Release Notes

Compatibility

Adagio

BankRec 9.2A - 9.3A
BoM 9.3B
Console 9.2A - 9.3A
CatchWeights 9.3B
DataCare 9.2A, 9.3A
DocStore 9.3A
ePrint 9.2A
GridView 9.2A - 9.3B
Inventory 9.2A - 9.3A
Lanpak 9.3B
Ledger 9.2A – 9.3B
MultiCurrency 9.2B
ODBC 9.2A
Payments 9.3A or higher
PurchaseOrders 9.3A or higher
Receivables 9.2A,9.3A or higher
  if Adagio Payments is used
RMA 9.3B
SalesAnalysis 9.2A or higher
SalesCQ 9.2B or higher

Other

MS Office 2010/13/16/19/21, 365
MS Windows 8, 8.1, 10,11
MS Server 2012 R2 or higher
Crystal Reports® 2013 - 2016
  (requires Adagio ODBC 9.2A)

Note

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

Enhancements & Revision

- Compatibility with Inventory 9.3B.

- With Inventory 9.3B there is a new Company Profile, Processing Options tab, Detail option: 'Respect I/C minimum quantity'. If this option is selected, the Item's 'Minimum Qty' will be checked in Document entry and posting.

- If "Format address?" is not selected for Customer, Bill To or Ship To Address, Printing documents will include the Country field in a Compressed or Formatted Address.

- Invoice Favorites for Print Invoices have been updated to save the 'Reprint invoices already printed' option. Existing Favorites should be resaved to ensure that the option is stored properly.

- In Document Entry, the Item Information display for Current/Open Orders no longer includes Standing Orders.

- In Document Entry, the Item Information display for Current/Open POs no longer includes Standing Orders.

- New Orders, Credit Notes and RMAs created from the Historical Orders/Invoices/Credit Notes Inquiry include the Customer Report Group.

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 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.

If you are installing OrderEntry after GL9.3B, BR9.3A, AP9.3BorC and/or IC9.3A have already been installed, after installing OrderEntry, run OrderEntry from a workstation and:

(a) If you receive an error or warning messages pertaining to an aspect of **Adagio reporting**, drill down and run Softrak\System\ChkSys.exe from the server and follow any instructions given. Respond to the prompts accordingly.

(b) If you receive a message indicating that a workstation install must be performed, carefully read and follow the screens that are presented to you. Respond to the prompts accordingly.

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 9.3B (2024.11.26) installs a new version of the SAP Crystal Reports™ runtime engine for .NET Framework (SP25) used to print/preview reports. **This will require a workstation install on all stations that run Adagio**, regardless of whether Adagio OrderEntry is run from a given station, unless another module that installs SP25 has already caused a workstation install for this reason. If a station does not run OrderEntry then untick the shortcuts and Start Menu options when running the workstation install. Other modules with a release date after October 23, 2019 may or may not install SP25. Eventually, all modules will do so.

After installing OrderEntry (or any other module that installs Crystal SP25 in the future) **you must do a workstation install for any current version Adagio module on each workstation**, even if the station never runs OrderEntry. When any Adagio module is run on a workstation for the first time after OrderEntry 9.3B has been installed, a workstation install will be launched automatically if required. Only this one workstation install has to be done. No other modules will require a workstation install.

However, if running an older module **that did not install Crystal SP25 runtime** and you receive a workstation requires updating message, its regular workstation install will be intercepted by the newer Workstation Common Setup. After, a message will be displayed stating the regular workstation install has already been run and indicating that you should **NOT** continue to the regular install as it is obsolete. You should select to **Exit** at this point.

When installing Adagio at a new site or to a new server, Adagio OrderEntry 9.3B should be installed last (any module that installs the new version of the Crystal Reports

runtime engine (SP25) can be installed last instead). If after installing OrderEntry, you install other modules with a release date older than the date of this OrderEntry release, or any module that does not install Crystal SP25, the error "Failure to initialize the Adagio Reporting environment." will be displayed when you start the module. To correct this, run the System Status function from the Help menu of any module or run \Softrak\System\chksys.exe. You need to have local administrator rights on the station to do this. If User Account Control is enabled, you will be prompted to allow the program CHKSYS.EXE to run and must do so. The following message will be displayed and you should proceed to update the files.

> **Reporting File Needs Updating!** This utility has detected that the Softrak Reporting DLL [SoftrakSystems.Adagio.Reporting.dll] needs to be updated in one or more Adagio folders. Unless you have specific circumstances to delay this action, you should update the needed files now. Do you want to update the needed files?

Adagio OrderEntry 9.3B installs a new version of the Adagio ODBC driver used to print reports. The new driver is AdagioODBCv3.dll. It is installed in the \Softrak\ODBCV2 folder. Reports printed by all Adagio modules, including all versions, will use this new driver. The prior version of the driver (AdagioODBCv2.dll) remains installed and will continue to be used by existing ODBC connections (for any DSN created with the module Adagio ODBC) without change. Installing Adagio module versions released prior to BankRec 9.3A that do not install the new driver will set the driver used back to AdagioODBCv2.dll. Reports from BankRec will continue to work.

Adagio OrderEntry 9.3B installs a new version of the printer driver used to print documents and reports to PDF for DocStore users. The new driver name is AdagioV3PDF. This driver uses novaPDF version 10.

NOTE: Modules that have not been updated to use AdagioV3PDF printer driver cannot print to that driver from the printer list. However, DocStore users will have no problem ePrinting reports to PDF or printing forms to PDF.Adagio.

OrderEntry 9.3B requires Adagio Lanpak (if used) to be version 9.3B or higher.

OrderEntry 9.3B requires Adagio MultiCurrency (if used) to be version 9.2B or higher.

Adagio OrderEntry 9.3B **requires these versions** or higher of the following modules (if used). **Earlier versions of these modules will not open or may open but will not work if OrderEntry 9.3A data is present, with errors resulting**. OrderEntry 9.3A also requires certain versions of other modules (if used) that are not listed here. See the compatibility information at the top of this release note.

> Lanpak 9.3A
> MultiCurrency 9.2B
> BankRec 9.2A (2017.07.20)
> Adagio BoM 9.3B
> Inventory 9.2A (2017.06.08)
> Invoices 9.2A (2017.08.30)
> JobCost 9.2A (2017.10.20)
> Payables 9.2A

Payments 9.3A
PurchaseOrders 9.3A
Receivables 9.2A (2017.07.11)
Receivables 9.3A (2018.11.09) if Adagio Payments is used
RMA 9.3B
SalesAnalysis 9.2A (2017.09.04)
SalesCQ 9.2B
Time&Billing 9.2A (2017.10.24)

Upgrading

Upgrading from 9.3A   **Upgrade Complexity:**   **Intermediate** ■

For this version, the Find button on the current and history grids is enabled when a filter is applied. You can use the Finder and Smart Finder to search within the filtered grid. You must run one Data Integrity Check in OrderEntry or DataCare to make the Find button available on filtered grids. This first DIC may be significantly slower than normal depending on the number of filters you have defined (especially for history) and the number of matching documents in those filters.

Adagio OrderEntry 9.3A (2018.12.14) and higher support online payment (credit card) processing (if Adagio Payments is installed). It is compliant with the Payment Card Industry Data Security Standard (PCI DSS). Adagio Payments requires Receivables 9.3A. In order to achieve PCI compliance, **the Receivables 9.3A conversion removes credit card numbers stored in customer records** and replaces them with a field containing only the last 4 digits. **Likewise, credit card numbers in OrderEntry current and history documents will be removed and replaced.** If you are upgrading to Receivables 9.3A, it is important that you read the Adagio Receivables 9.3A Release Notes section on Upgrading.

If you take online credit card payments in OrderEntry you must use the 'Direct' method to interface with Adagio Receivables. The 'Retrieval' method is not supported.

Upgrading from 9.2A   **Upgrade Complexity:**   **Intermediate** ■

Note: if you have complex custom reports in Crystal Reports and/or views in Adagio GridView the Upgrade Complexity may be **Difficult ♦**.

Field selections you have made in the Column Editor for grids may be altered when you upgrade due to the significant data structure changes in 9.3A. Filter definitions may also be altered. You should make note of these settings in 9.2A <u>before</u> installing and upgrading to 9.3A to assist you with adjusting these settings as needed after upgrading.

Installing the upgrade:

Adagio OrderEntry 9.3A is a major upgrade, containing many changes and new features. It is very important to review the information below before installing the upgrade.

OrderEntry 9.3A requires some Adagio modules (if used) be at a certain version or higher. See the list above and check the compatibility chart. Do not install OrderEntry 9.3A until

you are certain you have all the compatibility releases required at your site available to be installed.

The data structure was changed and expanded significantly for the OrderEntry 9.3A release. The internal database version changed for 9.3A. **Programs from Adagio Developer Partners (ADPs) that read or write the OrderEntry data will require a compatibility upgrade.** Check with the developer or your Adagio dealer to ensure an upgrade is available before installing or upgrading to OrderEntry 9.3A.

Adagio OrderEntry 9.3A requires a significant database conversion from earlier versions. You should perform a Data Integrity Check in your current version of OrderEntry 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.

If you have custom reports for OrderEntry 9.2A created in Crystal Reports 2011/2013/2016 or in Crystal Reports 8.5 for Adagio, they will require conversion and adjustment for use with 9.3A. If you have GridView views for OrderEntry 9.2A, they will require conversion and adjustment for use with 9.3A. 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.

Converting your database:

Adagio OrderEntry 9.3A requires a significant database conversion from 9.2A.

You can convert your OrderEntry 9.3A database at any time. To start the conversion, open your current database for the first time in OrderEntry 9.3A. A warning is displayed indicating the database will be converted and a backup must be made. The program allows you to make a backup at this time, before proceeding with the conversion. You should do so if you have not already made a backup.

If you are converting databases for other modules at the same time, the order in which you convert is not significant, with the following exceptions:

- If you are also converting Adagio SalesCQ you must convert OrderEntry first. OrderEntry 9.3A is not compatible with version of Adagio SalesCQ earlier than 9.2B.
- If you are converting from OrderEntry 9.2A (2015.07.29), and **if you retrieve batches from OE into Adagio Receivables** (i.e. you use 'Retrieval' rather than 'Direct'), **you must retrieve your batches in AR before converting your OE data**. If a batch exists that has not been retrieved in AR, the conversion process will warn you and the conversion will not proceed until you have done so.

The conversion should only take a few minutes. However, it could take a significant period of time on databases with a large number of documents in current and/or history over a network. For large databases, you may want to copy your database to a local machine, convert the data, and then copy it back. The conversion on a local drive could be 10 times faster or more. We strongly recommend you contact your Adagio consultant for assistance with this procedure.

Adagio OrderEntry 9.3A supports "formatted addresses" - it maintains separate fields for City, Province/State and Country; whereas in previous versions, this information was contained in free-formatted address lines. It will convert the information in address lines from previous versions to populate the City, Province/State and Country fields, at the same

time removing this information from the address lines. Generally you should only use formatted addresses if you are located in Canada or the USA, and if you format vendor addresses in Receivables.

The conversion will ask you if you want to attempt to format your addresses according to conventions used. The conversion only formats addresses for vendors in North America. It will populate the Country field for international customers if it can, although the address will be left unformatted.

After converting your database:

After converting, you should immediately run a Data Integrity Check.

Existing specifications (order, invoice, credit note, etc.) from versions prior to 9.3A will continue to work without requiring changes, regardless of whether you elected to format addresses. However, you may want to adjust your specifications to use new features in 9.3A, including: larger Document Number field (12), larger Reference field (24), formatted Bill To and Ship To addresses, larger customer name and address fields (40), and Optional Fields on details.

OrderEntry 9.3A has unlimited Miscellaneous Charges. New Footer specification code 'F53 total by misc charge description' was added to support unlimited Miscellaneous Charges. Versions prior to 9.3A were limited to 10. Totals for each of those 10 print using codes F07 to F12, and F17 to F20. These existing codes continue to work so that existing specifications continue to work without change. However, if you use more than 10 you will need to use F53.

Specifications in the sample data and in document templates in the designer have been updated to use formatted addresses fields. The ALL Codes specification (OE$ALL) has been updated to show all new specification codes. Specifications are not downward compatible with earlier versions.

You may want to turn on the 'Suppress home country on forms' option on the System Options tab. This suppresses the Country from printing in the address on documents for customers in your own country.

The Reference field in the Transaction History file in Adagio Inventory (10 characters) does not yet fully support the increased Document Number size in OrderEntry (now 12 characters, was 8 in prior versions). The Document Number will be truncated in the Reference field if you use more than 10 characters in OE. In addition, for Adagio ePrint users, if you use more than 10 characters you will not be able to link from transactions in the Inventory History grid to the OE Invoice or Credit Note PDF document.

The 12-character field 'OE93A Document Number' has been added to the I/C Transaction History file as a temporary solution to store the extended 12-character OE Document number. This field is available for use in custom Crystal reports and GridView views. Adagio Inventory itself will not use this field until new version is released, although it is available in grids. The field is only populated going forward after OrderEntry 9.3A is used.

The Archived Transactions file in Adagio SalesAnalysis does not yet support the increased Document Number size (now 12 characters, was 8 in prior versions) in the 'Order no.' field. It also does not yet support the increased 'Reference' field (now 24 characters, was 12). There will be a loss of information in these fields if you use the increased size, archive and

later restore the archived file in SA. The Invoice number was increased to 12 characters from 8. The Archived Transaction file does support the increased size and there is no loss of information for the Invoice number when restoring.

Other changes have been made to the data structure that may affect custom reports and view. Fields in the O/E Options file have been moved to an expanded Company Profile file (OEGLOB) and the Option file is no longer used. The O/E Order Status Log (OEOLOG), O/E Commission Report (OECOMM), and O/E Sales Summary (OESALES) files have been expanded and are now indexed for speed. The Invoice and Credit Note Audit List files have been expanded. The Tax Tracking file has been expanded.

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 9.3A. Any modified reports will be located in \Softrak\OrderEntry\ModifiedReports. These same reports must be recopied from \Softrak\OrderEntry\StandardReports and re-modified using Crystal Reports 2013 or 2016. 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.

If you have custom reports, they will have to be converted or recreated. Any custom reports will be located in \Softrak\OrderEntry\CustomReports or its subfolders.

A Report Convertor Utility is available from Softrak Systems for the purpose of converting custom reports created with Crystal Reports 2011, 2013 or 2016 for OrderEntry 9.2A to work with 9.3A. See the Tech-Tip "ConvertingCustomCrystalReportsToHigherAdagioVersion.pdf". The Report Convertor Utility and related files are installed to \Softrak\System\ReportConvertor.

Also see Tech-Tips and Show Me How videos on creating and converting reports on Softrak's website at http://www.softrak.com/resources/technicaltips/technicaltips.php. You must scroll to the Tech-Tips.

Note: If you are upgrading from OrderEntry 9.2A but you did not update your custom reports created in Crystal Reports for Adagio 8.5 when you upgraded to 9.2A, you WILL have to update them for 9.3A. To do this using the Report Convertor you must get the Mapping Table file (TableInfo.txt) that has been changed to update to 9.3A rather than 9.2A. First, make a backup of the existing TableInfo.txt in \Softrak\System\ReportConvertor. Then copy TableInfo.txt in \Softrak\System\ReportConvertor\ForOE93A to \Softrak\System\ReportConvertor. If your custom 8.5 reports were already converted for 9.2A the mapping table is not required to convert your reports and you can ignore this step.

Softrak provides only limited support on the Report Convertor. We do not provide support for Crystal Reports, except as support is related to assisting you to locate data in the Adagio tables. The Adagio Data Dictionary Exporter tool (DDE) is useful for locating the tables and fields in the Adagio OrderEntry 9.3A dictionary. The DDE program, help and manual can be run from the Windows Start menu.

The 9.3A data dictionary contains 2 tables for each physical file - one for use by the Adagio OrderEntry program module and one for use by its reports. Standard reports 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" (e.g. ao93ahedcrview). Standard tables do not end with "crview" (e.g. ao93ahed). 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 in the DDE. Note: the "crview" field names are not prefixed with the application code (e.g. "OE").

For OrderEntry 9.3A the Extension files for document header and detail tables present in prior versions have been combined into the main table. The Master and Extension tables are no longer needed and do not exist. **Therefore, custom reports using the Master or Extension tables for Sales Order (current) or History documents cannot be converted by the Report Convertor utility. They must be converted manually in Crystal Reports.** This is the case whether the custom report was written using Crystal Reports for Adagio 8.5 or written for or converted to the "crview" table in Crystal Reports 2011-2016, or written for the standard tables in Crystal 2011 – 2016.

Composite tables using Extension tables are no longer required and have been removed for the OrderEntry 9.3A dictionary. The Composite tables 'OE Ord Detail /w Head' and 'OE Hst Detail /w Head' are available for use in GridView views.

See the Tech-Tip "ManuallyConvertingCustomCrystalReports.pdf". The Report Convertor Utility and related files are installed to \Softrak\System\ReportConvertor.

The single bit-mapped Print Status field in documents has been removed and replaced with individual fields: Order printed, Invoices printed, Credit note printed, Label printed, and Picking slip printed. These fields are Boolean (Yes / No) rather than a bit-mapped variable, making selection by print status much simpler in custom reports. Custom reports using the Print Status field in previous versions will require adjustment of fields and selection formulas.

For OrderEntry 9.3A, many fields commonly reported on in custom Crystal reports have been added to the header and detail tables to reduce the necessity of linking to other tables. You may want to modify your existing custom report do take advantage of this. Using these fields instead of linking to other tables simplifies reports and may speed up such reports noticeably.

In the header these include:
   Salesperson name
   Customer report group.

In the detail these include:
   Category description
   Category commission rate
   Category commission paid?

Converting GridView Views

A data dictionary change from 'Adagio OrderEntry 9.2A' (@O92A) to ' Adagio OrderEntry 9.3A ' (@O93A) was required in order to support new features added for this version. GridView views created for earlier versions of Adagio OrderEntry must be recreated using

tables from 'Adagio OrderEntry 9.3A'. GridView has the ability to convert existing views to a new table.

Note: The 9.3A 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". GridView 9.2B and higher hides 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.

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 Export Tool useful for comparing tables in the Adagio OrderEntry 9.3A 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.

Current and History tables were harmonized for 9.3A. Converting GridView views based on the History Header Master will encounter errors if certain fields are used in the view. The errors will be similar to 'The data set '@O92AHHM' does not exist! Missing secondary files for the set and '@O92AHHD' followed by 'Encountered an improper argument'. The conversion will fail and the view should not be saved. A future release of GridView will enhance the conversion of fields using partial matching and prevent these errors.

If any of these fields are used in a History Header Master view there will be errors during conversion. Do not save the view if this occurs. Remove these fields from the view and formulas within the view. The view can then be converted and saved.

    Posting Seq
    G/L Posting Seq
    A/R Posting Seq
    Home Currency
    Source Currency
    Rate Override
    Foreign Rate Override

Composite tables using Extension tables are no longer required and have been removed for the OrderEntry 9.3A dictionary. The Composite tables 'OE Ord Detail /w Head' and 'OE Hst Detail /w Head' are available for use in GridView views.

The single bit-mapped Print Status field in documents has been removed and replaced with individual fields: Order printed, Invoices printed, Credit note printed, Label printed, and Picking slip printed. These fields are Boolean (Yes / No) rather than a bit-mapped variable, making selection by print status much simpler. GridView views using the Print Status field in previous versions will require adjustment of fields and selection formulas.

Upgrading from 8.1C - 8.1F　　　　**Upgrade Complexity:**　　　**Difficult ♦**

This Release Notes does not cover upgrading from 8.1C - 8.1F. If you are upgrading to 9.3A from these versions, **before installing the upgrade**, it is important to review this information in the 9.2A Release Notes on Softrak's website or the OrderEntry Readme help.

Upgrading from 8.1B or earlier　　　　**Upgrade Complexity:**　　　**Difficult ♦**

This Release Notes does not cover upgrading from 8.1B or earlier versions. If you are upgrading to 9.3A from these versions, **before installing the upgrade**, it is important to review this information in the 8.1F Release Notes on Softrak's website or the OrderEntry Readme help.