Infor VISUAL
Functional Overview
Version 9

Table of Contents

Introduction 4
Standard Features 5
VISUAL Solution Footprint 5
Optional Features 7
Sales 8
Opportunity to Cash 8
Manufacturing Window 9
Quoting and Estimating 10
Sales Order Entry to Invoicing 11
Order Management 13
Product Configuration 14
Price Book 15
Return Material Authorization (RMA) 16
Electronic Data Interchange 17
Customer Relationship Management 18
VISUAL Contact Center 18
VISUAL CRM Enterprise 20
Infor CRM 22
Infor Back Office Connect 23
Manufacturing & Engineering 24
Manufacturing Window 24
Production Control 26
Engineering Change Notice 27
VISUAL CADLink 28
Plant & Equipment Maintenance 29
Infor Enterprise Asset Management (EAM) 30
Capacity Management 32
Concurrent Scheduler 32
Common Sense Throughput for CEOs 34
Easy Lean 36
Mobile Scheduling Dispatch 37
VISUAL Time & Attendance 38
Material & Labor Barcode Transaction System (BTS) 39
Material Planning 41
Master Scheduling & MRP 41
Advanced Material Planning 43
Supply Chain & Inventory Management 45
Request for Quote to Payment 45
Purchase Management 46
Inventory Management 48
Interbranch Transfers 49
Dimensional Inventory Tracking 50
Lot & Serial Traceability 51
VISUAL Project Management 52
VISUAL Project Core 52
VISUAL Project – Aerospace & Defense 53
Infor Quality Management 54
VISUAL Financials 57
Financial Management 57
General Ledger 57
Accounts Payable 59
Accounts Receivable 60
Cash Management Window 61

Cost Accounting 62
VISUAL Global Financials 63
Multi-entity and Multi-site 64
Performance Management 66
VISUAL Dashboards 66
VISUAL Business Intelligence 67
VISUAL Lead-time Performance Management 68
Core Solution Reporting 69
Solution Framework 70
Workflow 70
Document Lifecycle Notifications 71
VISUAL Messages 72
Activities 73
VISUAL Query Tool & Data Source Lookup 74
Configuration & Modifications 75
Infor ION 77

Introduction

Order-driven manufacturing is complex enough—you don't want to guess every time you quote a price on a job or promise a delivery date. You need to see, at a glance, the impact of every order, constraint, and bottleneck in your organization so that you can have confidence in your delivery promises and revenue projections. With Infor™ VISUAL, you can eliminate guesswork, by being able to visualize the effects on production and revenue projections along the way. When you have a tool that lets you stop guessing, you can start delivering consistently profitable results.

Infor VISUAL gives manufacturers the ability to bring order to your orders. Your business doesn't ask for chaos, but you get it every day. Every time the phone rings, customers are making changes, machines are breaking down or vendors are late. Any of these challenges makes managing your manufacturing more difficult. Doing the best you can isn't good enough anymore. What if you could react easily to any change or request?

When you visually see the effects of changes as they happen, everyone in your company will instantly know what to do next, and you'll accomplish everything faster. Infor VISUAL gives you visibility to your progress now. No longer do you need to search through screens and reports. With Infor VISUAL all decision making information is at your fingertips.

Winning teams can't afford to wait until after the game to adjust their strategy. You can't either. Basing tomorrow's strategy on financial statements from last week, last month, or last quarter is a formula for failure. Make adjustments while you're in the game by seeing the key statistics you need to run your business. Infor VISUAL helps you respond effectively to all surprises so you can achieve consistently great performance.

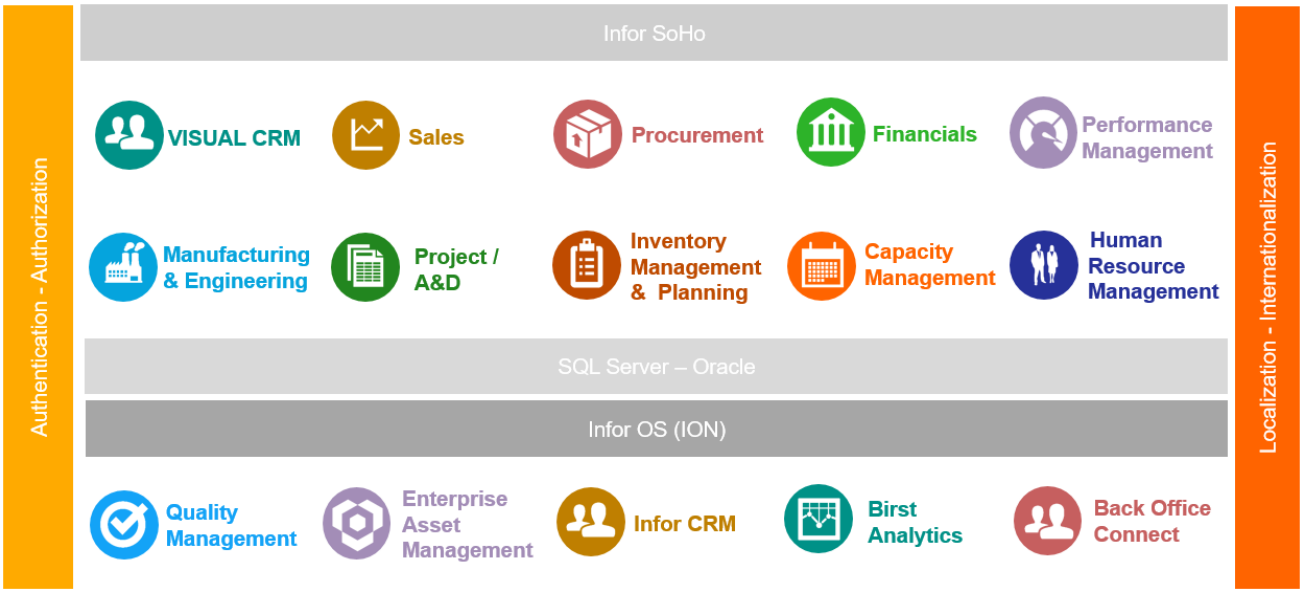
Infor VISUAL supports your manufacturing production strategies including engineer to-order, make-to-order, assemble-to-order, make-to-stock, job shop, and mixed mode manufacturing.

Regardless of your manufacturing method, Infor VISUAL helps you drive quality throughout your organization. You can use VISUAL to cultivate lasting customer loyalty by building a quality

assurance program that ensures superior results every day. You can make quality intrinsic to your process from design to delivery. Whether your customers require quality certification, they deserve a quality product, and you can drive quality with VISUAL. .

VISUAL's intuitive navigation, full-color graphic interface, point-and-click drill-down capabilities, and robust search options help you to make decisions and act on them immediately. High-level warning indicators with top to bottom drill-down functionality provide quick access to root causes. With VISUAL, you get easy access to the crucial information you need to perform your job.

VISUAL Solution Footprint



Standard Features

VISUAL CRM

- Contact Management
- MS Outlook integration
- Call tracking
- Prospect Management

Sales

- Quote to Cash
  - Prospect Management
  - Estimating & Quote Management
  - Sales Order Management
  - Shipping & labeling
  - Invoicing
  - Cash Receipts
- Capacity to Promise
- Material Availability
- Price book
- Delivery lines with delivery schedules
- Sales document lifecycle 360 view
- Demand Supply allocations
- Electronic Data Interchange
- Customer Consigned Inventory

Procurement

- Request for Quote
- Supplier pricing
- Requisitions
- Purchase Orders
- Receiving & Inspection
- Interbranch Transfers
- Outside service dispatching
- Supplier Consigned Inventory

Financials

- General Ledger
  - Multi-Entity
  - Multi-Currency
  - Consolidation
  - Allocations
  - Budgets
  - G/L Dimensions
  - Account Groups
- Accounts Receivable
- Accounts Payable

- Cash Management
- Cost Accounting
- Project Accounting
- Financial Reporting
- G/L Report Writing

Performance Management

- Dashboard Analytics
- User Defined Dashboard Analytics
- Supplier Performance
- Throughput Management
- Document Lifecycle
- Lead-time Performance
- Financial Reporting

Manufacturing & Engineering

- Engineering Master – combined multi-level BOM and routing
- Manufacturing Window
  - Graphical WO status
  - WO Cost Estimate, actuals, and projections
  - Purchase to job
  - Material availability
- Engineering Change Control

Inventory Management & Planning

- Item Management
- Warehouses & Locations
- U/M Conversion
- Inventory Costing – Actual, Average, Standard, FIFO, LIFO
- Material Requirements Planning (MRP)
- Master Scheduling
- Forecasting
- Material Planning Window – Supply Demand Netting
- Serial Number Control
- Lot Control
- Dimensional Inventory
- Physical Inventory

Capacity Management

- Resource Management
- Outside service management
- Concurrent Finite Scheduling
- Rate-based Scheduling
- Graphical Scheduling Window
- What-if drag & drop scheduling
- Mobile Production Dispatch
- Labor Reporting

Solution Framework

- Messages & Alerts
- Document Workflow
- Macro extension builder
- API Toolkit
- Drag & Drop Query generation
- Advanced Enterprise Search
- Document Activities with Alerts
- Lifecycle Notifications
- Graphical document lifecycle
- Context Sensitive Help
- Feature Video Library
- Interactive table/column data dictionary
- Report Designer
- Document Management

Optional Features

VISUAL Options

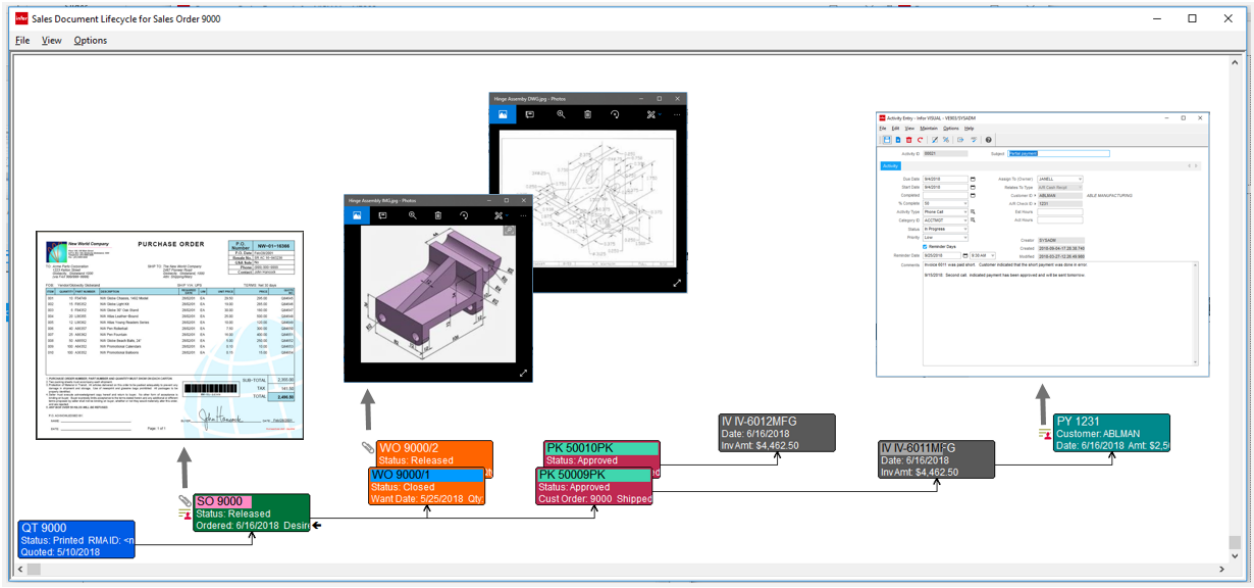
- Aerospace & Defense / Project Management
- EasyLean / Drum-buffer-rope Scheduling
- Plant & Equipment Maintenance
- Multi-Entity Multi-site
- Advanced Planning
- Global Financials
- Payroll and Human Resources
- Business Intelligence (Synoptix)
- Shop Floor Automation
  - Time & Attendance
  - Material – WO, adjustments, Transfers, shipping, receipts, Physical inventory
- VISUAL CRM Enterprise
  - Sales
  - Service
  - Help Desk
  - Marketing
- Infor Quality Management (IQM)
  - Suppliers, Customers, Employees
  - Preventative Maintenance
  - Calibration Maintenance
  - Advanced Product Quality Planning (APQP)
  - Production Part Approval Process (PPAP)
  - Inspection Plans
  - Document Management
  - Process Management
  - Data Collection
  - Non-Conformance
  - Corrective Action
  - Audit Management
  - Cost of Quality
  - SPC, Study, Reports

Infor Extensions

- Enterprise Asset Management (EAM)
- Infor CRM
- Back Office Connect (Salesforce)
- Birst
- ION
- Query & Analyze
- CADLink
  - AutoCAD
  - AutoCAD Electronics
  - Altium
  - CATIA
  - Creo
  - DxDesigner
  - Inventor
  - Nx
  - Solid Edge
  - SolidWork

Sales

Opportunity to Cash



From opportunity to cash, VISUAL's sales document lifecycle provides a full 360-degree status from anywhere in the sales process.

Infor VISUAL is fully integrated from the point of customer quote through cash receipt, providing complete drill-through functionality to all related documents of the sales lifecycle. Service representatives have a complete 360° graphical view of all documents related to the entire sales process along with the file attachments and activities associated with each document.

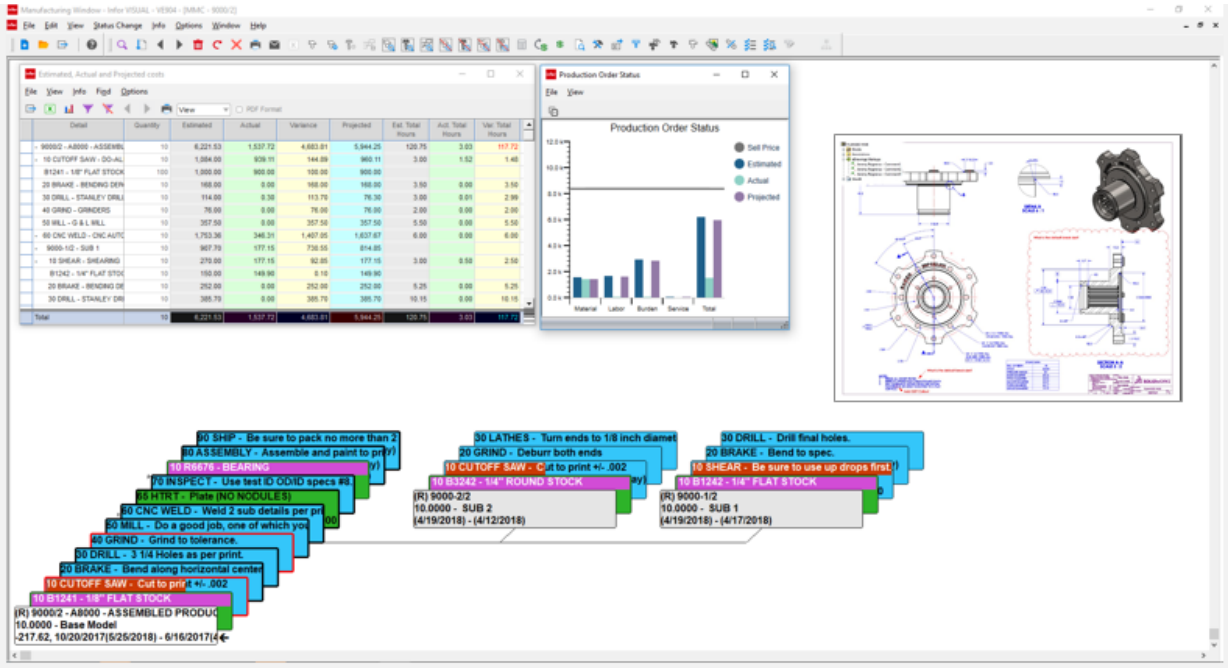
This innovative lifecycle puts order status and performance at your fingertips with the ability to drill down to any level of detail. For example, if a job is projected to exceed estimates, reducing your profit margin, users can drill directly into the supplying production order showing variance to estimates, with further point-and-click drill down to the lowest levels of details contributing to the issue. For time and material jobs, you can keep your customer up-to-date so that there are no surprises. For fixed bid jobs, you can take immediate action to prevent further reductions in profit margin.

The user interface for each document in the lifecycle is identical in layout, making VISUAL a powerful yet intuitive solution during implementation and when training new hires within your organization.

Likewise, your procurement cycle from request for quote to payment follows the same 360° graphical view, linking supply to demand on the sales side. From the sales lifecycle, employees can drill to a specific supplying material order and its full lifecycle all with just a point-and-click. No more jumping from menu item to menu item searching for information.

With Infor VISUAL all functional areas of your organization are linked together as a tightly woven fabric.

Manufacturing Window



The Manufacturing Window is at the core of the Infor VISUAL solution. It not only representing the master engineering component driving production, but also provides an immediate and ongoing indication of delivery and cost performance for your customer's orders.

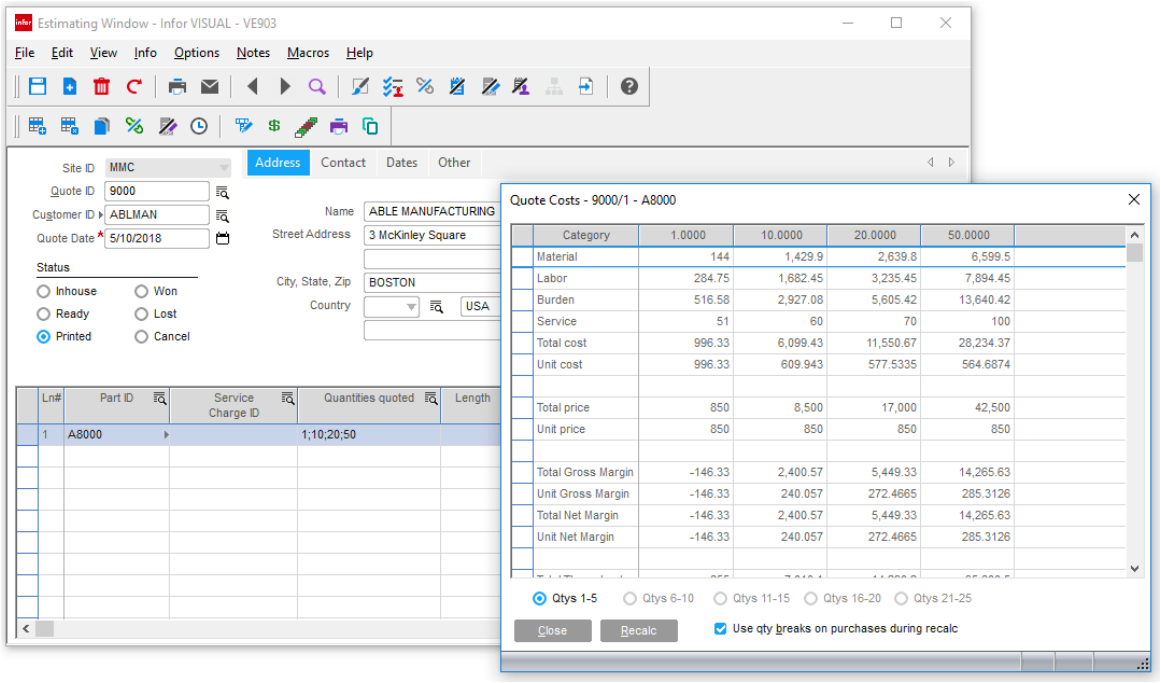
At the core of VISUAL is the Manufacturing Window, which graphically represents the build structure of your product. Whether quoting a new job or placing a customer order, it's the build definition created through the Manufacturing Window that is the catalyst for material planning, cost accounting, and production scheduling.

The full-color user-configurable graphical user interface provides a complete multi-level view of all operations and materials required to complete the job, indicating individual operation, material, or assembly status, along with detailed delivery and cost projections. Everything you need to know about a customer's order is at your fingertips in the Manufacturing Window.

Through this patented manufacturing design concept, sales representatives can:

- Perform "what-if" capacity and material checks for determining potential new order delivery dates.
- Check on the delivery status of an existing order based on its current positioning within the live production schedule.
- View up-to-date actual costs with projected job costs, highlighting all negative variances.
- Determine any changes to anticipated gross profit based on cost projections.
- View the complete production schedule of the order
- Drill-down to all levels of production and cost details
- Review all drawings or attachments associated with the customer's order.
- View the complete orders sales lifecycle
- View the lifecycle of all material being purchased to complete the job.

Quoting and Estimating

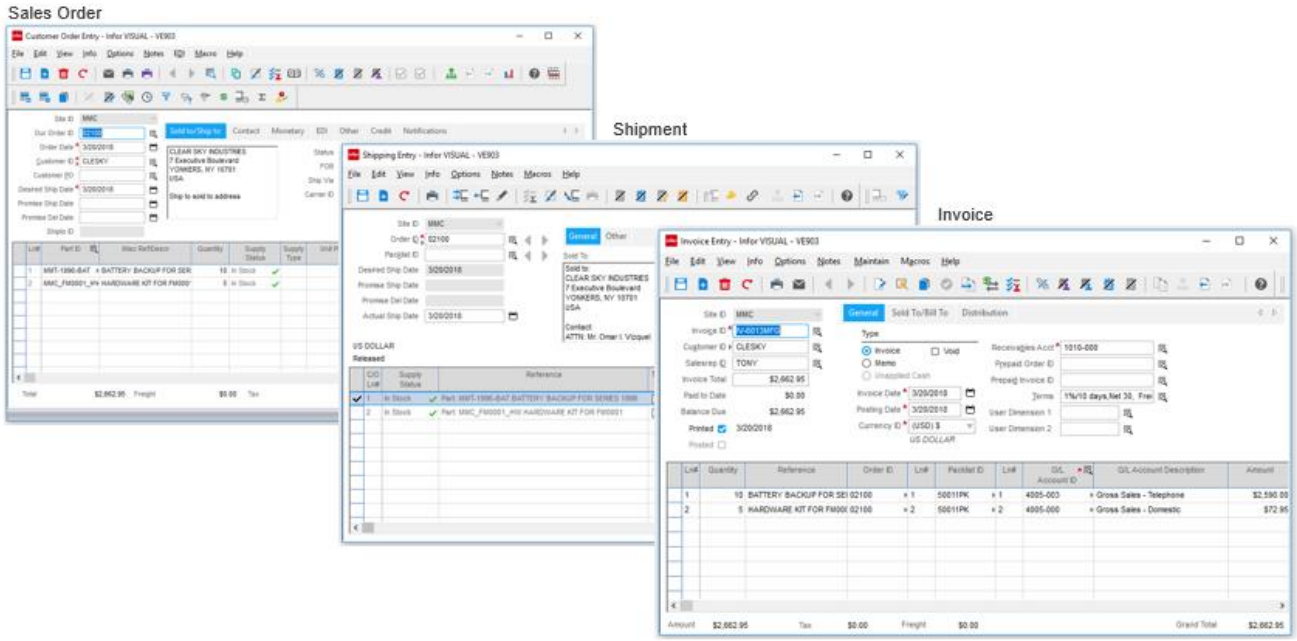


Create quick, accurate quotes for common products, custom jobs, and everything in between with the Estimating Window.

Infor VISUAL's Quoting and Estimating capabilities allow you to create professional and comprehensive quotations, determine realistic delivery dates based on material and resource availability, and, more importantly, convert quotes into sales orders and work orders when you win the business. Because your quoting effort is retained, you can compare as-quoted costs and information to as-built. You can create quotes quickly and easily by copying from another quote, an existing work order, or the Engineering Master, then modifying the new quote to match the customer's specifications. For highly configurable products, a rules and parametric configurator is also available. Infor VISUAL computes multiple quantity cost estimates based on complete material, labor, burden, and outside services, with variable markup options to determine selling price. When awarded a contract, you can easily create both a sales order and a work order from the quote.

- Create, view, and modify quotes quickly and easily using a graphical display and point-and-click
- Specify separate markups for material, services, labor, burden, and GSA.
- Copy a quote from another quote, a work order, or Engineering Master and then make modifications as necessary.
- Choose your material pricing source from a one-time quantity price table, the engineering master, supplier quote, or standard cost.
- Use a what-if analysis to verify material availability and production capacity to determine a delivery date, with the option to reserve this capacity.
- Print the pro-forma, quotation, and overall cost /budget report for the estimate.
- Automatically generate supplier RFQs (Request for Quote) for material required.
- Import quotes from Microsoft Excel templates.

Sales Order Entry to Invoicing



Document to document standardization simplifies the learning process and makes accessing information intuitive.

With Infor VISUAL's sales order to invoicing process, you can easily generate each sales document, while attaching business documents like the customer's purchase order, product drawings, and contracts. Internal personnel can record activities such as emails, meeting notes, invoice collection information, or any other dialog or attachments that would otherwise be stored in remote disparate data islands of information. This provides customer service representatives with a complete 360-degree view of the entire customer order.

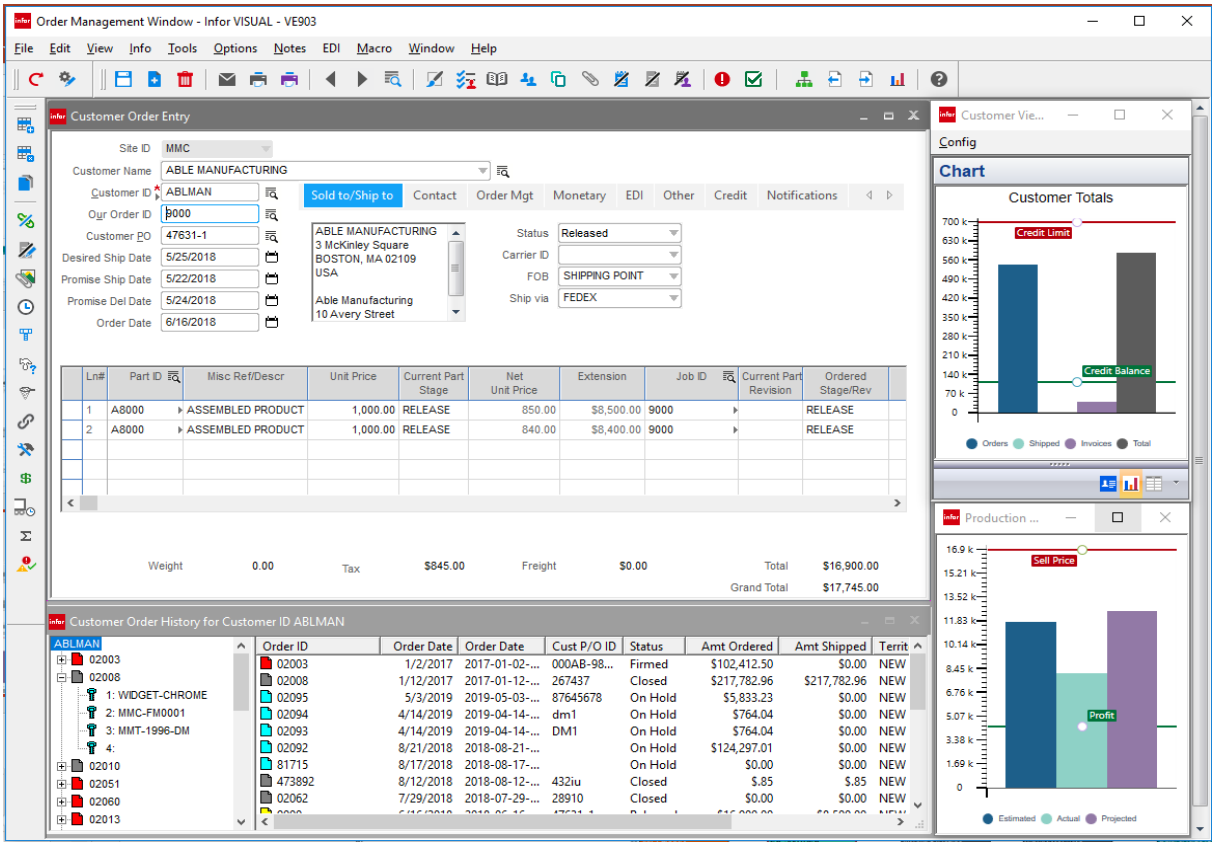
Infor VISUAL's sales order is fully integrated from the point of customer quotes through customer order entry, engineering, production, costing, shipping, and customer service. Customer service representatives can use this information to take action on credit problems, reschedule requirements, and release orders in time to meet required shipment dates. This interconnectivity provides access to crucial data including general customer information and credit status, order backlog, material and resource availability, order acknowledgments, commissions, percentage of completion, and shipping information. Comprehensive sales analysis reports help decision-makers track everything from customers to sales representatives.

- Generate customer orders from quotes to automatically create order line item details within firmed work orders
- Access online information including customer open order balance, open receivable amounts, last payment date, average payment days, last order date, and total payments.
- View clear signals of credit limits, aged receivables, and item availability when entering customer orders.
- Access information about customers including, but not limited to, customer price lists, discounts by item and customer, as well as customer item numbers, descriptions, and drawing numbers.
- Calculate sales tax by order or by individual line item.
- Specify sales commission splits with variable percentages.
- Print pre-formatted sales orders, sales acknowledgements, invoices, and shipping labels, as well as comprehensive sales

analysis reports by product code, customer, or sales representative.

- Create multiple delivery schedules and shipping addresses, allowing quick and easy entry of Blanket Orders for customers.
- Record and process RMA (Return Material Authorization) information for orders.
- Use train-of-thought drilldowns to track and view status of customer orders from this window, drilling directly to the supplying manufacturing orders for a complete picture of status and cost projections.

Order Management



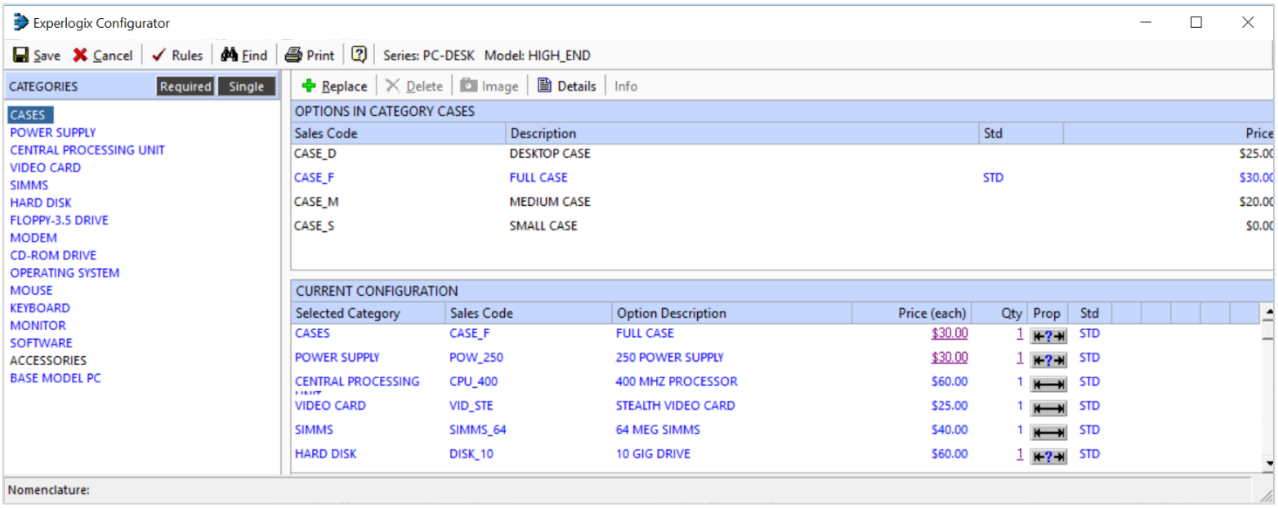
The Order Management window unites order entry, customer order history, and shipping functions in one easy-to-use interface

Use Order Management to manage a large volume of customer orders and meet varied fulfillment objectives. The application helps users manage customer order allocation and new product deployment planning throughout the supply chain.

You can use Order Management to achieve optimized fulfillment, rapid order processing cycles, cost-effective sourcing of inventory to customer orders, and increased revenue with capabilities such as substitution, cross-selling items, and Value Added Services.

- Save time processing orders with easy-to-use Windows features and Drag-and-Drop capabilities.
- Improve customer support, order monitoring, and order maintenance with access to detailed order status information.
- Confirm current inventory availability and future availability.
- Define primary and alternate warehouses for each customer.
- Track inventory easily.
- Reserve inventory for priority customers with future ship dates.

Product Configuration



Extend VISUAL's estimating and sales process with the Product Configurator when products that you sell contain any number of dimensions and options.

The Infor VISUAL Product Configurator is a development tool for manufacturers of complex, highly configurable products with numerous standard and available options. Your sales force can use the Product Configuration to correctly customize and configure your product and quickly and easily create quotes and customer orders in Infor VISUAL. The Product Configurator is sophisticated and includes a compatibility engine that handles all requests for changes to the base specification through an easy-to-use Windows interface. The result is a product specification that has been fully checked for component compatibility and completeness.

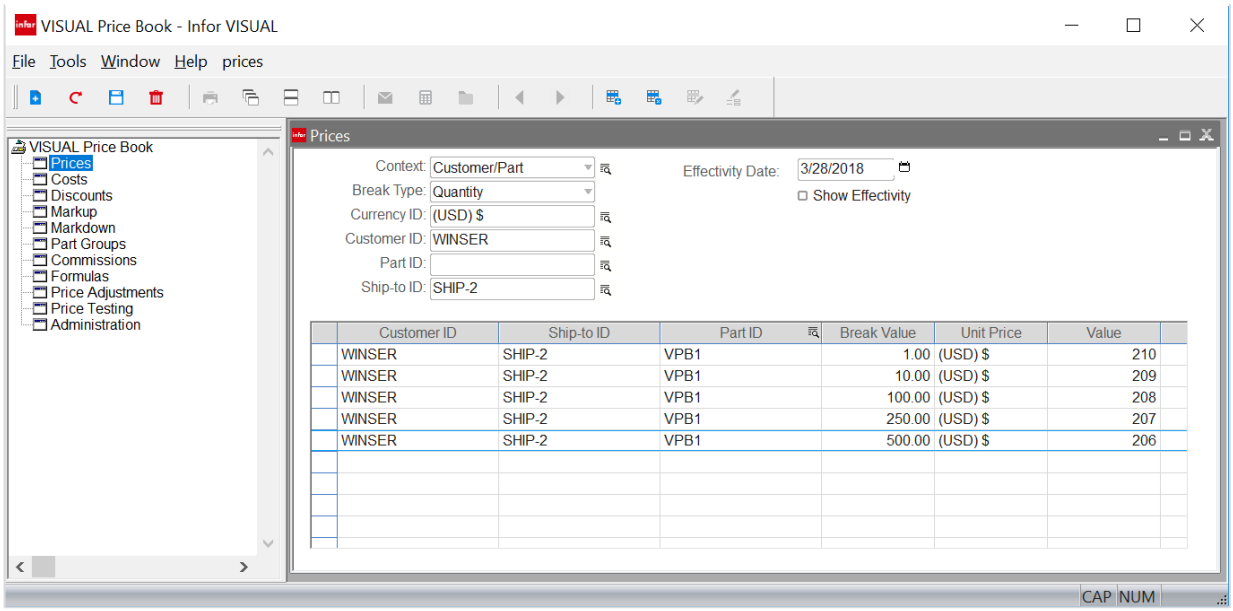
The VISUAL Product Configurator includes a rules-based engine enabling accurate point-of-sale customization, configuration, and pricing as well as a parametric engine allowing for the setup and creation of Bills of Material and Engineering Masters based on user-defined criteria.

You can create a set of options and assign a series of complex formulas which, in turn, define the possibility of custom items, configured and priced based on the customer's needs.

Create engineering designs for complex engineer-to-order or configure-to-order products using rules-based parameters.

- Define engineering rules for including, excluding, and combining features.
- Define complex, user-defined formulas for weight, quantity, and length calculations.
- Configure your product 's features and options dimensionally.
- Maintain product, data, and price information quickly and easily.
- Create a quote and production order automatically from an engineering design.
- Enter catalog numbers easily with Product Code Nomenclature.
- Integrate various toolkits for use within the Configurator.

Price Book

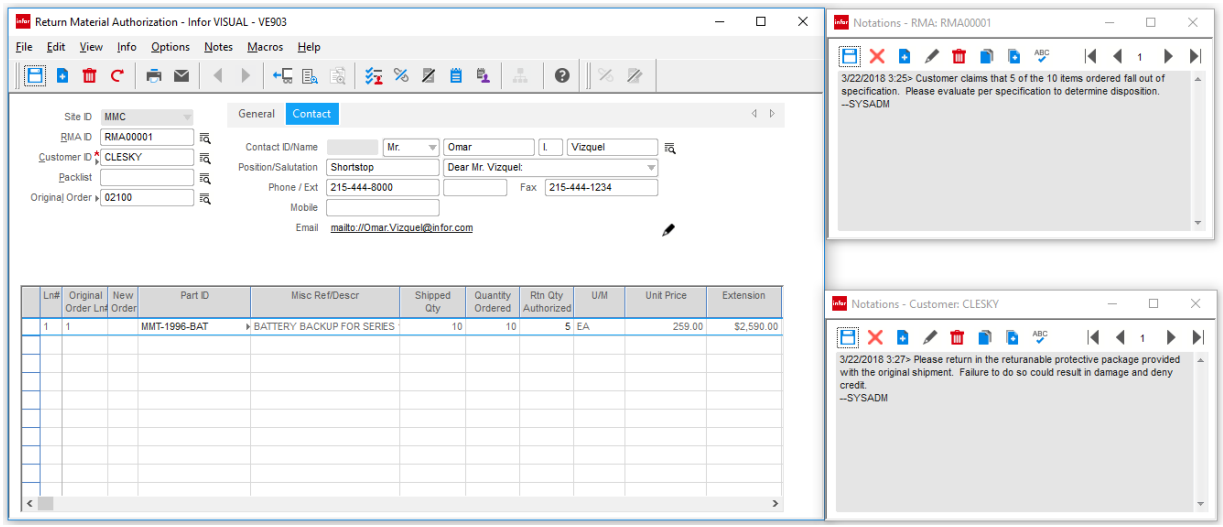


Use VISUAL Price Book to define pricing for your products, discounts for your customers, and commissions for your sales staff in one, centralized interface.

VISUAL Price Book is a flexible pricing and commission tool that further extends VISUAL's core pricing. You can easily group products in support of pricing changes and promotions. You can create formulas to address just about every pricing scheme imaginable.

- Establish price breaks based on cost or quantity (e.g., spend $100 and get a 20% discount, or buy two and get 20% off).
- Set up prices by customer, item, market, commodity, or groups.
- Adjust prices across the board to eliminate manual and redundant price changes.
- Use custom formulas to create any combination of prices or discounts.
- Define commissions for sales staff.

Return Material Authorization (RMA)



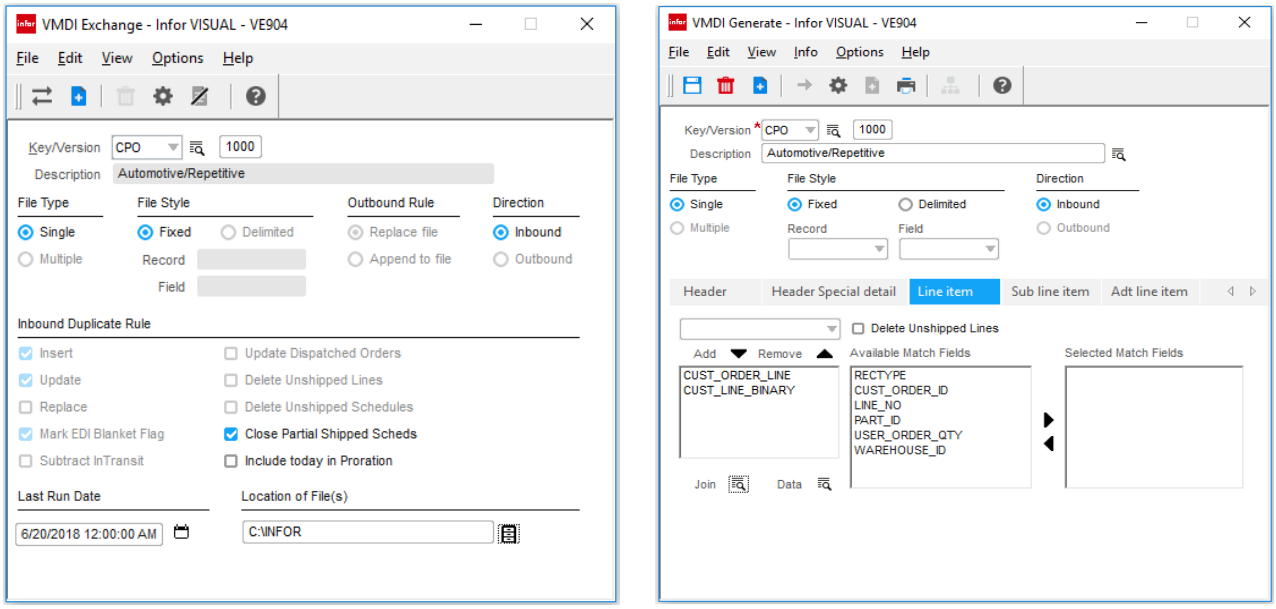
Use the Return Material Authorization window to quickly address customer returns and replacements while accurately tracking your costs.

Infor VISUAL allows companies to manage Return Material Authorizations (RMAs), documents that control the return of items previously sold and shipped to a customer. The RMA document contains the ID, status, and other identification about who is returning the material and for what purpose.

Costing issues become complicated when you have repairs and replacements, especially when taking into consideration that the original customer order may not exist in the system, or that the items being repaired originate from another source. Use Infor VISUAL's RMA process to evaluate all costs associated with repairs and replacements.

- Maintain documented control over the return of items.
- Track information that will improve both your customer service and overall item quality.
- Receive material returns for customer credit or exchange.
- Issue repair or replacement orders for returned materials.
- Support cross-shipping of replacements (ship replacement prior to receiving returned goods) for minimal customer downtime and optimal customer service.

Electronic Data Interchange



Use VISUAL EDI to reduce paperwork, conduct business transactions in a timely manner, and eliminate redundant data entry.

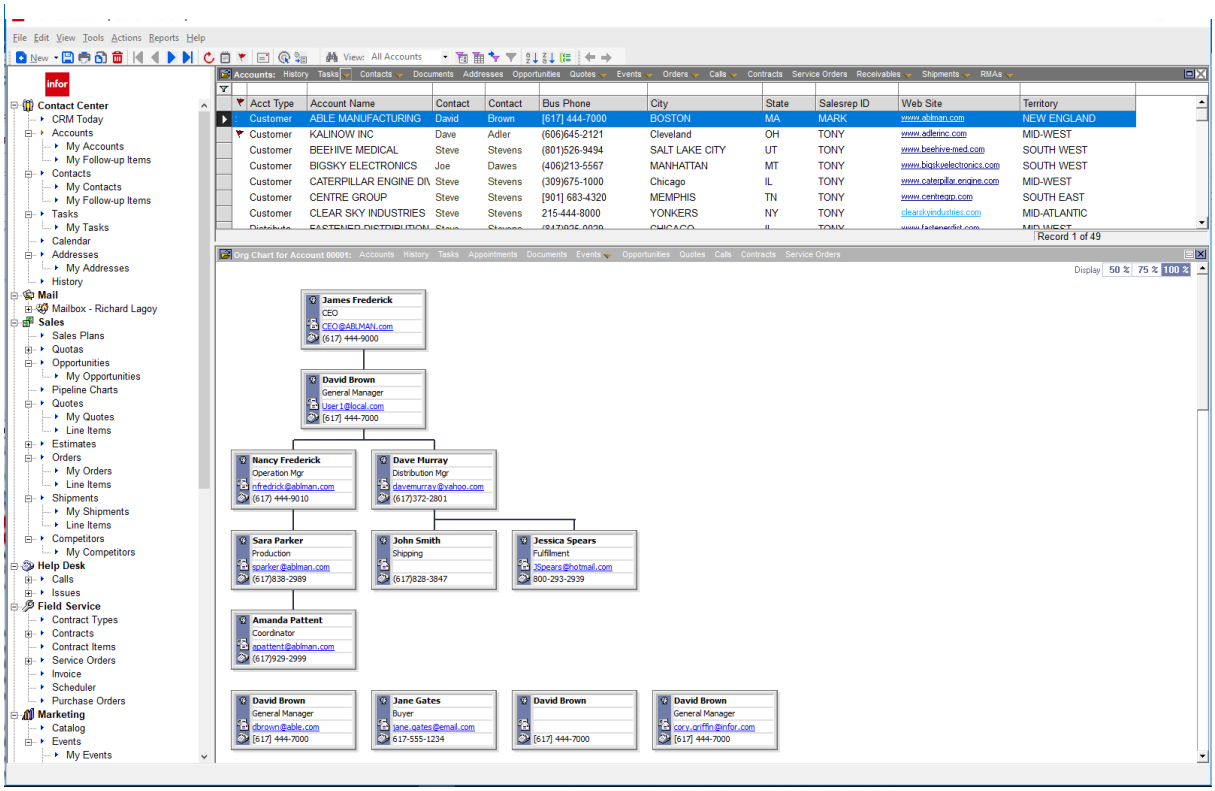
Manufactures supplying products to Tier 1 manufacturing companies or big box retailers are all too familiar with the need to receive and send information electronically. VISUAL's Data Interchange feature can help you reduce paperwork and administrative lead times, send timely business transactions, access information quickly and easily, and eliminate redundant data entry. These benefits allow your enterprise to adopt more efficient practices such as Just-In-Time, Quick Response, and Direct Store Delivery.

To achieve the maximum benefit of implementing EDI, you must integrate this business process with your existing enterprise systems. Infor VISUAL Data Interchange helps you accomplish this task by providing a link between your EDI exchange service data and your Infor VISUAL solution. You can import firm demand to customer orders, track cumulative quantities, and maintain fabricated and raw material authorizations. In addition, you can use customer order import to automatically access and update pricing, units of measure, contact information, terms of sale, and ship-to information if needed.

- Create standard transactions to meet EDI requirements of your trading partners.
- Convert inbound EDI documents into customer orders and forecasts.
- Manage releases and ship schedules from your customers.
- Maintain fabricated and raw material authorizations.
- Cross-reference Customer Item IDs to Infor VISUAL Item Numbers.
- Create outbound data files for ASN's, vendor PO's, warehouse ASN's, material receipt notices and invoices.
- Track and enter orders using features such as ship-to by line item and delivery schedule line.
- Operate your integrated EDI processes manually or in unattended or hands off mode.

Customer Relationship Management

VISUAL Contact Center



Use VISUAL CRM's Contact Center to track important information about your customers and their colleagues.

Contact Center integrates virtually every customer touch-point from one central location. All business contacts, customers, prospects, and leads are available instantly. The Contact Center helps to automate marketing and sales activities to track performance and generate more revenue.

Contact Center is offered as part of the standard functionality within Infor VISUAL. It helps you retain your existing customers and acquire new accounts by tracking everything there is to know about your prospects and customers.

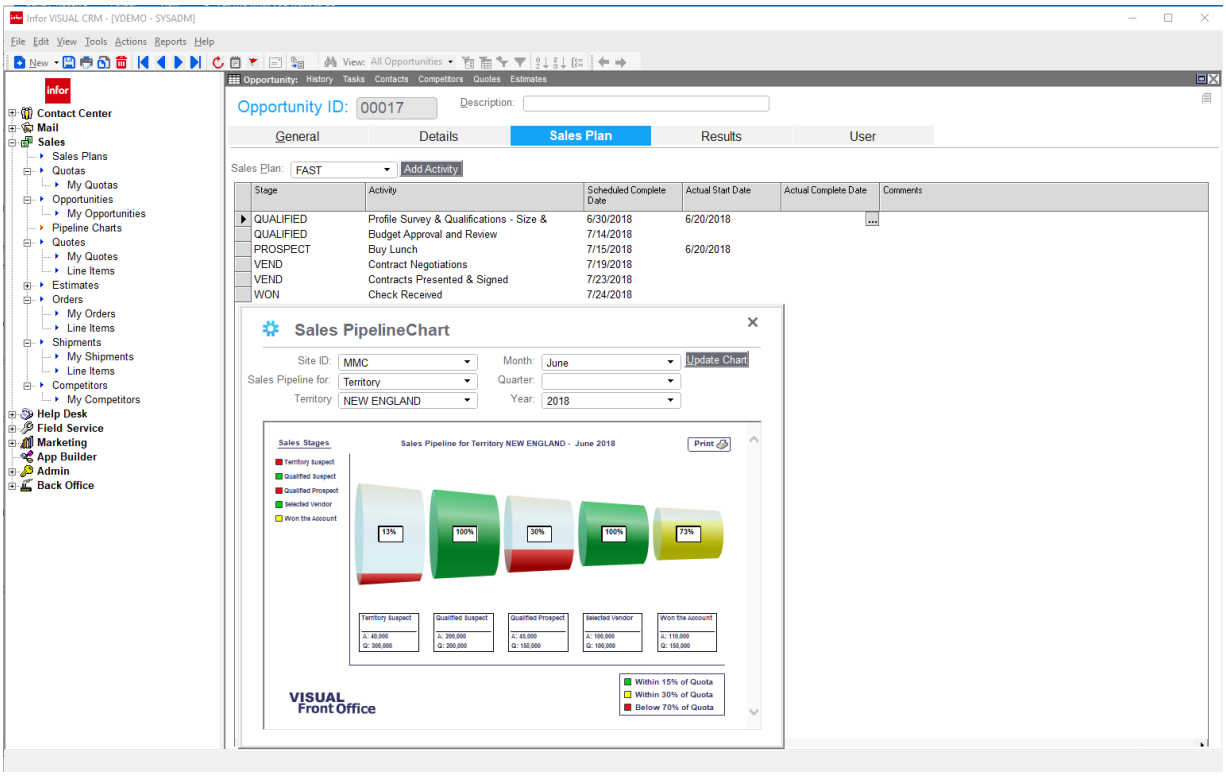
You can easily view histories, tasks, and other sales data for every contact, at every account. You can also access important back office data such as accounts receivable, current item inventory, return material authorization (RMA) status, estimates, sales orders, credit status, shipments, and more.

- Access your company, product, and pricing events with the fully customizable CRM Today Electronic Bulletin Board.
- Send emails, letters, and documents easily with direct integration with Microsoft® Office.
- Use the Mail Merge feature to instantly send information to multiple contacts.
- Schedule and assign tasks and activities, and track details such as driving directions and meeting notes.
- Convert prospects to customers automatically without redundant data entry.
- Track calls, meetings, and To Do tasks with Calendar Management.
- Customize views and classify contacts or accounts with user defined fields.
- Create organizational charts to easily track account decision makers.

- Develop on-the-fly custom reports or view important data using the standard reports included in Contact Center.

- Customize the Navigation Explorer Bar to execute other applications that you use daily.

VISUAL CRM Enterprise



Deploy VISUAL CRM Enterprise to track your sales pipeline from opportunity to closed sales, and to manage post sales activities with help desk and services.

Extend VISUAL's Contact Center to fit your business needs with VISUAL CRM Enterprise. From managing your sales pipeline and marketing campaigns, to help desk and product servicing, VISUAL CRM Enterprise will help enhance your customers' experience by streamlining the entire pre-and post-sales processes.

Sales

- Develop price quotes and accurately configure products using the optional Parametric Configurator.
- Convert quotes to estimates and orders automatically without redundant data entry.
- Develop sales plans to chart the next step in a sales cycle.
- Develop and analyze revenue pipelines.
- Assign quotas by sales representative, territory, business unit, branch, or division

Field Service

- Manage service orders, warranty and maintenance contracts, dispatch scheduling, RMAs, inventory, and billing.
- View maintenance schedules and assign appropriate technicians to service orders.
- Trace issues by Item ID, serial number, or service contract.
- Auto-generate invoicing and assign charges to the General Ledger.

Help Desk

- Track customer calls and create a knowledge base of issues and resolutions.
- Log calls based on Item ID, serial number, product categories, and service contracts.
- Prioritize calls and assign them to specialists for resolution.

- Track the history of each resolution attempt, complete with a time, date, and user ID stamp.
- Track and invoice billable hours.

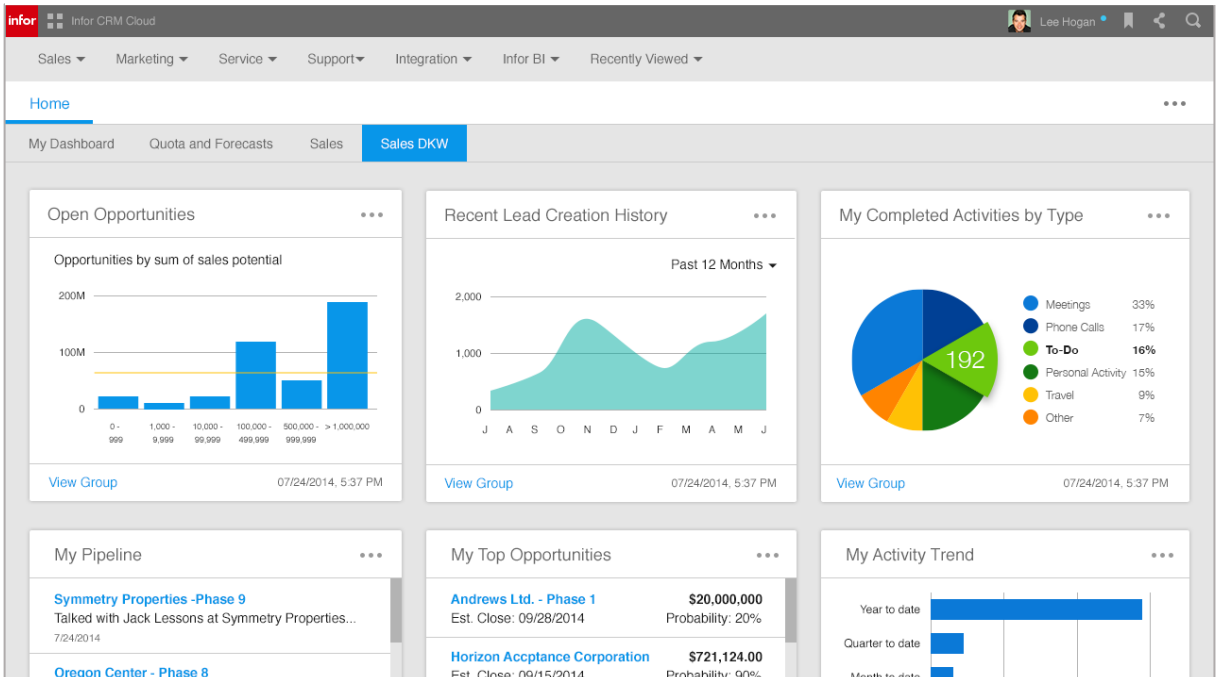
Marketing

- Track the effectiveness of your campaigns and events.
- Maintain catalogs of marketing literature and automate literature fulfillment.
- Plan targeted strategies and increase your overall marketing ROI.

Admin

- Create custom applications as standalone or linked to an existing application with App Builder
- Extend existing applications with User Defined fields
- Secure user access to the navigation bar, applications, reports, menus, records and fields with Security.

Infor CRM



When ease of deployment, scalability, and mobility is required, Infor CRM is the next line of defense to satisfy your CRM needs.

Infor CRM is the platform of choice for companies strategically focused on customer engagements. Robust functionality, deep integration, and high flexibility in how you use and deploy your solution result in a solution that works the way you need it to.

CRM for the mobile world

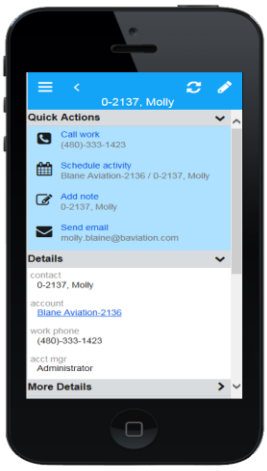
Infor CRM Mobile extends rich functionality to smartphones and tablets, giving your mobile workforce a strong competitive advantage. Interactions with native device features such as mapping, dialing, and email further streamline the mobile user experience. Receive over-the-air updates automatically at no additional charge.

Better interactions

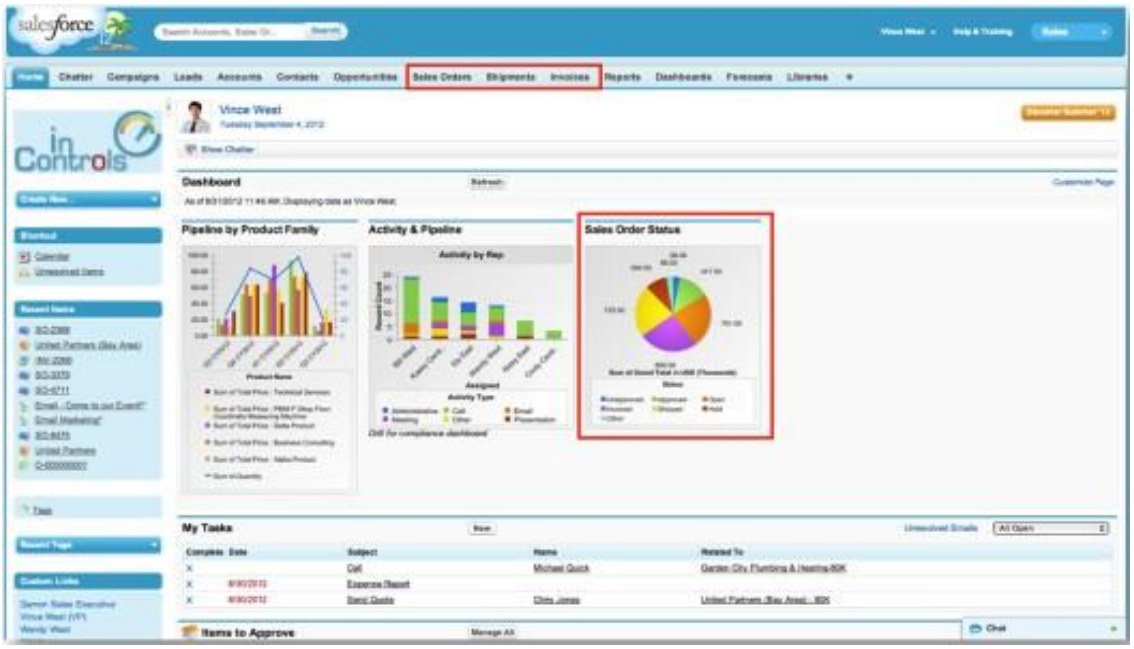
Rich customer profiles and sales productivity tools help users identify opportunities and streamline sales activities. Simultaneously, sales management tools, analytics, and proactive alerts drive accurate forecasting as well as effective team and territory management. Best-practice process automation recommends and performs winning actions that drive results

Ultimate flexibility

Attain unparalleled flexibility and control in how you deploy, use, and pay for your CRM solution. Cloud, on premise, hybrid, and mobile options accommodate your business needs. Buy, finance, or subscribe while maintaining full control of your data. Select from and mix multiple license types to lower TCO and align diverse user requirements.



Infor Back Office Connect



For companies with an existing investment in Salesforce, deploy Infor Back Office Connect to give sales representatives access to customer-related information within VISUAL.

If you use Salesforce as your CRM solution, you can use Infor Back Office Connect to easily share real-time data between VISUAL and Salesforce. Your sales teams have up-to-the-minute information about the status of their customers 'orders, shipments, invoices, and payments. With a greater understanding of each account, your sales and service teams take a more consultative approach to qualify better, run more credible sales cycles, and lower your total cost of sales.

With Infor Back Office Connect, your ERP applications can leverage a market-leading CRM solution in a way that truly makes sense for your business. Your marketing, sales, and service teams get ERP-managed information and processes. Your order fulfillment operations group gets accurate sales forecasts.

Infor Back Office Connect is an Infor ION technology-enabled solution that gives you a 360-degree view of your customers. By connecting your front and back office systems with ION technology, the same middleware framework that seamlessly integrates other strategic solutions with Infor VISUAL.

Through Infor's unique partnership with Salesforce.com, we have developed new functionality, fields, and screens specifically for Infor ERP customers. With Infor Back Office Connect you can:

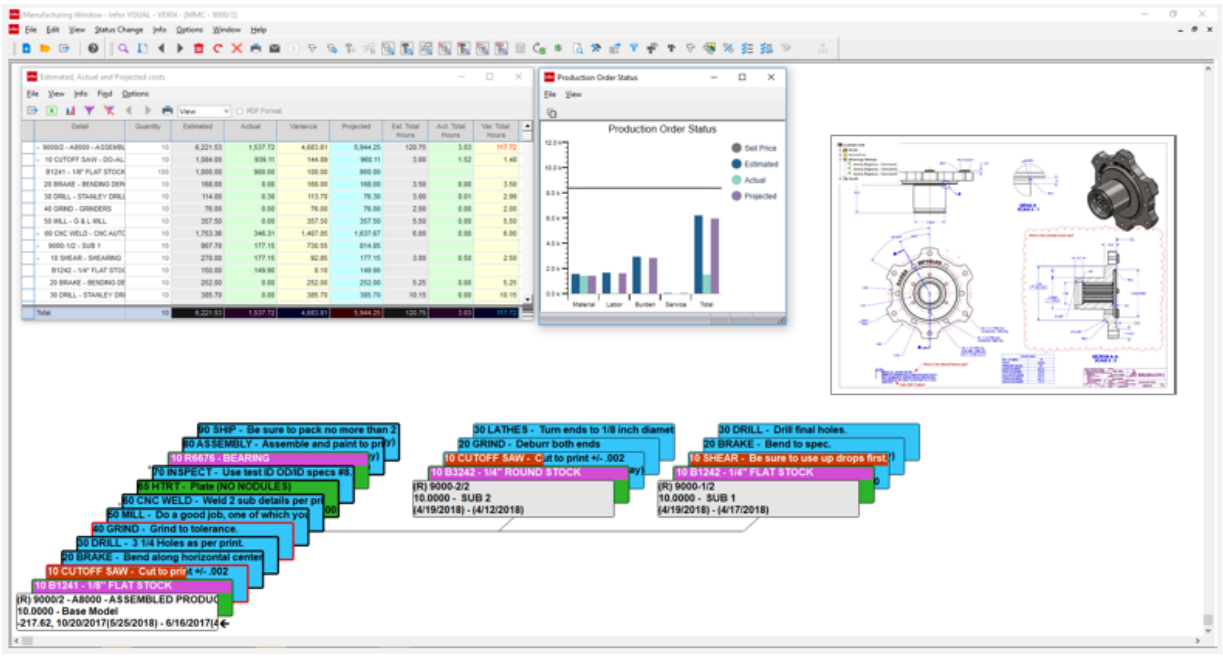
- Accelerate your CRM implementation by leveraging existing ERP information
- Bring ERP and CRM together to create a more responsive and effective enterprise
- Put real-time ERP information in the hands of your salespeople

You can also provide customer-facing personnel with a complete customer profile that includes ERP-managed customer information, such as:

- Customer contact information
- Customer logistics such as ship-to, bill-to, and pay-from addresses
- Detailed customer transactions including quotes, orders, shipments, invoices, payments, and returns

Manufacturing & Engineering

Manufacturing Window



The Manufacturing Window turns your engineering plans into products and sales through seamless integration with work order and quote creation.

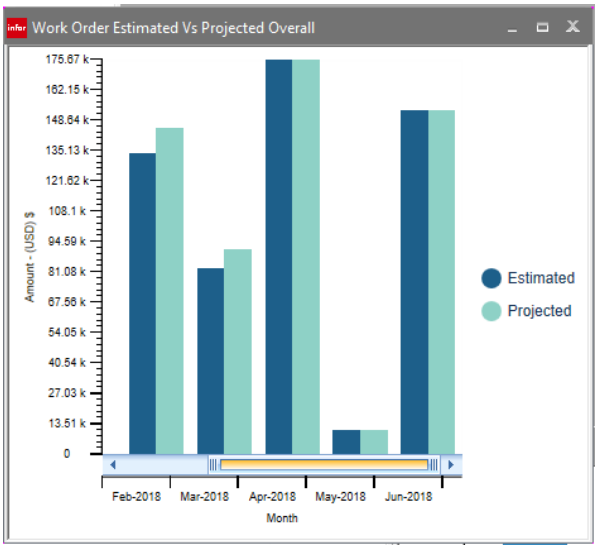
The Manufacturing Window is the master engineering and production management application for Infor VISUAL. The Manufacturing Window provides master process definition, work order creation, and the seamless integration to scheduling, material planning, purchasing, and order management needed to realize the manufacture of products. Comprehensive tracking tools provide complete as-planned and as-built data from the highest level of summarization to the lowest level of detail for each individual transaction. This powerful window is the catalyst for material requirements, cost accounting, capacity planning, production scheduling, and more.

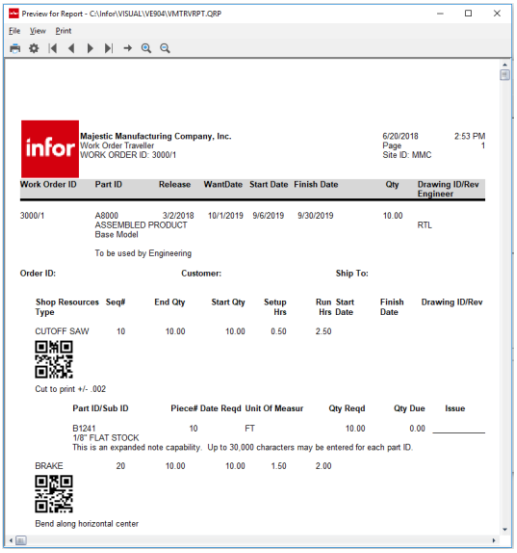
You can use the full-color, graphical interface to quickly and easily create manufacturing engineering plans coupled with Bills of Material (BOM), then use the design to automatically create a quote or work order. The display and reporting features of the Manufacturing Window provide an at-a-glance view of the materials and operations involved in the engineering process.

- Create, view, and modify engineering plans with a graphical display with point-and-click technology.
- Choose your view for the Bill of Material and routings, either graphical, text, or grid, single or multilevel, hierarchical, or split-window. Or, you can define up to six custom views with color-coding and size options.
- Display full dynamic production and material costs with estimated, actual, variance, and projected costs.
- Perform what-if scheduling, availability checks, and material netting with the option to generate purchase orders.
- Maintain revision history for the manufactured product.
- Create quotes and work orders automatically from the engineering master.
- Drill down to view labor and inventory transactions without leaving the Manufacturing Window.
- Evaluate the progress of each aspect of the work order with completion meters. You can see the status of the work order, individual operations, materials, and outside operations.

- Drill to the customer’s order lifecycle to see the progressing of a production order from quote to cash.
- Drill to material supply orders to see the entire lifecycle of incoming material used to produce the manufactured item.
- Add one-time purchased items without requiring an item ID, which ensures that you do not clutter the item master file with items that will never be used again.

Production Control



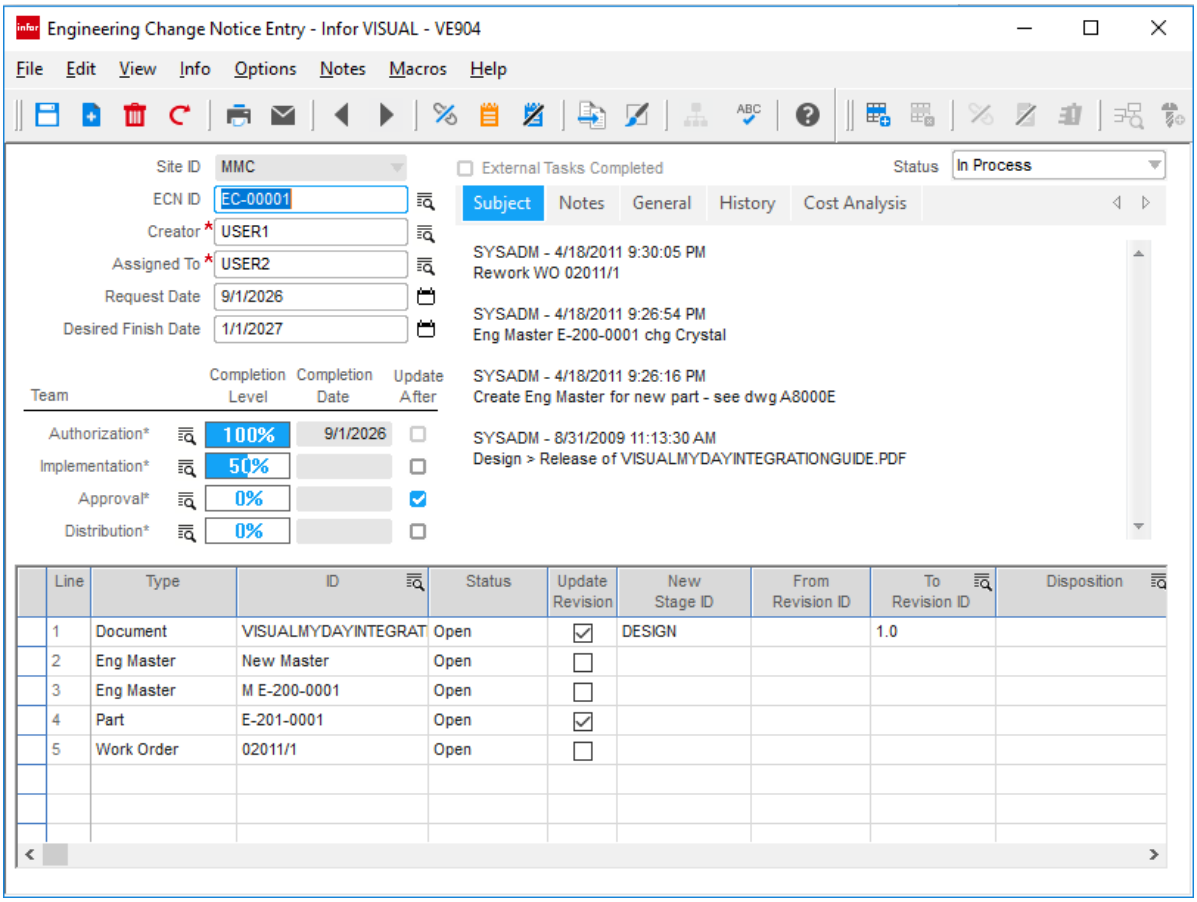


VISUAL offers a full range of screens and reports to help you drive and analyze your production.

Infor VISUAL offers you complete production automation and control through seamless integration of all its features, including inventory control, material and labor tracking and reporting, purchasing, and production scheduling. Infor VISUAL's tightly integrated features eliminate redundant data entry, ensures consistency and accuracy throughout the shop floor, and makes navigation intuitive and easy to use. With Infor VISUAL you can:

- Generate work order travelers that include work instructions, linked files, design documents, pictures and bar codes for reporting labor and material.
- Capture and analyze all labor, material, burden, and service costs charged against each work order.
- Schedule orders individually, by a selection set, or collectively to monitor the load on your shop floor.
- Dispatch work to each resource through onscreen, printed, or mobile devices.
- View the immediate status of completion for a job.
- Receive to stock or ship from the floor.
- Ensure accurate inventories by linking purchased materials to work orders.
- Manage material requirements by the job, by stocking levels, or a combination of both.
- Manage and conduct your business based on up-to-the-minute information, a result of seamless integration of order entry, inventory, production, shipping, and invoicing.
- Create dashboards showing historical and projective analysis.

Engineering Change Notice

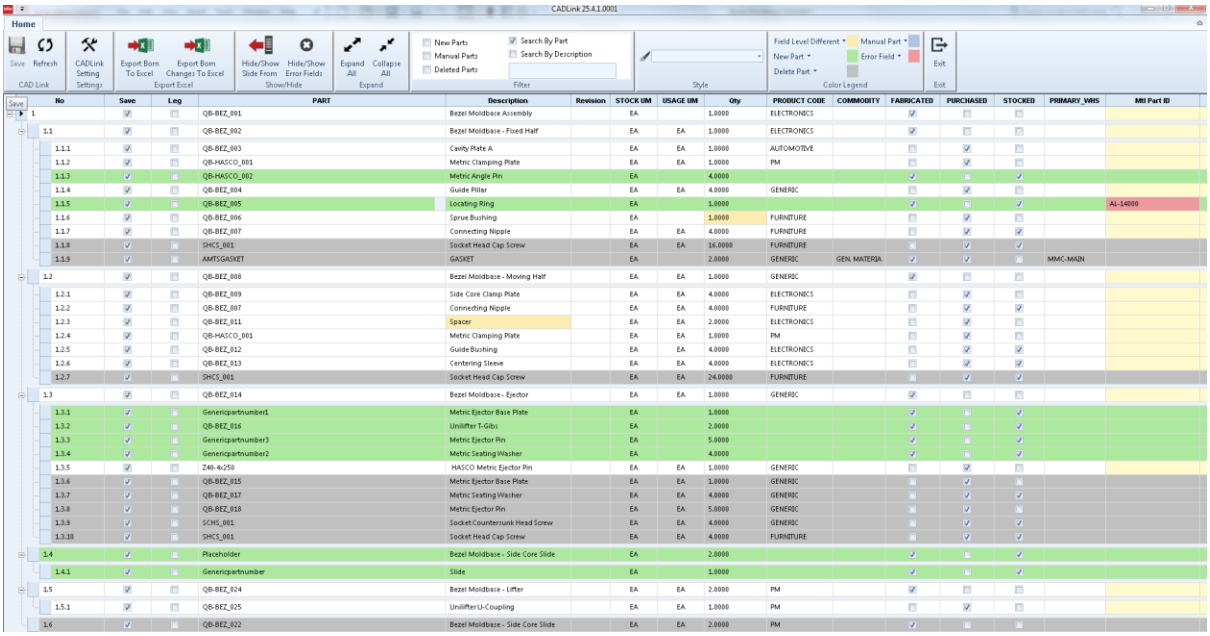


Use VISUAL's Engineering Change Notice feature to track changes to your engineering processes and bills of material, notify interested personnel of impending changes, and ensure that your products are manufactured to your specifications.

Establish controls and manage the process of making changes to documents and drawings, items, Bills of Material (BOMs) and routings, work orders, and projects with VISUAL's Engineering Change Notice (ECN) module.

- Create an ECN process flow with multiple ECN user groups and notification systems.
- Generate and track ECN tasks and apply electronic signatures for approvals and task completion.
- Track ECN and revision history on all items, documents, bills of manufacture, work orders, and projects.
- Maintain an audit trail of changes to the ECN record throughout the change process.
- Maintain a comprehensive audit trail of changes to the Bill of Material and routings.
- Apply engineering changes to some, or all, relevant in-process work orders.
- Prevent transactions against items and in-process work orders while they are under ECN control and notify engineers and production personnel of pending changes.
- Update item or document revision levels automatically upon incorporating changes.

VISUAL CADLink



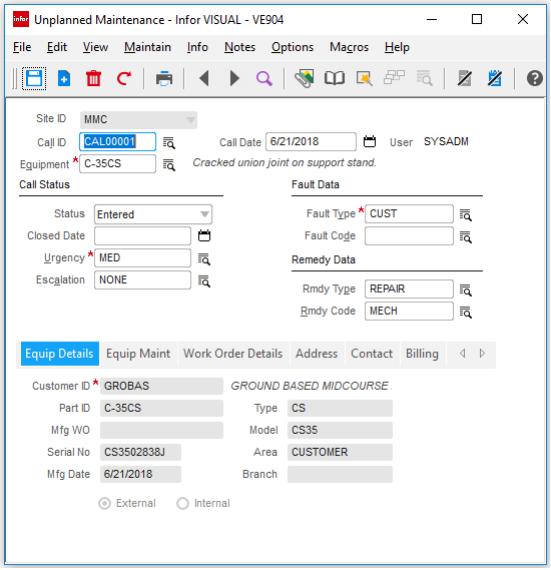
VISUAL CADLink provides a two-way integration between Infor VISUAL and the most popular CAD systems

Don't waste valuable engineering resources with laborious data re-entry tasks. With VISUAL CADLink you can make your preferred CAD platform a natural extension of the Infor VISUAL solution you rely on to optimize your manufacturing operations. As result, you'll be able get more done with less effort and free up engineers to do what they do best. Improve engineering focus for better results.

By combining Infor VISUAL with CADLink and your preferred CAD package, you'll be able to ensure a vastly higher degree of accuracy between your design process and manufacturing operations. That's because you'll eliminate error-prone manual steps required to reconcile information between the systems. You'll also improve your ability to make plans and execute those plans, because all relevant systems will contain consistent, accurate, up-to-date information. Put all that together and you get faster performance and better results.

- CADLink provides a two-way integration between Infor VISUAL and the most popular CAD systems, including:
  - AutoCAD®
  - NX™
  - Inventor®
  - Creo® (formerly Pro/E®)
  - SolidWorks
- Cut design costs, speeding design throughput.
- Reduce cycle time.
- Improve information flow reducing data entry errors eliminating Engineering Master inaccuracies.
- Eliminate engineering ERP clerical work.
- Ensure drawing data is consistent.

Plant & Equipment Maintenance



Use VISUAL's Plant & Equipment Maintenance to schedule maintenance tasks seamlessly with your production schedule.

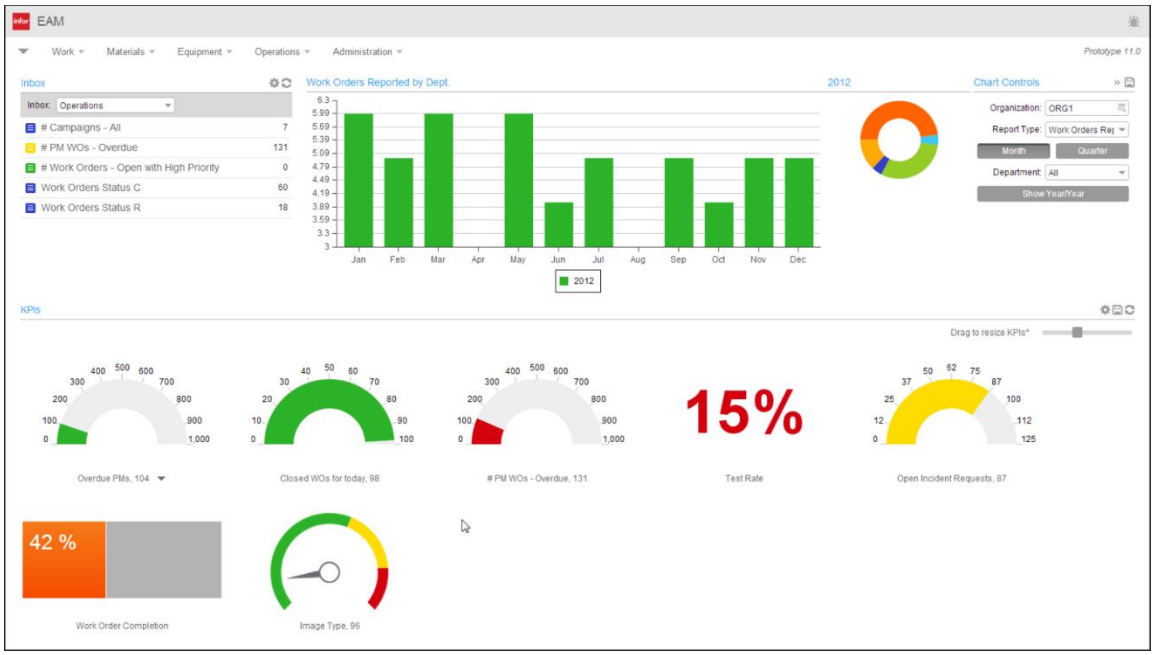
Plant and Equipment Maintenance improves your ability to schedule routine maintenance for internal or customer-owned equipment in a single system. You define the resources that are performing the maintenance and which product equipment is affected by the maintenance. You define the types of activity, what materials are needed, and how long they should take to complete. Pictures and detailed instructions guide maintenance personnel through the required tasks.

Regularly scheduled maintenance usually prevents most equipment problems from occurring, but unfortunately, unexpected problems do arise. Plant and Equipment Maintenance also helps you respond quickly to unplanned repairs with minimal effect on production and delivery. You can classify unplanned repairs by urgency and escalation, and you can record the cause and remedy for the unexpected maintenance.

You use the same tools for labor reporting, material planning for spare or replacement items, purchasing, inventory control and scheduling as you do for production. You don't need to learn another system to perform maintenance.

- Maintain schedules for preventative maintenance tasks for plant equipment, internally-used products, and customer-purchased products.
- Maintain multiple task schedules for a single piece of equipment (daily, weekly, monthly, annually).
- Generate work orders for maintenance tasks and remove production equipment from the schedule while performing maintenance.
- Schedule labor resources to perform tasks.
- Use current labor reporting and material handling principles already in place.
- Plan for maintenance items before you are out of stock.
- Assign service tasks to Regional and Branch locations
- Bill customers quickly and easily.
- Log and track reported problems into the intuitive Call Center display window.
- Record detailed information about unplanned maintenance activities including Fault Type and Fault Codes, Urgency and Escalation Codes, and response Remedy Type and Remedy Codes.

Infor Enterprise Asset Management (EAM)



Infor Enterprise Asset Management is an advanced asset management solution for organizations what require best in class control of their assets.

Capital assets often generate unseen costs that turn profit into loss. If you don‘t pay attention to the total cost of operating capital assets, you may be passing up the opportunity to ensure the success of your business for months or years into the future. Successful companies know that effective enterprise asset management (EAM) does more than add to the bottom line—it also reduces risk and gives your business a measure of stability that makes a big difference in volatile business conditions. Infor EAM delivers a time-tested solution that helps your company increase the life and value of assets, optimizes asset utilization, decreases costs of operation, and improves decision-making. It also gives you an easy-to-use solution that you can implement quickly.

Infor EAM is a powerful enterprise asset management solution that enables small and mid-size organizations to control critical functions such as work orders, purchasing, inventory, and preventative maintenance, without the investment and extended implementation time required for a larger-scale installation. Designed for companies with single or multiple sites, this solution increases productivity while reducing downtime by enabling organizations to manage several essential business functions from within a single web-based solution.

Infor EAM provides companies that have small or no IT departments with a full featured solution that delivers unparalleled insight into operations and can fully integrate with additional enterprise applications, advantages typically reserved for applications designed for large, multinational corporations. The security model is also uncomplicated, reducing installation time even further. System users access the features and functions of web-based Infor EAM software through a browser, working with an easy-to-use graphical user interface.

Features

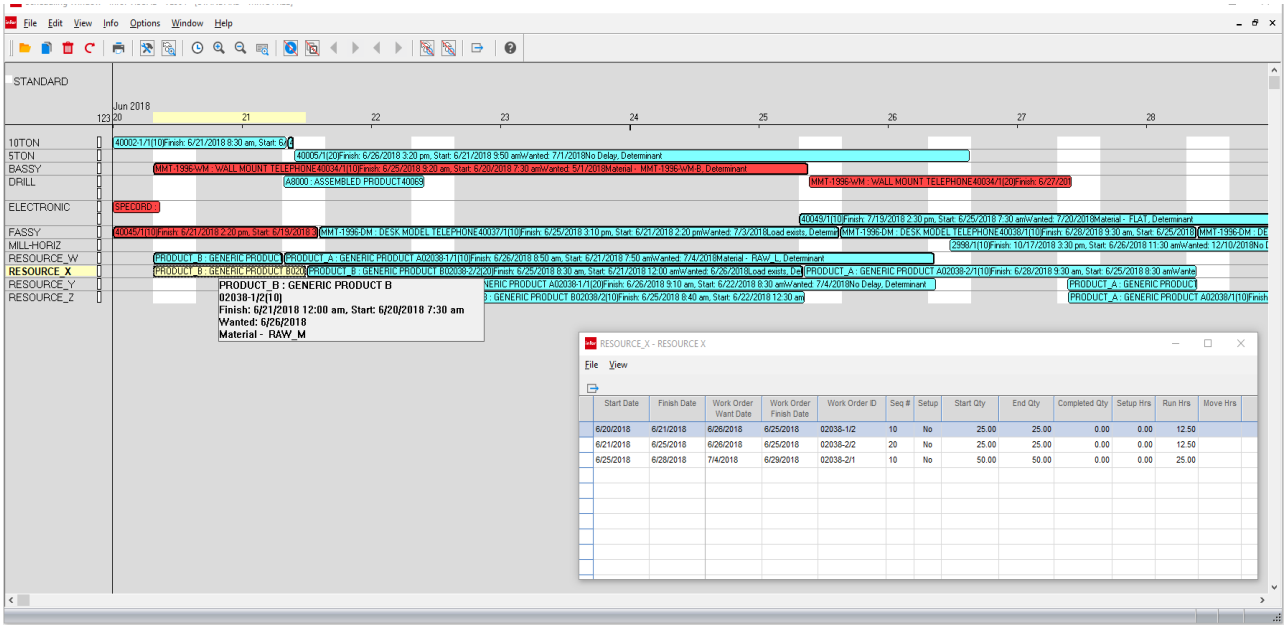
- Graphical User Interface
- Predefined Reports
- Key Performance Indicators
- Web Architecture
- Minimal Hardware

Modules

- Assets
- Work Management
- Preventive Maintenance
- Materials Management
- Purchasing
- Mobile

Capacity Management

Concurrent Scheduler



Use VISUAL's Concurrent Scheduling functions to help you manufacture products efficiently today and to accurately plan for long-range opportunities and changes.

Infor VISUAL's Concurrent Scheduling feature includes two powerful tools, the Global Scheduler and the Scheduling Window®, that work together to ensure the most efficient use of your materials and resources and provide the information you need to deliver your product on time.

Infor VISUAL was the first software system to feature Concurrent Scheduling, which considers both material and capacity constraints when generating your shop schedule.

The Global Scheduler develops a schedule for all firmed and released work orders based on due dates, priority, and resource and material availability. The Scheduling Window shows your schedule in a full-color, graphical format. You can zoom in to closely focus on a portion of the schedule, or zoom out to see the long-range plan of operations. You can quickly adjust your what-if schedule by dragging and dropping scheduled operations.

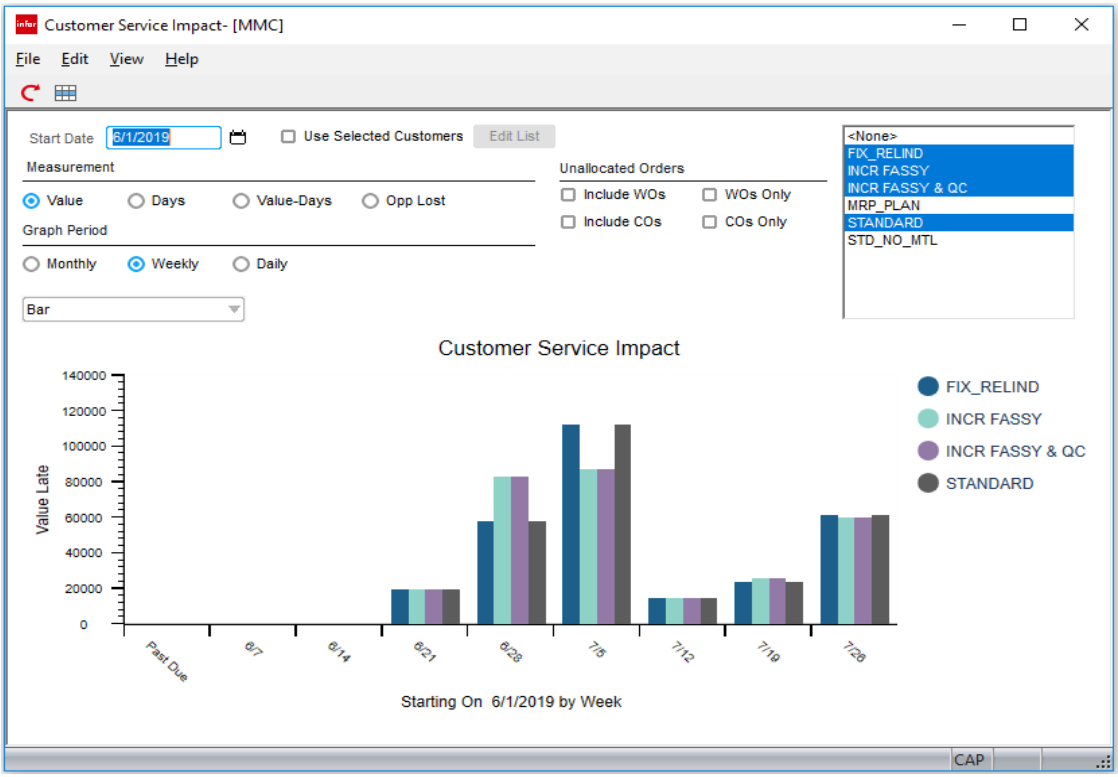
Unlike other schedulers, the Global Scheduler gives you detailed visibility on each scenario or attempt it makes to schedule a job. This gives you the most visibility in the industry into your scheduling constraints.

- Choose finite or infinite scheduling; optionally set individual work centers to infinite within a finite schedule.
- Verify material availability along with capacity.
- Use forward and backward scheduling capabilities to make the most efficient use of your resources.
- Calculate and display critical path and determinant path time lines.
- Perform a capacity analysis to determine when too much or too little capacity has been allocated to a work center, and when you have excess capacity for a resource.
- Run what-if scenarios to determine the effects of changes in capacity, load, or timing.
- Use Drag and Drop to make scheduling changes quickly and easily.
- View the comprehensive audit trail of scheduling attempts and results.

- Create shop views to focus in on your area of responsibility.

- Drill to work order details (Manufacturing Window) to view the overall status of a work order.

Common Sense Throughput for CEOs



Use VISUAL's Common Sense Throughput to identify ways to make your business more profitable.

Throughput is a measure of productivity that considers the contribution of a job or product toward company profit. It is calculated as the price of goods sold minus the cost to produce it. Infor VISUAL Common Sense Throughput™ is a strategy for using this information to aggressively increase the profit of a manufacturing company by working a schedule that will increase throughput.

Through the use of the Common Sense Throughput strategy, Infor VISUAL uses measurements not commonly found in ERP and MES systems. VISUAL uses the Throughput Window to access a variety of reports and inquiries: Actual or Expected Throughput reports, and Utilization, Contention, and Material Constraint inquiries. These tools provide the information to be discussed at the daily Common Sense Throughput meetings.

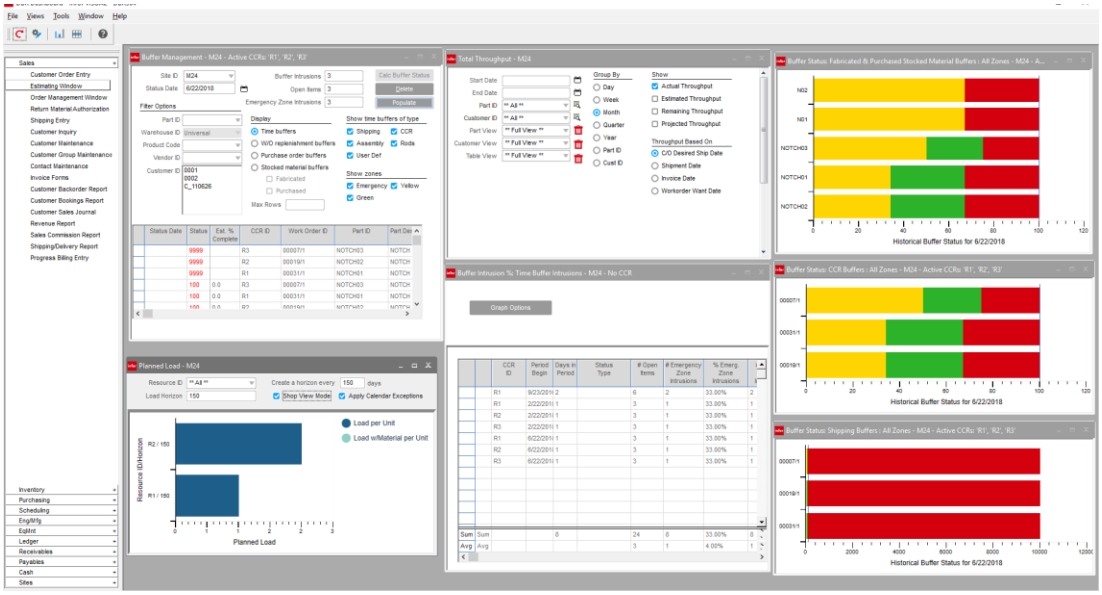
CEOs can use Common Sense Throughput to avoid incorrect decisions based on allocations and theoretical profit of a piece.

- View an audit trail that reliably identifies potential resource and material bottlenecks, both primary and secondary.
- Create throughput data for an unlimited number of schedule simulations.
- Obtain accurate measurements of absolute profit contribution.
- Graph throughput inquiries at a daily, weekly, or monthly level.
- Drill down to view shipment, costing, allocations, or work order finish date information.
- Compare and match customer orders with work orders.
- Choose to include unavailable or on hold inventory in inquiries.
- Determine the ten most frequently used resources by schedule, load/ capacity ratio, incidents of highest severity of contention, or user-defined time span.
- Create trend graphs by shop resource.

- View the past orders that have generated maximum throughput for time spent at bottleneck resources.

- Determine the orders in the future that should generate maximum throughput for time spent at bottleneck resources.

Easy Lean



Use VISUAL's Easy Lean feature to keep inventory levels low without compromising your response to your customers.

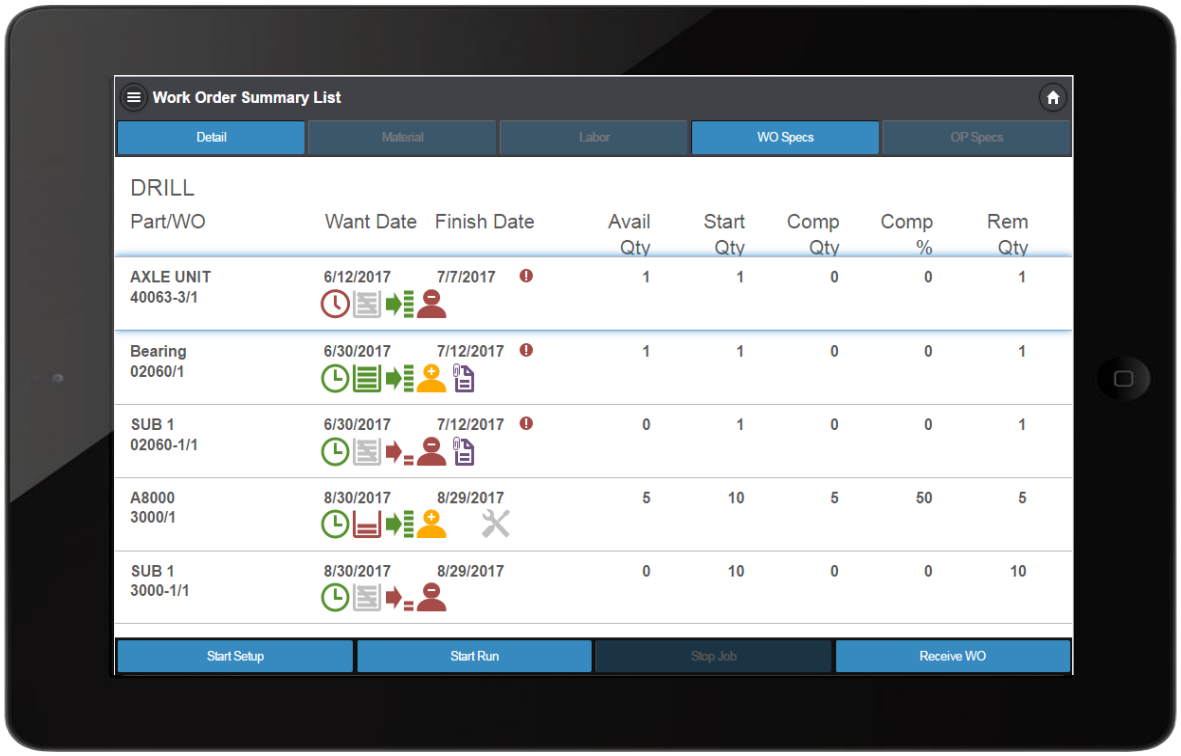
Infor VISUAL Easy Lean is a fast-to-implement solution that provides you protection for your planning and execution processes. It is a scheduling method that delivers significant results within 30-90 days. With a few small changes to your traditional planning methods, such as setting up shipping and inventory buffers, you can gain visibility into your materials and production. This visibility allows you to make better decisions, release inventory at optimal times, and smooth production flow. It helps you avoid chaotic situations on the production floor, take on increased business, and ultimately drive more money to your bottom line.

Whether you operate as a make-to-order or make-to-stock company, Infor VISUAL Easy Lean can protect your on-time deliveries through shorter lead-times and provide the critical information you need to overcome market constraints and increase business and profits. Unlike traditional scheduling solutions, Easy Lean focuses on pulling materials through the shop (Simplified Market Pull), which helps keep your inventory at optimum levels.

By incorporating shipping and inventory buffers into scheduling, you can protect both customer due dates and constraint resource schedules, and guard against low and high availability of raw materials, purchased items, common subassemblies, replacement items, and finished goods.

- Protect your ability to deliver on time every time; protect pre-production, production, semi-finished goods, and finished goods.
- Manage market constraints and increase your ability to compete in the global marketplace.
- Gain visibility into your materials and production, allowing you to make more profitable decisions.
- Respond to the market quickly.
- Reduce on-hand inventory and shorten lead-times.
- Keep flow throughout production and stay efficient with lean business processes.
- Avoid stock-outs and misappropriation of goods.
- Quote shorter lead-times with supreme confidence and go after sales opportunities requiring aggressive deliveries.

Mobile Scheduling Dispatch

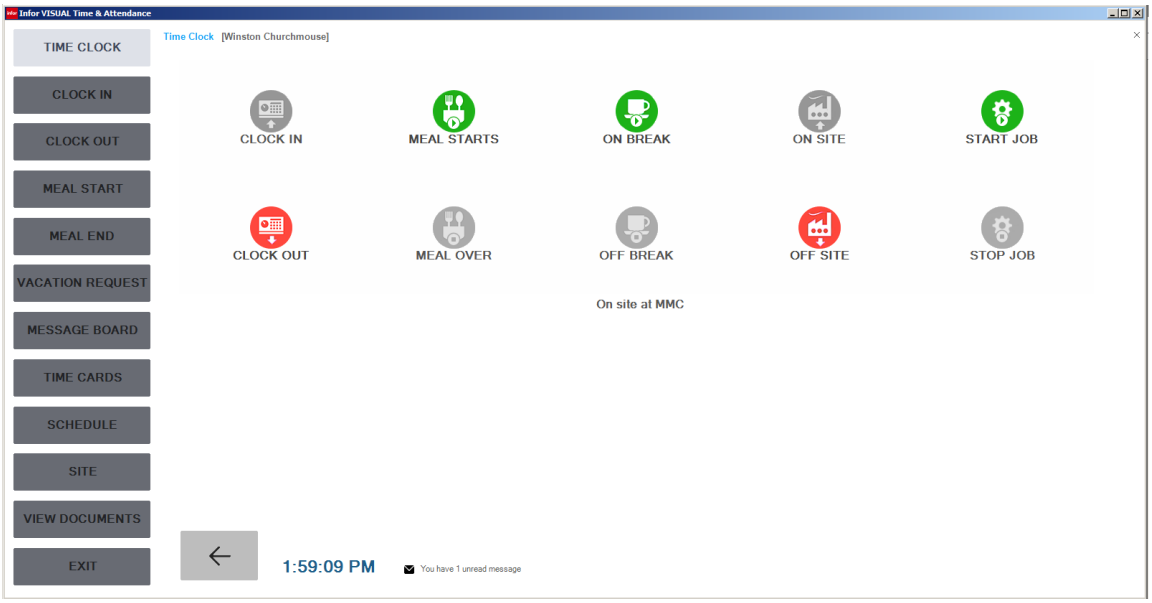


With mobile dispatch your entire operation knows what to work on next and if all materials, tools, and fixtures are available to complete the operation.

With VISUAL's mobile scheduling dispatch feature you have direct access to all actives on the shop floor. Production foreman have a real-time view into available capacity, backlog, and status of individual work orders or resources. Machine operators know what to work on next as determined by the VISUAL Scheduler, and where to locate the material to begin the job.

- Setup status boards around the plant showing current workload within that work cell.
- Use displays at a machine or resource to indicate what to work on next.
- Check on the status of a work order remotely from a mobile device.
- Remotely identify available capacity at a resource, resource group, or product line operation to determine potential delivery of a new order.
- Determine where in the shop to find the material required to begin an operation.
- View the planned delivery date of incoming purchase orders that are needed to start or complete a customer's order.
- View all drawings and attachments associated with a work order.
- Drill to all labor, material, service receipts, and receipts to finished goods associated with a work order.

VISUAL Time & Attendance



Use VISUAL Time & Attendance to track your employees' time, whether they are hourly workers, pieceworkers, exempt employees, or non-exempt employees.

With Infor VISUAL Time & Attendance you can track employee attendance, manual time sheets, and manufacturing labor. Configure each shop floor Kiosk to accept any or all types of tracked transactions. User definable compensation rules allow for flexible work cycle and pay calendar definitions, multi-level premium rules, and shift differentials, among others. Infor VISUAL Time & Attendance fully supports both piecework and incentive pay.

Infor VISUAL Time & Attendance uses the compensation rules when calculating earnings, and exports the data to multiple third-party payroll processors.

You can track information for all types of employees: hourly workers, pieceworkers, and both exempt and non-exempt salaried employees. You can set up employees to report their time with timesheets instead of the Infor VISUAL Time & Attendance Kiosk clocking functionality.

You can set up electronic time approval and electronic signature capabilities for your supervisors so that time is approved before employee earnings are calculated.

- Create extensive audit trails and employee information histories when changes are made to timesheets.
- Take advantage of paperless manufacturing labor data via Kiosks and mobile devices.
- Define holiday and payroll frequency calendars, along with paid or unpaid breaks and meals.
- Generate standard work schedules based on shift definition parameters with auto-updates
- Apply message trigger options to alert users to specific events or milestones.
- Synchronize your Infor VISUAL systems data to reduce redundant data entry.
- Enable total time accounting to comply with DCAA collection methods.
- Define different clock in and clock out rounding rules with the ability to override actual times with the scheduled time if needed.
- Assign employees to multiple user-defined groupings to enhance report filtering.

Material & Labor Barcode Transaction System (BTS)

For timely and accurate reporting of material and labor activity on the shop floor, you can deploy the optional VISUAL Radio Frequency (RF) Barcode Tracking System (BTS) for harsh environments, or the Smart Device solution extension for less rigorous environments.

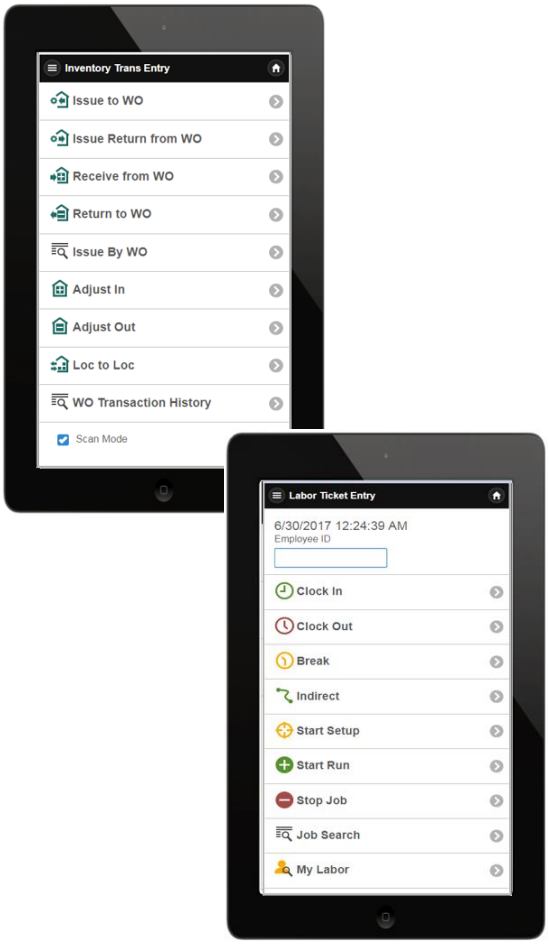
With BTS you can automate your complete material and labor tracking processes, print industry-compliant barcode labels, and eliminate data entry errors.

Infor VISUAL BTS offers three optional modules: Automated Material Tracking, Automated Labor Tracking, and the Labor Kiosk (Wedge) station to help streamline your production workflow. Each offering includes unlimited mobile connections for material or labor when a minimum BTS or Labor Kiosk seat count is reached.

A label print utility, which seamlessly integrates Infor VISUAL and Loftware® Print Server, provides barcode label design and printing technology. The utility integrates directly with industry-leading Loftware label design and print software.

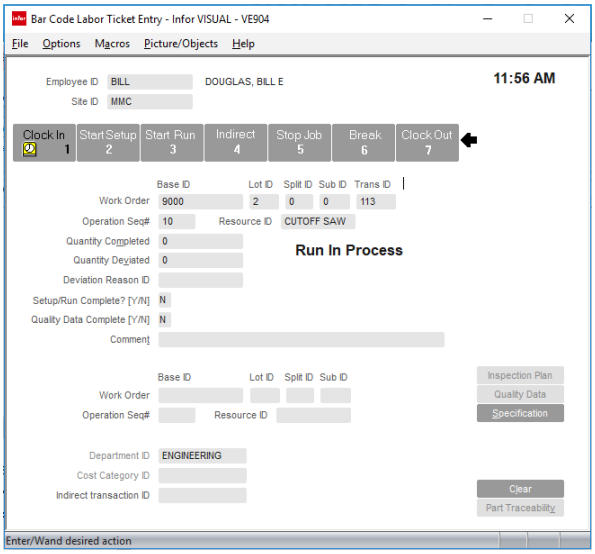
Material Barcoding (BTS)

- Perform PO receipts, as well as issues to/from work orders.
- Track and ship inventory in a timely and cost effective manner.
- Perform physical inventory counts more quickly, easily, and accurately.
- Optimize warehouse operations by keeping inventory flowing smoothly between locations.
- Print barcode labels from any of the industry-standard barcode thermal printers.
- Ensure inventory accuracy.
- Improve customer service and decision making with real-time information about inventory and locations.
- Issue material to the work order, perform inventory adjustments and transfers, and receive work orders to stock using mobile devices.



Easily transact work order material and labor on the shop floor using VISUAL BTS on RF handheld devices, or on smart device using the mobile extension.

Labor Barcoding (BTS)



When a full screen labor Kiosk is required, deploy VISUAL's wedge barcode solution.

- Report labor to the work order to capture accurate cost details.
- Automatically update the projected hours remaining on on work orders for up-to-date job status and scheduling accuracies.
- Report Serial Number and Lot Control information as part of the build process.
- Enter deviation quantities with reason for deviations.
- Move work to another resource to capitalize on open capacity to improve efficiencies.
- View work order prints, drawings, and attachments. (mobile)

Labor Kiosk (Wedge)

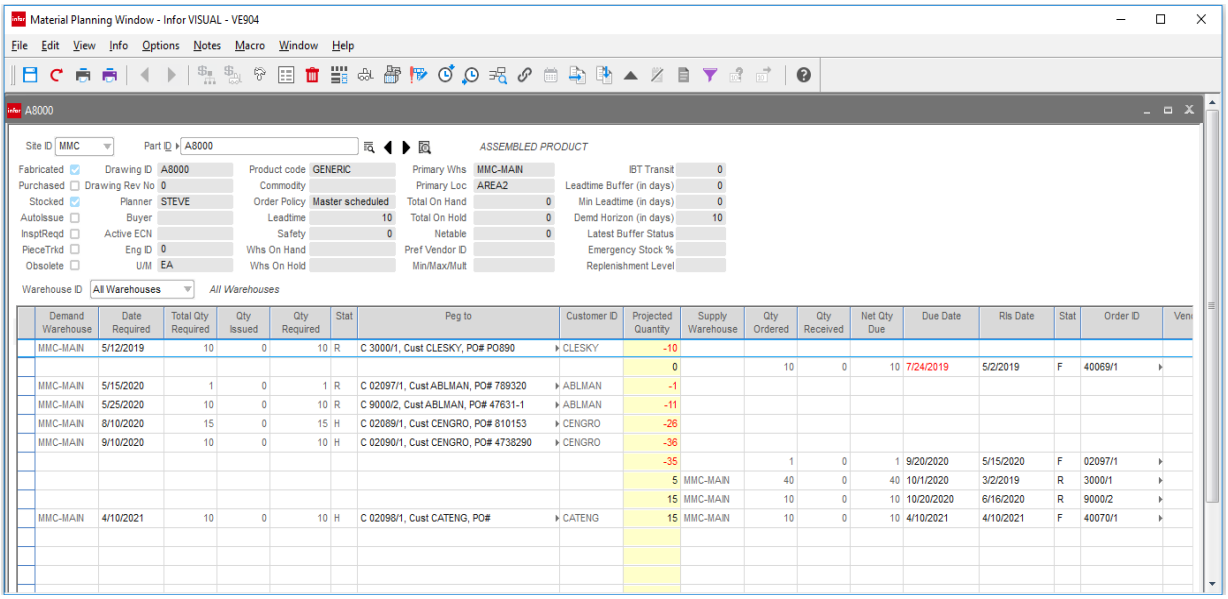
For companies requiring the flexibility of a full screen PC, Infor VISUAL offers the stationary Wedge Labor Kiosk for extended labor functionality.

- Enter data quickly and accurately using barcode or QCode scanners.
- Choose between single and multiple job modes, and define either a time or cost basis for prorating multiple jobs.
- Create on-screen macros to perform company specific call-outs or updates.
- Enter required quality measurements when used with Infor Quality Management.
- Call up associated work order prints, drawings, or attachments.

Employees can use VISUAL's Mobile device extension for easy reporting of labor to the work order.

Material Planning

Master Scheduling & MRP



Use VISUAL's Material Requirements Planning features to ensure you have the items you need to meet customer demand. Material Planning Window provides a 360-degree view into an item demand and supply netting.

Manage the balance between supply and demand with the Material Requirements Planning (MRP) module. The MRP module provides a comprehensive analysis of your material situation, including the suggested action to restore balance. It suggests when to release supply orders (for either purchased or fabricated items), based on the most up-to-date supply and demand information available. MRP helps reduce inventory, increase manufacturing productivity, and ultimately facilitates cash flow.

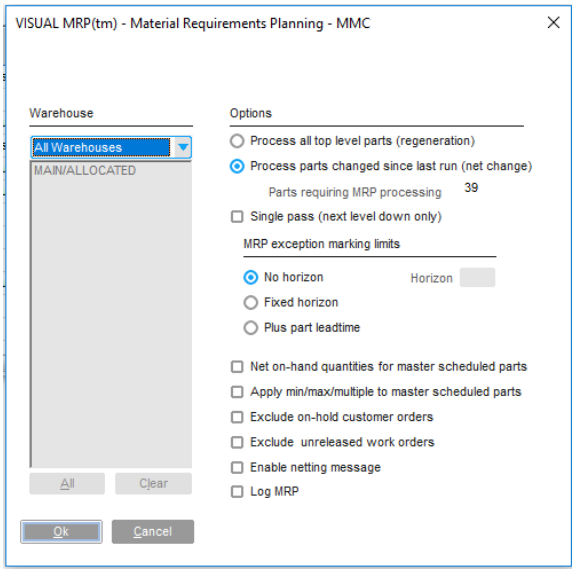
Working with MRP, the Master Production Schedule (MPS) module translates your business plan, including your forecasted demand, into a production plan using firm planned orders in a true multi-level, optional component scheduling environment. With MPS driving the manufacturing process, you can avoid shortages, costly expediting, last minute rescheduling, and inefficient allocation of resources.

- Integrate forecasts, master schedule items, sales orders, and firm-planned orders for MRP processing.
- Choose between various planning policy options including discrete, minimum/maximum order quantity, fixed period, period supply, etc.
- Explode all assembly schedules into component requirements and choose between including or excluding firmed, released, unreleased, closed, or canceled requirements.
- Review and implement rescheduling recommendations for work orders and purchase orders based on actual production and demand schedules by severity exceptions.
- Choose regenerative processing or net change for level-by-level processing.
- Peg MRP planned orders to the next and top-level assemblies.
- Generate material reports with options for netting methods, various sort orders, and other filtering options.
- Generate MRP by independent warehouses; view supply and demand separately in these warehouses.
- Consolidate planned items within the Master Production Schedule.

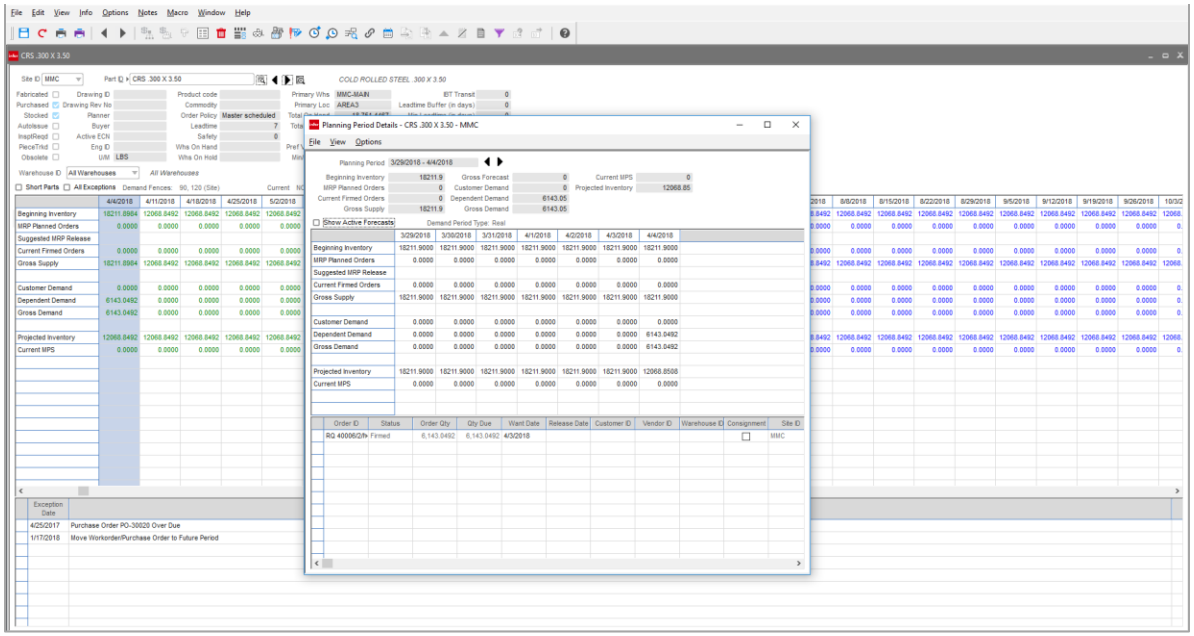
- Produce master schedules and forecasts for any level in the Bill of Material for any kind of item.

- Maintain separate forecasts by customer.

- Visualize everything you need to know – in one place. The Material Planning Window gives you visibility into both Purchasing and Production plans.



Advanced Material Planning



Use VISUAL's Advanced Material Planning toolset to create planning calendars with projected need within each planning timeframe with drill-down to daily inventory positioning within the planning timeframe.

The Infor VISUAL Advanced Material Planning module helps you manage material requirements by showing summarized Supply, Demand and Forecast information. Summarized information is shown in buckets of time that you define – anywhere from 1 day to 1 year. Because the data is summarized, you can plan for the big picture without the need to manually read and analyze all the details. But when you need the details, they are just one click away.

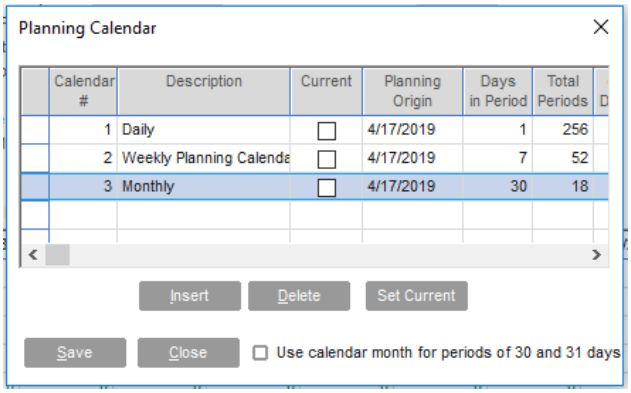
You can add color-coding to demand fences that you set up. You will know at-a-glance if the demand is real, forecasted or a combination of both. Multiple forecasts can be managed and displayed providing additional insight in the planning process.

Originally designed to accommodate the needs of make-to-stock and repetitive manufacturers, the Advanced Material Planning window provides practical functionality for the make-to-order manufacturer with the bulk release of planned materials. These planned materials, whether for production or purchase, can be consolidated or further delineated in released orders.

- Facilitate intelligent planning, viewing, and managing of items with multiple Planning Calendars (i.e., daily, weekly, monthly, etc.) and multiple warehouses.
- Drill down to view item details for customer orders, work orders, purchase orders, and planned orders while viewing summary information by time period.
- Drill down to the daily inventory positioning for a precise view into demand and supply netting.
- Master schedule planned items from the Master Production Schedule window, including manipulation/consolidation of customer forecast data.
- Be alerted to exception conditions and view system-recommended remedial actions.
- Firm multiple planned orders for a variety of items for a specified date range.
- Define Planning Bills of Material that include sub-assemblies for real or planned items.
- Create alternate Master Production Schedule scenarios via Planning Forecasts.

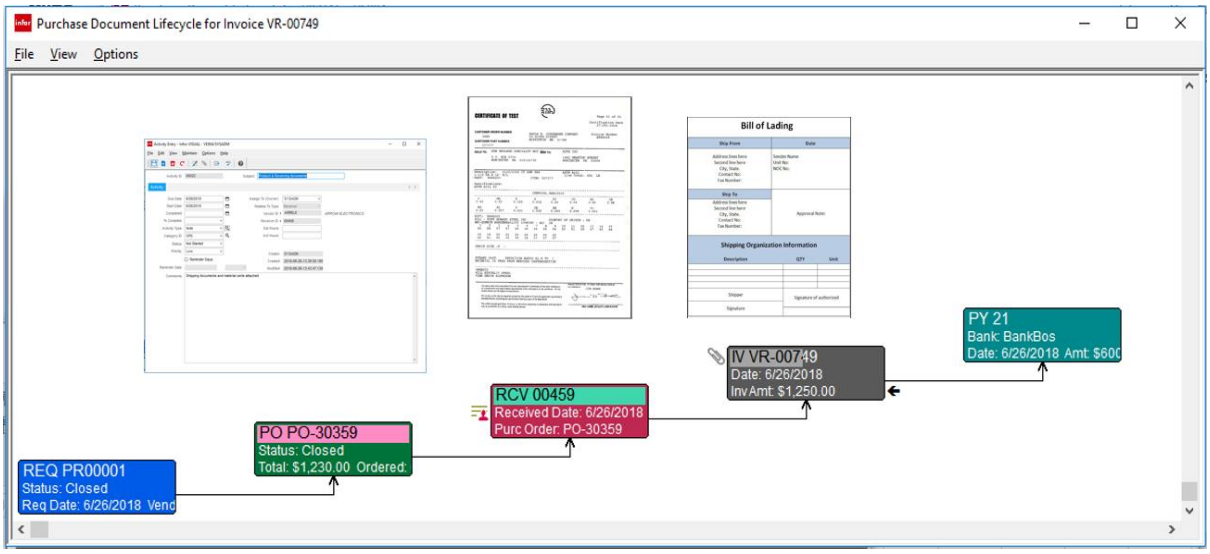
- Identify multi-level item relationships and specify the percentage of each subordinate item to the parent.

- Generate MRP by independent warehouses; view supply and demand separately in these warehouses.



Supply Chain & Inventory Management

Request for Quote to Payment



Visually determine where an item is in the supply chain. Has it been ordered, received, in transit, issued to the work order, or paid?

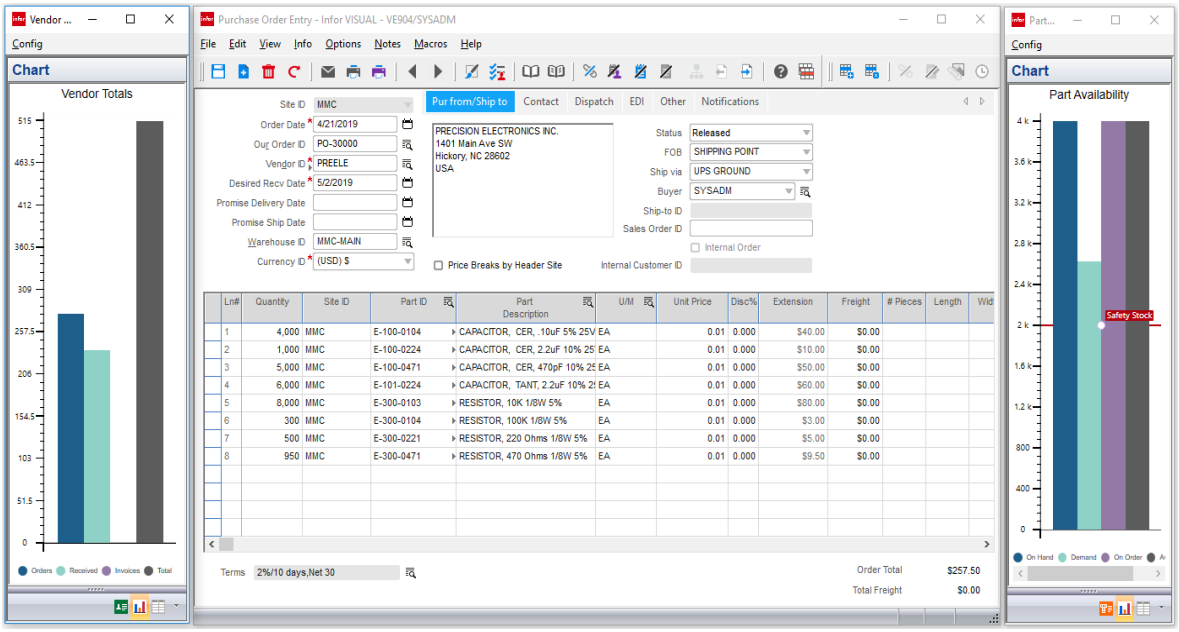
The Infor VISUAL document lifecycle provides a graphical view of the supply side, with complete drill-through functionality to all related documents. Users can add attachments, copy in emails, record comments, and schedule follow-ups or reminders associated with a document or previous activity. You can automatically send notifications to internal and external stakeholders when an event occurs. For example, a shop floor supervisor can be notified when a critical material for a job is scanned in at the receiving dock.

From any document within the supply chain a user can “click-through’ the entire lifecycle, including drilling directly into the work order requiring the material.

No more jumping from menu to menu to get answers. With Infor VISUAL the relationship of the documents is graphically depicted with an easy point-and-click to all levels of detail, improving efficiencies across the organization.

Infor VISUAL’s core feature set includes request for quotation through to cash disbursements, with approvals and three-way matching rules to prevent errors and enforce accounting control points. Companies can also determine what document data elements that want to audit for changes, indicating who change what and when.

Purchase Management



VISUAL's Purchase Order Entry window handles all types of purchases: inventoried items, supply items, outside service operations pertaining to a manufacturing order, and subcontracted items that require sending components to the vendor.

Maintain control of inventory, enhance your cash flow, and shorten delivery times with Infor VISUAL's purchasing module. Infor VISUAL helps you to easily coordinate material purchases by providing online decision support that simplifies record keeping. Use Infor VISUAL to handle all types of purchases, including inventoried items, supply items, outside service operations pertaining to a manufacturing order, and subcontracted items that require you to send components to the vendor. Drop shipments can include specific locations other than the primary ship-to address, such as various warehouses or customer locations.

Infor VISUAL's purchasing module provides standard form reports such as purchase orders, acknowledgments, and order lists for purchasing personnel, as well as analytical accounts payable related reports, including purchase order lists and accrual reports.

- Enter purchase orders, order receipts, and returns in real-time and let Infor VISUAL automatically calculate the adjustments to POs.
- Purchase one-time materials directly to a job without having to assign internal item numbers.
- Link a PO line item to a specific job requiring that item for complete visibility and flow-through of all related costs to the job.
- Automatically issue material pegged to a specific job, eliminating double entries.
- Specify multiple item lines on a PO, each having its own multi-line delivery schedule for time-phased delivery based on production schedules.
- Establish approved vendor lists for each item, including quantity discounts, lead-times, and the vendor's and/or manufacturer's item number for cross-referencing.

- Generate vendor RFQs (Request for Quote) that can be easily converted to a Purchase Order.

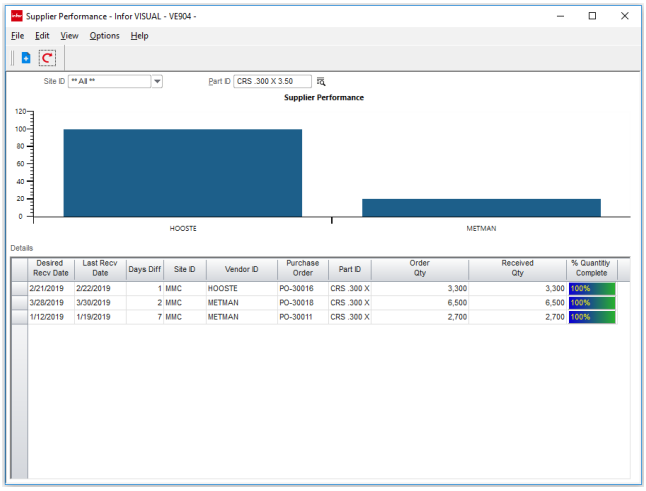
- Create vendor purchase requisitions, with routing through approval processes with point-and-click purchase order creation from approved requisitions.

- Use standard reports and on-screen views to review all requirements not covered by purchasing; compare on-hand, on order, and allocated levels at a glance; and view suggested purchase dates by item, product, or commodity.

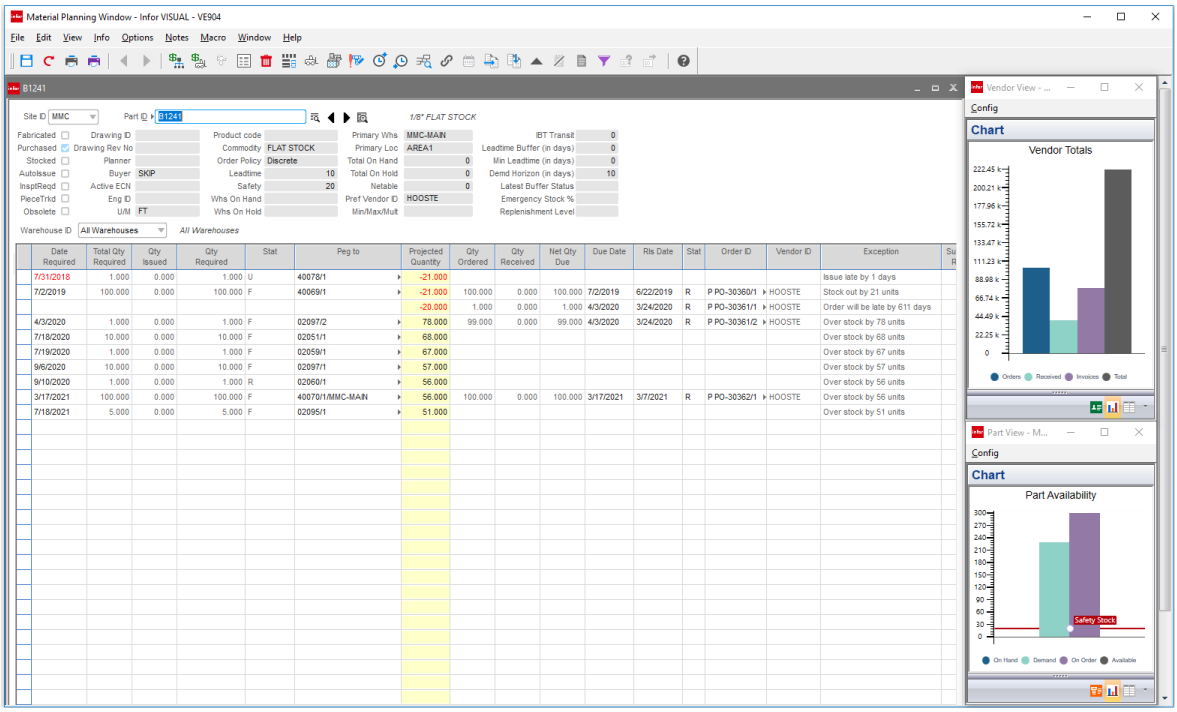
- Automate purchase accruals for product received but not yet invoiced.

- Maintain Blanket Purchase Orders, supporting multiple delivery schedules and shipping addresses.

- Easily view vendor and item history, including last price paid, previous suppliers, and delivery performance.



Inventory Management



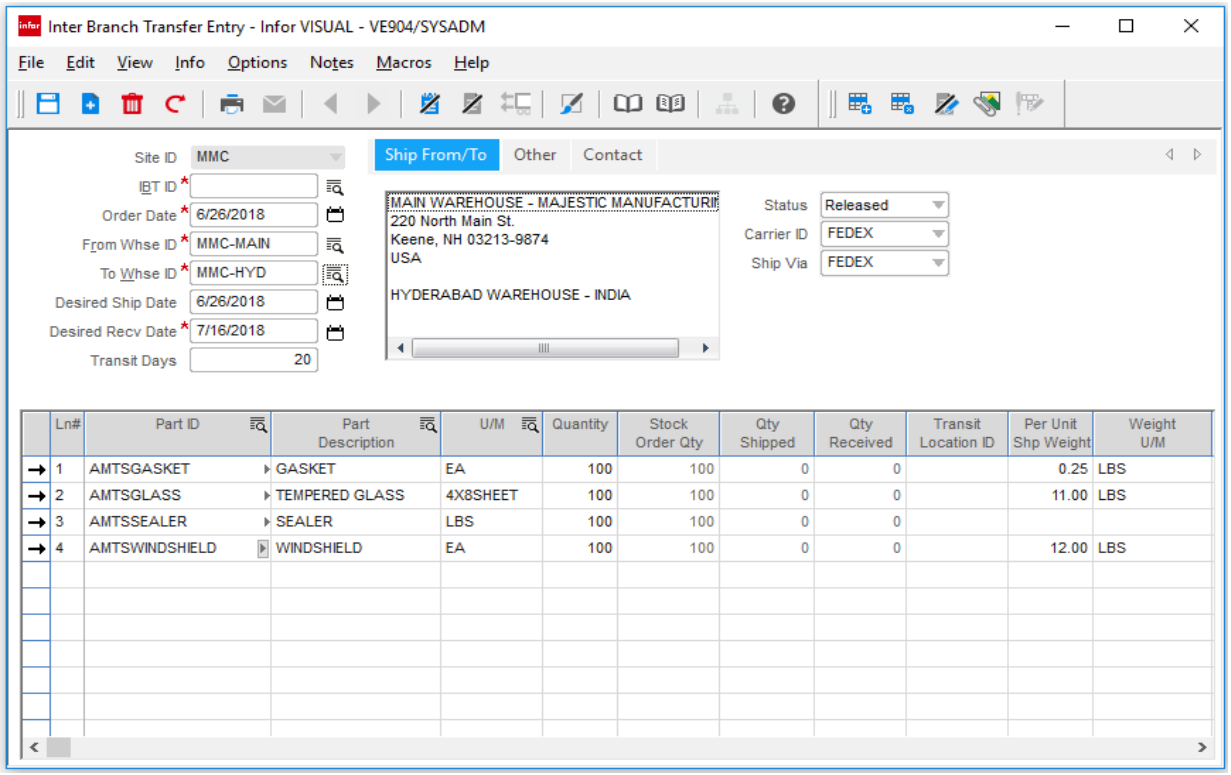
Use the Material Planning window to perform in-depth, time-phased, netting evaluations of your complete supply and demand situation for your items.

Take control over your inventory with Infor VISUAL. You can easily access accurate, up-to-date information about your inventory throughout your company. Infor VISUAL automates the process of tracking items by adjusting inventory whenever you create a transaction involving an item.

Inventory items can be designated as purchased, manufactured, stocked, or non-stocked so that you can immediately place a purchase order or issue a job order when an item is in demand. Infor VISUAL also allows you to easily track material and costs on a per-job basis. The Material Planning window provides an online, in-depth, time-phased, netting evaluation of your complete supply and demand timeline across all items and warehouses. The extensive on-screen visuals and reporting capabilities of Infor VISUAL provide complete profiles of any item in the system.

- Assign comprehensive item definitions including variable length item numbers up to 30 characters long, extended item descriptions, user definable fields, and supplier information.
- Stock goods in one unit of measure while purchasing, selling, and/or consuming on a work order in another unit of measure.
- Assign multiple warehouse locations for an item and/or multiple locations within a single warehouse.
- Easily transfer items between locations or warehouses.
- Automatically issue materials by work order, operation set, resource, or sub-assembly.
- Consume floor stock items automatically as steps are completed.
- Set up specialized item pricing such as quantity and discounted pricing, contract pricing, etc., for both purchasing and selling.
- Perform automated physical inventories, cycle counting, and ABC analysis.
- Capture costs at actual, standard, FIFO, LIFO either by part or part location.

Interbranch Transfers

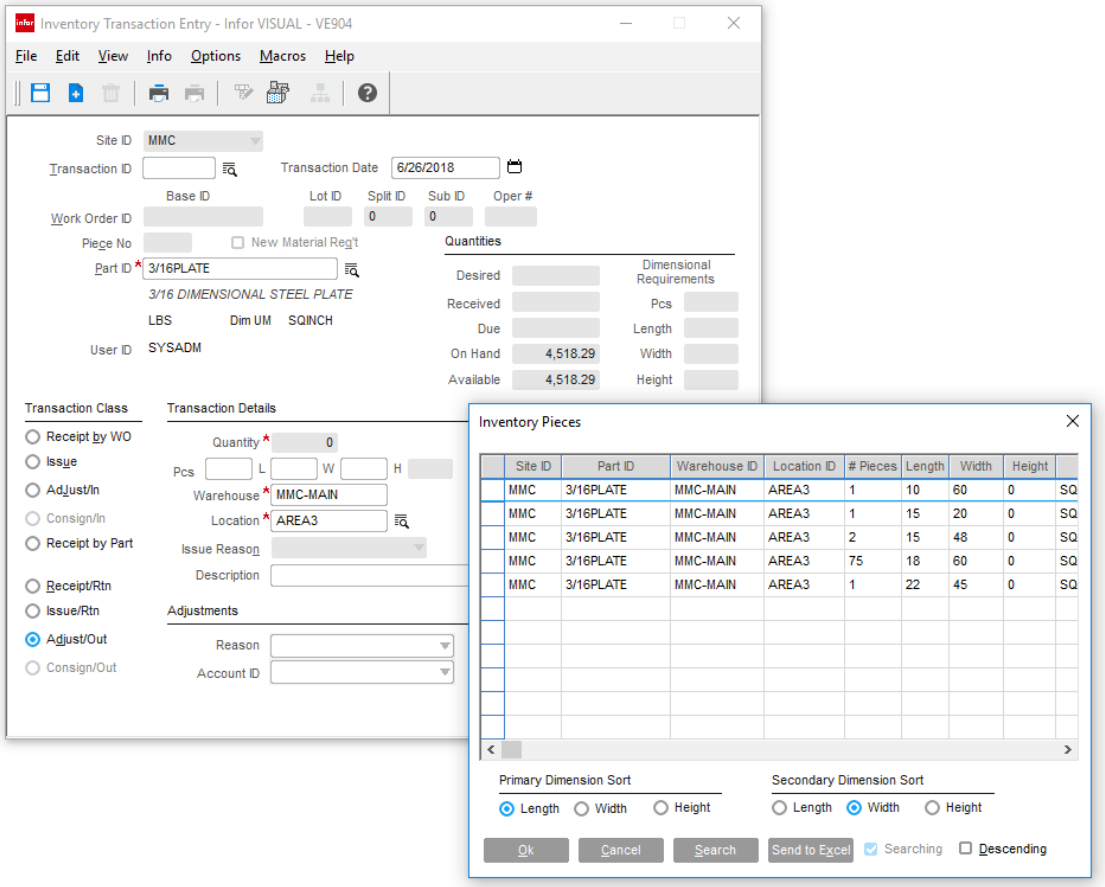


Use VISUAL's Interbranch Transfer feature to accurately track the movement of item quantities between warehouses.

Use Infor VISUAL's Interbranch Transfers (IBT) to accurately track the movement of item quantities between warehouses. IBTs have their own shipping documents that include detailed shipping information. You can assign supply to outgoing IBTs and demand from incoming IBT lines, and ship and receive IBT quantities.

- Enter detailed shipping information.
- Assign supply to outgoing IBTs and demand from incoming IBT lines.
- Track inventory between warehouses.
- Receive up-to-the-second information about items and quantities.
- Enter, ship, and receive transfers quickly and easily.
- View and control IBTs in the Material Planning window.

Dimensional Inventory Tracking



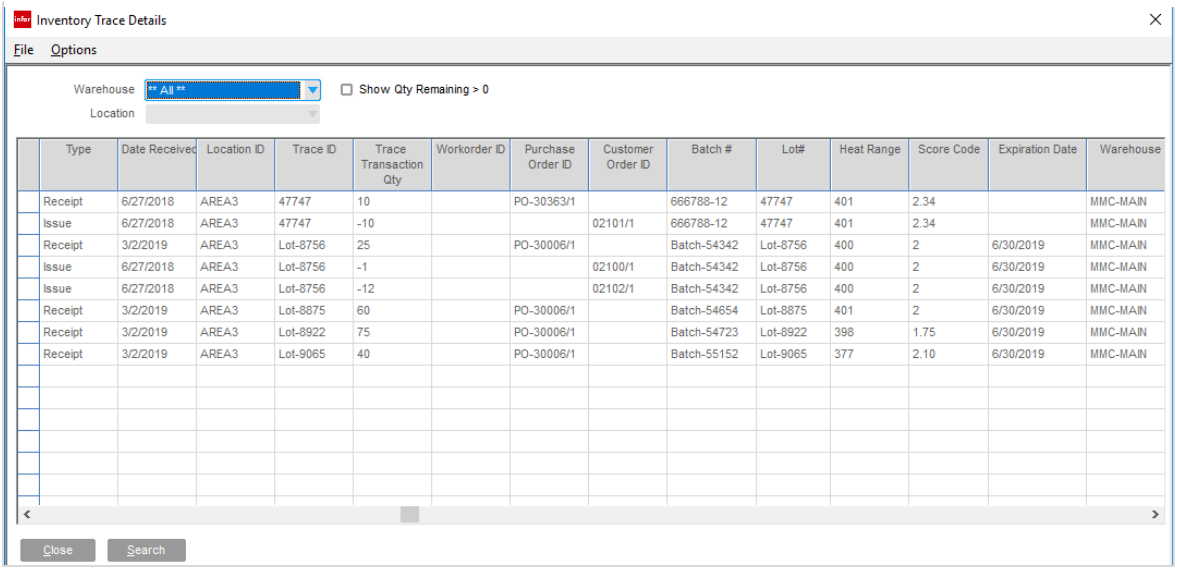
Use VISUAL's Dimension Inventory Tracking features to view your inventory by height, weight, and other dimension characteristics.

Infor VISUAL's Dimensional Inventory Tracking feature provides you with an added level of control over your inventoried items. Instead of simply seeing the total inventory quantity and stocking unit of measure, you have a view into the dimensional characteristics of the item. You can issue a specified number of pieces by dimension and then let the system make the necessary conversions to issue the correct total order quantity.

Using Dimensional Inventory Tracking, any transaction involving an item causes all associated values to be immediately adjusted. You can purchase, receive, and enter a material requirement simply by entering the number of pieces of material, the required dimensions, and the warehouse location. Dimensional Inventory Tracking can also perform a physical inventory when you specify the number of pieces and dimensions of those pieces.

- Define up to three dimensions and an unlimited number of dimensional records for each item.
- Specify Unit of Measure conversions for materials.
- Calculate purchase costs automatically.
- Issue/return from WIP as well as adjust in/out for drop management.
- Receive partial pieces that differ in size than those listed on the originating purchase order.
- Track inventory by location of pieces within the plant for managing drops.
- Take a full physical inventory by specifying the number of pieces and their dimensions.

Lot & Serial Traceability



Type	Date Received	Location ID	Trace ID	Trace Transaction Qty	Workorder ID	Purchase Order ID	Customer Order ID	Batch #	Lot#	Heat Range	Score Code	Expiration Date	Warehouse
Receipt	6/27/2018	AREA3	47747	10		PO-30363/1		666788-12	47747	401	2.34		MMC-MAIN
Issue	6/27/2018	AREA3	47747	-10			02101/1	666788-12	47747	401	2.34		MMC-MAIN
Receipt	3/2/2019	AREA3	Lot-8756	25		PO-30006/1		Batch-54342	Lot-8756	400	2	6/30/2019	MMC-MAIN
Issue	6/27/2018	AREA3	Lot-8756	-1			02100/1	Batch-54342	Lot-8756	400	2	6/30/2019	MMC-MAIN
Issue	6/27/2018	AREA3	Lot-8756	-12			02102/1	Batch-54342	Lot-8756	400	2	6/30/2019	MMC-MAIN
Receipt	3/2/2019	AREA3	Lot-8875	60		PO-30006/1		Batch-54654	Lot-8875	401	2	6/30/2019	MMC-MAIN
Receipt	3/2/2019	AREA3	Lot-8922	75		PO-30006/1		Batch-54723	Lot-8922	398	1.75	6/30/2019	MMC-MAIN
Receipt	3/2/2019	AREA3	Lot-9065	40		PO-30006/1		Batch-55152	Lot-9065	377	2.10	6/30/2019	MMC-MAIN

Use VISUAL's Lot and Traceability feature to track items from receipt of materials from the vendor through delivery to the customer.

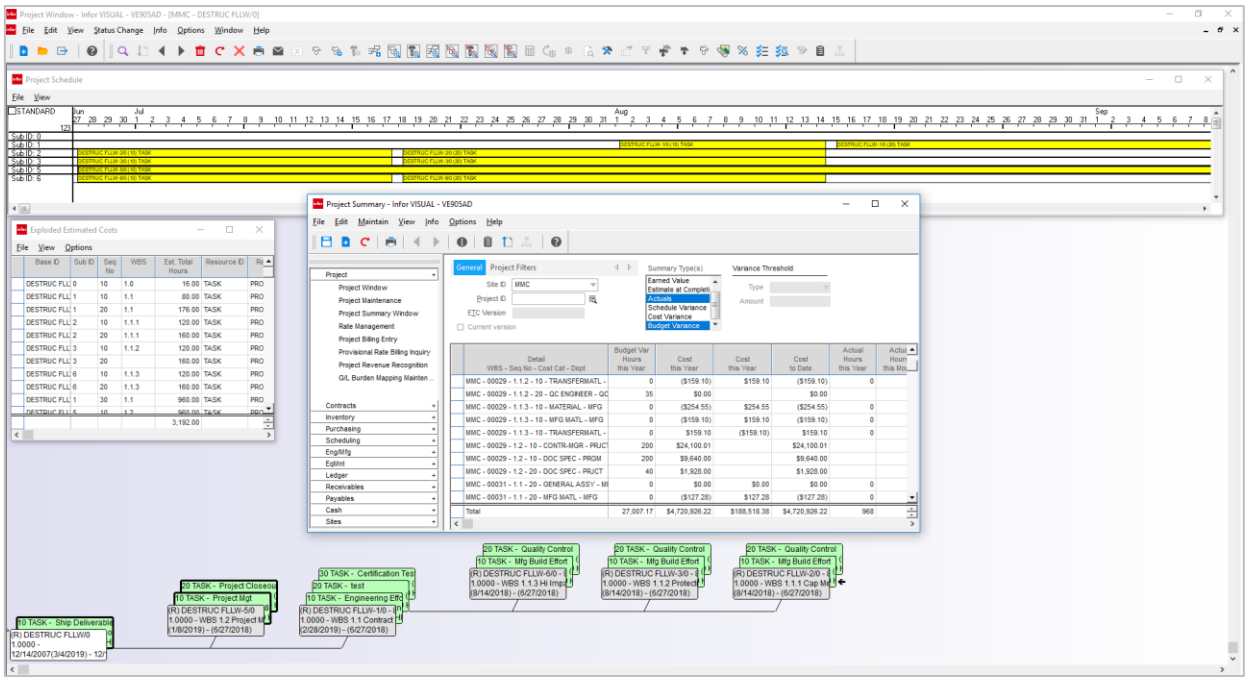
Infor VISUAL Lot & Serial Traceability feature is designed for manufacturers who require more stringent control over product tracking. Lot & Serial Traceability provides this control by establishing trace profiles for each lot number, serial number, or other grouping of an item, and by automatically tracking each item as it flows through your plant. You can assign additional information including a description, expiration date, and other user-definable attributes required by your organization or customers.

Lot & Serial Traceability tracks the item from cradle to grave, from receipt of materials from your supplier through delivery of the product to the customer, as well as all intermediate levels. As jobs move through the plant, operators can be prompted for additional information when consuming material or completing operations. You can use inquiry capabilities to review the flow of material lots and serialized items as they move through the manufacturing process.

- Customize item traceability requirements and specify special tracking requirements by item.
- Assign alphabetic and numeric properties to trace items.
- Assign lot numbers for purchased materials at receipt or for finished products coming from the shop floor.
- Track raw material lot numbers.
- Use the description, expiration date, and user-defined fields to track information for each lot.
- Assign serial numbers to finished products and components used within a Bill of Material.
- Trace a customer shipment back to the raw material lot or serial numbers used to produce the finished item--cradle to grave traceability.
- Perform online inquiries by item for lot numbers and serial numbers received or shipped as well as inventory balances.

VISUAL Project Management

VISUAL Project Core



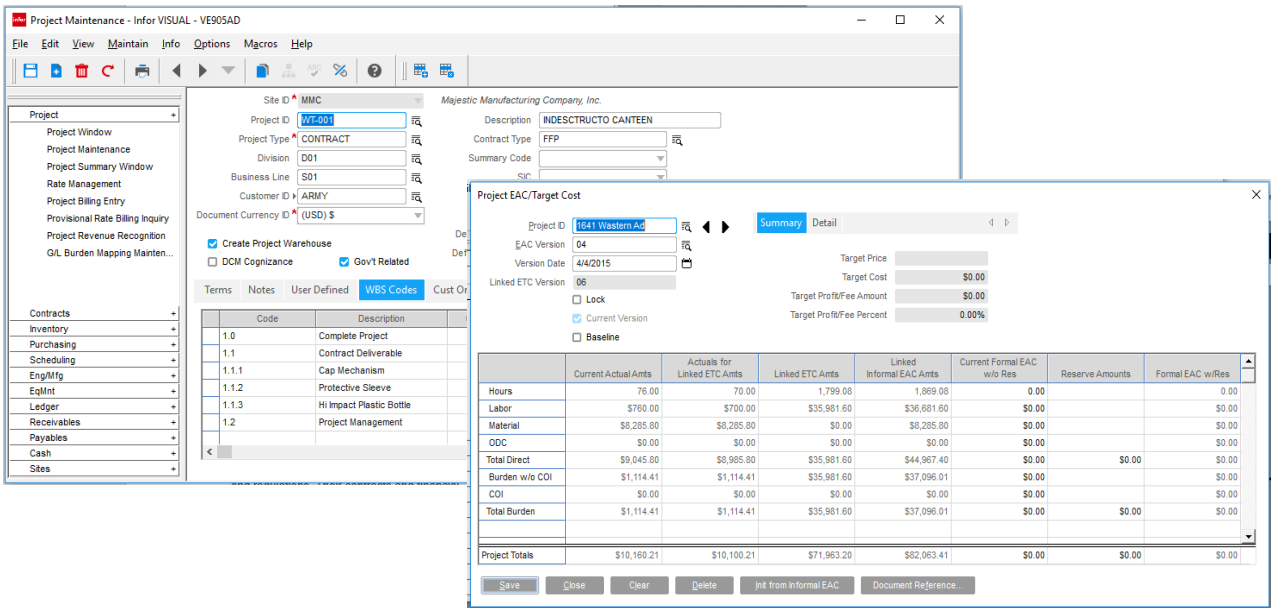
Use VISUAL Project to consolidate multiple enterprise wide activities and work orders into a single control point to capture costs and manage overall deliverable.

Your project-oriented customers need complex goods built to specification and delivered within budget. Your project managers need real-time integrated tools to track revenues, expenses, and profitability. VISUAL Project automates workflow, increases efficiency, and, most importantly, promotes customer satisfaction. VISUAL project helps facilitates teamwork and encourages the exchange of information.

Infor VISUAL Project helps you control project lifecycles with tools for:

- Separate Request for Proposal capabilities with specific project references for each estimate.
- Multiple Project Billing/Invoicing Methods, such as Milestone, Shipment, Progress, and Time and Materials.
- Project Budgeting and Costing by Work Breakdown Structure, allowing time phased comparison and variance reporting.
- Project Inventory Management, including MRP by Project, Commingling Options, Virtual Project Warehouses, and Customer-Owned Material Control.
- Project Profitability Tracking by Project and/or Business Line.
- Bi-directional integration with Microsoft Project.
- Project scheduling capabilities with visibility to linked Production Orders.

VISUAL Project – Aerospace & Defense



Project Aerospace and Defense features support complex contract tracking, audit, and reporting requirements.

Infor VISUAL Aerospace & Defense (A&D) solution expands the VISUAL Project functionality in Infor VISUAL with additional contract and reporting features for the Aerospace & Defense industry.

A&D customers have complex requirements and regulations. Their contracts and financial managers need real-time integrated tools to track revenues, expenses, and contract compliance requirements. VISUAL A&D automates procedures, increases visibility, and most importantly, promotes customer satisfaction. This solution facilitates teamwork and information reporting.

Infor VISUAL A&D helps you control contracts, project lifecycles, and financial reporting with tools for:

- Project/Contract Administration, including flowing down of terms and conditions.
- Separate Request for Proposal capabilities with specific project references for each estimate.
- Multiple Project Billing/Invoicing Methods, such as Milestone, Shipment, Progress, and Time and Materials.
- Multiple Project Revenue Recognition Methods, such as Cost Plus Earned Fee, Shipment, Percentage of Completion, and Milestone, including multi-currency capabilities.
- Managing and controlling Complex Overhead Rates, including multi-year rates, waterfall burdening, and retroactive rate adjustment capability.
- Project Costing by Work Breakdown Structure, including Earned Value Reporting.
- Project Funds Tracking.
- Bi-directional integration with Microsoft® Project.
- Accounting Records compliant with DCAA, FAR and CAS.

Infor Quality Management

Infor Quality Management helps address all your quality needs, from incoming, in process, and outgoing product, to devices used and skill set of employees. Eliminate having to go through another painful audit by implementing IQM.

Increasing productivity while maintaining and improving quality is one of the primary goals for every manufacturer. When you have effective systems and processes in place, quality and productivity don't have to be competing goals—each can reinforce the other in your efforts to improve long term results. Infor Quality Management brings control, consistency, and predictability to your product lifecycle and supply management activities, so you can bring products to market faster, with superior quality performance.

Leverage experience

Establish, track, and manage every engineering activity and supply chain expectation, while supporting business growth and profitability goals with a functionally rich, easy-to-use quality management system that extends and integrates quality performance management across all aspects of your business.

Infor Quality Management provides tools to help you automate associated design, pre-production, production, and post-production activities. Expertly manage business performance and easily collect, control, and analyze quality system data.

Engineering and Product Management:

Advanced Product Quality Planning (APQP) and Production Part Approval Process (PPAP)

Manage engineering processes from concept and design through all phases of product development.

Engineering Project Management

Initiate and drive short- and long-term engineering activities such as new product development, new OEM projects, and other critical activities.

Product Data Management (PDM)

Unite item master information, Bill of Material detail, design characteristics, and key production specifications into one database environment to achieve complete control over products.

Document Management

Centralize the location, change history, and document audits for electronic and physical documents.

Inspection Plans, FMEAs, and Control Plans

Maintain critical product and process specifications with associated equipment, device, inspection, and control charting as defined in Product Data Management and Process Management.

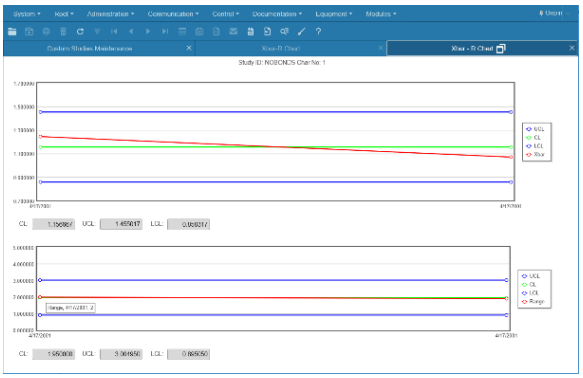
Create inspection plans linked to statistical process control (SPC) for engineering review and evaluation.

Equipment and Tooling Management

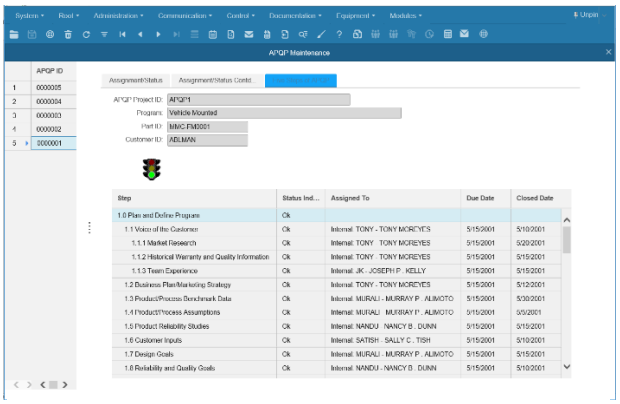
Use tools for preventive and reactive maintenance, including equipment and tooling lists, integrated ERP and Preventive Maintenance scheduling, work order generation, spare part and equipment usage, Preventive Maintenance records, and more.

Calibration and Device Studies

Document, schedule, and track devices and test equipment for calibration.



Use IQM's robust control charts to maintain critical product specifications and analyze test data.



Use IQM to work with teams of your employees, your customers, and your suppliers to establish, track, and manage every engineering activity and supply chain expectation.

Integrated Process Management (IPM)

Identify problems that can positively or negatively impact operations before the product reaches shipping or material review board personnel.

Process Capability & Statistical Process Control (SPC)

Prepare control charts and perform management direction, planning, gage capability, process control and capability analysis, sampling plan preparation, and process detail documentation.

Supply Chain Management:

Customer, Supplier, and Employee Communication

Involve suppliers, customers, and employees through documented and addressed feedback, advanced quality planning, and individual or team training.

Skills, Training, Qualifications, Productivity, and Performance Tracking

Develop, track, inventory, schedule, and perform time-consuming tasks involved in managing human resources.

Skip-lot and Vendor Performance Management

Manage either manual or automated ERP/Regular incoming and ERP/Skiplot inspections for customer-specified and internal receiving requirements.

Automated Preventive Maintenance (PM) Scheduling

Schedule and track all preventive and reactive maintenance.

Nonconformance's (NCM) and Quality Traceability

Detect, assign, and track continuous improvement activities using complete problem-solving details.

Corrective Actions and 8 Discipline (8D) Reports

Manage assignments and performance with the system-wide task manager.

Cost of Quality and Audit Management

Assess and control overall business performance and establish best direction for bottom line improvement.

Task Management Workflow Tools

System-wide Task Management and Enterprise Team Collaboration

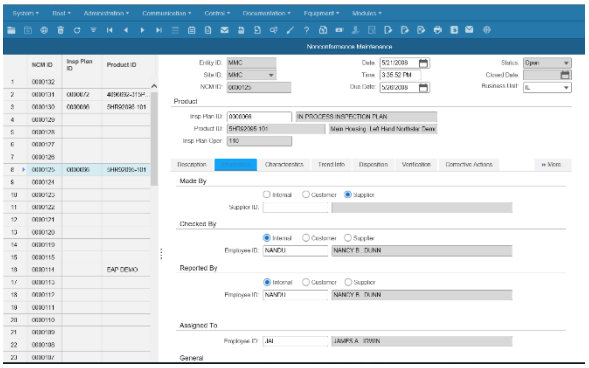
Use the single point-of-reference window, My To Do List, to analyze all activities within the system, access employee work overload conditions, re-assess priorities, and assign additional human resources.

Projects Management

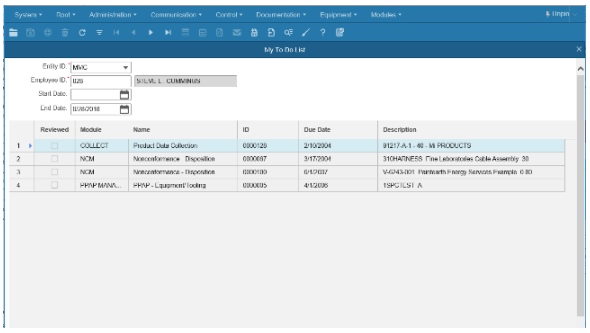
Record, schedule, and track resource usage and project assignment completion.

Multi-Vendor Workflow

Manage your end-to-end business strategy from product conceptualization to multi-site worldwide distribution with the manufacturing business process as the central point.



Use VISUAL Quality Management to continuously improve your products and processes.

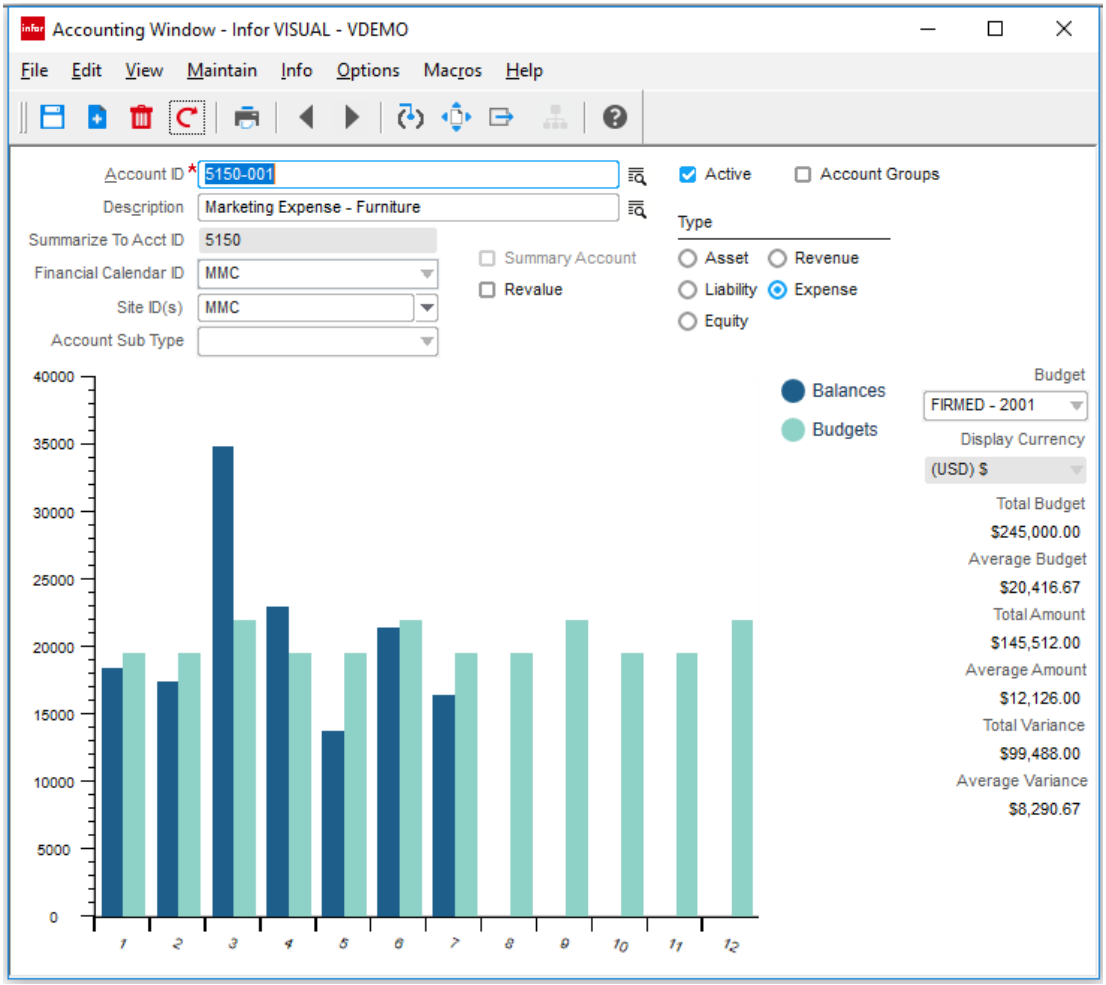


VISUAL Quality Management tracks the tasks assigned to employees so you and your staff can see their to-do lists at-a glance. You can access the modules you need to complete the tasks directly from the to-do list.

Email Integration

Employ email messaging in conjunction with direct database driven notification and activity tracking for individuals inside and outside the company.

Financial Management



Use VISUAL Financials fully integrated, single database, multi-entity multi-site solution to efficiently address all your enterprise's accounting needs.

VISUAL Financials

Infor VISUAL Financials provides a total enterprise solution for your accounting needs. Infor VISUAL Financials helps you compete in the global marketplace by offering multi-currency capabilities and handling consolidation of disparate charts of accounts between subsidiaries as well as differing system currencies. You can automatically create vouchers, generate invoices and credit memos, write checks on-the-fly, create customized reports, and post and create journal entries.

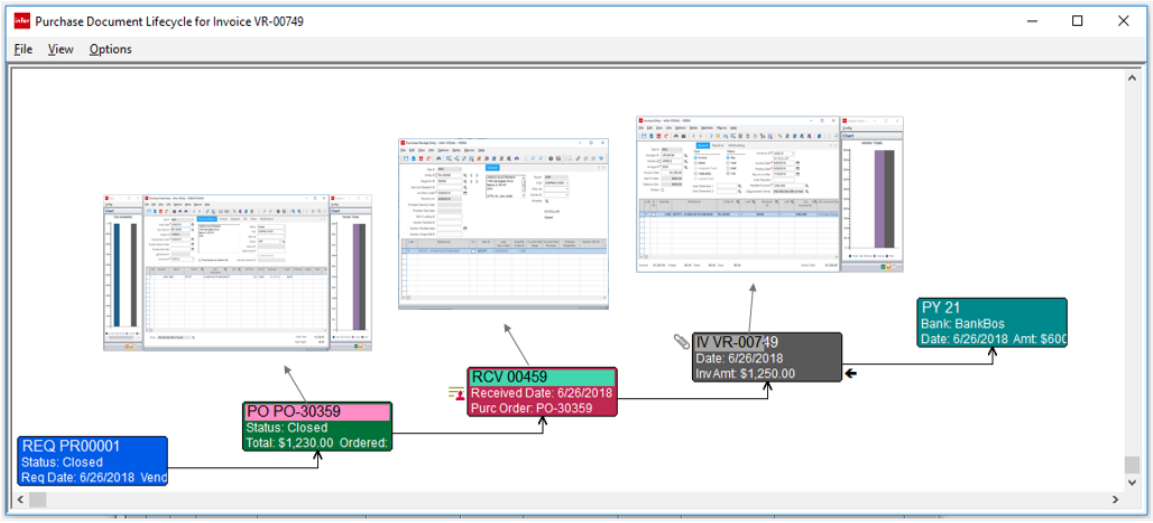
Infor VISUAL Financials includes Accounts Payable, Accounts Receivable, General Ledger, Cash Management, and Cash Book, that are fully integrated with Infor VISUAL ERP, providing a seamless transfer of information with complete drill-down to all levels of detail. Information is accurate and current, and eliminates the need for repetitive data entry. Each of the Infor VISUAL Financials modules is a fully functional system within itself—together they comprise a powerful set of tools for addressing the total accounting needs of your business.

General Ledger

- Define a Chart of Accounts that mirrors your enterprise structure.
- Select from multiple graphical display options to review the G/L, including multi-level drill-down from sub-ledger batch to transaction levels

- Select the G/L reporting calendar method; Monthly, 4-4-5, 13 Period, or a user-defined value.
- Create multiple financial entities for consolidated reporting.
- Take advantage of Infor VISUAL's full multi-currency support.
- Utilize account groups and dimensions to further extend you consolidation and reporting needs.
- Create recurring journals, reversal journals, and rules based allocations.
- Post to multiple fiscal periods (including the future year), subject to definable controls.
- Review financial information by printing standard G/L reports.
- Create customized financial reports with the G/L Report Writer; including alternate G/L structures based on user defined groupings, multi-periods, and budget comparisons.

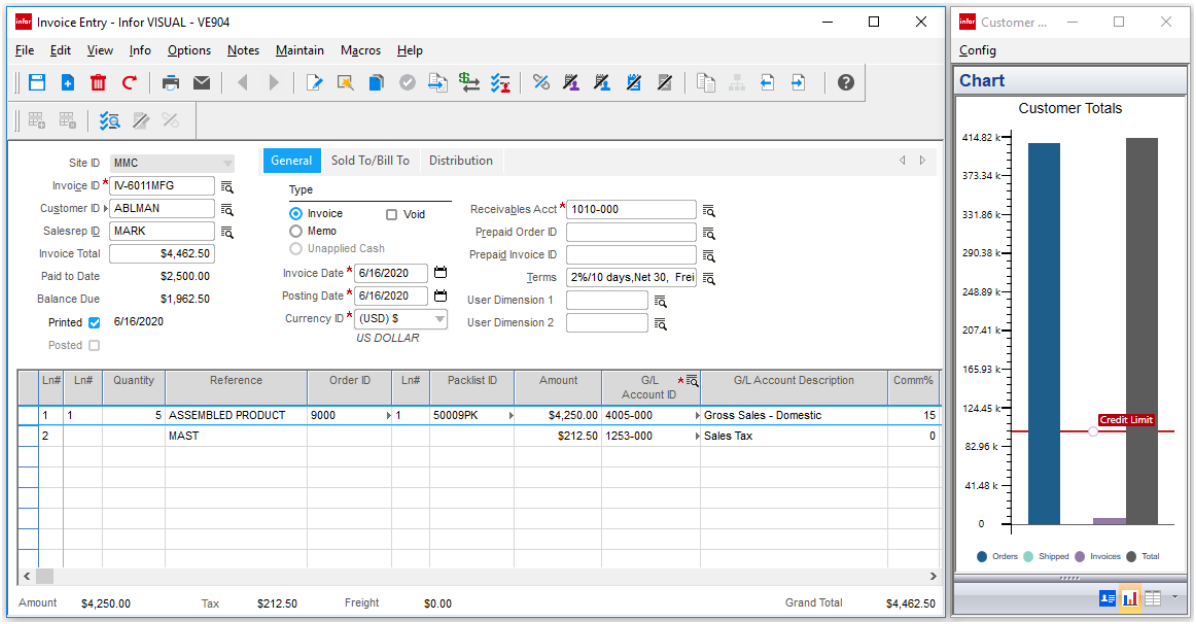
Accounts Payable



With complete visibility of the entire purchase lifecycle, workflow, automated alerts, and three-way matching, VISUAL Accounts Payable ensures cost accuracy and enforces accounting safeguards.

- Implement three way matching with variance safeguards to prevent the saving and posting of invoices with large purchase order out-of-policy variances.
- Create vouchers automatically through POs/receipts matching, including Sub-total and Grand Total amount details.
- Apply credit memos to open vendor invoices.
- Create recurring vouchers and specify the frequency.
- Assign vendor accounts to specific A/P control accounts on the G/L.
- Print vendor checks for invoices scheduled for payment.
- Review extensive A/P information available on standard A/P reports.
- Create individual document postings or summarized postings to the General Ledger for all accounts payable processing.
- Post miscellaneous charges to a work order, such as installation services, shipping services, or other non-material related charges.
- Create and maintain multiple remit-to addresses.
- Allow for a flexible payment schedule negotiated with any of your vendors.
- Write checks on-the-fly in support of immediate payment of invoices.
- Record value-added tax and report duty.
- Track landed costs and freight charges.
- Identify and drill-down to payment history in a variety of ways, including Vendor Inquiry and Document Lifecycle views.

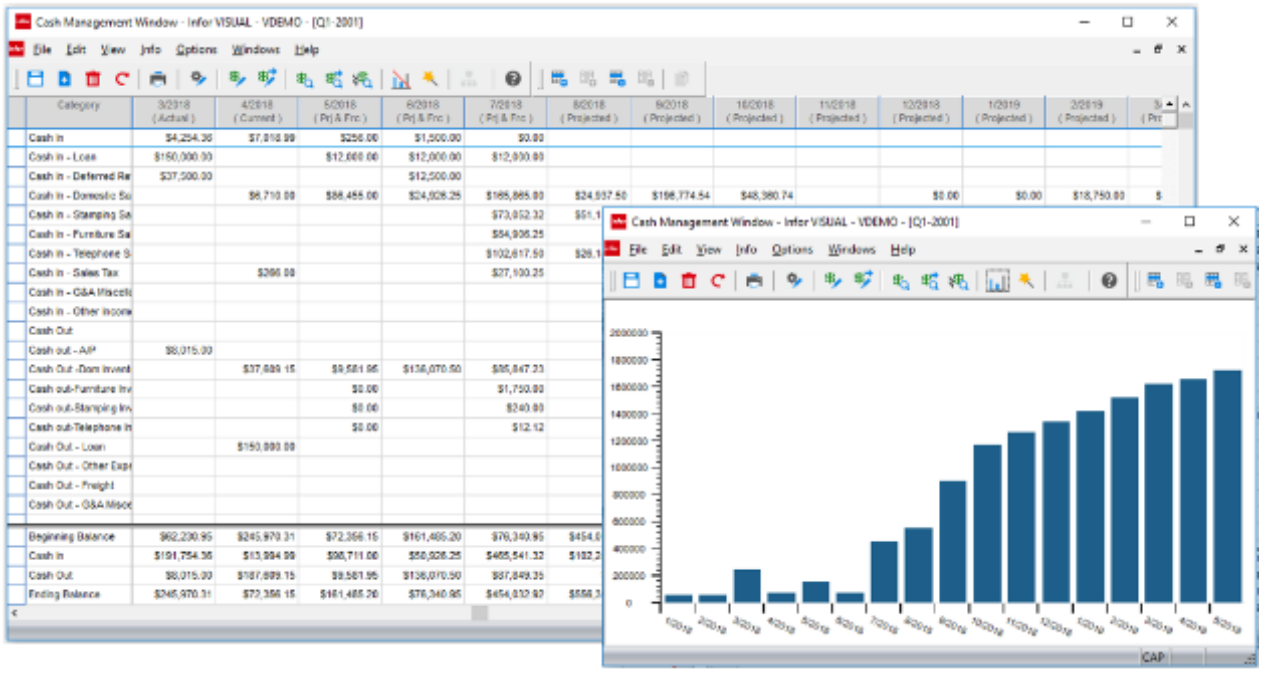
Accounts Receivable



You can create customer invoices in a variety of ways – automatically during the shipping process, as stand-alone invoices, or recurring invoices.

- Generate A/R invoices automatically from shipping activities in Infor VISUAL, emailing invoices directly to customers.
- Assign customer accounts to specific A/R control accounts on the G/L.
- Report customer prepayments and have Infor VISUAL automatically deduct the amount of the prepayment or credit from the invoice total.
- Generate credit memos from returns in Infor VISUAL.
- Create credit memos for price adjustments, then apply them to open invoices.
- Apply cash receipts to specific customer invoices and determine how overpayments and underpayments should be handled.
- Review extensive A/R information available on standard A/R reports, such as Aged Receivables, Customer History, and Customer Statements.
- On-screen review with drill-back capabilities using Document Lifecycle views or Customer Inquiry.
- Create journal entries for Infor VISUAL Financials General Ledger because of A/R processing.
- Share A/R customer payment and credit data with a variety of stakeholders, including customer service reps and sales reps.
- Manage credit risk customers with Collection Schedules.
- Create collection activities to provide diary-tracking capabilities with follow-up notifications.

Cash Management Window



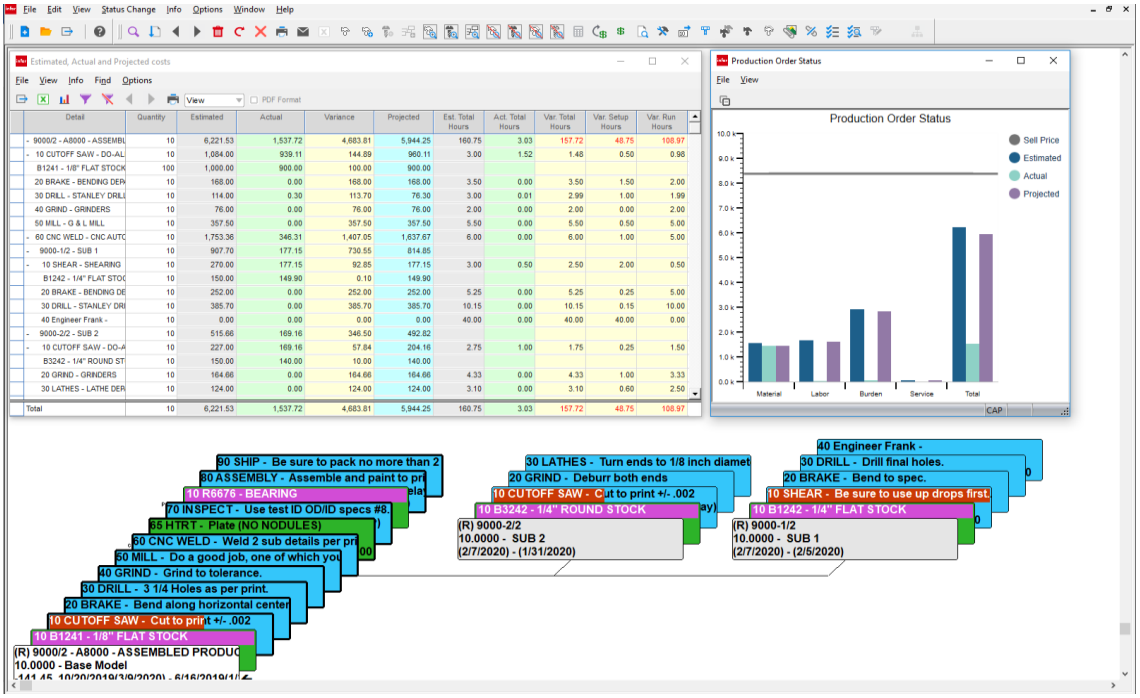
Use VISUAL Financials' Cash Management window to develop accurate cash flow forecasts and review actual cash flow data.

- Predict future cash flows based on actual trends using the online real-time capability of Cash Management.
- Filter cash plans by specific corporate entity or combine multiple entities for a consolidated view of your organization's cash position and/or forecast.
- Create unlimited cash plans.
- Integrate actual cash performance, as well as projected and forecast data.
- Use the Setup Wizard to guide you through the creation process.
- Choose between multiple view capabilities to turn off/on actual, projected, and forecasted data.
- Customize your window with various graphical display capabilities.
- Generate standard performance reports for payment, receipts, and shipments.

Cash Book

- Mirror the bank statement and filter the Cash Book display to view only those items that correspond to the period covered.
- Post bank adjustments to the G/L during the reconciliation process.
- Set cleared items individually, by range or by group, and mark as cleared.
- Add multiple or single line adjustments with the click of a button.
- Drill down and open any item in its native context, simply by double-clicking on the desired record line.
- Balance display control totals to easily check and compare to bank control totals.
- Generate standard reports, including Cash Receipts Register, Cash Payments Register, Cash Book and Bank Reconciliation.

Cost Accounting



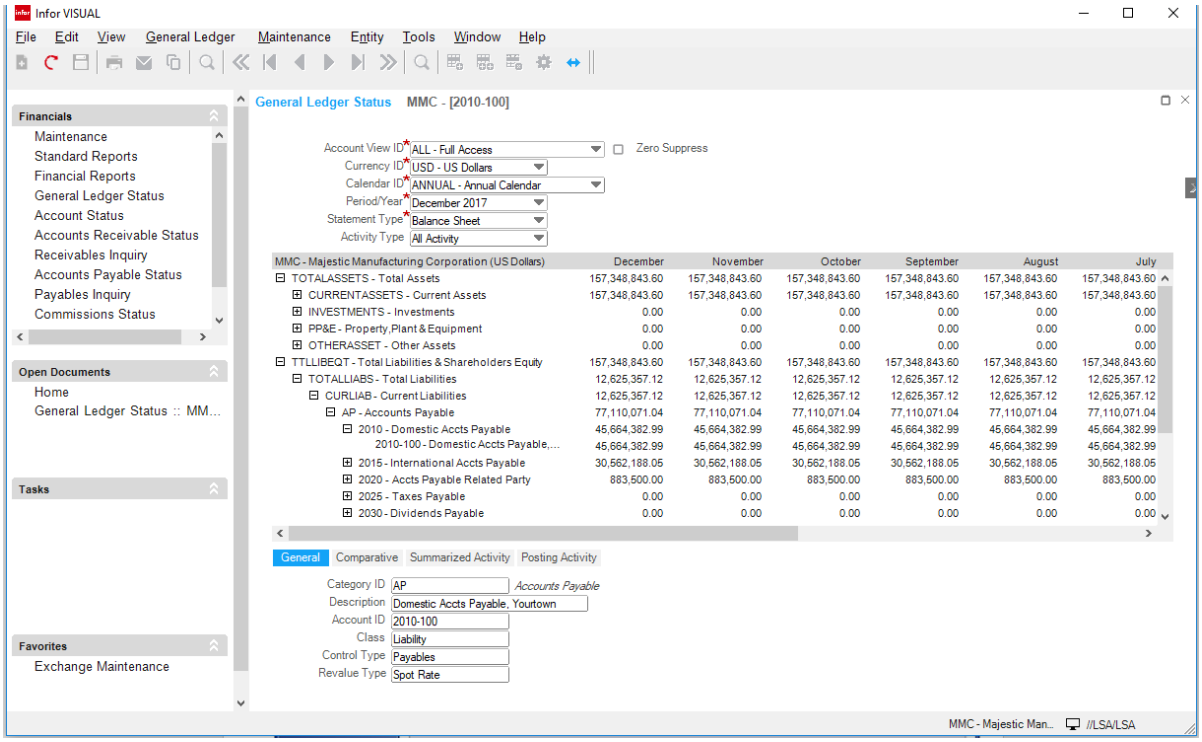
View real-time cost information directly in the Manufacturing Window to see if your jobs are coming in on budget.

The Cost Accounting features within Infor VISUAL support both actual costing and standard costing, providing you with the flexibility to choose the method that works best for you. Infor VISUAL captures costs as changes occur, ensuring up-to-date and accurate costing. You can also link purchases directly to existing work orders through the Purchasing or Manufacturing module, earmarking costs specific to the appropriate job.

Additionally, you can link work orders to specific customer orders, which allows you to know the true margin earned for each customer order. Infor VISUAL automatically charges work order costs for customer orders to the Cost of Goods Sold upon shipment to the customer.

- See up-to-date multi-level comparisons of estimated and actual costs with variance and projection of the final cost.
- Analyze major cost categories, including material, direct labor, overhead, and outside services.
- Link POs to work orders to capture costs for a job, including variances due to changes in price and landed costs.
- Automatically update stockroom and WIP inventory records in real-time.
- Link work orders to customer orders to measure true margins based on costing method.
- Calculate actual costs for a one-time or limited run production without having to add item numbers for both end item and component parts.
- Apply supplier invoice costs directly from accounts payable for non-direct production costs such as shipping fees, installation charges, and any other expense related to the overall cost of the job.

VISUAL Global Financials



Use VISUAL Global Financials to manage your multi-country, multi-currency accounting and cash management needs.

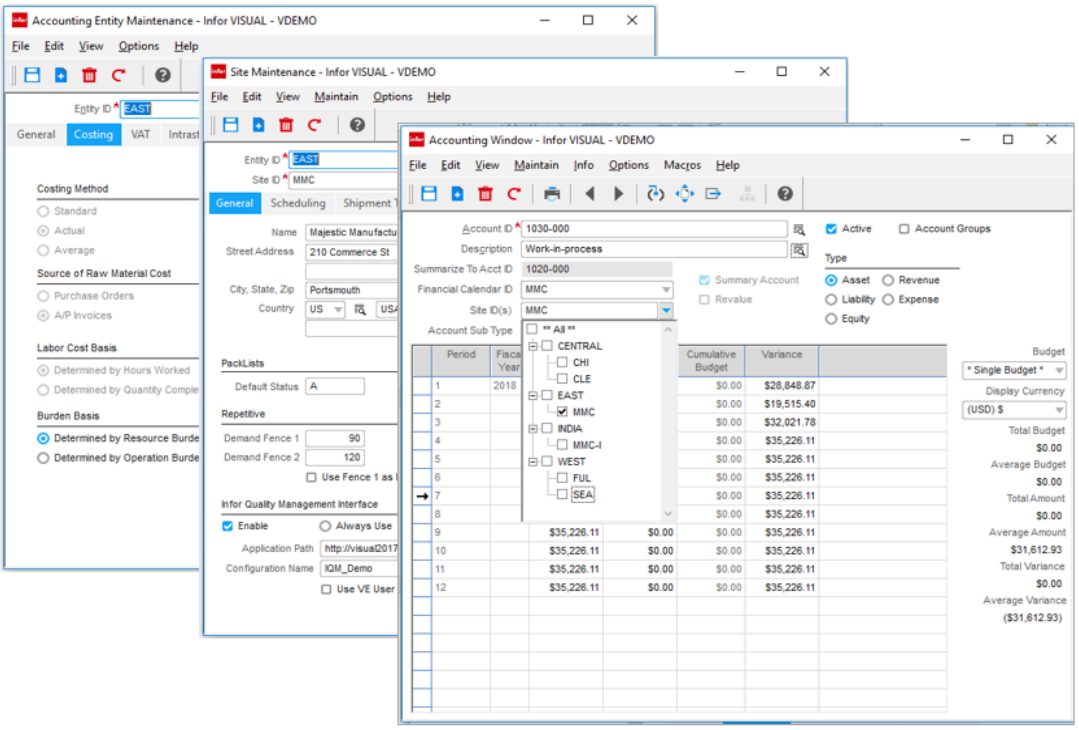
Infor VISUAL Global Financials is designed specifically to meet the requirements of companies operating multiple entities, divisions, sites, and subsidiaries around the world.

Infor VISUAL Global Financials enables companies to work within a multi-company and multi-currency environment with support for global consolidation. You can document all production and warehouse-related financial transactions and segment financial data into appropriate entities for improved statistical and budget tracking and reporting. Infor VISUAL Global Financials promotes faster, accurate, real-time transactions and provides managers across all levels of the company with the information they need to make more informed business decisions.

Infor VISUAL Global Financials is an advanced application to help manage all your company's accounting and cash management demands.

- Real-time processing of financial transactions within a single database or across multiple VISUAL ERP databases.
- Segment financial information into appropriate entities and business components for improved tracking and reporting.
- Work within a multi-company and multi-currency environment with support for global consolidation.
- Create Consolidated and Consolidating Financial Statements.
- Import/Export data through the Consolidation Process and/or Microsoft® Excel
- Define Supplier/Customer groups for enhanced report filtering capabilities.

Multi-entity and Multi-site



Implement multiple entities and sites within a single database to simplify intercompany transactions, consolidation and financial reporting.

With Infor™ VISUAL Multi-entity Multi-site, you can view business transactions across multiple business entities and sites from a single vantage point. It is built from our years of experience helping companies like yours meet their toughest challenges, including the need to simplify multi-site, multi-entity management within one enterprise.

Companies with multiple organizations or business units can easily maintain accounting records and financial statements for each entity, while quickly and automatically rolling up the information to the parent company for enterprise-wide reports. You can control inventory, work in process (WIP), planning, scheduling, and costing for all of your sites from a single, centralized location.

You'll see benefits in various areas, including:

- Multi-entity and multi-site all in one database.
- Consolidated financial reporting.
- Financials from each site rolling up to the entity.
- Separate manufacturing sites for WIP.
- Easy movement of inventory between entities or sites.

Sales, purchasing, and inventory management

By having the ability to use one database to track separate estimates, sales orders, RFQs, purchase orders, and RMAs by site, you have the foundation for an exponentially more efficient enterprise. Infor VISUAL Multi-entity Multi-site makes it easy to automate orders and move material between sites through quick stock transfers online. You can also buy and sell between and within accounting entities with minimal manual record-keeping. Engineering Masters, Quotes, and Work Orders are site-specific as well, so you can have clear visibility of these details by location.

Planning and scheduling

Because each site has its own production schedule within Infor VISUAL, you can quickly view plans and schedules for multiple sites

simultaneously. With this scheduling visibility, you can make better decisions and eliminate bottlenecks. For example, if one of your sites provides component items to five other sites within your enterprise, you can see this clearly and plan work orders more intelligently. The sharing of master data across all sites means only having to enter the component item IDs once, rather than five times, saving on cost and eliminating errors.

Financial management

All accounts for all sites share the same chart of accounts. You can easily filter the chart of accounts to view activity by site. You can also generate consolidated reports across entities, even if the entities use different financial calendars. You can use the reporting calendars to set up custom reporting timeframes within an entity, such as by quarters or years. The result is that you have greater control and clearer visibility into your financial status than ever before. Compliance is easier. Manual reporting is virtually eliminated. And a detailed, real-time picture of your financials are at your fingertips whenever and however you need it. In addition, by centralizing payment of A/P invoices and cash receipts for A/R invoices, you eliminate duplication of effort, further streamline operations, and reduce costs.

Vendor management

Create vendor IDs that have unique information such as accounting or payment details. Then you can group related IDs for easy management of payments. For example, you can make a payment at the vendor group level and apply the payment to invoices for individual vendor IDs.

Customer management

Create customer IDs that have unique information such as VAT, billing, bank, credit limits, bill-to addresses. When individual IDs are grouped together, you can receive payment at the group level and apply the payment to invoices for multiple customer IDs in multiple sites. This is a valuable time-saver, especially if you provide products to multiple locations of one company, invoice separately for those locations, and get paid with one check for multiple invoices. No more manual workarounds to account for these payments. You can now manage these consolidated payments quickly, easily, and accurately.

Contact management

You gain support for more than 3,200 addresses. Instead of being keyed to the customer name, for example, contacts are their own unique master record with associations to customers. This provides greater ease and flexibility in managing your contact base from a centralized location.

Security management

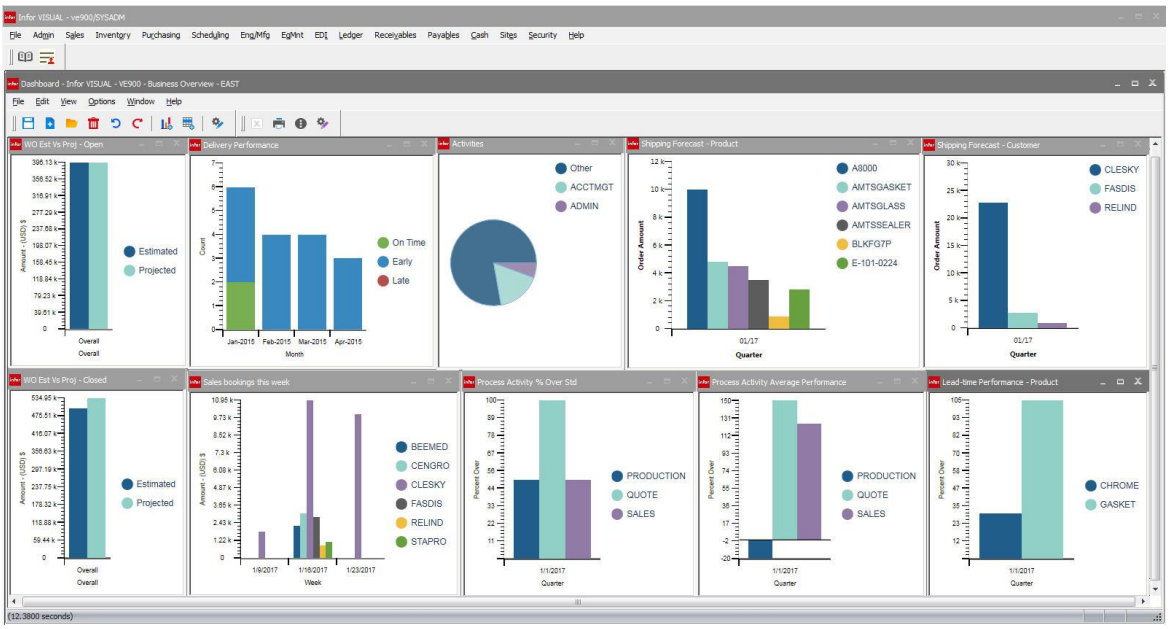
You can assign users at three levels—allowable, viewable, and default. The system administrator assigns users to their allowable sites, while users can decide which of their allowable sites are viewable and which site is their default site. Because users can only access data belonging to their allowable sites, you have tight security between sites. By the same token, employees can enter labor tickets for any site they are permitted to use, but not for any other sites that restrict them.

Equipment maintenance

You also assign site IDs to equipment to more easily manage equipment maintenance—either planned or unplanned. This also ties directly into scheduling, so you know if or when equipment is scheduled for down time by location. This is critical knowledge for manufacturing companies today.

Performance Management

VISUAL Dashboards

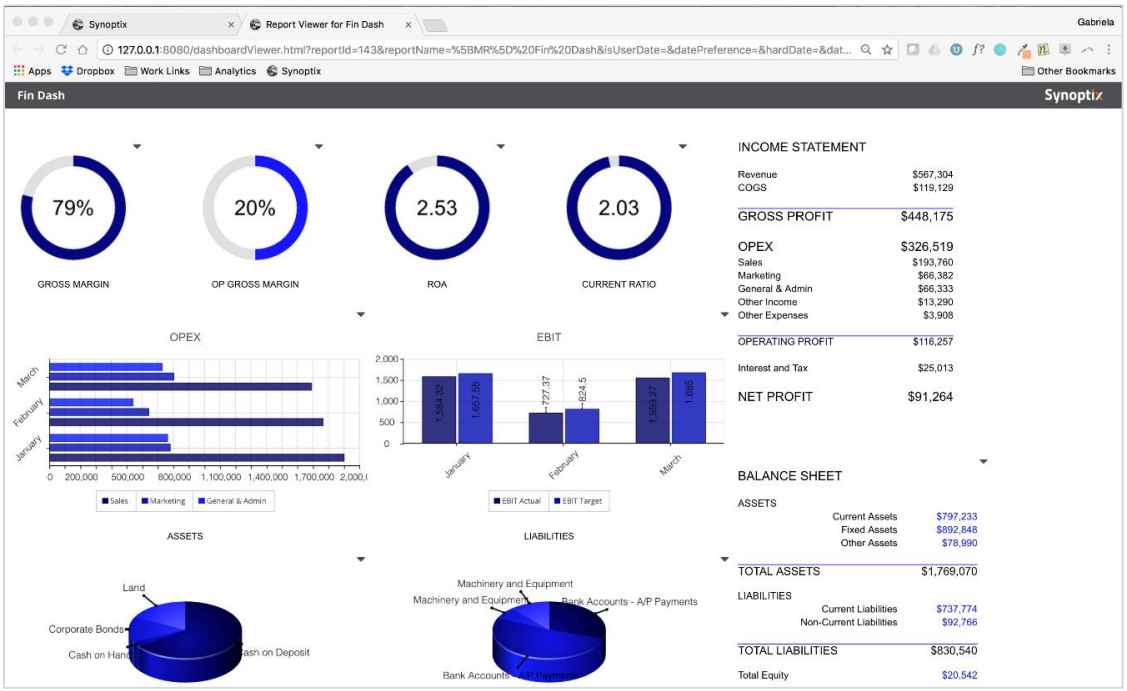


Use VISUAL Dashboards measure the overall health of the business or your area of responsibility.

Using the built-in VISUAL Dashboards feature, users can create informative analytics and views, accenting both positive and negative business trends. VISUAL Dashboards contain several predefined analytics that cover procurement, sales, finance, and production. And don't worry: if you need specific views into the business data, you can create your own.

- Create one or more dashboards per user based on their needs; for example, one for sales and one for production. Or, combine both into one.
- Drill from graphical view to detailed grid, with complete drill-down to all documents – sales orders, work orders, purchase orders, and all other transactional information to perform a more detailed analysis.
- Critical information, such as late orders or projected costs exceeding estimated costs, is highlighted in red, directing you to those items that might require immediate attention.
- Select from a wide variety of predefined analytics or create your own.
- Create and test analytics in your test database, importing into production when complete.
- Create dashboards, set security, and deploy to your end users.
- Change analytic filtering and search criteria on the fly, and save formats for the next time you sign in.
- Dashboard data updates dynamically as information is being entered in the system.
- Access data from VISUAL and outside data sources

VISUAL Business Intelligence



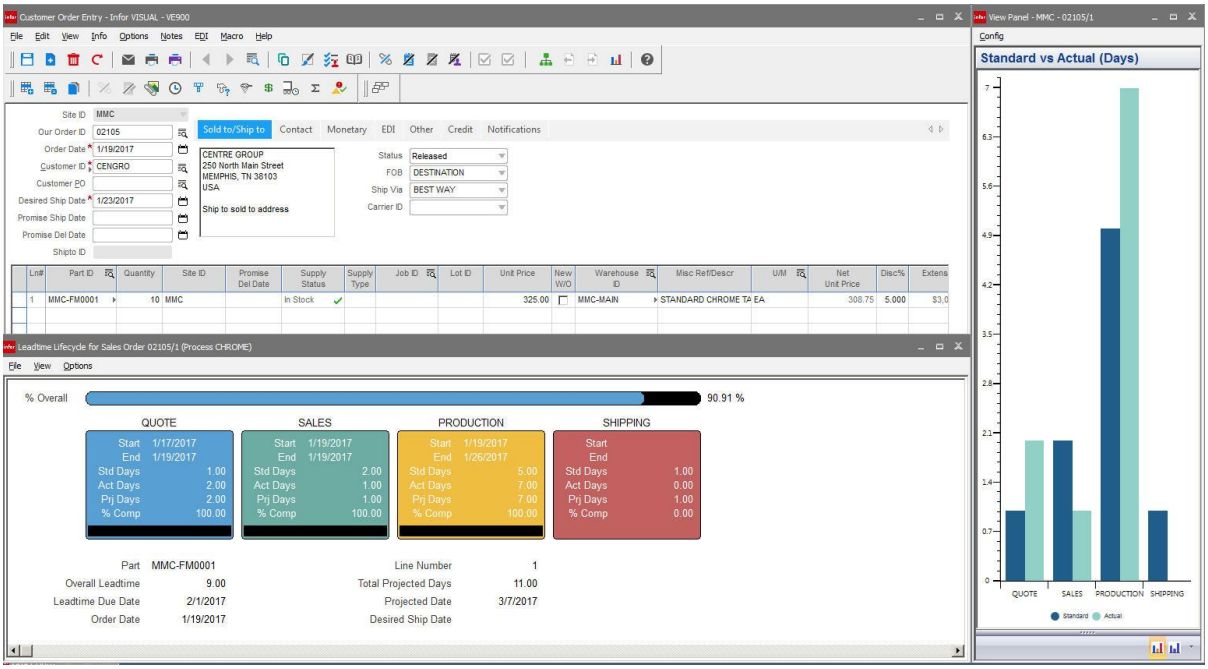
Use VISUAL Business Intelligence for your extended dashboard and reporting needs.

Infor VISUAL Business Intelligence (VBI) offers pre-packaged views, as well as in-depth customizable management views and reports that you can use to analyze key performance metrics. VBI's powerful reporting tools provide clear answers about what is happening with revenue or operating costs and, more importantly, highlight the factors that reveal why situations occur. Managers can use this information to make more strategic and profitable business decisions.

When you deploy VBI across your enterprise, you can take advantage of complete OLAP (On-Line Analytical Processing), graphing, and reporting functionality. By manipulating and viewing shared multidimensional information, you can pool information in VBI from across VISUAL and other in-house applications. VBI also collects metrics about multi-site operations and worldwide sales statistics and combines this data into a single view. With improved access to critical information, and by avoiding the time and cost associated with creating and distributing reports, you can save money and focus on continuous improvement.

- Perform in-depth business data analysis using query and reporting tools.
- Collect metrics about multi-site operations and worldwide sales statistics and combine this data into a single Information View.
- Create custom reports that include exception highlighting, calculated fields, rankings, and other features.
- Choose to use eDeployment; VBI's Web Client, that offers full OLAP, graphing, and reporting functionality. Access eDeployment via a network, the Web, or email.
- Access key performance indicators and scorecards and drill down to specific information using an executive dash-board (Excel-based graphical display). VBI sends email alerts to notify personnel when the indicators exceed a defined threshold.
- Receive a clear picture of revenue or operating costs and understand the factors that reveal why situations occur; get a clear, comprehensive view of your business performance.
- Make more strategic and profitable business decisions with accurate data available at the click of a mouse.

VISUAL Lead-time Performance Management



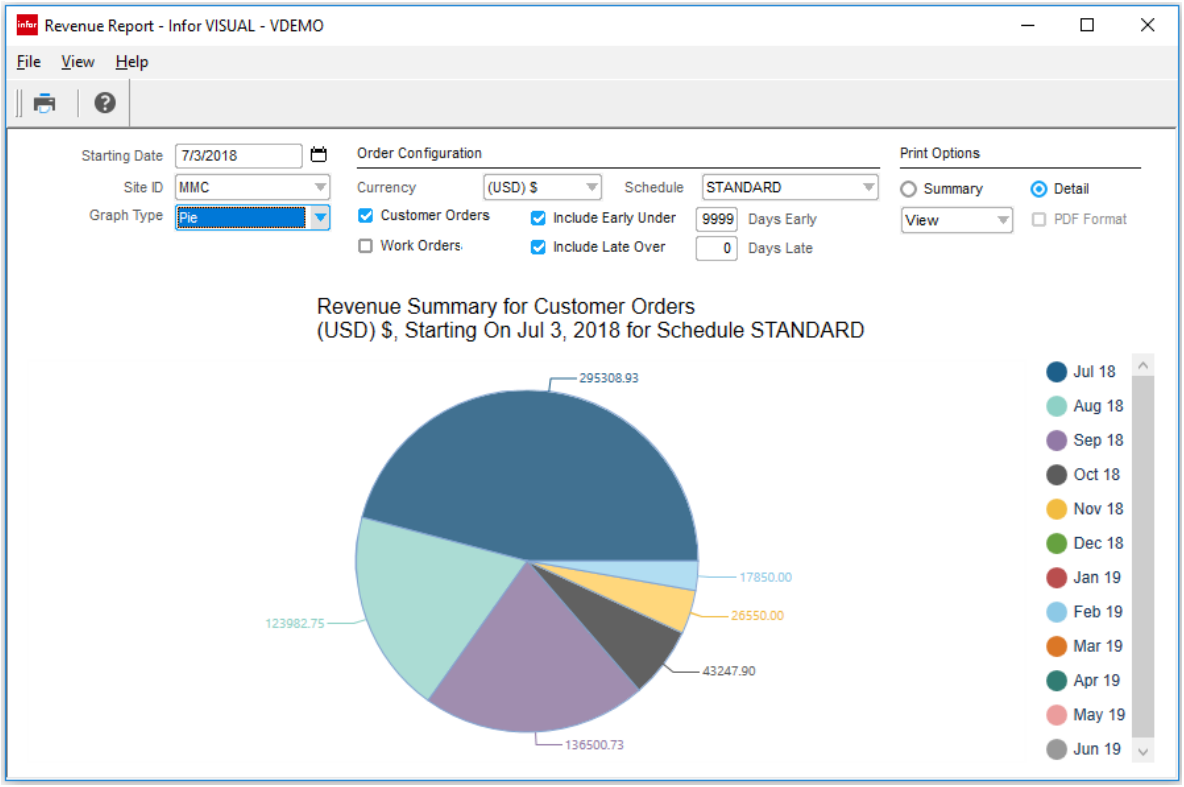
Utilize VISUAL Lead-time performance management tools to help in your Six Sigma and Continuous Improvement initiatives.

Eliminating non-value added steps and time in the delivery process not only increases your revenue potential, but helps increase customer satisfaction by shrinking delivery time. Using Infor VISUAL's Lead-time Performance Management, companies can measure performance across product and functional areas of the business, identifying ways to improve overall performance.

VISUAL's Lead-time Performance is an invaluable tool for those companies focused on continuous improvement. It provides real-time insight into what steps in the process are consuming excessive time.

- Measure product and functional performance against established standards or goals.
- View the current and projected performance of an order in real-time with estimated and actual performance against each step in the delivery process – from quote to cash in the door.
- Add lead-time performance measurements to your VISUAL Dashboard, gaining a global view of performance across product or functional areas of the business.
- Use VISUAL's automated mode to collect lead-time data, or create macros to collect company-specific detailed step data.
- Drill-down to see the actual start, stop, total hours, and percent complete information for each step within a sales order's lead-time lifecycle.
- See projected lead-time based on what's complete and what's remaining.

Core Solution Reporting



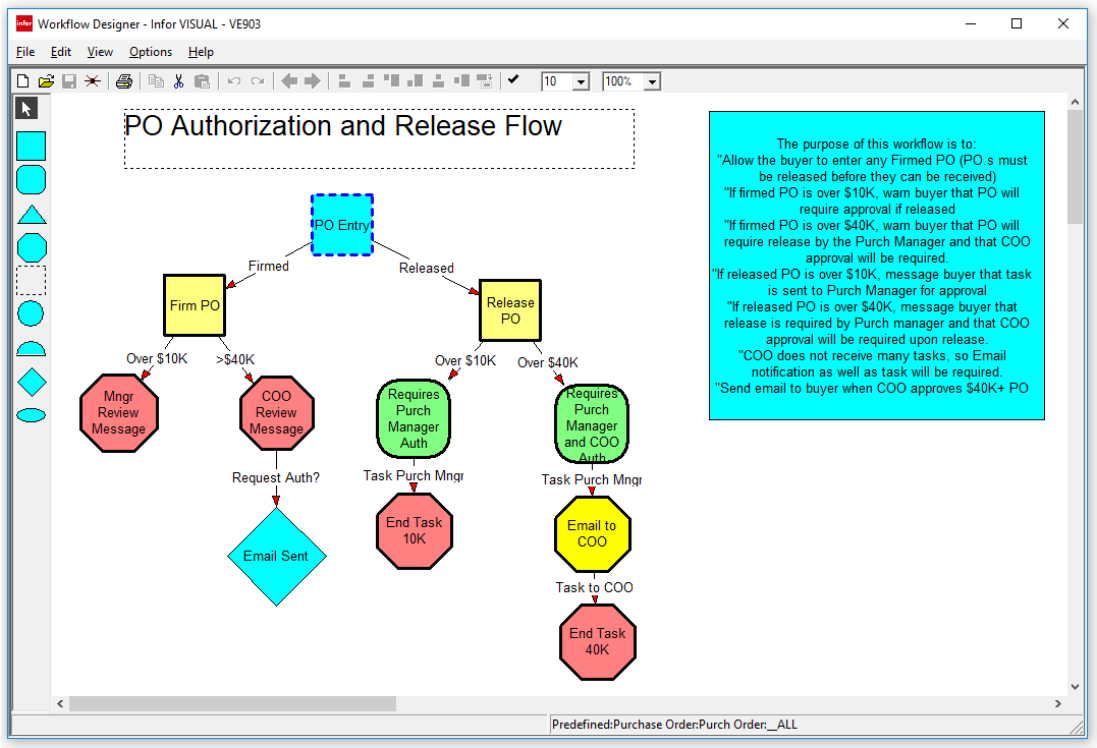
Run one of the many function-centric reports throughout VISUAL to provide an overview of activity and identify positive and negative trends.

Infor VISUAL contains hundreds of predefined multi-selection criteria reports that provide insight into all functional area features of the solution. Whether in sales, purchasing, finance, or production, you can choose from several built-in reports. All reports can be viewed onscreen, emailed, or sent to file (Excel or PDF).

- View reports on-screen, print, or send to a file.
- Modify the output format of all reports, moving, adding, and deleting data elements for the report that fits your need.
- Utilize the flexible selection criteria to retrieve only the information you desire.
- Output reports to Excel or PDF for emailing.
- Print reports for single or multiple entities or sites, for easy consolidation of information. (Requires the Multi-Entity Multi-site feature)

Solution Framework

Workflow



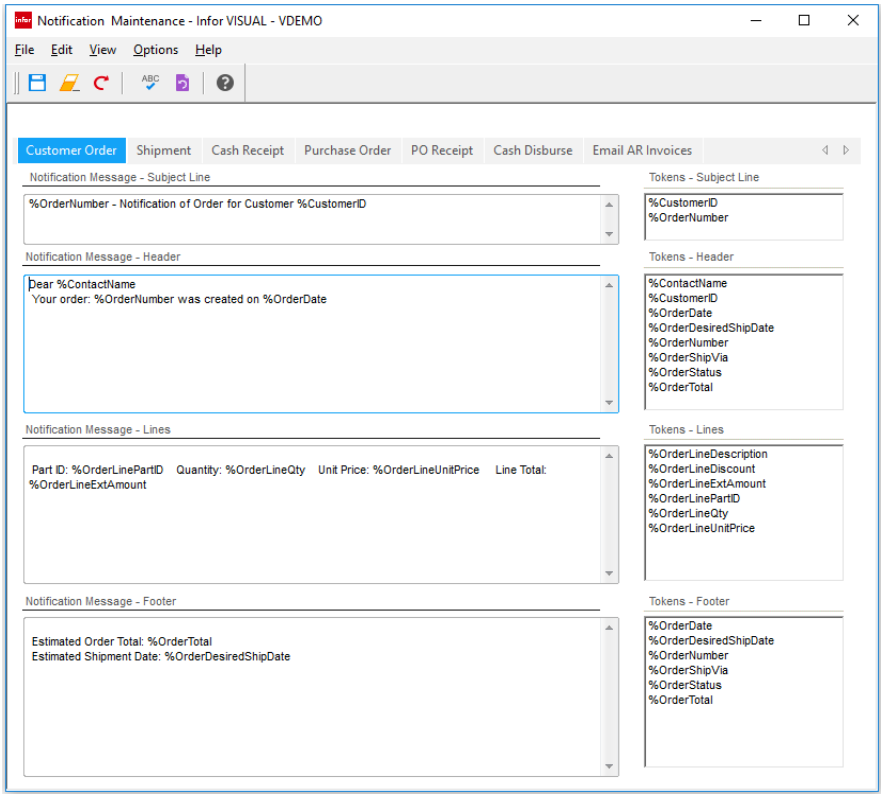
Use VISUAL Workflow to design the processes you want your employees to use as they perform their day-to-day business tasks in VISUAL.

Automate your processes and integrate your policies and procedures into Infor VISUAL with Workflow. Workflow is a business process management tool that allows information to pass from one person or department to another through a process cycle. Predefined rules dictate courses of action. Use Workflow to ensure a logical, repeatable flow that is specific to the unique architecture of your business.

After defining a workflow, companies can release this design into the Infor VISUAL system where it operates behind the scenes. Various mechanisms notify users of tasks and activities that require action. The system can route information, such as customer orders, purchase orders, or engineering changes, to internal and external participants in the business process, incorporating approval functions along the way. Users can also, conveniently track and monitor the status of documents using Workflow.

- Automate business processes.
- Route documents throughout the organization.
- Create automatic email notifications.
- Shorten the lifecycle of otherwise lengthier manual processes.
- Create workflow tasks for users.
- Initiate approvals for workflow steps.
- Track individual workflow documents throughout the process.
- Ensure consistency and compliancy to rules, policies, and procedures.

Document Lifecycle Notifications

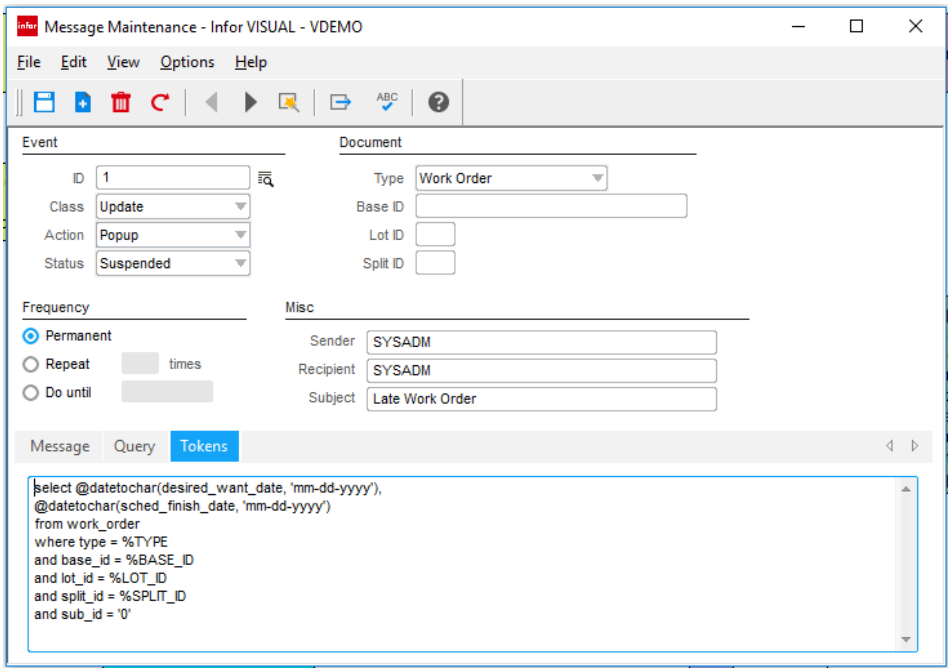


Easily create and send notifications when a document is created or edited, letting customers, suppliers, or employees know that the event occurred.

Keep tabs on orders, shipments, and payments with VISUAL Notifications. You can follow entire sales or purchase orders, or individual lines, and receive emails when an event occurs, such as a shipment. You can also email customers and vendors after an event, eliminating the need to remember to notify a key stakeholder when something important in the delivery or receiving cycle occurs. You can set up notifications for individual business documents, or you can set them up globally for at the customer or vendor level.

- Establish notification rules and recipients at the customer or supplier level for recurring automation and as part of the standard operating procedure.
- Set notifications at the order level when you prefer using notifications for exception level reporting.
- Notify both internal and external stakeholders.
- Create standard notification email templates for each type of business document.
- From the order, view the notification history indicating who was notified, what the notification was, and when it was sent.
- From the notification history, drill down to the subject document related to the notification.

VISUAL Messages



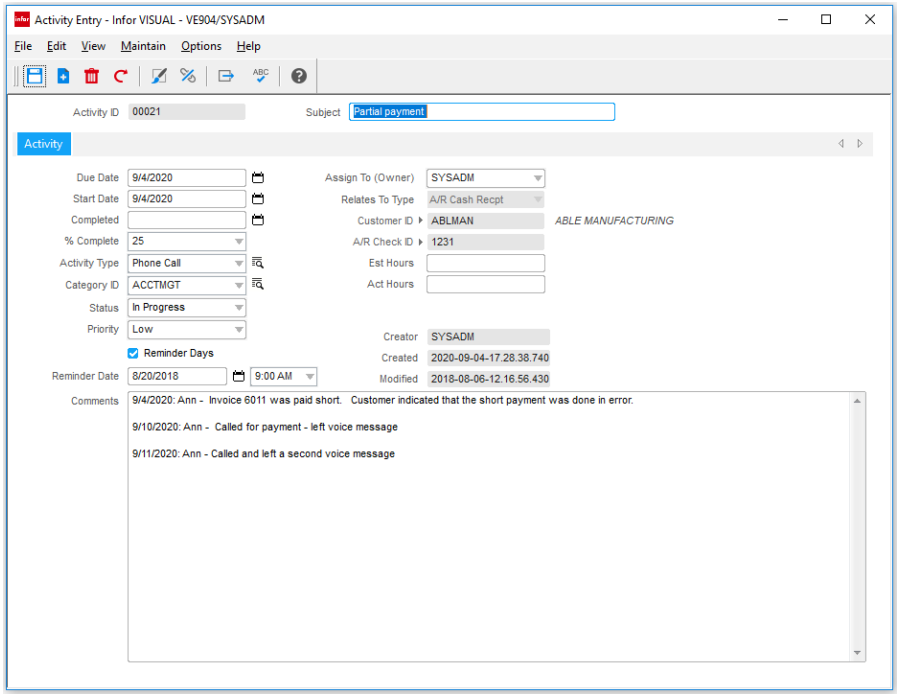
Use VISUAL Messages to create event notifications based on customized queries.

Infor VISUAL Messages is a powerful workflow communication tool for your manufacturing business. It transmits important information to the appropriate person, either within or outside of your company, using the familiar features of email. For example, you can automatically send an email message to your customer when you ship their order. In addition to email, Messaging also delivers alerts to user workstations, pagers, cellular phones, printers, and fax machines.

You define the important events within the business processes that trigger Infor VISUAL to create and transmit messages to key personnel. This allows your employees to focus on other business without the necessity of constantly checking in, while ensuring that they will be informed of, and can act on, critical information.

- Generate and route automatic messages to one or more recipients based on events that occur within Infor VISUAL.
- Specify standard messages, or define your own variable content message.
- Include binary data, pictures, bitmaps, and text documents.
- Direct messages to company email, Internet email, user workstations, pagers, cellular phones, printers, and fax machines.
- Choose between multiple event types, including user-defined queries.
- Request status information on messages.
- Setup automatic database queries.

Activities



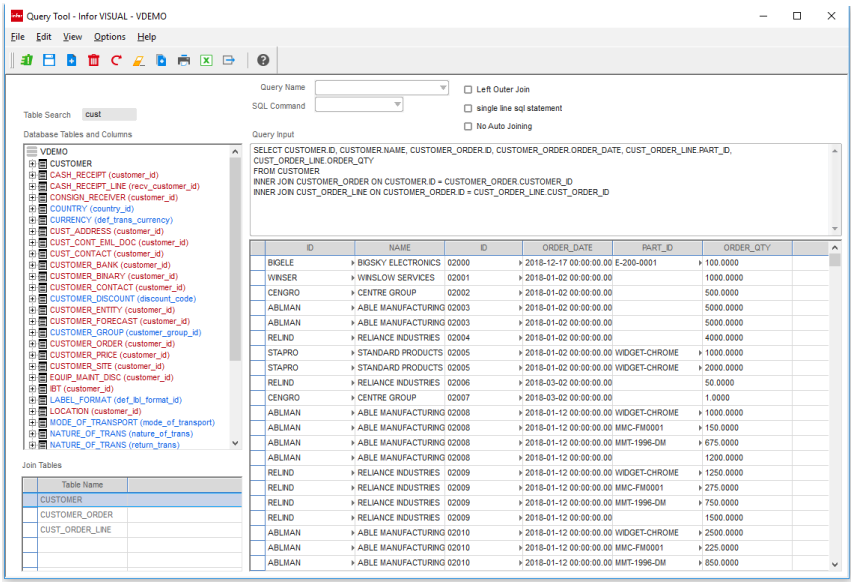
Use VISUAL Activities to record information related to documents such as emails, phone conversations, and meeting notes.

Infor VISUAL Activities provide an important capturing point for information related to a sales or purchase order lifecycle, such as emails, phone conversations, meeting notes, and related attachments. With VISUAL Activities, all important information for an order can be maintained within the enterprise business system. Eliminate disconnected systems and data islands by implementing business procedures using activity functionality.

With VISUAL Activities, you can add additional control to your business processes and assign activities to employees as tasks or follow-ups, making sure nothing gets missed or forgotten.

- Attach activities to any business document (sales orders, purchase orders, cash receipts, etc.) as well as master files such as items, customers, and suppliers.
- Define activity categories and types as part of your business strategy and standard operating policies.
- Create and assign activities to employees for tasks that need to be completed. Activities are added to employee to-do lists.
- Set up reminder dates for activities requiring follow-up, such as a collection call or checking on the status of a delivery.
- View all activities associated with a customer or supplier prior to calling so that you have a complete understanding of all customer related “activities” as well as financial position.
- Review activities directly from the graphical document lifecycle screen. You can view all activities associated with a particular sales or purchasing lifecycle.

VISUAL Query Tool & Data Source Lookup

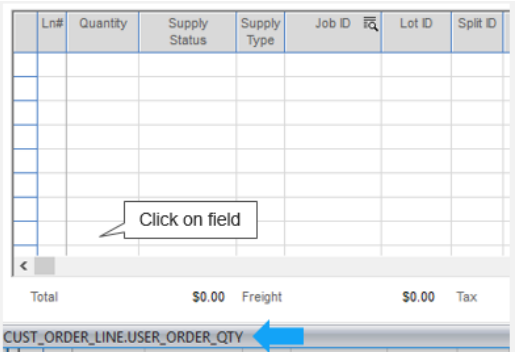


Use the VISUAL Query Tool to learn the database table structure and build and deploy queries using the drag-and-drop query builder functionality.

The VISUAL Query Tool provides companies a comprehensive path to building simply queries against the VISUAL database, assigning security to queries created, and publishing to the end user. In addition, as queries are being created the VISUAL Query Tool identifies the table relationships in the VISUAL database, making it the perfect tool for understanding the database schema.

As a companion to the Query Tool, users can point-and-click on a major document data field, such as a sales or purchase order, to identify the table and column in the database containing that information.

Eliminate the guess work associated with your report building needs using the VISUAL Query Tool.



Click a data field to determine where the information is maintained in the database.

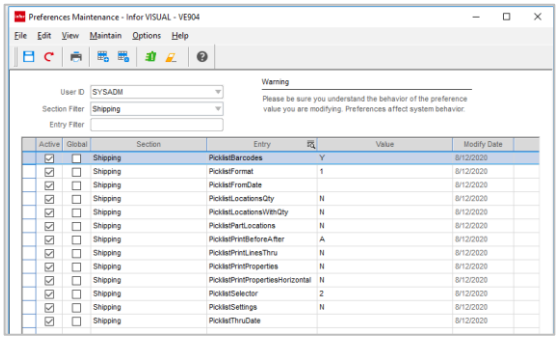
- Use the Query Tool drag-and-drop feature to automatically create database queries
- Save queries that you created to the database and assign them to end users via icons on their personalized toolbar.
- Drill directly to documents and master files identified on the query. For example, if a customer's invoice is listed in the query, users can drill directly to the invoice from the query.
- Specify selection criteria for the query.
- Use the free-form query option to create the exact query and format you desire.

Configuration & Modifications

Every company has unique requirements, from what and how information must be captured, to the appearance of the marketing documents sent to customers and suppliers.

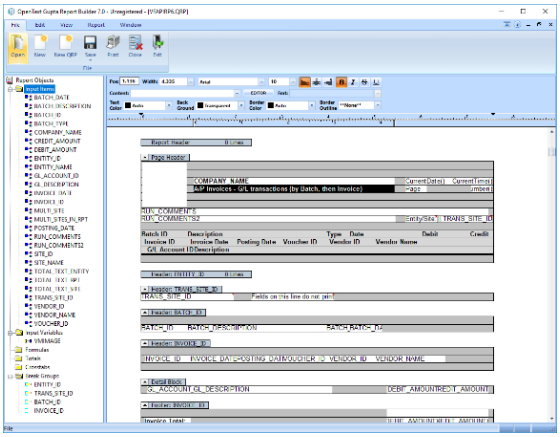
Whether a minor system behavior, minor tweak in screen appearance, or a sizable customized extension, Infor VISUAL provides the tools you need.

User Preferences & Formatting



From screen size, position of form on the screen, or how the application itself behaves, Infor VISUAL can be tailored to both your business and visual needs based on a combination of drag-and-drop positioning and individual control selections.

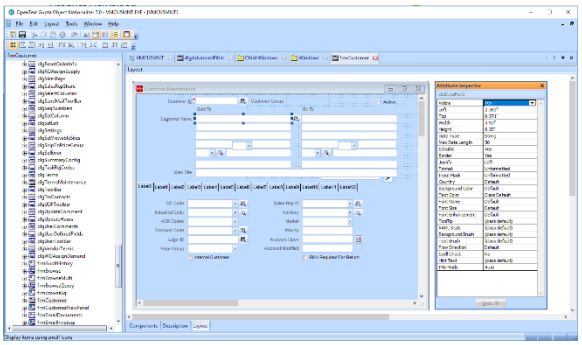
Report Builder



Customize standard VISUAL Report outputs or build your own reports using VISUAL's powerful Report Builder tool.

- Move, delete, or add information to standard VISUAL reports.
- Format report layouts to fit your business needs, such as invoices, purchase orders, and other marketing documents.
- Build your own reports if the one you need is not included in the VISUAL Report library.

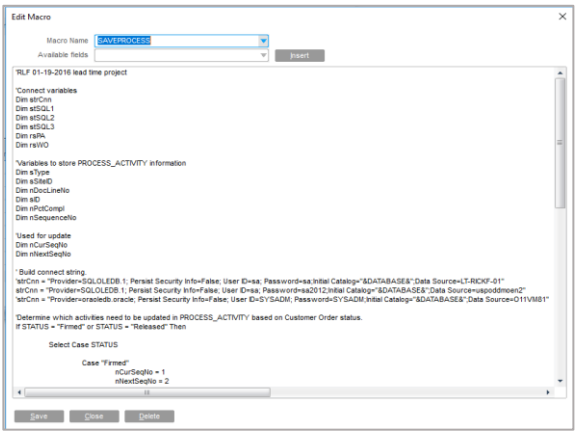
Object Nationalizer



Modify VISUAL screens to match your business needs using the Object Nationalizer, helping to streamline flow and increase productivity.

- Eliminate non-mandatory data elements from the screen.
- Design the screen layout to fit your needs, moving fields, adding borders and colors, and changing labels.

Macros



Create in-line Marcos that execute calculations, open auxiliary applications, run data checks, populate data fields, and much more. VISUAL Macros help streamline company specific business processes by assuring all business requirements are met and information is entered accurately.

API Toolkit

When custom integrations or extensions are needed, a full set of VISUAL API's are available, eliminating the complexities associated with having to understand the database schema and business logic.

Infor ION

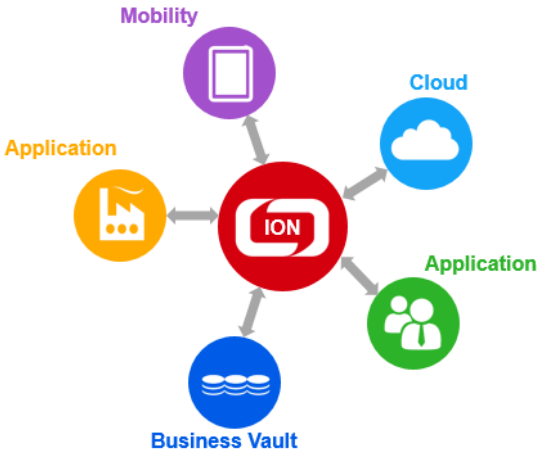
Infor ION Connect gives the tools you need to make more informed decisions and take effective action immediately.

Connect in minutes - Few businesses can operate successfully with only a single, monolithic software system. Every company with more than a handful of employees needs an assortment of software solutions, each of which yields the best possible results for a specific purpose, such as manufacturing, warehouse management, finance, or HR management. Each of those best-of-breed, industry-specific applications needs to interact with all the others to bring the entire business up to a high-performance level. Infor ION Connect applies a fresh approach to making multiple disparate software systems work as a unified whole, while also accelerating your end-to-end business processes and reducing risk.

Trust a global source - Infor experts bring decades of highly focused experience to an assortment of industries. We've embedded the critical details of that knowledge in our portfolio of software solutions. Now we've added the most important piece of the puzzle—the ability to integrate best-of-breed, industry specific solutions to address your entire business process in a way that best suits the unique requirements of your business and industry. Our goal in creating Infor ION Connect was to create a uniquely powerful connective framework that makes your software systems work together for maximum speed and efficiency, so you can be an industry leader.

Accelerate your business – Infor ION Connect serves as the engine that drives all the other parts of our innovative ION technology stack. Based on open source technologies, ION Connect takes a unique approach to business software integration that includes enough breadth and flexibility to support integration services, cloud services, mobile services, and advanced reporting services within a single, elegant framework. Rather than trying to bolt multiple applications together with clumsy point-to-point database integrations, Infor ION Connect enables each application to transmit and receive small XML documents, called Business Object Documents (BODs), into the ION Connect framework. Each application can subscribe to the BODs that relate to its task and ignore all others. That way every application gets access to business-critical information without being slowed down by information that only applies to the work of a different application.

See the results – Infor ION Connect gives you a complete, end-to-end view of your business and combines that view with the tools you need to make more informed decisions and take effective action immediately. It also gives you vastly improved reporting capabilities to help you monitor performance and make better plans and forecasts. In today's volatile market, ION Connect gives you the ability to respond with the speed and flexibility you need to overcome new challenges and take advantage of opportunities as they arise.



About Infor.

Infor is the world's third-largest supplier of enterprise applications and services, helping more than 70,000 large and mid-size companies improve operations and drive growth across numerous industry sectors. To learn more about Infor, please visit www.infor.com.

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