Compatibility

Adagio

Console 9.1A - 9.3A
DataCare 9.2A – 9.3A
ePrint 9.0A, 9.2A
GridView 9.1A - 9.3B
Lanpak 9.2B, 9.3B
Ledger 9.1A – 9.3B
ODBC 9.1A, 9.2A
Payables 8.1E – 9.3C
Receivables * 9.1A – 9.3B
* = required module

Other

MS Office 2010/13/16/19/21, 365
MS Windows 8, 8.1, 10, 11
MS Server 2008R2 SP1 or higher
Crystal Reports® 2013 and 2016
   (requires Adagio ODBC 9.2A)

Note

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

Enhancements & Revisions in Time&Billing

- Import Dockets now gives a validation error when an optional field that requires a non-blank value, but not verified against a pre-defined list, has a blank value in the import file.

- Importing with Field offset was trimming the import field on the right instead of the left.

- Billing batch was attempting to bill same Work-in-process line twice on the same bill. This is now checked for during posting and the bill will be written to a error batch.

- Crystal Reports used in printing Adagio Reports was not fully compatible with the Windows 22H2 update for Windows 11 and for Windows 10, in some cases.

- A dictionary error could cause an error printing the standard File Information report.

- Using Crystal Reports to add new tables or subreports to the Time and Disbursement Ledger report could cause an error 'Failed to open the connection' due to a change in how Crystal runtime SP 25 loads tables.

- When printing a report set directly to the AdagioV2PDF driver, and you choose to cancel printing for a particular report from the PDF Save As screen, you are now prompted to cancel printing just that report or the entire report set. This choice is written to the report log.

- In Automation, the SetSessionDate command has a new noun for: Yesterday.

- New automation command nouns have been added to allow attaching report set PDF files to the email with the automation log results, to allow reports from multiple applications to be attached on a single email. The EmailPDFAutoLog has Overwrite/Attach and Append/Attach nouns to include PDF files from report sets. The 9.3A release of Adagio Console is required to use this feature.

- The 64-bit version of Adagio GridView (if available) is launched from the Adagio menu and for custom Views added to the Inquiries menu. The 64-bit version makes use of more memory (if available), allowing for views on larger databases and it can be faster. Note: this is not yet supported on Adagio Cloud.

- When Adagio DocStore is integrated, report sets can now be emailed to selected recipients, with PDF or Excel file attachments for each report.

Enhancements and revisions in TimeKeeper

- There were no changes to TimeKeeper for this release.

Enhancements and revisions in earlier versions

Refer to the Readme help file for details of enhancements and revisions in earlier versions or Change Log under Documentation for this module on Softrak's web site.

Installing

To install Adagio Time&Billing 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 Time&Billing 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 Time&Billing 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 Time&Billing is installed on a network, you may also need to do a workstation install at each station running Adagio Time&Billing.

To determine if a workstation install is required, start Adagio Time&Billing at the workstation. The workstation install will be automatically started if required. Note: If you are updating multiple applications at the same time, it may be faster to run the All Workstation install to update all applications at once on the station. Refer to "Installing on a Network" in the Readme for instructions.

Adagio Time&Billing 9.2A **requires Adagio Lanpak (if used) to be version 9.2B** or higher.

Upgrading

Upgrading from 8.1D   **Upgrade Complexity:**   **Intermediate** ◼

If you have custom reports and/or views for Time&Billing 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 Time&Billing 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.

Adagio Time&Billing 9.2A requires a minor database conversion from earlier versions. You can convert your Time&Billing database at any time.

To start the conversion, open your current database for the first time in Time&Billing 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.

Note: The conversion to Time&Billing 9.2A will delete ALL existing import/export templates and create new default templates. **You should print any template you use <u>before</u> installing the 9.2A upgrade** so you can easily recreate them after conversion.

Remote users must install the TimeKeeper 9.2A upgrade on their remote computer. From the network drive where Adagio Time&Billing has been installed, run: \SOFTRAK\TimeBilling\WKSETUP\TKSETUP.EXE. Immediately after installing TimeKeeper on the remote computer, you must run it and do a Refresh to update the data files to their 9.2A versions on the remote computer.

Time&Billing 9.2A is compatible with Receivables 9.2A. However, Time&Billing limits Customer name and address fields to 30 characters on Bills, although these fields are 40 characters in Receivables. You may want to enable the option 'Limit address to 30 characters' in the Receivables Company Profile to ensure fields will not be cut off when printing Bills.

Time&Billing 9.2A now installs to the \Softrak\TimeBilling folder and the program name is TimeBilling.exe. Previous versions were installed in \Softrak\TBWin and had a program name of TBWin.exe. The TimeKeeper program name changes from TKWin.exe to TimeKeeper.exe. When an Adagio Time&Billing 9.2A upgrade is installed, it automatically uninstalls any prior version of Adagio Time&Billing.

The upgrade install cannot change any custom icons you may have created to launch Time&Billing or TimeKeeper and will display a "Problem with Shortcut" error if they are launched. You must change these icons manually to run Time&Billing from \Softrak\TimeBilling\TimeBilling.exe and \Softrak\TimeBilling\TimeKeeper.exe or create new ones.

Time&Billing 9.2A installs an updated version of the AdagioPDF driver. The updated driver name is AdagioV2PDF and will appear in Windows Control Panel, Devices and Printers. This requires a workstation install on each station that runs Time&Billing. To run the workstation install, start Adagio Time&Billing at each workstation and 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.

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 9.2 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 9.2 modules have already been installed, these packages will not need to be downloaded. Adagio ODBC drivers are installed by version 9.2 applications – Adagio ODBC 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 Time&Billing have been converted for Crystal Reports 2013/2016 and can be modified with Crystal Reports 2013/2016. Custom reports created with Crystal Reports 2013 or 2016 can be added to the Reports menu by placing them in \Softrak\TimeBilling\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 'Adagio Time&Billing 8.1CA-8.1D' (@B81C) to 'Adagio Time&Billing 9.2A' (@B92A) was required in order to support new features added for this version. GridView views created for earlier versions of Adagio Time&Billing should be recreated using tables from 'Adagio Time&Billing 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 "T/B or TB" and ones for use by its reports do not. When creating new views you must use the tables starting with "T/B or TB". GridView 9.2B and higher hides tables used by the reports so they cannot be used inadvertently. Tables starting with "TB" (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 'Adagio Time&Billing 9.2A' dictionary.

Views from your prior version located in \Softrak\TBWin\Views will be copied to the folder \Softrak\TimeBilling\Views.priorversion. Recreated views must be placed in \Softrak\TimeBilling\Views. When you are certain the original views are no longer needed, you can delete the \Softrak\TimeBilling\Views.priorversion folder.

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 useful for comparing tables in the Adagio Time&Billing 9.2A 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 Time&Billing, you will have to redo those modifications for Time&Billing 9.2A. Modified reports are files with a .rpt

extension that you copied from \Softrak\TBWin\StandardRP to \Softrak\TBWin\ModRP and modified using Crystal Reports 8.5 for Adagio. Your modified reports from your prior version will be copied to the folder \Softrak\TimeBilling\ModifiedReports.priorversion. These same reports must be recopied from \Softrak\TimeBilling\StandardReports to \Softrak\TimeBilling\ModifiedReports and remodified using Crystal Reports 2013 or 2016. 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\TimeBilling\ModifiedReports.priorversion folder.

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

A Report Convertor Utility is available from Softrak Systems for the purpose of converting Crystal Reports 7 and 8.5 reports that use the old Crystal Reports Print Engine (CRPE32.dll) to Crystal Reports 2013/2016 format, using the Adagio ODBC driver. Converted reports can be edited and new reports can be created using Crystal Reports 2013 or 2016. Adagio ODBC must be installed to be able to do this. **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 Time&Billing 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 Time&Billing 9.2A did not change significantly. Existing custom reports cannot be printed from the Custom Reports menu of Time&Billing 9.2A and may not function for future versions of Time&Billing. Softrak no longer provides support for Crystal Reports 8.5 for Adagio.

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 support new versions of Crystal Reports itself, except as support is related to assisting you to locate data in the Adagio tables. 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 Time&Billing 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" (eg. ab92adckcrview for Dockets). Standard tables do not (eg. ab92adck). Use the "crview" tables for modified reports or when converting existing custom reports. When creating new reports, use the standard tables without "crview". Future versions of Adagio will begin to use the standard tables for reporting. You must create a shortcut and add the parameter /ODBC to include the "crview" tables in the export to Excel in the DDE. Note: the "crview" field names are not prefixed with the application code (e.g. "OE").

When you are certain the original reports are no longer needed, you can delete the \Softrak\Time&BillingCustomReports.priorversion folder.

An updated version of Adagio PrintTool (PT) is installed in \Softrak\PrintTool. PT 9.2A prints custom reports created with Crystal Reports 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 8.1C or earlier

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