



Infor ERP VISUAL Enterprise 7.0.0

# Release Notes

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# Contents

- Compatibility .....6**
  - Compatibility with other VISUAL products ..... 7
  - Upgrading from a previous version of VISUAL..... 7
  
- Overview of Major New Features.....8**
  
- Interface Update.....10**
  - Themes ..... 10
  - Updated Toolbar Buttons ..... 11
  - Required Fields..... 13
  - Personal Menu Interface ..... 13
  - Graphical User Interface Colors ..... 13
  
- Manufacturing enhancements .....14**
  - Manufacturing Window Graphical Display Options ..... 14
  - Manufacturing Window Grid Display ..... 14
  - Scrolling in the Manufacturing Window ..... 15
  - Creating part locations on-the-fly ..... 15
  - Obsolete Resources ..... 15
  - Applying ECNs to in-process work orders..... 15
  - Reference Designators ..... 15
  - Alternate Parts ..... 16
  - Negative Quantity Costing Options ..... 16
  - Predecessor Scheduling ..... 16
  - Transfer Reasons ..... 17
  - Leg Updater ..... 17
  - Scheduling a set of work orders..... 18
  - Other Manufacturing-related Improvements ..... 18
  
- Project Enhancements .....19**
  - Creating part locations on-the-fly ..... 19

Viewing project information in the Scheduling Window .....	19
Linking quotes to projects .....	19
<b>Efficiency Enhancements .....</b>	<b>20</b>
Recently Used Records List.....	20
Life Cycle Document Viewer .....	20
Enterprise-wide Search.....	21
Interface enhancements in the Scheduling Window .....	21
At-a-glance Enhancements.....	22
Color Coding in the Material Planning Window.....	22
Shipping status indicator.....	22
Evaluating Customer Credit.....	23
Task notification in the Windows Task Tray.....	23
Document Reference Indicator .....	23
Purchase Contracts .....	23
Sorting information in tables.....	24
Document References .....	24
Closing Purchase Order Lines Short.....	24
Scheduled Finish Date.....	24
Currency Change Notification .....	25
Accessing Purchase Receipt Entry from Purchase Order Entry .....	25
Accessing Shipping Entry from Customer Order Entry .....	25
Costs and Scheduling Availability in Quick Quote.....	25
Next Line Statement in Workflow .....	25
Other Efficiency Enhancements.....	26
<b>Accounting Processes Improvements.....</b>	<b>27</b>
Terms Maintenance .....	27
XML Payment Export Formats.....	27
Exporting document postings to Excel .....	27
Allowing Duplicate A/P Checks .....	27
Sales tax by Part ID .....	28
Actual and rounded purchase order receipt unit price information.....	28
Invoice totals in accounts payable and accounts receivable.....	28
Partial Shipments and Pre-invoicing .....	28
Line types in Accounts Receivable Invoice Entry.....	29
Suppressing Customer Statements .....	29
Viewing manual payments in Payables Inquiry.....	29
Other Accounting Process Improvements.....	29

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<b>Administrative Improvements</b> .....	<b>31</b>
Preferences Maintenance .....	31
Security Maintenance .....	31
Displaying Licensed Components.....	33
Named User License .....	33
Customizable User-Defined Fields.....	33
Auditing Report Times .....	33
Unit of Measure Maintenance .....	34
Excluding Buyers from purchasing from vendors.....	34
<b>Performance Improvements</b> .....	<b>35</b>
<b>Documentation improvements</b> .....	<b>36</b>
<b>Double Byte Conversion</b> .....	<b>38</b>
<b>Known Issues</b> .....	<b>39</b>
Display Issues.....	39
Issues in Scheduling Window .....	39
Issue with Window Editor.....	39
Customizable User-defined Fields in Reports.....	39
Issue with Using Send in Microsoft Excel .....	39

# Compatibility

Infor ERP VISUAL Enterprise 7.0.0 is compatible with the following database engines:

- SQLServer 2005 – 32 bit
- SQLServer 2008 – 32 bit
- SQLServer 2008 R2 – 64 bit
- Oracle 10g (10.2) – 32 bit
- Oracle 11g (11.2) – 32 bit and 64 bit

VISUAL Enterprise 7.0.0 is **not** compatible with SQLBase.

VISUAL Enterprise 7.0.0 is compatible with the following client operating systems:

- Windows XP SP3
- Windows 7 – 64 bit

VISUAL Enterprise 7.0.0. is compatible with the following server operating systems:

- Windows 2003 – 32 bit
- Windows 2008 – 32 bit
- Windows 2008 R2 – 64 bit

VISUAL Enterprise 7.0.0 is compatible with the following third-party applications:

- Office 2007
- Office 2010 – 32 bit
- AutoCAD 2011
- Crystal Reports 2008
- Loftware
- MPC 5.1.112
- Synoptix version 6
- Microsoft Internet Explorer 7 and 8
- Microsoft SharePoint 2010

Make sure you use the Infor-supplied PROFUIS283U\_TD.DLL. We have customized the file to create some of the interface updates.

## Compatibility with other VISUAL products

VISUAL Enterprise 7.0.0. is **not** compatible with the following VISUAL products:

- Infor ERP VISUAL Quality 6.5.3
- Infor EPR VISUAL Enterprise for .NET 7.2, build issued in December 2010 or earlier
- Infor ERP VISUAL CRM 6.5.x

When these VISUAL products have been updated to be compatible with VISUAL Enterprise 7.0.0, Infor will send notifications.

## Upgrading from a previous version of VISUAL

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

If you have customized code, please contact Professional Services or your Infor Channel Partner to coordinate upgrading the custom code before installing 7.0.0 into your production environment.

To successfully upgrade your database to Infor ERP VISUAL Enterprise 7.0.0, log in to 7.0.0 using a database from a previous version of Infor ERP VISUAL Enterprise. The system prompts you to update your database and launches the Conversion Utility. The Conversion Utility executes all changes to the database schema for 7.0.0.

During the upgrade process, the system examines the payment terms currently in use in your database and creates new terms IDs. The system then inserts the proper ID in the new terms fields.

# Overview of Major New Features

VISUAL Enterprise 7.0.0 introduces a multitude of new features to update the look and feel of the system, improve the Manufacturing Window, enhance Project processes, increase efficiency, improve accounting processes, and expand administrator privileges.

The major new features described below make up just a portion of the new enhancements introduced in VISUAL Enterprise 7.0.0. For more detailed information about each new feature, consult the user documentation.

**New interface options** – The VISUAL interface has been modernized, and you can choose from two themes: the default blue theme and a turquoise theme. The button icons are also new, and field labels are realigned. In addition, you have more control over the graphical window display and can choose between two styles of personal menu.

**Manufacturing Window improvements** – The improvements to the Manufacturing Window include new interface features and new functions. The major new features are:

**Grid Display** – You can choose to view masters in a grid display. You can edit much of the master information directly in the grid. In addition, you can export the grid to Microsoft Excel. You can edit the information in Excel, then import it back to the Manufacturing Window.

**Other Interface Enhancements** – In the Graphical view, you can choose to view the cards from the bottom of the window up or from the top of the window down. You can scroll in the graphical view by clicking your mouse button and dragging the window.

**Reference Designators** – If you manufacture products that have X-Y coordinates, such as a motherboard, you can now specify the X-Y coordinate location of a specific material on the material requirements card.

**Alternate Parts** – You can specify acceptable alternate parts that can be used in place of the original material requirement. You specify alternate parts in Part Maintenance or in the Engineering Master. If you would like to use an alternate part in place of a material requirement on a work order, you can use Inventory Transaction Entry to issue the alternate part to a work order, provided that the alternate part has the same stock unit of measure as the original part. You can also replace materials in the Material Planning Window with alternate parts.

**Master/Leg Updater** – When you make a change to an engineering master, you can use the Master Updater to change all of the other masters where the engineering master is used. When you make a change to a work order or quote, you can use the Leg Updater to change the original master.

**Project Enhancements** – The Project enhancements integrate your projects more seamlessly into other areas of VISUAL. You can formally associate a quote in the Estimating Window with a project. In addition, you can filter the Scheduling Window to view project-related information only. You can also add project warehouse part locations on the fly in the Project Window.

**Efficiency Enhancements** – Several new features help you to access and process information more quickly. Major efficiency enhancements include:

**Recently Used File List** – You can set up a recently used file list that you can use in several applications. You can use the recently used file list to re-open a recent file.

**Lifecycle Document Viewer** – Use the Lifecycle Document Viewer to track your sales process from quote to cash receipt and your purchasing process from purchase requisition to payment. You can easily access the various documents that make up an individual sale or purchase.

**At-a-glance indicators** – Several new icons and other indicators in a variety of windows inform you at-a-glance if a customer is credit worthy, you have enough materials on hand to fulfill a customer order, you have a task in Task Maintenance, or if a document reference is attached to a record.

**Enterprise-wide search** – Use the new search toolbar to find information in your VISUAL database. Enter a search term, and the system lists records where your search term is found.

**Scheduling Window interface enhancements** – The colors used in the scheduling window have been updated, and you can filter the information in the window in several ways. You can also use your mouse to zoom in, zoom out, and scroll.

**Purchase Contracts** – You can create a formal contract ID to use when your vendors provide you quotes. You can use this ID in purchase orders and purchase requisitions to accurately price the items in the line table.

**Accounting Processes Enhancements** – Several new accounting processes enhancements standardize and streamline the system. Major new accounting process enhancements include: new terms IDs to use on invoices and other records, the ability to assign sales tax groups to parts, and a new XML payment format you can use with SEPA credit transfers.

**Administrative Enhancements** – The new administrative enhancements help you to control how your users run VISUAL and to track information about your VISUAL install. Major new administrative enhancements include: a redesigned Security Maintenance window where you can build security profiles and assign them to users, a new dialog box that lists all VISUAL components you are licensed to use, and a new Named User license type.

# Interface Update

**Note:** Make sure you use the Infor-supplied PROFUIS283U\_TD.DLL. We have customized the file to create some of the interface updates. The VISUAL installer places the proper version on your system.

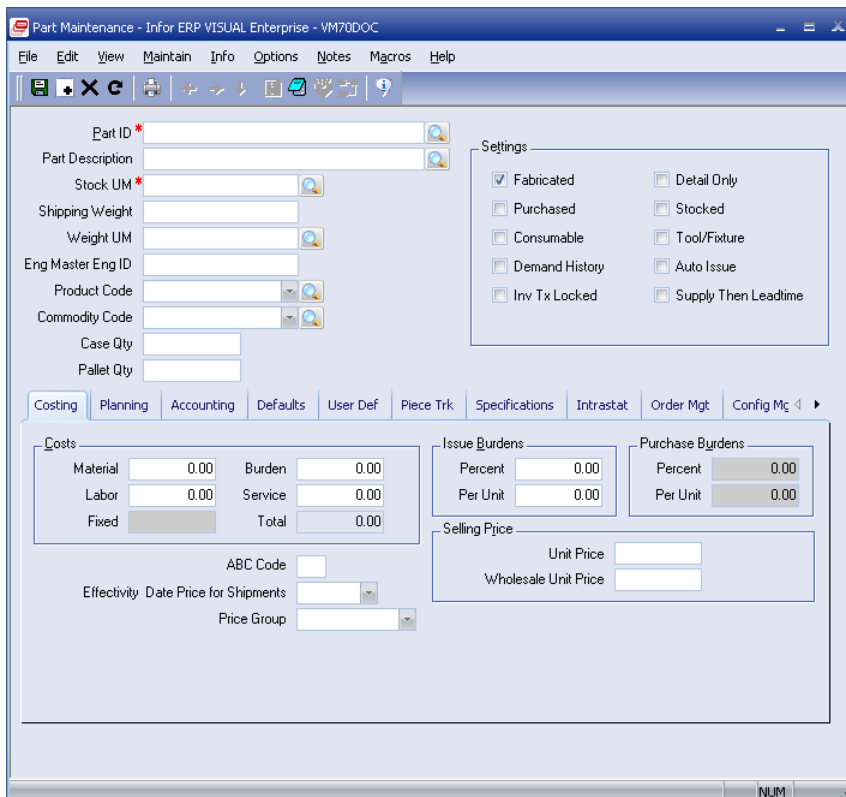
We recommend using 1024 x 768 as your screen resolution. If you use a different resolution, the system may not display windows properly.

We also recommend using the Silver Microsoft Windows theme.

## Themes

You can choose from the default blue theme and the turquoise theme. The buttons, tabs, and other objects in the windows have been updated.

This is the Part Maintenance window in the default interface:



This is the Part Maintenance window in the Turquoise theme:

In both themes, field labels are right-justified, and the browse and drop-down buttons are to the right of the field.

Note that your theme choice does not apply to:

- Message dialog boxes, such as prompts to save records.
- Spell check dialog boxes
- Workflow
- Online help
- Text on buttons in the Print Setup dialog (available on most reports). The text on these buttons is black.
- In reports, the Go to Page dialog box. This dialog box is in the "luna blue" color scheme.

VISUAL does not control the interface in these areas.

## Updated Toolbar Buttons

The icons on the toolbar buttons have been updated. The most common toolbar buttons are displayed below.



– Save



– New



– Delete



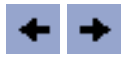
– Refresh



– Send to



– Print



– Previous Record in Set/Next Record in Set



– Next ID



– Documents



– Notations



– Specifications



– Insert



– Delete



– Repeat Row Information



– Check Spelling

The following buttons are used in many browse tables:



– Select



– Select and Close



– Quick Filter



– Reset Filter



– Search



– Send to Excel



– Import from Excel

## Required Fields

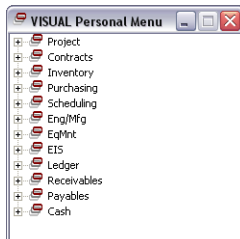
The system marks certain fields with red asterisks. The asterisk indicates that you must enter a value in the field before you can save the record.

The system marks only those fields that are always required. Some fields become required fields based on database settings or based on data that you enter in a window. The system will not mark required fields in the following cases:

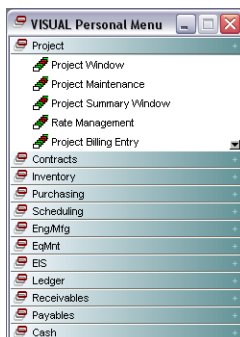
- Fields that have a default value that cannot be cleared. For example, in Purchase Order Entry, the Status field is required, but since it is always populated with a value the system does not mark the field.
- Fields that become required based on the data you enter. For example, in the Part Maintenance window, if you select the Inventoried Using Piece Tracking check box, you must enter a value in the Dimensions U/M field.
- Fields that are required based on your settings. For example, if you use a VAT-enabled database, you must enter values in VAT-related fields.

## Personal Menu Interface

You can choose from two styles of Personal Menu. When you set up the Personal menu, select the Tree View option to display the personal menu groups in a Windows Explorer-style pane.



Clear the Tree View option to display the personal menu groups in bars.



## Graphical User Interface Colors

When you set up headings for the Graphical User Interface, you can choose a background color for the buttons and a text color for the text on the buttons.

# Manufacturing enhancements

## Manufacturing Window Graphical Display Options

If you use the graphical view, you can choose how to display the objects in the view. You can display the cards from the top down or from the bottom up. For the top-down option, you can also choose to display header cards behind their operation and material cards or in front of their operation and material cards.

## Manufacturing Window Grid Display

A new display option, the Grid display, has been added to the Manufacturing Window.

In the grid display, the master is displayed in a table. The header is displayed in the first row. Operations, legs, and materials are displayed in subsequent rows. Like the Text display, information in the table is indented to show the relationship among operations, legs, and materials. Operations are indented under their associated legs, and materials are indented under their associated operations.

The grid display shows more of the information entered in the master, leg, operation, and material dialog boxes than the text and graphical displays show. As a result, if you choose the Grid Display option, the system will take longer to load the information into the Manufacturing Window.

Not all columns in the Grid display table apply to all of the objects in the table. For example, Operations do not use Part IDs, so the Part ID column does not apply to Operations. You can choose how you want the system to indicate that a column does not apply to a particular object using the Grid View Display Options dialog box.

If you use the Grid display, you can export the information from the grid into Microsoft Excel. You can also import information from Excel into the grid display provided that your Excel spreadsheet is formatted properly.

You can also edit or insert master information directly in the Grid display. If you choose to enter information directly into the Grid display, you should still access the Header, Leg, Operation, and Material Requirements dialog boxes to complete all pertinent information.

## Scrolling in the Manufacturing Window

In the Graphical and Text displays, you can place your cursor in a blank part of the window, click and hold down the button, and drag the window to scroll to a new area.

## Creating part locations on-the-fly

You can create a new location in a warehouse directly from the Assign Parts to Warehouse dialog box in the Manufacturing Window. Specify a new location in the Location ID field. When you click Save, the system asks if you want to add the new location to the warehouse. Click Yes to add the new location.

You can use this feature only if you have cleared the Not Allowed option in the Part Location on the Fly check box in Application Global Maintenance.

## Obsolete Resources

If you no longer use a shop resource in production, you can mark the resource obsolete in Shop Resource Maintenance. When you mark a shop resource obsolete, you can no longer use the resource in engineering masters or quotes. You can choose to allow users to continue to report labor against the obsolete resource in Labor Ticket Entry only. If you do allow users to report labor against an obsolete resource, the system warns the user that the resource is obsolete when the user selects it. You can also choose to prevent users from reporting labor against an obsolete resource.

Users cannot report labor against an obsolete resource in wedge Barcode or BTS.

## Applying ECNs to in-process work orders

You can choose to apply engineering change notices (ECNs) to in-process work orders, provided that the ECN does not affect an operation that has labor reported against it or materials issued to it. Select the Allow application of ECN to unreported reqs to in-process work orders check box in Application Global Maintenance to allow changes to be made to in-process work orders.

## Reference Designators

Use the new Ref Designator tab on the Material card in the Manufacturing Window to specify the location where the material in the requirement should be placed. The Ref Designators tab is especially useful if you are working with circuit boards or some other object where you can specify location with an XY coordinate.

You can enter a reference designator for each instance of the part on the material card. For example, if you use 5 Part A's on a material card, you can specify 5 reference designators. If you attempt to enter more than or less than 5 reference designators, the system warns when you save the reference designators.

You can choose to copy reference designators when:

- Copying a master in the Manufacturing Window

- Copying a quote in the Estimating Window
- Placing a work order in the Planning Window
- Generating a customer order from a quote.

You can also choose to print the reference designators on work order travelers. The system copies the reference designators automatically if you process a work order from Unplanned Maintenance. In addition, the reference designators have been added to the Engineering Report.

## Alternate Parts

Alternate parts can be used in place of the current part in engineering masters, quote masters, and work orders. You can specify default alternate parts in Part Maintenance. Click the Alternate Parts button on the Configuration tab to specify the parts that can be used in place of the selected part.

You can tailor the list of eligible alternate parts on a master-by-master basis in the Manufacturing Window. When you specify a part that has alternate parts in the material requirement card, the system inserts the default list of alternates from the Part Master on the Alternate Part tab. You can delete and add parts to the Alternate Part tab. The system deletes and adds alternate parts from the master only; it does not remove or add parts from the default list in Part Maintenance.

When you issue an alternate part to a work order in Inventory Transaction Entry, the system creates a new material card for the alternate part. The new material card is identified as an alternate part and references the original material card. On the original material card, the system inserts the quantity of alternate part issued for the requirement on the Alternate Parts tab. The alternate part you choose in Inventory Transaction Entry must have the same stock unit of measure as the original part.

You can use the Material Planning Window to replace a material requirement with one of its alternate parts. When you replace a requirement in the Material Planning Window, the system overwrites the part ID and usage UM in the original material requirement and with the alternate part ID and usage UM. When you use this function, the alternate part stock unit of measure does not need to match the stock unit of measure of the part it replaces.

You can choose to allow or prevent the use of alternate parts on a master-by-master basis. Select the Allow Alternate Parts check box on the master header card to allow the use of alternate parts; clear the check box to prevent the use of alternate parts.

## Negative Quantity Costing Options

You can allow inventory to reach a negative quantity in your warehouses or warehouse locations. You can choose to allow locations and warehouses to reach a negative quantity, to allow locations but not warehouses to reach a negative quantity, or to allow neither locations nor warehouses to reach a negative quantity. Specify your choice on the Costing tab in Application Global Maintenance.

## Predecessor Scheduling

You can specify a predecessor operation on the Other tab of the Operation card in the Manufacturing Window. The operation that you specify as the predecessor operation must be

scheduled to be complete before work can be scheduled to start on the selected operation. For example, if you specify 4/20 as the predecessor operation of operation 5/10, then operation 4/20 must be scheduled to be complete before work is scheduled to start on operation 5/10.

You can specify any operation as the predecessor of another operation provided that the predecessor operation is not in the same sub ID structure. If you specify a predecessor operation that would result in a loop, the system prevents you from saving the predecessor operation. For example, if you specify 4/20 as the predecessor operation of operation 5/10, you could not successfully specify 5/10 as the predecessor of 4/20.

When the system schedules the work order, the system schedules the predecessor operation before the selected operation.

You can view the predecessor operations defined on a work order or engineering master. Select Info, Predecessor Operations. The system displays operations along with their predecessors.

## Transfer Reasons

You can specify a reason that you are transferring inventory between locations. You set up the transfer reasons in the Reasons Maintenance table in Application Global Maintenance. For each reason you add to the table, you can specify whether the reason applies to issues, returns, transfers, or some combination of inventory transactions.

In Inventory Transaction Entry, you can then specify a reason for the inventory transfer.

You can require users to enter a reason code for all transfers. Select the Require Transfer Reason for All Transfers in the Defaults tab of Application Global Maintenance.

## Leg Updater

When you change an engineering master, you can use the Leg Updater to update the work orders, engineering masters, and quotes where the engineering master is used as a leg. Or, if you update a leg on an engineering master, work order, or quote, you can use the Leg Updater to update the original engineering master.

You can update any leg on any type of master, provided one of the following conditions does not exist:

- Quote masters linked to quotes that have been printed
- Any master with an active ECN, unless the user is on the ECN implementation team
- Any work order with a status of Closed or Canceled
- Any work order with transactions against any part of the leg
- Any master where the Allow Update from Master check box is not selected on the Engineering tab

You can view information about when legs have been updated on the Engineering tab of the Leg card. You can view information about when masters have been updated by legs on the Engineering tab of the Header card.

## Scheduling a set of work orders

In the Manufacturing Window and the Concurrent Scheduler, you can choose to schedule a subset of work orders. In the Schedule Work Orders dialog box, select the orders you want to schedule. You can schedule the work orders by Order Want Date, Priority/Want Date, Priority/Create Date, or by the order they are listed in the table.

## Other Manufacturing-related Improvements

- In the Manufacturing Window, the system displays the stock unit of measure on the Header card.
- In Purchase Order Entry and the Purchase Management Window, you can browse for purchase orders by Vendor Part ID.
- In Customer Inquiry, you can use the right-click menu to access Customer Maintenance. You can also use the right-click menu to access order entry. The system opens either Customer Order Entry or the Order Management Window depending on your settings in Preference Maintenance.
- In Vendor Inquiry, you can use the right-click menu to access Vendor Maintenance. You can also use the right-click menu to access purchase entry. The system opens either Purchase Order Entry or the Purchase Management Window depending on your settings in Preference Maintenance.
- In Part Maintenance, you can browse for the Product Code you would like to use.
- Customizable user-defined fields have been added to the Packlist reports.

# Project Enhancements

## Creating part locations on-the-fly

You can create a new location in a warehouse directly from the Assign Parts to Warehouse dialog box in the Project Window. Specify a new location in the Location ID field. When you click Save, the system asks if you want to add the new location to the warehouse. Click Yes to add the new location.

You can use this feature only if you have cleared the Not Allowed option in the Part Location on the Fly check box in Application Global Maintenance.

## Viewing project information in the Scheduling Window

In the Scheduling Window, project-related tasks are color coded to differentiate them from work orders. In addition, you can use the filtering options available in the Info menu to view only those tasks and work orders related to your projects. You can use this feature to identify which projects are on time and which are behind schedule.

When you place the cursor over a project task, the system displays the tooltip window. The tooltip window shows basic information for the task and displays the associated WBS code. If a work order is attached to a project task, the system displays the linked project task.

## Linking quotes to projects

You can specify project information in the Estimating Window to link a quote to a project. On the new Project tab in the header, you can specify Project Info, Project Type, the default WBS Code, and Project Warehouse information. In the line item table, you can specify a WBS Code, Project Reference Sequence Number, and Project Reference Sub ID.

You can begin the project creation process in the Estimating Window. If you specify a Project Info ID that does not exist, the system asks if you want to create the project. If you click Yes, the system launches the Project Maintenance window, where you can begin specifying project details.

After you link a project to a quote, you can view the links in the Project Status dialog box available in the Project Summary Window and the Project Window.

# Efficiency Enhancements

## Recently Used Records List

You can add a list of the most recently used records to the File menu of the following applications:

- Customer Maintenance
- Sales Order Entry
- Sales Order Management Window
- Purchase Order Entry
- Purchase Order Management Window
- Part Maintenance
- Vendor Maintenance

You specify the number of files to list in Application Global Maintenance. You can list up to 9 records.

## Life Cycle Document Viewer

Several processes go into a typical sales transaction or purchasing transaction. For example, a sale may begin with a quote you provide a potential customer. When the customer accepts the quote, the quote becomes the basis for a customer order. You create a work order, then the order ships. You create an accounts payable invoice, then the customer remits payment. Use the Document Lifecycle feature to track your sales and purchasing processes from beginning to end.

The Lifecycle Document Viewer shows you documents linked to the sales or purchasing document that you are currently viewing. You can double-click a document ID to view the entire linked document. For example, if you are viewing a purchase order, you can use the Lifecycle Document Viewer to see the purchase receipts, purchase requisitions, A/P invoices, and A/P payments associated with the purchase order.

You can access the Lifecycle Document Viewer in the following Purchasing modules:

- Purchase Requisition Entry
- Purchase Order Entry
- Purchasing Window
- Purchase Receipt Entry
- AP Invoices

- AP Payment Entry

When you access the Lifecycle Document viewer from any of the modules listed above, the system displays any other related purchasing documents of the types listed above.

You can access the Lifecycle Document Viewer in the following Sales modules:

- Estimating Window
- Customer Order Entry
- Order Management Window
- Work Order portion of the Manufacturing Window
- Return Material Authorization
- Shipment Entry
- AR Invoices
- Cash Application

When you access the Lifecycle Document Viewer from any of the modules listed above, the system displays any other related sales documents of the types listed above.

## Enterprise-wide Search

You can use the VISUAL search bar to search much of your database for any alphanumeric text. The system returns a list of all records that contain your search terms. In some cases, you can then double-click an item in the list to open the record.

You can perform a basic search or an advanced search using the VISUAL search bar. In a basic search, you enter your search term in the Search box, then click the Search button or press enter. The system searches the database for your exact search term and for data similar to your search term.

In an advanced search, you can limit your search to certain database columns. For example, if you limit your search to `cust_order_id`, the system searches all `cust_order_id` columns in the database. Several tables contain the `cust_order_id` column, including receivable (which corresponds to the Accounts Receivable Invoice window), shipper (Shipment Entry window), and many others.

Please note that the system does not search the entire database in either the basic or advanced search. The database columns identified in the Advanced Search dialog box are the only columns the system considers in a basic or advanced search.

After you perform a search, the system lists records based on your parameters in the Search Results table. You can export your results to Microsoft Excel, or you can print a Search Results report.

## Interface enhancements in the Scheduling Window

Several changes in the Scheduling Window make it easier for you to analyze the information in the window. The new features include:

**New Operation Bar Color Coding** – The color coding of the operations in the scheduling window has been updated. At a glance, you can differentiate between standard work orders and tasks, on-time operations and late operations, frozen operations, and operations in the determinant path.

**New Filtering and Display Options** – The Info menu has been updated to offer expanded options to filter the information in the Scheduling Window. You can filter the information in the window to view only work orders or only projects. You can also choose to view only one work order in the window. When you select an operation, the system highlights the resource associated with the operation and highlights the dates that the operation is scheduled to occur.

**Zooming and Scrolling** – You can use the mouse wheel to zoom in and out. Hold the CTRL key down, then use the mouse wheel to adjust the zoom level. When you exit the Scheduling Window, the system remembers the last zoom level you used and displays the window at that zoom level the next time you access the Scheduling Window. The system retains the zoom level no matter what method you use to set the zoom level (mouse wheel, Zoom In and Zoom Out buttons, etc.)

You can also use the mouse to scroll the window. Use the mouse wheel by itself to scroll the window up and down. Hold down the Shift key, then use the mouse wheel to scroll the window left to right. You can also drag the window to scroll in any direction. Place the cursor over a blank section of the Scheduling Window. The cursor changes to a hand. Click and hold the mouse button. The cursor changes to indicated that it has “grabbed” the window. While holding down the mouse button, move the mouse to scroll in any direction.

**Tooltip Information** – When you place the cursor over an operation or project task, the system displays the tooltip window. The tooltip window shows basic information for the operation or project task, including the part, work order operation number, the start and finish date, the want date, the material requirements, availability, and whether the operation is determinant. For project tasks, the system also displays the associated WBS code. If a work order is attached to a project task, the system displays the linked project task.

## At-a-glance Enhancements

You can use the “at-a-glance” enhancements to quickly and easily process information about the window you are viewing. These enhancements include color-coding and new icons that change as conditions in your database change.

### Color Coding in the Material Planning Window

You can color-code columns in the Material Planning Window to more easily locate data related to Demand, Supply, Projected Quantity, and Exceptions. The system displays color coding on the Standard View of the Material Planning Window only.

### Shipping status indicator

In Customer Order Entry and Shipping Entry, you can see at-a-glance if you have enough inventory to fill and ship the order. The system displays text and an icon to show if the part is in stock, expected to be in stock, or not in stock. You can choose how the system calculates the inventory level. The Simple calculation method examines current inventory, planned orders, and current

demand. The Advanced calculation method uses a material netting style approach to determine inventory levels.

The shipping status icon has also been added to the Customer Shipping/Delivery Report.

## **Evaluating Customer Credit**

You can set up credit thresholds and settlement thresholds for your customers. Credit thresholds are expressed as the percentage of the credit line that the customer has consumed. You can set up percentages for Acceptable, Warning, and Unacceptable levels. Settlement thresholds are expressed as the percentage of invoices that the customer has paid on time. You can set up percentages for Acceptable, Warning, and Unacceptable levels. The system displays the customer's current credit balance and the age of the oldest outstanding invoice to help you determine credit and settlement thresholds.

You can then evaluate a customer's credit-worthiness directly in Customer Order Entry. The system uses information you defined in the customer's record in Customer Maintenance to help you identify potential credit risks. Use the Credit tab to view basic information about the customer's credit performance, such as credit status, credit limit, credit balance, etc. Use the toolbar buttons to view the customer's credit and settlement ratings. The system changes the icons on the buttons to indicate the credit threshold level and the settlement threshold level. Click the buttons to view the transactions that make up the ratings.

In addition, you can determine how the system should define the oldest open invoice for each customer. You can choose to examine invoice dates or due dates to determine the oldest open invoice.

## **Task notification in the Windows Task Tray**

You can set up VISUAL to display an icon in the Windows Task Tray any time a user has an open task. The user can double-click the icon to open Task Maintenance.

## **Document Reference Indicator**

The Documents button on the toolbar indicates whether documents are attached to the record. To view an attached document, click the Documents button and double-click the document to view it.

## **Purchase Contracts**

You can create a formal contract ID to associate with quotes your vendors provide. If you use the contract ID in Purchase Order Entry and Purchase Requisition Entry, the system inserts the correct pricing based on your contract with the vendor.

You can create contract IDs in Vendor Request for Quote Entry. When you create a vendor RFQ, specify a contract ID in the new Supplier Contract ID field. After you approve the quote, the system creates the contract.

You can also create contract IDs in the Adding Vendor Quotes dialog box in Part Maintenance and the Vendor Services Supplied dialog box in Outside Service Maintenance.

You can view all contracts in your database in the Purchase Contract dialog box. This dialog box is available in the Edit menu in Vendor RFQ Entry, or in the Maintain Menu in Part Maintenance and Outside Service Maintenance.

From this dialog box, you can print a Purchase Contracts List to view the contracts you have with vendors. You can also print a Purchaser Contract Usage Report to view the purchase orders that reference vendor contracts.

## Sorting information in tables

You can sort information in several tables. In the tables, the system inserts a triangle in the column header. Double-click the triangle in a column to sort the table by that column. You can double-click the triangle again to switch between ascending and descending order. You can sort information in the following tables:

Issue by Exception table -- You can sort the table by Req Date, Part ID, Trc, or Qty Due. Access the Issue by Exception table from the Inventory Transaction window.

Shipment table – You can sort the table by Packlist ID, Shipped Date, Invoice ID, or Invoiced Date. Access the Shipment table from Customer Inquiry.

Purchase Receipt Entry Lines table – You can sort the table by line number, part ID, part description, and vendor part ID.

## Document References

You can add documents by specifying a URL address. You can use URLs that begin with `http://`, `https://`, or `file://`. If you share documents using Microsoft Sharepoint, you can also use a URL that begins with `file://`.

In addition, the case-sensitivity of document IDs has been eased. You can enter a document ID in all capital letters or all lower-case letters. For example, if your document ID was `document.doc`, you could enter `DOCUMENT.DOC`.

## Closing Purchase Order Lines Short

You can use the new Close Ln Short check box to close lines on a purchase order before the entire quantity you ordered has been received. When you select the check box in Purchase Order Entry, the system selects the Ln Close Short check box for the corresponding line in Purchase Receipt Entry. Similarly, if you close a line short in Purchase Receipt Entry, the system selects the Ln Close Short check box in the corresponding purchase order entry line.

## Scheduled Finish Date

If you linked a customer order to a work order, the system inserts the date that the work order is due to be complete in the new Sched Finish Date field. If the customer order is linked to an existing work order, the system inserts the scheduled finish date from the work order. If you are creating a new

work order for the customer order, the system inserts a date after you select File, Check Schedule Availability.

## Currency Change Notification

When you first open Purchase Order Entry, if you select a Vendor ID that uses a different currency from your system currency, the system displays a message warning you that the currency has been changed and that monetary fields will retain their current (unconverted) values.

## Accessing Purchase Receipt Entry from Purchase Order Entry

You can access Purchase Receipt Entry directly from the Purchase Order Entry window. Right-click in an empty area of the Purchase Order Entry header and select Receiving from the menu. If you selected a purchase order in the Purchase Order Entry window, the system inserts the details of the purchase order into the Receiving window. If the Purchase Order Entry window is blank, then the Receiving window is also blank.

You can also access Purchase Receipt Entry from the Purchase Order Entry tool in the Purchase Management Window.

## Accessing Shipping Entry from Customer Order Entry

You can access Shipping Entry directly from the Customer Order Entry window. Right-click in an empty area of the Customer Order Entry header and select Shipping from the menu. If you selected a customer order in the Customer Order Entry window, the system inserts the details of the customer order into the Shipping Entry window. If the Customer Order Entry window is blank, then the Shipping Entry window is also blank.

You can also access Shipping Entry from the Customer Order Entry tool in the Order Management Window.

## Costs and Scheduling Availability in Quick Quote

You can view summary and detailed cost information for a currently selected quick quote. You can view summary information for estimated costs, actual costs, variance, and projected costs. For each of these types, you can view detailed information.

You can also check scheduling availability from the quick quote dialog box. Use the Check Availability command to test schedule the work to be performed in the quote against one of the current schedules to see how it would fit in to your current production plans.

## Next Line Statement in Workflow

In Workflow, Use the Next Line option if you want to consider one database column in relation to a second database column to determine the records you want to select. For example, if you want to create a statement that selects parts with a unit price (`part.unit_price`) that is greater than or equal to

20% more than the wholesale unit cost (part.whsale\_unit\_cost), you would enter the following two lines:

Table	Column	Operator	<Operator> Value	Comparison	<Comparison> Value	Logical
+PART	UNIT_PRICE			>=		Next line
+PART	WHSALE_UNIT_COST	*	1.2			

You can combine more than one Next Line statement. For example, if you wanted to create a statement that selects parts with a unit price greater than or equal to 20% of the wholesale unit cost but less than or equal to 50% of the wholesale unit cost, you would enter the following two lines:

Table	Column	Operator	<Operator> Value	Comparison	<Comparison> Value	Logical
+PART	UNIT_PRICE			>=		Next line
+PART	WHSALE_UNIT_COST	*	1.2			And
+PART	UNIT_PRICE			<=		Next line
+PART	WHSALE_UNIT_COST	*	1.5			

You can also create Next Line statements that search for information across two different database tables. For example, if you wanted to search for all part IDs that have been used in customer order lines, you would enter the following:

Table	Column	Operator	<Operator> Value	Comparison	<Comparison> Value	Logical
+PART	ID			in		Next line
+CUST_ORDER_LINE	PART_ID					

## Other Efficiency Enhancements

Other enhancements include:

- You can add Vendor Name to the purchase requisition browse table.
- You can export information from more browse tables and window tables to Excel. In addition, Print, Send to Excel, and Import from Excel toolbar buttons have been added to more Advanced Browse tables.
- You can create macros to use in Vendor RFQ Entry.
- You can specify descriptions for SIC codes, Commodity codes, AIC codes, Territory codes, FOB Point codes, and Ship Via codes.
- You can print labels from Inter Branch Transfer Shipping Entry.
- You can view the work order panel and the operation panel in the Scheduling Window.
- You can choose from all export options – print, file, view, and email, when generating Service Dispatch Packlists.
- You can only attach graphics to records using the Picture function available in many VISUAL executables. We recommend using Document Reference to add other types of files to records.
- The system can import Microsoft Excel files in the .xlsx format.

# Accounting Processes Improvements

## Terms Maintenance

Use the new Terms Maintenance dialog box to define the payment terms you use when invoicing customers and when vendors invoice you. The system assigns an ID to the payment term you define. Users can then choose an ID to specify terms in windows such as Customer Maintenance, Customer Order Entry, the Estimating Window, Receivable Invoice Entry, Vendor Maintenance, Purchase Order Entry, and Payable Invoice Entry.

If you are upgrading from a previous version of VISUAL, the system examines the terms currently in use in your database and creates terms IDs for them.

If you use Infor ERP VISUAL Financials Global Edition, this feature is not available to you. Maintain terms in Global Financials instead.

## XML Payment Export Formats

You can create an AP export file format in XML. Use the Payment/XML format to export payments to Single Euro Payment Area (SEPA)-compliant file transfer systems. You can create an export format to use with release version 4.0 for SEPA Credit Transfers. You can build simple XML formats, or build more complex formats using the built-in macros. In addition, you can use a variety of expressions to format the data.

## Exporting document postings to Excel

You can export the information in the Document Postings dialog box to Microsoft Excel. The system exports all information except for the totals. You can access the Document Postings dialog box from the Accounting Window. Select Info, Posted Transactions. Click either the Batch Detail button or the Posting Detail button. Then, click the Document Postings button.

## Allowing Duplicate A/P Checks

In Payment Entry, you have the option of manually entering individual accounts payable checks and prompting the system to generate multiple accounts payable checks. You can use the new Allow Duplicate A/P Checks check box in Financials Application Global if you do not want the system to duplicate a check number you have specified in a manual payment. Select this check box if you want

to allow the system to duplicate a check number you have specified in a manual payment. Clear the check box to prevent the system from issuing a duplicate check number.

## Sales tax by Part ID

Use the Sales Tax Groups by Part ID dialog box to define the sales tax group you want to use for various combinations of Part ID, Customer ID, and Customer Address ID. For example, you can assign a sales tax group for PART A when it is sold to CUSTOMER 1 and a different sales tax group for PART A when it is sold to CUSTOMER 2. Furthermore, you can assign sales tax groups for the part based on the customer shipping address. For example, you can assign a sales tax group for PART A when it is shipped to CUSTOMER 1's MAINE location, and a different sales tax group for PART A when it is shipped to CUSTOMER 1's VIRGINIA location.

## Actual and rounded purchase order receipt unit price information

In Accounts Payable Invoice Entry, the system displays a Rounded P/O Recv Unit Price and an Actual P/O Recv Unit Price in the purchase order lines table. The Rounded P/O Recv Unit Price displays the purchase order receipt unit price, rounded based on currency. The Actual P/O Recv Unit Price displays the purchase order receipt unit price taken directly from the associated purchase order line. These two fields replace the Unit Price field.

## Invoice totals in accounts payable and accounts receivable

As you add or delete line items from the Invoice Entry line item table, the system calculates the totals. For accounts payable invoices, the system calculates the total amount, fixed charge, VAT, Freight (for lines tagged as freight), Duty, and Grand Total for all lines in the table. For accounts receivable invoices, the system calculates the total amount, tax, freight, and Grand Total for all lines in the table.

## Partial Shipments and Pre-invoicing

If you pre-invoice your customers for orders in advance of them receiving their order, or if they are progress billed, you can choose how to handle the excess pre-invoiced amounts when creating the manufacturing shipper invoice for the partial shipment.

You can choose one of the following options:

**Create memo with excess balance** – Select this option if you would like to create a memo for any excess amount from pre-invoices or progress billings when customer orders are partially shipped. For example, if the customer has been pre-invoiced for \$300 for a certain quantity of a part, and you have shipped \$200 worth, then the system generates a memo worth \$100 for the customer's account.

**Retain excess balance for future shipments** – Select this option if you would like to retain the excess amount that a customer has been pre-invoiced or has been progress billed. The system behaves differently depending on if you pre-invoice the customer or progress bill the customer.

If you progress bill the customer, the system considers the amount to apply on a line-by-line basis. For example, if the customer has a progress billing invoice for \$300 for a certain quantity of a part on line 1 of the customer order, and you have shipped \$200 worth, then the system retains the \$100 to apply to a future shipment of the same part on line 1 of the customer order.

If you create the pre-invoice in Accounts Receivable Invoice Entry, then the grand total of the customer order is considered when the system determines the amount to refund or apply to a future shipment. The individual lines are not considered.

If you close the customer order or a line short prior to consuming all of a pre-invoice amount, the user must manually generate a memo to offset the remaining balance of the pre-invoice.

Specify the Partial Shipments with pre-invoicing setting on the Shipment Trk tab in Application Global Maintenance.

## Line types in Accounts Receivable Invoice Entry

When you enter an accounts receivable invoice manually, you have the option of designating the type of charge for each line. In the Line Type field, you can specify:

- Invoice if the charge on the line is for a part, service, or miscellaneous item
- Tax if the charge on the line is for taxes, and
- Freight if the charge on the line is for freight.

## Suppressing Customer Statements

If you do not want print customer statements for a particular customer, you can select the Suppress Printing of Customer Statement check box in Customer Maintenance. If you select this option, the customer will not be included when you run Customer Statements in Receivables Invoice Entry.

## Viewing manual payments in Payables Inquiry

In Payables Inquiry, you can view payments made manually from your G/L accounts. To view manual payments, select a vendor, then select View, Manual G/L Payments by Vendor.

## Other Accounting Process Improvements

Other accounting process improvements include:

- You can run the PO Accrual Report by entity or a range of entities.
- In General Journal Entry, the Batch Information dialog box no longer truncates the batch description.
- In the Print List of Unprinted Invoices report in Invoice Forms, the system prints the number of unprinted invoice and the total amount of the unprinted invoices in system currency at the end of the report.
- In Invoice Forms, you can specify an alphanumeric prefix to add to preprinted invoice forms.

- In Currency Maintenance, the system displays the Euro symbol. You can also select European Union to specify any country that is a member of the EU.
- From Payables Inquiry, you can use the right-click menu to drill back to Invoice Entry or Payment Entry.
- From Receivables Inquiry, you can use the right-click menu to drill back to Invoice Entry or Cash Application.
- To support CRM, the length of the Honorific field is now 15 characters long.

# Administrative Improvements

## Preferences Maintenance

Use Preferences Maintenance to control display sizes, default values, default views, and other aspects of VISUAL applications.

If you are upgrading from a previous version of VISUAL, Preference Maintenance replaces most of the settings in the VISUAL.ini file and in individual application .ini files. Certain settings that VISUAL needs to launch, such as log in information, remain in the VISUAL.ini file. You should not edit the settings that remain in the VISUAL.ini file.

Many of the Preference Maintenance preferences can also be set in the individual applications.

All users can use Preference Maintenance to load any existing values from the VISUAL.ini file, set their own preferences, and print a list of their preferences. The system administrator user can set preferences for other users on an individual basis, create global settings, set up preference profiles and apply the profile to users, and print a list of global and individual user preferences.

After you change preferences, you must log out of VISUAL and log back in for the changes to take effect.

## Security Maintenance

Many of the Security administration functions have been combined in one window. Use the new Security Maintenance window to set permissions for individual users, create user groups, copy permissions from one user to another, and copy permissions from one group to another group.

You can also use the Security Maintenance window to create security profiles. You can use security profiles as templates to streamline the process for setting permissions.

You can use profiles for users in two ways. You can assign the profile to the user, or you can copy the profile settings to a user. When you copy a profile to a user, the user inherits all of the profile settings. The settings are transferred to the user's security record.

When you assign a profile, the user also inherits the profile settings, but the settings are not copied to the user's security record. Therefore, when you view a user's security record, the system does not display the security settings that the user inherited from the profile. If you change a profile after you assign it to a user, the user inherits any of the changes you make.

You can assign multiple profiles to the same user. If you assign multiple profiles to the same user, the system applies security settings cumulatively. For example, say you assigned Profile 1 and

Profile 2 to a user. Profile 1 denies access to the Inventory menu but grants access to all other menus; Profile 2 denies access to the Engineering menu but grants access to all other menus. The user would not have access to either the Inventory menu or the Engineering menu.

You can also create group profiles. You can copy group profile information to individual groups.

You can create a profile that contains both user security information and group information. When you apply the profile to a user or group, however, only the pertinent information will be applied. For example, if you create a profile with both user and group information, then apply the profile to a user ID, only the Status, ECN Status, Menu Security, and Program Security information will be applied to the user.

The process for setting up profiles is similar to the processes for setting up individual users and groups.

The Security Report has been updated to include profile information.

You can also choose to grant users system administration privileges. Select the System Administrator check box to grant users access to the same applications to which the SYSADM user has access.

The number of areas where you can apply security settings has been expanded. The new areas are:

**Manufacturing Window** – You can deny access to engineering masters, quote masters, and work orders. You can deny access to one master type or any combination of master type.

**Costs** – You can deny users access to costs. If you deny access, users cannot access any cost information in the Manufacturing Window, including Exploded Estimated Costs dialog box, Costs tabs on cards, and the Costs dialog box in Operation and Material cards. They will also not have access to costs in the Estimating Window.

**Close/Reopen Period** – You can prevent users from closing and reopening periods in the Accounting Window.

**Accounting Window** – You can grant or deny users permission to print the Balance Sheet, Income Statement, and Trial Balance reports. You can also grant or deny users permission to maintain subordinate accounts. In addition, you can restrict users to read-only access to the description, summary account, revalue, subordinates, groups, allocations, account subtype, budget, and currency, and active fields.

**Batch Deletion** – You can grant or deny users permission to delete batches in General Journal Entry.

**Terms** – You can grant or deny users permission to create new terms IDs.

**Vendor Maintenance and Customer Maintenance** – You can grant or deny access to any of the tabs in the windows. In addition, you can restrict users to read-only access to any of the fields in the header on a field-by-field basis.

**Part Maintenance** – You can restrict users to read-only access to any of the fields in the header on a field-by-field basis.

## Displaying Licensed Components

Use the Display License to view the components that you are currently licensed to use. This feature is available to system administrators only.

This option is available on the Admin menu.

The system lists all available VISUAL components and selects the check box next to the components for which you have entered a license number. Some of the components, such as VISUAL Quality and VISUAL Global Financials, have their own license number. Other components, such as Defense and Project, are enabled based on your Infor ERP VISUAL Enterprise license.

## Named User License

VISUAL can now be licensed on a named user basis. A named user license governs the number of users you can have in your VISUAL database. For example, if you have a Named User license for 100 users, then you can have up to 100 user IDs in your VISUAL database.

## Customizable User-Defined Fields

You can add two new types of user-defined field: combo box and URL.

Use combo boxes to prompt users to select from a list of pre-defined choices. To create a combo box user-defined field, specify the String List data type. You can set up three types of lists: database, static, and dynamic. In a database list, the system populates the drop-down list with values from a database table and column that you specify. In a static list, users select from options you define. In a dynamic list, the system populates the drop-down list with values that have previously been entered for the field.

Use the URL data type to prompt users to enter a URL. You can specify a prefix, such as `http://`, that the system attaches to the information the user enters.

You can add information from your customized user-defined fields to the Customer Orders report in Customer Order Entry, the Pack List report in Shipping Entry, and invoices in Invoice Generation.

You can use customizable user-defined fields in Return Material Authorization Maintenance.

## Auditing Report Times

You can track the duration of reports run from the executables you choose to audit. Select the Audit Report Times check box. The system records the start time of the report and the end time of the report. To view the information in the audit results table, select the Report Audit check box in the Filters group box. The system inserts the start time of the report in the Old Value column and the end time of the report in the New Value column.

## Unit of Measure Maintenance

If you create your own ID in unit of measure maintenance (that is, an ID that is not an ISO code), the system selects the User Defined check box to indicate that the ID is not the ISO standard.

## Excluding Buyers from purchasing from vendors

If you would like to prohibit certain buyers from entering purchase orders for certain vendors, use the Excluded Buyers dialog box in Vendor Maintenance. For example, if you would like to prevent the buyer JED from entering a purchase order buying goods from the vendor BOSSEL, you use the Excluded Buyers dialog box to set up the limitation.

# Performance Improvements

System performance has been improved in the following areas:

- Recalculate Inventory Balance
- Purchase Management Window

# Documentation improvements

The Infor ERP VISUAL Enterprise documentation set has been reorganized into smaller, more function-specific guides. The new guides are:

*Infor ERP VISUAL Enterprise Concepts and Common Features* – This guide describes the basics of VISUAL, including how to add records to the database, how to navigate in the applications, and how to set up personal preferences.

*Infor ERP VISUAL Enterprise System Administrator's Guide* – This guide describes the functions that only a user with system administrator privileges can perform.

*Infor ERP VISUAL Enterprise System-wide Features* – This guide describes functions that apply to or are used in multiple areas of VISUAL. The chapters are Application Global Maintenance, Manufacturing Costing, Document Maintenance, Message Maintenance, Employee Maintenance, Audit Maintenance, Workflow, Allocation Utilities, and Data Interchange.

The following guides share a basic organization. The guides describe basic maintenance functions first, followed by transactions. The final chapters of each guide discuss reporting and other analysis functions.

*Infor ERP VISUAL Enterprise Sales User's Guide* – This guide describes functions common to the sales cycle. The chapters are Customer Maintenance, Sales Tax Group Maintenance, Estimating Window, Customer Order Entry, Order Management Window, Shipping Entry, Return Material Authorization, Invoice Forms, Progress Billing Entry, Price Book, Customer Inquiry, Sales Reports, and Product Configurator Interface Maintenance.

*Infor ERP VISUAL Enterprise Purchasing User's Guide* – This guide describes functions common to the purchasing cycle. The chapters are Vendor Maintenance, Outside Services, Vendor Request for Quote Entry, Purchase Requisition Entry, Purchase Order Entry, Purchase Management Window, Purchase Receipt Entry, Receiving Inspection, Outside Service Receipt Entry, Outside Service Dispatch Entry, Vendor Inquiry, and Purchasing Reports.

*Infor ERP VISUAL Enterprise Inventory User's Guide* – This guide describes functions common to inventory management. The chapters are Unit of Measure Maintenance, Part Maintenance, Warehouse Maintenance, Part Traceability, Dimensional Inventory, Inventory Transaction Entry, Inter Branch Transfer, Material Planning Window, Physical Inventory Count, Consigned Inventory, Inventory Reports, and Cost Simulation.

*Infor ERP VISUAL Enterprise Manufacturing User's Guide* – This guide describes functions common to manufacturing products. The chapter are Shop Resource Maintenance, Equipment Maintenance, Manufacturing Window, Coproducts, Concurrent Scheduler and the Scheduling Window, Labor Ticket Entry, Work Order Travellers, Barcode Labor Transactions, and Engineering Change Notices,

Planned Maintenance Manager, Unplanned Maintenance, Throughput Window, Scheduling Reports, Engineering and Manufacturing Reports, and Data Import Utility.

# Double Byte Conversion

The information in this section is intended for highly technical users only.

Infor ERP VISUAL Enterprise 7.0.0 was developed using Unify Team Developer 5.2. This version of team developer uses double bytes for its internal strings. The VISUAL database, however, uses single bytes for internal strings. The system converts the double byte strings to single byte strings to store the information in the VISUAL database.

If you use an Oracle database, the system represents characters with Unicode Utf-16. The system converts the double byte information as follows:

Varchar strings – The Oracle driver converts varchar strings to single byte information when the string is written to the database.

Blobs – For binary large object (blob) data, the system explicitly reads from the database using the `SalStrToWideChar` function and writes to the database using the `SalStrToMultiByte` function.

If you use a Sqlserver database, the system uses the `sqlwntm.dll` as a wrapper that intercepts calls to the database. `Sqlwntm.dll` uses odbc api to “talk” to the database. The system converts double byte information as follows:

Varchar strings – The system passes the double byte Unicode strings on to the odbc api, which then writes and reads it from the database. The odbc api is passed a parameter that tells it that the strings are double byte. The odbc api does the appropriate conversion from the double byte string to the single byte multibyte string of the database columns.

Blobs – For binary large object (blob) data, the system explicitly reads from the database using the `SalStrToWideChar` function and writes to the database using the `SalStrToMultiByte` function.

# Known Issues

## Display Issues

- If you minimize windows for a long period of time and then restore the window, the menu, the toolbar, or both is occasionally erased. Move the window to restore the menu and toolbar.
- When windows are maximized and you open and close a dialog, the window title may be redrawn using the background color from the Windows theme. This has no impact on functionality.
- Headings in a table are occasionally bottom-aligned. Refreshing the window corrects the issue.

## Issues in Scheduling Window

- In Animation mode, screen objects may not be placed in the correct location.
- In Animation and auditing mode, the screen flickers, most notably when using the Next Work Order and Previous Work Order buttons.
- If you are viewing the information panels, the system does not always respond to actions performed with the mouse wheel. Clicking the Window header bar may resolve this issue.

## Issue with Window Editor

When windows are modified using the Window Editor option on the Admin menu, text that contains the NEWLINE character may not wrap to the next line when the NEWLINE character is processed.

## Customizable User-defined Fields in Reports

The order that you specify for customizable user-defined fields in a QRP is the order they will be displayed in the QRP, regardless of which CUDF you defined first or how you reordered them on tabs. The QRP must be manually changed by the user if they reorder the UDF's on a tab.

## Issue with Using Send in Microsoft Excel

Using the Send option in Excel causes an issue with MaX Compression. MaX Compression reports the attachment table as empty, which results in an error message indicating that the operation cannot be performed because the object is deleted.

The error also occurs when users use a VBA (macro) in Excel to send attachments via Outlook from the attachment itself.

To resolve the issue:

- 1 Open regedit on the client machine.
- 2 Navigate to "HKEY\_CURRENT\_USER\Software\C2C Systems\MaX Compression\compextn\Settings".
- 3 Create a DWORD called "DeleteRogueAttachments".
- 4 Set the Value to 2 which makes the behavior Never Delete.

OR

Apply a patch to MaX Compression.