INTEGRATION WITH SAGE

THE INTEGRATION BETWEEN PREACTOR & SAGE

On its own the Preactor software is a modeling tool.

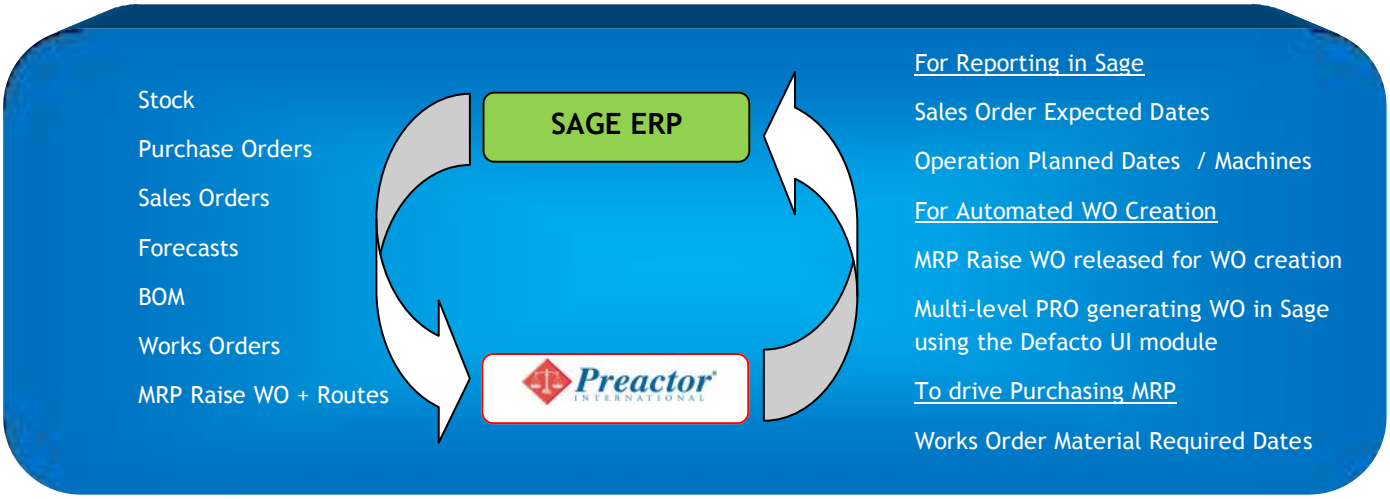
The tool needs to understand the characteristics of your factory.

So Preactor needs 2 things to be able to function:

1) A **configuration** for Preactor:

- Data table description of fields and their Preactor properties.
- Definition of the menu system and the initial settings (similar to Sage system keys).

2) An **interface** for passing data from / to the ERP system:



sl-ect has designed a “configuration” that is ready to accept the available fields from Sage and which utilises all the main features of Preactor. Including the new Material Explorer functionality.

To support this we’ve re-designed our “interface” to deliver a fast, flexible way of moving data between Sage and Preactor.

This also includes a tool called PRO which can be used to generate production orders within Preactor, using data from Sage.

The interface is currently available for all versions of Sage Line 500 and Sage ERP 1000 running on SQL2005 or later.

Also some updates take place in the reverse direction, after the plan is published. Sage is updated from Preactor to set various dates on works orders (WO) and to release selected MRP recommendations for automated WO creation.

Note: The PRO system and any data imported for use in Preactor Material Control are only used by Preactor 400 & 500 systems.

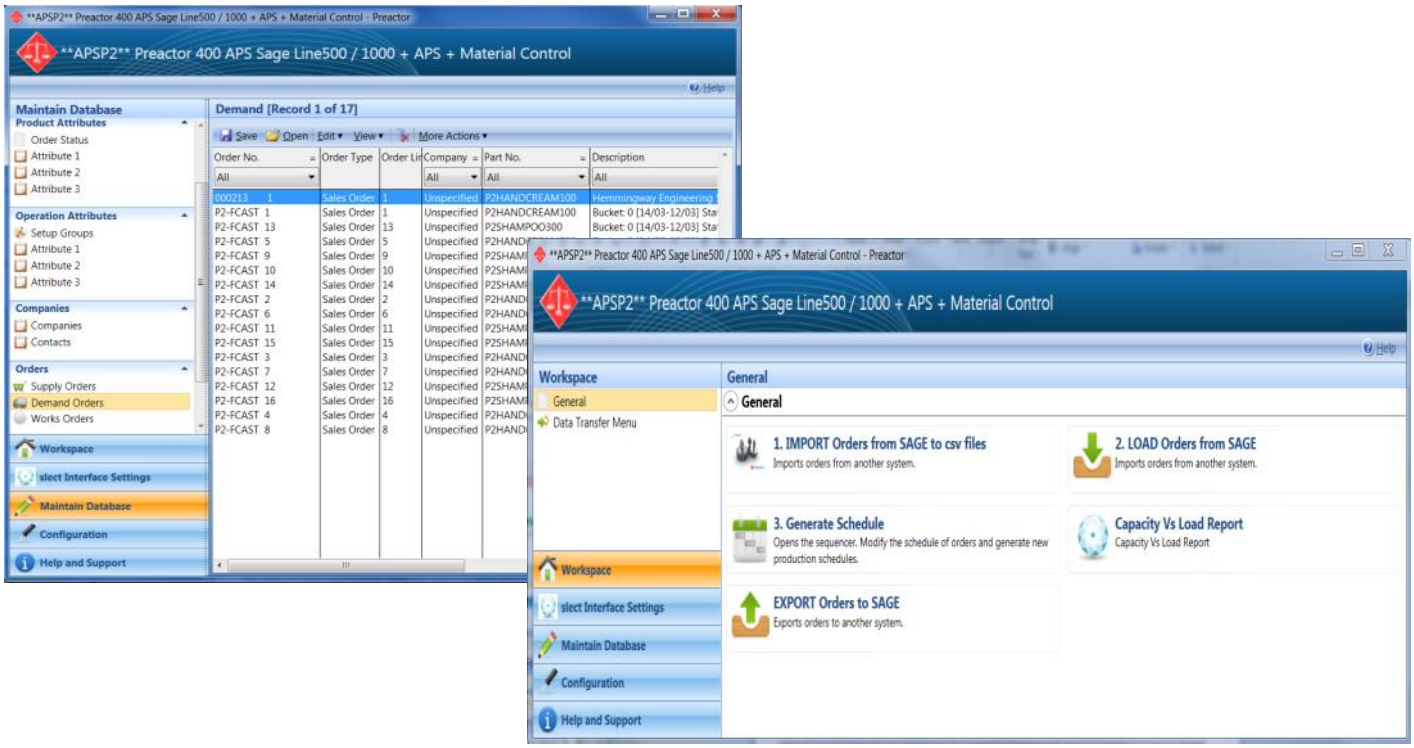
The Preactor Configuration

This is a folder that holds various files used to describe your environment to Preactor.

The main files are:

Preactor.prmdf

This is the “menu definition file” where we describe the layout of the menu system, deciding which options are available on each of the sub-menus.



Preactor.prtdf

This is the “table definition file” where we describe the layout of the various data tables. Effectively it is a data dictionary for Preactor, containing the tables and fields that Preactor needs.

Plus additional items that match the fields that are available in the Sage manufacturing modules.

Preactor dynamically builds the SQL tables based on this file.

For instance the F7 Notes that can be added to a works order header are shown on the Preactor jobs:

```
1050     Operation Name,-1,STRING,
1051        BAR TEXT
1052        TIP DISPLAY
1053        HELPPOPUPID (110)
1054        FREE FORMAT (30)
1055        UxxxxNIQUE FOR FAMILY
1056        GANTT LEGEND:
1057     Resource,-1,STRING,
1058        HELPPOPUPID (150)
1059        DATABASE(Resource Group(Resources))
1060        ALLOW UNSPECIFIED
1061        V AXIS
1062        TIP DISPLAY
1063        DEFAULT ON SPLIT:
1064     Sage F7 Notes,-1,STRING,
1065           READ ONLY
1066           FREE FORMAT(30)
1067           ALLOW EMPTY
1068           MAX LENGTH(1000)
1069           MULTILINE
1070           TIP DISPLAY
1071           DIALOG ONLY:
```

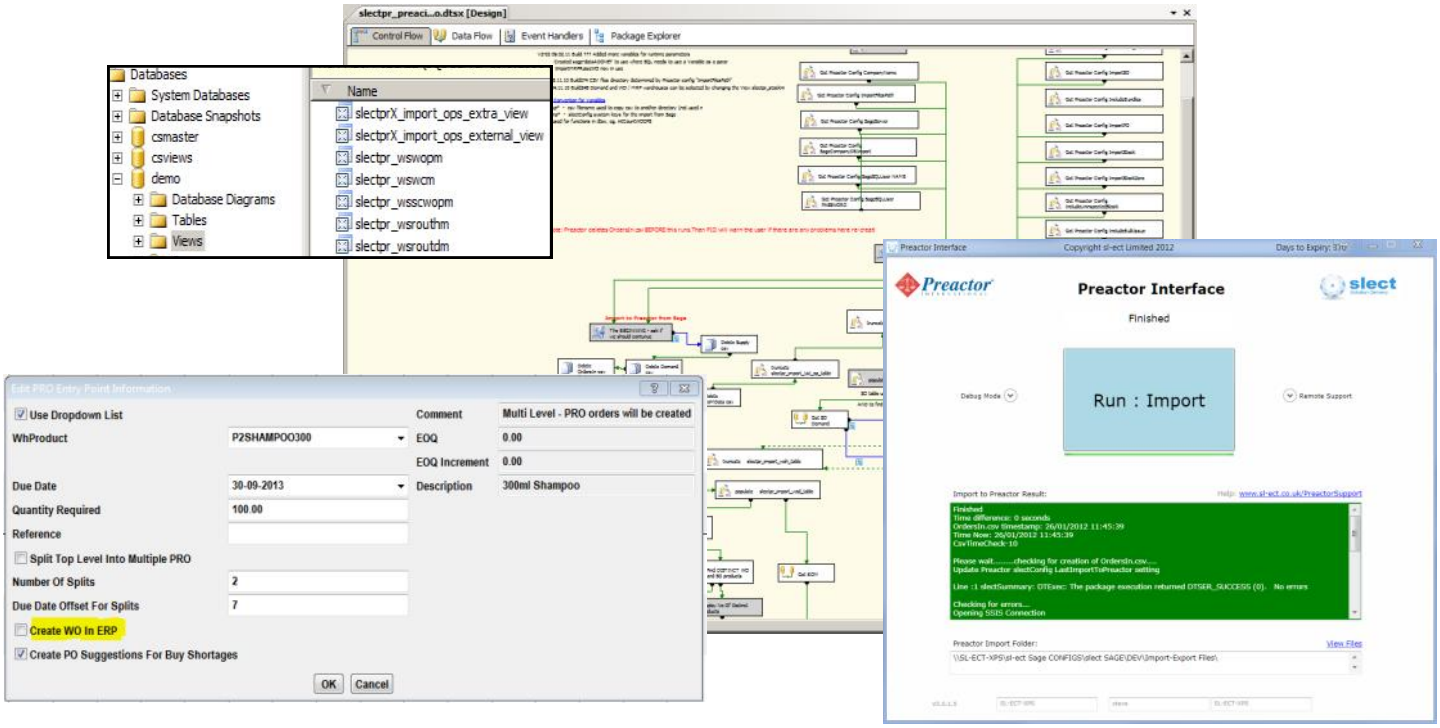
The Data Interface

This is a 2-way process that supports the planning cycle. Data records from Sage are sent to Preactor to show existing and new orders to the planner.

On publication of the new schedule the planner can also send updates back to the Sage for information & reporting purposes.

Type	Data	Description
Import to Preactor	Sales Forecasts and/or Sales Orders	Optionally netted off to avoid duplicating demand
Import to Preactor	Purchase Orders	External supply with dates and remaining quantities
Import to Preactor	Product Codes	Descriptions + initial stock for Preactor pegging
Import to Preactor	Works Order Headers	Supply of made products + target dates
Import to Preactor	Works Order Details	BOM data to show the demand for components + required dates
Import to Preactor	Works Order Operations	Process routes describing resource groups, run rates and setup times
Import to Preactor	MRP Recommendations	Suggestions to raise new Works Orders
Import to Preactor	BOM for MRP Recommendations	BOM data to show the demand for components + required dates
Import to Preactor	Routings for MRP Recommendations	Process routes describing resource groups, run rates and setup times
Import to Preactor	Up to 30 extra fields	Modify a SQL View to fetch fields from anywhere in the Sage database
Export to Sage	Planned production dates	For reporting of the latest plan from within the Sage database
Export to Sage	Update Works Orders	Expected completion dates. Component start dates. Making the planned dates available to Predict Future Stock and MRP.
Export to Sage	Approve MRP Recommendations	To automatically create WO for jobs with dates in the Preactor firm plan period.
PRO Preactor Orders	Create multi-level PRO orders from within Preactor by reading the Sage BoM and Routing. Push PRO back to Sage to create WO	Don't wait for WO to be entered manually in Sage or suggested by MRP overnight. Instead create "PRO" orders in Preactor to get quick accurate answers for new delivery promises. If it is for a quote then discard the PRO orders. Or optionally ask that they get raised directly in Sage as full WO (requires Defacto UI module).

The interface has been developed using a combination of .Net, SQL Integration Services and Stored Procedures / Views.

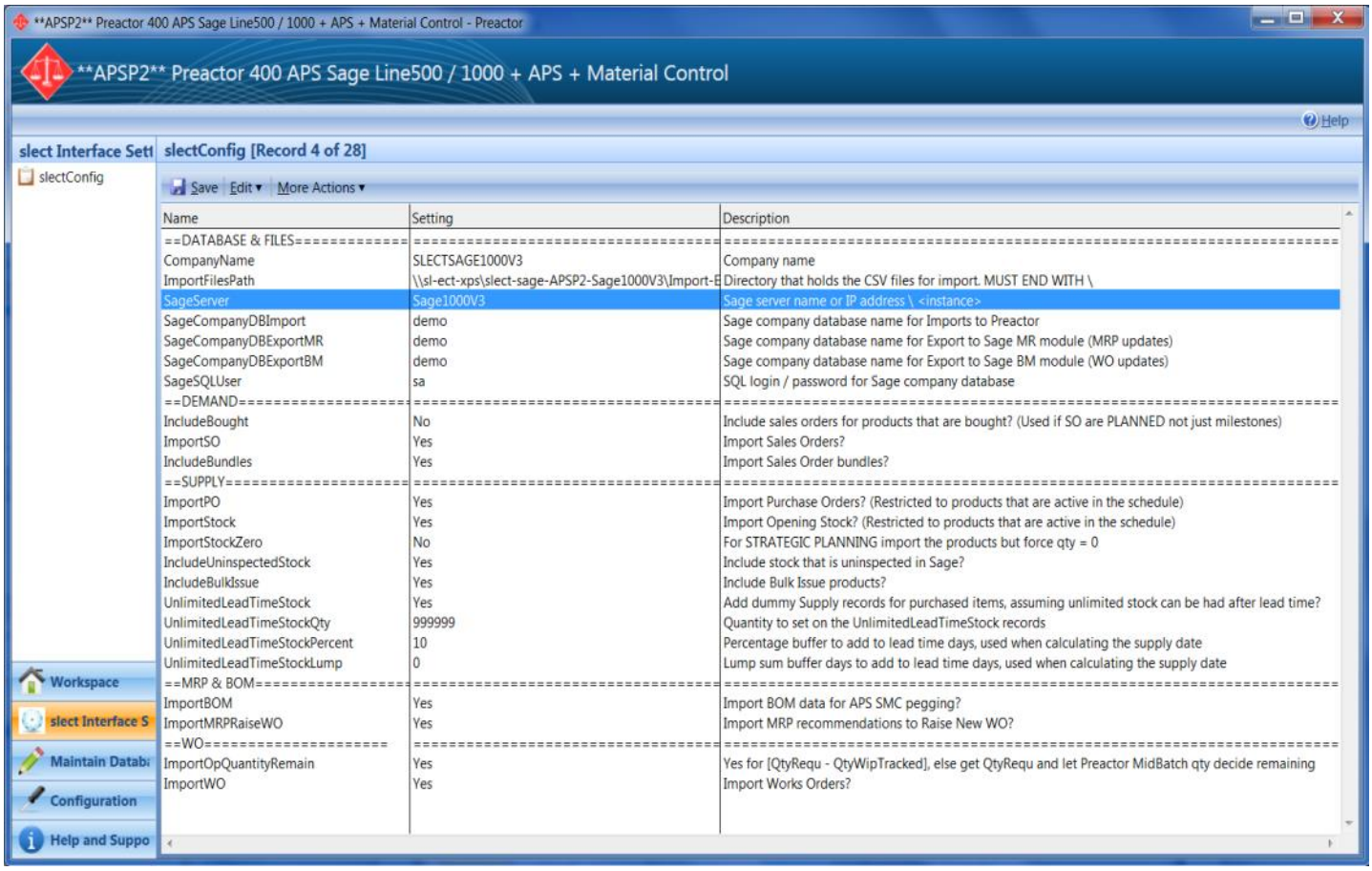


Configurable Settings

Like Sage with its system keys, the interface has settings that let you change the behaviour of the system for different scenarios.

For instance some companies wish to only plan the Works Orders on the assumption that materials are always available (they might run a purchasing MRP afterwards to check for exceptions to this). And maybe they make-to-order and have already raised all the WO that are needed. So they would set “ImportPO” and “ImportMRPRaiseWO” to “No”.

Or for strategic long term planning based on a 12 month sales forecast you can ignore the current stock and WIP position by setting “ImportWO” to “No” and “ImportStockZero” to “Yes” .



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