AssetW**O**RKS

Screen Designer - Homepage

Application Training

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Telephone: 1-610-225-8300

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Website: Community.AssetWorks.com

The support website can be used to open issues, subscribe to user groups, and download documentation, as well as to access the latest AssetWorks news. For secure access to the website, contact Customer Support by calling the number above.

Screen Designer – HomePage Application Training

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Overview

The M5 Screen Designer accomplishes these goals:

- 1. Allows the client to develop their own frames in M5 by reordering the frame layout as well as adding custom fields, removing existing fields, and reordering fields.
- 2. Provides an additional level of security beyond Field Security Templates. The custom frames can show a limited view of the data and sensitive fields can be removed.
- 3. Allows multiple versions of the frame to be created for different users and workflows.

To support this functionality, specific M5 frames were redesigned and built-in small pieces. These pieces are logical and self-sufficient. They contain related data fields. These pieces are referred to as a Control. The user can build multiple frames from the same Controls.

The current security model is in place for all the frames that are designed to be used with the Screen Designer functionality including Department Access Functionality (DAF). The same menu level security is available. For instance, the custom frame can be assigned read-only mode, and field level security templates can still be used.

A foundation is a logical group of Controls. These are certified to work together and can use different business components (application programs). Foundation frames are defined by AssetWorks. A newly designed frame can have only one foundation frame; however, multiple foundations may be available for the same Controls.

Foundations define the mandatory Controls. A foundation frame, to create a record, must supply all the required data on a frame. A foundation frame to update a record can only update specific data.

1. Screen Designer – Home Page

SAVE UNDO RE	FRESH DELETE	FIND ATTACH RELATED ~					
Screen Designer							
General Information							
Screen Name:	Description:						
NEW HOMEPAGE	NEW HOME PAGE						
Allow User Customization:	Foundation:						
No 🗸	Home Page	*					
Assemble Organize							
Mode: • Fabrication	Preview (shortcut key = ALT-R)	O Arrange					
C Screen Summary)				
S	earch						
Screen Title	Key Block	Notify Events					
HyperLinks (instance 1)	HyperLinks (instance 2)	HyperLinks (instance 3)					
HyperLinks (instance 4)	HyperLinks (instance 5)	HyperLinks (instance 6)					

Assemble tab

Overview of Controls

- Controls are simply small pages of information.
- Each group of logically related fields is a separate Control. Their relationship to other Controls is established by the foundation.
- Controls deal only with their own fields. There are no direct references to another Control's fields.
- Controls can be made mandatory.
- Every frame built on the foundation will have this control. These are set by AssetWorks if the data must be present for the business logic to function.

Adding Controls

1. Navigate to the Assemble tab of the Screen Designer frame.

Jescription: NEW HOME PAGE
Foundation: Home Page

- 2. There are two modes with radio buttons: "Fabrication" and "Preview". Select the radio button for "Fabrication" when adding Controls to the frame. Select the "Preview" radio button to review the custom frame that was designed.
- 3. There are two sections for the "Fabrication" radio button:
 - Screen Summary Section
 - Preview Control Section
- 4. Screen Summary Section

Controls that are required on this frame are automatically checked. The Controls can be selected by selecting the checkbox in front of the specific Controls.

5. Preview Control Section

Select a control by selecting the checkbox next to it. You can also double-click on the control to quickly navigate to the control further down the frame.

- Any Control selected will show a blue border. Controls not selected have a red border. In addition to the required Controls, any additional Control groups can be selected by selecting the checkbox to the left of the Control.
- 7. After the checkbox is selected, the square will turn blue.

This control will display all the user's favorites pages as buttons. If the user does not have a restricted home page and they do have the 'EDIT HOME PAGE' privilege, they will be allowed to make changes to the favorites. This control allows the addition of external links as well as M5 frames to the favorites.
M. Trunches &
My Favorites
Sample Frame 1 Sample Frame 2 Sample Frame 4 Sample Frame 5 Sample Frame 5

8. Next select the Property Sheet icon for the selected Controls.

iπ.	denned.						
	show/hide	le the p	roperty sheet for this control.				
	— 🗹 Home Page Favorites 🚺 🛛	•	Group=Home Page Favorites				
	This control will display all the user's favorites pages as buttons. If the user does not have a restricted home page and they do have the "EDIT HOME PAGE" privilege, they will be allowed to links as well as M5 frames to the favorites.						
	Property Sheet						
	Attribute Form	nat	Value				
	Appearance (B=Button L=Link) Chara	racter					
			A value of L means the favorite will be displayed as a link. B means button. The default is L.				
	Orientation Chara	racter	Indicates how the buttons or links will flow on the screen. In vertical mode they will be straight up and down on the screen in one column. I mode they will be placed on the same line until the line is full. The valid values are V (vertical) or H (horizontal). The default is horizontal.				
	Width in pixels Integ	ger	Button width. If not specified the generated button will be large enough to contain the specified text. If you have several buttons and you w all be the same size find an appropriate value and set the width in each the buttons.				

- 9. In the Preview Control section, if there is a Note Pad icon to the right of the Control name, there is a property sheet for the Control. Please note, not all Controls have Property Sheets and not all Property Sheets are the same for the Controls. To display the Control's property sheet and make changes, select the icon.
- 10. In the example below, color, text and images can be added/changed to the frame being developed.

	SAVE	REFRESH	DELETE FIND ATTACH RELATED ~
Г	🖉 Screen Title . 🧕 😧	† —	
	Property Sheet		
	Attribute	Format	Value
	Version	Character	
			Optional version number to be shown at the top of the screen.
	Screen background color	Character	Background color for the new screen. It may be a named color known to Internet Explorer or it may be an RGB color specified in the format #RRGGBB
	Screen background image URL	Character	
			A source path and name to an image file to be used as the background to the designed screen. Normally you should place the images in the /images folder narallel to (m5web and start this specification with /images / + wurtmane non
	Repeat background image	Character	
			Y or N. Should the background image repeat.
	Image position left/right %	Integer	
			Used to position a non-repeating background image. 0=Left 100=Right
	1 01 1 01 01 01		
	image position top/bottom %	integer	Used to position a non-repeating background image. 0=Top 100=Bottom

Adding Help Text to a Control

To add user-definable help text, select the *i* icon. Straight text or html can be entered. Up to 444 characters can be entered.



The text will display directly above the control on the screen designed frame.

Adding the Version Number

By entering the version number here, the new frame will have this version number next to the frame name. This is optional.

SAVE UNDO	REFRESH	DELETE FIND ATTACH RELATED ~
Screen Title . 💽 🕜	† —	
Attribute Version	Format Character	Value Optional version number to be shown at the top of the screen.
Screen background color	Character	Background color for the new screen. It may be a named color known to Internet Explorer or it may be an RGB color specified in the format #RRGGBB
Screen background image URL	Character	A source path and name to an image file to be used as the background to the designed screen. Normally you should place the images in the /images folder parallel to /m5web and start this specification with /images/ + yourImage.png
Repeat background image	Character	Y or N. Should the background image repeat.
Image position left/right %	Integer	Used to position a non-repeating background image. 0=Left 100=Right
Image position top/bottom %	Integer	Used to position a non-repeating background image. 0=Top 100=Bottom

- 1. Navigate to the Property Sheet for the Screen Title control in the Preview Control section.
- 2. Select the Property Sheet icon.
- 3. Enter the Version Number.

Message Editor Foundation

The message editor foundation is used to create corporate message pages that can be added to custom home pages. A single home page can have up to six different, message controls added to it. The content of these message home pages can all be unique. There is no limit to how many message pages are created using screen designer.

SAVE UNDO RE	FRESH DELETE FIND ATTACH RELATED ~						
Screen Designer							
General Information							
Screen Name: NEW MESSAGE EDITOR	Description: Message Editor						
Allow User Customization:	Foundation: Message Editor						
Assemble Organize							
Mode: Fabrication Preview (shortcut key = ALT-R) Arrange Screen Summary Search Screen Title Message Editor Screen Title Screen Title Screen Title Screen Title Screen Title							
Screen Preview							
Message Editor . Q 🕑 🕇							

The property sheet for the message editor foundation contains an attribute called message key. This is the name for the corporate message page and is required. It is used to select the message when adding message controls to custom homepages. The message key name must be unique so when creating new message pages in screen designer, make sure to use different message key names for one.

2. Home Page Controls

Screen Title

By selecting the Properties for the Screen Title control, the user can change the overall look of the form such as font, background color, color of help text, designate an image as background, or alignment of help text.

SAVE	NDO	REFRESH	DELETE FIND	ATTACH	RELATED ~				
Screen Title	Q	† —							
Property Sheet—									
Attribute		Format	Value						
Version		Character							
			Optional version number to be s	hown at the top of the s	screen.				
Screen backgrou	nd color	Character							
			Background color for the new so	creen. It may be a name	ed color known to Internet E	xplorer or it may b	e an RGB color specifi	ed in the format #RRGGBB	
Screen backgrou	nd image URL	Character							
give a			A source path and name to an in	nage file to be used as	the background to the desig	gned screen. Norn	nally you should place	the images in the /images	
			folder parallel to /m5web and st	art this specification w	ith /images/ + yourImage.p	ng			
Repeat backgrou	nd image	Character							
			Y or N. Should the background in	mage repeat.					
Image position le	eft/right %	Integer							
			Used to position a non-repeating	background image. 0=	Left 100=Right				
Image position to	on/hottom %	Integer							
inage position to	<i>, , , , , , , , , , , , , , , , , , , </i>	integel	Used to position a non-repeating	a background image 0:	=Top 100=Bottom				
			cood to poolition a non repeating	, such gio and image. 0-	.op .co Dellom				

Notify Events

This control will display external events that generated work requests and need approval. This control has no visual element. If there are events that need approval they will be displayed in a pop-up as the user displays the home page.

- V Notify Events	
inotity Events	
This control will displa	y external events that generated work requests and need approval. This control has

Hyperlinks (1-6)

This control allows a user to link to another M5 frame or any external link. All frames that begin with HTTP or have the "New Window" selected will be opened in a separate window. In other cases, the current window will be replaced.

Category Links

Using this control, a user can link to another frame defined in the ACCIDENT_CATEGORY table. This is normally done when multiple versions of the frame exist, and the user must select which version they need to use. The main difference between this and the hyperlinks control is because this is based on a data table, a database constraint can be created to validate the type selected.

Break Instance (1-9)

Breaks are used to leave a blank area or space before or after one of the other controls. It is useful to help make the form look a little neater. There are up to six breaks available. The designer can add text as a heading by using the Text or HTLML field.

Spacer (1-4)

The spacer control has the same features as the break control, but it does not force the next control to go to the left of the frame. You can also specify a minimum width of the control. This is useful in pane layout as it will force the pane to expand to accommodate this control. It can also be used to push a control to the right to make it line up with something else in the same pane.

Image (1-3)

This control can display and scale images. The image can be in a specific directory on the server, or it can be attached to the designed screen by screen designer. The size of the image can be controlled by using the "arrange" mode of screen designer.

Message Viewer (1-6)

This control provides a read only view of a message that was created by another frame built using the message editor foundation (mentioned above).

Go Button (1-6)

Go Button allows for the designer to create buttons or links to other forms. When the user selects the button or link, the form will auto-save. One use can be that the form is so long, you want to design the form to have multiple pages.

Logoff Button

The logoff button will display a button or link on the homepage to log the user off M5.

OPM's

There are ten OPM's (operational performance monitors) that can be added directly to the home page using screen designer. These are like KPIs but are created and maintained by AssetWorks. The OPM's are as follows: motor pool status by class, overdue work requests, job status, work order information, labor information, pm information, commercial repair, jobs assigned, warranty information, and system run information.

Notes (1-2)

Up to two notes can be added to the form. Notice below the control, the designer can view what the form will look like for this control without going to 'Preview'.

Name is important as this is the name of the note in the database.

Calculator

This control can be used to perform simple math equations directly from the home page. This control does not have a property sheet.

Date Calculator

Determines the differences between to dates or to add/subtract years/days/months/hours and minutes from/to a date. This calculator is DST aware when doing hour math. There is no property sheet for this control.

Length Converter

The length converter control converts lengths of measurements for the following miles, kilometers, centimeter, millimeter, yard, foot, and inch. There is no property sheet for this control.

ICU Status

The ICU status control will show those ICU's online and offline for the locations chosen in the property sheet.

Dashboard Meter (1-6)

This control will display the latest result from one of the user's defined dashboards as a meter. This control is primarily for use on a personal home page. If this is used on a home page for multiple users, all the users must have the same dashboard defined. If the user does not have access to the dashboard the meter will display an information message about not finding the result.

- 1. The list of dashboard KPIs to select from is shown by selecting the dropdown box in the property sheet.
- 2. It is recommended to lock the meter to a small size since it will take up room on the home page if it is kept at a larger size.
- 3. A comma delimited list of ticks can be specified for the meter. However, if the KPI is set with a minimum and maximum value that is divisible by five, the ticks will automatically display.

Dashboard Spark Line (1-6)

This control will display a spark line of the results from all iterations of one of the user's defined dashboards. This control is primarily for use on a personal home page. If this is used on a home page for multiple users, all the users must have the same dashboard defined.

Home Page Favorites

This control will display all the user's favorites pages as buttons. If the user does not have a restricted home page and they do have the "EDIT HOME PAGE" privilege, they will be allowed to make changes to the favorites. This control allows the addition of external links as well as M5 frames to the favorites.

Home Page Favorites (Wide)

This control will display all the user's favorites pages as buttons. If the user does not have a restricted home page and they do have the "EDIT HOME PAGE" privilege, they will be allowed to make changes to the favorites. This control allows the addition of external links as well as M5 frames to the favorites. This version of the control is full screen width.

User Notifications

This control will display all the user's notifications received in the last number of days. The number of days is an adjustable parameter. This control gives the user the option to mark the notification as read which simply removes it from this list.

My Reports and My Reports (Wide)

This allows for a button or link to display a list of saved report parameter pages. It will display, on the home page, all saved report parameter pages saved by the application user. If the user selects the button or link, the report filter page will appear with their specific parameter page displayed.

Latest Exchange Rate

This control displays the latest exchange rates. This can only be used if you have installed and are using the multi-currency features of M5.

M5 Search

This control is a basic search tool for M5. It can find information about units, work orders and such.

Shop Activity

Show what employees are logged on to work order or indirect accounts for a location or location group.



Open Jobs by Status

Show counts by job status of open jobs for a location or location group.

- 🔽 Open John Ry Statue 🗖 🙆 🕇	
Show counts by job status of open jobs for a location or location group.	
Open Jobs By Status	
Example Data	
Waiting for Parts (50)	
Waiting for Assignment (48)	
48 At Vendor (20)	
20	
50	
FM - FM Parking Location	

Work Request Completion

Shows work request completion for the previous year for a location or location group.

System Activity

Shows active users, active sessions, and server requests for the last 24 hours. The RECORD_PERFORMANCE parameter must be **Y** for this control to function and appear on the homepage.

3. Organize Tab

The next step in the screen design process is to organize the frame or sequence the Controls when displaying this frame to the users. Select the Organize tab.

SAVE UNDO REFRES	H DELETE FIND	ATTACH RELATED ~	
Screen Designer			
General Information			
Screen Name: D	escription:		
NEW HOMEPAGE	IEW HOME PAGE		
Allow User Customization:	oundation:		
No V	Home Page	¥	
Assemble Organize			
Sequence the components of this screen.			
The second lower to still down		daha alianana askisan Oshisanan	As in the Ulferrary of Title I
None Intersection and "Content" areas below w	ill be part of the screen.	a the alignment options. Only componer	its in the Key and Hite
Color Scheme:			
Classic M5 🗸			
Control Positions:			
Key and Title	e		
Screen Title Key Block			
Notify Even	ts		
	*		
Unused Content	.→ Unused		
Home Page	Favorites	+	
Dashboard	Meter (instance 5)		

Theme

The Theme is used to determine how the Controls are presented on the frame. The dropdown options are:

- None: All selected Controls will display on one page (recommended for home page).
- Pane: Displays each Control in a separate box-like area.
- **Tab**: Displays in the traditional M5 tab layout.
- **Accordion**: Displays each defined tab one row after another. The user will need to select the accordion row displayed.

Color Scheme

The color scheme choices are classic M5 and portal. Classic M5 shows a faint border around each control whereas the portal design has no border.

Control Arrangement

The Key and Title are not re-sequenced on any pane. Some controls can only be placed at the top of the frame such as the Key Block Control. It is normally the key information for the frame. Hyperlinks may be another example, so they are visible no matter what tab is displayed.

None Theme

The frame layout will depend only on the size of the components and the alignment options. Only the middle section called content, needs to have each control added.

Assemble	Organize		
~ Sequence	e the components of th	nis screen	
Theme None	The screen la and "Content"	ayout will depend only on the size of the " areas below will be part of the scree	he components and the alignment options. Only components in the "Key and Title" en.
Color S Classic	Scheme: c M5 ✓		
Contr	al Positions:		
Conti	or Positions.	Key and Title	
		Screen Title Key Block	1
		Notify Events	
Unused	±	_→ Content	→ Unused
	1	Home Page Favorites Dashboard Meter (instance 5)	
		 Open Jobs By Status Shop Activity 	* * * *
		Work Request Completion	+

Pane Theme

This frame layout will have three vertical panes all visible at the same time. Each pane takes only a portion of the visible frame. It provides for three panes: Left, Main, and Right. This theme is recommended for the M5 home page.

Assemble Organize
C Sequence the components of this screen.
Theorem
Pane
Classic M5 V
Control Positions
Key and Title Screen Title
Key Block Notify Events
· · · · · · · · · · · · · · · · · · ·
Left Pane 😝 Main Pane 😝 Right Pane
A Home Page Favorites
Dashboard Meter (instance 5)
Open Jobs By Status
Shop Activity
Work Request Completion

The left and right directional arrows permit the designer to move the panes from their current location to another one. This is also referred to as a Pane Swapper. This only makes sense if the pane contains data that is narrow when displayed. Hovering the mouse over the directional arrows will also provide frame tip information.

Control Positions:			
	Key and Title Screen Title Key Block Notify Events	↑ ↓	
Left Pane	Main Pane Home Page Favorites Dashboard Meter (instance 5) Open Jobs By Status Shop Activity System Activity Work Request Completion	<pre></pre>	★

Or use the right and left directional arrows to move the Controls from one pane to another. This is also referred to as a Control Swapper.

The up and down directional arrows permit the designer to move or re-sequence the Controls within a pane.

Tab Theme

This is the traditional M5 tab layout. A frame can have up to eight tabs. Each tab can be viewed individually. The Screen Designer will create an All Tabs. When entering the "Tab" theme for the first time, the default is to put all controls in the second tab. There must be at least one control in the first tab as you cannot have a second tab without a first tab. The contents of each tab are determined by the positioning of the components in the areas below. The tab title can be entered in the input field above the controls.

Assemble Organize
Sequence the components of this screen.
Theme: The screen will have up to eight tabs that will be as wide as the screen. Each tab can be viewed individually. The contents of each tab is determined by the positioning of the components in the areas below. The title of the tab can be entered in the input field
Color Scheme:
Control Positions:
Key and Title
Notify Events
Shop Activity Home Page Favorites Dashboard Meter (instance 5) Image: Comparison of the state of the st
Work Request Completion
* * *

To add a title to the tab, enter the information in the blank space above each tabbed area. The title can contain up to 20 alphanumeric characters.

The up and down directional arrows allow for re-sequencing of data within the Tab as well as moving the Controls from one tab section to another one using the right and left directional arrows.

Accordion Theme

The accordion theme is displayed to the designer exactly as the tab theme. The only difference is what the user will see when accessing the form as shown earlier in the document.

ssemble Organize	
Sequence the components of this screen	
Theme: The screen will have up to eight vertical tabs that will collapse so only one at a time is visible. The contents of each tab is	
Accordion above each of the areas.	
Color Scheme: Classic M5 🗸	
Control Positions:	
Key and Title	
Key Block	
Notify Events	
Shop Activity Home Page Favorites	
Dashboard Meter (instance 5)	
• • • •	

4. Preview Mode

When the screen designed is finished use the radio button to use the Preview Mode to make sure the frame layout is as expected.

SAVE UNDO	REFRESH DELETE FIND ATTACH	RELATED V
Scroon Designe	r	
Screen Designe	1	
General Information		
Screen Name:	Description:	
NEW HOMEPAGE	NEW HOME PAGE	
Allow User Customization:	Foundation:	
No 🗸	Home Page 👻	
Assemble Organize		
Mode: C Eabrication	Preview (shortcut key = ALT-P)	
mode. C rabicator	Analye	
Control help text example		
Welcome.		
,		
My Favoritaa		Work Dequest Completion
wy ravontes		Example Data
Sample Frame 1 Sample Frame	2 Sample Frame 3 Sample Frame 4 Sample Frame 5 Sample Fra	ame 6 150
		110
		ti ili ili ili ili ili ili ili ili ili i
		2 75
		→ On Time

The final step is to select the SAVE icon to finalize your changes.

5. Published Screen Changes Considerations

M5 Security

When the new frame is created, it is automatically added to Frame Maintenance. All custom screens are published under /PRESENTATION/SCREENDESIGNER. If the foundation frame was DAF enabled, the new frame will be as well. The home page foundation is not DAF enabled.

Frame Maintenance

SAVE UNDO REFRESH DELETE FINE	D
Frame Maintenance	
Report and Frame Information URL:	
Type: Audit: Frame • No •	
Prohibited On Menu: Disab	led:
Description: NEW HOME PAGE Help URL:	
Authorized With URL: PUBLIC	
Component Name: mfiveUCHomePage.dll	
Dept. Access Function:	
Default Menu:	
Added In Version:	
Menu List Related Hyperlinks	

The frames created by Screen Designer, after saved, create records in Frame Maintenance.

Menu Maintenance

The new frame must be added to a menu by using Menu Maintenance so it can be accessed. Menus are assigned by using Role Maintenance. Security templates can be applied to screen designer frames.

SAVE UNDO	REFRESH	DELETE	FIND		
Menu Mainten	Menu Maintenance				
Filter	×				
	Authorization Group	Security Level Read / Update / Full	Security Template	Reauthenticate on save	
E-G ROOT					
÷ —					
	<				

Updates

Release	Section	Description
23.2	All sections	Applied miscellaneous writing style updates throughout the document.