

# **Digital Canal Corporation**

## **Solution Papers**

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### **Summary: *Exporting SolidBuilder™ Report to BuildSoft***

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**Overview:** The following procedures below will take you through the steps to export a SolidBuilder estimate or takeoff to be used in conjunction with BuildSoft costing program. This export routine will automatically export the necessary columns to interface with BuildSoft. This solution paper has been created with the help of BuildSoft Technical Support.

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### **Solution:**

#### **Prior to exporting the report**

Prior to exporting the report from SolidBuilder to be used with BuildSoft the workstages in both programs need to be set up in manner so that they will make. The following steps explain how to do this.

There are two ways to import the Estimate Report out of SolidBuilder; both of them involve modifying the workstages. The workstages will need to be modified in either SolidBuilder or BuildSoft.

To modify the workstages in BuildSoft, go to Estimating>Master Databases>Work Stages. Modify the listing in order to match the workstages found in SolidBuilder. The disadvantages of doing the conversion in BuildSoft is loss of the ability to use the 1) prototype jobs, as well as 2) any jobs that have already been created.

To modify the workstages in SolidBuilder, print the Master Work Stage List in BuildSoft (Enhanced Reports>Estimating>Master Work Stage List). Use this report to enter the proper initials and title of the workstages into SolidBuilder. Within SolidBuilder, go under *Database>Items>Items*, highlight the first cell, click on Field Values, click on the drop-down arrow and select WorkStage.

#### **To export the report from SolidBuilder:**

Before the report can be export from SolidBuilder for use with BuildSoft the estimate report must be created. For more information on creating a SolidBuilder report please refer to the SolidBuilder reference manual.

1. Switch to production mode if you are currently in Model mode or Working Drawing Mode
2. Click the quantities icon, and then click the options icon. Within the options make sure that within the create section that estimate is toggled on. Under the estimate options button make sure that you have the desired options selected for the information that you wanted included within your report. Once this is all completed click the OK button within the report options.
3. Now make sure that the drop down list has report listed and click the hammer to generate the report. First you will get the check notes which you can close, and the estimate report which you can close.

Now that the necessary SolidBuilder reports have been generated the following steps will walk you through the process to export the report to BuildSoft

4. Within the quantities mode change the drop down list from reports to Export Report. Once you have done this the Export Report dialog box will appear.
5. Toggle on BuildSoft – this is the type of report you will want to export, and select OK
6. Then you will be prompted with another export report dialog that prompts you for a file name. Enter the desired name that you would like the report to be created as. This name will be the name of the report

that will be stored on your hard drive and the also the report that will be imported into BuildSoft. Once you have specified a name click the OK button.

7. Now you are prompted with a reports dialog box with all the different reports that have been previously created within SolidBuilder. You will need to find the report that was previously create (it will have the name of the model as the report name). Once you have found that report you will want to either highlight the estimate or the take off as the report you want to export. Then click OK. This is why the estimate report must first be created prior to exporting the report to BuildSoft.
8. Once that is completed the exported report will be displayed in a notepad format. You can just close this window and the export report process is complete.

#### **Importing the SolidBuilder report into BuildSoft:**

9. Inside BuildSoft, go under Estimating>Other Takeoff Packages>Solid Builder. Select the job the import is for then click OK.
10. Enter the drive and path where SolidBuilder is loaded, as well as entering “\sbbom” after the SolidBuilder path. The last part entered is the file name. For example, “d:\sbwin\sbbom\export.bst” would be entered into the path field. Click OK.
11. Then a BuildSoft warning dialog will appear – you can click yes at this dialog box for the import to begin.
12. If there are any material items with no workstages attached, another dialog box will appear. There are two ways that this dialog can be handled which are listed below.

Two ways to handle this: 1) go back into SolidBuilder and attach workstages to any material items missed by generating a new report and attaching the workstages again (recommended) or 2) edit the exported report in Notepad or Wordpad and add the missing workstages.

Another error encountered could be that a workstage was used on the estimate that is not in BuildSoft's job schedule. Either add it to the job schedule or reproduce a new Estimate Report in SolidBuilder without using that particular workstage. Once the Estimate Report is imported into BuildSoft, edit the material list to attach vendor, change prices, etc. Note: the prices can not be updated from the vendor record because the material item number from BuildSoft is not part of the export/import process from SolidBuilder, so there is no connection between the material in the material list and the material in the vendor record.