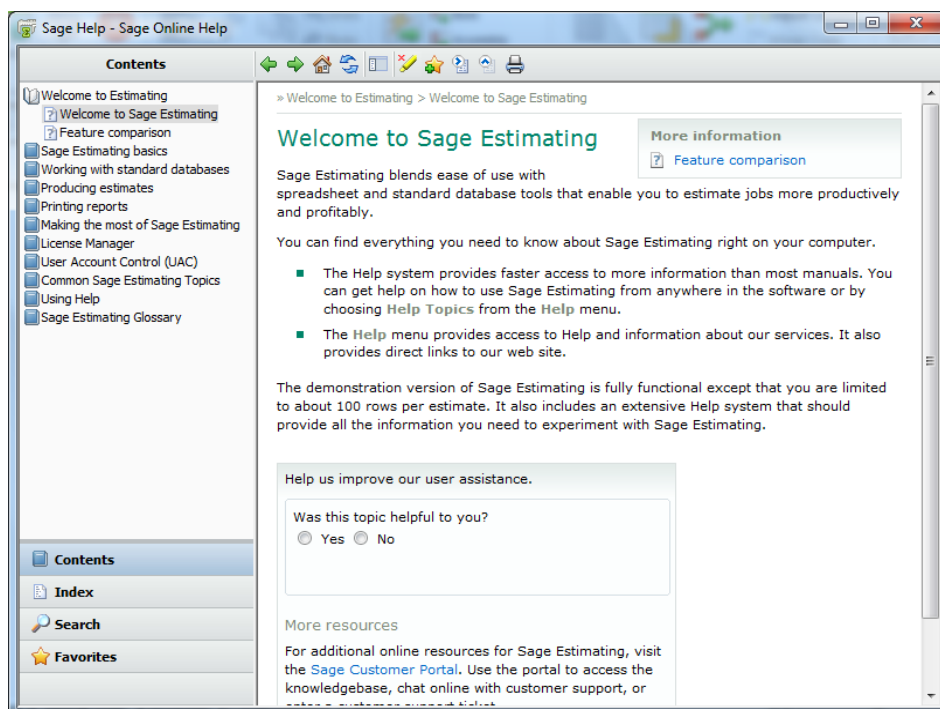
2 Select one of four tabs on the navigation pane to begin looking for a topic.

- **Contents** contains Help subjects organized within books.

- **Index** contains an alphabetical list of Help subjects.

- **Search** looks through every word in Help to find matches for your search query.

- **Favorites** contains Help topics you have previously flagged as favorites. This tab lets you find specific Help topics quickly.

When you see the topic you want, double-click it to display it.

3 Use the buttons on the toolbar to:

- Move back and forth between topics you have already read.

- Return to the introductory topic.

- Refresh the displayed topic.

- Hide or display the navigation pane.

- Hide or display key word highlighting.

- Add a Help topic to the **Favorites** page.

- Print the current topic.

Read the Supporting Documentation Before You Begin

Be sure to read supporting documentation before you begin:

- This *Getting Started Guide* provides an operational overview of the Sage Estimating software.

- The *Installation & Administration Guide* includes an overview of this release, installation instructions, system requirements, and contact information. This document is available in your Sage Estimating installation files in the **Documents** folder.

- The *Release Notes* provide details about new features, database changes, known issues, and fixes. This document is available in your Sage Estimating installation files in the **Documents** folder.

- The *SQL Server Guide* gives you an overview of the significant differences between the new SQL Server databases and the Pervasive databases used in previous Sage Estimating releases. This document is available in your Sage Estimating installation files in the **Documents** folder.

- The *Options Guide* provides installation, setup, and operating instructions for each of the available Sage Estimating options, such as the OnScreen Takeoff Integrator or License Manager. This document is available in your Sage Estimating installation files in the **Documents** folder.

Conventions Used in this Document

This document uses the following conventions:

- Information you type into the software is shown in bold font. For example: Type **Miscellaneous** in the box.

- The names of screens, windows, fields, and other features displayed by the software are shown in **bold font**.

- The names of buttons you can click are enclosed in brackets with bold font. For example: [**OK**] or [**Post**].

- Names of keys are shown in capital letters. For example: ENTER or TAB. A plus sign (+) between two key names indicates you should press the keys simultaneously.

- Variable names or names that are specific to your installation may appear in italics and brackets. For example: [*Drive*]\\[*Server*].

Symbols

NOTE: This symbol is used when presenting information that is supplemental to the adjacent text.

TIP: This symbol is used when presenting helpful information for using the software.

CAUTION: This symbol is used when presenting important information to help you avoid a loss of critical data.

IMPORTANT: This symbol is used when presenting information that is critical to understand or that requires you to take action.

Menu Paths

In this document, menu paths show you the steps required to start a task. Menu paths appear in bold font with angle brackets around buttons. For example:

"If the program does not automatically start, click [**Start**] > **Run**."

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 Estimating on the Web** > **Sage University**.

Technical Assistance

Depending on your support plan, you can access any of the following online services.

Sage Customer Portal

- **Knowledgebase:** Find answers to your questions, access downloads, and subscribe to your favorite articles. This service is available online 24/7.
- **Live Chat:** Chat online with a customer support analyst - a great option for quick questions. Chat hours are the same as our telephone support hours (see below).
- **Online Support Request:** Submit an online support ticket when you have a non-urgent question. One of our call center support analysts will assist you. Online support hours are the same as our customer support call center hours (see below).

Sage Customer Support Call Center

Telephone Support: When you have a more urgent question or would prefer to speak to a customer support analyst directly, call us at 866-991-3359. Telephone support is available Monday through Friday from 6 a.m. to 5 p.m. Pacific time with the following exceptions:

- Every Thursday from 2 p.m. to 3 p.m. Pacific time (closed for customer support staff meetings)
- Standard United States holidays
- Quarterly company meetings

Upgrading Your Service Plan

If your service plan does not provide online or telephone customer support and you would like to add or upgrade a service plan, please call 800-858-7098.

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** > **Sage Estimating on the Web** > **Submit Enhancement Requests**.

Chapter 2—Learning Basic Concepts

Sage Estimating Ribbon Layout

Sage Estimating uses a "ribbon" layout instead of a menu layout.

The ribbon menu replaces the conventional "classic view" menu layout found in previous releases. The ribbon layout functions by grouping similar tasks onto the same tab. For example, tasks related to the estimate spreadsheet, such as those for modifying the spreadsheet layout, are found on the **Home** tab as shown in the following figure.

Figure 3: The New Ribbon Layout
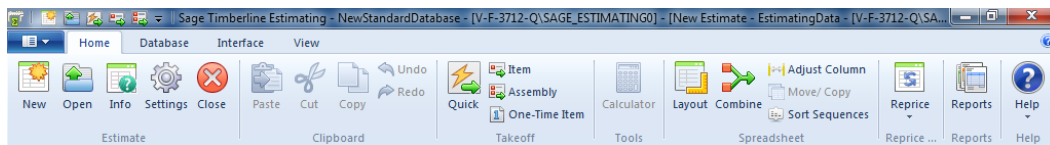
Tasks are further grouped within each tab according to functionality. Takeoff functions, for example, are found in the **Takeoff** group of the **Home** tab.

Double-click any tab on the ribbon (**Home**, **Database**, **Interface**, or **View**, for example) to collapse the ribbon and save space. The collapsed ribbon appears as shown in the following figure.

Figure 4: Collapsed View of the Ribbon
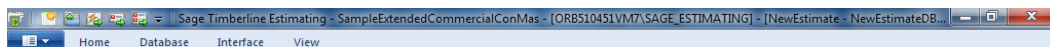
Ribbon tabs remain visible while the ribbon is collapsed. Hover the cursor over any tab on the collapsed ribbon if you want to view the ribbon contents.

Double-click any tab again to expand the ribbon.

Classic View

If you install Sage Estimating on a computer with the Windows XP or Windows Server 2003 operating system, the ribbon layout is not supported; the Sage Estimating software automatically reverts to the familiar menu layout instead.

If you are using an operating system that supports the ribbon layout but you want to use the "classic view" menu convention instead, perform the following steps:

1 Start the Estimating Management Console.

2 Click on the **Preferences** tab.

3 Select the **Spreadsheet** preferences in the **My Preferences** pane.

4 Select the **Use classic menu bar controls** check box.

5 Restart the Sage Estimating software for your changes to take effect.

Working With the Database and Estimates

Sage Estimating stores your estimating information in three places:

- **Estimate database:** Stores your individual project estimates. Each estimate contains information for a specific project, such as the projected cost, quantity of material, labor, equipment, subcontractors, and other items.

- **Standard database:** Contains a catalog of information for use with estimates, such as a list of items and assemblies, prices, calculation methods, and conversions. This database functions as a "resource book."

  The standard database and estimates are completely separate. If you update the standard database, information in the estimate remains unchanged. Similarly, if you change the estimate, the standard database is not automatically affected. You can update an estimate with price changes made in the standard database (or a standard database with changes made in the estimate) by selecting the **Reprice Estimate** (or **Update Database**) option.

- **Address Book database:** Stores all your contact information for individuals and organizations.

Learning About the Estimate Database

The estimate database stores your estimates. You can organize estimates according to "branches" or tiers. The estimate branches and estimate sub-branches you create are for display purposes only; the structure of your estimate database does not actually change.

Figure 5: Storing Estimates in the Estimate Database

SQL Server

New Server (local\SAGE_EST_12_1)

NewEstimateDB (.mdf file)

Each estimate list displays the branches you create but the estimates remain stored on the same level within the estimate database.

NewEstimate

BuildingElectrical

▲ V-F-3712-Q\SAGE_EST_12_1 ✔
   ▲ All Estimate Databases
      NewEstimateDB ✔
   ▲ All Estimates
      ▲ New Estimates
         NewEstimate
      City Hall
      BuildingElectrical
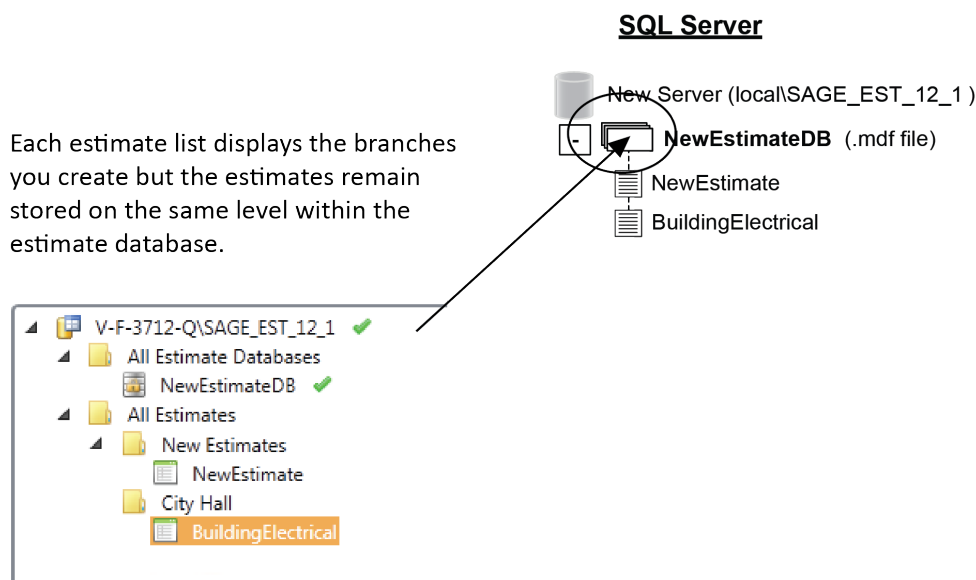
The Estimating Management Console secures the estimate database by enabling record security automatically. You can uninstall the record security if desired. For more information about estimate database record security, see the Estimating Management Console in-product Help.

Learning About Estimates
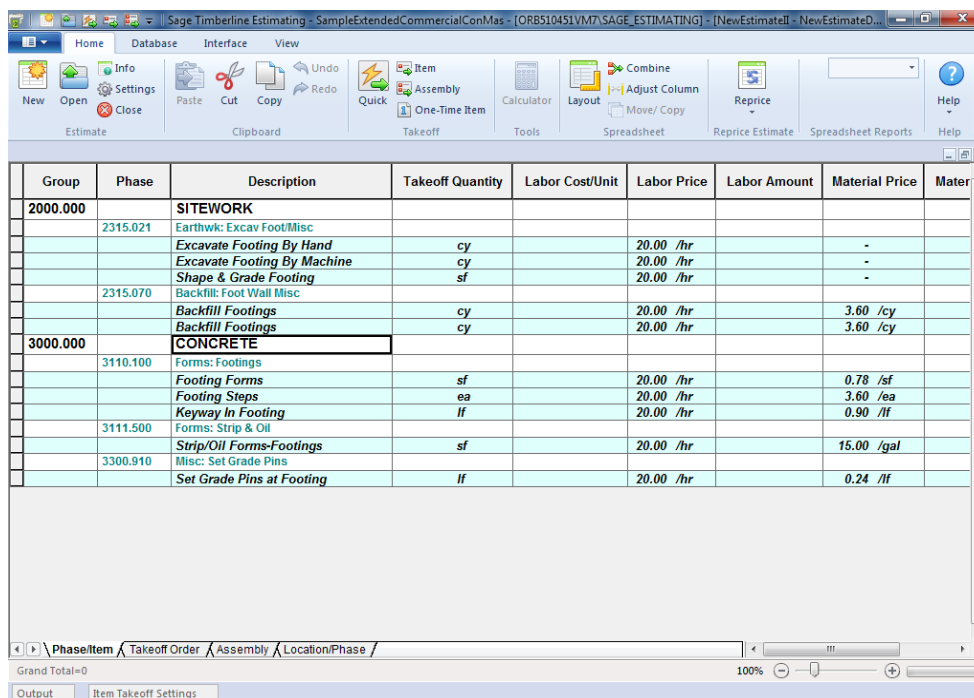
In essence, the Sage Estimating spreadsheet is the estimate. It presents the items, quantities, and monetary amounts that make up an estimate, in a format designed specifically for estimating. Changes you make to your estimates are saved to the designated estimate database automatically as you work.

Viewing Estimate Information

The spreadsheet window is the primary place where you view estimate information. From there, you can open other windows to see totals for the estimate or the details associated with each item.

In the spreadsheet, you control the placement of columns, whether they are visible, and even what labels appear in the column header. You can also use a spreadsheet layout when you create estimate reports.

Figure 6: The New Layout

(In classic view, the spreadsheet appears as follows:)

Figure 7: Classic View Layout

Learning About The Standard Database

The database contains all the standard cost items you use, including item productivity factors, waste factors, and prices. In addition, there are phases for organizing items, formulas for calculating quantities, assemblies for taking off groups of items, subcontractors, crews, work breakdown structures, and markups for adding special costs to the estimate.

Without a standard database, you would have to enter information over again for every estimate. But if you set up a standard database, you can enter the information once and find just what you need for each estimate. You can copy information from the standard database into the estimate (a process known as *takeoff*), and enter dimensions and specifications as required.

Accessing the Standard Database From the Estimate

You can quickly access the standard database while you are working on an estimate. This lets you change or add new information to the standard database without closing the estimate. While changes made in the standard database do not affect items that are already in the estimate, the new information appears in the estimate the next time you perform takeoff.

Learning About the Address Book Database

The Address Book database stores contact information, such as address, email, and phone numbers, for individuals and organizations in estimates. You set up your Address Book contacts using the **Address Book** window in Sage Estimating.

Refer to "Chapter 7—Using Address Book" on page 32 for more information about creating Address Book contacts.

Chapter 3—Creating a New Estimate

Creating a New Estimate

To start an estimate, you must first create the estimate database (using the configuration wizard) for storing your estimates. Then when you create the new estimate, specify an estimate name, associated standard item database (if desired), and an organizational "branch" where you want the estimate displayed.
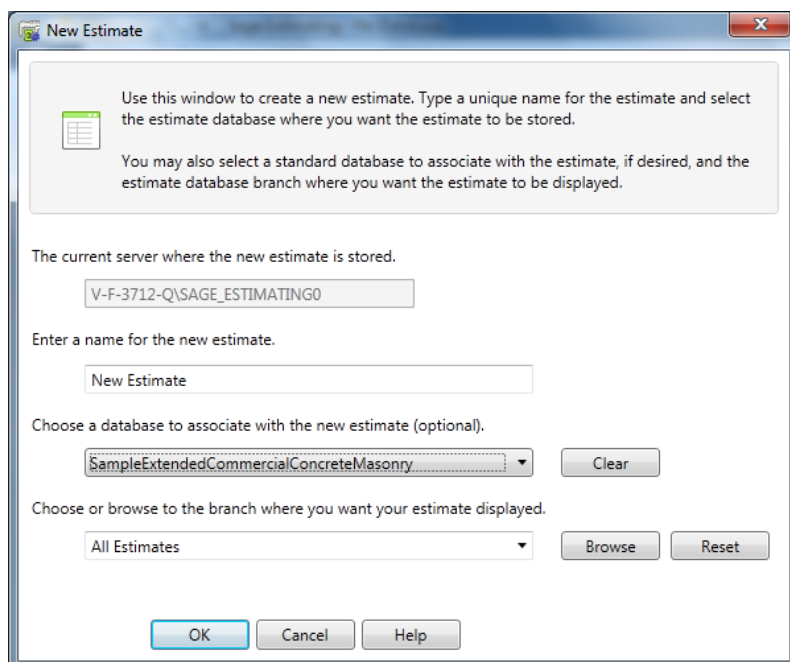
You can create a new estimate from the Sage Estimating software by clicking **New** (**Estimate** group of the **Home** tab) or by selecting the **Estimate** tab of the Estimating Management Console.

NOTE: In classic view, use the **File** menu to select the new estimate command.

To create a new estimate:

1 In the Sage Estimating main window, select **New** from the **Estimate** group of the **Home** tab. This opens the **New Estimate** window.

Figure 8: The New Estimate Window

Alternatively, if you are using classic view, click **New Estimate** on the **File** menu to open this window.

2 In the **New Estimate** window, specify the following estimate information:

- A name for the new estimate

- The standard item database you want to associate with the new estimate, if desired. Sage Estimating opens the selected database automatically whenever you open the estimate.

- The branch in the **My Estimates** pane of the Estimating Management Console where you want the estimate displayed.

NOTE: Estimates are displayed in the Estimating Management Console according to tiers or "branches" that you create. These branches are for organizational purposes only. The structure of your database does not change.

3 Click [**OK**]. The Sage Estimating software creates the new estimate and opens the **Estimate Information** window.

4 Complete the fields on the tabs of the **Estimate Information** window. At a minimum, edit or accept the project name displayed in the **Project name** field.

The **Job size** field is required if you want Sage Estimating to calculate the cost per unit for the job in the **Totals** window.

5 When you finish entering information about the estimate, click [**OK**].

6 If desired, you can also click the File menu button to start a new estimate from scratch, create a duplicate of an existing estimate, or merge several existing estimates into one new estimate.

Chapter 4—Performing Takeoff

Performing Takeoff

After you create an estimate, you select items and specify their estimated quantities. You can enter takeoff quantities or have Sage Estimating calculate them for you. When you perform takeoff, Sage Estimating copies everything associated with the selected items into the estimate and calculates their takeoff quantities.

Quick Takeoff

Quick takeoff is a fast, easy way to get items into your estimates. You have the option to specify takeoff quantities before or after items are in the spreadsheet. Once there, you can specify the item quantities by:

- Using the formula attached to each item.
- Using the Sage Estimating or Microsoft Windows calculator.
- Using one value to fill in other quantities.
- Using **Enter Dimensions**.
- Making manual entries.

To perform quick takeoff:

1 Click [**Quick Takeoff**] in the **Takeoff** group of the **Home** tab to open the **Quick Takeoff** window.

Figure 9: The Quick Takeoff Window
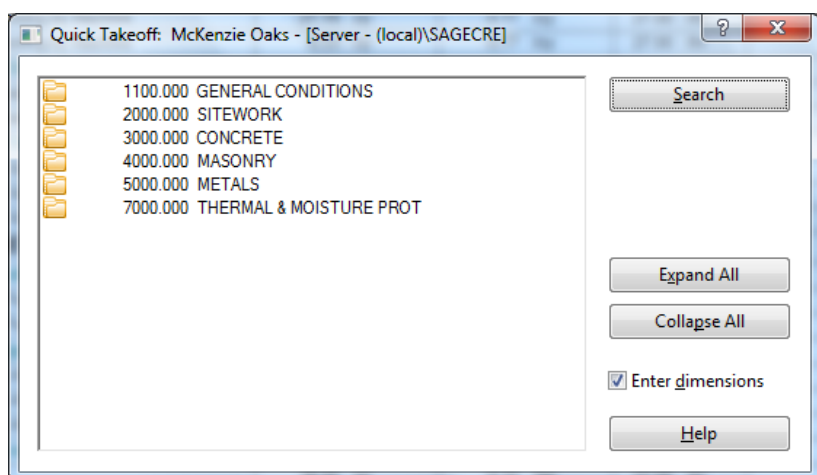
In classic view, select **Takeoff** menu > **Quick Takeoff** or click the Quick Takeoff icon in the toolbar.

2 (Optional) Select the **Default Location/WBS** check box in the **Show/Hide** group of the **View** tab to display the **Item Takeoff Settings** window. (In classic view, select **View** menu > **Default Location/WBS**.)

Use this window to set a location and work breakdown structure (WBS) for your takeoff items.

3 Select an item and take it off using one of the following methods:

- Locate the item in the list and then double-click (or drag and drop) the item to take it off.

- Click [**Search**] to open the **Search** field, in which you can enter search criteria for the item. After you find it, double-click (or drag and drop) the item to take it off.

- Right-click and select **Sort item list by** then select an option from the drop-down list to organize the list in a different sort order. You can sort by phase/item or description. You can also use a custom sort based on WBS codes. Locate the item in the list and then double-click (or drag and drop) the item to take it off.

4 Take off additional items in the same manner. You can select multiple items in the list.

5 Enter or calculate the item takeoff quantities. To calculate quantities you can:

- Use the calculator.

- Use formulas.

- Manually enter quantities.

6 You can also right-click in the takeoff **Quantity** column to select these additional options:

- Use **Enter Dimensions**. This option is only available after you use your mouse to select multiple cells in the **Quantity** column.

Item Takeoff

Item takeoff is a convenient way to take off groups of items and quickly calculate their takeoff quantities. You can review items and modify them for use in the current estimate before you generate them to the spreadsheet.

To perform item takeoff:

1 Click [**Item**] in the **Takeoff** group of the **Home** tab to open the **Item Takeoff** window.

If you are using classic view, select **Takeoff** menu > **Item Takeoff** or click on the Item Takeoff icon in the toolbar.

Figure 10: The Item Takeoff Window
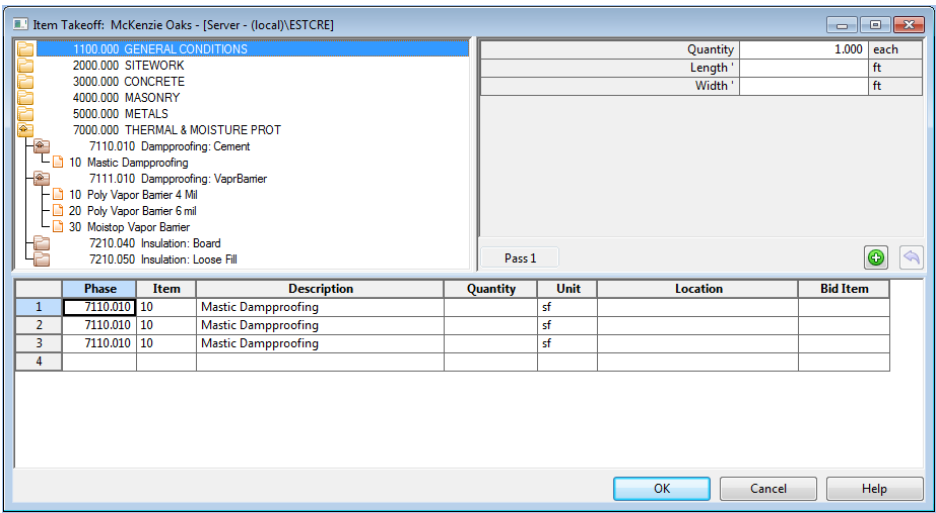
2 (Optional) Select the **Default Location/WBS** check box in the **Show/Hide** group of the **View** tab to display the **Item Takeoff Settings** window. (In classic view, select **View** menu > **Default Location/WBS**.)

Use this window to set a location and work breakdown structure (WBS) for your takeoff items.

3 Select an item and take it off.

4 (Optional) Right-click on the item list and select **Sort item list by** to organize the list in a different sort order. Or select **Search** to find a specific item in the list.

If you have formulas assigned to your takeoff items, Sage Estimating displays the variables (dimensions and specifications) for them in the variable pane.

5 Enter the item takeoff quantities in the takeoff grid.

6 Review the items in the takeoff grid. If necessary, you can change an item description, change item details, delete an item from the grid, and save the items as an assembly.

7 Click [**OK**] to generate the items to the spreadsheet.

Assembly Takeoff

You can streamline the takeoff process by taking off assemblies. For example, instead of taking off each item that makes up a standard-sized wall, you can take off an assembly containing all the items needed to construct the wall.

To perform assembly takeoff:

1 Click [**Assembly**] in the **Takeoff** group of the **Home** tab to open the **Assembly Takeoff** window.

In classic view, select **Takeoff** menu > **Assembly Takeoff**.

Figure 11: The Assembly Takeoff Window

2 (Optional) Select the **Default Location/WBS** check box in the **Show/Hide** group of the **View** tab to display the **Item Takeoff Settings** window. (In classic view, select **View** menu > **Default Location/WBS**.)

Use this window to set a location and work breakdown structure (WBS) for your takeoff items.

3 Select an assembly and take it off.

If you use formulas in your assemblies, Sage Estimating displays the variables (dimensions and specifications) for the assembly in the variable pane.

4 ⊕ Enter the variable amounts in the variable pane or enter a takeoff quantity in the takeoff grid. Click [**Add Pass**] to calculate quantities for items with formulas.

5 Review the items in the takeoff grid. If necessary, you can change an item description, change item details, add an item to the assembly, delete an item from the grid, or substitute an item in the grid.

6 When you are ready to generate the assembly to the spreadsheet, click [**OK**] in the **Assembly Takeoff** window.

Review Assemblies

You can review and change assemblies already in the estimate. Sage Estimating tracks all of the passes generated during assembly takeoff and lets you:

- Check the dimensions entered for each pass.
- Change dimensions and make additional passes for the same items.
- Change dimensions and replace existing passes.
- Add or delete items.
- Attach a note to any pass.

To review a pass

1 Click [**Assembly**] in the **Takeoff** group of the **Home** tab.

In classic view, select **Review Assemblies** from the **Takeoff** menu or click the Assembly Takeoff icon in the toolbar.

2 Right-click on the assembly that you want to review and select **Review Assemblies**.

Figure 12: Reviewing Assemblies from the Assembly Takeoff Window
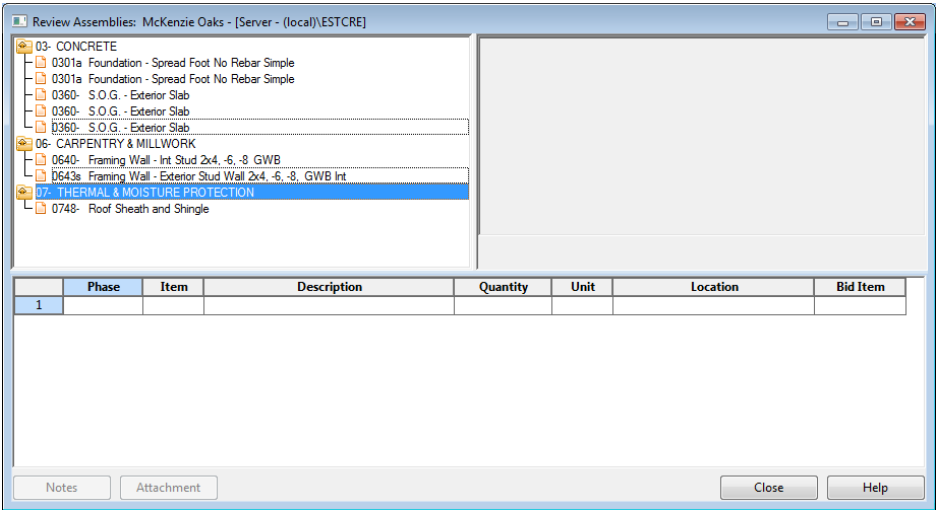
3 Click the pass that you want to review.

To revise an existing pass

1 In the variable pane, change the dimensions in the **Quantity**, **Length**, and **Width** boxes.

2 Click [**Replace Pass**] to revise the existing pass.

3 Click [**OK**] to send the changes to the spreadsheet.

NOTE: You can also add a pass [**Add Pass**], add notes to a pass [**Pass Note**], or undo a pass [**Undo Last Pass**] that has not yet been generated to the spreadsheet.

One-Time Item Takeoff

One-time items are items that do not already exist in your database. They may be unusual items that you want to include in an estimate without first having to set them up in the database.

To perform one-time item takeoff:

1 Click [**One-Time Item**] in the **Takeoff** group of the **Home** tab. The **One-time Item** window opens.

In classic view, select **Takeoff** menu > **Takeoff Tools** > **One-Time Item** or click the One-Time Takeoff icon in the toolbar.

Figure 13: The One-Time Item window

2 Complete the fields in the window. At a minimum, you need to complete the **Phase**, **Description**, and **Takeoff unit** fields to set up a one-time item.

3 (Optional) Click [**Go to Detail**] to enter more information about the item.

4 When you finish setting up the item, click [**OK**] in the **One-time Item** window. The item appears on the spreadsheet or in the takeoff grid if you are taking off a one-time item from the **Item Takeoff** window. Hyphens in the **Item** column (----) identify a one-time item in the spreadsheet. If you did not select [**Go to Detail**] in step 3, you can enter details directly to the item in the spreadsheet.

NOTE: If you want to add your one-time items to your database, you can easily do so by selecting [**Save One-Time Items**] from the **Update Database** group of the **Database** tab (or, in classic view, select **Pricing** menu > **Update Database** > **Save One-time Items to Database**).

Chapter 5—Working with the Spreadsheet

The Spreadsheet Window

The spreadsheet window contains columns with the quantities and category information for all items in the estimate.

Figure 14: The Spreadsheet Window

(In classic view, the spreadsheet window appears as follows:)

Figure 15: The Spreadsheet Window in Classic View

Spreadsheet Window Ribbon

The spreadsheet window provides a "ribbon" above the spreadsheet for easy access to the common commands as described below. For information about accessing these commands using keyboard shortcuts, refer to the appendix.

NOTES:

- The ribbon is not available in classic view. Instead, these commands are available in the "classic view" menu format or in a toolbar at the top of the window.

- In this booklet, instructions that include these commands often include a picture of the icon as well.

Table 1: Frequently-Used Spreadsheet Icons

Icon	Command	Purpose
	Expand	Displays the spreadsheet with one more level of detail.
	Collapse	Displays the spreadsheet with one less level of detail.
	Layout	Lets you create, modify, delete, or apply a custom layout to the spreadsheet.
	Quick Takeoff	Perform takeoff directly from the item list. Available only when a database is open.
	Item Takeoff	Opens the **Item Takeoff** window, in which you choose the items and specify their takeoff quantities. Available only when a database is open.
	Assembly Takeoff/Review	Opens the **Assembly Takeoff** window, in which you choose an assembly and specify the takeoff quantities for its items. Available only when a database is open.
	One-time Item	Creates a one-time item for the current estimate. You enter the phase, description, takeoff quantity, unit, and categories.
	Combine	Lets you combine matching items in the spreadsheet.
	Scan Estimate	Lets you find incomplete items in the spreadsheet.
	What's This?	Displays Help for a button, command, or window.

Changing the Appearance of the Spreadsheet

The spreadsheet includes over 100 columns of information. Sage Estimating makes it easy for you to adjust the appearance of the spreadsheet to suit your needs.

You decide:

- Which columns are visible and where they are positioned.

- What names appear as column headers and how wide each column is.

- Whether you want to organize items by phase, location, takeoff order, assembly, or a customized spreadsheet sequence.

- How many levels of detail you want to see.

- What fonts and colors are used for text and numbers.

In addition, you can set up an unlimited number of layouts. For example, you can design a labor-only layout or a material-only layout.

To set up a spreadsheet layout:

1 Click [**Layout**] in the **Spreadsheet** group of the **Home** tab (or, in classic view, select **View** > **Spreadsheet Layout**) to open the **Spreadsheet Layouts** window.

This window lists the layouts set up for the current spreadsheet sequence.

Figure 16: Selecting a Spreadsheet Layout for Modification
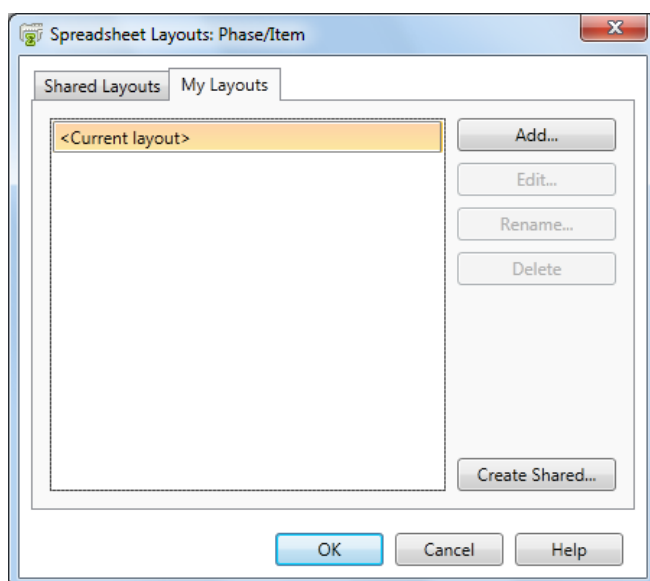
2 Click a button in the **Spreadsheet Layouts** window to continue.

- To set up a new layout, click [**Add**] and type a name for the new layout to add it to the list.

- To modify an existing layout, select the layout in the list and click [**Edit**] to set the options in the **Modify Spreadsheet Layout** window.

- To rename a layout, select an existing layout from the list and click [**Rename**].

- To delete a layout from the list, select the layout in the list and click [**Delete**].

3 Set the options in the **Modify Spreadsheet Layout** window.

  □ To show a column in the spreadsheet, select the corresponding **Visible** check box.

  □ To hide a column, clear the corresponding **Visible** check box.

4 Click [**OK**] to save the spreadsheet layout and close the **Modify Spreadsheet Layout** window.

Changing Item Prices and Quantities

As you work on an estimate, you can change prices and quantities to reflect the latest information. For example, you can enter quotes for materials.

To change prices and quantities:

1 On the spreadsheet, click the appropriate category **Price** cell for the item. For example, to enter a quote for an item's material price, click the **Material Price** cell.

2 Enter the new price.

3 If other items in the spreadsheet are linked to this item, the following question appears: **Would you like to update prices for linked items?**

  □ Click [**Yes**] to change the prices of linked items too.

  □ Click [**No**] to change the price of this item only.

4 If the spreadsheet contains duplicates of this item, the following question appears: **Would you like to update prices for duplicate items?**

  □ Click [**Yes**] to change the prices of duplicate items too.

  □ Click [**No**] to change the price of this item only.

Finding Incomplete Items

To make sure your estimate is complete, you can scan it for missing takeoff quantities, prices, amounts, or subcontractor names (if an item has a subcontract amount).

To scan for incomplete items:

1 Position the cursor anywhere on the spreadsheet.

2 Click [**Scan Estimate**] from the **Window** group of the **View** tab.

  (If you are using classic view, **Pricing** menu > **Scan** or click the scan button on the toolbar.)

3 Sage Estimating stops at the first cell that is empty or contains a zero. Fill in the missing quantity, amount, price, or subcontractor name. If you need to do more research before you supply a value, leave the cell blank for now.

4 Repeat step 2 until no more incomplete entries are found. (When Sage Estimating reaches the bottom of the spreadsheet, it resumes scanning from the beginning of the spreadsheet.)

The Detail Window

The **Detail** window lets you view the information about a row in the estimate spreadsheet or takeoff grid. This window contains information about the selected spreadsheet row as specified for the estimate. Sage Estimating saves your entries when you click [**OK**]. Changes you make are saved with the estimate and do not affect the database.

To open the **Detail** Window:

1 Select the **Detail** window check box from the **Show/Hide** group of the **View** tab (or, in classic view, select **View** menu > **Detail Window**).

2 Alternatively, you can open the **Detail** window by right-clicking on a cell and selecting **Detail Window** or by pressing CTRL+D from the keyboard.

Figure 17: Editing Item Details

The Totals Window

The **Totals** window shows a summary of the cost category and estimate totals. It also lets you include addon costs (markups) in the estimate.

To open the **Totals** window:

1 Select the **Totals** check box from the **Show/Hide** group of the **View** tab or press F4 (or, in classic view, select **Takeoff** menu > **Estimate Totals**).

The **Totals** window opens. You can see the totals for each cost category, markup, and subtotal along with the total cost of the estimate.

Figure 18: Viewing the Totals Window

2 🖶 To print the totals, click the print icon on the toolbar. If the toolbar does not appear, click [**Show Toolbar**].

Formatting the Totals Window

You can format the **Totals** window to change its visual appearance. You can also hide fields to prevent them from printing on reports. Any layout changes you make to the window print on your report if the option to print totals is selected on your report.

To format a column in the Totals window

1 With the **Totals** window open, right-click on a column heading and select **Format Column**. The **Format Column** window appears.

2 Make changes to the column. Changes you can make include:

- ▫ Column name
- ▫ Column width
- ▫ Alignment
- ▫ Number of decimals
- ▫ Background color
- ▫ Font

3 Click [**OK**] to save your column changes.

You can also format rows or individual cells. To format a row, right-click on the row header and select **Format** [row name] **Rows**. To format a cell, right-click in the cell and then select **Format Cell**.

To hide a column on the Totals window

Hiding columns prevents them from showing up on reports, but does not remove the amounts from the totals.

1 With the **Totals** window open, right-click on a column heading and select **Hide On Reports**.

2 If you receive a warning that hidden numbers may cause some totals to appear incorrect, click [**OK**]. (This does not mean the numbers are incorrect, only that they may appear to be, because numbers that are used in the total calculation are not visible.)

3 Click [**OK**].

You can also hide rows or individual cells. To hide a row, right-click on the row header and select **Hide on Reports**. To hide a cell, right-click in the cell and then select **Hide on Reports**.

To insert addons in the Totals window

Addons represent the additional cost or markup that contractors add to their estimates. It is cost over and above the actual cost to contractors and represents their indirect costs and budgeted profit. Types of addons include overhead, taxes, profit, and other costs.

You can choose addons for the estimate before or after takeoff. Some estimators like to set them up before takeoff so that they can see how the overall estimate is shaping up as they work.

Where you insert each addon determines which estimate costs are used to calculate the addon amount. An addon should come after the subtotals and addons you want to include. This is especially important for addons based on subtotals.
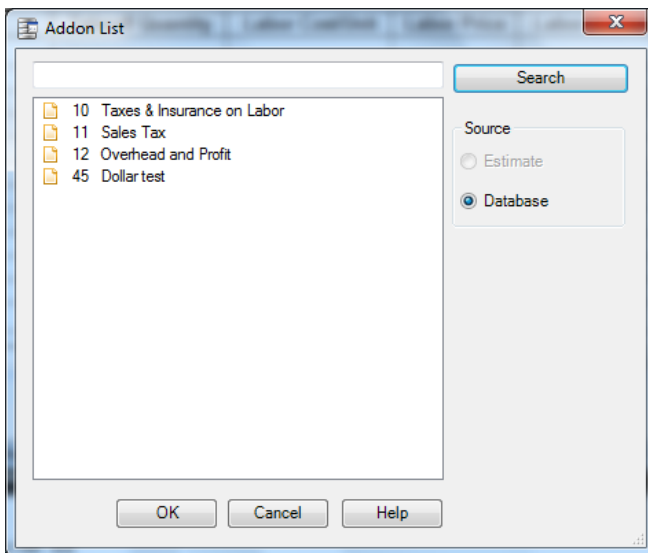
1 Click on the row header where you want to create the addon.

2 Click [**Insert Addon**].

Figure 19: The Addon List Window

3 Double-click the addon to select it.

You can select multiple addons if necessary.

4 When finished, click [**Close**].

5 Click [**OK**].

To insert subtotals

Where you insert a subtotal determines which estimate and addon costs it includes. Each subtotal is the sum of the previous subtotal (if any) and the amounts between it and the previous subtotal.

For example, if the previous subtotal was $200 and a total of $100 appears between it and the next subtotal line, the next subtotal amount is $300.

1   Right-click on the row header where you want the subtotal to appear.

2   Select **Insert Subtotal**.

3   (optional) Type a description in the **Description** column.

Docking the Totals window

You can dock and position the **Totals** window within Estimate window to make it easy to work in both areas at the same time.

To select a docking option, "grab" the **Totals** window toolbar and reposition it:

- You can position the window so that it "floats" on top of an estimate by dropping it at any location in the main window.

  - If you have multiple estimates open, the window shows the data of the active estimate. To float the window, drag it over the estimate or double-click the title bar of the window when it is docked.

  - When you dock a window to either side of the estimate, you can resize the window and use the arrow keys in the window to move right and left through the columns.

  - You can resize the window while it is floating.

  - When you open the window, it appears the same as it was when you last used it, including whether you had the toolbar showing or not.

- You can "dock" the window to the left, right, top, or bottom of the main window by moving it over one of the corresponding arrows at the edge of the main window—or in the bulls eye at the center—and releasing.

Figure 20: The Window Docking "Bulls Eye"

Chapter 6—Printing Estimate Reports

You can print an estimate report on paper, preview it on your screen, or export it to a PDF file, an Excel file, or an ASCII text file. The printing procedure is similar no matter which report you choose to print.

You can also set up customized cover pages, headers, footers, and a signature block for each estimate report. Once you have a presentation you like, you can save it to a named layout for printing that report in the future.

To print an estimate report

1 Open an estimate. (You must have an estimate open because the report information comes from the current estimate.)

2 In the **Spreadsheet Reports** group of the **Home** tab, select the report you want to print.

(In classic view, select your report from the **Reports** menu).

3 In the report window, click [**Print**], [**Preview**], or [**Export**] to print, preview, or export the selected report.

4 (Optional) You can customize your reports. To customize the report, from the report window, click [**Report Options**] to open the **Report Options** window. In the report options window, you can select which records print, sort the report information, change the fonts or colors, change the page setup, set up headers and footers, or set up a signature block.

Figure 21: The Report Options Window
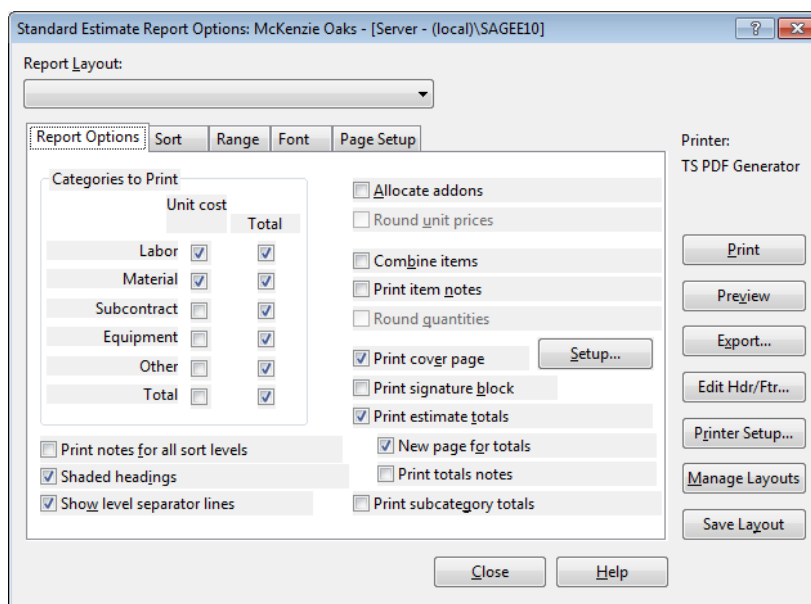
> **NOTE:** For the **Spreadsheet** report, you can click [**Prefill from Spreadsheet**] to change the report options to match the current layout of the spreadsheet. This is an easy way to get a printout that looks the same as the spreadsheet on the screen. If you prefer a different layout for the report, you can change the spreadsheet layout before you print.

5 (Optional) To check the appearance of the report before you print it, click [**Preview**].

6 (Optional) To save your changes for the future, click [**Save Layout**] and give the layout a name. You can select this layout name in the future to use these changes. If you have permissions, you can also share the layout with other Sage Estimating operators.

7 Click [**Print**] to print the report from the **Report Options** window.

To save a report as a file

1 In the report window, click [**Export**].

2 In the **Export Report File** window, select the drive or directory in which you want to save the report. Then enter a name for the report in the **File Name** field.

3 In the **Save As** type field, choose a file format. Your choices are:

- Portable Document Format (*.pdf)
- Microsoft Excel Workbook (*.xls)
- Microsoft Excel XML (*.xml)
- Comma Separated Values (*.csv)
- Tab Separated Values (*.tsv)
- Text Files (*.txt)

4 Click [**Save**].

To preview a report

1 From the **Reports** group of the **Home** tab (or the **Reports** menu in classic view), select the report you want to preview.

2 Click [**Preview**].

3 In the preview window, use the buttons at the top of the window to manipulate the display.

Table 2: Print Preview Buttons

Button	Action
[Print]	Starts printing the report.
[Next Page]	Previews the next page.
[Prev Page]	Previews the previous page.
[One Page]	Shows one page at a time.
[Two Page]	Shows two pages at a time.
[Zoom In]	Makes the pages larger.
[Zoom Out]	Makes the pages smaller.
[Close]	Returns to the previous window.

Chapter 7—Using Address Book

The Address Book is a database of company and personnel contact information. Contacts for Sage Estimating include the subcontractors, clients, engineers, and architects you work with, as well as your own company information.

The Address Book is available in Sage Estimating wherever you need contact information. For example, when you need to assign a subcontractor or a vendor to an item, you can open the Address Book contact selection list from the estimate and select the subcontractor you want to use.

You can perform the following Address Book functions from Sage Estimating:

- Create or edit a company or person contact.
- Select a company.
- Select the client's company (in the estimate settings).
- Select the architect's company (in the estimate settings).
- Select the engineer's company (in the estimate settings.
- Select the default subcontractor or vendor for a material class (**Material Class** window).

Sage Estimating allows for creation of only one Address Book database. If you have multiple existing Address Book databases, combine all your contacts into one database and the migrate your Address Book data using the Estimating Management Console. See the *Installation & Administration Guide* for data migration instructions.

If you do not have existing Address Book data, create a new Address Book database as outlined in the following section.

Creating an Address Book Database

The Sage Estimating installer creates a new Address Book database for you when you install Sage Estimating. Sage Estimating allows you to use only one Address Book database at a time. However, you can migrate existing Address Book databases and select any of them to be the active Address Book database.

You must have at least one active Address Book database. If you inadvertently delete your only Address Book database, the Configuration wizard detects and creates a new one the next time you start Sage Estimating or the Estimating Management Console.

Editing a Contact List

You can edit any of the contact lists in an Address Book database, including **Companies**, **People**, **Regions**, or **Trades**. You can either add a new contact or delete or edit an existing one.

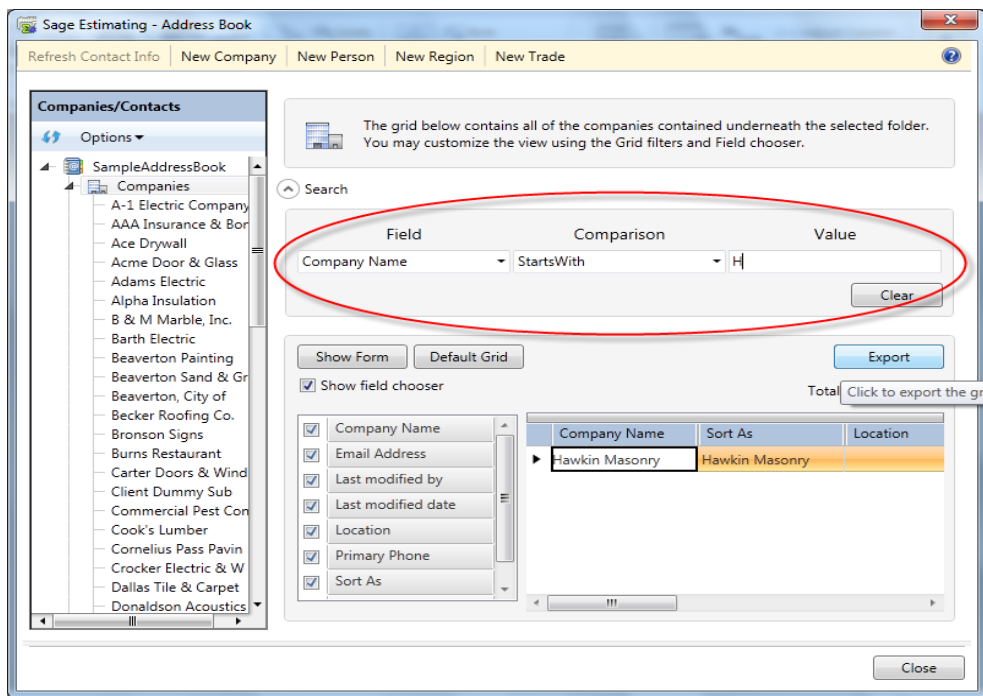### To edit contacts in an Address Book database

1 From Sage Estimating, click on the File menu button [image] and select **Address Book** (in classic view, select **File** menu > **Address Book**).

2 Click on the Address Book database in the **Companies/Contacts** pane to expand the list of contact types.

3 Select the contact type (**Companies**, **People**, **Regions**, or **Trades**) that you want to edit from the **Companies/Contacts** pane.

4 Locate and select the contact you want to edit from the list in the **Companies/Contacts** pane.

If desired, you can select a contact type (**Companies**, **People**, **Regions**, or **Trades**) from the list in the **Companies/Contacts** pane and use the search options in the right-hand pane to locate a specific company or contact.

For example, click **Companies** in the **Companies/Contacts** pane and select **Field**=**Company Name**, **Comparison**=**StartsWith**, and **Value**="H" to see a list of all company names in the selected Address Book database that begin with the letter H.

Figure 22: Searching for Address Book Contacts

5 Edit the contact information as desired.

6 Click [**Save**] to save your changes.

To add contacts to an Address Book database

1 From Sage Estimating, click on the File menu button ▯▾ and select **Address Book** (in classic view, select **File** menu > **Address Book**).

2 Click on the Address Book database in the **Companies/Contacts** pane to expand the list of contact types.

3 At the top of the **Address Book** window, click [**New Company**], [**New Person**], [**New Region**], or [**New Trade**] to create the new contact.

4 Type the contact information in the right-hand pane.

5 Click [**Save**] to save the new contact information.

Chapter 8—Advanced Features

Sage Estimating offers several advanced features. For example:

- WBS (work breakdown structure) codes
- Crews
- Customizable Spreadsheet Sequences
- Subcontractor Bid Grids
- Adjust Spreadsheet Columns
- Move/Copy Items

Using WBS Codes

Sage Estimating lets you define as many as forty work breakdown structure (WBS) codes to provide custom spreadsheet and report sequences. WBS codes let you sort estimate items based on a scheme of your own. For example, you might want to list items by estimator, department, or bid item.

Within each WBS, you create numerous WBS values and assign them to items. After you set up a WBS code and its values, you can assign it to items at takeoff or enter it in the WBS column for items already in the spreadsheet. For example, you can set up a WBS code called **Bid Item** and create multiple values for the code, such as door or window installation. During item or assembly takeoff, **Bid Item** appears in the takeoff grid and the values appear in a drop-down list from which you can choose the one you need.

To set up WBS codes:

1 Click [**WBS Code**] from the **WBS** group of the **Database** tab.

(In classic view, select **Database** menu > **Database Settings**.)

2 In the **WBS** tab of the **Database Settings** window (or the **Database Settings** window if you are using the classic view), enter the information for each type of WBS code you want to create.

Figure 23: Setting Up WBS Codes
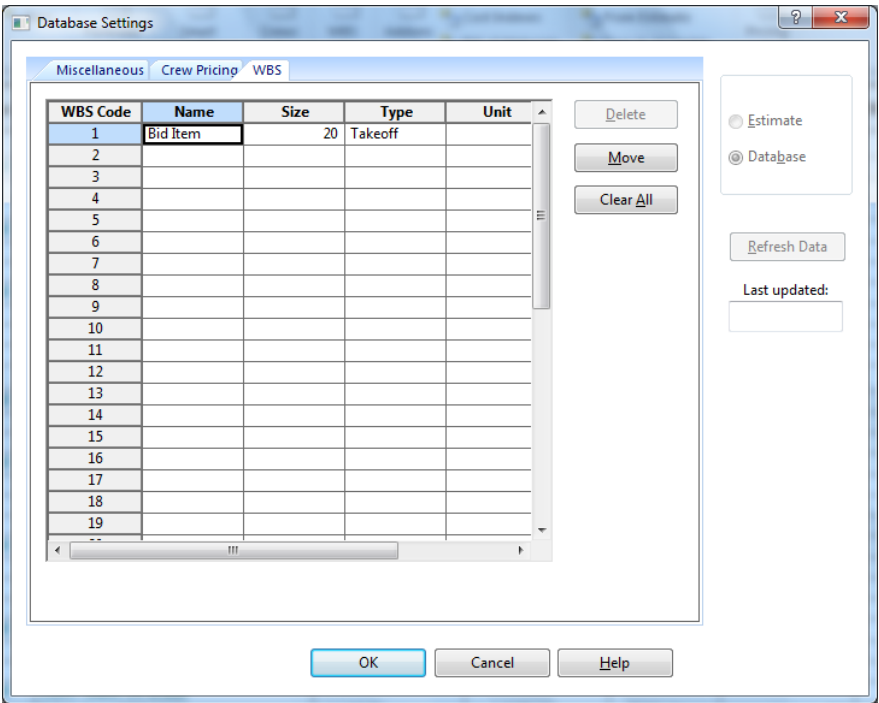
3 In the grid, right-click on a cell and select **Edit WBS Values** from the menu.

4 Complete the fields in the **Adding WBS Value** window. You can use [**Copy**] and [**Prefill**] for this purpose. At a minimum, you need to complete the **Select WBS code** and **WBS Value** fields to enter a new WBS value.

Figure 24: The Database WBS Values Window
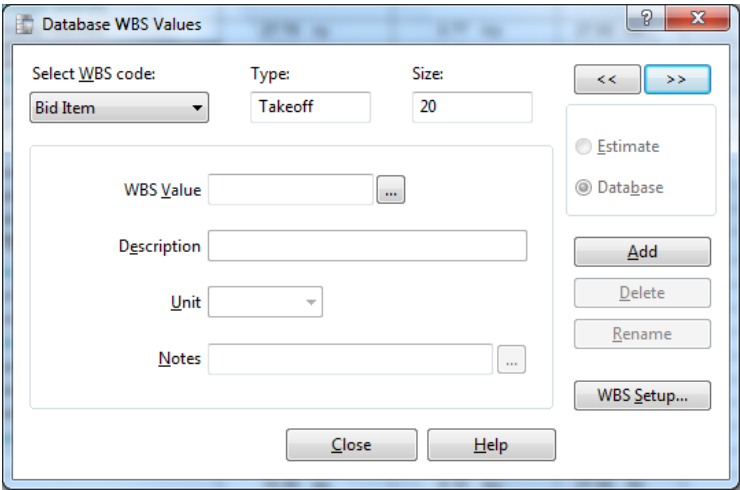
5 Click [**OK**].

Including the Cost of Crews

Crews, which are comprised of the resources necessary to construct an item, let you include the cost of labor and equipment in item prices. Rate tables provide the hourly rates and benefits for each resource used by your crews. You can set up special rate tables to handle local labor rates or overtime pay scales.

For example, a framing crew might consist of two labor resources—a lead carpenter and an apprentice carpenter—each with different hourly wages and benefits stored in a rate table. You assign this crew to your 2x6 stud items and Sage Estimating then includes the cost of that crew when calculating the item price. In the spreadsheet, 2x6 stud items display item prices that include crew costs. Depending on your database settings, the included crew costs are based on the average cost for each person in the crew or on the total cost of the crew.

To set up resources and crews:

1 From the **Crews** group of the **Database** tab, select **Crews** to open the **Database Crew** window.

(In classic view, select **Database** menu > **Crews** > **Crews** to open the **Database Crew** window.)

2 Click [**Add**] to create a new crew.

3 Enter a name and description for the crew.

Figure 25: The Database Crew Window
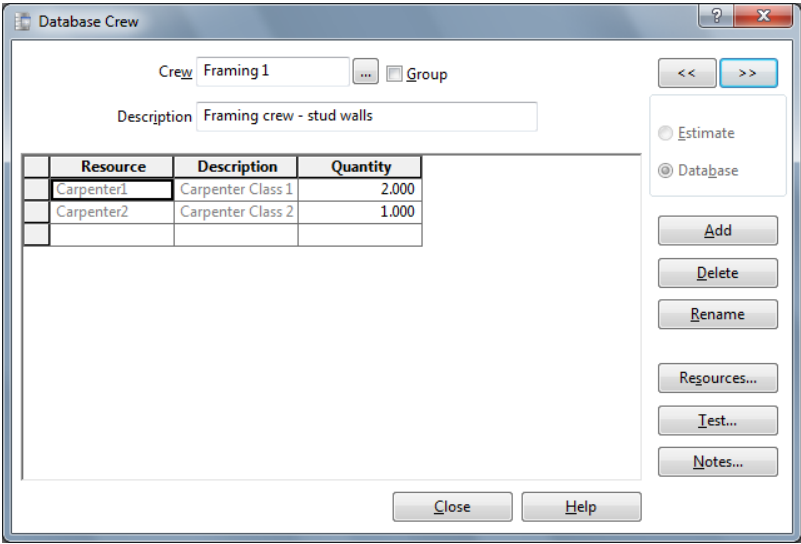
4 To add existing resources to the crew, click [**Resources**] and select the labor and equipment resources that you want to add.

5 To add new resources, right-click in the crew resource grid and select **Create Resource**.

6 Click [**OK**].

Crews and Items

You can set up items with a default crew that comes into the estimate at takeoff, or you can specify crews as you build an estimate. Any changes you make to a crew in the spreadsheet become part of that estimate but have no effect on the standard database.

To assign crews to items in the estimate:

1 Click [**Layout**] in the **Spreadsheet** group of the **Home** tab (or, if you are using classic view, select **Spreadsheet Layout** from the **View** menu).

2 In the **Spreadsheet Layouts** window, select the current layout and then click [**Edit**].

3 In the **Visible** column, select the **Crew** check box.

4 Click [**OK**] twice.

> **NOTE:** To assign the crew to multiple items, use the **Fill Down** feature.

Rate Tables

Sage Estimating lets you specify the rate tables at the standard database, estimate, and item levels. Although most items in an estimate typically use the same labor and equipment rate tables, you can apply a different table to individual items. You can also make changes to an existing rate table in the standard database and then recalculate crew costs in an estimate.

To specify a default rate table for this estimate:

1 Click [**Info**] in the **Estimate** group of the **Home** tab (or, if you are using classic view, select **Estimate Information** from the **Takeoff** menu).

2 On the **Main** tab, enter the rate tables information.

Figure 26: Main Tab of the Estimate Information Window

Spreadsheet Sequences

Sage Estimating lets you organize items in the spreadsheet to suit your specific needs. You can define four additional spreadsheet sequences with as many as ten sort levels each.

After you define them, the sequences appear as tabs at the bottom of the spreadsheet. You can also display the descriptions of the sort levels in the **Spreadsheet Level** column. Sort levels also appear when you print reports, move or copy items, and use the **Find/Goto** command.

As you work, you can change the sequences and sort levels at any time. You can use your favorite sequence as the default for all new estimates that you create.

To define a spreadsheet sequence and specify the sort levels:

1   Click [**Info**] in the **Estimate** group of the **Home** tab (or, if you are using classic view, select **Estimate Information** from the **Takeoff** menu).

2   Click on the **Spreadsheet Sequences** tab.

Figure 27: Spreadsheet Sequences Tab of the Estimate Information Window
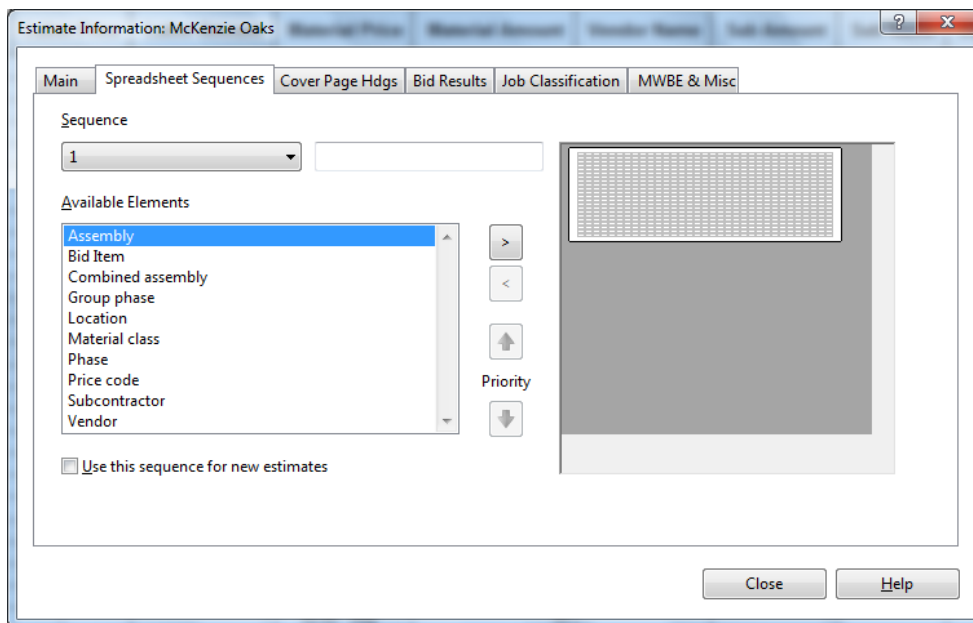
3 Select a sequence number from the list in the **Sequence** box and select a sequence element from the **Available Elements** list.

4 Type a brief description of the sequence in the box to the right of the **Sequence** box (optional).

NOTE: If you leave the description box blank, Sage Estimating creates a description based on the sort levels you select. For example, if you select the **Assembly**, **Subcontractor**, and **Vendor** sort levels, the Sage Estimating creates a description of **Assembly/Subcontractor/Vendor**.

5 Use the buttons in the **Available Elements** area to add and remove the selected sort levels and to move sort levels up and down.

6 Click [**OK**] when you finish defining sequences.

NOTE: Use the **Minimized Overlines** option on the **View** tab (**View** menu in classic view) to see all sequence levels in a single column.

Subcontractor Bids

You can enter bids submitted by various subcontractors for a group of items. After you compare the bids, you can specify the bid that you want to use for the estimate.

To enter subcontractor bids

1 In the **Sub Amount** column, select the items in the estimate covered by the bid.

2 Right-click and select **Open Bid Grid**.

Figure 28: The Bid Grid

3 Use the default name for the bid grid, or enter a more descriptive name of your own.

4 For each bid, enter the subcontractor's name and bid amount. Optionally, you can enter the bid quantity and unit cost to have the bid amount calculated.

5 Right-click on the **Sub Name** cell and select **List Subcontractors** for a list of available subcontractors.

To select a subcontractor bid

1 After you enter information in the bid grid for each subcontractor and compare the amounts, you can select the subcontractor that you want to use for the job.

2 Right-click the name of the subcontractor whose bid you want to use for the estimate and select **Use Subcontractor**.

3 If the included items have labor, material, other, or equipment amounts in the spreadsheet, you have the option of removing or keeping the original category amounts.

- **Clear the labor, material, equipment, and other amounts.** This changes these category amounts to zero.

- **Keep the existing labor, material, equipment, and other amounts.** This changes only the **Sub** amount; amounts in other categories remain unchanged.

4 Click [**Close**].

The selected subcontractor appears in the estimate in the **Sub Name** cell for all items included in the bid.

Adjusting Spreadsheet Columns

You can adjust columns to modify quantities, amounts, and prices for selected cells within a spreadsheet column. For example, if certain portions of a project are duplicated, you can avoid taking the items off a second time by simply adjusting selected takeoff quantities.

You have several ways to adjust selected values: increase or decrease by a percentage, multiply or divide by an amount, replace the current amount with another, add an amount, or spread an amount to each selected cell based on its percentage of the original total. Because you decide when to make the adjustment final, you can safely try various methods until you get the result you want.

To adjust a spreadsheet column

1 In the estimate, select the cells that you want to adjust. You can change cells in any one of the following spreadsheet columns: **Takeoff Quantity**, **Productivity** (labor and equipment categories only), **Price** (all categories), **Amount** (all categories), and **Totals**.

2 Right-click and select **Adjust Column**.

Figure 29: The Adjust Column Window
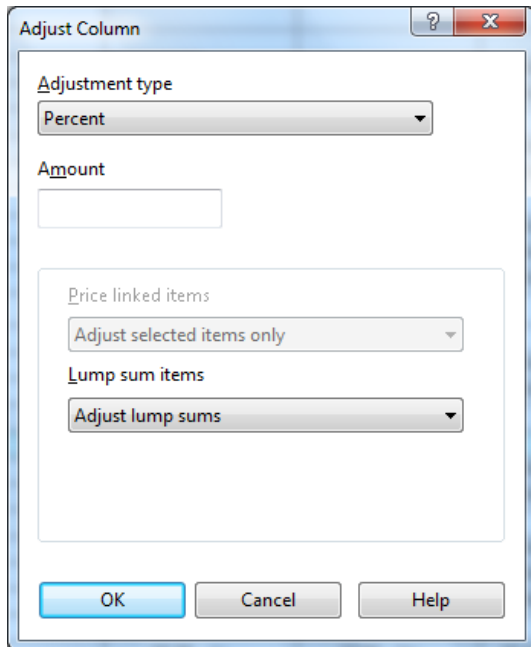
3 Choose an adjustment type and specify the amount to use to recalculate the selected cells. The following adjustment types are available:

- ▫ Percent
- ▫ Multiply
- ▫ Divide
- ▫ Replace
- ▫ Add
- ▫ Spread (available from the **Amount**, **Price**, **Total Amount**, and **Total Cost/Unit** columns only)

4 Click [**OK**].

Sage Estimating applies the adjustment, which is pending, to the selected cells. If necessary, you can use the **Undo** and **Redo** features to reverse or reapply adjustments you make to the spreadsheet.

NOTE: You can also adjust all the items by typing an amount at the overline level, which proportionately spreads the amount to the items beneath the overline.

To finalize an adjustment

1 In the estimate, select the adjustments that you want to finalize. Pending adjustments are marked by a red triangle.

2 Right-click and select **Adjust Column**.

3 Select **Finalize Adjustment** as the **Adjustment Type** and click [**OK**].

After you have finalized productivity adjustments, Sage Estimating removes the red triangle from the selected cells. The spreadsheet adjustments are now permanent and cannot be undone.

Move/Copy Items

You can move or copy items to another spreadsheet level in the estimate when the spreadsheet items are not combined and the current spreadsheet sequence includes one of these levels:

- Work Breakdown Structure (WBS)

- Location

- Subcontractor

- Material Class

- Job Cost Phase

- Unassigned—Items that appear under the **Unassigned** level do not correspond to the current spreadsheet sequence levels. For example, if the current spreadsheet sequence is **Location**, items under the **Unassigned** level do not have a location code assigned to them.

Move/Copy is not available for the first three spreadsheet sort tabs: **Phase/Item**, **Takeoff Order**, or **Assembly**.

Move or copy items, as follows:

1 In the estimate spreadsheet, right-click on the row header and select **Move/Copy** or click [**Move/Copy**] in the **Spreadsheet** group of the **Home** tab.

(If you are using classic view, you can also click [**Move/Copy**] on the spreadsheet toolbar.)

2 The field labels in the window correspond to the current spreadsheet sort sequence. Select the appropriate primary and/or secondary level.

Figure 30: The Move or Copy Items Window
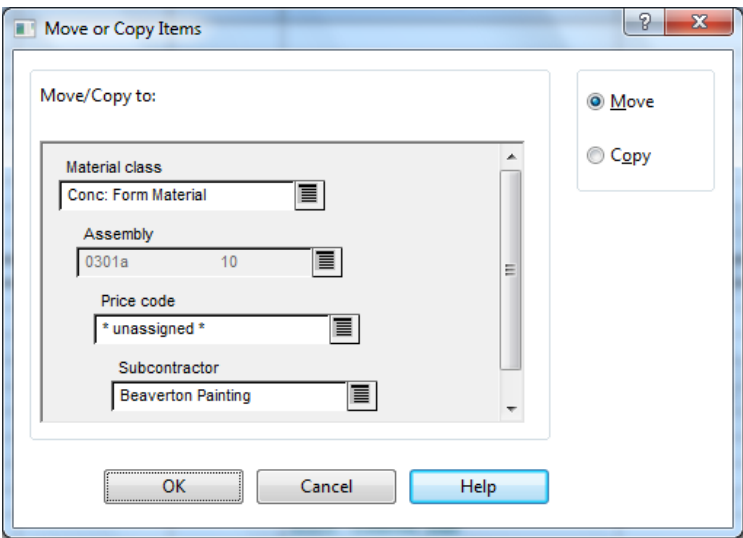
3 Click **Move** or **Copy**, as appropriate.

4 Click [**OK**].

Appendix—Keyboard Shortcuts

Sage Estimating offers many keyboard shortcuts that you can use to access commands. The shortcuts available depend on your cursor placement; some shortcuts are specific to certain windows or spreadsheet columns.

General Shortcuts in Sage Estimating

Table 3: General Keyboard Shortcuts

Shortcut	Result
F1	Displays Help for a field or button.
SHIFT+F1	Displays help for toolbars and screen areas.
F2	Lets you edit the contents of a cell or field.
F4	Opens the Totals window.
CTRL + F4	Closes the active window.
ALT + F4	Closes all Sage Estimating windows.
F7	Scans for the next incomplete cell.
F10	Opens a list.
SHIFT + F10	Opens the shortcut menu.
ALT + F	Displays a drop-down list.
ESC	Ends the field edit without saving your entry.
Underlined letter	Executes a menu command or button when you type ALT and then the letter.

Shortcuts for the Spreadsheet

Table 4: Spreadsheet Keyboard Shortcuts

Shortcut	Result
CTRL + 1	Opens the **One-time Item** window.
CTRL + D	Opens the **Detail** window.
CTRL + E	Goes to the first visible equipment column.
CTRL + I	Lets you edit the selected item in the database.
CTRL + L	Goes to the first visible labor column.
CTRL + M	Goes to the first visible material column.
CTRL + N	Opens the **Notes** window.
CTRL + O	Goes to the first visible other column.
CTRL + P	Lets you edit the selected phase in the database.
CTRL + Q	Goes to the **Takeoff Quantity** column.
CTRL + S	Goes to the first visible subcontractor column.
CTRL + T	Goes to the first visible total column.
F2	Lets you edit a cell.
F3	Finds the next item that matches the current search criteria.
F4	Opens the **Totals** window.
F11	Opens the **Calculator** window.
ESC	Cancels your changes to a cell.
CTRL + PAGE DOWN	Goes to the next spreadsheet sequence tab.
CTRL + PAGE UP	Goes to the previous spreadsheet sequence tab.

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