Adagio® Inventory 8.1E (2014.04.28)
Release Notes

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

Adagio

BoM 8.1F	OrderEntry 8.1C - 8.1F
Console 9.1A	Payables 8.1A – 8.1F
DataCare 8.1A – 9.1A	Purchase Orders for Adagio 8.1B
ePrint 9.0A	PurchaseOrders 8.1C, 8.1D
GridView 8.1A – 9.1A	Receivables 8.1A – 9.1A
Invoices 9.0A - 9.1A	SalesAnalysis 8.1B – 9.1A
JobCost 8.1A - 8.1C	SalesCQ 8.1B - 8.1C
Lanpak 9.0E	Crystal Reports® for Adagio 8.5 - 8.5B
Ledger 8.1A – 9.1A	
MultiCurrency 8.1B	**Other**
ODBC 9.0A, 9.1A	MS Office 2003, 2007, 2010, 2013
	MS Windows Vista, 7, 8, 8.1

Upgrade Complexity
From prior version: Easy ●

Enhancements and revisions in Adagio Inventory 8.1E (2014.04.28)

♦ In Inventory 8.1E (2014.03.30), if you had formatted items (multiple segment item numbers) with a leading blank(s), the Data Integrity Check reported false orphan record errors for the item locations. Rebuilding these false errors resulted in making some items inactive at the location(s) setting quantities to zero for the items. Note: DataCare did not have this problem when checking IC data.

♦ When running on Remote Desktop Services (Terminal Services), after printing the Physical Inventory Worksheet with the 'Create physical inv. adjustment workfile' option enabled, you received an error when printing most reports from other modules until you logged out and back in.

♦ In Inventory 8.1C or higher you could not print the Adjustments Audit List report if the Stock Transfers Audit List report was disabled in the Security Group.

♦ An error was displayed when installing to a 2-Terabyte drive or larger, although the install completed without problems. The error has been changed to a warning.

Enhancements and revisions in Adagio Inventory 8.1E (2014.03.30)

New Features

♦ Full compatibility with Adagio Console. Supports Automation when Adagio Console is installed. Automation allows you to automate many functions in Adagio modules, including posting, importing, printing reports, backup and integrity check, etc. across modules, and view, print or email the results from an automation log.

♦ Adagio ePrint users can view PDFs of Adagio Invoices and OrderEntry invoices and credit notes associated with Shipments and Returns from the Item Inquiry with Sales and Costs function. The documents open in the new Adagio PDF viewer.

♦ Supports the Auto-fill GL account and department options in Ledger 9.1A.

♦ You can now add item notes when adding a new item without having to save the item first.

♦ Added BOM Item and BOM fields to the Transaction History record. These fields are updated by the automatic assembly of master items from Bills of Material during Day End in OrderEntry and/or Import Shipments (typically from Adagio Invoices) if Adagio BoM is installed. The BOM Item field allows you to track which master item the component items were used to assemble. The BOM field allows you to track which BOM created the transactions for both the master item and component items for an assembly in the case of master items with multiple BOMs. The new fields have been added to the ICW81 table and can be used in custom reports created with Crystal Reports for Adagio.

♦ The Edit Bill of Materials and Assemble Master Items screens can now be resized, allowing more component items to be shown.

♦ A grid showing the component items for the master item and BOM Number selected has been added to the Assemble Master Items function. The column editor can be used to show desired fields from the component items on the grid.

♦ Total On Hand, On PO and On Sales Order fields for the master item selected have been added to the Assemble Master Items function. Totals for the master item Location selected are also shown.

- The master item Description field is now available in the column editor for the finder in the Assemble Master Items function. This makes it easier when using finders to locate the master item.

- The From Location and To Location field names on the Assemble Master Items screen have been changed to Component Loc and Master Loc.

- Added ExcelDirect button to the grid in the Edit Physical Inventory function.

- The Shade Color for reports found in the Report Options tab in User Preferences now uses the full color pallet rather than just 8 solid colors.

- Added a new composite table 'I/C Items Master (1, 2, 3)' to the Inventory dictionary, with a link on vendor to allow GridView views to include the vendor name using Insert Related Column.

- Added several new IC specific Styles for use in item filters.

- The Data Integrity Check results now include the version/date of the program, for example: "Adagio Inventory 8.1E (140330)".

- The Open Data screen can be sized horizontally to allow you to see the full data path.

- A 'Report set' button has been added to the toolbar.

- The F1 key now launches Help when no windows are open.

- New splash screen with an updated look.

- The Help | About screen has been redesigned and includes a link to documentation page for the module that shows New Features, What's New video and manuals. It now has a Consultant tab showing the contact information for your Adagio consultant if they have enabled this option at your site.

- You can now delete the default import and export templates so they will not be selected accidentally instead of the correct template. If you delete all templates, you will receive a warning and when you reopen the import/export function, the defaults will be restored.

- Added Created Date/Time/User fields to the item record for use in grids, finders and GridView.

- Grids, filters, and finders now show the lookup values instead of the raw data values for several more typed fields in various tables. The lookup values are also available in GridView when the 'Translate coded fields' option is on.

Problems Fixed

- You could not remove or edit dates for reorder buckets in the Edit Item function.

- If your item number format is single segment, deleting an item with notes, where the item number was not the full length allowed, deleted notes from other items in some cases.

- For formatted item numbers, if you added an item in Adagio Inventory (or other modules) by copying and pasting the item number and you inadvertently included a CR/LF, the item was added and could be seen in grids and finders in any module but when selected an error displayed saying "Record not found". This is now prevented. If this has occurred, the Data Integrity Check detects and rebuild removes these items.

- PurchaseOrders writes a Sundry vendor code to an IC item if the company profile is set to 'Update IC primary vendor' when creating and saving a PO detail. The Edit Item function verified the Vendor Codes against Payables only and forced a clear if the Vendor field was edited and it contained a Sundry vendor. Sundry vendors are now supported.

- The Unit Cost displayed on the Edit Shipment screen was incorrect if you changed the Unit of Measure.

- Two character currency codes were not recognized for Alternate Price List items.

- In the column editor for the Edit Items function the Qty on SO and Qty on PO fields were reversed.

- The Item Dimensions fields on the Units tab in the Edit Item function did not obey the Implied Decimal setting in User Preferences.

- The Column Editor was not available on the Notes grid in the Edit Items function and did not show any fields in the View Items function.

- Several problems that caused incorrect information on the Backdated Item Valuation report have been corrected.

- Item numbers and names were being suppressed on the Item Valuation report that should not have been when printing 'Items by Location', in detail, with 'Restrict to nonzero qtys and costs'.

- For the Bills of Material report printed with the 'Include costs' option enabled, the Unit Cost column total was incorrectly printed as the Assembly Cost column total.

- With the "Suppress 0 qty items' option enabled on the Physical Inventory Worksheet report, inactive items were correctly suppressed but were not suppressed when the worksheet was exported to Excel.

- If you do not have Adagio Ledger, when you printed the G/L Transaction report and cleared it the error message "Critical Error: [1212] invalid path to data directory" was displayed.

- Importing new items in rare cases caused the Data Integrity Check to report the error "reorder summary does not match totals from locations".

- Import bill of material causes a Data Integrity Check in some cases..

- If you have Adagio ePrint, when converting to 8.1D if you answered Yes to the question asking to enable ePrint, the option, 'Allow PDF print?' was not enabled in the Company Profile.

- If you have Adagio ePrint, the message "Do you want to turn on Allow PDF printing for this dataset, and enable PDF Printing for all users?" is displayed the first time you open a database after converting from an earlier version of Inventory. However, if converting from versions earlier than 8.1C, the PDF settings were not made.

- Day End created a Payables invoice batch entry where the discount rate percentage was multiplied by 100 if custom terms with a discount were used and the invoice was paid within discount period.

- When 'Warn period end' is turned on in User Preferences and a period end had been run in the last 30 days, in some cases, a warning was displayed saying period end needed to be run when period ends had been done monthly. The program therefore calculated the period end frequency incorrectly.

- The Data Integrity Check reported an error "Size of formatted item does not equal size of segments", if the item number format had leading and trailing separators, for example" #XXX-XXXXXXXXXXXXX:".

- The Item Locations Reorder table was not being checked by the Data Integrity Check.

- In 8.1D (2012.01.26), the 'Bypass transaction history in DIC?' option did not work - history was always checked.

- The 'Warn only' and 'Disallow' options in 'Validate closed periods' in the Company Profile were not respected in the Item Assembly function.

- Physical Inventory was using the displayed Average Cost rounded to 2 decimals rather than the calculated Total cost / Qty on Hand to the required precision.

- The number of Previously Opened databases (saved by user) was increased from 25 to 100.

- When creating a new Security Group in 8.1D (2012.01.26), Report Sets was missing under Edit and there were blank nodes in the menu tree.

- In some cases Alt-X exported the grid to Excel when 'Enable SF export' was off in the User.

Enhancements and revisions in earlier versions of Adagio Inventory

- Refer to the Readme help file for details of enhancements and revisions in earlier versions or Historical Enhancements under Products on Softrak's web site.

Installing

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

If you are installing an upgrade, you need the serial number and install code from the upgrade download instructions 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 'Upgrading' sections 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 8.1E must be installed before the Service Pack can be installed.

To install Adagio Inventory (or an upgrade), 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 may also need 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.

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

Adagio BoM 8.1F (if used) is required for use with Inventory 8.1E.

Adagio Inventory 8.1E **requires Adagio MultiCurrency (if used) to be version 8.1B** or higher.

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

OrderEntry	8.1C (2010.05.07)
Purchase Orders for Adagio	8.1B
SalesAnalysis	8.1B (2010.05.05)
SalesCQ	8.1B (2011.03.18)

Upgrading to this Version from 8.1C or 8.1D   Upgrade Complexity: Easy ●

Before installing the new version you should perform a Data Integrity Check of your database(s) at your current version to ensure there are no integrity errors.

A database conversion is not required when upgrading from 8.1C or 8.1D.

If you have Adagio ePrint, the message "Do you want to turn on Allow PDF printing for this dataset, and enable PDF Printing for all users?" will be displayed the first time you open a database if it was not opened previously in 8.1D. Answer Yes to save having to manually enable PDF Printing for each user in the User Preferences function.

Adagio BoM 8.1F (if used) is required for compatibility with Inventory 8.1E. When upgrading to Inventory 8.1E, you must also upgrade BoM to 8.1F. If BoM is not upgraded, its functions will not be available in Inventory and no warning message is displayed.

Upgrading to this Version from 8.1B or earlier   Upgrade Complexity: Intermediate ■

A database conversion is required. 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 8.1E 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 8.1E 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.

Adagio Inventory 8.1E is not compatible with some earlier versions of Adagio Inventory. Adding and deleting items, or modifying the item description in versions earlier than 8.1C will cause data integrity errors. Do not attempt to open an 8.1E database with earlier versions. Earlier versions may open an 8.1E 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, Adagio Inventory 8.1E is not compatible with earlier versions of Adagio Invoices, OrderEntry, or Purchase Orders for Adagio. 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.

Column Editor settings are saved by grid by user by database in 8.1E, 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 8.1E.

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.

After converting, you may need to adjust your Security Groups (if you use them). When new menu choices are added to an Adagio product they are sometimes enabled by default for all Security Groups. You may need to edit each Security Group to restrict access to new functions as required.

GridView views originally created for Inventory 8.1B or earlier should be adjusted to use the 'Adagio Inventory 8.1C-8.1E' dictionary (@N81C) to ensure that the information displayed is correct. **Views used with GridView-RW MUST use current dictionaries to avoid the possibility of data corruption.** GridView 9.0A (2008.11.06) or higher has the ability to convert existing views when the dictionary changes with the release of an upgrade version of an Adagio module.

The GETEXTERNALDATA function added in GridView 9.0C (2010.10.01) allows you to create composite views without using tables from the composite dictionaries, such as 'Adagio {Composite Tables 9.0A}' (@Z90A), which are no longer maintained. Any views using the composite dictionaries should be updated to use the new function instead.

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   Upgrade Complexity: Intermediate ■

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 8.1D 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, 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 8.1E 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.

Upgrading to this version from versions earlier than 8.1A (2009.02.17)   Upgrade Complexity: Intermediate ■

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 8.1E. The Readme Help can be viewed by starting the install and clicking the View button. The install may be canceled after viewing the Readme.