Sage Estimating (SQL) v21.1

Release Notes

January 2023

Contents

Version 21.1 Release Notes

This document provides important information regarding new features and changes in your Sage Estimating 21.1 software. Read these release notes carefully before installing Sage Estimating 21.1.

Installation Notes

System Requirements

For current information about supported operating systems, Internet browsers, Microsoft® SQL Server®, and other software, and about system requirements for servers and client workstations, refer to our Knowledgebase article ID 111616, available at
https://support.na.sage.com/selfservice/viewdocument.do?externalId=111616.

Migration from Estimating (Pervasive) to Versions after v20.1

The migration path from Estimating (Pervasive) to this release is not direct. If you have been using a Pervasive-based version of Sage Estimating, you must:

1. Migrate (transfer) your existing Pervasive-based data to Estimating (SQL) v20.1.

    > **Important!** Sage recommends that you first migrate your data to a test environment to ensure that the migration proceeds smoothly. For example, if there are errors in your Pervasive-based data, you have an opportunity to correct them in that version before migrating the data to a live environment.

2. Upgrade your database from v20.1 to this release.

For information about migrating your Pervasive-based data to Estimating (SQL), see the version 20.1 *Installation and Administration Guide*.

> **Tip:** You can continue to operate v20.1 alongside this current release. If you have a large number of estimates in Estimating (Pervasive, you can migrate them to version 20.1, export them from version 20.1, and then import them later into this version, as needed.

Installing Sage Estimating

Refer to the *Installation and Administration Guide* for complete instructions on installing the software and migrating or upgrading your data.

Before Installing

> **Important!**
>
> - Microsoft .NET 4.8 is required for Estimating. If it is not already installed on your computer, the Estimating installation will require a restart. If you prefer not to restart when installing Estimating, first install .NET 4.8 from the Prerequisites folder (in the Install folder), and then restart your computer before installing Estimating.
>
>   If you receive a message about .NET during installation, stop the installation, restart your computer, and then run the installation program again.
>
> - Sage Estimating (SQL) version 21.1 is compatible only with version 20.4 update 2 of Sage 300 Construction and Real Estate, which Sage plans to release in the fall of 2021. If you integrate Estimating with Sage 300 Construction and Real Estate for Job Cost or Project Management, do not install Sage Estimating (SQL) version 21.1 until you install Sage 300 Construction and Real Estate version 20.4 update 2.
>
> - If you are using third-party software that integrates with Sage Estimating, check with the third-party software vendor to ensure that their software is compatible with version 21.1 before you upgrade to this version.

New Features and Enhancements

Sage Estimating version 21.1 introduces the following significant features:

- Estimating is now a 64-bit solution.

- Throughout the Estimating software and in help, units of labor are now described in a gender-neutral way.

  For example, when selecting settings for reporting labor hours, you choose between **Person hours** and **Crew hours**, and where previously you might have selected Man day, Man Hour, or Man month, now you select **Person day**, **Person hour**, or **Person month**.

- Integration with Sage 300 Construction and Real Estate Job Cost now takes place within Sage Estimating.

  For more information see Improved Integration with Sage Timberline Estimating Job Cost.

- In the Estimating Management Console, you can import an address book that was exported from Sage 300 Construction and Real Estate.

  For more information, see Ability to import a Sage Timberline Estimating address book.

- Estimating removes trailing spaces from WBS values.

- For the Estimating spreadsheet, you can resize the **Insert column** window.

Version 21.1 Is a Modern 64-Bit Solution

Estimating is now a 64-bit solution, which provides a superior ability to handle large databases and process large amounts of data efficiently.

Also, Estimating now supports more recent versions of SQL Server software:

- It comes with SQL Express 2017 (rather than SQL Express 2012).

- It supports SQL Server 2019.

Improved Integration with Sage 300 Construction and Real Estate Job Cost

Because Sage Estimating version 21.1 is now a 64-bit application, it can no longer display Sage 300 Construction and Real Estate windows, which are written for 32-bit Windows. Consequently, Estimating has

had to absorb some of the integrated functions that used to reside in Sage 300 Construction and Real Estate. Most of these functions will be familiar to you, although you could notice the following differences:

- The **Log On** window is simpler, and you cannot use this window to change your password.

- The **Select Company** window is also streamlined. It comprises one dropdown list from which to select a company, and does not include secondary windows where you can specify folders or remove companies from the Company list.

- When exporting to Job Cost:

  - The Job Cost Export Wizard includes a help button.

  - For the final step of the wizard, the button you click is called **Send to JC**, rather than Post to JC.

  - The **Invalid Cost Code** dialog box, displayed if the application encounters an invalid cost code, is simpler. However, there is no option to add the cost code during the export.

  - The **Export to Job Cost Summary** dialog box includes the job number.

- The **Export to Job Cost Validation Report** includes **Extra**, **Cost Code**, and **Category** information.

Ability to import a Sage 300 Construction and Real Estate address book

If your contacts in Accounting are the same in Estimating—for example, an Estimating subcontractor might also be an AP vendor—you can save time by exporting an address book from Sage 300 Construction and Real Estate and importing it into Sage Estimating.

To import an exported address book:

1. In the Estimating Management Console, click [**Address Book**] on the ribbon.

2. In the **Companies/Contacts** pane, on the toolbar, click the **Import Address Book** icon.

3. In the **Import Address Book** window that appears, in the text box, use the Browse button to select the exported address book (an XML file) that you want to import.

4. Click [**OK**].

> **Note:** When you re-import an updated address book into Estimating, only new contact information is updated.

Fixes Since the Previous Version

Version 21.1 includes the following fixes:

- **Spreadsheet:**

  - Addons that use the **Calculate crew items on base rate only** option are calculated properly using the new *crew* base rate.

  - You can open an estimate that includes multiple addons that reference the same parent addon.

  - You can duplicate estimates that have sorted columns.

  - When you edit spreadsheet layouts that have a large number of locked columns, you no longer receive an error message saying there are too many locked columns.

  - Your custom layouts are preserved when you upgrade to version 21.1.

- **Reports:**

  - Item notes in plain text appear properly on custom reports.

  - When you use a range to print an **Estimate report**, the **Estimate Partial Total** field shows the total for the items included in the range. The **Estimate Total** field always shows the grand total, regardless of the range you specify.

  - When you print an **Estimate report** for an estimate that has allocated addons, the signature block shows the correct total, even if you do not print the Totals page.

  - In the **Comparison report** and the **Variance report**, description and phase information is always included even when the compared estimates do not have all same items.

- **Means Integrator:**

  - City cost indexes are updated properly for the **Other** category.

  - The city cost index now includes mappings for **Division 46**.

- **Miscellaneous:**

  - Using the 64-bit Estimating, you can update prices for very large databases.

  - You can reprice an estimate from crews.

  - You can renumber an assembly that is used in a model.

  - When you edit a model, the changes you save to a dropdown list are available immediately.

- When you delete multiple contacts from the **Address Book**, they are removed properly from the tree in the catalog pane.

- You can delete rate tables from standard databases.

- In the **Database Editor** help, we've fixed the example regarding the price code formats to use for Excel.

Revisions to Version 21.1

This section describes enhancements and fixes we have included in revisions to the software since releasing version 21.1.

> **Note:** Each update is cumulative. That is, each successive update includes all the fixes and enhancements provided in previous updates as well as additional fixes and enhancements in the current update.

Update 4 (21.1.2212.161, January 2023)

Fixes

Update 4 includes the following software fix:

- Means Integrator correctly updates database rate tables with new resources available for crew pricing.

Update 3 (Build 21.1.2206.102, June 2022)

Fixes

Update 3 includes the following software fixes:

- When you generate data for custom reports, Estimating fills in Bid Grid and Subcontract information correctly.
- You don't receive an error when you preview and print Crystal reports.
- You can create an item table with a name that exceeds 50 characters.
- You can export to Job Cost even if job cost does not track categories.
- You can integrate Sage Estimating v21 with Sage 100 Contractor v24.1.169.

Update 2 (Build 21.1.2201.141, January 2022)

Fixes

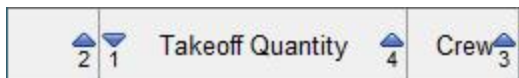Update 2 includes the following software fixes:

- In **Review Assembly**, when you add or replace a pass for an assembly that has a subcategory, the item retains the subcategory.

- When you select a subcategory for an item on the spreadsheet, the item retains the correct subcategory.

Update 1 (Build 21.1.2110.051, October 2021)

Fixes

Update 1 includes the following software fixes:

- When you reprice a crew with the same total price as the original, but different details, Estimating reprices the crew correctly. For example, the original crew might have had one truck for $100, and the repriced crew has two trucks for $50 each. The total equipment price is $100, but the details are different. When you print the **Reprice Crews** report using the **Reprice from Crews** option, the report includes a line indicating that an item was repriced, although the total price appears to be unchanged.

- You can edit an assembly item that has a subcategory even if the item was substituted.

- A PDF explaining how to view Estimating documentation is again available in the installation folder.

- Estimating displays sort order numbers for columns that you have sorted.

- During installation, you no longer receive an error stating that the sqlncli.msi file is missing from your computer.

Known Issues

Problem with migrated standard databases and estimates that used a job cost interface

If you migrated a standard database or an estimate that was integrated with job cost in Estimating (Pervasive), you need to perform a few additional steps to reintegrate the standard database or estimate in Estimating (SQL).

> **Important!** Until you perform the following steps, you will receive a Job Cost Interface Failure error when you try to edit job cost settings for a standard database or an estimate that was integrated with job cost in Estimating (Pervasive). Also, you will not be able to use the standard database with new interfaced estimates in Estimating (SQL).

Before you start

You need to be assigned to a role with Run Management Console, Edit Standard Databases, Edit Standard Database Settings permissions, and have Edit access to the estimates to use the job cost system setup.

For each migrated standard database that used a job cost interface in Estimating (Pervasive):

1. In the **Estimating Management Console**, click **Standard DB** on the ribbon.
2. In the **Standard Database Catalog**, select the migrated standard database.
3. In the details pane to the right, click [**Edit**]
4. In the **Job Cost Information** section:
    a. For the **Job cost system name**, select either **None** or **Text**.
    b. Click [**Save**].
    c. For the **Job cost system name**, select **Sage 300 Construction** or **Sage 100 Contractor**, depending on the application from which you migrated the estimate.
    d. Click [**Setup**], and then enter the job cost settings required to reintegrate the database with Sage 300 Construction and Real Estate or Sage 100 Contractor.
5. Click [**Save**].

6. Repeat steps 2 through 5 for each migrated estimate that used the job cost interface in Estimating (Pervasive).

> **Note:** To edit estimates, you must first click **Estimates** on the ribbon, and then (in step 2) you select the estimate from the Estimate Catalog.

Checking in a Standard Database from the Database Editor Closes the Database for Concurrent Users

You can work on a Standard database in the Estimating Database Editor while other users perform takeoff using the same database in the Sage Estimating program.

When you try to check in the Standard database while other users have the database open, you receive a warning that if you continue to check the file in, there may be unpredictable results for the concurrent users.

If you continue to check the file in despite the warning, the Estimating program stops working for the other users. However, the data is not corrupted and the Estimating program is not damaged.

Need help?

How to Get Help

Get help by:	Recommendation*	To access:
Reviewing in-product help	View information about the current window as well as procedures for using Estimating.	Click the Help button or icon, or press [F1] to display the Help topic for that window.
Reading product documentation	View documents and reference material from the Estimating Product Documents website.	Visit http://cdn.na.sage.com/Docs/en/customer/estimating/Documentation.htm
Searching the Knowledgebase	Search the Sage Knowledgebase, which provides 24/7 access to support articles as well as the latest software downloads and updates.	Visit the Knowledgebase at www.sageKB.com
Asking the community	Join industry peers, certified partners, and Sage pros online 24/7 in Sage City–the best place to ask questions and share product experiences, tips, and tricks.	Visit the General Estimating forum at www.SageCity.com

Get help by:	Recommendation*	To access:
Checking the latest product alerts	Keep up with the latest product information in the Sage City *Announcements, News, and Alerts* forum.	Visit www.SageCity.com
Submitting a web ticket	Submit your issue directly to our support team using Online Case submission.	Visit https://customers.sagenorthamerica.com/irj/portal/anonymous/login
Exploring training options	Learn how to harness the full power of your software through videos and classes at Sage University.	Visit www.SageU.com You can also get access to Sage University from the Estimating File menu by selecting **Help** > **Sage University**.
*Not all options are available for all products. Customer Service hours vary by product line. Access to some resources require an active Sage Business Care support plan.		

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 then select **Help** > **Submit Product Idea**.