

# Adagio® Time&Billing 8.1A (2008.05.16)

## Release Notes

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



### Adagio

DataCare 8.0A – 8.1A  
GridView 6.8A – 8.1A  
Lanpak 9.0A  
Ledger 6.8A – 9.0A  
OLEDB 6.8A – 8.0A  
Payables 6.8A – 8.1A  
Receivables 8.0A – 8.1A (required)  
Crystal Reports® 8.5 for Adagio

### Other

MS Office 97 – 2003, 2007  
MS Windows 2000, XP, Vista

### Enhancements and revisions in Adagio Time&Billing 8.1A (2008.05.16)

- ◆ Compatible with Windows® Vista™.
- ◆ Compatible with Adagio Lanpak 9.0A. Lanpak must be 9.0A or higher.
- ◆ Smart Finder can now search on multiple criteria.
- ◆ Contents of disabled fields are shown in blue rather than dimmed gray. This may be easier to read on some monitors at higher resolutions.
- ◆ Adagio download files, installs, workstation installs, all workstation install (softtrak\allwkst\allwkst.exe), program files and the Adagio Check System utility (chksys.exe) are now signed with a digital certificate using VeriSign to allow you to verify the Publisher is Softtrak Systems Inc.
- ◆ Vista does not support the old style Windows Help (.HLP files). All .HLP files were converted to compiled HTML help (.CHM files), which are supported by Vista.
- ◆ For security reasons Windows does not permit .CHM help files to be run from a network drive. This is true in XP as well as Vista. The .CHM files must be run from a local drive. Adagio 8.1A installs all .CHM help files to your local hard drive and loads them from there. The workstation install also copies .CHM files to the local drive.
- ◆ Fax document image files were created in earlier versions using the Softfax printer driver. This driver is not compatible with Vista. In 8.1A versions, faxing billing documents created with the Specification Designer creates a fax image file directly. The Softtrak Softfax driver is no longer used. However, the driver is installed for use by third-party products. Third-party products that use the driver should eventually be updated to support faxing on Vista. Until that time they will continue to be able to fax on XP and earlier versions of Windows. Note that to run the Adagio fax server (Fax/Email | Fax Queue) you must have a 'true' fax card (with an on-board fax chip) rather than a Win Fax modem (which emulates a chip in software).
- ◆ When switching windows/tasks in Vista with Alt-Tab or the new Flip 3D (Windows-Tab) an image of the current Adagio screen is shown rather than just the icon of the Adagio program.
- ◆ You can now backup Adagio data in zip form to WebSafe, a web-based storage facility. WebSafe is a service which allows you to store your important information in a secure location that you can access from anywhere in the world. See [www.websafe.com](http://www.websafe.com) for details.
- ◆ The formatting of dates and text sent to Excel from Smart Finder results has been improved.
- ◆ Adagio Time&Billing supports Adagio Ledger 9.0A. Fields required for future drill-down from Ledger to Time&Billing are included in the GL transaction batch and will be retrieved by Ledger 8.1A and higher.

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- ◆ A 'User defined' field has been added to the G/L Description 'Send to' options in the Company Profile. This allows you to format the G/L Description field sent to the GL using a combination of fields from the invoice / bill, customer and free form text. The following specification codes are supported.

Code	Description
%cst	Customer code
%cnm	Customer name
%cn2	Customer name 2
%ref	Reference (Bills only)
%inv	Invoice document number (Bills only)
%des	Description
%psq	Posting sequence
%bat	Batch number
%ent	Entry number
%don	Docket number
%dnm	Docket name
%stf	Staff member (T&D transactions only)
%src	Source code (T&D transactions only)
%dis	Disbursement (T&D transactions only)
%os1	Cust Optional string 1
%os2	Cust Optional string 2
%os3	Cust Optional string 3
%od1	Cust Optional date 1
%od2	Cust Optional date 2
%oa1	Cust Optional amount 1
%oa2	Cust Optional amount 2
%ou1	Cust Optional unit 1
%ou2	Cust Optional unit 2

- ◆ The specification designer toolbar now fits on one rather than 2 lines at most common screen resolutions.
- ◆ The designer allows you to open specifications by using the spec Title under File | Specification Options. This is the same list of titles displayed in Time&Billing when selecting a document to print, fax or email. Previously you could open the specification by its file name only.
- ◆ An 'Active item' field has been added to Files (Dockets).
- ◆ Added the option 'Include batch in G/L description' option to send the batch number and entry to the description to Adagio Ledger.
- ◆ Adagio Receivables 8.1A added a feature to now allow users to add and edit customer notes but at the same time prevent them from adding, deleting or editing customers. Time&Billing now supports this feature. It uses the security option in Groups in Receivables.
- ◆ Edit Customer and View Customer now show the 'Active' field available in Adagio Receivables 8.0B and higher.
- ◆ Transactions could not be consolidated by the Print/Consolidate G/L Transactions function and an error was displayed.
- ◆ The fax field on a bill stored the phone number instead of the fax number. This prevented the fax number (code C11) from printing on bills.
- ◆ The Smart Finder did not work on the Customer field if Adagio Receivables 8.0B or higher was installed.
- ◆ The smart finder did not work on the Email Cover field.
- ◆ On the Edit Files screen, search by Files did not work and gave an error.
- ◆ The wrong WIP Account was cleared if multiple, different, Disbursements were billed in a single Bill Line, and the accounting method for Disbursements was by Disbursement.
- ◆ The Closed File Cross Reference List could not be printed if sorted by 'File number'.
- ◆ The Hours were not printing correctly on Time/Disbursement History report in some cases.
- ◆ Batch errors were not indicated on the Billing Batch Listing.

## Enhancements and revisions in TimeKeeper

- ◆ An 'Export' button has been added to the Setup screen. This allows you to export Timer (button), timesheet and disbursement information to Excel. You can select the fields you want to send to Excel.
- ◆ TimeKeeper supports Customer Alerts. An alert pops up when you first click a timer in a session and when you edit the Customer.

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- ◆ TimeKeeper supports the 'Active item' field added to Files (Dockets). An error is given when you submit a timer for an inactive File (Docket).
- ◆ The option 'Show only active timers' option added. Use this option to show only the active timer(s) when TimeKeeper is not the active window. This reduces the amount of real-estate used by the TimeKeeper window to make it small enough to use the 'Always on top' option. Having TimeKeeper on top allows you to constantly monitor and verify the timer you are running.
- ◆ The option 'Edit timer when first clicked' has been added. This reminds you to enter a description for the timer, or if you use the 'Keep text' option, to change the previous text as needed.
- ◆ Alt-dragging a timer, to move time from one timer to another, defaults the time you enter to minutes. Previously the default was to hours and you had to remember to enter zero and colon in front of the minutes. Transferring time is usually done to correct a mistake of running the wrong timer and thus the amount to correct is usually in minutes.
- ◆ Double-clicking on a log line in the 'Transfer Time to Another Timer' screen when you alt-drag a timer defaults the time to transfer to the time for the log entry rather than the total time of the timer.
- ◆ 'Refresh Remote' now supports remote sites that have no other Adagio modules installed other than TimeKeeper. It allows the remote user to log into TimeKeeper with the same User ID and Password they use when logged in on the LAN.
- ◆ An option has been added to Remote Submit to replace the remote timer buttons with the current buttons from the LAN to reduce the changes you need to make to your remote buttons. Set the 'Replace remote timers with current timers' option on the Refresh Remote Data screen when submitting remotely.
- ◆ The composite table 'T/B Time Keeper w Description' has been added to allow a view in Adagio GridView to include all fields from a timers, including text from the description memo field.
- ◆ You could not enter a Disbursement with a date other than today's date in the Not For Sale (NFR) version.

## 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 that came with your upgrade. 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 8.1A 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. Or, if Adagio Time&Billing was downloaded, run the program file you downloaded. 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.**

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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.**

## Upgrading to this Version

Adagio Time&Billing 8.1A **requires Adagio Lanpak to be version 9.0A** or higher. New versions of products require Lanpak to be at the currently shipping version. **Do not install this upgrade before you have installed Lanpak 9.0A if you require multiple users in Adagio Time&Billing.** If you have any prior version Lanpaks installed but no 9.0A Lanpaks the Adagio Time&Billing install will warn you.

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