# AssetW**O**RKS

# Screen Designer – Work Order

**Application Training** 

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# Screen Designer – Work Order - 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 may use different business components (application programs). Foundation frames are defined by AssetWorks. A newly designed frame may 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 – Work Order

SAVE UNDO R	EFRESH DELETE FIND	ATTACH RELATED ~					
creen Designer							
General Information							
Screen Name:	Description:						
NEW WORK ORDER MAIN	NEW WO MAIN						
Allow User Customization:	Foundation:						
No 🗸	Work Order	*					
Assemble Organize							
MOGE: Fabrication Pr Screen Summary Sec	eview (shortcut key = ALT-R) Arrange						
Screen Title	Key Block	Work Request List					
Work Request Plan List	Work Order Information	Visit Information					
Worker Order Express Complete, Clos	se and Cancel Meter Information	Contact Information					
Cost Summary	Cost Summary (Wide)	Misc Links					
Job Information	Labor Charge Information	Commercial Charge Information					
Stock Part Charge Information	Comm Summary	Authorized Comm Amounts					
Fluid Charge Information	Material Summary	□Non-Stock Part Charge Information					
Equipment Condition	Attachments	Multiple Image Display					
Image Detail	Break (Instance 1)	Break (Instance 2)					
Break (Instance 3)	Break (Instance 4)	Break (Instance 5)					
Break (Instance 6)	Break (Instance 7)	Break (Instance 8)					

### Assemble Tab

#### **Overview of Controls**

- Controls are small pages of information.
- Each group of related fields is a separate Control. The 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 the control. These are set by AssetWorks if the data must be present for the business logic to function.

#### **Adding Controls**

 To create a custom Work Order Main frame, enter a Screen Name, Description and select Work Order from the foundation dropdown. After SAVE, verify that you are on the Assemble tab of the frame.

SAVE UNDO REFRESH	DELETE FIND	ATTACH RELATED ~					
Screen Designer							
General Information							
Screen Name: Des NEW WORK ORDER MAIN NE	cription: WWO MAIN						
Allow User Customization:	ndation: ork Order	v					
Assemble Organize	Assemble Organize						
• Mode: • Fabrication • Preview (sho	rtcut key = ALT-R) O Arrange						
Screen Summary Search							
Screen Title	Key Block	Work Request List					
Work Request Plan List	Work Order Information	Visit Information					
Worker Order Express Complete, Close and Can	cel Meter Information	Contact Information					
Cost Summary	Cost Summary (Wide)	Misc Links					

- 2. There are two modes with radio buttons: *Fabrication* and *Preview*. Select the *Fabrication* radio button when adding controls to the frame. Select the *Preview* radio button to review the custom frame that was designed. There are two sections for the *Fabrication* radio button:
  - Screen Summary
  - Preview Control
- 3. **Screen Summary** section Controls that are required on this frame are automatically selected. The controls can be selected by selecting the checkbox in front of the specific controls.
- 4. **Preview Control** section Select a control by selecting the checkbox next to it. You can double-click on the control to quickly navigate to the control further down the frame.
- 5. Any control selected displays 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. After the checkbox is selected the square is 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	
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	
links as well as MS frames to the favorites.	xternal
My Favorites 🖍	
Sample Frame 1 Sample Frame 2 Sample Frame 4 Sample Frame 5 Sample Frame 5	

6. Select the **Property Sheet** icon for the selected control.

Π.	denned.								
	show/hide	e 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	acter							
			A value of L means the favorite will be displayed as a link. B means button. The default is L						
	Orientation Char	acter	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.						

7. 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.

In the example below, color, text and images can be added or changed on the frame being developed.

SAVE	REFRESH	DELETE FIND ATTACH RELATED ~
Screen Title . 🝳 😧	<b>•</b> —	
- Property Sheet	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 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

#### Adding Help Text to a Control

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



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

#### Adding Fields to a Frame

Custom user fields are added to the frame as items. Items reside in a separate table. There are two controls for adding items:

- Individual Finite number per frame set by the Foundation.
- Multiple One control and repeating rows for as many items are needed.
- 1. To add a new field to the frame, that item must be set up on the *Item Master Definition* frame. The item **Type** must be *Work Order*. In this example, a new item will be added for Trailer Full Y/N.

SAVE UND		ESH	DELETE	FIND				
tems master Definition								
tem Selection Type: Work Order								
Vork Order Item Information	(New record numb	oer 17)						
Item	Туре		Mandatory Item	Validated Value	Default Value	Disabled	•	
PO NBR	Charac	ter 🗸						
RM 1	Charac	ter 🗸	<b>Z</b>	<b>Z</b>	TEST 4			
WIRES	Numbe	er 🗸			3			
WO UNIT STATUS	Charac	ter 🗸	<b>~</b>	<	Test1			
WRENCHES	Charac	ter 🗸						
Trailer Full Y/N	Charac	ter 🗸						
							*	
			Item	n is not valida	ted (Loaded 0 records)			
		Value						

 The next step is to navigate to the Screen Designer frame to add this item to the custom frame. Multiple items can be added by first selecting a *Multiple Items Instance* in Screen Summary or go directly to the *Preview Control* section.

When a *Multiple Items Instance* is first selected, select the **Property Sheet** icon. By selecting *Items*, the user can select the items to display on the frame.

For example, if there is more than one work order item that should be displayed as a group, then use this option. Controls called Item (instance 1 thru 12) allow for only one work order item to display as a field.

3. The Order sets the sequence of the items in the control. The Description is the field label the user will see on the frame. It is case sensitive. Double-click in the Item Name to select the corresponding work order item. The dropdown is used to view a list of values by selecting the down arrow. Always Required makes the field required on the new frame If the item has a list of values and Drop Down is not selected, the user will be able to double-click in the field to search by using the List of Values (LoV).

Record 3 of 3)						
n Description	Item Name		Always Required	Mixed Case	Drop Down	 1
1 WO UNIT STATUS	WO UNIT STATUS	¥				
2 WRENCHES	WRENCHES					
3 TRAILER FULL Y/N	TRAILER FULL Y/N	*				
		*				
		v				

#### Adding the Version Number

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

SAVE UNDO	REFRESH	DELETE FIND ATTACH RELATED ~
Property Sheet	T	
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.

# 2. Work Order Foundation Controls

### **Screen Title**

Screen Title 👩 🙆 🕇		
Property Sneet		
Attribute	Format	Value
Version	Character	
		Optional version number to be shown in the Tool Tip.
Orana harden and a day	Observation	
Screen background color	Character	Poolegaund solar for the new second the promotion of the second solar language for the terms of the maximum to the second solar so
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 ton/bottom %	Integer	
inage poonton top, bottom to	integer	Used to position a non-repeating background image. 0=Top 100=Bottom
User defined help bg color	Character	

The **Screen Title** control allows you to 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.

### **Key Block**

_				
Ι.	Key Block 👩 🙆 🕇	·		
	Property Sheet			
	Attribute	Format	Value	
	Title	Character		
			Enter the title you want to appear above the key block.	J
	Key field label	Character		
			Enter the text to be displayed to the left of the key entry field.	
	Secondary page	Character		
	cocontail) page		Enter a Y to automatically query the current work order number. This can only be done fo	or secondary pages on a multiple page work order design.
	Query By Work Order Number	Character		]
			Enter an N to prevent a work order number from being use to query from the key block. T	The default is Y. Note: If you allow work order query, only work
			orders for the types unit, department, component that are selected below will be anowed	
	Query By Unit Number	Character		
			Enter an N to prevent a unit number from being use to query from the key block. The defa	ault is Y.

The **Key Block** control allows the name of the section to be changed, the *Key field label, Secondary page* and search query information that allows you to specify what objects can be queried and created by the frame (wo number, unit number, department number, component number). Additionally, this allows a specific work order frame to be designed for departments but excludes units.

### **Work Request List**

Work Request List	a 🕇 -	
Property Sheet	-	
Attribute	Format	Value
Auto Open Work Request List	Character	Show Y=Yes, N=No, (Default is No)
Display Work Plans	Character	Show Y=Yes, N=No, When set to Y will display work plan number for each work request, as well as additional jobs that are on each work plan. (Default is No)
Display Defect Info	Character	Show Y=Yes, N=No, When set to N will hide the Defect Number and Cannot be Driven fields. (Default is Yes)

#### Attributes:

- Auto Open Work Request List
- Display Work Plans
- Display Defect Info

#### Value

Displays a pop-up when the work order is entered. The pop-up that appears displays outstanding work requests with the ability to add as jobs to the work order. The **Work Request List** link displays on the *Work Order Main* frame.

- Auto Open Work Request List Show Y=Yes, N=No, (Default is No).
- **Display Work Plans** Show Y=Yes, N=No, When set to Y will display work plan number for each work request, as well as additional jobs that are on each work plan. (Default is No).
- **Display Defect Info** Show Y=Yes, N=No, When set to N will hide the Defect Number and Cannot be Driven fields. (Default is Yes).

#### Work Request Plan List

**Work Request Plan List** is an optional feature in M5 that groups work requests together. There is no property sheet for this control and the control will display as a hyperlink on the *Work Order Main* frame.

### Work Order Information

Work Order Information	<b>Q</b>	<b>1</b>	
Broparty Shoot			
Froperty Sneet			
Attribute	Format	Value	
Work Order Information label	Character		
		Enter the title you want to appear above the Work Order Information block	
		Enter the title you want to uppear above the work order monnation block.	
Reason	Character		
neucon	onaraotor	Show Y=Yes N=No (Default is No)	
Tech Spec	Character		
reen opee	onaraotor	Show Y=Yes N=No (Default is No)	
Alt Unit Number	Character		
,	cinaracter	Show Y=Yes N=No (Default is No)	
Title Number	Character		
		Show Y=Yes, N=No, (Default is No)	

The Work Order Information control contains the header information for the Work Order Main frame with fields for Unit/Department/Component or Work Order number, WO Status, Location, Unit/Department/Component Status and VIN number.

- Work Order Information label To change the label for the control. Enter the title you want to appear above the Work Order Information block.
- **Reason** The work order reason and Show Y=Yes, N= No, (Default is No).
- Tech Spec, Alt Unit Number, and Title Number Show Y=Yes, N= No, (Default is No).

### **Visit Information**

Visit Information	0 0 1	Group=Work Order Close control
Property Sheet		
Attribute	Format	16 ha
Attribute	Format	value
WO Reference	Character	Y Ohaw M. Van MMa (Default in V)
		Show Y=Yes, N=NO, (Default is Y)
Equipment Profile	Character	
		Show Y=Yes, N=No, (Default is No)
Complete WO Signature	Character	
		Show Y=Yes, N=No, (Default is No)
ni Teorio e teori		1
Visit Information	n	
Reason:		
Open:		
	Q	
Completed:		
Complete		
Complete		
Closed:		
Closed		
Due:	-	
	Q	
Downtime:		
Est Complete:		
WO Deferrer		
WO Reference:		
Parking Loc:		

The Visit Information control contains the work order fields: Reason, Open date, Completed date, Closed date, Due date, Downtime, Est Complete date, WO Reference, and Parking Loc.

#### Attributes:

- WO Reference
- Equipment Profile
- Complete WO Signature

#### Value

Show Y=Yes, N=No (Default is No)

### Work Order Express Complete, Close, and Cancel

	er Order	Express Complete, Clo	se and Cancel	. 🙋 🕜 🕇 Group=V	Vork Order Close cont	rol	
Fields (L	oaded 0	records)					
Order	Field	Override Description	Field width %	Always / Drill / Hidden R	See Legacy equired Mod Flag		
Corr	nplete	Close	Cancel				

The **Work Order Express Complete, Close, and Cancel** control is used when building work order express frames only. It cannot be added if the **Visit Information** control is on the frame.

#### **Meter Information**

Meter Information		
		<b>v</b> -
Property Sheet		
Attribute Fo	ormat	Value
LTD Open Usage Cl	haracter	
		Show Y=Yes, N=No, (Default is Y)
ITD Maint Coat	horootor	
LID Maint Cost Ci	naracter	Show V=Yes N=No (Default is V)
YTD Maint Cost Ch	haracter	
		Show Y=Yes, N=No, (Default is Y)
Meter Informa	ation	
LTD Open Usage:		
ITD Maint On at		
LID Maint Cost:		

The Meter Information control contains the Meter 1 and Meter 2 fields on work orders.

#### Attributes:

- LTD Open Usage
- LTD Maint Cost
- YTD Maint Cost

#### Value

Show Y=Yes, N=No (Default is Y)

### **Contact Information**

_				
Г	Contact	Information	n 🖸 🙆 🕇 —————————————————————————————————	
	Property Sh	eet		
	Attribute	Format	Value	
	Name	Character		
			Show Y=Yes N=No (Default is Y)	
	Phone	Character		
			Show Y=Yes, N=No, (Default is Y)	
	Ext	Character		
			Show Y=Yes, N=No. (Default is Y)	
	Notified	Character		
	Notified	Character		
			Show Y=Yes, N=No, (Default is Y)	
	Pickup	Character		
			Show Y=Yes, N=No, (Default is Y)	

The Contact Information control Property Sheet Attributes:

- Name
- Phone
- Ext
- Notified
- Pickup

Value

Show Y=Yes, N=No, (Default is Y)

### **Cost Summary**

Cost Summan		2 Croup-Work Order Cost Summary	
Property Sheet		Group=work order cost summary	
Property Sneet	France	1/sha	
Attribute	Format	value	
Limit	Character		
		Show Y=Yes, N=No, (Default is Y)	
Labor Hours	Character		
		Show Y=Yes, N=No, (Default is Y)	
Total Est Hours	Character		
		Show Y=Yes, N=No, (Default is Y)	
Labor	Character		
		Show Y=Yes, N=No, (Default is Y)	
Material	Character		
		Show Y=Yes, N=No, (Default is Y)	

The **Cost Summary** control displays the cost **Limit**, total **Labor** and **Hrs**, total **Material** (parts and products), total **Comm** (commercial), **Total** charges and **Total Est Cost** and **Hrs** fields.

#### Attributes:

- Limit
- Labor Hours
- Total Est Hours
- Labor
- Material

#### Value

Show Y=Yes, N=No, (Default is Y)

### Cost Summary (Wide)

[	Cost Summary	(Wide)	🧕 😧 🕇 Group=Work Order Cost Summary
	Property Sneet		
	Attribute	Format	Value
	Limit	Character	
			Show Y=Yes, N=No, (Default is Y)
	Labor Hours	Character	
			Show Y=Yes, N=No, (Default is Y)
	Labor	Character	
			Show Y=Yes, N=No, (Default is Y)
	Total Est Hours	Character	
			Show Y=Yes, N=No, (Default is Y)
	Material	Character	
			Show Y=Yes, N=No, (Default is Y)

**Cost Summary (Wide)** control offers the same fields, attributes, and values as the **Cost Summary** control with the only difference being the fields are shown horizontal instead of vertical.

## Misc. Links

Misc Links	a 🕇 -	
Property Sheet		
Attribute	Format	Value
Part Reserves	Character	Show Y=Yes, N=No, (Default is Y)
Part Requests	Character	Show Y=Yes, N=No, (Default is Y)
Clear Fault Codes	Character	Show Y=Yes, N=No, (Default is Y)
Part Fabrication	Character	Show Y=Yes, N=No, (Default is Y)
Associated Tech Spec	Character	Show Y=Yes, N=No, (Default is Y)
Warranty Claims	Character	Show Y=Yes, N=No, (Default is Y)
Linked Jobs	Character	Show Y=Yes, N=No, (Default is Y)
Service Orders	Character	Show Y=Yes, N=No, (Default is Y)
Render as buttons	Character	Show Y=Yes, N=No, (Default is Y)

The Misc. Links control contains hyperlinks for widely used functions.

#### Attributes:

- Part Reserves
- Part Requests
- Clear Fault Codes
- Part Fabrication
- Associated Tech Spec
- Warranty Claims
- Linked Jobs
- Service Orders
- Render as buttons

#### Value

Show Y=Yes, N=No, (Default is Y)

### Job Information

Image: Strength Provide the streng									
Property Sneet									
Fields (Loaded	35 records)	)							
Order	Job:	Field	Γ	Override Description	Field width %	Always / Drill / Hidden	Required	See Legacy Mod Flag	
			L				0		
15	Signature:		[			$\bigcirc  \bigcirc  \bigcirc$			
20	Descriptio	n:	[			$\begin{tabular}{ c c c c } \hline \bullet & \bullet & \bullet \\ \hline \bullet & \bullet \\ \hline \bullet & \bullet \\ \hline \bullet & \bullet & \bullet \\ \bullet & \bullet & \bullet \\ \bullet & \bullet & \bullet \\ \bullet & \bullet &$			
30	Zonar:		[						-
Size and Layou	t Attributes								
Attribute		Format	Value						
Frame Heigh	t %	Number					]		
			This adju	usts the heigth of the iframe re	elative to its default	side. A value of 200 (percent)	will double the	size of the fram	<i>ie.</i>
Frame Break		Character					]		

The **Job Information** control contains fields and attributes for every field that exists within the **Job** tab on *Work Order Main*. The order of the fields can be changed, the description of the fields can also be changed, and each field can always be displayed. Drill which means the user must select the job line to display it in a table right below the field or it can be made hidden. It is recommended to make any fields not used hidden, to save frame space and make it easier on users.

- **Frame Height %** Default is 200. *This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.*
- **Frame Break** By default the frame will insert a break and start at the left side of the screen. Enter "N" to not break and allow the frame to be automatically positioned.
- **Drill Height %** Default is10. This adjusts the height of the drill down area relative to its default side. A value of 200 (percent) will double the size of the frame.
- Drill down title The title that will be displayed above the drill down area.
- **Drill down Orientation** Orientation of the drill down area relative to the data frame, V=Vertical, H=Horizontal. Vertical will be below it. Horizontal alongside it. The default is V.
- **Drill down column width** *The number of columns to be shown side by side in the drill down area. The default is 1.*
- Legend or label Displayed on the screen as the label for this signature field.

### Labor Charge Information

Labor Charge	Information . Q	0 1						
roperty Sheet								
Fields (Loaded 1	3 records)							
Order	Field	Override Description	Field width %	Always / Drill / Hidden	Required	See Legacy Mod Flag		
10								
20	Description:							
30 E	Employee No:			$\begin{tabular}{ c c c c } \hline \bullet & \bullet & \bullet \\ \hline \bullet & \bullet \\ \hline \bullet & \bullet \\ \hline \bullet & \bullet & \bullet \\ \bullet & \bullet & \bullet \\ \bullet & \bullet \\ \bullet & \bullet &$				
40	Name:						•	
Size and Layout A	Attributes							
Attribute	Format	Value						
Frame Height %	6 Number				]			
		This adjusts the heigth of the iframe re	elative to its default	side. A value of 200 (percent)	will double the	size of the fram	е.	

The Labor Charge Information control contains fields and attributes for every field that exists within the **Labor** tab on *Work Order Main*. The order of the fields can be changed, the description of the fields can also be changed, and each field can always be displayed. Drill which means the user must select the job line to display it in a table right below the field or it can be made hidden. It is recommended to make any fields not used hidden, to save frame space and make it easier on users.

- **Frame Height %** Default is 200. *This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.*
- **Frame Break** By default the frame will insert a break and start at the left side of the screen. Enter "N" to not break and allow the frame to be automatically positioned.
- **Drill Height %** Default is10. This adjusts the height of the drill down area relative to its default side. A value of 200 (percent) will double the size of the frame.
- Drill down title The title that will be displayed above the drill down area.
- **Drill down Orientation** Orientation of the drill down area relative to the data frame, V=Vertical, H=Horizontal. Vertical will be below it. Horizontal alongside it. The default is V.
- **Drill down column width** *The number of columns to be shown side by side in the drill down area. The default is 1.*

### **Commercial Charge Information**

Commercia	I Charge Information	. 🔯 🔞 🕇 ————					
Property Sheet-							
Fields (Loaded	18 records)						
Order	Field	Override Description	Field width %	Always / Drill / Hidden	Required	See Legacy Mod Flag	Î
10	JOD:						
20	Description:						
25	Service Code:			$\bigcirc  \bigcirc  \bigcirc$			
30	Vendor:			$\boxed{\bullet  \circ  \circ}$			-
Size and Layou	t Attributes						
Attribute	Format	Value					
Frame Height	% Number				]		
		This adjusts the heigth of the iframe r	elative to its default	side. A value of 200 (percent)	will double the	size of the frame.	

The **Commercial Charge Information** control contains fields and attributes for every field that exists within the **Commercial** tab on *Work Order Main*. The order of the fields can be changed, the description of the fields can also be changed, and each field can always be displayed. Drill which means the user must select the job line to display it in a table right below the field or it can be made hidden. It is recommended to make any fields not used hidden, to save frame space and make it easier on users.

- **Frame Height %** Default is 200. *This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.*
- **Frame Break** By default the frame will insert a break and start at the left side of the screen. Enter "N" to not break and allow the frame to be automatically positioned.
- **Drill Height %** Default is10. This adjusts the height of the drill down area relative to its default side. A value of 200 (percent) will double the size of the frame.
- Drill down title The title that will be displayed above the drill down area.
- **Drill down Orientation** Orientation of the drill down area relative to the data frame, V=Vertical, H=Horizontal. Vertical will be below it. Horizontal alongside it. The default is V.
- **Drill down column width** *The number of columns to be shown side by side in the drill down area. The default is 1.*

### **Stock Part Charge Information**

Stock Part	Charge Information	0 0 1					
Fields (Loaded	1 20 records)						
Order 10	Field Job:	Override Description	Field width %	Always / Drill / Hidden	Required	See Legacy Mod Flag	
20	Description:			• • •			
30	Part Number:						
40	Effective Date:						-
ize and Layou	ıt Attributes						
Attribute	Format	Value			_		
Frame Heigh	t % Number	This adjusts the heigth of the ifram	e relative to its default	side. A value of 200 (percent)	will double the	size of the fram	е.
Frame Break	Characte	er 🛛			]		

The **Stock Part Charge Information** control contains fields and attributes for every field that exists for stock parts within the **Part** tab on *Work Order Main*. The order of the fields can be changed, the description of the fields can also be changed, and each field can always be displayed. Drill which means the user must select the job line to display it in a table right below the field or it can be made hidden. It is recommended to make any fields not used hidden, to save frame space and make it easier on users.

- **Frame Height %** Default is 200. *This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.*
- **Frame Break** By default the frame will insert a break and start at the left side of the screen. Enter "N" to not break and allow the frame to be automatically positioned.
- **Drill Height %** Default is10. This adjusts the height of the drill down area relative to its default side. A value of 200 (percent) will double the size of the frame.
- Drill down title The title that will be displayed above the drill down area.
- **Drill down Orientation** Orientation of the drill down area relative to the data frame, V=Vertical, H=Horizontal. Vertical will be below it. Horizontal alongside it. The default is V.
- **Drill down column width** *The number of columns to be shown side by side in the drill down area. The default is 1.*

### **Comm Summary**

Comm Summary 🛛 😧 🔺 —————————————————————————————————									
Commercial Calculations									
Total Labor:	Total Part:	Total Misc:	Total Tax:	Total Cost:	Total Cost With Markup:				

The **Comm Summary** control displays the total fields for all commercial charges, broken down by charge type, that have been applied to a work order. This control does not contain attributes, but help can be added.

lds (Loaded 4 records)					
Order Field 0 Job:	Override Description	Field width %	Always / Drill / Hidden	Required	See Legacy Mod Flag
0 Description:					
0 Vendor:					
0 Amount:					
e and Layout Attributes					

### **Authorized Comm Amounts**

The **Authorized Comm Amounts** control contains fields and attributes for every field that exists for authorizing commercial repairs performed by vendors within the **Comm** tab on *Work Order Main*. The order of the fields can be changed, the description of the fields can also be changed, and each field can always be displayed. Drill which means the user must select the job line to display it in a table right below the field or it can be made hidden. It is recommended to make any fields not used hidden, to save frame space and make it easier on users.

- **Frame Height %** Default is 200. *This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.*
- **Frame Break** By default the frame will insert a break and start at the left side of the screen. Enter "N" to not break and allow the frame to be automatically positioned.

- **Drill Height** % Default is10. This adjusts the height of the drill down area relative to its default side. A value of 200 (percent) will double the size of the frame.
- Drill down title The title that will be displayed above the drill down area.
- **Drill down Orientation** Orientation of the drill down area relative to the data frame, V=Vertical, H=Horizontal. Vertical will be below it. Horizontal alongside it. The default is V.
- **Drill down column width** *The number of columns to be shown side by side in the drill down area. The default is 1.*

lds (Loaded 10	records)				0
Order Jo	Field b:	Override Description	Field width %	Always / Drill / Hidden	Mod Flag
De	scription:				
Jo	b Location:				
lss	ue Date:				
e and Layout At	tributes				

### **Fluid Charge Information**

The **Fluid Charge Information** control contains fields and attributes for every field that exists for charging fluids within the **Fluid** tab on *Work Order Main*. The order of the fields can be changed, the description of the fields can also be changed, and each field can always be displayed. Drill which means the user must select the job line to display it in a table right below the field or it can be made hidden. It is recommended to make any fields not used hidden, to save frame space and make it easier on users.

- Frame Height % Default is 200. This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.
- **Frame Break** By default the frame will insert a break and start at the left side of the screen. Enter "N" to not break and allow the frame to be automatically positioned.
- **Drill Height %** Default is10. This adjusts the height of the drill down area relative to its default side. A value of 200 (percent) will double the size of the frame.

- Drill down title The title that will be displayed above the drill down area.
- **Drill down Orientation** Orientation of the drill down area relative to the data frame, V=Vertical, H=Horizontal. Vertical will be below it. Horizontal alongside it. The default is V.
- **Drill down column width** *The number of columns to be shown side by side in the drill down area. The default is 1.*

#### **Material Summary**

🗹 Material Summary 🛛 🏠 —			
Material Calculations			
Inventory Location: Total Cost:	Total Tax:	Total Discount: Total Extended Cost:	

The **Material Summary** control contains the total fields, by inventory location, for all part and fluid charges issued to a work order. There are no attributes for this control and only help can be added.

#### **Non-Stock Part Charge Information**

Fields (Loaded 24 records)								
Order Field 10 Job:	Override Description	Field width %	Always / Drill / Hidden	Required	See Legacy Mod Flag	Î		
20 Description:								
30 Part Number:								
35 Effective Date:						•		
Size and Layout Attributes								
Attribute Format Frame Height % Number	value This adjusts the heigth of the iframe rel	ative to its default	side. A value of 200 (percent)	will double the	size of the frame.			

The **Non-Stock Part Charge Information** control contains fields and attributes for every field that exists for non-stock parts within the **Part** tab on *Work Order Main*. The order of the fields can be changed, the description of the fields can also be changed, and each field can always be displayed. Drill which means the user must select the job line to display it in a table right below the field or it can be made hidden. It is recommended to make any fields not used hidden, to save frame space and make it easier on users.

#### **Attributes and Values:**

- **Frame Height %** Default is 200. *This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.*
- **Frame Break** By default the frame will insert a break and start at the left side of the screen. Enter "N" to not break and allow the frame to be automatically positioned.
- **Drill Height %** Default is10. This adjusts the height of the drill down area relative to its default side. A value of 200 (percent) will double the size of the frame.
- Drill down title The title that will be displayed above the drill down area.
- **Drill down Orientation** Orientation of the drill down area relative to the data frame, V=Vertical, H=Horizontal. Vertical will be below it. Horizontal alongside it. The default is V.
- **Drill down column width** *The number of columns to be shown side by side in the drill down area. The default is 1.*

#### **Equipment Condition**

Z Equipment Condition 🛛 😧 👚
Equipment Information Equipment Condition: Bin No:

The **Equipment Condition** control contains one field with no attributes available to modify. Help can be added.

## Attachments

Attachments . Q V I								
Using this control the screen designer can create a list of attachments that the user can u	pload and associate with this record. Attachments can be marked as required. This only indicates to the user that the attachment is							
required. The user win be able to save data without the attachment being present. Property Shet								
Title: Title Text:								
Border:								
Attachmente (Leaded Brocerde)								
Conter Description Required								
Attachments								

The **Attachments** control allows for another set of attachments to work orders and these attachments can be made required.

If you want to give this section a title on the form, enter Y in the **Title** field and proceed to give it a description in the **Title Text** field. If you want a border around this section on the form, enter Y in the **Border** field.

Proceed to enter the **Order** you want the attachments to display on the form with a **Description**. This description is the name the user will see on the form. If the attachment is **Required**, select the checkbox.

### **Multiple Image Display**

<b>_</b>	Multiple Image Displ	av 🖸							
	Property Sheet		-						
	Filipenty Sheet								
	Attribute	Format	Value						
	Title	Character							
			Description of this control. Defaults to "Image".						
	Image Width	Number							
			Image display width in pixels. The height will be calculated to maintain a 9X16 (Width X Height) aspect ratio. The default width is 300.						
	Lice Attached Images	Character							
	Use Allacheu innayes	Character	A value of Y will make all ing and pog files that are attached to this record available in this control in addition to any images defined below						
	Image Description 1	Character							
	Imaga File 1	Observator							
	image File T	Character	This is the UDL to extribut the image it may be a full UDL starting with UTTD athenvices it must be in the Standard Images dispatant. The List of Values						
			This is the URL to retrieve the image. It has be a fun ORL starting with HTTP contentwise it must be in the starting on the starting with HTTP contentwise it must be in the starting on the starting with HTTP contentwise it must be a fun to be a fun or starting with HTTP contentwise it must be a fun to be a function. This applies to all the image figure in the starting of values in the starting with HTTP content with the starting with the starting with HTTP content with the starting with the st						
	Image Description 2	Character							

The **Multiple Image Display** control allows up to eight images that can be displayed for the customer to designate on the image where the damage occurred or what needs maintenance.

The static images are in a directory called /controls/common/standard\_images. If you are going to use this control, then you will also need the **Image Detail** control that will allow the user to document the damage.

The important fields here are the **Image Description** and the **Image File** as these fields contain the title the user will see and the URL of where the file or image is respectively.

You can double-click the Image File field to select the image.

**Use Attached Images** allows the user to attach a picture which will then be used as an image, if this is set to Y.

# Image Detail

✓ Image Detail . Q	0 1						
Attribute Format	Value						
Title Character							
	Description of this control. Defaults to "Image Details". If you want to show the key in this title enter "{U}" in your title where you want the key value to be placed. The key value being accident number or unit number depending on which foundation the control is used in.						
Image Details (Loaded	0 records)						
	Description						

The **Image Detail** control is where the description of the damage will reside. If you want to change the title of the details or need help text, you can do so here.

### **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 nine breaks available. The designer can add text as a heading by using the Text or HTLML field.

### Go Button Instance (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.

### **Cancel Button**

The **Cancel Button** control allows for the user to select the button and not save whatever changes were just made. It is like the **Undo All Changes** icon except that the designer will need to designate what frame the user is taken to after they select the **Cancel** button.

### **Hyperlinks**

The **Hyperlinks** 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** checkbox selected will be opened in a separate window. In other cases, the current window will be replaced.

### Note Instances (1-6)

The **Note** control allows the creation of an additional note area. The number of row and columns can be controlled by using the arrange mode of screen designer and adjusting the size of the note area.

### **Run Report Instances (1-3)**

The **Run Report** control allows the user to run an M5 report by selecting a button, icon or link.

### **Static Message Viewer (1-4)**

The **Static Message Viewer** control provides a read-only view of a message entered during screen design.

### Item Instances (1-12)

The **Item** control allows the addition of a user item to a frame as a new field. It can be formatted as **Text**, **CheckBox**, or **Drop Down**. A specific list of values can be entered for a dropdown or, if left blank and the item is a validated item, they will automatically be loaded from the validation table.

### **Multiple Work Order Items Instances (1-4)**

The **Multiple Work Order Items** control allows any number of user-defined items to be displayed in a vertical table or list like format. The **Drop Down** checkbox will cause the values to be loaded as dropdown instead of a normal input field with an LOV. This only takes affect if the item is a validated item that has a list of defined values.

### **Multiple Unit Items**

The **Multiple Unit Items** control allows any number of user-defined items to be displayed in a vertical table or list like format. The **Drop Down** checkbox will cause the values to be loaded as dropdown instead of a normal input field with an LOV. This only takes affect if the item is a validated item that has a list of defined values.

### **Multiple Department Items**

The **Multiple Department Items** control allows any number of user-defined items to be displayed in a vertical table or list like format. The **Dropdown** check box will cause the values to be loaded as dropdown instead of a normal input field with an LOV. This only takes affect if the item is a validated item that has a list of defined values.

### **Multiple Component Items**

The **Multiple Component Items** control allows any number of user-defined items to be displayed in a vertical table or list like format. The **Drop Down** checkbox will cause the values to be loaded as dropdown instead of a normal input field with an LOV. This only takes affect if the item is a validated item that has a list of defined values.

# 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 REFRE	ESH DELETE FIND	ATTACH	LATED V			
Screen Designer						
General Information						
Screen Name: NEW WORK ORDER MAIN	Description: NEW WO MAIN					
Allow User Customization:	Foundation: Work Order	¥				
Assemble Organize						
Comune the components of this come						
Sequence the components of this screen.  Theme: The screen layout will depend only on the size of the components and the alignment options. Only components in the "Key and Title" None  and "Content" areas below will be part of the screen. Color Scheme: Classic M5						
Control Positions:						
Key and Screen T Key Block	Title					
Unused Content Work Ord Multiple	Jer Information Work Order Items (Instance 1)	nused				

#### Theme

The **Theme** is used to determine how the controls are presented on the frame. From the dropdown list you can select:

- None All selected controls 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.

#### None

The **None** theme frame layout depends 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 the components of this	screen			
Theme: The screen layo None  V and "Content" a	out will depend only on the size of the components and the alignment options. Only components in the "Key and Title" ireas below will be part of the screen.			
Color Scheme:				
Control Positions:				
	Key and Title			
	Key Block			
	↓ v			
Unused 🕂	Content Unused			
	Multiple Work Order Items (Instance 1)			
	Cost Summary			
	Mise Links			
	Work Request Plan List			

#### Pane

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

Assemble Organize					
- Sequence the components of this screen					
Theme: The screen will have three vertical panes all visible at the s	ame time. Each pane takes only a portion of the visible screen.				
Color Scheme:					
Classic M5 🗸					
Control Positions:					
Key and Title					
Screen Title	<b>†</b>				
Key Block	+				
· ·					
Left Pane 😝 Main Pane	_→ Right Pane				
Work Order Information					
Contact Information					
Cost Summary Meter Information	★ ↓				
Misc Links					
Visit Information Work Request Plan List					

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 provides screen tip information. Or use the right and left directional arrows to move the controls from one pane to another. This is 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.

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

#### Tab

The **Tab** theme 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 Tab v tab is determine	have up to eight tabs that will be as wide as the so of by the positioning of the components in the are	creen. Each tab can be viewed indi as below. The title of the tab can h	vidually. The contents of each be entered in the input field			
Color Scheme:						
Classic M5 🗸						
Control Positions:						
	Key and Title					
	Screen Title 🔺 🍵					
	~					
		<b>→</b>	→		→	〕→
Visit Information	Work Order Information	Meter Information	Contact Information			↓ ←* ▲ ^
	Cost Summary				÷ I I	÷
•	Work Request Plan List				•	*

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

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.

	Assemble	Organize											
1													
	Sequence	e the component	s of this s	screen.									
	Thoma	. The so	reen will h	ave up to eight vertical tabs th	at will collapse s	o only one at a time is vis	ible. The c	ontents of each tab is					
	Accordion a determined by the positioning of the components in the areas below. The title of the accordion can be entered in the input field												
	above each of the areas.												
	Color S	Scheme:											
	Classic												
	Contr	ol Position	s:										
				Key and Title									
				Screen Title	1								
				Ney Diock	•	,							
				-									
		6 H	- →			•	←		」←	_			, ←
	Visit In	formation 🔺	<b></b>	Work Order Information Multiple Work Order Items (In	istance 1) 🔶 🕇	Meter Information	<b>+</b>	Contact Information	+		1		1
			-	Cost Summary	(*		- +		+		+		+
			-	Misc Links	→	•	-		→		⇒		+
				Work Request Plan List			•		1				ł

#### **Color Scheme**

The Color Scheme options are Classic M5 and Portal.

- Classic M5 Displays a faint border around each control.
- **Portal** The portal design does not display a 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 screen such as the Key Block control. It is normally the key information for the frame. Hyperlinks is another example, so they are visible no matter what tab is displayed.

## 4. Preview Mode

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

arimonnauon			
en Name: WORK ORDER MAIN	Description:		
/ User Customization:	Foundation: Work Order	¥	
creen Previe	W	Arrange	
Creen Previe	<b>W</b> ar Filter	o Anange	

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 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**

SAVE UNDO REFRESH DELETE F	IND	
Frame Maintenance		
Report and Frame Information URL: //PRESENTATION/SCREENDESIGNER/PROCESS.ASPX?INF0=NEW WORK ORDER	RMAIN	
Type: Au Frame V N	dit:	
Prohibited On Menu: Dis	abled:	
Description: NEW WO MAIN		
Help URL:		
Authorized With URL:		
Component Name: mfiveUCWorkOrder.dll		
Sticky Fields:		
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 in *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 Maintenance					
Filter	×				
	Authorization Group	Security Level Read / Update / Full	Security Template	Reauthenticate on save	
i					

# Updates

Release	Section	Description
23.2	All sections	Applied miscellaneous writing style updates throughout the document.
24.1	Visit Information	Added new image with Work Order Signature as an Attribute.