Sage Estimating (SQL) v20.1

Means 2021 Integration Guide

August 2021

Contents

About the Means 2021 Integration Guide

The RS Means Integrator enables you to add RS Means item pricing databases to your Sage Estimating software. Using the RS Means Integrator, you can also update your Means price databases on a recurring basis.

Read the Supporting Documentation Before You Begin

This *Means 2021 Integration Guide* provides installation, setup, and operating instructions for Means 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: **Enter** or **Tab**. A plus sign (+) between two key names indicates you should press the keys simultaneously.

- 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: A Note indicates that the information supplements the adjacent text.

	Tip: A Tip indicates helpful points about using the software.

	Caution! A Caution indicates important information to help you avoid a loss of critical data.

	Important! An Important note 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 Sage Estimating Help or a variety of self-help resources to get answers to your questions. You can also call Customer Support.

The Help System

Sage Estimating Help provides more efficient access to 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.

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 from the Sage Estimating Help website. If you have no connection (you are working offline), it displays Help that was current when the software was released and 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 when working offline.

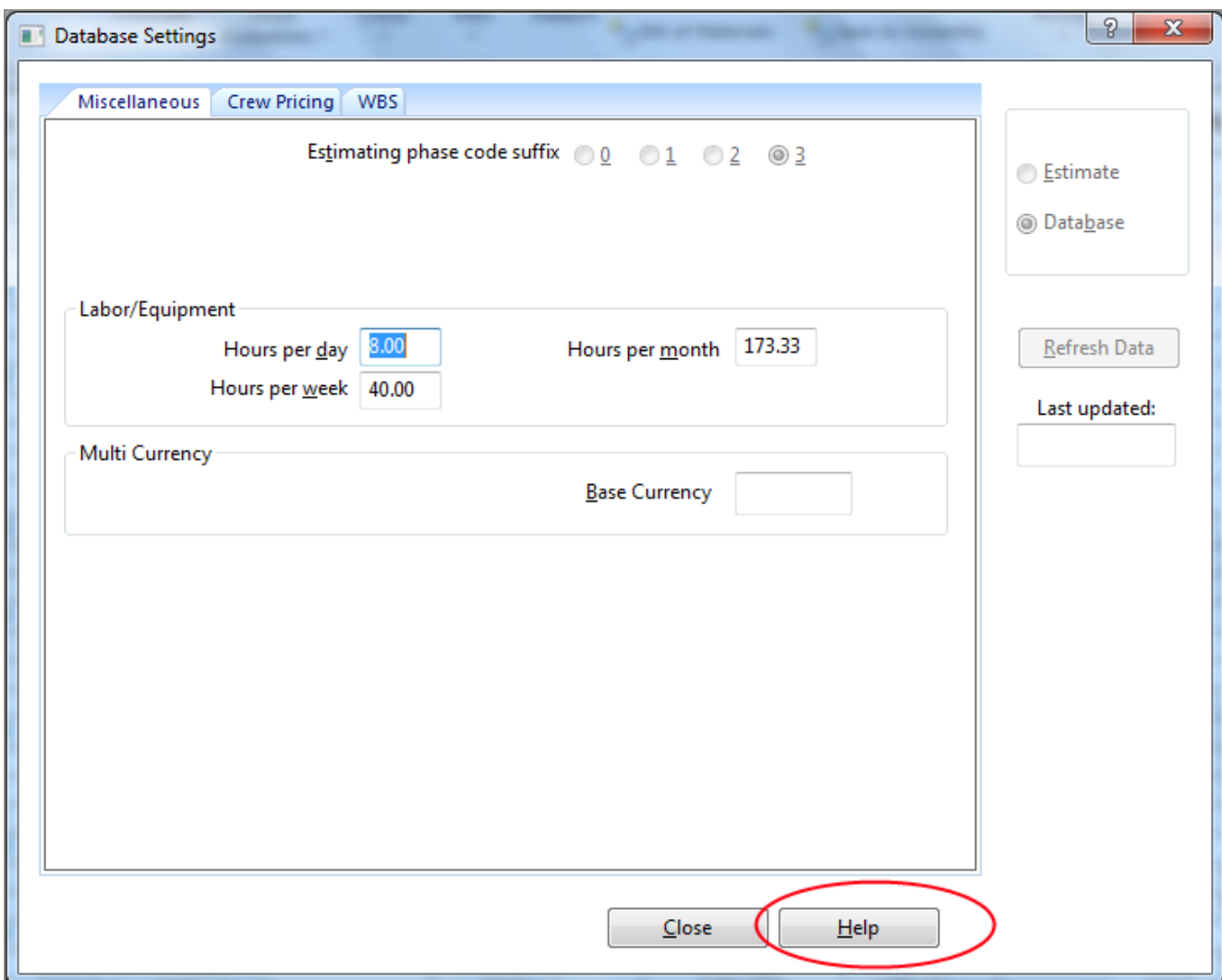### To get Help on a window option

To display Help for an option in a window, 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 then 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.
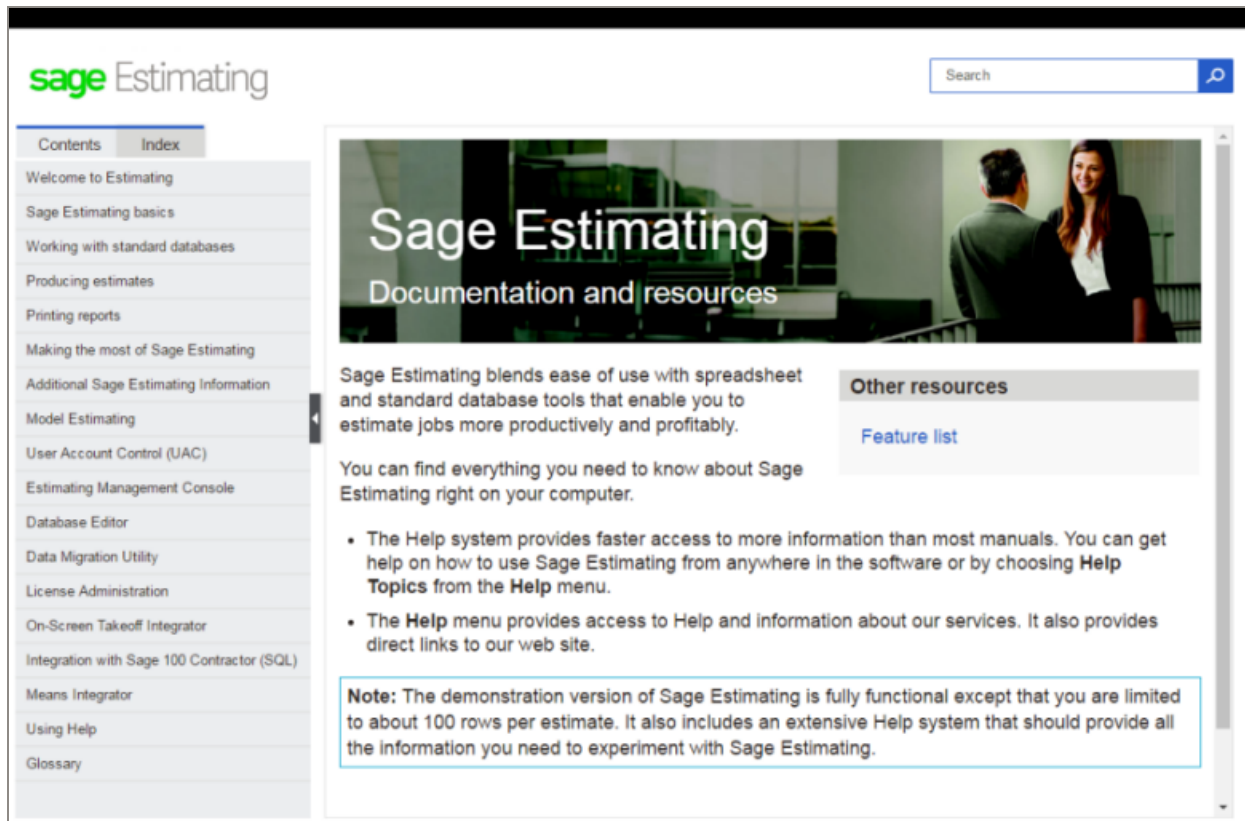
The Window Help Button

To use Help to learn how to do tasks

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

    The Help Window

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

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

    b. Click the **Glossary** heading on the Contents tab to view an alphabetical list of definitions of terms used throughout the Sage Estimating software.

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

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

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

About Means Integrator

Sage Estimating offers Means Integrator cost data files that you can use to create, extend, or update item costs in your Estimating Standard databases with current costs for corresponding items in the RSMeans Cost Data Books. If you use RSMeans cost data in your estimates, read this chapter for instructions on updating the following Estimating Standard databases:

- **Construction Knowledgebase.** The Construction Knowledgebase is a Sage Estimating Standard database that contains Means items and other data. You can use the **Building and Construction Cost Data (BCCD) Means** cost data file to update prices in this database.

- **Residential Knowledgebase.** The Residential Knowledgebase is a Sage Estimating Standard database that contains Means items and other data. You can use the **Residential Cost Data Prices Means** cost data file to update prices in this database.

- Any Estimating Standard databases that were created or extended using Means cost data files.

Overview

The Means Integrator cost data files correspond to the RSMeans Cost Data Books available from Gordian.

With Sage Estimating Means Integrator, you can create or extend Estimating Standard databases with items that match those in the RSMeans Cost Data Books. You can also update prices for your existing Estimating Standard databases that contain RSMeans items.

1. Install or upgrade to Sage Estimating version 21.1 if you do not already have it installed on your computer.

2. Download the 2021 Means cost data files to the workstation or server where you want to store them.

3. Using Windows Explorer, navigate to the folder to which you downloaded the cost data installation files, right-click **DeployDB.exe**, and then click **Run as administrator**.

4. In the **Deploying Means Integrator Cost Data** wizard that appears:

    a. Click **[Accept]**, indicating that you agree to the license terms.

    b. Click **[Browse]**, and then browse to the server or workstation where you want to store your Means Integrator cost data files.

    c. Click **[Install]**.

5. After the installation is finished, start the **Means Integrator**.

    Click **Start > All apps > Sage Estimating 21.1 > Means Integrator**.

6. Follow the steps through the Means Integrator wizard.

Means Integrator Workflows

Integrating your RSMeans Cost Data is a five-step process.

Step One: Prepare Database

In the Means Integrator wizard **Prepare Database** window, you can select whether to transfer data or update data. The following information describes the outcome of these options.

Transfer Data

Select **Transfer Data** if you want to move RSMeans items to a new or existing Sage Estimating database.

- **Transfer Data—New Database**

  Select this option to create a new Sage Estimating Standard database and populate it with all of the RSMeans items.

  > **Note:** You cannot set job cost interface specifications for a new Standard database using this option. You must first create a new Standard database, set up job cost specifications (such as phase suffix and company), and then transfer RSMeans data to the new database using the **Existing Database** option in this window. See the Means Integrator Help for more information.

- **Transfer Data—Existing Database**

  Select this option when you want to transfer the Means items to an existing Sage Estimating Standard database.

  If you select this option, the Means Integrator transfers the RSMeans items directly to the selected Sage Estimating Standard database. The resulting database will contain both your existing phases and items and the RSMeans phases and items.

  > **Note:** Addition of RSMeans phases and items could cause your phase sort to appear differently in Sage Estimating if the RSMeans items have a different phase format than those already in the Standard database.

If you are transferring RSMeans Cost Data to a new database, also select a company to associate with the data, then specify the length of the normal work periods and the default crew pricing method. Sage Estimating displays the specified information in the **Database Settings** window whenever you open the database.

Update Data

Select **Update Data** if you need to update the prices of RSMeans items in an existing Sage Estimating Standard database.

If you want to update RSMeans items in a Standard database created using an earlier version of Sage Estimating (such as Sage Estimating 19.11), ensure you migrate your data to Sage Estimating version 21.1 before performing this update in Means Integrator.

Selecting Means Integrator Cost Data Files

To select the Means Integrator cost data files:

1. Click the [**Browse**] button, and then navigate to the folder where you installed the Means Integrator cost data files.

2. Select the file or files you want to use.

   - You can use the [**Browse**] button again to add files to the selection.

   - Use the [**Remove**] button to remove files from the selection.

   If this is the first time you have used a cost data file, the Means Cost Data File Activation window opens. You will need to enter the activation codes for the file.

3. In the **Means Cost Data File Activation** window (if it appears), type the activation code in the **Activation Code** box.

> **Note:** Items in the Means Integrator cost data files use MasterFormat 2018 (MF18) coding, which is compatible with the previous MF10 and MF04 formats.

Step Two: Select Data

Select the RSMeans divisions and items that you want to update in or transfer to your selected Sage Estimating Standard database.

You can select items and divisions individually or select all available items and divisions at one time.

Step Three: Select Pricing

Select whether to use RSMeans national average pricing for item pricing or base item pricing on a regional cost index.

- If you choose to use the **RSMeans Standard National Average Pricing** option, the Means Integrator uses the RSMeans standard national average as the base price for each item during the integration. The Means Integrator then imports all city cost indexes associated with the RSMeans items so you can use them later with the Sage Estimating **Cost Index** feature.

- If you select the **RSMeans City Cost Index** option, the Means Integrator calculates and sets item pricing based on the region you specify in the **State** and **City** boxes. It does not import any city cost index information for use in Sage Estimating.

Step Four: Select Options

Select a variety of options to apply to the database, including pricing options (**Crew**, **Hourly**, or **Unit**), audit report options, and what to do with any duplicate items.

Step Five: Finish

Review the summary information and click **[Finish]** to transfer or update the selected database with RSMeans information.

You can make changes as necessary by clicking **[Back]** and editing the desired information.