

# Release 6.5.3 Notes

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### Publication Information

**Release:** Infor ERP VISUAL Enterprise 6.5.3

**Publication Date:** March 2008

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## Overview of New Features

This release focuses on the following three areas:

**Personalize** – Personalize features provide you the opportunity to tailor Infor ERP VISUAL Enterprise to reflect your company's processes and style. Personalize features include the new Audit Management window, which allows you to create an audit trail for a wide range of Infor ERP VISUAL Enterprise windows. You can pass information from VISUAL to third-party applications with the parameter passing icon. You can also export data directly from report dialogs to Microsoft Outlook or Microsoft Word so you can create one-off reports. Finally, VISUAL is integrated with Unify's Team Developer™. You can use the Object Nationalizer to change application windows to suit your needs.

**Note:** Unify Object Nationalizer must be purchased separately. It may be purchased directly from Infor. Please consult your Infor sales representative for more information.

**Productivity** – Productivity features allow you to do more with fewer key strokes. Customizable user defined fields have been added to browse tables enabling users to search for IDs based on their custom information. More application windows support the emailing of documents. The new consignment features make handling inventory that you have consigned to others or that others have consigned to you easy to track.

**Projects** – The new project features focus on streamlining the project setup process. You can now create multiple EAC and ETC versions to track changes to your costs over the life of a project. The project costing feature now employs "stateless costing" and does not depend on the previous state of the transaction.

## Upgrading from a Previous Version of Infor ERP VISUAL Enterprise

Infor strongly recommends that you install the upgrade of your application in a test environment for evaluation prior to updating the production environment.

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If you have customized code, please contact Professional Services or your Infor Channel Partner to coordinate upgrading the custom code before installing 6.5.3 into your production environment.

To successfully upgrade your database to Infor ERP VISUAL Enterprise 6.5.3, please perform the following steps:

- 1 Before upgrading to 6.5.3, run all options of costing utilities as of the current date and process and post all manufacturing journals. Make sure to post all transactions to your existing database before upgrading.
- 2 Upgrade the database to 6.5.3 using the Conversion Utility (VMCVTUTL.EXE). The Conversion Utility opens automatically when you attempt to log in to 6.5.3 using a database from a previous version of Infor ERP VISUAL Enterprise.
- 3 After upgrading to 6.5.3 and before entering any new transactions, run all options of costing utilities as of the current date again and process and post all manufacturing journals.

Performing this process will identify any transactions generated as a result of upgrading your database. You can then review these transactions and adjust them as necessary.

We recommend following this process because of the changes made to the costing utilities. The changes to the costing utilities help the utilities to deal with data changes and enhance its ability to make self-correcting entries. During upgrade, costing could produce corrective posting journals for transactions that have already been corrected by general journal adjusting entries.

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# Personalize

The "Personalize" features allow users to tailor Infor ERP *VISUAL* Enterprise to fit their needs.

## User 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.

For more information, refer to your *Infor ERP *VISUAL* Enterprise Foundation User's Guide* Volume I, chapter 1.

**Note:** Unify Team Developer Object Nationalizer must be purchased separately. It may be purchased directly from Infor. Please consult your Infor sales representative for more information.

## Manufacturing Window Font Colors

High Contrast color schemes can increase legibility for some users by heightening screen contrast with alternative color combinations.

For more information, refer to your *Infor ERP *VISUAL* Enterprise Manufacturing User's Guide Volume IV*, chapter 5.

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## 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)

For more information, refer to your *Infor ERP VISUAL Enterprise Foundation User's Guide* Volume I, chapters 8, 9, and 11.

- Customer Order Entry (VMORDENT.exe)

For more information, refer to your *Infor ERP VISUAL Enterprise Foundation User's Guide* Volume II, chapter 2.

- 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)

For more information, refer to your *Infor ERP VISUAL Enterprise Front Office User's Guide Volume III*, chapters 3, 5, 9, 12, and 14.

## Outlook Integration

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

Accounts Receivable Invoicing (VFARIENT), Receivable Inquiry (VFARCINQ).

For additional information on Financials-specific changes, refer to your *Infor ERP VISUAL Financials Administrative User's Guide*, chapter 4.

Workflow also supports the creation of tasks in the Task Maintenance window, Outlook, or both.

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For more information, refer to your *Infor ERP VISUAL Enterprise Front Office User's Guide Volume III*, chapter 18.

You can now export tasks to Outlook from within ECN Entry.

For more information, refer to your *Infor ERP VISUAL Enterprise Manufacturing User's Guide Volume IV*, chapter 12.

## Dragging and Dropping Information

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

For more information, refer to your *Infor ERP VISUAL Enterprise Foundation User's Guide Volume I*, chapter 4.

## 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.

For more information, refer to your *Infor ERP VISUAL Enterprise Foundation User's Guide Volume I*, chapter 1.

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## 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.

For additional information on the Audit Management feature, refer to your *Infor ERP VISUAL Enterprise Foundation User's Guide* Volume II, chapter 27.

## 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.

For more information, refer to your *Infor ERP VISUAL Enterprise Foundation User's Guide* Volume I, chapter 2.

## 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).

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# Productivity

The Productivity features allow users to do more with fewer key strokes.

## 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.

For more information, refer to your *Infor ERP VISUAL Enterprise Foundation User's Guide* Volume I, chapter 3.

An "Allow E-mailing" check box appears in the Document Maintenance window so that users can override the default setting for each document ID.

For more information, refer to your *Infor ERP VISUAL Enterprise Foundation User's Guide* Volume I, chapter 4.

### 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)
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For more information, refer to your *Infor ERP VISUAL Enterprise Foundation User's Guide Volume I*, chapters 9, 11, 24—*Volume II*, chapters 2 and 18—*Volume III*, chapters 9 and 12.

## 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)

For more information, refer to your *Infor ERP VISUAL Enterprise Front Office User's Guide Volume II*, chapter 3, and 1—*Volume III*, chapter 9—*Volume IV*, chapter 4.

## 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). For additional information on this report, refer to your *Infor ERP VISUAL Financials Accounts Receivable User's Guide*, chapter 5.

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## 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.

For more information, refer to your *Infor ERP VISUAL Enterprise Foundation User's Guide* Volume II, chapter 28.

## 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.

For more information, refer to your *Infor ERP VISUAL Enterprise Foundation User's Guide* Volume I, chapter 1.

## Purchase 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

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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.

For more information, refer to your *Infor ERP VISUAL Enterprise Front Office User's Guide Volume III*, chapter 20.

## 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

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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.

For additional information about the Material Planning Window changes, refer to the *Infor ERP VISUAL Enterprise Foundation User's Guide Volume I*, chapter 13.

## 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.

For additional information about the Material Planning Window changes, refer to the *Infor ERP VISUAL Enterprise Foundation User's Guide Volume I*, chapter 13.

## Manufacturing Window Child Table Totals

In the Manufacturing Window, the system now totals the columns in the following information tables:

**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.

For more information, please refer to your *Infor ERP VISUAL Enterprise Manufacturing User's Guide*, chapter 5.

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## 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.

## Work Order Printing

In the Work Order Printing dialog, users can now choose to print unreleased work orders in addition to Firmmed 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.

For more information, please refer to the *Infor ERP VISUAL Enterprise Manufacturing User's Guide*, chapter 8.

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## Implode Costs Option

When imploding costs, users can select any combination of parts for which to implode costs. For more information, please refer to the *Infor ERP VISUAL Enterprise User's Guide*, chapter 15.

## 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.

For more information, refer to your *Infor ERP VISUAL Enterprise Front Office User's Guide Volume III*, chapter 15.

## 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.

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## 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.

## 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.

For more information, refer to your *Infor ERP VISUAL Enterprise Front Office User's Guide Volume III*, chapter 18.

## 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.

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In keeping with a stand-alone program, Infor has also created a new Receiving Inspection chapter documenting the features of the program.

For more information, refer to your *Infor ERP VISUAL Enterprise Front Office User's Guide Volume III*, chapter 12.

## 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)

## 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)
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- 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.

For additional information about Referenced Documents, refer to the *Infor ERP VISUAL Financials Administration User's Guide*, chapter 4.

## 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.

For more information, refer to your *Infor ERP VISUAL Enterprise Foundation User's Guide* Volume I, chapter 1.

## 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.

For more information, please refer to the *Infor ERP VISUAL Enterprise Front Office User's Guide*, chapter 6.

## 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.

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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)

For more information on the specific field, please consult the [Major Reports Input Items Tables](#) section at the end of these release notes.

## 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 for Accounts Receivable.

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For additional information about the Inquiry information, refer to the *Infor ERP VISUAL Financials Accounts Payable User's Guide*, chapter 6, and *Infor ERP VISUAL Financials Accounts Receivable User's Guide*, chapter 7. For more information on view panels in Material Planning, refer to the *Infor ERP VISUAL Enterprise Foundation User's Guide Volume I*, chapter 1.

## 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.

For more information, please refer to the *Infor ERP VISUAL Enterprise Front Office User's Guide*, chapter 1.

## 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

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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.

For more information on the spell check feature, refer to your *Infor ERP VISUAL Enterprise Foundation User's Guide Volume I*, chapter 1.

## 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.

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## 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.

For more information, refer to the Project User's Guide, chapter 4, and your *Infor ERP VISUAL Enterprise Foundation User's Guide Volume I*, chapter 13.

### Improve 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. For a snapshot of the new window locations, please consult the chart below:

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Maintenance Window/Table	Location Prior to 6.5.3	Location in 6.5.3	Notes
Contract Type Codes	Project Codes menu in Application Global Maintenance	Maintain menu in Project Maintenance	
Division Codes	Project Codes menu in Application Global Maintenance	Maintain menu in Project Maintenance	
Business Line Codes	Project Codes menu in Application Global Maintenance	Maintain menu in Direct Cost G/L Burden Mapping Maintenance	
Priority Codes	Project Codes menu in Application Global Maintenance	Maintain menu in Project Maintenance	
Project Type Codes	Project Codes menu in Application Global Maintenance	Maintain menu in Project Maintenance or Maintain menu in Direct Cost G/L Burden Mapping Maintenance	

Maintenance Window/Table	Location Prior to 6.5.3	Location in 6.5.3	Notes
Department Codes	Accounting Maintenance in Application Global Maintenance	Accounting Maintenance in Application Global Maintenance or Maintain menu in Direct Cost G/L Burden Mapping Maintenance	
Security Class Codes	Project Codes menu in Application Global Maintenance	Maintain menu in Project Maintenance	
Summary Codes	Project Codes menu in Application Global Maintenance	Maintain menu in Project Maintenance	
Cost Groups	Maintain menu in Project Summary	Maintain menu in Direct Cost G/L Burden Mapping Maintenance	The Direct Cost G/L Burden Mapping Maintenance window is available from the Project menu
Cost Categories	Project Summary	Maintain menu in Direct Cost G/L Burden Mapping Maintenance	The Direct Cost G/L Burden Mapping Maintenance window is available from the Project menu

Maintenance Window/Table	Location Prior to 6.5.3	Location in 6.5.3	Notes
Burden Categories	Project Summary	Maintain menu in Direct Cost G/L Burden Mapping Maintenance	The Direct Cost G/L Burden Mapping Maintenance window is available from the Project menu
Burden Groups	Project Summary	Maintain menu in Direct Cost G/L Burden Mapping Maintenance	The Direct Cost G/L Burden Mapping Maintenance window is available from the Project menu
General Ledger/Burden Mapping	Project Summary	Maintain menu in Direct Cost G/L Burden Mapping Maintenance	The Direct Cost G/L Burden Mapping Maintenance window is available from the Project menu
Rate IDs	Maintain menu in Rate Maintenance	Maintain menu in Rate Management	
Period IDs	Maintain menu in Rate Maintenance	Maintain menu in Rate Management	
Rate Tables	Rate Maintenance	Rate Management	
Distribution Codes	Distribution Code Maintenance	Maintain menu in Project Summary	Distribution Code Maintenance is no longer a Project menu selection.

Maintenance Window/Table	Location Prior to 6.5.3	Location in 6.5.3	Notes
WBS Codes	WBS Maintenance	WBS Code tab in Project Maintenance or in the Project window Project Header Card	WBS Maintenance is no longer a Project menu selection.
Earned Value	Calculate Earned Value Quantities, Edit menu in Project Summary	Edit menu in Project Summary	Calculate Earned Value Quantities is no longer a Project menu selection. Calculate Earned Value Amounts and Calculate Earned Value Quantities are consolidated on one window.
Percentage of Completion Values	Info menu in Project Maintenance	Info menu in Project Summary	
Baseline/EAC Comparison	Info menu in Project Maintenance	Info menu in Project Summary	
Rate Change Impact Analysis	Rate Change Impact Analysis	Rate Management	Rate Change Impact Analysis is no longer a Project menu selection

For more information, please refer to your Project User's Guide, chapters 2 and 3.

## 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.

For more information, refer to the Project User's Guide, chapter 7.

## 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.

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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.

For more information, refer to the Project User's Guide, chapter 5.

## 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. For more information, refer to the Project User's Guide, chapter 4, the *Infor ERP VISUAL Enterprise Foundation User's Guide Volume II*, chapter 17, and the *Infor ERP VISUAL Enterprise Foundation User's Guide Volume II*, chapter 18.

## 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.

For more information, please refer to your Project User's Guide, chapter 6.

## 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.

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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.

For more information, please refer to your Project User's Guide, chapter 3.

## 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.

## 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. For more information, refer to the Project User's Guide, chapter 4.

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## Major Reports Input Items Tables

The tables below list the additional fields available for custom reports. For more information on this feature, please see Increase [Input Items from Major Reports](#).

### Purchase Order Entry (VMPURENT)

The following QRP output files reflect changes to Purchase Order Entry:

- VMPURFM2
- VMPURFM1
- VMPURVAT
- VMPURFRM

The following additional items are available for custom reports:

Database Table	Database Column	Field/Column Name
shipto_address	LN_SHIPTO_ADDR_1	Name (from PO Line)
	LN_SHIPTO_ADDR_2	Address
	LN_SHIPTO_ADDR_3	
	LN_SHIPTO_ADDR_4	
	LN_SHIPTO_ADDR_5	City
	LN_SHIPTO_ADDR_6	State
	LN_SHIPTO_ADDR_7	Zipcode
	LN_SHIPTO_ADDR_8	Country
	PO_SHIPTO_CITY	City
	PO_SHIPTO_STATE	State
	PO_SHIPTO_ZIPCODE	Zipcode

Database Table	Database Column	Field/Column Name
vendor_address	PO_VENDOR_CITY	City
	PO_VENDOR_STATE	State
	PO_VENDOR_ZIPCODE	Zipcode
application_global	COMP_NAME	Company Name
	COMP_ADDR_1	Address (Your company address)
	COMP_ADDR_2	
	COMP_ADDR_3	
	COMP_CITY	City (Your company city)
	COMP_STATE	State (Your company state)
	COMP_ZIPCODE	Zipcode (Your company zipcode)
	COMP_COUNTRY	Country (Your company country)
purchase_order	TERMS_DESCRIPTION	Terms

### Shipping Entry (VMSHPENT)

The following QRP output files reflect changes to Shipping Entry:

- VMSHPFM1
- VMSHPFRM

The following additional items are available on custom reports:

Database Table	Database Column	Field/Column Name
shipper_line	SL_NMFC_CODE_ID	NMFC Code
	SL_PACKAGE_TYPE	Package Type

Database Table	Database Column	Field/Column Name
	SL_PALLET_COUNT	Pallet Count
	SL_SHIPPING_UM	Shipping Unit of Measure
	SL_PIECE_COUNT	Piece Count
	SL_LENGTH	Length
	SL_WIDTH	Width
	SL_HEIGHT	Height
	SL_DIMENSIONS_UM	Dimension Unit of Measure
	SL_RMA_ID	RMA ID
	SL_RMA_LINE_NO	RMA Line Number
	CO_LINE_NO	Shipper Line Number
part	P_DRAWING_ID	Drawing ID
	P_DRAWING_REV_NO	Drawing Revision Number
customer	C_VAT_REGISTRATION	VAT Registration Number
carrier	C_CARRIER_ADDR_1	Name (carrier name)
	C_CARRIER_ADDR_2	Address (carrier address)
	C_CARRIER_ADDR_3	
	C_CARRIER_ADDR_4	
	C_CARRIER_ADDR_5	City (carrier city)
	C_CARRIER_ADDR_6	State (carrier state)
	C_CARRIER_ADDR_7	Zipcode (carrier zipcode)
	C_CARRIER_ADDR_8	Country (carrier country)
	C_CARRIER_VAT_REG	VAT Registration

## Invoice Generation (VMINVGEN)

The following QRP output files reflect changes to Invoice Generation:

- VMINVVAT
- VMINVFM1
- VMINVFRM

The following additional information is available for custom reports:

Database Table	Database Column	Field/Column Name
carrier	CARRIER_ADDR	Carrier Address
customer	CO_SELL_TO_ADDR_1	Name
	CO_SELL_TO_ADDR_2	Address (1, 2, 3)
	CO_SELL_TO_ADDR_3	
	CO_SELL_TO_ADDR_4	
	CO_SELL_TO_ADDR_5	City
	CO_SELL_TO_ADDR_6	State
	CO_SELL_TO_ADDR_7	Zipcode
	CO_SELL_TO_ADDR_8	Country
customer_order	CUST_ORDER_DATE	Customer Order Date
	CO_CURRENCY_ID	Currency
part	DRAWING_ID	Drawing ID
	DRAWING_REV_NO	Revision Number
receivable	PREPAY_INVOICE_ID	Prepaid Invoice ID
receivable_line	LN_VAT_CODE	VAT Code

Database Table	Database Column	Field/Column Name
shipper	SHIPPER_LONG_DESCRIPTION	Description
vat	LN_VAT_DESCR	Description (VAT Line_

### Accounts Receivable Invoice Entry (VFARIENT)

The following QRP output file reflects changes to A/R Invoice Entry:

- VFINVVAT

The following additional information is available for custom reports:

Database Table	Database Column	Field/Column Name
carrier	CARRIER_ADDR	Address (Carrier)
cust_order_line	CO_LINE_USER_1	Customer Line User Defined 1-10
	CO_LINE_USER_2	
	CO_LINE_USER_3	
	CO_LINE_USER_4	
	CO_LINE_USER_5	
	CO_LINE_USER_6	
	CO_LINE_USER_7	
	CO_LINE_USER_8	
	CO_LINE_USER_9	
	CO_LINE_USER_10	
customer_order	CO_USER_1	Customer Order User

Database Table	Database Column	Field/Column Name
	CO_USER_2	Order User Defined 1-10
	CO_USER_3	
	CO_USER_4	
	CO_USER_5	
	CO_USER_6	
	CO_USER_7	
	CO_USER_8	
	CO_USER_9	
	CO_USER_10	
part	DRAWING_ID	Drawing ID
	DRAWING_REV_NO	Revision Number
receivable	TOTAL_AMOUNT	Total
	PREPAY_INVOICE_ID	Invoice ID
	CURRENCY_ID	Currency ID
recv_memo_apply	INV_INVOICE_ID	Invoice ID
shipper	SHIPPER_LONG_DESCRIPTION	Description (Shipper)
shipper_line	SHIPPER_LN_LONG_DESCRIPTION	Description

### Manufacturing Window (VMMFGWIN)

The following QRP output files reflect changes to the Manufacturing Window:

- VMENGRP2
- VMENGRP1

The following additional information is available for custom reports:

Database Table	Database Column	Field/Column Name
part	STOCK_UM	Stock Unit of Measure
	AUTOBACKFLUSH	Backflush
	RQ_PART_DESCRIPTION	Description (requirement part)
requirement	ISSUED_QTY	Issue Quantity
	RQ_PART_ID	Part ID (requirement part)

### Part Maintenance (VMPRTMNT)

The following QRP output file reflects changes to Part Maintenance:

- VMWHRUSD

The following additional information is available for custom reports:

Database Table	Database Column	Field/Column Name
requirement	CALC_QTY	Calculated Quantity

### Customer Maintenance (VMCUSMNT)

The following QRP output file reflects changes to Customer Maintenance:

- VMCUSRP1

The following additional information is available for custom reports:

Database Table	Database Column	Field/Column Name
customer	BACKORDER_FLAG	Backorder
	CARRIER_ID	Carrier ID
	CREDIT_LIMIT	Credit Limit
	CREDIT_LIMIT_CTL	Credit Limit Control
	DEF_RECV_ACCT_ID	Receivables Account ID
	DISCOUNT_CODE	Discount Code
	LAST_ORDER DATE	Last Order Date
	MODE_OF_TRANSPORT	Mode of Transport
	NATURE_OF_TRANS	Nature of Transaction
	OPEN_DATE	Open Date
	OPEN_ORDER_COUNT	Open Orders
	OPEN_RECV_COUNT	Open Receipts
	RECV_AGE_LIMIT	Receivable Age Limit
	TOTAL_OPEN_ORDERS	Total Open Orders
	TOTAL_OPEN_RECV	Total Open Receipts
	TRANS_CODE	Transaction Code
	USER_DEF_1	User Defined 1-10
	USER_DEF_2	
	USER_DEF_3	
	USER_DEF_4	
	USER_DEF_5	

Database Table	Database Column	Field/Column Name
	USER_DEF_6	
	USER_DEF_7	
	USER_DEF_8	
	USER_DEF_9	
	USER_DEF_10	
	VAT_BOOK_CODE_I	VAT Book Code – Invoice
	VAT_BOOK_CODE_M	VAT Book Code – Memo
	VAT_REGISTRATION	VAT Registration
	ARRIVAL_CODE	Arrival Code
	COUNTRY_ID	Country
	RMA_REQUIRED	RMA Required
	TERMS_DESCRIPTION	Terms Description

## Vendor Maintenance (VMVNDMNT)

The following QRP output file reflects changes to Vendor Maintenance:

- VMVMDRP1

The following additional information is available for custom reports:

Database Table	Database Column	Field/Column Name
vendor	TERMS_DESCRIPTION	Terms Description
	ARRIVAL_CODE	Arrival Code
	COUNTRY_ID	Country

Database Table	Database Column	Field/Column Name
	DATE_OF_BIRTH	DOB
	DEF_EXP_ACCT_ID	Default Expense Account ID
	DEF_EXP_GL_ACCT_ID	Default Expense G/L Account ID
	DEF_PAYB_ACCT_ID	Default Payable Account ID
	LAST_ORDER_DATE	Last Order Date
	MATCH_HIGH_PCT	Match High Percent
	MATCH_LOW_PCT	Match Low Percent
	MATCH_TYPE	Match Type
	MODE_OF_TRANSPORT	Mode of Transportation
	MODIFY_DATE	Modified Date
	NATURE_OF_TRANS	Nature of Transshipment
	OPEN_DATE	Open Date
	OPEN_ORDER_COUNT	Open Orders
	OPEN_PAYB_COUNT	Open Payables
	PAYEE_REF_CODE	Payee Reference Code
	PAYMENT_METHOD	Payment Method
	PLACE_OF_BIRTH	Place of Birth
	PRIORITY	Priority
	SEX	Sex
	SIRET_NUMBER	Siret Number

Database Table	Database Column	Field/Column Name
	SOCIAL_SECURITY_NUMBER	SSN
	STATE_OF_BIRTH	State of Birth
	TOTAL_OPEN_ORDERS	Total Open Orders
	TOTAL_OPEN_PAYB	Total Open Payables
	TRANS_CODE	Transaction Code
	TYPE	Type
	USER_DEF_1	User Defined 1-10
	USER_DEF_2	
	USER_DEF_3	
	USER_DEF_4	
	USER_DEF_5	
	USER_DEF_6	
	USER_DEF_7	
	USER_DEF_8	
	USER_DEF_9	
	USER_DEF_10	
	VAT_BOOK_CODE_I	VAT Book Code – Invoices
	VAT_BOOK_CODE_M	VAT Book Code – Memos
	VAT_REGISTRATION	VAT Registration
	WITHHOLDING_CODE	Withholding Code

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## Inter Branch Transfer Shipping Entry (VMIBTSHP)

The following QRP output file reflects changes to Inter Branch Transfer Shipping Entry:

- PMIBTTRD

The following additional information is available for custom reports:

Database Table	Database Column	Field/Column Name
application_global	COMPANY_ADDR_1	Name
	COMPANY_ADDR_2	Address (1, 2, 3)
	COMPANY_ADDR_3	
	COMPANY_ADDR_4	
	COMPANY_ADDR_5	City
	COMPANY_ADDR_6	State
	COMPANY_ADDR_7	Zipcode
	COMAPNY_ADDR_8	Country
	COMPANY_VAT_REGISTRATION	VAT Registration
ibt_shipper	FREE_ON_BOARD	FOB
	SHIP_VIA	Ship Via
	SHIP_LONG_DESCRIPTION	Description
ibt_shipper_line	LN_PACKAGE_TYPE	Package Type
	TOTAL_CARTON_COUNT	Carton Count (total)
	LN_CARTON_COUNT	Carton Count (line-specific)
	LN_SHIPPING_WEIGHT	Shipping Weight

Database Table	Database Column	Field/Column Name
	LN_SHIP_LONG_DESCRIPTION	Description

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