

The Score

Backing Up Your Adagio Data

To ensure that your company data is protected, making a consistently scheduled backup in Adagio provides a safety net for those “just in case” moments.

Adagio takes the group of data files and compresses them into a standard zip file. There are three different data groups for which you can create a backup copy, which can be seen from the file menu and the backup flyout menu. Choose either the data specific to this program only, include related data required to open the program, or all Adagio program data.

Setup choices can be defined from backup options. Set the desired save location and specify the zip file name consisting of a four-character prefix, a four-digit sequence number that automatically increments every time a backup is performed, and a three character suffix indicating the group of data contained in the backup. Backups can also be started from a toolbar button, where you specify which of the three data group types will be saved. The toolbar button will have a letter matching which type was selected.

You may choose not to require exclusive access to these backups if these need to be done during the day without all other users exiting Adagio. Another time you can make a data backup is immediately before performing key functions that can't typically be undone easily. For each function, identify whether a backup will never or always be done, or that the user has a choice to make the backup, which will add an extra button to the screen and the duration of the last backup, so you know how much extra time this will take.

Specify the number of these automatic backups, up to 99, where the oldest is overwritten when this maximum number is reached. These file names will be different than the others: “AUTOBACK” with the program code as a prefix, the backup number, and the group of data contained within. When you want to make a backup, either from the file menu, or the toolbar button, choose the data to backup. Whichever you choose, a screen appears to confirm the zip file name, save location, and files to backup before proceeding. All indicated data files will be zipped, not just an incremental backup of files that have changed from the last backup date. If other users have company data open, not having exclusive access may mean not all files are backed up. If this happens, then missed files will be listed on the errors tab. After a successful backup, a message will appear with the number of files zipped.

There are other places when data backups can be created. When converting data as part of a program upgrade, you might choose to make a backup prior to proceeding. An option in the company profile allows creating a program data zip immediately after a clean data integrity check, or just before a rebuild.

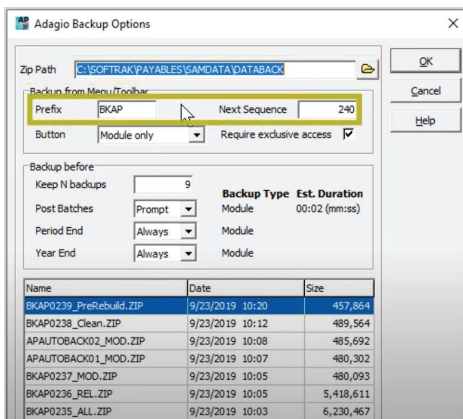
Data backups can be automated, unattended, and overnight, in conjunction with Adagio Console, on its own or as part of a sequence before or after other regular processes in various modules. Backups can also be automated through Adagio DataCare, which can create two copies of the backup in separate locations, with password protection, and retain a given number of backups with the oldest one replaced. Also, in addition to the data, you may optionally choose to backup all files in the data directory, whether or not they are data files, and include files from other specified folders such as invoice PDFs or custom reports, along with subfolders of the selected directories, and wildcards to select only particular file types.

Guard against unexpected problems with your company data by making a regular backup. **If you'd like to add Adagio Console or DataCare to your backup routine, need help with a data restore, or just need help establishing good backup practices, give us a call or send us an email.**

Recent Upgrades

The following upgrades have been released by Softrak since the beginning of this year:

- PurchaseOrders 9.3B
- OrderEntry 9.3B
- Payables 9.3C
- Ledger 9.3B
- Inventory 9.3A
- Receivables 9.3B
- BankRec 9.3A
- Invoices 9.3B
- FX 9.3B
- SalesCQ 9.3A



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Adagio & Office 356/64-bit

Question: We are running Office 365 in 32-bit mode. Our IT Technician wants us to migrate up to the 64-bit version of Office. Will there be any issues with Adagio should we go ahead with this?

Answer: We have been using Office 365 64-bit for years now without any problem, and Softrak has confirmed its compatibility. Upgrade away!

PO Cost Tracking by Vendor

Question: When entering a PO, we would like the cost of an item to default to the most recent cost for that specific vendor. In other words, they would like the system to store costs by vendor, not unlike what OrderEntry can do using Alternate Price Lists.

Do you have ideas on how to go about doing that?

Answer: You can use the IC Alternative price lists in PurchaseOrders to do this. In the Company profile, on the Integration tab, there are options that you can use to track the item cost by vendor:

- Use IC alternative price list
- Update price list cost amount

IC Units Sold by Location

Question: Is there data I can pull into GridView that shows me the number of units sold per location?

I have the totals of all the locations combined, but I would like details by location. I am looking to import minimum and maximums based off of these numbers by location. I know I can create a Transactions History View, but I'm hoping there is a simpler way.

Answer: There is. If you have SalesAnalysis you can pull Sales by location into GridView.

Reset Starting Check Number

Question: We got a new batch of checks starting at 300000, but we had to discard the whole batch because it was defective.

Our new batch of checks will start at 10000 and we are wondering where to reset the starting check number back to 10000.

Answer: In Payables, select Edit | Banks and on the Series tab you can change the Next Check Number.

Pay Two Invoices With One Check

Question: How would I print a batch of bills in Payables so that two invoices from the same vendor can be paid by one check?

Answer: Firstly, make sure the "Print one check per invoice" box is unchecked under the Accounting tab of Vendor Maintenance.

Then you can create a manual check batch entry and select both invoices for payment for that vendor. Or create a System Check run (Print/Post Checks and Advices) to generate a check for the vendor that would select these and other invoices.

There are training videos available on Softrak's website, accessible from the Resources menu and the Video Gallery area, to see how certain functions like this can be done for either System Check Processing or Manual Check Batches.

Financial Reporter Page Header

Question: I have a statement in Financial Reporter that goes over one page. I want to repeat the first 7 rows at the top of every page. How do I do that? Some of them are column headings so I can't really do it in the Header/Footer section.

Answer: If you multi-select the first 7 rows and set them to Freeze, then not only will they be frozen for scrolling but they will also print at the top of every page. Note you have to select all 7 rows to freeze, not just the 7th row. This is different from Excel.

The same goes for freezing left-side columns and having them print on the left of every page for wide statements, though this scenario is less common.

You can find more tips like this in the Softrak Technical Support Forum at www.softrak.com through the Client Portal.