Compatibility

Adagio

BankRec 8.1E - 9.2A
FX 9.1B – 9.3A
GridView 9.3A
Inventory 8.1E - 9.2A
Invoices 9.1A – 9.3A
JobCost 8.1D – 9.2A
Lanpak 9.3A
Ledger 9.1A – 9.3A
OrderEntry 8.1E – 9.3A
Payables 8.1E – 9.3A
PurchaseOrders 8.1C – 9.3A
Receivables 9.0B – 9.3A
SalesAnalysis 9.1A – 9.2A
SalesCQ 8.1C - 9.2B
Time&Billing 8.1D – 9.2A

Other

MS Office 2010/13/16, 365
MS Windows 7 (SP1), 8, 8.1, 10

Note

The most up-to-date compatibility information is on the Product Compatibility Info link at www.softrak.com.

Enhancements in DocStore

- When DocStore is installed as an upgrade at a site using Adagio ePrint, the DocStore option now automatically enabled.

- The Process SoftPDF function attached a Purchase Order document to Adagio Payables manual check batch documents when it should not have in some cases.

- The Process SoftPDF function now displays a 'Completed' message.

- The Archive Year menu was missing in the initial release of DocStore.

- Attached PDF documents in the DocStore viewer or when viewed in Receivables/Payables are now sorted by Customer/Vendor, Date, Doc Type, and Doc Number.

- The Extract and Watermark functions in the SoftPDF Viewer put an image with "nostice" on the resulting PDFs.

- When there are a lot of PDF documents in DocStore, it can take a while to load the catalog for the DocStore Viewer. If you clicked Close before the catalog was completely loaded, it didn't halt loading immediately. And if you clicked Close a second time, there was an Access Violation error. This now prevented.

- An 'Application Integrity Check' phase was added to DataCare. Existing DataCare jobs need to be edited to enable the 'Application Integrity Check' for the 'Adagio Common Files / DocStore' application.

- The Data Integrity Check for DocStore (including DataCare) creates the log file SDAFELOG.dat (where .dat is your company data file extension) containing details of the integrity check of transaction and other files with links to documents in DocStore for Adagio modules that support DocStore. Details of document link errors are written to this log, including the master file account number (Customer, Vendor, etc.) and the Document Number. The log is a text file and can be opened with Notepad or any text editor.

- There was an error in Adagio programs that created a PDF document when the Vendor or Customer Number contains asterisks. Any asterisks are now replaced by an underscore character when folders are created.

- The Maintain Documents function now prevents you from using Windows reserved characters when renaming a document, which broke the link to the document.

Enhancements and revisions in earlier versions

Refer to the Readme help file for details of enhancements and revisions in earlier versions or Change Log under Documentation for this module on Softrak's web site.

Installing

To install Adagio DocStore you need the serial number and install code from the download instruction email sent to you by Softrak Systems.

If you are installing an upgrade from Adagio ePrint, you need the upgrade serial number and install code from the download instruction email. A version of Adagio ePrint should already be installed on your computer before installing the upgrade. If a previous version is not already installed, you can still install the upgrade. After entering the upgrade serial number and install code, you will also have to enter the serial number and install code from a previous version.

Read the section 'Upgrading" sections below before installing an upgrade.

To install Adagio DocStore or an upgrade, run the program file you downloaded. Once the install program is running, you can click the View button for detailed installation instructions in the Readme help.

Adagio DocStore 9.3A **requires Adagio Lanpak (if used) to be version 9.3A** or higher.

Adagio DocStore 9.3A requires other Adagio modules (if used) to be at version 9.3A for DocStore functions to be active. Earlier versions of these modules will have the same functionality as they did for Adagio ePrint, but they will not have DocStore functionality.

Note: To use the DocStore functions in your company's database(s) and in the sample data, you must ensure that the Enable DocStorage option in DocStore's Profile is enabled. Within each of your Adagio modules, you will need to enable the 'Allow PDF print' option in their Company Profile. As well, you will need to enable the 'Allow PDF print' option in User Preferences in each module for each user who will print reports, financial statements and/or documents to PDF.

GridView 9.3A views that include a "Doc Link" data element from a table in an Adagio 9.3A module will automatically support display of documents associated with the record stored with Adagio DocStore. Prior versions of GridView can link to documents in the SOFTPDF folder using a formula, including form documents (invoices, checks, receipts, etc.), as they are still written to SOFTPDF by 9.3A modules as well as to the DocStorage folder.

Installing DocStore will update the online help and Sample Data for the following 9.3A modules for use with DocStore. Therefore, if the release date of these modules is earlier than DocStore 9.3A (2017.12.15), these modules should be installed **before** DocStore is installed:

Ledger
OrderEntry
Payables
PurchaseOrders

After installing DocStore, use the Refresh Sample Data function in the above modules to update their sample data and multi-currency sample data.

The Data Integrity Check (DIC) in DocStore on the sample data installed with the following modules will report a File Integrity error due a change in DocStore made after these versions were released. DataCare will also report this error when checking the sample data for these modules. The errors can be rebuilt by the DIC or DataCare.

Invoices 9.2A (2017.08.30)
JobCost 9.2A (2017.10.20)
SalesCQ 9.2B (2017.12.13)
Time&Billing 9.2A (2017.10.24)
OrderEntry 9.3A (2017.12.04)

DataCare checks and backs up DocStore database files using the "Adagio Common Files/DocStore" Application in a job. The DocStore database files (SDDOCS*) are backed up. However, to back up the EP* data files used by DocStore, you must explicitly add them in the 'Include files from these folders' list on the Backup tab in the DataCare Company Profile. A future release of DataCare will do this automatically.

An 'Application Integrity Check' phase was added to DataCare. Existing DataCare jobs need to be edited to enable the 'Application Integrity Check' for the 'Adagio Common Files / DocStore' application.

Local scanners and drag-and-drop are not yet supported on Adagio Cloud, although documents can be attached from local folders.

Upgrading

Upgrading from Adagio ePrint   **Upgrade Complexity:**   **Easy ●**

Adagio DocStore 9.3A does not require a database conversion from versions of ePrint and the upgrade can be installed at any time.

The 'Process SoftPDF to DocStore' function under the Maintenance menu should be run after upgrading to DocStore. It copies and catalogs documents created by pre-9.3A versions from SoftPDF to DocStorage to allow them to be viewed with the DocStore viewer and from transactions in 9.3A modules. This function also needs to be run when modules are upgraded to 9.3A and from time to time until all modules are at 9.3A or higher.

Adagio DocStore 9.3A and higher replaces Adagio ePrint. Adagio ePrint installed to the \Softrak\ePrint folder. Adagio DocStore installs to the \Softrak\DocStore folder.

When DocStore is installed, it automatically uninstalls ePrint. However, the uninstall intentionally leaves the \Softrak\ePrint folder in place because Adagio application versions lower than 9.3A check that ePrint is installed and registered to enable their ePrint to PDF functionality. **Do not delete the \Softrak\ePrint folder or the files it contains.**

If you have created any shortcuts for ePrint, you should change them to point to the new DocStore folder.

NOTE: The DocStore database (SDDOCS* files) MUST be kept in synch with transactions and master records in 9.3A module databases. Therefore, the Backup function in Adagio 9.3A modules always automatically backs up the DocStore database files along with other files being backed up.

The PDF documents in the DocStore folder must also be kept in synch. The PDF files are NOT included automatically. You must backup these files by other means.

When copying or restoring a 9.3A dataset, you MUST also take the DocStore database files (SD*). Failing to do this will cause problems in links to documents in 9.3A modules.

When restoring databases for individual 9.3A modules, the DocStore database files (SDDOCS*) would NOT normally also be restored. Otherwise, links added by other modules since the backup was made would be lost. When restoring an entire dataset (databases for all Adagio modules), you MUST also restore the DocStore database files (SDDOCS*). Failing to do this will cause problems in links to documents in 9.3A modules.

NOTE: The Active Users and List Application Versions functions in Adagio Console will show "ePrint" as the Application Name rather than "DocStore" until an update to Adagio Console is released that will correct this.