

Release Notes

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



Adagio

DataCare 8.0A
GridView 6.8A – 8.0D
Lanpak 6.8A
Ledger 6.8A – 8.0C
OLEDB 6.8A
Payables 6.8A – 8.0A
Receivables 8.0A (required)
Crystal Reports® 8.5 for Adagio

Other

MS Office 97 - 2003
MS Windows 98, NT, 2000, XP

Enhancements and revisions in Adagio Time&Billing 8.0A (2006.03.07)

- ◆ A Billing History inquiry has been added. Billing history was being captured for all billings postings in T&B 6.8A if you had selected the option 'Retain transaction history' in the Company Profile. However, the billing history transactions have not been accessible to the user via inquiry, report or custom Crystal Reports for Adagio report until now (they have been accessible to GridView). Note that this option is now called 'Retain billing history'.
- ◆ Billing Invoices can be reprinted from history. Invoices can also be faxed or emailed from history.
- ◆ Billing History Listing report has been added.
- ◆ Time and Disbursement (T&D) history was being captured for all T&D postings in T&B 6.8A if you had selected the option 'Retain transaction history' in the Company Profile. However, the T&D history transactions have not been accessible to the user until now (they have been accessible to GridView). Note that this option is now called 'Retain time and disb. History'. A Time/Disbursement History report has been added to view these transactions.
- ◆ Purge Billing History and Purge Time & Disbursement History functions have been added.
- ◆ Formatted address spec codes have been to the designer (C 62-C 66).
- ◆ An option to retrieve vendor name (rather than Vendor Number and Name) when retrieving disbursements from Payables has been added. You may want to use this option if you show disbursement details on bills as your Vendor Number is of no interest to your clients. This option can be selected when you retrieve disbursements.
- ◆ Email billing invoices as a PDF attachment through MAPI compliant email clients (such as Outlook) or directly using SMTP. Email cover letters (in text format) may be entered, stored on file and selected by customer when emailing bills. Email cover can include fields from the bill and the customer. Emailed bills are logged in an email queue. They can be viewed and resent from the queue and the queue can be printed.
- ◆ Customer Edit and View functions in Adagio Time&Billing support the many new fields and features found in customer in Adagio Receivables 8.0A and higher.
- ◆ Customer grids, finders and smart finders can now access Optional fields and other new fields in the Customers.
- ◆ New spec codes have been added to allow you to print the new fields in customers on bills. They are: C 51-C 66 for the customer email address, website, optional fields and formatted address fields. The TB\$ALL.SAM specification includes all the new fields.
- ◆ Added Customer Inquiry.
- ◆ Alerts entered for customers in Adagio Receivables will pop-up in Time and Disbursement and Billing batch entry as well as Edit and View Customers.
- ◆ Find button has been added to the Edit Disbursements.
- ◆ Sample data has been updated to demonstrate the new fields and features in this release.

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- ◆ The function 'Active Users' has been added to the Help menu. This function lists the users and the applications they have open for the company you have open.
- ◆ GridView has been added to the Adagio menu. For users to be permitted to create or edit views in GridView when launched from the Adagio menu you must edit the User and select the new option 'Edit GridView'.
- ◆ Users of Adagio GridView can add views to the Inquiry menu. To use this feature, create a Workspace in GridView containing one or more Views, copy the Workspace (.gvs) and Views (.gv) it uses to \sofrak\tbwin\views. GridView must be version 8.0A or higher.
- ◆ The billing invoice specification designer was updated. The menu bar, property dialogs, and Spec Codes list positioning have been improved.
- ◆ The F2 key now supports Windows standard behavior by editing the line selected on a grid (same as clicking the Edit button).
- ◆ The F6 key now opens the smart finder directly from any grid where you can do a find. You do not have to press F5 or the Find button first to invoke the smart finder.
- ◆ The Windows calculator can added to and launched from the toolbar by selecting 'Calculator button' in File | Options.
- ◆ The date of the last data integrity check is now displayed in the status bar.
- ◆ The Data Integrity Checker memo now shows the date the integrity check was run, the starting and ending time, the path and extension of the data and the user name.
- ◆ The Data Integrity Checker now writes full details of the integrity check into the log file (TBWINERR.xxx, where xxx is your company data extension).
- ◆ The source files for all reports in Adagio Invoice are installed in the StandardRP sub-directory rather in the program directory \Softrak\TBWin. You can modify the built-in reports using Crystal Reports for Adagio and place them in \Softrak\TBWin\ModRP. Adagio Time&Billing will print the modified version of the report from ModRP directory. This allows future installations of Adagio Time&Billing to update report files without over-writing custom versions of the report. Note: customizations to built-in reports should be redone on any updated report file to take advantage of revisions in the updated version.
- ◆ Settings on the Print Invoice dialog are now remembered. Set the 'Remember report settings' option in the Company Profile (Print/Post tab) to enable this feature.
- ◆ Date parameter /T to force the session date now accepted on launch of T&B.
- ◆ You can now multi-select lines in the fax queue.
- ◆ Excel Direct feature added to Smart Finder. Click the Excel Direct button to launch Excel and export the Smart Finder results to a workbook. The Column Editor in the Smart Finder can be used to select the columns and header titles to export.
- ◆ Adagio Time&Billing now allows you to run multiple instances on the same workstation. This allows sites with multiple companies to open Adagio Time&Billing for more than one company at a time on the same computer. It also benefits single company sites that want to perform 2 or more functions at the same time, such as entering batches and printing reports. Each additional instance uses a license therefore an Adagio Lanpak must be installed to use this feature.
- ◆ When you start Adagio Time&Billing, it now checks the "Opportunistic Locking" settings to ensure they are correctly set on the workstation. If the settings are incorrect, a warning and instructions are displayed. Proper "Opportunistic Locking" settings are required at each workstation (and on the server) to ensure the integrity of your accounting data in a multi-user environment.
- ◆ The background color of the main window can be set by company in Edit Company Profile. This provides a visual cue to easily distinguish multiple instances for different companies.
- ◆ Users of Crystal Reports for Adagio can create custom reports and have them appear on the Reports menu in Adagio Time&Billing. This allows users to print, preview and export custom reports without needing to run Crystal Reports. This feature is only available if a copy of Crystal Reports for Adagio is installed, and requires Crystal Reports for Adagio to be registered within 60 days of installation. **This feature requires Crystal Reports for Adagio 8.5 (2002.09.23) or later.**
- ◆ The list of recently opened databases has been expanded from 10 to 25 entries. Duplicate entries where the characters of the path have a different case are now removed.
- ◆ Multiple users can now print the same report at the same time.
- ◆ The options and ranges chosen on report dialogs when you print a report are saved by company for the next time the report is printed.

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- ◆ File | Options are now saved by workstation rather than globally. One advantage of this is that it allows workstations to select different specific printers when local printers are used.
- ◆ The Smart Finder search criteria (e.g. "sounds like") is now saved for the next time you use Smart Finder, rather than always defaulting to "contains".
- ◆ Screens now open at a more logical position on dual monitor systems.
- ◆ When printing reports to file, you can now choose from three different formats on the print dialog: Excel, HTML, or Word. The default format can be set in the Company Profile.
- ◆ When printing reports to file, the filename defaults to the name of the report rather than the generic filename ADAGIO.TXT.
- ◆ Posting journals can now be printed automatically after posting. If you do not purge posting journals, this saves you from having to manually select the last posting sequence when printing posting journals. To use this feature, set the 'Auto print posting journal after post' option in the Company Profile.
- ◆ The size and position of the Adagio Time&Billing and Designer main windows is now saved when the appropriate options are selected in the File | Options menu.
- ◆ The install now checks to ensure the current user has rights to write to the Adagio program directories. It also checks that the current user can access the areas of the Windows registry required to install and run Adagio. The chksys utility also makes these checks for the current user.
- ◆ Multiple users can print the same report at the same time.
- ◆ When importing Disbursements, the 'MTD – Amount' field had to be imported or defaulted, even though it is a statistic field that is not absolutely required.
- ◆ When importing to update customers, some fields not imported were cleared in the customer, causing integrity errors.
- ◆ The Generate Bills function did not pick up the second customer name field from the customer record.
- ◆ Send to back in the specification designer did not reliably send fields to back to allow you to get to the fields lying under them.
- ◆ In the specification designer, the date format dd-mmm-yy was is always center aligned if the Auto-size field property was used.
- ◆ The Edit Dockets grid was not refreshed correctly in some cases when restricted by Customer.
- ◆ The Tax Jurisdiction Amount and Description fields could not be printed on the Bill footer if the tax jurisdictions were set to 'Total only'.
- ◆ The Billing Memos report printed extra text at the top of the report in some cases when printed with the 'Use extended Desc.' Option.
- ◆ When choosing fields to retrieve from Payables, the Header description was actually the Detail description, and vice versa.
- ◆ The 'Descriptions for Bill' field was not available when importing customers.
- ◆ The Rate on the Payroll Time Transactions report was incorrect when the report was consolidated and printed.
- ◆ The Time and Disbursements Batch Listing now flags invalid fields, including Customer, Control Account, Docket and Docket Type.
- ◆ The invoice number on a billing batch entry now allows alphanumeric characters rather than only numeric characters.
- ◆ On the Source Code listing report, the GL account listed for WIP Write off was printed under the WIP Clearing header, and vice versa.
- ◆ The total disbursements shown on the Billings Posting Journal was incorrect if you billed more than one disbursement code on the same billing line.
- ◆ When importing Dockets, the Billing Level was set to the value in the Company Profile rather than the value in the import file.
- ◆ If you set the Fees to 0.00 in a billing batch the auto-distribute amounts were incorrect in some cases.
- ◆ Bills were not generated for a client if the client had Dockets that contained non-billable entries only before the first billable entry.
- ◆ Amounts for H11 and H14 spec codes did not print correctly if your bill spec did not have a bill line detail section.
- ◆ On the Time Utilization report, the 'Effective Rate' and '% of standard realized' fields were not correct if a write off amount was applied to the bill.

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- ◆ Expanded the description on the Billing Memo report in cases where not a progress bill and therefore more room is available.
- ◆ You could not print the Aged WIP report in some cases if customers were created in an application that does not support Adagio Time&Billing, possibly ACCPAC® Plus AR, or old versions of Adagio OrderEntry, Adagio Invoices, etc.
- ◆ On the T&B Billing Action report, the Total Outstanding column did not show sum the A/R Balance and the Net Unbilled in the Customer Total. It only shows the Net Unbilled. The Subtotal by Responsible Staff member did not show the Grand total of the A/R Balances above it.
- ◆ Added Date Range on the T&D Ledger report.
- ◆ In some case when importing with the option 'Overwrite records' fields were required to be in the import file when they should not have been required.
- ◆ Import / Export supports 4 digit years in dates (YYYYMMDD).
- ◆ Import / Export screens displayed with slider bars on machines running Windows XP.
- ◆ The 'Print/Consolidate G/L Transactions' report menu choice has been moved to the main reports menu for consistency with other Adagio modules.
- ◆ Deleting batch entries in rapid succession caused an error in some cases.
- ◆ If you bill time or disbursements for less than the recorded amount, 'Write off' is now the default rather than 'Balance Forward' as you are more likely to write off under-billed time.
- ◆ Copy-specific fields on billing invoices did not print on the correct copy.

Enhancements and revisions in TimeKeeper

- ◆ Time Keeper can now be run remotely on a laptop and your time submitted when you next connect to your LAN. The Submit Remote function submits time and disbursements entered remotely to the Time&Billing database on the LAN. The Remote Synch function updates copies of the Client (Customer), Docket (File), Source Code and Disbursement Code tables on the laptop. The Remote Synch function also updates licensing information on the laptop (note that Time&Billing must be registered and licensed on the LAN and a Remote Synch performed to license TimeKeeper on the laptop). **You are required to have as many Adagio Lanpaks installed on the LAN as there will be remote laptops running TimeKeeper.** This is in addition to the Lanpaks required to run all other Adagio modules multi-user. A Remote TimeKeeper install program must be run to install TimeKeeper on the laptop when it is connected to the LAN.
- ◆ An option has been added to allow timers to run concurrently. This may be useful if you work on 2 or more matters at the same time. Option is 'Allow multiple active timers'.
- ◆ Added an option to keep memo text when timers are submitted. If you choose to "Reset timers", you can also say to "Keep text." Use this option if you use predefined timers with standard memo text and do not want to have to reenter the memo text after submitting.
- ◆ Added an option to check the spread time on Submit All. The option is 'Warn if time is outside x hours, plus/minus y minutes'.
- ◆ Added an option to check that the maximum time on an individual timer does not exceed a programmable amount. It is primarily for catching the mistake of wanting to give a timer 22 minutes, but accidentally typing, for instance, "22", which gives it 22 hours. Option is 'Warn if timer exceeds n hours, when saving a timer entry'.
- ◆ Timer buttons can now be arranged by drag and drop.
- ◆ You can now transfer time from one timer to another by Alt-dragging the button. If you Alt-drag a button, a window pops up allowing you to select the amount of time to transfer from one button to another. The dragged button has its detailed time log displayed as a reference if you just want part of the time to be transferred.
- ◆ The time text (second line) of the running timer is bolded to make the timer stand out more from other timers.
- ◆ The total time for all timers is now shown on Submit All dialog. This allows reasonableness check of hours when you submit daily.
- ◆ An option to ignore timers with less than x time when Submit All has been added. This is for situations where you accidentally start a new timer, or hit the wrong one, giving it 1 or 2 seconds of time. The option is 'Do not submit timers with less than n seconds'. If it is set to zero, only timers with time greater than zero are submitted.
- ◆ An option has been added to warn you if a timer is submitted with blank memo text. The timer is opened during the submit to allow you to enter text. The option is 'Warn if no memo text'.

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- ◆ n option has been added to automatically put the timer button description text into the memo text if the memo is blank when you submit. The new option is 'Use Timer Name if no memo text'.
- ◆ Once you have made the TimeKeeper window focused, if you hover your mouse over the "New Timer button", that is, the top, left-most button on the main form, it will now show the last button that was active, and when it was ended. In addition, the text of the last button to run will be in bold. This can be useful if you forgot to start a button and are not sure which timer was last active or when.
- ◆ In the Edit timer dialog, a box has been added around the Delete and Submit buttons to clarify that these refer to the entire timer and not simply a log entry.
- ◆ The position of the TimeKeeper window is now remembered independently for each workstation. Previously the TimeKeeper window could open outside the viewing area of the monitor for some users if other users had different screen resolutions or used multiple monitors.
- ◆ Multiple monitors are now supported the position off the TimeKeeper window on the 2nd monitor is remembered (previously it repositioned to the right-most side of first monitor in some cases).
- ◆ Date parameter /T to force the session date now accepted on launch of TimeKeeper.
- ◆ Once you have made the TimeKeeper window focused, if you hover your mouse over the "Setup / Submit button", that is, the button third from the left on the main form, it will now show the version and revision date of the TimeKeeper program.
- ◆ An error occurred when you deleted a timer button.
- ◆ Date field has been added to the Edit Disbursements function.
- ◆ Smart finder did not work on the Disbursement code when editing a timer.
- ◆ When editing a timer, the tab sequence skipped the Docket field.

Enhancements and revisions in earlier versions of Adagio Time&Billing

- ◆ Refer to the Readme help file for details of enhancements and revisions in earlier versions.

Installing

To install Adagio Time&Billing from the Adagio Product CD, you need the serial number and install code from the Product Label that came with your CD.

If you are installing an upgrade, you need the serial number and install code from the Upgrade Product Label that came with your upgrade CD. 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 your previous 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 Time&Billing 8.0A must be installed before the Service Pack can be installed.

To install Adagio Time&Billing (or an upgrade), insert the CD in the drive. If the install program does not start automatically, run ADAGIO.EXE from the root of the CD. Once the install program is running you can click the View button for detailed instructions in the Readme help. If Adagio Time&Billing is installed on a network, you must also do a workstation install for each workstation running Adagio Time&Billing. Refer to the manual or "Installing on a network" in the Readme help for instructions.

To install the Adagio Time&Billing 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 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 requires Adagio Receivables to run. Adagio Receivables must be at least version 8.0A. You must open your AR database at least once with Adagio Receivables 8.0A before opening your data with Adagio Time&Billing 8.0A.

Adagio Payables is optional. Adagio Payables must be version 6.8A (2002.06.18) or later. Adagio Payables 8.0A or higher is recommended.

If you are using ACCPAC Plus, be sure to read the Important Notes and Considerations for ACCPAC Plus Users sections in the Readme help for important information. **Using ACCPAC Plus Accounts Payable with your Time&Billing data can corrupt the database.**

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