# Adagio® SalesAnalysis 9.2A (2017.09.04)

Upgrade Complexity from 9.1A  **Intermediate** ■

**Release Notes**

## Compatibility

### Adagio

Console 9.1A – 9.2B
DataCare 9.1A, 9.2A
ePrint 9.0A, 9.2A
GridView 8.1A - 9.2B
Inventory 8.1C – 9.2A
Invoices 8.1A – 9.2A
Lanpak 9.2A – 9.3A
MultiCurrency 9.2A, 9.2B
ODBC 9.1A, 9.2A
OrderEntry 8.1D – 9.2A
Receivables 9.0A – 9.2A

### Other

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

- Compatible with and required by future release of OrderEntry 9.3A.

- Supports new option in future OrderEntry 9.3A release to send Standard Cost rather than Actual Cost to SA. This option is also supported in the Scan OrderEntry function.

- Future OrderEntry 9.3A release tracks the Quote Number and Quote Revision in orders transferred from quotes in SalesCQ. These fields are retrieved from OrderEntry and by the Scan OrderEntry function. They can be shown on grids and included on GridView views or custom Crystal reports. They are available in Import/Export templates.

- Added Email Setup function to support Direct email for Adagio Console users, allowing them to use Direct for the EmailPDFLog command in automation batches rather than MAPI, which requires operator input.

- Installs an updated version of the AdagioPDF driver. The updated driver name is AdagioV2PDF and will appear in Windows Control Panel, Devices and Printers. When installs are performed from a Remote Desktop Services connection to Microsoft Server 2016 or from a Windows 10 station, the security warning related to the AdagioPDF printer driver no longer appears.

- The drill-down for several Standard Reports was corrected to sort by Date. Also sorts by Document Number for cases where there were multiple invoices for the same customer on the same date.

- In SalesAnalysis 9.2A (2016.06.08), the performance of certain Standard Reports in 9.2A was has improved. Any of these reports, when printed with a restricted Item Number range but with no other range restrictions, printed the wrong item description for items on the report.

- Corrected an error printing detail reports from Online Inquiry when String Optional Fields where included.

- Dialogs are rendered properly on Ultra High Resolution displays when the font size is anything other than 100% of normal on Windows 8.1 or higher.

## 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.

**Installing SalesAnalysis 9.2A may cause a workstation install to be required for other Adagio 9.2A modules on other stations.** When the first such module (or SalesAnalysis) 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 SalesAnalysis 9.2A** or any Adagio 9.2A or 9.2B module with a release date later than December 15, 2015 **should be installed last**, 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.

**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.

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.

## Note: GridView views / custom reports for OrderEntry 9.3A

SalesAnalysis 9.2A (2017.09.04) and higher is compatible with future release of OrderEntry 9.3A. There is no conversion of SA data whether OE 9.2A or 9.3A is used. Custom Crystal reports and GridView views for OE 9.2A users will not be affected by installing SA 9.2A (2017.09.04) or higher. **However, custom reports and views may need to be adjusted for OE 9.3A.**

In OrderEntry 9.3A, the Miscellaneous Charge Code changes to allow more than 10 codes per Price List. The format changes from "Mis0" to Mis9" to "Mis00000" to "Mis99999". When SalesAnalysis is used with OE 9.3A, the code is retrieved in the new format. The code in existing SA Transactions retrieved from earlier versions of OE is not converted to the new format. Online Inquires, custom Crystal reports and GridView views may need to adjusted. Note: The Miscellaneous Charge Code is retrieved and stored in the Item Number field in SalesAnalysis.

In OrderEntry 9.3A, the Reference field on the order header changes from 12 to 24 characters. The new field 'Reference OE93A' was added to the SA Transaction record to accommodate this. It can be shown on grids and included on GridView views or custom Crystal reports.

Adjustment of existing custom Crystal reports or GridView views using the Reference field may be required when OE 9.3A is used. Custom reports and views for OE 9.2A users will not be affected.

For OE 9.3A users, there is no conversion of SA data. The new Reference OE93A field will be blank in transactions already retrieved from pre-OE 9.3A.

If you will be entering more than 12 characters in the Reference in OE 9.3A, your custom reports and views may need adjusting. You may need a formula to select Reference if Reference OE93A is blank.

If you continue to enter 12 characters or less in the Reference in OE 9.3A, then your reports and views would not need to change because the (old) Reference field (12 characters) in the Transaction is populated with 12 characters from the 24 character Reference field in OE.

The field OE93A Order Key was added to the SA Transaction Master record. It is 13 characters: the Prefix (or Type, C, I, O) of length 1, plus the Order # of length 12. Use this field in custom Crystal reports to link to order header files in OrderEntry 9.3A when the standard tables are used.

For existing reports using the old tables ("crview" tables), the link to OE 9.2A order headers used the field 'OE 8 prefixed doc' to link to the OE header. This link will no longer work if Document Numbers longer than 8 characters are used. Reports must be recreated to use the standard tables. See below for more information.

# 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, 2013 or 2016. 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.

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' (@S92A) 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, 2013 or 2016. 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 2011/2013/2016 format, using the Adagio ODBC driver. Converted reports can be edited and new reports can be created using Crystal Reports. 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. **Only reports built using the most recent QRT*.QRW tables can be converted.**

Note: Custom reports created with Crystal Reports 8.5 for Adagio for prior versions of 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. Custom reports with links to OrderEntry may NOT work with OrderEntry 9.3A or higher.

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 Tech-Tips on the ReportConvertor and Speed Improvement Tips for Custom Reports.

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

Softrak provides only limited support on the Report Convertor. We do not provide support for Crystal Reports, 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. asr92atrn). 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. "SR").

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, 2013 or 2016. 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**

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**Upgrade Complexity:**     <span style="color:red">**Difficult ♦**</span>

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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.