sage Production Management

Sage Production Management 2019.2.1

Installation Guide

Version 6.10.2.01

January 2020

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Introduction to Sage Production Management

Sage Production Management gives discrete make to stock manufacturers and fabricators the tools they need to achieve visibility into their entire production process. By centralizing the production process in a way that is tightly integrated with Sage 100, assemblers, manufacturers, and fabricators always know their costs, the status of items, and the material quantities required to meet demand.

About this Guide

This guide provides the information necessary for installing Sage Production Management.

Important Information

Read this guide completely before installing Sage Production Management version 6.10.2.0.1. The Sage Production Management 6.10.2.0.1 installation includes Sage Production Management and Sage 100 Standard, Advanced or Premium modified programs. Before installing Sage Production Management 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 Production Management partner or the Sage Support department at 866-996-7243 or https://customers.sagenorthamerica.com for assistance.

Required Sage 100 Modules

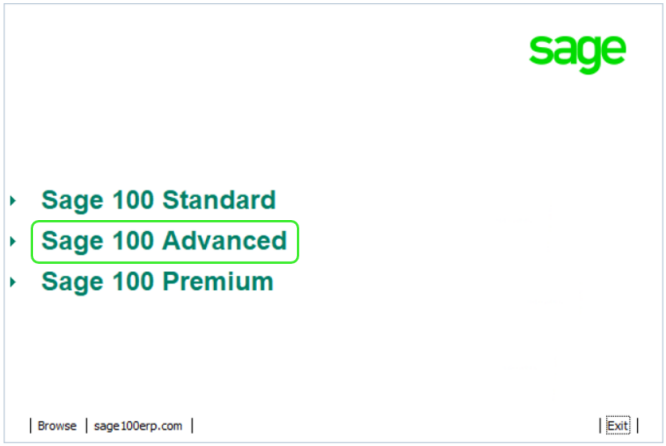
The following Sage 100 modules are required to be installed and activated in order to use Sage Production Management.

- Library Master
- Common Information
- General Ledger
- Inventory Management

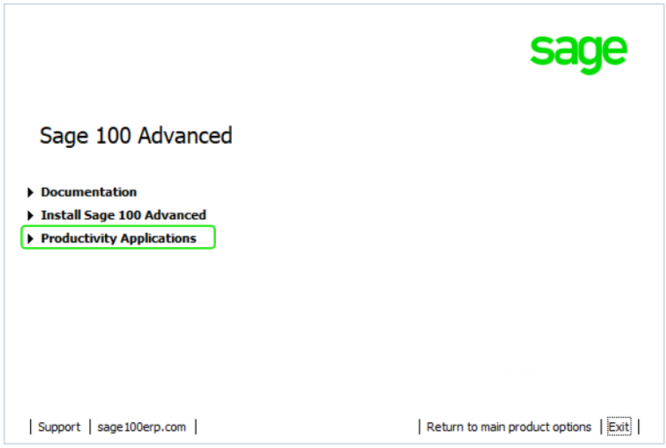
Sage Production Management Pre-Installation Checklist

Complete the following pre-installation checklist prior to installing Sage Production Management 6.10.2.0.1 to ensure a successful installation.

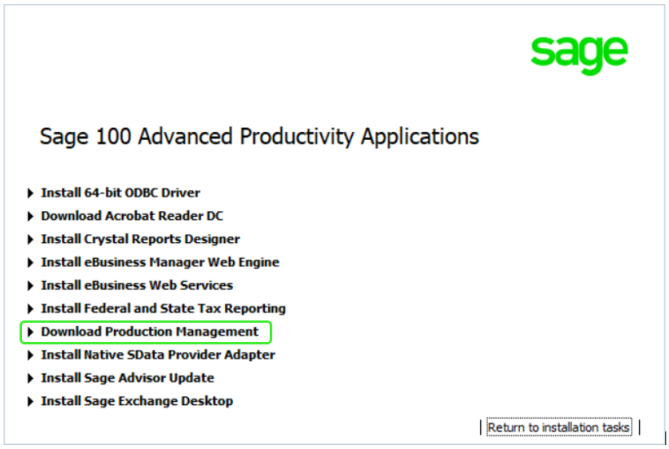
- ☐ Do ***not*** install Sage Production Management 6.10.2.0.1 when custom modifications exist on Sage modified modules. Custom modifications must be retrofitted to the current Sage 100 version. Please contact your Sage or Sage Production Management partner for information on how to obtain a quote for custom modifications to be retrofitted to Sage 100 2019 with Sage Production Management 6.10.2.0.1.
- ☐ Do ***not*** install Sage Production Management 6.10.2.0.1 when extended solutions or third-party products are installed on the Sage 100 system. Please contact your Sage Production Management 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 Production Management 6.10.2.0.1.
- ☐ Download the Sage Production Management 6.10.2.0.1 installation file and specify registration information from http://info.scanco.com/prod-mgmt-downloads The Sage Production Management 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 Production Management downloads page.



Sage Production Management 6.10.2.0.1 Installation Checklists

New Installation of Sage 100 with Sage Production Management

- ☐ Complete the Sage Production Management 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 Production Management 6.10.2.0.1. Refer to the Installing Sage Production Management section on page 10.
- ☐ 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 Hot Fixes section on page 23.
- ☐ Activate the required and optional Sage 100 modules and the Sage Production Management module from Library Master Main menu > Company Information. Refer to the Activating Sage Production Management section on page 14.
- ☐ Create and set up company data files for required and optional Sage 100 modules that integrate with Sage Production Management. Refer to the Creating Company Data Files for Sage 100 Modules section on page 15.
- ☐ Run the data conversion process from Library Master Main menu > Company Information.
- ☐ Define role security for Sage Production Management from Library Master Main > Role Maintenance.
- ☐ Register Sage Production Management 6.10.2.0.1 from Library Master Setup > Scanco Product Registration. Refer to the Registering Sage Production Management section on page 16.
- ☐ Verify the Sage 100 and Sage Production Management versions by accessing Production Management Setup > About Production Management. Refer to the About Production Management section on page 24.

Upgrading Sage 100 with a New Installation of Production Management

- ☐ Complete the Sage Production Management 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 Installing Sage Production Management section on page 10.
- ☐ 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 Hot Fixes section on page 23.
- ☐ 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 Production Management module from Library Master Main menu > Company Information. Refer to the Activating Sage Production Management section on page 14.
- ☐ Create and set up company data files for required and optional Sage 100 modules that integrate with Sage Production Management. Refer to the Creating Company Data Files for Sage Modules section on page 15.
- ☐ Run the data conversion process from Library Master Main menu > Company Information.
- ☐ Define role security for Sage Production Management from Library Master Main > Role Maintenance.
- ☐ Register Sage Production Management 6.10.2.0.1 from Library Master Setup > Scanco Product Registration. Refer to the Registering Sage Production Management section on page 16.
- ☐ Verify the Sage 100 and Sage Production Management versions by accessing Production Management Setup > About Production Management. Refer to the About Production Management section on page 2424.
- ☐ 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 Production Management options using the Production Management Setup Wizard. Access the setup wizard from Production Management > Setup > Production Management Options.

Upgrading Sage 100 and Production Management

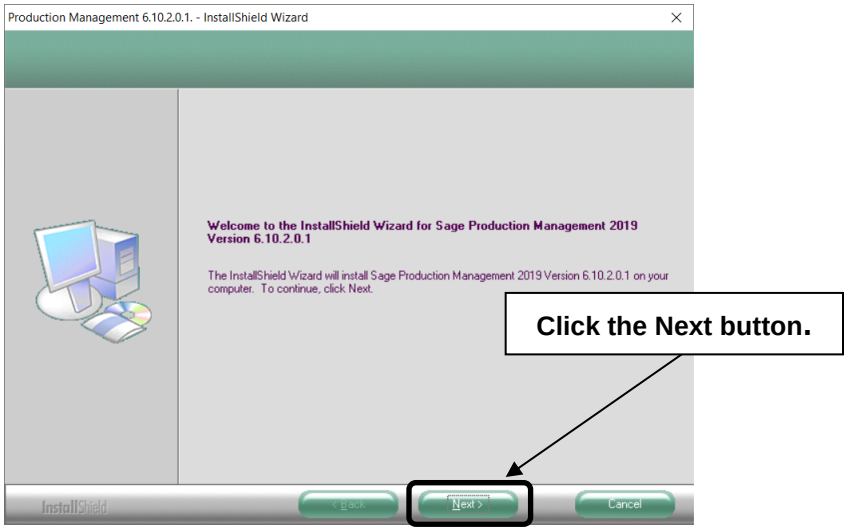
- ☐ Complete the Sage Production Management 6.10.2.0.1 pre-installation checklist.
- ☐ Install Sage 100 2019 Product Update 2. Refer to the Sage 100 2019 Customer Upgrade Guide and the Sage 100 2019 Upgrade Checklist.
- ☐ Install Sage Production Management 6.10.2.0.1. Refer to the Installing Sage Production Management section on page 10.
- ☐ 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 Hot Fixes section on page 23.
- ☐ Back up all company data files before proceeding to the company conversion process.
- ☐ Run the data conversion process from Library Master > Company Information.
- ☐ Verify the Sage 100 and Sage Production Management versions by accessing Production Management Setup > About Production Management. The Sage 100 version should display as 6.10.2.0 and the Sage Production Management version should display as 6.10.2.0.1. Refer to the About Production Management section on page 24.
- ☐ 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.

Installing Sage Production Management

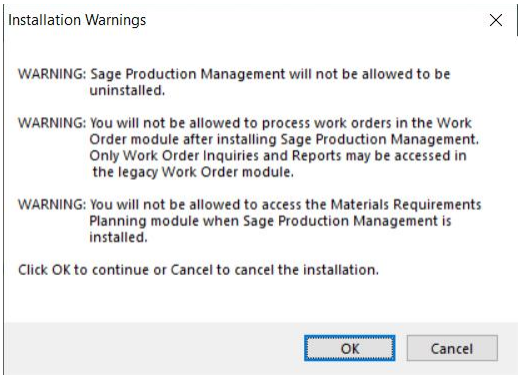
Conduct the following steps after Sage 100 2019 and Product Update 2 for Sage 100 2019 are installed successfully.

How to Install Sage Production Management

1. Download the ProductionManagement_2019_2_1.exe file from the Sage Production Management Downloads page at http://info.scanco.com/prod-mgmt-downloads.
2. Right click on the Sage Production Management 6.10.2.0.1 executable file.
3. Select Run as administrator.



4. Select the Next button from the Sage Production Management Welcome window.
5. Review the installation warning messages.

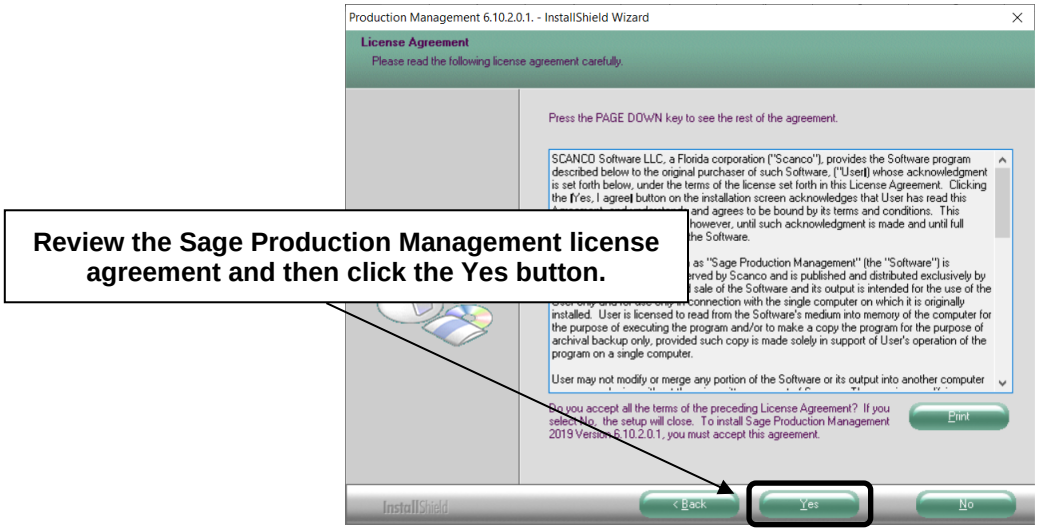


⚠ **Warning**: Sage Production Management will not be allowed to be uninstalled.

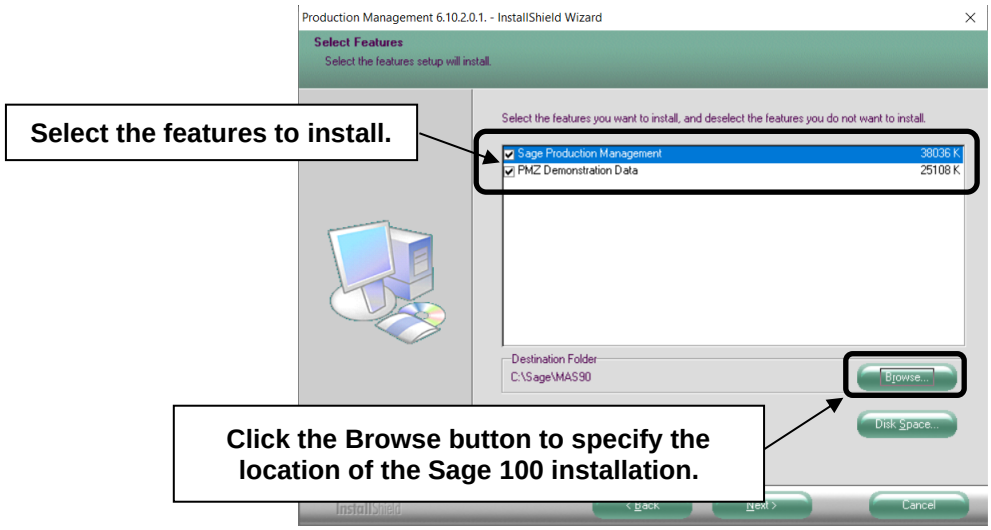
⚠ **Warning**: You will not be allowed to process work orders in the Work Order module after installing Sage Production Management. Only Work Order Inquires and Reports may be accessed in the legacy Work Order module.

⚠ **Warning**: You will not be allowed to access the Materials Requirements Planning module when Sage Production Management is installed.

6. Select OK to continue the installation process or Cancel to not install Sage Production Management.
7. Review the Sage Production Management License Agreement.

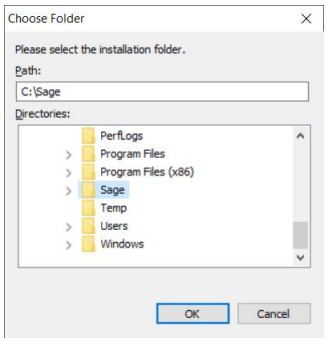


8. Select the Yes button to agree to the Sage Production Management License Agreement and to continue with the Sage Production Management 6.10.2.0.1 installation process.
9. Select the Sage Production Management check box to install Sage Production Management 6.10.2.0.1. Select the PMZ Demonstration Data check box to install Sage Production Management 6.10.2.0.1 demonstration data. Clear a check box to not install Sage Production Management 6.10.2.0.1 or the PMZ demonstration data.



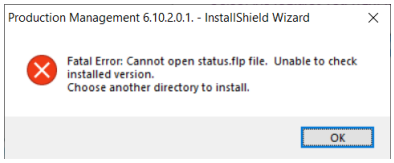
10. Accept the default location of Sage 100 or select the Browse button to specify the location of Sage 100.

    The Choose Folder window displays after the Browse button is selected.



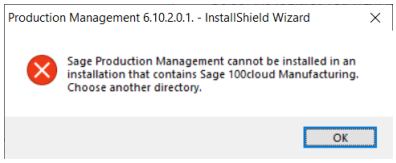
Specify the location of Sage 100 in the Path field. Select the OK button to return to the Select Features window.

Warning: Sage Production Management 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.

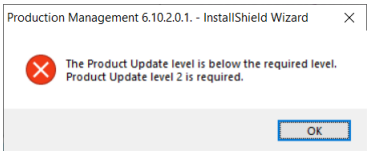
Warning: Sage Production Management 6.10.2.0.1 may not be installed in the same location where Sage 100cloud Manufacturing is installed. When an invalid directory location is entered in the Destination Folder field found on the Select Features window, the following message displays.



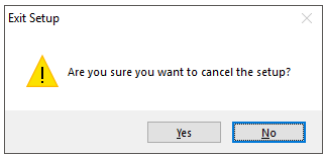
Select the OK button and then Cancel from the Select Features window.

11. 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.

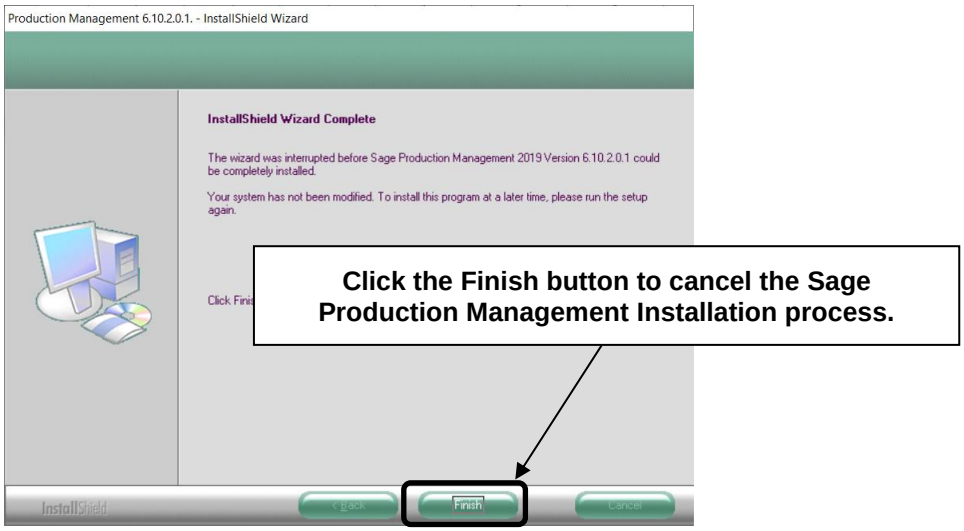


Select the OK button from the message. Select the Cancel button from the Select Features window. The following message displays.



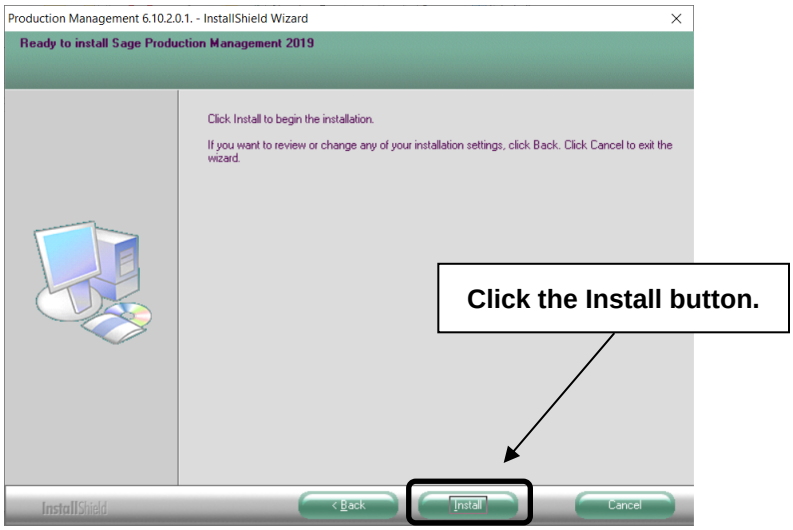
Select *Yes* in the message.

Select the Finish button from the InstallShield Wizard Complete window to cancel the Sage Production Management 6.10.2.0.1 installation process.



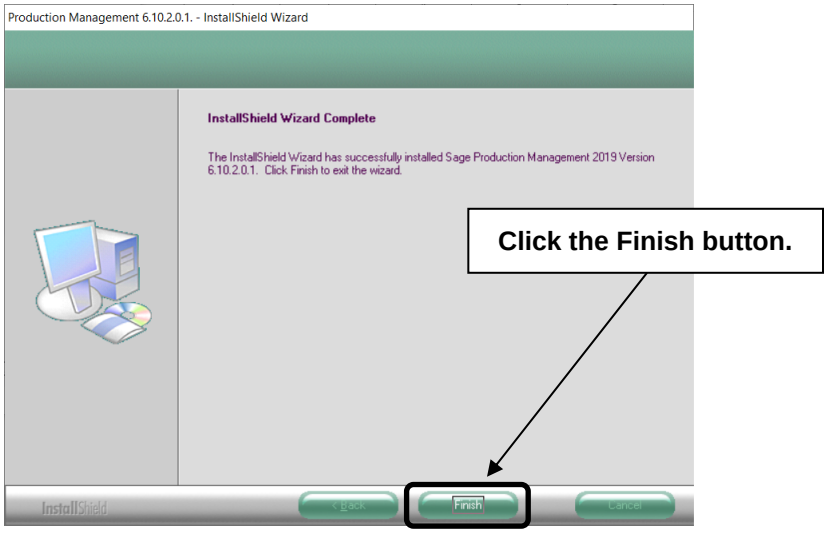
Install Sage 100 2019 Product Update 2 and then install Sage Production Management 6.10.2.0.1.

12. Select the Install button from the following window to install Sage Production Management.



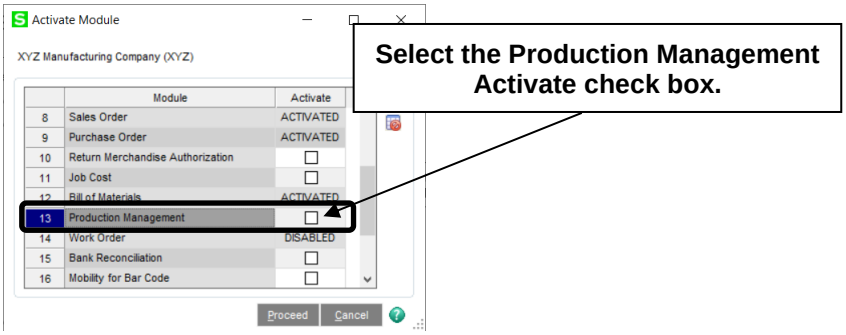
Select the Back button to return to the Select Features window. Select the Cancel button, select Yes in the message *Are you sure you want to cancel the setup?* and the Finish button from the InstallShield Wizard Complete window to cancel the Sage Production Management 6.10.2.0.1 installation process.

13. Select the Finish button from the InstallShield Wizard Complete window to complete the Sage Production Management 6.10.2.0.1 installation process.



Activating Sage Production Management

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 Production Management Activate check box.

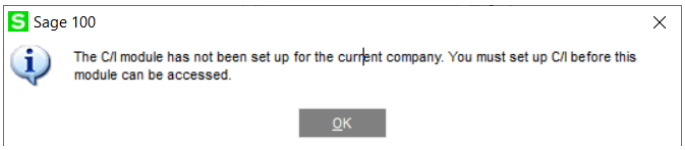


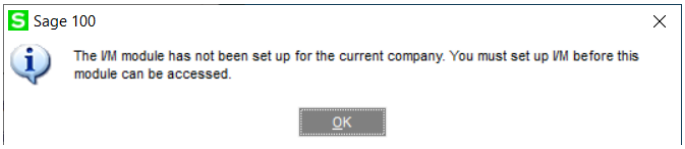
5. Select the Proceed button.

Creating Company Data Files for Required Sage 100 Modules

Company data files must be created prior to accessing Sage Production Management tasks after Sage Production Management 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 Production Management. General Ledger, Common Information, and Inventory Management data files must be created prior to creating Sage Production Management company data files.

The following messages display when a Sage Production Management task is accessed before company data files are created for the Sage 100 Common Information or Inventory Management modules.



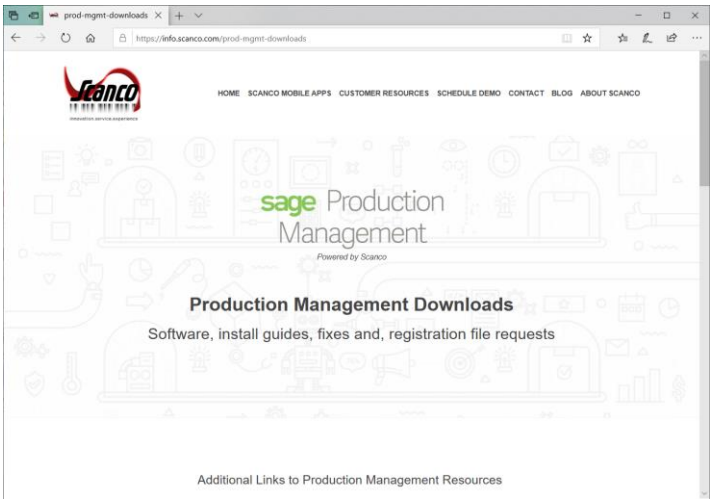


Click OK in the message. Access any Sage 100 Common Information or Inventory Management module task to access the Setup Wizard. Complete the Common Information or Inventory Management module setup process and then access Production Management Options to set up Sage Production Management.

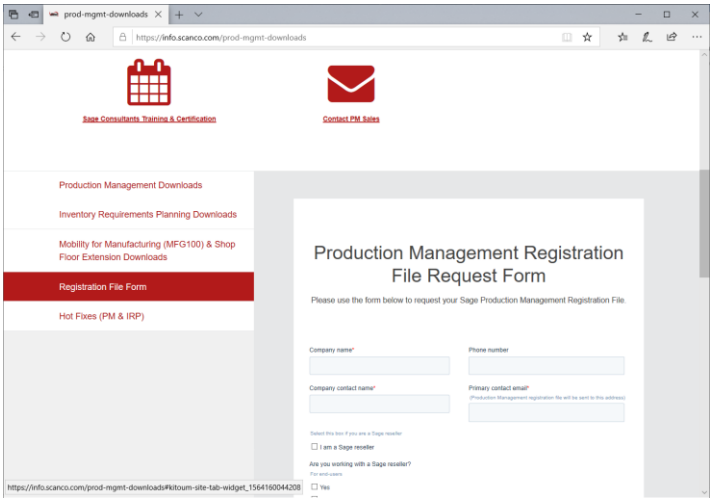
Registering Sage Production Management

How to Obtain Sage Production Management Registration

1. Access the Production Management Downloads page http://info.scanco.com/prod-mgmt-downloads



2. Scroll down and click on Registration File Form.



3. Enter the required information in the Sage Production Management Registration form. Fields noted with an asterisk (*) are required.
4. Select the Production Management – Make to Stock check box.

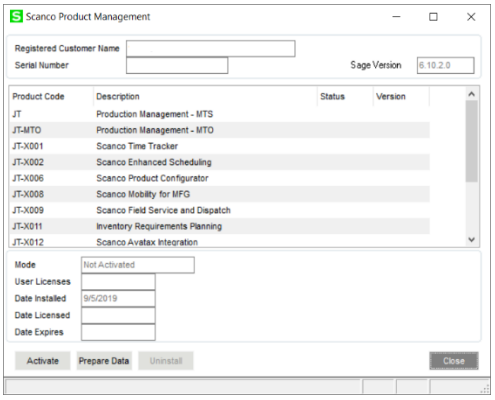
5. Select the Submit button.

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

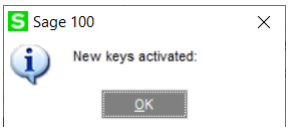
How to Register Sage Production Management

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

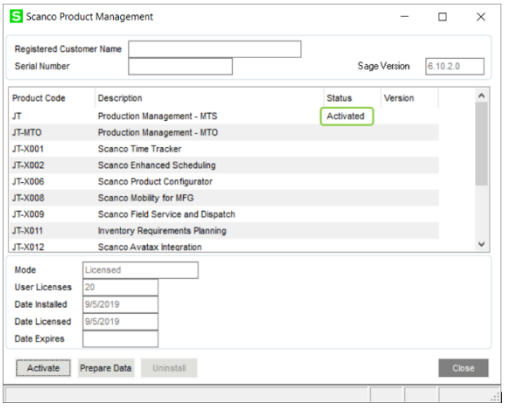
Note: Registration information is obtained when Sage Production Management is downloaded from the Sage Production Management Downloads page.



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 Production Management – MTS product code record.



6. Select the Close button.

Migrating to Sage Production Management 6.10.2.0.1

Migration Overview

The key to successfully migrating Sage 100 installations is that all modules installed on the Sage 100 migration source installation must also be installed on the Sage 100 migration target installation.

The Sage 100 Work Order, Material Requirements Planning and eBusiness Manager modules are not supported on the Sage 100 Premium platform. Removal of these modules is required from the Sage 100 migration source installation prior to migration. This includes removing the module in each company you wish to migrate to the Sage 100 migration target installation and removing the module from the source installation.

Warning: The Sage Production Management Convert Work Order Data utility currently does not convert Work Order history. Since removal of Work Order from the Sage 100 migration source installation is required before migrating to a Sage 100 Premium platform, in order to have access to this data after migration, it is recommended migrating to a Sage 100 Premium platform be deferred until this is available.

Since Sage Production Management can only be installed on Sage 100 2019, migration of Sage 100 2018 source installation to a Sage 100 2019 target installation must be accomplished ***before*** installing Production Management on the Sage 100 2019 target installation.

Note: Please contact your authorized Sage Production Management partner or the Sage Support department at 866-996-7243 or https://customers.sagenorthamerica.com for assistance.

Migration Steps

1. Perform standard migration of a Sage 100 2018 (or earlier) source installation to non-premium Sage 100 2019 target installation (*without Production Management installed*). This step includes installing Sage 100 2019 Product Update 2. Refer to the Sage 100 2019 Installation Guide for steps on how to perform a migration.
2. Install Sage Production Management on Sage 100 2019 target installation.
3. Access the Scanco Product Registration from the Library Master Setup Menu.
4. Click the Activate button to register Sage Production Management 6.10.2.0.1.
5. Access Company Maintenance from the Library Master Main Menu.
6. Select a Company Code.
7. Click the Convert button.
8. Select the Convert Data for All Companies check box.
9. Click the Proceed button.
10. Access Company Maintenance and activate Production Management for applicable companies.
11. Access Role Maintenance from the Library Master Main Menu to define Sage Production Management user security for each role.
12. For each company with Sage Production Management activated, access Production Management Setup menu > Production Management Options to access the Sage Production Management Setup Wizard.
13. Review and assign values to all fields in Production Management Options.

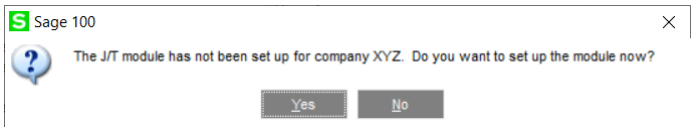
    Warning: Field values assigned in Production Management Options are retained during the Convert Work Order Data process and are not overwritten by values assigned in Work Order Options. Since Production Management Options present many different parameters, it is important to review and assign all fields prior to running the Convert Work Order Data process.
14. Access Production Management Utilities menu > Convert Work Order Data.

15. Run the Convert Work Order Data utility for each company with Production Management activated that includes Work Order data to be converted to Production Management.
16. Remove Sage 100 Work Order, Material Requirements Planning and eBusiness Manager modules from companies and non-Premium Sage 2019 installation with Production Management.
17. Create and setup Sage 100 2019 Premium target installation including the installation of Production Management.
18. Activate the Sage Production Management module.
19. The initial migration process will replace company, user and role data on the Premium target installation with the data from the source installation.
20. Migrate Sage 100 2019 non-Premium source installation to Sage 100 2019 Premium target installation.
21. Perform the conversion process for all companies on the target installation to transfer data from ProvideX tables to the SQL database.

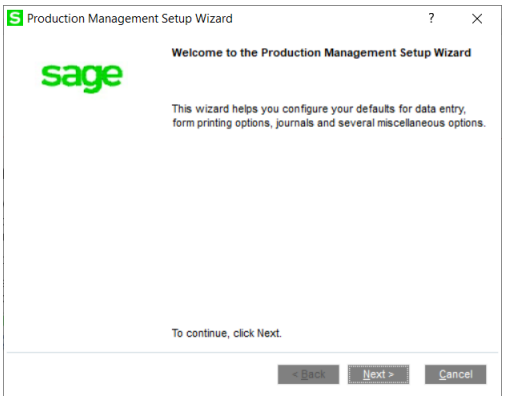
Sage Production Management Setup Wizard

The Sage Production Management module includes a Production Management Setup Wizard that must be performed to initiate the setup process.

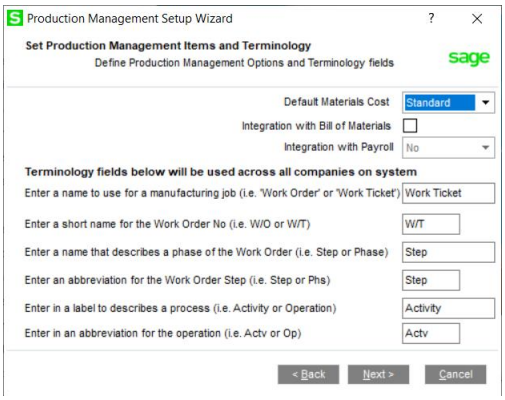
1. Access Production Management Setup > Production Management Options.
2. Select Yes in the message *The J/T module has not been set up for company ###. Do you want to set up the module now?*



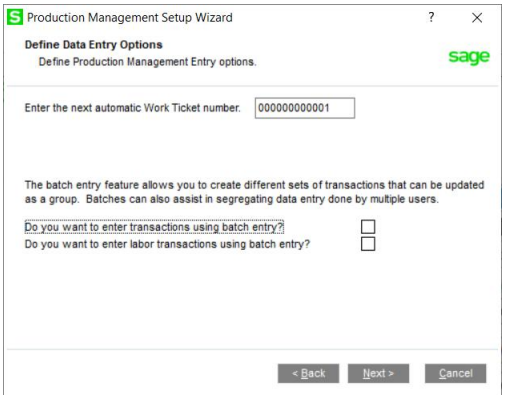
3. Select Next from the Production Management Setup Wizard Welcome window.



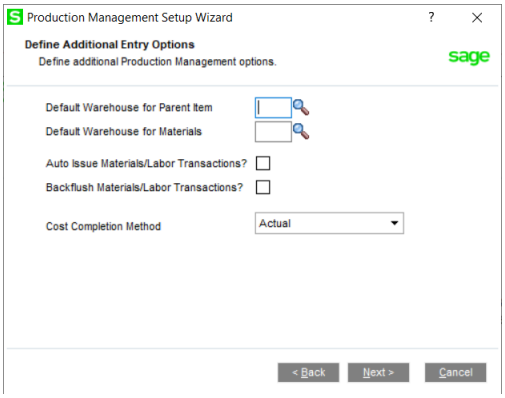
4. Specify the default materials cost value, integration settings and terminology.



5. Select the Next button.
6. Specify the next automatic work ticket number and the batch processing settings for Work Ticket Transaction Entry and Labor Entry.

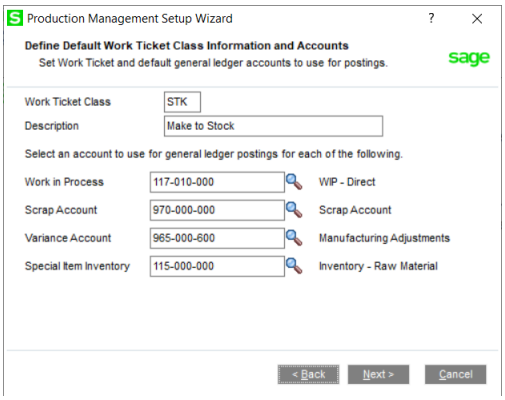


7. Select the Next button.
8. Optionally, specify a default warehouse code for finished goods and materials. Specify to allow auto issues and backflush transactions. Select a default cost completion method.

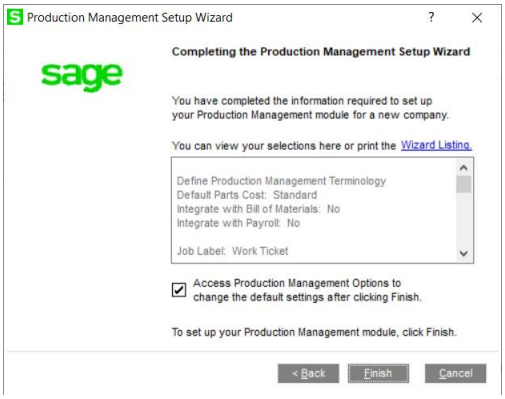


9. Select the Next button.
10. Type a work ticket class and description. Assign the work in process, scrap, variance and special item inventory account for the work ticket class.

Note: The work ticket class defined in this window is assigned the Default Make to Stock Work Ticket Class field in Production Management Options.



11. Select the Next button.
12. Review selected Production Management options from the Wizard Listing.
13. Select the Finish button.

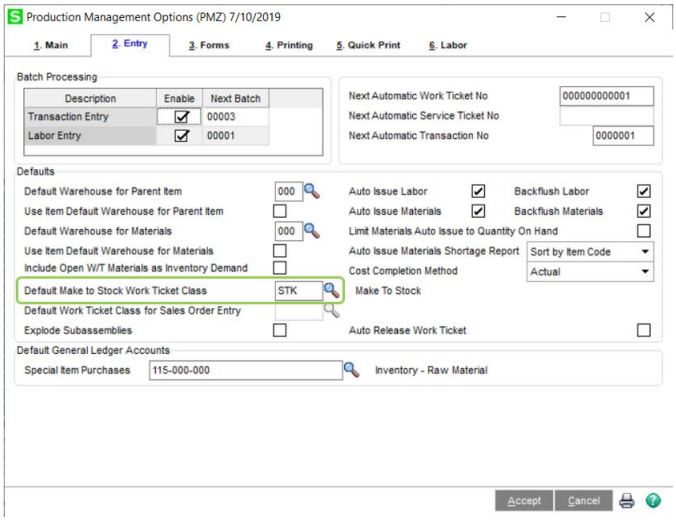


Converting Work Order Data to Sage Production Management

Sage Work Order data can be converted into Production Management data by using the Sage Production Management Convert Work Order Data utility.

1. Complete all steps on the Upgrading Sage 100 with a New Installation of Production Management check list.
2. If migrating to Sage 100 Premium, review and complete the necessary steps from the Migrating to Sage Production Management 6.10.2.0.1 section on page 14.
3. Follow the steps defined in the Sage Production Management Setup Wizard section on page 19.
4. Review and assign values to all fields in Production Management Options.

   Warning: Field values assigned in Production Management Options are retained during the Convert Work Order Data process and are not overwritten by values assigned in Work Order Options. Since Production Management Options present many different parameters, it is important to review and assign all fields prior to running the Convert Work Order Data process.



Note: A work ticket class must be assigned to the Default Make to Stock Work Ticket Class field in Production Management Options in order to run the Sage Production Management Convert Work Order Data utility.

5. From Work Ticket Class Maintenance, review information assigned to the default work ticket class created by the Sage Production Management Setup Wizard.

   Note: The default work ticket class assigned as the Default Make to Stock Work Ticket Class field in Production Management Options must exist in Work Ticket Class Maintenance in order to run the Sage Production Management Convert Work Order Data utility.

   Warning: Some parameter, such as General Ledger accounts and overhead settings assigned to a work ticket class in Work Ticket Class Maintenance cannot be changed after a work tickets is created from converted work orders.

6. Access Production Management Utility menu > Convert Work Order Data.

   Warning: The Sage Production Management Convert Work Order Data utility does not convert Work Order history.

7. Review messages in the task window.

   - The message *Warning: Production Management data is active.* displays when Sage Production Management data has been created prior to converting Work Order data to Sage Production Management data. This includes settings specified in Production Management Options and defined work ticket classes in Work Ticket Class Maintenance.
   - The message *Invalid or missing default Work Ticket Class.* displays when a work ticket class is not assigned to the Default Make to Stock Work Ticket Class field in Production Management Options. A work ticket class must be assigned to the Default Make to Stock Work Ticket Class field in Production Management Options in order to run the Sage Production Management Convert Work Order Data utility.
   - The message *Missing Work Ticket Class record required to convert Company*. displays when the default work ticket class assigned to the Default Make to Stock Work Ticket Class field in Production Management Options does not exist in Work Ticket Class Maintenance.

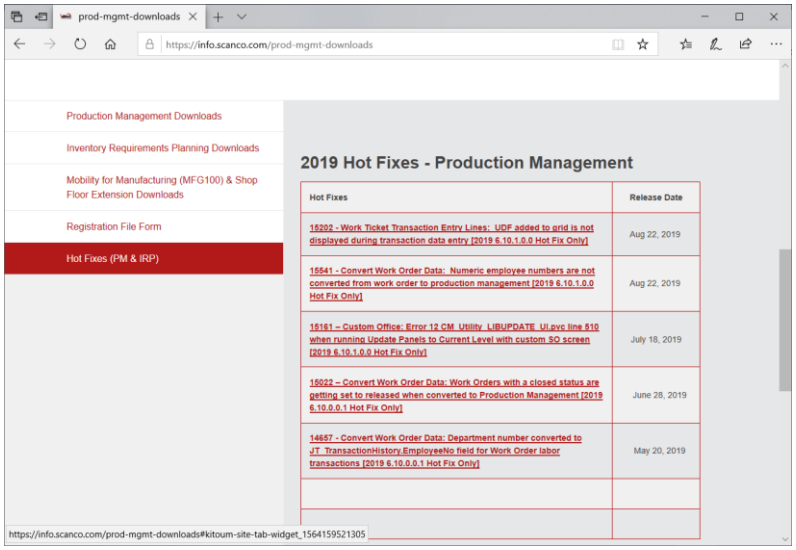
8. Select the Proceed button when the *Warning: Production Management data is active.* displays. Select the Cancel button to close the Convert Work Order Data utility window in order to specify or create a default make to stock work ticket class.
9. Select OK to the message *Work Order to Production Management conversion completed.* after Work Order data is converted to Production Management data
10. After the Convert Work Order Data utility completes, review converted Work Order data in Sage Production Management tasks.

Sage Production Management Hot Fixes

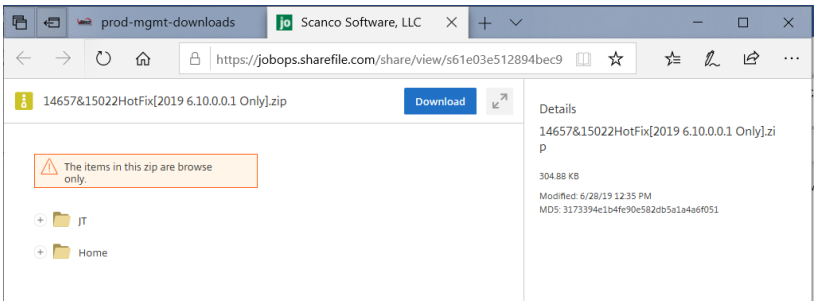
Occasionally hot fixes are required to be installed after installing Production Management. Access Production Management hot fixes from the Production Management Downloads page http://info.scanco.com/prod-mgmt-downloads

How to Install Sage Production Management Hot Fixes

1. Access the Production Management Downloads page http://info.scanco.com/prod-mgmt-downloads
2. Scroll down to the Production Management Hot Fix section or click on Hot Fixes (PM & IRP).

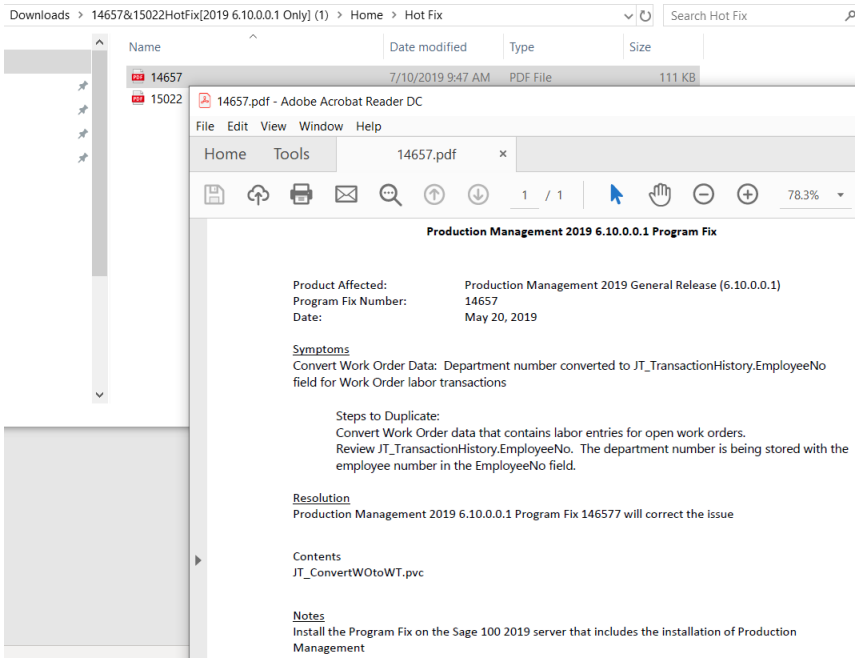


3. Find the section for the current Production Management version.
4. Click on a hot fix link to be directed to the download file.



5. Click on the Download button.
6. Specify the location to download the hot fix.
7. Extract the hot fix file to the MAS90 directory where Sage 100 and Production Management are installed.

   Warning: If the hot fix zip file is extracted to a location other than the MAS90 directory, the hot fix programs must be copied to the file location specified in the hot fix zip file.
8. Select to replace the files in the destination if the hot file was extracted to the MAS90 directory where Sage 100 and Production Management are installed. The hot fix program is now located in the correct directory in the Sage 100 and Production Management installation.
9. Review the document(s) included in the hot fix download file. Descriptions and instructions are included in this documentation.



About Production Management

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

Access this window from Production Management Setup menu > About Production Management.

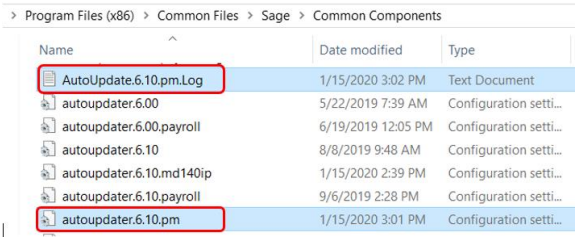
Select the OK button to close the About Production Management window.

Installing Online Help Files when Migrating to Version 6.10.2.0.1

When migrating to Production Management version 6.10.2.0.1, the following steps must be conducted to install the file layouts and updated online help files.

10. Before installing Production Management 19.2.1 version 6.10.2.0.1, remove the following two files from \Program Files (x86)\Common Files\Sage\Common Components

    - AutoUpdate.6.10.pm.Log.txt
    - Autoupdater.6.10.pm.ini



11. Install PM 19.2.1 according to the installation instructions in this guide.
12. Access Sage 100 to initiate the Sage workstation synchronization. The workstation synchronization process will then install the updated online help and file layouts files.