



# **Sage Estimating (SQL) v19.11**

## **On-Screen Takeoff Integration Guide**

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# About the On-Screen Takeoff Integration Guide

If you use On-Screen Takeoff (OST) estimating software, you can set OST to interface with Sage Estimating through the On-Screen Takeoff Integrator. The OST Integrator lets you perform takeoff to estimates in Sage Estimating from drawings you create and store in OST.

**Note:** Integration with On-Screen Takeoff is possible only if you have a license to use ePlan Takeoff.

## Read the Supporting Documentation Before You Begin

This *On-Screen Takeoff Integration Guide* provides installation, setup, and operating instructions for On-Screen Takeoff Integrator . Be sure to read it, as well as the following supporting documentation, before you install and configure Sage Estimating:

- The *Installation and Administration Guide* includes an overview of this release, installation instructions, system requirements, and contact information.
- The *Release Notes* provide details about new features, database changes, known issues, and fixes.
- The *Getting Started Guide* provides an operational overview of the Sage Estimating software.
- 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.

## 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**.
- Names of keys are also shown in bold font. For example: **Enteror Tab**. A plus sign (+) between two key names indicates you should press the keys simultaneously.

## Ways to Get Help

- The names of buttons you can click are shown in bold font and enclosed in brackets. For example: **[OK]** or **[Post]**.
- Variable names or names that are specific to your installation may appear in italics and brackets. For example: [*Drive*]\[*Server*].

## Notes, Tips, and Cautions

**Note:** This style shows that the information supplements the adjacent text.

**Tip:** This style indicates helpful points about using the software.

**Caution!** This style indicates important information to help you avoid a loss of critical data.

**Important!** This style indicates critical information that you need to understand or important steps you need to take.

## Menu Paths

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

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

## Ways to Get Help

Use On-Screen Takeoff Integrator Help or a variety of self-help resources to get answers to your questions. You can also call Customer Support.

## The Help System

With a click of the mouse or a keystroke, you can get Help for a command, a field, a window, or a procedure.

Sage Estimating displays Help in your default browser. If you have an Internet connection, it displays the most current Help for your version of Sage Estimating available from a hosted Help server. If you have no connection (you are working offline), it displays Help that was current when the software was released, and is installed on your computer when you install Sage Estimating.

**Important!** Because the Microsoft Edge browser does not display locally installed help properly, we recommend that you select a different default browser when working offline.

## Ways to Get Help

Use one of these tabs on the navigation pane to begin looking for a topic.

- **Contents** contains Help subjects organized within books.
- Click the **Glossary** heading on the Contents tab to view an alphabetical list of definitions of terms used throughout the Sage Estimating software.
- **Index** contains an alphabetical list of Help subjects.

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

Use the **Search** box to find articles that match the keywords you enter.

# About Integration with Sage Estimating

The On-Screen Takeoff (OST) Integrator lets you perform item and assembly takeoff in Sage Estimating from drawings you create in On-Screen Takeoff.

The OST software organizes parts and materials required for a job into collections known as *conditions*. However, Sage Estimating organizes materials in its databases into individual items and collections called *assemblies*. You must convert or integrate OST conditions into items and assemblies before you can create estimates in Sage Estimating through OST takeoff.

Integration involves three primary steps:

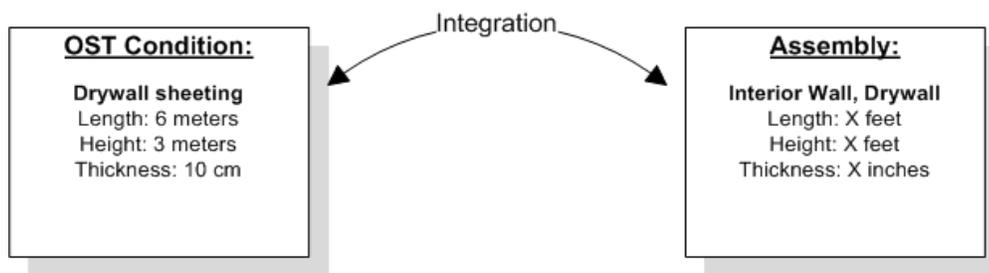
1. Select a condition for takeoff in OST.
2. In the OST Integrator, select a Sage Estimating item or assembly that is comparable to, or the equivalent of, the OST condition.

For example, if you select "Drywall sheeting" for takeoff in OST, find a Sage Estimating item or assembly that most closely matches the selected drywall sheeting.

3. Note the physical properties of the selected OST condition, such as length or height, and type any conversion factors as necessary to equate it with the assigned Sage Estimating item or assembly.

For example, if the drywall board length in OST is measured in meters, and the assigned Sage Estimating item measures length in feet, type the conversion factor required to equate the two.

*Illustration of the Integration Principle*

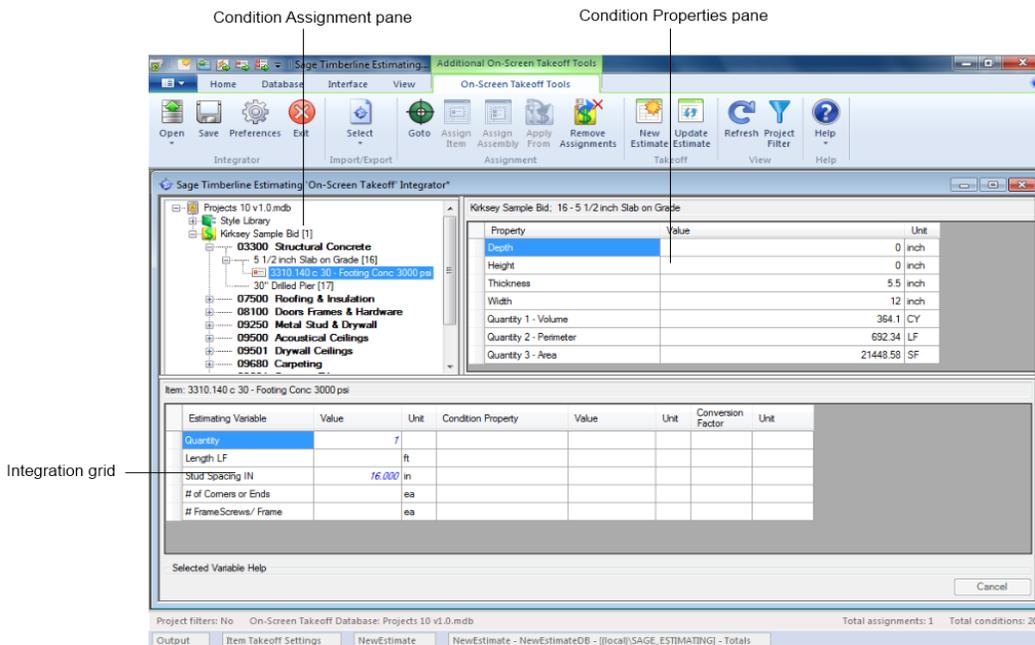


## On-Screen Takeoff Integrator Features

### The On-Screen Takeoff Integrator Main Window

The main window of the On-Screen Takeoff Integrator is divided into three separate panes.

## On-Screen Takeoff Integrator Features



### Condition Assignment Pane

The Condition Assignment pane provides a list from which you can match or assign items or assemblies in Sage Estimating with conditions in an OST database.

For example, if you are working with an OST project or drawing that has a condition for 30 square feet of ceramic floor tile, and the closest equivalent in a Sage Estimating database is the **04-00-10 Masonry, Tile** assembly, select the ceramic floor condition in the list, click the Assign Assembly button , and select the 04-00-10 assembly to assign it to the ceramic floor condition.

Sage Estimating items and assemblies appear in the list beneath the OST conditions to which they are assigned.

### Condition Properties Pane

The Condition Properties pane displays the physical qualities of any OST condition selected in the Condition Assignment pane, such as depth, height, or count (number). You must "map" these properties to their Sage Estimating equivalents in the Integration grid when you assign an item or assembly to an OST condition.

For example, if the selected OST condition has a length of **30 meters** as a physical property or dimension, and the Sage Estimating assembly you assign to it measures length in feet, you must map the OST condition's length (using the Integration grid) to the assigned assembly's length and indicate the conversion factor from meters to feet.

Mapping condition properties enables the OST Integrator to create accurate estimates when performing takeoff from an OST condition.

## Integration Grid

Use the Integration grid to "map" or convert the properties of an OST condition to the variable equivalent of its assigned Sage Estimating item or assembly.

For example, if you are working with a "drywall ceiling" condition from an OST drawing that has a length of 30 meters, and you assign the **09-00-10 Drywall** assembly from Sage Estimating to it, you must ensure the Sage Estimating assembly has a variable equivalent for length in meters.

To begin mapping, select any condition from the Condition Assignment pane that already has a Sage Estimating item or assembly assigned to it. The grid displays the estimating variables and OST condition properties associated with the selected condition.

Refer to the OST Integrator in-product Help for information about specific columns in the grid.

# Performing Integration

## Before you start

Before integrating OST items and conditions with Sage Estimating items and assemblies:

1. Start the OST Integrator from Sage Estimating.

To start the OST Integrator:

- On the ribbon, from the **On-Screen Takeoff** group on the **Advanced** tab,, click **On-Screen Takeoff Integrator** .
- In classic view, click **Interface > Open OST Integrator**.

2. Open an OST database.

You can open either a Microsoft Access-based OST database or a Microsoft® SQL Server®-based OST database for integration. See the OST Integrator Help for more information.

3. Select both the OST database and the Sage Estimating database you want to use for the integration and takeoff processes.

## Integrating OST conditions with Sage Estimating items and assemblies

To integrate OST conditions with Sage Estimating items and assemblies:

1. Select a condition for takeoff in OST.
2. In the OST Integrator, click the **Goto** button  to view the selected condition and its associated items in the Condition Assignment pane of the OST Integrator.
3. In the Condition Assignment pane, expand the OST condition to view any items or assemblies already assigned to it.

**Note:** You can right-click on any condition and select **Expand condition** to expand it.

4. Click the assign item button  to open the **Item List** window or the assign assembly button  to

open the **Assembly List** window.

This window lists all available Sage Estimating items or assemblies in the selected Sage Estimating standard database.

5. Select an item from the list in the **Item List** window or an assembly from the **Assembly List** window and click [OK].

The assigned item or assembly then appears in the **Condition Assignment** pane beneath the condition to which you assigned it.

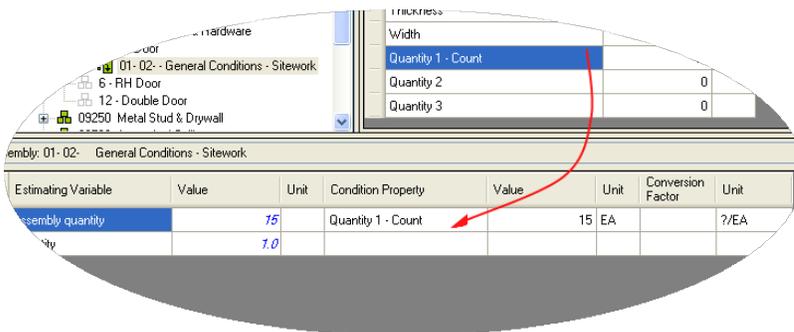
6. The variables associated with the assigned Sage Estimating item or assembly appear in the Integration grid. The properties associated with the selected OST condition appear in the Condition Properties pane. You must "map" or match one or more condition properties to a Sage Estimating variable:

- a. For the first variable listed in the **Estimating Variable** column, select an equivalent condition property from the list in the **Condition Property** column.

For example, if the first Sage Estimating variable is **Width**, select a width-based condition property from the **Condition Property** list.

- b. You can also select a condition property by clicking on a property in the **Property** column of the Condition Properties pane and "dragging" it to the **Condition Property** column of the Integration grid.

### Mapping Properties



If no equivalent condition property is available, leave the **Condition Property** column blank.

- c. If you select a condition property, and a conversion factor is required, type it in the **Conversion Factor** column.

For example, if the Sage Estimating variable **Length** is measured in **Inches** but the condition property **Length** is measured in **Feet**, the conversion factor is 12/1 or 12.

If you did not select an equivalent condition property in step a, specify the Sage Estimating variable's value by typing directly in the **Value** column.

- d. Repeat steps a-c for each Sage Estimating variable in the grid.
7. Repeat steps 1-6 for each OST condition you expect to use during takeoff.
8. Click [**Save**] to save your changes.

## Performing One-Time Integration

You can integrate values from an OST condition property with an item or assembly dimension in Sage Estimating on a one-time basis. You can do this by dragging the OST condition into the dimension grid of the **Item Takeoff** window, **Assembly Takeoff** window, or **Quick Takeoff** window in the Sage Estimating software.

For example, if you are taking off an assembly in Sage Estimating that requires the **Single Ply Roof** condition from OST to be added to it, you can select each associated property **Value** from the **Condition Property** pane in the OST Integrator and "drag" it to the **Assembly Takeoff** window in Sage Estimating. The **Single Ply Roof** condition properties are then added to the assembly.

The Sage Estimating items and assemblies retain the OST condition value integration for one takeoff only. If you want to integrate OST conditions and Sage Estimating items and assemblies for more than one takeoff, you must perform the integration in the OST Integrator using the procedure in "Performing Integration" (page 7).

### To perform a one-time integration with a Sage Estimating estimate:

1. In Sage Estimating, open the **Item Takeoff**, **Assembly Takeoff**, or **Quick Takeoff** window.
2. In the OST Integrator, open the OST project containing the condition or conditions you want to add to the estimate.
3. Select the condition you want to add from the Condition Assignment pane of the OST Integrator.
4. From the Condition Properties pane, select the condition property **Value** that you want to add to the estimate—for example, the values associated with the "width," "height," or "quantity"—and "drag" it to the dimension grid of the **Item Takeoff** window, **Assembly Takeoff** window, or **Quick Takeoff** window in Sage Estimating.

*Selecting a Value for Integration*

Select from this column

Property	Value	Unit
Depth	0	inch
Height	0	inch
Thickness	5.5	inch
Width	12	inch
Quantity 1 - Volume	372.24	CY
Quantity 2 - Perimeter	797.76	LF
Quantity 3 - Area	21928.25	SF

5. Repeat steps 2-4 to integrate all desired OST conditions with the estimate.

## Performing Takeoff to Estimates

After you integrate OST conditions with Sage Estimating items and variables, the OST Integrator allows you to create estimates in Sage Estimating using conditions and items you take off from OST projects.

### To take off OST items and conditions to an estimate:

1. Select an OST project from the list in the Condition Assignment pane.
2. Click the new estimate button to create a new estimate. 

Alternatively, you can open an existing estimate by clicking the update estimate button. 

- **If you are creating a new estimate:** Type a name for the new estimate in the **New Estimate** window; then specify an estimate database for storing it, a standard database to associate with it (optional), and the estimate "branch" where you want it displayed then click **[OK]** to create the new estimate.
- **If you are opening an existing estimate:** Select the existing Sage Estimating estimate from the estimate list then click **[Open]** to open it.

The OST Integrator adds items and assemblies already assigned to conditions in the OST project to the new or existing estimate. If desired, you open the estimate immediately after creating it.

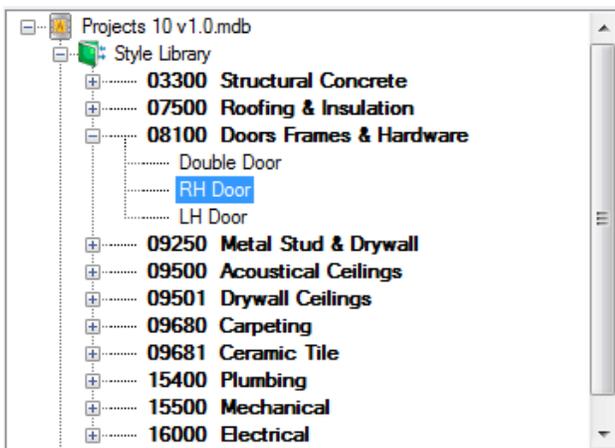
**Note:** For existing estimates only: If you previously generated items and assemblies from the OST project to the selected estimate, the OST Integrator deletes the items and assemblies before adding new ones.

## Using Condition Style Libraries

Using the OST software, you can create a library of condition styles that you can then use in more than one project. A corresponding condition style library appears in the Condition Assignment pane of the OST Integrator.

If, for example, you create a condition in an OST project for right-hand doors called **RH Door**, you can choose to save the condition in the OST style library for use in other projects. In the OST Integrator, the **RH Door** condition automatically appears in the **Style Library** of the Condition Assignment pane.

### *Condition Styles in the Condition Assignment Pane*



After saving conditions as styles in the condition style library, you can assign Sage Estimating items and assemblies to them in the OST Integrator (see "Performing Integration" (page 7) for instructions).

You can then use the integrated condition styles in future projects whenever they are required.

You can create and edit condition style libraries only in On-Screen Takeoff.

**Note:** Each OST database has only one condition style library.

# Importing and Exporting Condition Assignments

You can import and export integrated condition assignments in extensible markup language (XML) files. Use this feature when you want to transfer integrated condition assignments from a Sage Estimating standard database in one location to a standard database in another location.

For example, if you assign OST conditions to Sage Estimating items and assemblies in a standard database on your local computer, and you want to integrate those same assignments into another standard database (such as a shared standard database on a server, for example), export the integrated conditions to file then import them into the shared database.

## To export assignments to a file:

1. In the OST Integrator, open the standard database containing the assignments you want to export.
2. Select **Import/Export** group > **Export the assignments to a file** (in classic view, select **File** > **Export**).
3. Type a file name for the export file in the **File Name** box and browse to the location where you want the file saved.
4. Click [**Save**].

The OST Integrator saves the condition assignments to an XML file (.osti extension) that you can import later.

## To import assignments to a file

1. In the OST Integrator, open the standard database where you want the condition assignments imported.

The target standard database you select must have the same items and assemblies as those in the .osti file or an error results during import.

2. Select **Import/Export** group > **Import an assignments file** (in classic view, select **File** > **Import**).
3. Select the import file containing the assignments you want to import (.osti extension).
4. Click [**Yes**] at the prompt.

The OST Integrator overwrites all current condition assignments in the standard database when you import the assignments from file.

5. Right-click on the OST database in the Condition Assignment pane and select **Change the Database Path**.
6. Browse to the location of the OST database containing the integrated conditions click **[Open]** to update its location relative to the imported condition assignments.

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