



Screen Designer Overview

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Technical Support

AssetWorks provides several ways to connect with the Customer Support team. Be prepared to provide detailed information to the representative. If you are reporting an issue by email, include screen shots of your problem. This will provide the Customer Support representative with the information needed to respond quickly and effectively.

Customer Support is available Monday through Friday, 7:00 a.m. to 7:00 p.m., Eastern Time.

Telephone: 1-610-225-8300

Email: M5Support@AssetWorks.com

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.

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Overview

- Screen Designer allows you to develop and customize certain frames in M5 to fit your business needs.
- You can reorder, add, and remove fields.
- It also provides an additional level of security beyond the Field Security Template functionality as the custom frames can show limited views of data and you can remove certain fields deemed sensitive.
- For example, you may want to create two different Work Order Main frames: one with limited data for a certain group and one with access to more data for another group.
- This module requires an additional license.

Available Screen Designer Foundations

- Accident – Department
- Accident – Unit
- Booking Appointments
- Comm Part Charges
- Customer Unit View
- Customer View Work Order Detail
- Direct Invoice
- Director
- Employee
- Home Page
- Incident
- Message Editor
- Motor Pool Driver Profile
- Motor Pool Reservation
- Motor Pool Reservation Calendar
- Portal Logon
- Unit Attachment Query
- Unit Maintenance

- Unit Maintenance (no creation)
- Work Order
- Work Request Query

1. Screen Designer Basics

SAVE UNDO REFRESH DELETE FIND RELATED ▾

Screen Designer

General Information

Screen Name:

Description:

Allow User Customization:

No ▾

Foundation:

? ▾

Assemble

Organize

Creating a screen

SAVE
UNDO
REFRESH
DELETE
FIND
ATTACH
MORE ▾
RELATED ▾

Screen Designer

General Information

Screen Name:

ACCIDENT (EXAMPLE)

Description:

Accident Example

Allow User Customization:

No ▾

Foundation:

Accident - Unit ▾

Assemble

Organize

Mode:

☒ Fabrication
 ☐ Preview (shortcut key = ALT-R)
 ☐ Arrange

Screen Summary

Search

☒ Screen Title
 ☒ Key Block
 ☐ Unit

☐ Insurance
 ☐ Driver
 ☐ Multiple parties

☐ Multiple registrations
 ☐ Trip
 ☐ Trip Question

☐ Accident Detail
 ☐ Condition
 ☐ Witness

☐ Police Information
 ☐ Claim
 ☐ Multi Claims

☐ Payments
 ☐ Work Order
 ☐ Vendor Estimate

☐ Work Requests
 ☐ Attachments
 ☐ Item (instance 1)

☐ Item (instance 2)
 ☐ Item (instance 3)
 ☐ Item (instance 4)

1. Enter a **Screen Name**, limited to 30 alphanumeric characters. Must be unique.



When creating a new frame, you receive a prompt letting you know the frame does not exist. Select **Create** to confirm the action.

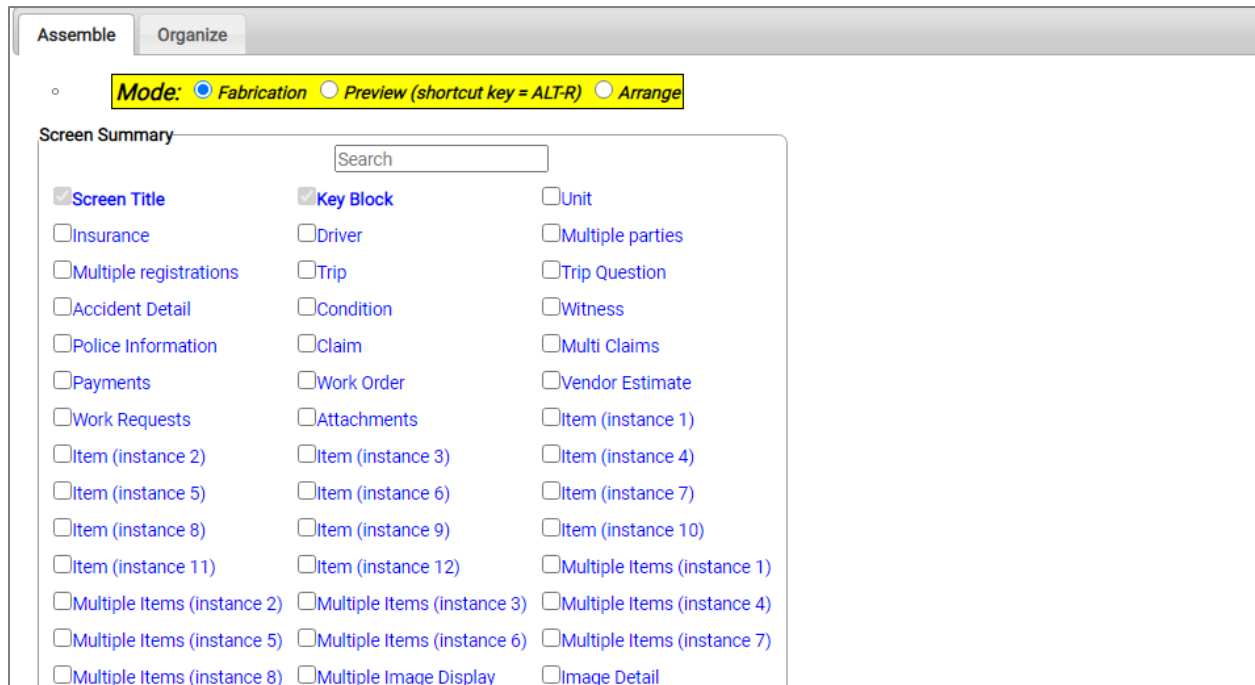
2. Enter a **Description**, limited to 60 alphanumeric characters.
3. **Allow User Customization** Y/N dropdown.
4. Select a **Foundation**. For example, Work Order Main. The foundational frame is the frame in M5 you want to customize using screen designer.



Only select M5 frames are available in this module.

5. After you select a foundation, M5 will save the new frame automatically and load the frame **controls** on the **Assemble** tab.

Navigating the Assemble tab



- **Mode** – Radio buttons:
 - You begin in **Fabrication** mode by default. You will select and configure available controls using this mode.
 - **Preview** allows you to see a sample of what your design will look like when implemented in M5.
 - **Arrange** allows you to rearrange controls to further customize the frame layout and appearance by using drag and drop functionality.
- **Screen Summary** – This section contains a list of all available controls for the selected foundation. You can select the checkbox next to a control to add it to your frame.
 - Each foundation has a different set of controls.
 - Any mandatory controls will already be selected.
- **Preview User Controls** – You can view each control individually if you scroll past the Screen Summary section.
 - You can also select a checkbox to add the control to the foundation.
 - Included controls are outlined in blue. Excluded controls are outlined in red.

Control Options

The screenshot shows the 'Screen Designer' interface. At the top, there is a toolbar with buttons: SAVE (orange), UNDO, REFRESH, DELETE, FIND, ATTACH, MORE (dropdown), and RELATED (dropdown). Below the toolbar, there are two control panels. The first panel is titled 'Screen Title' and has a checkbox, a magnifying glass icon, a question mark icon, and an up arrow icon. The second panel is titled 'Key Block' and is highlighted with a red rectangle; it also has a checkbox, a magnifying glass icon, a question mark icon, and an up arrow icon. Below the 'Key Block' panel, there is a form titled 'Accident Information' with fields for 'Accident:', 'Unit:', 'Entry Date:', and 'Alternate Unit No.:'. The 'Accident:' field has an 'Add Accident' button. Below the 'Accident Information' form, there is a third panel titled 'Unit' with fields for 'VIN Number:', 'Owning Dept:', 'Using Dept:', 'License No:', 'License State:', 'Operator:', 'Name:', and 'Operator Dept:'.

- Each control has up to four options at the top:
 - **Checkbox** (box next to control name) – To add/remove control from design.
 - **Property Sheet** (magnifying glass) – To edit any control-specific features, for example displaying the Add New Accident button or hiding it.
 - **Control Help** (question mark) –To add on-screen text help to a control.
 - **Return to screen summary** (up arrow) – To return to the top of the Assemble tab.



The Property Sheet is not available for every control. It only displays when available.

Navigating the Organize Tab

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

The screenshot shows the 'Screen Designer' application with the 'Organize' tab selected. At the top, there is a toolbar with buttons: SAVE, UNDO, REFRESH, DELETE, FIND, ATTACH, and a dropdown menu labeled RELATED. Below the toolbar, the 'Screen Designer' title is followed by a 'General Information' section. This section contains two columns of fields: 'Screen Name' (NEW HOMEPAGE), 'Description' (NEW HOME PAGE), 'Allow User Customization' (No), and 'Foundation' (Home Page). Below this is a tabbed interface with 'Assemble' and 'Organize' tabs. The 'Organize' tab is active, showing a section titled 'Sequence the components of this screen.' This section includes a 'Theme' dropdown (set to None) with a descriptive text: 'The screen layout will depend only on the size of the components and the alignment options. Only components in the "Key and Title" and "Content" areas below will be part of the screen.' Below the theme is a 'Color Scheme' dropdown (set to Classic M5). The main area is titled 'Control Positions:' and displays a visual arrangement of controls. At the top is a 'Key and Title' container with a list: Screen Title, Key Block, and Notify Events. Below this are three main columns: 'Unused', 'Content', and 'Unused'. The 'Content' column contains a list: Home Page Favorites, Dashboard Meter (instance 5), and Open Jobs By Status. Blue arrows indicate the sequence and relationship between these control areas.

Theme

The Theme is used to determine how the Controls are presented on the frame. The choices from the dropdown list 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

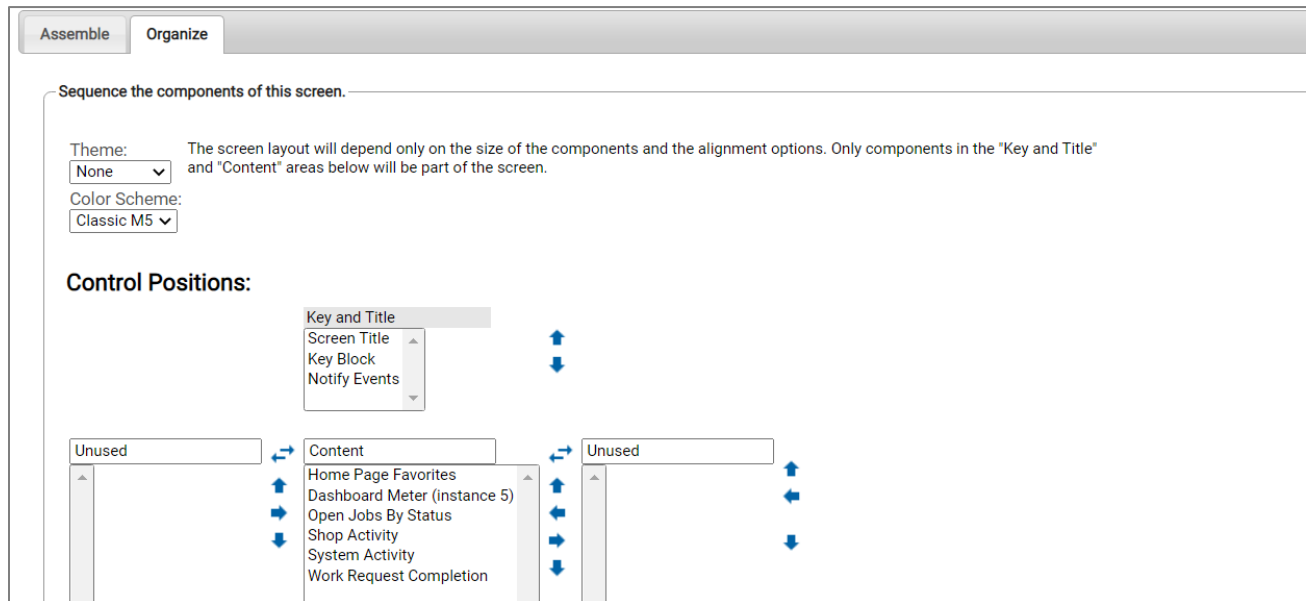
The color scheme choices are classic M5 and portal. Classic M5 shows a faint border around each control whereas the portal design has no border.

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.

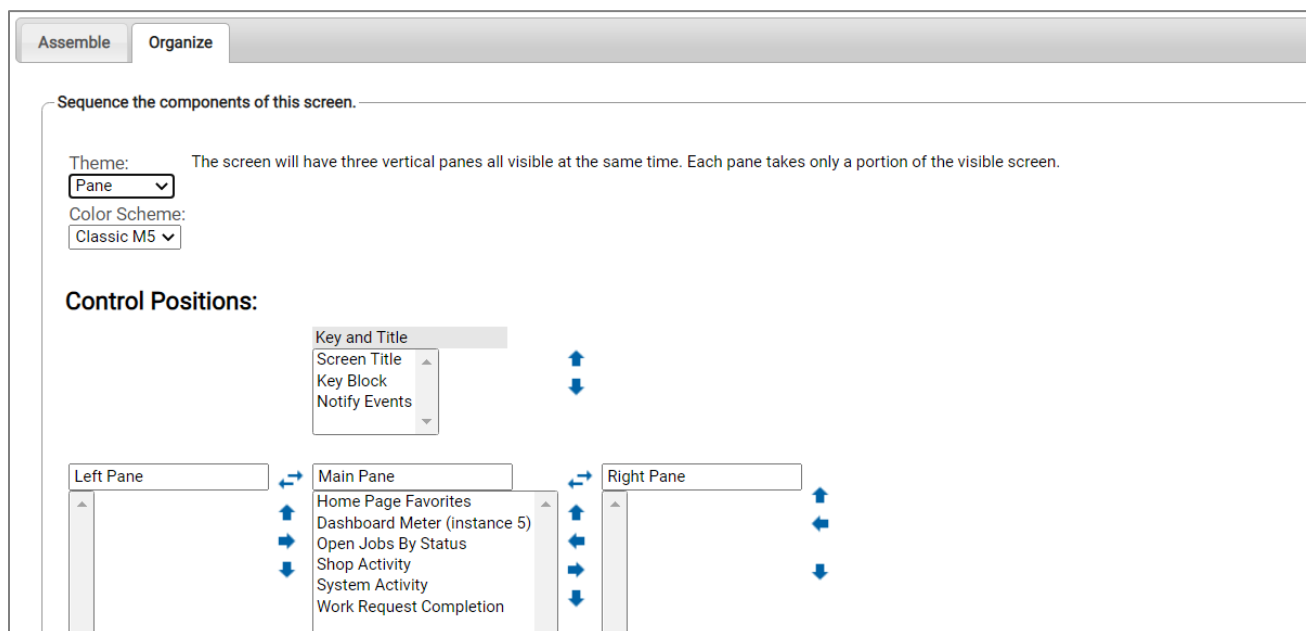
None Theme

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.

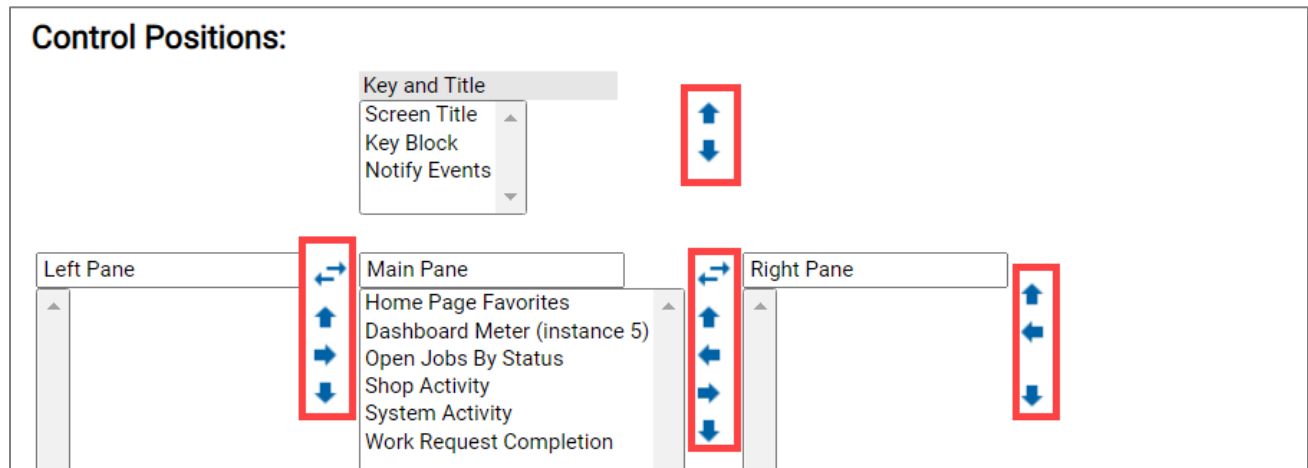


Pane Theme

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 three panes: Left, Main, and Right. This theme is recommended for the M5 home page.



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 screen tip information.

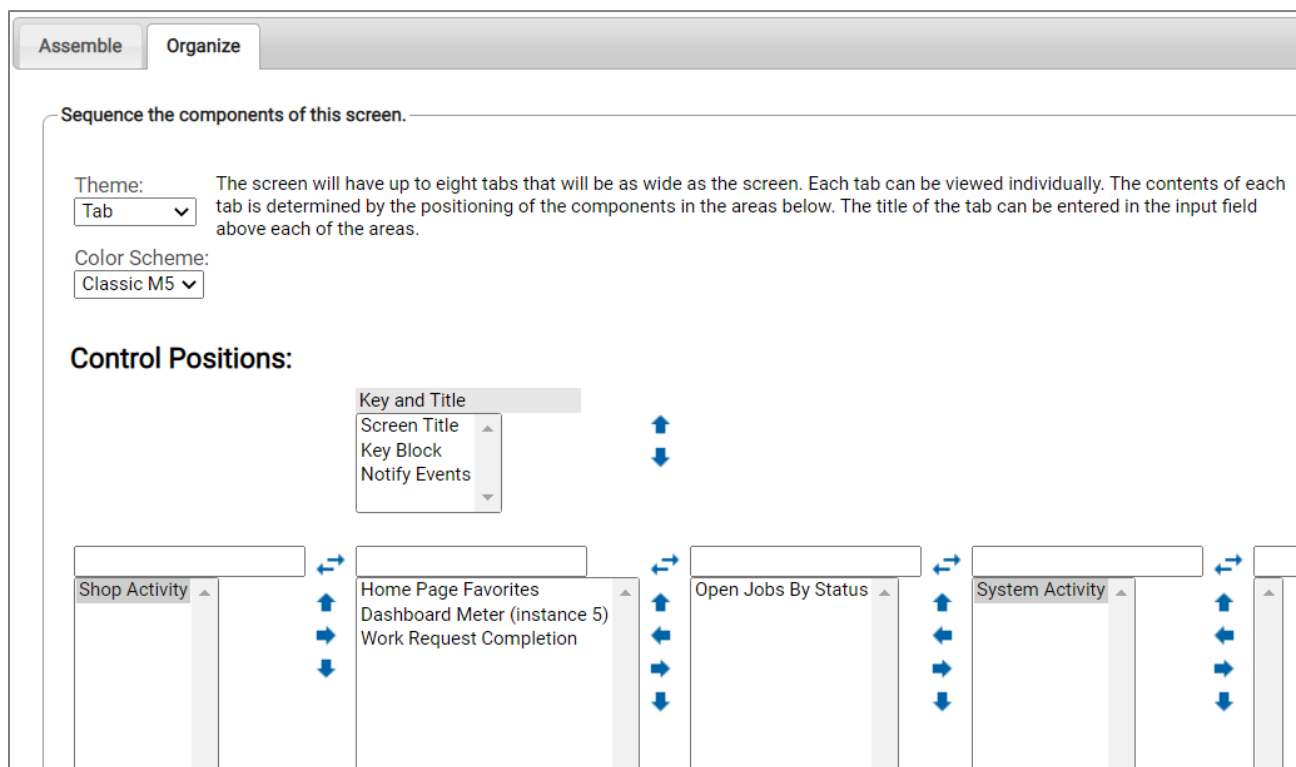


Or use the right and left directional arrows to move the Controls from one pane to another. This is also referred to as a Control Swapper.

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.

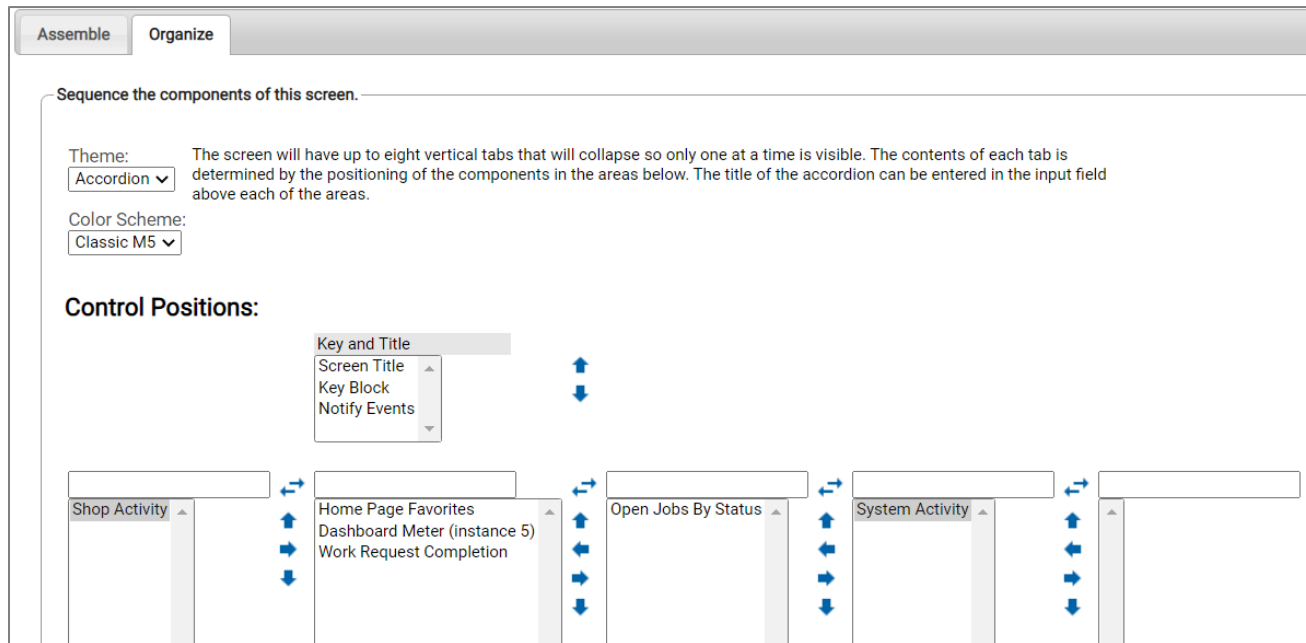


To add a title to the tab, enter the information in the blank space above each tabbed area. The title can contain up to 20 alphanumeric characters.

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.



2. Preview Mode

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

The screenshot shows the 'Screen Designer' application interface. At the top, there is a toolbar with buttons: SAVE, UNDO, REFRESH, DELETE, FIND, ATTACH, and RELATED (with a dropdown arrow). Below the toolbar, the title 'Screen Designer' is displayed. Underneath, there is a 'General Information' section with two columns of fields. The left column contains 'Screen Name:' with the value 'NEW HOMEPAGE' and 'Allow User Customization:' with a dropdown set to 'No'. The right column contains 'Description:' with the value 'NEW HOME PAGE' and 'Foundation:' with a dropdown set to 'Home Page'. Below this section, there are two tabs: 'Assemble' and 'Organize'. Under the 'Organize' tab, there is a 'Mode:' section with three radio buttons: 'Fabrication', 'Preview (shortcut key = ALT-R)' (which is selected and highlighted with a red box), and 'Arrange'. Below the mode section, there is a text field labeled 'Control help text example...'. The main design area displays a 'Welcome, [blurred text]' message. Below the welcome message, there is a 'My Favorites' section with a list of links: 'Sample Frame 1', 'Sample Frame 2', 'Sample Frame 3', 'Sample Frame 4', 'Sample Frame 5', and 'Sample Frame 6'. To the right of the 'My Favorites' section, there is a 'Work Request Completion' chart titled 'Example Data'. The chart is a grid with a y-axis labeled 'K Requests' ranging from 75 to 150 and an x-axis with four columns. A legend at the bottom right of the chart shows a green square labeled 'On Time'.

SAVE UNDO REFRESH DELETE FIND ATTACH RELATED ▾

Screen Designer

General Information

Screen Name: NEW HOMEPAGE Description: NEW HOME PAGE

Allow User Customization: No ▾ Foundation: Home Page ▾

Assemble Organize

Mode: ☐ Fabrication ☒ Preview (shortcut key = ALT-R) ☐ Arrange

Control help text example...

Welcome, [blurred text]

My Favorites ✎

[Sample Frame 1](#) [Sample Frame 2](#) [Sample Frame 3](#) [Sample Frame 4](#) [Sample Frame 5](#) [Sample Frame 6](#)

Work Request Completion
Example Data

K Requests

150				
113				
75				

On Time

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

3. Published Screen Changes Considerations

M5 Security

When the new frame is created, it is automatically added to Frame Maintenance. All custom frames 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

The screenshot displays the 'Frame Maintenance' interface. At the top, there are five buttons: 'SAVE' (blue), 'UNDO' (grey), 'REFRESH' (blue), 'DELETE' (blue), and 'FIND' (grey). Below these buttons is the title 'Frame Maintenance'. The main area contains a form titled 'Report and Frame Information'. The form fields are as follows:

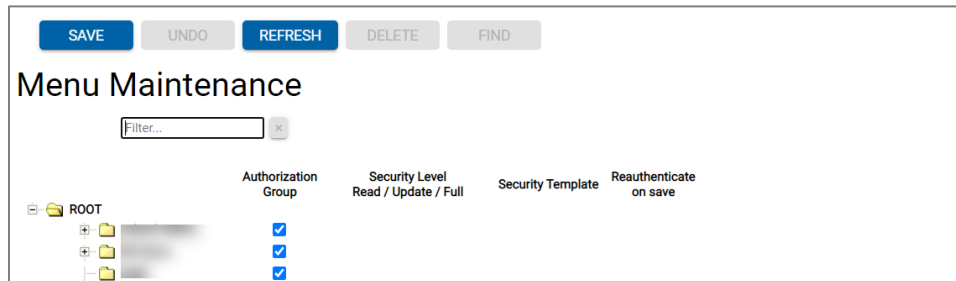
- URL: /PRESENTATION/SCREENDESIGNER/PROCESS.ASPX?INFO=NEW HOMEPAGE
- Type: Frame (dropdown menu)
- Audit: No (dropdown menu)
- Prohibited On Menu: No (dropdown menu)
- Disabled: No (dropdown menu)
- Description: NEW HOME PAGE
- Help URL: (empty text box)
- Authorized With URL: PUBLIC
- Component Name: mfiveUCHomePage.dll
- Sticky Fields: (empty text box)
- Dept. Access Function: (empty text box)
- Default Menu: (dropdown menu)
- Added In Version: (empty text box)

At the bottom of the form, there are two tabs: 'Menu List' (active) and '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.



Updates

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