

Release Notes

The most up-to-date compatibility information is on the [Product Compatibility Info](#) link at www.softtrak.com.



Adagio

DataCare 8.1A (See Note 1)
GridView 6.8A – 9.0B
Invoices 9.0A (Note 1)
JobCost 6.8B, 8.1B (Note 1)
Lanpak 9.0C
Ledger 6.8A – 9.0C (Note 1)
MultiCurrency 8.0B – 8.1A
ODBC 9.0A
OLEDB 6.8A – 8.0A

OrderEntry 8.1C (Note 1)
Payables 6.8A – 8.1B
Purchase Orders for Adagio 8.1A (Note 1)
Receivables 6.8A – 9.0A (Note 1)
SalesAnalysis 6.8B – 8.1B (Note 1)
SalesCQ 8.1A – 8.1B (Note 1)
Crystal Reports® for Adagio 8.5 - 8.5B

Other

MS Office 2003, 2007
MS Windows XP, Vista, 7

Enhancements and revisions in Adagio Inventory 8.1C (2010.07.16)

- ◆ Fully compatible with Windows 7.
- ◆ Compatible with Adagio Invoices 9.0A. **Inventory 8.1C requires Invoices be at version 9.0A (if used)**. It is not compatible with earlier versions of Invoices.
- ◆ Supports the scaling text feature on Windows 7 (previously referred to as 'Large Fonts'). To increase the font size, from the Windows 7 Control Panel select Appearance and Personalization, Display, and 'Set custom text size (DPI)'. Enter a scale percentage and turn off 'Use Windows XP style DPI scaling'. You must off your computer and log back in for the change to be applied. Note: The option 'Use Windows XP style DPI scaling' must be off, and changing the scaling will cause your Windows desktop to be rearranged.
- ◆ Extensive improvements have been made to the grids and finders used to select items to view or edit. Item grids can be sorted by Item Number or Item Description using the right mouse context menu. The Column Editor allows you to hide inactive items when the grid is displayed in item number sequence. The Find button allows you to locate an item by entering the Item Description (without case sensitivity). A 'Find Item' button has been added to the detail screen in all transaction entry functions. If an inactive item is located and these records are suppressed from the grid, the user is warned the item is inactive and is able to activate the item (if the user has permission to edit items, otherwise the entry must be canceled).
- ◆ Adagio OrderEntry 8.1C (2010.05.07) or higher and Adagio Invoices 9.0A or higher support find by description and inactive item functionality when Inventory 8.1C data is present.
- ◆ Item Number segments can be shown as separate fields in grids and finders. The field names are set to the Segment Name fields from the System Options tab in the Company Profile. These fields are also available in GridView after installing Inventory 8.1C.
- ◆ Column Editor settings are now saved by grid by user by database.
- ◆ Option to print Active items only has been added to report dialogs these reports: Item Status, Overstocked Items, Slow Moving Items, Price List, Selling Price/Margin Analysis, Markup Analysis, Sales History, Alternate Price Lists, and Alternate Items,
- ◆ Added new function User Preferences under the File menu. It allows you to set certain options by user that were previously global, including options previously found under File | Options, Reports | Report Options and from the Company Profile (company background color and On Start-up functions). The preferences can optionally be set for all users and preferences can be printed. If no individual user preferences have been set up for a user, all preferences originally set for the Adagio System Administrator, user SYS, will be used.
- ◆ The option 'Auto-advance smart finder' has been added (in the User Preferences function). It controls whether the focus is on the previously found grid or on the search criteria field when the smart finder is opened. Select the option if you want focus to be on the next row in the grid, allowing you to press F6, Enter and select each item in turn through the found list. Turn it off if you usually want to search by new criteria each time the smart finder is invoked. In either case the position is advanced in the grid each time the finder is opened. When the smart finder Grid is opened, you can toggle the focus between the Grid and the selection criteria by pressing F6.
- ◆ The option 'Implied decimal' has been added (in the User Preferences function). Turn the option on if you want a decimal automatically entered before the last two digits. For example, typing 400 in an amount field and tabbing to the next field will result in

the number being changed to 4.00; typing 400.00 and tabbing to the next field will leave the number as 400.00. With the option off, typing in 400 will result in the number being changed to 400.00 (the behavior in previous versions). Percent fields and exchange rate fields are not affected by this setting. The setting is by Adagio user, for all companies, and when set in any Adagio module, it is set for all Adagio module versions that support it.

- ◆ The option 'Alphabetically sorted field list' has been added (in the User Preferences function). Turn this option on if you want field lists in the Column Editor and Filters sorted alphabetically.
- ◆ Optional Fields have been significantly improved with the addition of edit controls to validate optional field entry within and across an Adagio module(s). Users can control whether a text field, combo box or Finder field is used to validate optional field entries. Data can be restricted as to length and case. Fields shared between modules (such as Adagio Receivables Customer optional fields in Adagio OrderEntry) will automatically inherit the same validation rules. Module by module control of field entry and validation is available.
- ◆ You now have explicit control of how an item record is displayed in any item selection grid. File | Edit Styles allows the creation of named styles with a colored background and font color. User control of font attributes bold and italic are also supported. Named styles may be assigned to individual items by editing a record or importing the style you wish to use. The style controls the display of an Item on the grid. Use this feature to highlight low stock levels or newly received items in inventory. Adagio Styles are shared globally between all Adagio modules and company datasets.
- ◆ Display just the records you need in your main Item selection grid. User defined filters can select and instantly display item records that meet specific criteria in a user specified sequence, ascending or descending. Column settings are saved by grid for each filter by user by database. Up to 5 selection rules can be defined per filter. Compare data elements to a constant value (YTD Sales > \$10,000), another data element (Standard Cost < Most recent cost) or, in the case of dates, to a "floating date range" (Last receipt date in Last 30 days). A 'Week starts on' field has been added to System Options tab in the Company Profile. Grid filters may be public or private. Item filters can be refreshed automatically when a Data Integrity Check is performed or on demand. Styles can be automatically applied to records that belong to a specific group, making it easy to identify important records according to criteria that you choose. The Display Style may also be set manually in the Edit Item function. The manual and automatic style code for the item print on the Item Status report in the Profile section. The Apply Styles function in the Maintenance menu allows you to apply multiple filter styles simultaneously.
- ◆ Data Integrity Check (DIC) will automatically refresh all filters and reset all filter Styles used based on the Style priority set in the item filter. For items that no longer meet any filter criteria, any filter style previously assigned to them is removed and reset to the Standard style. No messages or warnings are given in the DIC.
- ◆ You can now specify a desktop background color, image and/or text constant to display on the Adagio desktop. Use this feature to display your company logo. Use the text strings to make the company name prominent on the desktop. Any JPG or other graphic image can be centered or stretched to fit on the main program desktop. These settings are made on the Appearance tab in the User Preferences function.
- ◆ You can now maintain reorder data by Location for items, including Minimum and Maximum, Reorder Quantity and Projected Sales. You can edit the reorder data in the Edit Item function on the Reorder tab or in the separate Edit Reorder Data function by entering a Location. A future release of Purchase Orders for Adagio will let you auto-generate purchase orders by location.
- ◆ The Reorder and Overstocked Items reports can now be sorted and printed by a range of locations. Each of the reports now has 2 ranges, allowing it to be printed by Item/Location, Location/Item or in other combinations. If you choose other fields such as Category/Report Group, the report will print sorted by Category/Report Group/Item/Location. Note: The 'Reorder data' option on the Item Status report prints the total of all locations for the item.
- ◆ The Import and Export Reorder Data functions now include the Location field. The default template has changed to include the Location field as it must be included in the import file or defaulted.
- ◆ Dimension fields (W x L x H) for the item and for its packaged dimensions have been added to items. The units of measure are set in the 'Dimensions unit of measure' field on the System Options tab in the Company Profile. The dimensions print on the Item Status report in the Profile section. Future releases of Adagio OrderEntry and Adagio Invoices will support these fields, including the ability to print them on orders and other documents.
- ◆ Added an Excel Direct button to the Edit Item and Item Inquiries grids.
- ◆ Excel Direct from grids now has a progress bar and cancel for grids with a very large number of rows.
- ◆ Excel Direct (from finders, smart finders and from grids in some modules) can be configured to export an ASCII CSV file (instead of sending data direct to Excel) and start an application that automatically opens the file. This allows export when Excel is not installed and provides support for other spreadsheets such as OpenOffice.org. Note that unlike Excel Direct there is no formatting with CSV. To enable this functionality, entries must be made manually in the file \softrak\system\ssi2xl.ini. Refer to the Configuring Excel Direct to Export to CSV section for details.
- ◆ The Help | About dialog now has a 'System Info' tab showing the version and path to various DLLs used by the program.

- ◆ Import/Export supports Excel® 2007 format (.xlsx) allowing for greater than 65,535 rows in import and export files. Spreadsheets no longer need to be saved in Excel 97-2003 format (.xls) before they can be imported.
- ◆ 15 Tax Levy fields have been added to items on the Pricing tab. In OrderEntry 8.1C a feature was added to automatically add a flat or percentage surcharge for items and print it as a detail line on invoices. For example, for recycling fees on electronics. To accomplish this the Tax Base for the Jurisdiction in the Tax Group was set to charge tax on 1 of the 2 user specified cost fields in the item. There was a limit of 2 different fees per item, limiting the feature to supporting 2 jurisdictions if the fees were different. The addition of 15 Tax Levies in the item allows for up to 17 different jurisdictions. OrderEntry 8.1C (2010.05.07) or higher is required. The Tax Levies have been added to the Item Status report.
- ◆ Listing button added on the Group Setup window prints all options or enabled options only for a range of groups.
- ◆ The 'Overwrite records?' and 'Add new records?' options in the Import Physical Inventory Worksheet function have been removed, as the existing worksheet is always replaced on an import (unless there is an error during import). In addition, the message warning that the worksheet for the Location will be replaced has been updated to indicate that it will only be replaced if the import completes with no errors.
- ◆ The subtotals on the Item Valuation report printed sorted by Category Code, Item Segment, or Report Group with the 'Restrict to nonzero qtys and costs' option selected, totaled only the positive quantities and did not subtract the negative quantities.
- ◆ The Item Valuation report printed with a 'Valuation as of' date backdated from today, with the 'Restrict to nonzero qtys and costs' or 'Restrict to positive qtys and costs' option selected, excluded zero quantity as of the run date (today) instead of the valuation date.
- ◆ The Item Valuation report printed with a 'Valuation as of' date backdated from today, with the 'Restrict to nonzero qtys and costs' or 'Restrict to positive qtys and costs' option selected, and printed as Items by Location in detail format showed extra lines without item numbers or descriptions in some cases.
- ◆ The Item Valuation report printed as Separate Locations, with the 'Restrict to nonzero qtys and costs', had an incorrect Location subtotal. The Item Valuation report printed as Items by Location, with the 'Restrict to nonzero qtys and costs', had an incorrect Item subtotal. The Report Total was also incorrect for these reports.
- ◆ The Item Valuation report did not show the cost of items if the items currently have 0.00 cost and quantities at locations are not also 0. Consolidated Locations was affected for backdated reports. Items by Location and Separate Locations reported the correct quantity but not the cost. If the current cost of an item is 0 but the quantities at locations are not also at 0, the cost of an item will be calculated using the Most Recent Cost.
- ◆ The default column titles for the Archived Documents grid on the Purchase Orders tab in the Item Inquiry function did not match the actual fields in the columns.
- ◆ The Data Integrity Check can now rebuild "Item location file is out of sequence" errors.
- ◆ Typing the Adagio user password on the Open dialog displayed the characters very slowly when on a network in rare cases.
- ◆ The Enter Adjustments function did not allow multiple users in version IC8.1B, even when the 'Single user adjustment entry?' was turned off on the System Options tab in the Company Profile.
- ◆ The Reorder Report now has the item number and description on a separate line, which allows more of the description field to be shown.
- ◆ The Data Integrity Check (DIC) changed non-stock items that had Quantity on PO greater than zero to be a stocked item. The item could not be easily changed back to a non-stock item because not all quantities stored with the item were zero. The DIC no longer checks the Quantity on PO for non-stock items.
- ◆ If the 'Auto print audit list after post?' option was on, an error occurred in the Assemble Master Items function if you did a second assembly without first closing the function.
- ◆ The Item Assembly function now checks the active status of component items and displays a message indicating assembly is prevented if any on the items are marked inactive.
- ◆ When an inactive customer is selected from the finder or entered in the Customer field of the Enter Shipments function a warning is displayed.
- ◆ The Bills of Material inquiry screen did not update the fields when the Next and Previous buttons were clicked.
- ◆ The 'Inventory Control (I.C.)' total was wrong for Stock Transfer on the Transaction History report in multi-currency databases.
- ◆ If you cleared a Shipment by deleting details and blanking out the customer number you still could not import shipments and received the message "There is a shipment in progress. The shipment must be processed or cleared before importing can occur."
- ◆ In Item Edit, on the Vendors page, the width of the Additional Information fields has been increased to show more of the 75

characters allowed.

- ◆ The Composite Dictionary @Z80C has been updated to include changes made for 8.1C for use in Adagio GridView. The dictionary name changes to V3 (Adagio {Composite Tables 8.0C V3}). Views made using "IC Item w Add, Item Loc, Category (@Z80C201)", "IC Item w Additional (@Z80C207)" and "IC Item w Additional, Category (@Z80C200)" may need to be updated.

Enhancements and revisions in earlier versions of Adagio Inventory

- ◆ Refer to the Readme help file for details of enhancements and revisions in earlier versions.

Installing

To install Adagio Inventory you need the serial number and install code from the Product Label that came with the Product CD or from the download email sent to you by Softrak Systems.

If you are installing an upgrade, you need the serial number and install code from the Upgrade Product Label that came with your upgrade CD or from the download email. A previous version of Adagio Inventory 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 to this Version' below before installing an upgrade.

If you are installing a Service Pack, you do not need to enter a serial number or install code. However, a previous version of Adagio Inventory 8.1C must be installed before the Service Pack can be installed.

To install Adagio Inventory (or an upgrade) insert the CD in the drive. If the install program does not start automatically, run ADAGIO.EXE from the root of the CD. Or, if Adagio Inventory was downloaded, run the program file you downloaded. Once the install program is running, you can click the View button to open the Readme file for detailed instructions. If Adagio Inventory is installed on a network you must also do a workstation install for each workstation running Adagio Inventory. Refer to "Installing on a network" in the Readme for instructions.

To install the Adagio Inventory Service Pack, run the Service Pack program and follow the instructions on the screen. After installing the Service Pack, a workstation install may be required at each station running Adagio Inventory. To determine if a workstation install is required, start Adagio Inventory at the workstation. The workstation install will be automatically started if required. Note: If you are updating multiple applications at the same time, it may be faster to run the all workstation install to update all applications at once on the station. Refer to "Installing on a Network" in the Readme for instructions.

Upgrading to this Version

Note 1 The following modules (if used) must be at the version indicated, or higher, to be compatible with Adagio Inventory 8.1C.

DataCare	8.1A
Invoices	9.0A
Lanpak	9.0C
OrderEntry	8.1C (2010.05.07)
Purchase Orders	[8.1A SP2]
SalesAnalysis	8.1B (2010.05.05)
SalesCQ	[8.1B SP1]

Version numbers in square brackets were not yet released at time of this Inventory 8.1C release.

In addition, if Adagio Receivables is 9.0A then the following modules (if used) must be at the version indicated, or higher, to be compatible with Adagio Inventory 8.1C.

JobCost	8.1B
Ledger	9.0A or higher

Do not install this upgrade until you are certain the versions required above have been released and you have them available to install. The upgrades to the other modules may be installed before or after installing the Inventory upgrade.

Adagio Inventory 8.1C requires Adagio Lanpak to be version 9.0C or higher. **Do not install this upgrade before you have installed Lanpak 9.0C if you require multiple users in Adagio Inventory.** If you have any prior version Lanpaks installed but no 9.0C Lanpaks the Adagio Inventory install will warn you.

You can convert your IC database at any time. The program allows you to make a back up before proceeding with the conversion. You should perform a Data Integrity Check in your current version of IC before installing the new version and converting your database. Any

errors should be rebuilt or dealt with in your current version to ensure a successful conversion.

The conversion to 8.1C could take a significant period of time on databases with a large number of items across a network. For large databases, we recommend copying your database to a local machine, converting the data, and then copying it back. We strongly recommend you contact your dealer or consultant for assistance with this procedure and take a backup before proceeding.

Adagio Inventory 8.1C maintains reorder data by Location. The conversion asks you to select the Location you want to use as your default reorder data location. Any items for which you had entered reorder data prior to conversion will have that item's reorder data stored in the default location specified. The quantity figures for all other locations will be zero.

If you have multiple locations and you want to use this feature, and you had previously maintained the total quantity figures for all locations, you will need to adjust the reorder quantities using the Edit Reorder Data function or by exporting from the default location and importing to other locations as required. You will also need to import the adjusted quantities to the default location. Note: totals of the reorder quantities across all locations are maintain in the item master.

A future release of Purchase Orders for Adagio will support reordering by Location.

Adagio Inventory 8.1C is not compatible with earlier versions of Adagio Inventory. Adding and deleting items, or modifying the item description in earlier versions will cause data integrity errors. Do not attempt to open an 8.1C database with earlier versions. Earlier versions may open an 8.1C database without any warning but use of those versions can result in errors. Note: should this occur the Data Integrity Checker will rebuild these errors without any loss of data in most cases.

Other than the versions mentioned above in Note 1, Adagio Inventory 8.1C is not compatible with earlier versions of Adagio Invoices, OrderEntry, or Purchase Orders. Adding and deleting items, or modifying the item description in earlier versions will cause data integrity errors. Earlier versions may open without any warning but use of those versions can result in errors. Note: should this occur the Data Integrity Checker will rebuild these errors without any loss of data in most cases. If Inventory 8.1C must be used with these earlier versions you should use security Groups to disable the item edit function in these products to avoid integrity errors.

Column Editor settings are saved by grid by user by database in 8.1C, whereas in previous versions they were saved by grid by user. Therefore Column Editor setting changes must be made individually for each database.

The item import and export 'Items Default' template changed for 8.1C.

The Company Profile option 'Auto edit physical inventory' has been moved to the new User Preferences function. The On Start-up settings have also been moved to User Preferences.

If you have custom reports (CustomRP folder) or modified reports (ModRP folder) for Adagio Inventory that reference tables in Adagio Receivables and you are also upgrading to Receivables 9.0A you will have to adjust or recreate these reports. See the Adagio Receivables Release Note or Readme help for details. GridView views for Inventory tables that reference Receivables tables will also require adjustment.

Upgrading to this Version from versions earlier than 8.1B

The Previously Opened database list is now saved by Adagio User rather than for all users. The first time an existing user or a new user logs into Adagio Inventory 8.1C they will be asked "Would you like your historical company access list set up?" Answer yes to have Inventory add all entries from the Previously Opened list from your prior version. It is no longer possible for all users to share the same Previously Opened list.

If you are using Purchase Orders for Adagio, the first time you run the Data Integrity Check (DIC) it may take a significantly longer time to complete if you have a large number of transactions in history (unless 'Bypass transaction history in DIC' is on in the Company Profile).

The Data Integrity Check of the Item Location file has been improved. The first DIC run after installing 8.1C may detect and rebuild errors in this file that were not detected in earlier versions. In most cases the errors detected did not cause any problems in the operation of Inventory program and are not a cause for concern.

Old formats such as Lotus, Dbase and Clipper that are almost never used any more have been removed from import / export templates, leaving Excel, ASCII CSV (Delimited), ASCII Fixed Length and PSV Delimited. The old formats may be manually turned back on for sites that need them by editing \sofrak\icwin\icwin.ini and adding section format lines as required:

```
[Import/Export Formats]
Lotus 123 ( Version 1.0 - 2.x)=1
Lotus 123 ( Version 3.0 - 5.0)=1
dBase III & IV=1
FoxPro (all versions)=1
Clipper (all versions)=1
Symphony (Version 1.0,1.1)=1
Quattro Pro (Version 1.0 - 6.0)=1
```

Upgrading to this version from versions earlier than 8.1A (2009.02.17)

If you did not previously install 8.1A (2009.02.17) or higher and run at least one Data Integrity Check (DIC), the following applies to you. Deleting an item now also deletes all transactions in history for the item. The DIC will detect and remove all transactions in history for items that have been previously deleted. This means the DIC will report these transactions as errors the first time you run it after installing this version of Inventory. These errors should not be a cause for concern. Rebuild will remove these transactions and they will not be there next time the DIC is run. If you have a large Historical database, please allow sufficient time for the rebuild process to complete.

If you are upgrading from version 8.0A or earlier refer to the Important Notes section of the Readme help to review important considerations before installing and upgrading to 8.1C. The Readme Help can be viewed by starting the install and clicking the View button. The install may be canceled after viewing the Readme.