



**VISUAL**  
*Enterprise*™

Release Notes Version 6.4

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This documentation corresponds to VISUAL Enterprise version 6.4

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# VISUAL Enterprise Release 6.4

## Enhancements

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Enhancements have been made to the following modules of VISUAL Enterprise:

### Copy Document References

When copying Work Orders, Quote Masters, and Engineering Masters you can now copy the Document References from the original work order or master.

### Material Planning

When creating new work orders from engineering masters during material planning, VISUAL now allows you to copy ALL of the Document References from the master to your new work order.

Material planning enhancements for version 6.4 include:

- You can request VISUAL to copy ALL Document References when generating supply orders.

For more information, refer to the Material Planning Window chapter, Volume 1, Chapter 13, Pages 27–28.

- When you are Firming or Releasing Planned Orders, you can request VISUAL to copy ALL Document References from the engineering master to the new work order.

For more information, refer to the Material Planning Window chapter, Volume 1, Chapter 13, Pages 81–83.

### Copying Customer Orders

When copying Customer Orders you can select to have VISUAL copy ALL of the document references from the original customer order.

For more information, refer to the Customer Order Entry chapter, Volume 3, Chapter 2, Pages 8–13.

### Drag and Drop

When using the drag and drop function to copy individual components or complete structures from other masters, VISUAL now copies ALL of the associated document references from the original master.

For more information, refer to the Manufacturing Window chapter, Volume 4, Chapter 5, Pages 46–47, Pages 85–86, and Pages 112–115.

### Intrastat

A new maintenance window has been added allowing you to enter additional Intrastat information.

You can now specify the following additional Intrastat information:

**Reference** – A short description or reference.

**Movement Date** – Date on which this movement takes place.

**Tariff Code / Commodity Code** – Double-click the column header and select the Tariff or Commodity code.

**Excise Price** – Cost of the Excise charge.

**Delivery Terms** – Click the drop-down arrow in the row to select the Terms of the delivery.

**Nature of Trans** – Double-click the column header and select the type of transaction to which this line refers.

**Mode of Transport** – Double-click the column header and select the type of transportation used.

**Net Mass** – Weight of the shipment.

**Supplement Unit** – Number of units.

**To Country** – Country to which the shipment is going.

**Orig Country** – Country of origin.

**From Country** – Country from which this shipment is shipped.

**Region** – Region of the country from which this shipment is shipped.

**Port of Arrival** – Name of the port in which this shipment first arrived in the country.

**Port of Transshipment** – Intermediate country used between shipping and receiving.

**Number of consignments** – Number of agents selling items in the shipment for the shipper.

For more information, refer to the Application Global Maintenance chapter, Volume 1, Chapter 3, Pages 31–32.

## Service Charge

A check box has been added on the service Charge Maintenance window allowing you to specify if you want the service charge to be included in Intrastat calculations.

For more information, refer to the Application Global Maintenance chapter, Volume 1, Chapter 3, Page 77.

## Outside Service Maintenance

A check box has been added to the Outside Service Maintenance window allowing you to specify if you want the outside service charge to be included in Intrastat calculations.

For more information, refer to the Outside Service Maintenance chapter, Volume 2, Chapter 24, Pages 4–6.

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## Deviation Reason Codes

Using Application Global Maintenance, you can now set up deviation reason codes to specify the reasons your employees use more parts than they finish.

### Setting Up Deviation Reason Codes

Set up Deviation Reason Codes using the table accessed from the Maintain menu of the Application Global Maintenance window.

#### Requiring Deviation Reason Codes

On the Defaults tab of the Application Global Maintenance window, you have the option of setting the Deviation Reason Code requirement.

For more information, refer to the Application Global Maintenance chapter, Volume 1, Chapter 3, Page 46.

#### Labor Ticket Entry

With the Require Deviation Reason Codes check box selected on the Defaults tab of the Application Global Maintenance window, VISUAL requires the entry of a Deviation Reason Code during labor ticket entry when the user enters a value for Deviated Quantity.

*Note:* This also applies to **Barcode Labor Ticket** entry.

For more information, refer to the following chapters:

- Labor Ticket Entry chapter, Volume 4, Chapter 4, Page 11.
- BTS chapter, Volume 4, Chapter 9, Pages 5, 13, and 81.

### BTS Enhancements

The Barcode Transaction System in VISUAL Enterprise now supports Return to Vendor and Dimensional Inventory requirements.

For more information, refer to the Barcode Transaction System section of the Barcode Labor Transaction chapter, Volume 4, Chapter 9, Page 18.

### Program Security

VISUAL now allows you to limit access to individual users allowing them to only enter Customer Invoices with a status of Logged.

For more information, refer to the Application Global Maintenance chapter, Volume 1, Chapter 3, Page 54.

### EDI

VISUAL now supports Warehouse Shipping Advice (WSA) electronic notifications. Within EDI, these are also known as “ANSI X12 Transaction 945 Documents.” These documents notify the shipping warehouse with information on outgoing shipments.

For more information, refer to the Data Interchange chapter, Volume 4, Chapter 16, Pages 9, 11, 26, 34, and 44.

## Customer Maintenance

You can now set the requirement for WSA (945) electronic notifications by customer.

For more information, refer to the Customer Maintenance chapter, Volume 1, Chapter 11, Page 35.

## VISUAL Supply Chain Planning

You cannot edit customer orders if you created them in VISUAL Supply Chain Planning. If you need to make changes in those orders, you must do so in VSCP. If you try to edit a VSCP order, a dialog box appears.

For more information, refer to the Customer Order Entry chapter, Volume 3, Chapter 2, Page 16.

## Logged Customer Invoices

You can set access to individual users allowing them to only enter Customer Invoices with a status of Logged.

For more information, refer to the Application Global Maintenance chapter, Volume 1, Chapter 3, Page 54.

## User Password Enhancements

In the Users dialog box, accessed from the Admin menu, you can now set the following password requirements:

- The user password must be different from the User ID
- Password retirement after a specific length of time
- To reuse passwords after a specified number of password changes

For more information, refer to the System Administration chapter, Volume 1, Chapter 2, Page 9.

## Information Accessibility

Because the tables appearing in some VISUAL windows show only part of the available information, you can now double-click on a particular line of interest to view progressively more complex information.

You can access additional information for the tables in the following windows:

- Purchase Order Entry
- Purchase Requisition Entry
- Vendor RFQ Entry
- Customer Order Entry

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- Part Maintenance
  - Customer Inquiry
  - Material Planning
  - Receivable Invoice Entry
  - Receivable Collections Window
  - Payable Invoice Entry
  - Project Window
  - Project Maintenance
  - Project Summary Window
  - Progress Billing
  - ECN Entry
  - Estimating Window
  - Order Management
  - Material Trace History
  - Cost Simulation
  - Shipping Entry

Many right-click menus have been enhanced to allow easy access to further information.

For more information, refer to the Concepts and Common Features chapter, Volume 1, Chapter 1, Page 24 and 25.

## **Outside Services Added to Cost Simulations**

You can now specify Outside Service costs when working with Cost Simulations.

For more information, refer to the Cost Simulation chapter, Volume 3, Chapter 16, Page 3.

## **Document Where Used**

Document Maintenance now has a Where Used function allowing you to view a list of where you have used your document references. If you have large lists of document references, you can search for the reference you want to view.

For more information, refer to the Document Handling chapter, Volume 1, Chapter 4, Page 6.

## **User Toolbar**

By including the UserToolbar=Y setting in your VISUAL.ini file, a toolbar appears in the VISUAL main window. You can customize the icons appearing in the toolbar to open any application you want.

For more information, refer to the Concepts and Common Features chapter, Volume 1, Chapter 1, Page 66.

## **Menu Security**

Using the Menu Security dialog in Application Global Maintenance, you can restrict, by user, access to specific applications by selecting the menus that appear on VISUAL's main window.

For more information, refer to the Application Global Maintenance chapter, Volume 1, Chapter 3, Page 83.

## **Landed Costs (VF)**

You can now include your Transportation costs as part of the inventory value of your product.

For more information, refer to your VISUAL Financials documentation.

## 6.4 Additional Functionality

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The 6.4 release of VISUAL Enterprise includes the new Workflow functionality as standard to the core product.

### Workflow

Workflow functionality enables you to create predefined conditions and rules for guiding users through specific tasks within VISUAL applications, such as Purchase Order Entry and Customer Order Entry, and track the progress of each workflow document. Embedded in the logic of VISUAL Enterprise, Workflow works behind the scenes. When you activate a workflow, all the areas of VISUAL Enterprise, as defined in the workflow, must behave in accordance with the workflow and its set of rules.

Using a workflow-based approach can help you achieve the following:

- Streamline repeatable processes.
- Define rule and condition-based processes because individuals or their knowledge of processes should not determine process flows.
- Minimize operational errors.

Using the Workflow Designer, you can assign the *steps* necessary to complete tasks and define the *rules* that govern those steps. The Designer saves the workflows you create as templates that VISUAL uses to copy to individual document Workflow IDs.

Common workflows contain:

- Process Definition
- A graphical representation of the flow of business information
- System of controls, monitors, and management tools to help automate certain aspects of your business process.

What can Workflow do for you?

- Provide a graphical representation of your processes.
- Graphically create and display the flow of work and tasks.
- Embed business logic into process in the form of rules.
- Build rules for exception handling.
- Track the status of process steps.
- Involve third-party applications to perform tasks.
- Inform users of new tasks or warn them of late tasks.
- Integrate VISUAL's Task Maintenance functionality.

For more information, refer to the Workflow chapter, Volume 3, Chapter 17.

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