Sage 300
Construction and Real Estate

Sage 300 Construction and Real Estate

(formerly Sage Timberline Office)

MyAssistant Upgrade Guide

Version 12.1

This version of the software has been retired

sage

NOTICE

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Table of Contents

Conventions Used in this Document 4
Before You Begin 6
Support and Training 6
Telephone Support 6
Sage Customer Portal 6
Training 7
Sage University 7
MyAssistant YouTube Channel 7
Local Business Partner 7
Chapter 1 – Backup the MyAssistant Database 8
Chapter 2 – Uninstall the MyAssistant Desktop Plugin 10
Chapter 3 – Upgrading the MyAssistant Server 11
Step 1 – MyAssistant Server Upgrade 12
Step 2 – MyAssistant License Agreement 13
Step 3 – Prerequisites for MyAssistant Server 14
Step 4 – MyAssistant Software 15
Step 5 – You Have Completed Upgrading the MyAssistant Server 16
Start the MyAssistant Configuration Manager 17
Chapter 4 – MyAssistant Server Configuration 18
Read this section carefully: 18
Step 1 – Welcome 19
Step 2 – Product Activation 20
Step 3 – Database Connection 21
Step 4 – Upgrade the MyAssistant Database 22
Step 5 – Sage 300 CRE Data Folders 23
Step 6 – Notification E-Mail Account 24
Step 7 – Delivery Options 25
Chapter 5 – Upgrading the MyAssistant Workstation(s) 26
Step 1 – Welcome 27
Step 2 – MyAssistant License Agreement 28
Step 3 – Prerequisites for MyAssistant Workstation 29
Step 4 – Install the Software 30
Step 5 – You Have completed Installing MyAssistant 31
Chapter 6 – MyAssistant Workstation Configuration 32
Step 1 – Welcome Screen 32

Step 2 – Product Activation 33
Step 3 – Entering Sage 300 CRE Data Folder Information 34
Step 4 – User Profile 35
Chapter 7 – Upgrading a Terminal Server 36
What is Involved 36
Before Upgrading 36
If on Windows 2003: 36
If on Windows 2008: 36
Upgrading the MyAssistant Server 36
Activating the MyAssistant Workstation 36
Chapter 7 – Test the Upgrade 37
Access Sage Timberline Office Data 37
Troubleshooting 37
Run Tasks and Receive Email Messages 37
Troubleshooting 37
Conclusion 38

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.

MyAssistant Upgrade Guide

This document steps you through the upgrade and configuration of the Sage 300 CRE MyAssistant software. If you are installing the MyAssistant software for the first time please refer to the MyAssistant Installation Guide included in the MyAssistant installation files.

Upgrading the MyAssistant software 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.

IMPORTANT: A time synchronization service such as Windows Time Service must be activated on all machines where MyAssistant is installed.

CAUTION: It is important that the MyAssistant software is upgraded via a supported upgrade path. The following chart outlines the supported upgrade paths based on the version of the MyAssistant software you are currently running.

To determine what version of the MyAssistant software you are currently running, open the software and select **File** > **Help** > [**About**]. The window that opens will show you the version of the software.

Review the table below for the supported MyAssistant upgrade paths.

Current MyAssistant Version	MyAssistant Upgrade Path
4.2 and higher	Upgrade directly to MyAssistant 12.1
4.0-4.1	Upgrade to MyAssistant 9.8.1, then upgrade to MyAssistant 12.1
3.x or earlier	Upgrade to MyAssistant 4.2, then upgrade to MyAssistant 12.1

If you upgrade from an unsupported path you risk corrupting your MyAssistant data.

Before You Begin

- Create a backup of your MyAssistant database prior to upgrading the software.
- Determine the computer where the MyAssistant server software is currently installed. It is most likely on your Sage 300 CRE server.
- Ensure the latest Microsoft Windows and Microsoft Office updates have been installed. Installing the High Priority updates is recommended.
- Gather your MyAssistant Product Keys and Customer Number.
- You must be running Sage 300 CRE on all machines on which MyAssistant will be installed. This includes the MyAssistant server.

TIP: Restart the MyAssistant Server prior to performing the upgrade. This will complete any Windows or other software updates where a restart is required.

Support and Training

Telephone Support

When you would like 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

Sage Customer Portal

You may log on to the Sage Customer Portal at:
https://customers.sagenorthamerica.com/irj/portal/anonymous/login.

The portal provides access to the following services:

- Knowledgebase: Find answers to your questions, access downloads, and subscribe to your favorite articles. This service is available online 24/7.
- Live Chat: Chat online with a customer support analyst, a great option for quick questions. Chat hours are Monday through Friday from 6 a.m. to 3 p.m. Pacific Time, with the same exceptions as telephone support.
- Online Support Request: If you have a question or an issue that is not urgent, you can submit an online support ticket. A customer support analyst will contact you during regular telephone support hours.

Training

Sage University

Sage University offers both recorded and live training sessions. Visit SageU.com for currently available and upcoming classes.

How to access MyAssistant training options in Sage University:

1. Enter **www.SageU.com** in your web address bar.
2. Click [**Customer Training**] and select your Sage 300 Product from the list.
3. In the page that opens, click [**Product Training**] on the left side of the screen.
4. Click [**MyAssistant**] in the list that opened.
5. Select either [**Realtime Learning**] or [**Replay Leaning**] and review the available options in each.

How to access Complimentary MyAssistant Training in Sage University:

1. Enter **www.SageU.com** in your web address bar.
2. Click [**Customer Training**] and select your Sage 300 Product from the list.
3. Click [**Complimentary Training**] on the left side of the screen.
4. Review the list of complimentary classes for a MyAssistant option.

MyAssistant YouTube Channel

The MyAssistant YouTube channel offers a variety of MyAssistant training videos. Subscribe to the MyAssistant YouTube channel to be notified when new videos are added.

How to access the MyAssistant YouTube channel:

1. Enter **www.YouTube.com/MyAssistantTraining**
2. The channel will open with all available videos listed.
3. Click on a video to watch.

Local Business Partner

Contact your local Business Partner to learn what types of MyAssistant training they can provide.

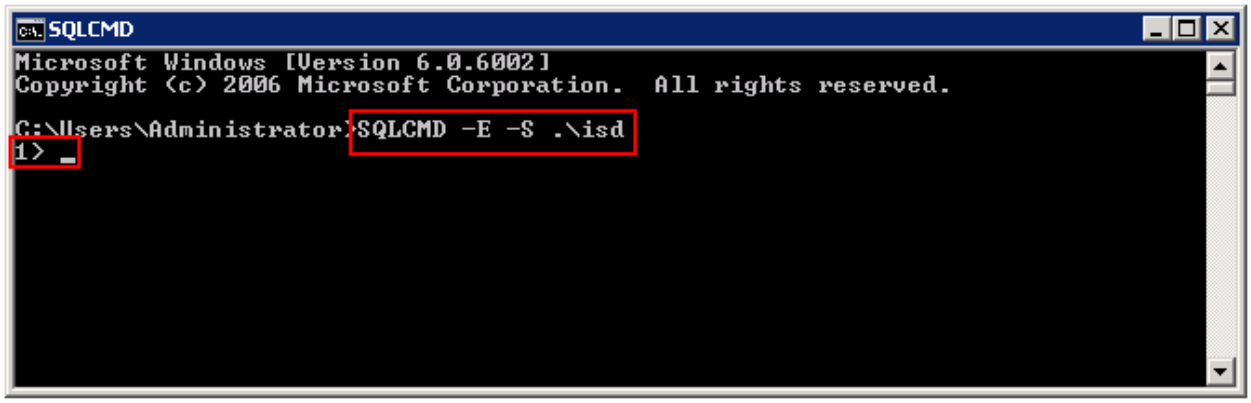
Chapter 1 – Backup the MyAssistant Database

Before upgrading your MyAssistant software, it is important that you backup your current MyAssistant database.

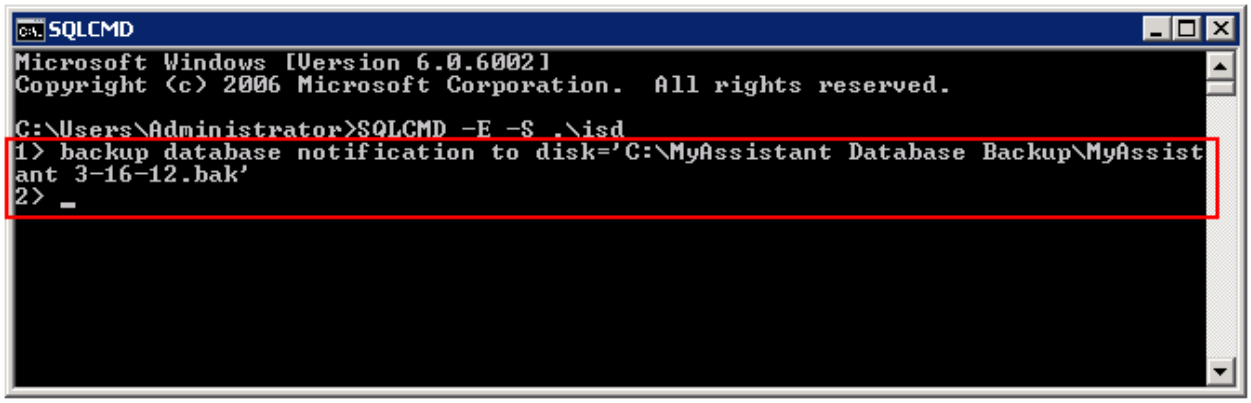
Please follow the steps below to backup your database.

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.

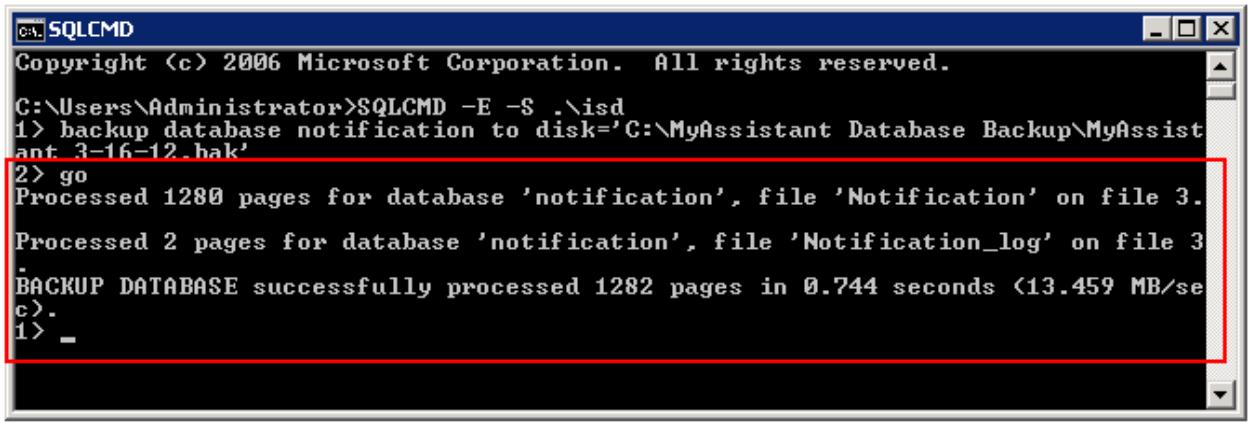
4. Type: **SQLCMD –E –S .\isd**
5. Hit ENTER on your keyboard. **1>** will appear on the next line.



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.



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.



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 Desktop Plugin

NOTE: Performing the following is only necessary if upgrading from MyAssistant 4.2.

Before upgrading your MyAssistant software, you need to uninstall the desktop plugin program.

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 Plugin**
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 any MyAssistant Workstations.

Chapter 3 – Upgrading the MyAssistant Server

Perform the following to initiate the MyAssistant Server upgrade.

1. Log on to your Sage 300 MyAssistant server with a Windows user that has Administrator or Unlimited permissions.

2. Confirm that you have closed all applications and disabled any anti-virus or Firewall software that may be running.

3. Using the link provided by Sage Software, download the MyAssistant installation files and save the .ZIP file to a folder on your machine. Consider saving the .ZIP file to a shared folder so it is accessible from any workstations where MyAssistant will be installed. Perform the following to initiate the MyAssistant Server Upgrade.

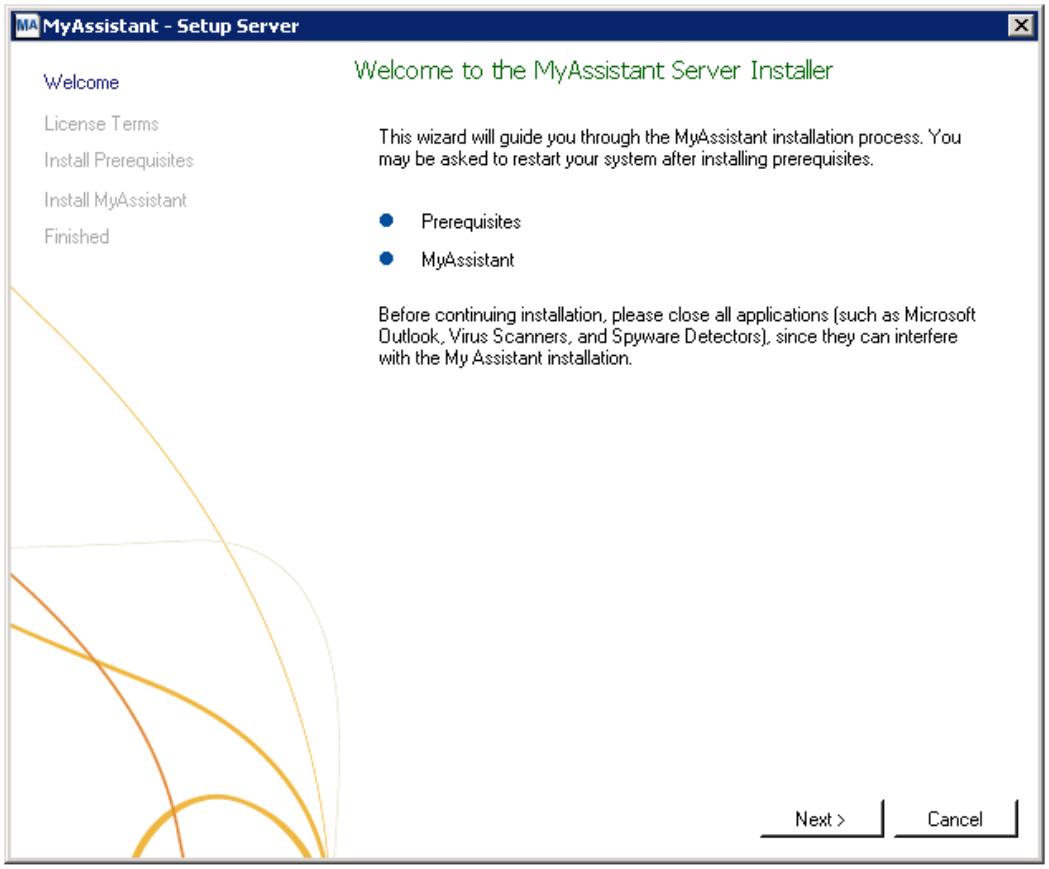
   a) Open the location of the downloaded MyAssistant Installation files.
   b) Unzip the files to a folder on the local drive on the MyAssistant Server.
   c) Open the location of the unzipped MyAssistant installation files and double click **autorun.hta**

4. The Sage 300 CRE MyAssistant Installation hub will open.

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

Step 1 – MyAssistant Server Upgrade

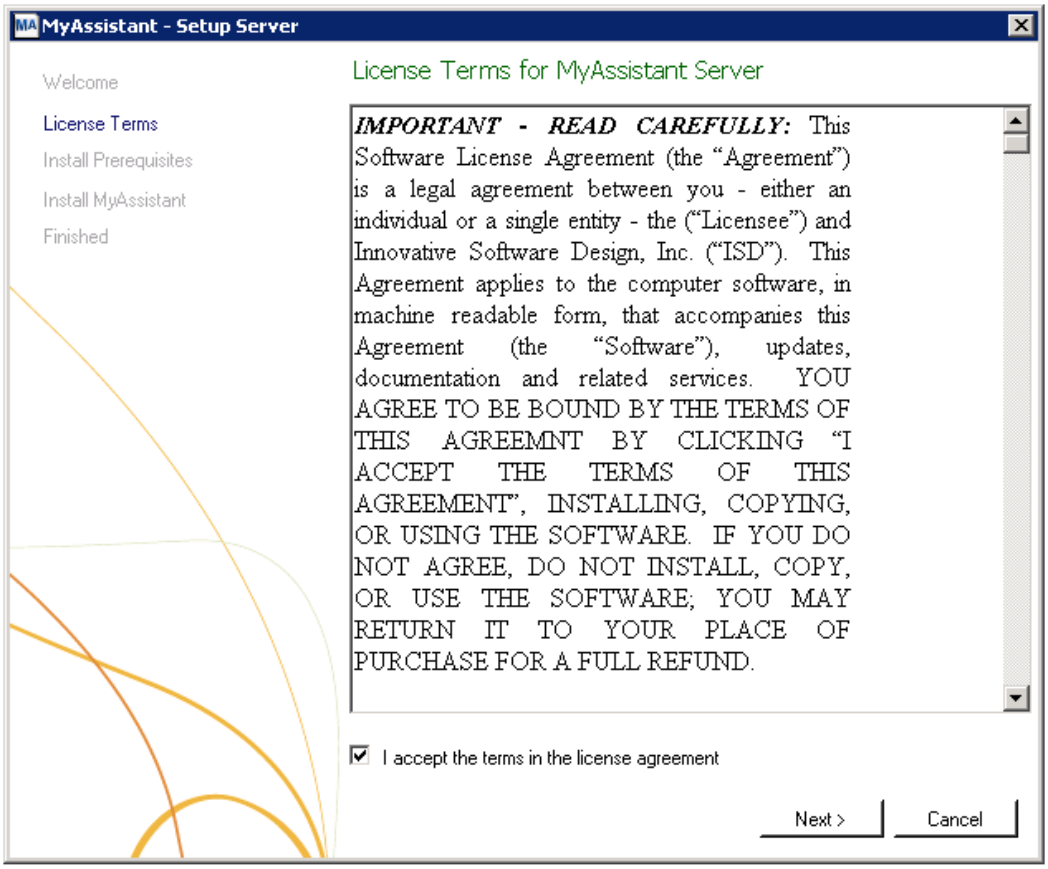
The MyAssistant Installation wizard displays once you have selected the type of install.



Click [**Next**] to continue.

Step 2 – MyAssistant License Agreement

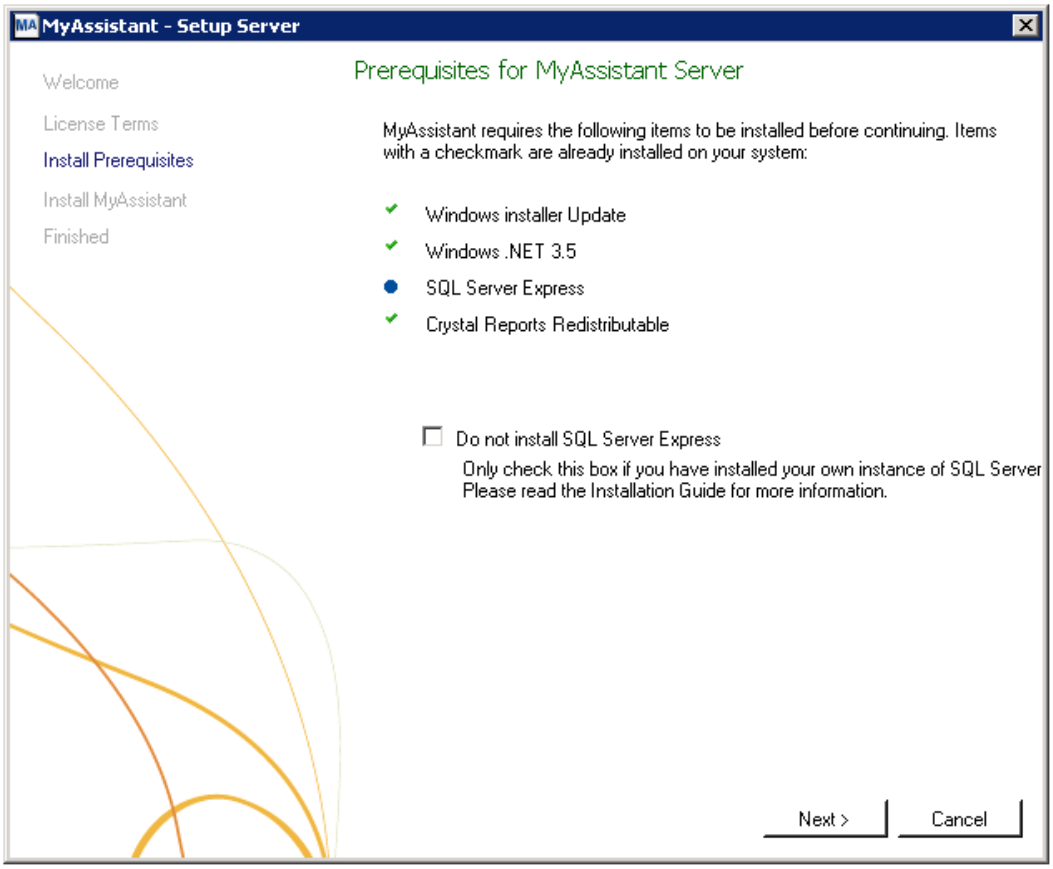
You must accept the Innovative Software Design License Agreement to upgrade the Sage 300 CRE MyAssistant software. A complete copy of the License Agreement is provided with the MyAssistant installation files.



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

This window displays the prerequisite software that MyAssistant will upgrade.



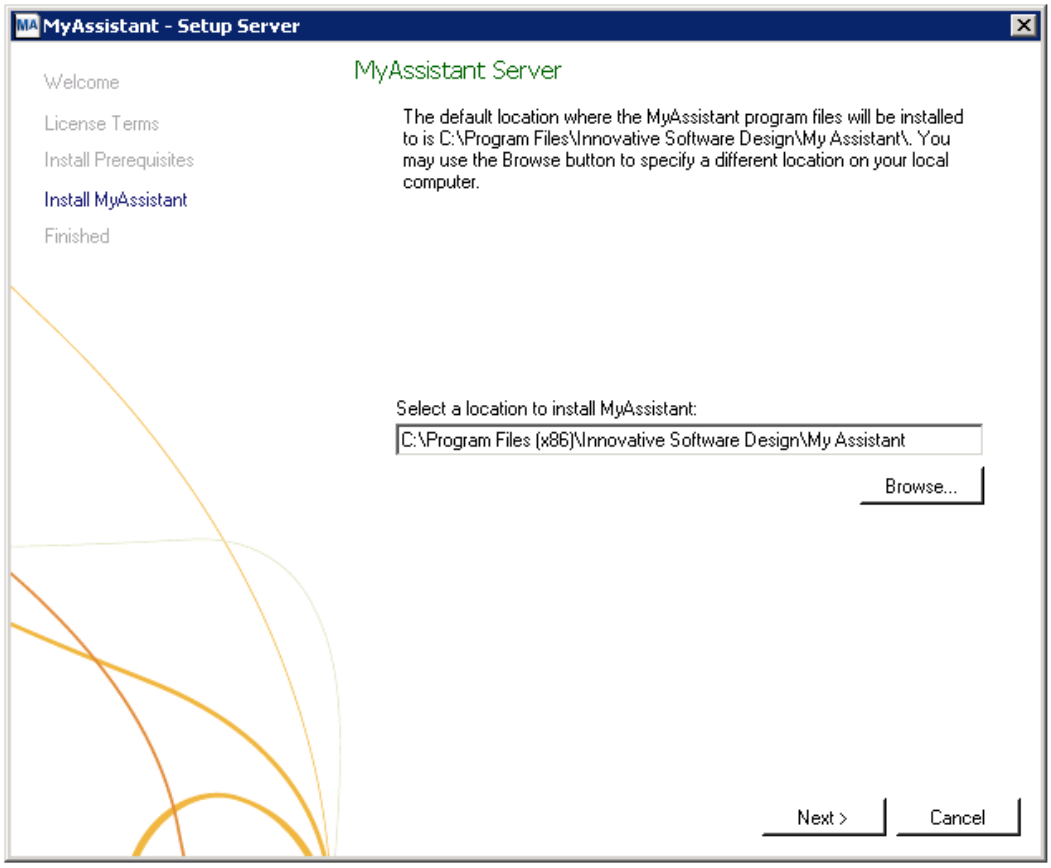
This window displays if any of the MyAssistant prerequisites need to be installed or upgraded. The green check mark indicates that the software is already running the correct version. The blue circle indicates the software that needs to be installed or upgraded.

CAUTION: *Only* check the "Do not install SQL Server Express" box if you have separately purchased, installed and will be using a full version of the Microsoft SQL Server database with MyAssistant. The MS SQL Server edition (i.e., Full or Express) is not displayed in the list of installed programs in Windows. Do not check this box if you are unsure whether you have a full version of Microsoft SQL Server installed. By checking this box you are taking full responsibility for the installation, setup, and maintenance of the SQL Server instance that MyAssistant will use.

IMPORTANT: The SQL upgrade can take 15-20 minutes. Please be patient. Do *not* cancel the SQL upgrade.

Step 4 – MyAssistant Software

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

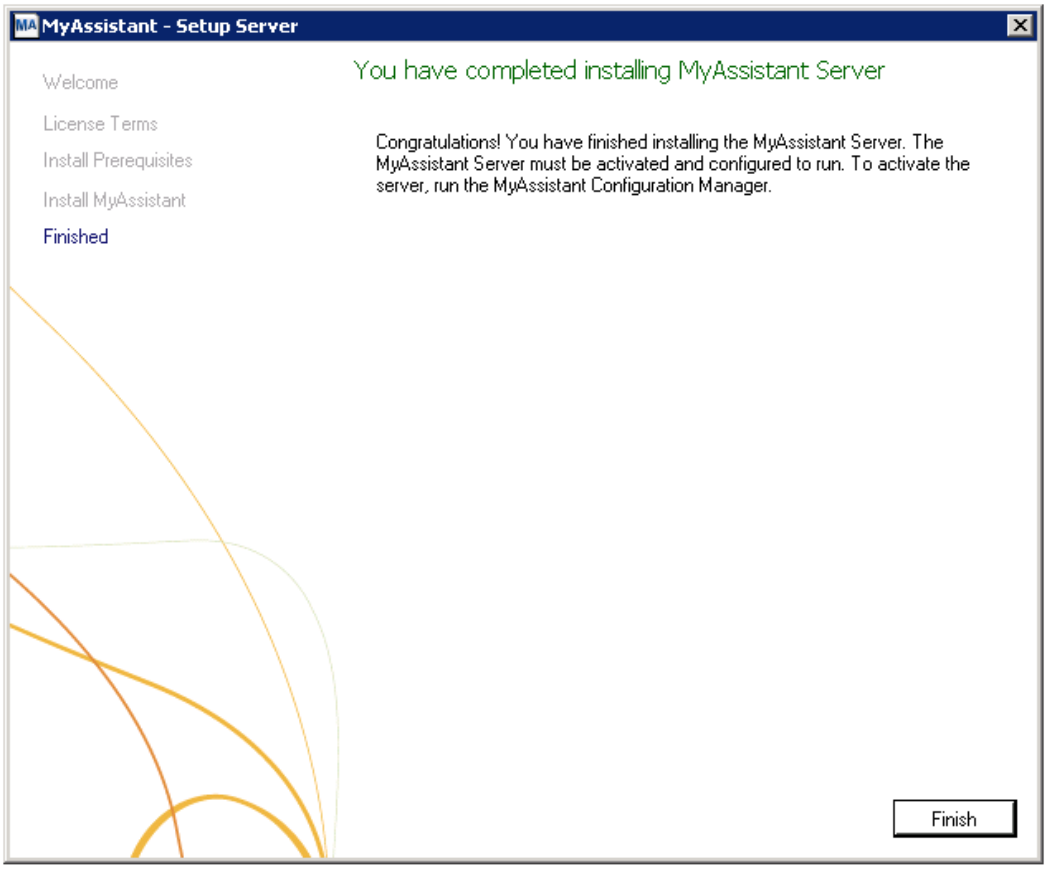


Accept the default location or use the [**Browse**] button to specify a different location.

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.

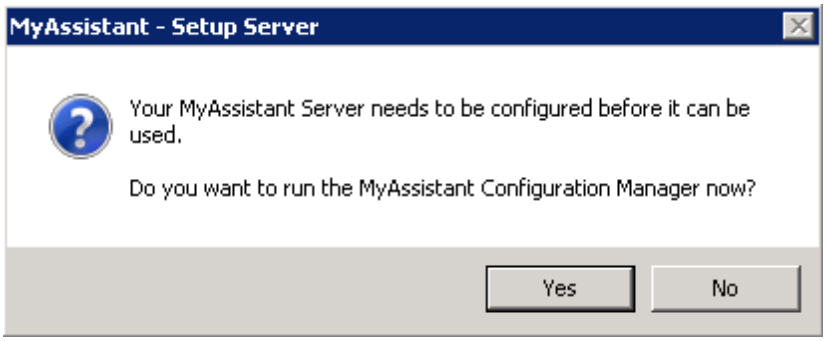


Click [**Finish**] to close the wizard and have the option to continue to the Configuration Manager.

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 2 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:

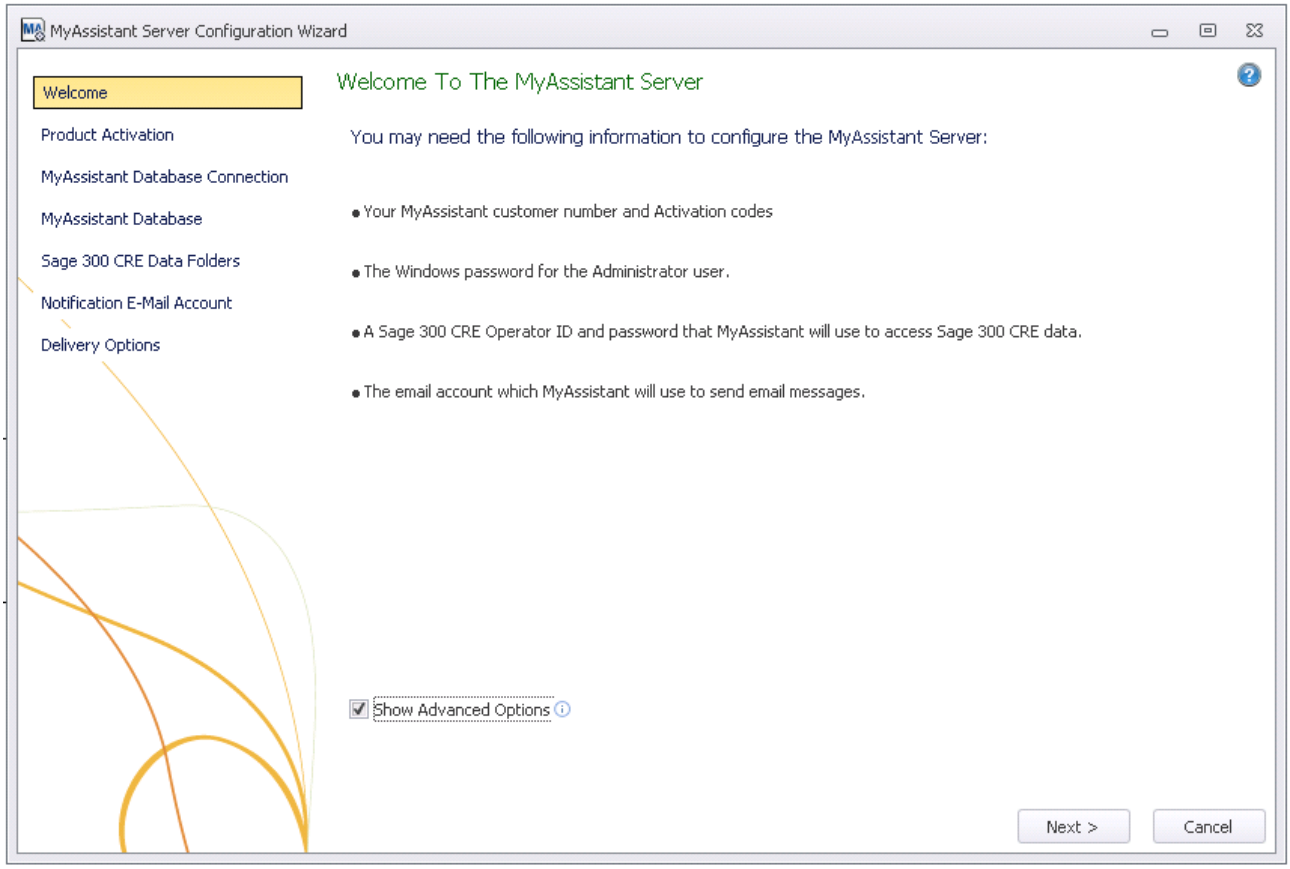
MyAssistant Server configuration steps:

1. Reactivate the software.
2. Upgrade your MyAssistant database.
3. Step through the Configuration Manager, and verify 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**.



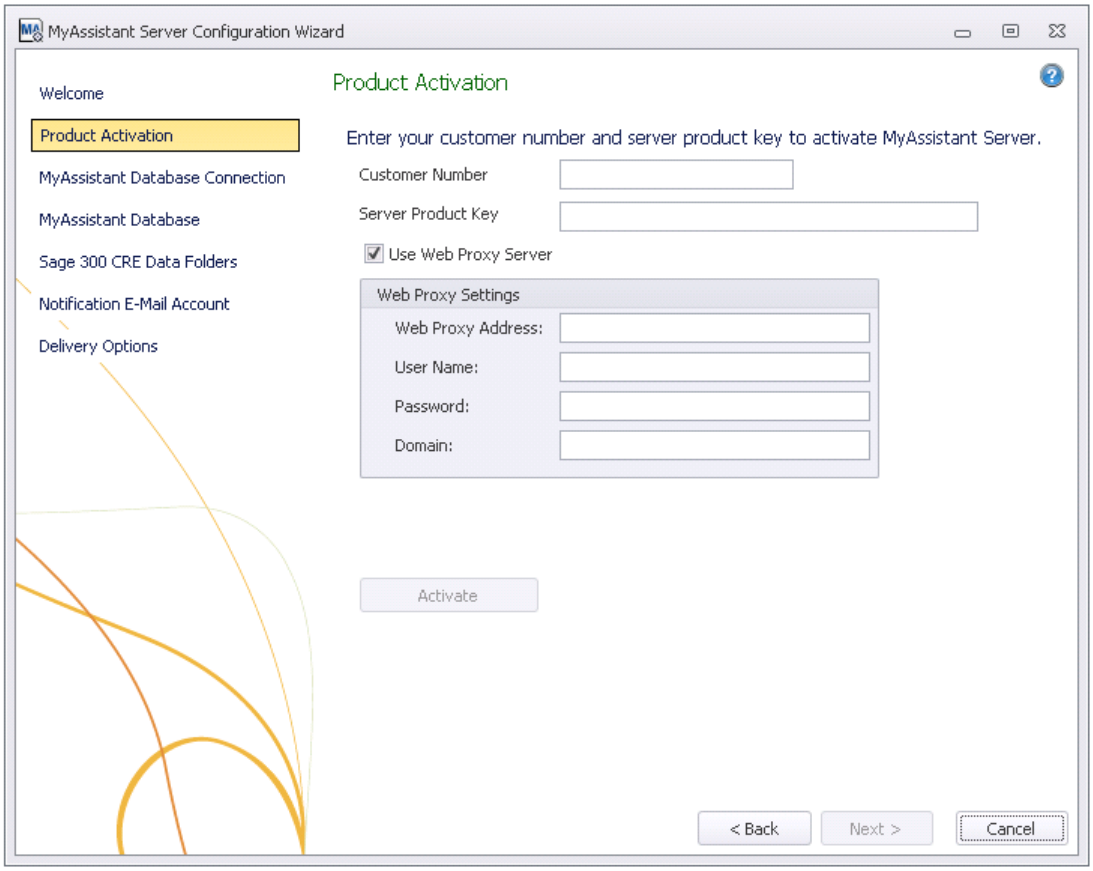
Only check **Show Advanced Options** if you:

- Are using a Web Proxy Server.
- Are using 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.

If established in a prior version of MyAssistant, the information for the items above will already be entered.

Step 2 – Product Activation

The MyAssistant Server must be reactivated. The Product Key and Customer Number may be prefilled.



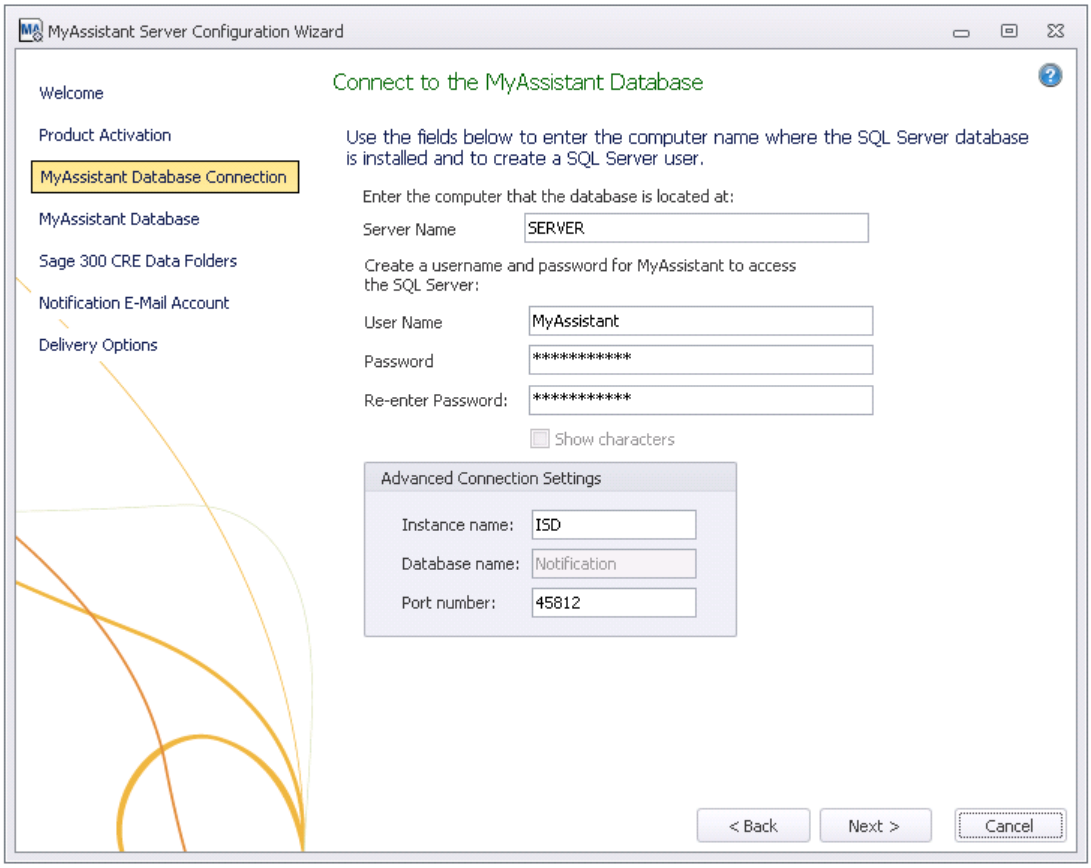
If you use a Web Proxy Server, check the box displayed under the Server Product Key field and verify that the information entered is accurate.

NOTE: The **Web Proxy Server** checkbox will only appear if you selected Show Advanced Options in the Welcome Screen (Step 1).

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.

Step 3 – Database Connection

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



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

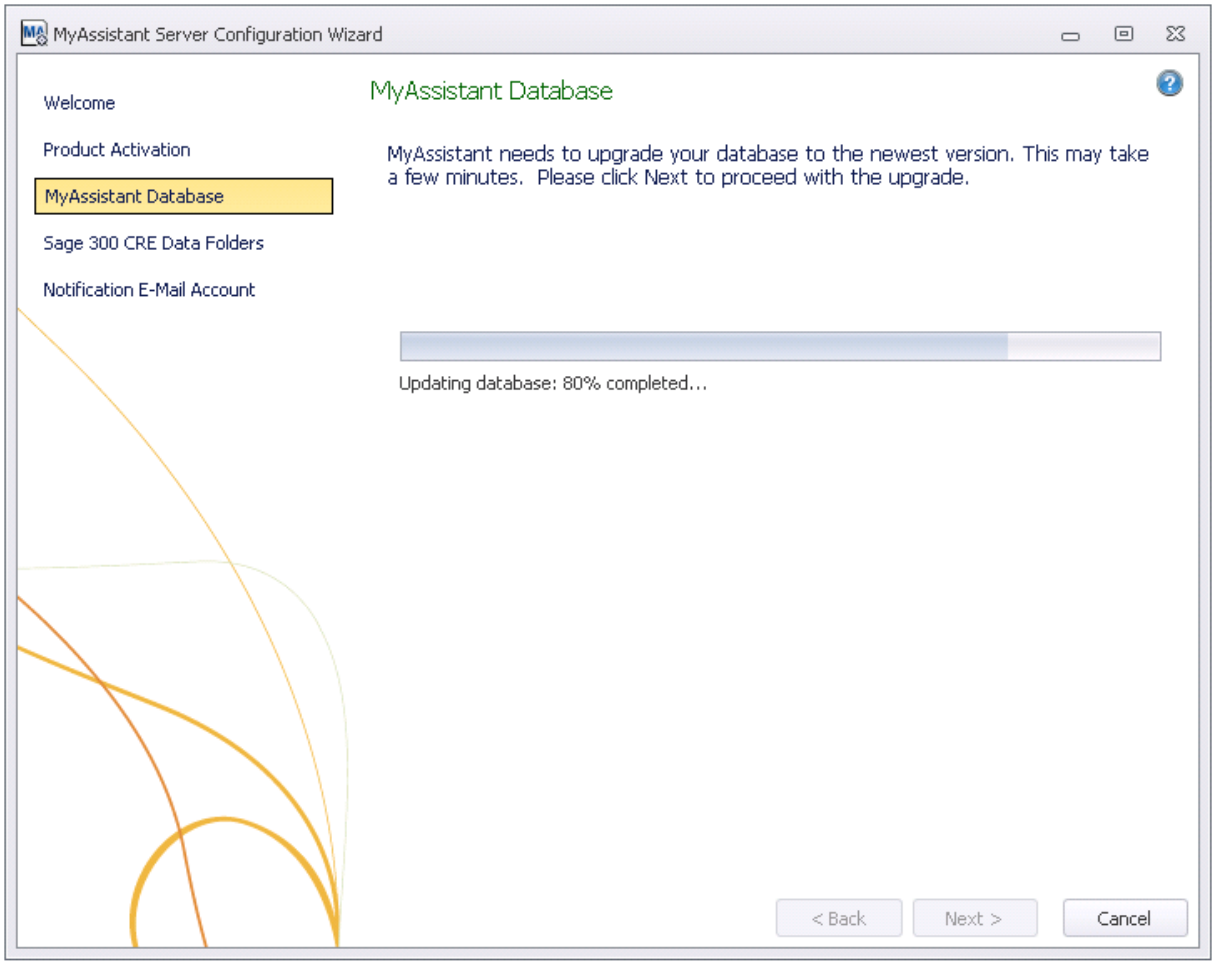
This step gives you access to the server name, SQL Server credentials, and SQL Instance and Port Number MyAssistant uses to connect to the Database.

This step will have all previously entered information prefilled.

Click [**Next**] to continue.

Step 4 – Upgrade the MyAssistant Database

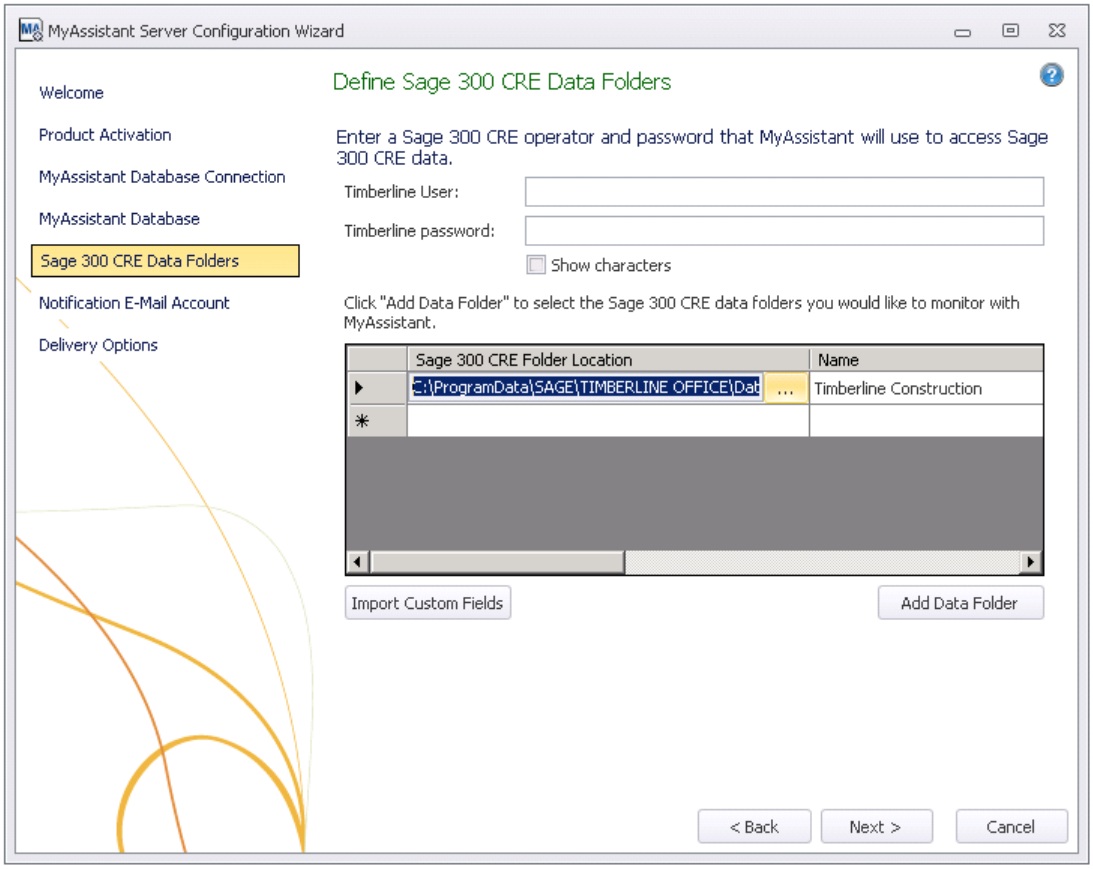
MyAssistant will perform the necessary steps to upgrade your database.



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

Step 5 – Sage 300 CRE Data Folders

Verify the information in this step is still accurate. These are the data folders MyAssistant will be able to monitor, and the Sage 300 CRE credentials MyAssistant will use to access the data.

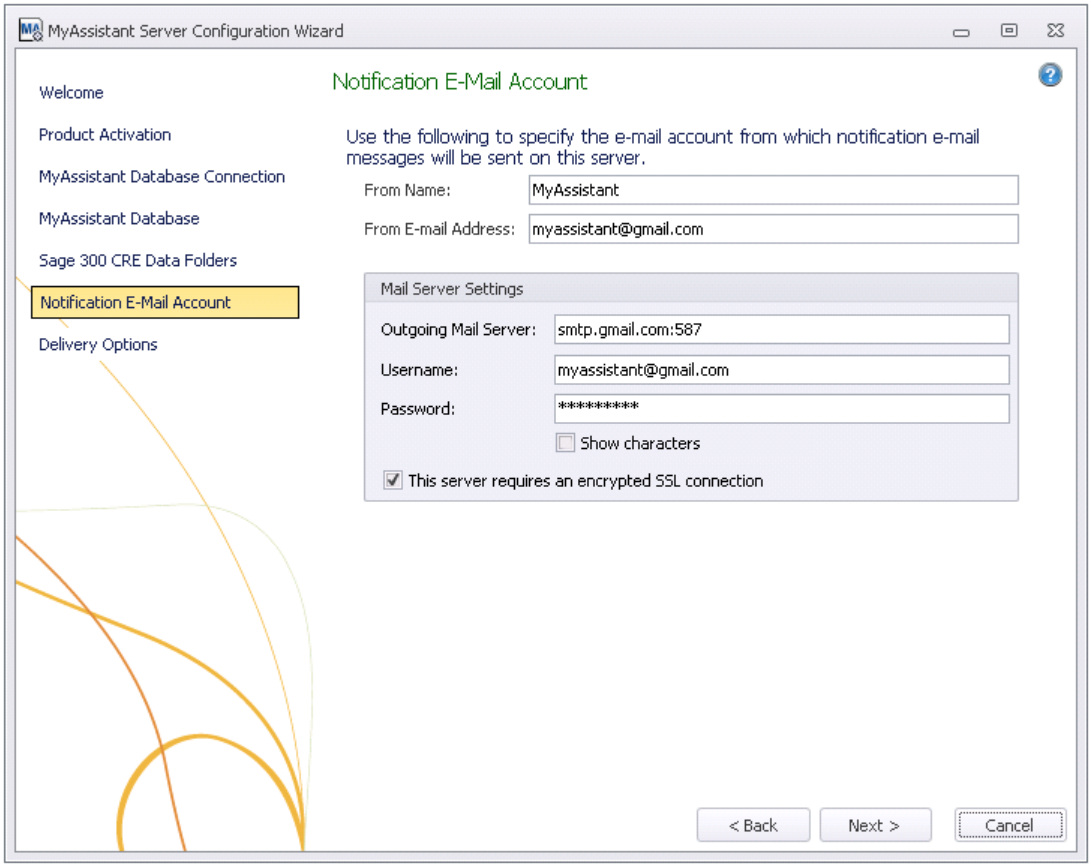


Click [**Next**] to continue. If there is more than one data folder entered, you will be prompted to select which folder you wish to have the Custom Fields imported from. If there is only one data folder specified Custom Fields will be imported automatically.

If the Sage 300 CRE 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. Changing the settings so the password never expires is recommended.

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.

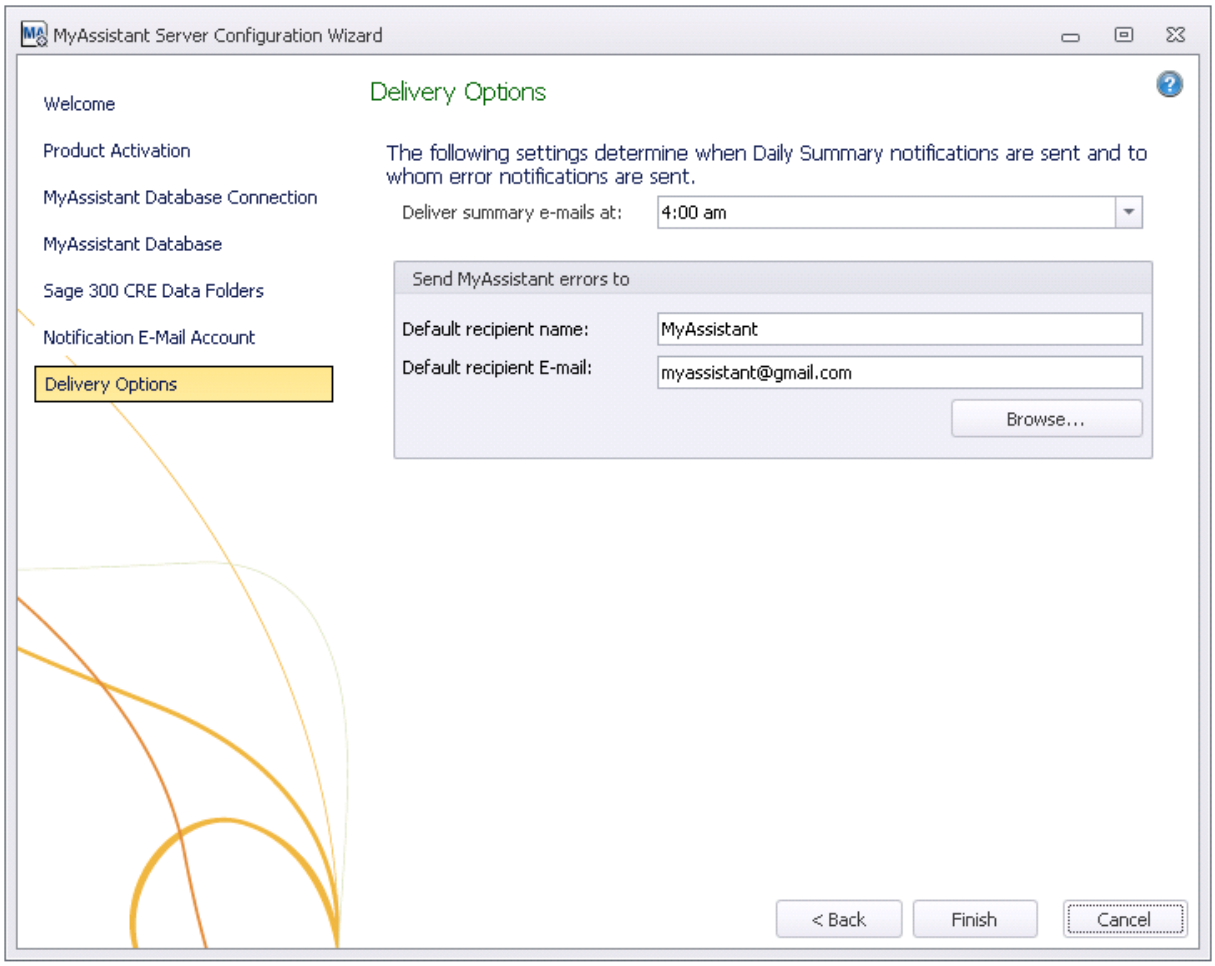


The mail server settings will show what was entered the last time the software was configured. If nothing has changed, click [**Next**].

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 daily. This way the user can act on the error in a timely manner.

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 the MyAssistant Workstation(s)

IMPORTANT: If you are upgrading a Terminal or Citrix Server, please move to Chapter 6.

Perform the following to initiate the MyAssistant Workstation upgrade.

1. Log on to your Sage 300 MyAssistant workstation with a Windows user that has Administrator or Unlimited permissions.

2. Confirm that you have closed all applications and disabled any anti-virus or Firewall software that may be running.

3. Using the link provided by Sage Software, download the MyAssistant installation files and save the .ZIP file to a folder on your machine. If accessible from the workstation, you can use the same files that were used to upgrade the MyAssistant Server. Perform the following to initiate the MyAssistant Workstation Upgrade.

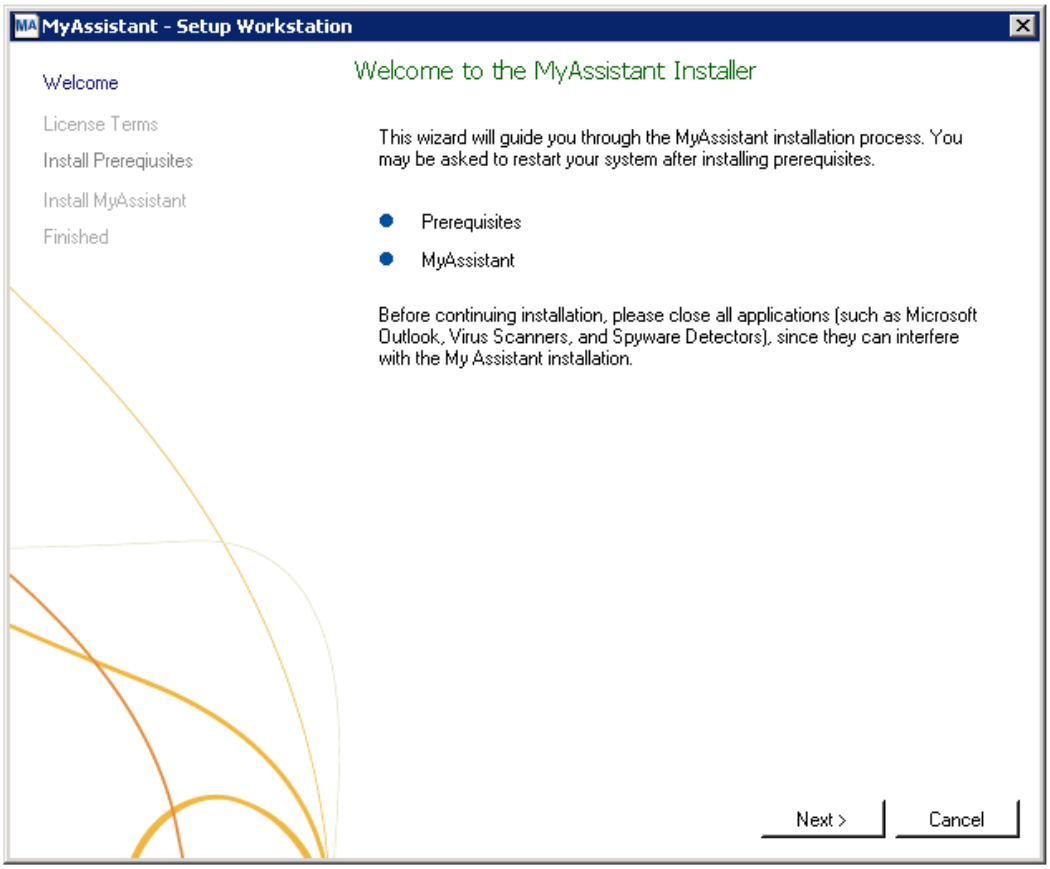
   a) Open the location of the downloaded MyAssistant Installation files.
   b) Unzip the files to a folder on the local drive on the MyAssistant Server.
   c) Open the location of the unzipped MyAssistant installation files and double click **autorun.hta**

4. The Sage 300 CRE MyAssistant Installation hub will open.

Install Workstation – Select [**Install Workstation**] to perform a MyAssistant workstation upgrade.

Step 1 – Welcome

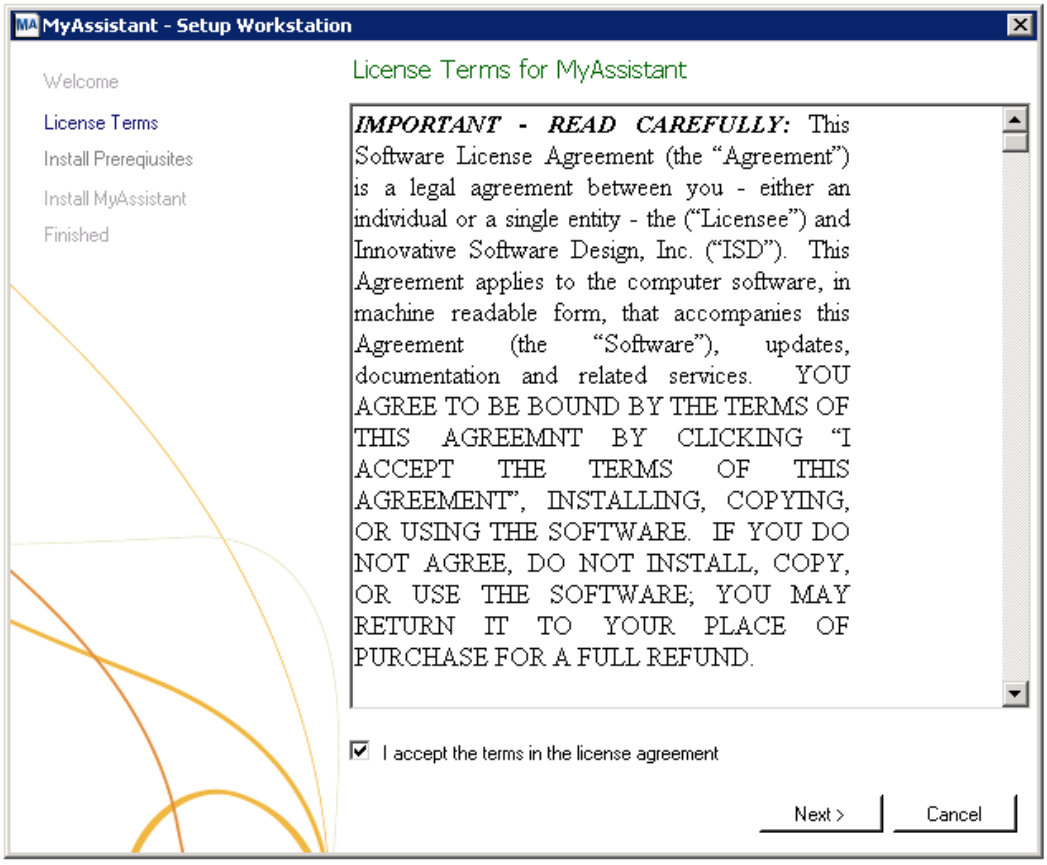
When you select **Workstation Install** on the MyAssistant splash screen, the Setup Workstation wizard will appear.



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 300 CRE MyAssistant software.



Click [**Next**] to continue.

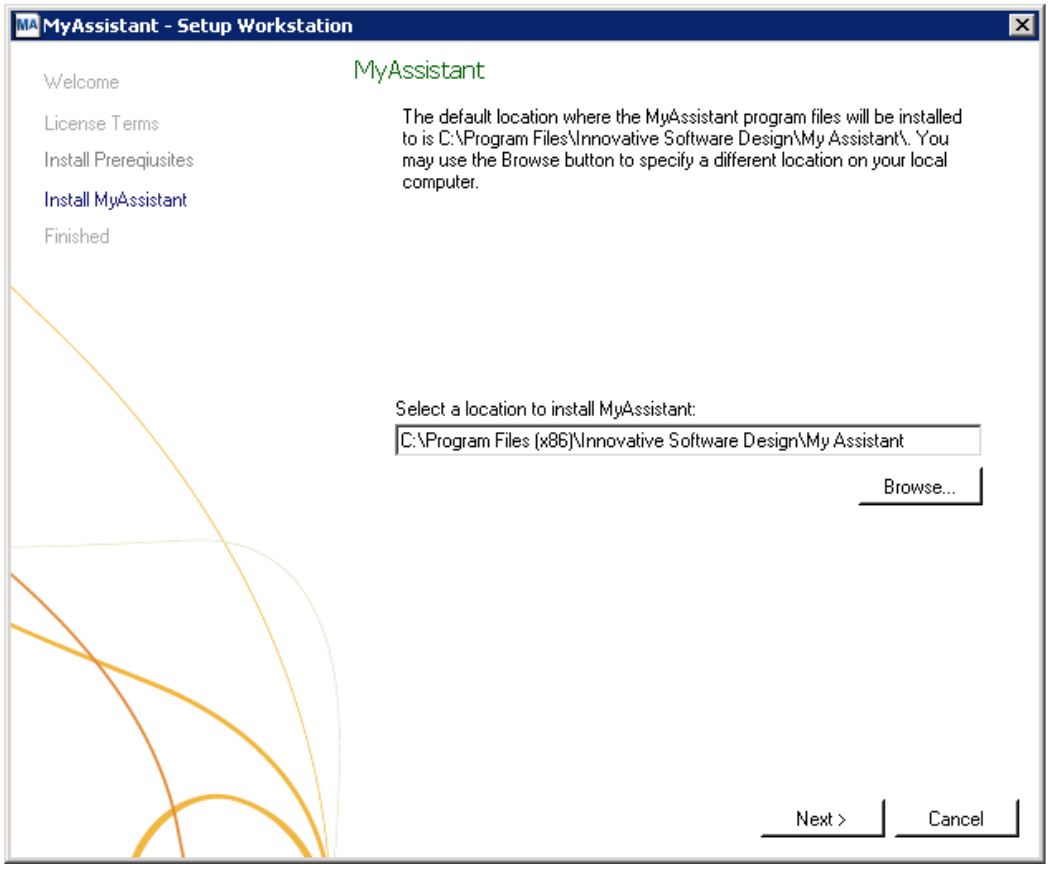
Step 3 – Prerequisites for MyAssistant Workstation

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.

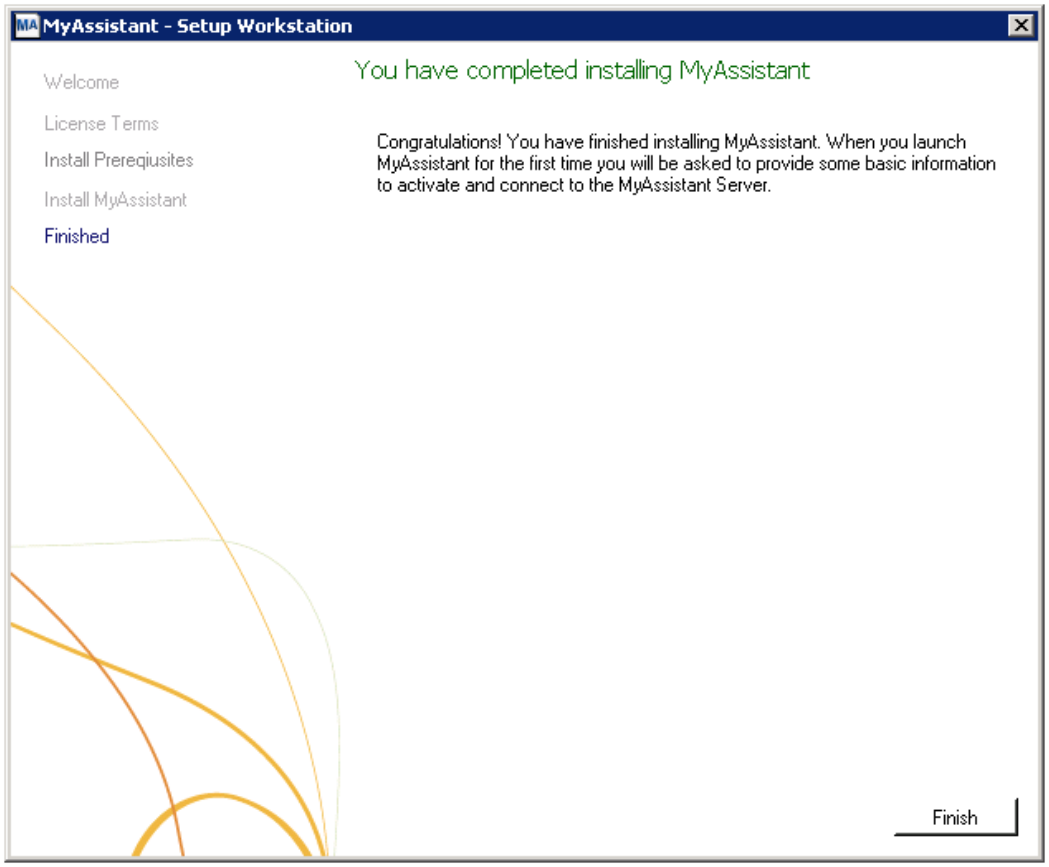
Step 4 – Install the Software

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.



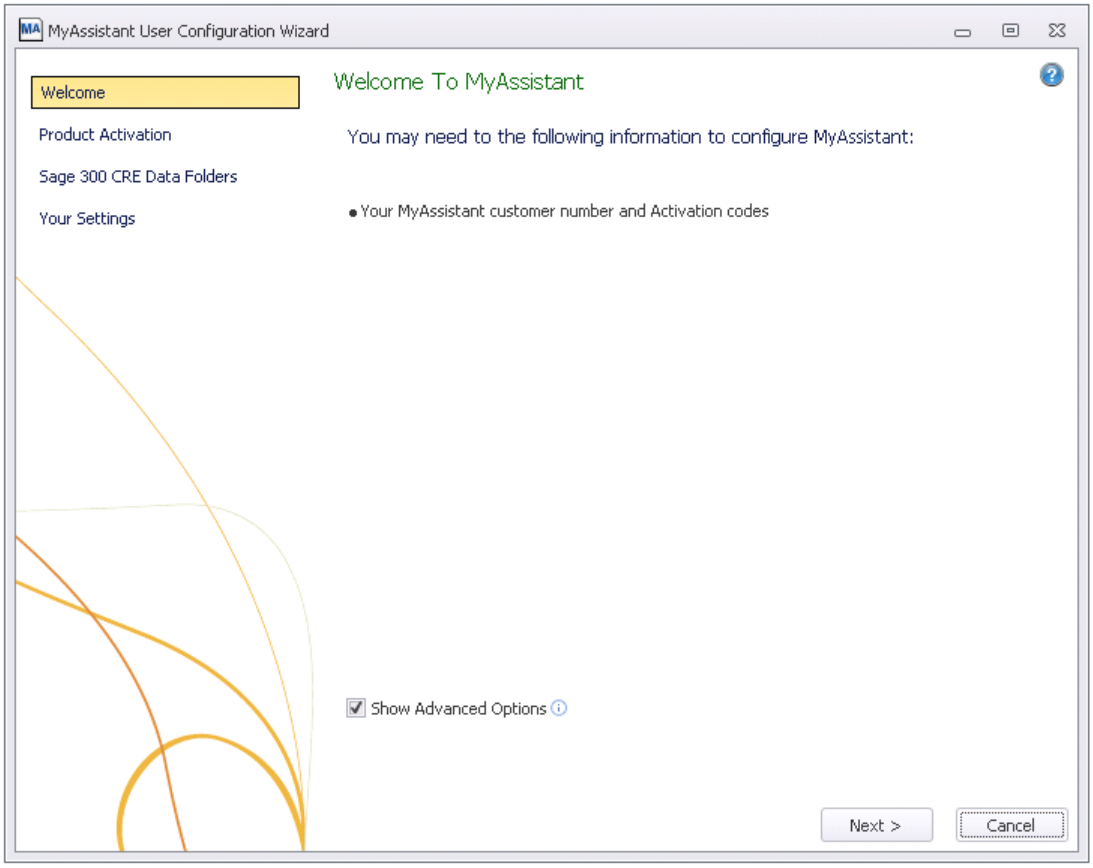
Click [**Finish**] to close the setup wizard.

Chapter 6 – MyAssistant Workstation Configuration

NOTE: Depending on a number of settings, you may *not* need to reactivate the Workstation. If this is the case, MyAssistant will open ready to use.

Step 1 – Welcome Screen

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

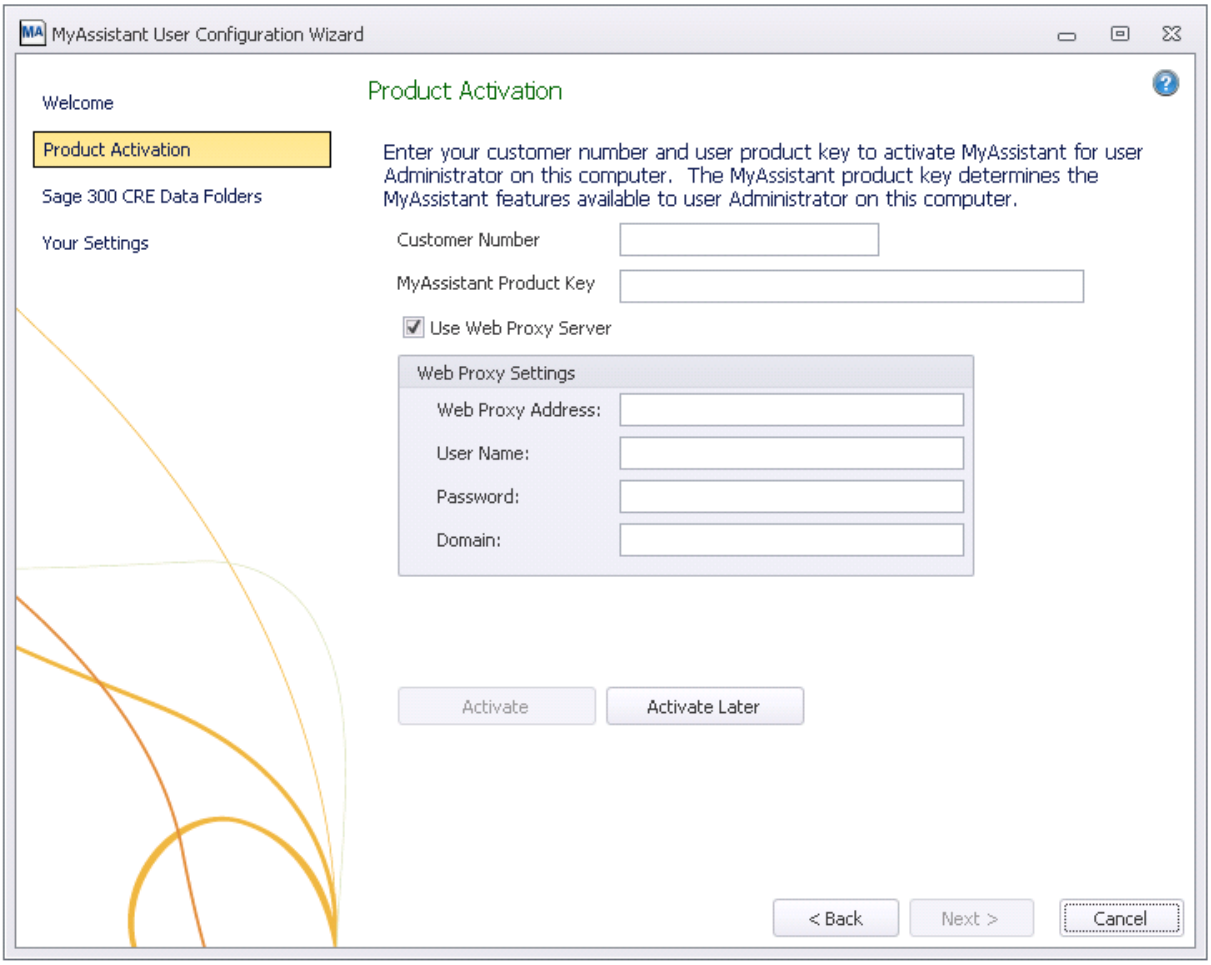


If there is not a shortcut on the desktop, follow the path below to open MyAssistant:

Open the Windows Start Menu > All Programs > MyAssistant (File) > **MyAssistant**

Step 2 – Product Activation

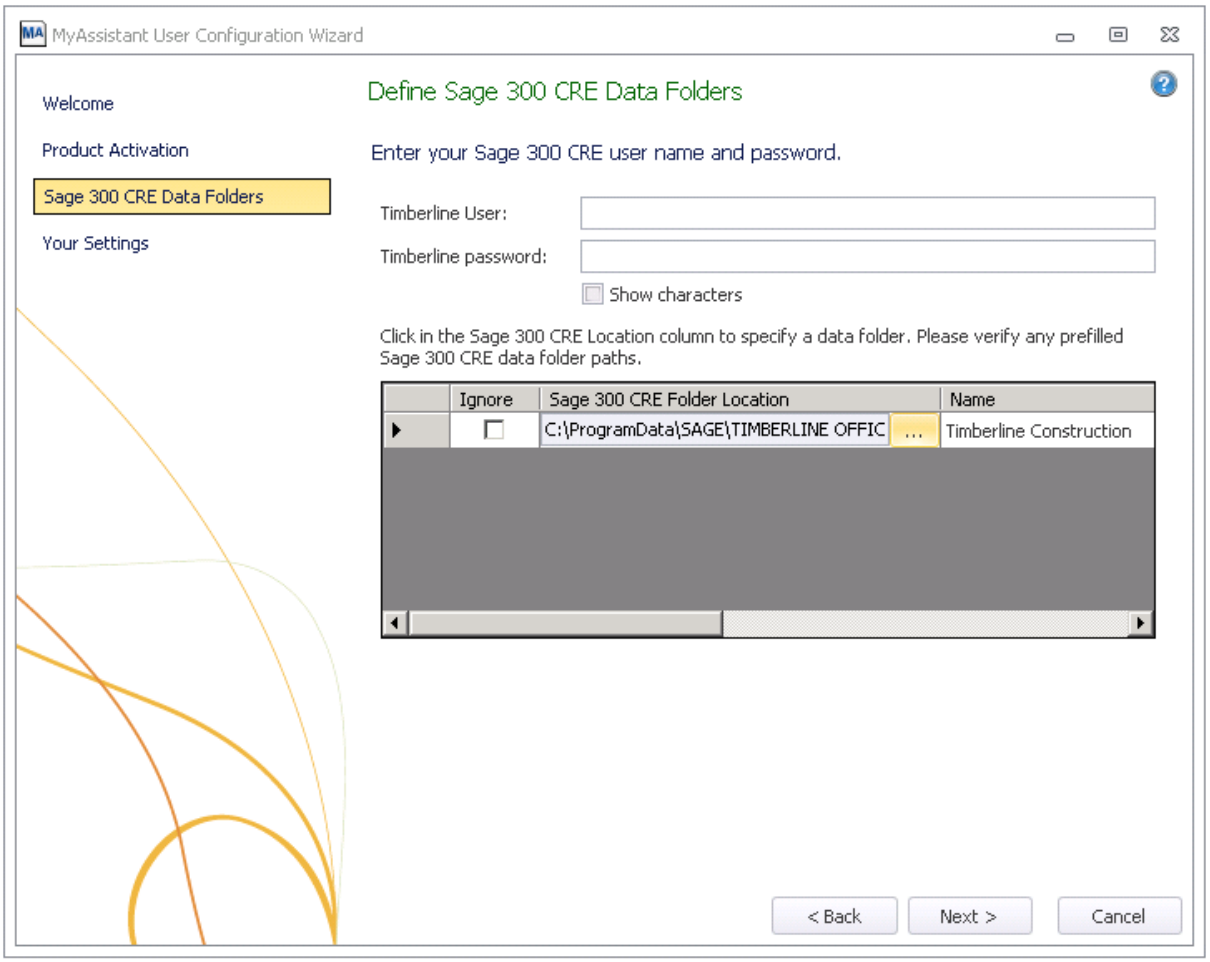
You must activate MyAssistant in order to use it. A working internet connection is required to complete this step. Your customer number and product key may already be entered. Reactivate before clicking next.



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 Sage 300 CRE Data Folder Information

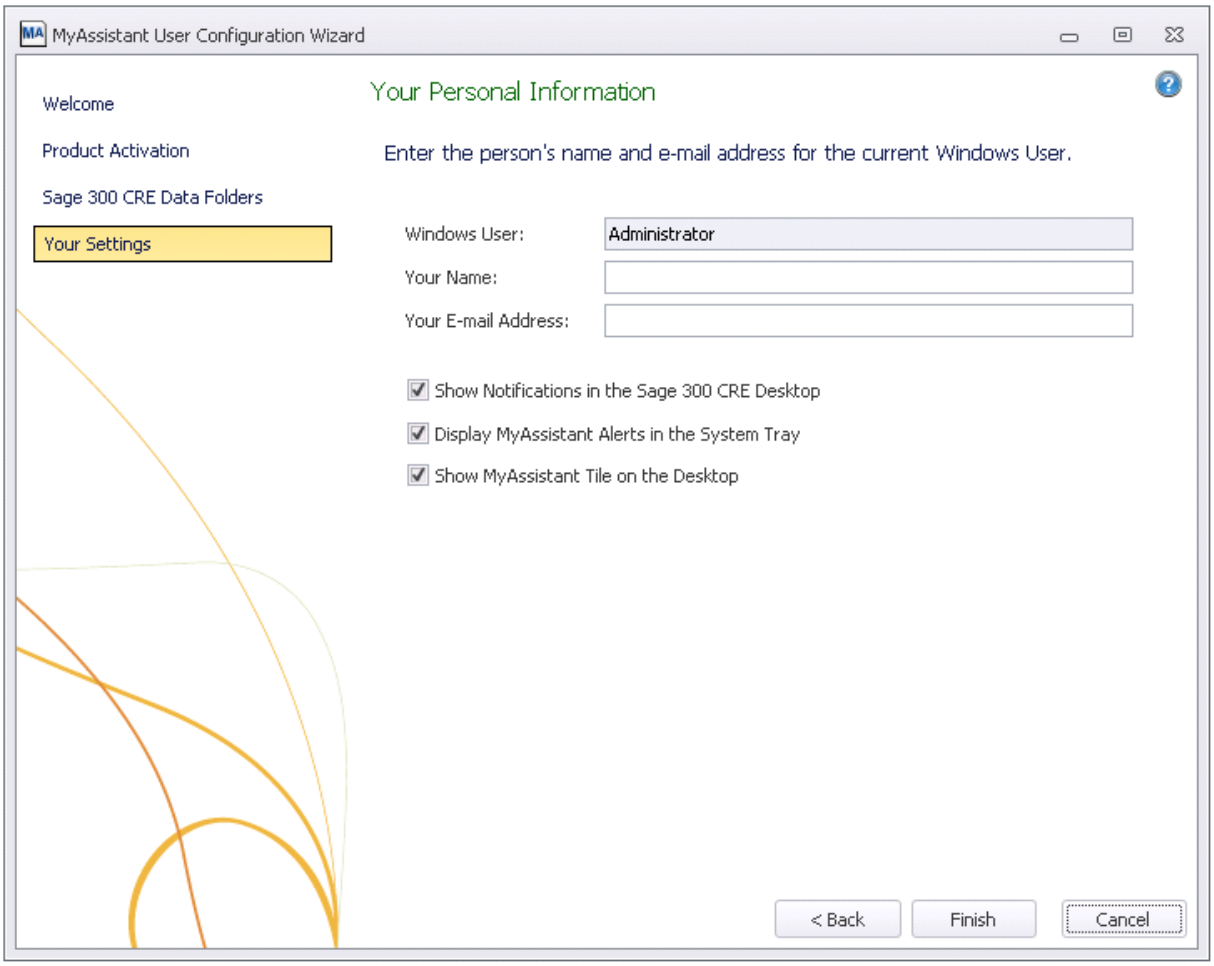
The information in this step will be prefilled. Verify that it is accurate.



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 300 CRE MyAssistant will start upon clicking **Finish** in the wizard.

Chapter 7 – Upgrading 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

Here is a list of what needs to be done to upgrade MyAssistant on a Terminal or Citrix Server:

1. Log onto the Server as a System Administrator.
2. Run the MyAssistant Server installation to upgrade.
3. Activate MyAssistant with a Server Product Key.
4. Log onto the machine with a Windows user who will run the software.
5. Open the MyAssistant user Application.
6. 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 these 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

If on Windows 2008:

- C:\Program Data
- C:\Program Files\Innovative Software Design
  OR
- C:\Program Files(x86)\Innovative Software Design

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

Upgrading the MyAssistant Server

Complete to Chapters 1 and 2 for upgrading the MyAssistant Server. When you have completed Chapter 2, return to this Chapter to activate the MyAssistant User Software on this Terminal or Citrix Server.

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 7 – Test the Upgrade

The last step in the upgrade process is to confirm that MyAssistant is working properly. Perform the following to test this:

Access Sage Timberline Office Data

1. Open the MyAssistant Designer software from a MyAssistant workstation.
2. Open an activated MyAssistant Task.
3. Move to the Email step in the Edit Task window.
4. On the right side of the window is a list of available Sage Timberline Office database records.
5. Expand the very first record.
6. Right click on the first field and select [**Browse Data**].
7. The data contained in the field should be displayed in the Browse Data window.

Troubleshooting

1. Perform the following if data is not displayed in the Browse window.
   a. Select File > [**Options**] to open the Options window.
   b. Move to the Timberline Data Folder step.
   c. Click [**Test Connection**] to confirm that the Timberline Office credentials entered are able to access the Timberline data. If the test fails, enter updated credentials.
2. Contact support if an error is displayed when browsing data

Run Tasks and Receive Email Messages

1. Open the MyAssistant software from a MyAssistant workstation.
2. Browse to an activated Task. If possible, select a Task with an attached Crystal Report that is being sent to you (edit the recipient list as needed).
3. Right click on the Task and click [**Run and Send**].

Troubleshooting

1. The Task run doesn't finish
   a. Log onto the MyAssistant Server.
   b. Open the Windows Services window (Start > Run > type: **Services.msc**).
   c. Look for the ISDAdminTask and ISDAdminSender services. Confirm both are started.

2. Email not received
   a. Open the Windows Services window (Start > Run > type: **Services.msc**).
   b. Look for the ISDAdminSenderService. Right click on the service and select [**Properties**].
   c. Click the [**Log On**] tab.
   d. Select [**This account**] and enter a Windows user that is associated with a person who is an administrator in Sage Timberline Office.
   e. Click [**OK**] and then restart the Service.

3. Report not attached to email
   a. Perform the steps outline for # 2 above.

Conclusion

This completes the upgrade of the Sage 300 CRE 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.