

Adagio® SalesAnalysis 9.0B (2011.11.14)

Release Notes

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



Upgrade Complexity

From prior version: **Easy** ●

Adagio

Crystal Reports® 8.5-B for Adagio
DataCare 8.1A, 9.0A
ePrint 9.0A
GridView 6.8A – 9.0D
Inventory 8.1C (Note 1)
Invoices 6.8A – 8.1B, 9.0B
Lanpak 9.0D
MultiCurrency 8.1B
ODBC 9.0A

OrderEntry 8.1 D (Note 1)
Receivables 6.8A – 9.0B

Other

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

Enhancements and revisions in Adagio SalesAnalysis 9.0B (2011.11.14)

New Features

- ◆ Installs the AdagioPDF printer driver. All reports and printouts from Adagio can be printed to the AdagioPDF printer to create a PDF document in the data folder.
- ◆ Supports the features in Adagio ePrint. When ePrint is installed you can print reports to PDF files in configurable folders determined by the Report Type (General or Transaction). Fields can be embedded to establish the file and folder names (User, Session Date, System Date, Time). Click the ePrint button (red "EP" icon) on any report dialog to print the report to PDF. The Paperless Reports option forces all reports to be printed to PDF. Reports can be printed to PDF and attached to an email (MAPI) with a single button click.
- ◆ Report Favorites allow saving Reports with specific options chosen. Click the Favorite button (a star icon) on any report dialog to create a Favorite. Favorites for a report can be accessed from the report dialog in a drop-down field. Private Favorites are yellow, Public Favorites are blue. Added Favorite Reports and Print/Delete Favorites functions to the Reports menu. Multiple favorites can be defined for the same report. Favorites can be private to the Adagio user or public for use by all users.
- ◆ Report Sets allow the grouping of Report Favorites and Online Inquiry summary and detail reports into a single print job that will run unattended. Report Sets may be printed to printer or PDF files. Report Sets may be launched from a command file or a scheduled Windows task by running SalesAnalysis.exe with the parameter /R followed by the Report Set (ex. /RMonEnd). A progress dialog lists the reports in the Report Set, the printing status of each, the destination folder, filename and conflict strategy. A log is generated that records the printing status of each report in the set. Use Report Sets to automate the printing of all your daily or month end reports.
- ◆ On the Open database dialog you can now use Alt-B to open the browse and Alt-F (for Favorites) to open the previously opened list. In previous versions you had to use the mouse to select the folder buttons.
- ◆ Alt-X now selects the Excel Direct button on grids where it is available. In previous versions you had to use the mouse to select Excel Direct.
- ◆ You can now exceed the 168 character limit in an Online Inquiry when it is being used to ExcelDirect the results, as there is no width limit in Excel. A warning is issued you try to print a report and the fields will wrap to an extra line.
- ◆ The vitalEsafe upload progress dialog has been improved and the progress bar now accurately shows the percentage. It is no longer necessary to install the vitalEsafe patch.

Problems Fixed

- ◆ The Retrieve Sales Data and Scan Sales Data functions in SalesAnalysis 9.0A trimmed leading spaces from the Item Number of multi-segment items. There was no problem for items that did not have a space as the first character of the Item Number.
- ◆ The Online Inquiry report bar charts had incorrect values for Territory.
- ◆ In SalesAnalysis 9.0A, the Item Description showed as asterisks in the On-line Inquiry summary when it should not have if the 'Use desc from SRTRANS' option was on in the Company Profile. In 9.0B, the Item Description from the 1st transaction detail for this item

is displayed in the summarized view.

- ◆ In the Edit Sales Data function in SalesAnalysis 9.0A, if you changed a record and clicked the Next button instead of the OK button, after receiving the prompt asking if you wanted to save the changes an error message was displayed and the next record was deleted.
- ◆ There was a problem in SalesAnalysis 9.0A sending data to Excel Direct. After, if Pivot Tables in Excel 2007 or 2010 were used to summarize, the resulting values displayed as a '1'.
- ◆ If you exported more the 65,535 transactions to an Excel file the progress bar displayed a percent higher than 100, although if you exported to a .xlsx the file was complete (.xls files for Excel 2003 and earlier are limited to 65,535 rows in any case).
- ◆ When converting data to 9.0A the message "Error adding record to Adagio Sales Analysis 9.0 Transactions, record already exists." was encountered in rare cases where transactions had a blank dates from some earlier problem with the database. The conversion now handles and corrects these bad records.
- ◆ For filters based on a range of a right-justified field (such as customer number, single segment item number, etc.), additional records were selected that should not have been. For example, if the range is from 1 to 2, then not only would records 1 and 2 be selected, but also 10, 11, 100, 101 etc. You will need to edit and save any such existing filters to correct them.
- ◆ The Find did not work correctly for selecting a customer with a leading zero in the Name field, such as for a numbered company.
- ◆ SalesAnalysis displayed the error "2018 Error field number invalid" in some cases when you started the program if you use Adagio Invoices 9.0A but do not have Adagio Inventory installed.
- ◆ When installing Adagio to a computer or server where no Adagio modules had previously been installed, if you installed an Adagio module that does not use the Crystal print engine first (such as Lanpak or GridView), when you installed SalesAnalysis you received the error "Adagio has been established on destination folder: [x:\SOFTRAK]. Yet the install cannot detect the corresponding Reports Tables..." and were unable to proceed. If the first module installed uses the Crystal print engine there was no problem.
- ◆ The updated version of vitalEsafe no longer triggers a workstation install if it has already been installed by the workstation install for another Adagio module. This is also the case when installing Adagio for use with Remote Desktop Services (Terminal Services in Windows Server 2008 and previous versions).
- ◆ When running any Adagio module that installs vitalEsafe (or WebSafe as it was previously known as) on a Windows 7 (or Vista) station, in some cases the auto-workstation install ran every time you started the application, even if you had done a workstation install. This happened if the user was not an Administrator on their own machine (the default for a new computer) but rather a Standard user, and User Account Control (UAC) was on, and you had not installed any module with a release date of October 2011 or later and done a workstation install for it on the station. This has been resolved. To resolve this problem for ALL other modules, install any module with a release date of October 2011 or later and do a workstation install for it on the station.

Enhancements and revisions in earlier versions of Adagio SalesAnalysis

- ◆ 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 SalesAnalysis 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 upgrade download instruction email. A previous version of Adagio SalesAnalysis 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 your previous version.

Read the sections below before installing an upgrade from an earlier version.

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 SalesAnalysis 9.0A must be installed before the Service Pack can be installed.

To install Adagio SalesAnalysis (or an upgrade) run the program file you downloaded. Once the install program is running you can click the View button for detailed instructions. If Adagio SalesAnalysis is installed on a network, you must also do a workstation install for each workstation running Adagio SalesAnalysis. Refer to the manual or "Installing on a network" in the Readme help for instructions.

To install the Adagio SalesAnalysis 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 SalesAnalysis. To determine if a workstation install is required, start Adagio SalesAnalysis at the workstation. The workstation install will be automatically started if required. Note: If you are updating multiple applications at the same time, it may be faster to run the all workstation install to update all

applications at once on the station. Refer to "Installing on a Network" in the Readme for instructions.

Upgrading to 9.0B from 9.0A

Upgrade Complexity: **Easy** ●

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

Adagio SalesAnalysis requires Adagio MultiCurrency 8.1B or higher when used with a multi-currency database.

There are no other special considerations when upgrading to Adagio SalesAnalysis 9.0B from version 9.0A and no database conversion is required. The information below can be skipped.

Upgrading to 9.0B from versions earlier than 9.0A

Upgrade Complexity: **Difficult** ◆

Adagio SalesAnalysis 9.0A was a major upgrade, containing many changes and new features. **If you are upgrading to 9.0B from a version earlier than 9.0A it is very important to review the information below regarding 9.0A before installing the upgrade.**

Upgrading to this Version – considerations before installing an upgrade

Adagio SalesAnalysis 9.0A is a major upgrade with significant changes to the data structure, containing many changes and new features. It is very important to review the information below before installing an upgrade.

Note 1: Adagio SalesAnalysis 9.0A requires compatibility upgrades and Service Packs to several other Adagio modules. **Do not install SalesAnalysis 9.0A until** you are certain all the compatibility upgrades required at your site have been released by Softrak and you have them available to install.

Adagio SalesAnalysis 9.0A requires Adagio OrderEntry to be version 8.1D (2011.03.16) or higher. The installation of OE and SA, and the conversion of data, can be done in any order. However, you should open SA 9.0A at least once after converting OE data, before running Day End in OE. If this is not done, you will receive a series of messages when you open SA, prompting you to retrieve transactions from OE before the database can be opened. If you are also converting OE from earlier versions than 8.1D you may also get these messages. No data will be lost in any case.

An Item Description field was added to transactions. The conversion to 9.0A sets it to item description saved in the SA Item Description File the last time the item was on a document retrieved into SA. If there is no description in that file the converted data will have a blank item description. This may be the case for transactions that were retrieved by older versions of SA. To avoid this possibility you should run the Update Item Description File function prior to installing the 9.0A upgrade.

SalesAnalysis 9.0A requires Adagio Inventory to be version 8.1C or higher.

SalesAnalysis 9.0A requires Adagio SalesCQ to be version 8.1B (2011.03.18) or higher.

SalesAnalysis 9.0A requires Adagio Invoices to be version 9.0A (2010.03.17) or higher if you use Invoices 9.0A. SA 9.0A is compatible with 8.1B and earlier versions of Invoices when Receivables 8.1A or earlier is used.

SalesAnalysis 9.0A requires a database conversion. You should perform a Data Integrity Check in your current version of SA 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.

Adagio SalesAnalysis is one of the top modules for which custom reports and views are likely to have been created in Crystal Reports for Adagio and Adagio GridView. These reports and views will require conversion and adjustment for use with 9.0A. You should not install or convert SA until you have a plan in place to update any custom reports and views critical to your operation. See the 'Converting custom reports and views' section below for details.

Upgrading to this Version – installing the upgrade

Adagio SalesAnalysis 9.0A will be installed to the \sofrak\salesanalysis folder. Previous versions were installed in \sofrak\srwin. The previous version will be uninstalled. Uninstalling the previous version removes everything from the program folder that got installed but leaves everything else that you may have created manually, including the CustomRP, ModRP and Views folders.

The install checks that you have the required versions (as listed in the section above) and displays a warning if the version you have is not compatible. You may proceed as long as you have the required compatibility upgrades to the other modules and are prepared to install them after completing the installation of SalesAnalysis 9.0A.

The upgrade install cannot change any custom icons you may have created to launch SalesAnalysis and they will continue to run your previous version if it was not uninstalled or will display a "missing shortcut" error if it was uninstalled. You must change these icons manually to run SalesAnalysis from \sofrak\salesanalysis\salesanalysis.exe.

Upgrading to this Version – converting your database

You can convert your SA database at any time. You do not need to retrieve from OrderEntry or Invoices first. You do not have to run Day End in OrderEntry or print and clear the audit lists before converting your data.

To start the conversion, open your current database that used your previous version of SA. A warning is displayed indicating the database will be converted and a backup must be made. The program allows you to make a back up at this time, before proceeding with the conversion.

The conversion to 9.0A could take a significant period of time on databases with a large number of transactions 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 will be much faster. We strongly recommend you contact your Adagio dealer or consultant for assistance with this procedure.

Note: If the conversion is aborted or does not complete for any reason you must restore your backup. Before restoring your backup you **MUST** first delete the SA data files (SR*.ddd, where ddd is your company data file extension). Failure to delete the SA data files before restoring your backup will result in future problems and database corruption. In general you must always delete the existing database before restoring a backup and be certain your backup is viable before deleting the database.

Upgrading to this Version – after conversion

The program folder moves to \sofrak\salesanalysis for version 9.0A. Previous versions were installed to \sofrak\srwin. Likewise, the program filename changes to SalesAnalysis.exe for version 9.0A. Previous program versions were named srwin.exe.

The Windows Start list entry for version 9.0A will default to 'SalesAnalysis 9'. The Windows Start list entry for earlier versions defaulted to 'SalesAnalysis', and will be removed. When installing an upgrade you should change any icons on your desktop or in desktop folders to run SalesAnalysis using the new program name and folder (see above paragraph).

Settings made in the Column Editor to grids, finders and smart finders for previous versions may be adjusted.

The File | Options, Field Verification option has been removed. Fields are always verified during entry.

Statistics Field Selection is now on a new tab in User Preferences. In previous versions the selection was done in security Groups.

The Original Invoice field from credit notes was added to the transaction file. The conversion sets this new field to blank for existing transactions. It is possible to use the Scan Sales Data function to populate this field for existing transactions. However, this function does not update existing records but only adds new records. Therefore you would have to delete or archive all transactions and then scan to get them back. You must be certain your OrderEntry and/or Invoices history contain ALL the transactions you require in SA. Therefore this procedure is not recommended unless the Original Invoice field is very important to you.

Upgrading to this Version – converting custom reports and views

Reports

If you have modified any of the standard reports installed by Adagio SalesAnalysis, you will have to redo those modifications for SalesAnalysis 9.0A. Modified reports are files with an .rpt extension that you copied from \sofrak\srwin\StandardRP to \sofrak\srwin\ModRP and modified using Crystal Reports for Adagio. The standard report filenames for 9.0A are similar to those in earlier versions. Your modified reports from your prior version will be copied to the folder \sofrak\salesanalysis\ModRP.priorversion. Re-modified reports must be placed in \sofrak\salesanalysis\ModRP for SalesAnalysis 9.0A.

Installing a SalesAnalysis 9.0A upgrade does not delete your original modified reports in \sofrak\srwin\ModRP. When you are certain these reports are no longer needed, you can delete that folder.

Custom reports created in Crystal Reports for Adagio for earlier versions of SalesAnalysis will have to be modified or recreated for use with SalesAnalysis 9.0A databases. Your custom reports from your prior version will be copied to the folder \sofrak\salesanalysis\CustomRP.priorversion. Recreated custom reports must be placed in \sofrak\salesanalysis\CustomRP for SalesAnalysis 9.0A. Installing a SalesAnalysis 9.0A upgrade does not delete your original custom reports in \sofrak\srwin\CustomRP. When you are certain these reports are no longer needed, you can delete that folder.

See the Tech Note entitled "Converting Crystal Reports for Adagio SalesAnalysis 9.0A" and a on Softrak's website under Support | Technical Tips <http://www.softrak.com/partners/resources/technicaltips/technicaltips.php>. In addition to this document there is short video entitled "ConvertingReportsforSR90A" showing how to convert a report.

The 'Installed only' method of selecting tables for Adagio when defining reports in Crystal Reports for Adagio using ADAGIO.SSI to find your database is not supported for SalesAnalysis 9.0A. Find your database by the alternate method of searching for the SalesAnalysis company profile (global) file 'SRGLOB' instead. Existing reports are not affected by this change.

Views

GridView views created for earlier versions of Adagio SalesAnalysis must be modified or recreated or using tables from 'Adagio

SalesAnalysis 9.0A'. GridView 9.0A and higher has the ability to convert existing views to a new table.

Views from your prior version will be copied to the folder \sofrak\salesanalysis\views.priorversion. Recreated views must be placed in \sofrak\salesanalysis\views for SalesAnalysis 9.0A. Installing a SalesAnalysis 9.0A upgrade does not delete your original views in \sofrak\crwin\views. When you are certain these views are no longer needed, you can delete that folder.

See the Tech Note entitled "Converting GridView views for Adagio SalesAnalysis 9.0A" on Softrak's website under Support | Technical Tips <http://www.softrak.com/partners/resources/technicaltips/technicaltips.php>. In addition to this document there is short video entitled "ConvertingViewsforSR90A" showing how to convert a view.

You may find the Adagio Data Dictionary Export Tool useful for comparing tables in the Adagio SalesAnalysis 9.0A dictionary to previous versions using Excel. The exporter can be found under on Softrak's website Support | Technical Tips www.softrak.com/resources/technicaltips/technicaltips.php.

A new Composite dictionary "Adagio {Composite Tables 9.0B}" that links to SalesAnalysis 9.0A tables is installed for use with GridView. It replaces "Adagio {Composite Tables 9.0A}" for use with SalesAnalysis 9.0A. Views using the 9.0A composite dictionary can be converted to use the new 9.0B dictionary. However, if you have GridView 9.0C or higher, instead, we recommend you redefine your views using the new call GetExternalData(S, S, list), and the composite dictionary will not be needed. See the GV 9.0C documentation for details. Note: the composite dictionary will not be updated for future upgrades of Adagio modules because GV 9.0C allows you to create your own composite views using any related tables.

Upgrading to from a version older than 8.1B

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

Settings remembered from the last use of the Set Paid Invoices and Statistics Inquiry functions are lost when you convert and must be re-selected the first time these functions are used after the conversion.

-- end --