Infor VISUAL
Functional Overview

June
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Infor VISUAL Functionality Overview

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Introduction

Order-driven manufacturing is complex enough—you don’t want to guess every time you quote a price on a job or estimate 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 manufacture at a level of speed and efficiency that makes the best use of the resources that you have. With Infor™ VISUAL, you can eliminate guesswork because you’ll be able to see the information you need at a glance and make quick, confident decisions. 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 this type of 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 makes managing your manufacturing more difficult every day. Doing the best you can isn’t good enough anymore. What if you could react easily to any change or request?

When you 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 the visibility to your progress now. 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 to 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, and mixed mode manufacturing.

Regardless of your manufacturing method, Infor VISUAL helps you drive throughout your organization. VISUAL allows you 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 or not your customers require quality certification, they deserve a quality product and VISUAL is there for you to drive quality.

VISUAL provides an intuitive, full-color graphic interface, point-and-click capabilities, and robust search options that allow you to make decisions and act on them immediately. With VISUAL, you get quick and easy access to the crucial information you need to perform your job.

Infor VISUAL’s built-in scalability allows the system to grow with the success of your organization. Applications within Infor VISUAL integrate to provide enhanced, customized solutions for productivity, customer management, engineering and estimating, quality, financials, e-business, human resources, and payroll. This total integration of functionality provides timely, accurate information to everyone in the organization—from the design engineer and the shop floor foreman to the controller and the payroll manager.
## VISUAL Solution Map

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### Customer Relationship Management
- Contact Management
- Lead Tracking
- Opportunity Tracking
- Sales Forecasting

### Human Capital Management
- Human Resources
- Payroll

### Financial Management
- GL, A/P & A/R
- Expense Management
- Multi-Currency
- Project Accounting

### Sales & Order Management
- Quote/Order Management
- ATP/CTP
- Pricing/Commissions
- Order Configuration

### Production Management
- Serial / Lot Control
- Product Configuration
- Production/Process Costing
- Shop Floor Control

### Quality Management
- Engineering
- Supply Chain
- Task Management
- Workflow

### Master Data Management
- Master Item Data
- Document Management
- Bills of Materials
- Multi-Site

### Enterprise Planning
- Item Planning (APS/MRP)
- Scheduling
- Projects
- Aerospace & Defense

### Performance Management
- Business Intelligence
- Financial Reporting
- Planning & Budgeting

### Supply Chain Management
- Sourcing & Procurement
- Inventory Management
- Shipping/Receiving
- EDI

### Event Management & Configurable Platform
- Real-time Alerts
- Workflow
- Notifications and Escalations
Sales Quoting and Estimating

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, retaining the quoting effort and allowing comparison of ‘as quoted’ to ‘as built’. You can create quotes quickly and easily by copying from another quote, an existing work order, or a Bill of Material, then modifying the new quote to match the customer’s specifications. Infor VISUAL computes a cost estimate that includes material, labor, burden, and outside services. 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 technology.

- Attach customer supplied documents for easy reference throughout the life of the quote.

- Copy a quote from another quote, a work order, or Bill of Material and then make modifications as necessary.

- Separate markups for material, services, labor, burden, and GSA.

- Choose your quote price source, either engineering specification, Vendor quote, or standard prices.

- Use a “what-if” analysis to verify the availability of material and capacity in order to determine an order’s delivery date and then lock it into shop resources.

- Automatically print the pro-forma, quote, quote log, and engineering cost report.

- Automatically generate the vendor RFOs (Request for Quote)

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

Infor VISUAL’s Customer Order Entry & Invoicing features allow you to access complete sales order information instantly, while providing your customer service representatives with online support to enter and track customer orders and create invoices.

Infor VISUAL is fully integrated from the point of customer quotes through customer order entry, engineering, production, costing, shipping, and customer service. This allows customer service representatives to take action on credit problems, reschedule requirements, and release orders in a timely manner to meet required shipment dates. It also 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.

- Automatic signals of credit limits, aged receivables, and item availability when entering customer orders.

- Access information about customers including, but not limited to, customer-specific price lists, discounts by part and customer, and online credit checking, as well as customer-specific part 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 acknowledgements, sales orders, 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.

- Fully support RMA (Return Material Authorization) information for customer orders.

- ‘Train of thought drill down’ allows your customer service representatives to track and status customer orders from this window – drilling into the manufacturing orders and their status, if required.

Use the Customer Order Entry window to not only place customer orders, but also to view and analyze information that allows you to quickly respond to the needs of your customers and your business.
Order Management

Order Management allows companies 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.

Order Management helps you 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.

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

The Infor VISUAL Product Configurator is a development tool for manufacturers of complex, highly configurable products with numerous standard and available options. It enables your sales force 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 end 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 parts, 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 Bill of Material automatically from an engineering design.
- Enter catalog numbers easily with Product Code Nomenclature.
- Integrate various toolkits for use within the Configurator.

Use the Product Configurator to customize products as you and your customers see fit.
Price Book

Price Book is a flexible pricing and commission’s tool. Price Book integrates with the Order Management window and other ERP pricing packages. The application maintains its definitions in a separate database from the ERP database, with derivations available through an open interface, allowing Price Book to be a centralized pricing solution.

- 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, part, market, commodity, or groups.

- Adjust prices “across the board” to eliminate redundant adjustments.

- Use custom formulas to create any combination of prices or discounts.

- Define commissions for sales staff.

Use VISUAL Price Book to define pricing for your products, discounts for your customers, and commissions for your sales staff in one, centralized interface.
Return Material Authorization (RMA)

Infor VISUAL allows companies to manage Return Material Authorizations (RMAs), documents that control the return of parts 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.

The RMA process assists in the evaluation all of your costs around repairs and replacements. Costing issues become complicated when you have repairs and replacements, especially when users take in to consideration that the original customer order may not exist in the system, or that the parts being repaired originate from another source. Infor VISUAL RMA manages this process for you.

- Maintain documented control over the return of parts.

- Track information that will improve both your customer service and overall part quality.

- Receive material returns for customer credit.

- 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.

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

Ins inspectShip provides a user-centered on-screen experience with integrated shipping functionality to simplify the shipping process and make parcel shipping simple again.

Ins inspectShip introduces business efficiencies that will result in fewer errors, faster shipment and significant cost savings for Insfor VISUAL users.

Ins inspectShip Features Include:

- Robust shipment planning tools
- On-the-fly rate shopping across carriers.
- Pick and pack options.
- Customer-specific labels.
- Automated international and hazardous materials documentation.
- Automation of tracking and email notifications.
- Advanced Shipping Notifications (ASN) and Electronic Data Interchange (EDI) capability.

Ins inspectShip is created specifically to integrate with Insfor VISUAL. Ins inspectShip simplifies your enterprise shipping function by automating the most repetitive and challenging tasks and eliminating costly errors. Through deep integration with Ins for VISUAL, Ins inspectShip increases your shipping department’s efficiency while simultaneously cutting costs.

Integration of Ins inspectShip with Insfor VISUAL saves your organization money in the following ways:

- Eliminates duplicate data entry and reduces the cost associated with shipping errors cause by data entry problems.
- One user-friendly user interface for all carriers. Manage all parcel and LTL carriers from one shipping station.

- Allows rate shopping across carriers from within one consistent system
- Consolidates similar shipments or backorders to minimize shipping costs.
- Automates complex paperwork. Ins inspectShip makes international and hazardous materials paperwork manageable by handling the specifics for you.

The QuickShip module is the basis for the entire shipping process. This module is where all of the set-up takes place. This is also where you process a shipment. All of the order information is pulled in directly from VISUAL.
CUSTOMER RELATIONSHIP MANAGEMENT

Contact Center

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. Highlights include:

- MS Outlook e-mail management
- Direct Mail campaigns
- Track calls, meetings, to-dos, history
- Organizational charts
- Custom reports
- Account and contact profiling
- Quick back office access to get a 360 degree view of a customer

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 part 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 e-mails, 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 on a daily basis.

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

Infor VISUAL CRM (Customer Relationship Management) provides the tools you need to manage your prospects, customer accounts, contracts, and sales and marketing campaigns. Infor VISUAL CRM includes the Contact Center module above, as well as five optional, add-on modules to address your company’s individual requirements: Sales, Help Desk, Admin, Field Service and Marketing.

Sales
- Improve the effectiveness of your sales team.
- 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.
- Create estimates using a direct interface to Infor VISUAL’s Estimating Window.
- Assign quotas by sales representative, territory, business unit, branch, or division.
- Develop and analyze revenue pipelines.

Use VISUAL CRM to track your sales pipeline from opportunity to closed sale.

Help Desk
- Track customer calls and create a knowledge base of issues and resolutions.
- Manage information with Help Desk’s automated record keeping and helpful search tools.
- Log calls according to Part 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.
**Field Service**

- Deliver exceptional 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.
- Improve customer satisfaction by managing inventory and labor to avoid delays.
- Trace issues by Part ID, serial number, or service contract.
- Enter service orders and search customer records quickly (search by contract number, serial number, or Part ID).
- Auto-generate invoicing and assign charges to the General Ledger.

**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 applications 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.

Customer relationship management doesn’t end with the sale. Use VISUAL CRM to help you track contracts, provide rapid customer service, and continue to build your relationships with your customers.
Inforce

As a successful business executive, you know that even the best can get better. That’s the philosophy Infor™ uses behind Inforce, a powerful combination of Salesforce, the world’s leading sales application, and Infor’s portfolio of ERP applications. Inforce makes it easy to share real-time data between ERP and CRM, so your sales teams have up-to-the-minute information about the status of their customers’ orders, service requests, questions, 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.

The life cycle of marketing, sales, fulfillment, and service spans traditional ERP and CRM solutions. With Inforce, your ERP applications can leverage a deeply integrated, market-leading CRM solution—Salesforce—in a way that truly makes sense for your business. Your marketing, sales, and service teams get ERP-managed information and processes—including comprehensive customer and product information—managed and stored in ERP. Your order fulfillment operations group gets accurate sales forecasts. And your product development team gets immediate feedback from prospects and customers about products and services—and how you stack up against the competition.

Inforce 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 ERP, Inforce lets you share customer-centric information and processes between CRM and ERP.

Through Infor’s unique partnership with salesforce.com, we have developed new functionality, fields, and screens specifically for Infor ERP customers. With Inforce 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, payables, and returns

ION technology facilitates two-way communication between ERP and Salesforce, so that relevant customer data entered in ERP automatically updates Salesforce, and vice versa.

With Inforce, you begin to see results almost immediately. You can:

- More accurately describe the relationship you have with your customers.
- Simplify the tracking of business activities and interactions with your customers.
- Support customer-centric business processes.

Through our partnership with salesforce.com, Infor manages the entire CRM and ERP relationship for your enterprise, from initial discussion through successful implementation and ongoing support. We make it easy for you to realize the benefits of integrated ERP and CRM today.
Infor Motion Road Warrior

When you’re doing business on the road, you can’t be slowed down by lack of access to your back office systems. You need current information anytime, anywhere, along with the power to make decisions quickly and take action immediately while you’re on the move. Infor Road Warrior brings information to where you and your customers do business—on the road, at the airport, wherever the opportunity exists.

Powered by the same Infor ION technology that connects the rest of your business solutions, Road Warrior lets you get work done on the move, then helps you pick up where you left off when you get back to the office.

The “smart” qualities that make mobile technologies so popular can lead to new and innovative ways of working—but only with the help of applications that are specifically built to take full advantage of mobile devices. With location awareness, voice recognition, and constant connectivity, Infor Road Warrior opens up the opportunity to act sharper and smarter—giving competitive advantage to those who strike first. If you don’t make the most of mobile technology, your competitors will. Now is the time to bring the power of mobile technology to your enterprise software to gain competitive advantage.

Road Warrior gives today’s mobile sales professional access to critical customer data in a convenient mobile form. It doesn’t just give you a window on your data; it delivers sharper insight and responsiveness that rivals its desktop counterparts, including:

- **In-context business intelligence**—Road Warrior automatically zeroes in on information that’s most likely to be valuable in the context of the work you’re doing at any given moment, accessing graphs, charts, and critical information with the swipe of your finger.

- **Location awareness**—By taking advantage of the built-in location features of your smart device, Road Warrior maps the locations of nearby customers and other resources.

- **A view of what matters**—The Road Warrior interface displays links to popular collaboration services, such as Skype and Facetime, so that you can initiate discussions without having to launch a new application.

Road Warrior, powered by Infor Motion, gives you fast, reliable connections to all of your business applications. Also, there’s no need to integrate and provision mobile apps—device and application management functions are built into the Infor ION technology framework.

Above all, Road Warrior reflects the reality of today’s mobile workforce, with in-context business intelligence that helps you focus on information that’s relevant to what you’re doing and where you’re working. For example, it’s not enough to be able to view an account record—a travelling account rep needs to know about late orders, outstanding invoices, customer service issues, and a whole range of timely and relevant information that can affect a sale. Road Warrior displays all the relevant information in context to help you do business better.

When you’re in motion, your work should stay in motion with you. Infor Road Warrior lets you get things done at more times and places than you could before. By designing native apps that harness the power of mobile technology on your tablet or smartphone, you increase your ability to work faster, smarter, and differently, giving you competitive advantage and giving your customers what they want, when they want it.
PRODUCTION MANAGEMENT

Manufacturing Window

The Manufacturing Window is the master engineering and production management application for Infor VISUAL. 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.

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

- Create, view, and modify engineering plans using 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 multi-level, hierarchical, or split-window. Or you can define up to six custom views with color-coding and size options.
- Display a costed Bill of Material with estimated, actual, variance, and projected costs.
- Perform "what-if" scheduling, availability checks, and material netting with the option to generate purchase orders.
- Display a history by revision level for the Bill of Material.
- Create quotes and work orders automatically.
- Drill down to view labor and inventory transactions without leaving the Manufacturing Window.
- Completion meters graphically indicate progress of each work order.

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

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 allows you to view the schedule in a full-color, graphical format. Zoom capabilities allow you to closely focus on a portion of the schedule or see the long-range plan of operations. The “Drag and Drop” feature allows you to make adjustments to a “what-if” schedule quickly and simply by clicking and dragging with the mouse.

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.

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

Infor VISUAL offers you complete shop floor control through seamless integration of all its features, including inventory control, material and labor tracking and reporting, purchasing, and scheduling. Infor VISUAL provides complete control over production operations, which eliminates redundant data entry and ensures consistency and accuracy throughout the shop floor.

- Generate work order travelers that include work instructions, linked files, design documents, pictures and bar codes.
- 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.
- Generate dispatch lists for your work centers.
- 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.

VISUAL offers a full range of reports to help you analyze your production performance.

The Work Order Traveller provides your shop floor with all the information they need to efficiently and accurately manufacture your products.
Infor Motion Shop Floor

Bring new levels of speed, convenience, personalization, and collaboration to your manufacturing process with Infor™ Motion Shop Floor. You will get a clear view of every production order, or job, as it moves through the process, so you can see required resources and predict possible shortfalls—from start to finish. And because it is a native application, Shop Floor leverages video collaboration tools like FaceTime® to help you solve problems fast. Imagine being able to show a problem through FaceTime and getting help now, rather than waiting for someone to come across the plant to assist.

With Infor Motion Shop Floor, production supervisors and plant managers gain keen insight into every aspect of the production process, without being confined to a desktop or laptop. Easily personalize the app interface so it is most relevant to your role, helping you stay on top of the issues that are important to you.

With Infor Motion Shop Floor you can:

View your materials. Do you know what materials or parts are required to fulfill a job? Can you check materials inventory quickly to see if you have enough in the storeroom? Can you easily access purchase orders to see if supplies are being replenished, and when? Use Infor Motion Shop Floor to get immediate answers on the fly to these and other questions so essential to keeping production flowing smoothly.

Know your employees. Not all your people have the skills required for every job. And not every day on the shop floor is a “normal” day. Special VIP orders sometimes jump ahead of standard production, or you might be working to offset production shortages from another plant. Whatever the scenario, Infor Motion Shop Floor gives you an immediate view of who is on the job—complete with an inventory of their individual skillsets—so you can easily move workers from job to job, put their skills to best use, and avoid costly disruptions in the workday.

Track your resources. Know precisely what tools and machines are required and available to execute a production order, and use Shop Floor’s slick visualization feature to see the progress of any order as it resides on a specific resource. Production supervisors can view a step-by-step accounting of resources for each specific task in the process, so you know what a resource is doing, in the event a VIP order causes disruption. As a result, users make well-informed decisions based on up-to-the-minute information about resource utilization. Your plants gain the flexibility to ensure you get the job done, whether scheduled or not.

Infor Motion Shop Floor leverages the iPad® experience to give users a neatly organized view of every operation involved in moving a job from sales order to shipment dock. You not only gain insight into every job in the production process—you can interact with it at every level of detail, from macro to micro. You can personalize the app with specific watch lists that let you pin different jobs, operations, customers, and more to the home screen for immediate reference to top priority projects. Like all Infor Motion apps, Shop Floor will make you more responsive by letting you access your work tools from wherever you are. With immediate information being delivered from your ERP through the Infor ION integration platform, you become more engaged in your jobs, and gain tighter control over your success in delivery.
Common Sense Throughput for CEO's

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.

Use VISUAL’s Common Sense Throughput to identify ways to make your business more profitable.
**Easy Lean**

Infor VISUAL Easy Lean is a fast-implementing solution providing 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 levels low and your ability to respond to customers high.

By incorporating shipping and inventory buffers into scheduling, the system allows you to protect both customer due dates and constraint resource schedules, as well as protect the availability of raw materials, purchased parts, common subassemblies, replacement parts, and finished goods.

- 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.

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

- 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.

Use VISUAL’s Easy Lean feature to keep inventory levels low without compromising your response to your customers.
Engineering Change Notice

The Engineering Change Notice (ECN) module allows you to establish controls and manage the process of making changes to documents and drawings, parts, Bills of Material (BOMs) and routings, work orders, and projects.

- 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 parts, 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 parts and in-process work orders while they are under ECN control and notify engineers and production personnel of pending changes.

- Update part or document revision levels automatically upon incorporating changes.

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.
Barcode Tracking System

To meet your inventory management and labor tracking needs, Infor offers you Infor VISUAL Barcode Tracking System (BTS).

Using barcode technology, Infor VISUAL BTS allows your enterprise to automate 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 System (AMTS), Automated Labor Tracking System (ALTS), and Wedge/PC Barcoding to help you manage material, inventory, and labor and optimize your workflow. It also offers a label print utility that seamlessly integrates Infor VISUAL and Loftware® Print Server, providing barcode label design and printing technology. Together with industry-leading Loftware label design and print software, Infor VISUAL BTS supports a range of customer and standard label types.

Material Barcoding

Automated Material Tracking System (AMTS)

By incorporating AMTS functionality, Infor VISUAL BTS uses barcode hardware to help companies optimize inventory and manage material and finished goods. With barcode technology, you no longer have to search for "lost" parts or wait for batch updates to perform planning activities. Infor VISUAL BTS provides the functionality and integration that you need to control inventory from receipt through shipping and improve customer service.

- 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.

Use VISUAL BTS to eliminate data entry errors and improve efficiency.
Labor Barcoding

Infor VISUAL BTS helps you record the accumulation of direct labor hours expended against a work order, as well as the accumulation of indirect labor hours not specific to a work order. Infor VISUAL BTS offers two optional modules of barcode tracking: Automated Labor Tracking System (ALTS) and Wedge/PC Barcoding.

Automated Labor Tracking System (ALTS)

Infor VISUAL BTS offers you the ability to use radio frequency barcode readers to track labor transactions in real-time using the Automated Labor Tracking System (ALTS). Using the ALTS module and the Radio Frequency (RF) scanning system, you gain more control over the labor entry components in your system, improve accuracy, and promote real-time access of labor information throughout the company.

Wedge/PC Barcoding

The Wedge/PC Barcoding module uses an Infor VISUAL workstation attached to a wedge input device. You enter data via a barcode wand or laser gun and the PC keyboard. Entries appear directly on the PC screen, allowing you to view more extensive information than can be displayed on a simple entry device.

- Enter data quickly and accurately using a barcode wand or laser scanner and the keyboard.
- Track labor information instantly.
- Choose between single and multiple job modes, and define either a time or cost basis for prorating multiple jobs.
- Track clock in, clock out, indirect labor, and direct labor, including both setup and run information.
- Use integrated serial and/or lot number tracking (available as an add-on module).
ENTERPRISE PLANNING

Master Scheduling & MRP

The Material Requirements Planning (MRP) module assists you in managing the balance between supply and demand. 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 parts), 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 parts within the Master Production Schedule.
- Produce master schedules and forecasts for any level in the Bill of Material for any kind of part.
- 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.

Use VISUAL’s Material Requirements Planning features to ensure you have the parts you need to meet customer demand.
Advanced Material Planning

The Infor VISUAL Advanced Material Planning module helps you manage material requirements by showing summarized Supply, Demand and Forecast information. The Material Planning Window provides User defined time buckets of planning information. You can define the length of a time bucket to be 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 needed, the details are just one click away.

The Advanced Material Planning window displays user defined demand fences in different colors so you will know 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 released orders.

- Facilitate intelligent planning, viewing, and managing of parts 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.
- Master schedule planned parts 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 parts for a specified date range.
- Define Planning Bills of Material that include sub-assemblies for real or planned parts.
- Create alternate Master Production Schedule scenarios via Planning Forecasts.
- Identify multi-level part relationships and specify the percentage of each subordinate part to the parent.
- Generate MRP by independent warehouses; view supply and demand separately in these warehouses.

Use the Material Planning window to intelligently plan and manage your inventory.
VISUAL Project

If you are a project-based business or a professional services firm, Infor offers an Infor VISUAL Project solution that will have you managing with ease and accuracy. It’s time for you to take advantage of features that unite your project managers with integrated data for capturing costs, maintaining contracts and projects, handling long lead-times, and delivering on-time complex projects.

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. Project Management automates workflow, increases efficiency, and, most importantly, promotes customer satisfaction. This solution 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.

Use VISUAL’s Project features to manage your projects from request for proposal to delivery.
VISUAL Aerospace & Defense

Infor VISUAL Aerospace & Defense (A&D) solution expands the Project Management 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 retro-active 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.

Use VISUAL’s A&D features to easily manage your A&D customer’s complex requirements, track your costs, and maximize your profit.
SUPPLY CHAIN MANAGEMENT

Purchasing

Infor VISUAL allows you to easily coordinate material purchases by providing online decision support that simplifies record keeping. It helps you maintain control of inventory to enhance your company’s cash flow and shorten delivery times. Infor VISUAL handles all types of purchases, including inventoried items, supply items, outside service operations pertaining to a manufacturing order, and subcontracted items that require components being sent 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 materials directly to a job without having to assign internal part numbers.
- Link a PO line item to a specific job requiring that item.
- Issue materials to a work order when you receive items purchased directly to a job.
- Specify multiple parts and delivery dates on purchase orders, approved vendor lists for each part, and include the vendor’s and/or manufacturer’s part number for cross-referencing.
- Generate vendor RFQs (Request for Quote) that can be converted to a Purchase Order.

- Generate vendor purchase requisitions. Route requisitions through approval processes. Create Purchase Orders from approved requisitions.
- Use standard reports 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 part, product, or commodity.
- Book purchase accruals based on goods received from the vendor automatically.
- Maintain Blanket Purchase Orders, supporting multiple delivery schedules and shipping addresses.

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 components being sent to the vendor.
Inventory Control

Infor VISUAL gives you more control over your inventory by providing greater accuracy and immediate access to inventory information throughout the company. Infor VISUAL automates the process of tracking parts by adjusting inventory whenever you create a transaction involving a part.

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 you need a particular item. 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 situation for your parts. The extensive reporting capabilities of Infor VISUAL provide complete profiles of any part in the system.

- Assign comprehensive part definitions including variable length part numbers up to 30 characters long, extended part 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 a part and/or multiple locations within a single warehouse.
- Easily transfer parts between locations or warehouses.
- Issue materials by work order, operation, or sub-assembly automatically.
- Issue floor stock items automatically.
- 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.
- Print standard reports including sales and purchase history or an inventory report of FIFO with cost.

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

From the Inventory Control module, you also have the ability to perform Interbranch Transfers. An Interbranch Transfer (IBT) is an internal shipping document that allows you to accurately track the movement of part quantities between warehouses. Easy-to-use windows allow you to enter detailed shipping information, 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 parts and quantities.
- Enter, ship, and receive transfers quickly and easily.
- View and control IBTs in the Material Planning window.

Use VISUAL’s Interbranch Transfer modules to accurately track the movement of part quantities between warehouses.
Infor VISUAL’s Dimensional Inventory Tracking module provides you with an added level of control over your inventoried parts. Instead of simply seeing the total inventory quantity of the item, you can see the total quantity broken down by its various dimensional sizes. In addition, Dimensional Inventory Tracking allows you to issue a specified number of pieces by dimension and then lets the system calculate the correct total order quantity by making the necessary conversions.

Using Dimensional Inventory Tracking, any transaction involving a part causes all associated values to be immediately adjusted. This allows you to 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 part.
- 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.

Use VISUAL’s Dimension Inventory Tracking features to view your inventory by height, weight, and other dimension characteristics.
Lot & Serial Traceability

Infor VISUAL Lot & Serial Traceability module is designed for manufacturers who require more stringent control over product tracking. Lot & Serial Traceability provides this control by creating a trace record (known as a Trace Profile) for each lot number, serial number, or other grouping of a part, and by automatically tracking each part as it flows through your plant. You can assign additional information including a description, expiration date, and other user-definable fields.

Lot & Serial Traceability tracks the part ‘cradle to grave’, from receipt of materials from the vendor through delivery of the product to the customer, as well as all intermediate levels. As jobs move through the plant, operators are prompted for additional information when receiving and issuing material and reporting labor. Inquiry capabilities allow you to review the flow of material lots and serialized parts as they move through the manufacturing process.

- Customize part traceability requirements and specify special tracking requirements by part.
- Assign alpha and numeric properties to trace parts.
- 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 ten 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 used to produce the finished part. Cradle to grave traceability.
- Perform online inquiries by part for lot numbers and serial numbers received or shipped as well as inventory balances.
VISUAL QUALITY MANAGEMENT

Infor VISUAL Quality Management is a fully integrated enterprise quality management system that addresses quality assurance issues in specific areas of your operations. You can establish, track, and manage every engineering activity and supply chain expectation while supporting business growth and profitability goals. You can create critical manufacturing specifications for products, processes, equipment, and measuring devices, and improve enterprise team collaboration with vendors, customers, and employees. Quality Management provides tools to 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.

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

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 part 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.

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.

Use VISUAL Quality Management's robust set of control charts to maintain critical product specifications.
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.

Nonconformances (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.

Use VISUAL Quality Management to continuously improve your products and processes.
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 e-business strategy from product conceptualization to multi-site worldwide distribution with the manufacturing business process as the central point.

E-mail Integration

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

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.
FINANCIAL MANAGEMENT

**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 to journals.

Infor VISUAL Financials includes Accounts Payable, Accounts Receivable, General Ledger, Cash Management, and Cash Book, which fully integrate with Infor VISUAL and allow for the seamless transfer of information. This ensures 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—collectively 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.

- Multi-Graphical display options available for G/L review, including multi-level drill-down from 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.

- Create recurring journals, reversal journals, and rules based allocations.

- Post to multiple fiscal periods (including the future year), subject to definable controls.

- Post journals created in Infor VISUAL and Infor VISUAL Payroll to eliminate repetitive data entry and ensure data integrity.

- 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.

Use VISUAL Financials to accurately and efficiently address all of your enterprise’s accounting needs.
Accounts Payable

- 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 journal entries for Infor VISUAL Financials General Ledger as a result of A/P processing.
- Update miscellaneous charges to a work order and job cost information automatically in Infor VISUAL from A/P invoices.
- 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.
- Value added tax and duty reporting capabilities.
- Ability to record Landed costs and freight charges.
- Multiple means of identifying and drilling down for payment history; including Vendor Inquiry and Document Lifecycle views.

Link invoices directly to purchase orders for accurate payments.

Easily follow your purchases from purchase requisition to purchase receipt to payment.
Accounts Receivable

- Generate A/R invoices automatically from shipping activities in Infor VISUAL.
- Assign customer accounts to specific A/R control accounts on the G/L.
- Report customer prepayment 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 as a result of A/R processing.
- Share A/R customer payment and credit data with Infor VISUAL.
- Manage credit risk customers with Collection Schedules.
- Apply Collection Notes to provide diary-tracking capability for Credit Management.

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

You can view the quotes, orders, shipments, return material authorizations, and payments associated with the invoice.
Cash Management

• Predict future cash flows, based on actual trends, through the use of 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
  • Bank Reconciliation

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

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.

- Automatically update stockroom and WIP inventory records in real-time.
- Link POs to work orders to capture costs for a job.
- Link work orders to customer orders to measure true margins.
- Calculate actual costs for a one-time or limited run production without having to add part numbers.
- Directly charge jobs for expense items not listed on a PO.
- Create and post manufacturing journals to the General Ledger quickly and easily.

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

Infor VISUAL Global Financials is designed specifically to meet the requirements of companies operating multiple entities, divisions, sites, and subsidiaries around the world. It is a transaction-based business management tool that helps companies effectively handle customer and supplier relationships, as well as comparatively monitor business performance across various levels of an organization.

Infor VISUAL Global Financials enables companies to work within a multi-company and multi-currency environment with support for global consolidation. The application allows users to document all production and warehouse-related financial transactions and to segment financial data into appropriate entities for improved statistical and budget tracking and reporting. It 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 of your company’s accounting and cash management demands.

- Real-time processing of financial transactions.
- 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.
- Maintain customer and supplier relationships.
- Manage data security with a user-friendly inquiry system.
- Create Consolidated and Consolidating Financial Statements.
- Import/Export data through the Consolidation Process and/or Microsoft® Excel

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

Employee-initiated expenses can account for a surprisingly large percentage of total corporate spending. In challenging economic times, companies that can’t track, analyze, and control these expenditures are missing an important opportunity for cost savings.

Consider, for example, the cost of unnecessary travel, unauthorized purchases, unused discounts and rebates, honest expense report errors, and under-billed clients. Other hidden costs can include the time and effort spent on administrative duties related to accounting for expenses and payments, as well as outright fraud. Organizations that gain control over employee-initiated spending and automate expense-related processes can see dramatic benefits to the bottom line.

More than just an end-to-end travel expense management solution, Infor Expense Management enables employees to plan and expense business travel; request and approve payment requests; capture time for charging to projects and cost centers; and calculate paid time off and overtime. These integrated applications share a single, intuitive interface, making them easy to learn, use, and maintain. With Expense Management, the result is comprehensive control over employee-initiated corporate spending.

Infor Expense Management allows even complex, multinational organizations to automate expense-related business processes and enforce policy compliance, reducing associated administrative costs and decreasing the opportunity for accidental error and intentional fraud. With Expense Management, you can implement instantaneous global updates to policies and processes to support continuous improvement, while simultaneously managing local policies and statutory requirements.

Expense Management includes four core modules: Travel Plans, Reports, Payment Requests, and Timesheets. Each module features real-time policy notification, alerting employees to violations as they enter data and allowing them to provide explanations or make corrections before submitting plans or expenses; configurable workflow for alerting reviewers, obtaining necessary approvals, and then triggering events such as the issuance of plane tickets or the reimbursement of expenses; and business intelligence tools to analyze the solution’s database and search for opportunities to transform spending into savings.

These applications work where you do—in your office, on the road, and around the globe. They support multiple languages and currencies, work with all international date and currency formats, and enable you to apply rules and policies specific to independent divisions or geographic locations. Expense Management also accommodates country-specific per diem rates, local taxation requirements, variable VAT rates, and mileage rates.

Benefits include:

- Improve employee compliance with spending policies
- Lower administrative costs
- Increase savings through effective vendor negotiation and rebate usage
- Reduce unnecessary travel and purchases
- Reduce people needed to process documents
- Reduce manager time spent on approvals
- Increase accuracy of time billed to clients and paid time off due employees
- Higher amounts of foreign taxes reclaimed
- Increased efficiency through effective domestic and nondomestic VAT identification
- Reduced employee time spent on travel planning, expense reporting, time capture, and purchasing of goods and services
Multi-Entity Multi-Site

Infor™ VISUAL Multi-entity Multi-site has the flexibility to let you 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.

With Infor VISUAL, multi-entity 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. Infor VISUAL lets you control inventory, work in process (WIP), planning, scheduling, and costing for those sites from a single, centralized location.

With Infor VISUAL, 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 being able 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 parts 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 you only have to enter the component part IDs once, rather than five times. That means in real time with cost savings.

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 is at your fingertips whenever and however you need it. In addition, by centralizing payment of AP invoices and cash receipts for AR 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. You no longer have to create manual workarounds to account for these payments, and can manage the process 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 entity 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 allowed 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.

Choose reporting by site or entity.
PERFORMANCE
MANAGEMENT

VISUAL Business Intelligence

Infor VISUAL Business Intelligence (VBI) offers pre-packaged views, as well as in-depth customizable management views and reports that allow users 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. This allows managers to make more strategic and profitable business decisions.

By deploying VBI across their enterprise, companies can take advantage of complete OLAP (On-Line Analytical Processing), graphing, and reporting functionality. By manipulating and viewing shared multidimensional information, users 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, companies 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 the option of eDeployment; VBI’s Web Client offers full OLAP, graphing, and reporting functionality, which users can access via a network, the Web, or e-mail.
- Access key performance indicators and scorecards and drill down to specific information using an executive dash-board (Excel-based graphical display). VBI will automatically send e-mail 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.
- Eliminate time and cost creating and distributing reports; save money and focus on continuous improvement.

Use VISUAL Business Intelligence to develop key metrics that measure your success.
Management Reporting

Management Reporting provides powerful data access and reporting tools for Infor VISUAL and VISUAL Financials, allowing you to easily analyze and manage enterprise and accounting data. You can easily build customized queries and forms, define business graphics, and create complex cross-tabular reports. Additionally, the system’s throughput management tools help you to pinpoint resource contention, or bottlenecks, to improve your shop floor schedules, increase on-time delivery and improve profit.

- Define queries, reports, and forms with an easy-to-use graphical interface and point-and-click technology.
- Use report templates to simplify report building.
- Analyze data with a variety of built-in features.
- Define business graphics quickly.
- Access secure, enterprise-wide data.

Use Management Reporting to build custom reports to analyze the data you want to analyze.
VISUAL Microsoft® SharePoint Starter Kit

Microsoft® SharePoint is a powerful tool that allows you to share documents and collaborate with your co-workers. Now, you can incorporate information from your VISUAL database into your SharePoint site. You can also access your VISUAL programs directly from your SharePoint site.

The Starter Kit contains three VISUAL Web Parts: a menu Web Part, a chart Web Part, and a list Web Part. Infor provides the source code for each of these Web Parts, and you can use this source code as a guide to develop your own Web Parts.

- View metrics such as Top 5 Customers by Revenue, Delivery Performance, and Work Order Estimated vs. Actual Costs. The chart Web Part offers over 15 KPIs.
- View raw data from your VISUAL database with the list Web Part. You can choose from 15 list KPIs, such as Bookings vs. Shipments, Sales Bookings, and Vendor Price Performance.
- Drill back from the list Web Part directly to VISUAL.
- Filter the data so you view only the information you want to see.
- Access any VISUAL module from your SharePoint site with the menu Web Part.
- Use the Web Parts as a guide to develop your own Web Parts.
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 need 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.
Workflow

Infor VISUAL Workflow allows companies to automate their business processes, integrating policies and procedures with information flow according to predefined conditions or rules. 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. Workflow allows you 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 more lengthy 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.

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

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 e-mail. For example, you can automatically send an e-mail message to your customer when you ship their order. In addition to e-mail, 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 e-mail, Internet e-mail, user workstations, pagers, cellular phones, printers, and fax machines.
- Choose between multiple event types, including user-defined queries.
- Set up automatic database queries.
- Request status information on messages.

Use VISUAL Messages to automatically send important information to your customers, suppliers, and employees.
VISUAL Data Import Utility

The Infor VISUAL Data Import Utility (VDIU) provides a Bill of Material and Part import interface for third-party applications. Import operations, materials, parts and sub-assemblies and supporting bill of material information including specifications. The third-party applications must generate a properly formatted flat file (that follows Application Program Interface guidelines) to pass to the VDIU for import.

Users can run VDIU interactively or by command line from an external program. The VDIU will validate all fields, recalculate required quantities, and produce a log of all transactions during the import process.

- Link third-party applications with Infor VISUAL.
- Create Infor VISUAL engineering masters, work orders, and quotes from external data.
- Create new parts in Infor VISUAL from external data.
- Manage imported data with a program that validates fields, recalculates required quantities, and maintains a record of all transactions.

VISUAL Data Import Utility makes it easy to import Bill of Material and Part information from third-party applications.
Electronic Data Interchange (EDI)

Any organization that exchanges information can use Electronic Data Interchange (EDI), including enterprises involved in procurement/purchasing, finance, trade and transport, health, law, and revenue/tax collection. EDI 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 the EDI data and your Infor VISUAL software. This optional module works with your EDI software to import and export data between your Infor VISUAL database and the EDI application. You can import firm demand to customer orders, track cumulative quantities, and maintain fabricated and raw material authorizations. In addition, the customer order import allows you to automatically access and update pricing, units of measure, contact information, terms of sale, and ship-to information if needed.

- Create standard transaction 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 Part IDs to Infor VISUAL Part 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.

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

You’ll find several features throughout Infor VISUAL Enterprise that help you increase efficiency, find data, and customize your experience.

- VISUAL Search is a powerful search tool you can use to find information in your database. Enter a search term, and the system returns records from various modules that contain your search term. You can open records directly from the search results.

- Set up Macros to automate common actions that you perform again and again.

- Enhance your database records by adding documents and graphics directly to your records.

- Customize VISUAL windows with the Unify Object Nationalizer.

- Create your own menus and toolbars so you can access the third-party tools you use most often directly from VISUAL.

Use the VISUAL Search Bar to find information throughout your database.
ENGINEERING & ASSETS

VISUAL DesignLink

Infor VISUAL DesignLink works with applications such as AutoCAD® from Autodesk to seamlessly integrate your engineering operations with your manufacturing operations. This allows enterprises to maintain and retrieve engineering and manufacturing information from a single, accessible source, improving communication, eliminating data entry, and ensuring consistency.

With Infor VISUAL DesignLink, you can create a Bill of Material (BOM) or Parts List within an existing or new drawing, and then use that information to build an engineering master, work order, or quote within VISUAL Enterprise that includes both materials and operations required in the manufacturing process. It provides a dynamic link between information in the AutoCAD drawing and the Infor VISUAL database, allowing you to browse and add parts directly between the two applications.

Infor VISUAL DesignLink ensures control on the shop floor by allowing you to maintain and track engineering changes separately within Infor VISUAL without updating the original drawing. This allows you to modify designs at the shop level without changing the original design template.

- Allow engineering and manufacturing personnel to access the same design information within the context of their typical working environment.
Infor PLM Discrete

Sharing critical business information across the enterprise is essential for strategic product lifecycle management (PLM). But this requires organizing and managing data from many disparate systems, then making that data easily accessible to those who need it. Infor PLM Discrete helps leading manufacturers capture, share, manage, track, and store documents, tasks, and product information in a central data repository. By making information more accessible throughout the enterprise, PLM empowers these companies to work better and faster, increasing operational efficiency.

Everyone in your company will benefit from Infor PLM Discrete, from individual users, to managers, and executives—spanning purchasing, production, engineering, customer service, senior management, and finance. At the user level, it prevents errors by eliminating confusion about which version of a document or design is the latest. At the managerial level, it provides transparency on the progress of projects, ensures improved access to information and better decision-making prevents delays, reduces costs, and boosts efficiency. The solution also facilitates global collaboration and communication, as well as document vaulting and change management.

Companies react more reliably and profitably with streamlined and repeatable business processes, accurate information, and smarter decisions. Whether in PLM, CAD, or ERP, you’ll benefit from role-based access to relevant, accurate PLM, quality, and operational data. When combined with integrated workflows and programs, you’ll better respond to bids and minimize time to market for standard or configured products.

As time and cost pressures skyrocket, you must consistently react with accurate costs, better quality, and greater profitability. From assessing the feasibility of initial requests to broad and deep validation of incoming CAD files for identifying version or date mismatches to assessing the impact on inventory, production, and sales, Infor PLM Discrete provides access to more information, deeper validation, and better change control. Informed decisions, combined with automated approvals and standard integration to VISUAL, streamline the process—without increasing risks or costs.

- Vaulted document management
- Document version control
- BOM revision control
- Workflow collaboration
- Engineering change notices (ECN)
- ECN approval process workflows
- Security by project, user profiles & roles
- Drawing viewer
- Design “What-ifs”
- BOM Comparisons
- Optional CAD integrations
- Vendor collaboration

Infor PLM Discrete provides access to more information, deeper validation, and better change control.
Plant & Equipment Maintenance

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. The unplanned maintenance records urgency and escalation as well as cause and remedy for the unexpected maintenance.

You use the same tools for labor reporting, material planning for spare or replacement parts, purchasing, inventory control and scheduling as you do for production. This prevents having to learn another system to perform maintenance and reduces the learning curve and acceptance of the maintenance system.

- 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 parts 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.

Use VISUAL’s plant & equipment maintenance to schedule maintenance tasks seamlessly with your production schedule.
Infor Enterprise Asset Management (EAM)

Infor Enterprise Asset Management is an advanced asset management solution for organizations that 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
HUMAN CAPITAL MANAGEMENT

Human Resources

Infor VISUAL Human Resources is a comprehensive data management and reporting tool. It maintains vital data about applicants and employees and provides numerous standardized reports. The flexibility of Infor VISUAL Human Resources allows you to track as much or as little information as you require.

Because of its dynamic integration with Infor VISUAL Payroll, the shared data between the two applications eliminates the need for repetitive data entry, and ensures consistency and accuracy.

- Record and track job postings, applicant information, interview notes, and results.
- “Hire” an applicant to automatically create an employee record in Infor VISUAL Payroll.
- Track Time Accrual balance by employee, including automatically triggered increments, and reduction from Infor VISUAL Payroll payments.
- Record and track employee performance, education, salary, attendance, seniority, and grievances.
- Report and track accidents and workers’ compensation claims.
- Attach and preview files from several tracking screens and gain convenient access to critical information.
- Use consignment tracking to monitor assigned company property.
- Improve overall corporate awareness and provide a better level of service to your workforce.
- Grant level of security access by processor.
- Create or modify user-defined reports and queries through Report Builder and/or other third party report writing/OLAP tools.

• View, print, e-mail, or export data from an assortment of standard reports.

Use VISUAL Human Resources to manage your current workforce and prospective employees.
Infor VISUAL Payroll is a sophisticated payroll processing and reporting system. It is fully integrated with Infor VISUAL, VISUAL Financials, and VISUAL Human Resources. Information can easily be transferred between these modules eliminating the need for repetitive data entry and ensuring the integrity of your data.

Infor VISUAL Payroll supports all federal and state taxes and includes state-of-the-art functionality such as direct deposit, 401(k) plans, electronic tax and wage garnishment remittance using ACH or EFTPS payment systems, magnetic media tax filing, and sophisticated report sorting and timing features.

- Import labor ticket entries from Infor VISUAL, including proper breakdown of shift differential and overtime hours.
- Create templates for standard earning and/or deductions to reduce data entry and input errors, and ensure accuracy.
- Correct input errors during processing, without disruption.
- Define company 401(k) plan(s), establish automatic deductions by employees, and automatically accrue 401(k) company matches.
- Track company and/or 401(k) loan balance and apply payroll withholdings to debt repayment.
- Set up electronic payments and use ACH or EFTPS to generate tax and wage assignment payments rather than issuing paper checks.
- Issue tax, assignment, and garnishment payments.
VISUAL Time & Attendance

Infor offers a time and labor management system: Infor VISUAL Time & Attendance. Available in a limited license and full-scale offering, you can track employee attendance, manual time sheets, and manufacturing labor. You can configure each data collection station 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 VISUAL Payroll or other third-party payroll processors.

Track the employee information you want to track; hourly workers, pieceworkers, and both exempt and non-exempt salaried employees. Employees may be defined to enter a timesheet instead of the Infor VISUAL Time & Attendance’s standard clocking functionality.

- Enable supervisory electronic time approval with electronic signature capabilities prior to calculating employee earnings.
- Create extensive audit trails and employee information histories upon edits to time entries.
- Take advantage of paperless manufacturing labor data collection, through the use of multiple types of hardware and direct interface to labor tickets.
- Define holiday and payroll frequency calendars, and use auto-clock functionality to define breaks and meals, as well as grace periods, then specify whether they are paid or unpaid.
- Generate standard work schedules based on shift definition parameters with the ability to update generated schedules automatically.
- 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.

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

Infor EPAK for VISUAL

Getting and keeping employees trained on all your business processes and systems is no easy task. Like most companies in the current economy, you’re trying to do more with less—and the pressure on your employees to get things right, the first time is greater than ever. Add in new regulations that force you to adhere to strict compliance standards, and the need to document and capture critical business processes becomes even more critical.

The Infor Enterprise Performance Accelerator Kit (EPAK) can help you meet these challenges, so you reduce costs and errors and recognize ROI more quickly.

EPAK is a collaborative content development platform that drives end-user and project team productivity throughout all phases of the software ownership lifecycle. EPAK pre-built application specific content provides significant additional benefit beyond the EPAK Developer for organizations deploying Infor’s applications.

Key to the value of EPAK application specific content is that it is authored in tight collaboration with the consultants in the field that are implementing these applications every day, thus creating content which accurately reflects industry best practices with detailed conceptual information.
Infor KnowledgeZone

For nearly a decade Infor VISUAL customers have turned to the KnowledgeZone to help with their training requirements in:

- Implementation
- Migration to new software
- Upgrading to new versions
- Employee turnover
- Cross-training and retiring
- Expanded use of software

A KnowledgeZone subscription gives your people unlimited access to ALL our training materials and classes for all versions of your product for a full year. This includes a wealth of instructor-led and self-study training material:

- Training guides
- Online recorded classes
- Live instructor-led online classes

Your users can download all the training guides, attend all instructor-led classes, and take all the on-line recorded courses as often as they wish, 24x7, for the duration of the subscription. The subscription includes all existing and forthcoming materials and courses. KnowledgeZone helps your project team members, daily end users, and super-users:

- Preview the software
- Prepare for on-site consulting or training events
- Remember and expand on what they’ve learned
- Get help and cross-train long after the official training is over

In addition, may IT departments use the KnowledgeZone to offload routine training questions users need answers to while on the job.

It is often unrealistic to send people to one class and expect them to be trained. Training takes time and repetition. Furthermore, attending a whole-day or multiday class might not only be inefficient, but also unfeasible. The KnowledgeZone provides training that is:

- Available round-the-clock
- Requires zero travel
- Delivered in a variety of formats
- Broken into segments so you can focus on only the portion you need.
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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