



# Motor Pool - Screen Designer

User Guide

Version 25.x

Last Modified 25.0 | February 2025



AssetWorks Inc. reserves the right to make technical changes or modify this document without prior notice and disclaims responsibility whatsoever for potential errors or lack of information.

AssetWorks Inc. reserves all rights in this document, the subject matter, illustrations, and methodologies which are confidential, proprietary, and/or protected by applicable U.S. and international patents, copyrights, trademark, and trade secret laws. Any reproduction, disclosure to third parties, or utilization of its contents, in whole or in parts, is forbidden without prior written consent of AssetWorks Inc. Third-party products referred to by their trade name (if any) are trademarks of their respective companies and used only for illustrative purposes without endorsement.

© Copyright 2025 AssetWorks Inc. and/or its affiliates. All rights reserved. Specifications subject to change without notice.

## Contents

<b>Section 1. Overview .....</b>	<b>5</b>
<b>Section 2. Technical Support .....</b>	<b>6</b>
<b>Section 3. Screen Designer – Motor Pool .....</b>	<b>7</b>
Assemble Tab .....	7
Overview of Controls .....	7
Adding Controls .....	8
Adding Help Text to a Control .....	11
Adding Fields to a Frame .....	12
Adding the Version Number .....	14
<b>Section 4. Screen Designer Foundation Controls .....</b>	<b>15</b>
Overview .....	15
Controls .....	16
Screen Title .....	16
Employee Requestor Detail .....	16
Current Reservations .....	17
Cancel Reservation .....	17
Pickup/Return Dates and Location .....	18
Rental Class Availability .....	18
Rental Class .....	19
Available Units .....	19
Create New Reservation .....	19
Additional Information .....	20
Notes .....	20
Confirmation .....	21
Print Ticket .....	21
Run Report (Instances 1-3) .....	21
Spacer (Instances 1-4) .....	21
MP View Calendar .....	22
MP Reservation Info .....	22
Break (Instances 1-9) .....	22
Image .....	22
Reservation Item 1-6 .....	23
Multiple Reservations Item .....	23
Employee Item 1-3 .....	23
Multiple Employee Items .....	23
Message Viewer (Instances 1-4) .....	23
Static Message Viewer 1-4 .....	24
Button Controls .....	24
Contact Us .....	24

Hyperlinks .....	24
<b>Section 5. Organize Tab.....</b>	<b>25</b>
Theme .....	25
Color Scheme .....	25
Control Arrangement.....	26
<b>Section 6. Preview Mode .....</b>	<b>30</b>
<b>Section 7. Published Screen Changes Considerations .....</b>	<b>31</b>
M5 Security.....	31
Frame Maintenance.....	31
Menu Maintenance .....	31
<b>Section 8. Updates .....</b>	<b>32</b>

## Section 1. Overview

The M5 Screen Designer accomplishes these goals:

- 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.
- 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.
- 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.

## Section 2. Technical Support

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

Customer Care is available 7AM – 7PM EST Monday through Friday.

**Telephone:** 800.900.8152

**Email:** [M5Support@AssetWorks.com](mailto:M5Support@AssetWorks.com)

**Website:** [Community.AssetWorks.com](http://Community.AssetWorks.com)

You can use this website to open issues, review the status of past submitted issues, review and download documentation, review additional training materials, and access the latest AssetWorks news. For secure access to the website, contact Customer Care by calling the listed telephone number.

## Section 3. Screen Designer – Motor Pool

**SAVE** **UNDO** **REFRESH** **DELETE** **FIND** **ATTACH** **RELATED** ▾

### Screen Designer

**General Information**

Screen Name:  Description:

Allow User Customization:  Foundation:

**Assemble** **Organize**

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

**Screen Summary**

Search

<input checked="" type="checkbox"/> <b>Screen Title</b>	<input checked="" type="checkbox"/> <b>Key Block</b>	<input type="checkbox"/> Employee Requester Detail
<input type="checkbox"/> Current Reservations	<input type="checkbox"/> Cancel Reservation	<input type="checkbox"/> Pickup Date
<input type="checkbox"/> Return Date	<input type="checkbox"/> Pickup Location	<input type="checkbox"/> Return Location
<input type="checkbox"/> Rental Class Availability	<input type="checkbox"/> Rental Class	<input type="checkbox"/> Available Units
<input type="checkbox"/> Create New Reservation	<input type="checkbox"/> Additional Information	<input type="checkbox"/> Notes
<input type="checkbox"/> Confirmation	<input type="checkbox"/> Print Ticket	<input type="checkbox"/> Run Report (Instance 1)
<input type="checkbox"/> Run Report (Instance 2)	<input type="checkbox"/> Run Report (Instance 3)	<input type="checkbox"/> Spacer (Instance 1)

## 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

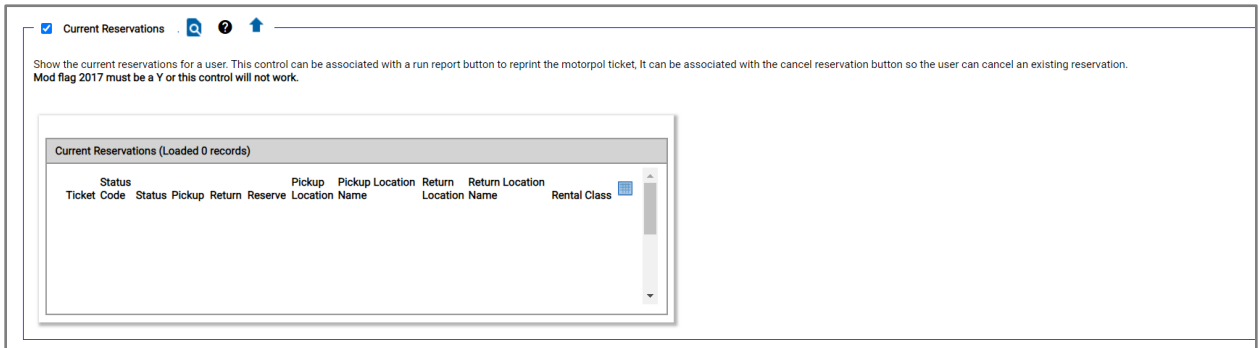
1. To create a custom Work Order Main frame, enter a Screen Name and Description and select Work Order from the foundation dropdown. After save, make sure you are on the Assemble tab of the frame.

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. The main area is divided into two tabs: 'Assemble' (selected and highlighted with a red box) and 'Organize'. The 'General Information' section is visible, containing fields for 'Screen Name' (MP EXAMPLE), 'Description' (Motor Pool Screen Designer Example), 'Allow User Customization' (No), and 'Foundation' (Motor Pool Reservation, highlighted with a red box). Below the tabs, there is a 'Mode' section with three radio buttons: 'Fabrication' (selected), 'Preview (shortcut key = ALT-R)', and 'Arrange'. The 'Screen Summary' section is also visible, featuring a search bar and a list of controls with checkboxes. The controls listed are: Screen Title (checked), Key Block (checked), Employee Requester Detail, Current Reservations, Cancel Reservation, Pickup Date, Return Date, Pickup Location, Return Location, Rental Class Availability, Rental Class, Available Units, Create New Reservation, Additional Information, Notes, Confirmation, Print Ticket, Run Report (Instance 1), Run Report (Instance 2), Run Report (Instance 3), and Spacer (Instance 1).

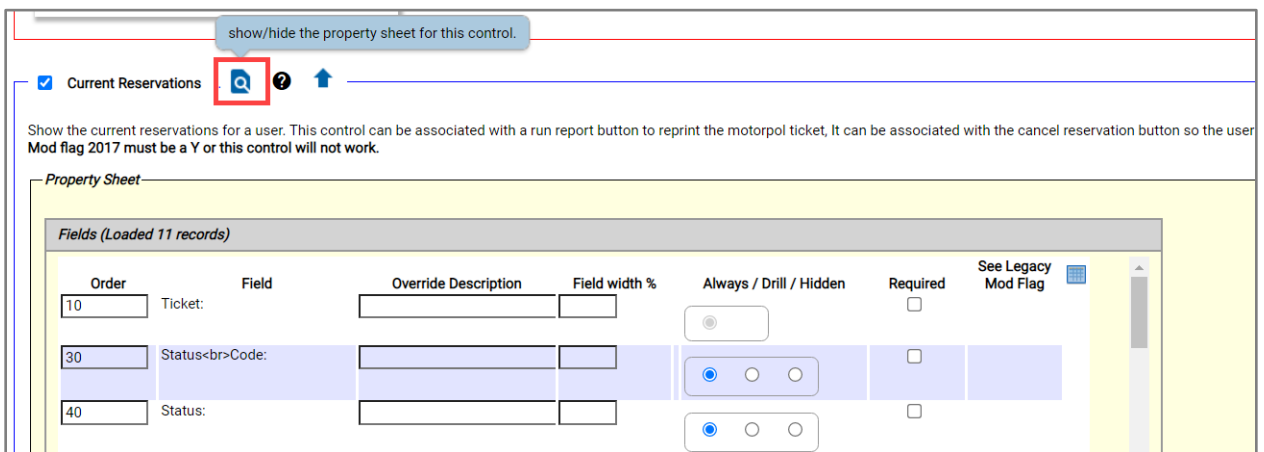
2. There are two modes with radio buttons: Fabrication and Preview. Select the radio button for Fabrication when adding Controls to the frame. Select the Preview radio button to review the custom frame that was designed.
3. There are two sections for the Fabrication radio button:
  - I. Screen Summary Section
  - II. Preview Control Section
4. In the 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.
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.
6. 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.



- After the checkbox is selected, the square will turn blue.



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



- 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/changed to the frame being developed.

SAVE

UNDO

REFRESH

DELETE

FIND

ATTACH

RELATED ▾

Screen Title

Q


?

↑

Property Sheet

Attribute	Format	Value
Version	Character	<input type="text"/> <p>Optional version number to be shown at the top of the screen.</p>
Screen background color	Character	<input type="text"/> <p>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</p>
Screen background image URL	Character	<input type="text"/> <p>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</p>
Repeat background image	Character	<input type="text"/> <p>Y or N. Should the background image repeat.</p>
Image position left/right %	Integer	<input type="text"/> <p>Used to position a non-repeating background image. 0=Left 100=Right</p>
Image position top/bottom %	Integer	<input type="text"/> <p>Used to position a non-repeating background image. 0=Top 100=Bottom</p>

## Adding Help Text to a Control

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

[illegible]

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

## 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:

1. Individual – Finite number per frame set by the Foundation.
2. Multiple – One Control and repeating rows for as many items are needed.

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 as shown below:

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 choosing to go directly to the “Preview Control” section.

When a **Multiple Items Instance** is first selected, select the property sheet icon. By selecting Multiple Items, the user can pick and choose what 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.

An example is shown below. 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. Always Required makes the field required entry on the new frame. Dropdown is used to view a list of values by selecting the down arrow as shown below. If the item has a list of values and dropdown is not selected, then the user will be able to double-click in the field to search the LoV.

☒ Multiple Employee Items

This control allows any number of user defined items to be displayed in a vertical table or list like format. The "Drop Down" check box will cause the the values to be loaded validated item that has a list of defined values.

**Property Sheet**

Read Only:  
No

**Items (Loaded 0 records)**

Order	Description	Item Name	Always Required	Mixed Case	Drop Down
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## 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.

The screenshot shows the 'Property Sheet' for the 'Screen Title' control. The sheet is divided into three columns: 'Attribute', 'Format', and 'Value'. The 'Version' attribute is highlighted with a red box. Below the 'Version' attribute, there is a text input field and a description: 'Optional version number to be shown at the top of the screen.' Other attributes visible include 'Screen background color', 'Screen background image URL', 'Repeat background image', 'Image position left/right %', and 'Image position top/bottom %'.

Attribute	Format	Value
Version	Character	<input type="text"/> <i>Optional version number to be shown at the top of the screen.</i>
Screen background color	Character	<input type="text"/> <i>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</i>
Screen background image URL	Character	<input type="text"/> <i>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</i>
Repeat background image	Character	<input type="text"/> <i>Y or N. Should the background image repeat.</i>
Image position left/right %	Integer	<input type="text"/> <i>Used to position a non-repeating background image. 0=Left 100=Right</i>
Image position top/bottom %	Integer	<input type="text"/> <i>Used to position a non-repeating background image. 0=Top 100=Bottom</i>

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.

## Section 4. Screen Designer Foundation Controls

### Overview

The Motor Pool Reservation Screen Designer functionality gives organizations the ability to design custom Motor Pool Reservation frames. This functionality can also be used as a component of setting up a Motor Pool Portal to permit external users (referred to as “outside” users) to view, create, cancel, and print motor pool tickets.

The screenshot displays the 'Screen Designer' application interface. 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 title 'Screen Designer' is prominently displayed. The main area is divided into two sections. The top section, titled 'General Information', contains fields for 'Screen Name' (SCREEN DESIGNER SAMPLE), 'Description' (Screen Designer Sample), 'Allow User Customization' (set to No), and 'Foundation' (Motor Pool Reservation). Below this, there are tabs for 'Assemble' and 'Organize'. The 'Organize' tab is active, showing a 'Mode' selector with three options: 'Fabrication' (selected), 'Preview (shortcut key = ALT-R)', and 'Arrange'. Below the mode selector is a 'Screen Summary' section with a search bar and a list of checkboxes for various screen components. The list includes: Screen Title, Key Block, Employee Requester Detail, Current Reservations, Cancel Reservation, Pickup Date, Return Date, Pickup Location, Return Location, Rental Class Availability, Rental Class, Available Units, Create New Reservation, Additional Information, Notes, Confirmation, Print Ticket, Run Report (Instance 1), Run Report (Instance 2), Run Report (Instance 3), and Spacer (Instance 1).

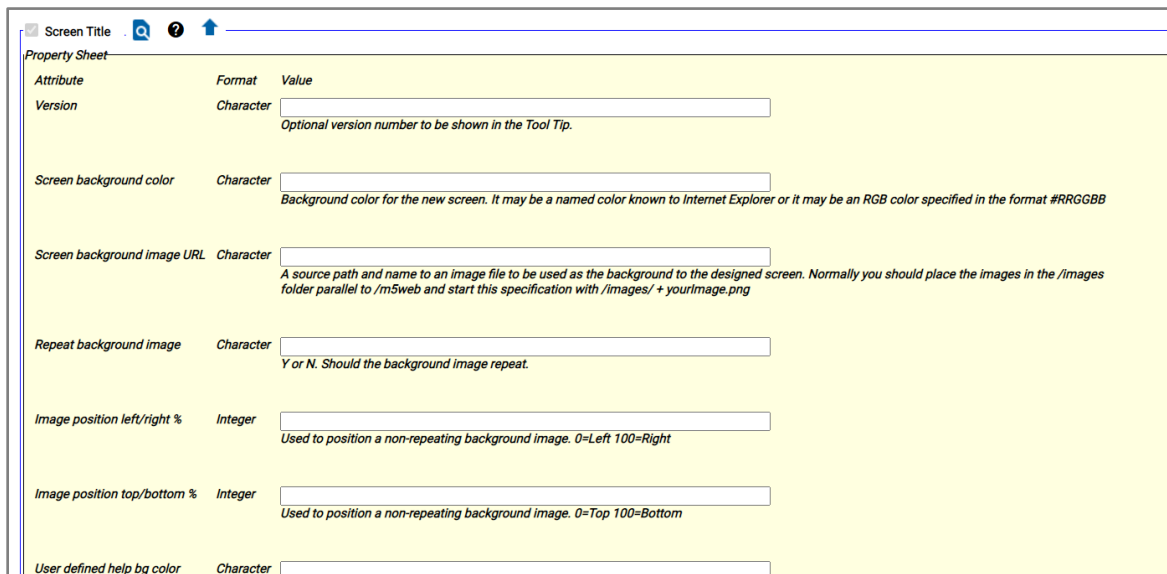
The Motor Pool functionality must be configured in M5. M5 Motor Pool System flags that are configured for Motor Pool functionality apply to the Motor Pool Portal. In addition, the Motor Pool Notifications can be used with this functionality. However, the calendar feature only works with Outlook.

The screen designer foundation for this functionality is the Motor Pool Reservation. The Motor Pool Reservation foundation can be used to create one or more pages that are “linked” together to allow the user to check on his reservations, cancel reservations, and create reservations. The foundation has multiple user controls and these user controls may have property sheets to be used to configure the Motor Pool Portal frames.

In order for an outside user to use the Motor Pool Portal, a custom Portal Logon needs to be designed. This process is described in a separate document. The Motor Pool Portal also permits messages to be displayed on the custom frames. How to create messages that will be used in the Motor Pool foundation user controls is described in a separate document as well.

## Controls

### Screen Title



The screenshot shows the 'Screen Title' control's property sheet. It has a title bar with a checkbox, a search icon, a help icon, and an up arrow. The main area is a table with columns 'Attribute', 'Format', and 'Value'. The attributes include 'Version', 'Screen background color', 'Screen background image URL', 'Repeat background image', 'Image position left/right %', 'Image position top/bottom %', and 'User defined help bg color'. Each attribute has a corresponding input field and a description.

Attribute	Format	Value
Version	Character	<input type="text"/> <i>Optional version number to be shown in the Tool Tip.</i>
Screen background color	Character	<input type="text"/> <i>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</i>
Screen background image URL	Character	<input type="text"/> <i>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</i>
Repeat background image	Character	<input type="text"/> <i>Y or N. Should the background image repeat.</i>
Image position left/right %	Integer	<input type="text"/> <i>Used to position a non-repeating background image. 0=Left 100=Right</i>
Image position top/bottom %	Integer	<input type="text"/> <i>Used to position a non-repeating background image. 0=Top 100=Bottom</i>
User defined help bg color	Character	<input type="text"/>

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, alignment of help text, etc.




### Employee Requestor Detail



The screenshot shows the 'Employee Requestor Detail' control. It has a title bar with a checked checkbox, a search icon, a help icon, and an up arrow. The main area contains a form titled 'Requester Detail' with the following fields: 'Reserved For:' (text input), 'Department:' (dropdown menu showing '# DEP'), 'Phone No.:' (text input), 'Ref No.:' (text input), and 'Requested By: On:' (text input).



## Current Reservations

☒ Current Reservations   

Show the current reservations for a user. This control can be associated with a run report button to reprint the motorpool ticket. It can be associated with the cancel reservation button so the user can cancel an existing reservation. **Mod flag 2017 must be a Y or this control will not work.**

Current Reservations (Loaded 0 records)


Status	Pickup	Return	Reserve	Pickup Location	Return Location	Rental Class
Ticket Code	Status	Pickup	Return	Location Name	Location Name	

This control can be associated with a run report button to reprint the motor pool ticket. It can be associated with the cancel reservation button so the user can cancel an existing reservation.



**Important:** System Flag 2017 must be set to Y or this control will not work.

## Cancel Reservation

☐ Cancel Reservation   

Cancel Reservation

Allows you to add a **Cancel Reservation** button to the frame.

## Pickup/Return Dates and Location

☒ Pickup Date . ? ↑

This control allows the user to specify the pickup date using a calendar. It cannot be used if the "Pickup/Return Information" control is used.

Pickup Date:

☒ Return Date . ? ↑

This control allows the user to specify the return date using a calendar. It cannot be used if the "Pickup/Return Information" control is used.

Return Date:

☒ Pickup Location . ? ↑

This control is a simple selection box that allows the user to select the pickup location. It cannot be used if the "Pickup/Return Information" control is used.

Pickup Location:

☐ Return Location . ? ↑

Controls for entering pickup and return dates and locations for motor pool reservations.

## Rental Class Availability

☒ Rental Class Availability . ? ↑ Group=Select Rental Class


**Rental Class Availability**

Please select a location.

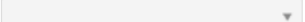
Please select a pickup date.

Please select a return date.

## Rental Class

☒ Rental Class . ?  Group=Select Rental Class

This control is a simple selection box that allows the user to select the rental class. It cannot be used if the "Class Availability" control is used.

**Rental Class:**  


Allows a user to select rental class from a dropdown menu.

## Available Units

☒ Available Units

This control allows the user to select what specific unit they want to rent. After all reservation detail has been entered this control will list all the units that are still available.

Available Units (Loaded 0 records)

Reserve Unit No	Year Mfg	Make	Model	Billing Code	License	Using Dept	Owning Dept	Meter Type	Meter Spec	Tech Spec	Tech Description	MCC
-----------------	----------	------	-------	--------------	---------	------------	-------------	------------	------------	-----------	------------------	-----

Allows a user to specify what unit they want to reserve.

## Create New Reservation

☒ Create New Reservation . ? ↑

This control is used in conjunction with the pickup/return and additional information controls. This control will create the reservation after the details have been entered. If the screen is not being run as a portal user "reserved for" details are also required. The "save" control cannot be used in place of this control.

Create new reservation

This control is used in conjunction with the pickup/return and additional information controls. This control will create the reservation after the details have been entered. The details that are required are class, pickup date, return date, pickup location and return location. If the frame is not being run as a portal user "reserved for" details are also required. The "save" control cannot be used in place of this control.

## Additional Information

The screenshot shows a control titled 'Additional Information' with a header bar containing a checkmark, the title, and three icons (a magnifying glass, a question mark, and an upward arrow). Below the header is a white box with a shadow containing the title 'Additional Information' and three text input fields labeled 'Destination:', 'Reason:', and 'Account No.:'. The entire control is enclosed in a blue border.

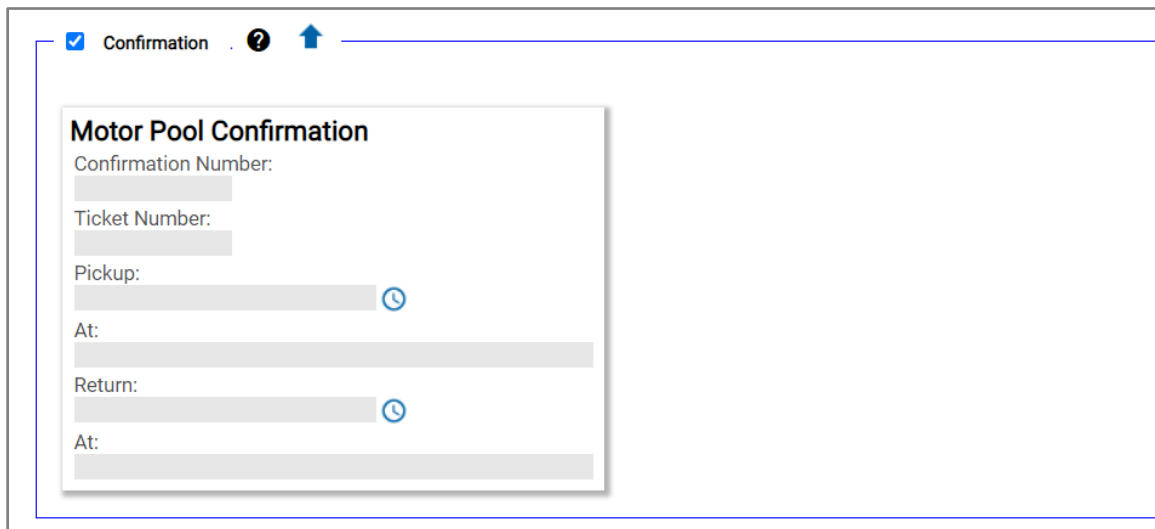
## Notes

The screenshot shows a control titled 'Notes' with a header bar containing a checkmark, the title, and three icons (a magnifying glass, a question mark, and an upward arrow). Below the header is a yellow box with a shadow containing a 'Property Sheet' table. The table has three columns: 'Attribute', 'Format', and 'Value'. It contains two rows: one for 'Columns' with a value of '2' and a description 'The number of columns that should appear in each row of the note area.', and one for 'Rows' with a value of '5' and a description 'The number of rows that should appear in the note area.'. Below the yellow box is a white box with a shadow containing the title 'Notes' and a large gray rectangular area for notes. The entire control is enclosed in a blue border.

Attribute	Format	Value
Columns	Character	2 <i>The number of columns that should appear in each row of the note area.</i>
Rows	Character	5 <i>The number of rows that should appear in the note area.</i>

Allows users to add notes to reservation tickets, can specify number of columns and rows for the area.

## Confirmation



The screenshot shows a confirmation dialog box titled "Motor Pool Confirmation" within a larger window. The dialog box contains the following fields and controls:

- A checked checkbox labeled "Confirmation" with a question mark icon and an upward arrow icon to its right.
- A text input field labeled "Confirmation Number:".
- A text input field labeled "Ticket Number:".
- A text input field labeled "Pickup:" with a clock icon to its right.
- A text input field labeled "At:".
- A text input field labeled "Return:" with a clock icon to its right.
- A text input field labeled "At:".

## Print Ticket

Allows user to print a motor pool ticket by selecting a print/email ticket button.

## Run Report (Instances 1-3)

Allows user to run an M5 report by selecting a button, icon, or link.

## Spacer (Instances 1-4)

This has the same features as the break control, but it does not force the next control to go to the left of the frame and you can control the width. 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.

Allows a user to view motor pool reservations in various statuses by using a calendar feature.

## MP Reservation Info

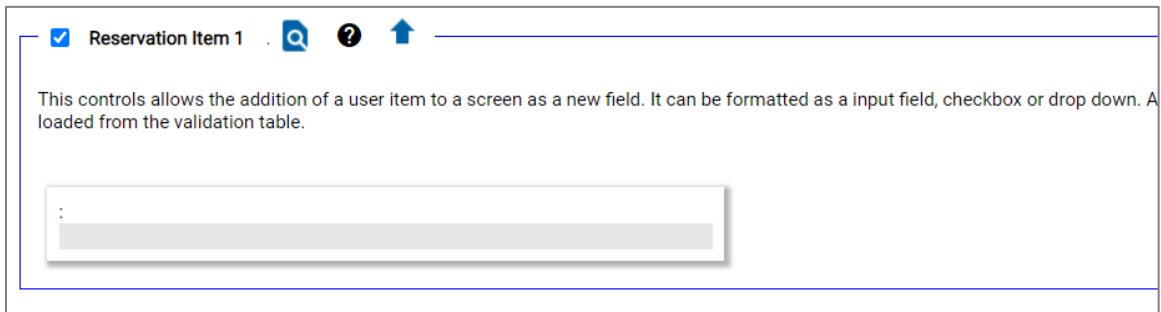
## Break (Instances 1-9)

Forces the next control to go all the way to the left of the frame. This control can also display static informational text. If no text or HTML are defined a horizontal line will be displayed using the specified background color.

## Image

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 frame by screen designer. The size of the image can be controlled by using the "arrange" mode of screen designer.

## Reservation Item 1-6

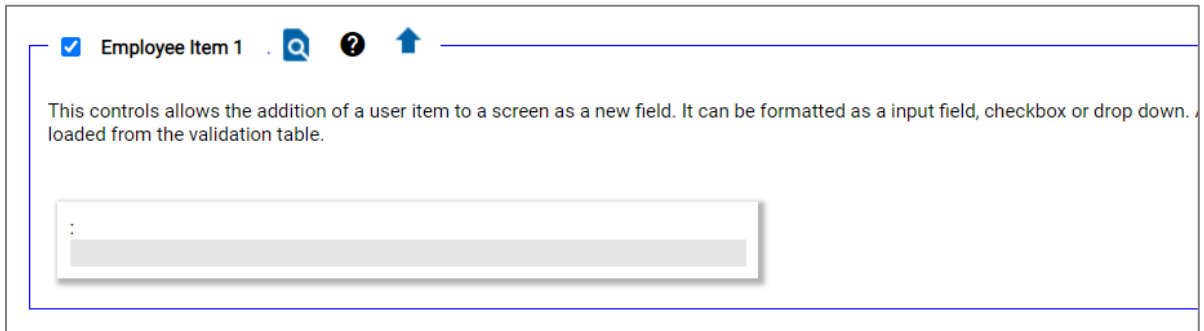


This controls allows the addition of a user item to a frame as a new field. It can be formatted as an input field, checkbox or dropdown. A specific list of values can be entered for a dropdown or, if left blank and the item is a validated item, they will automatically be loaded from the validation table.

## Multiple Reservations Item

This control allows any number of user defined items to be displayed in a vertical table or list like format. The Dropdown checkbox will cause the values to be loaded in a 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.

## Employee Item 1-3



## Multiple Employee Items

This 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 in a 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.

## Message Viewer (Instances 1-4)

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

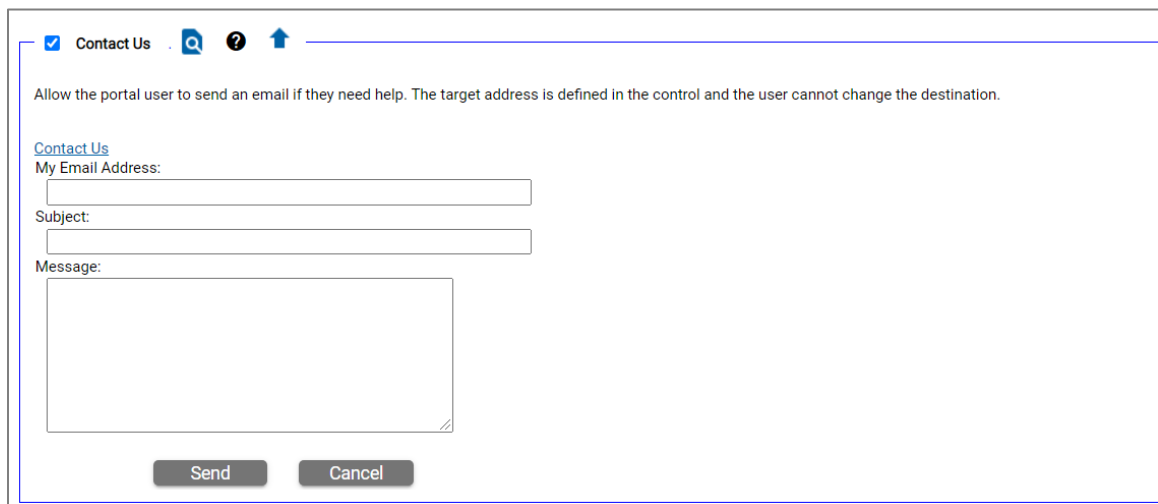
## Static Message Viewer 1-4

This control provides a read-only view of a message entered during screen design. This control does not require an additional frame to maintain the message.

## Button Controls

You have the option to add the following buttons: Save Button, Go Buttons (up to three, these allow navigation to another M5 frame), Logoff Button, Cancel Button.

## Contact Us



The screenshot shows a web form titled "Contact Us" with a blue header bar containing a checkmark icon, the title "Contact Us", and three small icons (a magnifying glass, a question mark, and an upward arrow). Below the header, a line of text reads: "Allow the portal user to send an email if they need help. The target address is defined in the control and the user cannot change the destination." The form contains three input fields: "My Email Address:" (a single-line text box), "Subject:" (a single-line text box), and "Message:" (a multi-line text area). At the bottom of the form are two buttons: "Send" and "Cancel".

Allows the portal user to send an email if they need help. The target address is defined in the control and the user cannot change the destination.

## Hyperlinks

Using this control a user can link to another mfive frame or any external link. All frames that begin with HTTP or have the "New Window" checked will be opened in a separate window. In other cases, the current window will be replaced.



## Section 5. 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.

### 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.

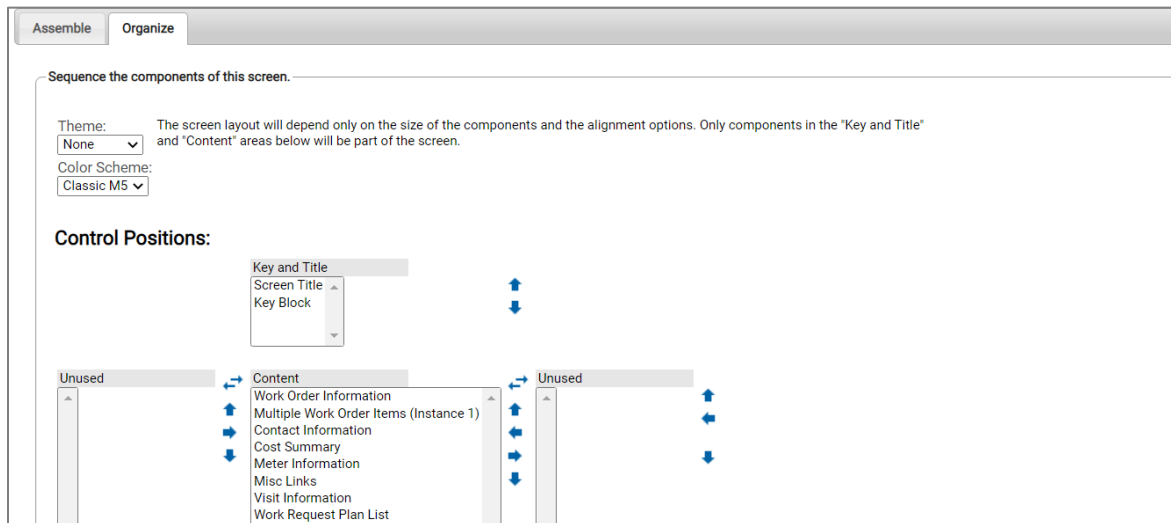
## Control Arrangement

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.

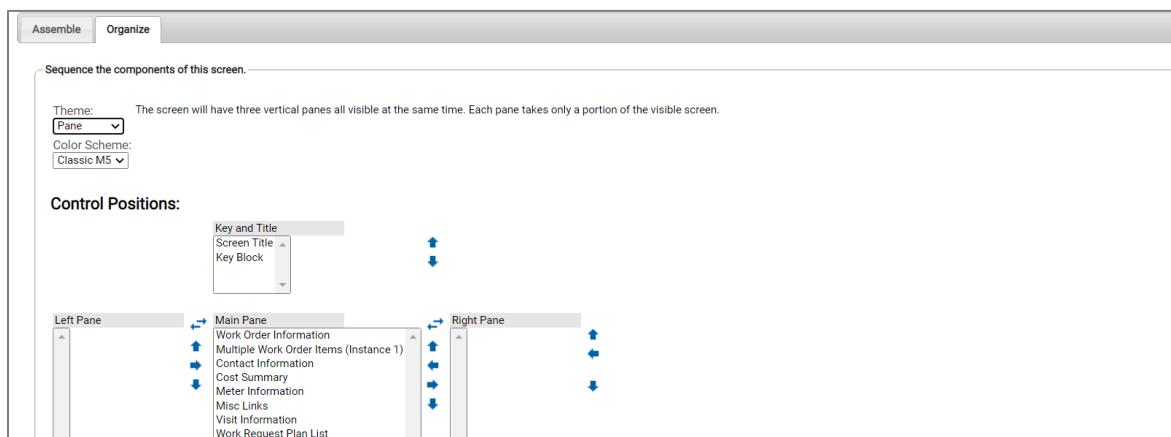
## None Theme

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.

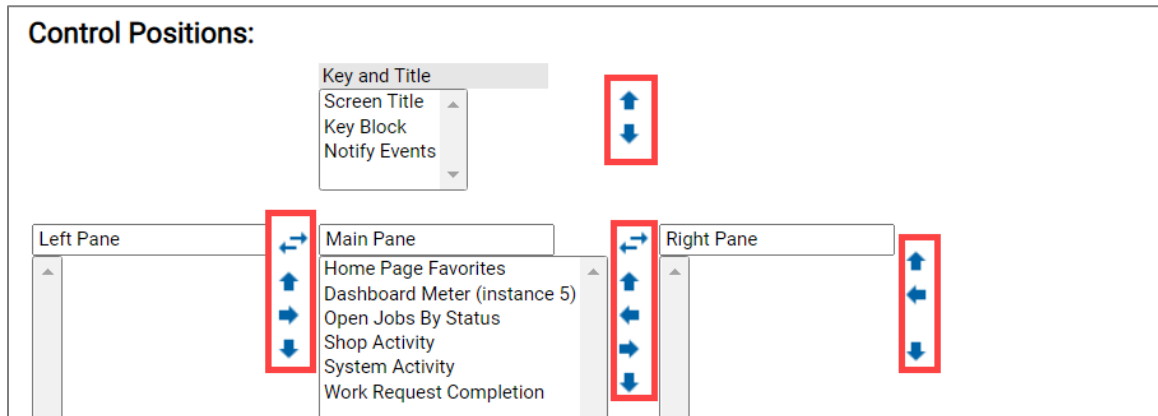


## Pane Theme

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 for 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 frame tip information.

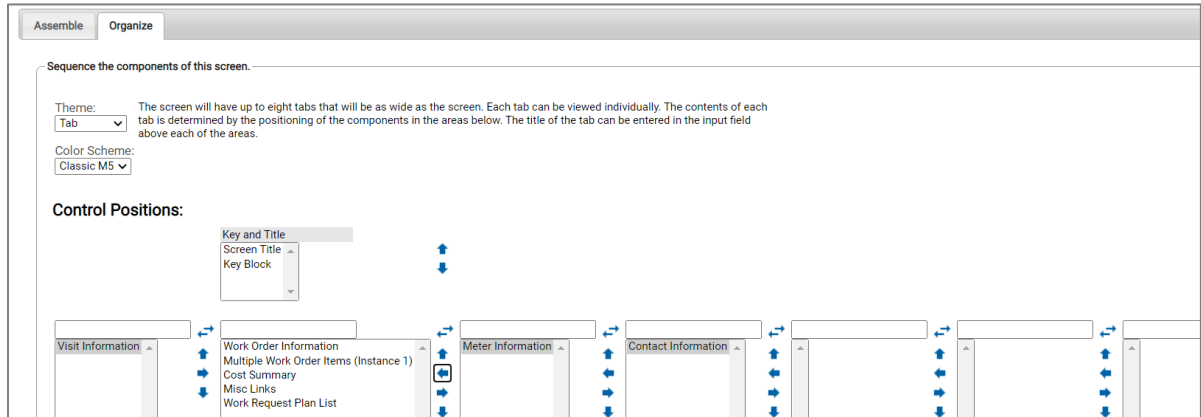


Or use the right and left directional arrows to move the Controls from one pane to another. This is also referred to as a Control Swapper.

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.

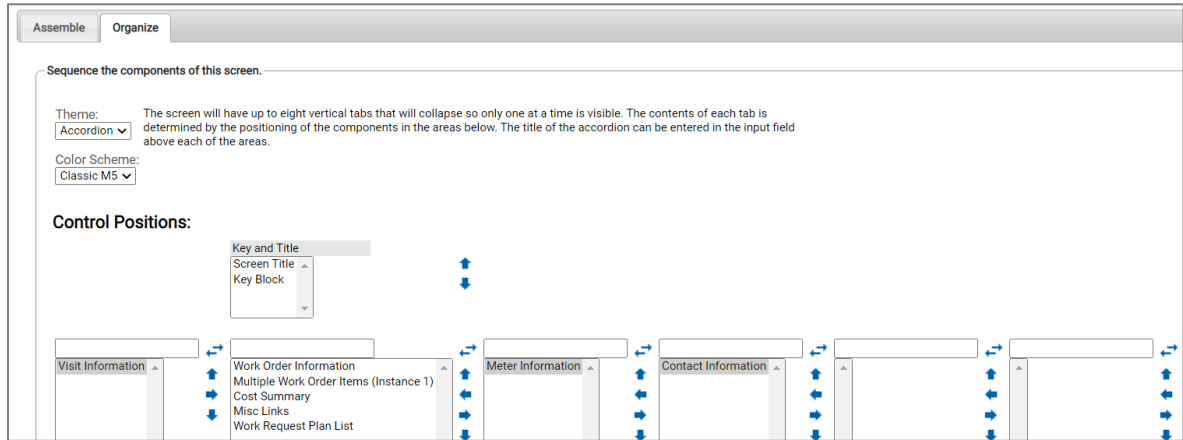


To add a title to the tab, enter the information in the blank space above each tabbed area. The title can contain up to 20 alphanumeric characters.

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.



## Section 6. 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.

The screenshot shows the 'Screen Designer' application. At the top, there is a toolbar with buttons: SAVE, UNDO, REFRESH, DELETE, FIND, ATTACH, and a RELATED dropdown. Below the toolbar is the 'Screen Designer' title. A 'General Information' panel contains fields for 'Screen Name' (MP EXAMPLE), 'Description' (Motor Pool Screen Designer Example), 'Allow User Customization' (No), and 'Foundation' (Motor Pool Reservation). Below this is a tabbed interface with 'Assemble' and 'Organize' tabs. The 'Organize' tab is active, showing a 'Mode' section with three radio buttons: 'Fabrication', 'Preview (shortcut key = ALT-R)' (which is selected), and 'Arrange'. Below the mode section is the 'Screen Preview' area. It contains an 'Additional Information' panel with fields for 'Destination', 'Reason', and 'Account No.'. To the right of this panel are two buttons: 'Cancel Reservation' and 'Create new reservation'. At the bottom of the preview area, there is a table header 'Current Reservations (Loaded 0 records)' and a 'Pickup Date' field.

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

## Section 7. 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 shows the 'Frame Maintenance' form. At the top are buttons: SAVE, UNDO, REFRESH, DELETE, and FIND. The form title is 'Frame Maintenance'. Below it is a section 'Report and Frame Information' containing the following fields:

- URL: /PRESENTATION/SCREENDESIGNER/PROCESS.ASPX?INFO=NEW WORK ORDER MAIN
- Type: Frame (dropdown)
- Audit: No (dropdown)
- Prohibited On Menu: No (dropdown)
- Disabled: No (dropdown)
- Description: NEW WO MAIN
- Help URL: (text field)
- Authorized With URL: (text field)
- Component Name: mfveUCWorkOrder.dll
- Sticky Fields: (text field)
- Dept. Access Function: (text field)
- Default Menu: (dropdown)
- Added In Version: (text field)

At the bottom of the form are two tabs: 'Menu List' 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 through Role Maintenance. Security templates can be applied to screen designer frames.

The screenshot shows the 'Menu Maintenance' form. At the top are buttons: SAVE, UNDO, REFRESH, DELETE, and FIND. The form title is 'Menu Maintenance'. Below it is a 'Filter...' search box. The main area displays a tree view of the menu structure. The 'ROOT' folder is expanded, showing three sub-items. Each sub-item has a column for 'Authorization Group' with a checkbox, and a column for 'Security Level' with a dropdown menu. The 'Security Template' and 'Reauthenticate on save' columns are also present but empty.

	Authorization Group	Security Level	Security Template	Reauthenticate on save
ROOT				
Sub-item 1	<input checked="" type="checkbox"/>	Read / Update / Full		
Sub-item 2	<input checked="" type="checkbox"/>	Read / Update / Full		
Sub-item 3	<input checked="" type="checkbox"/>	Read / Update / Full		

## Section 8. Updates

The following updates apply to the *Motor Pool Screen Designer User Guide*.

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