

Sage Timberline Office

Upgrade Guide

MyAssistant 9.7.1



NOTICE

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Upgrade Guide

Read the Following Information Before You Upgrade

This document steps you through the upgrade and configuration of the Sage Timberline Office MyAssistant software. This process consists of the following steps.

1. Upgrade the MyAssistant Server software.
2. Reactivate the MyAssistant Server software by stepping through the MyAssistant Configuration Wizard.
3. Upgrade MyAssistant on the desktop computers or Terminal/Citrix Servers where MyAssistant is used.
4. Depending on a number of settings, you may be asked to reactivate the software on the workstation(s).

Upgrading and configuring the MyAssistant server should take approximately 30 minutes. Upgrading each MyAssistant workstation should take approximately 10 minutes.



CAUTION: Only upgrade to MyAssistant 9.7.1 if you are currently running MyAssistant versions 4.0, 4.1, 4.2, or 9.7.0. If you are running an older version (Ex. 3.0) you must upgrade to 4.2 and *then* move to 9.7.1.

If you upgrade from an older version than 4.0 you risk corrupting all of your MyAssistant data.

Conventions Used in this Document

This document uses the following conventions:

- The names of screens, windows, fields, and other features displayed by the software are shown in **bold type**.
- Information you enter into the software is in bold type, as in the following example: Enter **Miscellaneous** in the **Amount Type** box.
- Names of keys are shown in capitals; for example, ENTER, TAB. A plus sign (+) between two key names indicates that you should press both keys at the same time; for example, SHIFT + TAB.
- The names of buttons you can click with your mouse are enclosed in bold type; for example, **[OK]** and **[Post]**.



TIP: Helpful information to make your experience better.



NOTE: This symbol draws your attention to information of particular interest, such as information not included in steps.



CAUTION: This symbol draws your attention to information that is important because it can help you avoid a costly or time-consuming error.



IMPORTANT: This symbol draws your attention to information that is of critical importance.

Before You Begin

- Determine the computer where the MyAssistant server software is currently installed. It is most likely on your Timberline server.
- Ensure the latest Microsoft Windows and Microsoft Office updates have been installed. Installing the High Priority updates is recommended.
- Get your MyAssistant Server Product Key and your Customer Number.



TIP: Restart the MyAssistant Server within a few days of performing the upgrade. This will complete any Windows or other software updates where a restart is required.

- Sage Timberline Office MyAssistant will upgrade the following:
 - Sage Timberline Office MyAssistant software
 - Your MyAssistant Tasks and Notifications in your MyAssistant Database
 - Microsoft SQL Server 2008 Express Edition (Server Only)
 - Crystal Reports runtime components

Support and Training

Sage Customer Support Call Center

Telephone Support

When you have a more urgent question or would prefer to speak to a customer support analyst directly, call us at 800-551-8307. Telephone support is available Monday through Friday from 6 a.m. to 5 p.m.

Pacific Time with the following exceptions:

- Every Thursday from 2 p.m. to 3 p.m. Pacific time (closed for customer support staff meetings)
- Standard United States holidays
- Quarterly company meetings

Training

Please contact Sage Customer Support to review the available training options.

Chapter 1 – Backup the MyAssistant Database

Before upgrading your MyAssistant software, it is important that you backup your current MyAssistant database. If you have Microsoft SQL Server Management Studio installed on your MyAssistant Server, use it to back up the MyAssistant database (Notification). If you do not have Microsoft SQL Server Management Studio installed, you can use the following to create a backup of your MyAssistant database.

Please follow the steps below to backup your database.

1. Log onto your MyAssistant server as a user with administrator privileges.
2. Create a folder on the C drive of the machine. (Ex. MyAssistant Database Backup)
3. Open the command window on the machine.
 1. Open your Windows Start menu.
 2. Click [Run]
 3. Type: **cmd**
 4. Hit ENTER on your keyboard.
4. Type: **SQLCMD -E -S .\isd**
5. Hit ENTER on your keyboard. **1>** will appear on the next line.

```

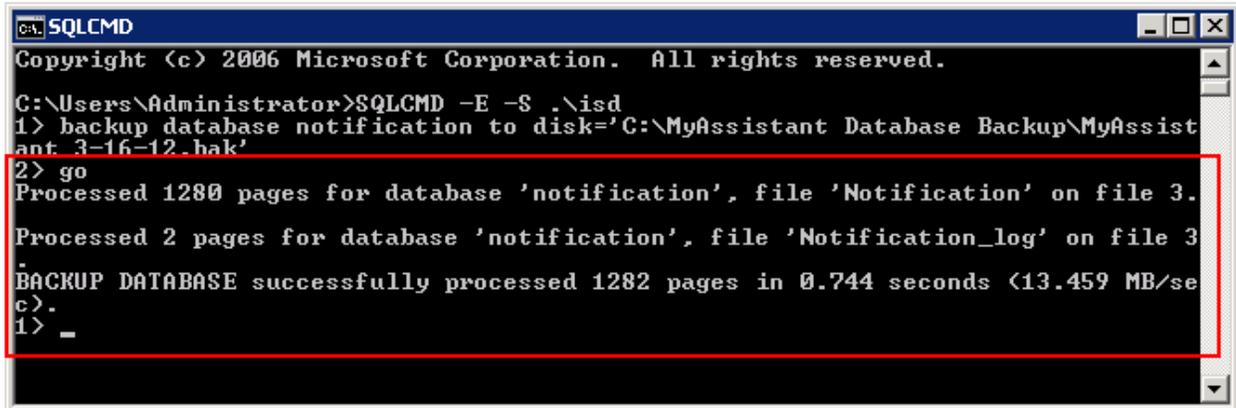
C:\Users\Administrator>SQLCMD -E -S .\isd
1> _
  
```

6. Type: **backup database notification to disk='C:[Folder Name]\[File Name].bak'**
 Ex. **Backup database notification to disk='C:\MyAssistant Database Backup\MyAssistant 3-16-12.bak'**
7. Hit ENTER on your keyboard.
8. If step 6 was typed correctly, **2>** will appear in the next line.

```

C:\Users\Administrator>SQLCMD -E -S .\isd
1> backup database notification to disk='C:\MyAssistant Database Backup\MyAssistant 3-16-12.bak'
2> _
  
```

9. Type: **go**
10. Hit ENTER on your keyboard.
11. There will be a pause while your database is backing up. Depending on the size of your database, the backup can take 2-3 minutes. Nothing will be happening on screen during this time.
12. When the database has backed up successfully, you will see a message in the command window confirming the backup.
13. **1>** will appear in the next line.

A screenshot of a Windows command prompt window titled "SQLCMD". The window shows the following text: "Copyright (c) 2006 Microsoft Corporation. All rights reserved." followed by the command "C:\Users\Administrator>SQLCMD -E -S .\isd". The user enters "1> backup database notification to disk='C:\MyAssistant Database Backup\MyAssistant_3-16-12.bak'", then "2> go". The output shows "Processed 1280 pages for database 'notification', file 'Notification' on file 3." and "Processed 2 pages for database 'notification', file 'Notification_log' on file 3". The final output is "BACKUP DATABASE successfully processed 1282 pages in 0.744 seconds (13.459 MB/sec)". The prompt "1> _" is visible at the bottom. A red rectangular box highlights the output text from the "Processed 1280 pages" line down to the "1> _" line.

```
SQLCMD
Copyright (c) 2006 Microsoft Corporation. All rights reserved.

C:\Users\Administrator>SQLCMD -E -S .\isd
1> backup database notification to disk='C:\MyAssistant Database Backup\MyAssistant_3-16-12.bak'
2> go
Processed 1280 pages for database 'notification', file 'Notification' on file 3.
Processed 2 pages for database 'notification', file 'Notification_log' on file 3
BACKUP DATABASE successfully processed 1282 pages in 0.744 seconds (13.459 MB/sec)
1> _
```

14. Type: **Exit**
15. Hit ENTER on your keyboard.
16. Close the command window.
17. Look in the folder created to ensure the **.bak** file was saved to the correct place.

Now that your MyAssistant database has successfully been backed up, continue with the upgrade of your MyAssistant software.

Chapter 2 – Uninstall the MyAssistant Sage Desktop Plugin

If you are upgrading from version 4.0, 4.1, or 4.2 you need to uninstall the MyAssistant Sage Desktop Plugin prior to upgrading.

This needs to be done on each machine prior to upgrading that machine. Please follow the instructions below to uninstall the Sage desktop plugin.

1. Open the control panel on the machine
 - Start > Settings > Control Panel
2. Open **Add\Remove Programs** or **Programs and Features**
3. Look down the list of installed programs to find **MyAssistant Desktop Pulgin**
4. Select the item and click **Remove** or **Uninstall**
5. When the Desktop plugin has uninstalled successfully, continue with the upgrade.

Perform the steps above on the MyAssistant Server and each MyAssistant Workstation.

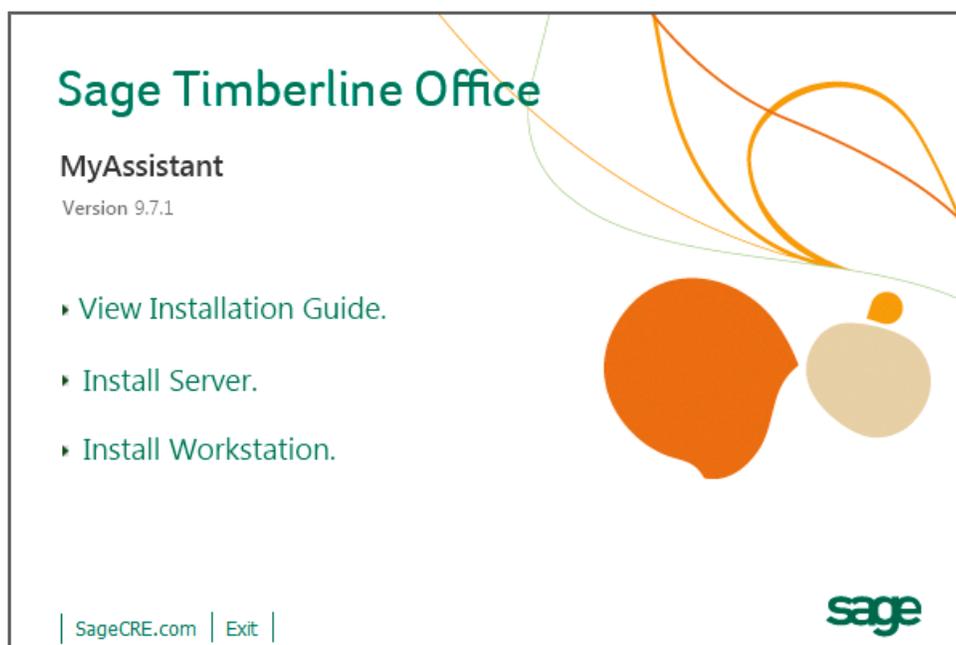
Chapter 3 – Upgrading the MyAssistant Server



CAUTION: Only upgrade to MyAssistant 9.7.1 if you are currently running MyAssistant versions 4.0, 4.1, 4.2, or 9.7.0. If you are running an older version (Ex. 3.0) you must upgrade to 4.2 and *then* move to 9.7.1. If you upgrade from an older version than 4.0 you risk corrupting all of your MyAssistant data.

Perform the following to initiate the MyAssistant Server upgrade.

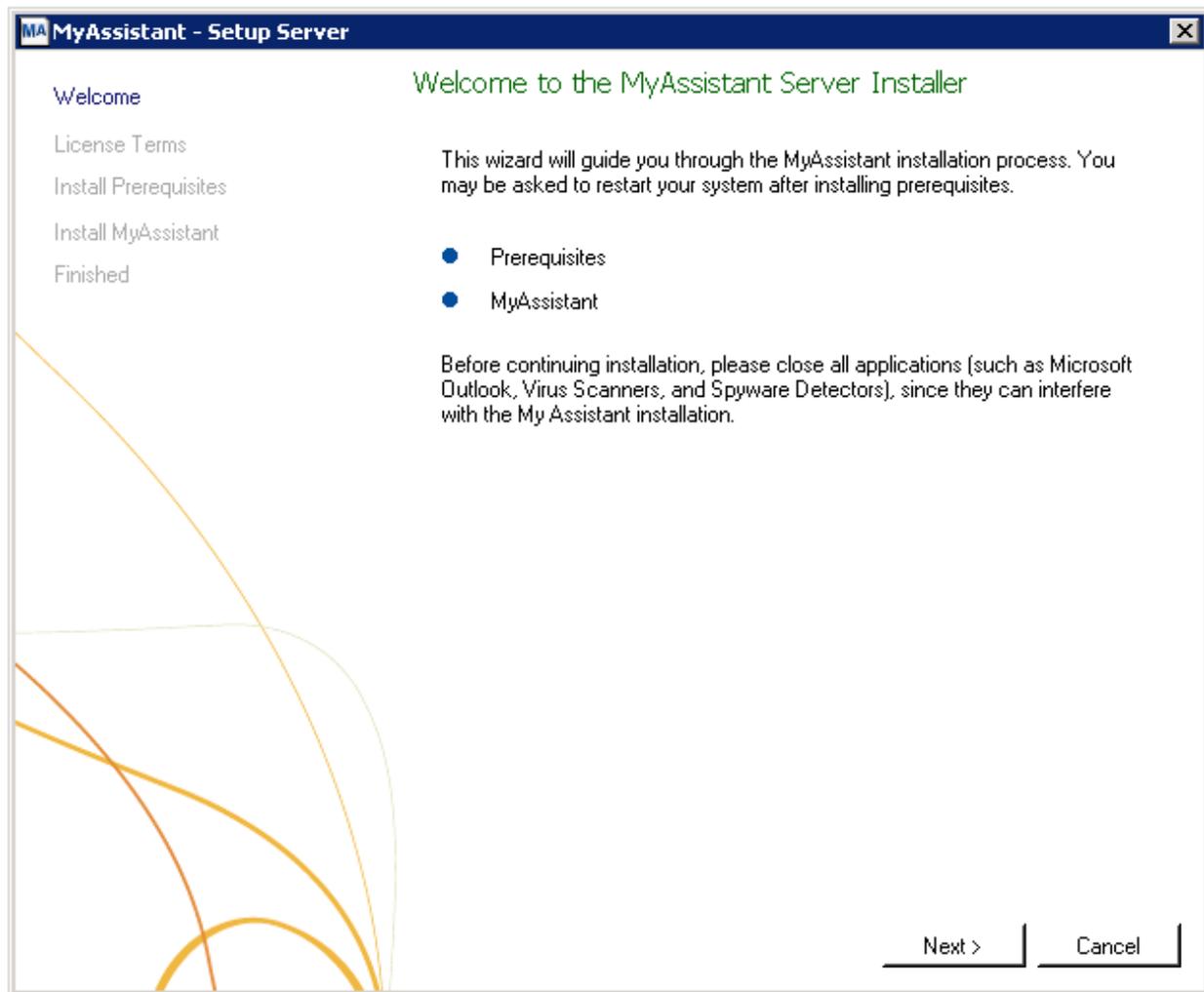
1. Log on to your Timberline server, or the computer that is the MyAssistant Server, with a Windows user that has Administrator or Unlimited permissions.
2. Confirm that you have closed all applications, and any anti-virus software is disabled.
3. If you were sent Installation Files in a web link, save the files to a location you can access from your MyAssistant Server as well as any MyAssistant workstations. Once saved, unzip the Installation Files.
 - a. Open the MyAssistant Files. Double click [**autorun.hta**].
4. The Sage Timberline Office MyAssistant Installation hub will open.



Click [**Install Server**] to initiate the MyAssistant Server upgrade.

Step 1 – MyAssistant Server Upgrade

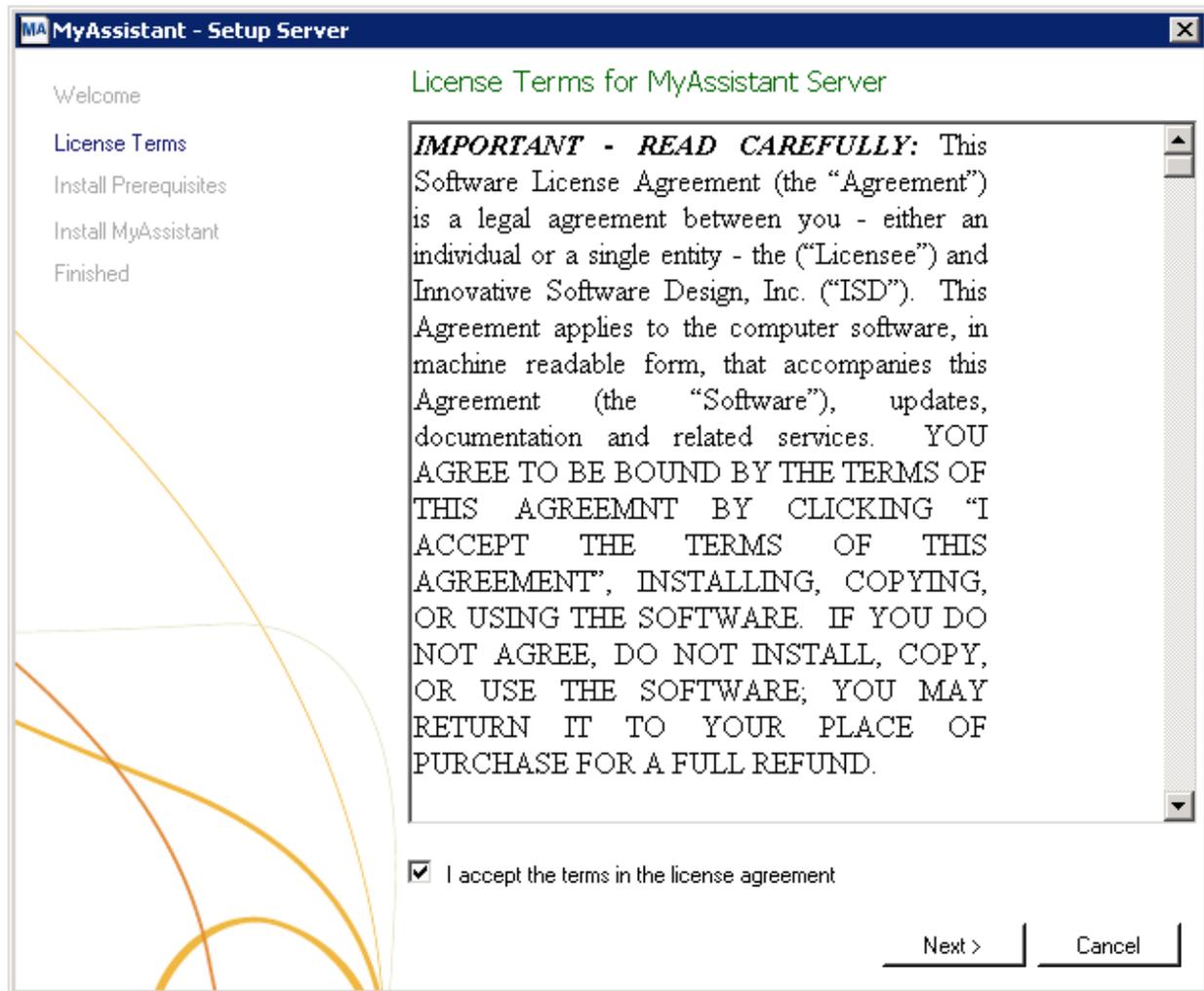
The MyAssistant Installation wizard displays once you have selected the type of install.



Click **[Next]** to continue.

Step 2 – MyAssistant License Agreement

You must accept the Innovative Software Design License Agreement to upgrade the Sage Timberline Office MyAssistant software. A complete copy of the License Agreement is provided with the MyAssistant installation files.



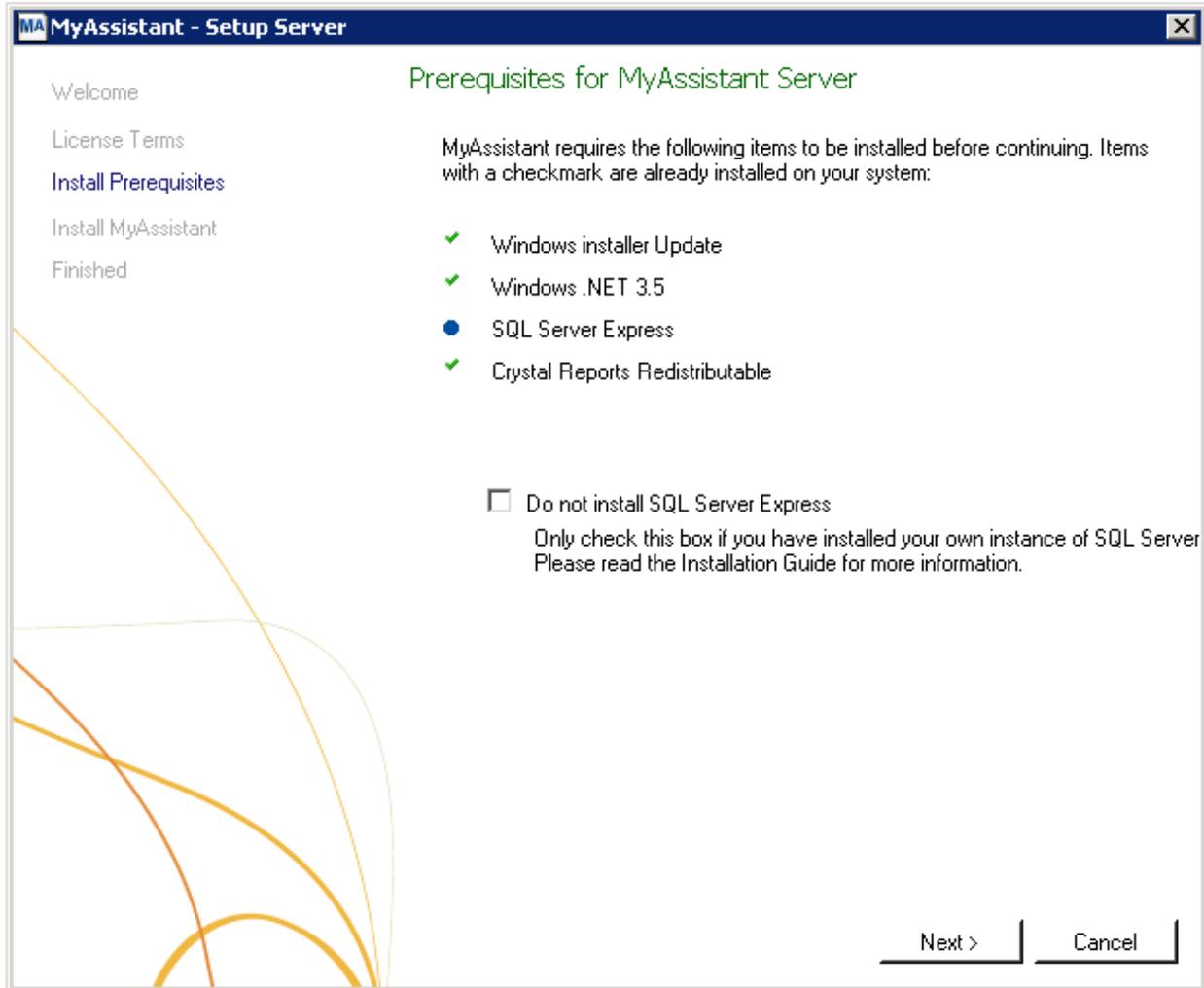
If you agree to the terms of the License Agreement, check the **I accept the terms in the license agreement** checkbox and click **[Next]** to continue.

Step 3 – Prerequisites for MyAssistant Server



NOTE: The MyAssistant installer will skip this step if you are upgrading from MyAssistant 9.7.0. All of the prerequisite software will already be installed.

This window displays the prerequisite software that MyAssistant will upgrade.



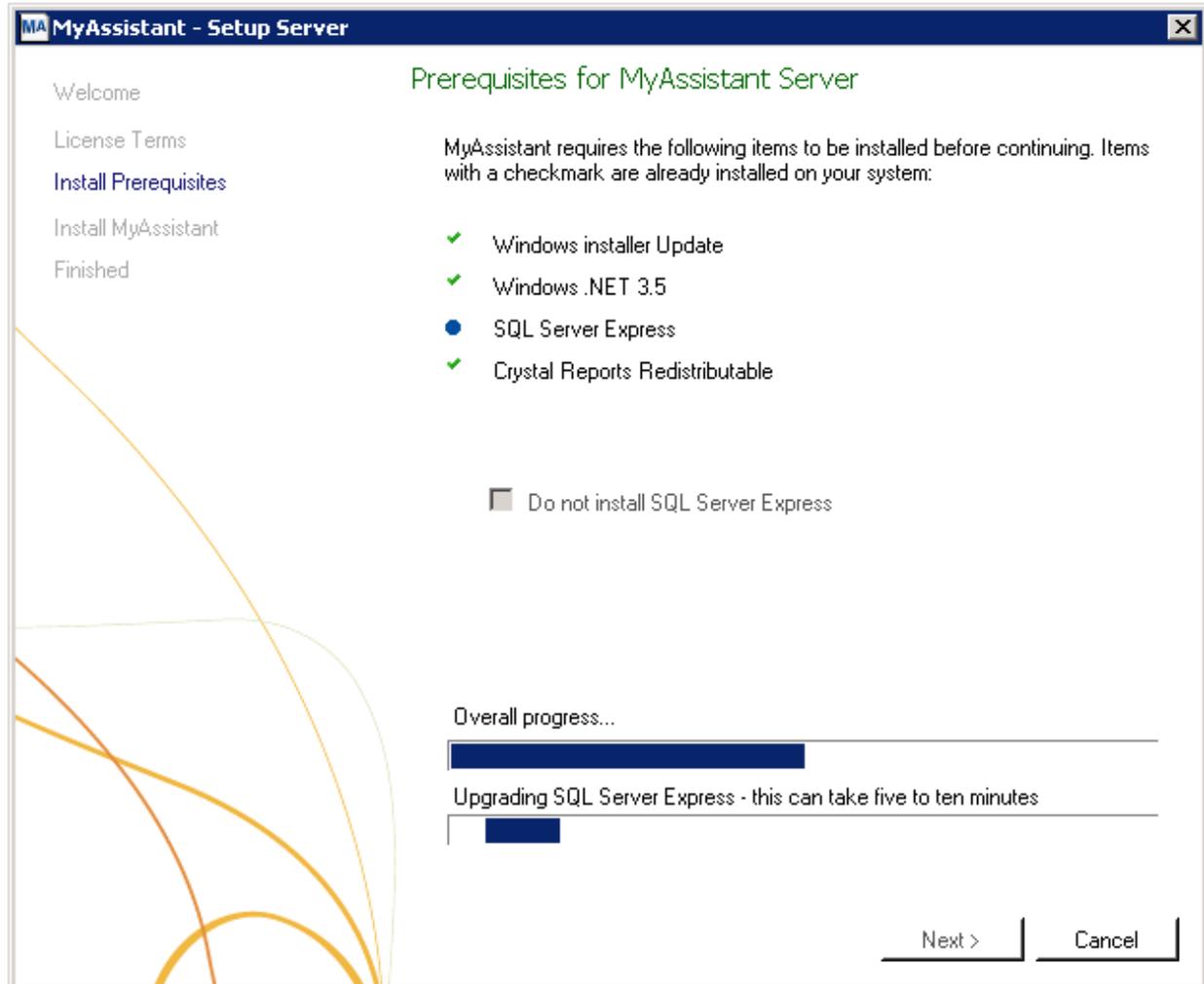
Click **[Next]** to begin the installing/upgrading of the MyAssistant prerequisite software.



CAUTION: Only check the box that reads “Do not install SQL Server Express” if you have separately purchased, installed and will be using a full version of the Microsoft SQL Server database. This requires advanced knowledge of SQL Server database engines.

Prerequisites: SQL Upgrade

This window shows the progress bar for the SQL install. This bar may stop moving across the screen, but SQL will still be working in the background.



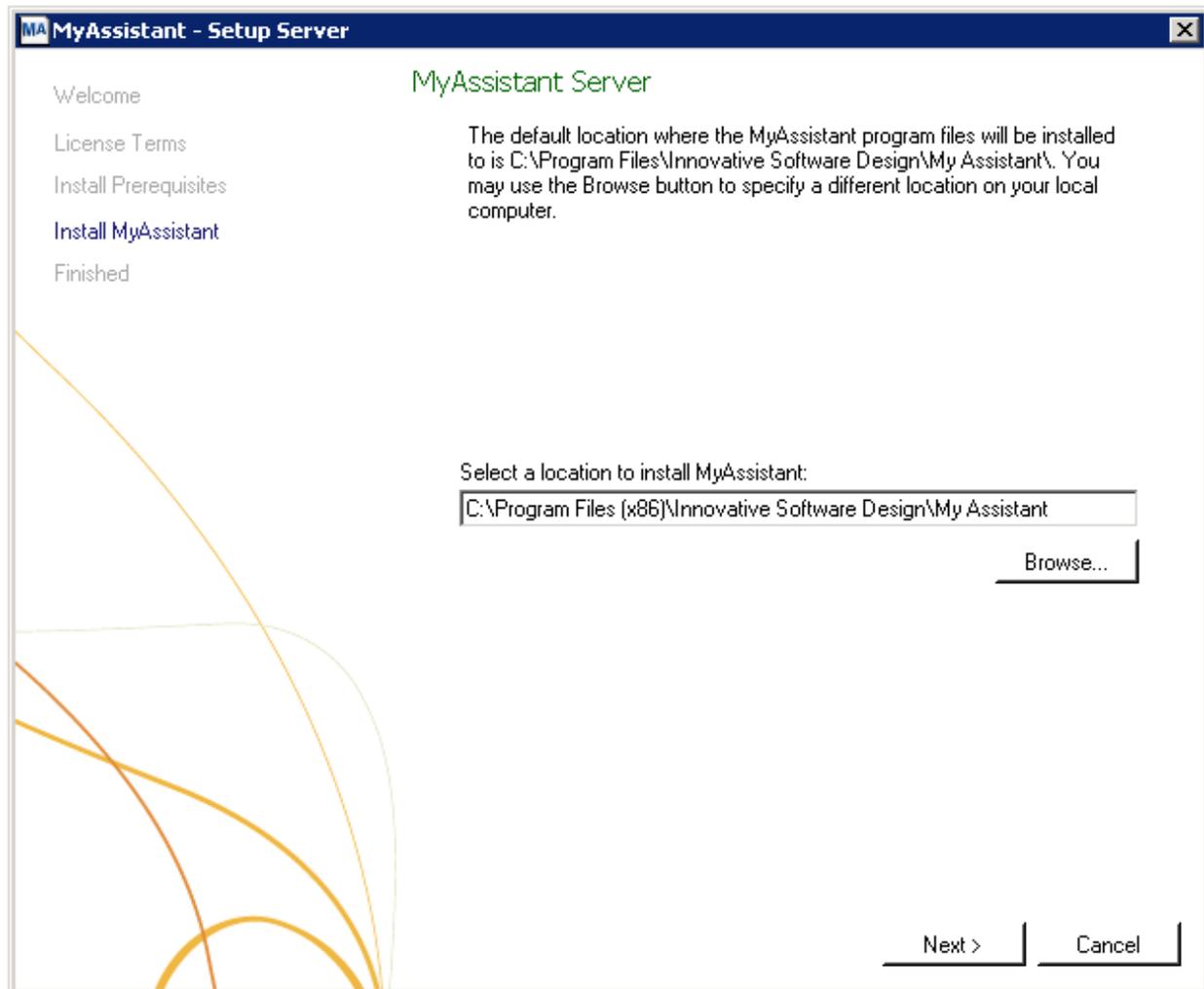
NOTE: Select 'Yes' or 'Run' if prompted to run SQLEXP32_x86_ENU.exe or SQLEXP_x64_ENU.exe.



IMPORTANT: The SQL upgrade can take 15-20 minutes. Please be patient. Do *not* cancel the SQL upgrade. Canceling could result in a broken SQL install.

Step 4 – MyAssistant Software

In this step you will determine where the updated MyAssistant program files will be installed on your server.

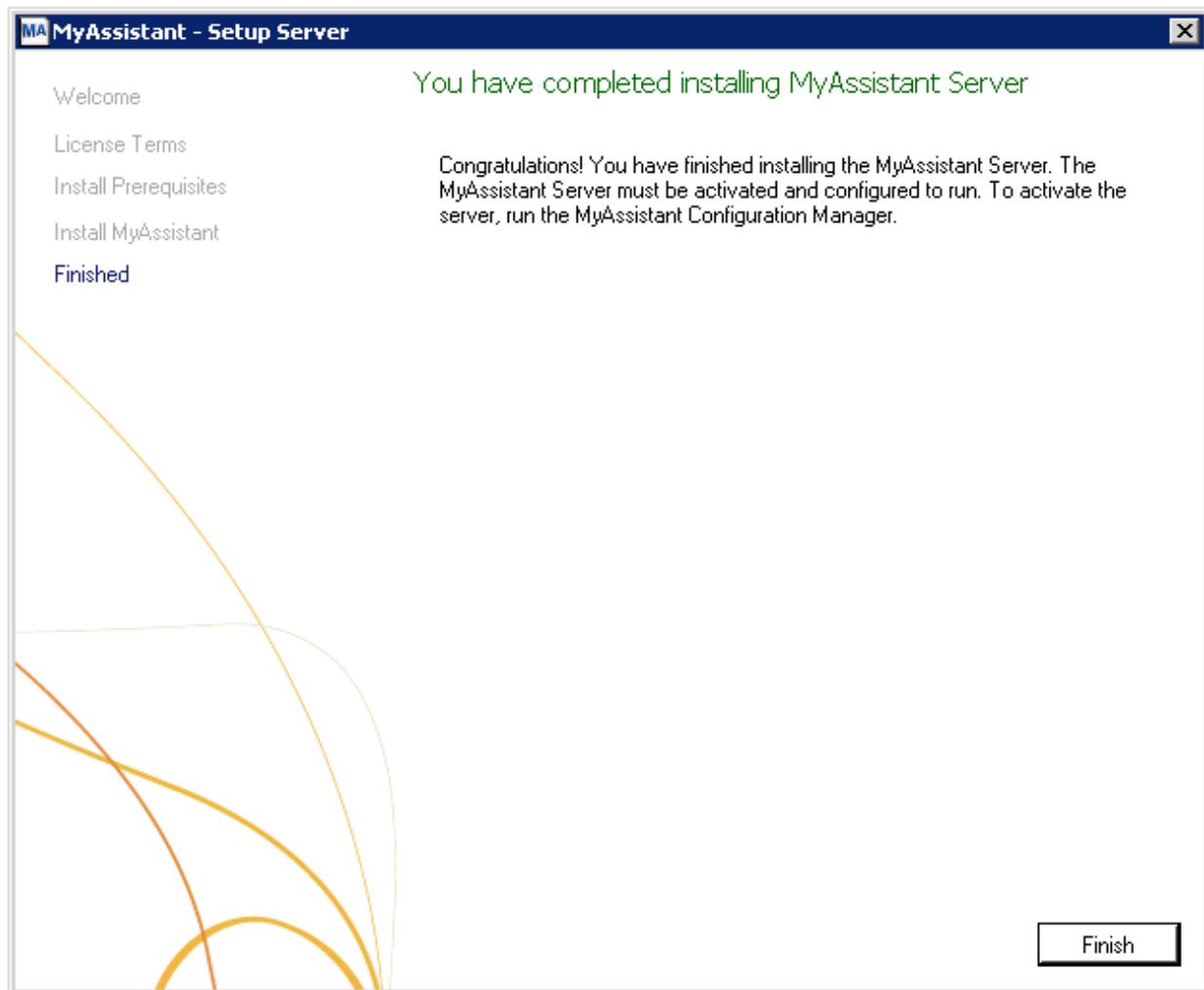


Accept the default location or use the **[Browse]** button to specify a different location.

Click **[Next]** to begin the installation of the updated MyAssistant software.

Step 5 – You Have Completed Upgrading the MyAssistant Server

Congratulations, you have completed upgrading the MyAssistant Server.



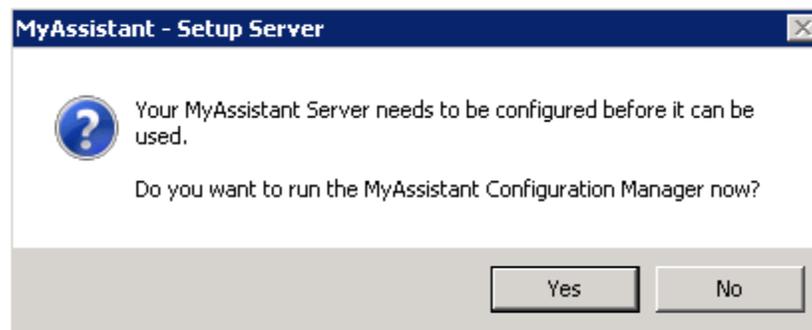
Click **[Finish]** to close the wizard and have the option to continue to the Configuration Manager.



NOTE: You must step through the Configuration Manager on the server before upgrading MyAssistant on any Workstations.

Start the MyAssistant Configuration Manager

After clicking Finish, you will be prompted to start the MyAssistant Configuration Manager.



Click **[Yes]**. Continue to Chapter 4 to walk through reactivating the MyAssistant Server.

Chapter 4 – MyAssistant Server Configuration

This chapter walks through reactivating the MyAssistant Server software. When in the configuration manager, you can verify that all settings are still accurate. This must be done before upgrading MyAssistant on any workstations.

Read this section carefully:

MyAssistant Server configuration steps:

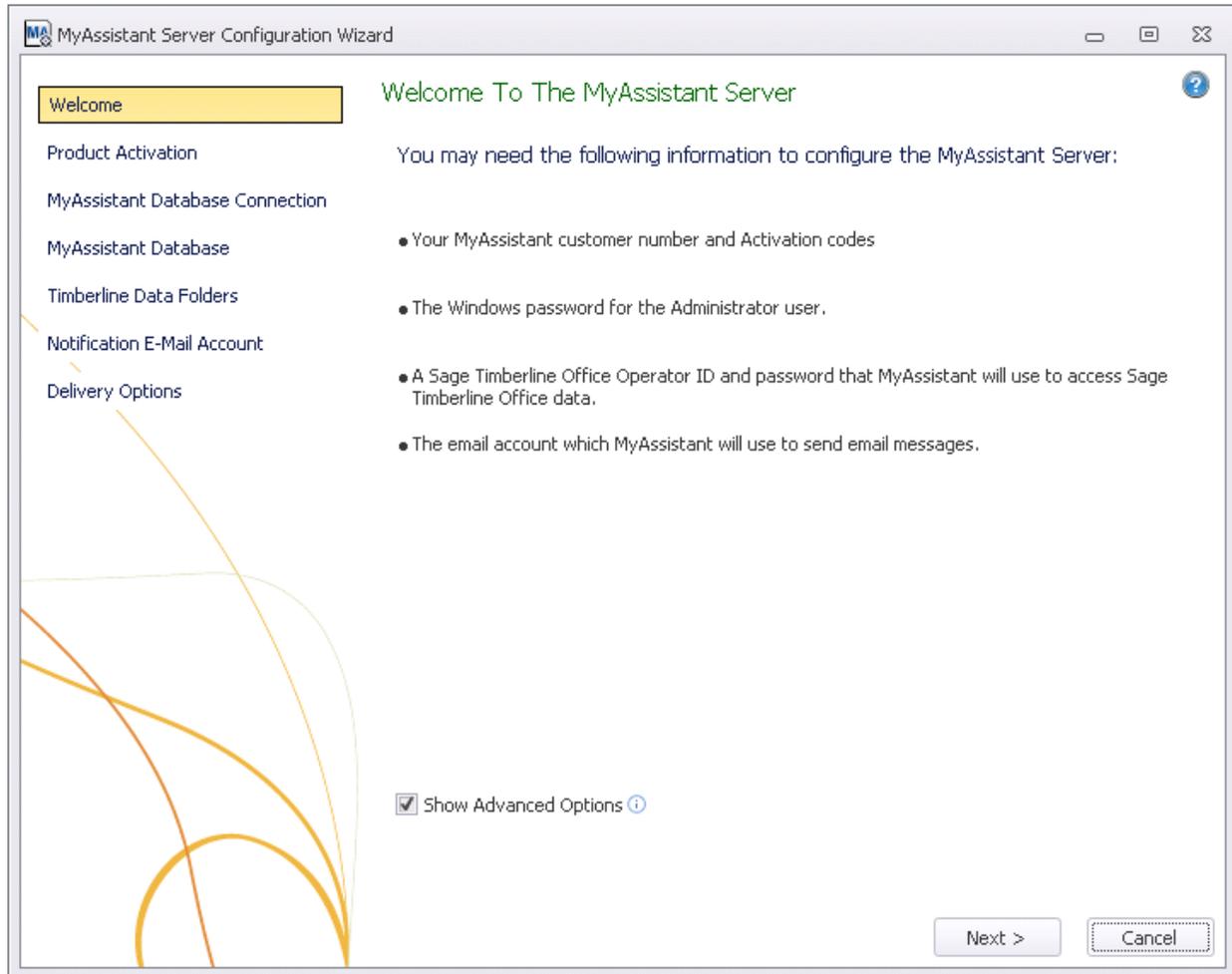
1. Reactivate the software.
2. Upgrade your MyAssistant database.
3. Step through the Configuration Manager, verifying that the prefilled settings are accurate.



NOTE: Reactivating the software and stepping through the Configuration Manager on the MyAssistant Server will take approximately 10 minutes.

Step 1 – Welcome

If the MyAssistant Configuration wizard isn't started, open it with the desktop icon or by following this path: Windows Start > All Programs > MyAssistant > **MyAssistant Configuration Manager**.



Only check **Show Advanced Options** if you are using any of the following and want to change any previously entered settings:

- Web Proxy Server.
- A full version of the Microsoft SQL Server database.
- Would like to define the Microsoft SQL Server credentials that will be used to access MyAssistant data.

Step 2 – Product Activation

The MyAssistant Server must be reactivated. The Product Key and Customer Number will not be prefilled. Enter your Customer Number and Server Product Key and click Activate.

Contact Sage Support if you do not have your MyAssistant Product Key(s).



NOTE: If you use a Web Proxy Server, check the box displayed under the Server Product Key field and verify that the information entered is accurate. The **Web Proxy Server** checkbox will only appear if you selected Show Advanced Options in the Welcome Screen (Step 1).

Step 3 – Database Connection



NOTE: This step will only be available if you click [**Show Advanced Options**] in the Welcome step.

MyAssistant Server Configuration Wizard

Welcome

Product Activation

MyAssistant Database Connection

MyAssistant Database

Timberline Data Folders

Notification E-Mail Account

Delivery Options

Connect to the MyAssistant Database

Use the fields below to enter the computer name where the SQL Server database is installed and to create a SQL Server user.

Enter the computer that the database is located at:

Server Name:

Create a username and password for MyAssistant to access the SQL Server:

User Name:

Password:

Re-enter Password:

Show characters

Advanced Connection Settings

Instance name:

Database name:

Port number:

< Back Next > Cancel



CAUTION: Making changes to this step will break the connection to the MyAssistant database. Modifying these fields requires advanced knowledge of SQL Server database engines.

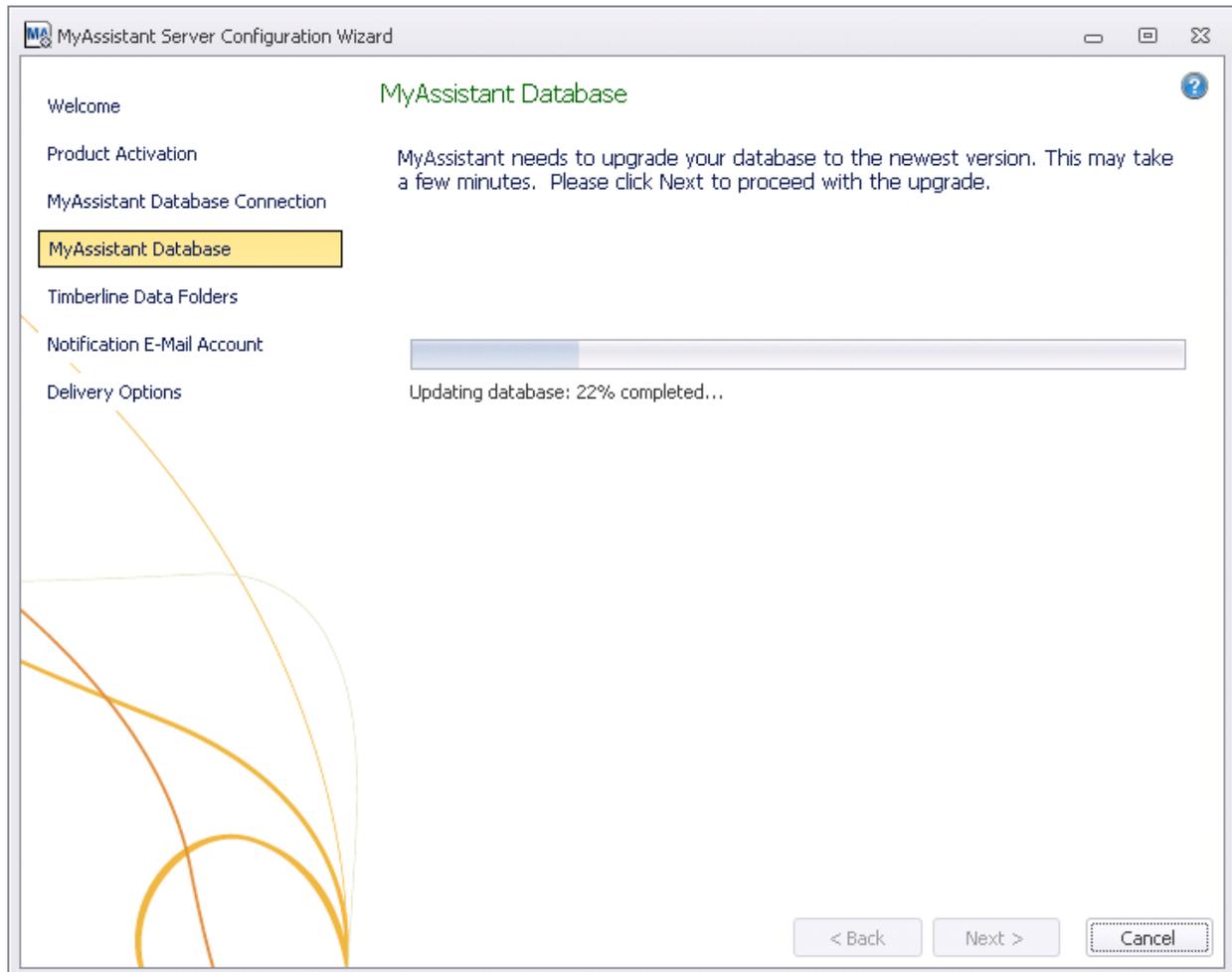
This step gives you access to the server name, SQL Server credentials, and SQL Instance and Port Number MyAssistant uses to connect to the Database.

This step will have all previously entered information prefilled, as well automatically create a SQL user name and password that the MyAssistant workstation will automatically pick up. You do not need to know the password for these credentials.

Click [**Next**] to continue.

Step 4 – Upgrade the MyAssistant Database

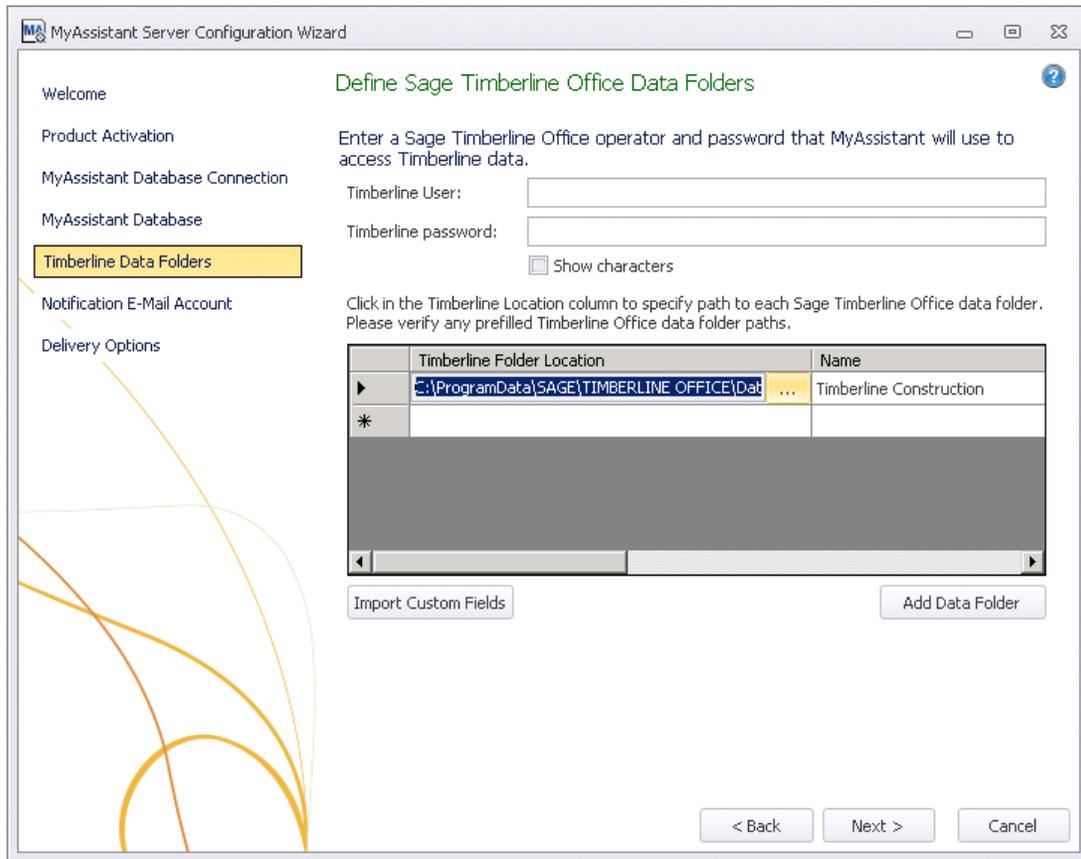
MyAssistant will perform the necessary steps to upgrade your database.



Click **[Next]** to upgrade the database.

Step 5 – Sage Timberline Office Data Folders

Verify the information in this step is still accurate. These are the Sage Timberline Office data folders MyAssistant will be able to monitor, and the Timberline credentials MyAssistant will use to access the data.



If the Timberline password entered in this step is set to expire, you will receive a warning message from MyAssistant. When the password does expire, you will need to update MyAssistant with the new credentials. Change the Sage Timberline Office user to one where the password will not expire.

Click **[Next]** to continue. If there is more than one data folder selected in the table above, you will be asked select which folder to have the Custom Fields imported from. If there is only one data folder specified Custom Fields will be imported automatically.

Step 6 – Notification E-Mail Account

Verify your mail server settings are still accurate. Notification E-mails will originate from the name and E-mail address specified in this step.

MyAssistant Server Configuration Wizard

Welcome

Product Activation

MyAssistant Database Connection

MyAssistant Database

Timberline Data Folders

Notification E-Mail Account

Delivery Options

Notification E-Mail Account

Use the following to specify the e-mail account from which notification e-mail messages will be sent on this server.

From Name: MyAssistant

From E-mail Address: myassistant@gmail.com

Mail Server Settings

Outgoing Mail Server: smtp.gmail.com:587

Username: myassistant@gmail.com

Password: *****

Show characters

This server requires an encrypted SSL connection

< Back Next > Cancel

The mail server settings will show what was entered the last time the software was configured. If nothing has changed, click **[Next]**.

Step 7 – Delivery Options



NOTE: This step will only be available if you click [**Show Advanced Options**] in the Welcome step.

This step is used to determine when Daily Summary emails will be sent, as well as who will receive MyAssistant error messages.

The information on this step will be prefilled.



TIP: It is recommended that MyAssistant sends error messages to an account that is monitored.

Click [**Finish**] to close the MyAssistant Server Configuration Wizard.

Once the Configuration Wizard is closed, the Server portion of the MyAssistant upgrade is complete. Continue to Chapter 5 to upgrade the MyAssistant Workstation.

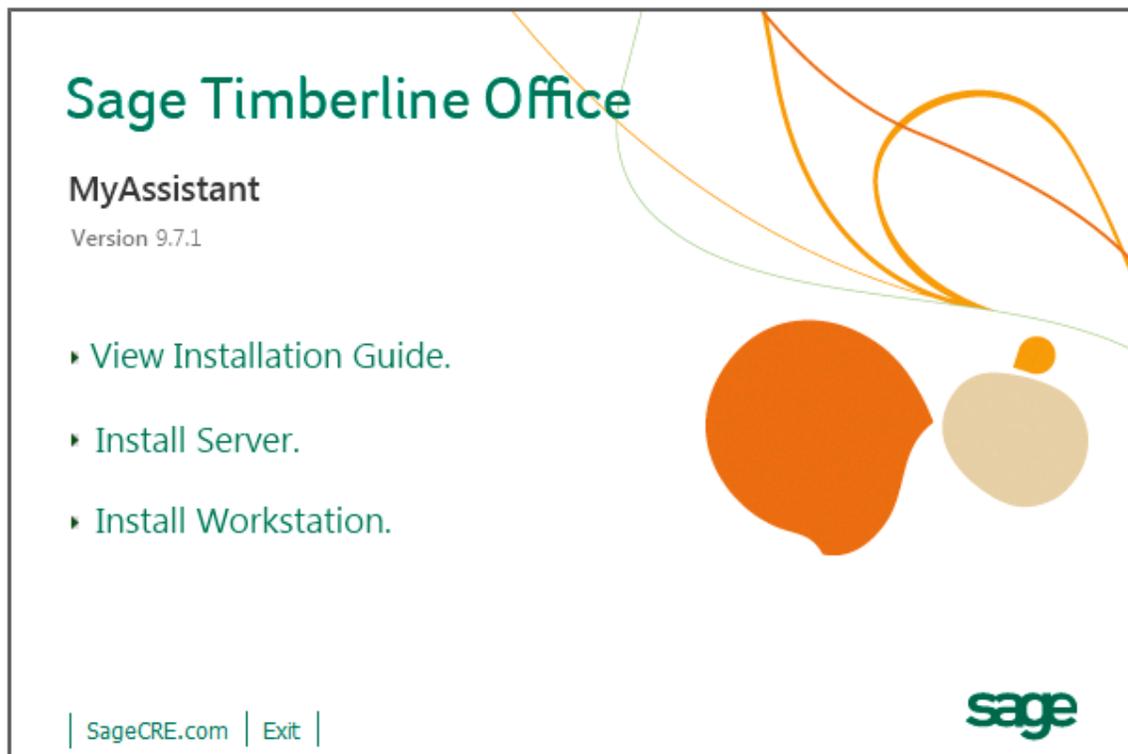
Chapter 5 – Upgrading MyAssistant Workstations



IMPORTANT: If you are upgrading a Terminal or Citrix Server, please skip to Chapter 7.

Perform the following to upgrade MyAssistant:

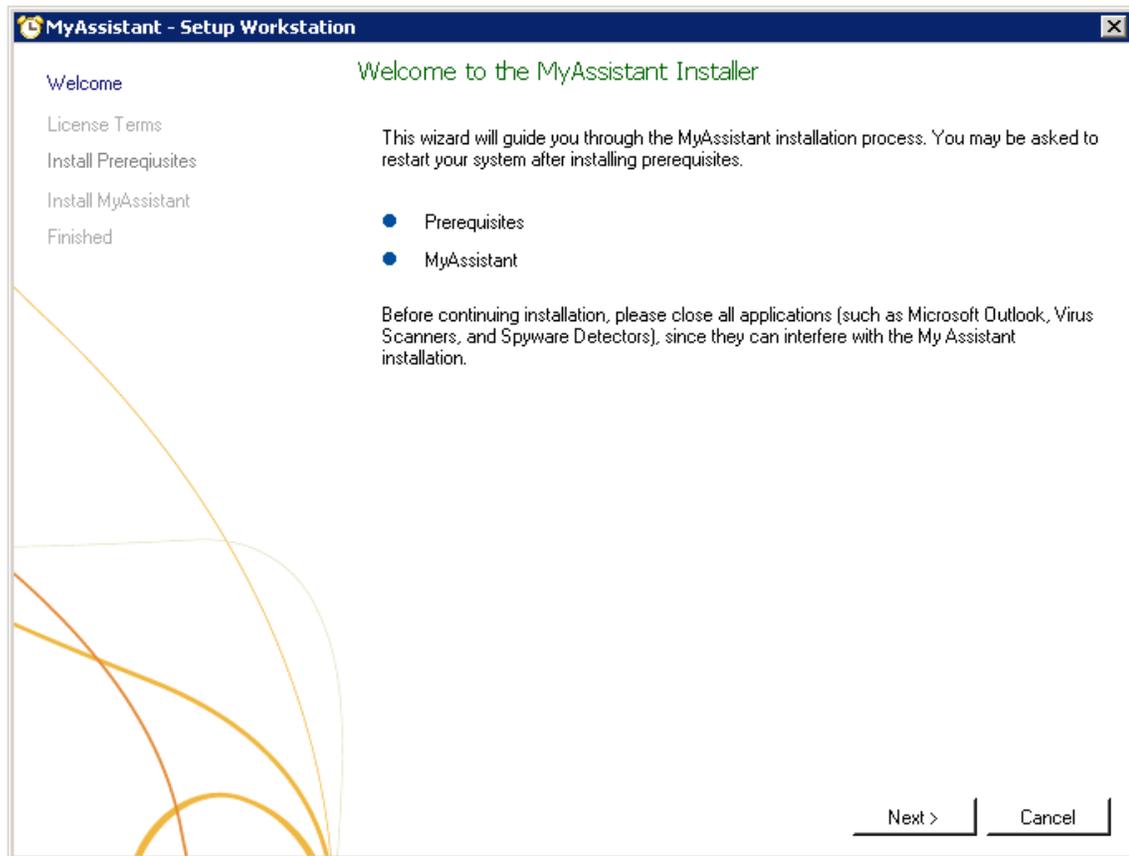
1. Log onto your workstation as a user with administrator privileges.
2. If you were sent Installation Files in a web link, save the files to a location you can access from your MyAssistant Server as well as any MyAssistant workstations. Once saved, unzip the Installation Files.
 - a. Open the MyAssistant Files. Double click [**autorun.hta**].
3. The Sage Timberline Office MyAssistant Installation hub will open.



Install Workstation – Selecting Install Workstation will perform a MyAssistant workstation upgrade.

Step 1 – Welcome

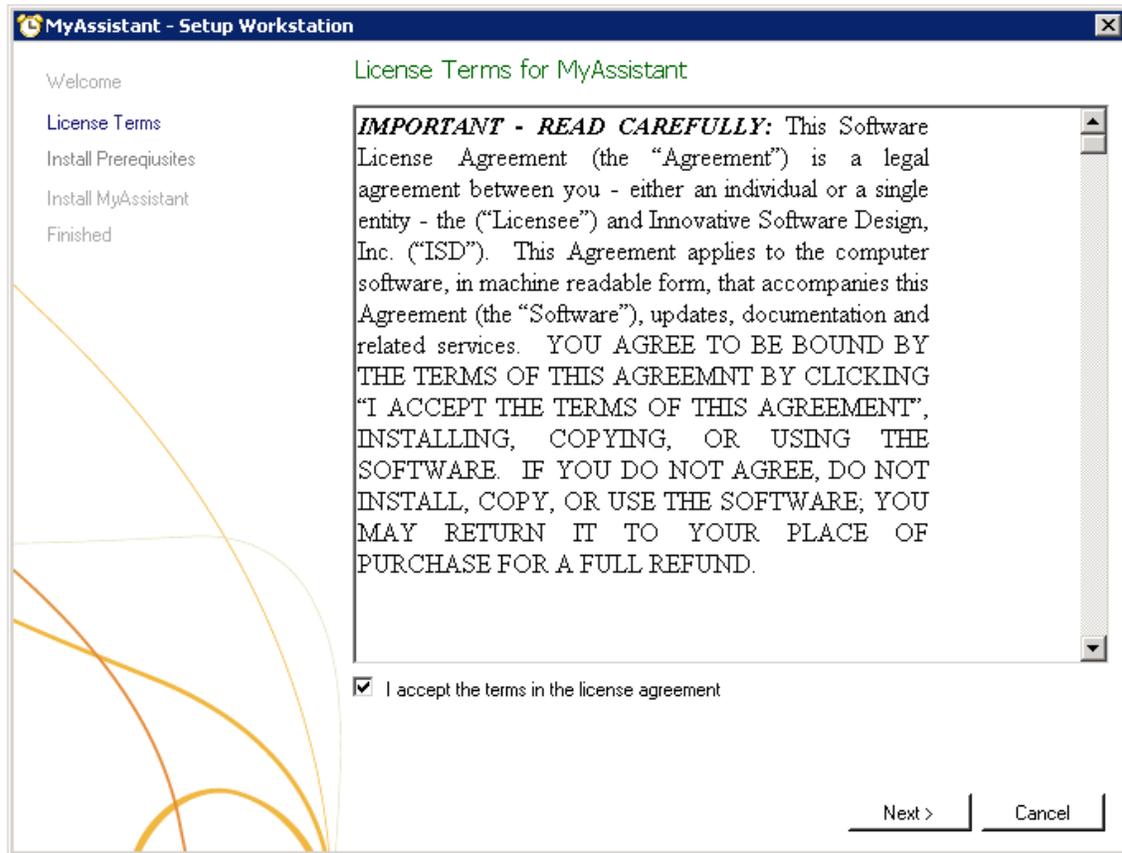
When you select **Workstation Install** on the MyAssistant splash screen, the Setup Workstation wizard will appear.



Click **[Next]** to continue.

Step 2 – MyAssistant License Agreement

Read and accept the Innovative Software Design End-User License Agreement. You must accept the Innovative Software Design License Agreement to use the Sage Timberline Office MyAssistant software.



Click **[Next]** to continue.

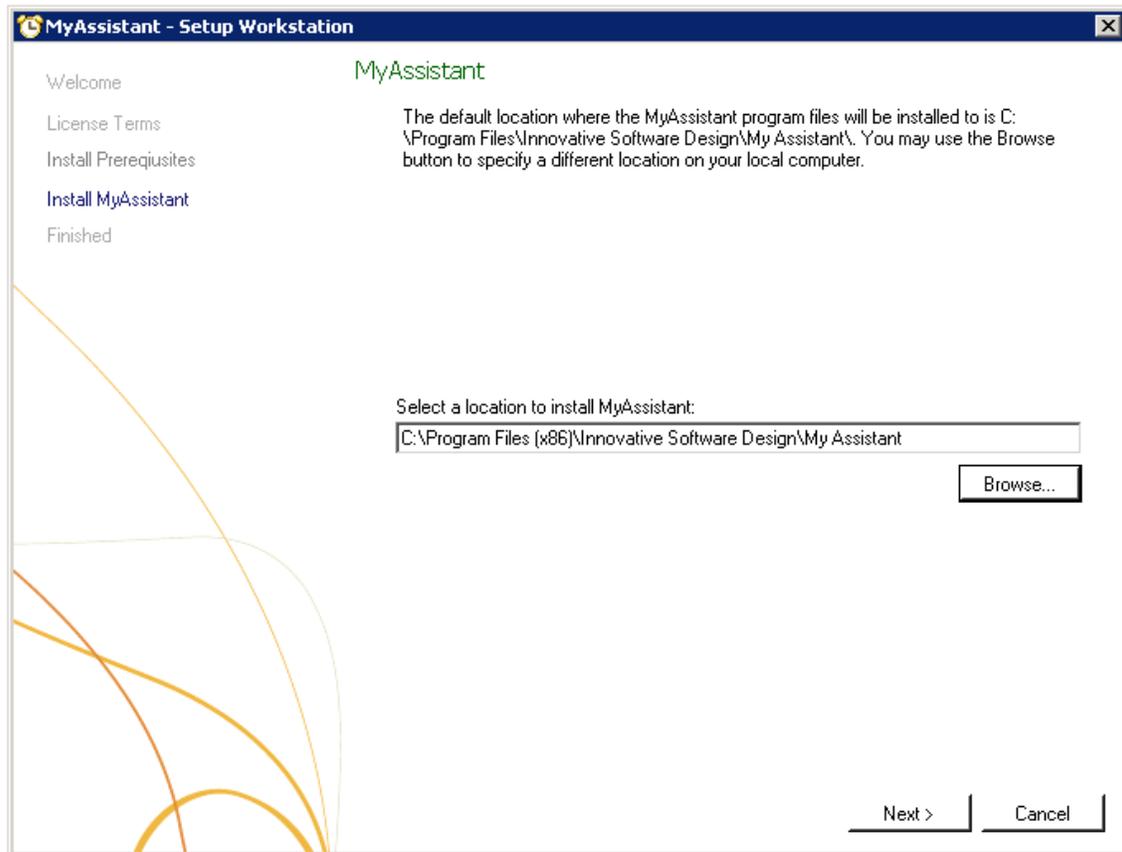
Step 3 – Prerequisites for MyAssistant Workstation

This window displays the prerequisite software that MyAssistant may need to upgrade. If there are no software updates necessary on the workstation, the Setup Workstation Wizard will skip this step.

Click [**Next**] to continue with the MyAssistant Workstation Install.

Step 4 – Install the Software

In this step you will determine where the updated MyAssistant program files will be installed on your workstation.



Accept the default location or use the **[Browse]** button to specify a different location.

Click **[Next]** to begin the installation of updated MyAssistant software on the workstation.

Step 5 – You Have completed Installing MyAssistant

Congratulations. MyAssistant has successfully been upgraded on this machine.



Click **[Finish]** to close the setup wizard.

Chapter 6 – MyAssistant Workstation Configuration



IMPORTANT: If you were previously logged on as an administrator, log off and log back on as the user who will run the MyAssistant software.

Double click on the MyAssistant icon on the desktop to open the MyAssistant software

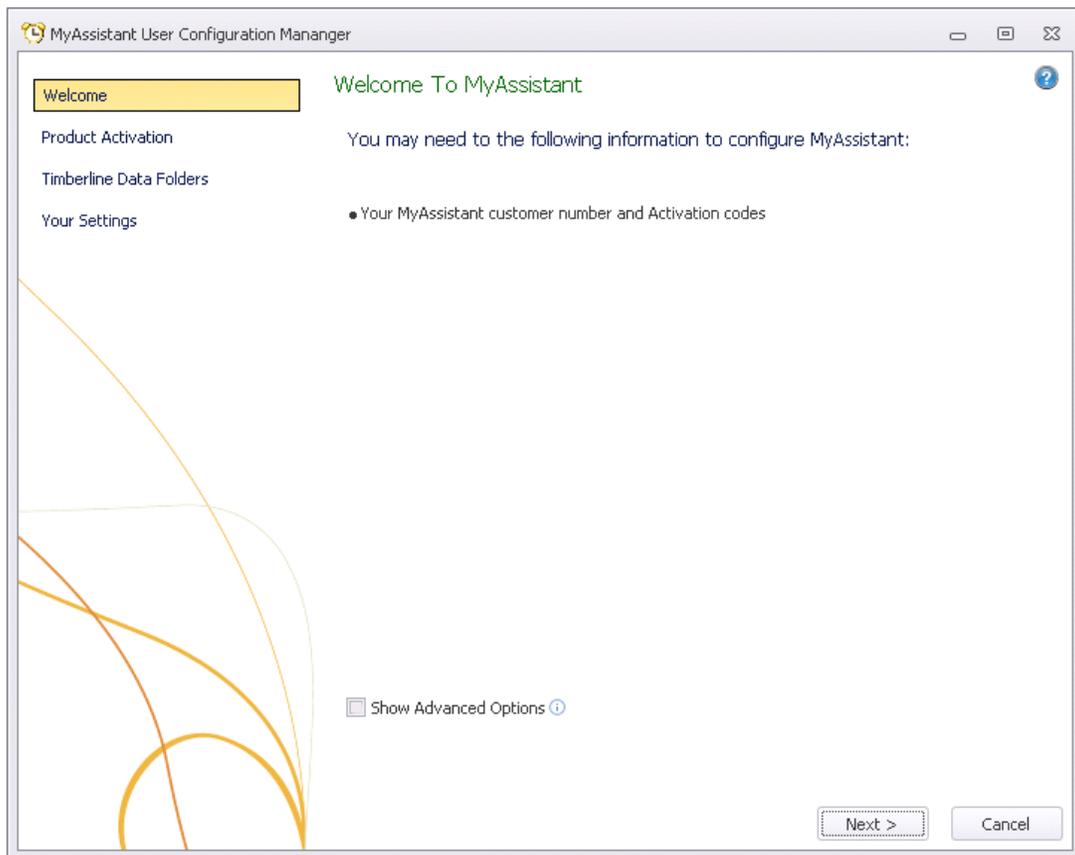
If there is not a shortcut on the desktop, follow the path below to open MyAssistant.
Open the Windows Start Menu > All Programs > MyAssistant (File) > **MyAssistant**



NOTE: When you open MyAssistant for the first time after upgrading, MyAssistant will verify a number of settings. If any of these settings are incorrect, or missing, the MyAssistant User Configuration Manager will open.

The User Configuration Manager will open to the step that requires new or updated information. Move through the steps below to find the applicable instructions.

Step 1 – Welcome Screen



Step 2 – Product Activation

You must activate MyAssistant. A working internet connection is required to complete this step. Your customer number and product key will already be entered. Reactivate before clicking next.

Customer Number – Enter your Sage customer number.

Product Key – Enter the Product Key that corresponds with the MyAssistant edition you would like to activate.

MyAssistant Designer – MyAssistant Designer is the full version of MyAssistant. This version contains the ability to create, activate and change tasks as well as run tasks, and view the notification log.

MyAssistant – MyAssistant Designer has the ability to run tasks on demand and view the notification log. This version does not provide the option to create, activate or change tasks.



NOTE: The Web Proxy Server connection fields will only be available if you clicked [**Show Advanced Options**] in the Welcome step. Verify the information and click [**Next**].

Step 3 – Entering Timberline Data Folder Information

The information in this step will be prefilled. Verify that it is accurate.

MyAssistant User Configuration Manager

Welcome

Product Activation

Timberline Data Folders

Your Settings

Define Sage Timberline Office Data Folders

Enter your Sage Timberline Office user name and password.

Timberline operator ID: MyAssistant

Timberline password: *****

Show characters

Click in the Timberline Location column to specify path to each Sage Timberline Office data folder. Please verify any prefilled Timberline Office data folder paths.

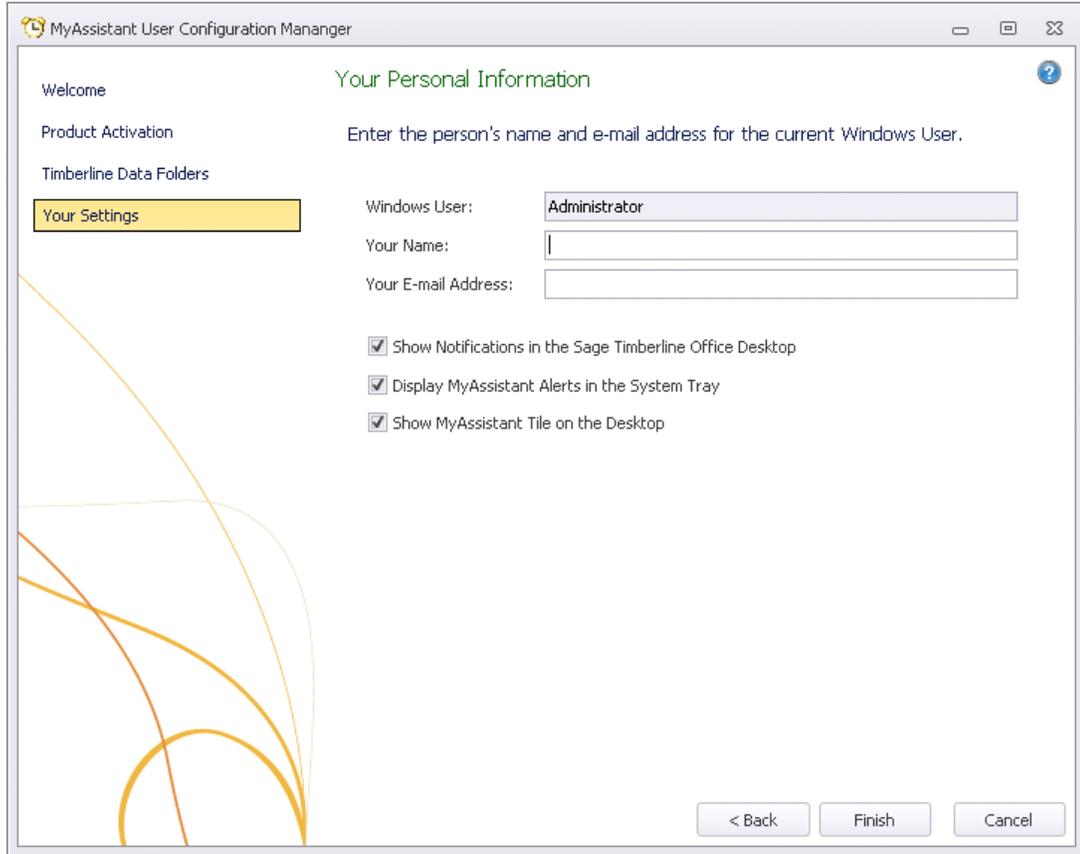
	Ignore	Timberline Folder Location	Name
▶	<input type="checkbox"/>	C:\ProgramData\SAGE\TIMBERLINE OFFICE\...	Timberline Construction

< Back Next > Cancel

Click **[Next]** if all information is correct.

Step 4 – User Profile

This step shows the personal information for the Windows user on this workstation.



Sage Timberline Office MyAssistant will start upon clicking **Finish** in the wizard.

Chapter 7 – Installing on a Terminal Server



CAUTION: This chapter is written for clients who will be running the MyAssistant Server and at least one MyAssistant User on a Terminal or Citrix Server.

What is Involved

Perform the following to upgrade MyAssistant on a Terminal or Citrix Server:

1. Log onto the Server as a System Administrator
2. Run the MyAssistant Workstation Installation
3. Log onto the machine as the Windows user who will run the software
4. Open the MyAssistant user Application
5. Depending on a number of settings, the user may need to reactivate the software.

Before Upgrading

Before MyAssistant can be upgraded on any accounts other than the administrator, permissions must be given to specific files. Find a list below of the files. The paths have been provided for your convenience, however they may vary slightly.

If on Windows 2003:

- C:\Documents and Settings > All Users > Application Data
- C:\Program Files\Innovative Software Design
- OR
- C:\Program Files(x86)\Innovative Software Design
- The ability to write to the HKEY_CURRENT_USER hive in the registry.

If on Windows 2008:

- C:\Program Data
- C:\Program Files\Innovative Software Design
- OR
- C:\Program Files(x86)\Innovative Software Design
- The ability to write to the HKEY_CURRENT_USER hive in the registry.



IMPORTANT: Permissions need to be given to these folders prior to activating any MyAssistant users on this machine.

Activating the MyAssistant Workstation

Once the MyAssistant Server is installed and activated, log onto the Terminal or Citrix Server as the Windows user who will be using the MyAssistant software.

- If there is a **MyAssistant** icon on the desktop, double click to open the User Configuration Manager.
- If there is not an icon on the desktop follow this path:
Start > All Programs > Sage > MyAssistant (folder) > **MyAssistant**

When the User Configuration Manager is open complete chapter 4 to activate the MyAssistant workstation.

Chapter 8 – System Check

Once MyAssistant has been successfully installed, move through the items below to ensure MyAssistant is running correctly.

Run a Task from the MyAssistant Application

1. Open MyAssistant on the MyAssistant workstation.
2. Select an activated Task.
3. Click **[Run]** or **[Run and Send]** on the Home ribbon.
4. You will receive a confirmation message on screen when the Task has run successfully.

Run a Task and view the Notifications from the MyAssistant Live Tile

1. Log onto the MyAssistant Workstation.
2. If the green MyAssistant Live Tile is not loaded on the desktop perform the following:
 - a. Open the MyAssistant Application.
 - b. Follow this path: File > Settings
 - c. In the Settings window, move to the **Your Settings** step.
 - d. Ensure all 3 boxes are checked in this step and click **[OK]**
 - e. The Live Tile will load on the Windows Desktop.
3. Once the Live Tile is loaded on the windows desktop, click **[Check For]** to expand the menu. Select a Task to run it.
4. You will receive a message on screen when the Task has run successfully.
5. Click **[OK]** in the confirmation message.
6. The MyAssistant QuickViewer will open with the Notifications listed for the Task.

View the Notifications from the MyAssistant Sage Desktop Plugin

1. Open the Sage Desktop
2. Look down the Task list for the MyAssistant folder.
3. Expand the folder.
4. Move through the MyAssistant tree until you see a MyAssistant Task
5. Please Note: Only activated Tasks will show up in this list.
6. Double click on a MyAssistant Task.
7. Click **[No]** in the message asking if you want to run the Task.
8. Ensure you can see the Notifications for the Task(s).

Check the MyAssistant Server and MyAssistant Workstation Installed

1. Log onto the MyAssistant Server.
2. From the Control Panel, open the **Add\Remove Programs** or **Program Features** list.
3. Look down the list for the **MyAssistant Sage Desktop Plugin v4.2**
4. If this program is installed, select it and click **[Remove]** or **[Uninstall]**.
5. When the program has successfully uninstalled, perform the above steps on each MyAssistant Workstation.

Conclusion

This completes the upgrade of the Sage Timberline Office MyAssistant software. The next step is to learn your way around the updated software. Please refer to the User Guide for information on using MyAssistant.