

**Compatibility****Adagio**

Console 9.1A – 9.2B
DataCare 9.2A
DocStore 9.3A
ePrint 9.0A, 9.2A
GridView 8.1A - 9.2B
Inventory 8.1E, 9.2A
JobCost 8.1B – 9.2A
Lanpak 9.3A
Ledger 9.0C – 9.3A
MultiCurrency 9.2B
ODBC 9.1A, 9.2A
OrderEntry 8.1D – 9.2A
Payables * 8.1E – 9.3A
* = module required

Other

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

Note

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

Enhancements in PurchaseOrders

- Corrections and updates were made for DocStore function in PurchaseOrders for future release of Adagio DocStore.
- The Doc Link field now shows “Linked” on grids when DocStore document(s) are attached (or blank if no documents are attached).
- The ExcelDirect Print option ‘Open Spreadsheet’ is now available on Adagio Cloud.
- When the ‘Allow cost override?’ option in the Company Profile or Security Group was disabled, it prevented the user from changing the Unit Cost but not the Extended Cost.
- The Find on Sundry Items for single-segment item numbers did not allow you to enter the full item number.
- Changes made to the grid on the Purchase Orders tab in the IC Item with Sales and Costs inquiry with the Column Editor were lost when the Edit or View Vendor functions were used.
- In PurchaseOrders 9.3A, there was an error in the Auto Generate Purchase Orders from Inventory function when you right-clicked on the grid and used ‘Select/Unselect All’ then clicked the Create PO button.

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

To determine if a workstation install is required, start Adagio PurchaseOrders 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.

PurchaseOrders 9.3A 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 will require a workstation install on each station that runs PurchaseOrders unless AdagioV2PDF has already been installed by another Adagio module.

Adagio PurchaseOrders requires Adagio Payables and a Payables database must exist for PurchaseOrders to run.

PurchaseOrders 9.3A requires some Adagio modules to be at a certain version or higher. See compatibility information below or the Adagio Compatibility Chart.

PurchaseOrders 9.3A requires Adagio Lanpak (if used) to be version 9.3A or higher.

PurchaseOrders 9.3A requires these modules (if used) be at the specified version or higher. If an earlier version of Ledger data is detected, an error message is displayed and PurchaseOrders will not open the database.

- Inventory 8.1E or higher
- JobCost 8.1B or higher
- Ledger 9.0C or higher
- OrderEntry 8.1D or higher, 9.2A (2016.01.11) or higher preferred
- Payables 8.1E or higher

Display of transactions for PurchaseOrders 9.2B or higher in the Edit / View Vendor functions requires Payables 9.2B or higher, and BankRec 9.2A (2016.06.06) or higher. For earlier versions, these transactions can be viewed in the Edit / View Vendor functions in PurchaseOrders.

The Item Inquiry with Sales and Cost function requires Inventory 9.2A (2016.04.25), Invoices 9.2A (2016.05.07), and SalesAnalysis 9.2A (2016.06.08), or higher versions, to display the purchase order details correctly on the current or archived documents grids. This display issue will be addressed in the next Service Pack for SalesCQ. For SalesCQ and earlier versions of these modules, use the item display in Adagio PurchaseOrders.

The Auto Generate POs from OrderEntry function did not work if you have OrderEntry 9.2A (2015.07.29). Orders entered with this version of OE 9.2A did not generate PO's. Orders entered with a previous version of OE and orders created by transfer from SalesCQ did not have a problem. This was corrected in OrderEntry 9.2A (2016.01.11). If you entered orders in the 9.2A (2015.07.29) version, you must open the data with PurchaseOrders first and then do a Data Integrity Check in OE. Errors will be reported for each detail line entered in OE 9.2A (2015.07.29). You must do a rebuild and all errors will be corrected without loss of data. The Auto Generate will then work correctly.

PurchaseOrders 9.3A requires Adagio MultiCurrency (if used) to be version 9.2B or higher.

The data structure for PurchaseOrders 9.2B and 9.3A was changed and expanded significantly. Programs from Adagio Developer Partners (ADPs) that read or write the PurchaseOrders data will require a compatibility upgrade. Check with the developer or your Adagio dealer to ensure an upgrade is available before installing or upgrading to PurchaseOrders 9.3A.

PurchaseOrders does not have a Manual in PDF form. Use the online help instead. The help fully documents all aspects of the product.

Upgrading to 9.3A

Upgrading from 9.2B

Upgrade Complexity:

Easy ●

Adagio PurchaseOrders 9.3A does a minor database conversion from 9.2B. It converts the PO item history file. You can convert your P/O database at any time.

The future release of OrderEntry 9.3A Order Number is expanded to length 12 and therefore is also in these PO 9.3A tables:

- P/O Header
- P/O Header History
- P/O Header Requisitions
- P/O item history file
- P/O Details
- P/O Details History
- P/O Details Requisitions

In addition, the OE93A Order Key field has been added to the detail record.

The ExcelDirect Print function has been added for some reports. During conversion you will be asked if you want to enable the option for in the Company profile and for all User Preferences.

If you are using Adagio DocStore, it is imperative the DocStore database be included with all backups of your PurchaseOrders database. All backup zip files created by the File | Backup functions in Payables include the DocStore database. In Adagio DataCare, the DocStore database is backed up by Jobs checking 'Adagio Common Files' with the 'Include in backup' option enabled. For a manual backup, include all data files beginning with "SD".

Upgrading from 9.2A

Upgrade Complexity:

Difficult ◆

Installing the upgrade:

Adagio PurchaseOrders 9.3A is a major upgrade, containing many changes and new features. It is very important to review the information below before installing the upgrade.

PurchaseOrders 9.3A requires some Adagio modules (if used) be at a certain version or higher. See the list above and check the compatibility chart. Do not install PurchaseOrders 9.3A until you are certain you have all the compatibility releases required at your site available to be installed.

The data structure for PurchaseOrders 9.3A was changed and expanded significantly. Programs from Adagio Developer Partners (ADPs) that read or write the PurchaseOrders data will require a compatibility upgrade. Check with the developer or your Adagio dealer to ensure an upgrade is available before installing or upgrading to PurchaseOrders 9.3A.

PurchaseOrders 9.3A requires a significant database conversion from versions earlier than 9.2B. You should perform a Data Integrity Check in your current version of PurchaseOrders 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 PurchaseOrders created in Crystal Reports 8.5 for Adagio / Adagio GridView, they will require conversion and adjustment for use with 9.2B. You should not install the upgrade or convert PurchaseOrders 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.

Converting your database:

Adagio PurchaseOrders 9.3A requires a significant database conversion from 9.2A.

You can convert your PurchaseOrders database at any time. To start the conversion, open your current database for the first time in PurchaseOrders 9.3A. A warning is displayed indicating the database will be converted and a backup must be made. The program allows you to make a backup at this time, before proceeding with the conversion. You should do so if you have not already made a backup.

If you are converting databases for other modules at the same time, the order in which you convert is not significant.

The conversion should only take a few minutes. However, it could take a significant period of time on databases with a large number of purchase orders or history over a network. For large databases, you may want to copy your database to a local machine, convert the data, and then copy it back. The conversion on a local drive could be 10 times faster or more. We strongly recommend you contact your Adagio dealer or consultant for assistance with this procedure.

Adagio PurchaseOrders 9.3A supports "formatted addresses" - it maintains separate fields for City, Province/State and Country; whereas in previous versions, this information was contained in free-formatted address lines. It will convert the information in address lines from previous versions to populate the City, Province/State and Country fields, at the same time removing this information from the address lines. Generally you should only use formatted addresses if you are located in Canada or the USA, and if you format vendor addresses in Payables, which requires Payables 9.2A or higher.

The conversion will ask you if you want to attempt to format your addresses according to conventions used. The conversion only formats addresses for vendors in North America. It will populate the Country field for international vendors if it can, although the address will be left unformatted.

After converting your database:

After converting you should immediately run a Data Integrity Check.

Existing purchase order specifications will continue to work without adjustment whether or not you elected to format addresses.

However, you may want to adjust or create new specifications to use the new formatted address specification codes:

- Company Address M27 – M33
- Vendor Address V52 – V58
- Bill to Address B17 – B23
- Ship to Address S20 – S26
- Pickup Address E108 - E114

The length of some fields have been increased for 9.3A. You may need to adjust the field size on specifications accordingly. For example:

- E015 FOB Point is now 40 characters
- E045 –E046 Comment Lines are now 40 characters instead of 30
- E047 PO Description is now 40 characters instead of 30.

Sample data purchase order specifications and purchase order templates in the designer have been updated to use formatted addresses fields.

You may want to turn on the 'Suppress home country on forms' option on the System Options tab. This suppresses the Country from printing in the address on purchase orders for vendors in your own country.

The Default import purchase orders and receipts templates have been simplified and use a minimum number of fields. Existing templates are converted. The 9.2A default purchase order template is not deleted, but rather converted and renamed to 'Purchase Orders 92A Default'. Sites upgrading to 9.3A who used the default import templates should not have to change the structure of an import file that was working in 9.2A or create a new template identical to the old template. The 'Auto-import on startup' option may need to be set for the converted template. The field lengths for the converted template have been updated to reflect the new length for Comment fields (40), Description fields (40) and Contact (30).

Converting Modified and Custom Reports:

If you have modified any of the standard reports installed by Adagio PurchaseOrders you will have to redo those modifications for PurchaseOrders 9.2B. Any modified reports will be located in \Softrak\PurchaseOrders\ModifiedReports. These same reports must be recopied from \Softrak\PurchaseOrders\StandardReports and re-modified using Crystal Reports 2013 or 2016. Adagio ODBC 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.

If you have custom reports, they will have to be converted or recreated. Any custom reports will be located in \Softrak\PurchaseOrders\CustomReports.

A Report Converter Utility is available from Softrak Systems for the purpose of converting custom reports created with Crystal Reports 2013 or 2016 for PurchaseOrders 9.2A to work with 9.2B. See the Tech-Tip "ConvertingCustomCrystalReportsToHigherAdagioVersion.pdf". The Report Converter Utility and related files are installed to \Softrak\System\ReportConverter.

Also see Tech-Tips and Show Me How videos on creating and converting reports on Softrak's website at <http://www.softrak.com/resources/technicaltips/technicaltips.php>. You must scroll to the Tech-Tips.

Softrak provides only limited support on the Report Converter. We do not provide support for Crystal Reports, except as support is related to assisting you to locate data in the Adagio tables. The Adagio Data Dictionary Exporter tool (DDE) is useful for locating the tables and fields in the Adagio PurchaseOrders 9.2B dictionary. The DDE program, help and manual can be run from the Windows Start menu.

The 9.2B data dictionaries contain 2 tables for each physical file - one for use by the Adagio module and one for use by reports in 9.2B 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. au92bhedcrview). Standard tables do not end with "crview" (e.g. au92bhed). 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. "PO").

Note: When PurchaseOrders 9.2B has been installed, or a new version of any Adagio module with reports that has a release date in March 2016 or later, the Report Converter will no longer convert reports from 8.1B/C/D versions to 9.2A. Such reports can only be converted to 9.2B.

Converting GridView Views

A data dictionary change from 'Adagio Purchase Orders 9.2A' (@U92A) to ' Adagio Purchase Orders 9.2B ' (@U92B) was required in order to support new features added for this version. GridView views created for earlier versions of Adagio PurchaseOrders must be recreated using tables from 'Adagio Purchase Orders 9.2B'. GridView has the ability to convert existing views to a new table.

Note: The 9.2B 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 "P/O or PO" and ones for use by its reports do not. When creating new views you must use the tables starting with "P/O or PO". GridView 9.2B and higher hides tables used by the reports so they cannot be used inadvertently. Tables starting with "PO" (no slash) are composite tables and can be used to create views.

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 Export Tool useful for comparing tables in the Adagio PurchaseOrders 9.2B 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>.

Upgrading from 8.1D

Upgrade Complexity:

Difficult ◆

Adagio PurchaseOrders 9.3A requires a significant database conversion from 8.1D or 8.1C. If converting from 8.1C, also see section below entitled 'Updating from 8.1C'.

You can convert your PurchaseOrders database at any time. To start the conversion, open your current database for the first time in PurchaseOrders 9.3A. 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 9.2B, it cannot be used with earlier versions.

Adagio 9.2A and higher uses a newer 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 9.3A 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 or higher modules have already been installed these packages will not need to be downloaded. Adagio ODBC drivers are installed by these modules – 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 PurchaseOrders have been converted for Crystal Reports 2013 and can be modified with Crystal Reports 2013 or 2016. Custom reports created with Crystal Reports can be added to the Reports menu by placing them in \Softrak\ PurchaseOrders \CustomReports. The Report Tables Drive settings and Crystal tables in the \QRASP folder are no longer 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 9.3A. 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 Purchase Orders 8.1C-8.1D' (@U81C) to ' Adagio Purchase Orders 9.2B ' (@U92B) was required in order to support new features added for this version. GridView views created for earlier versions of Adagio PurchaseOrders must be recreated using tables from 'Adagio Purchase Orders 9.2B'. GridView has the ability to convert existing views to a new table.

Note: The 9.2B 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 "P/O or PO" and ones for use by its reports do not. When creating new views you must use the tables starting with "P/O or PO". GridView 9.2B and higher hides tables used by the

reports so they cannot be used inadvertently. Tables starting with "PO" (no slash) are composite tables and can be used to create views.

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 Export Tool useful for comparing tables in the Adagio PurchaseOrders 9.2B 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 PurchaseOrders, you will have to redo those modifications for PurchaseOrders 9.2B. Modified reports are files with an .rpt extension that you copied from \Softrak\PurchaseOrders\StandardRP to \Softrak\PurchaseOrders\ModRP and modified using Crystal Reports 8.5 for Adagio. Your modified reports from your prior version will be copied to the folder \Softrak\PurchaseOrders\ModifiedReports.priorversion. These same reports must be recopied from \Softrak\PurchaseOrders\StandardReports to \Softrak\PurchaseOrders\ModifiedReports and re-modified using Crystal Reports 2013 or 2016. The Adagio ODBC 9.1A or higher module must be installed to be able to do this.

When you are certain the original modified reports are no longer needed, you can delete the \Softrak\PurchaseOrders\ModifiedReports.priorversion folder.

Custom reports created in Crystal Reports for Adagio for earlier versions of PurchaseOrders will have to be converted or recreated. Your custom reports from your prior version will be copied to the folder \Softrak\PurchaseOrders\CustomReports.priorversion. Converted or recreated custom reports must be placed in \Softrak\PurchaseOrders\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 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. **Only reports built using the most recent QRT*.QRW tables can be converted.**

The Report Convertor Utility and related files are installed to \Softrak\System\ReportConvertor. It converts reports created with Crystal Reports 8.5. See Tech-Tips on the ReportConvertor and Speed Improvement Tips for Custom Reports in this folder.

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. Note: Softrak no longer provides support for Crystal Reports 8.5 for Adagio.

As Adagio 9.2A and higher 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 PurchaseOrders 9.2B dictionary. The DDE program, help and manual can be run from the Windows Start menu.

The 9.2B data dictionaries contain 2 tables for each physical file - one for use by the Adagio module and one for use by reports in 9.2B 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. au92bhedcrview). Standard tables do not end with "crview" (e.g. au92bhed). 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. "PO").

When you are certain the original reports are no longer needed, you can delete the \Softrak\PurchaseOrders\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 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 9.2B.

Updating from 8.1C

Upgrade Complexity:

Difficult ♦

Before installing the new version you should perform a Data Integrity Check of your database(s) at your current version to ensure there are no integrity errors.

The Data Integrity Check (DIC) now checks for details on purchase orders where the Qty Ordered * Unit Cost doesn't equal Extended Cost. This check was not done in PO8.1C. Therefore errors, while rare, may be reported by the DIC after upgrading. The errors were likely created in POA. The DIC cannot rebuild these errors because it has no way of knowing which value to correct. To correct these errors, you must edit the details on the purchase orders and manually correct the appropriate field as needed.

If errors are encountered when converting to 9.3A from 8.1C, you should convert to 8.1D first and then to 9.3A. Contact your Adagio dealer or consultant.

