

Posity Neo User Manual¹

General introduction to using Posity Neo applications

Valid from Posity Neo version 2024.2.15.1 or later.

This user guide explains the general concepts and capabilities that apply to each Posity application. For application-specific information, please refer to the relevant application documentation.






¹ This document is available in the following languages:

- German: https://www.osity.com/DE/Documents/PosityNeoUserGuide_de.pdf
- English: https://www.osity.com/EN/Documents/PosityNeoUserGuide_en.pdf
- French: https://www.osity.com/FR/Documents/PosityNeoUserGuide_fr.pdf
- Italian: https://www.osity.com/IT/Documents/PosityNeoUserGuide_it.pdf

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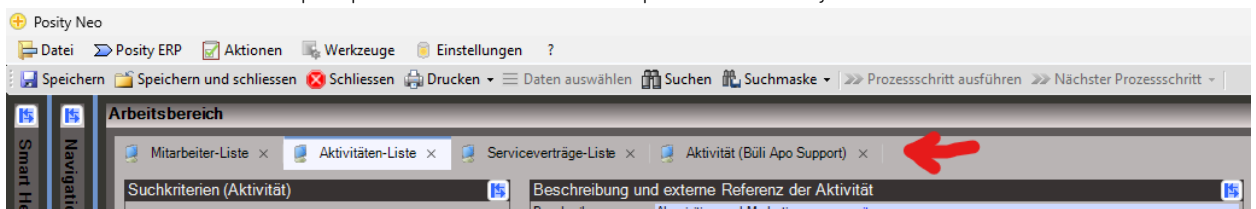
1 Installation, Registration & Overview

1.1 What's new about Posity Neo?

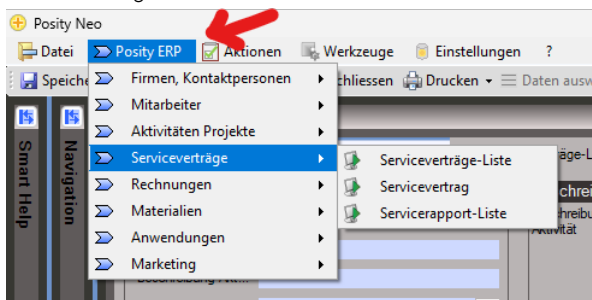
The following list briefly lists the most important changes in the new version:

- **Multi-platform capability, new and modern basis for the future:** Posity Neo uses the new .NET Framework (Core) from Microsoft. This means that Posity Neo can be run on Windows, macOS, iOS and Android operating systems in the future. Currently, only the Windows operating system is supported. By switching to the new technology, Posity Neo is once again equipped for the next decades. This lays the foundation for long-term development. Although this change is currently without any major, noticeable effects, this is the "biggest" change that has been made with the new version.

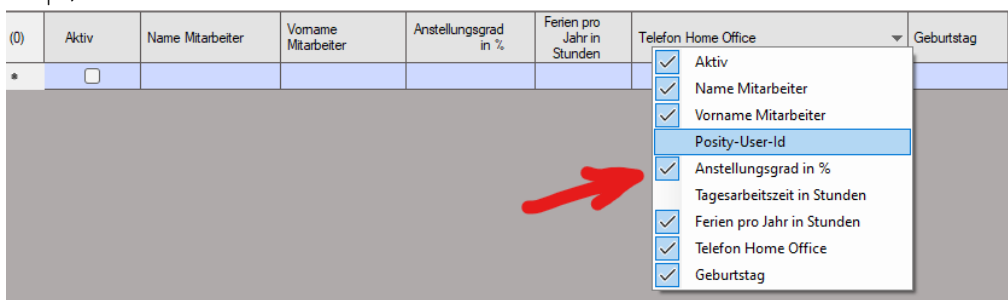
- **Running workflow tabs:** The active workflows are displayed as tabs in the workspace. This makes it possible to switch between open processes in a clear, simple and fast way.



- **Workflows as normal menu items:** In addition to selecting a workflow in the tree, this can now also be done via the menu. If desired, this allows the tree of the navigation area to be collapsed and the work area to be enlarged.

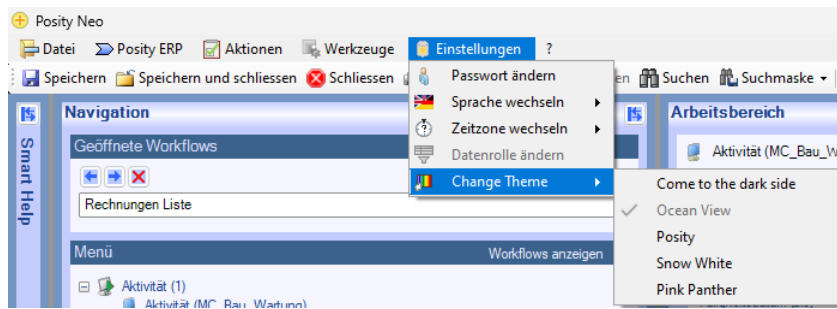


- **Configure lists:** Individual columns can now be shown and hidden in lists. To do this, right-click on the list header and select the desired columns (you can change the order of the columns as usual with "drag and drop").

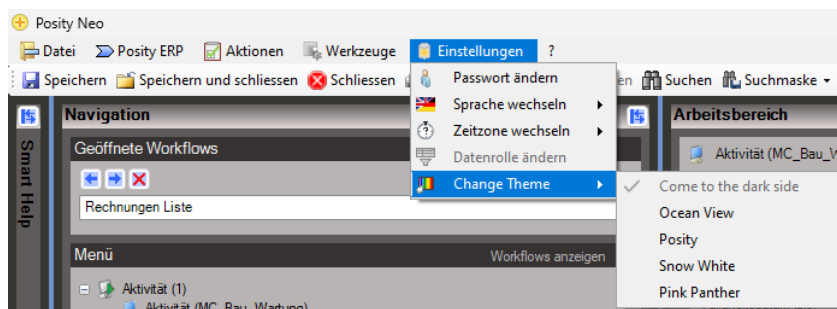


- **Themes/Color Schemes:** For each environment, you can now select a desired setting from a list of predefined color schemes. Below are two examples.

Ocean View:





Come to the Dark Side:



1.2 Installation and updates of Posity Neo

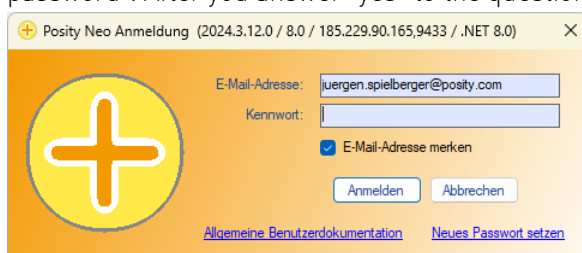
First time start: If Posity Neo is started on a PC for the very first time, the start must be carried out via the homepage www.posity.com. To do this, click on "Start Posity Neo" on the homepage. After you accept the Windows security questions, Posity Neo will be installed automatically. If you're having trouble getting started, see the Startup Help document for more help.

Normal start: After this initial installation, Posity Neo can be started directly, without having to go through the homepage. To do this, search for Posity Neo among the apps listed in Windows (press the Windows logo key ), or press the Windows logo key  and type directly "Posity Neo" (Windows search field).

Updates: New versions of Posity Neo and changes to your application are distributed fully automatically. Posity Neo automatically ensures that you always have the latest version installed. The changes will be distributed each time Posity Neo is restarted. You should therefore restart Posity Neo regularly (e.g. daily).

1.3 Login, change password, test server connections

First time login: If you want to log in to Posity Neo for the first time, you don't have a password yet. You will need to have an initial password sent to you by email. Just enter your email address and then press "Set new password". After you answer "yes" to the question, your password will be sent to you by e-mail.



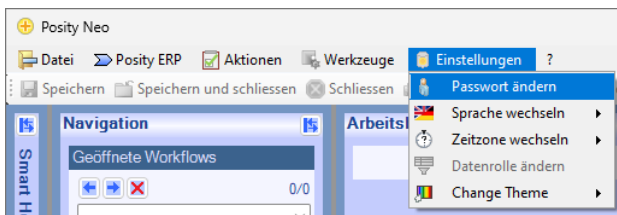
Login: Enter your email address and password. If you activate the "Remember e-mail address" option, your e-mail address will be automatically filled in on this PC the next time you start it.

Language: Since it is not yet known which user is logging in during the login process, the login process is usually carried out in the same language as that of the operating system or the browser (in the picture above in German).

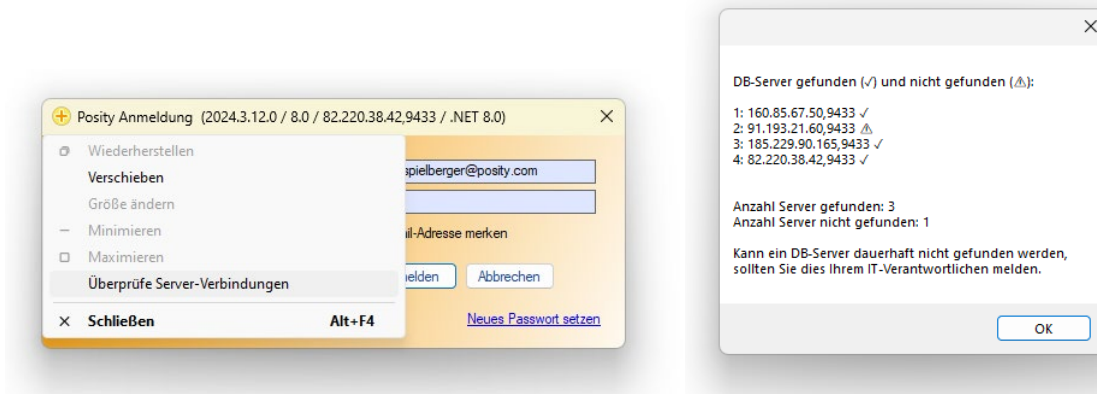
General User Guide: You can open this General User Guide in your standard browser by clicking on the "General User Guide" link.

Forgot your password: Enter your email address and click on "Set new password". You will receive an e-mail with your new password.

Change password: You can't change your password until you've started the application. Click on "Settings" in the menu and then on "Change password" (see image below). The new password is valid immediately.



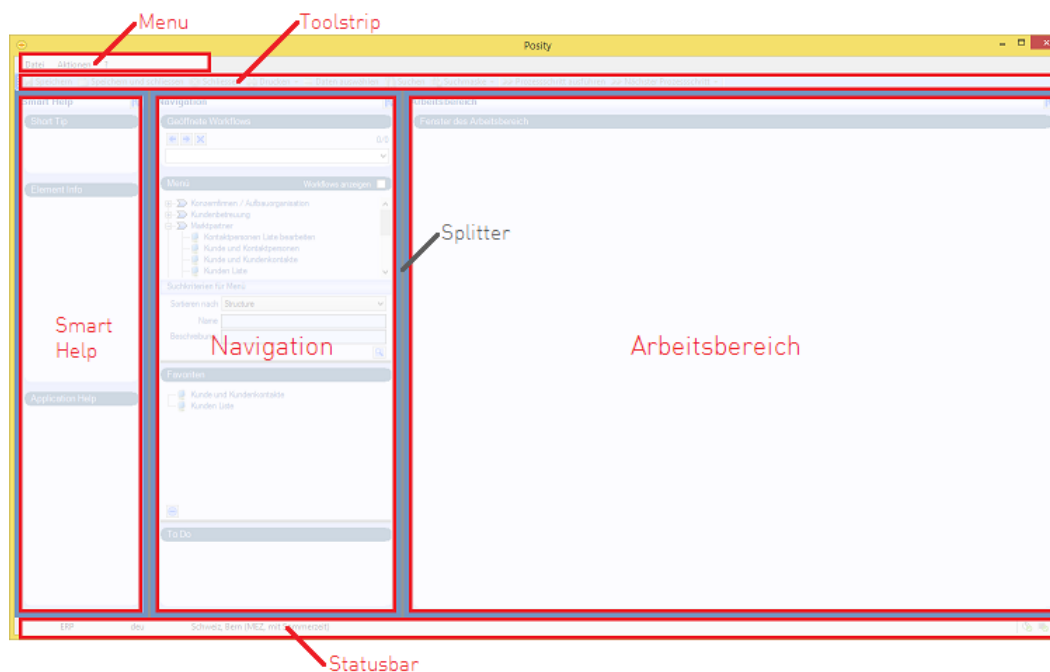
Test server connections: To check if you can successfully connect to the Posity servers (settings in your firewall may restrict access), click on the Posity logo in the login screen (top left) and select "Check Server Connections". It may take a few seconds to get the evaluation. The answer will then tell you whether you can connect to all login servers (see 2nd image). In the example, the server 91.193.21.60 cannot be reached.



Alternatively, you can also click on the login button with the shift key pressed. This has the same effect.


1.4 Basic structure of the application

Every application created in Posity Neo has the same application structure. This structure is shown in the picture.



The application structure consists of **6 areas**:

- **Menu:** The menu lists the most important and frequently used functions.
- **Toolstrip:** In the toolstrip, the most frequently used functions are directly available.
- **Smart Help:** Provides further information on the "Navigation" and "Workspace" sections
- **Navigation:** Used to select and search for the desired process (e.g. «Manage customer»). The same processes can also be selected from the menu.
- **Workspace:** This is where the actual information is captured and processed. If multiple processes are open, a tab is displayed for each process.
- **Statusbar:** Provides up-to-date information on the health of the application and current activity.

Resizing: The size of the individual areas can be adjusted vertically and horizontally by moving the gray bars, the so-called splinters. These resizing changes will be saved and restored the next time you start Posity Neo. The "Smart Help", "Navigation" and "Workspace" areas can also be closed and reopened completely. This can be done by pressing the button in the  upper right corner of the respective area.

The following chapters describe in detail the possible actions in these areas. If you just want to get a short introduction, you should read the "Navigation" and "Workspace" sections.

You can also start Posity Neo multiple times on the same PC (instead of starting two or more processes multiple times). This gives you the option of viewing and editing the data displayed in the workspace from different processes at the same time, or copy-pasting it.

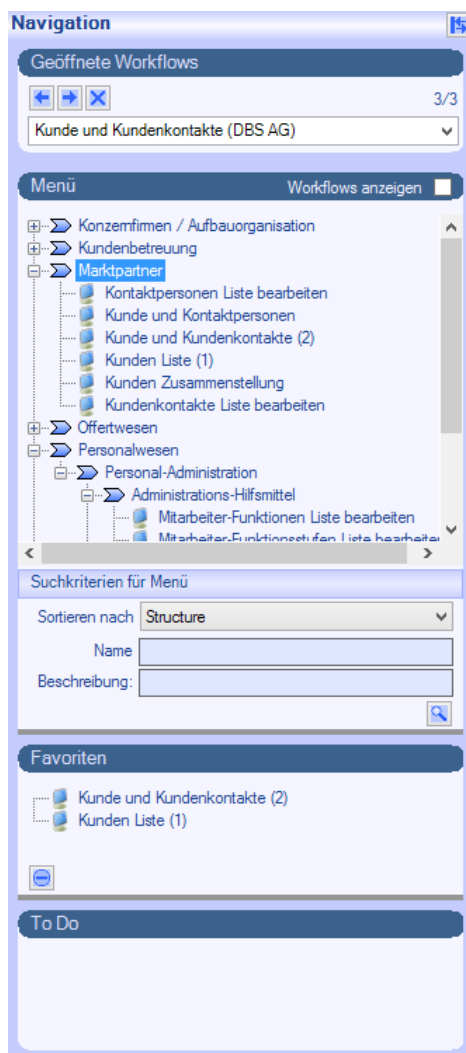
2 Navigation


2.1 Access to the application's processes

The navigation pane allows you to access the processes (functions) specific to your application, e.g. the "Customer and contact persons" process. Alternatively, you can use the menu system (see chapter «2.3 Access via menus»)

You can open as many processes as you want in Posity Neo in parallel (you can also start Posity Neo itself multiple times), edit it, and jump back and forth between them. In this way, you can also let processes that have a long response time (e.g. a complex calculation) continue to work in the background and continue to work in other processes. If an unexpected error (crash) occurs in one process, you can close that process without compromising the other processes.

2.2 Access via navigation area




- **Open Workflows:** Allows you to jump back to processes that are already open. Use the arrow keys to jump forward and backward through the already open processes. With the drop down box, you can jump directly to the desired process.
- **Menu:** Here you can open new processes. The number in parentheses after the process indicates the number of times the process has currently been opened. In the example, the available processes are shown in a hierarchical structure. This list can also be viewed as a simple, sorted list. To do this, select "Name" under "Sort by". You can also search for a process by entering part of the name of the process you are looking for under "Name" (similarly, you can also search for the description) and then press the search magnifying glass .

If you check the box next to "Show workflows", the open processes will also be displayed in the menu:



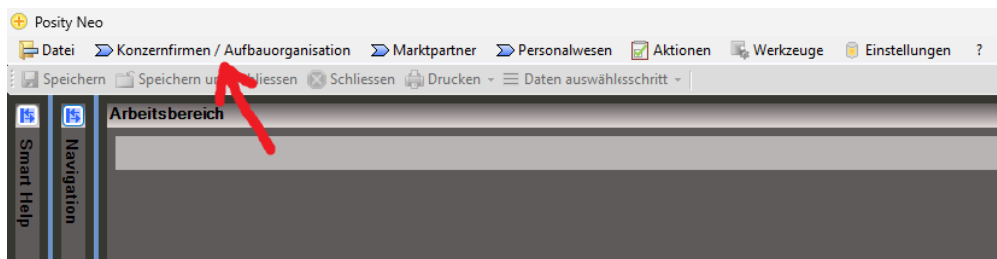
- **Favorites:** Processes that you use frequently can be placed in the Favorites section to open them directly. To do this, drag and drop the desired process from the menu to the favorites area.
- **ToDo:** Applications can have processes that automatically appear in the ToDo section. These processes appear in the ToDo area when data is available that needs to be processed by these processes. For example, there may be a request for quotation that needs to be processed.

The  button within the "Open Workflow" section has a special function. This allows you to forcibly terminate the currently open process (the rest of the processes will not be affected). The process terminates immediately, regardless of the current state. For example, it is no longer checked whether there is still unsecured data. You should therefore only use this button *in exceptional cases*, e.g. if you have accidentally triggered the printing of a long list, or if the process has "stalled" due to problems. However, do not use the button if you want to close a normal process, always use the close function.

2.3 Access via menus

The processes can also be accessed via the menu system (see also «4 Menu»). The processes will then appear from the 2nd position. The sequence and structure depends on the definition defined in the application and naturally differs from application to application.

Behind the last process, the four menu items "Actions", "Tools", "Settings" and "?" appear. It is not possible to set favorites in the menu system. To do this, the navigation pane must be used.




3 Workspace

The workspace is where the actual data of the application is processed. Here you can, for example, enter and change customers and orders or create invoices. The representation within the workspace varies greatly from process to process. Nevertheless, they have things in common, which will be explained here.

3.1 Representation of the workspace

The display of the workspace dynamically adapts to the available space. If space is limited, individual elements (e.g. Group Box) are no longer displayed next to each other, but below each other.


Group boxes and their elements can be hidden by clicking on . This gives the surrounding elements more space for their display and allows the user to hide unimportant things for him. Whether a Group Box is hidden or not is saved for the user in their individual settings. When viewing the same view, these settings are applied again.

In lists, you can change the display.

- You can change both the **order** and the **width** of each column. These adjustments are saved for the current PC and are used again the next time the process is called. In the menu, you can restore the original settings ("Reset GUI user settings").
- In lists, you can sort the data by clicking on the column name. A triangle in the column name then indicates whether the data is sorted in ascending or descending order. These sortings are temporary.
- Individual columns can be shown and hidden **in lists**. To do this, right-click on the list header and select the desired columns. These adjustments are saved for the current PC and are used again the next time the process is called.

(0)	Aktiv	Name Mitarbeiter	Vorname Mitarbeiter	Anstellungsgrad in %	Ferien pro Jahr in Stunden	Telefon Home Office	Geburtstag
•	<input type="checkbox"/>						


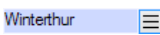
Aktiv
 Name Mitarbeiter
 Vorname Mitarbeiter
 Posity-User-Id
 Anstellungsgrad in %
 Tagesarbeitszeit in Stunden
 Ferien pro Jahr in Stunden
 Telefon Home Office
 Geburtstag

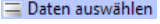


3.2 Referenced data

If you process data, e.g. the data of an order, so-called referenced data often occurs in it. For example, the client is defined in the order, but the client is not stored in the order itself, but in a separate table. In the table of the order, only a reference to the client is stored (the client must have been saved beforehand for this purpose).

In Posity Neo, these references can appear in three variants in the workspace:

- As an input field with a drop-down button with a double down arrow at the end of the field: 
- As an input field with a browse button at the end of the field: 
- As a cell in a list. The column headers of these cells are highlighted in yellow.

In all three variants, you can double-click on the relevant field, F3 (function key 3), or click on  in the tool strip to open a dialog with which the desired data can be searched. You have the same effect when you press the browse button in the input field. If you press the drop-down button, all possible references will be presented in a list for selection (this variant is therefore only suitable for cases with few possible references).

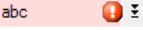

For all three variants, you also have the option of entering the designation directly. If the input is correct, the referenced data is copied. If the input is incorrect, the search dialog is automatically displayed.


3.3 Cursor Concept

Posity Neo has integrated a cursor concept to optimally support the work. The basic idea here is that Posity Neo always remembers which data of a particular table was selected last. If, for example, a certain line is selected in a list of customers, Posity Neo remembers which customer has been selected. If a process is then opened to edit an individual customer, that customer is automatically used. This also works if an offer from a specific customer is opened (and the customer is displayed in the offer). If the process for editing an individual customer is then reopened, the customer of the quotation is now used.

A common way of working is, for example, to open the list of customers, click on the customer you want to edit in the list and then open the process for editing the customer. Of course, you can return to the list, click on another customer, and reopen the process to edit the customer.

3.4 Tooltips and bugs

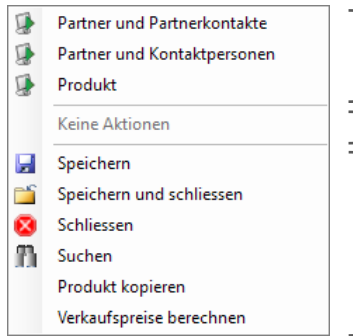
If you move the mouse over an input field, a tooltip appears after a short time (if a text has been entered), which provides further information about the input field. If the input in the field is not valid, the input field is highlighted in red and an exclamation mark appears at the end of the field: . If you hover your mouse over the exclamation mark, the tooltip will tell you about the nature of the error. If it is a mandatory field in which no data has been entered, a red triangle will appear in the upper left corner: .

In the case of numeric fields, the display format is defined, which determines, among other things, how many decimal places a number should be displayed on the screen. Now, it can happen that the number actually has more decimal places than are displayed. In this case, the displayed number is rounded to the number of digits specified by the display format. You will be informed about this process by a green triangle in the upper left corner: . If you hover your mouse over the triangle, the tooltip will tell you about the original value of the number. The original value is the value that is stored in the database.



3.5 Context menu (right mouse button)

Another way to navigate to a process and trigger actions is to use the context menu. It can be opened with a right-click anywhere in the workspace. Based on the current data in the workspace and the available cursors (see «3.3 Cursor Concept»), the menu items are compiled and divided into 3 menu areas:



1.) Possible actions for a field or a selected record when right-clicking on a field or record in a table.

2.) All possible actions with all cursors set.

3.) Actions from the tool strip (see «5 Toolstrip»).

Hints:

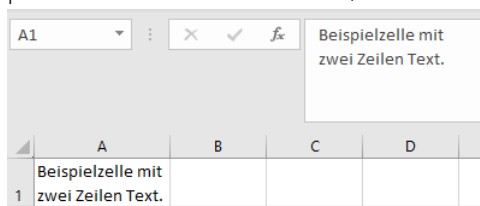
- If no actions can be found for a menu area, an entry "No actions" is displayed in this menu area.

3.6 Copy&Paste data to and from Excel sheets

You can copy data from tables to Excel in Posity Neo, or copy data from Excel to Posity Neo tables. To do this, select the area to be copied in Posity Neo or Excel, copy the data to the clipboard (e.g. with Ctrl + C), place the cursor in the upper left corner of the target area (select the whole cell, but not the cell contents) and then paste the data (e.g. with Ctrl + V).

When copying Excel to a Posity Neo spreadsheet, the following conditions apply:

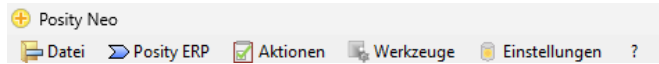
- If the target table in Posity Neo has too few rows to accommodate all copied rows (from the target range), so many rows are automatically generated at the end that the entire copied area has space.
- If the target table in Posity Neo has too few columns to accommodate all copied columns (from the target range), the overlapping columns are ignored and the data is discarded.
- If there are columns in the target area of Posity Neo that cannot be changed (read-only), then they will not be filled and the next column will be filled with the next column from the area to be copied (i.e. the column from the area to be copied will be skipped).
- If a single cell to be copied has multiple lines of text (the text contains line breaks) or if the cell contains tab characters, then the contents of the cell are enclosed in " characters (quotation marks): **"Example cell with `CR LF` two lines of text."** (CR LF marks the line break and is usually invisible). This behavior is the expected default in Excel and Posity Neo when copying and pasting. As a result, multi-line text content can be transferred correctly. If you don't want this behavior, you can prevent it with Shift + Ctrl + C, or Shift + Ctrl + V in Posity Neo.



- If a processing is triggered in a Posity Neo table when the line is changed (e.g. certain data from the database is read and displayed, or calculations are performed), no range can be marked in the table. This means that copying the data to Excel is not possible in these cases.

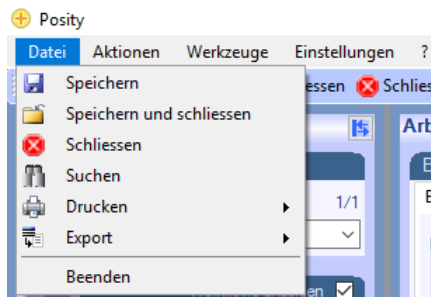
4 Menu

The menu has six main items: «File», Processes, «Actions», «Tools», «Settings» and «?».



Attention: Please note that not all menu items are visible to every user. It depends on the rights of the respective user which menu items are effectively visible.

4.1 File



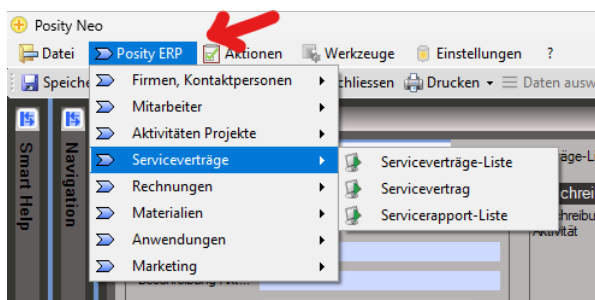
Under "File" you have the following options:

1. Save
2. Save and close
3. Deduce
4. Search
5. Print
6. Export
7. Finish

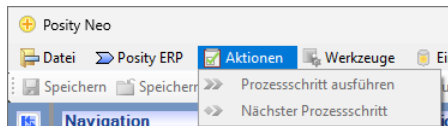
The first four points are directly related to the workspace. Only if this process supports the corresponding action is it active in the menu. Printing and exporting are discussed in the following two chapters («4.7 Print» and «4.8 Export»). The last menu item "Exit" closes all active processes and closes Posity Neo.

4.2 Processes

The processes appear from the 2nd position. The sequence and structure depends on the definition defined in the application and naturally differs from application to application.



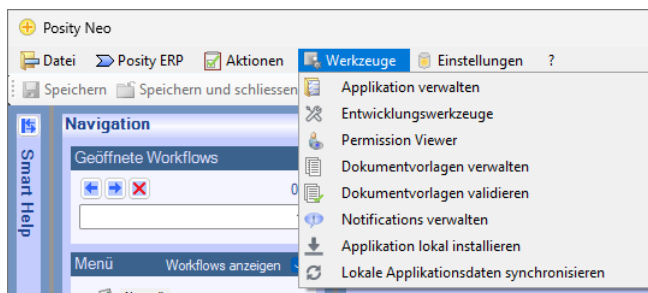
4.3 Actions



Under "Actions" you can jump forward or backward a process in the current workflow (if the process is embedded in a workflow): "Execute process step" and "Next process step".

Under this menu item, you can list additional actions that the application itself provides.

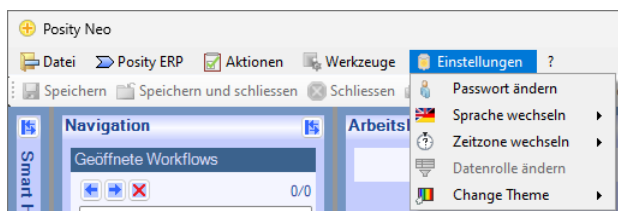
4.4 Tools



Under "Tools" you will find the following actions:

- «Manage properties»: Here applications, environments, users, rights and much more can be managed. Whether you see this menu item and which settings you can actually make depends on your rights. However, this menu item is only available for experienced Posity Neo users.
- «Permission Viewer»: see chapter «4.9 Permission Viewer / Role Concept».
- «Managing Document Templates» and «Validating Document Templates»: see chapter «4.10 Manage and validate document templates».
- «Manage notifications»: Here you can manage messages that should be displayed to the users of Posity Neo, see chapter «4.11 Manage Notifications».
- «Install application locally»: Applications can also be operated locally in offline mode (e.g. if access to the Internet is not possible or restricted). Creates a local version of the current application and environment. The exact framework conditions and the procedure are described in a separate document.
- "Synchronize local application data": If you have changed data in a local version of the application, the changes to the data can be transferred to the server. The exact framework conditions and the procedure can be found in the chapter «11 Installing Posity Neo for offline mode» described.

4.5 Settings

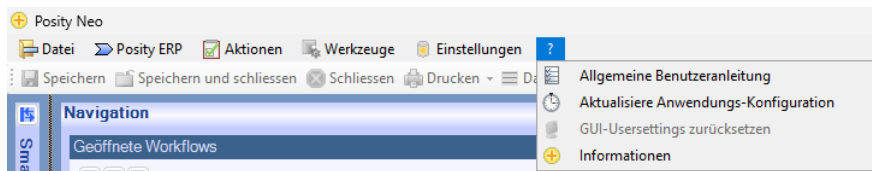


Under "Settings" you will find a lot of setting options (not all menu items are visible to every user. It depends on the user's rights which menu items are effectively visible):

- «Change password» (see «1.3 Login, change password, test server connections»)

- "Change language": If an application has been created in several languages, the desired application language can be selected here. Caution: This does not change the languages set for the user and is therefore only active for the duration of the session.
- Change time zone: Here you can select the time zone for which a date and time should be displayed, or in which you want to record it. Again, this setting does not change the time zone set for the user and is therefore only active for the duration of the session.
- Change data role: Data visibility can be restricted to specific data roles. You'll only see the data that matches your data roles. If you have more than one data role, you can change the data role in which newly created data is stored.
- Change Theme: Here you can select the color schemes (themes) of Posity that you would like to use. If you are working in multiple environments (e.g. production and testing), you can set the color scheme for each environment. This allows you to immediately see in which environment you are working.

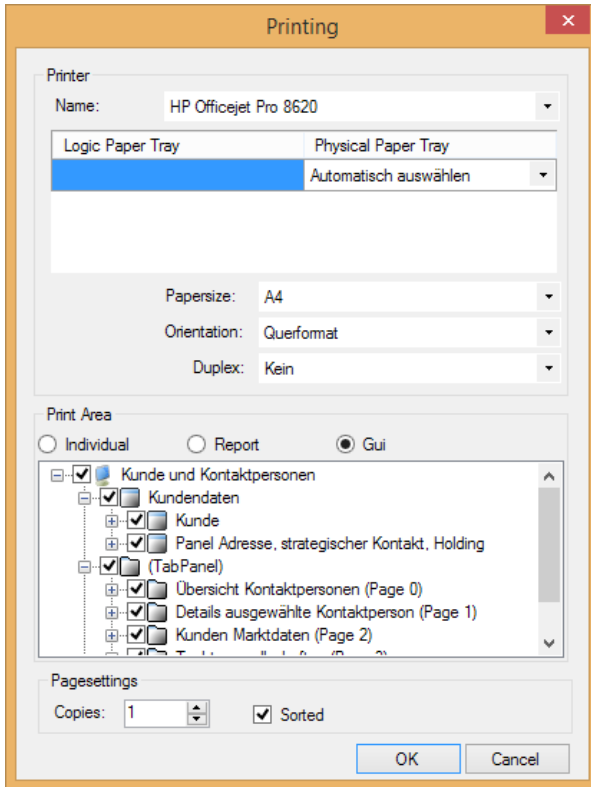
4.6 ?



Under «?» you will find the following menu items:

- «General User Guide»: Opens your default browser and displays this document (in PDF format).
- «Update Application Configuration»: Changes to applications created in Posity Neo are automatically distributed. If you want to force an update (e.g. because the automatic distribution was not successful), you can use this menu item.
- «Reset Gui User Settings» (see «3.1 Representation of the workspace»)
- «Information»: Here you get an overview of the application (version, languages, etc.), the user, the servers used, as well as the currencies and currently used exchange rates.

4.7 Print

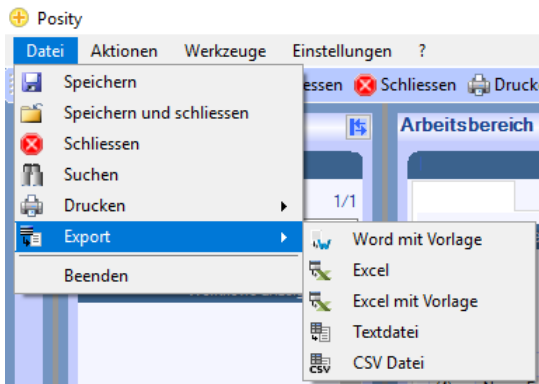


Firstly, the print function in the menu (" → Print file") is a standard print output of the current workspace. You can choose between three basic variants (radio boxes in the Print Area).

- «Individual»: You can individually define for each area, list and field whether it should appear on the result or not.
- «Report»: uses the values set by the developer, which data will appear on the printout.
- «Gui»: prints the workspace as it appears in the Gui.

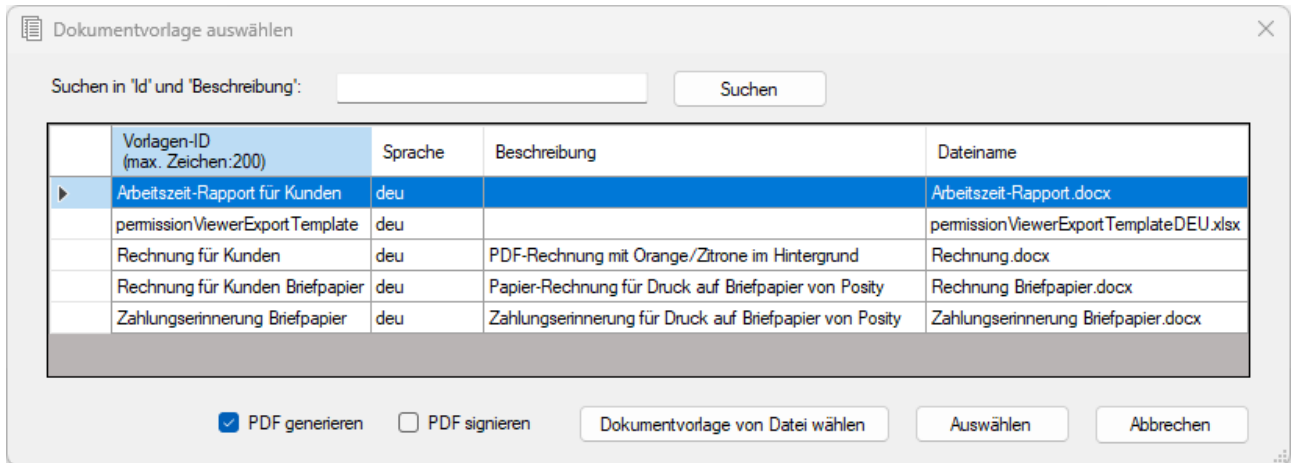
Secondly, specific reports can be defined in the process (not to be confused with the Word and Excel templates). If this is the case, they will also be displayed in the print dialog for selection.

4.8 Export



The data in the workspace can be exported in four ways. All data of the current process (GUI) is exported to the generated document:

1. **Word and Excel with templates:** In Word and Excel, templates can be created into which the data of the is exported. For example, offers, orders, invoices, lists, serial letters can be created in the highest quality. The creation of these templates is described in a separate document. You can either put these templates on any disk, or you can store these templates in Posity Neo itself. In the latter case, all users have easy access to these templates from anywhere. How to manage these templates is described in the following chapter.

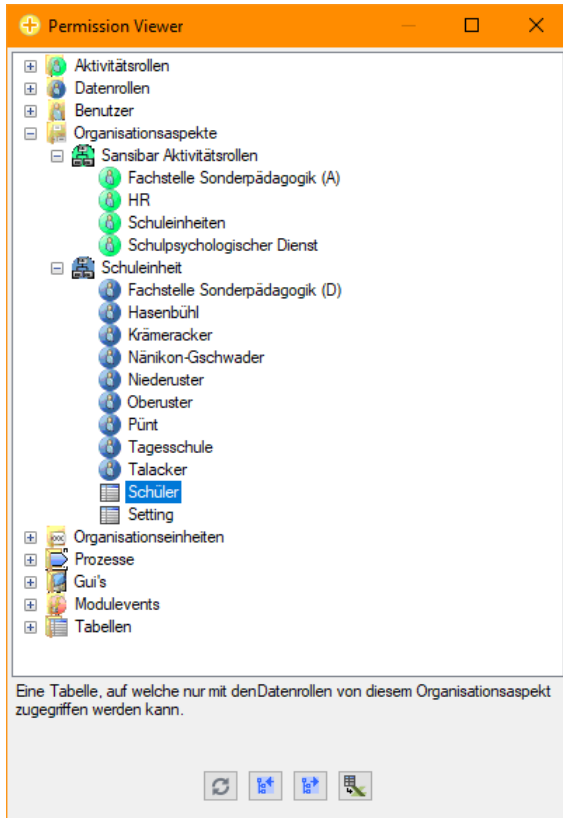


For the export, you can either select the template selected in the list or select a physical file (on the available drives) using "Select Document Template from File" and specify in the dialog where the generated file should be saved.

In addition, it is possible to specify whether the generated document should be created as a PDF file. The PDF file can also be signed (using the Posity Neo certificate). In the case of a signed PDF file, it can be determined whether it has been subsequently modified.

2. **Excel:** The data is exported to an Excel document. An Excel sheet (worksheet) is created for each table or list.
Text file: The data is exported to a text file. The values are displayed using «|» (Pipe) separately.
3. **CSV file:** The data is exported to a CSV file (CSV stands for Comma separated values). The values are indicated by «;» (semicolon) separately.

4.9 Permission Viewer / Role Concept

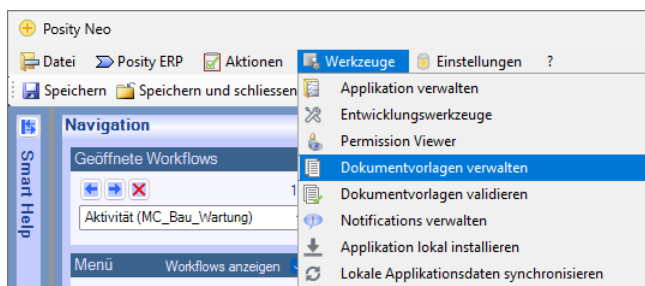


The permission viewer can be used to view how the roles (rights) in an application are structured and who has which roles in the application. The permission viewer can only be used to view the role concept, changes to the roles and their assignments must be made in the Posity Design Studio (PDS) or the menu item "Tools → Manage properties".

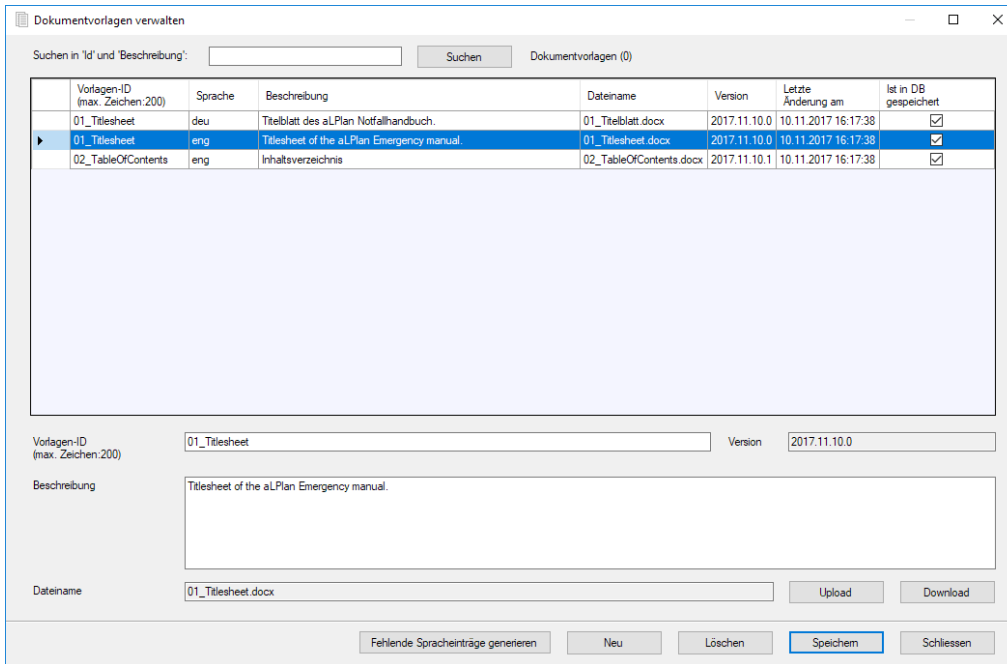
Below the tree are four buttons (refresh, collapse and collapse tree, as well as export to an Excel file), as well as a help text (above the buttons). The helper text tells you what information the selected node represents in the tree.

With the help of the permission viewer, it is also possible for you to see which activities and data you cannot see. This can be helpful if you suspect that you have been given too few rights. If you need further rights, they must be given to you by the person responsible for the application, you cannot grant them yourself.

4.10 Manage and validate document templates

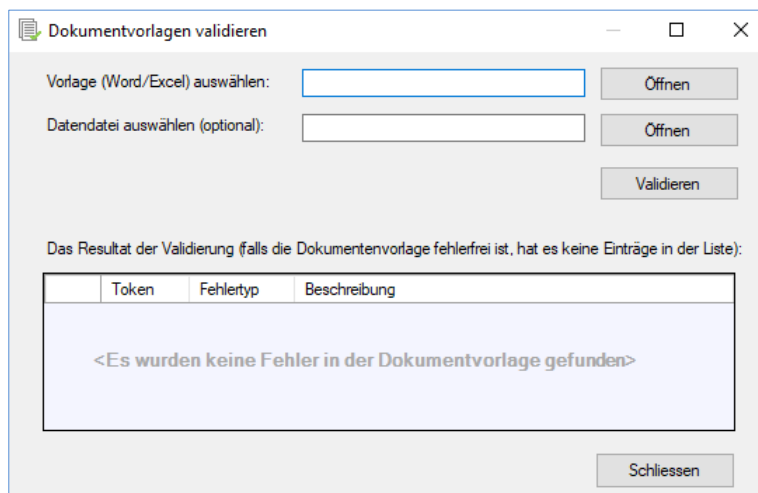


Document templates for creating high-quality Word or Excel documents (see previous chapter) can be managed by Posity Neo (menu item "Tools Manage → Document Templates").



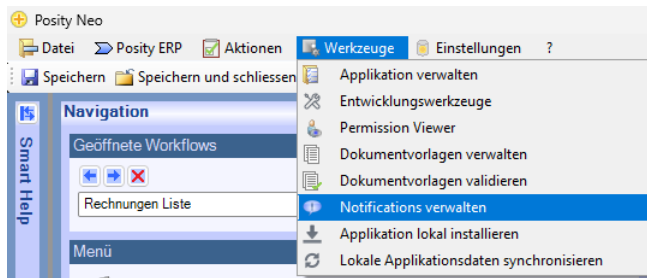
The document templates are stored in the correspondence languages of the application. The languages of correspondence are the languages used for correspondence. For example, an Italian company can also serve customers from German-speaking countries. The languages of correspondence would then be, for example, Italian and German (the application language Italian). Correspondence languages can be defined for an application under the menu item "Tools → Manage → properties [application name]".

To search for errors in document templates, you can use the "Validate → Document Template Tools" function. To do this, select the template to be checked in the dialog (the template cannot be selected from the templates managed in Posity Neo, but must be available as a physical file).

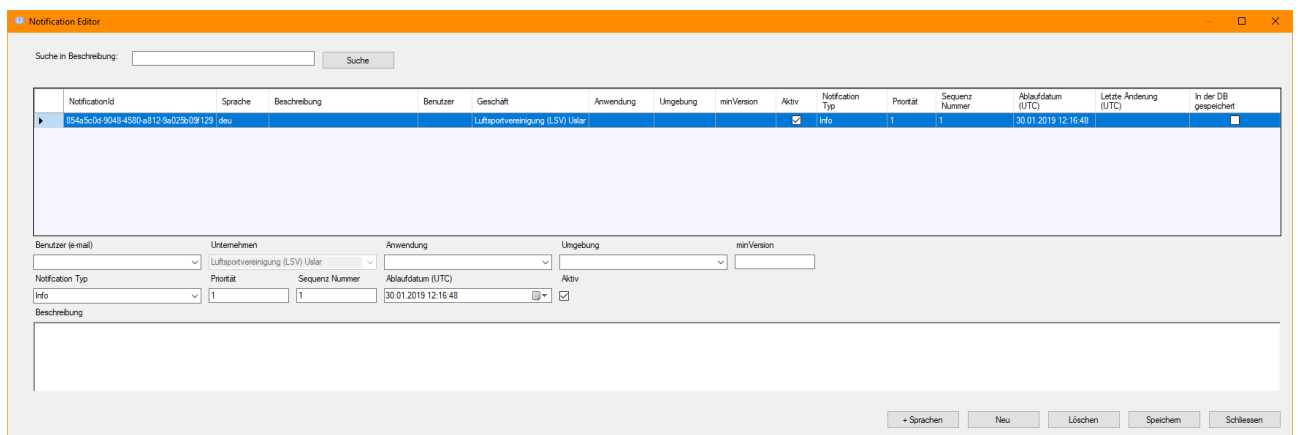


After pressing the "Validate" button, if any errors have been found, they will be displayed in the list. In addition, you can also check whether all the data used in the template is actually found in a particular GUI. To do this, export the data of the corresponding GUI to a file using "File → export → text file" and also select this file under "Select data file".

4.11 Manage Notifications



In Posity Neo, you can capture messages (notifications) that are displayed to all or selected users when they log in, or shortly after the message has been captured (in the worst case after 10 minutes). When viewing the message, the user can choose whether he wants to see it again after a short time, whether he wants to see it only the next time he logs in, or whether he does not want to see it at all.

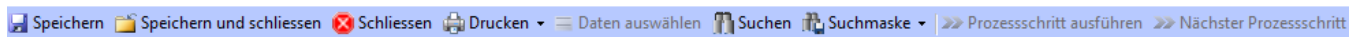


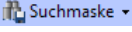
When you enter a new notification, you can limit who should see the notification. If you do not have Posity Neo-wide rights, the company is fixed and cannot be selected. You can make the following restrictions:

1. User: the message is only shown to one exact user
2. Application
3. Environment
4. Min. version: the version of the application must be at least the same as the specified version
5. Message Type (Info or Error)
6. Priority (1 = highest priority): determines the order in which multiple messages are to be displayed.
7. Sequence Number: determines the order in which multiple messages with identical priority are to be displayed.
8. If an expiration date is set (the information must be in UTC time), the message will no longer be displayed after the date, even if the user has never seen the message.

Don't forget to compose the messages in all the languages of the application. To do this, use the "+ Languages" button, which automatically generates the necessary entries.

5 Toolstrip



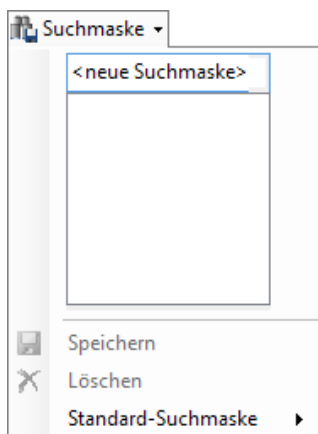
The tools strip lists the most frequently used functions of the menu, so that you can access them directly. The actions «Save», «Save and close», «Close», «Print», «Select data», «Search», «Execute process step» and «Next process step» have already been described in the chapter «4 Menu» and are therefore no longer considered here. A new feature in the toolstrip is the "Search mask" function: 

5.1 Creating a search mask

If you have input fields in the workspace that are used for a search (e.g. invoice status: you want to see all invoices whose status is "open"), you can save different search settings to use them again later.

If the workspace also contains lists, the display of the lists is saved for each search mask (see also 3.1). This allows you to adjust the order (and width) of the columns to the search criteria for different search masks. For example, if you are looking for invoice status, you can specify that this information is displayed in the first column of the list.

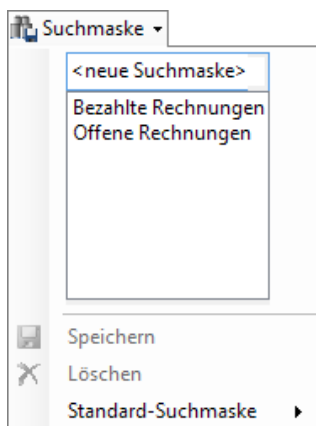
To create a search mask, proceed as follows:



1. In the workspace, type the values you want to save in the search boxes. In our example, we enter the status "Open" in the "Invoice list" process in the "Status" search field.
2. Give this search mask a name by clicking on "Search mask" and then on "<new search mask>". We give the search mask the name "Open invoices".
3. Press "Save". The name of the search mask now appears below "<new search mask>" in the list of existing search masks.
4. If you want to create another search mask, enter the name of the new search mask in the top field and press "Save".

5.2 Applying or deleting the search mask

To apply or delete a search mask, proceed as follows:








1. Press on «Search mask».
2. In the list, press on the desired «search mask». You can immediately see how the values of the search mask are transferred to the workspace.
3. If you wish, a specific search mask can also be used every time a specific process is called. To do this, press on "Standard search mask" and select the search mask that you want to use by default.
4. To delete a search mask, select the search mask from the list and then press "Delete".

6 Statusbar

Netbiz (2017.12.23.0) ERP deu CHF Schweiz, Bern (MEZ, mit Sommerzeit) RCM Kundendaten: Data 1  Partner wurden gesucht.   

The status bar displays information about the application. You can see there (from left to right):

- The name of the application, as well as the current version of the application.
- The name of the environment in which you are currently working (a single application can have multiple environments, e.g. test, training and production), in this case e.g. ERP.
- The language you are currently using, e.g. «eng».
- The general ledger currency of the application, in this case «CHF».
- The time zone you are currently working with, e.g. «Switzerland, Bern (CET with daylight saving time)».
- The data role you currently hold, e.g. "Customer data: Data 1"
- In the status bar on the right edge in front of the  symbol, short messages about activities of the process are displayed (in the example above, "Partners were wanted"). For example, after saving data, the message may appear there for a few seconds  **Mitarbeiter wurden gespeichert.** .
- Press  then you will get a list of all short messages for all open processes. Pressing the icon again closes the list.
- Press  then you will get a list of short messages about the work process in the workspace. For example, the list will look like this:

	Mitarbeiter wurden gespeichert.	08:46:12
	Mitarbeiter werden gespeichert ...	08:48:04
	Mitarbeiter wurden gespeichert.	08:48:04

7 Smart Help

The Smart Help section consists of three parts:

1. Short Tip: This is where short general tips on how to use Posity Neo are given.
2. Element Info: This is where information about individual elements of the application itself is displayed. If, for example, descriptions of the individual processes are entered, these descriptions are displayed here as soon as you move the mouse over a process in the menu tree.
3. Application Help: If there is separate documentation for the application, it can be viewed in this part.

In most cases, the Smart Help is minimized while you are working and is only opened by you when necessary.

8 Accessibility

Depending on the expected data type (e.g. date or number), Posity Neo provides you with accessibility features to speed up the entry of data. The following chapters show which input aids are available for which data types. A special case are fields that reference other data. These fields are defined in the chapter «3.2 Referenced data» on page 10 described in detail.

8.1 Date

There are three different input aids available for a date field. Either the date is "calculated" by means of special input (e.g. «m-2»), or the date is only partially entered, or the date is set with a given key (e.g. the «Home» button).

8.1.1 Date entry by means of calculation

First of all, the possibilities will be shown by means of special inputs. To do this, you have to enter the characters and leave the date field:

n	current date (n = now)
d+x	current date plus x Days (d = day)
d-x	current date minus x Days (d = day)
M+X	current date plus x Months (m = month)
m-x	current date minus x Months (m = month)
y+x	current date plus x Years (y = year)
y-x	current date minus x Years (y = year)
L+x	last day of the month plus x Days (l = last day of month)
l-x	last day of the month minus x Days (l = last day of month)

For example, "d+7" can be entered, which corresponds to one week from now. If exactly one (1) day, month or year is to be added or subtracted, a shorthand notation can be used (if n is not specified, 1 is used by default). For example, "m+1" is shortened to "m+".

8.1.2 Date entry by means of partial data

When entering the date, it is not necessary to enter the entire date. If only parts of the date are entered, the missing information is automatically filled in with the current date. For example, if a date field has the format "dd.mm.yyyy" (day.month.year), then only the day can be entered. When leaving the field, the month and year are set according to the current date. If, for example, today is 2.3.2019 and only the number "25" is entered in the field, the field will be filled with the date 25.3.2019 when leaving.

It is also possible to enter more than one number, the numbers will then be copied according to the format of the field. For example, if a date field has the format "yyyy-mm-dd" (year-month-day), the current date is 2.3.2019 and the numbers "2020 4" are entered, then the date 2020-4-2 will be set when leaving the field. The numbers can be separated with any character, instead of "2020 4" you can also enter "2020.4" or "2020<4".

8.1.3 Date input via key control

Date fields can also be set with the function keys. The date is set immediately when the button is pressed. The following buttons can be inserted into date fields:

1. F5 ...current date
2. F6 ...Date of the field plus 1 day (Add/+ of the numeric keypad)
3. F7 ...Date of the field minus 1 day (subtract/- of the numeric keypad)
4. F8 ...Date of the field plus 7 days
5. F9 ...Date of field minus 7 days

8.2 Time

The time can be set in the same three ways as the date.

8.2.1 Time entry by means of calculation

First of all, the possibilities will be shown by means of special inputs. To do this, you have to enter the characters and leave the time field:

n	current, local time (n = now) according to the settings of the operating system
u	current UTC time (n = now)
h+x	current time plus x Hours (h = hours)
h-x	current time minus x Hours (h = hours)
M+X	current time plus x Minutes (m = minutes)
m-x	current time minus x Minutes (m = minutes)
S+X	current time plus x Seconds (s = seconds)
s-x	current time minus x Seconds (s = seconds)

For example, "h+7" can be entered, which now corresponds to 7 hours. If exactly one (1) hour, minute or second is to be added or subtracted, a shorthand notation can be used (if n is not specified, 1 is used by default). For example, "m+1" is shortened to "m+".

8.2.2 Time entry by means of partial data

When recording the time, it is not necessary to enter the entire time. If only parts of the time are entered, the missing information is automatically added to 0. For example, if a time field has the format "hh:mm" (hours:minutes), then only the hour can be entered. When leaving the field, the minutes are then set to 0. If, for example, only the number "15" is entered, the field will be filled with the time "15:00" when leaving.

It is also possible to enter more than one number, the numbers will then be copied according to the format of the field. For example, if a date field has the format "hh:mm:ss" and the numbers "15 5" are entered, then the time "15:05:00" will be set when the field is left. The numbers can be separated with any character, instead of "15 5" you can also enter "15/5". A special case is the decimal separator (depending on your operating system settings/culture). For example, if the decimal separator is «.» (period), then "14.5" can also be entered as a number. This is then interpreted as 14:30.

8.2.3 Time entry by means of key control

Pure time fields can also be set with the function key F5. The time is set immediately when the button is pressed. The following button can be used in time fields:

1. F5 ...Current time

8.3 Date and time

Fields with date and time behave very similarly to date or time fields. They are like a combination of date and time field in their behavior.

8.3.1 Date and time input by means of calculation or partial entries

The same calculations and partial inputs can be used as for date or time fields. If a time is (also) calculated, a capital "T" must be written in the text before this part of the text. Possible entries are e.g. (we assume we currently have 2.3.2019 15:32:40):

- «m+1Tn» results in «04/02/2019 03:32:40 PM» (date and time calculated)
- «nTm+90» results in «02.03.2019 17:02:40» (date and time calculated)
- «nT15» results in «02.03.2019 15:00:00» (date calculated and time with partial entry)
- «L-2» results in «02.04.2019 15:32:40» (date calculated and time set automatically, the «T» can be omitted)
- «Th-2» results in «02.04.2019 15:32:40» (date automatically and time calculated)
- «31T17» results in «31.03.2019 17:00:00» (date and time with partial entry)

8.3.2 Date and time input via button control

The same keys can be used as when entering the date using key control.

8.4 Time

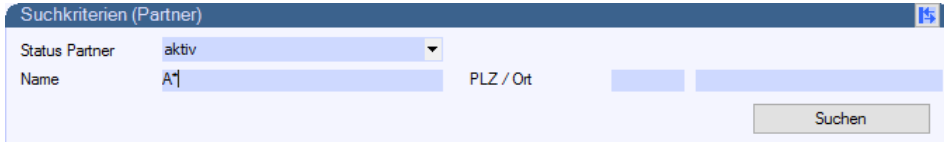
Fields that record a period of time can be filled in by means of partial entries. For example, if the format is «hh:mm:ss.sss» (hours:minutes:secondswithmilliseconds), a number can be entered for each of the 3 parts. The first number is used for the number of hours, the 2nd for the minutes, and the 3rd for the seconds and milliseconds. For example, if "20 6" is entered, the field will be filled with "20:06:00.0000".

The numbers can be separated with any character, instead of "20 6" you can also enter "20/6". A special case is the decimal separator (depending on your operating system settings/culture). For example, if the decimal separator is «.» (period), then "20.5" can also be entered as a number. This is then interpreted as "20:30:00.0000".

9 Search with wildcards

9.1 Search with a single search term

In many places in Posity Neo you can perform a flexible search with wildcards for other characters (there are also search fields that expect exact input without wildcards). In the example below, for example, you can use `A*` to search for all partners (the `*` in the search field is the placeholder) that start with the letter A.



Within Posity Neo, the following placeholders can be used:

1. `*` or `%` placeholder: It can be replaced by any number of characters (even no character). For example, you can use `M*ller` to search for Müller, Miller, Mueller, Maischoller, etc.
2. `?` or `_` (underscore) placeholder: It can be replaced by exactly one character. For example, with `M?Müller`, Miller, Moller, etc. can be searched for.
3. `[]` Placeholder: In its place, a character from a certain range (e.g. `[0-9]` for characters between 0 and 9, `[a-d]` for a character between a and d), or a character from a specific selection (e.g. `[ijy]` stand for i, j, or y). For example, `M[ae]ier` can be used to search for Maier and Meier at the same time.
4. `[^]` Placeholder: In its place, no character from a certain range (e.g. `[^0-9]` for characters between 0 and 9, `[^a-d]` for a character between a and d), or no character from a specific selection (e.g. `[^ijy]` stand for i, j, or y). For example, all orders that do not start with the letter A can be searched by `[^A]*`.

In Posity Neo, it is also possible to set for each individual user whether an `*` should be automatically inserted at the beginning and end of the search term in search fields. If this function is activated, e.g. when searching for Müller, it will automatically search for `*Müller*`. As a result, terms such as milling, miller printing, long miller, etc. are displayed.

If you want to search for a `*`, `%`, `?` or a `_` in a search (i.e. these should not be interpreted as placeholders), they must be enclosed with square brackets. For example, the `*10[%] discount*` is used to search for a text that contains the text 10% discount at any point.

For each search field, it can be additionally specified (must be done by developer):

1. A distinction is made between lower and upper case (default: no distinction).
2. Are accents differentiated or not (default: no distinction). For example, Genève is displayed without distinction when searching with Geneve, Würenlingen is displayed when searching with Wurenlingen.
3. Differentiated by kana type (Japanese kana characters: hiragana and katakana) (default: no distinction).
4. Leading spaces are ignored (default: no). If the placeholder `*` is automatically inserted according to the user settings, this setting has no effect.

9.2 Multi-term search

In addition to searching with a single search term, it is also possible to search for several search terms in selected fields. You can recognize these fields by the fact that a corresponding note appears in the tooltip of the field. This search is only used in a few places, as it requires significantly more computing time.

In the simplest case, several search terms can be specified according to the explanations of the previous chapter, an example with two search terms: [Müller M\[ae\]\[iy\]er](#). This displays all data that contains either Müller, Maier, Mayer, Meier or Meyer. If accents are not distinguished, Müller will also be displayed. If we also want to get records with Mueller, we can introduce this as a third search term: [Müller Mueller M\[ae\]\[iy\]er](#).

If you want to search for a word combination as a whole, this word combination must be framed by means of double goose feet. For example, if you want to search for "Winterthur as a place of work" (and not for a place of work or Winterthur) or an order, then the spelling is: ["Winterthur place of work" is order](#).

In addition, it can be specified that several search terms must occur at the same time. If, for example, the term car or bicycle should always appear together with yellow or red, this can be defined by means of an ampersand. The symbol for this is: [&&](#). In the example listed, therefore, one would [write car bicycle & yellow red](#) (the ampersand link is executed after the OR link).

It can also be specified that certain search terms may not be included. For example, if you want all cars and bicycles that are not yellow, then the search term is: [car bicycle & yellow](#).

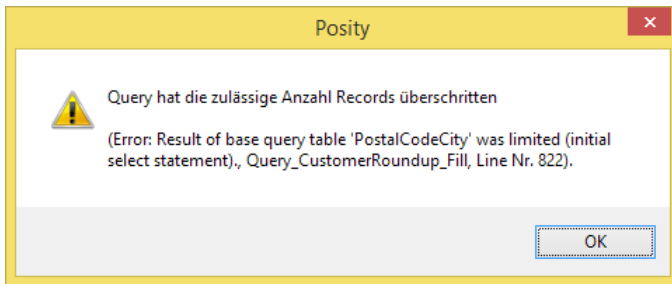
Finally, a few examples:

- [Beer, Wine, Sparkling Wine](#) All data containing beer, wine or sparkling wine.
- [Beer, Wine, Sparkling Wine & Promotion](#) : All data that includes beer, wine or sparkling wine and also the word promotion.
- [Beer, Wine, Sparkling Wine & Promotion & Discount](#): All data that includes beer, wine or sparkling wine but does not include promotion or discount.
- ["Software Engineering" & Architecture & Discipline](#): All data that includes "Software Engineering" and Architecture and Discipline.
- ["\[\]Soft\[,.\]" & -Gun Skills](#) All data containing the word Soft preceded by space, comma or period (excluding words such as software or soft drink), excluding the word Gun but with the word Skills. The goose feet are necessary here, because the search expression contains a space.
- [-"Data Warehouse"](#): Any data that does not contain the word Data Warehouse.

10 Warnings and errors

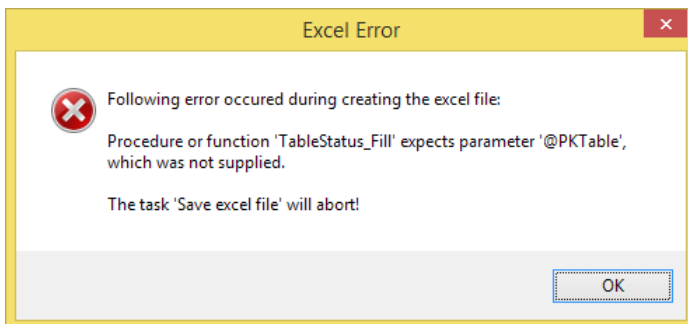
10.1 Warnings

Warnings in Posity Neo alert you to dangers - but you can continue your work. For example, in Posity Neo, most lists are limited to a certain number of records (in order to limit response times and the amount of data displayed to a reasonable level). If this number is exceeded, you will usually receive a warning that not all records are displayed:



10.2 Application error

Application errors are errors that occur during the execution of the application and that are caught within Posity Neo (e.g. unexpected interruptions in the connection, missing files). In these cases, a normal error message will be displayed, which looks like this:



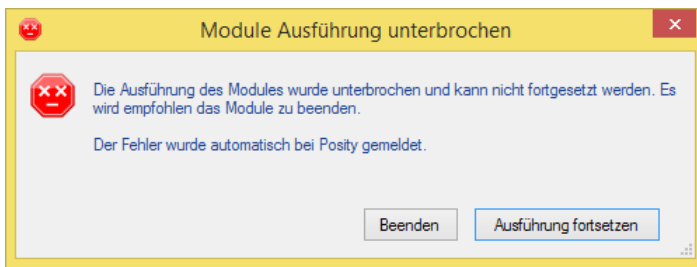
If you confirm the error message with "OK", an attempt will be made to continue processing. This does not always succeed. In these cases, an error message will appear informing you that the current process is being aborted ("Click Next"). Other processes that have already been opened are not affected by the error, only the affected process is terminated. "Exit" closes Posity Neo completely. If the error within Posity Neo can no longer be handled correctly, it is possible that Posity Neo will be closed completely.




If this error occurs repeatedly, you should bring it to our attention. This type of error is not recorded in the error log and is NOT automatically reported to us.

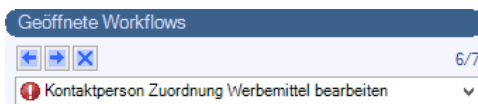
10.3 Runtime

If there is an error in the runtime environment of Posity Neo (the environment that runs the Posity Neo modules), an error message is displayed that looks something like this:



This error is entered in the error log of Posity Neo (provided that the Internet connection is available) and is automatically transmitted to us. We will try to fix the error.

If you press "Exit", an attempt will be made to close the affected process. If you press «Continue execution», an attempt will be made to continue processing, but this is usually not possible. In this case, the process will be frozen, which you can tell by the red execution mark in front of the process name. These processes can no longer be used normally. Use the  button within the "Open Workflows" section to forcibly terminate these processes.



If the error within Posity Neo can no longer be handled correctly, it is possible that Posity Neo will be closed completely.

11 Installing Posity Neo for offline mode

With the Posity Neo offline mode, a Posity Neo application can be used without a permanent internet connection. To do this, the Posity Neo application is installed locally on the computer. Changes made to the local data can be synchronized with the online data at a later time, if you are connected to the Internet.

11.1 Preconditions

The computer must be pre-installed with the Microsoft SQL Server Express 2012 or later database.

The "MS SQL Server Express" (free version) can be downloaded here:

<https://www.microsoft.com/de-ch/sql-server/sql-server-downloads>

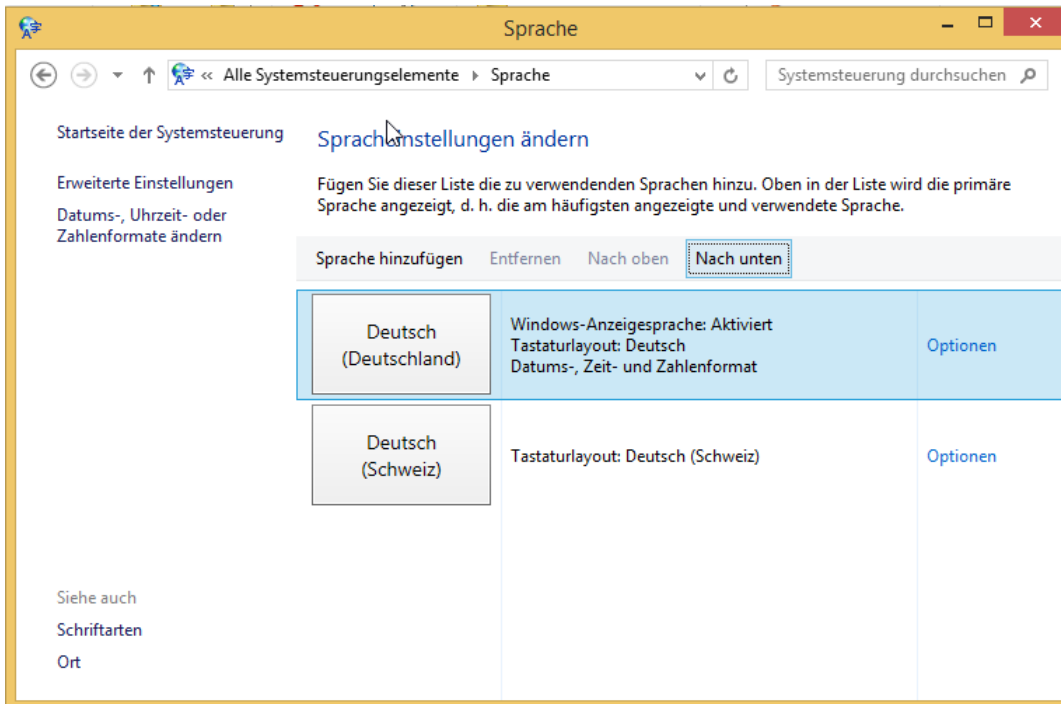


Illustration 1 - Set language to German (Germany)

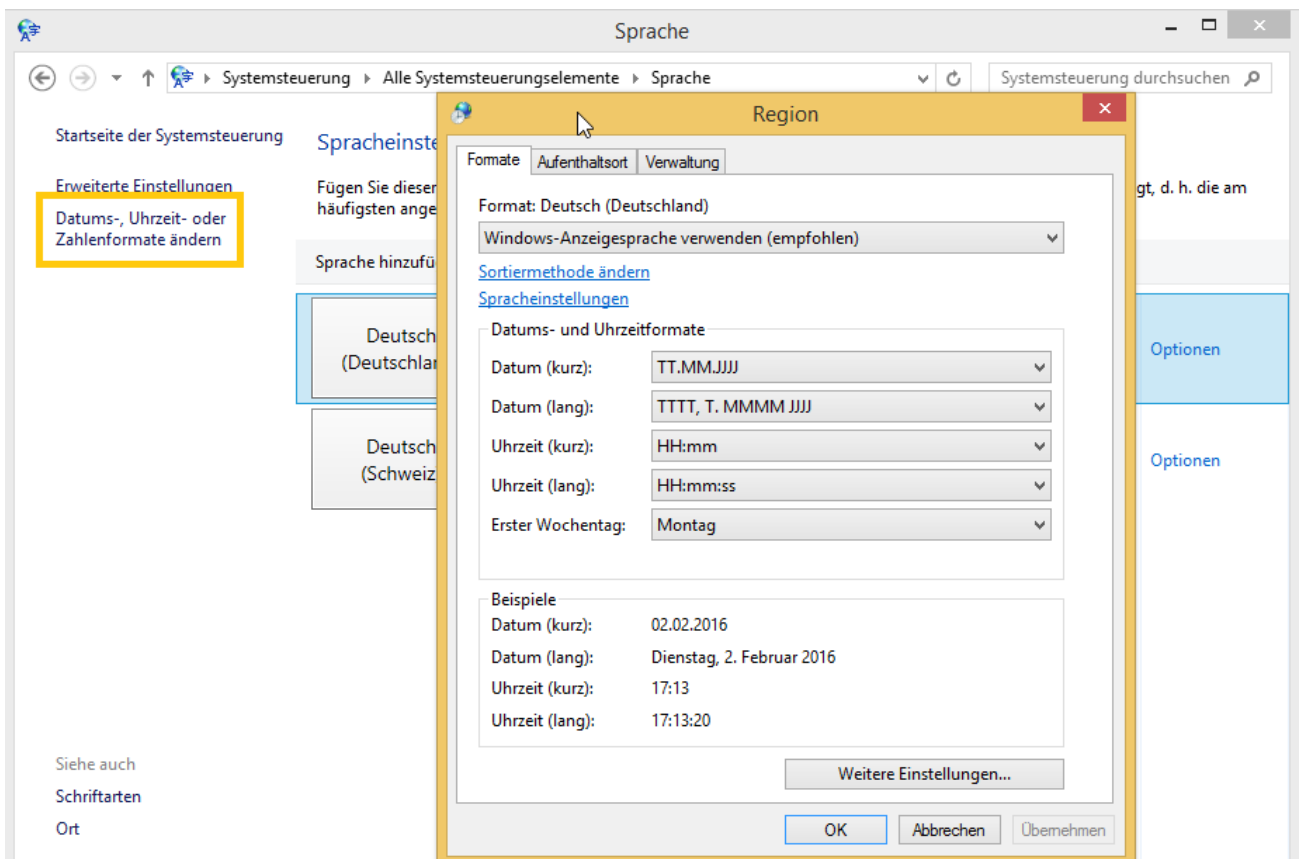


Illustration 2 - Set format to German (Germany) in the region settings

11.2 Installation

The settings listed below need to be adjusted. All other settings can be left in the Settings dialog.

11.2.1 Instance Configuration

MS SQL Server Express is installed as a named instance by default. Accept the suggested instance name or assign one of your choice. If the default instance is selected, the "MS SQL Server Express" will be named MSSQLSERVER. Only one instance can be installed on the computer as the default instance. The instance name is used to select where Posity Neo stores the offline data.

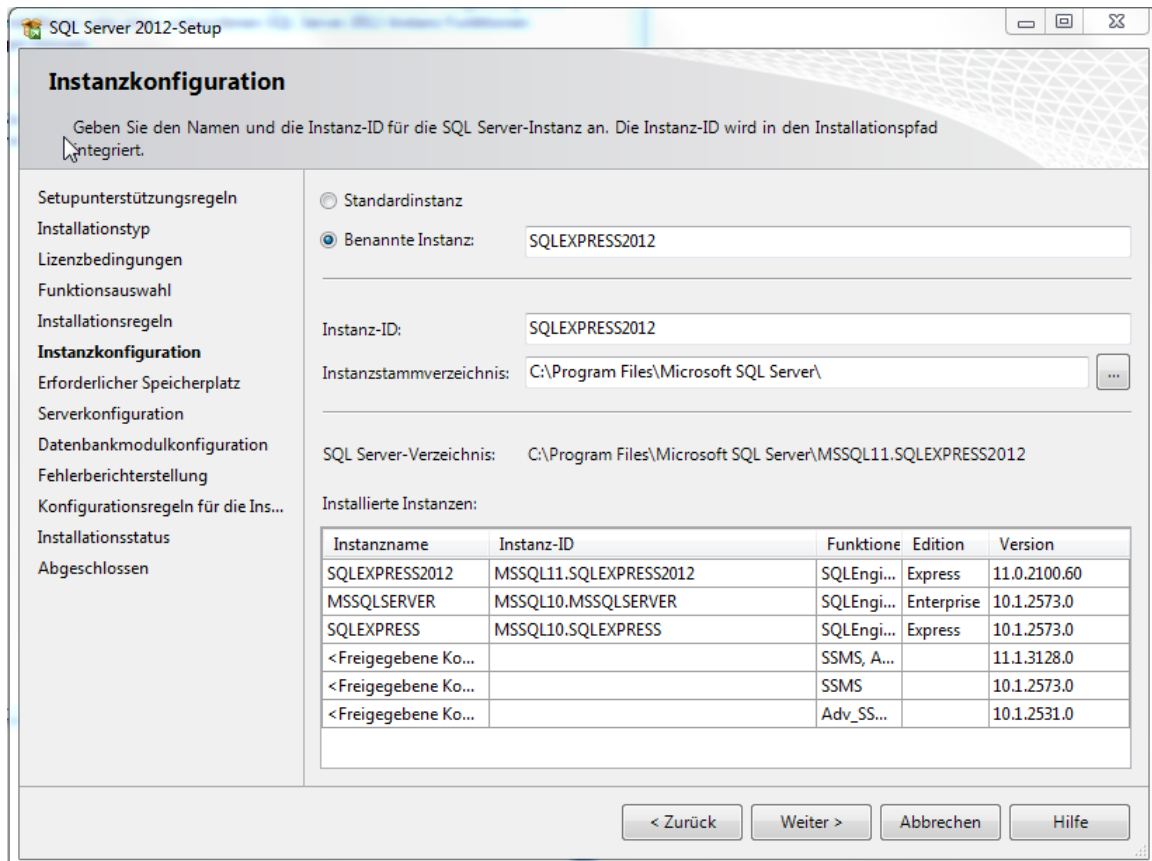


Illustration 3 - Instance configuration

11.2.3 Accounts

The "MS SQL Server Express" for the Posity Neo offline mode must be running under the local system user. In this window, for the SQL Server database engine, change the user to NT-AUTHORITY\SYSTEM. You can find this user using the << Browse... >>.

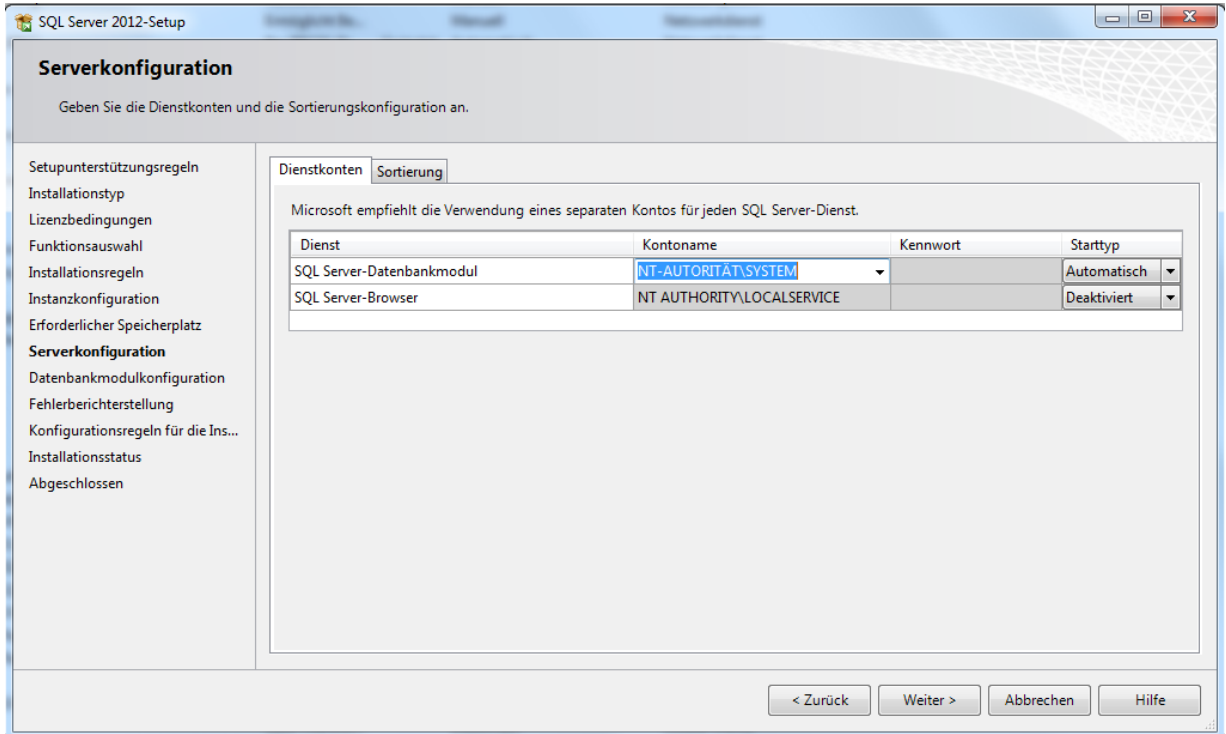
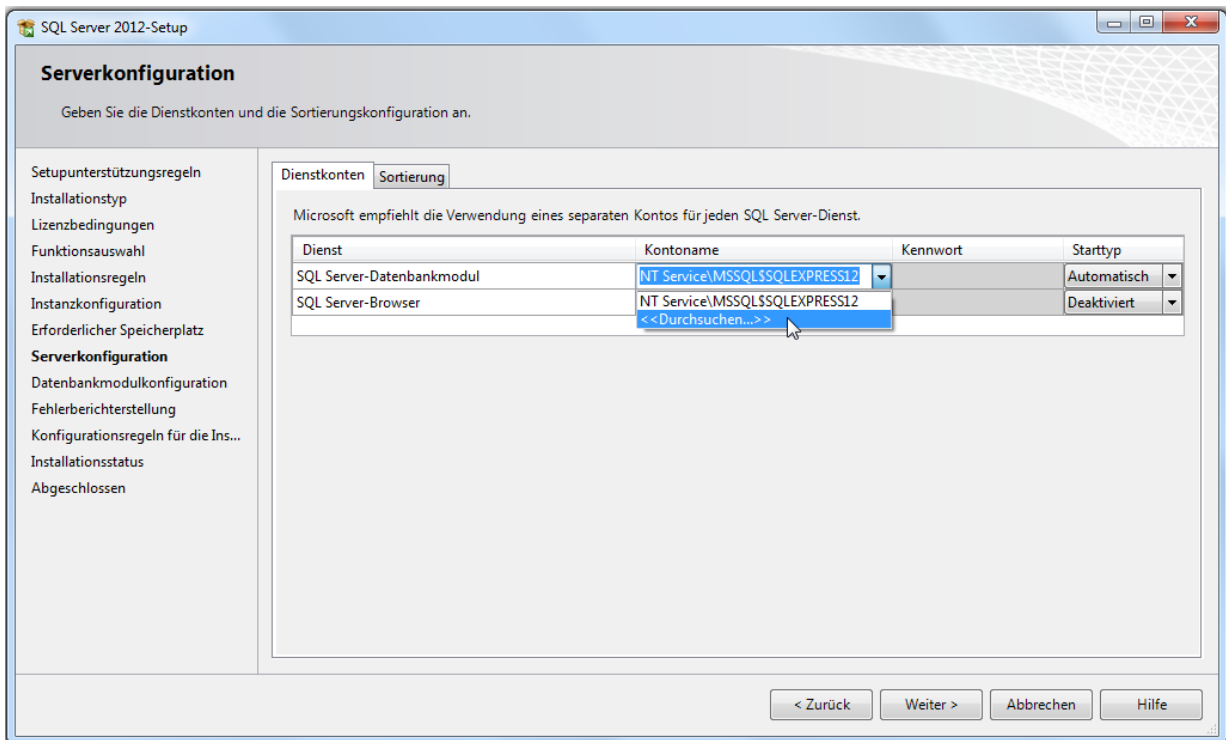


Illustration 4 -Accounts

11.2.4 Authentication Security Mode

Select the "Mixed Mode" authentication mode. Add the Windows user using Posity Neo to the SQL Server Administrator and set any password for the SQL Server System Administrator.

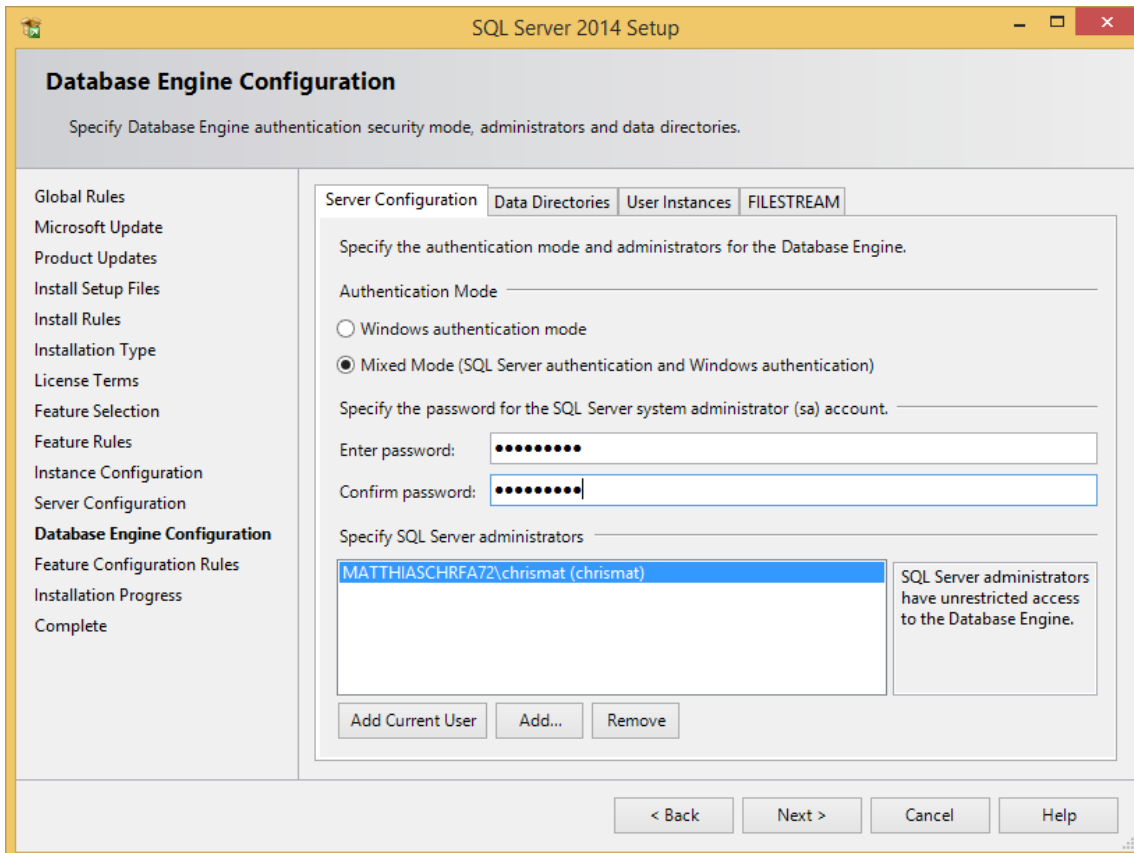


Illustration 5 - Authentication security mode

11.3 Using Posity Neo Offline Mode

11.3.1 Install application locally

An application can be installed locally under the menu item "Tools → Application Install Locally". If you have several "MS SQL Server" installed, you have to select the instance in which the data is to be installed. If there is only one instance, it is already selected.

11.3.2 Synchronize local application data

Data that has been changed in offline mode can be synchronized with online data in different modes at a later time via the menu item " → Tools synchronize local application data":

Mode	Description
Full	All or no data is synchronized. If a conflict occurs, no data is synchronized.
UntilConflict	If a conflict occurs, all data is synchronized until the conflict. Subsequent changes (packages) will be discarded.
AsMuchAsPossible	Data (packets) with a conflict will not be synchronized, all other data will be synchronized.

If data is imported despite the conflict (last two variants), it is always transferred to the database in whole packages, i.e. per "save action" (per transaction). If, for example, you change two or more lines in an offer, as well as the discount of the offer and then press "Save", these changes will only be applied as a whole package or not at all.

Glossary

Group Box	Several input fields are combined in the Group Box.
GUI	Graphical User Interface
PDS	Posity Design Studio
Process	Describes a sequence of individual activities that are performed incrementally to achieve a business or operational goal
Step	Process that is linked to an executable module.
Tooltip	Note text that appears automatically when the mouse is moved over an element (field, button, etc.) (without clicking on it).
Splinter	Integrates Computer Window (or part of a window) into two separate areas of variable size (German: separator bar)
Workflow	When a process is opened, a workflow is automatically activated. If the process is linked to subsequent processes in the workflow, these processes are automatically opened after closing the previous process.