



sage Production
Management

Sage Inventory Requirements Planning 2020.2

Installation Guide

Version 6.20.2.0.0

May 2021

© Copyright 2021 All rights reserved. Production Management and Inventory Requirements Planning is a trademark of Scanco Software, LLC. Sage, the Sage logos, and the Sage product and service names mentioned herein are registered trademarks or trademarks of Sage Software, Inc., or its affiliated entities. All other trademarks are the property of their respective owners. The contents herein are summary in nature and subject to change without notification from Scanco Software, LLC. Scanco Software, LLC, accepts no responsibility for inadvertent errors or omissions.

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

Contents

Introduction to Sage Inventory Requirements Planning 4

About This Guide 4

Important Information 4

Required Sage 100 Modules 4

Sage Inventory Requirements Planning Pre-Installation Checklist 5

Sage Inventory Requirements Planning 6.20.2.0.0 Installation Checklists 7

New Installation of Sage 100 and Sage Inventory Requirements Planning 7

New Installation of Sage 100, Sage Inventory Requirements Planning, and Production Management 7

Upgrade of Sage 100 to 2020 with a New Installation of Inventory Requirements Planning 8

Upgrade of Sage 100 with a New Installation of Inventory Requirements Planning and Production Management 9

Upgrade of Sage 100 and Inventory Requirements Planning 10

Upgrade of Sage 100, Inventory Requirements Planning, and Production Management 11

Installing Sage Inventory Requirements Planning 12

How to Install Sage Inventory Requirements Planning 12

Activating Sage Inventory Requirements Planning 16

Creating Company Data Files for Required Sage 100 Modules 16

Registering Sage Inventory Requirements Planning 16

How to Obtain Sage Inventory Requirements Planning Registration 17

How to Register Sage Inventory Requirements Planning 18

Sage Inventory Requirements Planning Hot Fixes 18

How to Install Sage Inventory Requirements Planning Hot Fixes 19

Module Integration with Sage Inventory Requirements Planning 19

About Inventory Requirements Planning 20

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 6.20.2.0.0. The Sage Inventory Requirements Planning 6.20.2.0.0 installation includes Sage Inventory Requirements Planning and Sage 100 Standard, Advanced or Premium modified programs. Before installing Sage Inventory Requirements Planning 6.20.2.0.0, install and register Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium 2020.

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 2020.

 **Warning:** Install Sage Inventory Requirements Planning 6.20.2.0.0 into a parallel test Sage 100 environment. Performing a test upgrade or a test new install allows you to resolve issues that may occur during the live upgrade or live new install, reducing downtime and allows you to get a rough estimate of how long the upgrade process will take. Refer to the [Sage Knowledgebase article ID 101266](#) for more information. As not noted in the Sage Knowledgebase article before step 20, third party products must be re-installed after a migration.

 **Warning:** Sage Inventory Requirements Planning 6.20.2.0.0 may not be compatible with non-Scanco third party products. If third-party products that integrate with Sage product are used, check with the vendor of the third-party products to ensure the third-party product is fully compatible with this release. If other Sage products are integrated, check with your business partner or Sage to ensure that these components are compatible.

 **Warning:** Sage Inventory Requirements Planning 6.20.2.0.0 does not integrate with Sage Operations Management. Use the Component Exception Manager with Sage Operations Management.

 **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 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 6.20.2.0.0 to ensure a successful installation.

- ❑ Do **not** install Sage Inventory Requirements Planning 6.20.2.0.0 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 2020 with Sage Inventory Requirements Planning 6.20.2.0.0.
- ❑ Do **not** install Sage Inventory Requirements Planning 6.20.2.0.0 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 6.20.2.0 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.

 **Warning:** Install Sage Inventory Requirements Planning 6.20.2.0.0 into a parallel test Sage 100 environment. Performing a test upgrade or a test new install allows you to resolve issues that may occur during the live upgrade or live new install, reducing downtime and allows you to get a rough estimate of how long the upgrade process will take. Refer to the [Sage Knowledgebase article ID 101266](#) for more information. As not noted in the Sage Knowledgebase article before step 20, third party products must be re-installed after a migration.

- ❑ 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 6.20.2.0.0.
- ❑ Download the Sage Inventory Requirements Planning 6.20.2.0.0 installation file, documentation and registration information from <http://info.scanco.com/prod-mgmt-downloads>

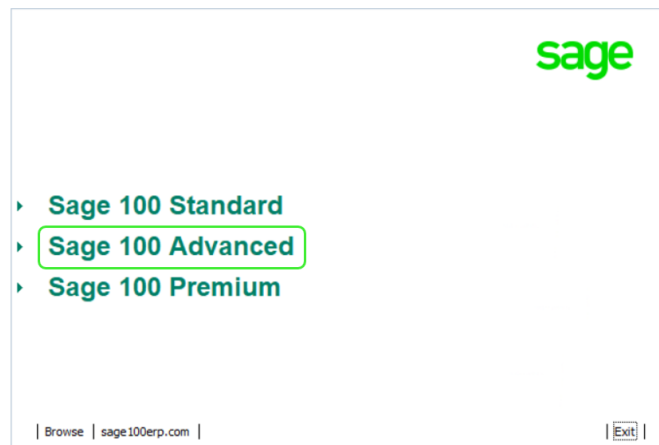
 **Warning:** A new registration file must be requested and activated

1. For a new installation of Sage Inventory Requirements Planning,
2. When a module or add on was recently purchased or previously not activated,
3. When the Sage 100 user count changes,
4. When migrating from a lower version, for example 2019 version 6.10.5.0 to 2020 version 6.20.2.0, or
5. When the subscription plan has expired or modified.

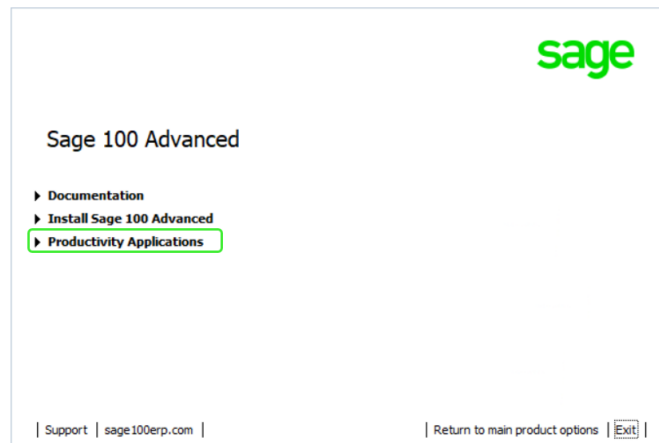
A new registration file is not required for service releases or product updates when a registration file was previously activated.

The Sage Inventory Requirements Planning downloads page can be accessed from the Sage 100 2020 installation wizard.

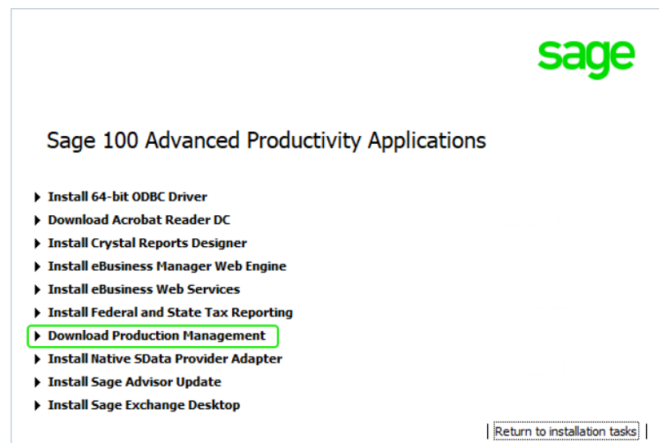
1. From the Sage 100 2020 installation Autorun screen, click a version of Sage 100.



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



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



Sage Inventory Requirements Planning 6.20.2.0.0 Installation Checklists

New Installation of Sage 100 and Sage Inventory Requirements Planning

- ❑ Complete the Sage Inventory Requirements Planning 6.20.2.0.0 pre-installation checklist. Refer to page 5.
- ❑ Install Sage 100 2020. Refer to the Sage 100 2020 Installation and System Administrator's Guide.
- ❑ Install Product Update 2 for Sage 100 2021.
- ❑ Run the Sage 100 workstation setup process on all applicable workstations. Refer to the Sage 100 2020 Installation and System Administrator's Guide.
- ❑ Install Sage Inventory Requirements Planning 6.20.2.0.0. Refer to Installing Sage Inventory Requirements Planning on page 12.
- ❑ If hot fixes are available on the Sage Inventory Requirements Planning Downloads page for Sage Inventory Requirements Planning version 6.20.2.0.0, install Sage Inventory Requirements Planning 6.20.2.0.0 hot fixes. Refer to Sage Inventory Requirements Planning Hot Fixes on page 18.
- ❑ Activate the required and optional Sage 100 modules and the Sage Inventory Requirements Planning module from Library Master Main menu > Company Information. Refer to Activating Sage Inventory Requirements Planning on page 16.
- ❑ Create and set up company data files for required and optional Sage 100 modules that integrate with Sage Inventory Requirements Planning. Refer to page 16.
- ❑ Define role security for Sage Inventory Requirements Planning and Scanco Product Registration from Library Master Main menu > Role Maintenance.
- ❑ Register Sage Inventory Requirements Planning 6.20.2.0.0 from Library Master Setup menu > Scanco Product Registration. Refer to Registering Sage Inventory Requirements Planning on page 16.
- ❑ Verify the Sage 100 and Sage Inventory Requirements Planning versions by accessing Inventory Setup menu > About Inventory Requirements Planning. Refer to page 20.
- ❑ Access Inventory Requirements Planning Setup menu > Inventory Requirements Planning Options to set up the Inventory Requirements Planning module.

New Installation of Sage 100, Sage Inventory Requirements Planning, and Production Management

- ❑ Complete the Sage Inventory Requirements Planning 6.20.2.0.0 pre-installation checklist. Refer to page 5.
- ❑ Install Sage 100 2020. Refer to the Sage 100 2020 Installation and System Administrator's Guide.
- ❑ Install Product Update 2 for Sage 100 2021.
- ❑ Run the Sage 100 workstation setup process on all applicable workstations. Refer to the Sage 100 2020 Installation and System Administrator's Guide.
- ❑ Install Sage Production Management 6.20.2.0.0. 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 6.20.2.0.0, install Sage Production Management 6.20.2.0.0 hot fixes. Refer to the Sage Production Management Installation guide.



Note: Sage Production Management may also be installed after installing Sage Inventory Requirements Planning.

- ❑ Install Sage Inventory Requirements Planning 6.20.2.0.0. Refer to Installing Sage Inventory Requirements Planning on page 12.

- ❑ If hot fixes are available on the Sage Inventory Requirements Planning Downloads page for Sage Inventory Requirements Planning version 6.20.2.0.0, install Sage Inventory Requirements Planning 6.20.2.0.0 hot fixes. Refer to Sage Inventory Requirements Planning Hot Fixes on page 18.
- ❑ Activate the required and optional Sage 100 modules, the Sage Production Management module and the Sage Inventory Requirements Planning module from Library Master Main menu > Company Information. Refer to Activating Sage Inventory Requirements Planning on page 16.
- ❑ Create and set up company data files for required and optional Sage 100 modules that integrate with Sage Production Management and Sage Inventory Requirements Planning. Refer to page 16.
- ❑ Define role security for Sage Production Management, Sage Inventory Requirements Planning, and Scanco Product Registration from Library Master Main menu > Role Maintenance.
- ❑ Register Sage Production Management and Sage Inventory Requirements Planning 6.20.2.0.0 from Library Master Setup menu > Scanco Product Registration. Refer to Registering Sage Inventory Requirements Planning on page 16.
- ❑ Verify the Sage 100 and Sage Inventory Requirements Planning versions by accessing Inventory Requirements Planning Setup menu > About Inventory Requirements Planning. Refer to page 20.
- ❑ Access Production Management Setup menu > Production Management Options to run the Production Management Setup Wizard. Continue setting up the Sage Production Management module.
- ❑ Access Inventory Requirements Planning Setup menu > Inventory Requirements Planning Options to set up the Inventory Requirements Planning module.

Upgrade of Sage 100 to 2020 with a New Installation of Inventory Requirements Planning

- ❑ Complete the Sage Inventory Requirements Planning 6.20.2.0.0 pre-installation checklist. Refer to page 5.
- ❑ Conduct a parallel installation of Sage 100 2020. Refer to the Sage 100 2020 Installation and System Administrator's Guide, Sage 100 2020 Customer Upgrade Guide, and Sage 100 2020 Upgrade Checklist.
- ⚠ **Warning:** Install Sage Inventory Requirements Planning 6.20.2.0.0 into a parallel test Sage 100 environment. Performing a test upgrade or a test new install allows you to resolve issues that may occur during the live upgrade or live new install, reducing downtime and allows you to get a rough estimate of how long the upgrade process will take. Refer to the [Sage Knowledgebase article ID 101266](#) for more information. As not noted in the Sage Knowledgebase article before step 20, third party products must be re-installed after a migration.
- ❑ Install Product Update 2 for Sage 100 2021.
- ❑ Run the Sage 100 workstation setup process on all applicable workstations. Refer to the Sage 100 2020 Installation and System Administrator's Guide.
- ❑ Migrate and convert Sage 100 data to 2020 version 6.20.2.0. Refer to the Sage 100 2020 Customer Upgrade Guide and Sage 100 2020 Upgrade Checklist.
- ❑ Install Sage Inventory Requirements Planning 6.20.2.0.0. Refer to Installing Sage Inventory Requirements Planning on page 12.
- ❑ If hot fixes are available on the Sage Inventory Requirements Planning Downloads page for Sage Inventory Requirements Planning version 6.20.2.0.0, install Sage Inventory Requirements Planning 6.20.2.0.0 hot fixes. Refer to Sage Inventory Requirements Planning Hot Fixes on page 18.
- ❑ Activate the required and optional Sage 100 modules and the Sage Inventory Requirements Planning module from Library Master Main menu > Company Information. Refer to Activating Sage Inventory Requirements Planning on page 16.
- ❑ Create and set up company data files for required and optional Sage 100 modules that integrate with Sage Inventory Requirements Planning. Refer to page 16.
- ❑ Define role security for Sage Inventory Requirements Planning and Scanco Product Registration from Library Master Main menu > Role Maintenance.

- ❑ Register Sage Inventory Requirements Planning 6.20.2.0.0 from Library Master Setup menu > Scanco Product Registration. Refer to Registering Sage Inventory Requirements Planning page 16.
- ❑ Verify the Sage 100 and Sage Inventory Requirements Planning versions by accessing Inventory Setup menu > About Inventory Requirements Planning. Refer to page 20.
- ❑ Access Inventory Requirements Planning Setup menu > Inventory Requirements Planning Options to set up the Inventory Requirements Planning module.

Upgrade of Sage 100 with a New Installation of Inventory Requirements Planning and Production Management

- ❑ Complete the Sage Inventory Requirements Planning 6.20.2.0.0 pre-installation checklist. Refer to page 5.
- ❑ Conduct a parallel installation of Sage 100 2020. Refer to the Sage 100 2020 Installation and System Administrator's Guide, Sage 100 2020 Customer Upgrade Guide, and Sage 100 2020 Upgrade Checklist.
- ⚠ **Warning:** Install Sage Inventory Requirements Planning 6.20.2.0.0 into a parallel test Sage 100 environment. Performing a test upgrade or a test new install allows you to resolve issues that may occur during the live upgrade or live new install, reducing downtime and allows you to get a rough estimate of how long the upgrade process will take. Refer to the [Sage Knowledgebase article ID 101266](#) for more information. As not noted in the Sage Knowledgebase article before step 20, third party products must be re-installed after a migration.
- ❑ Install Product Update 2 for Sage 100 2021.
- ❑ Run the Sage 100 workstation setup process on all applicable workstations. Refer to the Sage 100 2020 Installation and System Administrator's Guide, Sage 100 2020 Customer Upgrade Guide, and Sage 100 2020 Upgrade Checklist.
- ❑ Migrate and convert Sage 100 data to 2020 version 6.20.2.0. Refer to the Sage 100 2020 Installation and System Administrator's Guide.
- ❑ Install Sage Production Management 6.20.2.0.0. 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 6.20.2.0.0, install Sage Production Management 6.20.2.0.0 hot fixes. Refer to the Sage Production Management Installation guide.
- ❑ Install Sage Inventory Requirements Planning 6.20.2.0.0. Refer to Installing Sage Inventory Requirements Planning on page 12.
- ❑ If hot fixes are available on the Sage Inventory Requirements Planning Downloads page for Sage Inventory Requirements Planning version 6.20.2.0.0, install Sage Inventory Requirements Planning 6.20.2.0.0 hot fixes. Refer to Sage Inventory Requirements Planning Hot Fixes on page 18.
- ❑ Activate the required and optional Sage 100 modules, if not already activated, Sage Production Management module, and the Sage Inventory Requirements Planning module from Library Master Main menu > Company Information. Refer to Activating Sage Inventory Requirements Planning on page 16.
- ❑ Create and set up company data files for required and optional Sage 100 modules that integrate with Sage Production Management and Sage Inventory Requirements Planning. Refer to page 16.
- ❑ Define role security for Sage Production Management, Sage Inventory Requirements Planning and Scanco Product Registration from Library Master Main > Role Maintenance.
- ❑ Register Sage Production Management and Sage Inventory Requirements Planning 6.20.2.0.0 from Library Master Setup menu > Scanco Product Registration. Refer to Registering Sage Inventory Requirements Planning on page 16.
- ❑ Verify the Sage 100 and Sage Production Management versions by accessing Production Management Setup menu > About Production Management. The Sage 100 version should display as 6.20.2.0 and the Sage Production Management version should display as 6.20.2.0.0. Refer to the Production Management Installation Guide.

- ❑ Verify the Sage 100 and Sage Inventory Requirements Planning versions by accessing Inventory Requirements Planning Setup menu > About Inventory Requirements Planning. Refer to page 20.
- ❑ If not previously conducted during the company conversion process from Company Information, 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 2020 Customer Upgrade Guide and the Sage 100 2020 Upgrade Checklist.
- ❑ Reset all grids.
- ❑ Review migrated data in all Sage 100 modules.
- ❑ Set up Inventory Requirements Planning options. Access the setup wizard from Inventory Requirements Planning Setup menu > Inventory Requirements Planning Options.

Upgrade of Sage 100 and Inventory Requirements Planning

- ❑ Complete the Sage Inventory Requirements Planning 6.20.2.0.0 pre-installation checklist. Refer to page 5.
- ❑ Conduct a parallel installation of Sage 100 2020 when upgrading from version 2019. Refer to the Sage 100 2020 Installation and System Administrator's Guide, Sage 100 2020 Customer Upgrade Guide, and Sage 100 2020 Upgrade Checklist.
- ⚠ **Warning:** Install Sage Inventory Requirements Planning 6.20.2.0.0 into a parallel test Sage 100 environment. Performing a test upgrade or a test new install allows you to resolve issues that may occur during the live upgrade or live new install, reducing downtime and allows you to get a rough estimate of how long the upgrade process will take. Refer to the [Sage Knowledgebase article ID 101266](#) for more information. As not noted in the Sage Knowledgebase article before step 20, third party products must be re-installed after a migration.
- ❑ Install Product Update 2 for Sage 100 2021.
- ❑ Run the Sage 100 workstation setup process on all applicable workstations. Refer to the Sage 100 2020 Installation and System Administrator's Guide.
- ❑ Install Sage Inventory Requirements Planning 6.20.2.0.0. Refer to Installing Sage Inventory Requirements Planning on page 12.
- ❑ Migrate and convert Sage 100 data to 2020 version 6.20.2.0. Refer to the Sage 100 2020 Installation and System Administrator's Guide, Sage 100 2020 Customer Upgrade Guide, and Sage 100 2020 Upgrade Checklist.
- ❑ Reinstall Sage Inventory Requirements Planning 6.20.2.0.0. Refer to Installing Sage Inventory Requirements Planning on page 12.
- ❑ If hot fixes are available on the Sage Inventory Requirements Planning Downloads page for Sage Inventory Requirements Planning version 6.20.2.0.0, install Sage Inventory Requirements Planning 6.20.2.0.0 hot fixes. Refer to Sage Inventory Requirements Planning Hot Fixes on page 18.
- ❑ Back up all company data files before conducting the company conversion process.
- ❑ Run the data conversion process from Library Master Main menu > Company Information.
- ❑ Activate the required and optional Sage 100 modules, if not already activated, from Library Master Main menu > Company Information. Refer to Activating Sage Inventory Requirements Planning on page 16.
- ❑ Create and set up company data files for required and optional Sage 100 modules that integrate with Sage Inventory Requirements Planning. Refer to page 16.
- ❑ Define role security for Sage Inventory Requirements Planning and Scanco Product Registration from Library Master Main > Role Maintenance.
- ❑ Register Sage Inventory Requirements Planning 6.20.2.0.0 from Library Master Setup menu > Scanco Product Registration. Refer to Registering Sage Inventory Requirements Planning on page 16.
- ❑ Verify the Sage 100 and Sage Inventory Requirements Planning versions by accessing Inventory Requirements Planning Setup menu > About Inventory Requirements Planning. Refer to page 20.

- ❑ If not previously conducted during the company conversion process from Company Information, 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 2020 Customer Upgrade Guide and the Sage 100 2020 Upgrade Checklist.
- ❑ Reset all grids.
- ❑ Review migrated data in all Sage 100 modules, including Sage Inventory Requirements.

Upgrade of Sage 100, Inventory Requirements Planning, and Production Management

- ❑ Complete the Sage Inventory Requirements Planning 6.20.2.0.0 pre-installation checklist. Refer to page 5.
- ❑ Conduct a parallel installation of Sage 100 2020 when upgrading from version 2019. Refer to the Sage 100 2020 Installation and System Administrator's Guide, Sage 100 2020 Customer Upgrade Guide, and Sage 100 2020 Upgrade Checklist.
- ⚠ **Warning:** Install Sage Inventory Requirements Planning 6.20.2.0.0 into a parallel test Sage 100 environment. Performing a test upgrade or a test new install allows you to resolve issues that may occur during the live upgrade or live new install, reducing downtime and allows you to get a rough estimate of how long the upgrade process will take. Refer to the [Sage Knowledgebase article ID 101266](#) for more information. As not noted in the Sage Knowledgebase article before step 20, third party products must be re-installed after a migration.
- ❑ Install Product Update 2 for Sage 100 2021.
- ❑ Run the Sage 100 workstation setup process on all applicable workstations. Refer to the Sage 100 2020 Installation and System Administrator's Guide.
- ❑ Install Sage Production Management 6.20.2.0.0. Refer to the Sage Production Management Installation Guide.
- ❑ Install Sage Inventory Requirements Planning 6.20.2.0.0. Refer to Installing Sage Inventory Requirements Planning on page 12.
- ❑ Migrate and convert Sage 100 data to 2020 version 6.20.2.0. Refer to the Sage 100 2020 Installation and System Administrator's Guide, Sage 100 2020 Customer Upgrade Guide, and Sage 100 2020 Upgrade Checklist.
- ❑ Reinstall Sage Production Management 6.20.2.0.0. Refer to the Sage Production Management Installation Guide.
- ❑ If hot fixes are available on the Sage Production Management Downloads page for Sage Production Management version 6.20.2.0.0, install Sage Production Management 6.20.2.0.0 hot fixes. Refer to the Sage Production Management Installation Guide.
- ❑ Reinstall Sage Inventory Requirements Planning 6.20.2.0.0. Refer to Installing Sage Inventory Requirements Planning on page 12.
- ❑ If hot fixes are available on the Sage Inventory Requirements Planning Downloads page for Sage Inventory Requirements Planning version 6.20.2.0.0, install Sage Inventory Requirements Planning 6.20.2.0.0 hot fixes. Refer to Sage Inventory Requirements Planning Hot Fixes on page 18.
- ❑ Back up all company data files before conducting the company conversion process.
- ❑ Run the data conversion process from Library Master Main menu > Company Information.
- ❑ Activate the required and optional Sage 100 modules, if not already activated, from Library Master Main menu > Company Information. Refer to Activating Sage Inventory Requirements Planning on page 16.
- ❑ Create and set up company data files for required and optional Sage 100 modules that integrate with Sage Production Management and Sage Inventory Requirements Planning. Refer to page 16.
- ❑ Define role security for Sage Production Management, Sage Inventory Requirements Planning and Scanco Product Registration from Library Master Main menu > Role Maintenance.

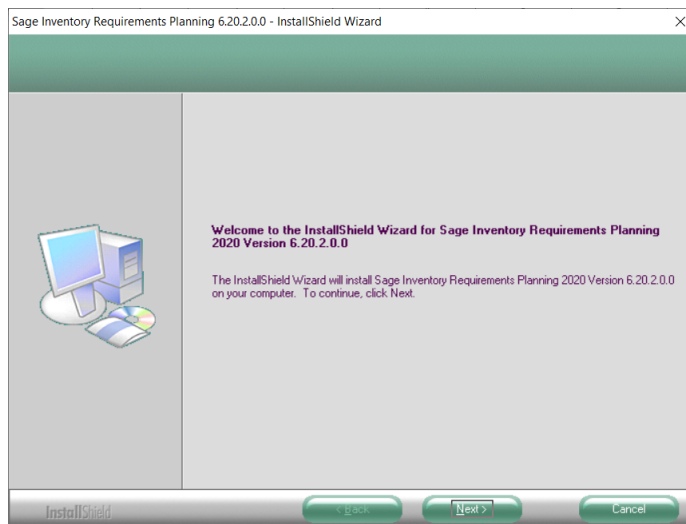
- ❑ Register Sage Production Management and Sage Inventory Requirements Planning 6.20.2.0.0 from Library Master Setup menu > Scanco Product Registration. Refer to Registering Sage Inventory Requirements Planning on page 16.
- ❑ Verify the Sage 100 and Sage Production Management versions by accessing Production Management Setup menu > About Production Management. The Sage 100 version should display as 6.20.2.0 and the Sage Production Management version should display as 6.20.2.0.0. Refer to the Sage Production Management Installation Guide.
- ❑ Verify the Sage 100 and Sage Inventory Requirements Planning versions by accessing Inventory Requirements Planning Setup menu > About Inventory Requirements Planning. Refer to page 20.
- ❑ If not previously conducted during the company conversion process from Company Information, 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 2020 Customer Upgrade Guide and the Sage 100 2020 Upgrade Checklist.
- ❑ Reset all grids.
- ❑ Review migrated data in all Sage 100 modules, including Sage Production Management and Sage Inventory Requirements.

Installing Sage Inventory Requirements Planning

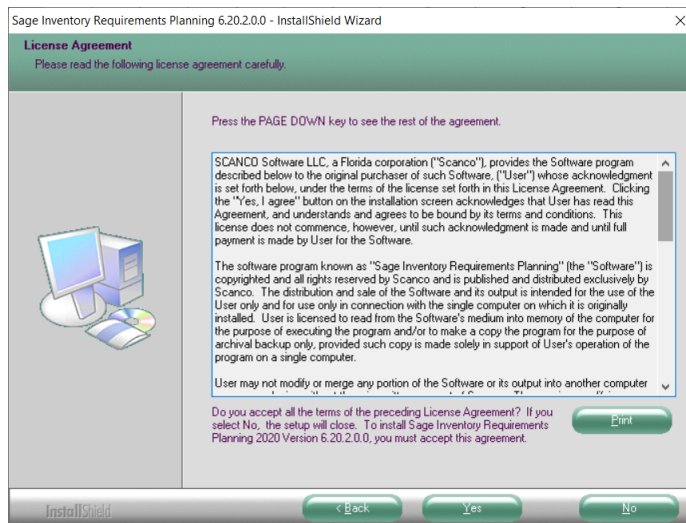
Conduct the following steps after Sage 100 2020 is installed successfully.

How to Install Sage Inventory Requirements Planning

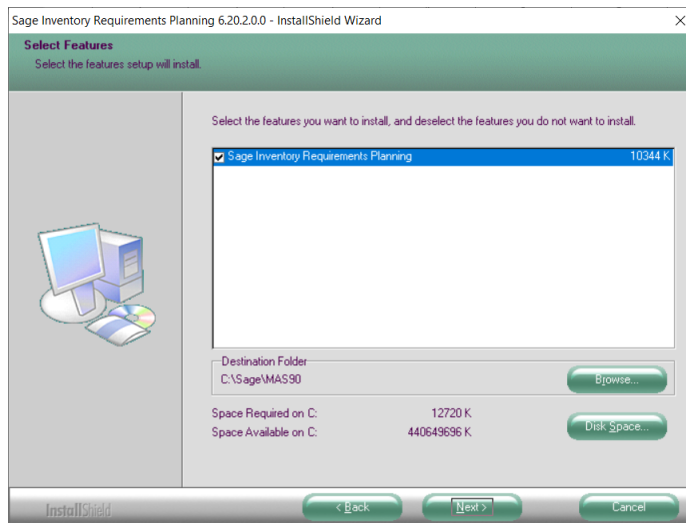
1. Download the IRP_2020_2_0.exe file from the Sage Inventory Requirements Planning Downloads page at <http://info.scanco.com/prod-mgmt-downloads>.
2. Right click on the Sage Inventory Requirements Planning 6.20.2.0.0 executable file.
3. Select Run as administrator.



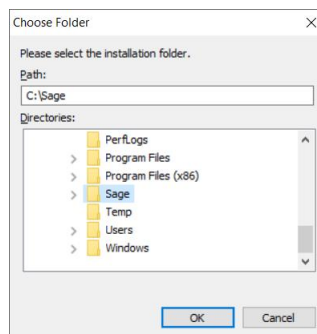
4. Select the Next button from the Sage Inventory Requirements Planning Welcome window.
5. Review the Sage Inventory Requirements Planning License Agreement.



6. Select the Yes button to agree to the Sage Inventory Requirements Planning License Agreement and to continue with the Sage Inventory Requirements Planning 6.20.2.0.0 installation process.
7. Select the Sage Inventory Requirements Planning check box to install Sage Inventory Requirements Planning 6.20.2.0.0.

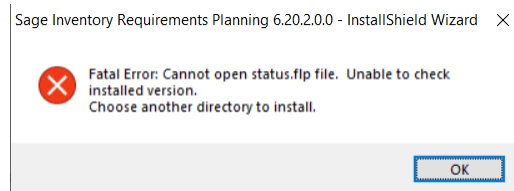


8. Accept the default location of Sage 100 or select the Browse button to specify the location of Sage 100. The Choose Folder window displays after the Browse button is selected.



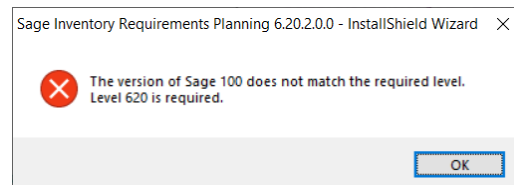
Specify the location of Sage 100 in the Path field. Select the OK button to return to the Select Features window.

Warning: Sage Inventory Requirements Planning 6.20.2.0.0 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.

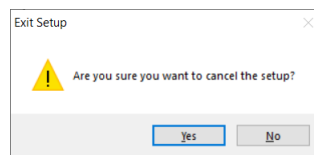


Select the OK button and modify the location where Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium is installed.

Warning: When Sage 100 is installed but is not version 6.20.2.0, the following message displays.

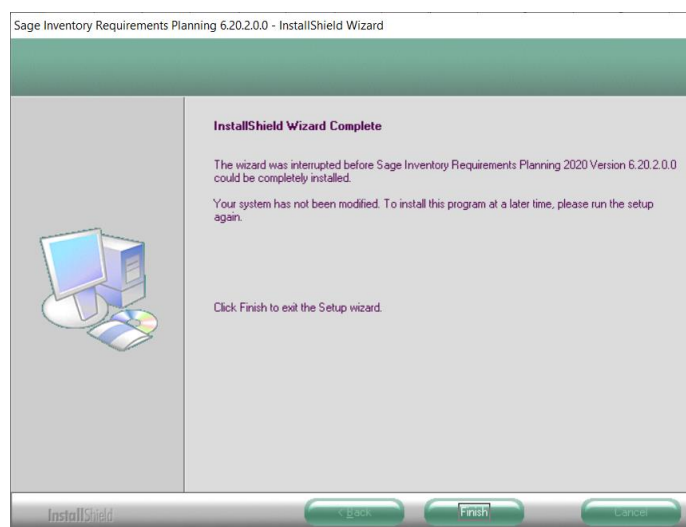


Select the OK button from the message. Select the Cancel button from the Select Features window. The following message displays.



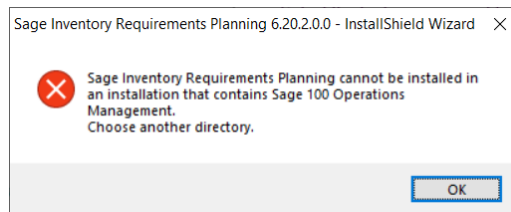
Select Yes in the message.

Select the Finish button from the InstallShield Wizard Complete window to cancel the Sage Inventory Requirements Planning 6.20.2.0.0 installation process.



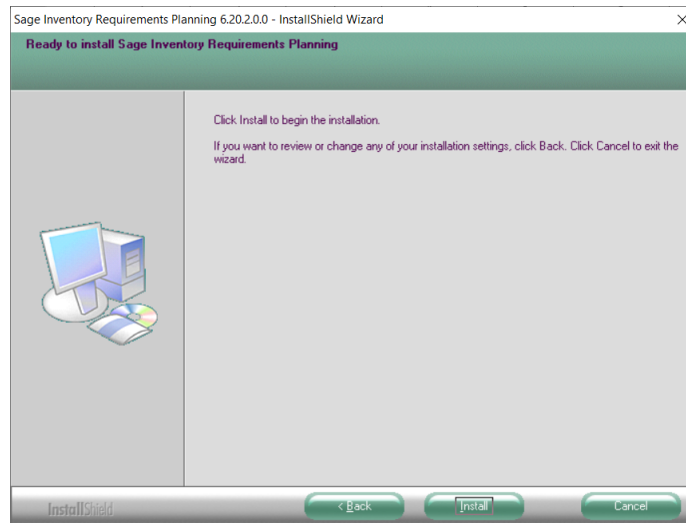
Install Sage 100 2020 6.20.2.0 and then install Sage Inventory Requirements Planning 6.20.2.0.0.

Warning: Sage Inventory Requirements Planning 6.20.2.0.0 may not be installed in the same location where Sage 100 Operations Management is installed. The following message displays when the selected location contains Sage 100cloud Manufacturing.



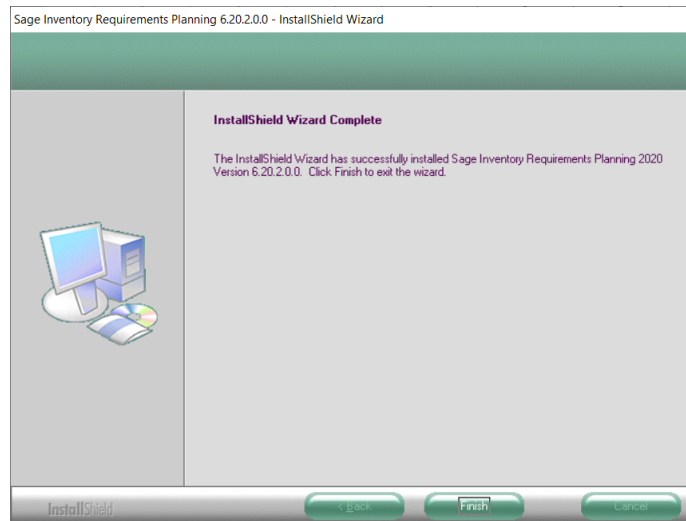
Select the OK button and modify the location where Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium is installed.

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



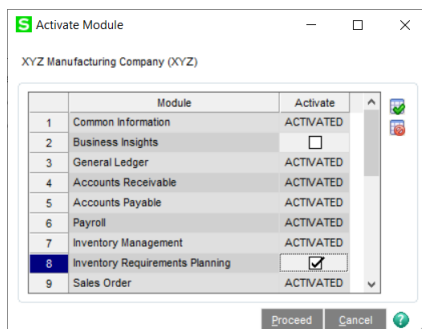
Select the Back button to return to the Select Features window. Select the Cancel button, select Yes in the message *Are you sure you want to cancel the setup?* and the Finish button from the InstallShield Wizard Complete window to cancel the Sage Inventory Requirements Planning 6.20.2.0.0 installation process.

11. Select the Finish button from the InstallShield Wizard Complete window to complete the Sage Inventory Requirements Planning 6.20.2.0.0 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.

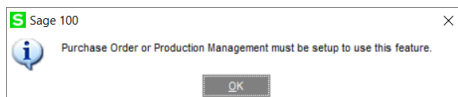


5. Select the Proceed button.

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 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

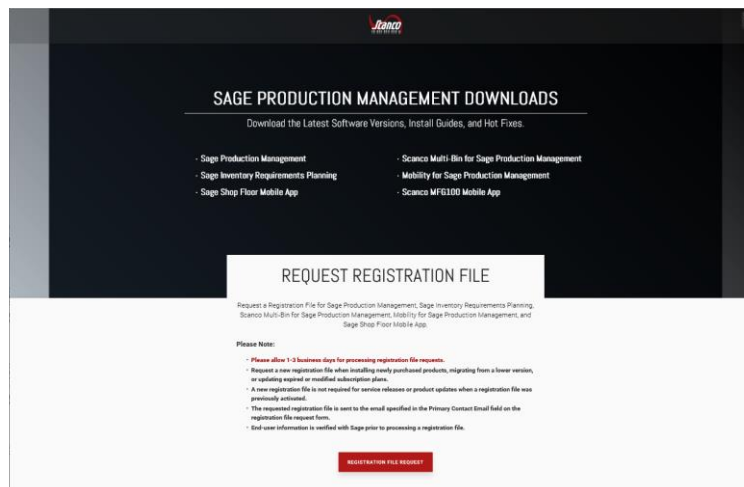
A new registration file must be requested and activated

1. For a new installation of Sage Inventory Requirements Planning,
2. When a module or add on was recently purchased or previously not activated,
3. When the Sage 100 user count changes,
4. When migrating from a lower version, for example 2019 version 6.10.5.0 to 2020 version 6.20.2.0, or
5. When the subscription plan has expired or modified.

A new registration file is not required for service releases or product updates when a registration file was previously activated.

How to Obtain Sage Inventory Requirements Planning Registration


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



2. Scroll down and click on Registration File Request button.


3. Enter the required information in the registration form. Fields noted with an asterisk (*) are required.
4. Select the Sage Inventory Requirements Planning check box. Select the check boxes for Sage Inventory Requirements Planning, Scanco Multi-Bin for Production Management, Sage Shop Floor User/Devices, Mobility for Sage Production Management, and/or Dynamic Off when these modules have been purchased.

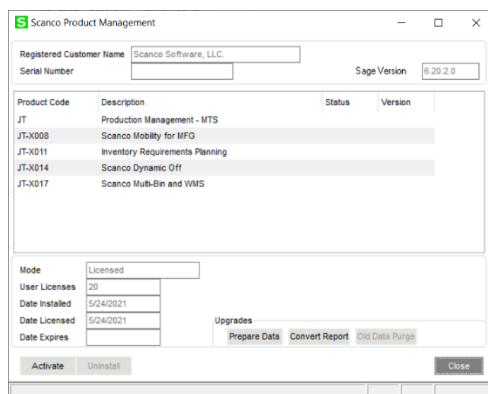
5. Select the Submit button.

 **Note:** Please allow 1-3 business days 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

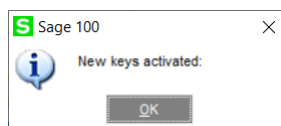
1. Access Library Master Setup menu > Scanco Product Registration.

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

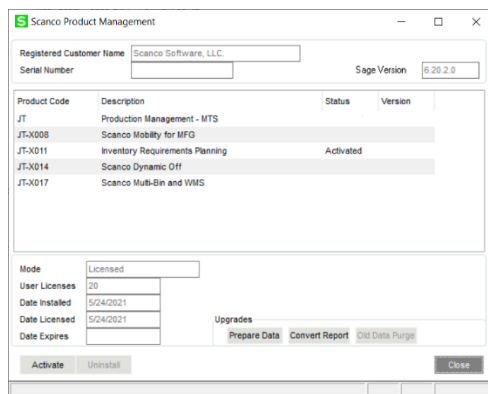


Product Code	Description	Status	Version
JT	Production Management - MTS		
JT-X008	Scanco Mobility for MFG		
JT-X011	Inventory Requirements Planning		
JT-X014	Scanco Dynamic Off		
JT-X017	Scanco Multi-Bin and WMS		

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 JT-X011 Inventory Requirements Planning product code record.



Product Code	Description	Status	Version
JT	Production Management - MTS		
JT-X008	Scanco Mobility for MFG		
JT-X011	Inventory Requirements Planning	Activated	
JT-X014	Scanco Dynamic Off		
JT-X017	Scanco Multi-Bin and WMS		

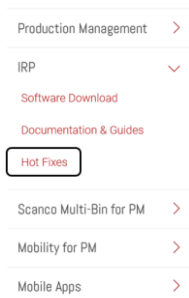
6. Select the Close button.

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

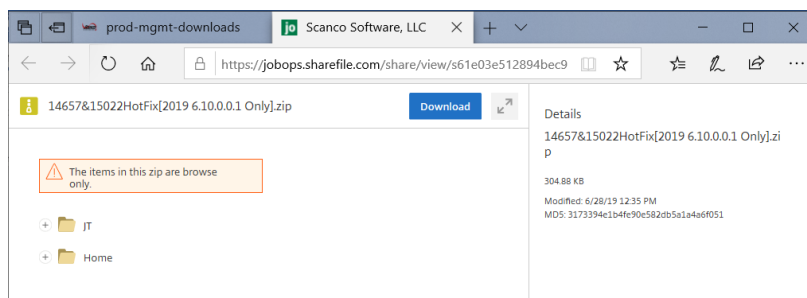
1. Access the Sage Production Management Downloads page <http://info.scanco.com/prod-mgmt-downloads>
2. Select the IRP menu.
3. Select Hot Fixes from the IRP menu.




4. Review the available hot fixes for Sage Inventory Requirements Planning for the currently installed version.

 **Note:** Hot fixes are version specific. Only install hot fixes for the currently installed Scanco Inventory Requirements Planning version.

5. Click on a hot fix link to be directed to the download file.



6. Click on the Download button.
7. Specify the location to download the hot fix.
8. 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.

9. 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.
10. Review the document included in the hot fix download file. Descriptions and instructions are included in this documentation.

Module Integration with Sage Inventory Requirements Planning


Sage Inventory Requirements Planning 6.20.2.0.0 integrates with the following modules.


- Sage Production Management 6.20.2.0.0
- Sales Order
- Purchase Order


Integration settings for these modules are maintained from the Inventory Requirements Planning Setup menu > Inventory Requirements Planning Options.

The following modules do not integrate with Sage Inventory Requirements Planning 6.20.2.0.0 but may be installed in Sage 100 when Sage Inventory Requirements Planning is installed.

- Scanco Multi-Bin
- Material Requirements Planning

 **Warning:** Sage Material Requirements Planning data is not reviewed and does not display in Sage Inventory Requirements Planning 6.20.2.0.0.

 **Warning:** Sage Inventory Requirements Planning 6.20.2.0.0 may not be compatible with non-Scanco third-party products. Confirm with the vendor of the third-party product to ensure a third-party product is fully compatible with the current Sage release. If other Sage products are integrated, check with your business partner or Sage to ensure that these components are compatible.

 **Warning:** Sage Inventory Requirements Planning 6.20.2.0.0 may not be installed when Sage Operations Management is installed in Sage 100.

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.