Compatibility

Adagio

BankRec 8.1E - 9.2A
FX 9.1B – 9.3A
GridView 9.3A, 9.3B
Inventory 8.1E - 9.2A
Invoices 9.1A – 9.3A
JobCost 8.1D – 9.2A
Lanpak 9.3A
Ledger 9.1A – 9.3A
OrderEntry 8.1F – 9.3A
Payables 8.1F – 9.3A
PurchaseOrders 8.1D – 9.3A
Receivables 9.1A – 9.3A
SalesAnalysis 9.1A – 9.3A
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

- Added a 'Print' button to the Maintain Documents screen used in Adagio modules that integrate with DocStore. All the documents selected will be sent to the selected printer.

- Added new 'Invert' button to the Maintain Documents screen invoked from the paperclip button when attaching or maintaining documents for Adagio DocStore users. The Invert button sets the order of the documents displayed in the grid to the reverse of what is currently seen (eg. by default, the most recently attached document will display first in the grid). The Invert button also changes the PDF sequence numbers. Installing Receivables enables this functionality in other Adagio modules.

- Added a 'Newest Last' option to the Maintain Documents screen invoked from the paperclip button when attaching or maintaining documents for Adagio DocStore. By default, documents are displayed in the grid in the order they were attached, with the most recently attached document shown first in the grid. Enable the Newest Last option, to quickly have the documents in the grid display the oldest document attached first in the grid (i.e. the opposite of the default display).

- It is now possible to attach files of types other than PDFs to attach to records, including Word and Excel documents, Outlook email messages, JPG, BMP and TIF images and PCX fax files. These files will be converted to PDFs when attached, rather than maintaining the original file type. Note: Drag and Drop is not supported on Adagio Cloud, and only image files can be attached (JPG, BMP and TIF).

- Process SoftPDF supports converting PurchaseOrders requisition documents (which are not generated by DocStore or ePrint) to DocStore for PDF documents that were created by another means, such as PrintBoss™, using a file naming convention consistent with other P/O document types.

- The Process SoftPDF to DocStore function adds documents to DocStore for Adagio Payables Check Reconciliation.

- Using the Adagio toolbar button for DocStore from another application no longer launches a second instance of the program if it is already open.

- In the View DocStore function, the Document Type field was not shown correctly for some documents for Adagio Inventory 9.3A.

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 or higher 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.

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.