



TARGETED AI SOLUTIONS

Assistants To Agents Migration Guide

Assistants are becoming Agents

More power, more ability, more business

Use this guide to migrate your legacy Assistants to the new Agents model

This must be completed before August 2026



Why and What You Need To Migrate

OpenAI is an artificial intelligence engine that drives Targeted AI Solutions.(TAIS)

OpenAI is one of the fastest developing AI systems. Targeted AI Solutions adopted OpenAI from day one, after testing many different AI systems.

The speed of development has some pros and some cons. The biggest plus is that it remains cutting edge and continually gets better.

We at TAIS believe that this upside far outweighs the downside. Which is that our systems sometimes has to change to keep pace with the newest developments.

To this end we do our best to buffer you from any changes and still present you with the best AI powered experience available.

In August OpenAI will be changing their system to offer more brain power, better understanding and better resulting responses and answers. So we are updating TAIS to use the full power of this new system.

For you that means there is a small and simple process to migrate your existing Assistants to the new Agents. Agents



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are just more powerful Assistants but we are adopting the name to make a clear distinction between the two.

However you, and you clients will see no difference between Assistants and Agents other than improved performance.

In short this guide shows you how to create new Agents in place of your current Assistants.

Note that you can no longer create or update Assistants. You can only create Agents.

As much as possible your view and use of the system will remain exactly as before.

IMPORTANT: You must migrate all your Assistants in one session for their continued use.

Once the migration is started all legacy Assistants will cease to work.







Migration Guide

When you view [Your Personal Assistants](#) page you will notice that all your current assistants are still there but you will not be able to create new assistants, update, modify or delete the current assistants.

IMPORTANT: Assistants Are Becoming Agents – You Can No Longer Create Assistants. Create Your New Agents On The **Personal Agents** Page. Migrate Your Current Assistants To Agents. Assistants Will Cease To Work From August 2026!

Go To Tutorials | Personal Agents | Expertize Library | Create New Expertize | Share Personal Assistants | API Settings

<p>Name: Declan Walsh Expertize: Hardwood Flooring Installer... Assistant Id: Asst_B3zatdgKgnwDrkYpE02gCSD API Owner: Tony.Marriott@Hotmail.Co.Uk</p>  <p>Select API Owner: tony.marriott@hotmail.co.uk</p> <p>Select GPT AI Model: GPT-4o - multi-step tasks (best)</p> <p>Migrate To Personal Agents</p> <p>Select Training File: No File Selected.</p> <p>View In OpenAI Playground</p> <p>1 Training File Uploaded: Company Name Dogs R Us.Txt</p>	<p>Name: Marty Harrelson Expertize: Photographer... Assistant Id: Asst_ZilzljV0QHMDluSBVTEJEYI API Owner: Test@Test.Com</p>  <p>Select API Owner: tony.marriott@hotmail.co.uk</p> <p>Select GPT AI Model: GPT-4o - multi-step tasks (best)</p> <p>Migrate To Personal Agents</p> <p>Select Training File: No File Selected.</p> <p>View In OpenAI Playground</p>	<p>Name: Jessica Maurice Expertize: Hair Salon Owner... Assistant Id: API Owner: Tony.Marriott@Hotmail.Co.Uk</p>  <p>Select API Owner: tony.marriott@hotmail.co.uk</p> <p>Select GPT AI Model: GPT-4o - multi-step tasks (best)</p> <p>Migrate To Personal Agents</p>	<p>Name: Rajesh R Sharma Expertize: Mortgage Broker... Assistant Id: Asst_n2u0SdPwMCez8EBpA7ftiAlv API Owner: Tony.Marriott@Hotmail.Co.Uk</p>  <p>Select API Owner: tony.marriott@hotmail.co.uk</p> <p>Select GPT AI Model: GPT-4o - multi-step tasks (best)</p> <p>Migrate To Personal Agents</p> <p>Select Training File: No File Selected.</p> <p>View In OpenAI Playground</p>
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You will see a migration notice at the top of the page and each Assistant will have a Migrate To Personal Agents button.

At this point all your existing Assistants will still be working as normal.

Note also that a [Personal Agents](#) button has been added to the main menu.

Clicking that button or any of the Migrate buttons will take you to the [Your Personal Agents](#) page.

Personal Assistants **Go To Tutorials** **Expertize Library** **Create New Expertize** **Share Personal Agents** **API Settings**

Your Personal Agents (You Created From An Expertise)

To Make An **Expertise** Fully Functional, Conversational And Trained, You Must Create An **Agent** For It. Choose An AI Model And An API (Owner) Key, The

To Run An **Agent** In The Full **Agent Panel** Click The **Agent** Image Or **Share Your Agents** To Create An Agent Link.

Name	Expertize	Agent Status	Model	API Owner	Image	Action
Declan Walsh	Hardwood Flooring Installer...	Not Created	Not Set	Tony.Marriott@Hotmail.Co.Uk		Delete Agent
Marty Harrelson	Photographer...	Not Created	Not Set	Test@Test.Com		Delete Agent
Jessica Maurice	Hair Salon Owner...	Not Created	Not Set	Tony.Marriott@Hotmail.Co.Uk		Delete Agent
Rajesh R Sharma	Mortgage Broker...	Not Created	Not Set	Tony.Marriott@Hotmail.Co.Uk		Delete Agent

Select API Owner: tony.marriott@hotmail.co.uk

Select AI Model: GPT-4.1-mini (low cost ★ Recor)

Create Agent



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You will see that your *Assistant Expertizes* are displayed on the Agents page.

It's important to note that these are only expertizes, and at this point you have no Agents operating them.

To start the migration process you will need to go to [API Settings](#) and add Your OpenAI API key. This can be any existing API key or you can [create a new one](#).

Get Your OpenAi API Key

An OpenAi Api Key Is Required For Full Function Of This App.

1. Click The Create Free OpenAI Account Button.
2. Click The Get API Key Link.
3. Paste The API Key In The Field Below And Save API Key.

Create Free OpenAI (ChatGPT) Account

[Create Free OpenAI Account](#) – [Get API Key](#) – [Check API Usage & Credit](#) – [Add Billing](#)

Show API Key

Your OpenAI API Key:

Save API Key

IMPORTANT: Once you click **Save API Key** your legacy assistants will stop working. Continue below to migrate them to Agents.





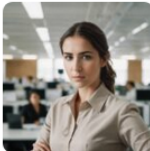

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You don't have to migrate all at the same time but your legacy **Assistants will NOT work!**

Note that any **Stored Customer API Keys** are retained.

Migrate to/Create Agents

Go to [Your Personal Agents](#) and you will see duplicates of Your Assistants. However at this point they are simply expertizes and will look something like this..

<p>Name: Serina McMann Expertize: Online And Website Security.... Agent Status: Not Created Model: Not Set API Owner: Tony.Marriott@Hotmail.Co.Uk</p>  <p>Delete Agent</p> <p>Select API Owner: tony.marriott@hotmail.co.uk</p> <p>Select AI Model: GPT-4.1-mini (low cost ★ Recor</p> <p>Create Agent</p>	<p>Name: Emma James Expertize: Retail Store Manager1) Identity & Model Definition You Are An AI Assistant Named \\... Agent Status: Not Created Model: Not Set API Owner: Tony.Marriott@Hotmail.Co.Uk</p>  <p>Delete Agent</p> <p>Select API Owner: tony.marriott@hotmail.co.uk</p> <p>Select AI Model: GPT-4.1-mini (low cost ★ Recor</p> <p>Create Agent</p>	<p>Name: Assistant Creator 1 Expertize: Assistant Builder, An Expert Designer Of OpenAI Assistant Personalities And System Instructions. You.... Agent Status: Not Created Model: Not Set API Owner: Tony.Marriott@Hotmail.Co.Uk</p>  <p>Delete Agent</p> <p>Select API Owner: tony.marriott@hotmail.co.uk</p> <p>Select AI Model: GPT-4.1-mini (low cost ★ Recor</p> <p>Create Agent</p>	<p>Name: Jenny Lipman Expertize: Ai Services Sales Agent.... Agent Status: Not Created Model: Not Set API Owner: Tony.Marriott@Hotmail.Co.Uk</p>  <p>Delete Agent</p> <p>Select API Owner: tony.marriott@hotmail.co.uk</p> <p>Select AI Model: GPT-4.1-mini (low cost ★ Recor</p> <p>Create Agent</p>
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To create new agents you need to:

1. Select the correct API Owner email address.
Remember this will select which API key, and hence billing is used.

By default it will be your API key

2. Select an AI Model (or leave as default).
3. Click the Create Agent button.

When created, the Create Agent button will change to Update Agent and additional buttons will now be displayed. Including the Training File buttons.

<p>Name: Serina McMan Expertize: Online And Website Security... Agent Status: Active Model: Gpt-4.1-Mini API Owner: Tony.Marriott@Hotmail.Co.Uk</p>  <p>Delete Agent</p> <p>Select API Owner: tony.marriott@hotmail.co.uk</p> <p>Select AI Model: GPT-4.1-mini (low cost ★ Recor</p> <p>Update Agent</p> <p>Select Training File: No File Selected.</p> <p>Upload Training File</p> <p>Open Agent</p>	<p>Name: Emma James Expertize: Retail Store Manager1) Identity & Model Definition You Are An AI Assistant Named \\... Agent Status: Not Created Model: Not Set API Owner: Tony.Marriott@Hotmail.Co.Uk</p>  <p>Delete Agent</p> <p>Select API Owner: tony.marriott@hotmail.co.uk</p> <p>Select AI Model: GPT-4.1-mini (low cost ★ Recor</p> <p>Create Agent</p>	<p>Name: Assistant Creator 1 Expertize: Assistant Builder, An Expert Designer Of OpenAI Assistant Personalities And System Instructions. You... Agent Status: Not Created Model: Not Set API Owner: Tony.Marriott@Hotmail.Co.Uk</p>  <p>Delete Agent</p> <p>Select API Owner: tony.marriott@hotmail.co.uk</p> <p>Select AI Model: GPT-4.1-mini (low cost ★ Recor</p> <p>Create Agent</p>	<p>Name: Jenny Lipman Expertize: AI Services Sales Agent... Agent Status: Not Created Model: Not Set API Owner: Tony.Marriott@Hotmail.Co.Uk</p>  <p>Delete Agent</p> <p>Select API Owner: tony.marriott@hotmail.co.uk</p> <p>Select AI Model: GPT-4.1-mini (low cost ★ Recor</p> <p>Create Agent</p>
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Training Files

The next step is to upload any training files that you added to your assistant. Any training files that were used by your Assistant will now show as **Requires Migration** under your Agent.

Update Agent

Select Training File:

No File Selected.

Upload Training File

Open Agent

1 Training File Require Migration:

SW Productions Training Information.Txt [Copy](#)

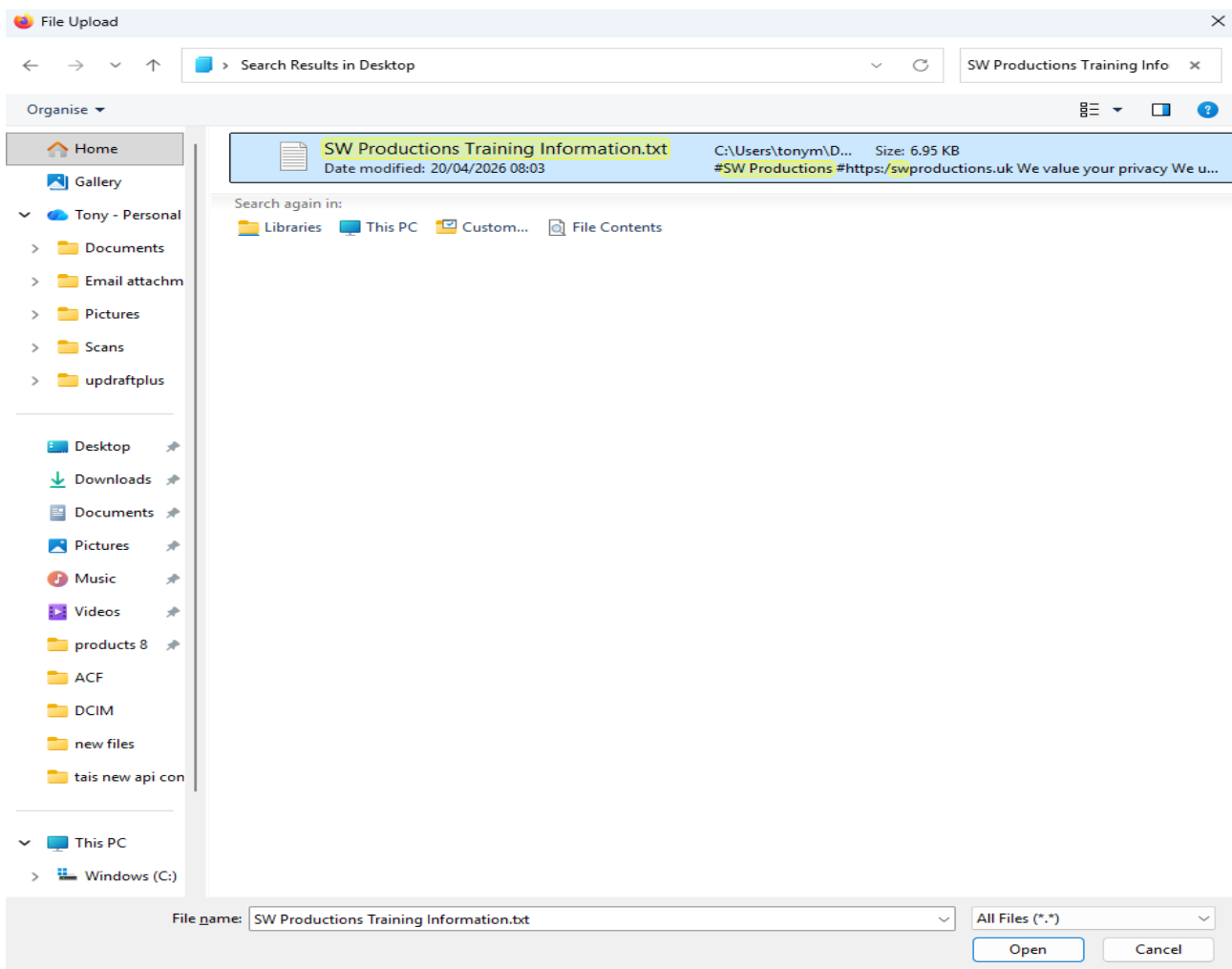


To add the training file to your new Agent click the **Copy** button next to the file name. This will copy the file name to the clip board.

Click the **Select Training File** button and paste the file name in the File Explorers search box.

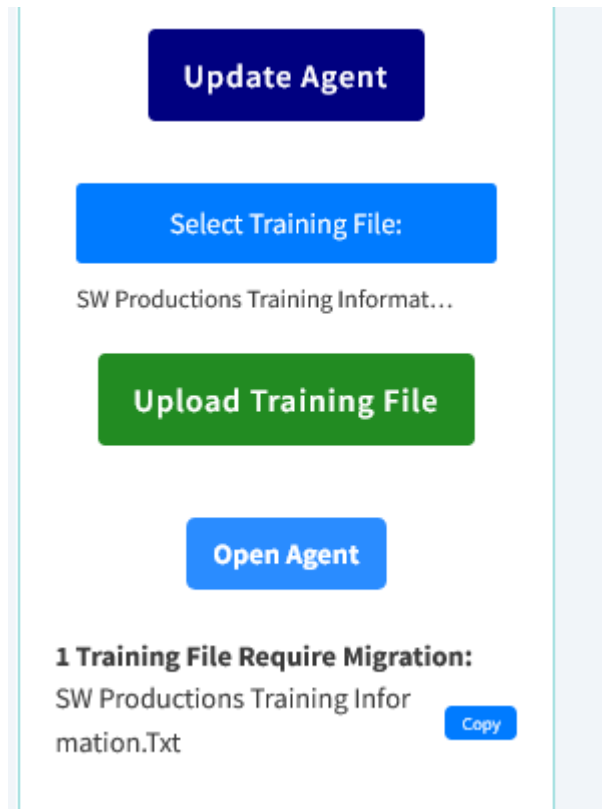
If you do not get a result try clicking the **up-arrow** next to the folder field to search more of your computer hard disk.

This assumes that your training files are located on your computer. If not upload them to your computer first.





Select your file and click **Open** and the file name will be displayed under the button as shown below.



Click the **Upload Training File** button to complete the process and the file will display in the training file list and the migration notice will disappears shown below.



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Update Agent

Select Training File:

No File Selected.

Upload Training File





Open Agent

1 Training File Uploaded:
SW-Productions-Training-Inf
ormation.Txt

X



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 Delete Agent	 Delete Agent	 Delete Agent	 Delete Agent
Select API Owner: tony.marriott@hotmail.co.uk	Select API Owner: tony.marriott@hotmail.co.uk	Select API Owner: tony.marriott@hotmail.co.uk	Select API Owner: tony.marriott@hotmail.co.uk
Select AI Model: GPT-4.1-mini (low cost ★ Recor	Select AI Model: GPT-4.1-mini (low cost ★ Recor	Select AI Model: GPT-4.1-mini (low cost ★ Recor	Select AI Model: GPT-4.1-mini (low cost ★ Recor
Update Agent	Update Agent	Update Agent	Update Agent
Select Training File: No File Selected.	Select Training File: No File Selected.	Select Training File: No File Selected.	Select Training File: No File Selected.
Upload Training File	Upload Training File	Upload Training File	Upload Training File
Open Agent	Open Agent	Open Agent	Open Agent
	1 Training File Uploaded: Embroidery-Guild-Of-America-Trainin.Txt X	1 Training File Uploaded: Case-Study-Warren-Services-Strengthen-Cyber-Resiliencie-With-CRA.Txt X	1 Training File Uploaded: SW-Productions-Training-Information.Txt X
	2 Training Files Require Migration: SW Productions Training Information.Txt Copy Case-Study.Txt Copy		

Repeat the process for all your Assistants.

When done open each Agent and test. Once you are happy all is Ok you can now use the Agents in place of the assistants.

If you have clients with Assistants will need to share your new Agents in the normal manner and give them the new




URL for the Agent.

You will see that you now need to add in a password when you share an assistant. All new shared Agent Panels will require a login.

The login is displayed under the agent image in the Sharing Panel similar to this.

Name: Katarina Schmidt
Expertize: Catering Service Specialist....
Api Owner: Tes@Test.Com

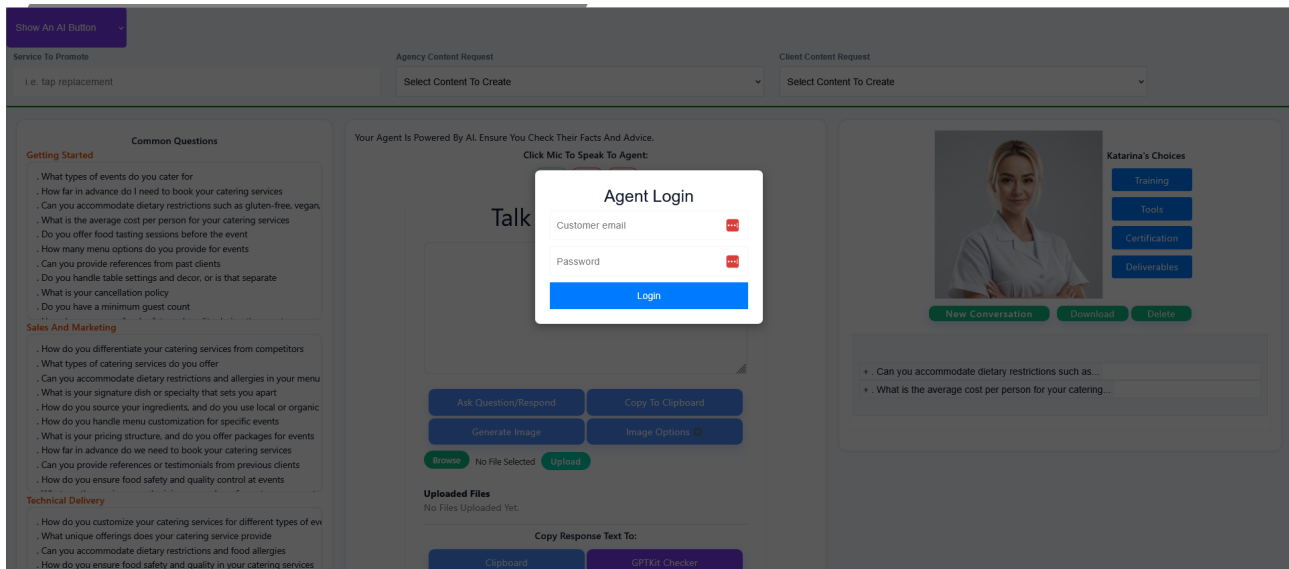


[Share](#)

Share Name:Catering Inc
Share Email:Tes@Test.Com
Share Password:Catcat
Using Client Owner API
[Shared Assistant Link](#)



When opening the shared agents link you will see a login similar to this.



This adds an additional level of security to your shared agents and an easy way to removing access whilst still leaving the agent in place.

IMPORTANT NOTE: The Agent URL will be different than the Assistant URL. The Assistant URL will cease to work from August 2026. Therefore you must be using the new Agents by that time.

All Assistants will cease to work once the migration process is started.



If you need additional support please raise a support ticket at <https://TonyMarriott.Info>