

Screen Designer Work Order

Application Training

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

Section 1.	Overview	5
Section 2.	Technical Support	6
Section 3.	Screen Designer – Work Order	7
Assemble	e tab	7
Over	view of Controls	7
Addir	ng Controls	8
Addir	ng Help Text to a Control	9
Adding Fields to a Frame		10
Addir	ng the Version Number	11
Section 4.	Work Order Foundation Controls	12
Screen Ti	itle	12
Key Block	k	12
Work Red	quest List	13
Work Red	quest Plan List	13
Work Ord	der Information	14
Visit Infor	rmation	15
Work Order Express Complete, Close, and Cancel		16
Meter Info	ormation	16
Contact Information		17
Cost Summary		18
Cost Summary (Wide)		19
Misc. Links		20
Job Inforr	mation	21
Labor Ch	narge Information	22
Commerc	cial Charge Information	23
Stock Par	rt Charge Information	24
Comm Su	ummary	25
Authorize	ed Comm Amounts	25
Fluid Cha	arge Information	26
Material S	Summary	27
Non-Stoc	ck Part Charge Information	27
Equipmer	nt Condition	28
Associate	28	
Attachments		29
•	mage Display	
Image De	etail	30
Break Ins	stance (1-9)	30
	n Instance (1-6)	
Cancel B	Button	30

Section 8.	Updates	40
Menu Maintenance		39
Frame Maintenance		38
M5 Security		38
Section 7.	Published Screen Changes Considerations	38
Section 6.	4. Preview Mode	37
Control Arrangement		
Color Scheme		
Accordion		
Tab	35	
Pane.	34	
None		34
Theme	-	33
Section 5.	Organize tab	33
Multiple Component Items		32
Multiple Department Items		31
Multiple Unit Items		31
Multiple Work Order Items Instances (1-4)		31
Item Instances (1-12)		31
Static Message Viewer (1-4)		
	31	
	31	
Hyperlinks		30

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 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.

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.

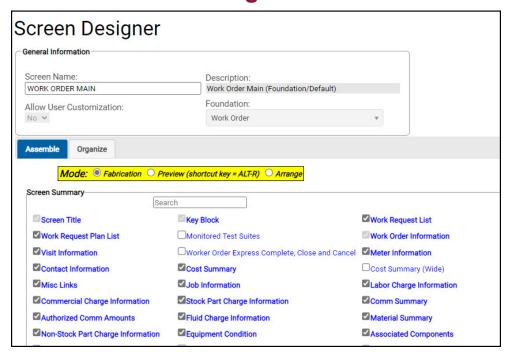
Telephone: 800.900.8152

Email: <u>M5Support@AssetWorks.com</u>

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 – Work Order



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.
- 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 the control. These are set by AssetWorks if the data must be present for the business logic to function.

Adding Controls

Complete the steps to create a custom Work Order Main frame.

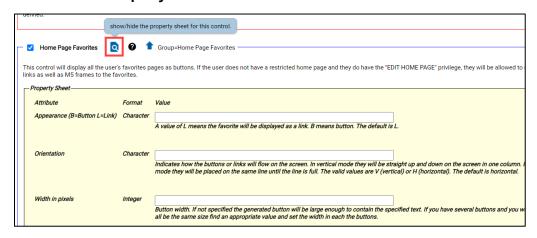
1. Enter a **Screen Name**, **Description** and select **Work Order** from the foundation dropdown. After **SAVE**, verify that you are on the **Assemble** tab of the frame.



- 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** 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.
 - 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.
- 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.



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

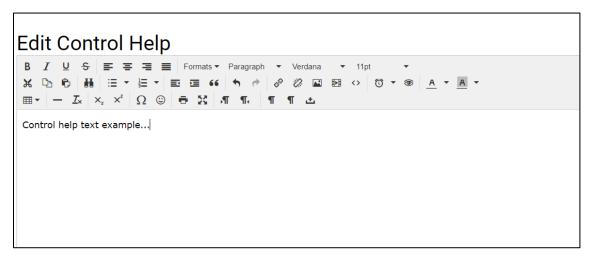


5. In the *Preview Control* section, if there is a **Note Pad** icon to the right of the control name, there is a property sheet for the control. Please note, not all controls have property sheets and not all property sheets are the same for the controls. To display the control's property sheet and make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

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

Adding Help Text to a Control

To add user-defined help text, select the **Question** (*) 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 frame.

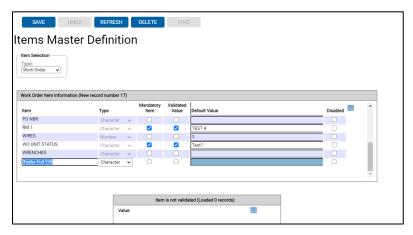
Adding Fields to a Frame

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.

Complete the steps to add a new field to the frame.

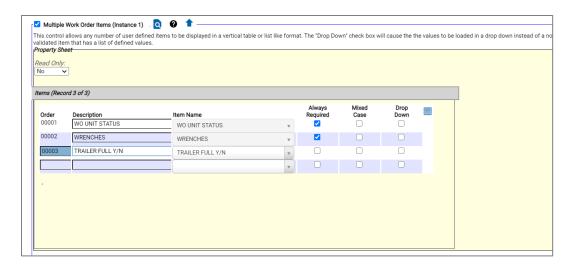
1. The item must be set up on the *Item Master Definition* frame. The item **Type** must be *Work Order*. In this example, a new item will be added for Trailer Full Y/N.



- 2. 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.
- 3. 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.

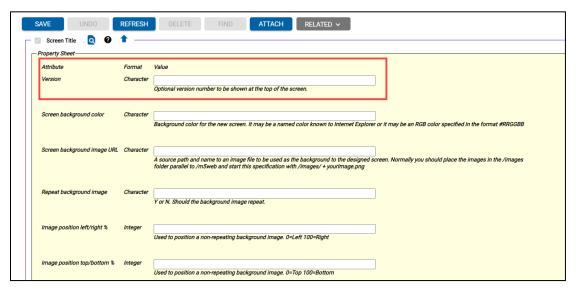
For example, if there is more than one work order item that should be displayed as a group, then use this option. Controls called Item (instance 1 thru 12) allow for only one work order item to display as a field.

4. 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).



Adding the Version Number

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

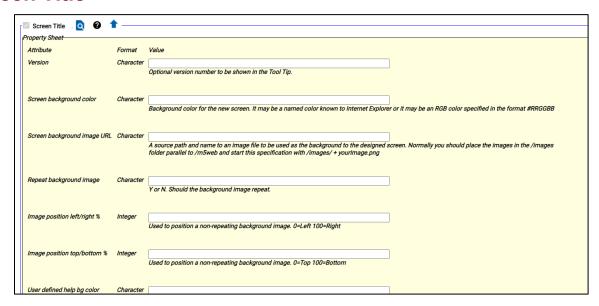


Complete the steps.

- 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.

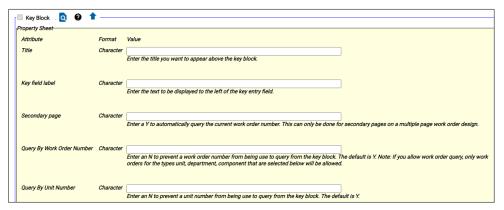
Section 4. Work Order Foundation Controls

Screen Title



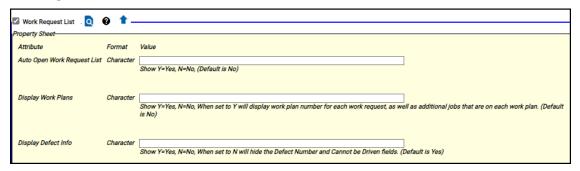
The **Screen Title** control allows you to change the overall look of the form such as font, background color, color of help text, designate an image as background, or alignment of help text.

Key Block



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



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).

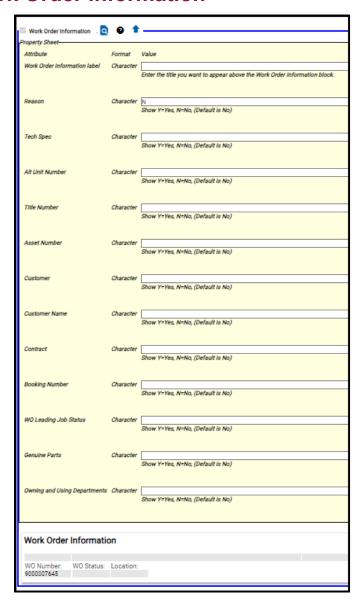
Display Work Plans – Show Y=Yes, N=No. When set to Y will display work plan number for each work request, as well as additional jobs that are on each work plan. (Default is No).

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



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.

Attributes:

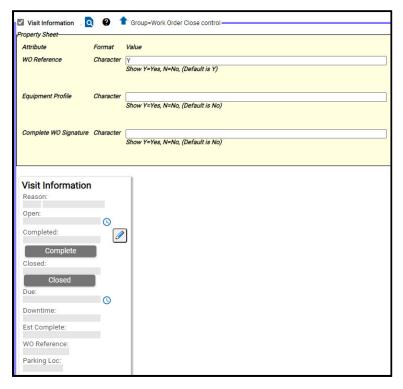
- Work Order Information label To change the label for the control. Enter the title you want to appear above the Work Order Information block.
- Reason The work order reason.
- Tech Spec
- Alt Unit Number
- Title Number

- Asset Number
- Customer
- Customer Name
- Contract
- Booking Number
- WO Leading Job Status
- Genuine Parts
- Owning and Using Departments

Value

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

Visit Information



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:

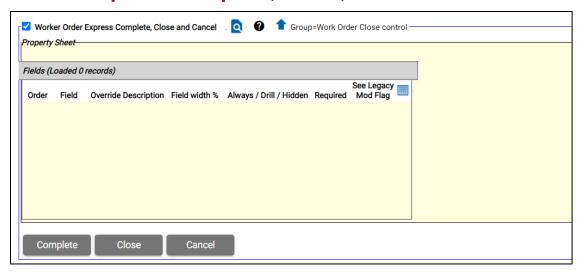
WO Reference

- Equipment Profile
- Complete WO Signature

Value

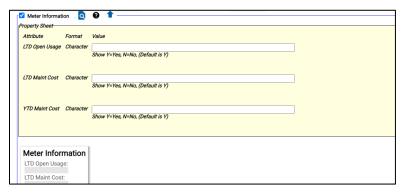
Show Y=Yes, N=No (Default is No)

Work Order Express Complete, Close, and Cancel



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



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

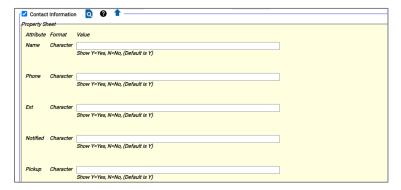
Attributes:

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

Value

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

Contact Information



The **Contact Information** control Property Sheet.

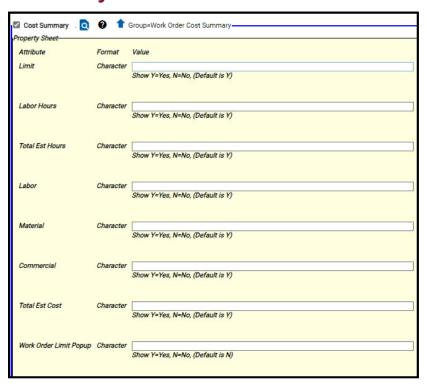
Attributes:

- Name
- Phone
- Ext
- Notified
- Pickup

Value

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

Cost Summary



The Cost Summary control displays the cost Limit, total Labor and Hrs, total Estimated hours, Labor costs, total Material (parts and products), total Commercial, Total Est Cost, and Work Order Limit Popup.

Attributes:

- Limit
- Labor Hours
- Total Est Hours
- Labor
- Material
- Commercial
- Total Est Cost
- Work Order Limit Popup

Values

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

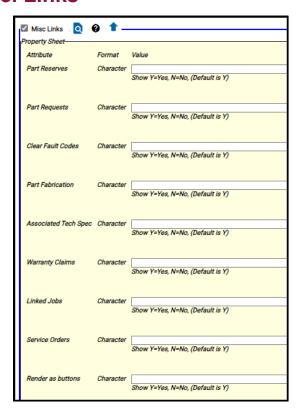
Show Y = Yes, N = No, (Default is N) – Work Order Limit Popup only

Cost Summary (Wide)



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



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

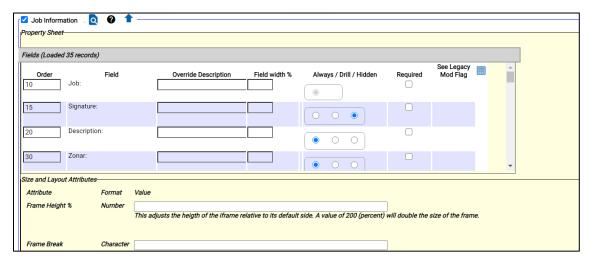
Attributes:

- 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)

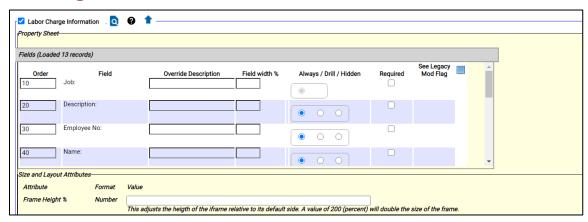
Job Information



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 is 10. 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.

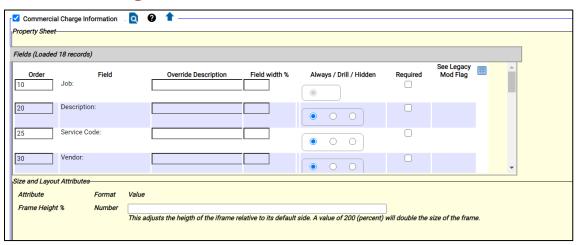
Labor Charge Information



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 is 10. 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.

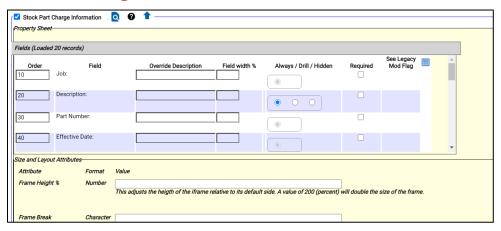
Commercial Charge Information



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 is 10. 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.

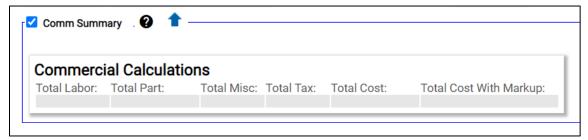
Stock Part Charge Information



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.

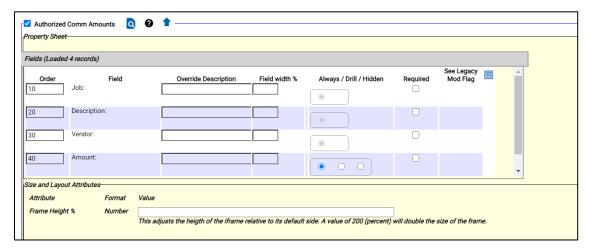
- Frame Height % Default is 200. This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.
- Frame Break By default the frame will insert a break and start at the left side of the screen. Enter "N" to not break and allow the frame to be automatically positioned.
- **Drill Height** % Default is 10. 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



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.

Authorized Comm Amounts

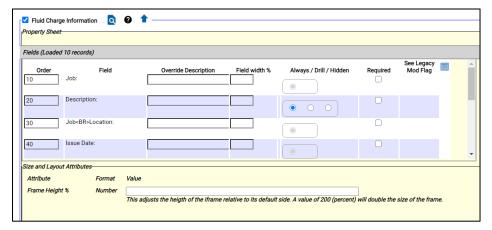


The **Authorized Comm Amounts** control contains fields and attributes for every field that exists for authorizing commercial repairs performed by vendors within the **Comm** tab on *Work Order Main*. The order of the fields can be changed, the description of the fields can also be changed, and each 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 is 10. 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.

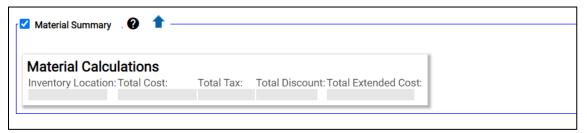
Fluid Charge Information



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.

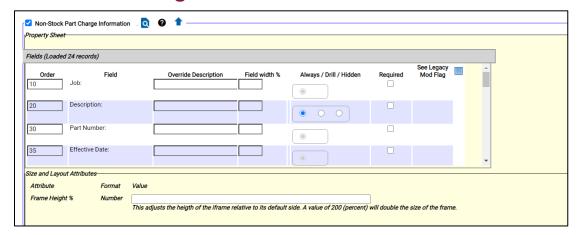
- Frame Height % Default is 200. This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.
- Frame Break By default the frame will insert a break and start at the left side of the screen. Enter "N" to not break and allow the frame to be automatically positioned.
- **Drill Height** % Default is 10. 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



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

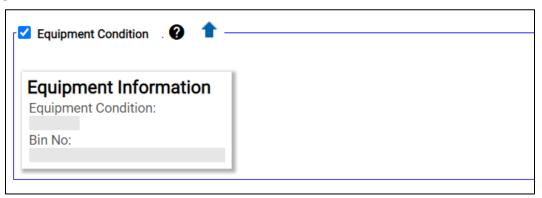


The **Non-Stock Part Charge Information** control contains fields and attributes for every field that exists for non-stock parts within the **Part** tab on *Work Order Main*. The order of the fields can be changed, the description of the fields can also be changed, and each field can always be displayed. 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.

- 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 is 10. 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.

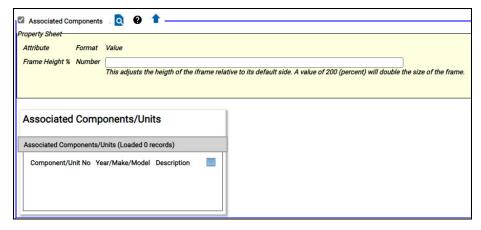
• **Drill down column width** –The number of columns to be shown side by side in the drill down area. The default is 1.

Equipment Condition



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

Associated Components/Units

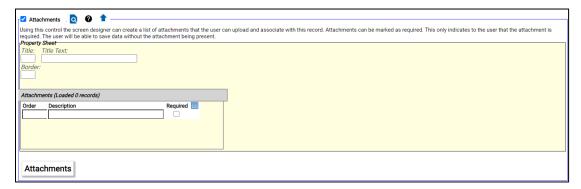


The **Associated Components/Units** control allows you to view components within work orders.

Attribute and Value:

• 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.

Attachments

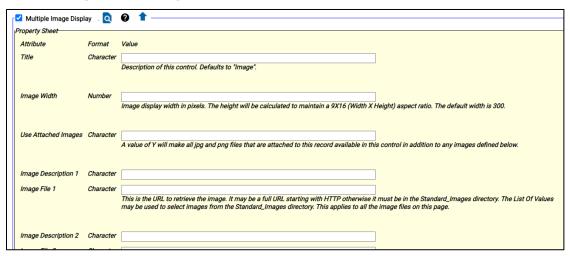


The **Attachments** control allows for another set of attachments to work orders and these attachments can be made required.

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



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.

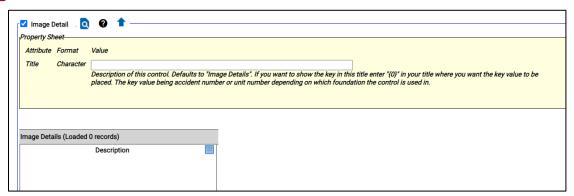
The static images are in a directory called /controls/common/standard_images. If you are going to use this control, then you will also need the **Image Detail** control that will allow the user to document the damage.

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



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

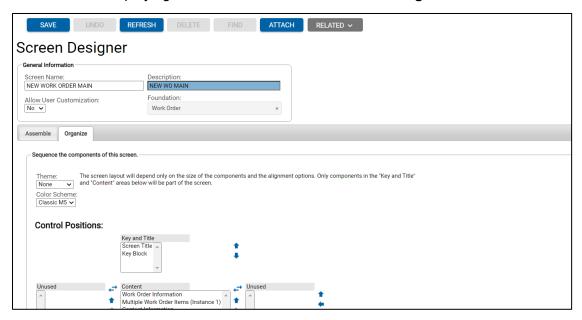
The **Multiple Department Items** control allows any number of user-defined items to be displayed in a vertical table or list like format. The **Dropdown** check box will cause the values to be loaded as dropdown instead of a normal input field with an LOV. This only takes affect if the item is a validated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

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.



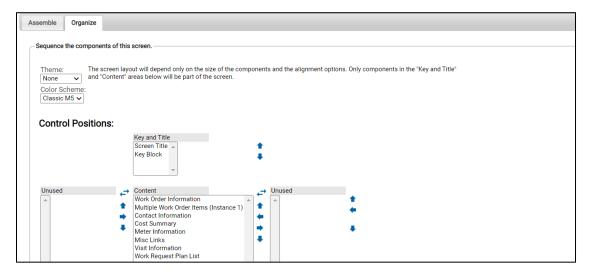
Theme

The **Theme** is used to determine how the controls are presented on the frame. 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.

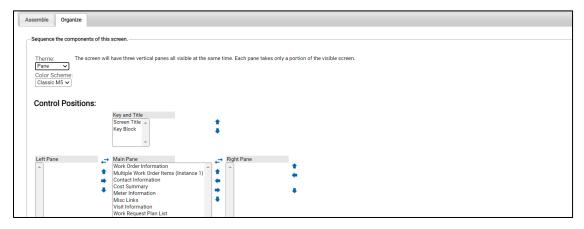
None

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.



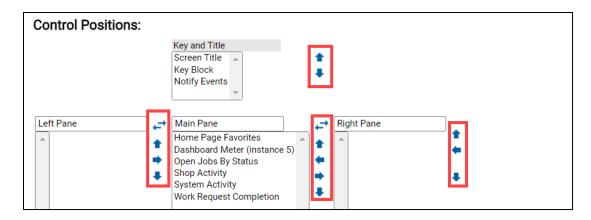
Pane

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.



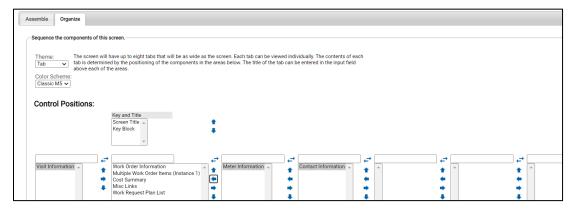
The left and right directional arrows permit the designer to move the panes from their current location to another one. This is also referred to as a **Pane Swapper**. This only makes sense if the pane contains data that is narrow when displayed. Hovering the mouse over the directional arrows provides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



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.

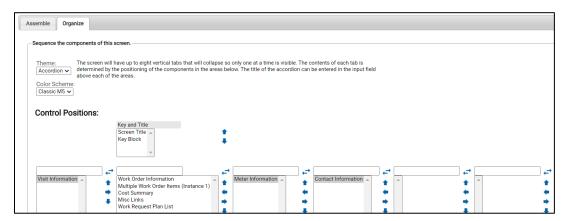


To add a title to the tab, enter the information in the blank space above each tabbed area. The title can contain up to 20 alphanumeric characters.

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.



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.

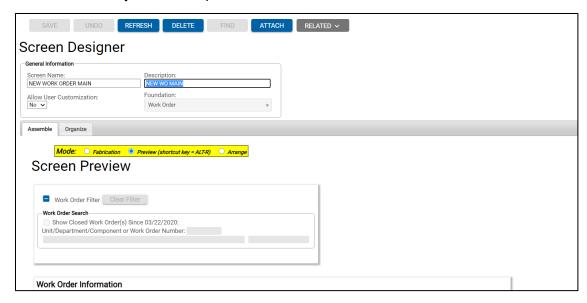
Control Arrangement

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

Section 6. 4. Preview Mode

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



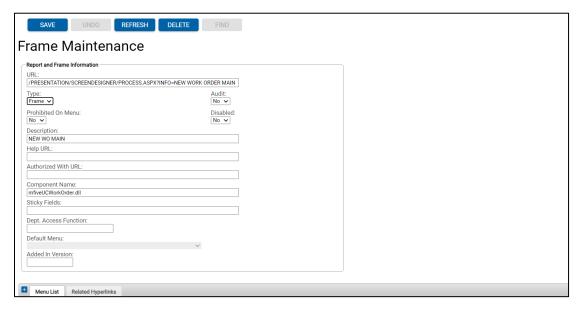
The final step is to select the **SAVE** icon to finalize your changes.

Section 7. Published Screen Changes Considerations

M5 Security

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

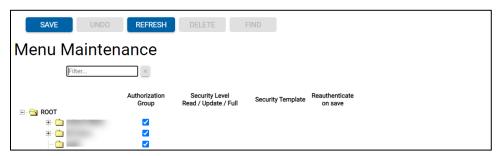
Frame Maintenance



The frames created by Screen Designer, after saved, creates 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.



Section 8. Updates

The following updates apply to Screen Designer Work Order Application Training.

Release	Section	Description
25.0	Work Order Foundation Controls	Added new Associated Components/Units control.
24.4	Cost Summary (Wide)	Added new Work Order Limit Popup as an Attribute.
24.3	Work Order Information	Added new Owning and Using Departments Attribute.
24.3	Cost Summary	Added new Work Order Limit Popup as an Attribute.
24.1	<u>Visit Information</u>	Added new image with Work Order Signature as an Attribute.
23.2	All Sections	Applied miscellaneous writing style updates throughout the document.