

Sage Timberline Office MyAssistant Release Highlights

MyAssistant provides each employee a personal assistant to help them stay informed, be proactive and increase their productivity. Each employee can now use MyAssistant to quickly access information or “*Check For...*” something in Sage Timberline Office, right from the Windows Desktop. As a personal assistant, MyAssistant can communicate with others (vendors, tenants, or employees) for you and extend your workflow processes by taking additional actions at the end of a Sage Timberline Office task.

Important: If you are using Sage Timberline Office 9.8, you should install MyAssistant 9.8.1. If you are using Sage Timberline Office 9.7, you should install MyAssistant 9.7.1. Contact your business partner if you have questions about version compatibility and installation.

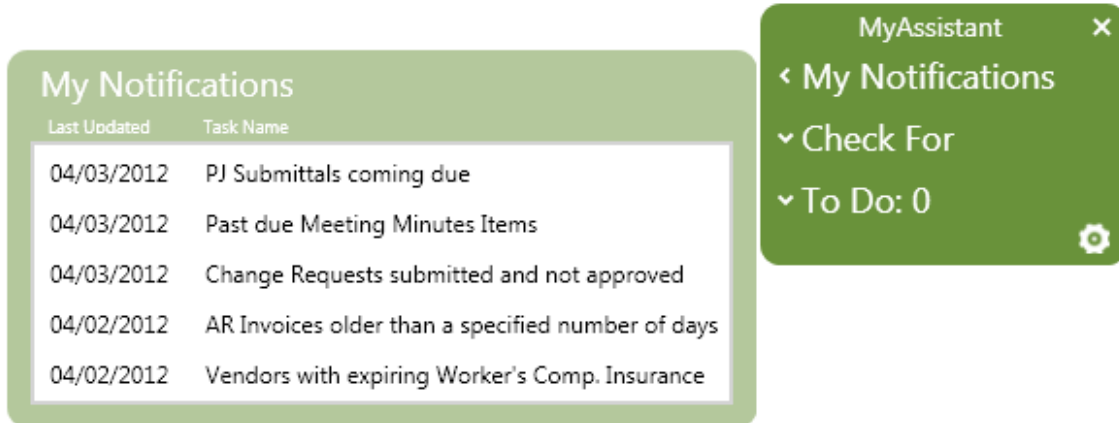
Sage Timberline Office My Assistant contains the following improvements:

- Interact with your project or property accounting information with an intuitive **new look and feel**.
- The **MyAssistant Live Tile** allows you to access your notifications or to check for information right from your Windows Desktop.
- Open the **MyAssistant Quick Viewer** from your Windows Desktop to access information in Sage Timberline Office.
- Use **special fonts, color or shading** to highlight selected information in email messages or your notification log.
- Organize your **information into groups**.
- Use the **Filter or Find** (keyword search) options to quickly find the information you need.
- See all notifications for a job, customer, vendor, tenant, etc. with a new **Arrange By** option.
- Work with Sage Timberline Office data to Excel with a new **Open in Excel** option.
- Send a list of notifications with the **Export to PDF** feature.
- **Password Protect** reports distributed with MyAssistant.
- Automate **additional workflow steps** by scheduling MyAssistant Tasks to run at the completion of a Sage Timberline Office program.
- A **To Do list** in the MyAssistant Live Tile tracks tasks you may want to run given your work in Sage Timberline Office.
- Quickly activate MyAssistant Tasks with a **new Setup Wizard**.
- Use your **Microsoft Word** documents to create MyAssistant email messages.
- Send personalized letters to vendors, customers, and tenants with the **MyAssistant mail merge** capability.
- Access Sage Timberline Office information when you are out of the office by receiving MyAssistant emails on your **Smart Phone**.
- A new **person-centric Notification log** in the Sage Desktop.
- **Set Reminders** from your personalized log.
- Simplify installation and configuration with a new configuration application.

MyAssistant Training - Take advantage of the complimentary *Getting Started with Sage Timberline Office MyAssistant* Replay Learning class from [Sage University](#) to learn or refresh your skills. Register Now!

Tip: [Create a Sage University profile](#) before you register.

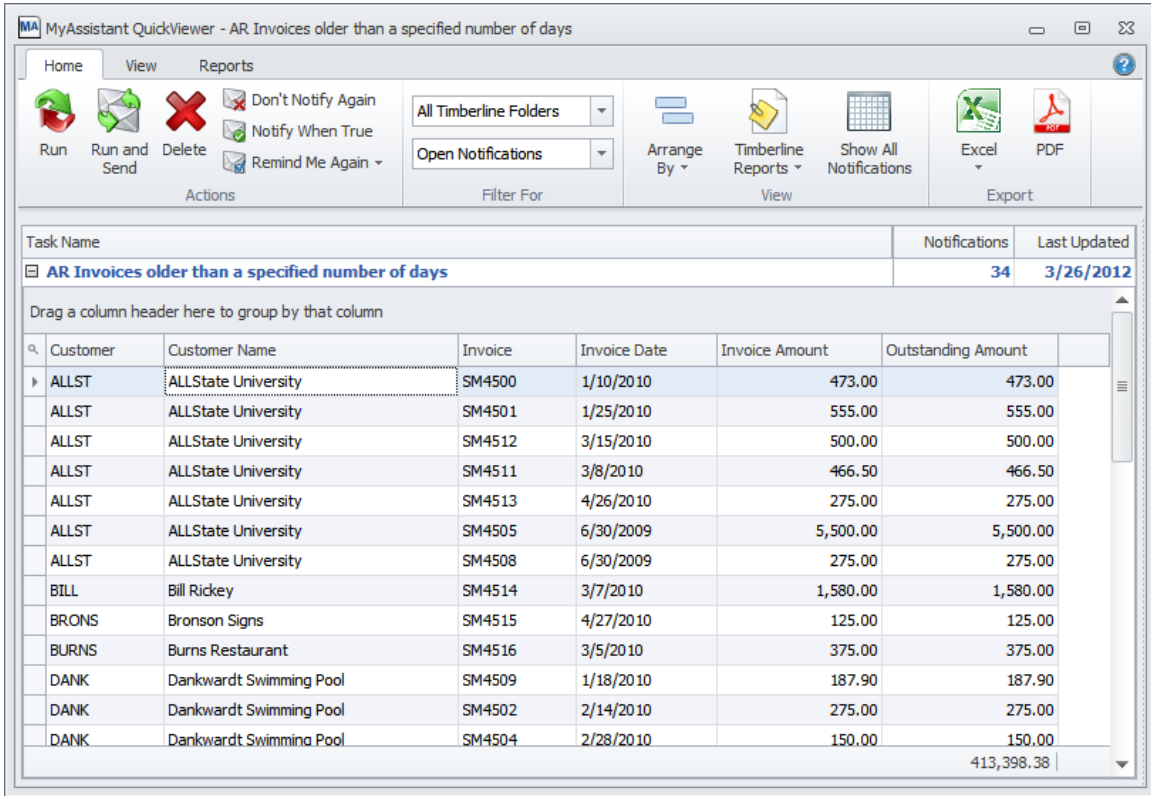
MyAssistant Live Tile



The MyAssistant Live Tile can be available on each person's Windows Desktop. The tile allows you to view or check for something just by turning on your computer. The MyAssistant Live Tile provides options for:

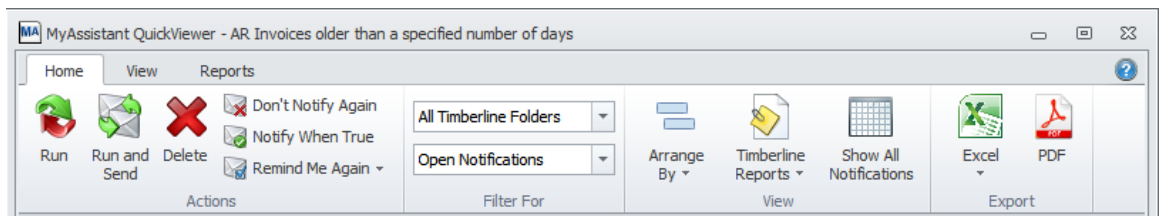
- See a list of issues that MyAssistant has brought to your attention with the **My Notifications** option.
- Select **Check For** to have MyAssistant search through Sage Timberline Office for something.
- **To Do** displays a list of things you may want to do based on your work in Sage Timberline Office.

MyAssistant QuickViewer



The QuickViewer provides an easy way to access the Sage Timberline Office information you need. Available from your Windows desktop with the **My Notifications** and **Checking For** options, you will find the QuickViewer to be a powerful, yet easy to use information access tool. Some of the highlights of the QuickViewer are:

- A ribbon to provide easy access to the MyAssistant options.



- The ability to customize your list by moving columns around or dragging columns into the group-by box to organize the list by those values.

Task Name

AR Invoices older than a specified number of days

Customer ▲

Customer Name	Invoice	Invoice Date	Invoice Amount
Customer: ALLST			
ALLState University	SM4500	1/10/2010	473.00
ALLState University	SM4501	1/25/2010	555.00
ALLState University	SM4512	3/15/2010	500.00

- Sort the list by clicking on a column heading.
- Filter your list using the column filters.

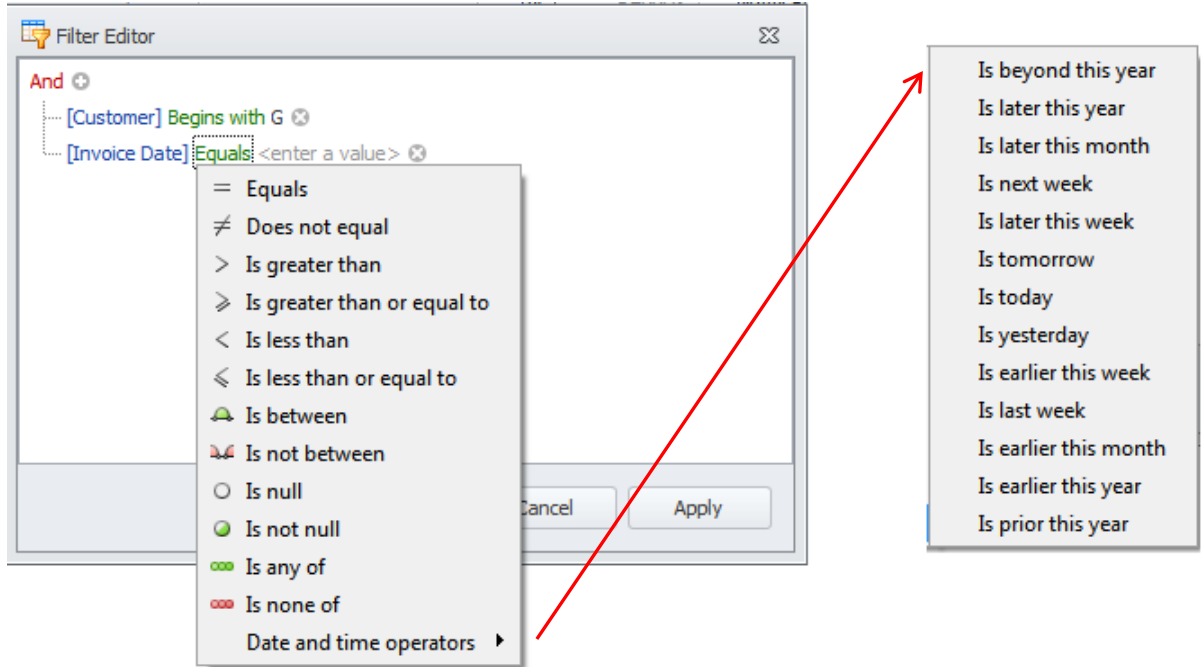
Task Name

AR Invoices older than a specified number of days

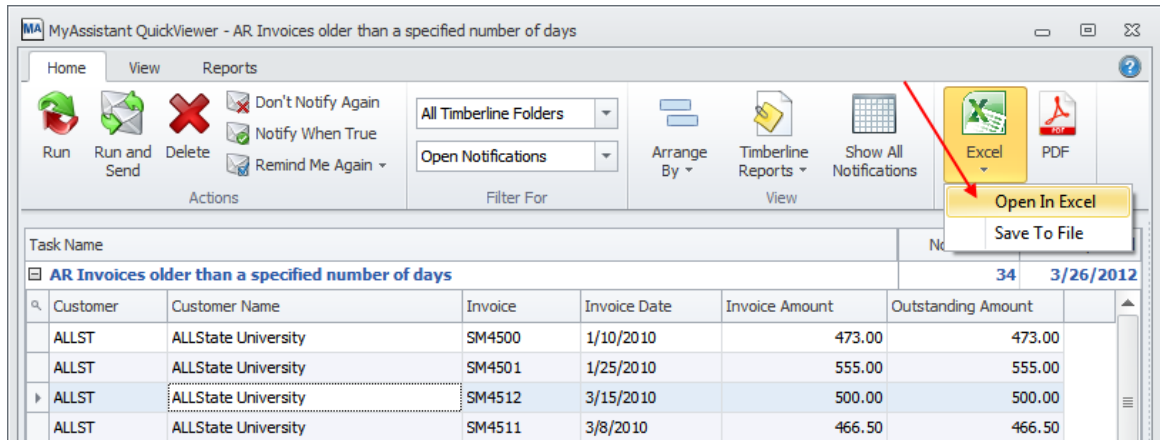
Customer	Customer Name	Invoice	Invoice Date	Invoice Amount
ALLST	(Custom)			
ALLST	(Blanks)	SM4500	1/10/2010	
ALLST	(Non blanks)	SM4501	1/25/2010	
ALLST	ALLST	SM4512	3/15/2010	
ALLST	BILL			
ALLST	BRONS	SM4511	3/8/2010	
ALLST	BURNS			
ALLST	DANK	SM4513	4/26/2010	

- A Find option allows you to search your notifications for key words.

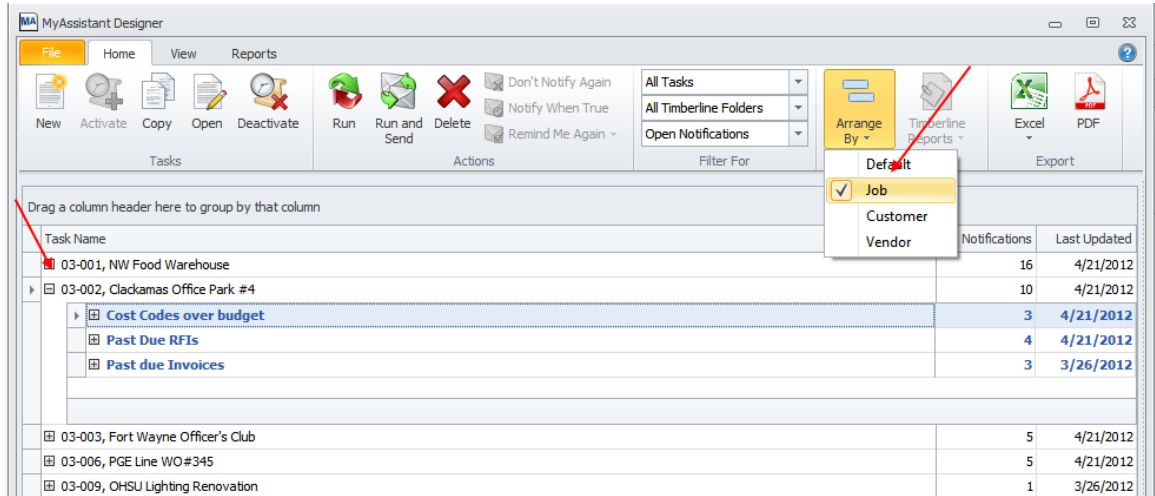
- Defined Filters with simple editor that provides powerful operators.



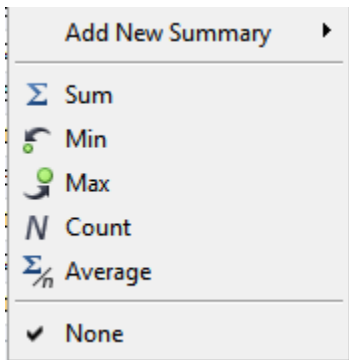
- At any point you can open the list of Sage Timberline Office information in Excel or export it to a PDF.



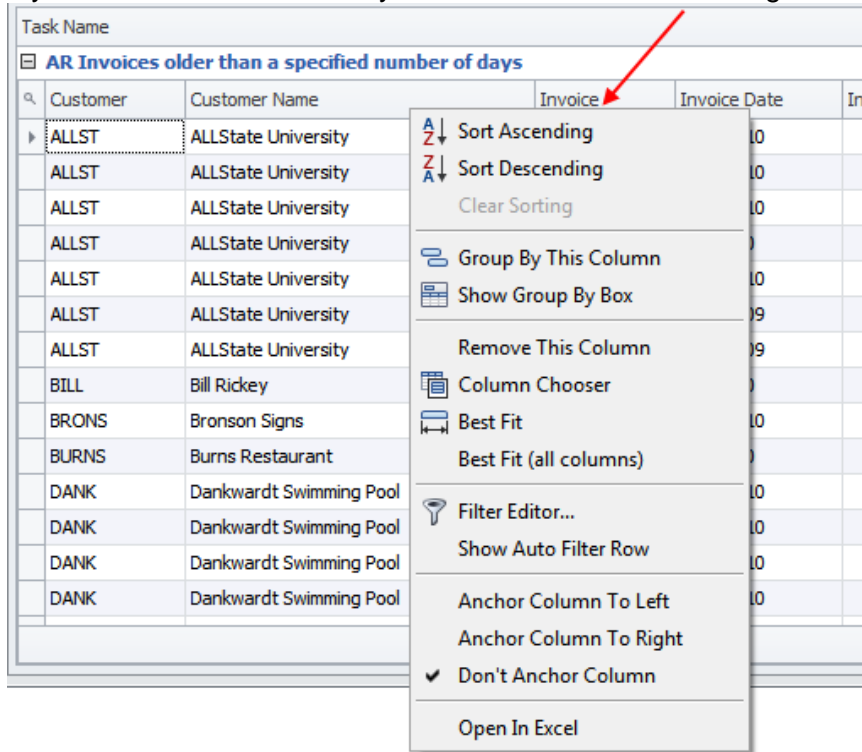
- The Arrange By option sorts your notifications by a selected value (i.e., Job, Customer, Vendor, and Property) across Task / subject. This allows you to see all notifications for a specified job, customer, vendor, etc.



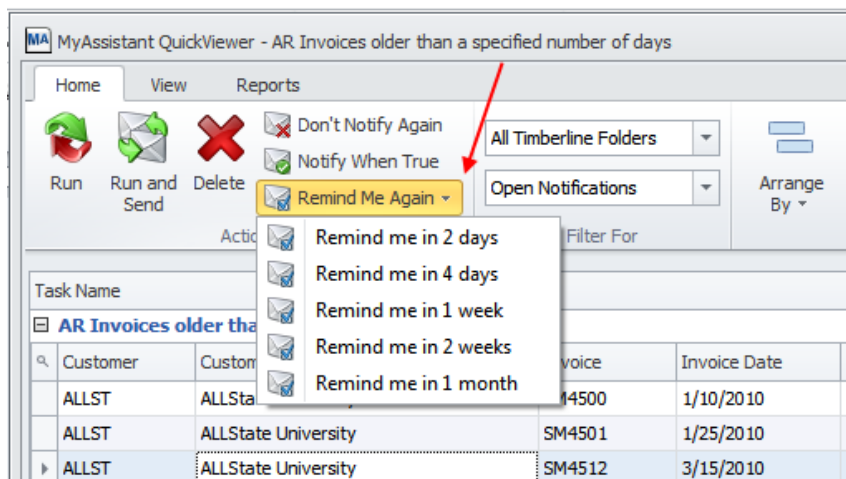
- Right click on the totals row and add Summaries (Sum, Average, Count, etc.).



- Right click on any column heading to see a complete list customization options. MyAssistant will automatically remember each user's changes.



- The Remind Me Again option allows you to be reminded of notifications that are still open in a specified number of days.



New Task Setup Wizard

Creating and activating MyAssistant Tasks just got more powerful, yet easier to use. MyAssistant offers enhanced Task scheduling, email and reporting capabilities with an uncomplicated setup wizard.

General Information Describe and categorize the Task. This is the Sub-category in the Task list.

Condition

Schedule

Email

Additional Information

Notification Options

Name:

Category:

Subcategory:

Description:

- You now can copy and modify prebuilt Conditions as you are setting up new Tasks.

Condition:

- MyAssistant Tasks can now be scheduled to run at the completion of a Sage Timberline Office processes. For example, check AP Vendor insurance status after selecting invoices to pay and before printing checks

Run This Task

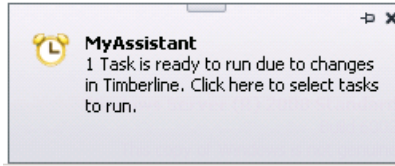
Daily Weekly Monthly Once

At the conclusion of a Sage Timberline Office program

Select a Sage Timberline Office program:

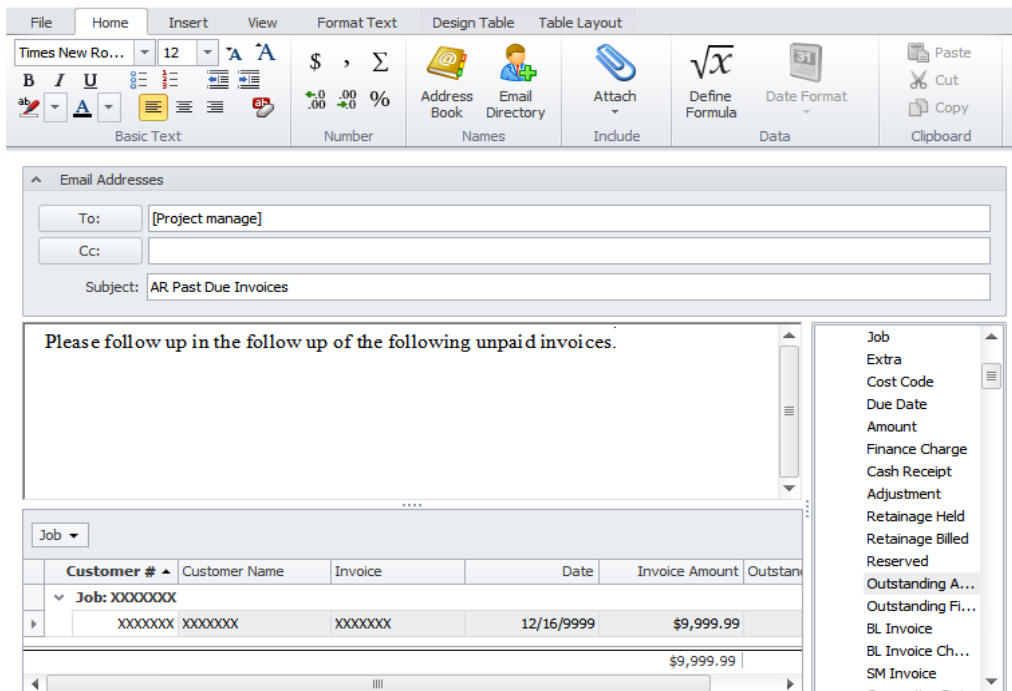
Run the task each time this Timberline process completes:

- When exiting a Sage Timberline Office program (i.e., AP Select Invoices for Payment), MyAssistant checks to see if there are any tasks scheduled to run at the completion of that process. If there are, MyAssistant prompts you to run the MyAssistant Task(s). If you don't respond to the prompt, the Task is added to the To Do list on your MyAssistant Live Tile.



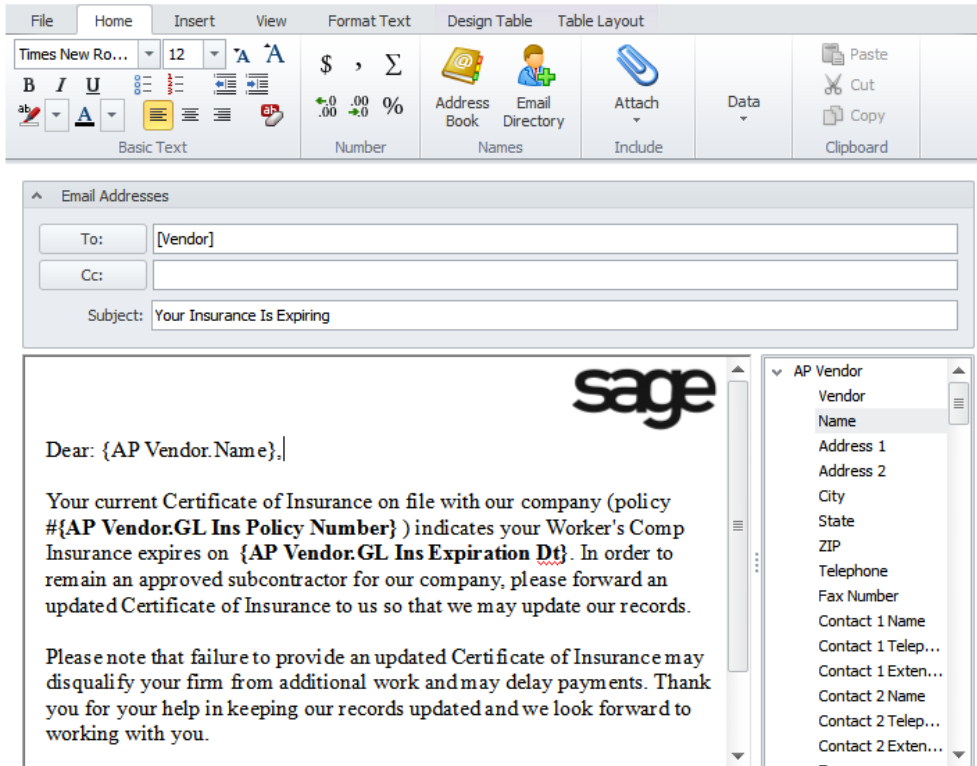
MyAssistant Email Messages

A new Task Email template definition provides many new features.



- Defining the email message and notifications list on one screen.
- A new ribbon makes the email template options very visible.
- The notification list is defined by dragging Sage Timberline Office fields in to the list.
 - Double click on the column heading to change the heading.
 - Drag the column boarder to resize the column width.

- Group notifications by one or more values by dragging the Sage Timberline Office fields into the group by box.
 - Format the font, color or background of each column.
 - Add comma's, dollar or percent signs.
 - Include summaries such as down totals, average, count, etc.
- New mail merge capabilities allow you to use Sage Timberline Office data in the body of the email messages to create form letters and other documents.



- Generate email content from existing Word documents. Use File > Open to open a Microsoft Word document. This feature will take the contents of the selected Word document and populate the MyAssistant email message, which then allows for additional editing of the content.
- Add company logos and other images.
- Format text in the email body similar to what you would do in Word.
- Check you spelling with the built-in spell checker.
- Use email directories and mail merge to send personalized letters and other documents.
- Merge the fields from Sage Timberline Office in the message body.
- Format Sage Timberline Office data in the message body.

You have more control on how information is presented. The following example shows how information can be grouped and highlighted, making it easy to scan the message for a specific section.

JC Cost Codes over budget

Job	Cost Code	CC Description	Total Estimate	JTD Cost	Variance
Description: Clackamas Office Park #4					
03-002	1-045	Insurance	1,413.00	1,415.00	-2.00
03-002	2-140	Dewatering	4,392.16	5,053.23	-661.07
03-002	3-130	Permanent Forms	260.95	372.44	-111.49
03-002	3-210	Reinforcing Steel	6,117.31	16,119.67	-10,002.36
03-002	3-220	Welded Wire Fabric	928.01	1,645.65	-717.64
Description: Fort Wayne Officer's Club					
03-003	2-140	Dewatering	530.70	631.54	-100.84
03-003	2-220	Excavate & Backfill	2,508.26	5,325.11	-2,816.85
03-003	2-520	Cement Paving	5,117.52	7,976.81	-2,859.29
03-003	2-580	Pavement Marking	113.73	232.17	-118.44

Email directories now work with Job Setup Miscellaneous fields.

Report Attachments

Report Options

A copy of this report will be generated for each email message. Select the name and type of attached report, and any parameters the report may require.

Attachment name:

Attachment type:

Protect PDF with password:

Confirm password:

Show characters

Please fill in the appropriate parameters to determine the report content sent to each recipient.

Enter Project Manager: (Text)

Source: Record: Column:

Embed report as the body of the email

- Name report attachments using a combination of text and Sage Timberline Office data fields.

- Send report attachments in a CSV format, in addition to PDF, MS Excel, or text file formats.
- Password-protect PDF report attachments.

New Installation and Configuration

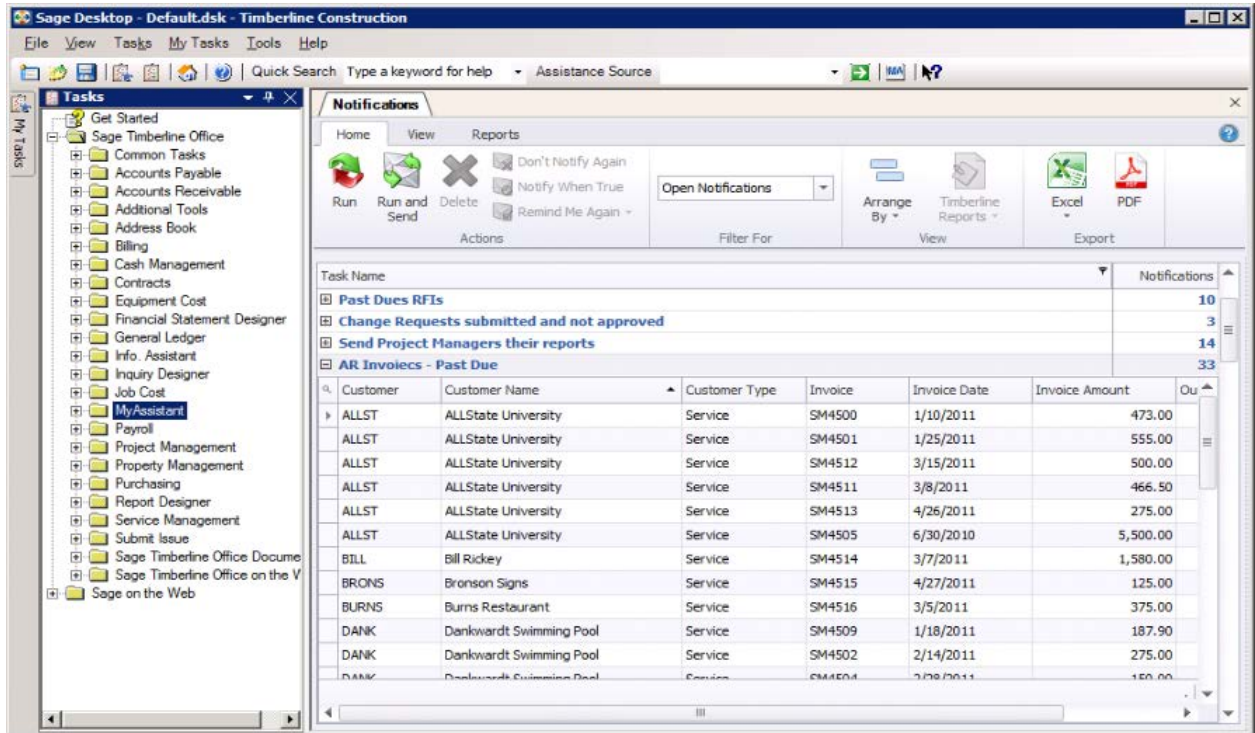
The MyAssistant installation has been rewritten from the ground up to make for a quick and smooth install. Some of the new installation items are:

- Prerequisites are installed with MyAssistant, resulting in a smoother installation process and smarter error handling.
- Upgrade to Microsoft SQL Server Express 2008 R2. This provides 10GB of space for the Notification database and improved performance. For more information, see: <http://www.microsoft.com/sqlserver/en/us/editions/2012-editions/express.aspx>
- MyAssistant will automatically create the needed SQL server user name and password, eliminating a step in the configuration process and the need to remember these security credentials.
- Support the automatic installation of the MyAssistant database on the full version of MS SQL Server 2008.
- A new MyAssistant Configuration Manager application is available on the server, making it simple to change MyAssistant settings, importing Sage Timberline Office custom fields, and changing passwords.
 - The Configuration Manager is always accessible on the MyAssistant server for updating passwords, importing Custom Fields, and updating Mail Server settings.
 - The first time through or when changing passwords, password fields have the ability to “Show Characters” to cut down on errors while typing.
 - You can move to necessary step without having to step through the entire wizard.

Performance

Performance of MyAssistant Tasks run on demand has been improved or enhanced, allowing results to be returned more quickly.

Sage Desktop



Access your notifications in the Sage Desktop using the new MyAssistant viewer. While working in the Sage Desktop you can:

- Organize your information into group using Sage Timberline Office values.
- Use the Filter or Find (keyword search) options to quickly find the information you need.
- See all notifications for a job, customer, vendor, tenant, etc. with a new Arrange By option.
- Work with Sage Timberline Office data to Excel with a new Open in Excel option.
- Send some a list of notification with the Export to PDF feature Password Protect reports distributed with MyAssistant.

Miscellaneous Enhancements

- View MyAssistant email messages on smart phones.
- You can now use the Gmail main server and view MyAssistant email messages in your Gmail Inbox.
- The names of the MyAssistant applications have changed to better represent the features available in each:
 - MyAssistant Task Manager is now named MyAssistant Designer.
 - MyAssistant Notification Manager is now named MyAssistant.

- MyAssistant email messages no longer contain the “Click Here”, “Mark Complete” and “More Information” buttons providing cleaner email messages.
- Easily update server passwords, import Sage Timberline Office custom fields or maintain other settings with a new MyAssistant Server Configuration Manager.
- Use MyAssistant on a computer regardless of whether Sage Timberline Office is installed.
- MyAssistant ships with a clean-up utility to remove old information from your database.

Frequently Asked Questions

Q. Who will receive this updated software?

Sage Timberline Office MyAssistant customers who are on a current maintenance plan. Please contact Sage Timberline Office Support to see if you're on a current support and maintenance plan.

Q. Will I lose any of the MyAssistant Tasks or Conditions?

No, the MyAssistant upgrade will upgrade your Tasks and Conditions without data loss.

Q. What version of Sage Timberline Office will be supported by MyAssistant 9.7?

MyAssistant 9.7 supports Sage Timberline Office 9.7.

Q. What version of Sage Timberline Office will be supported by MyAssistant 9.8?

MyAssistant 9.8 supports Sage Timberline Office 9.8.

Q. Is there training available for this new version of MyAssistant?

Yes, training will be available for these new versions. Log on to www.SageU for your training options.

Q. Have the hardware and software compatibility requirements changed for MyAssistant 9.7 and 9.8?

There have been no changes in the hardware and software requirements for these new versions. If you have questions/concerns about the current requirements please refer to the document titled MyAssistant Hardware and Software Compatibility. You can find this in the MyAssistant folder. Innovative Software Design > My Assistant > MyAssistant Hardware and Software compatibility

Technical Assistance

Please note: Customer Support for Sage Timberline Office MyAssistant is now handled through our Sage Customer Support team. Questions will be answered through **800-551-8307, menu option #7**. Calls may be handled on a call-back basis. If a MyAssistant support analyst is not available, we will need to take your information and have an analyst call you back. We make every attempt to return your call as soon as possible, up to no more than four hours for more urgent questions or one business day for other questions.

Depending on your Sage Service Plan, you may be able to take advantage of the following services:

Sage Customer Portal

You may log on to the Sage Customer Portal at <https://customers.sagenorthamerica.com> to access any of the following:

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 (see below).

Online Support Request: Submit an online support ticket when you have a non-urgent question. One of our call center support analysts will assist you. Online support hours are the same as our customer support call center hours (see below).

Sage Customer Support Call Center

Telephone Support: When you have a more urgent question or would prefer to speak to a customer support analyst directly, call us at 800-551-8307. For questions only about MyAssistant, select option 7 after entering your customer account number.

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 meeting

Upgrading Your Service Plan

If your service plan does not provide online or telephone customer support and you would like to add or upgrade a service plan, please call 800-858-7098.