

# Sage Estimating



## Product Comparison

The Sage Estimating application is available in two levels: Estimating Standard and Estimating Extended. The following chart describes the key features and capabilities differentiating the two products.

	Standard	Extended
<b>Windows Technology</b>		
64-bit compatibility	●	●
Multiple document interface (MDI)	●	●
Drag-and-drop technology	●	●
Online help (context-sensitive, procedural, and show-me videos)	●	●
Create PDF files of estimate reports	●	●
Email estimates (Microsoft Outlook™)	●	●
<b>Estimate Management</b>		
Explorer estimate management	●	●
Standalone estimates	●	●
Cost index	●	●
Combine assembly features	●	●
<b>Takeoff</b>		
One-time items	●	●
Quick takeoff	●	●
Item takeoff	●	●
Smart Assemblies™	●	●
One-time assemblies	●	●
<ul style="list-style-type: none"> <li>Review mode</li> <li>Reprice estimates</li> </ul>	●	●
Audit trail	●	●
Crews, resources, and rate tables		●
One-time crews		●

	Standard	Extended
<b>Spreadsheet</b>		
Supports multicurrency		●
Disk-based spreadsheet	●	●
Multiple open estimates	●	●
Unlimited number of spreadsheet layouts	●	●
User-defined Work Breakdown Structure (WBS) levels	1	40
WBS library		●
Spreadsheet sequences	5	7
Customizable spreadsheet appearance	●	●
10-level spreadsheet		●
Move/copy		●
Adjust column		●
Specification notes at all levels	●	●
Subcontractors Bid Grid		●
Cuts and adds		●
Detail and Totals windows	●	●
Adjust job totals		●
User-definable markups	●	●
Autoscan for incomplete items	●	●

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	Standard	Extended
<b>Reporting</b>		
WYSIWYG spreadsheet reporting	●	●
Summary and detailed level reporting	●	●
Report sort sequence	●	●
Bill of Materials reporting	●	●
Variance and comparison reporting		●
Control of type styles, sizes, bolding, header/footer	●	●
Allocate indirect costs to direct costs	●	●
Create PDF files of estimate reports	●	●
<b>Database</b>		
Database Builder Wizard	●	●
Electronic price book updating	●	●
Autoadd specialty or one-time items to database	●	●
Database cost categories	5	5
User-definable ways to group items	99	99
User-definable formulas with note options	unlimited	unlimited
Formula variables with min./max. and default	●	●
Advanced markups	999	999
Cost index	●	●
Multiple prices on the item	●	●
Multiple productivity factors on the item	●	●
Secondary item sort	●	●
Indexed search capabilities in item lists	●	●
Merge database models		●

	Standard	Extended
<b>Interfaces and Other Options</b>		
Model Sage Estimating		●
ePlan Takeoff	●	●
Digitizer	●	●
Cut & Fill	●	●
Job Cost	●	●
Project Management	●	●
Scheduling (Microsoft Project and Primavera)	●	●
ODBC compliant	●	●
RS Means and Trade Service	●	●
Buyout	●	●
Industry knowledgebases/databases	●	●

## Estimating Features

### Microsoft Windows Technology

- Compatible with 64-bit and 32-bit operating systems. 64-bit compatibility means it's easier for you to keep up with emerging technologies including the latest hardware.
- Multiple document interface (MDI) lets you open multiple estimates at one time.
- Drag-and-drop technology lets you drag items from a database list or estimate and drop them into your current estimate.
- Extensive online help system—including context sensitive help and index-level help—helps you learn the system quickly.
- PDF files of estimate reports can be created for improved communication and security.
- Estimates can be sent by email using Microsoft Outlook.

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### Estimate Management

- Explorer can help you easily organize, manage, and analyze hundreds of estimates. Locate any budget in your system instantly—whether current or archived—through Explorer's master estimate list. Tools for cross-estimate analysis and bid schedule management are also available.
- Standalone estimates can be created using multiple databases and viewed independently from their corresponding databases.
- Cost index automatically generates or reprices estimates based on the geographic location of the project.
- Combine assembly feature available on sorts and reports simplifies review and analysis of estimates when the same assembly is taken off multiple times.

### Takeoff

- One-time items can be used to add specialty items to the estimate without cluttering up the database. One-time items can also be copied to the database, allowing you to accept or change the proposed item code as well as change other information about the item before you add it.
- Quick takeoff is a fast, easy way to build an estimate. Just drag items from the database directly to the spreadsheet.
- Item takeoff lets you work with a group of items before they are copied to the spreadsheet and allows multiple passes for the same items. You can even save a group of items as an assembly.
- Smart Assemblies takeoff saves time by letting you select all the items of a wall, concrete slab, or other building component in one step.
  - One-time assemblies let you customize the assembly takeoff process on an estimate-by-estimate basis.
  - Review mode gives you an easy way to make adjustments or corrections at any time, before or after accepting the assembly to the spreadsheet.
- Reprice estimates by percent or using database prices to keep estimate prices up to date and in line with your database prices.
- Audit trail provides a detailed breakdown of every item/assembly taken off so you can verify takeoff quantities (including multiple passes), unit prices, amounts, and much more.

- Crews and resources allow you to set up an unlimited number of crews, which can be automatically priced. Rate tables assigned to the estimate determine what labor and equipment prices apply. One-time crews can be set up as you do takeoff. This allows users to fine-tune costs by adjusting labor and equipment resources required for the task.

### Spreadsheet

- If you perform work or source materials and/or equipment outside of the U.S., Sage Estimating allows you to easily convert and display both currencies using spreadsheet layout and manipulation.
- Disk-based spreadsheet eliminates the risk of losing estimate information due to power surges or outages. The spreadsheet resides on your hard drive, so you don't have to remember to keep saving your work.
- Multiple estimates open at once allows you to compare similar estimates on screen and even jump-start new estimates by copying parts and pieces from one estimate to another.
- Unlimited number of spreadsheet layouts can be used to customize the spreadsheet's appearance to meet your special takeoff and reporting needs.
- User-defined Work Breakdown Structure (WBS) codes can be assigned to estimate items, allowing you to organize your estimate in a variety of ways (for example, by bid item, cost code, estimator, and so on).
- WBS library stores preestablished WBS codes for instant retrieval estimate to estimate.
- Spreadsheet sequences give you different views of the estimate. You can view it by phase/item, takeoff sequence, assembly, location/phase and user-defined WBS code (for example, subcontractor, CAD reference, material class, and more).
- Customizing the spreadsheet appearance is possible using different type styles and sizes, bolding, and color highlighting. Changes to column order and column headings are also quickly and easily made.
- Ten-level spreadsheet groups items on the spreadsheet and determines the order in which they appear. Also supported on a number of estimating reports.

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- Move/copy can be used to move or copy items, or a whole section of the estimate, from one area to another. A huge time-saver when estimating work similar to what you've already estimated, like estimating additional floors in a building.
- Adjust column feature provides a way to modify quantities, amounts and prices within a range of marked cells at one time. Adjustments are tracked and can be easily undone.
- Specification notes at all spreadsheet levels let you attach notes to any item, phase, division, assembly, location, and so on. Notes also print on reports.
- Subcontractor bid grid makes it simple to store and select subcontractor bids by item.
- Cuts and adds feature lets you log in one place last-minute price adjustments that can affect many different areas of your estimate.
- Detail and totals windows can be opened directly from the spreadsheet so you can see and edit individual items and estimate information such as subtotals by category, markups, and total cost per unit.
- User-definable markups, such as overhead, profit, bond, and insurance, can be added to each estimate as necessary and customized on an estimate-by-estimate basis.
- Autoscan for incomplete items makes it easy to locate and finalize items in the estimate that are incomplete.
- Estimate overlines enable the display of add-ons, totals, and grand totals at the group, phase, and item levels.
- User-defined Work Breakdown Structure (WBS) codes can be implemented for more personalized spreadsheet views.

### Reporting

- WYSIWYG (what you see is what you get) spreadsheet reporting lets you set up your spreadsheet to look just the way you like it, then print your custom layout as a spreadsheet report.
- Summary and detailed level reports let you determine how much or how little information prints for each report.
- Report sort sequences give you complete control of the order in which report information prints.
- Bill of Materials lets you print material items from the estimate according to material classification.

- Cost variance and cost comparison reports are powerful analysis tools you can use to zero in on the differences between estimates. Estimate comparison can be performed at any level of detail and at a variety of sort options.
- User-defined headers and footers, including text and graphics, can be created for all reports. In addition, complete control of type styles and sizes, bolding, background color, and scaling allows you to customize the appearance of your reports for presentation purposes.
- Option to allocate indirect costs to direct costs can be used to "bury" markup costs in the items to which the markups apply. The estimate's bottom line doesn't change—markups are prorated across appropriate items.
- PDF files of estimate reports can be created for improved communication and security.
- WBS codes enable a more customized reporting system.

### Database

- The time-consuming task of setting up and building a database has been streamlined with the Database Builder Wizard. The Wizard walks you through the necessary steps of structuring and setting up your database more quickly and efficiently, saving you time and money and allowing you to take full advantage of the Sage Estimating software much sooner.
- Electronic price book updating methods can be used to update database prices by category, by user-defined price code, by the cost index feature for prices in a specific geographic location, or from within the Buyout worksheet.
- Specialty or one-time items (item description, waste factor, crew, labor, and so on) can be added to the database from all or part of your estimate.
- The number of categories available on a database item is now five, increased from the previous three. Customers now have a tremendous amount of added flexibility when it comes to pricing out "special" items. One example might be the need to price not only the cost associated with a particularly large piece of equipment but the setup or positioning costs as well as freight charges to get it there.
- 99 user-definable ways (subcategories) to group items and make it possible to print allowances or accumulated costs for special groups of items (for example, owned vs. rented equipment). Totals appear on reports showing total cost, total units and cost per unit.

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- Unlimited number of user-defined formulas with note option lets you build your own formulas using variables and formula tables you define. Each variable can have user-defined help, and each formula can include notes to document assumptions.
- Formula variables allow preset minimum, maximum, and default values to help prevent input errors during takeoff. Each variable can include user-defined help to aid the estimator during takeoff.
- Advanced markups can be used to set up 999 different markups to track anything from bond calculations that include step tables to material sales tax, labor and equipment surcharges, profit, overhead, and more.
- Cost index automatically generates or reprices estimates based on the geographic location of the project.
- Up to twenty price levels may be stored in the database for a single database item. The pricing method can be changed during or after takeoff.
- Up to ten labor productivity factors can be used to determine the labor unit for a single database item.
- Items in the database can be sorted using secondary items. New sort criteria can include WBS code, job cost phase, and more.
- A new method of finding items is now available through an “index search” of the item descriptions.
- Model files can now be merged using similar functionality that applies to other common merged files.
- Digitizer streamlines takeoff of blueprint dimensions and allows you to create a customizable dimension list including the name, quantity and image associated with calculations. Save, store, print or send values to a Sage Estimating spreadsheet automatically.
- Cut & Fill provides quick and accurate earthwork estimates.
- Job Cost for Budget vs. Actual project tracking.
- Price out Change Requests using Sage Estimating and populate item grid on Project Management Change Request screen. Additionally, you can launch Project Management RFI screen from within Sage Estimating.
- From and to estimates—interface options allow you to send estimate information directly to Primavera Microsoft Project and Sage 300 Construction and Real Estate Job Cost. Takeoff values can also be imported from Cut & Fill.
- ODBC lets you link data between applications with different file structures, as long as both applications have an ODBC driver.
- Database pricing can be updated using RS Means and Trade Service pricing information.
- Buyout automates the entire RFQ generation, analysis, and selection process.
- A number of industry databases are available to choose from. Depending upon your specific needs, you choose the database that’s right for you.

### Interfaces and Other Options

- Model Estimating produces conceptual estimates in minutes simply from your responses to a series of straightforward questions about your project. Model Estimating nests related items and assemblies into a single model to simplify the estimating process.
- ePlan Takeoff generates counts and quantity takeoffs directly from On Center’s On-Screen Takeoff® electronic drawings for immediate use in your estimates.

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### Sage Construction and Real Estate

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