



---

**320 Carleton Avenue  
Suite 6200  
Central Islip, NY 11722  
631-665-2050  
[www.synergyresources.net](http://www.synergyresources.net)**

# SYNERGY VISUAL WORKSHOP

## VISUAL WORKFLOW

[CLICK HERE TO REGISTER](#)

### WORKSHOP TOPIC:

Infor VISUAL ERP Workflow is a business process management tool that allows information to pass from one person or department to another through a process cycle.

### WHY USE:

Workflow allows you to define your business processes and procedures and have VISUAL maintain and enforce those processes and procedures.

### WORKSHOP DESCRIPTION:

During this session attendees will learn how to:

- Define and enforce business rules in various areas of VISUAL.
- Display pop-up messages to the User informing of a condition within the record they are saving.
- Disallow a save of a record and return a user-defined message.
- Assign a VISUAL task to a user for approval.
- View the status of a Workflow via the Workflow Tracker.

### WHO SHOULD ATTEND:

VISUAL Administrators, VISUAL Super-Users

### LEARNING OBJECTIVES:

Learn and understand the concepts in constructing a basic Workflow.

### WORKSHOP PREREQUISITE:

The customer must have a recent copy of their DB restored to a test environment. This environment must be accessible by both the instructor and attendees.

The customer must also have access to the Workflow Designer (found from the Admin dropdown menu in VISUAL).