



Compatibility

Adagio

Console 9.1A
DataCare 9.1A
ePrint 9.0A
GridView 8.1A - 9.2A
Inventory 8.1C - 9.2A
Invoices 8.1A - 9.2A
Lanpak 9.2A
MultiCurrency 9.2A
ODBC 9.0A, 9.1A
OrderEntry 8.1D - 8.1F
Receivables 9.0A - 9.2A

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 Upgrading section)

Note

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

Enhancements in SalesAnalysis

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 SalesAnalysis logs user activity within the module, including login, menu choices and batch New, Edit, Copy, Delete and Post. Audit logs may be viewed with GridView.
- The View Customer and View IC Item 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.

- The Column Editor screen can be sized. The size is remembered by module on the workstation.
- Updated splash screen with new Adagio logo and colors. Updated icon and toolbar button images.

Receivables Interface

- Supports enhancements and new options in customers added in Receivables 9.2A.

Reports

- Adagio SalesAnalysis 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\SalesAnalysis\StandardReports. Revisions to these reports should be placed in \Softrak\SalesAnalysis\ModifiedReports. Custom reports to be added to the Reports menu should be stored in \Softrak\SalesAnalysis\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. The Report Tables Drive settings and Crystal tables in the \QRASP folder are not used by version 9.2A modules.

- 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. It 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. 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. 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.

Miscellaneous

- The Data Integrity Check (DIC) saves results for the last 9 previous runs in files SRWINERR01..09.dat (where .dat is your company data file extension). The current DIC information will always be in SRWINERR. If you do check/rebuild/check without closing the DIC function the results are appended to the same file.
- Import and export templates created for Excel format now default the file extension to .XLSX rather than .XLS.

Problems Fixed

- Auto-Start Chart did not respect the Running Total option if 'Refresh on Open' was enabled.
- The Import Transactions no longer requires a customer number.
- The Find by Customer Phone did not show formatted phone numbers.
- You could not open Transactions for the Edit Data Finder if the Invoices item did not use 6 characters. The same problem existed for single segment IC items.
- Scan Sales Data for Adagio OrderEntry doubled tax lines for invoices.
- IC Item Styles were not supported in finders for items by Item Description.
- When starting Adagio 9.2A versions, the Crystal Reports Runtime (used to print reports) intermittently displayed an error such as "The program can't start because TraceLog-4-0.dll is missing from your computer." when in fact the DLL file was present and reports did print without problem. Installing SalesAnalysis 9.2A should correct this for all 9.2A modules.

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 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 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 a previous version.

Read the section ‘Upgrading’ sections below before installing an upgrade.

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 installation instructions in the Readme help. If Adagio SalesAnalysis is installed on a network, you may also need to do a workstation install 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.

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

SalesAnalysis 9.2A requires Adagio Lanpak (if used) to be version 9.2A or higher.

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

SalesAnalysis 9.2A requires Adagio Receivables 9.0A or higher.

SalesAnalysis 9.2A requires Adagio DataCare 9.1A or higher.

SalesAnalysis 9.2A **requires Microsoft Server 2008 R2 SP1** or higher if running under Remote Desktop Services (Terminal Services). SalesAnalysis 9.2A may be installed to Server 2003 and 2008 R1 when used as a file server from a station on a LAN.

SalesAnalysis 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 SalesAnalysis 9.2A requires a minor database conversion from earlier versions. You should perform a Data Integrity Check in your current version of SalesAnalysis 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 SalesAnalysis 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 SalesAnalysis 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 9.0A, 9.0B or 9.1A

Upgrade Complexity: Intermediate ■

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

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

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. If other 9.2A modules have already been installed, these packages will not need to be downloaded. Adagio ODBC drivers are installed by version 9.2A applications – 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 SalesAnalysis 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\SalesAnalysis\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 older versions to 'Adagio SalesAnalysis 9.2A' (@I92A) was required in order to support new features added for this version. GridView views created for earlier versions of SalesAnalysis should be recreated using tables from 'Adagio SalesAnalysis 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 "S/R or SR" and ones for use by its reports do not. When creating new views you must use the tables starting with "S/R or SR". A future release of GridView will hide tables used

by the reports so they cannot be used inadvertently. Tables starting with "SR" (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 dictionary.

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 (DDE) useful for comparing tables in the Adagio SalesAnalysis 9.2A dictionary to previous versions using Excel. The DDE is installed to \softrak\system and can also be found 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 SalesAnalysis, you will have to redo those modifications for SalesAnalysis 9.2A. Modified reports are files with an .rpt extension that you copied from \Softrak\SalesAnalysis\StandardRP to \Softrak\SalesAnalysis\ModRP and modified using Crystal Reports 8.5 for Adagio. Your modified reports from your prior version will be copied to the folder \Softrak\SalesAnalysis\ModifiedReports.priorversion. These same reports must be recopied from \Softrak\SalesAnalysis\StandardReports to \Softrak\SalesAnalysis\ModifiedReports and remodified using Crystal Reports 2011 or 2013. The Adagio ODBC 9.1A or higher module 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\SalesAnalysis\ModifiedReports.priorversion folder.

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

A Report Convertor 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. Or your Adagio dealer or consultant can convert your custom reports for you and deploy them at your site.

Note: Custom reports created with Crystal Reports 8.5 for Adagio for prior versions of SalesAnalysis 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 SalesAnalysis 9.2A did not change significantly. Existing custom reports cannot be printed from the Custom Reports menu of SalesAnalysis 9.2A and may not function for future versions of SalesAnalysis.

The Report Convertor Utility and related files are installed to \Softrak\System\ReportConvertor. It converts reports created with Crystal Reports 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 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 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 SalesAnalysis 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" (e.g. as92atrncrview for the history header). Standard tables do not end with "crview" (e.g. asr92atrnrn). 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. "AR").

When you are certain the original reports are no longer needed, you can delete the \Softrak\SalesAnalysis\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 versions earlier than 9.0A

Upgrade Complexity: **Difficult** ♦

Adagio SalesAnalysis 9.0A was a major upgrade, containing many changes and new features. This Release Notes does not cover upgrading from earlier versions. **If you are upgrading to 9.2A from a version earlier than 9.0A, before installing the upgrade, it is very important to review this information in the 9.1A (2014.10.21) Release Notes on Softrak's website.** The Readme help also contains this information.

