

## Compatibility

### Adagio

Console 9.1A, 9.2A  
DataCare 9.2A  
ePrint 9.0A, 9.2A  
GridView 8.1A - 9.2A  
Inventory 8.1E, 9.2A  
JobCost 8.1B - 9.2A  
Lanpak 9.2B  
Ledger 9.0C - 9.2A  
MultiCurrency 9.2A  
ODBC 9.1A, 9.2B  
OrderEntry 8.1D - 9.2A  
Payables 8.1E - 9.2A (required)

### Other

MS Office 2007, 2010, 2013  
2016, 365  
MS Windows Vista (SP2),  
7 (SP1), 8, 8.1, 10  
MS Server 2008R2 SP1 or higher  
Crystal Reports® 2011 and 2013  
(requires Adagio ODBC 9.2A)

### Note

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

## Enhancements in PurchaseOrders

### Purchase orders and other documents

- Vendor addresses on documents and Pickup, Ship/Bill To, and Sundry Vendor addresses can be formatted, including dedicated fields for City, State/Prov and Country. The company address in the Company Profile may also be formatted.
- The size of these fields on documents, Pickup, Ship/Bill To, and Sundry Vendor addresses has increased:

Name increased from 30 to 40 characters

Address lines from 30 to 40

Contact from 18 to 30

Comments from 30 to 40.

- PurchaseOrders 9.2B supports Payables 9.2A formatted vendor addresses and increased field sizes. Generally you would not use formatted addresses in PurchaseOrders unless you also use them in Payables.
- The Bill To and Ship To addresses are now stored in the purchase order and other documents. Address fields can be changed during document entry and saved with the document. This allows you to enter an address on the document for one-time use without having to add a Bill/Ship To address. Changed addresses flow to receipts and history allowing the changes to be viewed, printed or restored.

- Added Optional Fields to the Header for purchase orders, receipts and requisitions. Vendor optional fields are defaulted from the Payables or Sundry Vendor.
- PurchaseOrders 9.2B supports Optional Fields at the batch level in a future release of Payables 9.2B. Day End sends Optional Fields from receipts to Payables 9.2B invoice batches.
- Added Last Maintenance and Created Date, Time and User stamp fields to purchase orders and other documents. They are available in grids and finders, custom reports and in GridView.
- Added Approval Date, Time and User stamp fields to Requisitions. These fields flow through to other documents and are available in grids and finders, custom reports and in GridView.
- Document files including purchase orders, requisitions, receipts and history, as well as details, have been harmonized to the use the same structure. Details are now in a single file rather than having an extension file. These changes make creating custom views and reports easier.

### Purchase order document entry

- The Vendor Name is now available to show in the PO Document List by selecting it in the Column Editor for grids. The Vendor Name is also now available to show in the Details grid – useful for purchase orders that have items from multiple vendors.
- Adagio ePrint users can view a PDF of purchase orders from the Document List, Document Inquiry and History functions.
- In Edit Sundry Item and Edit Miscellaneous Charges, you can save with just a GL Account but leave the Department blank. The Account is validated but the Department is not validated if blank. This allows companies running with multiple departments to default the Account but specify the Department when entering the purchase order. When a purchase order is saved, both the Account and Department are validated.
- Added Manual Styles in purchase orders and other documents.
- Added a 'Find Vendor' button on the Document Detail dialog to allow you to find a Payables Vendor by Name or Phone (and a Sundry Vendor by Name) when adding item details for a vendor that is different from the primary vendor.

### **Edits**

- PO Header Optional Fields have been added to 'Send to G/L' Description 1 and 2 for User Defined on Ledger Interface tab in the Company Profile:

%hs1..3 – Header Optional String 1..3

%hd1..2 – Header Date 1..2

%ha1..2 – Header Amount 1..2

%hu1..2 – Header Units 1..2

- Added a Find button to the Edit Ship/Bill To Addresses function.
- Added a Find button to the Edit Miscellaneous Charges function.
- Added ExcelDirect to the Edit Pickup Addresses function.
- Added Optional Fields to Sundry Vendors.
- The Items with Sales/Costs inquiry function now shows the 'Quantity on RMA' if you use Adagio RMA.

### **Maintenance functions**

- Vendor optional fields are defaulted from the Payables or Sundry Vendor by the Generate Purchase Orders from OrderEntry and Inventory functions.

### **Reports**

- Added a summary by Tax Status to the Tax Tracking report.
- Added 'Use Date' option to the Outstanding Receipt Invoice List report. It can be set to 'Doc. Date' or 'Vendor Doc. Date'. By default (and in prior versions), the report uses the date on the Header tab to select documents. You may now use the 'Vendor Doc. Date' option to use the date entered on the Totals tab.

### **Printing purchase orders and the designer**

- Adagio ePrint users can attach a PDF document (such as shipping instructions) when emailing, faxing or printing purchase orders.
- Fields and objects on specifications can now have custom colors, with full control of hue, saturation and luminosity. Colors in the sample data purchase order specifications and purchase order templates in the designer have been updated accordingly.

- Added new spec codes for formatted address from Company Profile:
  - M27..M33 Company address line 1..7 (formatted)
  - M35 Company City
  - M36 Company State/Province
  - M37 Company Country
  - M38 Company City, State/Prov, ZIP/Postal (formatted)
- Added Vendor new spec code::
  - M38 Vendor City, State/Prov, ZIP/Postal (formatted)
- Added new Bill To spec codes for formatted addresses:
  - B12, B15..B16 Bill-to address 5..7 (compressed)
  - B17..B23 Bill-to address 1..7 (formatted)
  - B25 Bill-to City
  - B26 Bill-to State/Province
  - B27 Bill-to Country
  - B24 Bill-to City, State/Prov, ZIP/Postal (formatted)
- Added new Ship To spec codes for formatted addresses:
  - S13, S18..S19 Ship-to address 5..7 (compressed)
  - S20..S26 Ship-to address 1..7 (formatted)
  - S28 Ship-to City
  - S29 Ship-to State/Province
  - S30 Ship-to Country
  - S27 Ship-to City, State/Prov, ZIP/Postal (formatted)
- Added new Document Header spec codes for formatted addresses:
  - E105, E106..E107 Pickup address 5..7 (compressed)
  - E108..E114 Pickup address 1..7 (formatted)
  - E116 Pickup City
  - E117 Pickup State/Province
  - E118 Pickup Country
  - E115 Pickup City, State/Prov, ZIP/Postal (formatted)
- Added new Document Header spec codes for optional fields:
  - E119..E121 Optional Text 1..3 -header
  - E122..E123 Optional Date 1..2 -header
  - E124..E125 Optional Amount 1..2 -header
  - E126..E127 Optional Units 1..2 -header

### **Import / Export**

- Added Import and Export Ship/Bill To Addresses functions.
- Vendor addresses on documents, Pickup, Ship/Bill To, and Sundry Vendor addresses can be imported in formatted format, including dedicated fields for City, State/Prov and Country.
- Optional Fields can be imported and exported for Purchase Orders, Receipts, Quick Receipts and Sundry Vendors.
- The Default import purchase orders and receipts templates have been simplified and use a minimum number of fields.

### **Miscellaneous**

- Adagio ePrint users can view a PDF of purchase orders and any attached documents from the Email Queue.

- Adagio ePrint users can attach additional PDFs and other types of documents to emails in the queue, such as Word or Excel. Attachments are shown in a tree view on the Edit Email Entry dialog. Right-click on the tree to add a document. Default folders for attachments can be specified on the Reports/Specs tab in the Company Profile. These folders are relative to the ePrint relative folder path (or to the data folder if ePrint is not installed).
- The Data Integrity Check (DIC) saves results for the last 9 previous runs in files IRWINERR01...09.dat (where .dat is your company data file extension). The current DIC information will always be in IRWINERR. If you do check/rebuild/check without closing the DIC function the results are appended to the same file.
- Styles and grid banding are supported when searching by Item Description when entering details on documents.

## Problems Fixed

- Approving a Requisition with Event Budgets, line discounts and manual proration, when interfaced with Adagio JobCost, caused data integrity errors.
- Adding a Receipt to a Purchase Order with Event Budgets and manual proration, when interfaced with Adagio JobCost, caused data integrity errors.
- In some cases when using 4-decimal costing there was a difference in rounding between the purchase order and the receipt, which caused in integrity error in Payables related to the Outstanding PO Amount in the vendor.
- When importing items from an OE order and creating a ShipTo address from the OE order, the ShipTo address is brought into the PO from the OE customer's order and the BillTo address from the Company Profile. However, the Company Name was taken from the BillTo rather than the Company Profile.
- You can load the 4 Additional Information fields from an item to the details of a purchase order by right-clicking on the item, selecting 'Additional Item Info'. However, if the first line field was blank in the item the fields were not loaded.
- If you edited, then deleted and re-added a Miscellaneous Charge on an Invoice / Adjustment, the tax was double allocated.
- If you edited and then deleted a Miscellaneous Charge on an Invoice / Adjustment, the tax that would have been allocated for it was not removed. This caused a write-off when the document was posted.
- If you received the quantity backordered, the program sets that field to zero, then accidentally set it back to the original quantity backordered or more, posting the receipt caused a data integrity error. This is now prevented.
- Posting a receipt without any details caused a data integrity error in some cases. You can no longer post a receipt without any details. There must be quantities received or a non-zero miscellaneous charge.
- Sundry Items now respect the 'Decimal places in unit cost' setting on the Entry Defaults tab in the Company Profile and can be costed up to 6 decimals. In previous versions, the unit cost on the Sundry Item was rounded to 2 decimals.
- The F5 key did not open the finder in the Edit / View Sundry Items, Sundry Vendors, Miscellaneous Charges or ShipTo Addresses functions.

- In PurchaseOrders 9.2A, support for .GIF image file types was lost in the Edit and View Item. A .GIF file could not be selected from the browse and editing or viewing an item with a .GIF image entered in a previous version resulted in an error.
- When the Send Method for a vendor's PO Print Options was set to Email and/or Fax but not Print, you could not preview a purchase order and the message "Nothing to print." was displayed.
- If you email a purchase order from the email queue when the document is no longer in current but is in history, the fields are now read from history. If the document is not in current or history the email can still be sent and the warning "Original document not found. Unable to expand coversheet" is displayed.
- The Pickup Contact (E37) and Pickup Comment (E35) did not print on purchase orders or receipts unless you clicked the 'Pick-up Details' button to open the Edit Pick-up Addresses dialog and clicked the 'OK' button.
- In PurchaseOrders 9.2A, the Document Value was always 0.00 on the Day End Audit List for receipts and adjustments.
- In PurchaseOrders 9.2A, the detail line with Job, Event Code, GL acct/dept, Tax to item, and Qty were missing on the Day End Audit List in some cases.
- If the Outstanding Receipt Invoice List was printed from a Report Set used in an automation job and if no invoices were selected based on the settings and ranges used, this halted the automation job with the message "Selection error".
- If the PO Documents List was open when you used the Auto Generate POs from OrderEntry function, the grid was not updated with the generated purchase orders until the function was closed and reopened.
- The Auto Generate POs from Inventory function did not generate the correct quantity for stocked Items with a Maximum Level of zero in the Reorder Data.
- The Import Purchase Orders function no longer validates the Ship Via. When entering a purchase order, you are allowed to enter any information in the Ship Via field.
- The Import Purchase Orders and Import Receipts functions did not respect the 'Decimal places in unit cost' setting in the Company Profile and rounded costs to 2 decimal places.
- When importing Purchase Orders, Receipts or Quick Receipts in source currency for multi-currency databases, the Total Cost was not converted to home currency.
- The Bill To and Ship To Comment fields were not available in Email Cover Sheets.

## 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 PurchaseOrders 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 PurchaseOrders 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 PurchaseOrders 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 PurchaseOrders is installed on a network, you may also need to do a workstation install at each station running Adagio PurchaseOrders.

To determine if a workstation install is required, start Adagio PurchaseOrders 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.

**Installing PurchaseOrders 9.2B may cause a workstation install to be required for other Adagio 9.2A modules on other stations.** When the first such module (or PurchaseOrders) is run, it will trigger the workstation install. One and only one workstation install, for the first module run, will be required on each station.

**When installing Adagio at a new site, Adagio PurchaseOrders 9.2B should be installed last** (any Adagio 9.2A or 9.2B module with a release date later than December 15, 2015 can be installed last instead), or you must run the All Workstation install on all stations. Otherwise you may not be able to print any reports from Adagio 9.2A modules on other workstations and will receive the error “Logon failed. Details: [Database Vendor Code: 160]”. If this occurs, run the All Workstation install and update the module that had the error. At the same time you may want to update any other modules that will be used on the station. Refer to “Installing on a Network” in the Readme for instructions to run the All Workstation install.

**Adagio PurchaseOrders requires Adagio Payables** and a Payables database must exist for PurchaseOrders to run.

**PurchaseOrders 9.2B requires some Adagio modules to be at a certain version or higher.** See compatibility information below or the Adagio Compatibility Chart.

PurchaseOrders 9.2B requires Adagio Lanpak (if used) to be version 9.2B or higher.

PurchaseOrders 9.2B requires these modules (if used) be at the specified version or higher. If an earlier version of Ledger data is detected, an error message is displayed and PurchaseOrders will not open the database.

- Inventory 8.1E or higher
- JobCost 8.1B or higher
- Ledger 9.0C or higher
- OrderEntry 8.1D or higher, 9.2A (2016.01.11) or higher preferred
- Payables 8.1E or higher

**Transactions for PurchaseOrders 9.2B are not available in the Edit / View Vendor functions in Payables or BankRec.** These transactions can be viewed in the Edit / View

Vendor functions in PurchaseOrders. Future releases of Payables and BankRec will allow these transactions to be viewed.

**Details from documents in PurchaseOrders 9.2B do not display correctly in the Item Inquiry with Sales and Costs function** in Adagio Inventory, Invoices, SalesCQ or SalesAnalysis. This display issue will be addressed in the next Service Packs for these modules. In the interim, please use the item display in Adagio PurchaseOrders or Adagio OrderEntry 9.2A (2016.01.11) or higher.

These transactions can be viewed in the Edit / View Vendor functions in PurchaseOrders. Future releases of Payables and BankRec will allow these transactions to be viewed.

The Auto Generate POs from OrderEntry function did not work if you have OrderEntry 9.2A (2015.07.29). Orders entered with this version of OE 9.2A did not generate PO's. Orders entered with a previous version of OE and orders created by transfer from SalesCQ did not have a problem. This was corrected in OrderEntry 9.2A (2016.01.11). If you entered orders in the 9.2A (2015.07.29) version, you must open the data with PurchaseOrders first and then do a Data Integrity Check in OE. Errors will be reported for each detail line entered in OE 9.2A (2015.07.29). You must do a rebuild and all errors will be corrected without loss of data. The Auto Generate will then work correctly.

PurchaseOrders 9.2B requires Adagio MultiCurrency (if used) to be version 9.2A or higher.

**The data structure for PurchaseOrders 9.2B was changed and expanded significantly.** Programs from Adagio Developer Partners (ADPs) that read or write the PurchaseOrders 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 PurchaseOrders 9.2B.

PurchaseOrders does not have a Manual in PDF form. Use the online help instead. The help fully documents all aspects of the product.

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

PurchaseOrders 9.2B requires a significant database conversion from earlier versions. You should perform a Data Integrity Check in your current version of PurchaseOrders 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 and/or views for PurchaseOrders created in Crystal Reports 8.5 for Adagio / Adagio GridView, they will require conversion and adjustment for use with 9.2B. You should not install the upgrade or convert PurchaseOrders 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 9.2A**

**Upgrade Complexity:**

**Difficult** ◆

## **Installing the upgrade:**

Adagio PurchaseOrders 9.2B is a major upgrade, containing many changes and new features. It is very important to review the information below before installing the upgrade.

PurchaseOrders 9.2B 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 PurchaseOrders 9.2B until you are certain you have all the compatibility releases required at your site available to be installed.

**The data structure for PurchaseOrders 9.2B was changed and expanded significantly.** Programs from Adagio Developer Partners (ADPs) that read or write the PurchaseOrders 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 PurchaseOrders 9.2B.

## **Converting your database:**

Adagio PurchaseOrders 9.2B requires a significant database conversion from 9.2A.

You can convert your PurchaseOrders database at any time. To start the conversion, open your current database for the first time in PurchaseOrders 9.2B. 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.

The conversion should only take a few minutes. However, it could take a significant period of time on databases with a large number of purchase orders 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 dealer or consultant for assistance with this procedure.

Adagio PurchaseOrders 9.2B 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 Payables, which requires Payables 9.2A or higher.

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 vendors 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 purchase order specifications will continue to work without adjustment whether or not you elected to format addresses.

However, you may want to adjust or create new specifications to use the new formatted address specification codes:

- Company Address M27 – M33
- Vendor Address V52 – V58
- Bill to Address B17 – B23
- Ship to Address S20 – S26
- Pickup Address E108 - E114

The length of some fields have been increased for 9.2B. You may need to adjust the field size on specifications accordingly. For example:

- E015 FOB Point is now 40 characters
- E045 –E046 Comment Lines are now 40 characters instead of 30
- E047 PO Description is now 40 characters instead of 30.

Sample data purchase order specifications and purchase order templates in the designer have been updated to use formatted addresses fields.

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 purchase orders for vendors in your own country.

The Default import purchase orders and receipts templates have been simplified and use a minimum number of fields. Existing templates are converted. The 9.2A default purchase order template is not deleted, but rather converted and renamed to 'Purchase Orders 92A Default'. Sites upgrading to 9.2B who used the default import templates should not have to change the structure of an import file that was working in 9.2A or create a new template identical to the old template. The 'Auto-import on startup' option may need to be set for the converted template. The field lengths for the converted template have been updated to reflect the new length for Comment fields (40), Description fields (40) and Contact (30).

## **Converting Modified and Custom Reports:**

If you have modified any of the standard reports installed by Adagio PurchaseOrders you will have to redo those modifications for PurchaseOrders 9.2B. Any modified reports will be located in \Softrak\PurchaseOrders\ModifiedReports. These same reports must be recopied from \Softrak\PurchaseOrders\StandardReports and re-modified using Crystal Reports 2011 or 2013. Adagio ODBC must be installed to be able to do this.

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

A Report Converter Utility is available from Softrak Systems for the purpose of converting custom reports created with Crystal Reports 2011 or 2013 for PurchaseOrders 9.2A to work with 9.2B. 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.

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 PurchaseOrders 9.2B dictionary. The DDE program, help and manual can be run from the Windows Start menu.

The 9.2B data dictionaries contain 2 tables for each physical file - one for use by the Adagio module and one for use by reports in 9.2B 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" (e.g. au92bhedcrview). Standard tables do not end with "crview" (e.g. au92bhed). 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. "PO").

Note: When PurchaseOrders 9.2B has been installed, or a new version of any Adagio module with reports that has a release date in March 2016 or later, the Report Convertor will no longer convert reports from 8.1B/C/D versions to 9.2A. Such reports can only be converted to 9.2B.

### **Converting GridView Views**

A data dictionary change from 'Adagio Purchase Orders 9.2A' (@U92A) to ' Adagio Purchase Orders 9.2B ' (@U92B) was required in order to support new features added for this version. GridView views created for earlier versions of Adagio PurchaseOrders must be recreated using tables from 'Adagio Purchase Orders 9.2B'. GridView has the ability to convert existing views to a new table.

Note: The 9.2B 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 "P/O or PO" and ones for use by its reports do not. When creating new views you must use the tables starting with "P/O or PO". A future release of GridView will hide tables used by the reports so they cannot be used inadvertently. Tables starting with "PO" (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 PurchaseOrders 9.2B 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>.

### **Upgrading from 8.1D**

### **Upgrade Complexity:**

**Difficult** ♦

Adagio PurchaseOrders 9.2B requires a significant database conversion from 8.1D or 8.1C. If converting from 8.1C, also see section below entitled 'Updating from 8.1C'.

You can convert your PurchaseOrders database at any time. To start the conversion, open your current database for the first time in PurchaseOrders 9.2B. 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 9.2B, it cannot be used with earlier versions.

Adagio 9.2A uses a newer 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 9.2B 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. If other 9.2A or 9.2B modules have already been installed these packages will not need to be downloaded. Adagio ODBC drivers are installed by these modules – the Adagio ODBC module 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 PurchaseOrders 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\PurchaseOrders\CustomReports. The Report Tables Drive settings and Crystal tables in the \QRASP folder are no longer used.

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 9.2B. 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 Purchase Orders 8.1C-8.1D' (@U81C) to ' Adagio Purchase Orders 9.2B ' (@U92B) was required in order to support new features added for this version. GridView views created for earlier versions of Adagio PurchaseOrders must be recreated using tables from 'Adagio Purchase Orders 9.2B'. GridView has the ability to convert existing views to a new table.

Note: The 9.2B 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 "P/O or PO" and ones for use by its reports do not. When creating new views you must use the tables starting with "P/O or PO". A future release of GridView will hide tables used by the reports so they cannot be used inadvertently. Tables starting with "PO" (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 PurchaseOrders 9.2B 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 PurchaseOrders, you will have to redo those modifications for PurchaseOrders 9.2B. Modified reports are files with an .rpt extension that you copied from \Softrak\PurchaseOrders\StandardRP to \Softrak\PurchaseOrders\ModRP and modified using Crystal Reports 8.5 for Adagio. Your modified reports from your prior version will be copied to the folder \Softrak\PurchaseOrders\ModifiedReports.priorversion. These same reports must be recopied from \Softrak\PurchaseOrders\StandardReports to \Softrak\PurchaseOrders\ModifiedReports and re-modified using Crystal Reports 2011 or 2013. The Adagio ODBC 9.1A or higher module must be installed to be able to do this.

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

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

A Report Converter Utility is available from Softrak Systems for the purpose of converting Crystal Reports 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. The Adagio ODBC 9.1A or higher module must be installed to be able to do this. **Only reports built using the most recent QRT\*.QRW tables can be converted.**

The Report Converter Utility and related files are installed to \Softrak\System\ReportConverter. It converts reports created with Crystal Reports 8.5. See Tech-Tips on the ReportConverter and Speed Improvement Tips for Custom Reports in this folder.

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 Converter. 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. Note: Softrak no longer provides support for Crystal Reports 8.5 for Adagio.

As Adagio 9.2A and higher 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 PurchaseOrders 9.2B dictionary. The DDE program, help and manual can be run from the Windows Start menu.

The 9.2B data dictionaries contain 2 tables for each physical file - one for use by the Adagio module and one for use by reports in 9.2B 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" (e.g. au92bhedcrview). Standard tables do not end with "crview" (e.g. au92bhed). 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. "PO").

When you are certain the original reports are no longer needed, you can delete the \Softrak\PurchaseOrders\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 9.2B.

### **Updating from 8.1C**

### **Upgrade Complexity:**

**Difficult** ♦

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.

The Data Integrity Check (DIC) now checks for details on purchase orders where the Qty Ordered \* Unit Cost doesn't equal Extended Cost. This check was not done in PO8.1C. Therefore errors, while rare, may be reported by the DIC after upgrading. The errors were likely created in POA. The DIC cannot rebuild these errors because it has no way of knowing which value to correct. To correct these errors, you must edit the details on the purchase orders and manually correct the appropriate field as needed.

If errors are encountered when converting to 9.2B from 8.1C, you should convert to 8.1D first and then to 9.2B. Contact your Adagio dealer or consultant.

