AssetWORKS

Screen Designer Homepage

Application Training

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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.

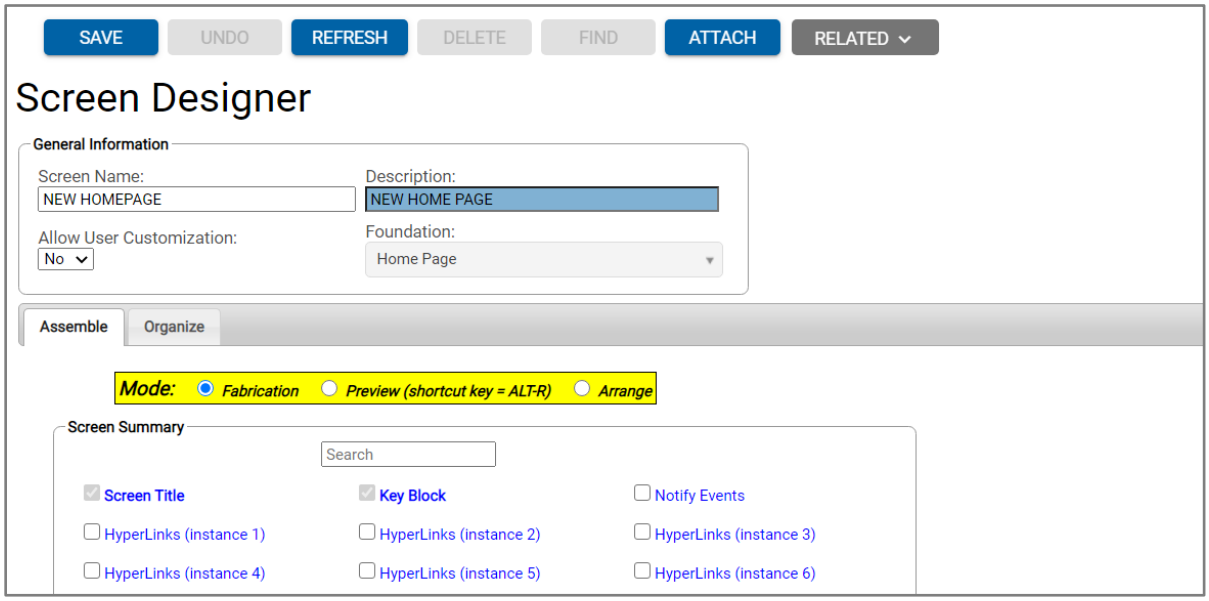
Telephone: 800.900.8152

Email: M5Support@AssetWorks.com

Website: 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 – Home Page



Assemble tab

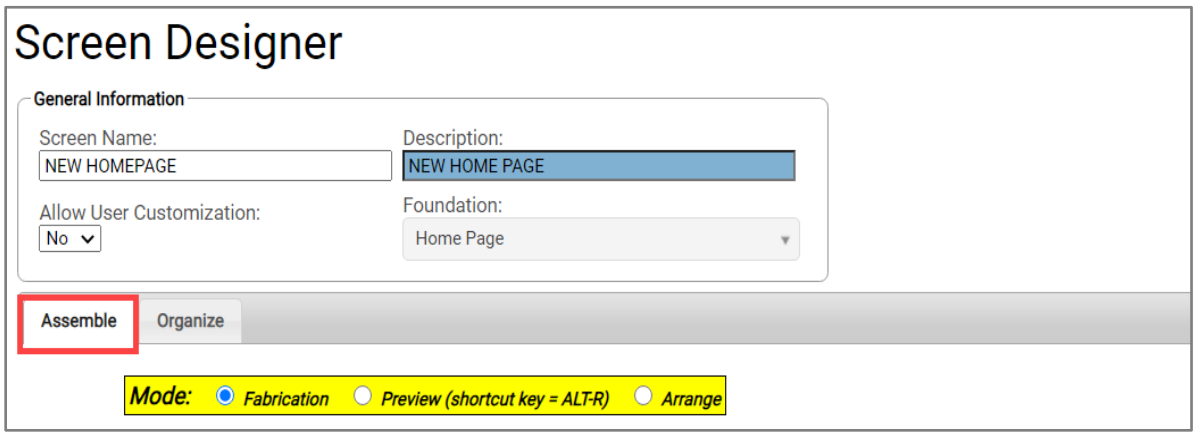
Overview of Controls

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.
- Deal only with their own fields. There are no direct references to another Control's fields.
- Can be made mandatory.
- Every frame built on the foundation will have this control. These are set by AssetWorks if the data must be present for the business logic to function.

Adding Controls

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

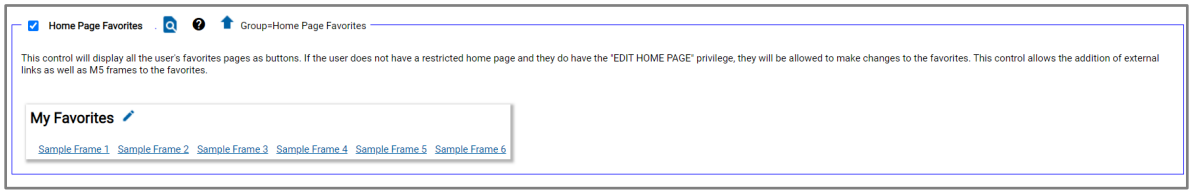


2. There are two modes with radio buttons: “Fabrication” and “Preview”. Select the radio button for “Fabrication” when adding Controls to the frame. Select the “Preview” radio button to review the custom frame that was designed.
3. There are two sections for the “Fabrication” radio button:
    i. Screen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

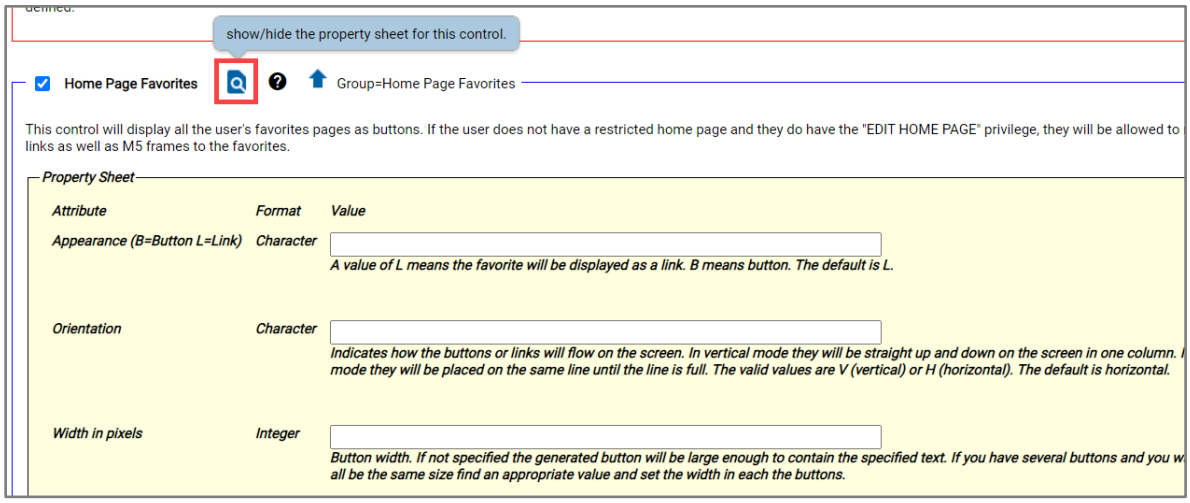
    Controls that are required on this frame are automatically checked. The Controls can be selected by selecting the checkbox in front of the specific Controls.

    ii. 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.
4. 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.
5. After the checkbox is selected, the square will turn blue.

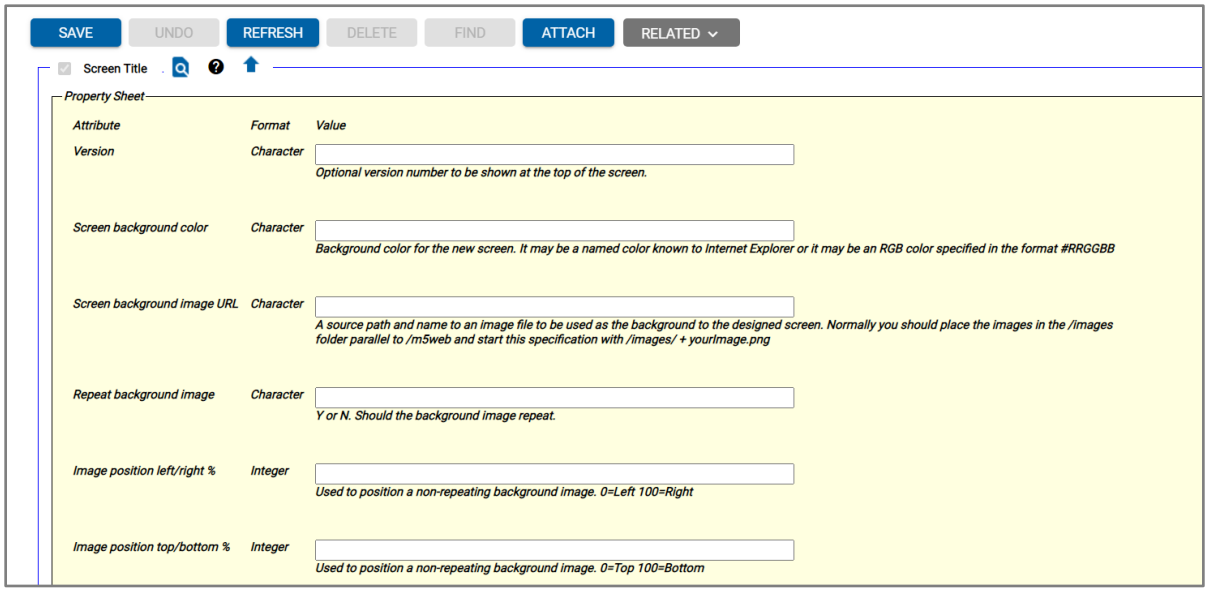


6. Next select the Property Sheet icon for the selected Controls.



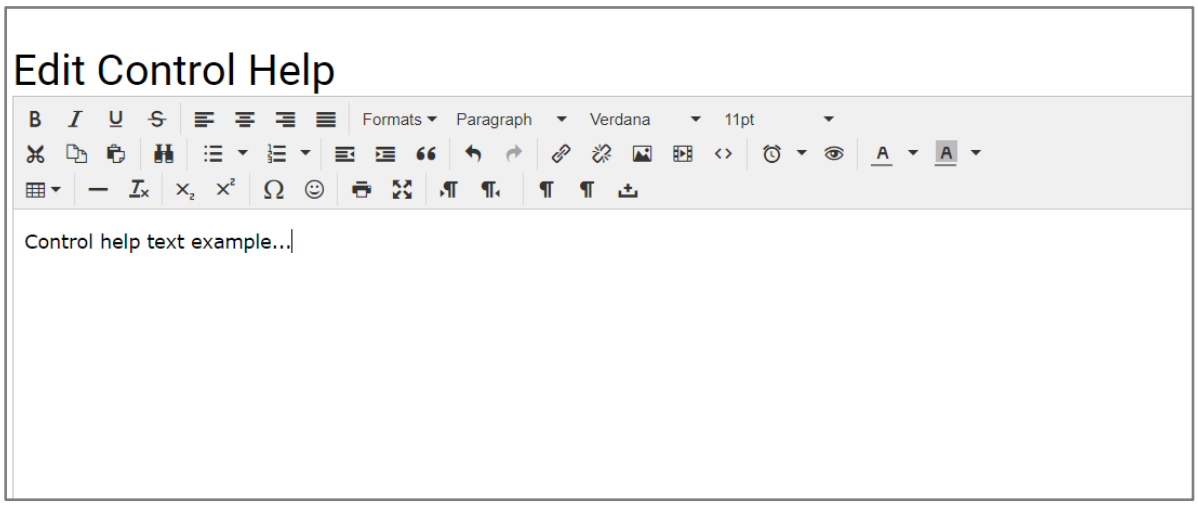
7. In the Preview Control section, if there is a Note Pad icon to the right of the Control name, there is a property sheet for the Control. Please note, not all Controls have Property Sheets and not all Property Sheets are the same for the Controls. To display the Control's property sheet and make changes, select the icon.

8. In the example below, color, text and images can be added/changed to the frame being developed.



Adding Help Text to a Control

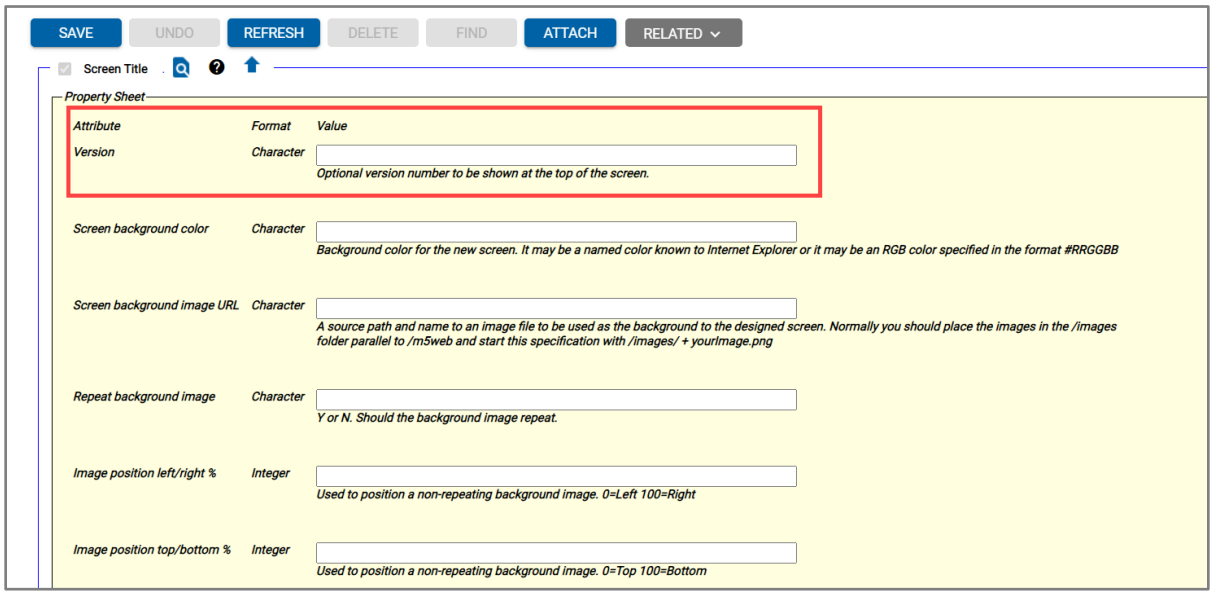
To add user-definable help text, select the icon. Straight text or html can be entered. Up to 444 characters can be entered.



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

Adding the Version Number

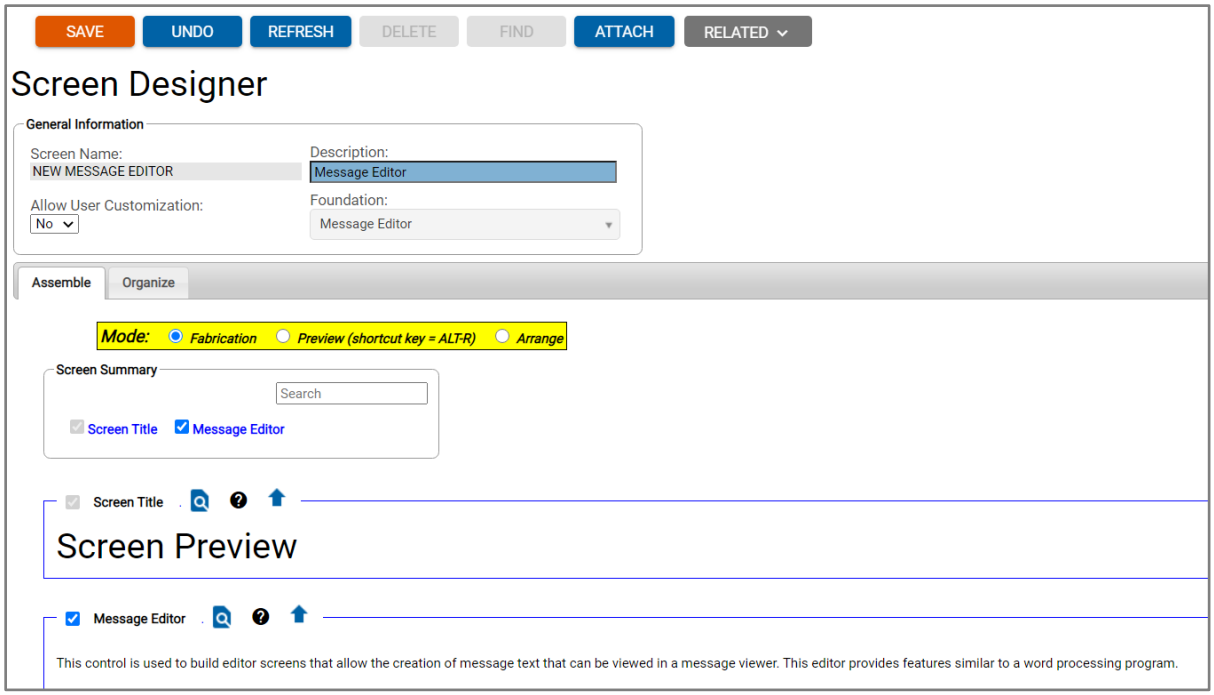
By entering the version number here, the new frame will have this version number next to the frame name. This is optional.



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

Message Editor Foundation

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

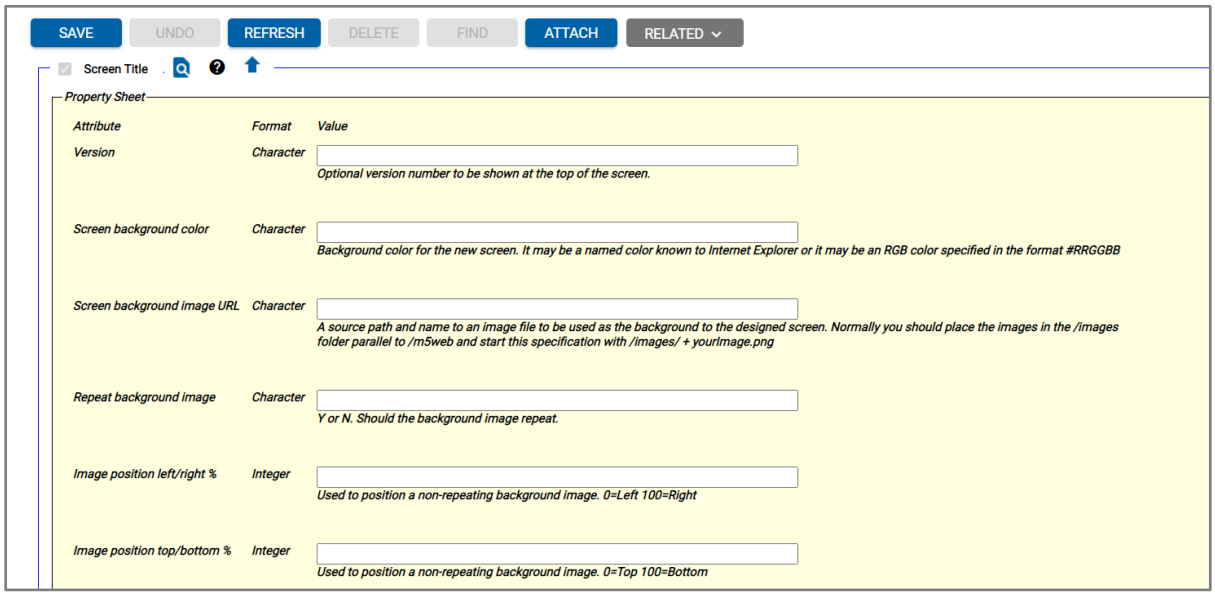


The property sheet for the message editor foundation contains an attribute called message key. This is the name for the corporate message page and is required. It is used to select the message when adding message controls to custom homepages. The message key name must be unique so when creating new message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

Section 4. Home Page Controls

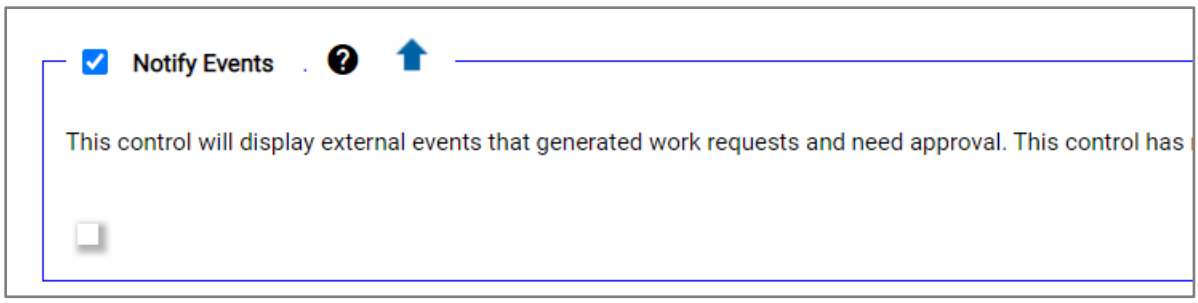
Screen Title

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



Notify Events

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



Hyperlinks (1-6)

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

Category Links

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

Break Instance (1-9)

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

Spacer (1-4)

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

Image (1-3)

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

Message Viewer (1-6)

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

Go Button (1-6)

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

Logoff Button

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

OPMs

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

Notes (1-2)

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

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

Calculator

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

Date Calculator

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

Length Converter

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

ICU Status

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

Dashboard Meter (1-6)

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

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

Dashboard Spark Line (1-6)

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

Home Page Favorites

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

Home Page Favorites (Wide)

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

User Notifications

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

My Reports and My Reports (Wide)

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

Latest Exchange Rate

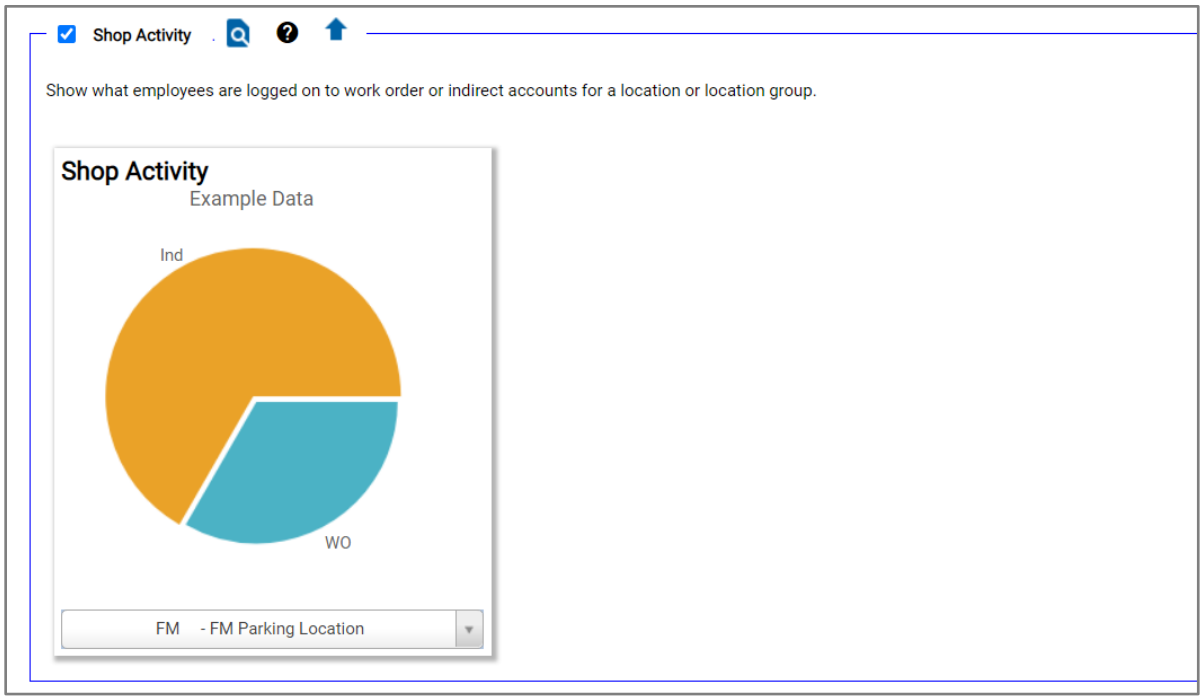
This control displays the latest exchange rates. This can only be used if you have installed and are using the multi-currency features of M5.

M5 Search

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

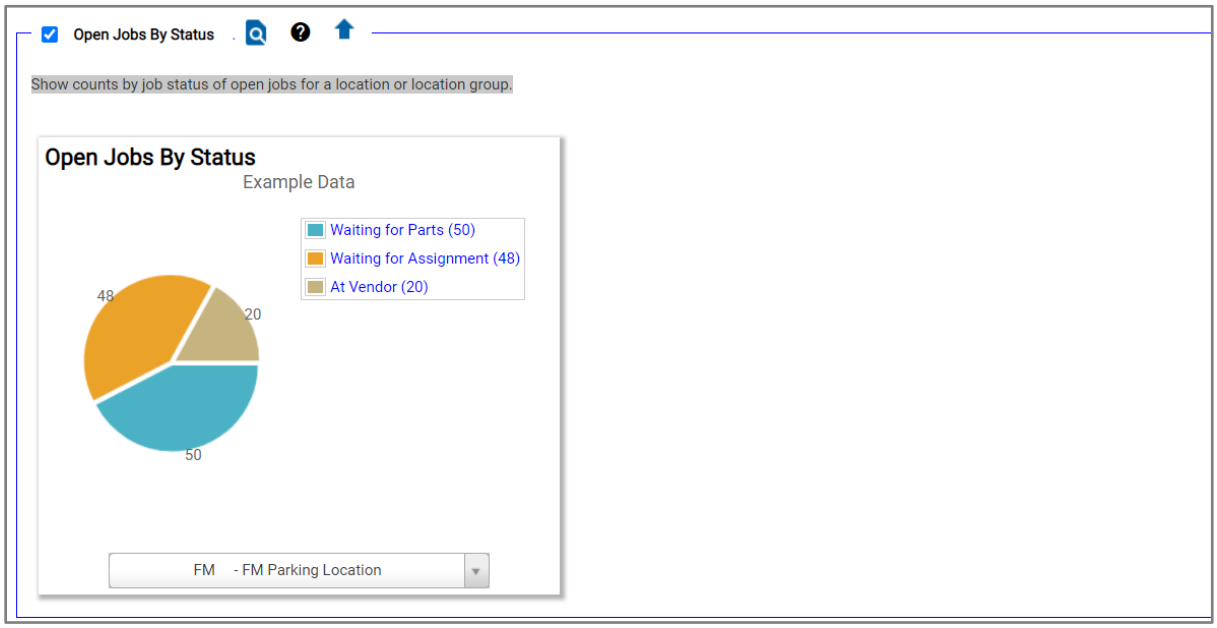
Shop Activity

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



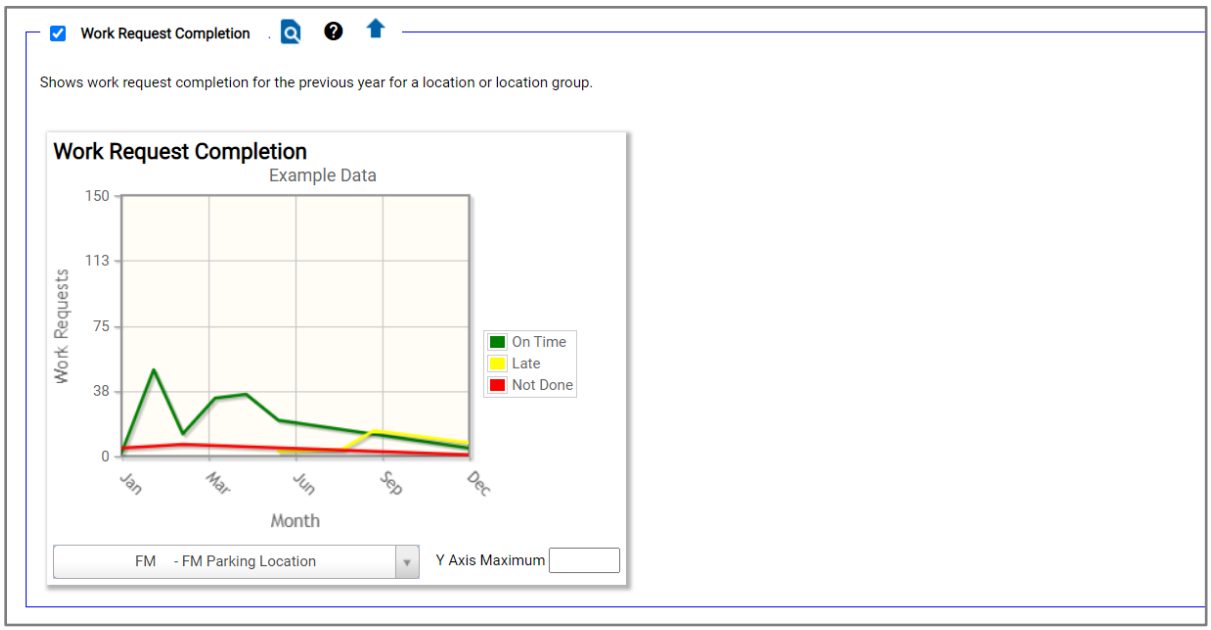
Open Jobs by Status

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



Work Request Completion

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

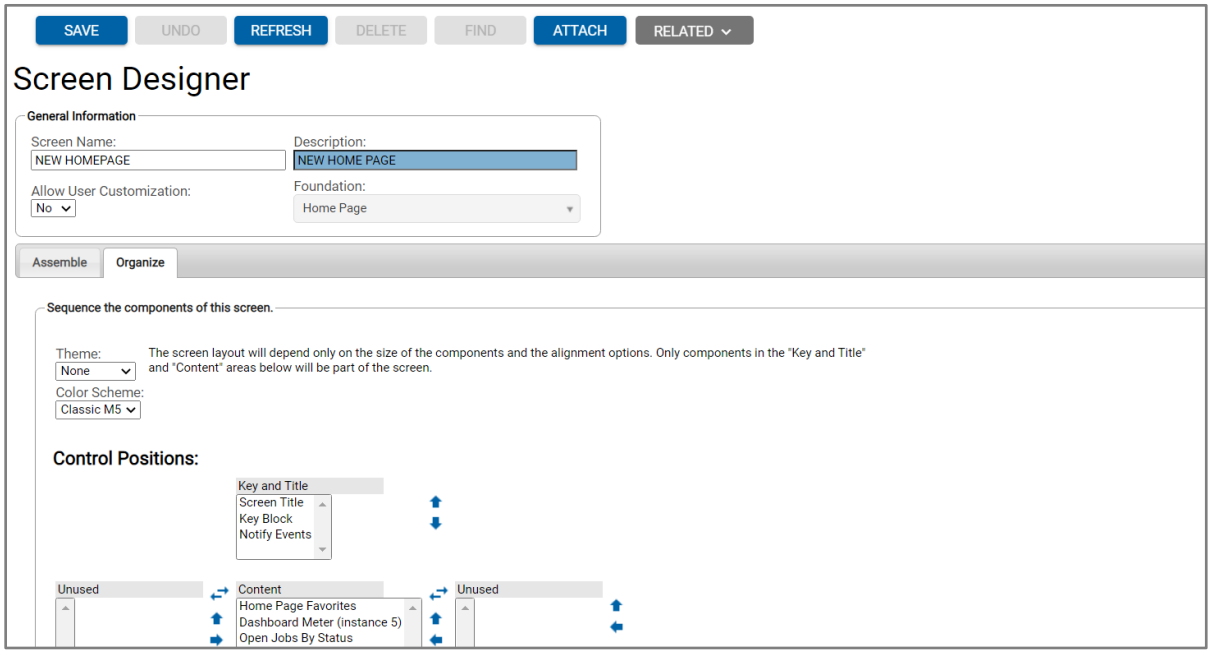


System Activity

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

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 dropdown options are:

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

Color Scheme

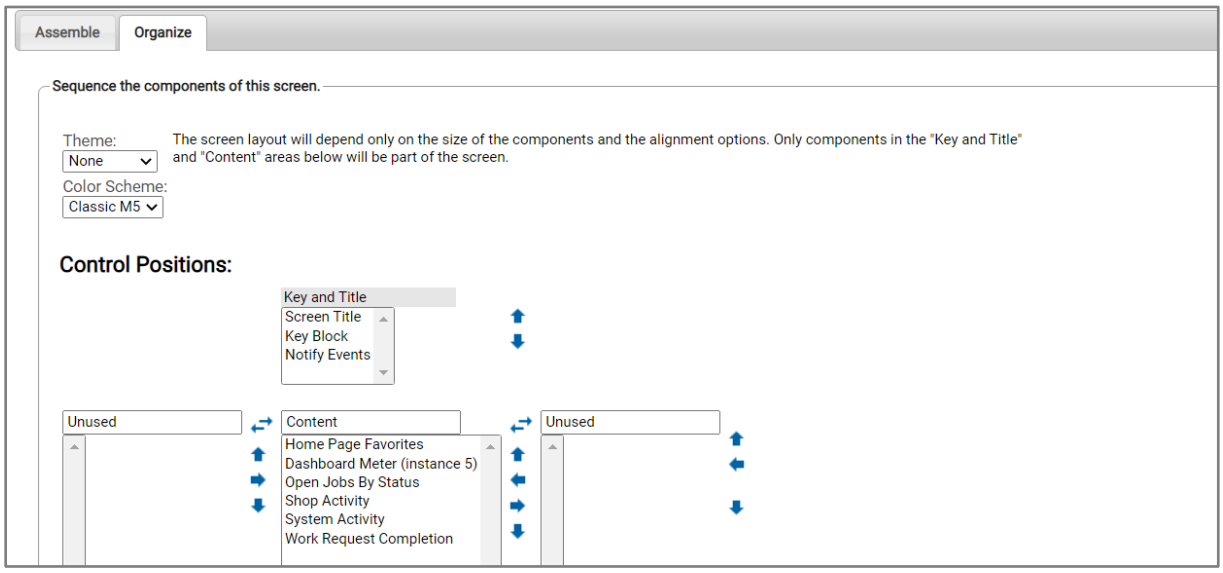
The color scheme choices are classic M5 and portal. Classic M5 shows a faint border around each control whereas the portal design has no border.

Control Arrangement

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

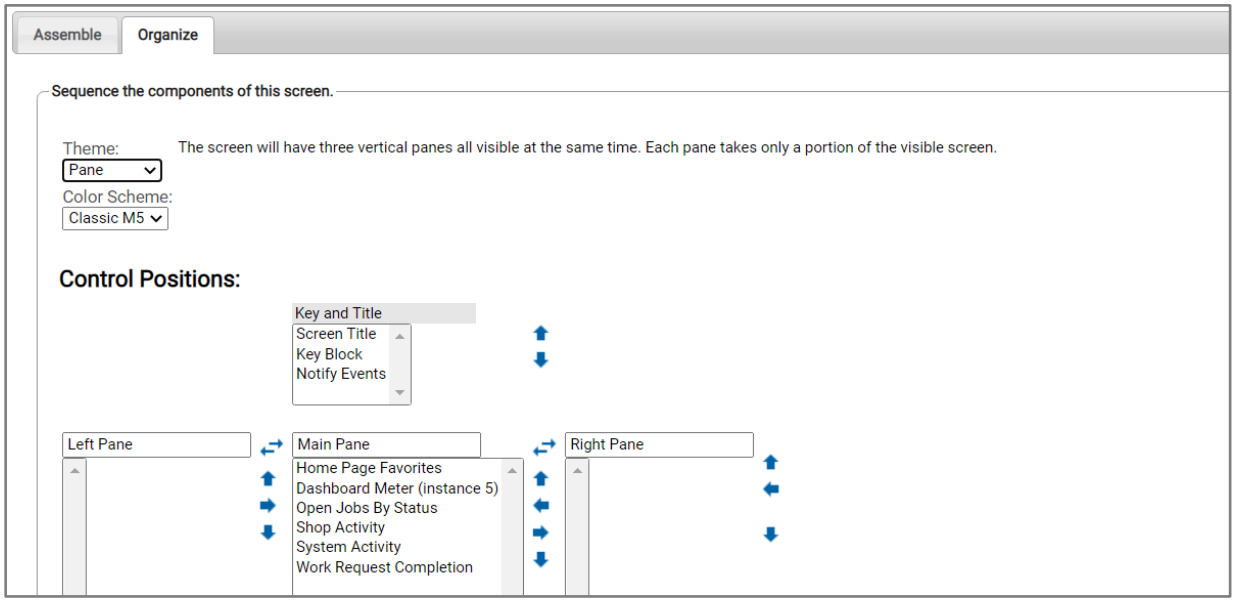
None Theme

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

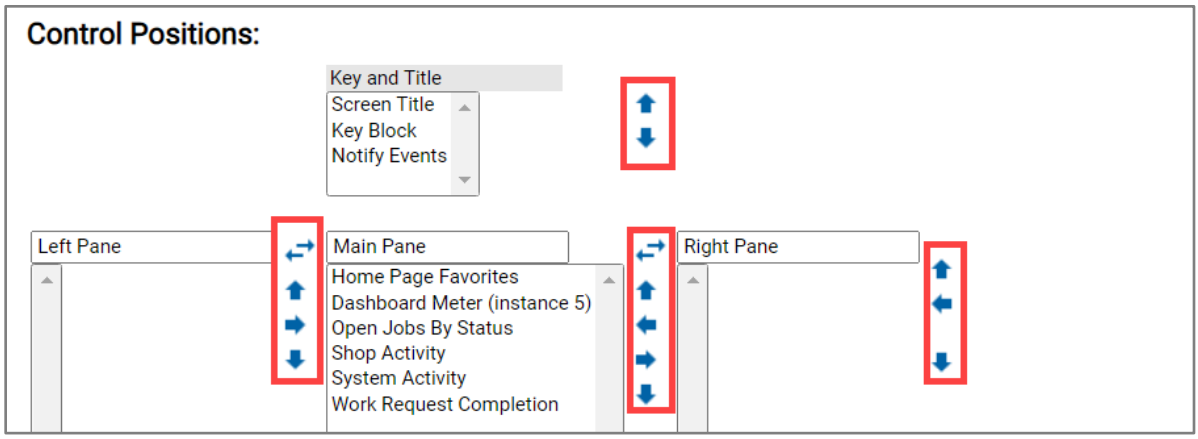


Pane Theme

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.

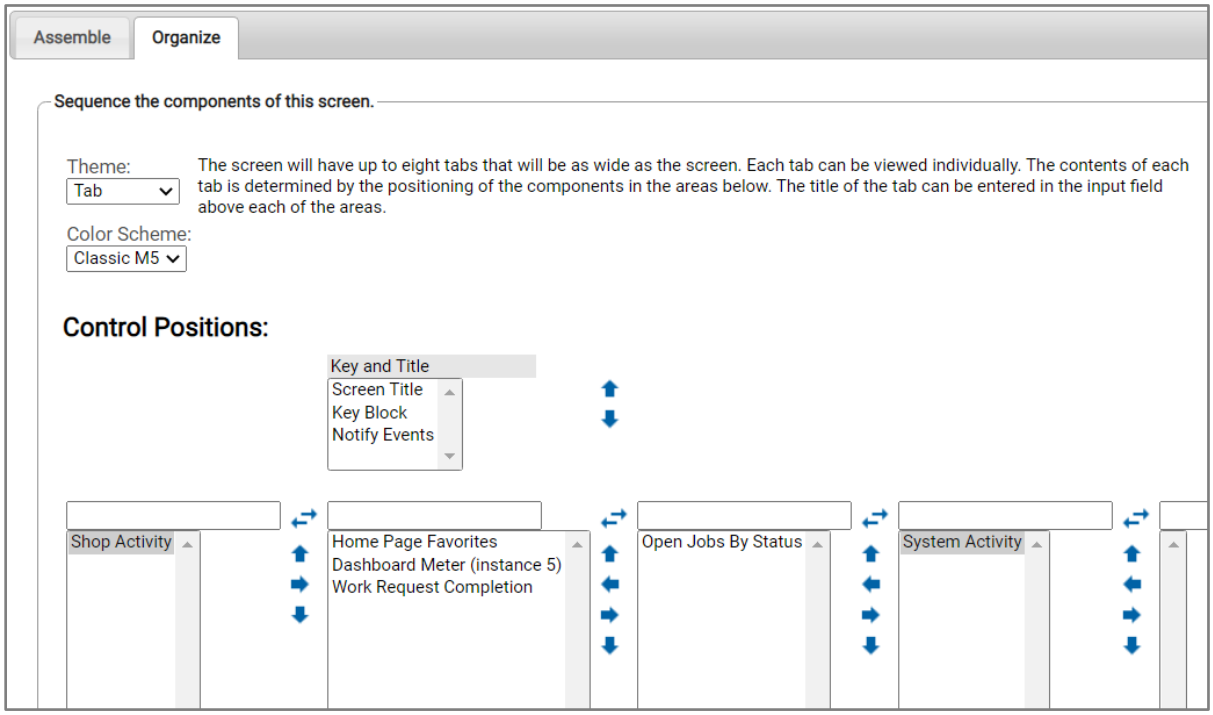


Or use the right and left directional arrows to move the Controls from one pane to another. This is also referred to as a Control Swapper.

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.

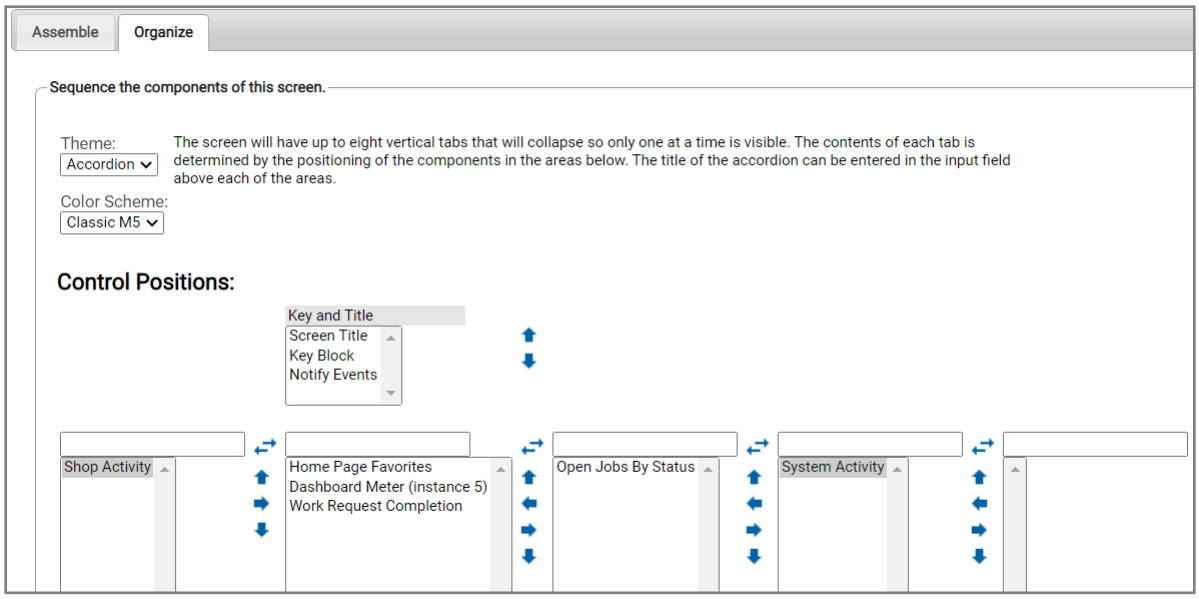


To add a title to the tab, enter the information in the blank space above each tabbed area. The title can contain up to 20 alphanumeric characters.

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.

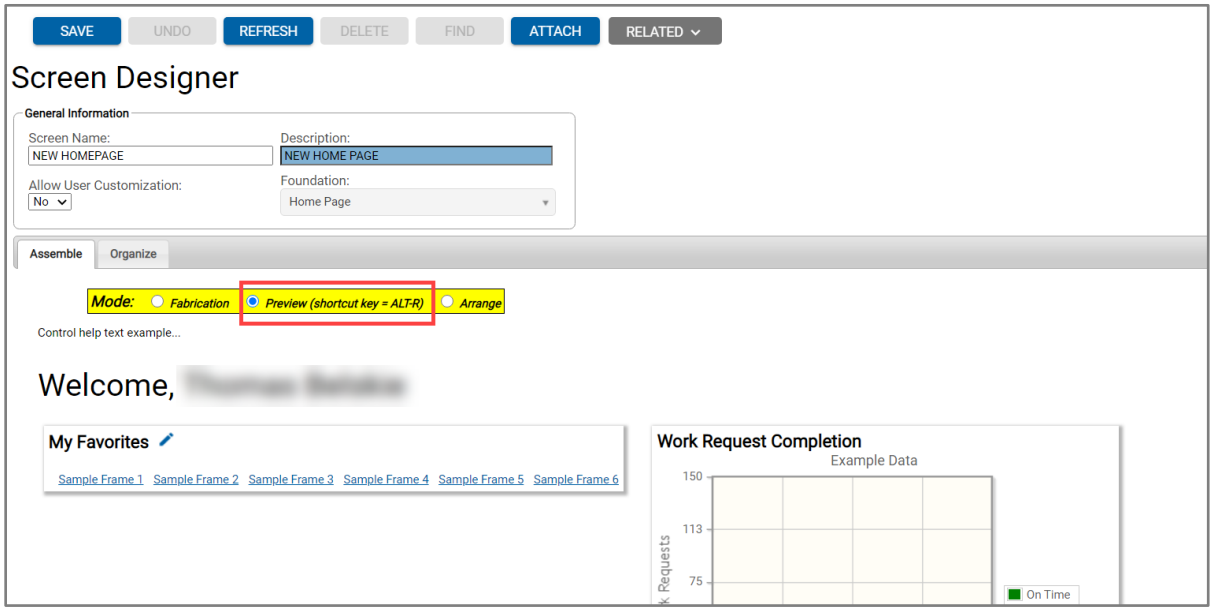
Accordion Theme

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.



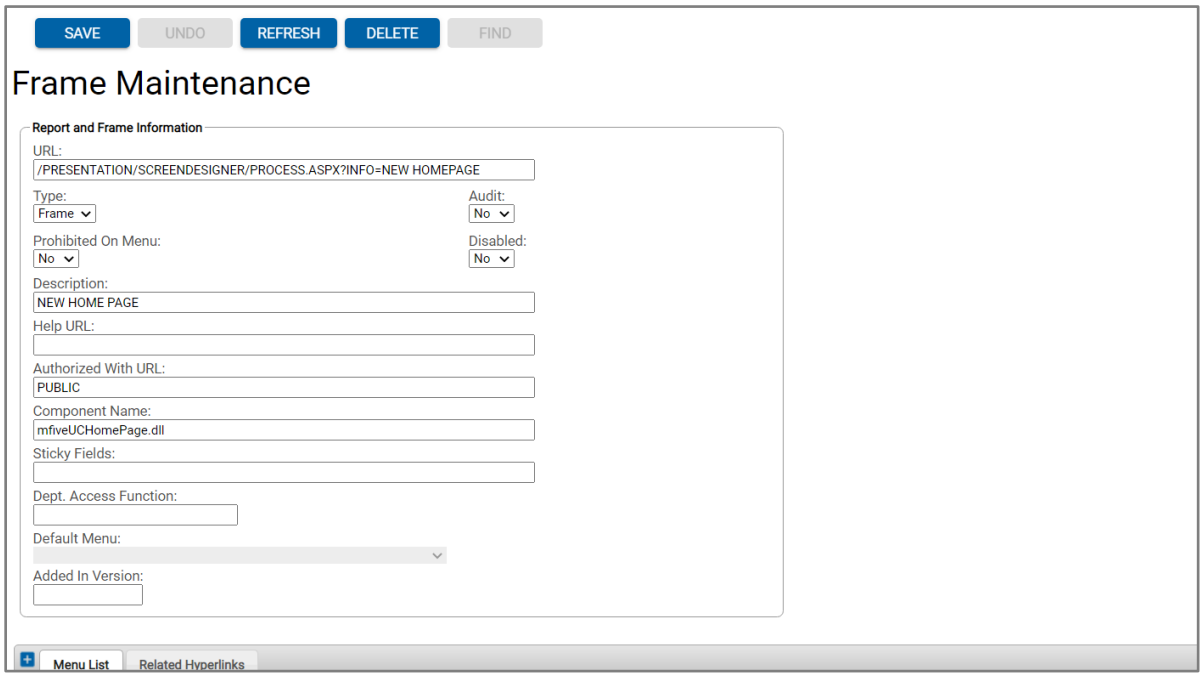
The final step is to select the SAVE icon to finalize your changes.

Section 7. Published Screen Changes Considerations

M5 Security

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

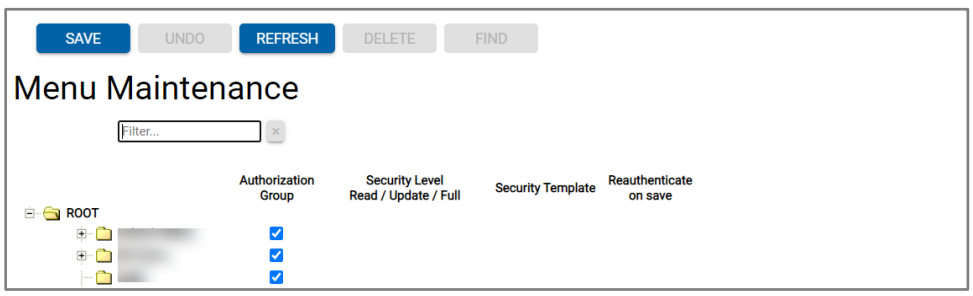
Frame Maintenance



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

Menu Maintenance

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



Section 8. Updates

The following updates apply to *Screen Designer Homepage Application Training*.

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.