Sage MyAssistant Version 23.1

Upgrade Guide

Sage

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MyAssistant Upgrade Guide

This document steps through upgrading and configuring Sage 300 CRE MyAssistant 22.1. 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. Running the MyAssistant Server Configuration Wizard to upgrade the MyAssistant database and confirm previous settings are correct.
3. Upgrade MyAssistant on the desktop computers or Terminal/Citrix Servers where MyAssistant is used.

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

Please see page 30 in this document for a list of support and training resources.

Before You Begin

- Check the "Log On As" column for the Windows Services "ISDAdminSenderService" and "ISDAdminTaskService" on the MyAssistant Server computer. Log on to the server, right-click the Windows Start button, select Computer Management, expand "Services and Applications", then click on "Services". If these services are "logging on as" a Windows user other than "Local System", you will need to update them to run as that user again after upgrading the software.
- Confirm that you are upgrading from MyAssistant version 4.2 or later. The version can be found by starting MyAssistant and clicking File > Help > About
- Determine the computer where the MyAssistant server software is currently installed. It is most likely on your Sage 300 CRE server.
- Identify the Windows User that will be used to upgrade the software. This account will need Administrator-level permissions.
- Ensure the latest Microsoft Windows updates have been installed.
- Confirm all machines where MyAssistant will be installed are running the same version of Sage 300 CRE (which can be any version from 20.1 through version 22), including the MyAssistant Server.

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

Chapter 1 – Back Up the MyAssistant Database

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

1. Log on as an Administrator to the computer where the MyAssistant Server software installed
2. Click the Windows Start button
3. Type "SQL Server Management" -- you're looking for a program called "SQL Server Management Studio"

If SQL Server Management Studio is installed:

1. Right-click on "SQL Server Management Studio" in the search results and select "Run as administrator"
2. In the first SQL Server window, make sure the server name is set to "[ServerName]\ISD" and the Authentication is set to "Windows Authentication"
3. Click "Connect"
4. Click the "+" next to the "Databases" folder on the left side of the window
5. Right-click on the database "Notification", then select "Tasks" > "Back Up..."
6. Make sure the "Back up to" in the Destination section is set to "Disk"
7. Click "Remove" to to clear the pre-added backup location
8. Click "Add"
9. Click the "..." button in the window that opens
10. Pick where you save the backup by accepting the default "Selected path" or picking a new one
11. In the "File name" field, type something like "MyAssistant Backup DB - [CompanyName] [Today's date with dashes].bak"
12. Click OK to confirm the backup name and location
13. Click OK to close the "Select Backup Destination" window
14. Click OK to back up the database
15. When the backup finishes, click OK on the message that appears
16. Exit SQL Server Management Studio

If SQL Server Management Studio is NOT installed:

1. Open Windows File Explorer
2. Create a folder on the C: Drive
3. Click the Windows Start button
4. Type "CMD"
5. Right-click on "Command Prompt" in the search results and select "Run as administrator"
6. Type "sqlcmd -E -S .\ISD" and press "Enter" on your keyboard
7. Type "Use Notification" and press "Enter"
8. Type "go" and press "Enter" -- you should see a message that reads "Changed database context to 'Notification'."
9. Type "Backup database Notification to disk = '[Folder you created]\MyAssistant DB Backup [Company Name] [Today's date with dashes].bak' " and press “Enter”
10. Type "go" and press the "Enter" key on your keyboard
11. When the backup finishes, close the window

After backing up the MyAssistant database, you are ready to upgrade the software.

Chapter 2 – Upgrading the MyAssistant Server Software

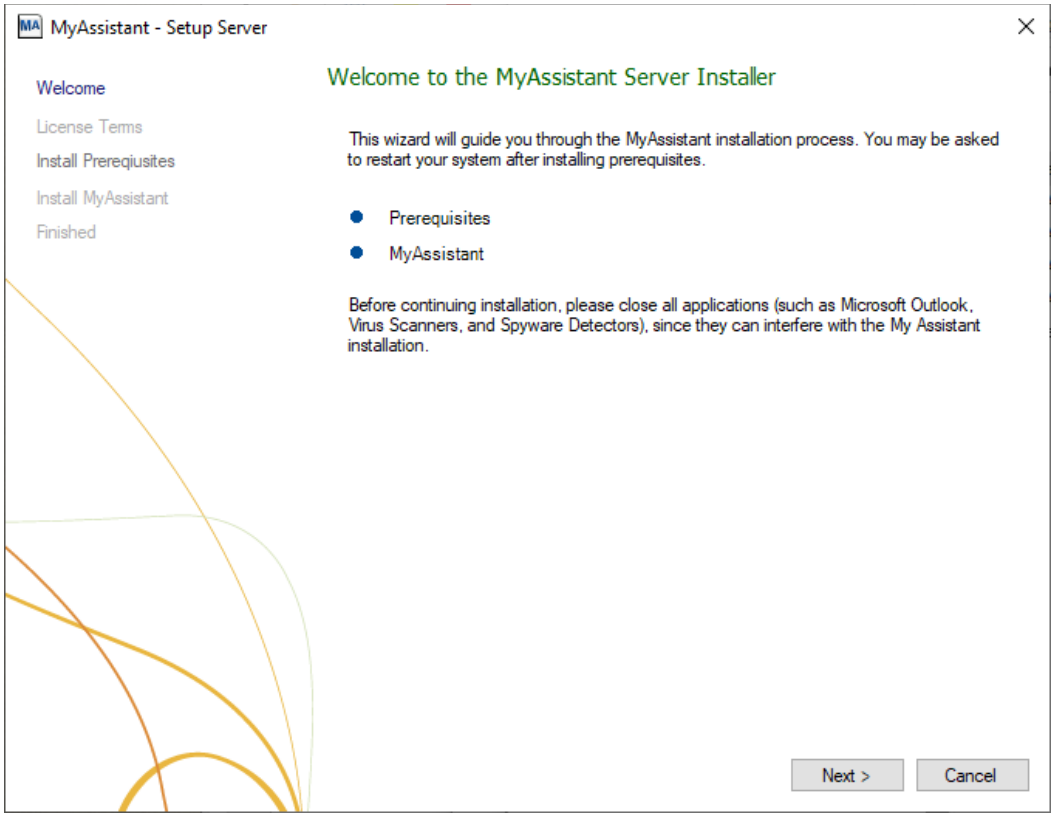
Perform the following to begin the MyAssistant Server software upgrade:

1. (Optional) Log in to the MyAssistant server using a Windows account with Administrator permissions. You do not need to do this step if you already logged in as an administrator to back up your MyAssistant database.
2. Confirm that you have closed all applications and disabled any anti-virus or Firewall software that may be running on the server.
3. Download the MyAssistant installation files using the Sage software link and save the .ZIP file to a folder on your machine. Consider saving the .ZIP file to a shared folder that can be accessed from all workstations with MyAssistant is installed.
4. Unzip the MyAssistant Installation files, then open the unzipped folder and double click autorun.hta to open the installation hub:

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

Step 1 – MyAssistant Server Upgrade

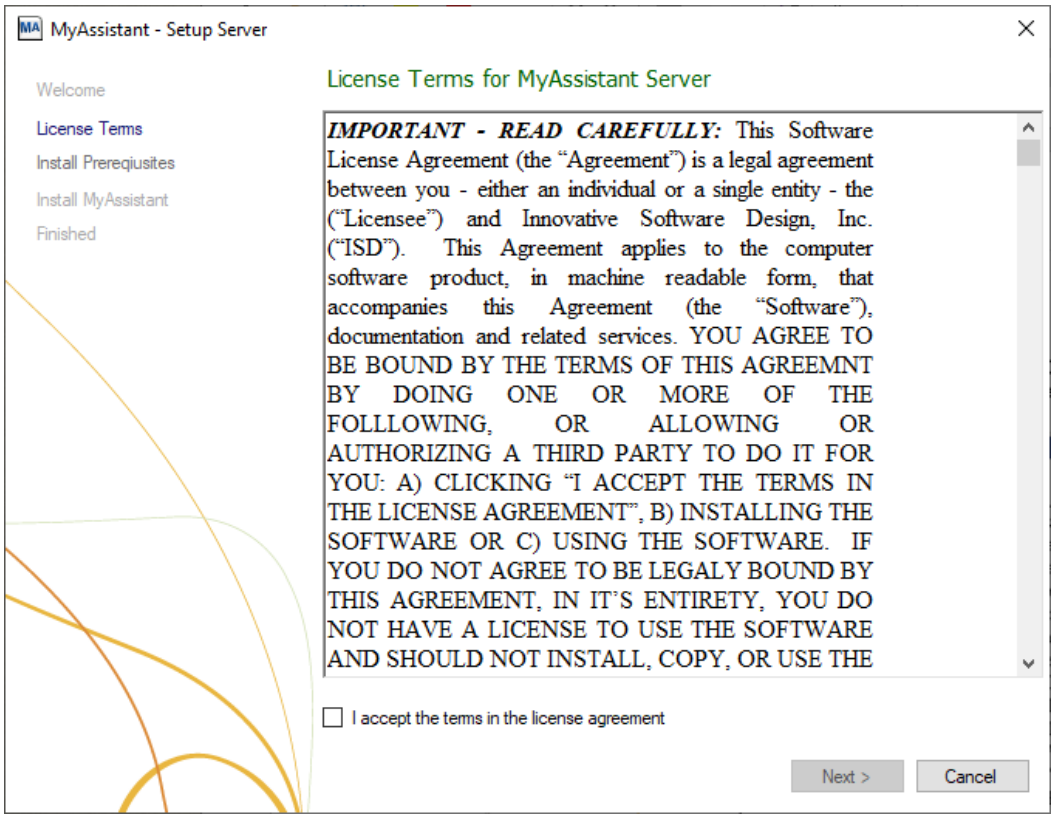
This window opens after selecting [**Install Server**]:



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 any prerequisite software MyAssistant needs to be upgraded. Click [**Next**] to update your prerequisite software. If no prerequisite software needs to be upgraded, this step will be skipped.

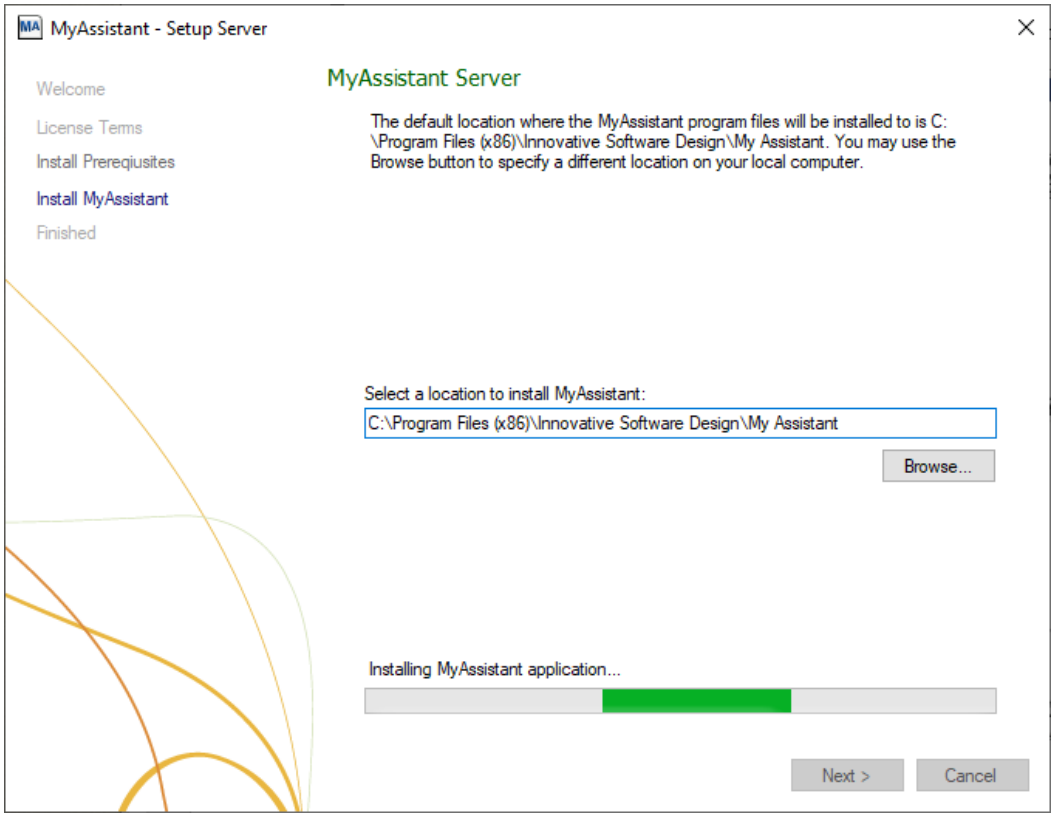
The most common software needing to be upgraded is Microsoft SQL Server. The MyAssistant Server upgrade installs MS SQL Server 2019 Express – prior to installing, confirm it's compatible with any previously installed versions on the same machine.

If you do not want to upgrade SQL Server Express, check the box next to "**Do not upgrade SQL Server Express**" and click [**Next**].

Only check the "**Do not upgrade SQL Server Express**" box if you or your IT already installed a version of SQL Server 2016 or later to use with MyAssistant (including any full versions of SQL Server your company has purchased).

Step 4 – MyAssistant Software

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

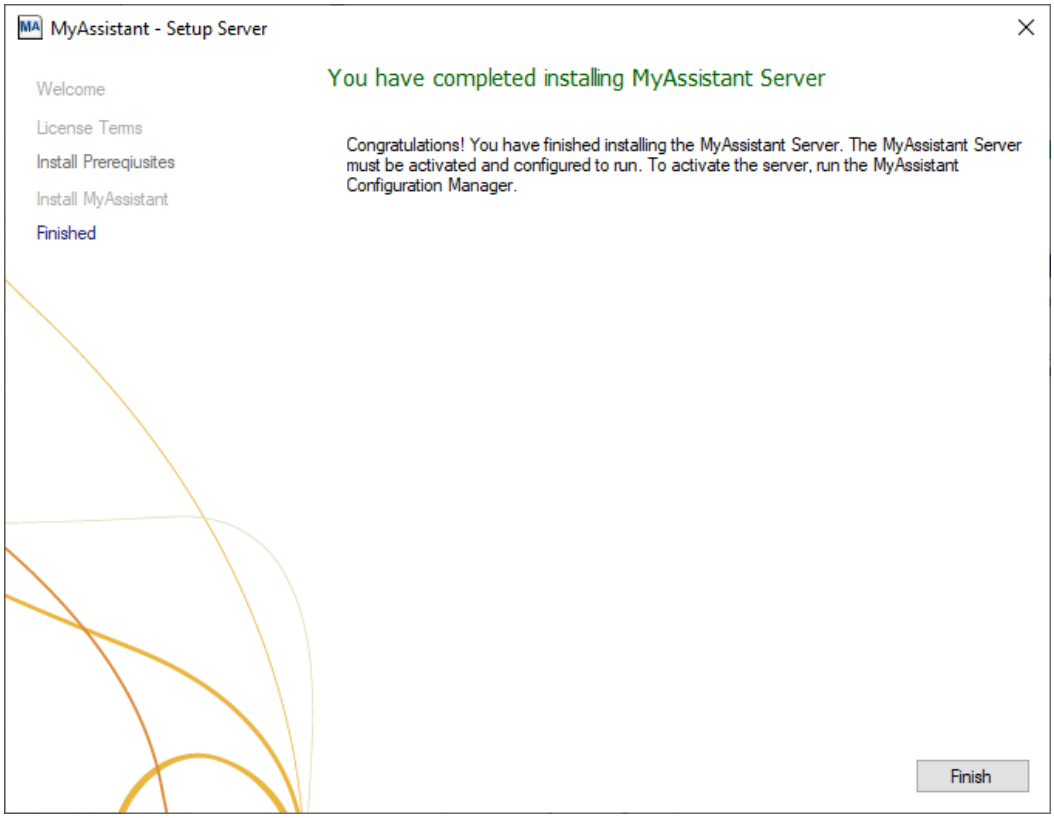


Accept the default location or click [**Browse**] to specify one. Accepting the default location is recommended unless MyAssistant was previously installed in a custom location.

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

Step 5 – You Have Completed Upgrading the MyAssistant Server

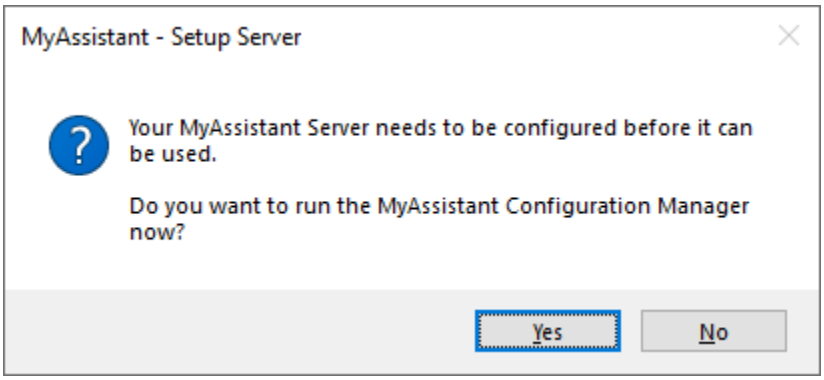
Congratulations, the MyAssistant Server software upgrade is complete:



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

Step 6 – Start the MyAssistant Server Configuration Manager

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



You must complete the MyAssistant Server Configuration Manager before upgrading MyAssistant on any workstations.

Click [**Yes**] to continue.

Chapter 3 – MyAssistant Server Configuration

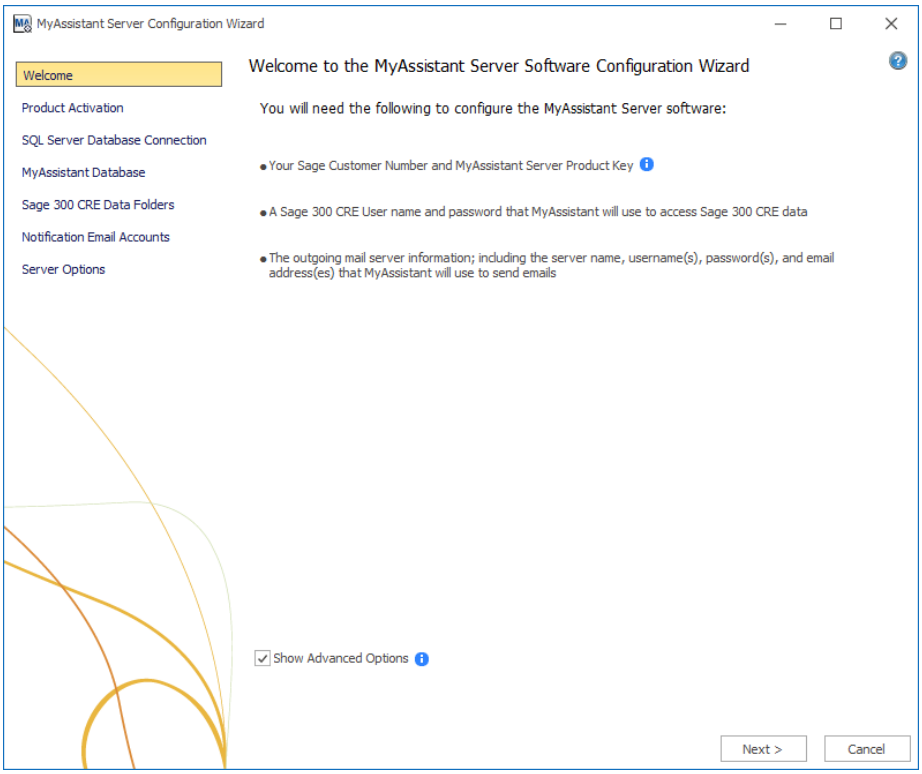
This chapter walks through the MyAssistant Server Configuration Wizard, where you will complete the following:

1. Upgrade your MyAssistant database
2. Confirm Sage data folder file paths
3. Verify the mail server settings for sending emails with MyAssistant
4. Confirm the MyAssistant Server settings

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

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**.



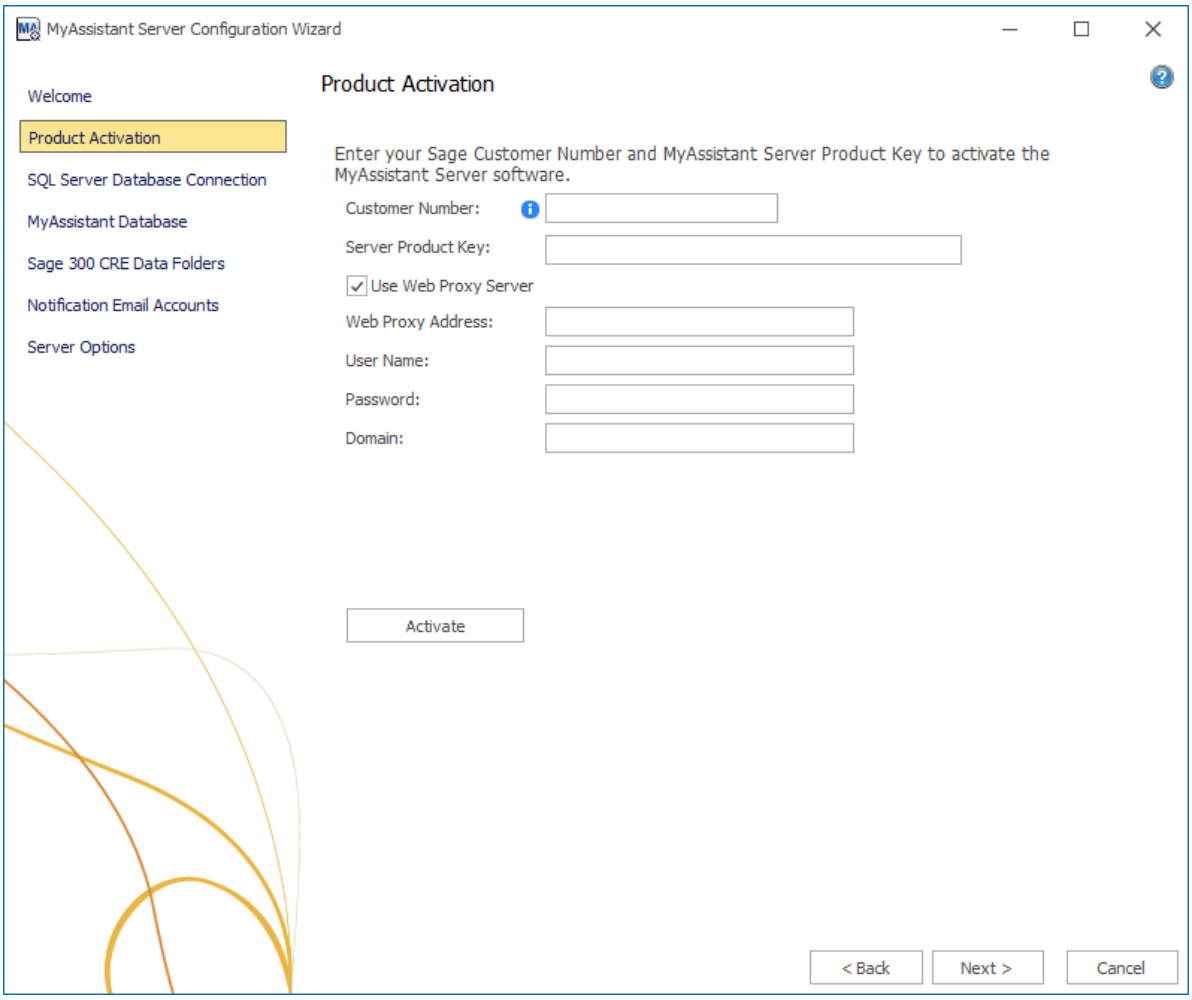
Only check **Show Advanced Options** if you are using a Web Proxy Server or need to update the connection to the Microsoft SQL Server instance with the MyAssistant database. It is highly recommended you do not change the SQL Server connection settings.

Click [**Next >**] to continue.

Step 2 – Product Activation

Confirm the Customer Number & Server Product Key previously entered.

In the event the Customer Number and/or Product Key were not retained in the software upgrade, re-enter them & click [**Activate**].



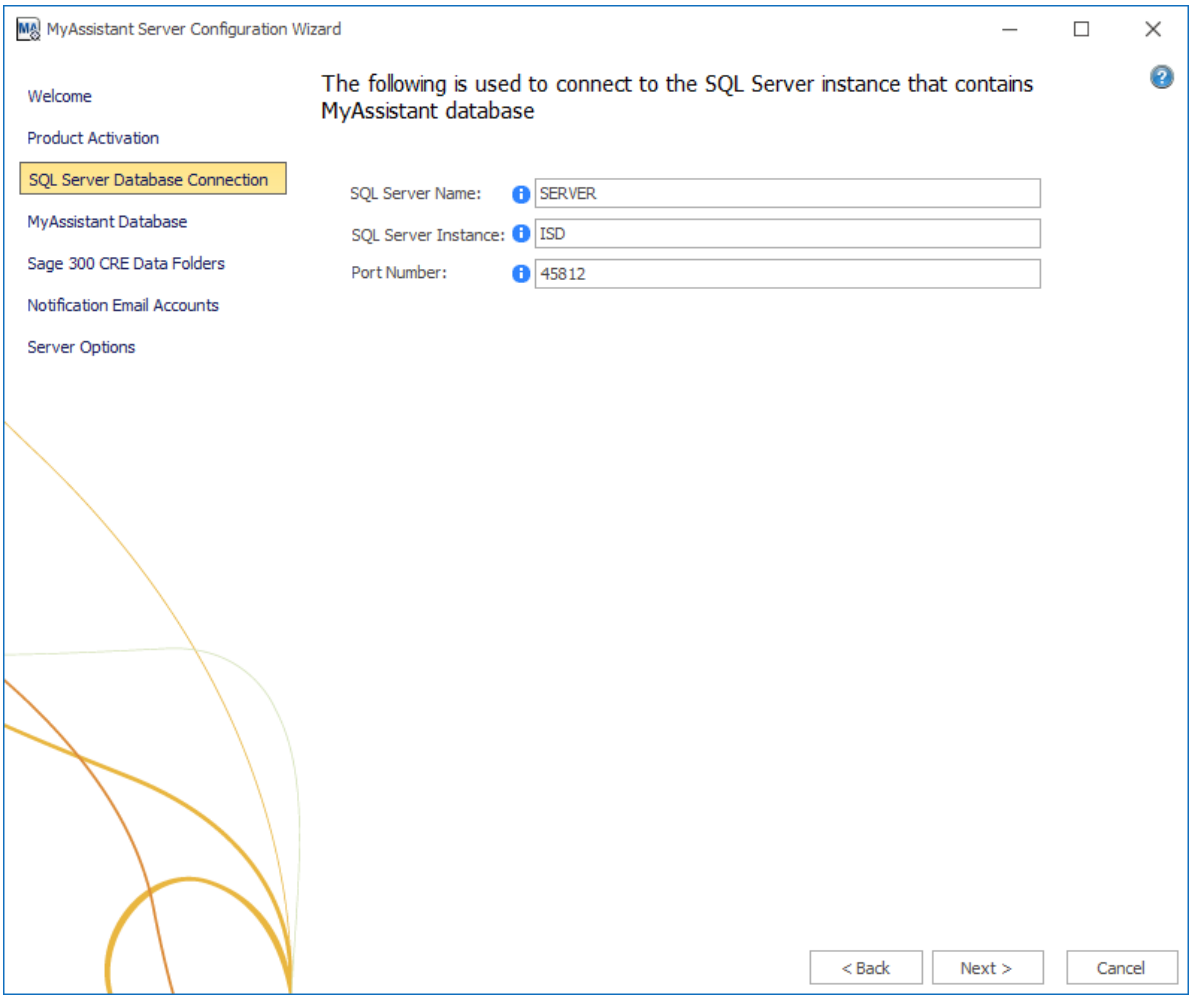
If you use a Web Proxy Server, check the box displayed under the Server Product Key field and verify that the information entered is accurate.

The "**Use Web Proxy Server**" checkbox will only appear if you checked the "**Show Advanced Options**" checkbox in the Welcome step (Step 1).

Click [**Next**] to continue.

Step 3 – Database Connection

This will only be available if you check the "**Show Advanced Options**" checkbox in the Welcome step. This step will have all previously entered information prefilled.

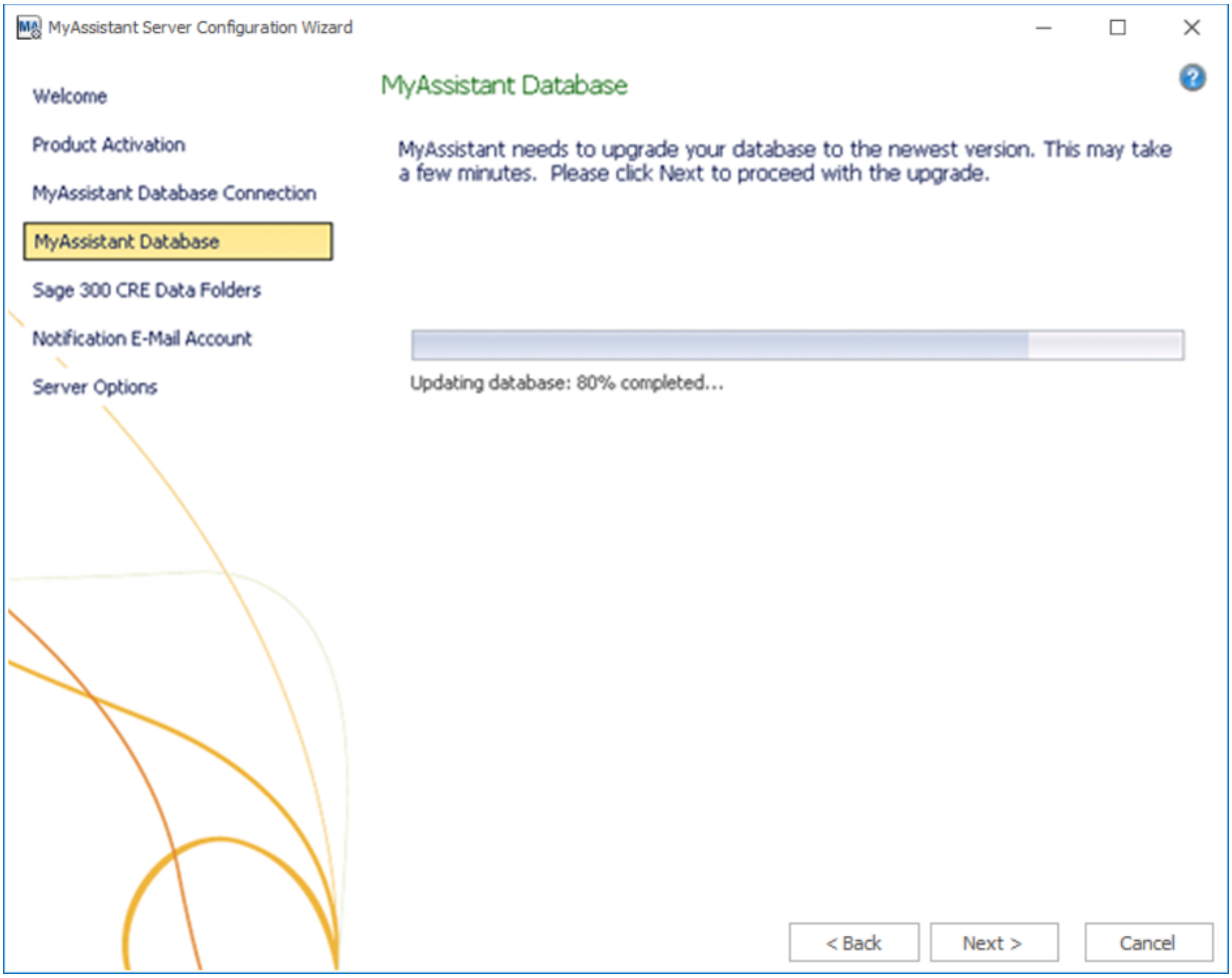


It is highly recommended that you do not make any changes in this step, as it could break the connection to the MyAssistant database. Modifying these fields requires advanced knowledge of SQL Server database engines.

Click [**Next**] to continue.

Step 4 – Upgrade the MyAssistant Database

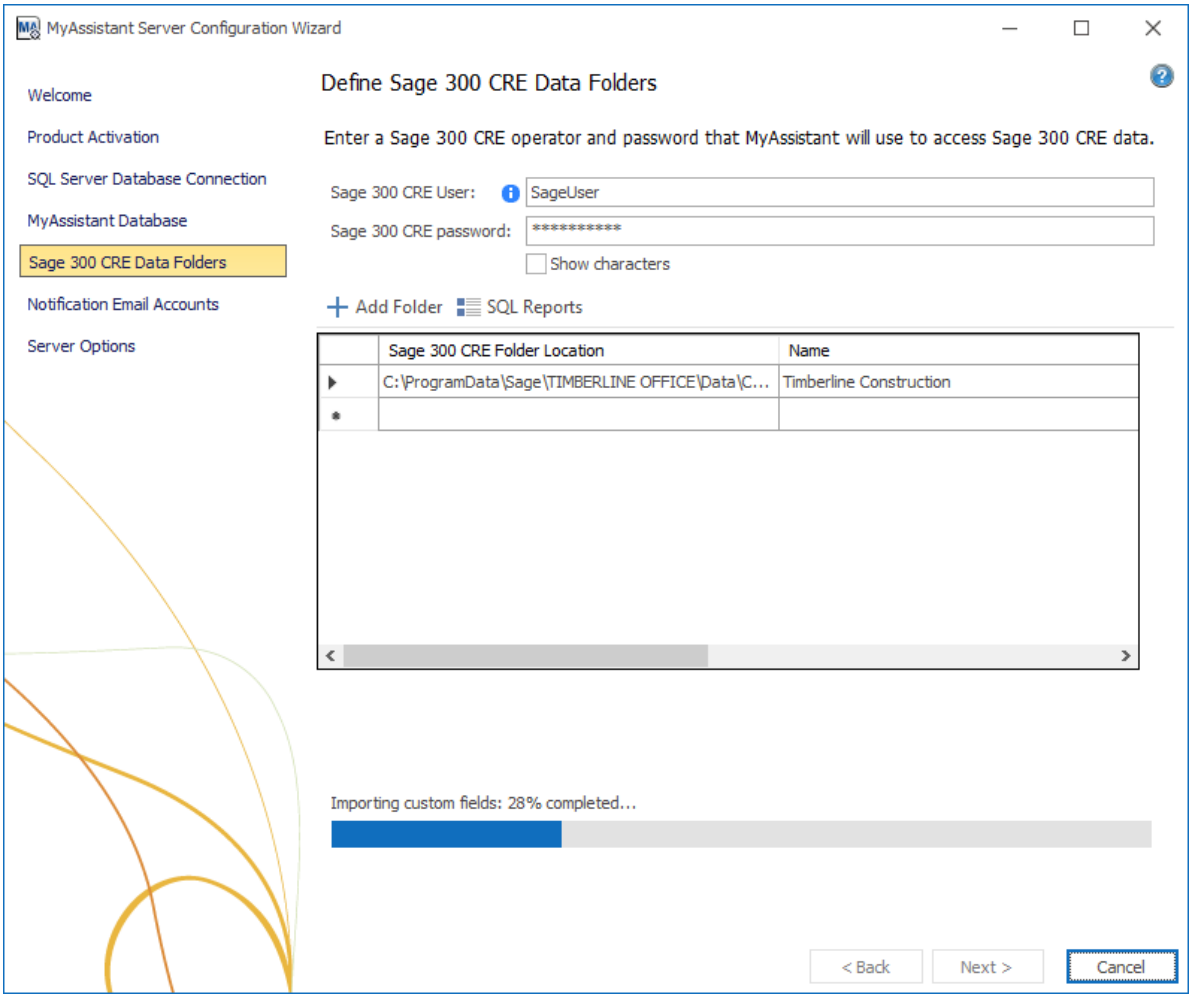
Click [**Next**] to upgrade the MyAssistant database.



The Server Configuration Wizard will automatically advance to the next step when the database upgrades complete.

Step 5 – Sage 300 CRE Data Folders

Verify the Sage User, password and Sage Data Folder paths are correct:

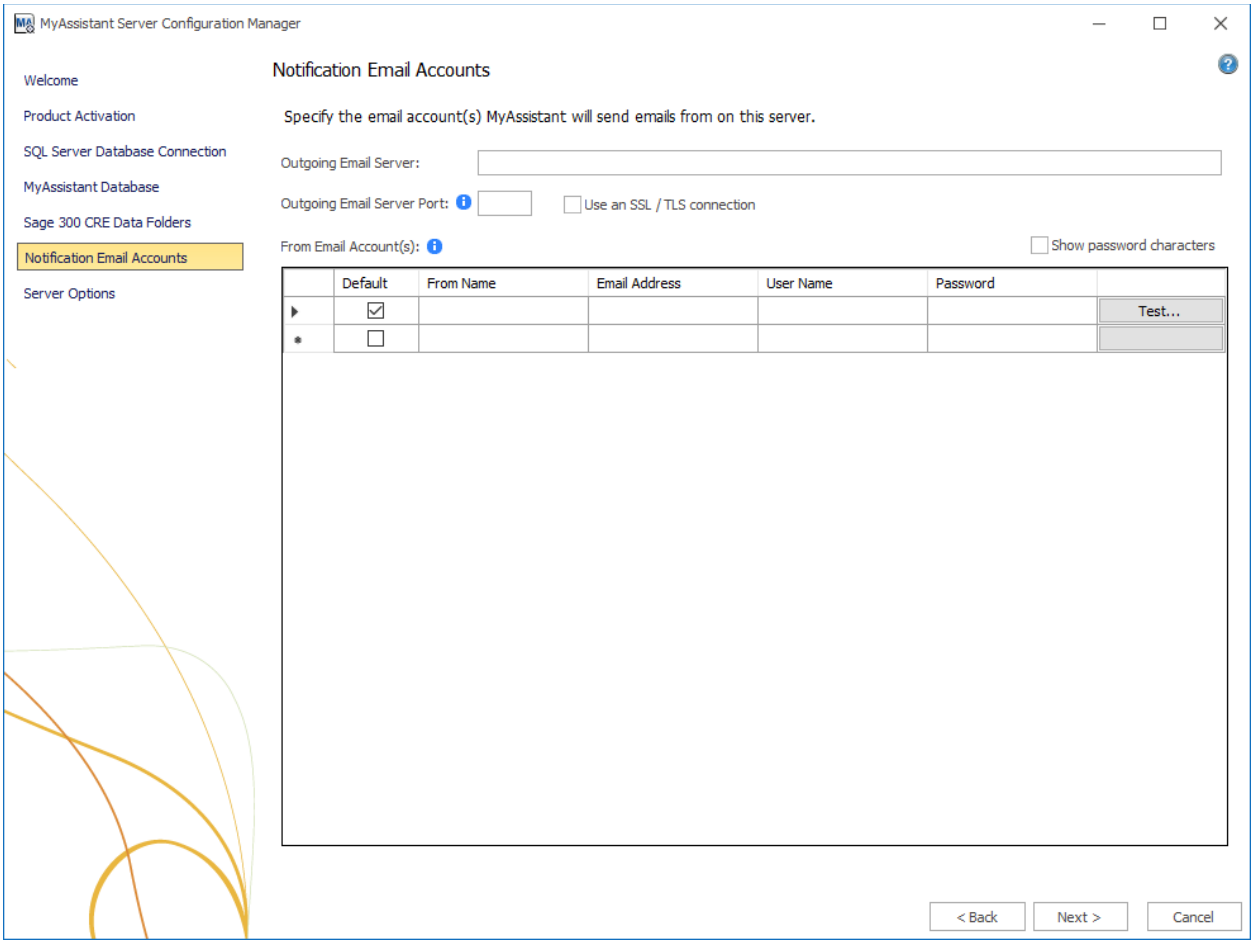


Click [**Next**] to continue. If MyAssistant is monitoring more than one Sage folder, you will be prompted to select which folder's database customizations to import. If only one Sage folder is specified, the process begins automatically.

A warning will appear if the Sage 300 CRE password is set to expire; asking if you want to continue. If you select "Yes", the new password will need to be updated in the MyAssistant Server settings after it is changed. Using a Sage user with a password set to never expire is recommended.

Step 6 – Notification E-Mail Account

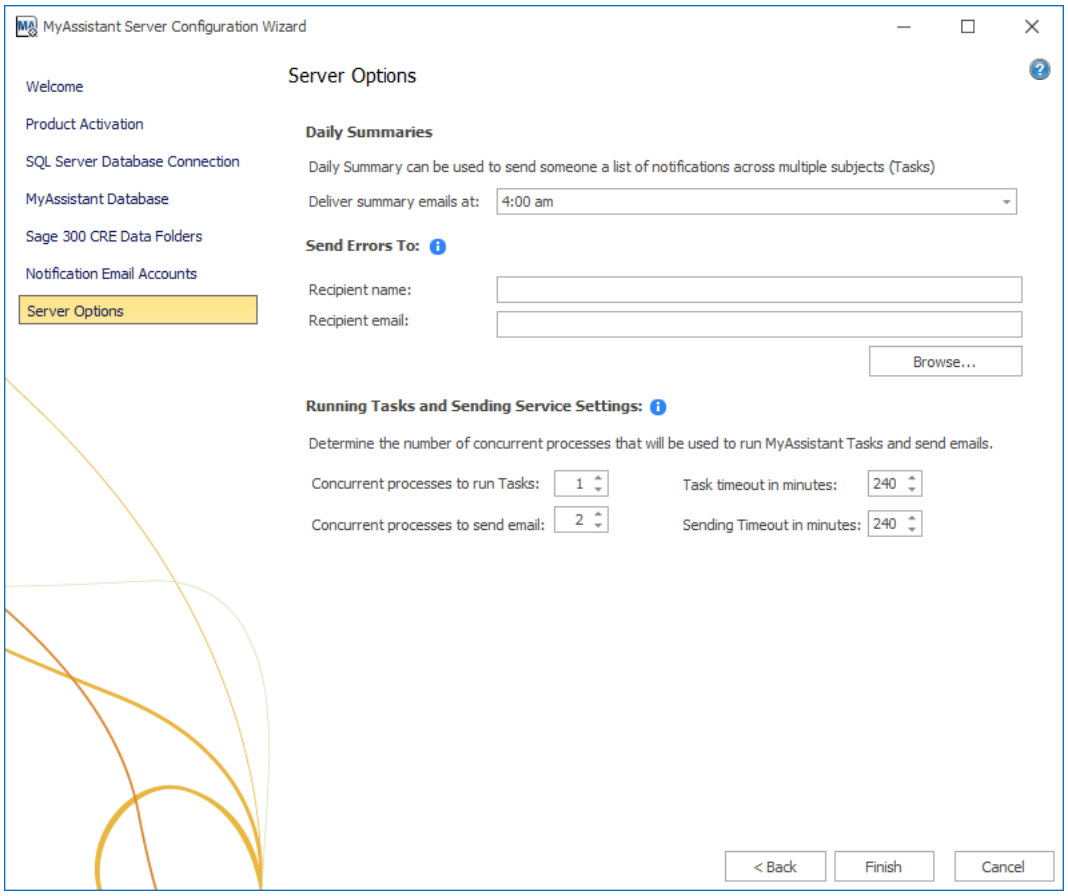
Verify your mail server settings are still accurate, or update them if they have changed:



Click [**Next**] to continue.

Step 7 – Server Options

Confirm or update the previously entered Server Options:



Daily Summaries: MyAssistant Daily Summary email messages are used to send each recipient their information from several Tasks in one email message. See the MyAssistant User Guide for more information. This time should be after all scheduled Tasks run.

Send Errors To: Someone to be notified when MyAssistant encounters an error. It is recommended to send error messages to the primary MyAssistant user.

Running Tasks and Sending Service Settings:
MyAssistant runs Tasks and creates & sends sends emails via background processes (i.e. Windows Services) on the server. These processes are scalable to increase performance and auto-correct in the event of a hang. See the MyAssistant User Guide for more information about these processes.

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

The MyAssistant Server has been upgraded and configured. Continue to Chapter 4 for upgrading MyAssistant Workstations.

Chapter 4 – Upgrading MyAssistant Workstation Software

If you use MyAssistant a Terminal or Citrix Server, or if you use MyAssistant on the same computer where the MyAssistant Server software is installed, please go to Chapter 6.

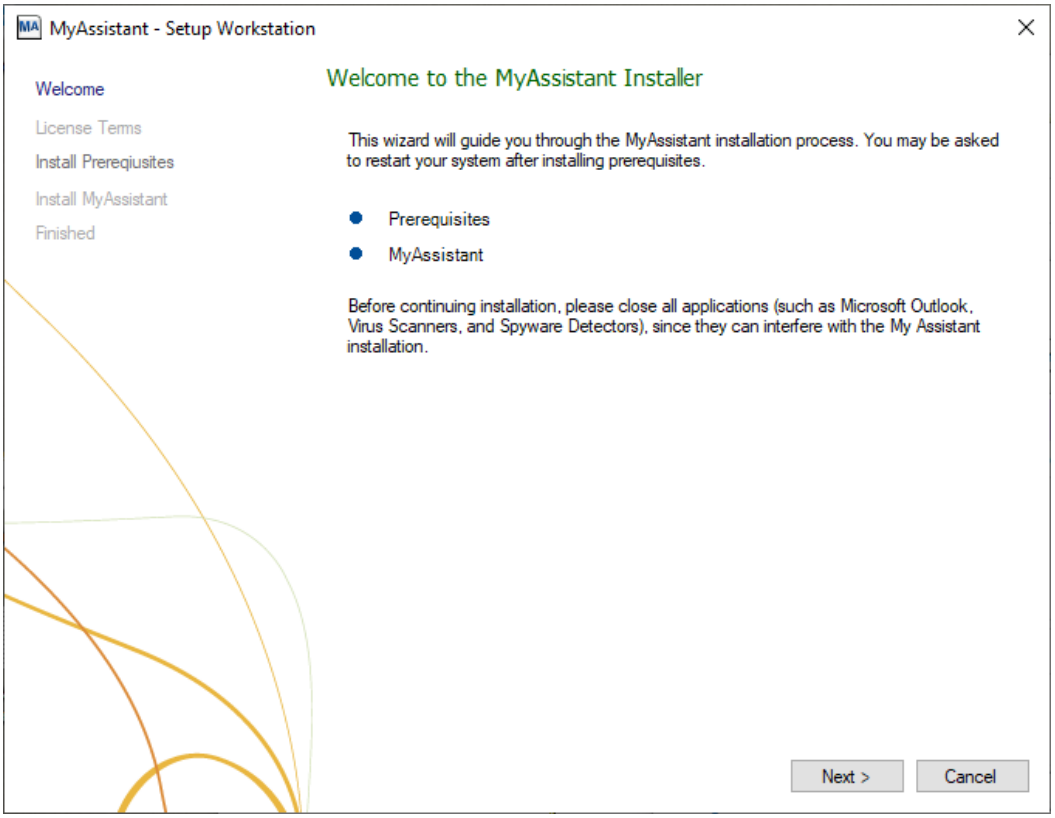
Perform the following to begin the MyAssistant Workstation software upgrade:

1. Log on to the computer where the MyAssistant workstation is installed as the Windows user with MyAssistant activated.
2. If accessible from the Workstation, open the same folder of unzipped MyAssistant install files used to upgrade the MyAssistant Server software. If not, re-download the install files and unzip the folder.
3. Open the unzipped folder and double-click autorun.hta

Click [**Install Workstation**]

Step 1 – Welcome

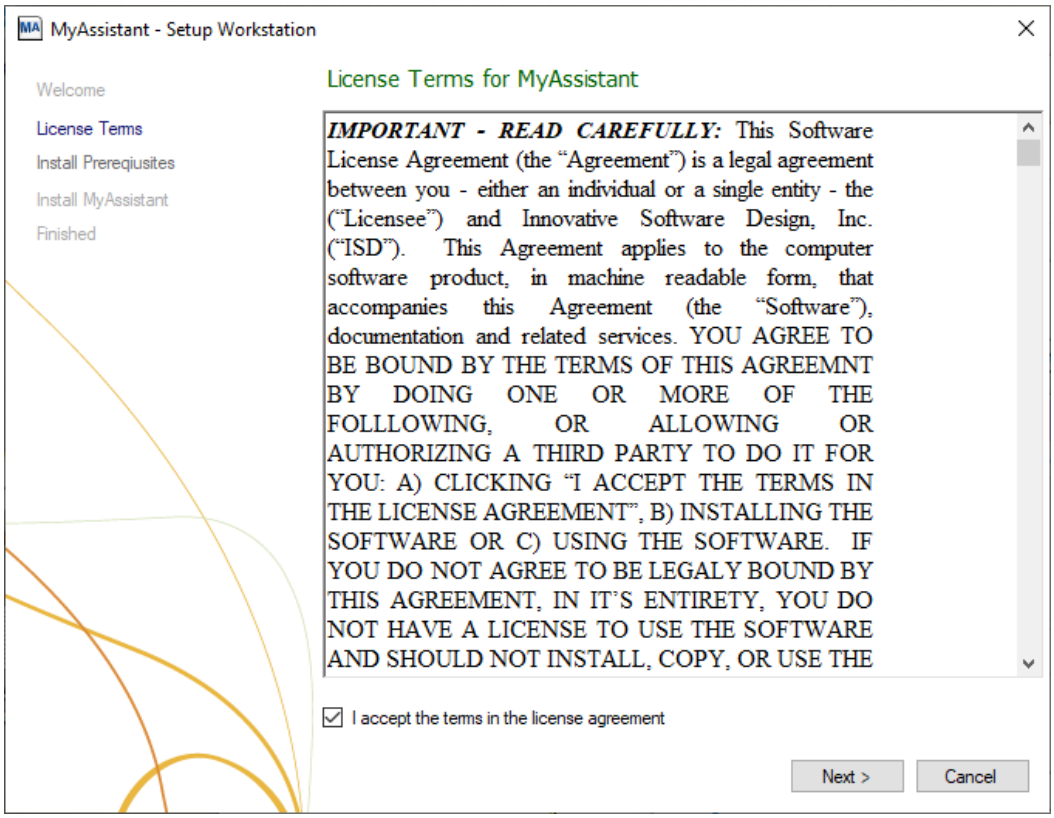
This window opens after clicking [**Install Workstation**]:



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.



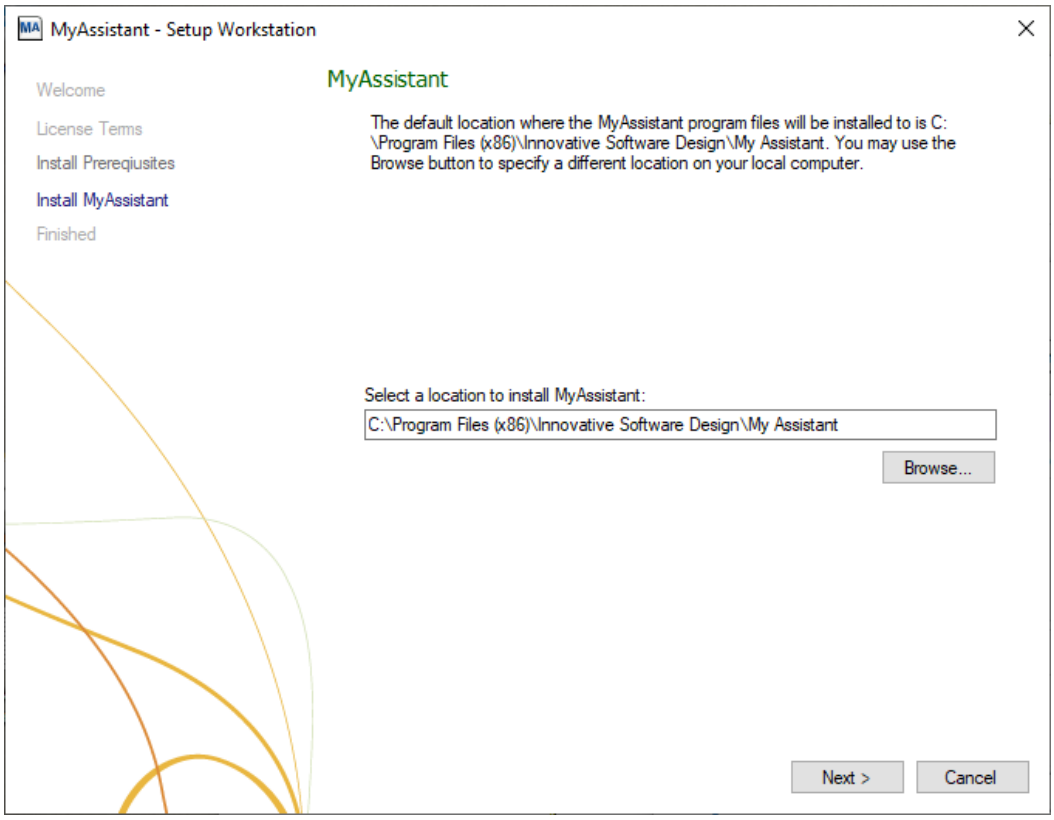
Click [**Next**] to continue.

Step 3 – MyAssistant Workstation Prerequisites

This window displays any prerequisite software MyAssistant needs upgraded. Click [Next] to update your prerequisite software and continue to the next step. If no prerequisite software needs to be upgraded, this step will be skipped.

Step 4 – Install the Software

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

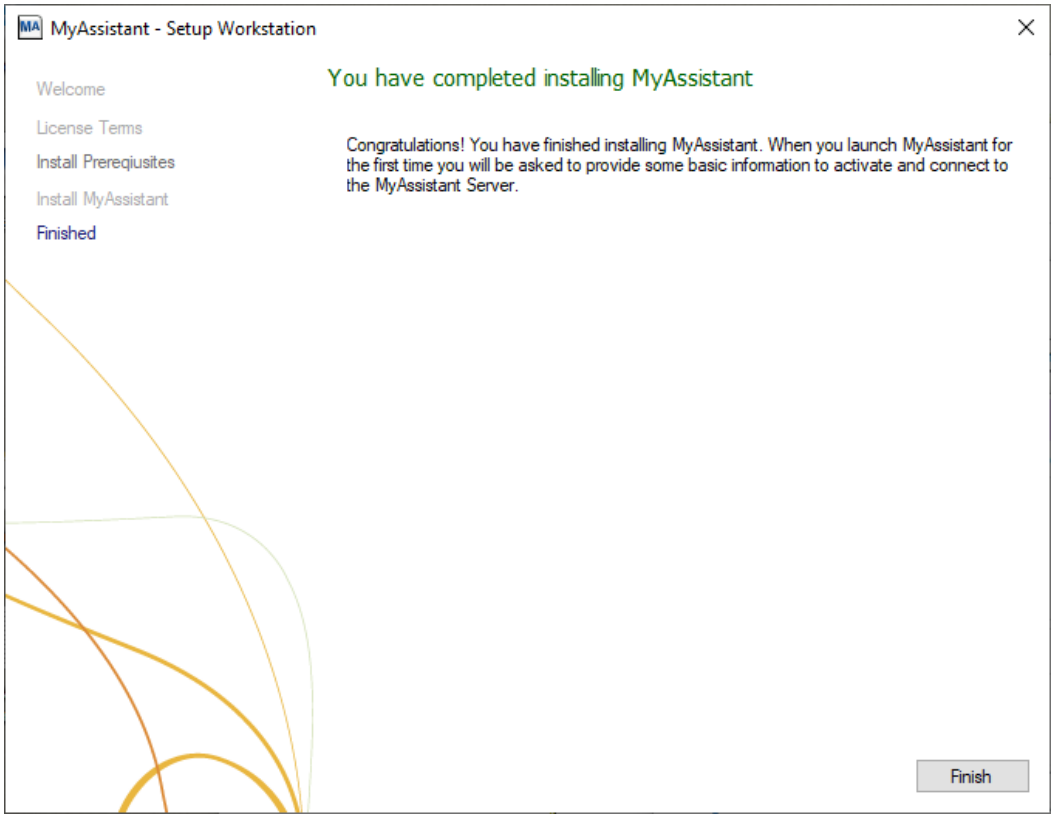


Accept the default location or click [**Browse**] to specify one. Accepting the default location is recommended unless MyAssistant was previously installed in a custom location.

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

Step 5 – You have Completed Installing MyAssistant

Congratulations, the MyAssistant Workstation upgrade is complete.



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

Step 6 – MyAssistant Workstation Configuration

After upgrading a MyAssistant workstation, the software should be available for immediate use by double-clicking the icon on the desktop.

In the highly unlikely event that MyAssistant requires an upgraded workstation to be configured, please complete the MyAssistant Workstation Configuration Wizard per the steps in the MyAssistant Installation Guide.

Chapter 5 – Upgrading a Terminal Server

This chapter is for companies who use the MyAssistant workstation for one or more Windows users on a Terminal or Citrix Server. If you use the MyAssistant workstation on the same machine as the MyAssistant server software, no further action is required.

What is Involved

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

1. Log on to the terminal/Citrix server as a Windows User with Administrator-level permissions
2. Determine if the MyAssistant Server software is installed on the same computer
    - Click the Windows Start button
    - Type “Services” into the search bar
    - Select Services from the list of results
    - Scroll down the list and look for “ISDAdminTaskService” and “ISDAdminSenderService”
        - If one or both are there, the MyAssistant Server software is installed on this machine
3. If the MyAssistant Server software is installed on the server, upgrade the MyAssistant Server using the steps in chapters 1-3. Continue to step 5.
4. If the MyAssistant Server software is not installed on this server, perform the MyAssistant workstation upgrade outlined in Chapter 4.
5. Log on to this server as a Windows user who uses MyAssistant
6. Open the MyAssistant user Application
7. If needed, confirm previous settings for user configuration

Chapter 6 – Test the Upgrade

Confirm MyAssistant is working properly by testing the following:

Access to Sage 300 CRE Data

1. Open the MyAssistant Designer software
2. Open an activated MyAssistant Task
3. Move to the Email step in Task Setup
4. Expand the very first record in the list of available Sage 300 CRE database records (on the right side of the window)
5. Right click on the first field and select [Browse Data] – the data contained in the field should appear in a new window

Troubleshooting

1. If clicking [Browse Data] returns an error:
    a. In the main MyAssistant window, select File > [Options]
    b. Click [Sage 300 CRE Data Folders] on the left side of the window that opens
    c. Click [Test Connection] to confirm that the Sage 300 CRE User Name and Password entered are able to access the Sage data. If the test fails, update these credentials.
    d. Contact Sage Support if you believe the user name and password are correct but you still cannot browse data.
2. If clicking [Browse Data] results in a blank Browse Data window, that field may not have data. Try another field in the same record.

Run Tasks and Receive Email Messages

1. Open the MyAssistant software.
2. Find an activated Task. If possible, select a Task that is being sent to you (or change the recipients on a Task in the Email step of Task Setup).
3. Right click on the Task and click [**Run and Send**].

Troubleshooting

1. If the Task doesn't finish running:
    e. Log onto the MyAssistant Server.
    f. Open the Windows Services window (Start > Run > type: Services.msc).
    g. Look for the ISDAdminTask and ISDAdminSender services. Confirm both are started.

2. If the Task finishes running but an email is not received:
    a. Click the Reports tab, then [Notifications Not Sent]. If you see Notifications, click the Refresh button once every thirty seconds until you see "No notifications to send."
    b. If you still don't receive an email:
        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 the Sage 300 CRE software.
        e. Click [OK] and then restart the Service.

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.

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.

Education & 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.