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DATA TRANSFER GUIDE VERSION 4.1N TO VERSION 5

Greetings valued TSI customers,

The following documentation is for bringing your existing information from Tradesmen's Master Estimator Version 4 to Tradesmen's On-Screen 3D Estimator Version 5. There is not a data conversion as there are new files in V5 that do not exist in V4. Data from V4.1N Screen D-2 (Corners/Jambs), D-13 (Rebar) and D-14 (Control Joints) do NOT have a place in V5. In V5, these are now Scheduled Items. Your favorite wall assemblies may be utilized, but some of the data will need to be re-created. Information such as Standard Labor, Crews and Materials will easily transfer from V4 to V5.

There will not be any backwards compatibility from V5 to V4. **You will want to complete any current projects that you are working on in V4 before you bring any data into V5. You will also want to perform this procedure before you begin any new projects in V5, as it will overwrite the ship data and new data you may have created.**

Please complete a backup of your Estimate folder (Default location C:/TSI/Estimate) before you begin any of the following procedures. A backup can be completed by simply "Copying" the Estimate folder and "Pasting" it to a secure location, such as a USB drive or an external hard drive. **If you are unsure of how to complete any of the following procedures or do not have the required computer knowledge to complete, please request the appropriate IT personnel from your company to assist you.**

We do recommend that you clean up your existing V4 data set prior to bringing your existing data/projects into V5. **NOTE: The procedure for data clean-up is not a requirement. This process is only recommended if you have been using our software for years and have accumulated 750 or more projects.** Your old or unused projects can be mass exported to an external drive or server location using the Archive Project feature in the Utilities. Your projects are being deleted/removed from the data set, but **they are not being deleted forever.** You may import any of the individual projects again at any time if needed. We recommend that you export only one or a few old projects first for proof of concept, so that you may see what is happening before you do the mass export.

PROCEDURE FOR EXISTING VERSION 4 PROJECT DATA CLEAN UP

1. Create “Old_TSI_Projects” folder on an external drive or server location.
2. Open **Bw4Utils** from V4 Master Estimator. Right click on the existing V4 icon and then left click on “Open file location”. Locate the **Bw4Utils** file and double click on it.



3. Click on “Maintenance” and then click on “Archive Projects”.



4. Set “Export to Folder” to location created in step #1.
5. If you have “Project Cost Codes” select “All”.
6. You can “Leave out On-Screen Blueprints”, but you may wish to consider keeping them with the project. We suggest you leave this unchecked.
7. Set “Costs” to “Export all costs”.



8. The top window will list ALL of your projects in the data set. The total number of “Projects in the data set” is listed in the [square brackets].

[30] Projects in the data set

Description	Job No.	Bid Date	Last Touched	Hidden
Test for Joel		1/19/2016	1/19/2016	
Show Demo Project		1/20/2009	1/19/2016	
(Y)ACOM - REVISION-4		6/27/2012	1/07/2016	
(Y)Willowgrove School/Catholic School		5/30/2012	1/07/2016	
(Y)ST JOHN CANTIUS		11/21/2013	1/07/2016	
(Y)McMillon HS Plano ISD	10-014	1/25/2010	1/07/2016	

9. To keep your most current projects, you may select either “Bid Date” or “Last Touched” and then select a date in which all projects before that date are archived. The total number of “Projects T Be Exported” is listed in the [square brackets].

10. Select “Successfully Exported Projects Should Be” “Deleted”.

Export Projects Matching these conditions Job Number Is not blank **Bid Date** is before Last Touched is before Hidden

[11] Projects To Be Exported 1/01/01 1/01/01

Description	Job No.	Bid Date	Last Touched	Hidden	Archive Information
Pier Project		12/19/1999	5/09/2015		
Automotive Parts Co		6/23/2000	1/19/2012		
Home \ CMU Foundation		10/30/2000	9/07/2007		
Assemblies-School		1/10/1997	3/15/2006		
Retaining Wall System		2/27/1996	3/15/2006		
Lockport High School Wall		1/06/1996	3/15/2006		
Assemblies-Florida Home		12/19/1997	3/15/2006		
Assemblies - Splitface		1/30/1998	3/15/2006		
Assemblies - Fireplace		12/17/1997	3/15/2006		
Assemblies - Australia		2/15/1999	3/15/2006		
Assemblies-Brick Veneer House		1/05/1995	3/15/2006		

< Press Start - Export >

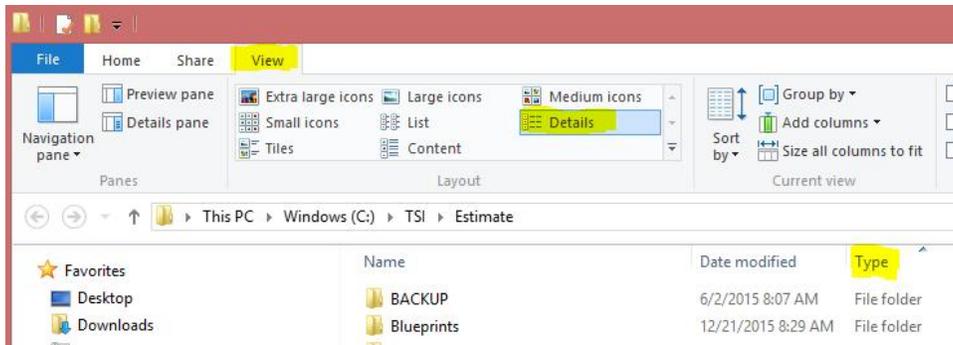
Successfully Exported Projects Should Be Deleted

11. Click on “Start-Export”.

PROCEDURE FOR COPYING EXISTING PROJECTS/DATA FROM VERSION 4 TO VERSION 5

Please make sure you have backed-up your data before beginning the following procedures.

1. Right click on your Version 4 icon and then do a left click on “Open file location”.
2. You will want to organize the program files for easier access. Your screen may not match the exact look of the image provided below, because not all versions of Windows™ is the same. Click on “View” at the top of your screen and then select “Details”. Next, click on the “Type” column.



3. Scroll down to .TPS files. The files will be listed alphabetically “Adjust.TPS” through “Walls.TPS”.
4. Left click on “Adjust.TPS” to highlight it.
5. Scroll down to “Walls.TPS”. Hold down the SHIFT key and left click on “Walls.TPS”. All of the .TPS files should now be highlighted.

Name	Date modified	Type	Size
Kpm__dm.tps	3/1/2000 3:20 PM	TPS File	5 KB
Scales.tps	12/21/2015 8:29 AM	TPS File	2 KB
Sheetml.tps	1/28/2016 11:00 AM	TPS File	2 KB
Sheets.tps	1/28/2016 11:00 AM	TPS File	4 KB
Slctdmat.tps	1/28/2016 11:00 AM	TPS File	299 KB
Vertical.tps	1/28/2016 11:00 AM	TPS File	2 KB
VertMat.tps	1/28/2016 11:00 AM	TPS File	2 KB
VertPlacement.tps	1/28/2016 11:00 AM	TPS File	2 KB
VertWythe.tps	1/28/2016 11:00 AM	TPS File	2 KB
Wall.TPS	1/28/2016 11:00 AM	TPS File	477 KB

6. Right click on the highlighted area and left click on “Copy”.
7. Navigate to V5 shipping data location. Default location is “C:TSI\OS3DE\Data”.
8. Right click on “Data” folder and the left click on “Paste”. You will choose to replace the existing files when prompted. You are overwriting our shipping data with your data.