Adagio® OrderEntry 9.2A (2015.07.29)

Upgrade Complexity from 8.1F   **Intermediate** ■

Release Notes

Compatibility

Adagio

BankRec 8.1B – 9.2A
BoM 9.2A
Console 9.1A
DataCare 8.1A - 9.1A
ePrint 9.0A
GridView 8.1A - 9.2A
Inventory 8.1A – 9.2A
Lanpak 9.2A
Ledger 9.0A – 9.2A
MultiCurrency 9.2A
ODBC 9.0A, 9.1A
PurchaseOrders 8.1C – 9.2A
Receivables 9.0A – 9.2A
SalesAnalysis 8.1B – 9.2A
SalesCQ 8.1B - 8.1C

Other

MS Office 2007, 2010, 2013
MS Windows Vista (SP2),
   7 (SP1), 8, 8.1
MS Server 2008R2 SP1 or higher
Crystal Reports® 2011 and 2013
   (requires Adagio ODBC 9.1A)
Crystal Reports 8.5 for Adagio
   (see note)

Note

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

Enhancements in OrderEntry

General Features

- You can now start other Adagio modules from toolbar buttons showing the icon for the module. This allows easy switching between Adagio modules. If a module is running against the same company data, Adagio will now just switch to that running instance, rather than launching a second instance. Toolbar buttons can be rearranged under File | User preferences, or by dragging the buttons around or off the toolbar itself.

- Adagio OrderEntry now logs user activity within the module, including login/out, menu choices, create/edit and print documents. Audit logs may be viewed with GridView.

- The Edit and View Customer functions in OrderEntry support customer changes in Receivables 9.2A.

- The Edit / View Customers / Items grids now display the total number of records, as well as a count of the displayed records when a Filter is active. An Ignore Style Color button has also been added. Click this button to toggle the grid between no color and Style colors or no color and banding (if it is enabled in User Preferences).

- Grids may be "banded" with a User Selectable color and banding frequency set under File | User Preferences. Filter Styles may be disabled and replaced with regular banding if desired.

- The status bar at the bottom of the main window now shows activity of various steps when the program is starting up and the database is opening.

- Updated splash screen with new Adagio logo and colors. Updated icon and toolbar button images.

- The Data Integrity Check (DIC) saves results for the last 9 previous runs in files OEWINERR01..09.dat (where .dat is your company data file extension). The current DIC information will always be in OEWINERR. If you do check/rebuild/check without closing the DIC function the results are appended to the same file.

- Adagio OrderEntry 9.2A now installs to the \Softrak\OrderEntry folder and the program name is OrderEntry.exe. Previous versions were installed in \Softrak\OEWin and had program name OEWin.exe.

Print Forms and Designer

- Added new specification code "C62 City, State/Province, ZIP/Postal (formatted)".

- Code 39 barcodes can be printed for any field on picking slips. Added 'Bar code font' field to the System tab in Options | Properties function in the designer. Note: The barcode font is not embedded in PDF email attachments and therefore it must be

installed on any computer that prints documents containing barcodes. Typically the font you use will be installed on all machines at your site but is not likely to have been installed at your customer's site. Thus barcode use should be limited to picking slips, although they will print on other documents. Barcodes will be embedded in a future release.

Reports

- Adagio OrderEntry's standard reports are now created using Crystal Reports 2013, replacing the Crystal Reports 8.5 Print Engine (CRPE32.dll). The module's management reports are now stored in \Softrak\OrderEntry\StandardReports. Revisions to these reports should be placed in \Softrak\OrderEntry\ModifiedReports. Custom reports to be added to the Reports menu should be stored in \Softrak\OrderEntry\CustomReports. Reports must be edited or created using Crystal Reports 2011 or 2013 and Adagio ODBC for access to the data files. Users will notice minor changes to some of the visual elements in the module and a new Print Preview window. The size and position of the Print Preview window are now remembered between sessions by user, so the Workstation options controlling this function have been removed. Exporting to an Excel spreadsheet from the print preview window has been significantly improved. Refer to the online Crystal help for details. The Report Tables Drive settings and Crystal tables in the \QRASP folder are not used by version 9.2A modules.

- Fields from tables that are not in the original standard report can now be added to modified reports. There are three restrictions: 1) tables can only be added to the main report, not sub-reports; 2) only tables from 9.2A dictionaries can be used; and 3) additional tables must have physical files in the data folder.

- An updated version of Adagio PrintTool (PT) is installed in \Softrak\PrintTool. PT allows you to print / preview custom reports without needing to run Crystal Reports itself or without placing the report on the Custom Reports menu in an Adagio module, and allows reports to be placed on the Windows desktop. PrintTool 9.2A prints custom reports created with Crystal Reports 2011 or 2013 only. Adagio ODBC must be installed to create custom reports but is not required to print custom reports. Your Adagio dealer or consultant can create custom reports for you and deploy them at your site. Note: PT does not print reports created with Crystal Reports 8.5 for Adagio. Existing version 8.5 custom reports must be converted before they can be printed by 9.2A. PT allows you to specify a report to print on the command line using the /r parameter. This allows Adagio automation batches to print custom reports (to printer – a future release of PT will allow automation batches to print custom reports to PDF). PT does not require registration with Softrak Systems but does use Adagio Lanpak licenses.

- A new ePrint code %CDT is available to put the 'Report/Age as of date' into either the PDF filename or folder name for the Aged Orders and Tax Tracking reports.

Problems Fixed

- If you changed the Sort Details option to sort by 'Loc/Item' on the Details tab and clicked the Keep Sort button, some lines no longer displayed in the grid in rare cases and could be lost from the order.

- When a Miscellaneous Charge was entered on an order for a customer with a Price List, while the Description of the Miscellaneous Charge appeared correctly, the actual Miscellaneous Charge Code displayed as though there were no Price List. After Day End, documents had the same problem.

- If the 'Ask Print OK after forms print?' and the 'Close forms dialog after print?' options in User Preferences are both enabled, the print dialog does not close unless you answer

'Yes' to the 'Everything printed OK?' question. This allows you to print another form for the same document or print and then email the same document.

- When printing a Picking Slip from the Orders grid, the confirmation message "Everything printed OK?" was not shown when you printed to printer or screen (but was for Fax, Email, File and PDF) if the 'Use selected specification' was selected on the print dialog, even though 'Ask Print OK after forms print?' was set in User Preferences. The 'Close forms dialog after print?' option is also now respected.

- In OrderEntry 8.1F for standalone databases (Inventory not used) an error occurred in the Display Items function.

- The finder and smart finder in the Edit ShipTo Addresses function were missing records for the Customer selected and showed blank lines in the grid if Receivables 9.2A was in use.

- The Adagio PDF viewer did not display accented characters (e.g. French language) correctly when viewing documents.

- Viewing a PDF of an invoice that was created by Adagio ePrint (using the AdagioPDF driver) and then appended with scanned documents from another source, caused the Adagio PDF Viewer to crash in some cases. This has been corrected. However, the Viewer may not show the scanned PDF correctly. This will be corrected in a future release. In the interim, the document can be open from your default PDF viewer by clicking the lower leftmost button on the Adagio Viewer.

- The 'Print Invoice/Credit Note audit list' option in Day End Processing is now remembered if 'Remember report settings?' is enabled in User Preferences.

- If the 'Include tax status summary' was not enabled when printing the Tax Tracking report, many of the fields in that section printed anyway.

- Import Alternate Price List Items for standalone OrderEntry (no Inventory) now allows importing the Category field.

- The Territory field when on the Field Defaults tab in an import template now has a finder.

- The Import Orders function no longer trims leading zeros from the ShipTo Code.

- The 'Header included?' option in Import Orders templates could not be selected. The option has been removed.

Enhancements and revisions in earlier versions

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 OrderEntry 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, you need the upgrade serial number and install code from the download instruction email. A previous version of Adagio OrderEntry 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 OrderEntry 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. If Adagio OrderEntry is installed on a network, you may also need to do a workstation install at each station running Adagio OrderEntry.

To determine if a workstation install is required, start Adagio OrderEntry 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 OrderEntry 9.2A **requires Adagio Lanpak (if used) to be version 9.2A** or higher.

Adagio OrderEntry 9.2A **requires Adagio MultiCurrency (if used) to be version 9.2A** or higher.

Adagio OrderEntry 9.2A **requires Adagio BoM (if used) to be version 9.2A**.

Adagio OrderEntry 9.2A **requires Adagio Receivables 9.0A or higher.** It is not compatible with Adagio Receivables 8.1A or earlier versions.

Adagio OrderEntry 9.2A **requires Microsoft Server 2008 R2 SP1** or higher if running under Remote Desktop Services (Terminal Services). OrderEntry 9.2A may be installed to Server 2008 R1 when used as a file server from a station on a LAN.

Adagio OrderEntry 9.2A is not compatible with Windows XP. The install and workstation install will display an error if run on XP. Note: Support from Microsoft for Windows XP ended April 8, 2014. There will be no new security updates from Microsoft. Running Windows XP after the end of support may expose your company to security risks.

Adagio OrderEntry 9.2A requires a minor database conversion from earlier versions. You should perform a Data Integrity Check in your current version of OrderEntry <u>before</u> 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.

If you have custom reports and/or views for OrderEntry created in Crystal Reports 8.5 for Adagio / Adagio GridView, they will require conversion and adjustment for use with 9.2A. You should not install the upgrade or convert OrderEntry data until you have a plan in place to update any custom reports and views critical to your operation. See the sections below on converting reports and views for details.

Upgrading

Upgrading from 8.1F   **Upgrade Complexity:**   **Intermediate** ■

Adagio OrderEntry 9.2A requires a minor database conversion from earlier versions.

You can convert your OrderEntry database at any time. To start the conversion, open your current database for the first time in OrderEntry 9.2A. A warning is displayed indicating the database will be converted and a backup must be made. The program allows you to make a backup before proceeding with the conversion if you have not already done so. The conversion should only take a few moments. After converting a database to 9.2A, it must not be used with earlier versions.

OrderEntry 9.2A is compatible with Receivables 9.2A. However, OrderEntry limits Customer name and address fields to 30 characters although these fields are 40 characters Receivables.

OrderEntry 9.2A now installs to the \Softrak\OrderEntry folder and the program name is OrderEntry.exe. Previous versions were installed in \Softrak\OEWin and had a program name of OEWin.exe. When an Adagio OrderEntry 9.2A upgrade is installed, it automatically uninstalls any prior version of Adagio OrderEntry.

The upgrade install cannot change any custom icons you may have created to launch OrderEntry and will display a "Problem with Shortcut" error if they are launched. You must change these icons manually to run OrderEntry from \Softrak\OrderEntry\OrderEntry.exe or create new ones.

In February 2015, vitalEsafe announced they will be eliminating their secure web based file-by-file storage services on August 31, 2015. Accordingly, the vitalEsafe upload function to backup data is removed from Adagio modules. There are several alternative services you may want to consider.

Adagio 9.2A uses the current version of the Crystal Reports runtime engine with Adagio ODBC drivers to view and print reports, replacing the Crystal Reports 8.5 Print Engine (CRPE32.dll). Adagio 9.2A installs Crystal Reports runtime and if not already installed on your machine, the Microsoft® .NET Framework. The Adagio install will automatically download these install packages from the internet as required. Adagio ODBC drivers are installed by version 9.2A applications – Adagio ODBC does not need to be installed to print reports.

While users are printing / previewing reports, the Active Users List function in Adagio shows the User Name in application "Adagio Reporting". The Active Users List in Adagio Console and the Currently Logged In List in Adagio xConsole show a grid row with App Prefix of "OD" (ODBC) for users printing / previewing reports. A Lanpak license is not used to print or preview reports.

Reports in Adagio OrderEntry have been converted for Crystal Reports 2013 and can be modified with Crystal Reports 2011 or 2013. Custom reports created with Crystal Reports 2011 or 2013 can be added to the Reports menu by placing them in \Softrak\OrderEntry\CustomReports. The Report Tables Drive settings and Crystal tables in the \QRASP folder are not used by version 9.2A modules.

The report viewer remembers the window size, position and zoom level. Therefore, the Print/Preview options, including Preview Zoom Factor and Preview Window State (Full screen / Partial screen) were removed from Workstation Options.

Adagio module buttons have been added to the toolbar for 9.2A. They will be enabled by default. The 'Adagio Toolbar' option in User Preferences on the General tab is used to configure the toolbar.

Converting GridView Views

A data dictionary change from 'Adagio OrderEntry 8.0A-8.1F' (@O80A) to 'Adagio OrderEntry 9.2A' (@O92A) was required in order to support new features added for this version. GridView views created for earlier versions of Adagio OrderEntry should be

recreated using tables from 'Adagio OrderEntry 9.2A'. GridView has the ability to convert existing views to a new table.

Note: The 9.2A data dictionaries contain 2 tables for each physical file - one for use by the Adagio module and one for use by its reports. The table Descriptions for the module start with "O/E or OE" and ones for use by its reports do not. When creating new views you must use the tables starting with "O/E or OE". A future release of GridView will hide tables used by the reports so they cannot be used inadvertently. Tables starting with "OE" (no slash) are composite tables and can be used to create views.

GridView views created with the previous dictionary will continue to work without any change. However, it is recommended you convert all your views to use the new 'Adagio OrderEntry 9.2A' dictionary.

Views from your prior version located in \Softrak\OEWin\Views will be copied to the folder \Softrak\OrderEntry\Views.priorversion. Recreated views must be placed in \Softrak\OrderEntry\Views. When you are certain the original views are no longer needed, you can delete the \Softrak\OrderEntry\Views.priorversion folder.

See the Tech-Tip and Show Me How video on converting GridView views on Softrak's website at http://www.softrak.com/resources/technicaltips/technicaltips.php. You must scroll to the Tech-Tips.

You may find the Adagio Data Dictionary Exporter Tool useful for comparing tables in the Adagio OrderEntry 9.2A dictionary to previous versions using Excel. The exporter can be found under on Softrak's website at http://www.softrak.com/resources/technicaltips/technicaltips.php.

Converting Modified and Custom Reports

If you have modified any of the standard reports installed by Adagio OrderEntry, you will have to redo those modifications for OrderEntry 9.2A. Modified reports are files with a .rpt extension that you copied from \Softrak\OEWin\StandardRP to \Softrak\OEWin\ModRP and modified using Crystal Reports 8.5 for Adagio. Your modified reports from your prior version will be copied to the folder \Softrak\OrderEntry\ModifiedReports.priorversion. These same reports must be recopied from \Softrak\OrderEntry\StandardReports to \Softrak\OrderEntry\ModifiedReports and remodified using Crystal Reports 2011 or 2013. Adagio ODBC must be installed to be able to do this. Or, your Adagio dealer or consultant can modify reports for you and deploy them at your site.

When you are certain the original modified reports are no longer needed, you can delete the \Softrak\OrderEntry\ModifiedReports.priorversion folder.

Custom reports created in Crystal Reports for Adagio for earlier versions of OrderEntry will have to be converted or recreated. Your custom reports from your prior version will be copied to the folder \Softrak\OrderEntry\CustomReports.priorversion. Converted or recreated custom reports must be placed in \Softrak\OrderEntry\CustomReports.

A Report Convertor Utility is available from Softrak Systems for the purpose of converting Crystal Reports 7 and 8.5 reports that use the old Crystal Reports Print Engine (CRPE32.dll) to Crystal Reports 2011/2013 format, using the Adagio ODBC driver. Converted reports can be edited and new reports can be created using Crystal Reports 2011 or 2013. Adagio ODBC

must be installed to be able to do this. **Only reports built using the most recent QRT*.QRW tables can be converted.**

Note: Custom reports created with Crystal Reports 8.5 for Adagio for prior versions of OrderEntry will continue to work in most cases when printed from the Crystal 8.5 designer, Adagio PrintTool 8.5 and the Custom Reports menu of Adagio modules at versions prior to 9.2A. This is because the data structure for OrderEntry 9.2A did not change significantly. Existing custom reports cannot be printed from the Custom Reports menu of OrderEntry 9.2A and may not function for future versions of OrderEntry.

The Report Convertor Utility and related files are installed to \Softrak\System\ReportConvertor. It converts reports created with Crystal Reports 7 and 8.5 but will also convert reports from 9.2A to future versions of Adagio.

See the Tech-Tip and Show Me How video on converting reports on Softrak's website at http://www.softrak.com/resources/technicaltips/technicaltips.php.

Softrak provides only limited support on the Report Convertor. We do not support new versions of Crystal Reports itself, except as support is related to assisting you to locate data in the Adagio tables. Softrak no longer provides support for Crystal Reports 8.5 for Adagio.

As Adagio 9.2A reports use the same data dictionaries as the application, the Adagio Data Dictionary Exporter tool (DDE) is useful for locating the tables and fields in the Adagio OrderEntry 9.2A dictionary. The DDE program, help and manual can be run from the Windows Start menu.

The 9.2A data dictionaries contain 2 tables for each physical file - one for use by the Adagio module and one for use by reports in 9.2A modules. Standard reports in the modules and custom reports created with Crystal Reports 8.5 for Adagio use tables where the description ends with "(View)" in the DDE. The standard tables used by the module (and by GridView) do not. In Crystal Reports, the View table names end with "crview" (eg. aol92ahedcrview). Standard tables do not (eg. ao92ahed). Use the "crview" tables for modified reports or when converting existing custom reports. When creating new reports, use the standard tables without "crview". Future versions of Adagio will begin to use the standard tables for reporting. You must create a shortcut and add the parameter /ODBC to include the "crview" tables in the export to Excel.

When you are certain the original reports are no longer needed, you can delete the \Softrak\OrderEntry\CustomReports.priorversion folder.

An updated version of Adagio PrintTool (PT) is installed in \Softrak\PrintTool. PT 9.2A prints custom reports created with Crystal Reports 2011 or 2013. It uses the Crystal Reports runtime engine. Adagio ODBC must be installed to create custom reports but is not required to print custom reports. Your Adagio dealer or consultant can create custom reports for you and deploy them at your site. Note: PT does not print reports created with Crystal Reports 8.5 for Adagio. Existing version 8.5 custom reports must be converted before they can be printed by 9.2A.

Upgrading from 8.1E   **Upgrade Complexity:**   **Intermediate** ■

Adagio OrderEntry data will be converted for use with 9.2A.

OrderEntry 9.2A is not compatible with earlier versions of Adagio OrderEntry. Posting in previous versions can cause data integrity errors. Do not attempt to open a 9.2A database with earlier versions. Earlier versions may open the database without any warning but use of those versions can result in errors.

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.

Note: The Purge Options have been moved from the Optional/Specs tab to the Number/Tax tab in the Company Profile.

Upgrading from 8.1D   **Upgrade Complexity:**   **Intermediate** ■

The options 'Ask Print OK after forms print?' and 'Close forms dialog after print?' were added to User Preferences. Both options are enabled by default. You should review the changed behavior related to these new options and any effect they may have on your procedures.

Upgrading from 8.1C or earlier   **Upgrade Complexity:**   **Intermediate** ■

After converting, you may need to adjust your Security Groups (if you use them). This release adds Special Prices to the File | Import and File | Export menus. These new menu choices will be disabled for all existing Security Groups. You will need to edit each Security Group to enable access to new functions as required.

If you are upgrading from versions prior to 8.1C (2010.05.07), and you have items where the Pricing Unit does not match the Costing Unit, you must complete DayEnd before installing this upgrade. After this version is installed: 1) when a credit note is created for an existing invoice, the Unit Cost will default from the original invoice. If the original Costing Unit was different than the Pricing Unit, the unit cost will need to be adjusted before the credit note is posted; 2) unshipped orders for items or alternate price list items that use User specified costing will need to be modified to ensure that the unit cost matches the new unit on the detail (i.e. the Pricing Unit). Note: If your Pricing and Costing Units are always the same, this does not apply to you.

Upgrading from 8.1B or earlier

This Release Notes does not cover upgrading from 8.1Bor earlier versions. If you are upgrading to 9.2A from these versions, **before installing the upgrade**, it is important to review this information in the 8.1F Release Notes on Softrak's website.