



sage Production  
Management

# **Sage Inventory Requirements Planning 2019.2.1**

## **Installation Guide**

Version 6.10.2.01

January 2020

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Scanco Software, LLC  
1000 N Tamiami Trail  
Suite 201  
Nokomis, FL 34275

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# Introduction to Sage Inventory Requirements Planning

## About this Guide

This guide provides the information necessary for installing Sage Inventory Requirements Planning.

## Important Information

Read this guide completely before installing Sage Inventory Requirements Planning version 6.10.2.0.1. The Sage Inventory Requirements Planning 6.10.2.0.1 installation includes Sage Inventory Requirements Planning and Sage 100 Standard, Advanced or Premium modified programs. Before installing Sage Inventory Requirements Planning 6.10.2.0.1, install and register Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium 2019 with Product Update 2.

Please refer to the Sage 100 Installation and System Administrator's Guide for information on installing Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium and Sage 100 2019 Product Update 2.



**Note:** Please contact your authorized Sage Inventory Requirements Planning partner or the Sage Support department at 866-996-7243 or <https://customers.sagenorthamerica.com> for assistance.

## Required Sage 100 Modules

The following Sage 100 modules are required to be installed and activated in order to use Sage Inventory Requirements Planning.

- Library Master,
- Common Information,
- Inventory Management, and
- Purchase Order, or
- Production Management

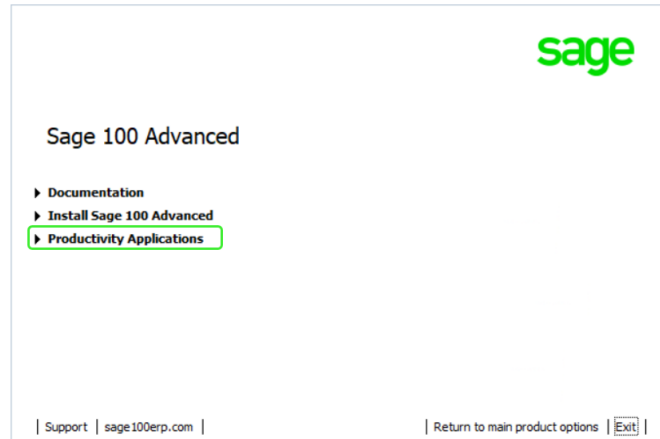
# Sage Inventory Requirements Planning Pre-Installation Checklist

Complete the following pre-installation checklist prior to installing Sage Inventory Requirements Planning 6.10.2.0.1 to ensure a successful installation.

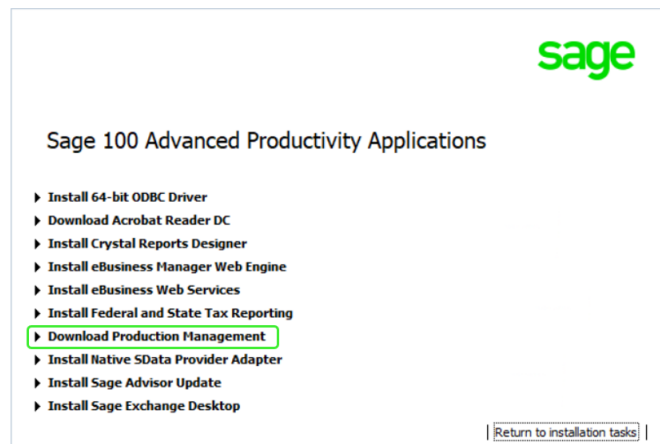
- ❑ Do **not** install Sage Inventory Requirements Planning 6.10.2.0.1 when custom modifications exist on Sage modified modules. Custom modifications must be retrofitted to the current Sage 100 version. Please contact your Sage or Sage Inventory Requirements Planning partner for information on how to obtain a quote for custom modifications to be retrofitted to Sage 100 2019 with Sage Inventory Requirements Planning 6.10.2.0.1.
- ❑ Do **not** install Sage Inventory Requirements Planning 6.10.2.0.1 when extended solutions or third-party products are installed on the Sage 100 system. Please contact your Sage Inventory Requirements Planning partner or the Sage Support department at 866-996-7243 or <https://customers.sagenorthamerica.com> for information on evaluating extended solutions or third-party software.
- ❑ Confirm that the Sage 100 installed version is 6.10.2.0 for the Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium system. Access Help menu > About Sage to review the currently installed Sage 100 version. To review additional information on the currently installed Sage 100 system in the Sage 100 System Information window, select File menu > Run. Type \*info in the Program field. Select the OK button.
- ❑ Backup the entire Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium system, including programs and data files, after all data entry files are updated, and before installing Sage Inventory Requirements Planning 6.10.2.0.1.
- ❑ Download the Sage Inventory Requirements Planning 6.10.2.0.1 installation file and specify registration information from <http://info.scanco.com/prod-mgmt-downloads> The Sage Inventory Requirements Planning downloads page can be accessed from the Sage 100 2019 installation wizard.
  1. From the Sage 100 2019 installation Autorun screen, click a version of Sage 100.



2. From the Installation Tasks menu, click Productivity Applications.



3. Click Download Production Management to access the Sage Inventory Requirements Planning downloads page.




# **Sage Inventory Requirements Planning 6.10.2.0.1 Installation Checklists**

## **Sage Inventory Requirements Planning without Production Management**

- ❑ Complete the Sage Inventory Requirements Planning 6.10.2.0.1 pre-installation checklist.
- ❑ Install Sage 100 2019. Refer to the Sage 100 2019 Installation and System Administrator's Guide.
- ❑ Install Product Update 2 for Sage 100 2019.
- ❑ Run the Sage 100 workstation setup process on all applicable workstations. Refer to the Sage 100 2019 Installation and System Administrator's Guide.
- ❑ Install Sage Inventory Requirements Planning 6.10.2.0.1. Refer to the Installing Sage Inventory Requirements Planning section on page 9.
- ❑ If hot fixes are available on the Sage Inventory Requirements Planning Downloads page for Sage Inventory Requirements Planning version 6.10.2.0.1, install Sage Inventory Requirements Planning 6.10.2.0.1 hot fixes. Refer to the Sage Inventory Requirements Planning Hot Fixes section on page 16.
- ❑ Activate the required and optional Sage 100 modules and the Sage Inventory Requirements Planning module from Library Master Main menu > Company Information. Refer to the Activating Sage Inventory Requirements Planning section on page 13.
- ❑ Create and set up company data files for required and optional Sage 100 modules that integrate with Sage Inventory Requirements Planning. Refer to the Creating Company Data Files for Sage 100 Modules section on page 13.
- ❑ Run the data conversion process from Library Master Main menu > Company Information.
- ❑ Define role security for Sage Inventory Requirements Planning from Library Master Main > Role Maintenance.
- ❑ Register Sage Inventory Requirements Planning 6.10.2.0.1 from Library Master Setup > Scanco Product Registration. Refer to the Registering Sage Inventory Requirements Planning section on page 14.
- ❑ Verify the Sage 100 and Sage Inventory Requirements Planning versions by accessing Inventory Setup > About Inventory Requirements Planning. Refer to the About Inventory Requirements Planning section on page 16.

## Sage Inventory Requirements Planning with Production Management

- ❑ Complete the Sage Inventory Requirements Planning 6.10.2.0.1 pre-installation checklist.
- ❑ Install Sage 100 2019. Refer to the Sage 100 2019 Installation and System Administrator's Guide.
- ❑ Install Sage 100 2019 Product Update 2. Refer to the Sage 100 2019 Customer Upgrade Guide and the Sage 100 2019 Upgrade Checklist.
- ❑ Run the Sage 100 workstation setup process on all applicable workstations. Refer to the Sage 100 2019 Installation and System Administrator's Guide.
- ❑ Migrate and convert Sage 100 data to 2019 version 6.10.2.0. Refer to the Sage 100 2019 Installation and System Administrator's Guide.
- ❑ Install Sage Production Management 6.10.2.0.1. Refer to the installation check lists in the Sage Production Management Installation guide.
- ❑ If hot fixes are available on the Sage Production Management Downloads page for Sage Production Management version 6.10.2.0.1, install Sage Production Management 6.10.2.0.1 hot fixes. Refer to the Sage Production Management Installation guide.
- ❑ Install Sage Inventory Requirements Planning 6.10.2.0.1. Refer to the Installing Sage Inventory Requirements Planning section on page 9.
  -  **Warning:** Sage Inventory Requirements Planning 6.10.2.0.1 must be installed after Sage Production Management 6.10.2.0.1
- ❑ If hot fixes are available on the Sage Inventory Requirements Planning Downloads page for Sage Inventory Requirements Planning version 6.10.2.0.1, install Sage Inventory Requirements Planning 6.10.2.0.1 hot fixes. Refer to the Sage Inventory Requirements Planning Hot Fixes section on page 16.
- ❑ Back up all company data files before conducting the company conversion process.
- ❑ Activate the required and optional Sage 100 modules, if not already activated, and the Sage Inventory Requirements Planning module from Library Master Main menu > Company Information. Refer to the Activating Sage Inventory Requirements Planning section on page 13.
- ❑ Create and set up company data files for required and optional Sage 100 modules that integrate with Sage Inventory Requirements Planning. Refer to the Creating Company Data Files for Sage Modules section on page 13.
- ❑ Run the data conversion process from Library Master Main menu > Company Information.
- ❑ Define role security for Sage Inventory Requirements Planning from Library Master Main > Role Maintenance.
- ❑ Register Sage Inventory Requirements Planning 6.10.2.0.1 from Library Master Setup > Scanco Product Registration. Refer to the Registering Sage Inventory Requirements Planning section on page 14.
- ❑ Verify the Sage 100 and Sage Inventory Requirements Planning versions by accessing Inventory Requirements Planning Setup > About Inventory Requirements Planning. Refer to the About Inventory Requirements Planning section on page 16.
- ❑ Access the Custom Office Utilities Menu and run the update customized panels by selecting Custom Office Utilities menu > Update Customized Panels to Current Level. Review the placement of all user-defined fields. Refer to the Sage 100 2019 Customer Upgrade Guide and the Sage 100 2019 Upgrade Checklist.
- ❑ Reset all grids.
- ❑ Set up Inventory Requirements Planning options. Access the setup wizard from Inventory Requirements Planning > Setup > Inventory Requirements Planning Options.

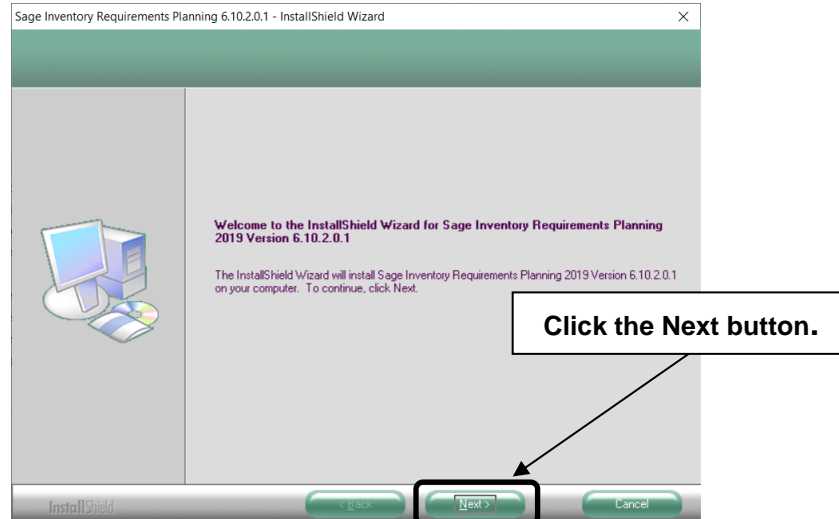


# Installing Sage Inventory Requirements Planning

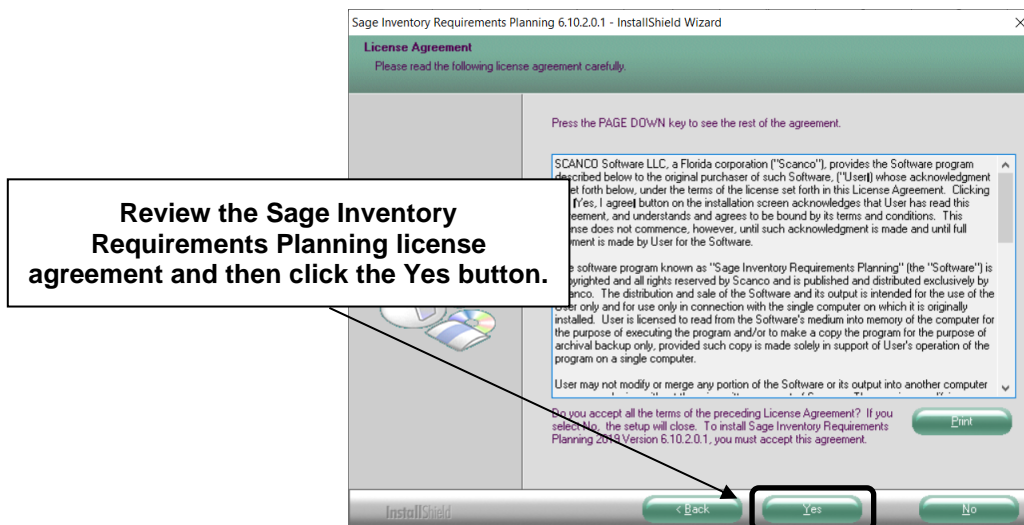
Conduct the following steps after Sage 100 2019 and Product Update 2 for Sage 100 2019 are installed successfully.

## How to Install Sage Inventory Requirements Planning

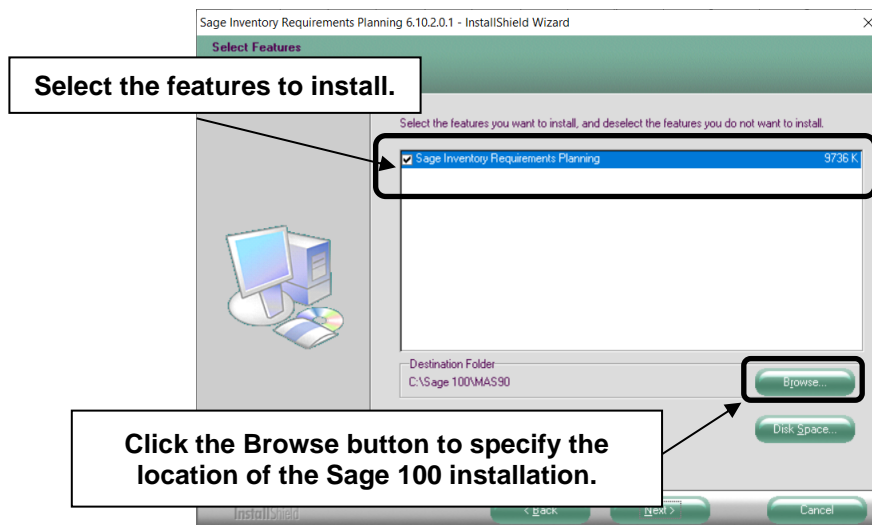
1. Download the IRP\_2019\_2\_1.exe file from the Sage Inventory Requirements Planning Downloads page at <http://info.scanco.com/prod-mgmt-downloads>.
2. Right click on the Sage Inventory Requirements Planning 6.10.2.0.1 executable file.
3. Select Run as administrator.



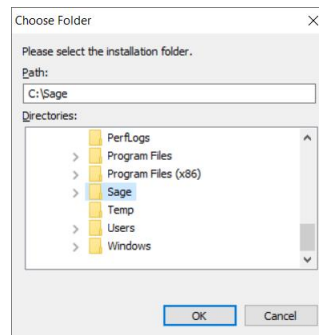
4. Select the Next button from the Sage Inventory Requirements Planning Welcome window.
5. Review the Sage Inventory Requirements Planning License Agreement.



6. Select the Yes button to agree to the Sage Inventory Requirements Planning License Agreement and to continue with the Sage Inventory Requirements Planning 6.10.2.0.1 installation process.
7. Select the Sage Inventory Requirements Planning check box to install Sage Inventory Requirements Planning 6.10.2.0.1.

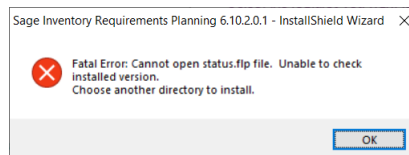


8. Accept the default location of Sage 100 or select the Browse button to specify the location of Sage 100. The Choose Folder window displays after the Browse button is selected.



Specify the location of Sage 100 in the Path field. Select the OK button to return to the Select Features window.

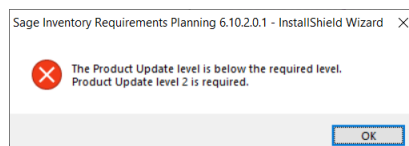
**Warning:** Sage Inventory Requirements Planning 6.10.2.0.1 must be installed to the same location where Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium is installed. When an invalid directory location is entered in the Destination Folder field found on the Select Features window, the following message displays.



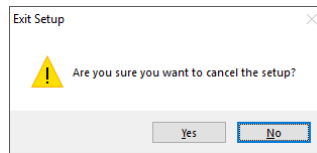
Select the OK button and modify the location where Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium is installed.

9. Select the Next button from the Select Features window. The installed version of Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium is validated.

When the Sage 100 2019 with Product Update 2 version 6.10.2.0 has not been installed at the specified Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium location, the following message displays.

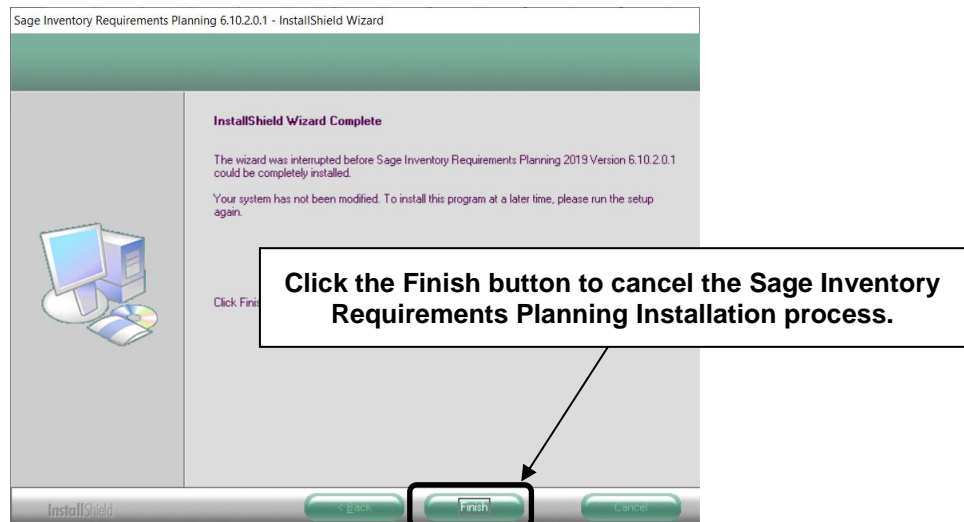


Select the OK button from the message. Select the Cancel button from the Select Features window. The following message displays.



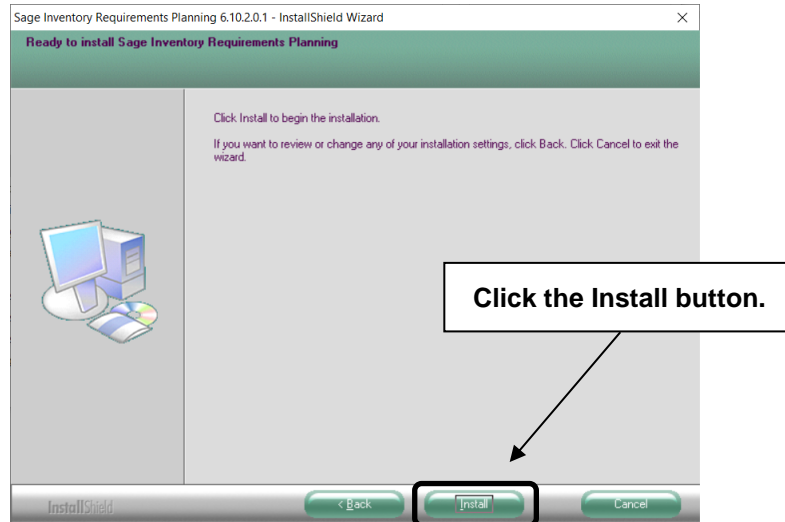
Select Yes in the message.

Select the Finish button from the InstallShield Wizard Complete window to cancel the Sage Inventory Requirements Planning 6.10.2.0.1 installation process.



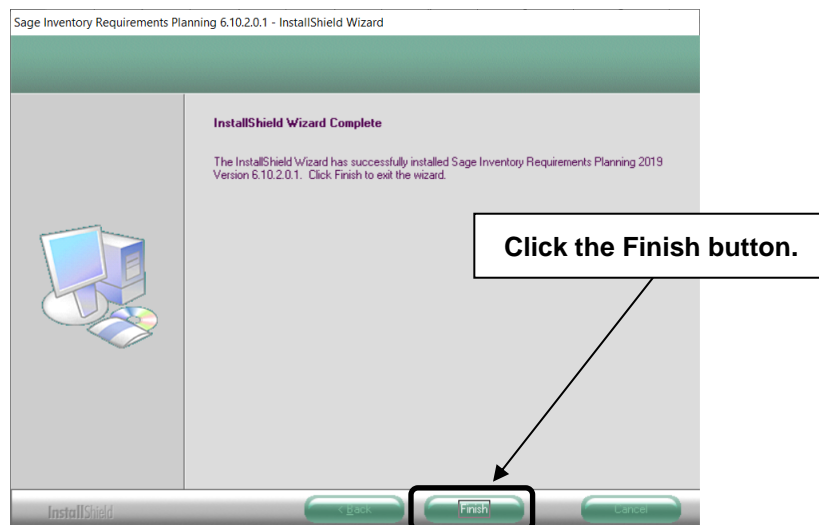
Install Sage 100 2019 Product Update 2 and then install Sage Inventory Requirements Planning 6.10.2.0.1.

10. Select the Install button from the following window to install Sage Inventory Requirements Planning.



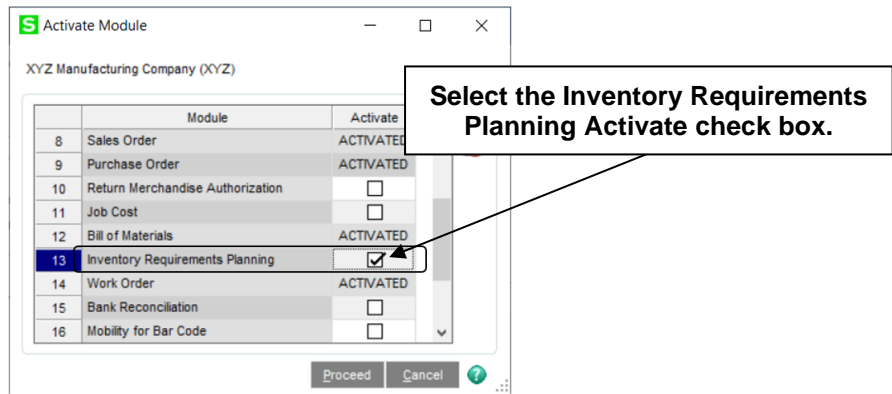
Select the Back button to return to the Select Features window. Select the Cancel button, select Yes in the message *Are you sure you want to cancel the setup?* and the Finish button from the InstallShield Wizard Complete window to cancel the Sage Inventory Requirements Planning 6.10.2.0.1 installation process.

11. Select the Finish button from the InstallShield Wizard Complete window to complete the Sage Inventory Requirements Planning 6.10.2.0.1 installation process.



## Activating Sage Inventory Requirements Planning

1. Access Library Master Main menu > Company Maintenance.
2. Enter the appropriate company code in the Company Code field.
3. Select the Activate button.
4. Select the Inventory Requirements Planning Activate check box.

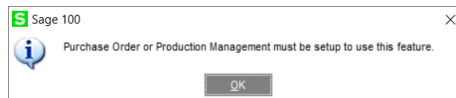


5. Select the Proceed button.

## Creating Company Data Files for Required Sage 100 Modules

Company data files must be created prior to accessing Sage Inventory Requirements Planning tasks after Sage Inventory Requirements Planning is installed on an existing Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium installation or after a new company has been created. Some Sage 100 modules are required to be installed in order to utilize Sage Inventory Requirements Planning. General Ledger, Common Information, and Inventory Management data files must be created prior to creating Sage Inventory Requirements Planning company data files. Purchase Order or Production Management data files must be created prior to creating Sage Inventory Requirements Planning company data files.

The following messages display when a Sage Inventory Requirements Planning task is accessed before company data files are created for the Sage 100 Purchase Order or Production Management module.



Click OK to the message. Access any Sage 100 Common Information or Inventory Management module task to access the Setup Wizard. Complete the Purchase Order or Production Management module setup process and then access Inventory Requirements Planning Options to set up Sage Inventory Requirements Planning.

# Registering Sage Inventory Requirements Planning

## How to Obtain Sage Inventory Requirements Planning Registration

1. Access the Inventory Requirements Planning Downloads page <http://info.scanco.com/prod-mgmt-downloads>



1. Scroll down and click on Registration File Form.


A screenshot of the 'Software Downloads Section'. On the left is a sidebar with a list of download categories: 'Production Management Downloads', 'Inventory Requirements Planning Downloads', 'Mobility for Manufacturing (MFG100) & Shop Floor Extension Downloads', 'Registration File Form' (highlighted in red), and 'Hot Fixes (PM & IRP)'. The main content area is titled 'Production Management Registration File Request Form'. It includes the instruction 'Please use the form below to request your Sage Production Management Registration File.' and a form with fields for 'Company name\*', 'Phone number', 'Company contact name\*', and 'Primary contact email\*'. A note states '(Production Management registration file will be sent to this address)'. At the bottom, there is a checkbox for 'Select this box if you are a Sage reseller'.

2. Enter the required information in the registration form. Fields noted with an asterisk (\*) are required.
3. Select the Inventory Requirements Planning - IRP check box or boxes for the products being registered.

Which modules do you need a registration file for?

- ☐ Production Management – Make to Stock
- ☒ Inventory Requirements Planning
- ☐ Mobility for Manufacturing
- ☐ Shop Floor Users/Devices

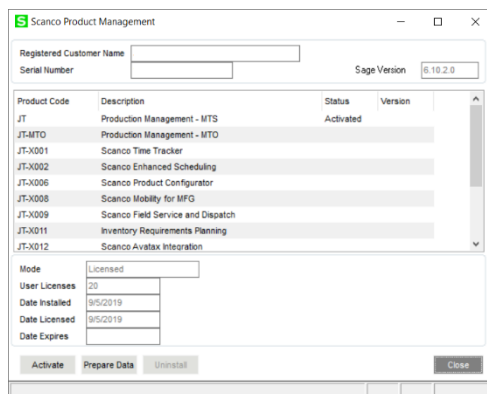
4. Select the Submit button.

 **Note:** Please allow 24 business hours for processing Inventory Requirements Planning registration requests. The Inventory Requirements Planning registration file is sent to the email specified in the Primary Contact Email field on the Inventory Requirements Planning Registration form.

## How to Register Sage Inventory Requirements Planning

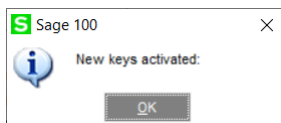
1. Access Library Master Setup menu > Scanco Product Registration.

 **Note:** Registration information is obtained when Sage Inventory Requirements Planning is downloaded from the Sage Inventory Requirements Planning Downloads page.

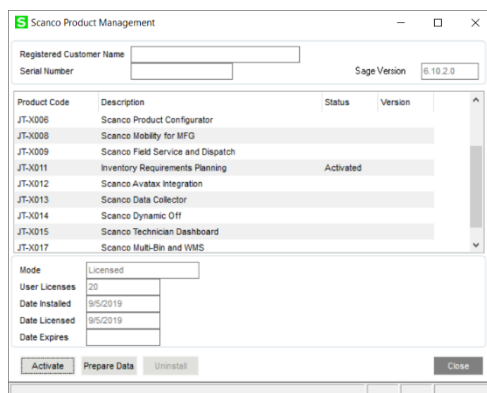


Product Code	Description	Status	Version
JT	Production Management - MTS	Activated	
JT-MTO	Production Management - MTO		
JT-X001	Scanco Time Tracker		
JT-X002	Scanco Enhanced Scheduling		
JT-X006	Scanco Product Configurator		
JT-X008	Scanco Mobility for MFG		
JT-X009	Scanco Field Service and Dispatch		
JT-X011	Inventory Requirements Planning	Activated	
JT-X012	Scanco Avatax Integration		

2. Verify the correct Sage 100 Serial number and User Licenses displays.
3. Select the Activate button.
4. Select OK in the New keys activated. message.



5. Verify Activated displays in the Status field for the J/T-X011 Inventory Requirements Planning product code record.



Product Code	Description	Status	Version
JT-X006	Scanco Product Configurator		
JT-X008	Scanco Mobility for MFG		
JT-X009	Scanco Field Service and Dispatch		
JT-X011	Inventory Requirements Planning	Activated	
JT-X012	Scanco Avatax Integration		
JT-X013	Scanco Data Collector		
JT-X014	Scanco Dynamic Off		
JT-X015	Scanco Technician Dashboard		
JT-X017	Scanco Multi-Bin and WMS		

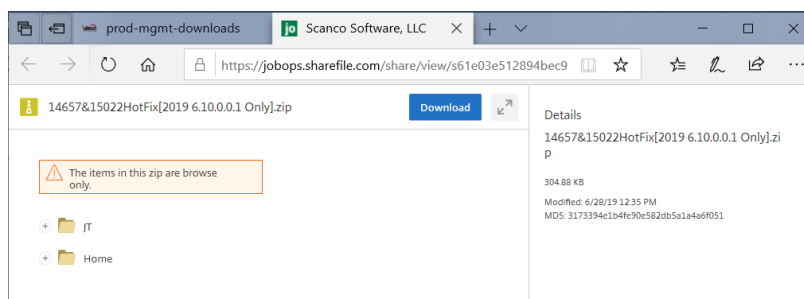
6. Select the Close button.

# Sage Inventory Requirements Planning Hot Fixes

Occasionally hot fixes are required to be installed after installing Sage Inventory Requirements Planning. Access Inventory Requirements Planning hot fixes from the Inventory Requirements Planning Downloads page <http://info.scanco.com/prod-mgmt-downloads>

## How to Install Sage Inventory Requirements Planning Hot Fixes

1. Access the Inventory Requirements Planning Downloads page <http://info.scanco.com/prod-mgmt-downloads>
1. Scroll down to the Inventory Requirements Planning Hot Fix section or click on the Hot Fixes hyperlink
2. Find the section for the current Inventory Requirements Planning version.
3. Click on a hot fix link to be directed to the download file.



4. Click on the Download button.
5. Specify the location to download the hot fix.
6. Extract the hot fix file to the MAS90 directory where Sage 100 and Inventory Requirements Planning are installed.

**Warning:** If the hot fix zip file is extracted to a location other than the MAS90 directory, the hot fix program(s) must be copied to the file location specified in the hot fix zip file.

7. Select to replace the file(s) in the destination if the hot fix file was extracted to the MAS90 directory where Sage 100 and Inventory Requirements Planning are installed. The hot fix program(s) is now located in the correct directory in the Sage 100 and Inventory Requirements Planning installation.
8. Review the document included in the hot fix download file. Descriptions and instructions are included in this documentation.

## About Inventory Requirements Planning

Use the About Inventory Requirements Planning window to review the current Sage 100 and Inventory Requirements Planning version numbers. The information available in the About Inventory Requirements Planning window is also used when contacting Sage Support.

Access this window from Inventory Requirements Planning Setup menu > About Inventory Requirements Planning.



Select the OK button to close the About Inventory Requirements Planning window.