



Compatibility

Adagio

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

Other

MS Office 2007/10/13/16, 365
MS Windows 7 (SP1), 8, 8.1, 10
MS Server 2008R2 SP1 or higher
Crystal Reports® 2013 and 2016
(requires Adagio ODBC 9.2A)
Crystal Reports 8.5 for Adagio
(see note)

Note

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

Enhancements & Revisions in Time&Billing

- Supports Adagio Cloud.

Edits / Customers

- The finder on the GL Department field is now restricted to the departments for the account selected, without having to enable the 'Active records only' option.
- The GL Department Description is now available to be added to the GL Account finder with the Column Editor.
- File (Docket) Filters can now be displayed in Style Priority sequence. Added 'Display Priority' field to the grid in the Edit Account Filters function. This makes it easier to tell the sequence in which Styles will be applied. The setting of the sort option is saved by user.
- The Edit and View Customer functions in Time&Billing support customer changes in Receivables 9.2A.
- The Edit / View Customers / Items grids now display the total number of records, as well as a count of the displayed records when a Filter is active. An Ignore Style Color button has also been added.
- Added an option to the Transactions tab to sort customer transactions by Date or by Type/Doc No. for current, history or both.

- Transactions for Adagio Invoices 9.2A can now be shown on the Transaction tab in Edit/View Customer.

Print Bills and Designer

- The 'Default Bill Spec' from the Company Profile is used as the default if a specification is not selected in the customer. Thus, a specification does not need to be selected when printing Bills.
- New specification codes added to the designer, primarily to support formatted addresses in the Receivables Company Profile and Customer:

M13 Current user code
M14 Current user name
M15 Company contact
M16 Company number
M17 Currency symbol
M18 Company I.D. number
M19 Company home currency
M20 Company DUNS
M21-M27 Company address 1-7 (compressed)
M28-M34 Company address 1-7 (formatted)
M35 Company city
M36 Company state/province

M37 Company country
M38 Company city, state/province, zip/postal
C83-C84 Customer address 6-7 (formatted)
C88-C95 Customer address 1-7 (compressed)

Reports

- Adagio Time&Billing standard reports are now created using Crystal Reports 2013/2016.
- Fields from tables that are not in the original standard report can now be added to modified reports.
- An updated version of Adagio PrintTool is installed in \Softrak\PrintTool. It allows you to print / preview custom reports without needing to run Crystal Reports itself or without placing the report on the Custom Reports menu in an Adagio module, and allows reports to be placed on the Windows desktop.
- A new ePrint code %CDT is available to put the 'Run date' into either the PDF filename or folder name for the Aged Work in Progress report.
- The 'Allow Post Journal Purge?' option has been removed from the Company Profile. Similar to other Adagio modules, posting journals are not purged until year end.

Import / Export

- The Import / Export functions have generally been made standard with other Adagio modules.
- Import templates now have finders on fields on the Defaulted Fields tab.
- The Default Import Templates in prior versions contained all fields. The default templates have been changed to use a reduced set of fields that would more typically be required. Additional fields can be added or defaulted as needed.

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 before installing the 9.2A upgrade so you can easily recreate them after conversion.

- New export templates created for Excel format default the file extension to .XLSX rather than .XLS as in prior versions.

Miscellaneous

- Added Adagio Toolbar. You can now start other Adagio modules from toolbar buttons showing the icon for the module.
- Adagio Time&Billing now logs user activity within the module, including login/out, menu choices, enter/post batches and print bills. Audit logs may be viewed with GridView, Crystal Reports or Adagio Console.
- The email password for servers that require authentication is now encrypted in the file containing email settings for the 'Direct' email method.
- Grids may be "banded" with a User Selectable color and banding frequency set under File | User Preferences. Filter Styles may be disabled and replaced with regular banding if desired.
- The status bar at the bottom of the main window now shows activity of various steps when the program is starting up and the database is opening.
- The Column Editor screen can be sized. The size is remembered by module on the workstation.

- Updated splash screen with new Adagio logo and colors. Updated icon and toolbar button images.
- The Data Integrity Check (DIC) saves results for the last 9 previous runs in files TBWINERR01..09.dat (where .dat is your company data file extension).
- Adagio 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 program name TBWin.exe.
- 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. When installs are performed on January 1, 2017 or later 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.

Problems Fixed

- Time&Billing now renders dialogs properly on Ultra High Resolution displays when the font size is anything other than 100% of normal on Windows 8.1 or higher.
- Many other small fixes done are not listed, including many fixes to reports and import/export functions.
- Retrieving a negative Disbursement from Payables caused a data integrity error. A 'Reverse Disbursement' is now created in this case.
- You had to click on the finder button twice on the File / Docket field to open the finder if you were not already editing the field.

Enhancements and revisions in TimeKeeper

- Supports Adagio Cloud.
- Display of TimeKeeper buttons improved when you have 2 or more columns of buttons. Corrected minor issues displaying TimeKeeper and buttons on Windows 8 and 10.
- You had to click on the finder button twice on the File / Docket field to open the finder if you were not already editing the field

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 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.

Installing Time&Billing 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 Time&Billing) 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 Time&Billing 9.2A or any Adagio 9.2A module with a release date later than December 15, 2015 that prints reports 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.

Adagio Time&Billing requires Adagio Receivables to run. Adagio Receivables must be version 9.0C (2012.02.24) or higher.

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

Adagio Time&Billing 9.2A **requires Microsoft Server 2008 R2 SP1** or higher if running under Remote Desktop Services (Terminal Services). Time&Billing 9.2A may be installed to Server 2008 R1 when used as a file server from a station on a LAN. Note: Mainstream Support from Microsoft for Server 2008 R1 ended January 13, 2015.

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.

Upgrading

Upgrading from 8.1D

Upgrade Complexity: Intermediate ■

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 before 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 \\Softtrak\TimeBilling folder and the program name is TimeBilling.exe. Previous versions were installed in \\Softtrak\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 \\Softtrak\TimeBilling\TimeBilling.exe and \\Softtrak\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.

