



Screen Designer

Overview

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Section 1. Overview

Screen Designer allows you to develop and customize certain frames in M5 to fit your business needs. You can reorder, add, and remove fields.

It also provides an additional level of security beyond the Field Security Template functionality as the custom frames can show limited views of data and you can remove certain fields deemed sensitive.

For example, you may want to create two different Work Order Main frames: one with limited data for a certain group and one with access to more data for another group.

This module requires an additional license.

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. Available Screen Designer Foundations

Accident – Department
Accident – Unit
Booking Appointments
Comm Part Charges
Customer Unit View
Customer View Work Order Detail
Direct Invoice
Director
Employee
Home Page
Incident
Message Editor
Motor Pool Driver Profile
Motor Pool Reservation
Motor Pool Reservation Calendar
Portal Logon
Unit Attachment Query
Unit Maintenance
Unit Maintenance (no creation)
Work Order
Work Request Query

Section 4. Screen Designer Basics

SAVE

UNDO

REFRESH

DELETE

FIND

RELATED ▾

Screen Designer

General Information

Screen Name:

Description:

Allow User Customization:

No ▾

Foundation:

? ▾

Assemble

Organize

Creating a Screen

SAVE

UNDO

REFRESH

DELETE

FIND

ATTACH

MORE ▾

RELATED ▾

Screen Designer

General Information

Screen Name:

ACCIDENT (EXAMPLE)

Description:

Accident Example

Allow User Customization:

No ▾

Foundation:

Accident - Unit ▾

Assemble

Organize

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

Screen Summary

Search

☒ Screen Title

☒ Key Block

☐ Unit

☐ Insurance

☐ Driver

☐ Multiple parties

☐ Multiple registrations

☐ Trip

☐ Trip Question

☐ Accident Detail

☐ Condition

☐ Witness

☐ Police Information

☐ Claim

☐ Multi Claims

☐ Payments

☐ Work Order

☐ Vendor Estimate

☐ Work Requests

☐ Attachments

☐ Item (Instance 1)

☐ Item (Instance 2)

☐ Item (Instance 3)

☐ Item (Instance 4)

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



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

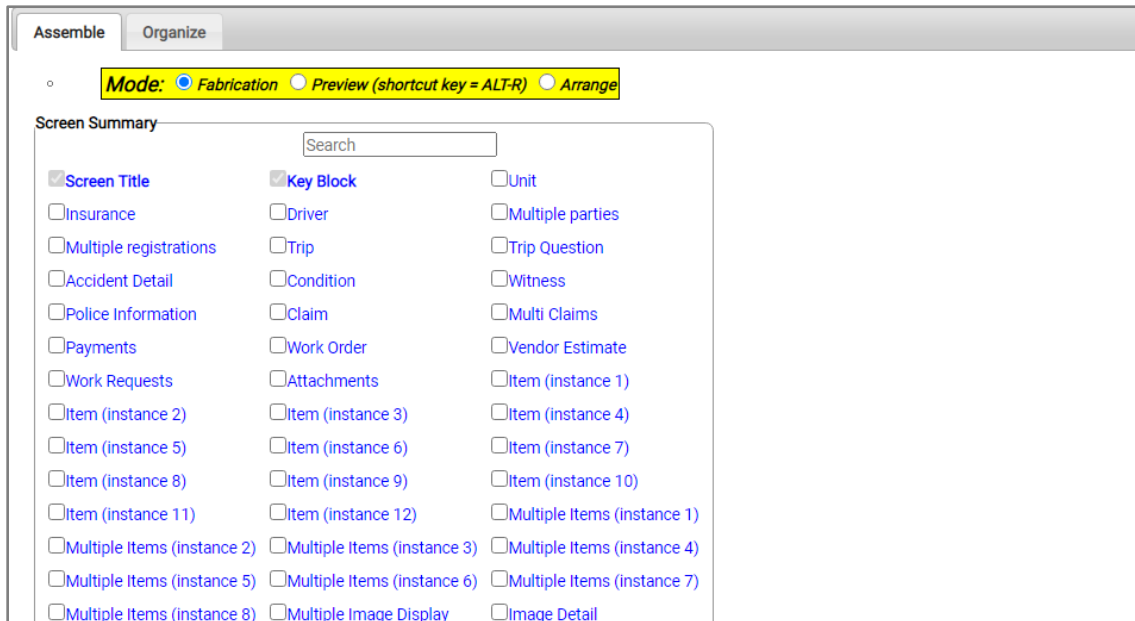
2. Enter a **Description**, limited to 60 alphanumeric characters.
3. **Allow User Customization** Y/N dropdown.
4. Select a **Foundation**. For example, Work Order Main. The foundational frame is the frame in M5 you want to customize using screen designer.



Note: Only select M5 frames are available in this module.

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

Navigating the Assemble Tab



Mode – Radio buttons:

- You begin in Fabrication mode by default. You will select and configure available controls using this mode.
- Preview allows you to see a sample of what your design will look like when implemented in M5.
- Arrange allows you to rearrange controls to further customize the frame layout and appearance by using drag and drop functionality.

Screen Summary – This section contains a list of all available controls for the selected foundation. You can select the checkbox next to a control to add it to your frame.

- Each foundation has a different set of controls. Any mandatory controls will already be selected.

Preview User Controls – You can view each control individually if you scroll past the Screen Summary section.

- You can also select a checkbox to add the control to the foundation.
- Included controls are outlined in blue. Excluded controls are outlined in red.

Control Options

The screenshot displays the Screen Designer interface. At the top, there is a toolbar with buttons: SAVE (orange), UNDO, REFRESH, DELETE, FIND, ATTACH, MORE (dropdown), and RELATED (dropdown). Below the toolbar, the interface is divided into sections. The first section is titled 'Screen Preview' and contains a 'Key Block' control. The 'Key Block' control has four options at the top: a checkbox (checked), a magnifying glass icon, a question mark icon, and an up arrow icon. Below these options, the 'Key Block' control displays a form titled 'Accident Information'. This form includes fields for 'Accident:', 'Unit:', 'Entry Date:', and 'Alternate Unit No.:'. There is also an 'Add Accident' button. The second section is titled 'Unit' and contains a form titled 'Unit'. This form includes fields for 'VIN Number:', 'Owning Dept:', 'Using Dept:', 'License No:', 'License State:', 'Operator:', 'Name:', and 'Operator Dept:'.

Each control has up to four options at the top.

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



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

Navigating the Organize Tab

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

The screenshot shows the 'Screen Designer' application with the 'Organize' tab selected. At the top, there is a toolbar with buttons: SAVE, UNDO, REFRESH, DELETE, FIND, ATTACH, and RELATED. Below the toolbar, the 'General Information' section contains fields for 'Screen Name' (NEW HOMEPAGE), 'Description' (NEW HOME PAGE), 'Allow User Customization' (No), and 'Foundation' (Home Page). The 'Organize' tab is active, showing a 'Sequence the components of this screen.' section. This section includes a 'Theme' dropdown (None) and a 'Color Scheme' dropdown (Classic M5). Below these, the 'Control Positions' section displays a visual representation of the screen layout. It shows a 'Key and Title' area at the top containing 'Screen Title', 'Key Block', and 'Notify Events'. Below this is a 'Content' area containing 'Home Page Favorites', 'Dashboard Meter (instance 5)', and 'Open Jobs By Status'. There are also 'Unused' areas on the left and right sides of the content area. Arrows indicate the sequence and arrangement of these controls.

Theme

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

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

Color Scheme

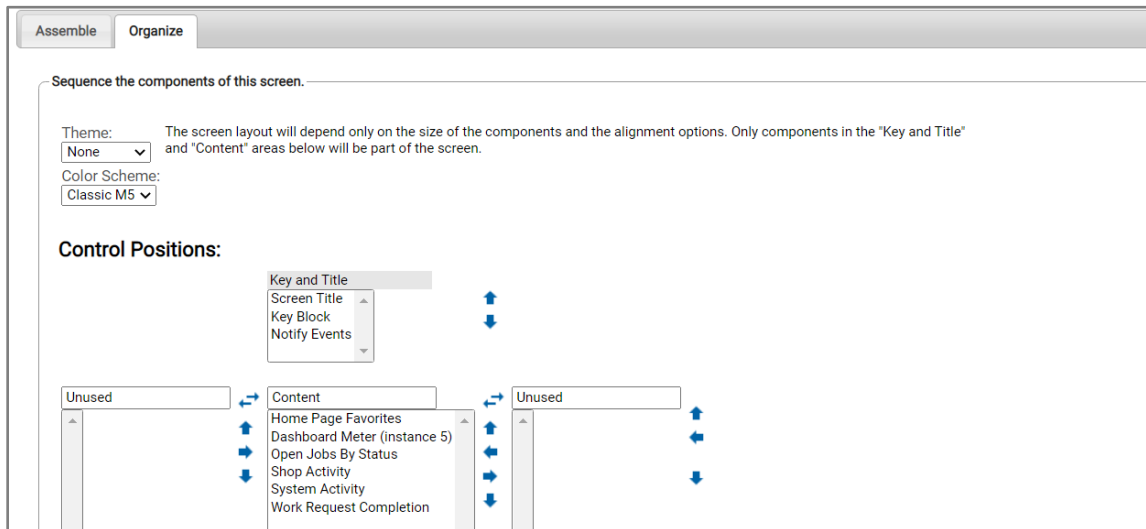
The color scheme choices are classic M5 and portal. Classic M5 shows a faint border around each control whereas the portal design has no border.

Control Arrangement

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

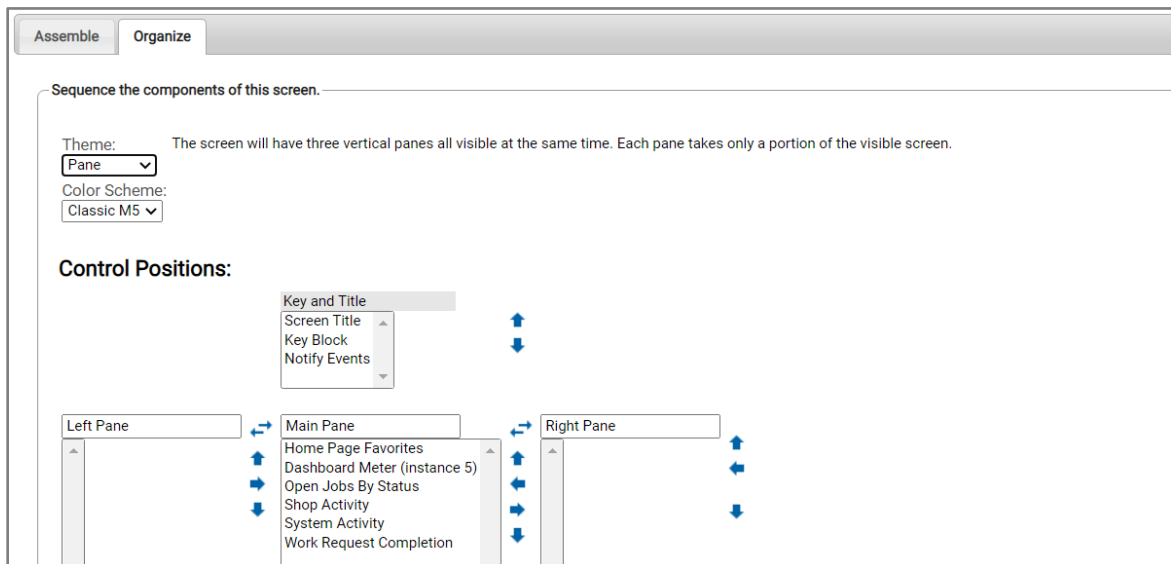
None Theme

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

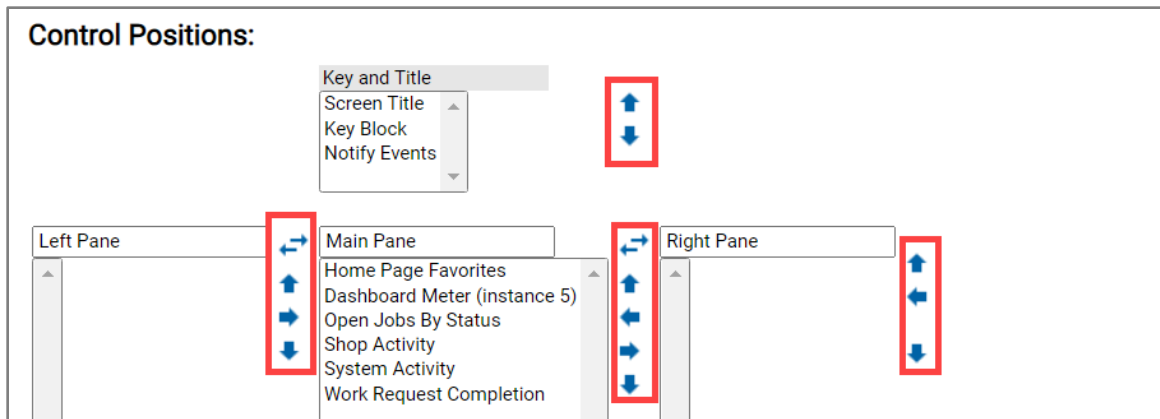


Pane Theme

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



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

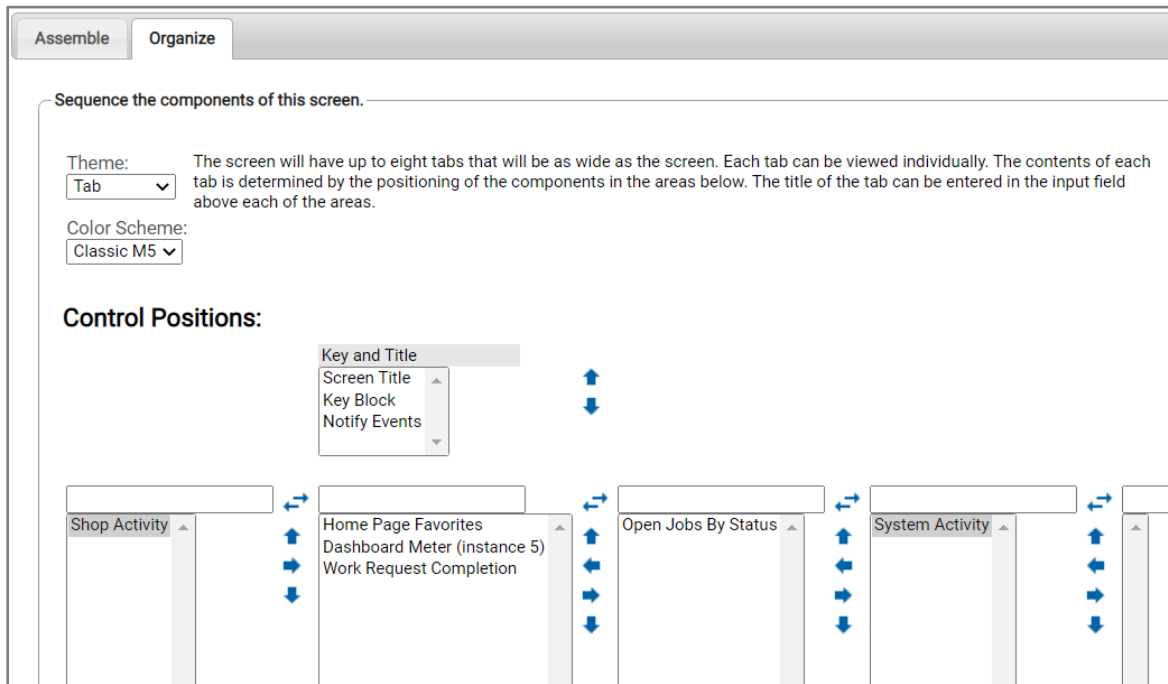


Or use the right and left directional arrows to move the Controls from one pane to another. This is also referred to as a Control Swapper.

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

Tab Theme

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

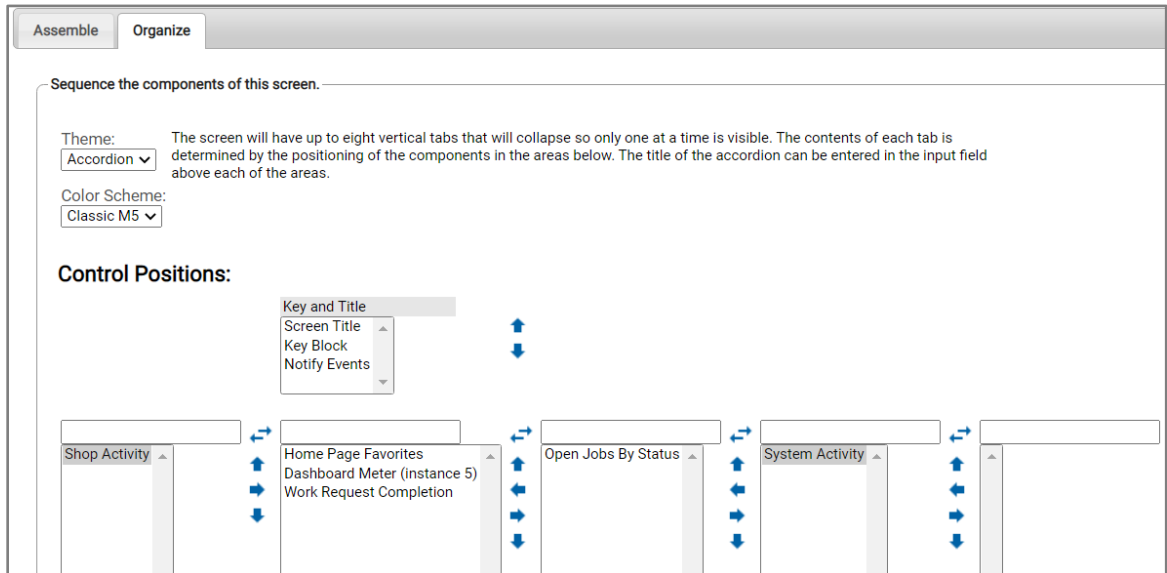


To add a title to the tab, enter the information in the blank space above each tabbed area. The title can contain up to 20 alphanumeric characters.

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

Accordion Theme

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



Section 5. Preview Mode

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

The screenshot shows the 'Screen Designer' application interface. At the top, there is a toolbar with buttons: SAVE, UNDO, REFRESH, DELETE, FIND, ATTACH, and a RELATED dropdown. Below the toolbar, the 'Screen Designer' title is followed by a 'General Information' section. This section contains two columns of form fields: 'Screen Name' (with 'NEW HOMEPAGE' entered), 'Description' (with 'NEW HOME PAGE' entered), 'Allow User Customization' (set to 'No'), and 'Foundation' (set to 'Home Page'). Below the form fields are two tabs: 'Assemble' and 'Organize'. Under the 'Organize' tab, there is a 'Mode' section with three radio buttons: 'Fabrication', 'Preview (shortcut key = ALT+R)' (which is selected and highlighted with a red box), and 'Arrange'. Below the mode selection, there is a text input field with the placeholder 'Control help text example...'. The main content area displays a 'Welcome, [User Name]' message, a 'My Favorites' section with a list of sample frames (Sample Frame 1 through Sample Frame 6), and a 'Work Request Completion' chart. The chart is titled 'Example Data' and shows a grid of data points. The y-axis is labeled 'k Requests' with values 75, 113, and 150. The x-axis is labeled 'On Time' with a green square icon.

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

Section 6. 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 would be as well. The home page foundation is not DAF enabled.

Frame Maintenance

The screenshot shows the 'Frame Maintenance' web application. At the top, there is a toolbar with buttons: SAVE (blue), UNDO (grey), REFRESH (blue), DELETE (blue), and FIND (grey). Below the toolbar is the title 'Frame Maintenance'. The main content area is titled 'Report and Frame Information' and contains a form with the following fields:

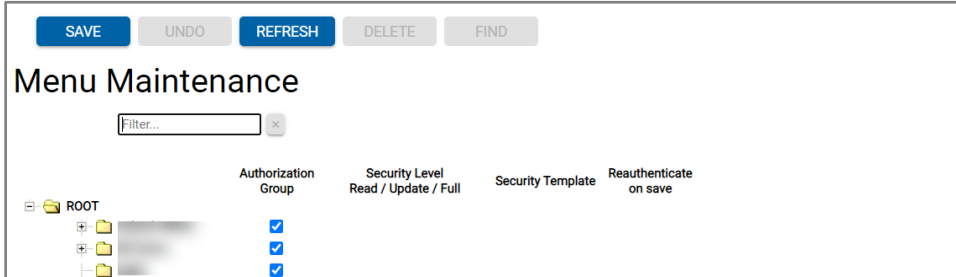
- URL: /PRESENTATION/SCREENDESIGNER/PROCESS.ASPX?INFO=NEW HOMEPAGE
- Type: Frame (dropdown menu)
- Audit: No (dropdown menu)
- Prohibited On Menu: No (dropdown menu)
- Disabled: No (dropdown menu)
- Description: NEW HOME PAGE
- Help URL:
- Authorized With URL: PUBLIC
- Component Name: mfiveUCHomePage.dll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

At the bottom of the form, there is a tabbed interface with two tabs: 'Menu List' (active) and 'Related Hyperlinks'.

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

Menu Maintenance

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



The screenshot shows the 'Menu Maintenance' window. At the top, there are buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', and 'FIND'. Below these is a search bar labeled 'Filter...'. The main area contains a table with the following columns: 'Authorization Group', 'Security Level', 'Security Template', and 'Reauthenticate on save'. The 'Security Level' column has a sub-header 'Read / Update / Full'. The table lists three items under the 'ROOT' folder, all of which have checkmarks in the 'Reauthenticate on save' column.

Authorization Group	Security Level Read / Update / Full	Security Template	Reauthenticate on save
ROOT			<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>

Section 7. Updates

The following updates apply to Screen Designer Overview.

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.