

## Sage Estimating (SQL)

(formerly Sage Timberline Estimating)

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# Creating Sage Estimating Reports with the SAP Crystal Reports Designer

This booklet describes how to use SAP Crystal Reports® to create a report that will print data for a selected estimate in Sage Estimating.

It assumes that you have a Report Designer role and that you understand how to use Crystal Reports Designer.

#### Overview

You use Report Manager in the Estimating Management Console to create estimate reports based on Crystal Reports designs.

In Report Manager, you specify a Crystal Reports (RPT) file on which to base the estimate report. Report Manager creates a copy of the report design in a custom reports database, and uses this copy for all subsequent modifications to the report. Whenever you edit the report design yet creak it out from the custom reports database. (You do not use the original report design file again.)

Before you can create report designs, you must also use Report Manager to generate report sample data. Report Manager creates tables for the sample data in a separate custum ports database based on one or more representative estimates that you select. You use the tables and the fields contained in this sample database when you set up your Crystal Reports design.



**NOTE:** An Estimates database can contain many estimates with a mix of features, but you print a report for one estimate at a time. Therefore, you need to set up your report designs to extract data from a single estimate.

### Before you start

Before you can create a report design in Chystal Reports, You must

- 1 Create a blank RPT file.
- 2 Generate sample data for the custom reports database.
- 3 Identify the Estimate of a representative estimate that you will use when designing the report.

### Creating a blank Crysta Report (RPT) file

NOTE This step is required only if no other reports exist in Report Manager. If you have existing laborations open the Est nating Management Console, select any report, and then skip to step 4 under "Generating sample data for the custom reports database"

One of the steps in the "Using the Standard Report Creation Wizard to Create an Estimate Report" section requires you to see ec. a blank Crystal Report (RPT) file.

If you do not already have a report file, create one as follows:

- 1 Start SAP Crystal Reports.
- 2 On the Start Page tab, click Blank report.
- 3 In the Database Expert window that appears, click [Cancel].
- 4 On the main menu, click File > Save.
- 5 In the File name text box, type blank.rpt.
- 6 Navigate to an easy-to-access folder.
- 7 Click [Save].
- 8 Exit the program.

You will select this file, later, in the Report Manager.

### Generating sample data for the custom reports dat

Use the Estimating Management Console to create sample data for your poor cosigns:

- 1 Click [Report Manager] on the toolbar.
- 2 Click New Report > Crystal Report.
- 3 In the New Report window:
  - a In the Report box, type a name for the report ou want to create.
  - **b** From the **Filename** box, browse to and select the report deside file (.RPT) that you saved earlier.
  - c Click [OK].
- 4 Select one or more estimates from in glid (lower right-) and pane) to use for sample data, and then click [Generate Data].
- 5 When prompted to select options for the report working data, click OK to accept the default selection.

Report Manager stor is the sample data in a custom reports database, where it is available to use when you are designing reports.

6 Click [Check In]

#### Identifying a representative estimate in the custom reports database

When creating a Crystal Reparts design, you must identify a single estimate that has the characteristics you want to report on. When you run an estimate report, Sage Estimating uses the EstimateId of the estimate displayed at run time. However, when designing the report, you need to supply the EstimateId for a specific estimate that you will use to lay out the report elements.

To find the EstimateId values that are available in the custom reports database, query the values using SQL Management Studio, as follows:

- 1 Start Microsoft SQL Server Management Studio.
- 2 In the Connect to Server window, connect to the SQL database.
  - For Server type, select Database Engine.
  - For Server name, select your Sage Estimating server.
- 3 In the Object Explorer:
  - a Expand the Databases node.
  - **b** Expand the \*ReportDesign\* database.
  - c Expand the **Tables** node.
  - d Right-click the Report. Estimate v1 line on the table.
  - e Click Select top 1000 rows.

The Results tab displays the estimates available in the custom reports or tabase, including the Estimatelds and the names of the estimates.

f Write down the EstimateId for the estimate that you want to work with when you design the report.



### **Using the Standard Report Creation** Wizard to Create an Estimate Report

NOTE: These instructions assume that you are using Crystal Reports 2013 with Support Pack 2. If you use a different version, the workflow may be different.

All of the steps and parameters in this section are required to report on a Sage estimate.

# Step 1: Create a report and connect it to the custom reports SOUTHATE database

- 1 Start Crystal Reports.
- 2 Select File > New > StandardReport.
- 3 Using the Standard Report Creation Wizard:
  - a Expand Create New Connection.
  - b Expand OLE DB (ADO).
- 4 In the OLE DB (ADO)Fields OLEDB Provider window:
  - a Select SQL Server Native Client 10.0.

NOTE: If you are using Microsoft SQL Server 2014, Select SQL Server Native Client 11.0.

- b Click [Next]
- 5 In the OLE DB (ADO) Connection Informal
  - a In the Server field, enter your SQL is stance. For example, enter (local)\SAGE\_ESTIMATING.
  - b Select the Integrated Security sheek box.
  - c For the Database option, select your custom reports database.
  - d Click [Finish] to return to the Standard Report Creation Wizard.

### s you want the report to use

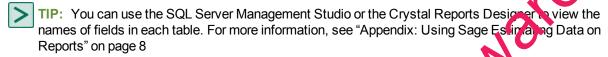


For east of the table, vol can link to a report, see "Appendix: Using Sage Estimating Data on poits on page 8

- the Data tab:
  - a Expand the database node you just added.

- **b** Expand the **Report** schema node.
- c Select the Estimate\_v1 table.
  - **IMPORTANT**: You must select Estimate\_v1 or you will not be able to complete Step 4...
- **d** If you want to include additional tables, select other tables, such as Item\_v1.
- e Click [Next].
- 2 On the Link tab, click [Next].

### Step 3: Select the fields to include in the report



- 1 On the Field tab, select fields (columns from the tables)—for example:
  - Estimate\_v1.Name
  - Item\_v1.PhaseCode
  - Item\_v1.ItemCode
  - Item\_v1.Description
  - Item\_v1.TakeoffQuantity
  - Item\_v1.TakeoffUnitName
- 2 Click [Finish]

You return to the main Crystal Reports window, in preview mode

# Step 4: Set up the Estimateld parameter to target a single estimate



- 1 In the Field Explore pane:
  - a Right click Parameter Fields, and then click New.
  - In the Name field, enter Estimateld.
    - his field is case-ositive.
  - c For the Type op ion, select Number.

- d For the Value Field option, select Estimate\_v1.EstimateId.
- e Click [OK] to return to the preview.
- f With the EstimateId parameter selected, on the Report menu, click Select Expert > Record.
- 2 In the Select Expert Record window:
  - a On the Estimate\_v1.EstimateId tab, in the first drop-down list, select is equal to.
  - **b** In the drop-down list that appears next, select **Estimateld**.
  - c Click [OK].
- 3 In the Enter Values window that appears, type the EstimateId you wrote down for the representative estimate from the custom reports database, and then click [OK].
- 4 On the Report menu, click Refresh Report Data, or press F5.

**NOTE:** If you entered a valid **EstimateId**, preview data appears.

### **Step 5: Save the Crystal report**

- 1 On the main menu:
  - a Click File.
  - b If the Save Data with Report option is selected, cleatit.

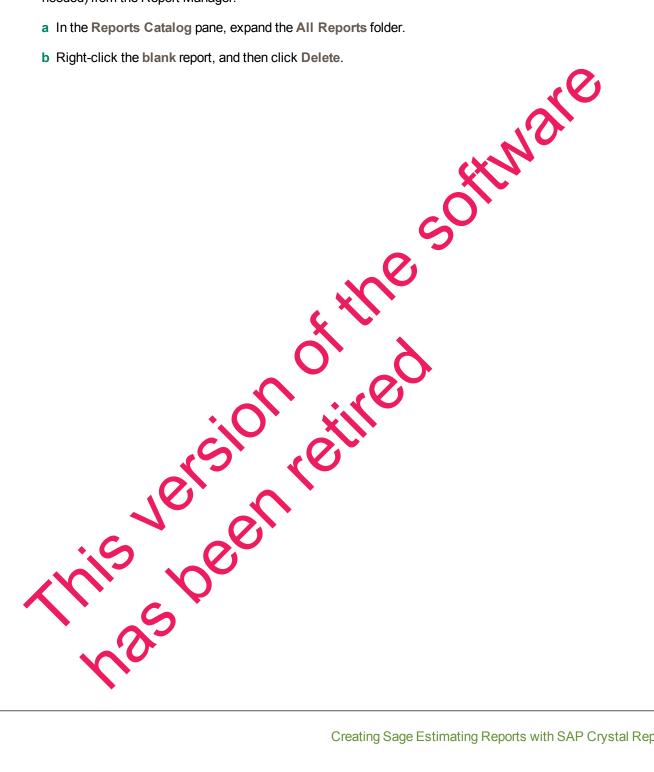


- c Click Save As.
- 2 In the Save As window:
  - a Navigate to an easy-to-find folde
  - b Enter the report file name.
  - c Click [Save]

### Step 6: Add the report to Sage Estimating

- 1 Open the Estimating Managemen. Console.
- 2 On the toolbar, click [Rep at Manager].
- 3 Click New Report Crystal Report.
- 4 In the New Report window:

- a In the Report box, type the name to use for the new report in the Sage Estimating.
- b From the Filename box, browse to and select the new report design file that you saved in "Step 5: Save the Crystal report."
- c Click [OK].
- 5 If this is the first report you have created for Sage Estimating, delete the blank report (which is no longer needed) from the Report Manager:
  - a In the Reports Catalog pane, expand the All Reports folder.



## **Appendix: Using Sage Estimating Data** on Reports

Report Manager can report data from the following tables (in the Report Design database) and views (in the Estimates database):

- Report.Addon\_v1
- Report.AddonBasis\_v1
- Report.Address v1
- Report.Assembly v1
- Report.AssemblyDetail\_v1
- Report.BidGroup\_v1
- Report.CityCostIndex\_v1
- Report.CityCostIndexDetail\_v1
- Report.Company\_v1
- Report.Crew\_v1
- Report.CrewDetail\_v1
- Report.CrewResource\_v1
- Report.Estimate v1
- Report.GroupAssembly v1
- Report.GroupCrew v1
- Report.GroupModel\_v1 (nev\_in\_version 16.11)
- Report.GroupPhase v
- Report.Item v1
- Report.ItemAddonAllocation
- Report It m SValue v
- MaterialClass v
- Report. Model\_v1 (new in version 16.11)
- (new in version 16.11) Report O

- Report.Person\_v1
- Report.Phase\_v1
- Report.ProjectInfo\_v1
- Report.RateTable\_v1
- Report.RateTableColumnHeading\_v1
- RateTableDetail\_v1
- Report.Subcategory\_v1
- Report.SubcontractorBid\_v1
- Report.Unit\_v1
- Report.WbsDefinition\_v1
- Report.WbsValue\_v1

### Viewing table fields

You can use SQL Server Management Studio to view the names of field n each table in the custom reports database.

To view tables and fields (columns) using SQL Server Management Studio:

- 1 Start Microsoft SQL Server Management Studio.
- 2 In the Connect to Server window, connect to the SQL database.
  - For the Server type, select Database ngine
  - For the Server name, select your age Estimating Strver
- 3 In the Object Explorer:
  - a Expand the Databases node
  - b Expand the \*Report Jesign\* database

This custom repeats database is a copy of your data that you use exclusively for creating reports.

- c Expand Lines.
  - We Object Explorer Windo v displays a list of tables from the custom reports database.
- 4 To view a list of the fields available in a table:
  - a Expand the table



**b** Expand the Columns folder.

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