

# Sage 300 Construction and Real Estate

# ice software software the softw (formerly Sage Timberline Office)

**MyAssistant Upgrade Guide** 

Version 12.1



#### NOTICE

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# **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].



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

# 2

**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.

GL SQLCMD	_ D ×
Microsoft Windows [Version 6.0.6002] Copyright (c) 2006 Microsoft Corporation. All rights reserved.	
C:\  sers\Administrator}SQLCMD -E -S .\isd 1> _	
	-

- 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.

💽 SQLCMD	<
Microsoft Windows [Version 6.0.6002] 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\MyAssist	
ant 3-16-12.bak' 2>_	
	-I

- 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.

💽 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\MyAssist ant_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/se c). 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 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.

MyAssistant - Setup Server		×
Welcome	License Terms for MyAssistant Server	
License Terms	IMPORTANT - READ CAREFULLY: This	▲
Install Prerequisites	Software License Agreement (the "Agreement")	
Install MyAssistant	is a legal agreement between you - either an	
Finished	individual or a single entity - the ("Licensee") and Innovative Software Design, Inc. ("ISD"). This	
	Agreement applies to the computer software, in	
	machine readable form, that accompanies this	
	Agreement (the "Software"), updates,	
	documentation and related services. YOU	
	AGREE TO BE BOUND BY THE TERMS OF	
	THIS AGREEMNT BY CLICKING "I	
	ACCEPT THE TERMS OF THIS	
	OR USING THE SOFTWARE TE VOIL DO	
	NOT AGREE DO NOT INSTALL COPY	
$\land$	OR USE THE SOFTWARE: YOU MAY	
	RETURN IT TO YOUR PLACE OF	
	PURCHASE FOR A FULL REFUND.	
		-
	I accept the terms in the license agreement	
		1
	Next>	Cancel

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.

MAMyAssistant - Setup Server	
Welcome	MyAssistant Server
License Terms	The default location where the MyAssistant program files will be installed to in CABrogram Electronovative Software Design/Mul/Assistant/ You
Install Prerequisites	may use the Browse button to specify a different location on your local
Install MyAssistant	computer.
Finished	
	Select a location to install MyAssistant: C:\Program Files (x86)\Innovative Software Design\My Assistant
	Browse
	Next > Cancel

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**.

MyAssistant Server Configuration Wiz	ard	-	۰	23
Welcome	Welcome To The MyAssistant Server			2
Product Activation	You may need the following information to configure the MyAssistant Server:			
MyAssistant Database Connection				
MyAssistant Database	Your MyAssistant customer number and Activation codes			
Sage 300 CRE Data Folders	• The Windows password for the Administrator user.			
Notification E-Mail Account				
Delivery Options	• A Sage 300 CRE Operator ID and password that MyAssistant will use to access Sage 300 CRE data.			
	• The email account which MyAssistant will use to send email messages.			
	Show Advanced Options ①			
	Next >		Cance	!

#### 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.

MyAssistant Server Configuration W	izard		۰	23
Welcome	Product Activation			?
Product Activation	Enter your customer number and server product key to activate MyAssis	tant :	Serve	r.
MyAssistant Database Connection	Customer Number			
MyAssistant Database	Server Product Key			
Sage 300 CRE Data Folders	☑ Use Web Proxy Server			
Notification E-Mail Account	Web Proxy Settings			
Delivery Options	Web Proxy Address:			
	User Name:			
	Password:			
	Domain:			
$\mathbf{k}$				
	Activate			
	<back next=""></back>	[	Cance	

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.

Ŀ	NyAssistant Server Configuration Wiz	ard				۰	23
	Welcome	Connect to the MyA	Assistant Database				2
	Product Activation Use the fields below to enter the computer name where the SQL So is installed and to create a SQL Server user.						
	MyAssistant Database Connection	Enter the computer th	at the database is located at:				
	MyAssistant Database	Server Name	SERVER				
	Sage 300 CRE Data Folders	Create a username an the SQL Server:	d password for MyAssistant to a	access			
	Notification E-Mail Account	User Name	MyAssistant				
	Delivery Options	Password	****				
		Re-enter Password:	****				
			Show characters				
	$\langle \rangle$	Advanced Connection	on Settings				
		Instance name:	ISD				
		Database name:	Notification				
		Port number:	45812				
	$\langle \rangle$		< B.	ack Nex	t > [	Cance	

**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.

MyAssistant Server Configuration Wi	zard	-	٥	23
Welcome	MyAssistant Database			?
Product Activation MyAssistant Database	MyAssistant needs to upgrade your database to the newest version. The a few minutes. Please click Next to proceed with the upgrade.	nis may	take	
Sage 300 CRE Data Folders				
Notification E-Mail Account				
	Updating database: 80% completed			
	< Back Next >		Cancel	

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.

MyAssistant Server Configuration Wiz	ard			0		23
Welcome	Define Sage 300 CF	RE Data Folders				?
Product Activation	Enter a Sage 300 CRE 300 CRE data.	operator and password that My	Assistant will use to	) acces	ss Sag	je
MyAssistant Database Connection	Timberline User:					
MyAssistant Database	Timberline password:					
Sage 300 CRE Data Folders		Show characters				
Notification E-Mail Account	Click "Add Data Folder" to MyAssistant.	o select the Sage 300 CRE data fold	ers you would like to m	onitor	with	
Delivery Options	Sage 300 CRE	Folder Location	Name			
	C:\ProgramData	a\SAGE\TIMBERLINE OFFICE\Dat	Timberline Constru	uction		
	*					
Welcome   Product Activation   MyAssistant Database Connection   MyAssistant Database   Sage 300 CRE Data Folders   Notification E-Mail Account   Delivery Options     Sage 300 CRE Folder Location     Sage 300 CRE Folder Location     Import Custom Fields     Import Custom Fields						
Welcome       Define Sage 300 CRE Data Folders         Product Activation       Enter a Sage 300 CRE operator and password that MyAssistant will use to access Sage 300 CRE data.         MyAssistant Database       Timberline User:         MyAssistant Database       Timberline user:         MyAssistant Database       Show characters         Notification E-Mail Account       Click "Add Data Folder" to select the Sage 300 CRE data folders you would like to monitor with MyAssistant.         Delivery Options       Sage 300 CRE Folder Location         Name       Import Custom Fields         Add Data Folder       Add Data Folder         Import Custom Fields       Add Data Folder         Cancel       Cancel						
MyAssistant Server Configuration Wizard Image: Configuration Wizard     Welcome Define: Sage: 300 CRE: Data Folders   Product Activation   MyAssistant Database Enter a Sage: 300 CRE: operator and password that MyAssistant will use to access Sage: 300 CRE: data.   MyAssistant Database Timberline User:   Timberline User: Image: 300 CRE: operator   Sage: 300 CRE: Data Folders Click "Add Data Folder" to select the Sage: 300 CRE: data folders you would like to monitor with MyAssistant.   Delivery Options Sage: 300 CRE: Folder Location   Notification E-Mail Account Sage: 300 CRE: Folder Location   Delivery Options Sage: 300 CRE: Folder Location   MyAssistant. Import Custom Fields     Import Custom Fields Add Data Folder						
		< Back	Next >		Cancel	

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.

MyAssistant Server Configuration Wi	zard		- C	Ð	23
Welcome	Notification E-Mail Ac	ccount			2
Product Activation	Use the following to s messages will be sent	pecify the e-mail account from which notification e-r on this server.	hail		
MyAssistant Database Connection	From Name:	MyAssistant			
MyAssistant Database	From E-mail Address:	myassistant@gmail.com			
Sage 300 CRE Data Folders	Meil Commun Cabliana				
Notification E-Mail Account	Mail Server Settings				
Delivery Options	Outgoing Mail Server	smtp.gmail.com:58/			
	Username:	myassistant@gmail.com			
	Password:	Show characters			
	📝 This server requi	res an encrypted SSL connection			
		< Back Next >	Can	icel	

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.

MyAssistant Server Configuration Wizard				•	23
Welcome D	elivery Options				2
Product Activation	The following settings dete whom error notifications are	rmine when Daily Summary notific e sent.	cations are sent a	nd to	
MyAssistant Database Connection	Deliver summary e-mails at:	4:00 am		•	
Sage 300 CRE Data Folders	Send MyAssistant errors to				
Notification E-Mail Account	Default recipient name:	MyAssistant			
Delivery Options	Default recipient E-mail:	myassistant@gmail.com			
			Browse		
					,
		< Back	Finish	Cancel	

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.

🔤 MyAssistant - Setup Workstatio	n	×
Welcome	Welcome to the MyAssistant Installer	
License Terms Install Preregiusites	This wizard will guide you through the MyAssistant installation process. You may be asked to restart your system after installing prerequisites.	
Install MyAssistant	Prerequisites	
Finished	<ul> <li>MyAssistant</li> </ul>	
	Before continuing installation, please close all applications (such as Microsoft Outlook, Virus Scanners, and Spyware Detectors), since they can interfere with the My Assistant installation.	
	Next > Cancel	

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.

MyAssistant - Setup Workstatio	n	×
Welcome	License Terms for MyAssistant	
License Terms	IMPORTANT - READ CAREFULLY: This	<b>_</b>
Install Preregiusites	Software License Agreement (the "Agreement")	
Install MyAssistant	is a legal agreement between you - either an	
Finished	individual or a single entity - the ("Licensee") and Innovative Software Design, Inc. ("ISD"). This	
	Agreement applies to the computer software, in	
	machine readable form, that accompanies this	
	Agreement (the "Software"), updates,	
	documentation and related services. YOU	
	AGREE TO BE BOUND BY THE TERMS OF	
	THIS AGREEMINT BY CLICKING T	
	ACCEPT THE TERMS OF THIS ACCEPT THE TERMS	
	OR USING THE SOFTWARE IF YOU DO	
	NOT AGREE. DO NOT INSTALL. COPY.	
$\land$	OR USE THE SOFTWARE; YOU MAY	
	RETURN IT TO YOUR PLACE OF	
	PURCHASE FOR A FULL REFUND.	
		•
	I accept the terms in the license agreement	
	Next >	Cancel

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.

MyAssistant - Setup Workstation		×
Welcome	MyAssistant	
License Terms	The default location where the MyAssistant program files will be installed to is CAProgram FilesApprovative Software Design/Mul Assistant/ You	
Install Preregiusites	may use the Browse button to specify a different location on your local	
Install MyAssistant	computer.	
Finished		
	Select a location to install MyAssistant: C:\Program Files (x86)\Innovative Software Design\My Assistant	
	Browse	
	Next > Cancel	

#### Step 5 – You Have completed Installing MyAssistant

Congratulations. MyAssistant has successfully been upgraded on this machine.

MA MyAssistant - Setup Workstati	ion 🔰
Welcome	You have completed installing MyAssistant
License Terms	
Install Preregiusites	Division           You have completed installing MyAssistant           Congratulations! You have finished installing MyAssistant. When you launch           MyAssistant for the first time you will be asked to provide some basic informatic           to activate and connect to the MyAssistant Server.
Install MyAssistant	to activate and connect to the MyAssistant Server.
Finished	You have completed installing MyAssistant. Congratulations! You have finished installing MyAssistant. When you launch MyAssistant for the first time you will be asked to provide some basic informa- to activate and connect to the MyAssistant Server.
	Finish

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.

MyAssistant User Configuration Wizar	4	-	٥	23
Welcome	Welcome To MyAssistant			?
Product Activation	You may need to the following information to configure MyAssistant:			
Sage 300 CRE Data Folders				
Your Settings	Your MyAssistant customer number and Activation codes			
	✓ Show Advanced Options ① Next >		Cance	

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.

MyAssistant User Configuration Wiza	rd	0		23
Welcome	Product Activation			2
Product Activation Sage 300 CRE Data Folders	Enter your customer number and user product key to activate MyA Administrator on this computer. The MyAssistant product key dete MyAssistant features available to user Administrator on this compute	ssistant fo ermines the er.	r user e	
Your Settings	Customer Number			
	MyAssistant Product Key			
	✓ Use Web Proxy Server			
	Web Proxy Settings			
	Web Proxy Address:			
	User Name:			
	Password:			
	Domain:			
	Activate Activate Later	The second se	Cance	

**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.

MyAssistant User Configuration Wizar	d	0	▣	23
Welcome	Define Sage 300 CRE Data Folders			2
Product Activation	Enter your Sage 300 CRE user name and password.			
Sage 300 CRE Data Folders	Timberline User:			
Your Settings	Timberline password:			
	Show characters Click in the Sage 300 CRE Location column to specify a data folder. Please verify an Sage 300 CRE data folder paths.	ıy prefil	lled	
	Ignore Sage 300 CRE Folder Location Name			
	< Back Next >		Cancel	

Click [Next] if all information is correct.

#### Step 4 – User Profile

MyAssistant User Configuration Wiza	ard			▣	S
Welcome	Your Personal Inform	nation			3
Product Activation	Enter the person's nam	ne and e-mail address for the current Windows U	ser.		
Sage 300 CRE Data Folders					
Your Settings	Windows User:	Administrator			
	Your Name:				
	Your E-mail Address:				
$\mathbf{i}$	Show Notifications in	the Sage 300 CRF Deskton			
	Display MyAssistant	Alerts in the System Tray			
	Show MyAssistant	ile on the Desiston			
$\langle \rangle$	Drow HyAssistant II	le off the besitup			
$\mathbf{X}$					
		< Back Finish		Cance	1

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.