What's New in Infor VISUAL 6.5.3 and 6.5.4?

The following items are new features since VISUAL 6.5.2. For new features from previous versions, see the release notes for each major VISUAL version. Please note that VISUAL 6.5.4 did not introduce any new features since VISUAL 6.5.3 but version 6.5.4 added the components needed to integrate with Infor Source Open Architecture (SOA). VISUAL 6.5.4 can send information through Infor SOA to Infor Evolve applications such as ***Infor MyDay***.

Editable Windows

Using Unify's Team Developer Object Nationalizer, you can create and modify screen overlays for most of your windows. When you start a program, the system checks for the existence of an overlay for that program. If the system detects an overlay, it starts the program with the overlay.

By developing custom overlays for your windows, you can change windows to better fit your needs or the needs of specific departments within your company. For example, if you are working in the Customer Maintenance window and do not want your employees to be able to view customer credit amounts, you could create an overlay that hides the credit amount and any other field you see fit to hide.

High Contrast Mode in the Manufacturing Window

If you select Use High Contrast in the Accessibility Options of your computer's Control Panel, the Manufacturing Window now uses the high contrast settings. The background is black, and the fonts are white. Please note that high contrast mode applies to text displays only (Text 1 Display Mode, the text portion of Graphical 2 Display Mode, and the text portion of the Text 2 Display Mode). High Contrast color schemes can increase legibility for some users by heightening screen contrast with alternative color combinations.

Print to XML and HTML Document Format

The following programs now support the printing of documents in XML and HTML formats:
Return Material Authorization (VMRMAEN.exe)

- Shipping Entry (VMSHPENT.exe)
- Customer Maintenance (VMCUSMNT.exe)
- Customer Order Entry (VMORDENT.exe)
- Estimating Window (VMESTWIN.exe)
- Order Management Window (VMORDWIN.exe)
- Invoice Forms (VMINVGEN.exe)
- Purchase Order Entry (VMPURENT.exe)
- Vendor Request For Quote (VMRFQENT.exe)
- Outside Service Dispatch Entry (VMSRVDIS.exe)

Outlook Integration

You can export information to Microsoft Outlook in the following applications:

- Accounts Receivable Invoicing (VFARIENT), Receivable Inquiry (VFARCINQ).
- Workflow also supports the creation of tasks in the Task Maintenance window, Outlook, or both.
- You can now export tasks to Outlook from within ECN Entry.

Dragging and Dropping Information

You can drag documents from Microsoft Outlook (and Outlook Express), Windows Explorer, and My Computer and drop them in Document Maintenance.

Infor VISUAL Connector

In the following programs you can pass the current information appearing in the window to an external program using the VISUAL Connector:

- Customer Maintenance
- Customer Order Entry
- Manufacturing Window
- Order Management Window
- Part Maintenance
- Purchase Order Entry
- Purchase Management Window
- Requisition Entry
- Shop Resource Maintenance
- Vendor Maintenance

For example, if you are working in Customer Maintenance, you can set up a button on the user toolbar that opens your custom program and sends it information from the current customer record.

Additional Document Functionality

E-mailing Documents

You can now send associated documents when you e-mail information.

- An "Allow E-mailing Associated Documents (default)" check box appears on the Default tab of the Application Global Maintenance window allowing you to select the default for all windows supporting this function.
- An "Allow E-mailing" check box appears in the Document Maintenance window so that users can override the default setting for each document ID.

Sending to Document Contacts

In the following programs users now have the option to send reports to the customer or vendor Document Contacts list:

- Customer Maintenance (VMCUSMNT.exe)
- Vendor Maintenance (VMVNDMNT.exe)
- Customer Order Entry (VMORDENT.exe)
- Shipping Entry (VMSHPENT.exe)
- Vendor Request For Quote (VMRFQENT.exe)
- Purchase Order Entry (VMPURENT.exe)
- Inter Branch receipt Entry (VMIBTRCV.exe)

Print Associated Documents

In the following programs, users can now print the associated documents with the reports:

- Part Maintenance (VMPRTMNT.exe)
- Estimating Window (VMESTWIN.exe)
- Purchase Order Entry (VMPURENT.exe)
- Work Order Travellers (VMTRVRPR.exe)

Examine Triggers

Infor has created a new program that checks your database for missing, current, and disabled triggers. The Examine Triggers tool compares the list of required triggers to those it finds in the SYSTRIGGERS database table.

Audit Management

- This new feature allows you to track any database information. Tracking options include Add, Edit, Delete.
- Use Audit Management to define which database tables, and specifically which columns, to include in an audit trail.
- Caution when using this feature: The number of columns is vast, and the greater the number of columns you track, the greater strain is placed on your database.

Suppress Printing of Invoices

Customer Maintenance (VMCUSMNT) Window
For any given customer, you can define whether you want to print invoices, by default. This can be overridden at the Invoice level, however.
Within Customer Maintenance, on the Accounting tab, a new Suppress Printing of Invoices check box is present. When you select this option, by default, any invoices for the current customer will not print.

Invoice Forms (VMINVGEN) Window
When you elect not to print invoices for a customer, you can view a list of all unprinted invoices. To do so, from the Invoice Forms window's File menu, select Print List of Unprinted Invoice(s).

Consigned Inventory

Consigned inventory is inventory—parts and material—kept in a location but owned by the supplying company. For example, you have a vendor supplying you with PART A. You purchase the part one hundred at a time but your vendor ships them one thousand at a time. Your vendor may ship you one thousand of which you purchase one hundred and stock nine hundred on consignment: you own one hundred and the vendor owns nine hundred even though you are stocking the nine hundred. The next time you purchase one hundred, you take ownership of that one hundred and the vendor continues to own the remaining eight hundred.

Security

Infor has moved security management to a new "Security" menu.
To enhance the security of your programs, the password functionality includes the ability for the system administrator to specify password requirements and longevity settings.
You can print a report of the modules to which a valid user has access. These reports are useful to System Administrators who need to be able to keep track of user access. In assigning tasks, a System Administrator can delegate more effectively by reading this report.

Manufacturing Window Child Table Totals

In the Manufacturing Window, the system now totals the columns in the following information tables to view on the screen or print:

- Labor Tickets - Hours Worked and Break Hours
- Splits - Estimated, Actual, and Projected
- Estimated Exploded Costs - Estimated, Estimated Material, Estimated Labor, Estimated Burden, Estimated Service, Estimated Total Hours, Estimated Setup Hours, and Estimated Run Hours.

Purpose Management Window

- Efficient procurement requires that you know exactly what your manufacturing and sales demands are, and will be, and purchase the supply necessary to fulfill that demand. Your company's requirements determine when and how much you purchase. Using the Purchase Management Window, you can easily view your demand history and purchase accordingly.
- Instead of printing a Material Planning Report, you can use the Purchase Management Window to view your demand. By using the refresh buttons in the viewing tools, you can view up to date information as other company members update your demand.
- The Purchase Management Window includes a powerful search dialog, enabling you to customize the information appearing in your tools and focus on the information you need for the products on which you are working. For example, in one tool you can have a list of parts and their requirements sorted by preferred vendor. In another tool you can have purchasing history for the part sorted by vendor. You can then drag the demand for a particular part to a vendor and have Purchase Order Entry create a new purchase order for that combination.
- The Purchase Order Entry tool has the same functionality as the standard Purchase Order Entry window—you can select all of the same and have all of the same editing capabilities.
- In addition you can view graphs showing usage for the part and vendor delivery history.

Search in the Material Planning Window

The following options have been added to the Material Planning Window's search function:

- Include parts with shortages only. Select this option to search for parts with a negative projected quantity.
- Exclude obsolete parts. Select this option to omit obsolete parts.
- Parts with material requirements dated between.... Select this option to view material requirements between dates that you specify. When you select this option, the Starting and Ending date fields become active. Enter the dates you would like to use, or click the Calendar buttons to select dates.
- Parts with customer orders dates between.... Select this option to view parts listed on customer orders within dates that you specify. When you select this option, the Starting and Ending date fields become active. Enter the dates you would like to use, or click the Calendar buttons to select dates.

  Within the Material Planning Window (VMPLNWIN), you can view purchase history for a part. With the Part ID visible in Material Planning, a new option appears on the Info menu – Purchase History.
  When you select this option, a Purchase History dialog box appears with details of purchase orders for the part. Additionally, you can double-click a Purchase Order from the Purchase History table to open the order in the Purchase Order Entry window.

Drill Down in Material Planning Details

- Within the Material Planning Window (VMPLNWIN), you can view purchase history for a part. With the Part ID visible in Material Planning, a new option appears on the Info menu – Purchase History. When you select this option, a Purchase History dialog box appears with details of purchase orders for the part. Additionally, you can double-click a Purchase Order from the Purchase History table to open the order in the Purchase Order Entry window.
- You can also double-click a line in the Where Used table to open the associated work order. Double-click a line in the Selling History table to open the associated customer order.

RFQ Entry

RFQ Entry (VMRFQENT) Window

- RFQ Entry has a more streamlined integration with Purchase Order Entry. Addition of the Warehouse ID and Currency ID fields to the RFQ Entry header, as well as Warehouse ID and Part Revision ID to the RFQ Line table provides a more seamless flow into Purchase Order Entry.
- In Purchase Order Entry (VMPURENT), when you select Edit, Generate Order from RFQ, the fields listed above carry into the new purchase order.

Enter Vendor Quote for RFQ Window

- When you enter a Vendor Quote – from the RFQ Entry window's Edit, Vendor Quote option – you can work with multiple lines without the need to exit the window. The Line Number from RFQ Entry appears in the Enter Vendor Quote for RFQ title bar.
- Within Enter Vendor Quote for RFQ window, use the Previous and Next Line toolbar buttons to move from one Quote Line to the next.

Implode Costs Option

When imploding costs, users can select any combination of parts for which to implode costs.

Outside Service Reports

Infor has added the following two reports to Outside Service Receipt Entry:

- Service Dispatches – You can print service dispatches to keep as records of services that you have dispatched during the course of order entry.
- Printing Dispatch Packlists – You can print the current purchase order, the current dispatch packlist, or packlists for all dispatches that occurred between certain dates.

Receiving (VMRCVENT) Window

To streamline the Purchase Receipt processing process and eliminate possible data entry errors when entering Receiving and A/P Invoice information, three new fields have been added to the Receiving and Accounts Payable Invoice Entry windows.

The following fields appear in the Receiving window's header:

- Vendor Packlist ID – If the Vendor supplied you with a Packlist ID, enter it in this field.
- Vendor Packlist Date – If the Vendor's packlist included a date, enter it in this field. You can enter the date manually, or you can select it from the drop-down calendar.
- Vendor Freight Bill ID – If the Vendor included a freight bill, enter the Freight Bill ID here.
- Accounts Payable Invoice Entry (VFAPIENT) Window
- For easy reference to the vendor-supplied information within Receiving, the following columns appear on the Invoice Entry table:
- Vendor Packlist ID – If you entered a Vendor Packlist ID on the Purchase Receipt Entry window, the system copies the ID to this column. You can manually enter the Packlist ID, but it is not required.
- Vendor Packlist Date – If you entered a Packlist Date within Purchase Receipt Entry, the system copies the date to this column. It is for reference only, and not a required field.
- Vendor Freight ID – If there is an associated Vendor Freight Bill ID on the Purchase Receipt Entry header, the system copies the ID to this column. It is not a required value.

Work Order Printing

- In the Work Order Printing dialog, users can now choose to print unreleased work orders in addition to Firmed and Released work orders.
- Also, users can browse for work orders by Planner ID. If users choose to release a work order upon printing, they can specify to release all subordinate legs to be released as well.
- When printing part locations, a new filter enables users to print only those locations associated with the warehouses on the work orders.
- When printing multiple work orders and their associated documents, users can choose to collate the items by work order.

Workflow Gatekeeper

- While the Workflow Tracker shows you what is occurring within the confines of a specific workflow, the Gatekeeper allows you to view all of the processes related to the current Workflow Template. For example, if you are viewing a workflow that incorporates Purchase Orders, you can use the Gatekeeper to view all of the rules within the workflow and all of your processes at that rule awaiting action—too many purchase orders at one rule may indicate a bottleneck.
- This allows you to view what steps have and have not been completed, thus indicating where possible bottlenecks may occur. This allows management to view the overall effectiveness of the workflow as a whole and helps in the design of more efficient workflows.

Receiving Inspection

- Infor has created a stand-alone Receiving Inspection program retaining all of the functionality of the old Receiving Inspection and allowing better data control.
- In keeping with a stand-alone program, Infor has also created a new Receiving Inspection chapter documenting the features of the program.

Macros in Standard Financials

Within Financials, additional macro capability has been added to multiple windows. Macros in Financials function in the same manner as macros in Manufacturing.
The Macro menu option appears on the following windows:

- Accounting Window (VFGLAWIN)
- General Journal Entry (VFGLTENT)
- Revaluation (VFREVALU)
- Invoice Entry (VFARIENT)
- Cash Application (VFARCENT)
- Invoice Entry (VFAPIENT)
- Payment Entry (VFAPCENT)
- Cash Book (VFCASHBK)
- Bank Account Maintenance (VFBNKMNT)

Customizable User Defined Fields

- Customizable User Defined Field functionality now appears within Shipping Entry (VMSHPENT) and Shop Resource Maintenance (VMRESMNT). Customizable User-defined fields function in the same manner as they do within other Infor ERP VISUAL applications.
- You can now include your Customized User Defined fields in your advanced SQL searches.

Document Reference in Standard Financials

Previous versions of Infor ERP VISUAL Enterprise included functionality that allowed users to link to external documents from certain applications. This functionality has been incorporated into Infor ERP VISUAL Financials. Document reference functionality appears in the following applications:

- General Journal Entry (VFFINJRN)
- Accounts Receivable Invoice Entry (VFARIENT)
- Cash Application (VFARCENT)
- Collections Window (VFARCLCT)
- Progress Billing Entry (VMPBCENT)
- Project Billing Entry (VMPRJBNT)
- Accounts Payable Invoice Entry (VFAPIENT)
- WIP Maintenance (VMWIPMNT)

Also, where the ability to reference external documents exists in the applications listed above, users can drag and drop documents from Windows Explorer and Outlook directly into the VISUAL records.

Backlog Report

In the Backlog Report, users can choose what type of backlog data to view. Users can view the backlog data as the backlog of what is to be shipped or as what is to be invoiced.

Sales Tax Reporting and Customer Sales Journal

- In the Sales Tax Group Maintenance window, you can assign a vendor for each sales tax ID. The vendor you assign is the tax authority and collects the money withheld when the associated sales tax is applied to a transaction.
- In addition, tax information now appears on the Customer Sales Journal report. You can sort the Customer Sales Journal report by tax ID or tax authority ID (the vendor IDs used in Sales Tax Group Maintenance).
- When you select a sort order on the Customer Sales Journal report dialog, browse buttons appear, allowing you to select a start ID and end ID for the sort option you selected.

Increase Input Items from Major Reports

The user interface has not changed for the reports listed in this section. If you choose to create custom reports for the following, you can access additional database fields:

- Purchase Order Entry (VMPURENT)
- Shipping Entry (VMSHPENT)
- Invoice Generation (VMINVGEN)
- Accounts Receivable Invoice Entry (VRARIENT)
- Manufacturing Window (VMMFGWIN)
- Part Maintenance (VMPRTMNT)
- Customer Maintenance (VMCUSMNT)
- Vendor Maintenance (VMVNDMNT)
- Inter Branch Transfer Shipping Entry (VMIBTSHP)

Additional View Panels

Additional information has been added to Accounts Payable Inquiry, Accounts Receivable Inquiry, and the Material Planning window.

- The Vendor panel has been added to the Accounts Payable Inquiry and the Material Planning window. Vendor panel information includes Accounting, Payment, and Purchase From/Remit To information.
- The Customer panel has been added to the Accounts Receivable Inquiry. Customer panel information includes Accounting, Payment, and Sold To/Bill To information.

Engineering Information on Purchase Orders

- In the Purchase Order Entry window, Current Part Stage and Current Part Revision fields have been added to the purchase order lines table. The system populates these fields based on information entered on the Part Master.
- In addition, the Current Part Stage and Current Part Revision information now appears on the Purchase Order Entry reports.

Part Warehouse Lead Time

The scheduler uses the following process to determine part lead time:

- The system first looks for the lead-time on the work order requirement. If lead-time is not specified on the work order requirement, then the system looks at the part warehouse for lead-time. If the lead-time is not specified on either the work order requirement or part warehouse, then the system uses the lead-time specified for the part in Part Maintenance.

Multiple Select for Outside Purchase Services

- On the Outside Service Planning Window (VMSRVPLN), you can now purchase multiple lines at a time, rather than having to purchase each line individually.
- When you select one or more lines on the Outside Service Planning Window to purchase the service directly to a job, you can select Edit, Purchase to Job(s). Alternately, you can right-click in the table to select Purchase to Job(s) from the pop-up menu that appears. Procedures for purchasing the service have not changed.

Spell Check in Specifications and Notes Fields

Users can now check the spelling in specifications and notes fields. When users access the spell checker, the spell checker suggests possible replacements for any misspelled word. Users can add words to the dictionary as necessary.

Restructure of Infor ERP VISUAL Financials Book

Infor ERP VISUAL Financials user guides have been restructured into the following smaller, role-based books: Administrative, General Ledger, Accounts Receivable, Accounts Payable, and Cash Management. Each book includes its own table of contents and index. The guides include hyperlinked cross-references among chapters as well as books.

Infor recommends that all users of the Infor ERP VISUAL Financials application have access to the Administrative User's Guide, in addition to the User's Guide that applies to their financial role.

Other Technical Notes

- Includes a new desktop icon and new menu splash screen
- Deploys Gupta Runtime 4.0 PTF2
- Works with Microsoft Windows XP and Windows Vista client workstations
- Database Platform Options:
    - Gupta SQLBase 9.0.2 or SQLBase 11.5
    - Microsoft SQL Server 2005 or 2008
    - Oracle 9i or 10g
- Can be configured to work with Terminal Services or Citrix Servers
- VISUAL CRM Version upgrades to 6.5
- VISUAL Quality Version upgrades to 6.5
- VISUAL HR/Payroll Version upgrades to 6.5

Projects

Several enhancements to the project-related applications streamline the process of setting up, executing, and auditing projects. Additional information about the enhancements described below is found in the Infor ERP VISUAL Enterprise User's Guide for Project-Based Manufacturers and Aerospace & Defense (Project User's Guide).

Exclude Warehouse in MRP

- In Material Requirements Planning, users can now select combinations of warehouses to include in planning. In addition, users can now flag warehouses as MRP Exempt to prevent MRP from including the flagged warehouses in the planning process. The ability to designate a warehouse as MRP exempt is particularly helpful for Project/A&D users. When a project is closed, users can designate the project warehouse as MRP exempt, preventing planning from using the warehouse in the future.
- A new filter has been added to the Planning window that limits the warehouses that appear in the Warehouse drop-down menu. Users can choose to exclude MRP Exempt Warehouses from this list. Project/A&D users can choose to view project warehouses only or view warehouses assigned to a particular program manager.

Improved Project Setup

The windows and tools available in the Project menu have been reorganized to improve the process of setting up a project. Right-click menus have been expanded to improve the interconnectivity among the various project windows.

Reimbursable Cost Function

The system now maintains multiple ETCs.. You can track changes to your ETCs over time.
When you update the ETC with actual amounts, the system now allows you to choose which projects you would like to update. In previous versions, the system updated ETCs for all projects. In addition, you can now automatically update your EACs with actual amounts.
When you create a formal EAC, you have the option of inserting the figures from the informal EAC automatically.

Inter Branch Transfer within Same Warehouse

The IBT Transfer window now allows users to transfer materials within the same warehouse. In Warehouse Maintenance, users can create multiple addresses for the same warehouse, then in IBT Transfer users can transfer material from one warehouse address to another. This is particularly helpful for Project/A&D users. Since the project warehouse ID is the same as the project ID, Project/A&D users could not accurately account for the time it took to move materials. This feature is also helpful for users who have set up consignment warehouses.

Export Project Summary Data to Database Table

Users can now choose to export data generated in the Project Summary window's Print G/L Report / Inquiry window to a database table. Users can then generate custom reports from the database table.

Costing

The Project/A&D costing utilities have been streamlined and behave similarly to the costing utilities within standard Manufacturing. The new Project/A&D costing no longer depends on the previous state of transaction data. In addition, costing is now aware of retro-burden transactions, which allows users to run retro-burden multiple times within a fiscal period without losing historical data.

Retro Burden

- The changes made to retro burden processing enable easier tracking of changes to burden distributions, the ability to run retro burden multiple times during a fiscal year, and the ability to ensure that retro burden runs only on the transactions you want to reevaluate.
- If you are upgrading from a previous version, the system will attempt to break up your existing burden information by burden category. If the system cannot break up the transaction data (for example, due to changes to burden mappings), then the system will not change the burden distributions and will place UNKNOWN in the burden category ID column. If you would like to keep a record of the original burden records, Infor recommends that you back up your database prior to upgrading to 6.5.3.
- When you run retro burden, the system now records the retro-burden rate ID, period ID, rate code, and last retro date on each transactions. This preserves the proper burden amount on your transactions. When you run costing, costing uses the rate ID associated with the retro transaction instead of updating the transaction with the current Use for Actuals rate ID.
- You can view your burden distributions in the Inquiry / Print G/L Transactions window available in Project Summary. You can filter the information in the window to display only burden distribution information, and you can print reports sorted by burden category ID. Burden category information now appears on all reports printed from the Inquiry / Print G/L Transactions window.
- You now designate the "Use for Actuals" rate by period ID instead of specifying an actuals rate system-wide.
- If you want to prevent retro-burden from reevaluating transactions with a certain rate during a certain period, you can now tell the system to freeze rates. When you freeze a rate, any transaction with the frozen rate will always have the frozen rate applied, no matter how often you run retro burden.

Customer Order Summary Tab in Project Maintenance

- The Customer Order Summary tab in Project Maintenance displays the totals of the customer orders associated with the project. The tab calculates the totals in both the currency specified for the project in the Project Maintenance window and in the currency used in the original order.
- You can view the customer order line information directly from Project Maintenance by selecting Info, View Customer Orders. The lines for all customer orders associated with the project appear in the table. You can open the customer order directly from the table.

BTS Department ID and Cost Category Validation

The barcode system now validates department/cost category combinations for Project/A&D users. Users can also set up the barcode system to prompt the user to accept the default Department ID and Cost Category ID defined for a resource or to override these IDs.