

**Sage 300**

Construction and Real Estate

# **Sage 300 Construction and Real Estate**

**MyAssistant Quick Start and  
Installation Guide  
Version 22.1**



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# MyAssistant Installation Quick Start

This is a brief outline of the steps for installing and configuring Sage MyAssistant. For detailed step-by-step instructions, see the MyAssistant Installation Guide beginning on Page 6

This process consists of:

- Server Installation
- Server Configuration
- Workstation Installation (optional)\*
- Workstation Configuration

*\*MyAssistant Workstation installation is only needed if installing on a different machine than the MyAssistant Server*

## Step 1: MyAssistant Server Installation

- Identify where to install the MyAssistant Server:** The MyAssistant Server software can be installed on any machine (including the Sage server) that meets the requirements outlined in the “Hardware and Software Compatibility” section at the end of this document.
- Determine the MyAssistant version to install:** The first two digits of the MyAssistant software version must match the first two digits of the installed version of Sage 300 CRE. When possible, make sure the number after the “.” in the MyAssistant version is equal to or greater than its counterpart in the Sage version.
- Log on with an Administrator-level Windows user:** Log on to the above machine with a Windows user with Administrator-level privileges to install the MyAssistant software.
- Download the install files:** Download & unzip the MyAssistant install files from the Sage Customer portal (where you download the Sage 300 install files). Best practice is to place the install files in a shared location accessible via a UNC path (these install files will also be used to install workstations).
- Open “autorun.hta” to start the installation process:** Open “autorun.hta” in the MyAssistant install files and select the “Setup Server” option
- Install prerequisites:** Part of the installation wizard will automatically install any needed prerequisite software, including Microsoft SQL Server 2019 Express.
  - If you have any other versions of SQL on your server, check to see if they’re compatible with SQL Server 2019 Express
  - You can skip the SQL installation if have a full version of SQL Server (e.g. Standard or Enterprise edition) that you’ll use to store the MyAssistant database.
- Pick program files location:** MyAssistant’s program files can be installed on any drive on the server.

## Step 2: MyAssistant Server Configuration

**NOTE:** All configuration settings can be changed at a later time except the selected prebuilt Tasks

- a. **Start the Configuration:** The MyAssistant Server software must be configured after installing. Click “Yes” when prompted to configure, or use the “MyAssistant Configuration Manager” icon on the desktop
- b. **Activate the MyAssistant Server:** Enter the Sage Customer # and MyAssistant Server Product Key in the Sage Customer Portal (where you find your Sage activation codes).
- c. **Choose prebuilt “Tasks”:** MyAssistant includes prebuilt processes called “Tasks” that customers can use to quickly start sending information. This step has you choose which prebuilt Tasks you want set up based on your company’s primary line of business.
  - MyAssistant Prebuilt Task Lists can be found with the install files in the “Documents” folder
  - Tasks from the list not selected can be set up manually later
- d. **Sage User & Password:** Enter a Sage user name and password that MyAssistant will use to access information in Sage.
  - The Sage user should have sufficient permissions to the information in Sage you want to access with MyAssistant
  - Best practice is to use an “Application Administrator”- level account in Sage
  - Choose a user whose password is set to never expire
- e. **Choose Sage Data folder(s):** Use the Add Data Folder button to specify which Sage data folders MyAssistant will monitor
- f. **Set up “From” Email Address(es):** MyAssistant sends information & reports via email. Enter outgoing mail server, port, email address, user name & password for the email account MyAssistant will send from.
  - Outlook is not needed on the server
  - Multiple “From” accounts can be set up – you can then specify on a Task which to use

## Step 3: MyAssistant Designer Installation

- a. **Identify who will use the MyAssistant Designer and on what machine:** Each MyAssistant Designer license is tied to a Windows user on a given computer. Determine who will be using MyAssistant Designer to set up “Tasks”
  - If you will use the MyAssistant workstation on the same computer where the MyAssistant Server was installed, skip this step and go to Step 4
- b. **Log on as the Windows user who will use MyAssistant**
- c. **Open “autorun.hta”:** Open “autorun.hta” in the MyAssistant install files folder and select “Setup Workstation”
- d. **Pick program files location:** MyAssistant’s program files can be installed on any drive on the server.

## Step 4: MyAssistant Designer Configuration

- a. **Start the Configuration:** Double-click the MyAssistant icon on the desktop. The first time the software opens you'll be prompted to configure the workstation.
- b. **Activate the software:** Enter the Sage Customer # and MyAssistant Designer Product Key provided in the Sage Customer Portal where you find your Sage activation codes.
- c. **Connect to the database:** Enter the name of the server where the MyAssistant server is installed.
  - a. If MyAssistant automatically connects, this step will be skipped.
- d. **Enter Sage User & Password:** Enter the Sage user name and password for the person who is using the MyAssistant Designer.
- e. **Confirm the Sage Data Folder paths:** Make sure all paths are entered and accurate.
- f. **Finish the Configuration:** Enter the name and email address of the person using the MyAssistant Designer
- g. **Test the software:** Test MyAssistant's ability to run Tasks and send emails by activating a Task, typing your email address in the "To" line, and sending yourself an email. Detailed steps can be found on page 39.

# MyAssistant Installation Guide

You will perform the following to install Sage 300 CRE MyAssistant 22.1:

1. Install the MyAssistant Server software on your Sage 300 CRE Server.
2. Complete the MyAssistant Configuration Wizard
3. Install MyAssistant on the desktop computers or Terminal/Citrix Servers where MyAssistant will be used.
4. Activate and configure the MyAssistant software for person that will use MyAssistant.

Installing and configuring the MyAssistant server should take approximately 1 hour. Installing each MyAssistant workstation should take approximately 10 minutes.

Please refer to the Frequently Asked Questions section at the end of the Install guide for answers to common installation and configuration questions.

**CAUTION:** If you are upgrading from a previous version of MyAssistant, please refer to the **MyAssistant Upgrade Guide** for upgrade instructions. Please contact Sage Support if you need a copy of the Sage 300 MyAssistant Upgrade Guide.



## Before You Install

Use the following to ensure the MyAssistant installation & setup is as efficient as possible:

1. Identify where the MyAssistant Server software will be installed. The MyAssistant Server software can be installed on any computer with a Sage 300 CRE workstation installed, but installing it on the Sage 300 server is recommended.
2. Confirm the above computer will be left on at all times and meets the Sage 300 CRE MyAssistant Hardware & Software requirements.
3. Identify a Sage 300 CRE user and password MyAssistant will use to access Sage data. This user should have sufficient security privileges to access the Sage 300 CRE data you want MyAssistant to monitor, and have a password set to never expire.
4. Select the email addresses from which MyAssistant will send emails. You will need the name or IP address for the outgoing mail server, as well as any usernames and passwords required by the mail server.
5. Identify the computers (i.e. desktops or Citrix/Terminal servers) where a MyAssistant Workstation install will need to be performed. A MyAssistant Workstation install needs to be performed on machines (other than the MA Server) where users will be setting up Tasks, viewing Sage information via Live Tile, running MyAssistant Tasks and/or working with their Notifications in the Sage Desktop.
6. If your network is monitored by a proxy server, you will need to provide a proxy server user and password to activate MyAssistant.

### NOTE:

7. Verify you can start a Sage 300 CRE program (e.g. Job Cost) on each computer where MyAssistant will be installed (including the MyAssistant Server machine).
8. If you use Sage Service Management, open Service Management and run a report to ensure that an ODBC connection to the SM database has been established.
9. Ensure the latest Microsoft Windows and Microsoft Office updates have been installed, including on the server. We recommend installing all High Priority updates at a minimum.
10. Confirm that Windows User Access Control (UAC) is turned off on ALL machines where MyAssistant will be installed. UAC can be turned off by performing the following:
  - Open the Windows registry and navigate to the following path:  
HKEY\_LOCAL\_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\System
  - Double click on "EnableLUA" and change the value to "0", then click "OK"
  - Reboot the computer

UAC needs to remain off on any machine where the MyAssistant Server is installed. This includes when the MyAssistant Server is installed on the Terminal/Citrix server.

**IMPORTANT:** Turn off any antivirus and firewall software on the server where the MyAssistant Server software will be installed. It can be turned on again after the MyAssistant Server software is installed and

configured, but exceptions will need to be added (see Chapter 5 for more details).

11. Sage 300 CRE MyAssistant installs the following software:

- Microsoft SQL Server 2019 Express (On the Server Only)
- Sage 300 CRE MyAssistant software

Removing any of the above will disable the Sage 300 CRE MyAssistant software.

**IMPORTANT:** Confirm that the Windows users installing and configuring MyAssistant have access to the following locations:

- On the MyAssistant Server: Access to Program Files, Program Data, and can write to the Local Machine hive of the Windows Registry.
- On a MyAssistant Workstation: Access to Program Files, Program Data, and can write to the Current User hive of the Windows Registry.

## MyAssistant Product Keys/Licenses

Each MyAssistant license is tied to a Windows User on a specified machine. This means that when a license is installed, each user will need to activate the software. This applies to MyAssistant on standalone workstations, Citrix or Terminal Servers.

**The MyAssistant Product Key determines the features available to each user:**

- The **MyAssistant Server product key** is for activating the MyAssistant Server.
- The **MyAssistant Designer product key** provides access to setup features such as creating and scheduling MyAssistant Tasks and defining security. This key provides all of the functionality of the MyAssistant application.
- The **MyAssistant product key** allows users to run Tasks and send emails via the MyAssistant application, as well as view and work with Notifications using the Sage Desktop and MyAssistant Live Tile.

## Hardware and Software Compatibility

### Minimum Hardware Requirements

The following are the minimum hardware requirements for Sage 300 CRE MyAssistant 22.1.

MyAssistant Workstation Installation

- 2 GB of available memory
- 1 GB of available disk space
- Video card capable of 1024 x 768 resolution

MyAssistant Server Installation

- 4 GB of available memory
- 10 GB of available disk space
- Video card capable of 1024 x 768 resolution

## Supported Software

Sage 300 CRE MyAssistant 22.1 must be installed on a computer running one of the following operating systems:

- Windows Server 2016
- Windows Server 2019
- Windows 10
- Windows 11

The MyAssistant server software must be installed on a Windows Server operating system.

MyAssistant must be installed on a computer with Sage 300 Construction and Real Estate (server or workstation) installed.

MyAssistant version 22.1 is compatible with Sage 300 Construction and Real Estate v20.1 through v22. Please note, accessing MyAssistant functionality from within the Sage Desktop may only be available with certain versions of Sage 300 Construction and Real Estate.

MyAssistant must be installed on a computer with a constant connection to the Internet with access to the MyAssistant Activation server.

MyAssistant is compatible with Microsoft SQL Server Express, Standard and Enterprise editions; version 2017 or later.

The MyAssistant server installation provides the option to install MS SQL Server 2019 Express. Prior to installing SQL Server 2019, confirm that it's is compatible with any installed version.

MyAssistant is compatible with Terminal and Citrix servers when user registry settings are retained between sessions.

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

Sage 300 CRE Security must be enabled to send reports listed on a Sage Reports menu.

## Email Server Compatibility

MyAssistant is compatible with most SMTP-compatible email servers. MyAssistant has been tested with Microsoft Exchange, Office 365, and Gmail.

## Chapter 1 – Installing MyAssistant Server

Perform the following to install the MyAssistant Server software:

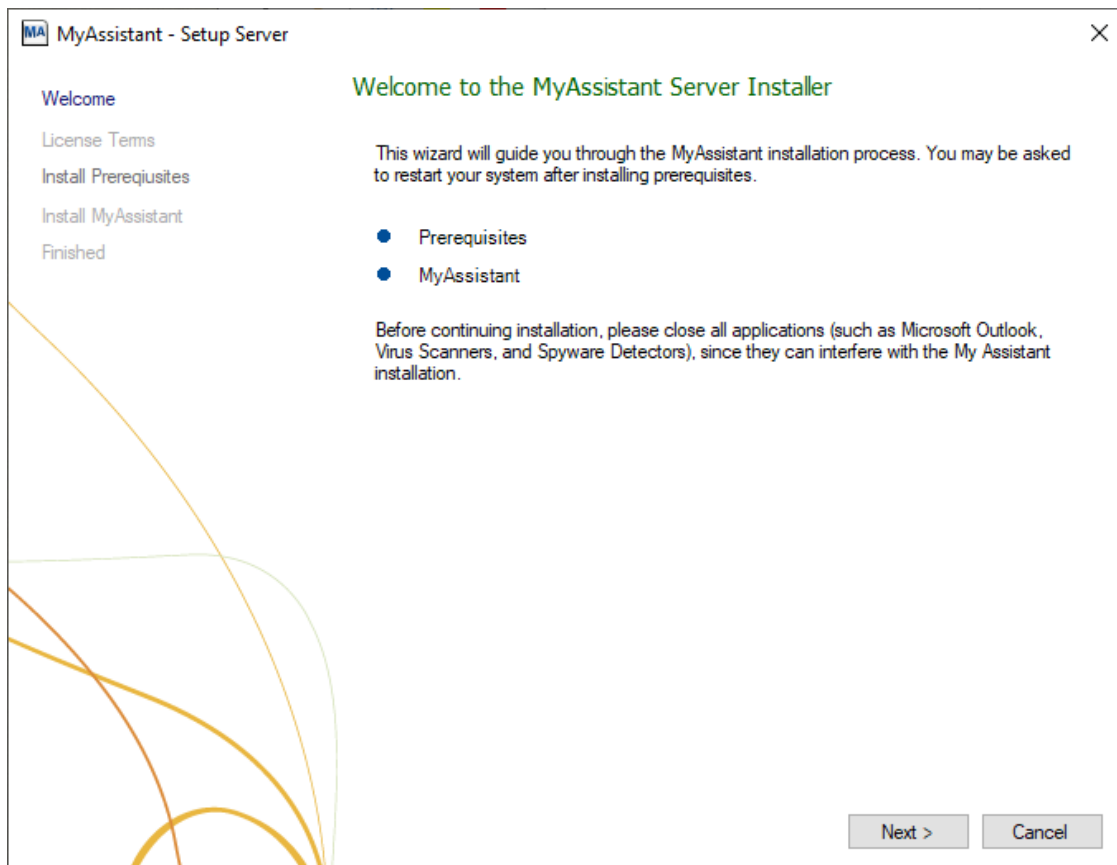
1. Log on to the server as a Windows user with Administrator-level permissions.
2. Navigate to the downloaded MyAssistant Installation files
3. Unzip the files and place them in a shared location
4. Open the unzipped folder & double-click **autorun.hta** to open the MyAssistant Installation Hub:



Click [**Install Server**].

## Step 1 – MyAssistant Server Installation

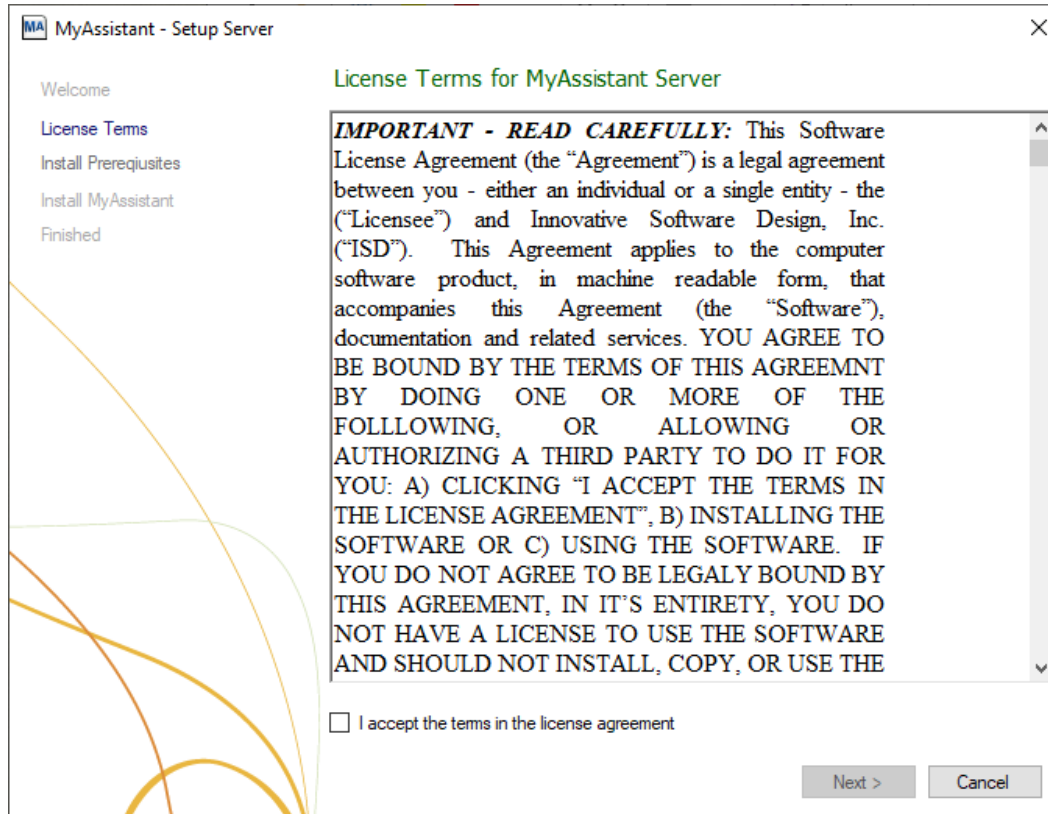
This window opens after selecting [**Install Server**]:



Click [**Next**] to continue.

## Step 2 – MyAssistant License Agreement

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

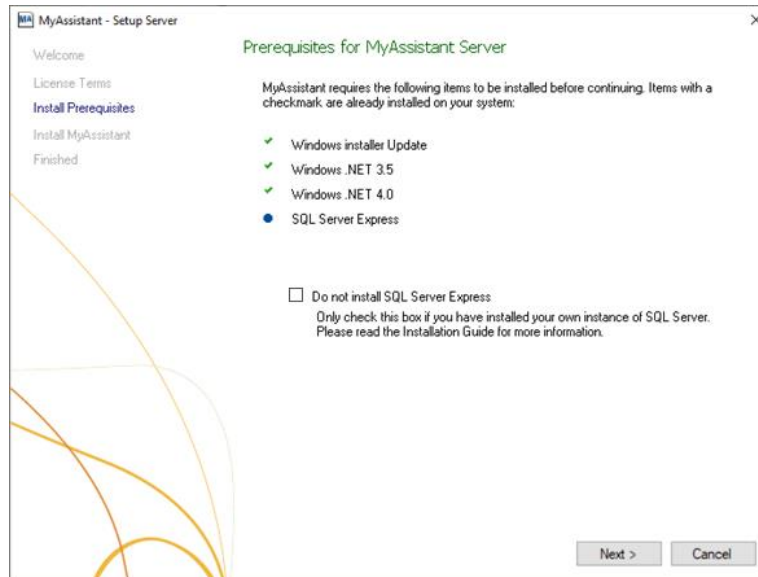


If you agree to the terms of the License Agreement, check the **I accept the terms in the license agreement** checkbox and click **[Next]** to continue.

### Step 3 – Prerequisites for MyAssistant Server

This window displays any prerequisite software MyAssistant needs to be installed – if there are none, this step will be skipped.

The most common software needing to be installed is Microsoft SQL Server. MS SQL Server 2019 Express will be installed as part of the MyAssistant install. Before installing, confirm it's compatible with any previously installed versions of MS SQL Server on the same machine.



Click **[Next]** to install the necessary prerequisite software.

**NOTE:** The SQL Server install can take up to 20 minutes. Please be patient, and do *not* cancel the SQL install.

MyAssistant also works with a full version of MS SQL Server (e.g. Standard Edition). MyAssistant requires the following settings when using a full version of SQL Server:

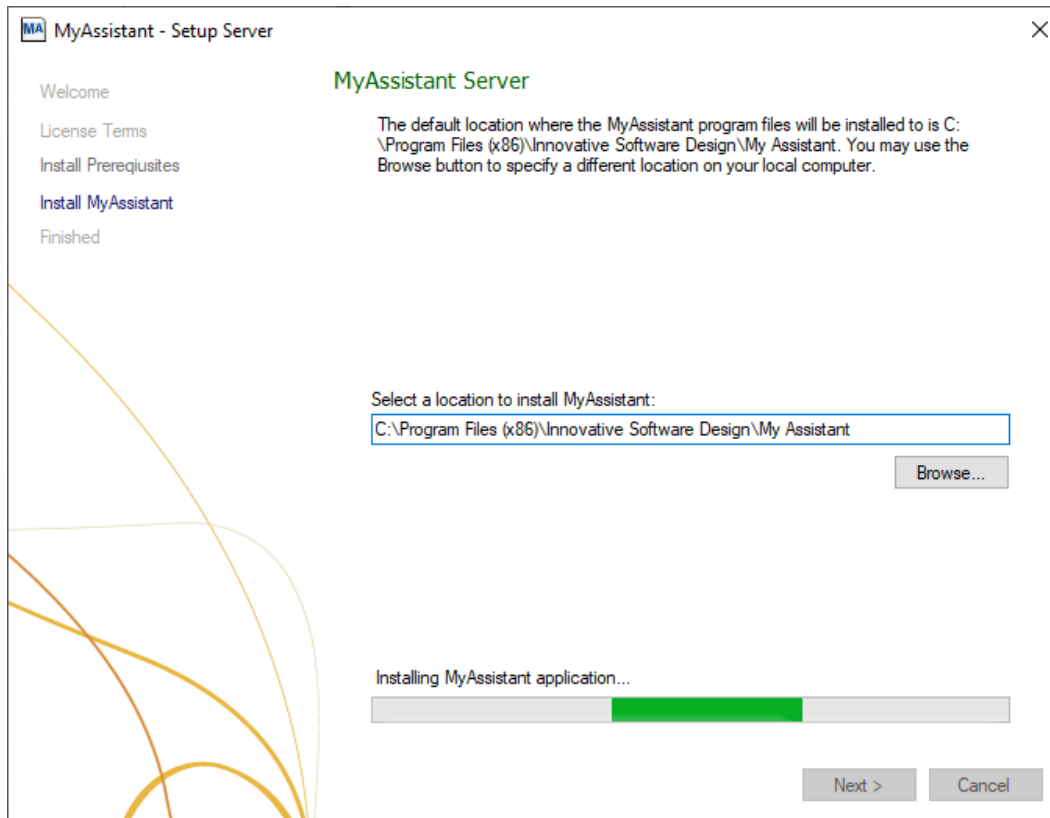
- Mixed Mode Authentication
- TCP/IP protocol enables
- A set static port with no dynamic port used
- A SQL Server username and password\*

\* If using the SQL instance installed by MyAssistant, a user name and password will automatically be created. Changing or creating a new SQL user name or password means you take full responsibility for the installation, setup, and maintenance of the SQL Server instance used with MyAssistant.

Given Microsoft SQL Server Express' system resource requirements, installing more than two SQL Server Express instances on the same machine will likely result in performance issues. To prevent this, you can install the MyAssistant Server software on another server that meets all hardware and software requirements.

## Step 4 – MyAssistant Software

This step specifies where to install MyAssistant's Program Files .



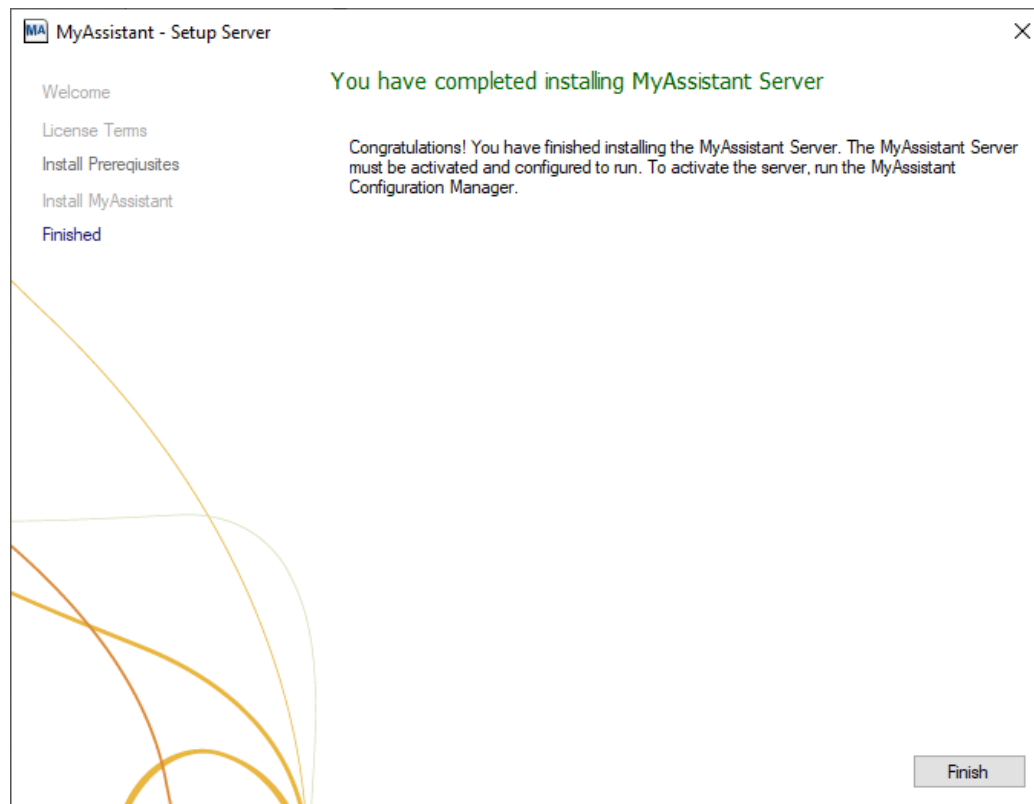
Accept the default location or click **[Browse]** to specify a different one.

Click **[Next]** to install the MyAssistant Server software.



## Step 5 – You Have Completed Installing the MyAssistant Server

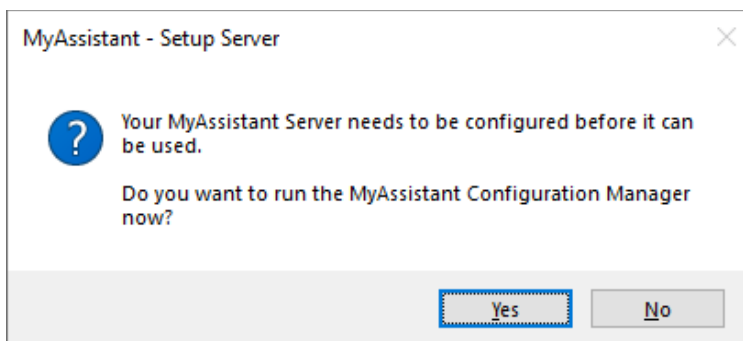
Congratulations, the MyAssistant Server install is complete.



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

## Start the MyAssistant Configuration Manager

After clicking Finish, you will be prompted to configure the MyAssistant Server software:



Click [**Yes**]. Continue to Chapter 2 to step through the MyAssistant Server Configuration Wizard.

**NOTE:** You must configure the MyAssistant Server before installing MyAssistant on any Workstations. If you do not configure your MyAssistant Server immediately after installing, log on to the server and perform the following when ready:

- Double-click the “MyAssistant Configuration Manager” icon on the desktop  
– or –
- Click Start > All Programs > MyAssistant > **MyAssistant Configuration Manager**

## Chapter 2 – MyAssistant Server Configuration

This chapter walks through the MyAssistant Server Configuration Wizard, where you will complete the following:

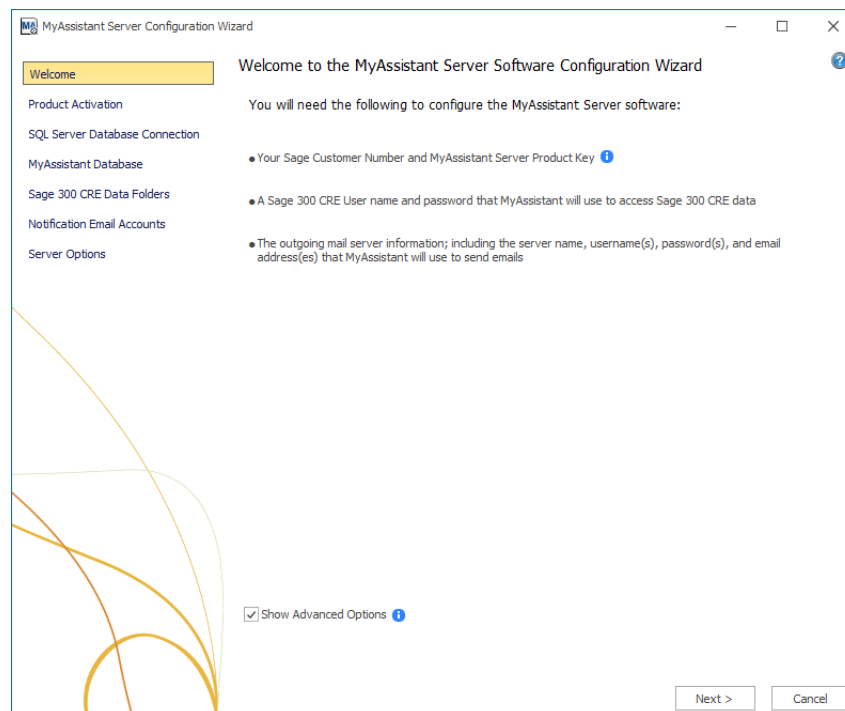
1. Activate the software
2. Select which prebuilt “Tasks” (Construction or Real Estate) to use in MyAssistant
3. Enter the Sage user name and password MyAssistant will use to access Sage 300 CRE data
4. Specify the Sage 300 CRE data folders MyAssistant will monitor
5. Specify the email address(es) MyAssistant will use to send emails
6. Specify MyAssistant Server settings

Completing the MyAssistant Server Configuration Wizard will take approximately 10 minutes.

NOTE: All configuration settings can be updated after initially completing the Configuration Wizard, except which prebuilt Tasks are set up.

### Step 1 – Welcome

If the MyAssistant Server Configuration Wizard doesn’t open after completing the MyAssistant software installation, double-click the “MyAssistant Configuration Manager” icon on the desktop or navigate to Windows Start > All Programs > MyAssistant > **MyAssistant Configuration Manager**.



Check the box next to **Show Advanced Options** if you are using a Web Proxy Server, or if you’re using a pre-existing instance of Microsoft SQL Server and need to specify the SQL connection information.

## Step 2 – Product Activation

In this step you will activate the MyAssistant Server and enter any Web Proxy Settings:

MyAssistant product keys are available in the Sage Customer Portal where you get your Sage product keys.

Enter the following information in their respective fields:

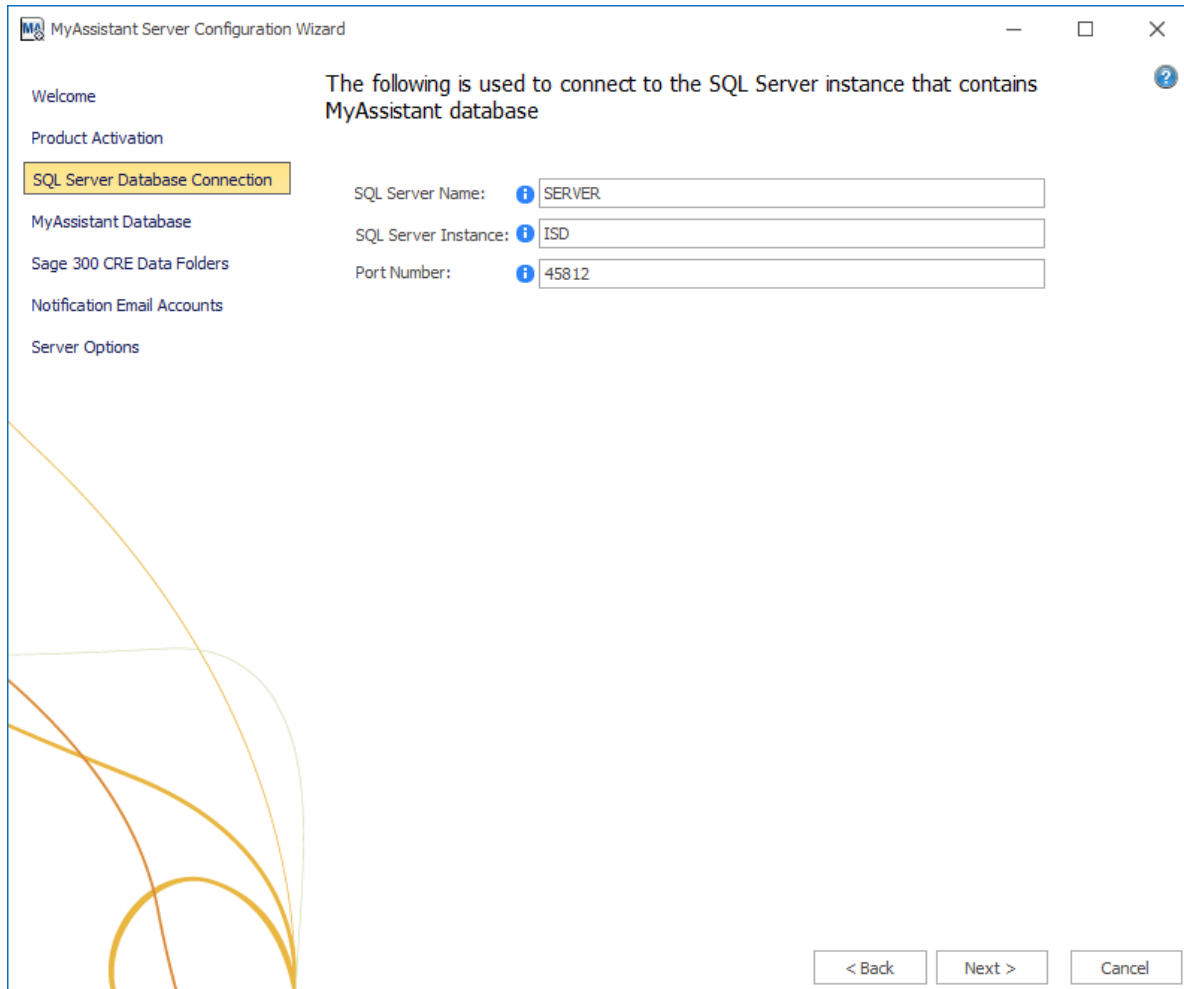
- **Customer Number:** Sage customer number.
- **Product Key:** MyAssistant Server product key.

Click [**Activate**], then [**Next**] to continue.

**NOTE:** The **Web Proxy Server** checkbox will only appear if you selected Show Advanced Options in the Welcome step. If you use a Web Proxy Server, check the box displayed under the Server Product Key field and provide the requested information.

## Step 3 – Database Connection

This step will only be available if you checked the **Show Advanced Options** checkbox in the Welcome step, or if you are using a version of Microsoft SQL Server other than the instance installed by MyAssistant.



The screenshot shows the 'MyAssistant Server Configuration Wizard' window. The 'SQL Server Database Connection' step is selected and highlighted in the left-hand navigation pane. The main area displays the following text: 'The following is used to connect to the SQL Server instance that contains MyAssistant database'. Below this text are three input fields: 'SQL Server Name:' with the value 'SERVER', 'SQL Server Instance:' with the value 'ISD', and 'Port Number:' with the value '45812'. Each field has an information icon (i) to its left. At the bottom right of the window, there are three buttons: '< Back', 'Next >', and 'Cancel'. The window title bar includes standard minimize, maximize, and close buttons, and a help icon (?) in the top right corner.

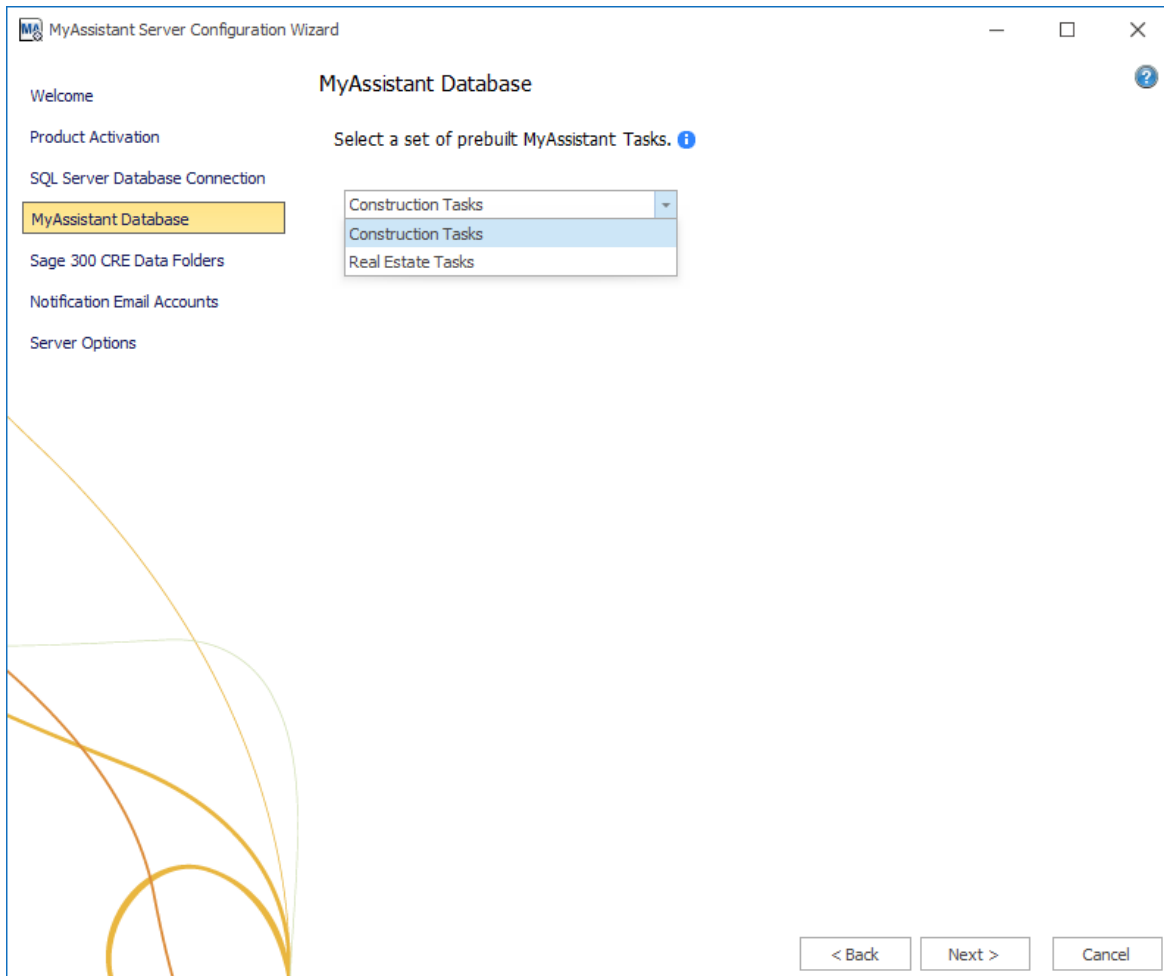
Enter the SQL server name, SQL Instance name and Port Number MyAssistant will use to connect to the database.

Click [**Next**] to continue.

## Step 4 – Create the MyAssistant Database

Select which prebuilt MyAssistant Tasks to install based on your business. This selection is permanent and cannot be changed.

Check the Documents folder in the MyAssistant install files to see what Tasks are set up with each selection.



Click **[Next]** to create the MyAssistant database.

## Step 5 – Sage 300 CRE Data Folders

Specify the Sage user MyAssistant will use to access data and the data folder(s) MyAssistant will monitor:

Welcome

Product Activation

SQL Server Database Connection

MyAssistant Database

**Sage 300 CRE Data Folders**

Notification Email Accounts

Server Options

### Define Sage 300 CRE Data Folders

Enter a Sage 300 CRE operator and password that MyAssistant will use to access Sage 300 CRE data.

Sage 300 CRE User: SageUser

Sage 300 CRE password: \*\*\*\*\*

Show characters

+ Add Folder    SQL Reports

	Sage 300 CRE Folder Location	Name
▶	C:\ProgramData\Sage\TIMBERLINE OFFICE\Data\C...	Timberline Construction
*		

Importing custom fields: 28% completed...

< Back    Next >    Cancel

**Sage 300 CRE User** – Enter the Sage 300 CRE user name MyAssistant will use to access the Sage 300 CRE database when Tasks are run.

**Sage 300 CRE password** – Enter the password associated with the Sage user entered.

**IMPORTANT:** Best practices are to use a Sage 300 CRE user with a password that does not expire. Also, using an Application Administrator-level Sage user ensures MyAssistant has sufficient access to Sage data.

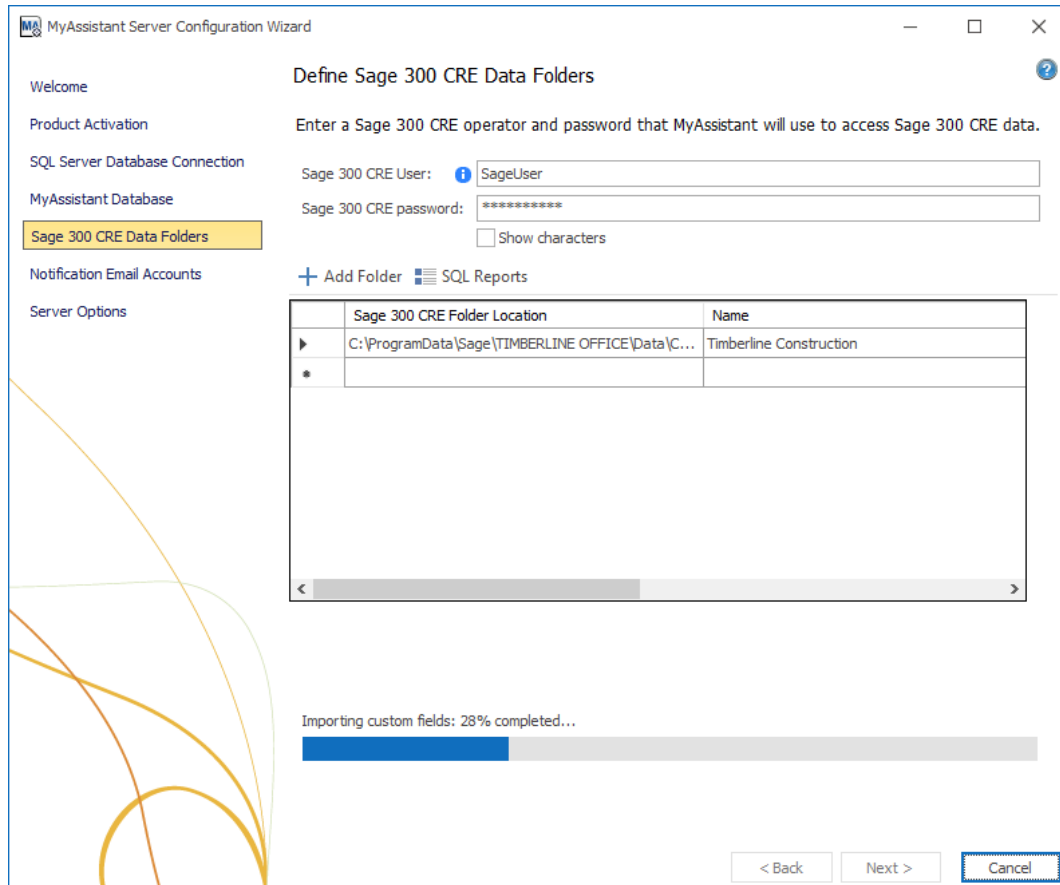
Click **[Add Folder]** and select the first Sage Data folder you want to monitor. Repeat as desired until all Sage data folders are added. If the MyAssistant Server is not on the same computer as the Sage 300 CRE Server, make sure the data folders paths are UNC paths and do not use mapped drives.

Click **[Next]** to continue.

## Import Sage Database Customizations

MyAssistant automatically imports custom fields and descriptions when monitoring one Sage data folder. If MyAssistant is monitoring multiple folders, you will be prompted to select which folder's customizations to import.

**NOTE:** Only one Sage folder's custom fields & descriptions can be in MyAssistant at a time. Importing another Sage data folder's customizations will overwrite previous Sage customizations in MyAssistant.



When you create a new custom field or change a field's description in Sage 300 CRE, you must re-run the import for MyAssistant to recognize the change. This can be done from inside the MyAssistant Designer.



## Step 6 – Notification Email Accounts

Specify the information MyAssistant needs to send information & reports via email:

**Outgoing Email Server** – Confirm your outgoing server name with your IT/mail server administrator. All email addresses entered in this step must use the same outgoing mail server.

**Outgoing Email Server Port** – Enter the port to use if the outgoing email server requires a port other than 25.

Check the box for **Use an SSL/TLS connection** if your email server requires a secure connection.

### From Email Account(s):

MyAssistant can send emails from multiple different email addresses. Enter the following information for each Email Address:

- **Default Checkbox** – MyAssistant sends emails from this account when another isn't specified on a Task.
- **From Name** – This name is displayed in the recipient's inbox
- **Email Address**
- **User Name** – In most cases the user name is the email address. Confirm with your email server administrator
- **Password**

**IMPORTANT:** You may need to configure SMTP relays to allow the MyAssistant Server to send email messages. Consult your mail server administrator to confirm your settings and/or configure your relays.

### Determining Mail Settings in Outlook for Microsoft Office 365 and Outlook 2016

Perform the following to find the outgoing mail server and user name for a specific email address when using Outlook for Microsoft Office 365.

1. Log onto the machine as the Windows user that can send an email from the account/address MyAssistant will use to send emails.
2. Start Microsoft Outlook.
3. Click on the **File** tab and select **Account Settings**.
4. In the dropdown menu that appears, click [**Account Settings**].
5. Select the email account that will be used in the Account List, then click [**Change**].
6. Enter the name displayed in the Mail Server field as your Outgoing Mail Server in MyAssistant.
7. Enter the user name displayed in the User Name field as your user name in MyAssistant.

Change Account

**Server Settings**  
Enter the information that is required to connect to an Exchange ActiveSync service.

**User Information**  
Your Name: John Doe  
E-mail Address: John.Doe@company.com

**Server Information**  
Mail server: blu403-m.company.com

**Logon Information**  
User Name: John.Doe@company.com  
Password: \*\*\*\*\*  
 Remember password

**Offline Settings**  
Mail to keep offline: [Slider] All

< Back   Next >   Cancel

## Step 7 – Server Options

Determine several MyAssistant Server settings:

**Daily Summaries Time:** Daily Summaries send each recipient their information across several Tasks in one email. See the MyAssistant User Guide for more information. The time entered should be after all of your Tasks have finished running.

**Send Errors To:** Specify who to notify if MyAssistant encounters an error. Best practice is to send error messages to whoever has the MyAssistant Designer.

### Running Tasks and Sending Service Settings:

MyAssistant runs Tasks, sends emails and updates Sage data with MyCommunicator via background processes (i.e. Windows Services) on the server. These processes are scalable to increase performance, and can auto-correct if they stop working.

MyAssistant's Windows Services (named "ISDAdminTaskService" and "ISDAdminSenderService") start other processes named "TaskRunner\*32". Each process uses **30-50Mb** of memory when idle. Many variables affect system resources when Tasks run and emails are sent, including:

- The available server memory
- Disk drive performance
- Other server demands at the time the MyAssistant Tasks are run or emails are being generated. For example, running Tasks at night may allow MyAssistant to use additional server resources.

Perform the following to determine the optimal number of processes:

- Complete the MyAssistant Server Configuration Wizard with the default settings and the MyAssistant Workstation installation.
- Activate two MyAssistant Tasks you will regularly use.
- Monitor the server memory usage and disk queue lengths when the Tasks are run concurrently.
- Open the MyAssistant Configuration Manager and increase or decrease the number of processes based on the results of this test and available server resources.

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

Once the Configuration Wizard has closed, the Server portion of the MyAssistant installation is complete. Continue to Chapter 3 to install the MyAssistant Workstation.

## Chapter 3 – Installing MyAssistant Workstation

**NOTE:** If you are installing MyAssistant workstations on a Terminal or Citrix Server, go to Chapter 6. If you are using the MyAssistant workstation on the same machine as the MyAssistant Server software, go to chapter 5.

Before installing MyAssistant on your workstation, confirm you can open Sage 300 CRE and run reports (including Service Management, if used).

Perform the following to install MyAssistant:

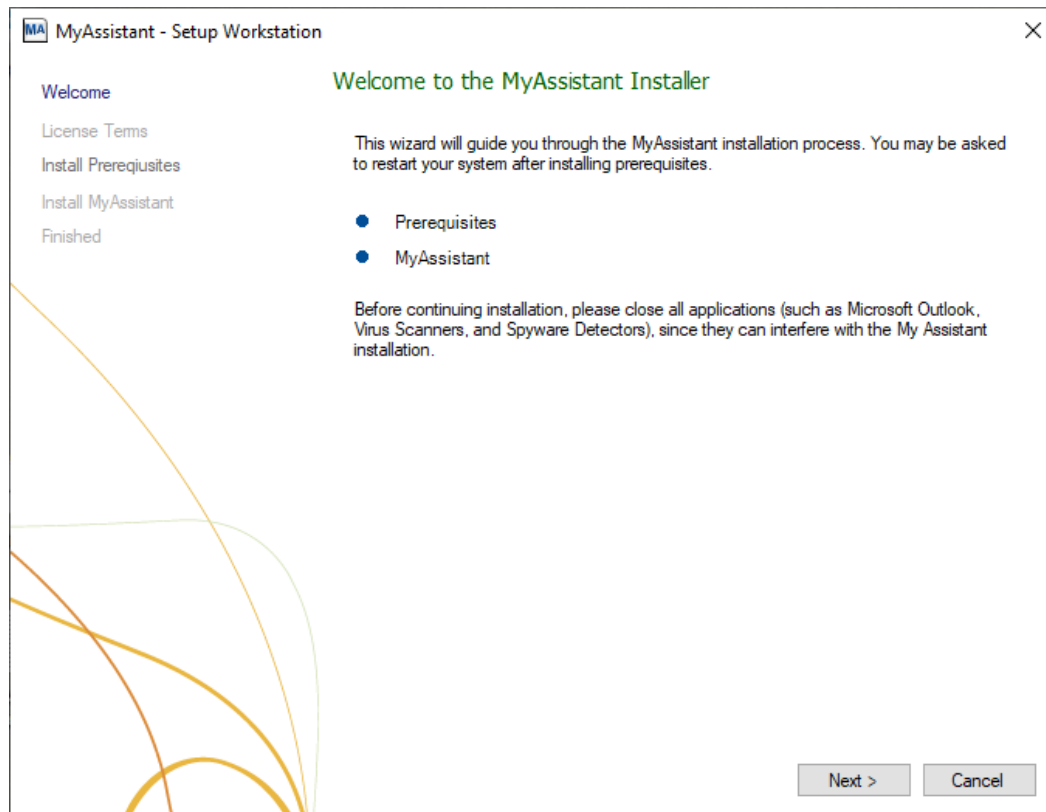
1. Log on to the machine that will be the Sage 300 MyAssistant Workstation as a Windows user that has Administrator or unlimited permissions.
2. Confirm that you have closed all applications and disabled any anti-virus or Firewall software that may be running.
3. Confirm that all system software updates/installations have been completed by restarting the machine prior to installing MyAssistant.
4. 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 install on the MyAssistant Server. Perform the following:
  - a) Open the location of the downloaded MyAssistant Installation files.
  - b) Unzip the files to a folder on the local drive on the machine.
  - c) Open the location of the unzipped MyAssistant installation files and double click **autorun.hta**
5. The Sage 300 CRE MyAssistant Installation hub will open:



Click **[Install Workstation]** to begin.

## Step 1 – Welcome

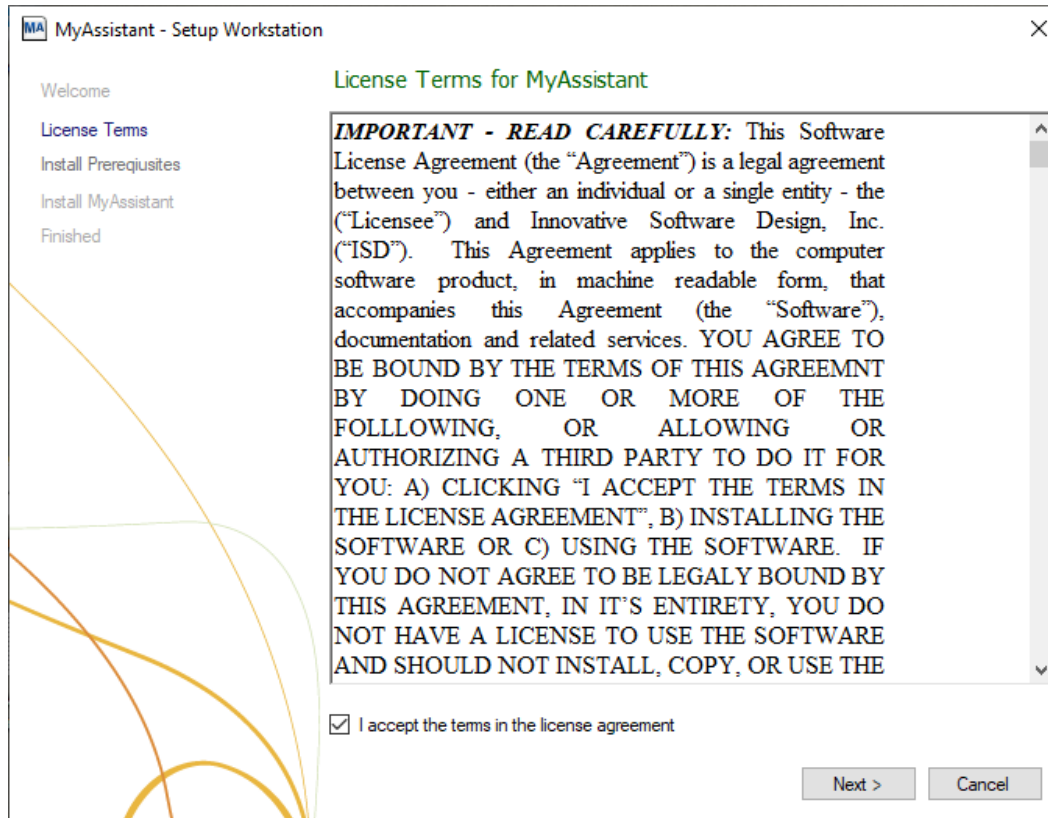
When you select **Workstation Install** in the MyAssistant splash screen, the Setup Workstation wizard will appear.



Click **[Next]** to continue.

## Step 2 – MyAssistant 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

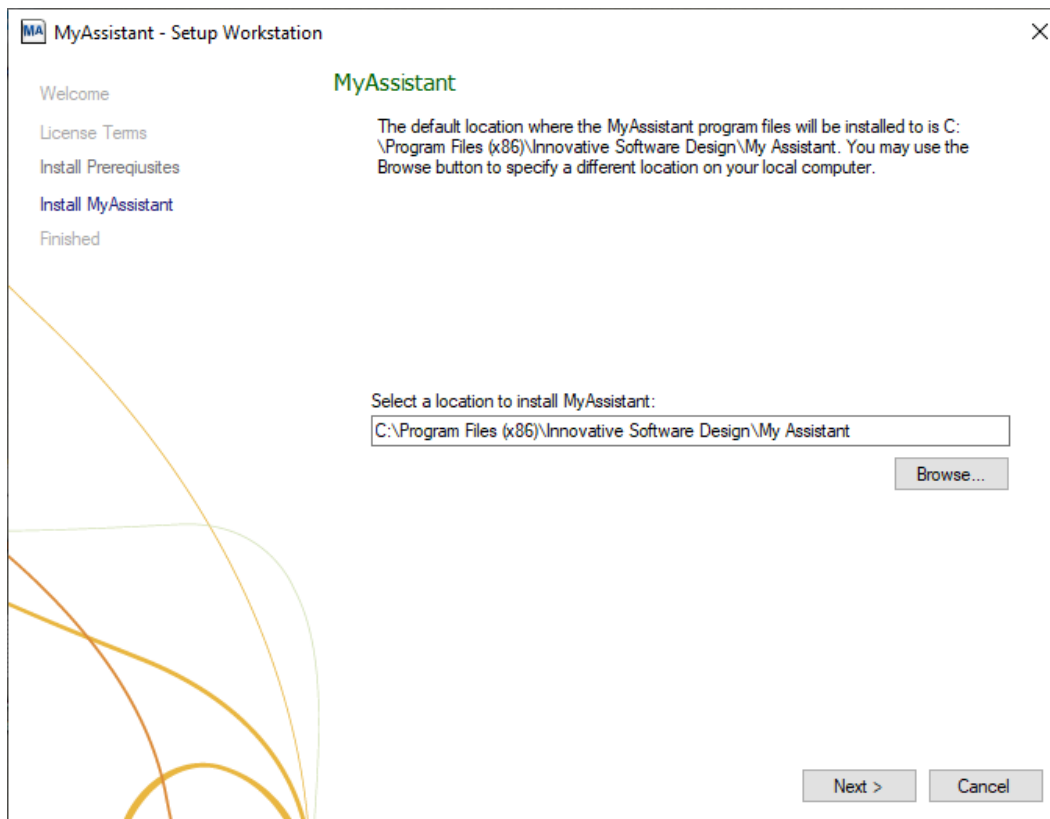
This window displays any prerequisite software MyAssistant needs installed – if there are none, this step will be skipped.

Click [**Next**] to install any prerequisite software.



## Step 4 – Install the Software

Determine where the MyAssistant program files will be installed:

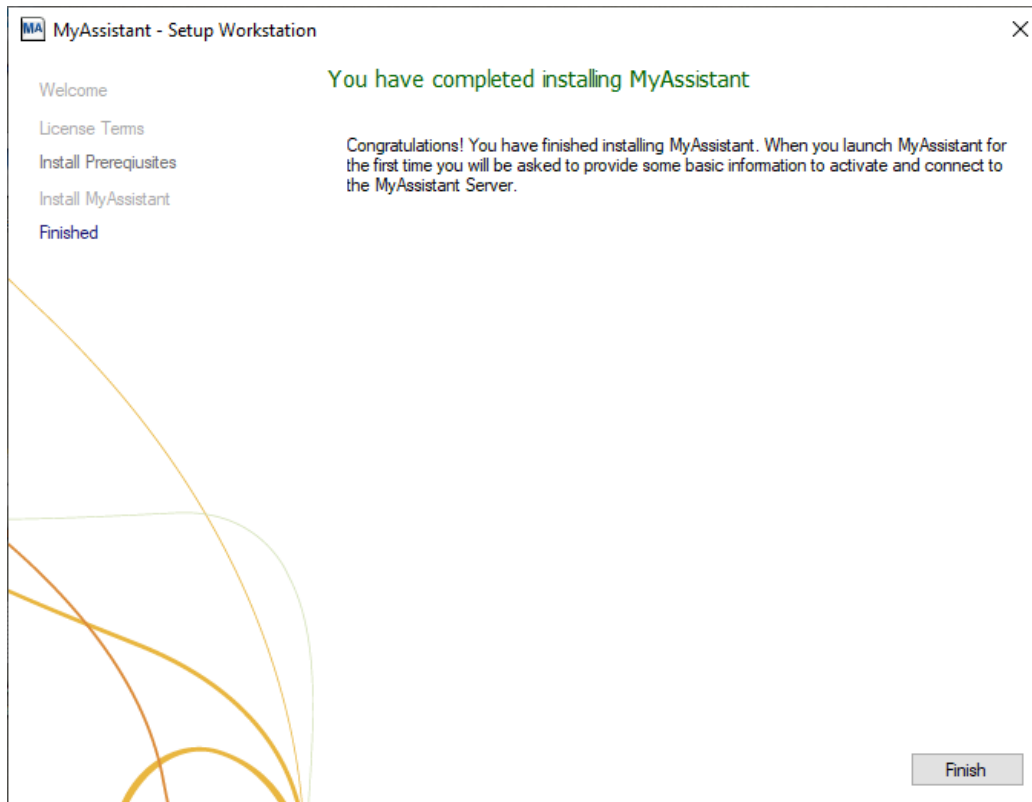


Accept the default location or use the **[Browse]** button to specify a different one.

Click **[Next]** to install the MyAssistant software.

## Step 5 – You Have Completed Installing MyAssistant

Congratulations, MyAssistant has successfully been installed.



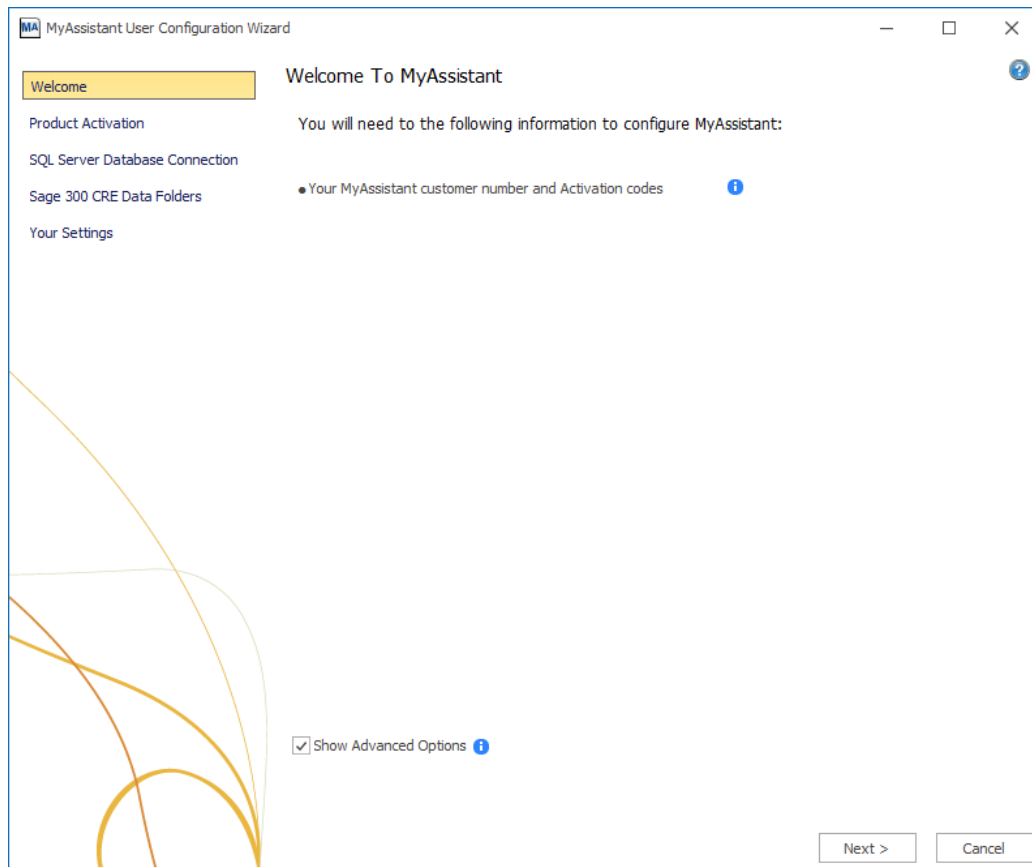
Click **[Finish]** to close the setup wizard.

## Chapter 4 – MyAssistant Workstation Configuration

After installing the MyAssistant Workstation, a MyAssistant shortcut is added to the desktop. The first time you double-click the shortcut the Workstation Configuration Wizard will start.

Configuring the MyAssistant Workstation will take approximately 5 minutes.

### Step 1 – Welcome Screen



If there is not a shortcut on the desktop, open MyAssistant using the following path:

Start Menu > All Programs > MyAssistant > **MyAssistant**

## Step 2 – Product Activation

MyAssistant must be activated to use it. A working internet connection is required to complete this step.

Each MyAssistant workstation is tied to a Windows user on a computer. Make sure that you are logged in as the Windows User who will use MyAssistant prior to activation. This may not be the same as the Windows account used to install the MyAssistant Workstation.

**NOTE:** The Web Proxy Settings will only be visible if you clicked [**Show Advanced Options**] in the Welcome step and if you check **Use Web Proxy Server**. If you don't know if you're using a Web Proxy Server, it is recommended that you leave the box unchecked.

MyAssistant product keys are available in the Sage Customer Portal where you get your Sage product keys.

Enter the following information in their respective fields:

- **Customer Number:** Sage customer number.
- **Product Key:** MyAssistant Workstation product key. This will be one of two licenses:

**MyAssistant Designer** – The full version of MyAssistant. The MyAssistant Designer provides the ability to create, activate and change Tasks; as well as run Tasks and view what was found.

**MyAssistant** – MyAssistant has the ability to run MyAssistant Tasks on demand and view what was found.

## Step 3 – Entering Sage 300 CRE Data Folder Information

Specify the Sage user MyAssistant will use locally and confirm the data folder(s) MyAssistant will monitor:

Ignore	Sage 300 CRE Folder Location	Name
<input type="checkbox"/>	C:\ProgramData\Sage\TIMBERLINE OFFICE\D...	Timberline Construction

**Specify Sage 300 CRE data folder locations** – The data folders specified during the MyAssistant server setup will be listed in the grid. Click in the grid to select any data folder paths that do not pre-fill.

Check the **Ignore** check box for any Sage 300 CRE data folders that should not be accessed on this workstation.

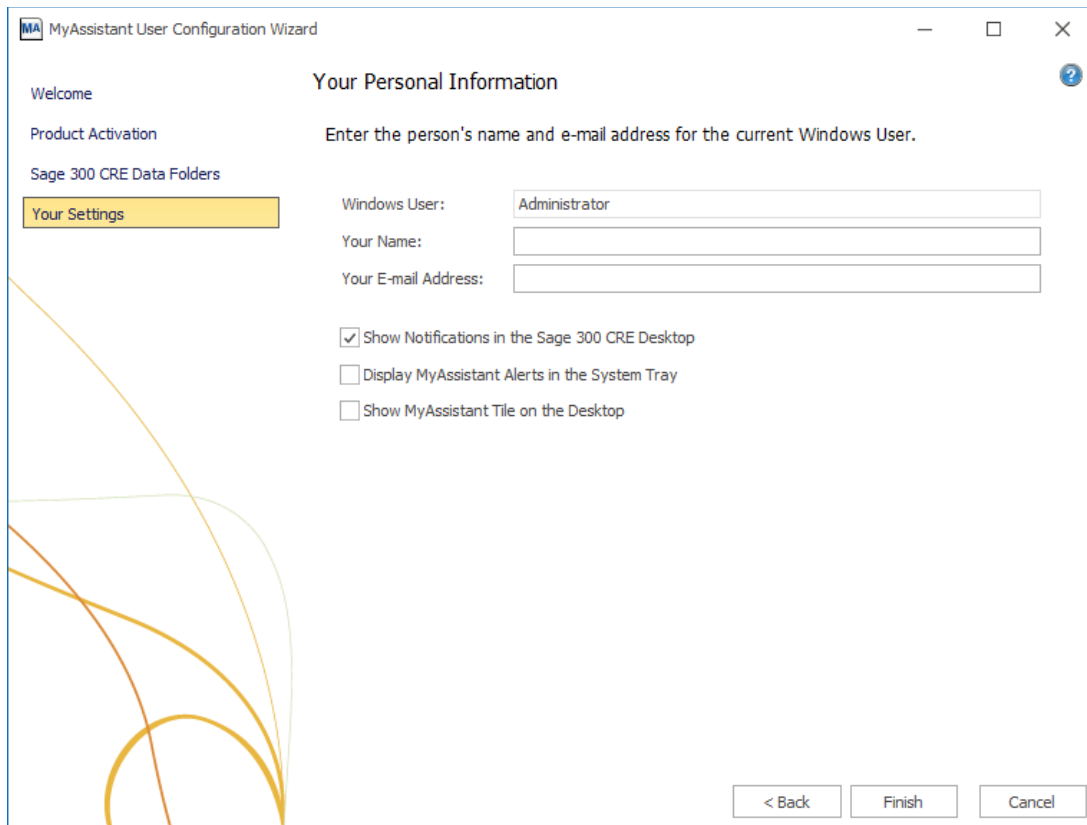
**Sage 300 CRE User and Password** – Enter the Sage User & password for the person using MyAssistant. This will be used to:

- Access Sage 300 CRE reports that can be attached to Tasks
- Test MyAssistant Task Conditions
- Test MyAssistant Formulas
- Preview MyAssistant Spreadsheet Templates.

Click [**Next**] to continue.

## Step 4 – User Profile

Enter information for the person using MyAssistant:



The screenshot shows the 'MyAssistant User Configuration Wizard' window. The title bar reads 'MyAssistant User Configuration Wizard'. On the left, a navigation pane lists steps: 'Welcome', 'Product Activation', 'Sage 300 CRE Data Folders', and 'Your Settings' (which is highlighted in yellow). The main area is titled 'Your Personal Information' and contains the instruction: 'Enter the person's name and e-mail address for the current Windows User.' Below this are three text input fields: 'Windows User:' (containing 'Administrator'), 'Your Name:', and 'Your E-mail Address:'. There are three checkboxes: 'Show Notifications in the Sage 300 CRE Desktop' (checked), 'Display MyAssistant Alerts in the System Tray' (unchecked), and 'Show MyAssistant Tile on the Desktop' (unchecked). At the bottom right, there are three buttons: '< Back', 'Finish', and 'Cancel'. The window also features a help icon (?) in the top right corner and a decorative graphic of overlapping orange and green arcs on the left side.

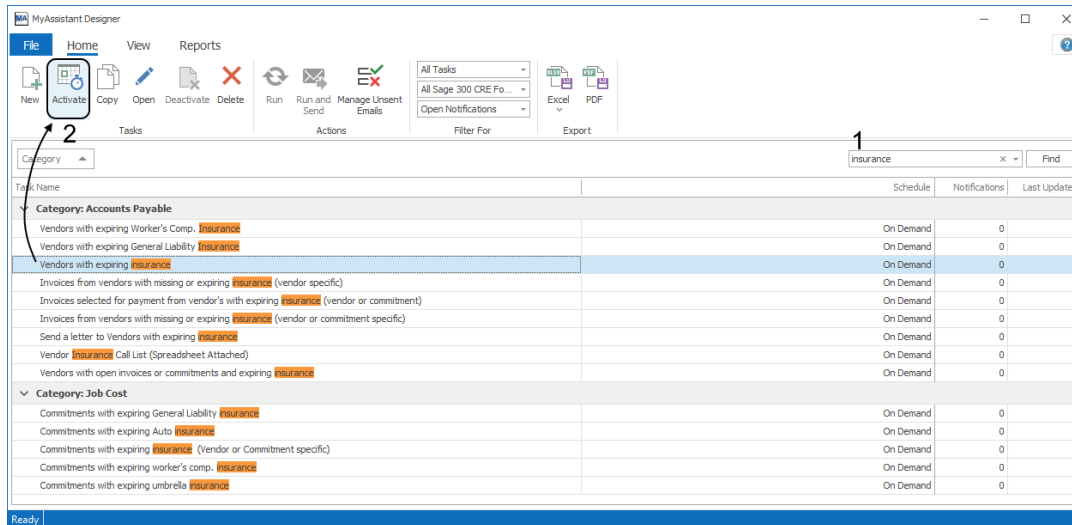
Fill out the following fields:

- **Your Name**
- **Email Address**

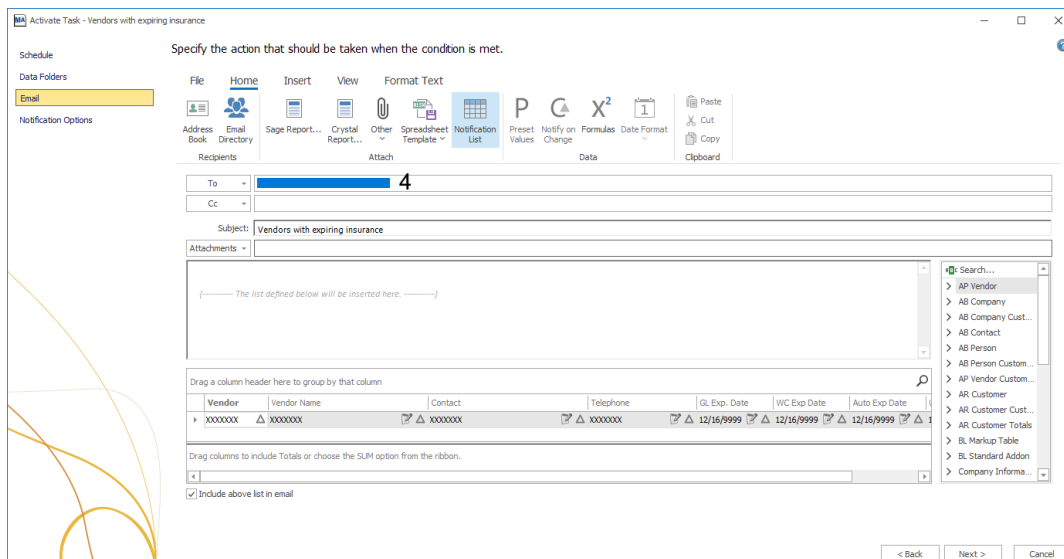
Click **[Finish]** – MyAssistant will automatically start

## Step 5 – Test MyAssistant

Perform the following to test MyAssistant's ability to run Tasks and send Emails after the MyAssistant Designer has been configured:



1. Type a keyword like “insurance”, “budget”, etc. in the search bar in the top-right of the window
2. Select a MyAssistant Task (e.g. Vendors with expiring insurance) and click **[Activate]**
3. Click **[Next]** in the bottom-right of the window that opens until you get to the “Email” step (highlighted on the left side of the window)
4. Type your email address in the “To” line, then click **[Next]**



5. Click **[Finish]**
6. When prompted to run the Task, click **[Yes]**

If MyAssistant's two Windows Services ( "ISDAdminTaskService" and "ISDAdminSenderService") have sufficient permissions on the server and the outgoing mail server settings were set up correctly, the Task will run successfully. If the Task finds any information to send, an email will be generated and sent.

NOTE: If a the MyAssistant Task runs successfully but does not find any information that meets its criteria, an email will not send. Repeat the above steps with a new Task to test sending emails.

## Chapter 5 – Additional Settings

### Antivirus Exceptions

Many common antivirus, Internet filtering or Firewall products can block or prevent MyAssistant from running Tasks and/or sending emails. If this happens, add the "Innovative Software Design" folder containing the MyAssistant program files to the exception/white lists.

If your antivirus/firewall software requires adding specific programs to exceptions/white lists select the following:

- *MyAssistant.exe*
- *ISDAdminService.exe*
- *ReportRunner.exe*
- *TaskRunner.exe*
- *MyAssistantConfigurationManager.exe*

All of the above programs can be found in the "Innovative Software Design" folder that contains the MyAssistant program files on the server.



## Chapter 6 – Installing on a Terminal Server

**NOTE:** 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. If a Terminal or Citrix Server will be used only for the MyAssistant Workstation, follow the steps in Chapters 3 and 4.

### What is Involved

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

1. Log onto the Server as a System Administrator
2. Run the MyAssistant Server Installation Wizard
3. Activate and configure the MyAssistant Server
4. Log onto the machine with the Windows credentials of the user who will run the software
5. Open the MyAssistant user Application
6. Activate and configure MyAssistant for the Windows user

### Before Installing

Before MyAssistant can be activated on any accounts other than the Administrator, permissions must be given to specific files. The default paths have been provided below, but they may vary.

- 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.

### Installing the MyAssistant Server

Return to Chapters 1 and 2 for installing and configuring 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, refer to Chapter 4 to activate the MyAssistant workstation.

## Chapter 7 – Frequently Asked Questions

### Installation

1. [What version of MyAssistant needs to be installed?](#)  
The version that matches your primary version of Sage (i.e. the numbers before the first period in the Sage version)
2. [Does the MyAssistant Server need to be installed on the Sage 300 Server?](#)  
No, the MyAssistant Server can be installed on any computer that has at least a Sage workstation installed and meets the software & hardware requirements
3. [Does Sage need to be installed prior to installing MyAssistant?](#)  
Yes at least a Sage 300 workstation install
4. [Will installing MyAssistant require a reboot?](#)  
Only if a prior software installation (e.g. a Windows Update) hasn't completed and is waiting on a restart
5. [Does everyone need to be out of Sage to install MyAssistant?](#)  
No, everyone can continue to work in Sage while MyAssistant is installed
6. [Does Windows UAC need to be turned off on the MyAssistant server?](#)  
Yes
7. [How do you turn off Windows User Account Control \(UAC\) in the registry?](#)  
Click the Windows Start button, type "regedit" in the search bar and select it from the list. Navigate to *HKEY\_LOCAL\_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\System*. Double-click on "EnableLUA" and change the value from 1 to 0.
8. [Do I need to let MyAssistant install an instance of MS SQL Server Express?](#)  
Yes, unless a full version of SQL Server has been purchased and will be used.
9. [How do I know if the SQL Server installed on server is the Full or Express Edition?](#)  
You cannot determine the SQL Server Edition (Full or Express) from the software listed the Programs and Features window.

Check to see if SQL Server Management Studio is installed. If it isn't, it is HIGHLY unlikely that a full version of SQL is installed given that SQL Server Management Studio is installed with full SQL.

Perform the following if SQL Server Management Studio is installed:

- Start SQL Server Management Studio
  - Connect to the SQL Instance that you think is the full version
  - Click the New Query button
  - Type *Select @@version* and click **[Execute]**
  - Expand the column width in the query results and look for the word "Express"
10. [Where do I look for more information if something goes wrong when installing MyAssistant?](#)  
Click the Windows Start button, type "Event Viewer" in the search bar and select the program from the list. Expand "Windows Logs" and select Application. Look for any entries with "MyAssistant" under the Source column.

11. [What are common causes of the 1603 install error?](#)
  - a. The folder that you are trying to install is encrypted.
  - b. The drive that contains the folder that you are trying to install the Windows Installer package to is accessed as a substitute drive.
  - c. The SYSTEM account does not have Full Control permissions on the folder that you are trying to install the Windows Installer package to. The Windows Installer service uses the SYSTEM account to install software

## Configuration

1. [What are common reasons MyAssistant fails to activate?](#)
  - Incorrect Customer number or Product Key
  - Firewall (software or hardware)
    - Add the “Innovative Software Design” folder and all its subfolders in Program Files (x86) to the Firewall Exceptions / White list
  - Antivirus software
    - Add the “Innovative Software Design” folder and all its subfolders in Program Files (x86) to the Anti-virus Exceptions or White list
    - If individual files must be selected:
      - MyAssistant.exe, MyAssistantConfigurationManger.exe, TaskRunner.exe and ReportRunner.exe at C:\Program Files (x86)\Innovative Software Design\My Assistant
      - ISDAdminService.exe at C:\Program Files (x86)\Innovative Software Design\My Assistant\SenderService
      - ISDAdminService.exe and TaskRunner.exe at C:\Program Files (x86)\Innovative Software Design\My Assistant\TaskService
  - Windows UAC is enabled
  - Server has been activated with another Windows user account
2. [What are some of the reasons that I'm unable to logon to SQL server the first time through the MA Server Configuration?](#)
  - MyAssistant is unable to create a SQL Server user because doesn't recognize the logged on user as having administrative privileges
  - Incorrect TCP port or a dynamic port is specified in the
3. [Why am I receiving an "...unable to write to database..." error?](#)  
See reasons for not being able to log onto the SQL Server database.
4. [Which Sage User should be used in the Server configuration?](#)  
One with Application-level privileges to the data you want to access with MyAssistant and a password set to never expire.
5. [Does MyAssistant use a Sage license?](#)  
No
6. [What are the names of the MyAssistant Windows Services?](#)  
MyAssistant uses two Windows Services to run Task, generate reports that are attached to email messages and send email messages. The MyAssistant services are:
  - ISDAdminTaskService
  - ISDAdminSenderService

## 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](http://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 Learning**] and review the available options in each

How to access Complimentary MyAssistant Training in Sage University:

1. Enter [www.SageU.com](http://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](http://www.YouTube.com/MyAssistantTraining) into a web browser
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.

## Conclusion

This completes the initial setup of the Sage 300 CRE MyAssistant software. The next step is to activate or create MyAssistant Tasks to begin monitoring your business. Please refer to the User Guide for information on using MyAssistant.