AssetWORKS

Screen Designer - Accidents

Application Training

Version 24.x
Last Modified 24.0 | March 2024

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Customer Support is available Monday through Friday, 7:00 a.m. to 7:00 p.m., Eastern Time.

Telephone: 1-610-225-8300

Email: M5Support@AssetWorks.com

Website: Community.AssetWorks.com

The support website can be used to open issues, subscribe to user groups, and download documentation, as well as to access the latest AssetWorks news. For secure access to the website, contact Customer Support by calling the number above.

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M5 Screen Designer Goals

The M5 Screen Designer accomplishes these goals:

1. Allows the client to develop their own screens in M5 by reordering the frame layout as well as adding fields, removing fields, and reordering fields.
2. Provides an additional level of security beyond Field Security Templates. The custom frames can display a limited view of the data and sensitive fields can be removed.

Overview

To support this functionality, M5 frames will be designed and built in small pieces. These pieces are logical and self-sufficient. They contain related data fields. These pieces are referred to as a User Control. The designer can build multiple frames from the same User 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. 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.

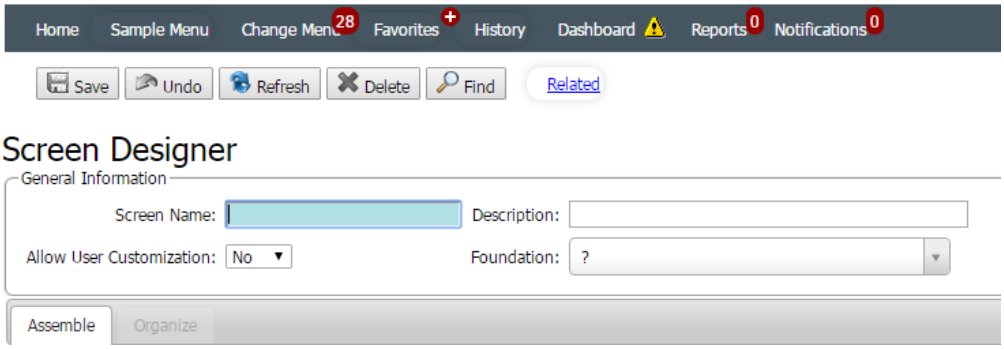
At present the Unit Main, Unit Items, Accident Entry and Accident Items have been redesigned using this new architecture.

Steps to Creating New Frames

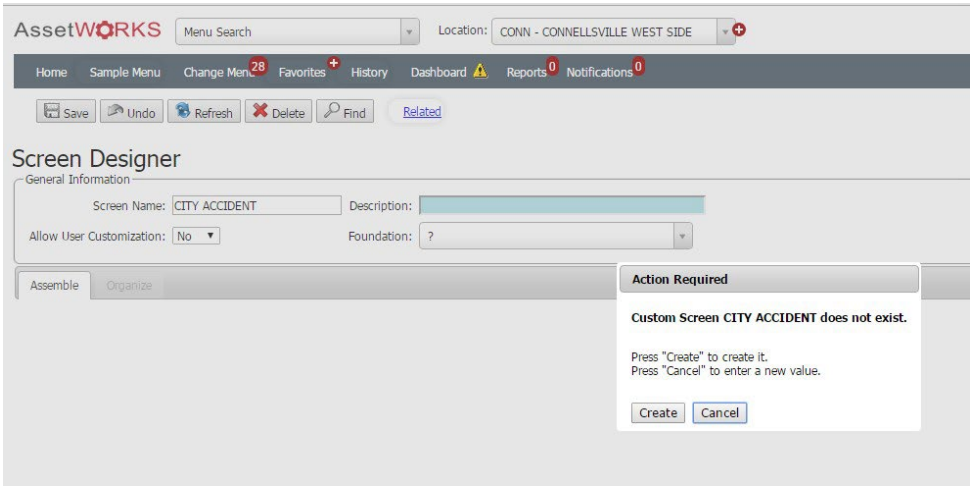
1. Create the new frame using the Screen Designer frame.
2. Create 'director' frame, if needed. The 'director' foundation can be used to link frames together like a menu of frames. Refer to Appendix A.
3. Assign the newly created frame to the appropriate menu.
4. Assign the menu to the appropriate roles as needed.

Fabrication Mode

To construct a new frame, navigate to the Screen Designer frame.



1. **Screen Name:** Enter the new frame name that is being built in the Screen Name field. The frame name may be alphanumeric and up to 30 characters. Press the Tab key. The following pop-up message appears:



2. Select the Create button to create the new frame. This immediately creates an entry in Frame Maintenance for this new frame.

3. **Description:** Enter the frame description. The frame description can be alphanumeric and up to 60 characters.

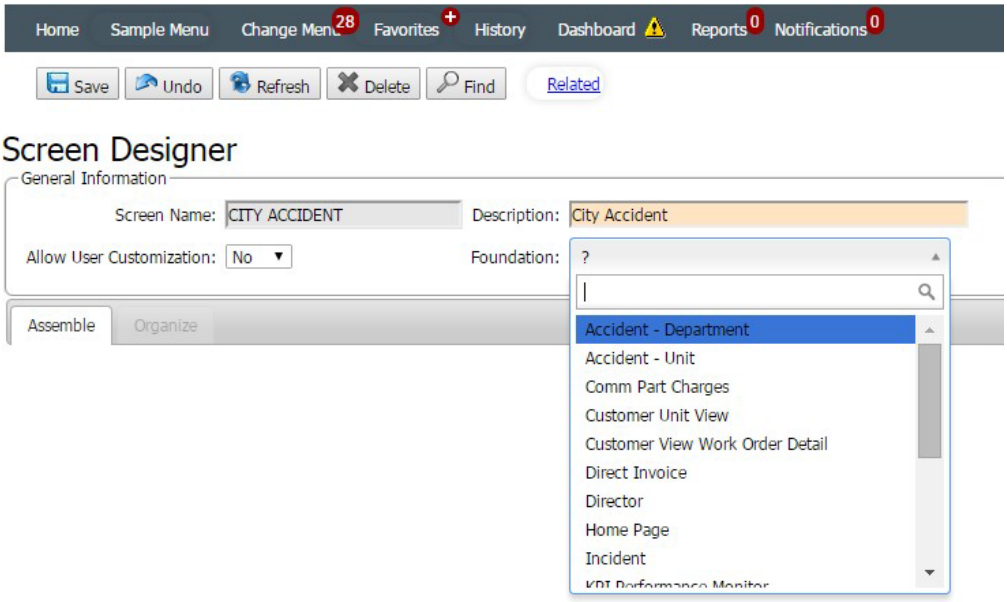
4. **Allow User Customization:** Select Yes or No to allow an end user to rearrange the frame. See User Customization Section for more details.

5. **Foundation:** Select the foundation frame to use by using the dropdown menu. The following foundation frames are available:
   a. Accident – Department –Allows an accident frame to be developed against a non-unit.
   b. Accident – Unit – Allows all controls necessary to create an accident form for a unit.
   c. Customer Unit View
   d. Customer View Work Order Detail
   e. Direct Invoice
   f. Director – Uses Accident Categories to direct the user to different accident forms.
   g. KPI Performance Monitor – Currently not in use.
   h. Message Editor
   i. Portal Login
   j. Unit Maintenance – Requires all controls necessary to create a new unit record.
   k. Unit Maintenance (no creation) – Does not allow a new unit to be created.

What is a foundation? It is a logical group of User 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 User Controls.

Foundations define the mandatory User 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.



6. Press Tab and the form will automatically be saved.

Assemble Tab

Overview of User Controls

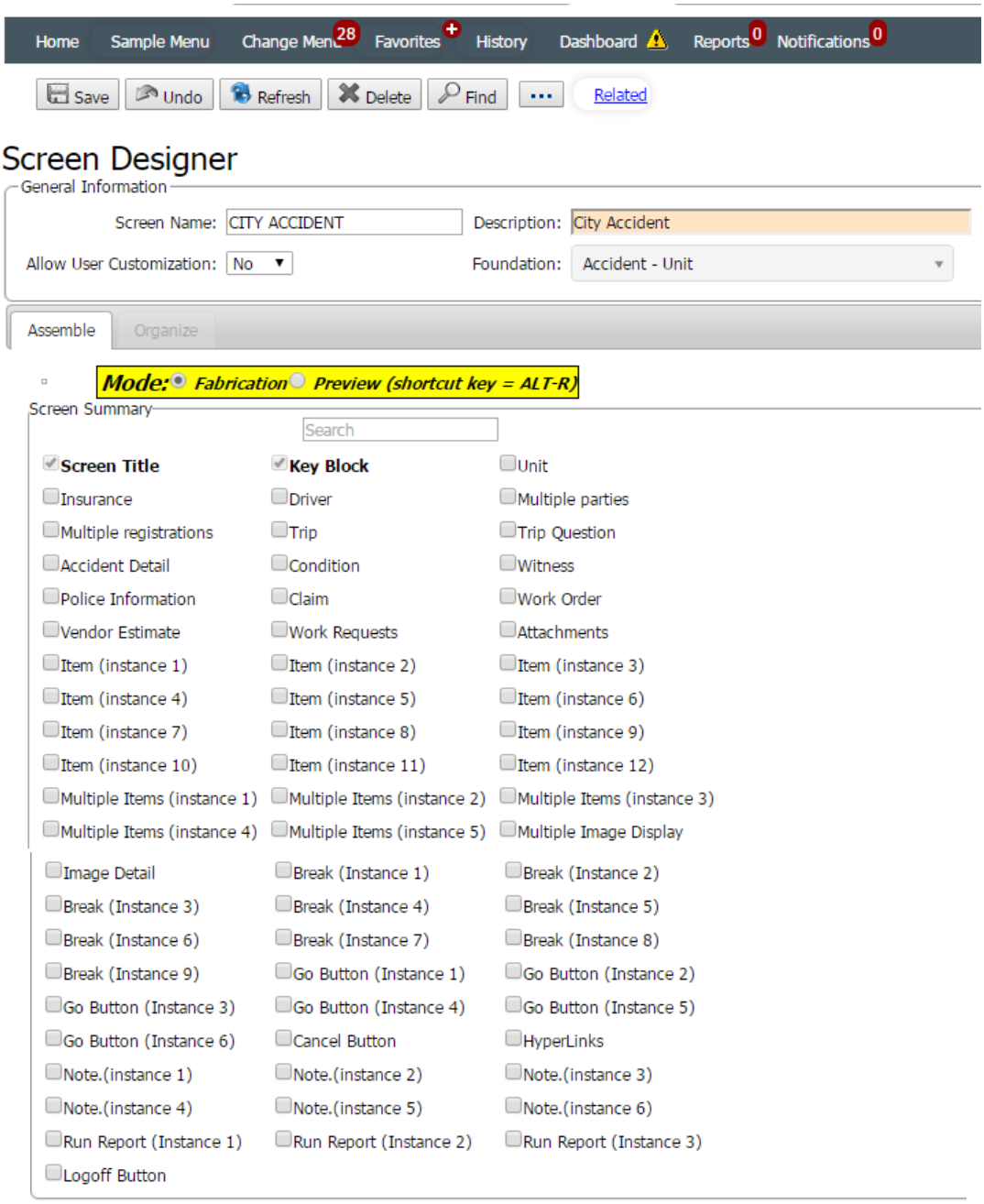
What are User Controls? These are simply small pages of information. Each group of logically related fields is a separate User Control. Their relationship to other User Controls is established by the foundation.

User Controls deal only with its own fields. There are no direct references to another User Control's fields. The other User Control may not be on the frame and direct references would cause a failure.

There is no guarantee of User Control order. User 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 User Controls

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

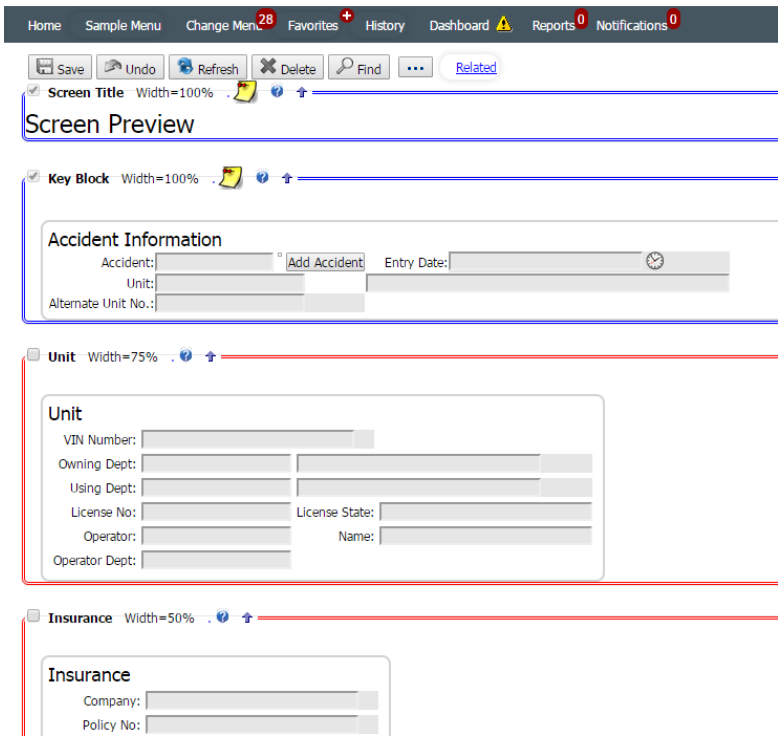


2. There are two modes with radio buttons: “Fabrication” and “Preview”. Select the radio button for “Fabrication” when adding User Controls to the frame. Select the “Preview” radio button to review the custom frame that was designed.

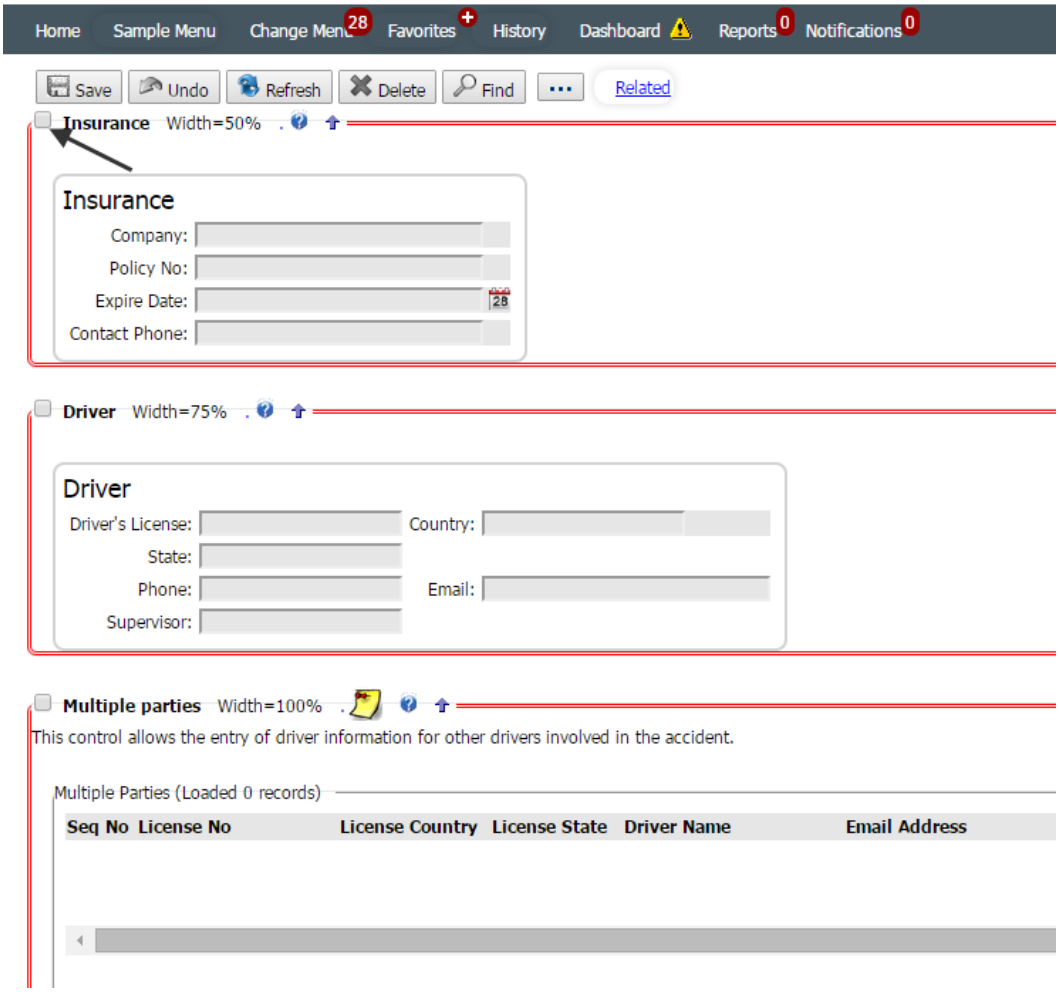
3. There are two sections for the “Fabrication” radio button:
    a. Screen Summary Section
    b. Preview User Control Section

4. In the Screen Summary section:
   User Controls that are required on this frame are automatically checked. The User Controls can be selected by selected the checkbox in front of the specific User Controls.

5. Preview User Control Section
    a. User Controls are selected by a sample image, for example:



6. Any User Control selected displays a blue border. User Controls not selected have a red border. In addition to the required User Controls, any additional User Control groups can be selected by selecting the checkbox to the left of the User Control.



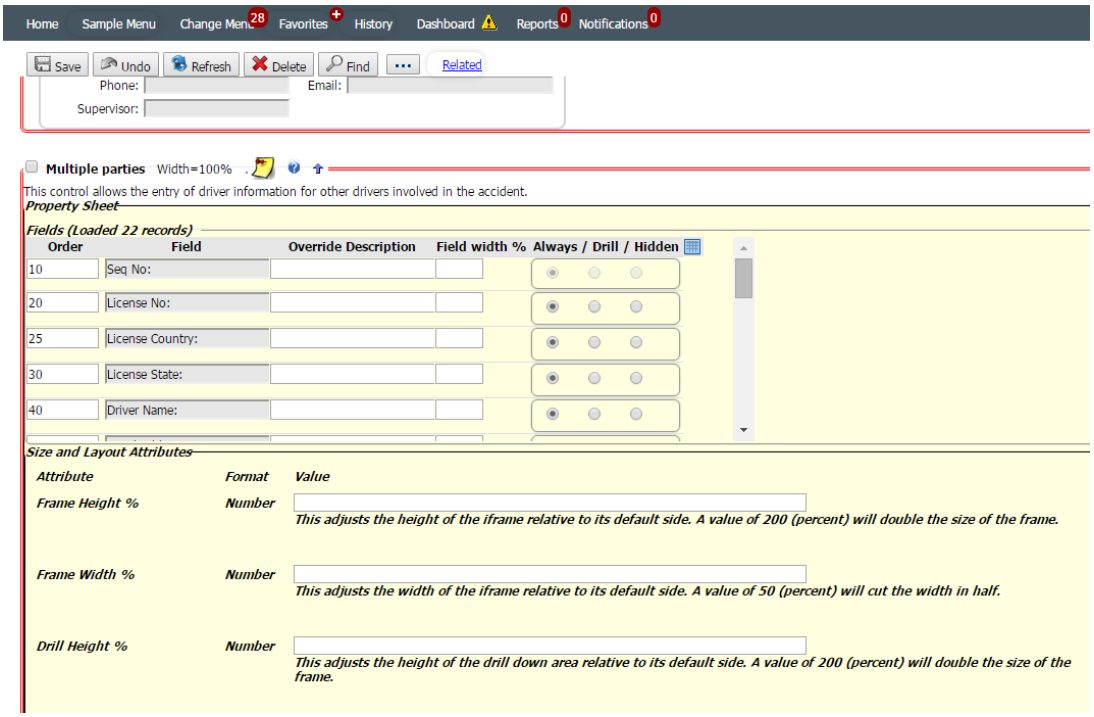
After the checkbox is selected, the square will turn blue.

7. Next select the Property Sheets ( ) for the selected User Controls.

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

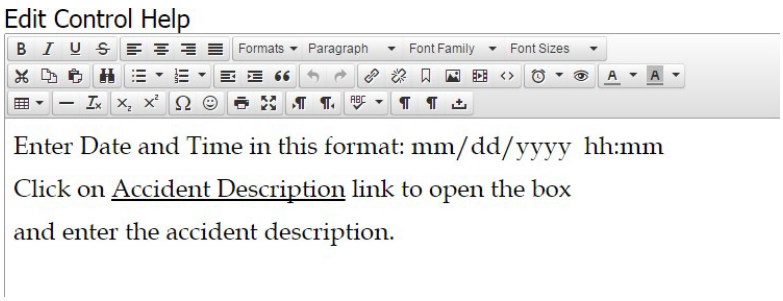
make changes, select the Icon.

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

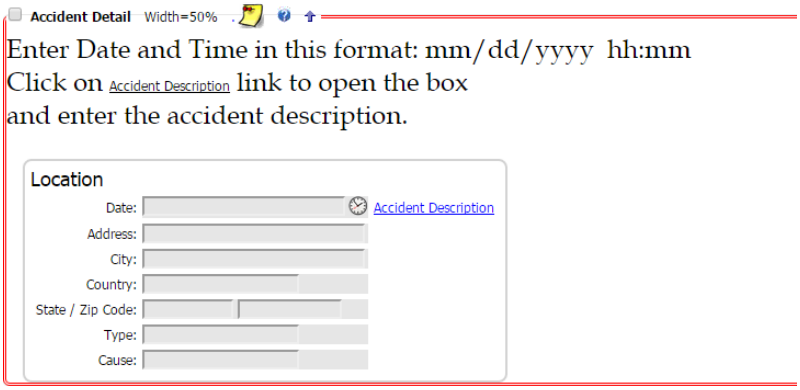


Adding Help Text to a Control

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 user control on the frame as shown below.

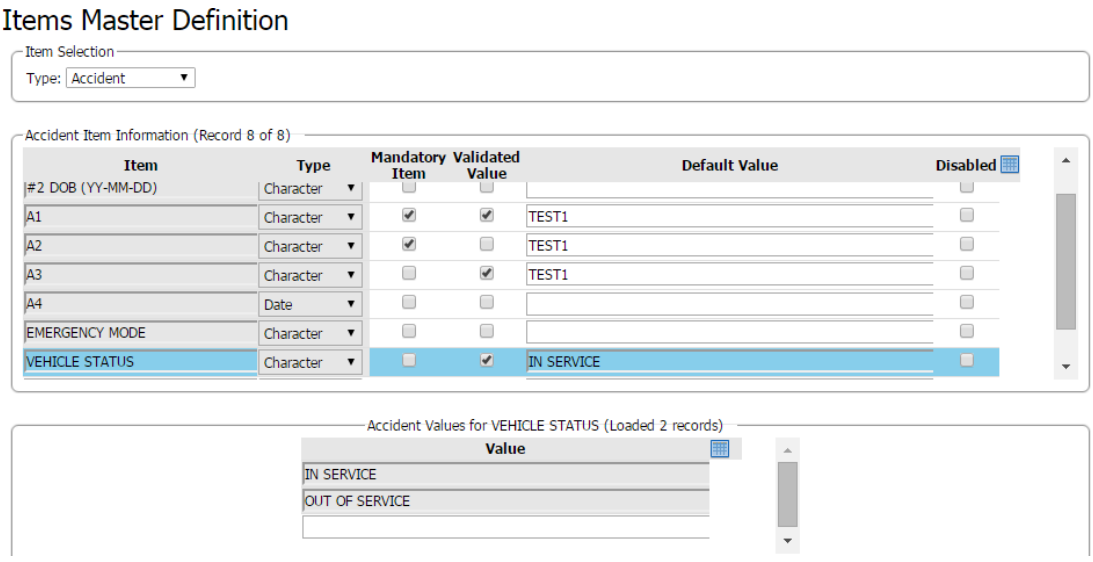


Adding Fields to a Frame

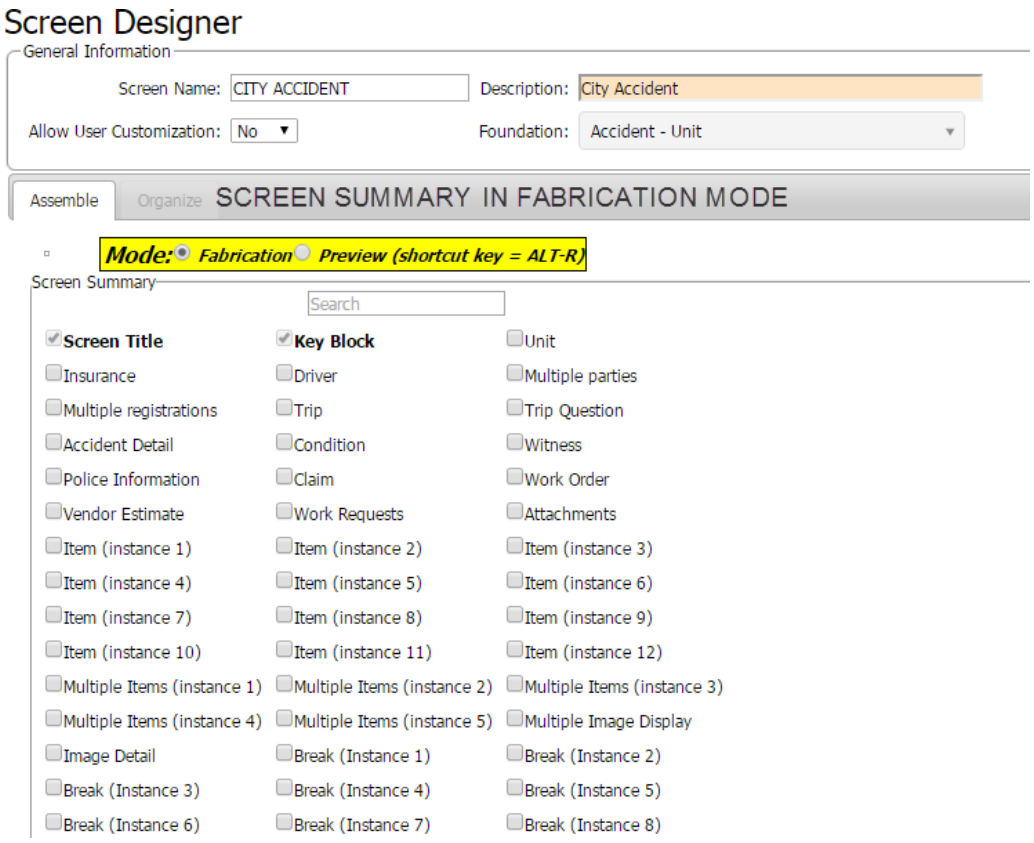
User fields are added to the frame as items. Items reside in a separate table. There are two User Controls for adding items:

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

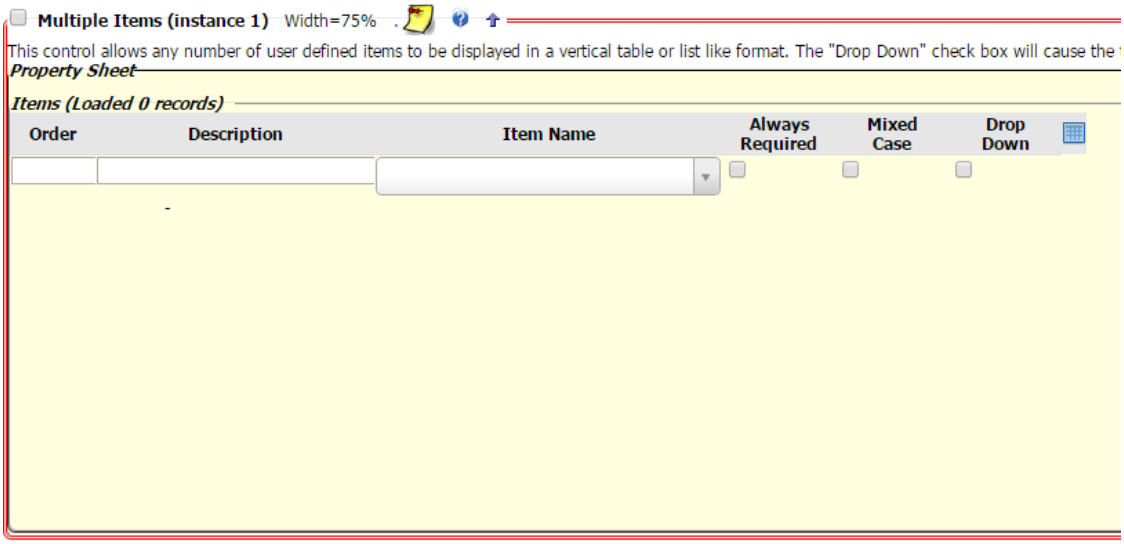
In order to add a new field to the frame, that item must be set up in the Item Master Definition frame. The item type must be 'Accident'. In this example, a new item will be added for Vehicle Status as shown below:



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 User Control” section.

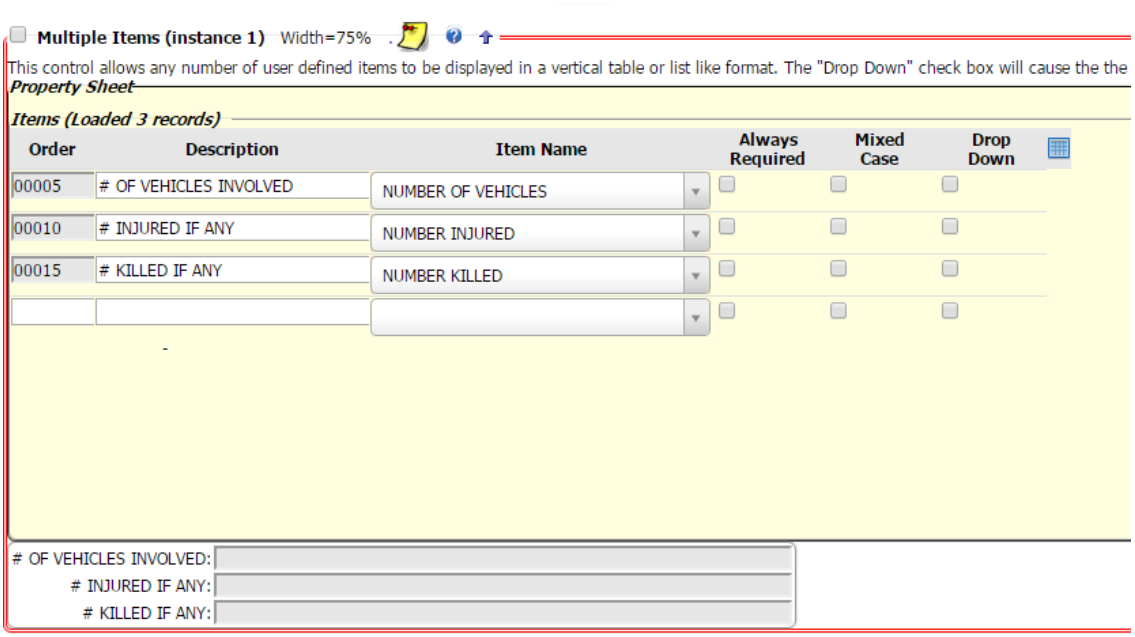


When a Multiple Items Instance is first selected, select the icon. By selecting Multiple Items, the designer can pick and choose what items to display on the frame. This does **not** have anything to do with the Unit Items hyperlink.

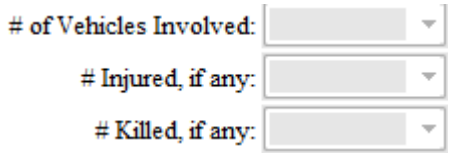


For example, if there is more than 1 accident item that should be displayed as a group, then use this option. Item (instance 1 thru 12) allows for only one accident item to display.

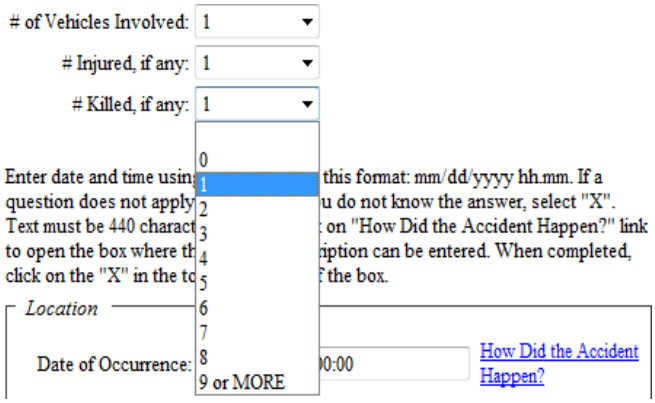
An example is shown below. The Description is the field label the user will see on the frame. It is case sensitive. Double-click in the Item Name to select the corresponding accident item.
Always Required makes the field required entry on the new frame. Dropdown is used to view a list of values by selecting the down arrow as shown below. If the accident item has a list of values and dropdown is not selected, then the user will be able to use the Binoculars icon or double-click in the field.



Here are the results when 'previewing' the frame.

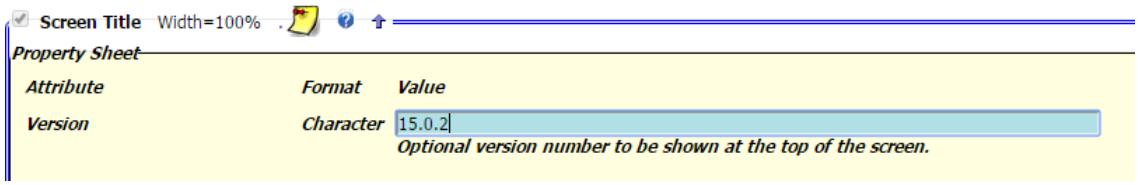


And this is what the user would see in M5.



Adding the Version Number

By entering the version number, the new frame will have this version number next to the frame name.



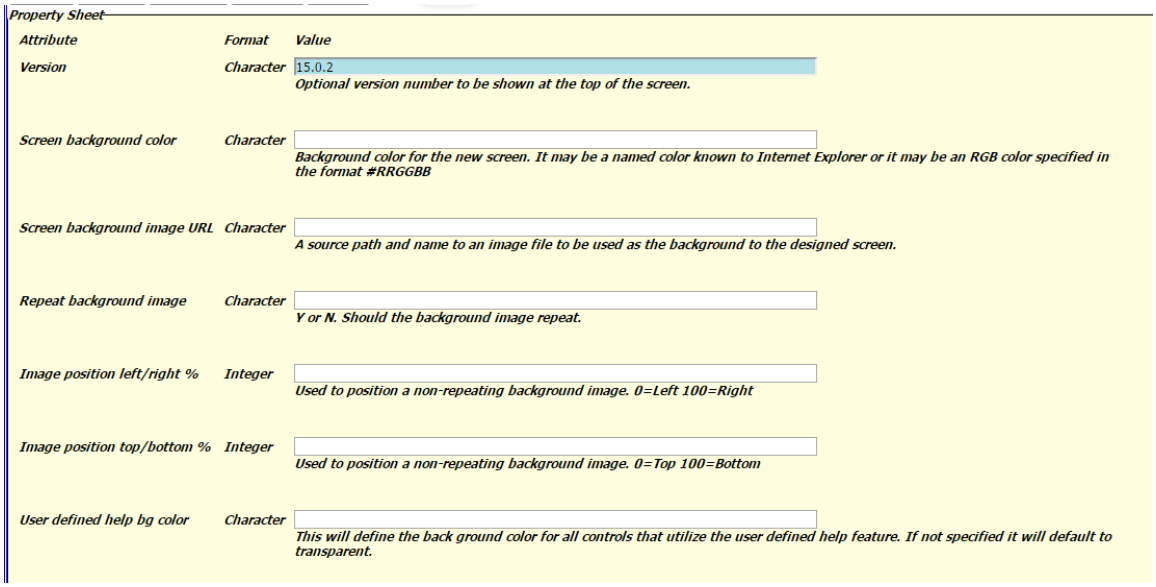
It is important to add the M5 Version when this frame was created.

1. Navigate to the Property Sheet for the Screen Title control in the Preview User Control section.
2. Select the Note Pad ( ) icon.
3. Enter the Version number.

Describing the Various Controls

Screen Title Control

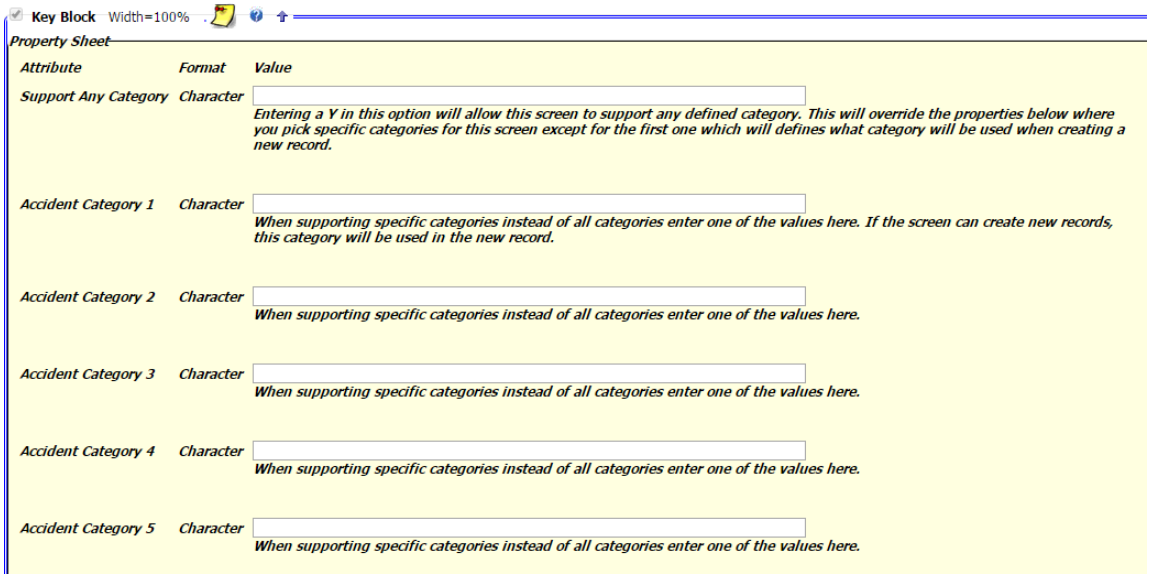
By selecting the Properties for the Screen Title control, the designer can change the overall look of the form such as font, background color, color of help text, designate an image as background, or alignment of help text.



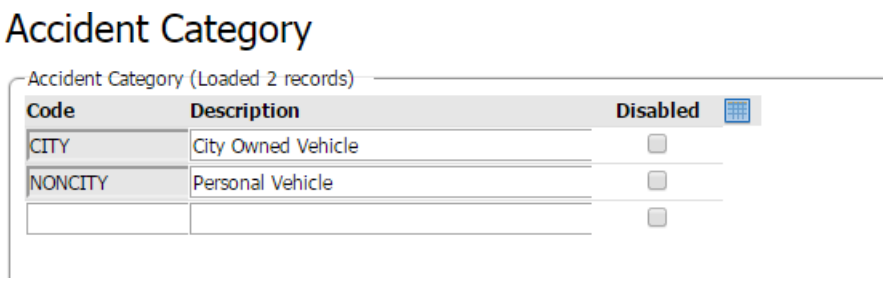
Key Block Control

The Key Block control allows the designer to associate one or more 'accident category(s)' to the form. The Accident Category frame allows the designer to create categories in order to have forms talk to each other. For example, one agency may have their own accident form, but the City may also have their own form which contains some of the same information as the agency form. By categorizing the forms, you can enter data once in the agency form and have it populate the same field in the City form. If no category is entered, then the form being designed is a standalone form and does not push or pull data to or from another form.

The name of the section can also be changed here. The default when viewing the form is "Report Information". The Automatic Query attribute is important if there are multiple forms created using buttons that really are one form. This will be mentioned later when discussing buttons, but buttons perform an automatic save. So if there are multiple forms created using buttons, this attribute must be set to **Y.**



The designer can double-click in any of the Accident Category attributes to see what categories are available.

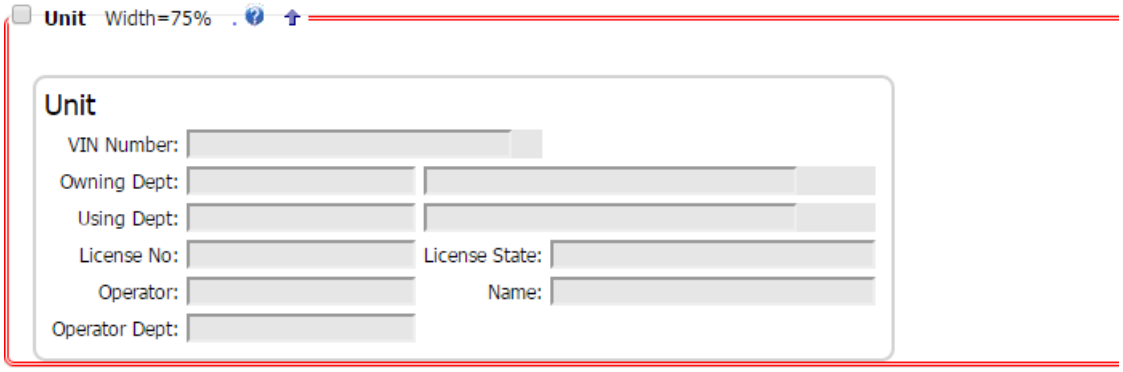


Hot Links Control

The default is that the More Unit Information hyperlink is disabled; however, if you want the hyperlink on your form, then select the Hot Links control. There are no properties for this control; however, there is help text if you require it. Below is what the user would see on the form. It is all or nothing, meaning, the designer cannot chose which hyperlinks display, you get them all.

Unit Control

This information will be auto populated with data from Unit Main after the vehicle in the accident is entered. Only help text can be entered for this control.

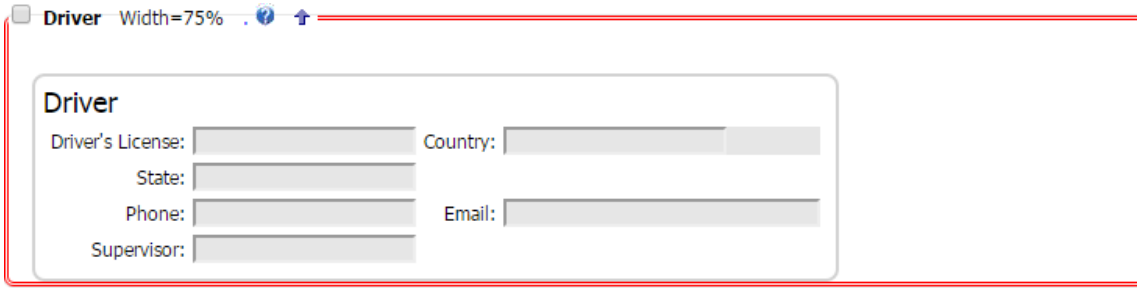


Insurance Control

Nothing can be changed on this control other than help text can be added.

Driver Control

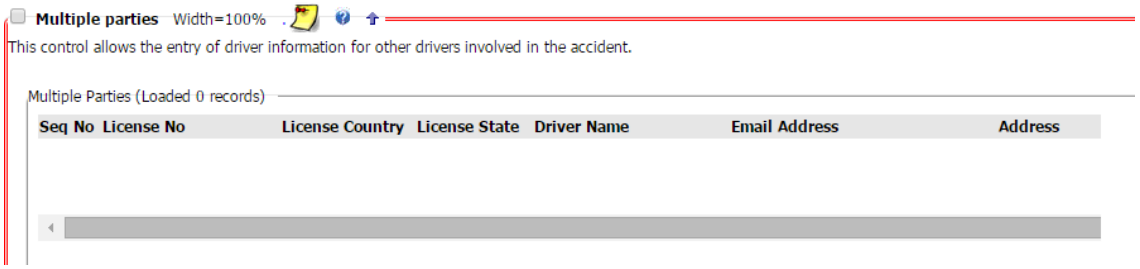
Country defaults to the country defined by System Flag 5007. Only help text can be added for this core control. If there is only one driver involved in the accident, then this control may suffice; however, if there are multiple drivers involved, please refer to the *Multiple Parties* control further in the document.



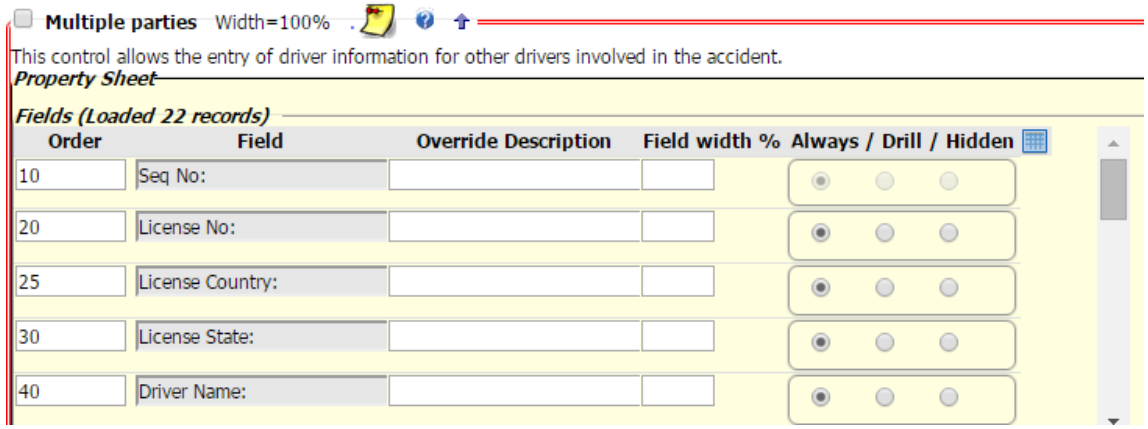
Multiple Parties Control

The Multiple Parties controls allows you to enter more than one driver involved in the accident. If there are multiple vehicles involved, multiple drivers would need to be entered.
There are flags in this control to indicate if they are a driver, witness or injured. However, further down in this document, the Witness control is probably a better place for witness and injured information.

The designer can designate which fields in this control are to be used, the arrangement of where the field should display as well as the ability to change the field name. As with all controls, help text can be created for this control.



To edit this control, select the notepad icon.



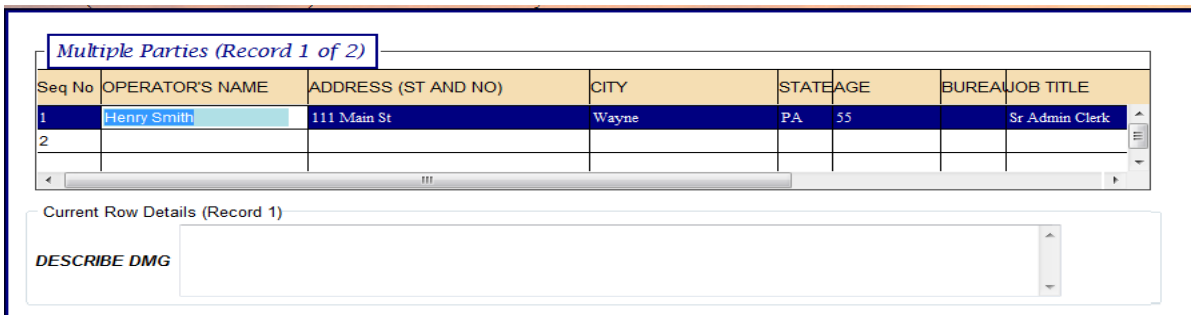
The designer can change the 'order' in which the fields display by selecting the Order field and renumbering it.

The Override Description field allows the designer to change the label/fieldname that the customer will see when filling out the form. HTML formatting can be used here as well. For example, if the label is too long, you can enter a <br> for break to split up the label into two lines.

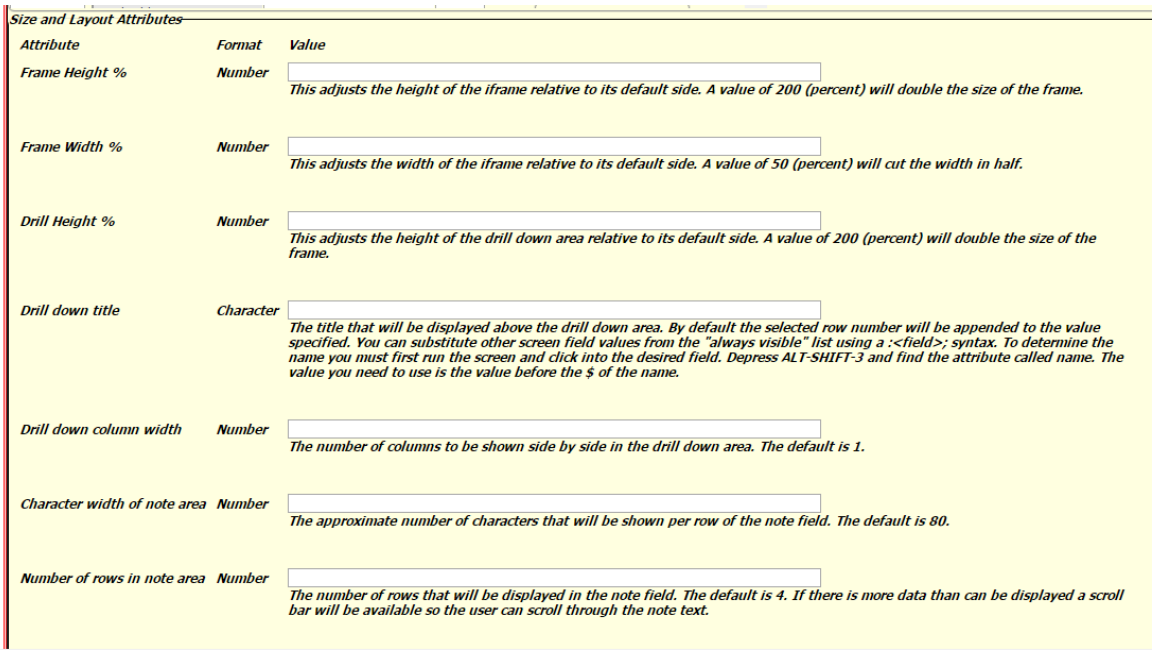
The Field Width % field will allow the designer to make the data entry space for the field smaller or longer. This is useful if the data entry is a single character, the field width can then be 10.

Always indicates that the field is to display on the form. Drill would be selected if the i- frame is too wide and you want the user to select the row and have other fields display below. This is very useful for the note field in this control. Hidden indicates that this field will not display on the final form.

Example of a note that is designated as a drill down. The user must select the row of the driver they wish to enter a note for. Otherwise, the note would be in the i-frame of this control.



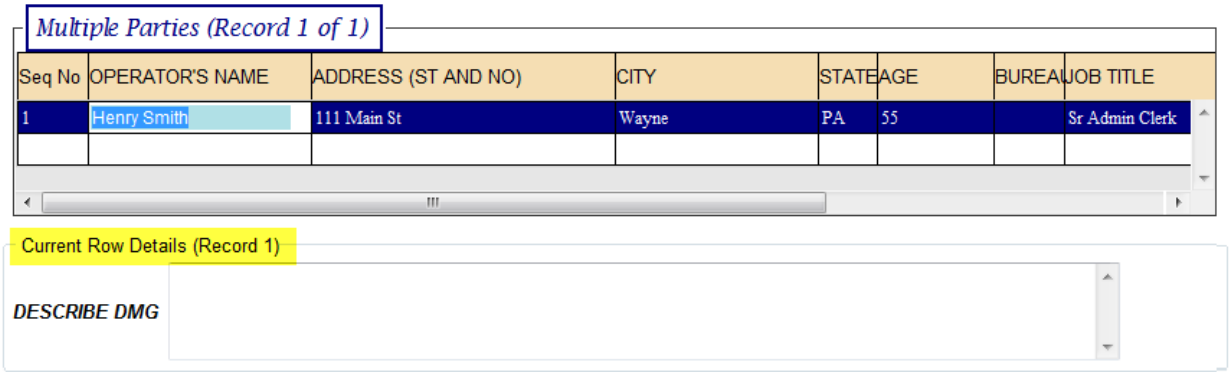
Below the i-frame of fields is a section called “Size and Layout Attributes.” As the name implies, the user can control the frame height and width, the length of the zip code and the sizing of the note. For example, if you only want the customer to enter a 5-digit zip code, then you need to enter 5 in the Maximum Zip Code Length field.



The other fields of interest pertain to the note, such as the width and number of rows to display. The note can still contain up to 444 characters, but you can design how much of that note is displayed without having to scroll.

Orientation determines where the scroll bar should reside, horizontally or vertically. Drill Down Title allows the designer to change the default heading for whatever field is designated as ‘drill’.

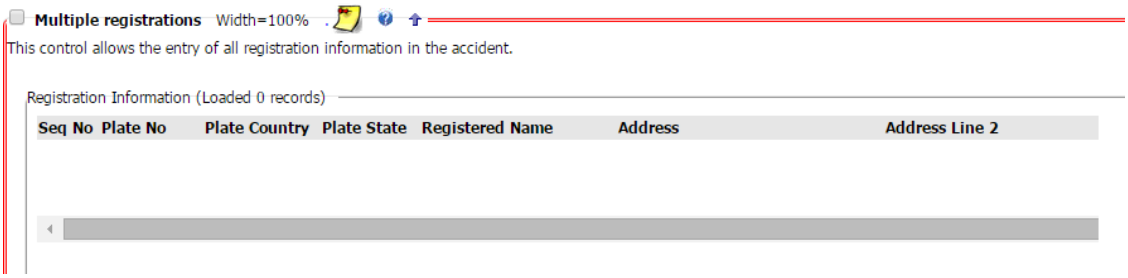
For example, if the note was designated as drill, the default section heading is:



A different title can be designated using the Drill Down Title field.

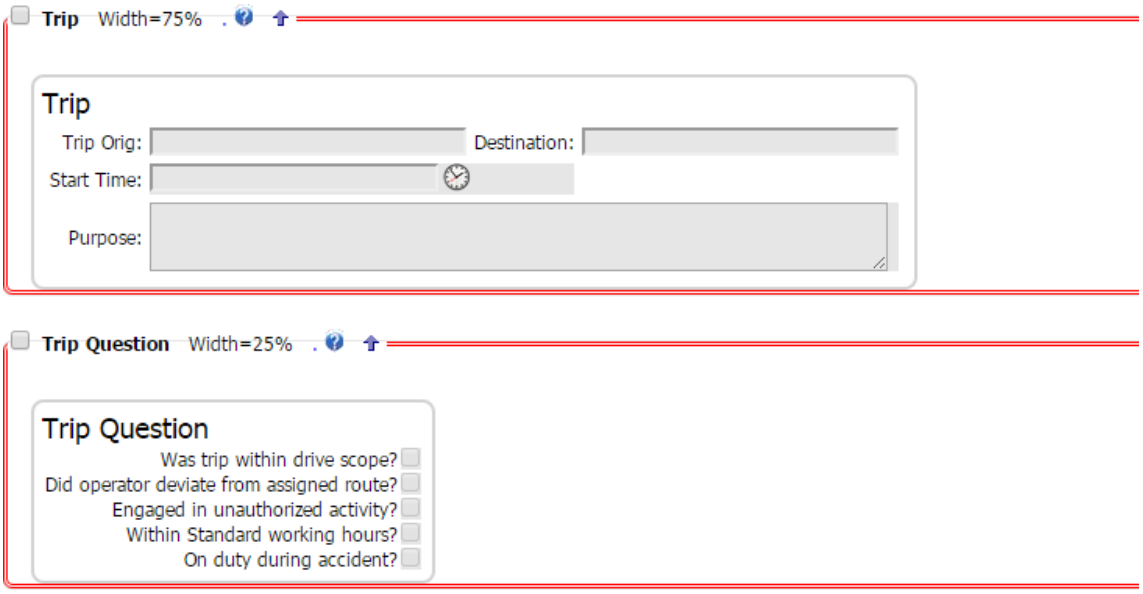
Multiple Registrations Control

In order to complement multiple drivers, a new control was created to allow for multiple registrants. This control works exactly the same as the “Multiple Parties” control.



Trip and Trip Question Controls

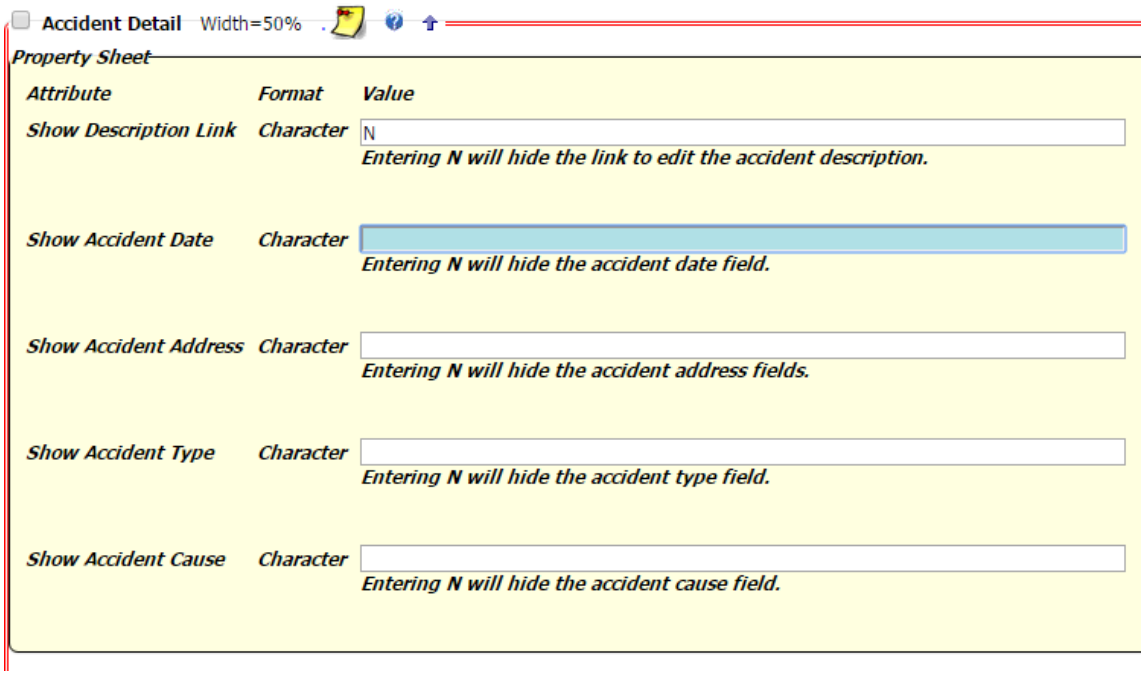
These are core controls that allow for capturing of where the driver was going, the purpose of the trip and authorization. Nothing can be changed with these 2 controls other than supplying help text.



Accident Detail Control

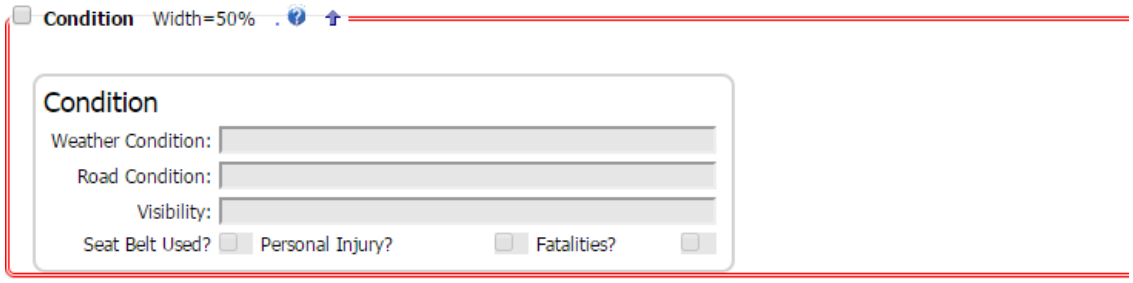
This control can be modified to remove some of the fields or the hyperlink. Select the icon.

To remove the Accident Description hyperlink, enter **N** in the Show Description Link field. To remove any of the other fields in this control, enter **N**.



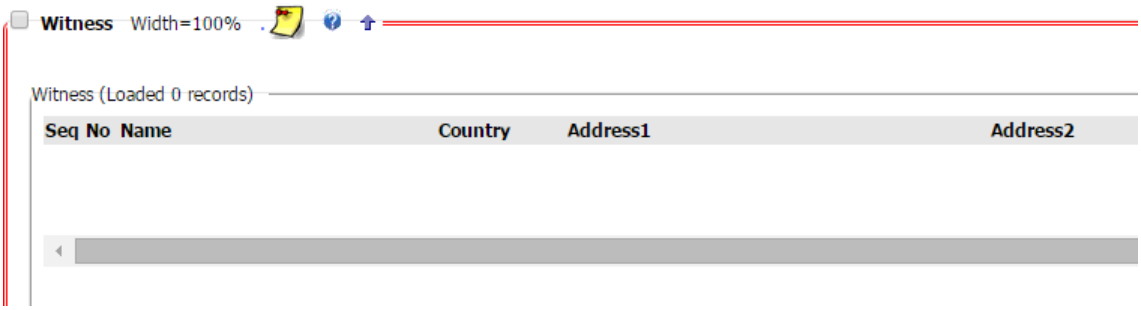
Condition Control

This control only allows for entry of help text. If there are not enough conditions that are needed, you can create accident items and not use this control.



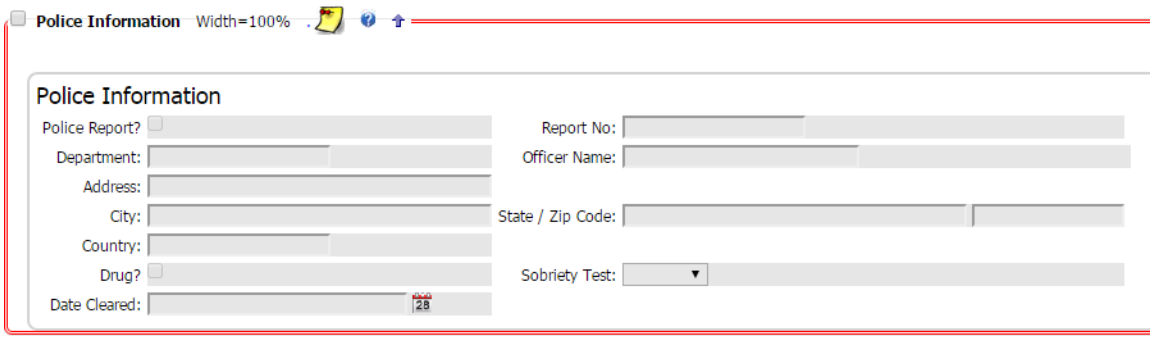
Witness Control

Enhancements have been made to this control as of v3.0. Additional fields have been added as well as designating if the person was a witness, injured or passenger. The use of this control is the same as Multiple Parties



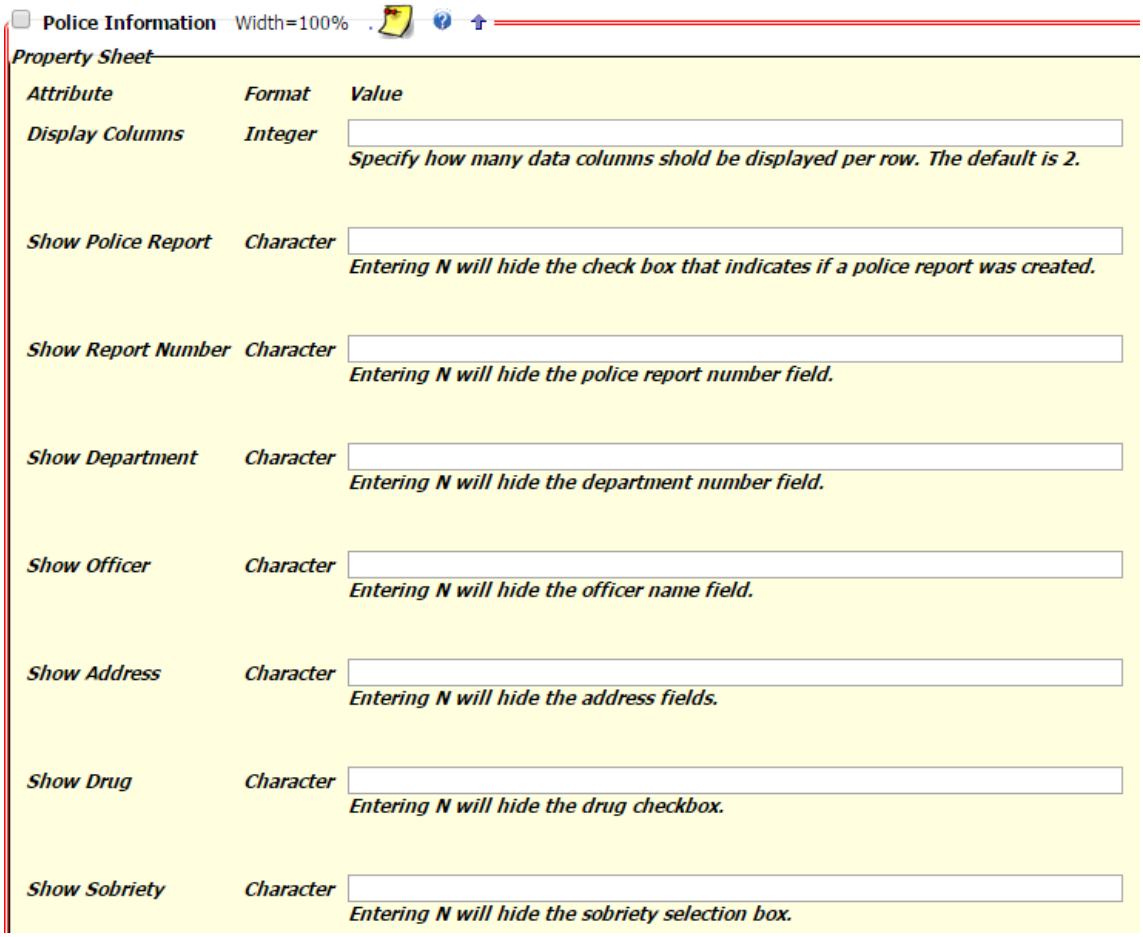
Police Information Control

The Police Information control is used to capture if there was a police report filed and information pertaining to the police officer.

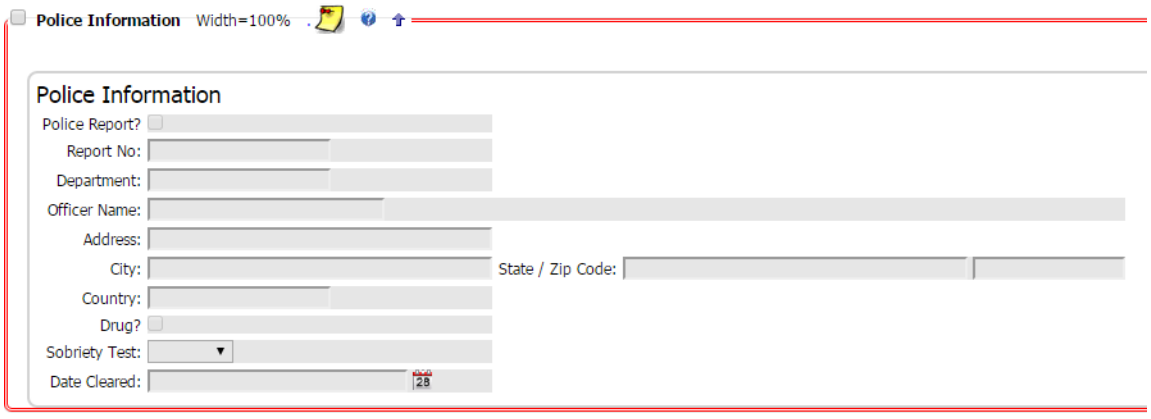


If some of the fields are not needed, select the icon. Display Columns allows the designer to control the number of fields per row. Two is the default and is also the greatest number of columns per row that can be used. So the only choice is to enter one.

If a particular field is not needed, enter **N** in the appropriate field.

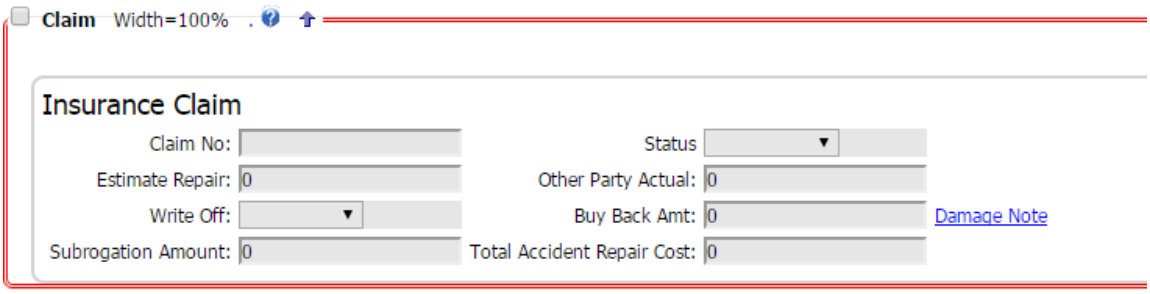


Default example is shown above. Below is an example, if changed to **1.**



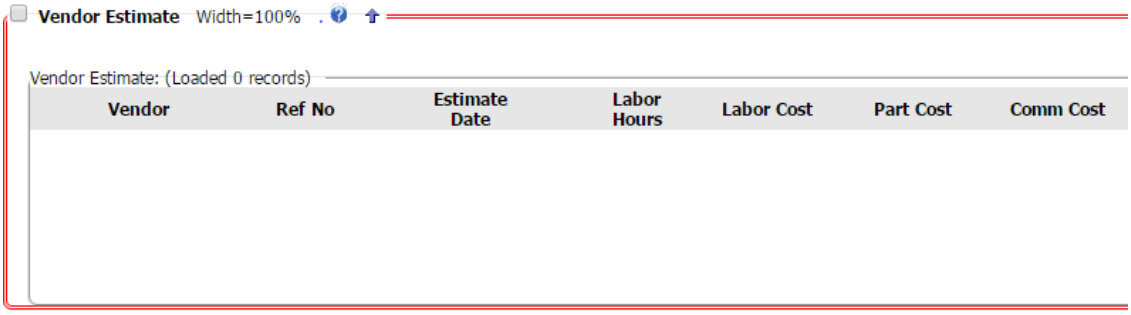
Claim Control

This control gathers information pertaining to the insurance claim and the status of the claim. The only change here is the ability to enter help text. Don't forget Translation Maintenance if you want to change field names. Even the different statuses can be changed using Translation Maintenance.



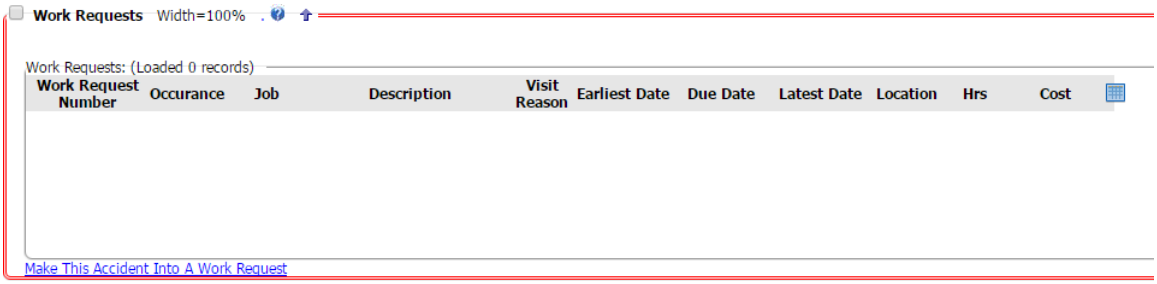
Vendor Estimate Control

This control will allow the customer to track as many vendor estimates pertaining to their accident as needed. This is informational only. Only help text can be added.



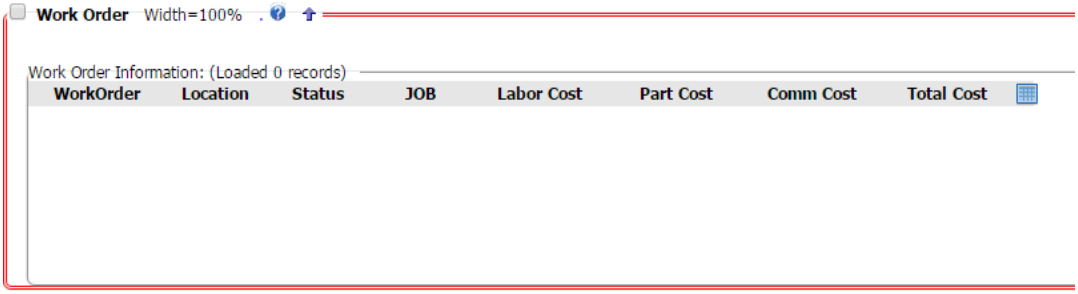
Work Requests Control

This control allows the customer to create a work request right from the accident form. By selecting the Make This Accident into a Work Request hyperlink, Work Request Main will display. After the work request is saved, it will display in the i-frame with the Work Request Number as a hyperlink. Only help text can be added.



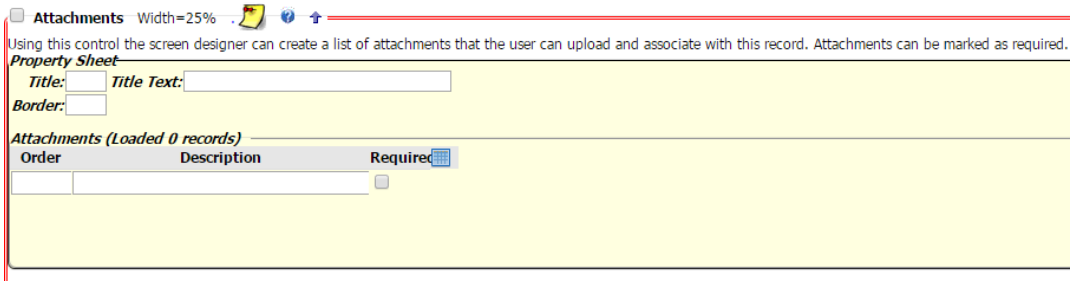
Work Orders Control

Depending on how accident system flags are configured, determines whether any pertinent work orders automatically display on the form. Only help text can be added.



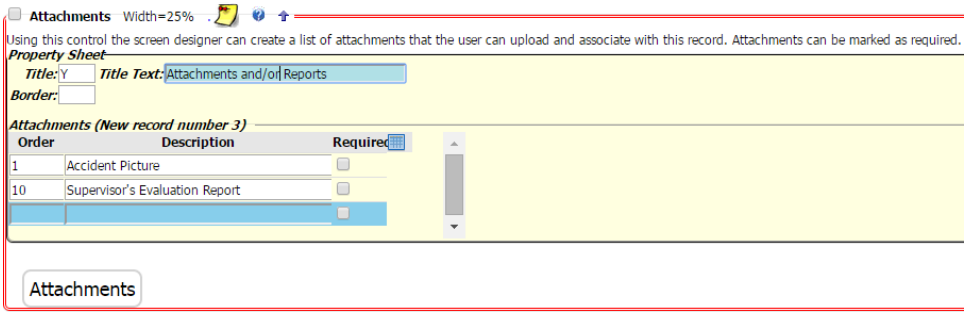
Attachments Control

Rather than use the Attachment icon, the designer can title what attachments are needed or required. For example, the attachment title could be 'accident picture #1' and then another attachment named 'accident picture #2'. Select the icon.



If you want to give this section a title on the form, enter **Y** in the Title field and proceed to give it a title 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 what 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 Required checkbox.



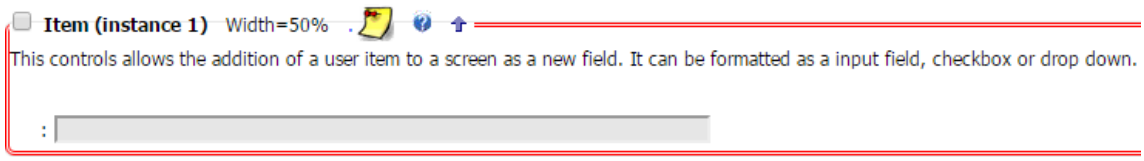
Here is what the customer will see on the form.

The person filling out the form would select the word, New and proceed to browse for the attachment. Below is what the form looks like after an attachment has been associated.

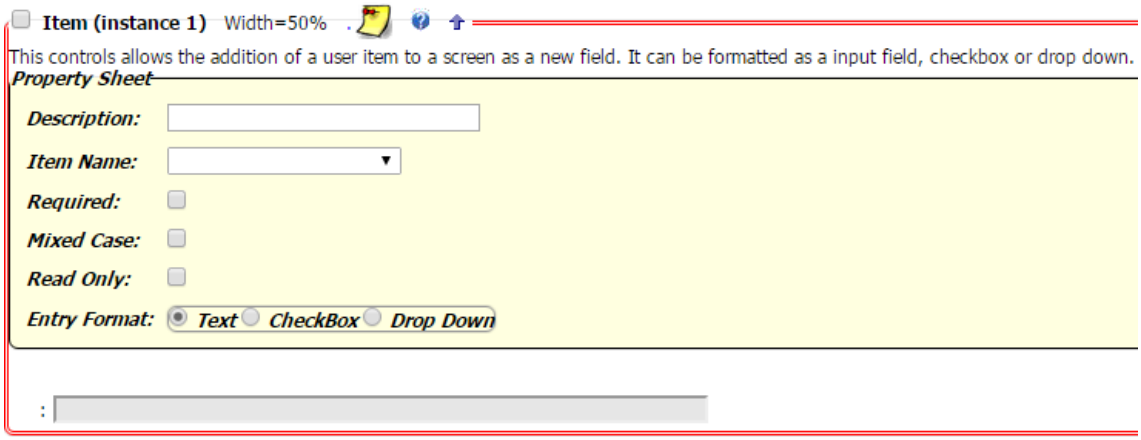
By selecting View, the attachment will display.

Item (instance 1) Control

There are up to 12 'item' controls that can be used. The Item Instance allows for a single field to be displayed on the form. These single fields would be 'accident' items. This is useful if only one field is needed between two controls.



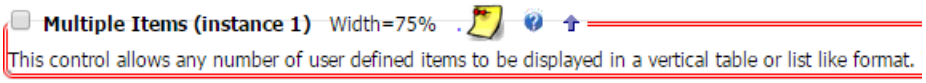
Select the icon.



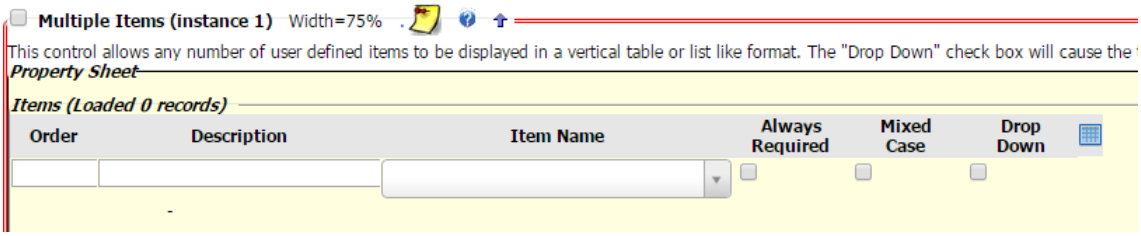
1. The Description is the field name displayed on the form. It is case sensitive.
2. Item Name is the corresponding accident item.
3. If a response is required, select the Required box.
4. Select Mixed Case if the person filling out the form can enter upper and lowercase; otherwise, the default is all data entry will be in upper case.
5. Select the type of Entry Format. Will the user be entering free-form text? Should a checkbox display for the user to select or do you want a dropdown box so the user can choose the correct value? If 'CheckBox' is selected, you will be asked for the Checked Value; meaning, if the checkbox is selected, what does that mean? Yes or No, for example.

Multiple Items (instance 1) Control

Multiple items are used when you need to group several 'accident' items together on a form. There are up to five multiple item controls.



Select the icon

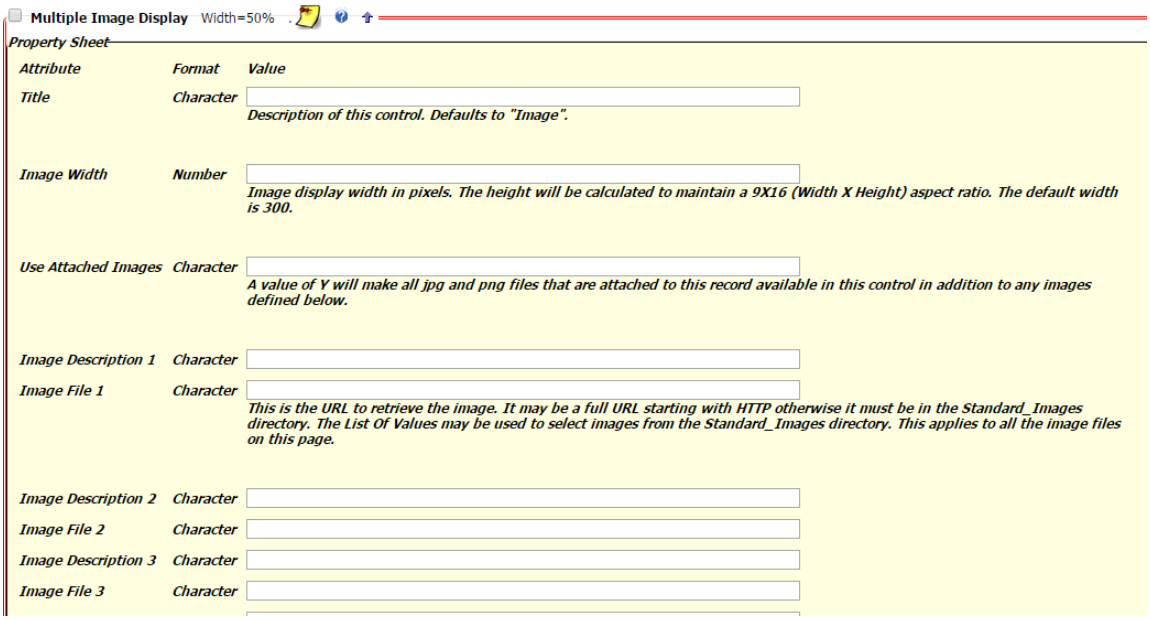


1. Enter the Order in which you want the item to display.
2. Enter the Description, which is the field name displayed on the form. It is case sensitive.
3. Select from the dropdown, the 'accident' item that corresponds with the description in the Item Name field.
4. If a response is always required, select the Always Required checkbox. If the customer can enter text in upper and lower case, select the Mixed Case checkbox. If the accident item has a list of values and you want it displayed as a dropdown box, select the Drop Down checkbox; otherwise, the customer can double-click in the field.

Multiple Image Display Control

This control allows up to eight images that can be displayed for the customer to designate on the image where the damage occurred. The static images are in a directory called /controls/common/standard_images. At the current time, Microsoft Silverlite is required to run this control. If you are going to use this control, then you will also need the Image Detail control as this control will allow the user to document the damage.

Select the icon.

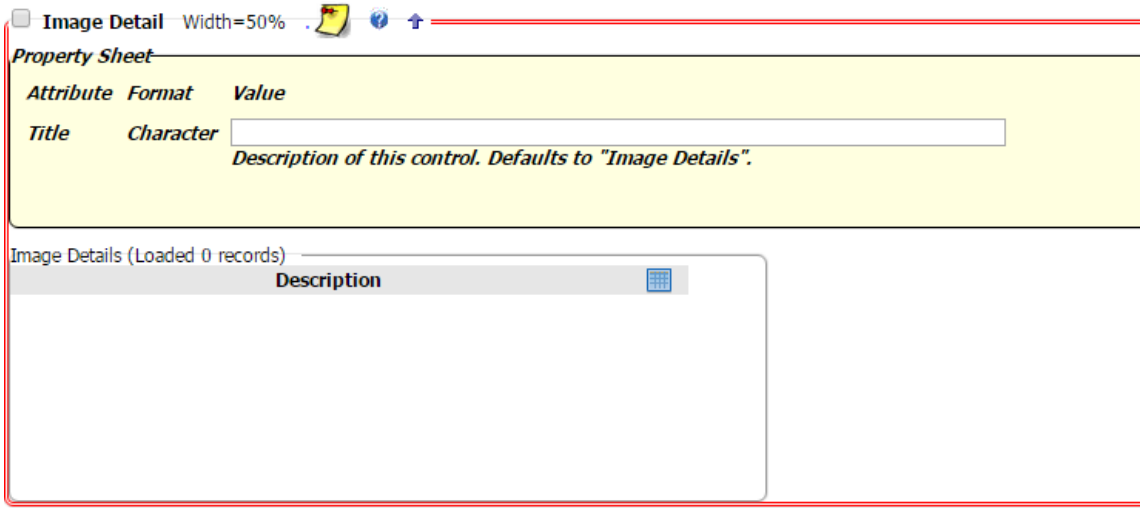


The important fields here are the Image Descriptions and the Image Files as these fields contain the 'title' the user will see and the url of where the file/image is respectively. The user can double-click in the Image File field to select the image.

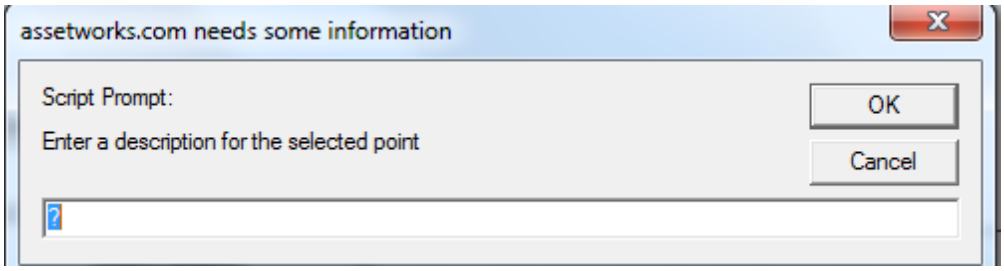
Use Attached Images allows the user to attach a picture which will then be utilized as an image, if this is set to **Y**.

Image Detail Control

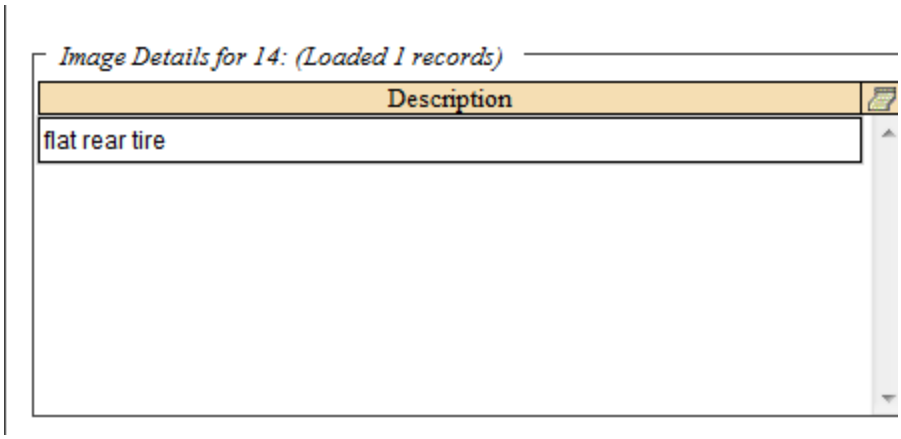
The Image Detail i-frame is where the description of the damage will reside. If you want to change the title of the details or need help text, you can do so here.



When the user selects the image, the following box displays for the user to enter a description of the damage.



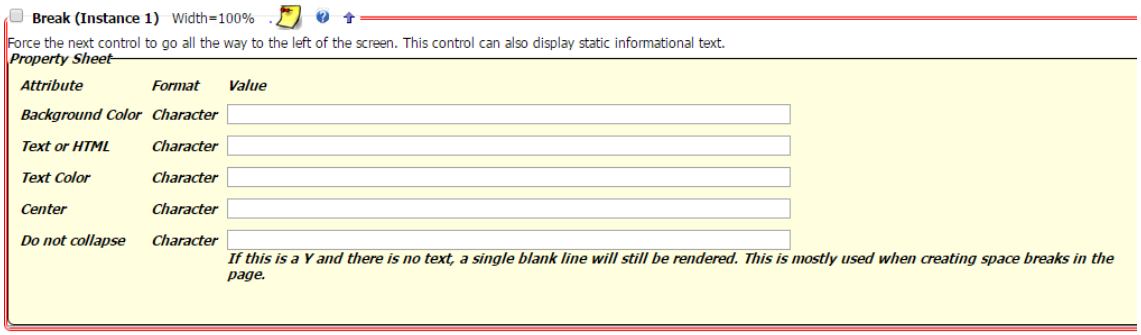
After the description is entered, the Image Details will contain the damage note.



The user will be able to select the damage description and the image will display showing where the damage is indicated by the paper with a tack in it.

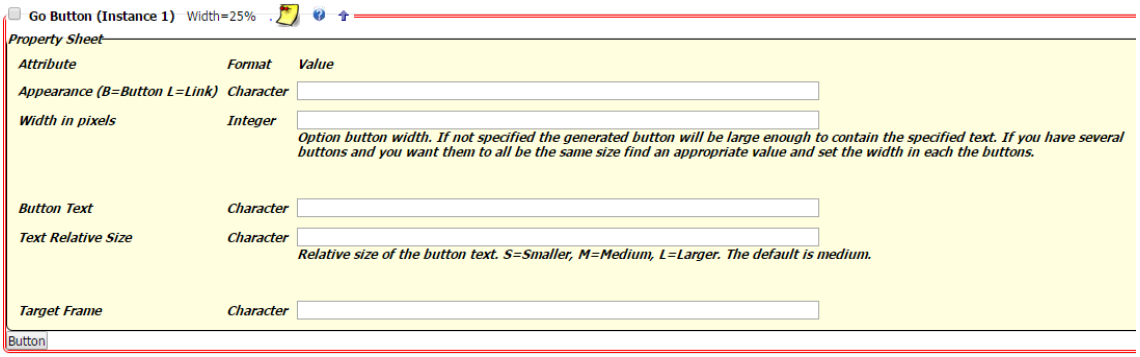
Break Instance (1-9) Control

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 (1-6) Control

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.

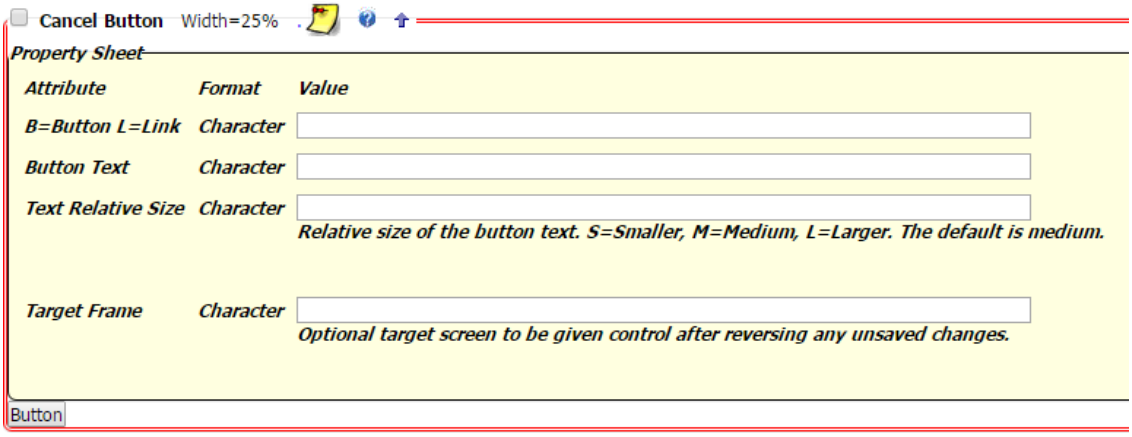


1. Indicate if you want a button or a link to display by using the Appearance field.
2. Enter the text the user will see in the Button Text field.
3. Double-click in the Target Frame field to select the frame/report the user will be taken to when selecting the button or link.

Cancel Button Control

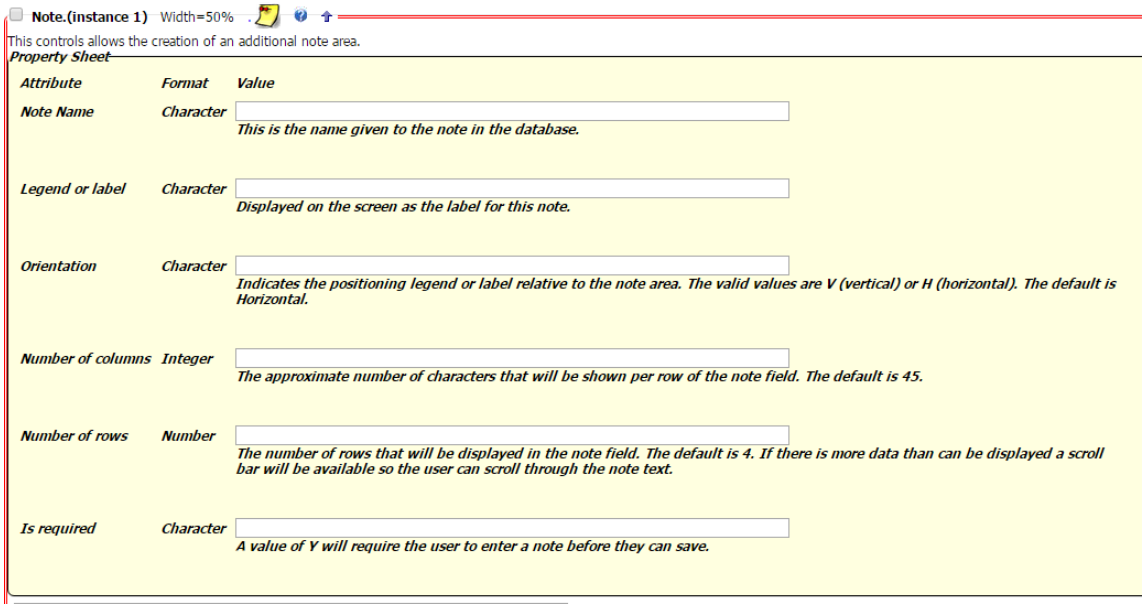
The Cancel Button control allows for the user to select the button and not save whatever changes were just made. It is similar to the Undo All Changes icon except that the designer will need to designate what frame the user is taken to after they select the 'Cancel' button.

In this example, when the user selects the Cancel button, they will be directed to their Home Page.



Note Instance (1 thru 6) Control

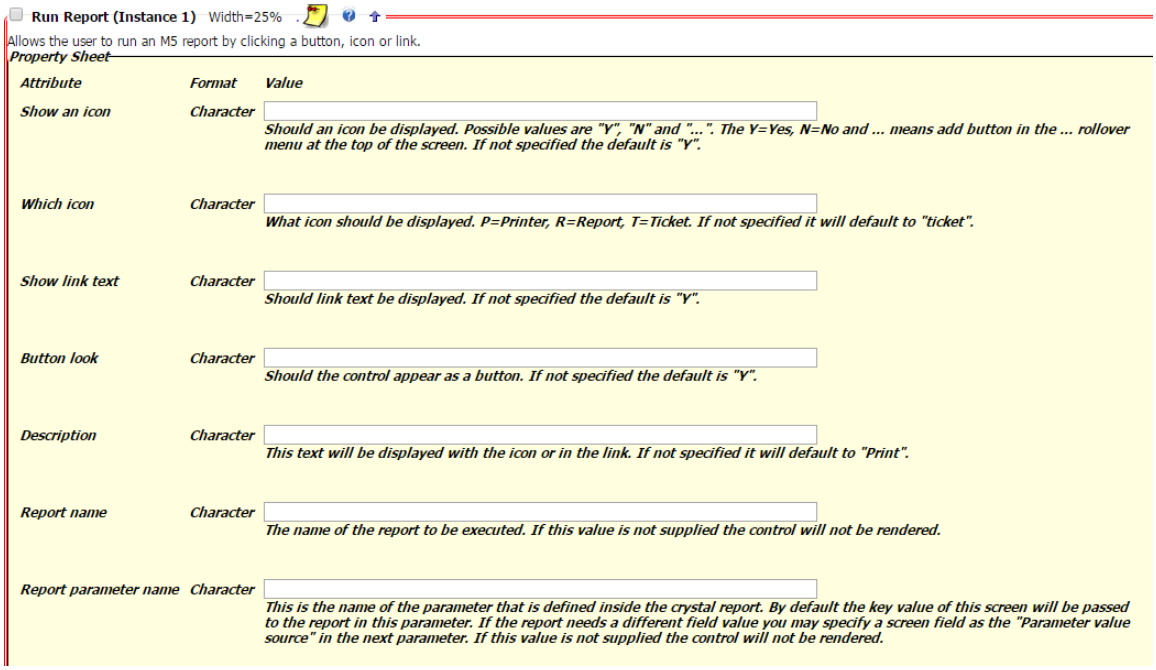
Up to six additional notes can be added to the form. These notes are separate from the 'accident' and 'damage' note hyperlinks. Notice below the control, the designer can view what the form will look like for this control without going to Preview.



1. Note Name is important as this is the name of the note in the database.
2. Enter what you want the user to see as the label in the Legend or Label field.
3. Orientation indicates how the label should be displayed.
4. Number of columns and Number of Rows indicates how much data the user should be able to view on the form without scrolling.
5. If the note is required entry, enter **Y** in the Is Required field.

Run Report Control

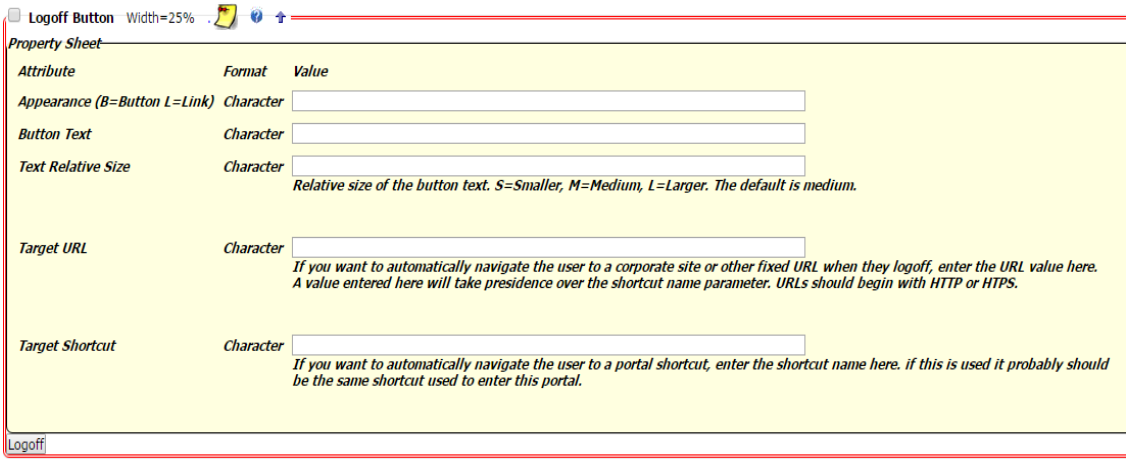
This allows for a button or link to display that the user can select to run a report. Up to two reports can be designed.



1. If Show an Icon is set to **Y**, then an icon that looks like a report displays on the button.
2. If you want the user to select a hyperlink, enter **Y** in the Show link text field.
3. If you want the user to select a button, enter **Y** in the Button look field. If a button is selected, you must enter text in the Show link text field; otherwise, the button is blank.
4. Description is what the user will see as the text. This is usually the name of the report.
5. Double-click in the Report name field to select the url of the report to be generated.
6. A Report parameter name must be entered in order for the report to run. This is usually the primary key.
7. Enter the Destination of where the report should go. If the user should be able to choose the In-bin or Email, select **C.** If 'email' is selected, the user must have a valid email address associated to their login (Application User Maintenance).
8. If Show email address is set to **Y** then the user's email address will display as a tool tip when selecting the button. If the user selects 'email', then the report goes directly to their email address. There is not pop-up asking for which email address.

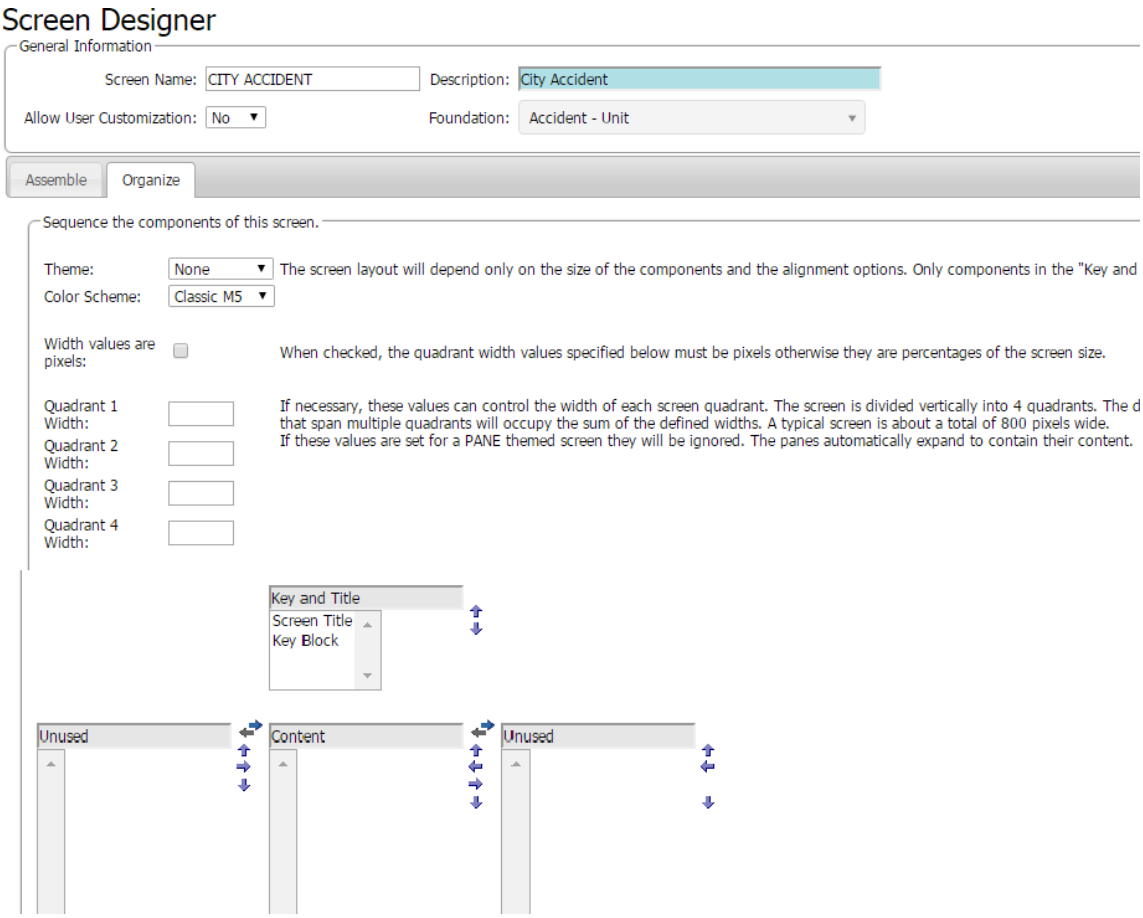
Logoff Button Control

The 'Logoff Button' is yet another button the designer can use to direct the user to another webpage or portal.



Organize Tab

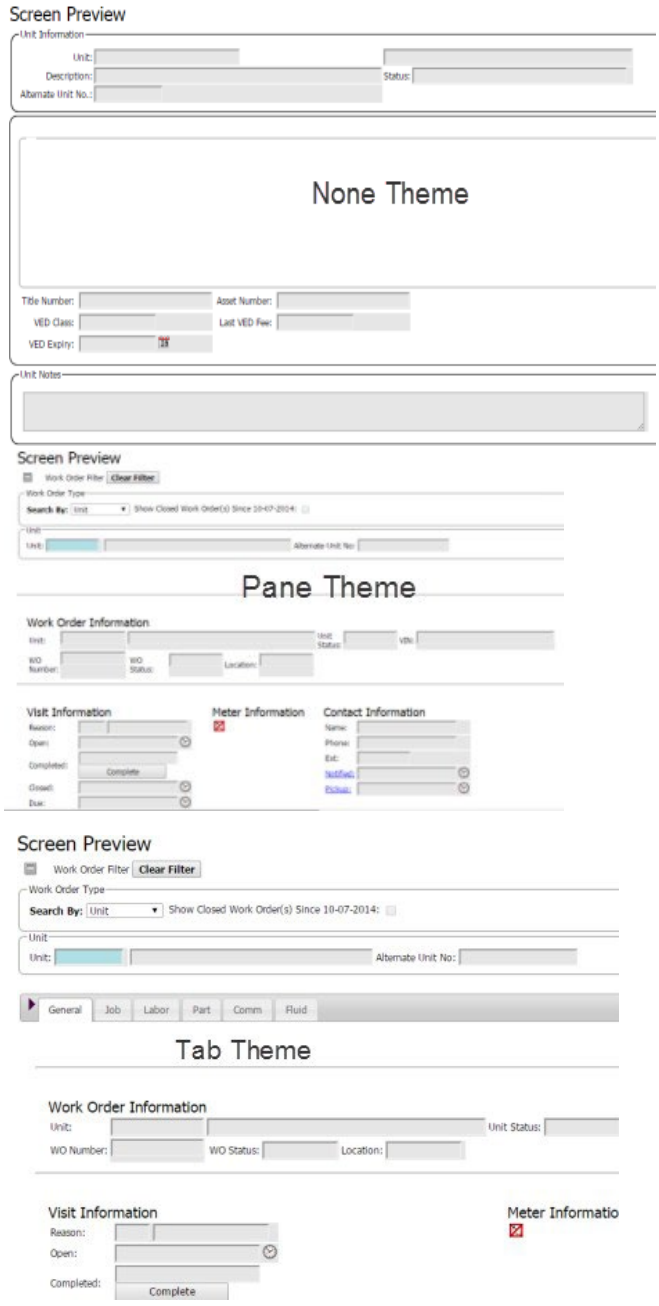
The next step in the screen design process is to organize the frame or sequence the User Controls when displaying this frame to the users. Select the Organize tab.

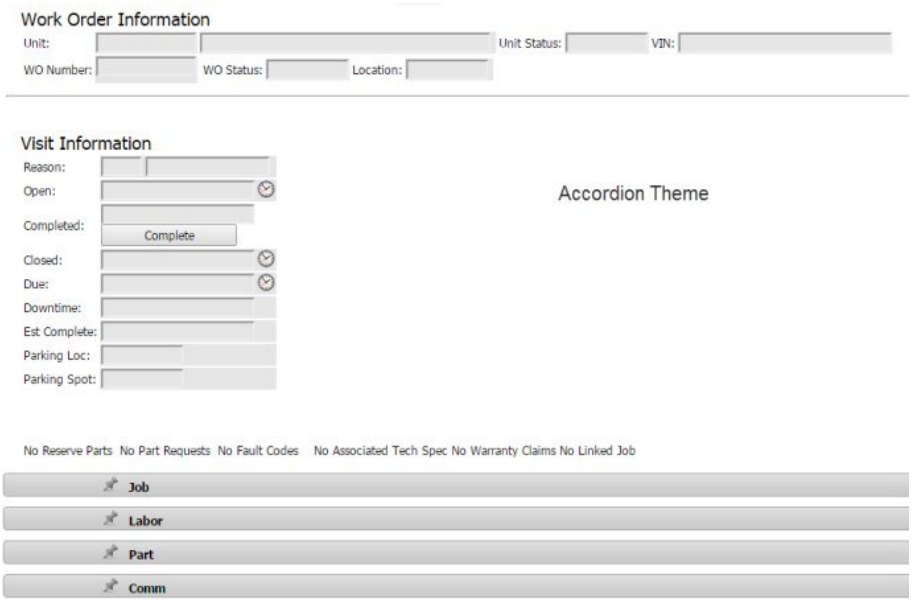


Theme Pane

The Theme Pane is used to determine how the User Controls are presented on the frame. The options are:

None: All selected User Controls will display on one page.
Pane: Displays each user 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 row.



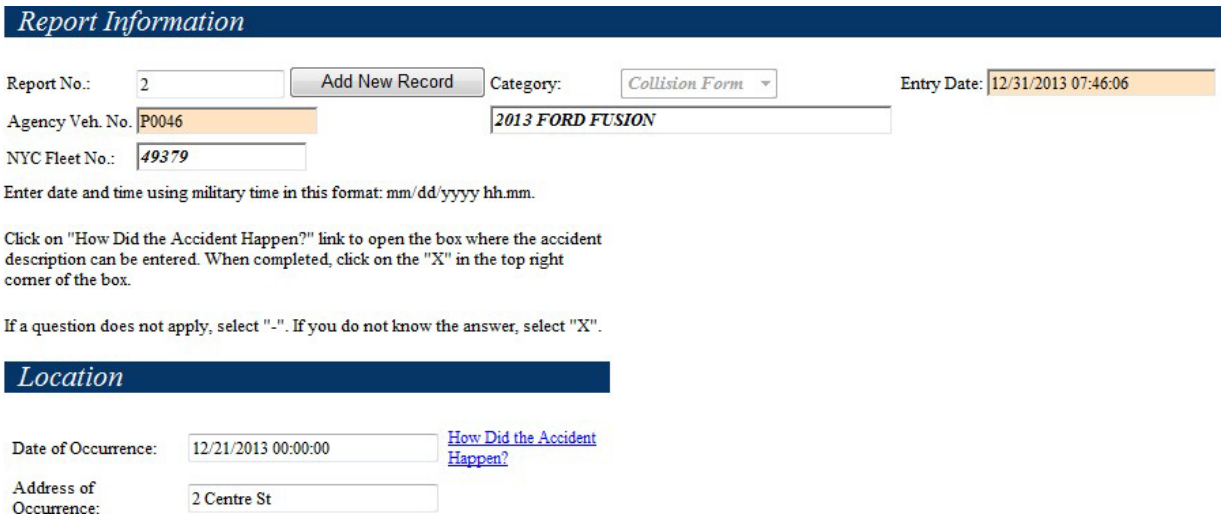


Color Scheme

There are only two options:

Classic M5: Retains the color of M5.

Portal: Displays a color border for each control as shown below.



Control Arrangement

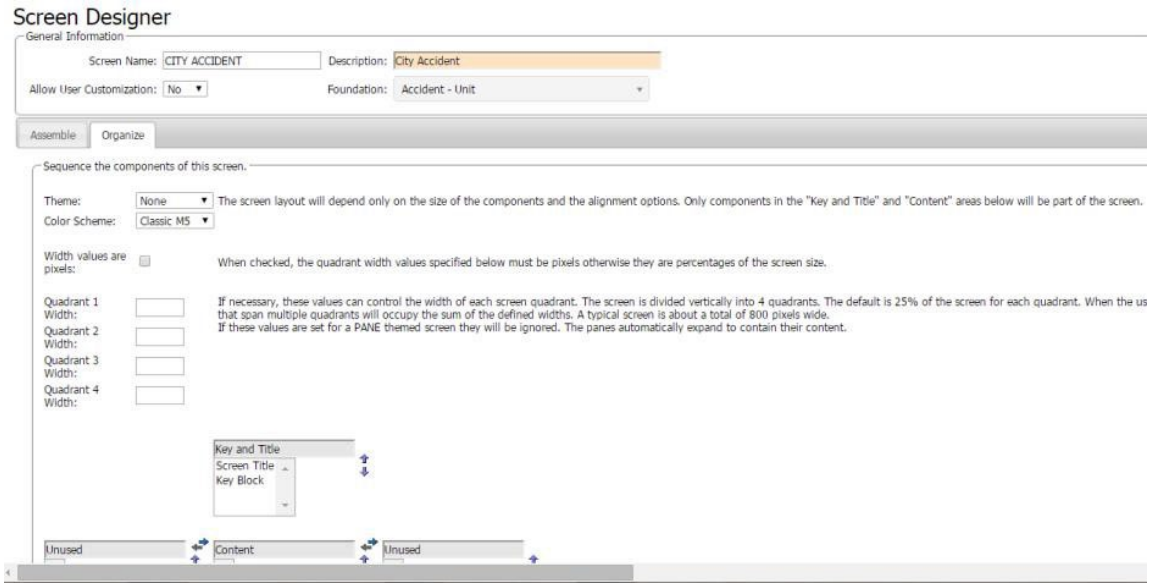
The Key and Title not are re-sequenced on any pane.

Each User Control has a defined width. It defined in frame quarters. If the next User Control does not fit, it is forced down and to the left.

Some controls can only be placed at the top of the frame such as the Key Block User 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

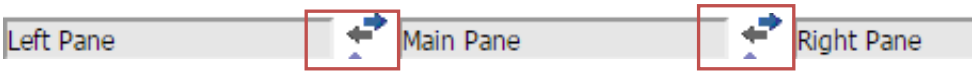
The frame layout will depend only on the size of the components and the alignment options.



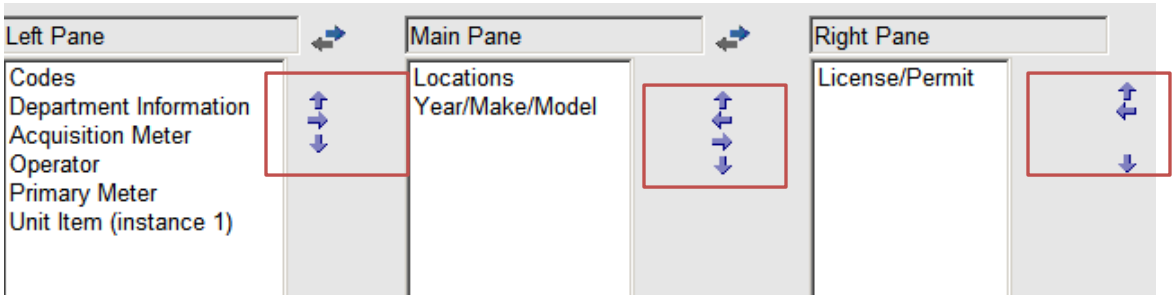
Pane Theme

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.

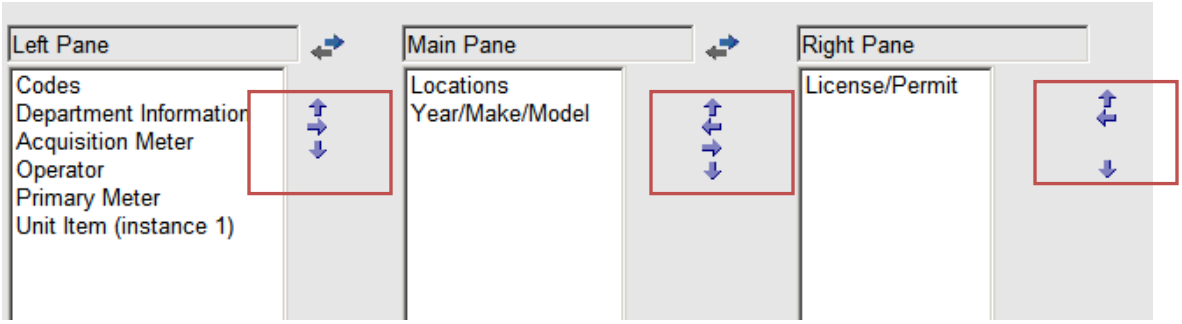
The left and right directional arrows permit the designer to move the panes from their current location to another one. This is also referred to as a Pane Swapper. This only makes sense if the pane contains data that is narrow when displayed.
Hovering the mouse over the directional arrows will also provide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



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

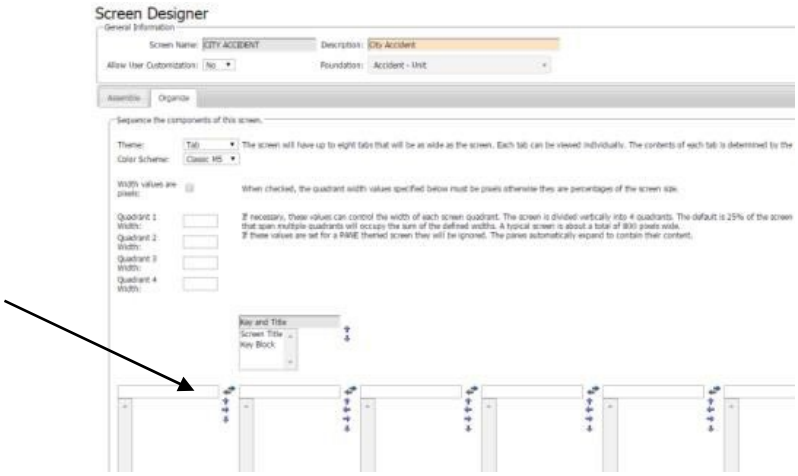


The up and down directional arrows permit the designer to move or re-sequence the User Controls within a pane.

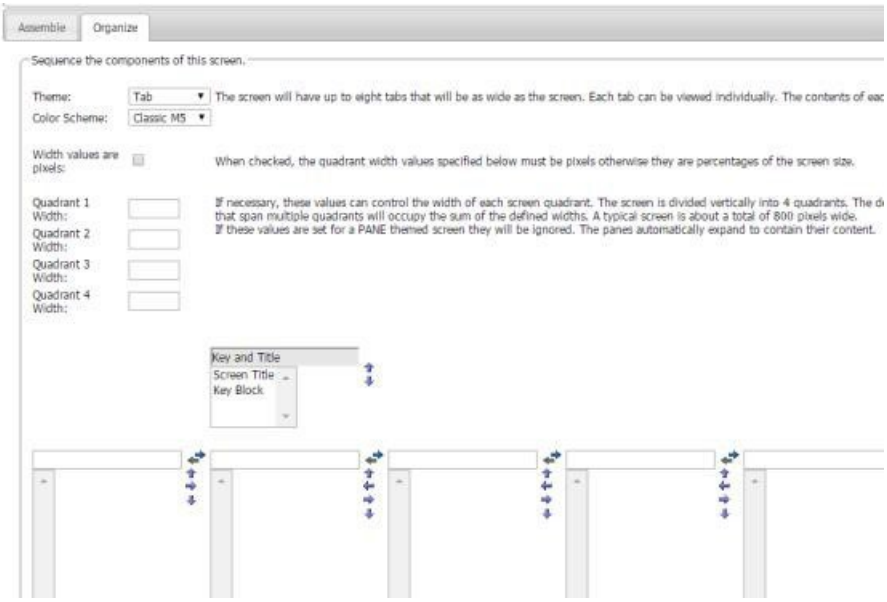


Tab Theme

This is the traditional M5 tab layout. A frame may 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 user controls in the second tab. There must be at least one user 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.

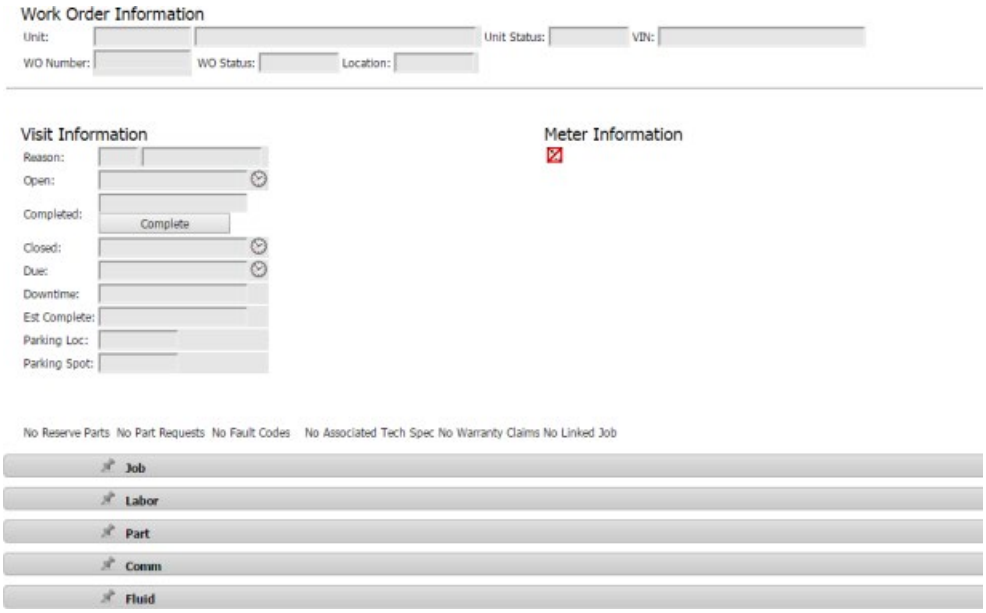


The up and down directional arrows allows for re-sequencing of data within the Tab as well as moving the User Controls from one tab section to another one using the right and left directional arrows.



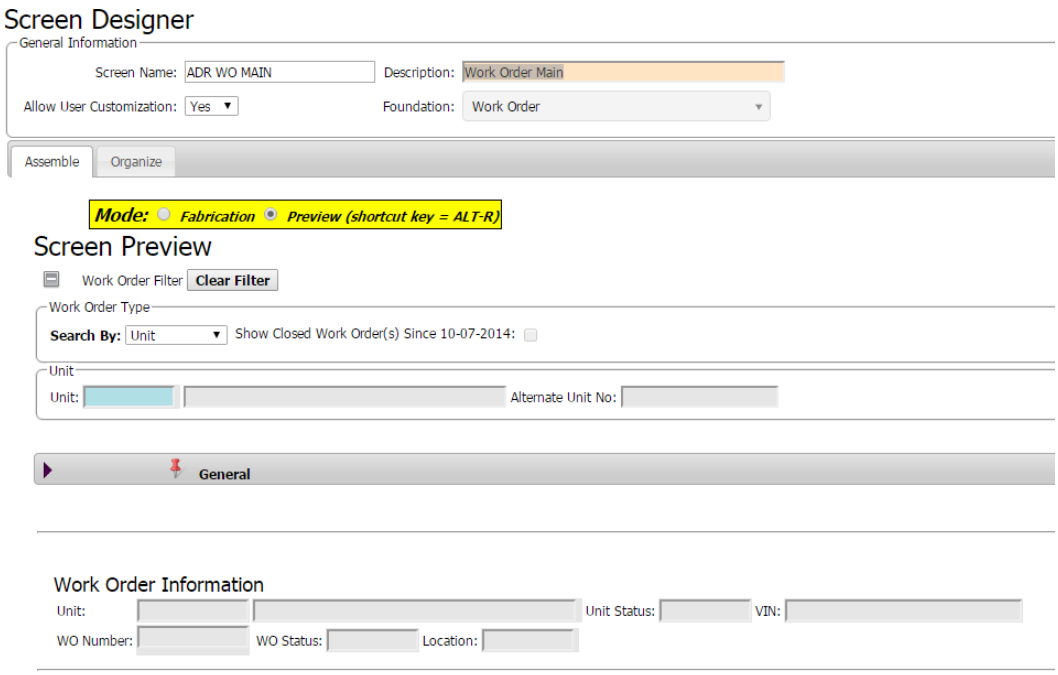
Accordion Theme

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.



Preview Mode

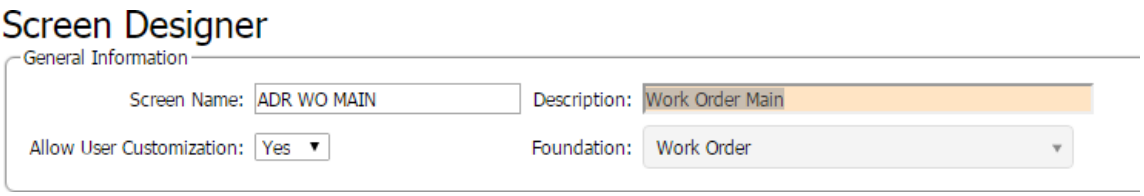
When the frame designed is finished use the radio button to use the Preview Mode.



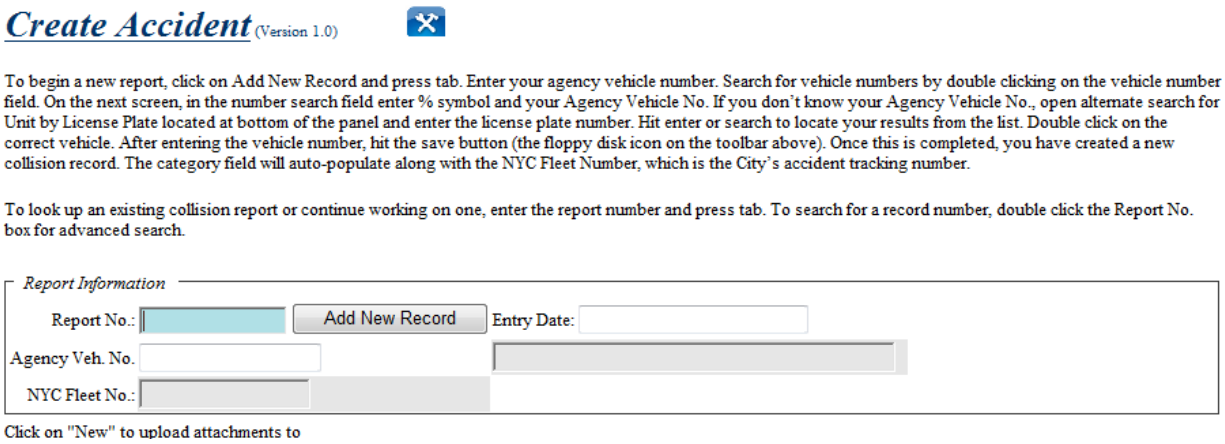
The final step is to select the SAVE icon.

User Customization

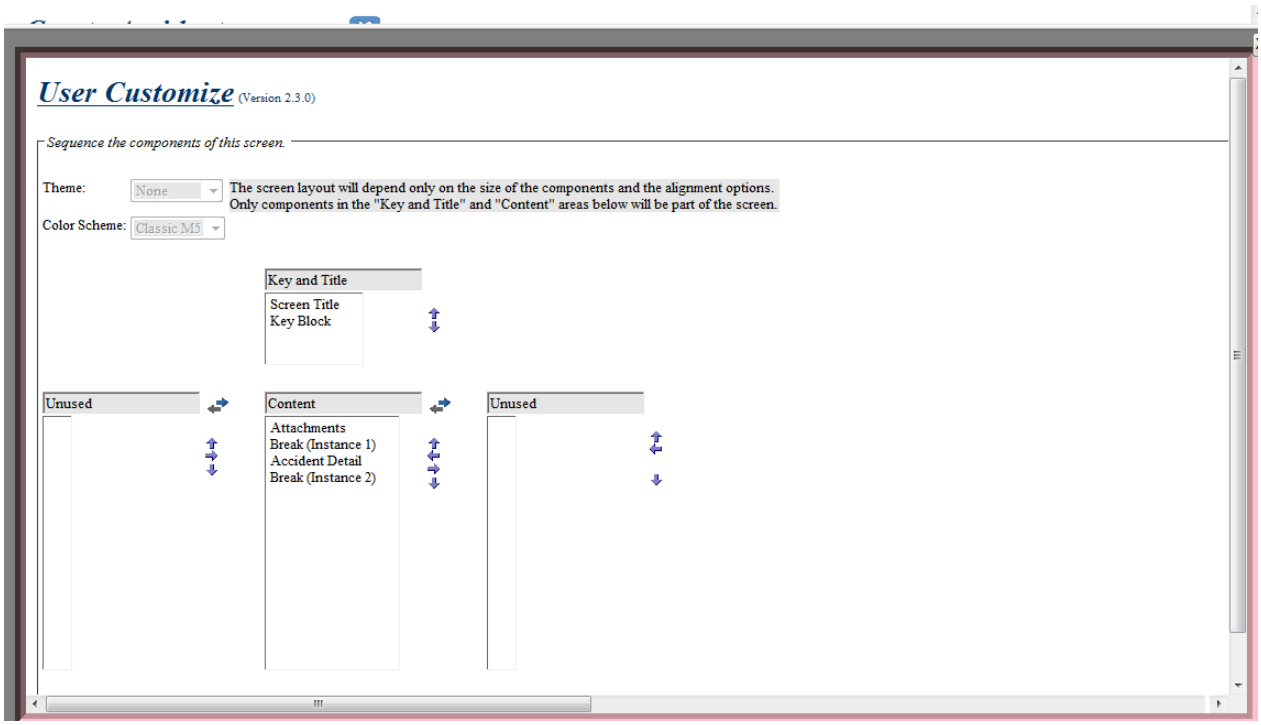
To allow the role to make frame layout changes only, change the Allow User Customization to **Yes** as shown below.



If the role has the frame on their menu, then this icon appears on the top of the frame as shown below:



When the user selects the tool icon, the following frame appears. The user can customize the frame layout only.



The user cannot change the screen's theme nor can they add or remove User Controls. They can rearrange the User Controls on the frame. If the frame has a Tab theme, the user can create new tabs, can rearrange the tabs, can re-sequence the data within the tab and even change tab headings.

Published Frames Changes Considerations

After a frame has been customized by a user, the published version (version created in Screen Designer) can still be changed. Please note if:

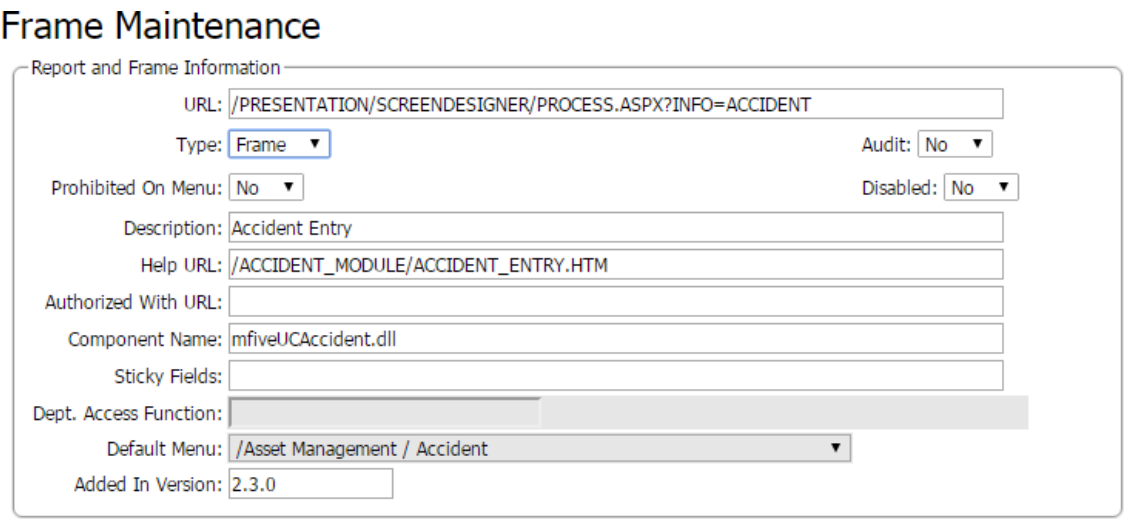
- If a User Control is deleted, the User Control is deleted from all user customized versions.
- Moving a User Control on a frame will have no impact on user customized frames.
- However, adding a User Control to the frame will delete all user versions and they will revert back to the published version.

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.

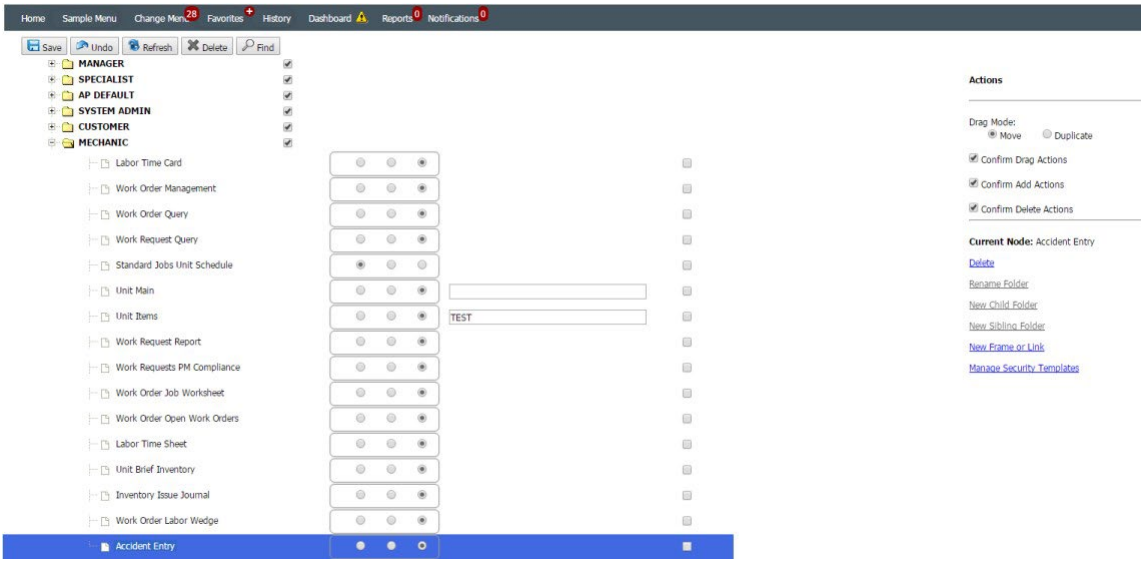
Frame Maintenance

What is important here is that if the designer created multiple pages, then each page needs to be brought up in Frame Maintenance and the field, Authorized with URL must be set to 'Public'. Otherwise, the remaining pages (other than page 1) will not display when the user selects the various buttons.



Menu Maintenance

The new frame must be added to the intended menu so it can be accessed. The menu is assigned by using Role Maintenance. Security templates can be applied to screen designer frames.

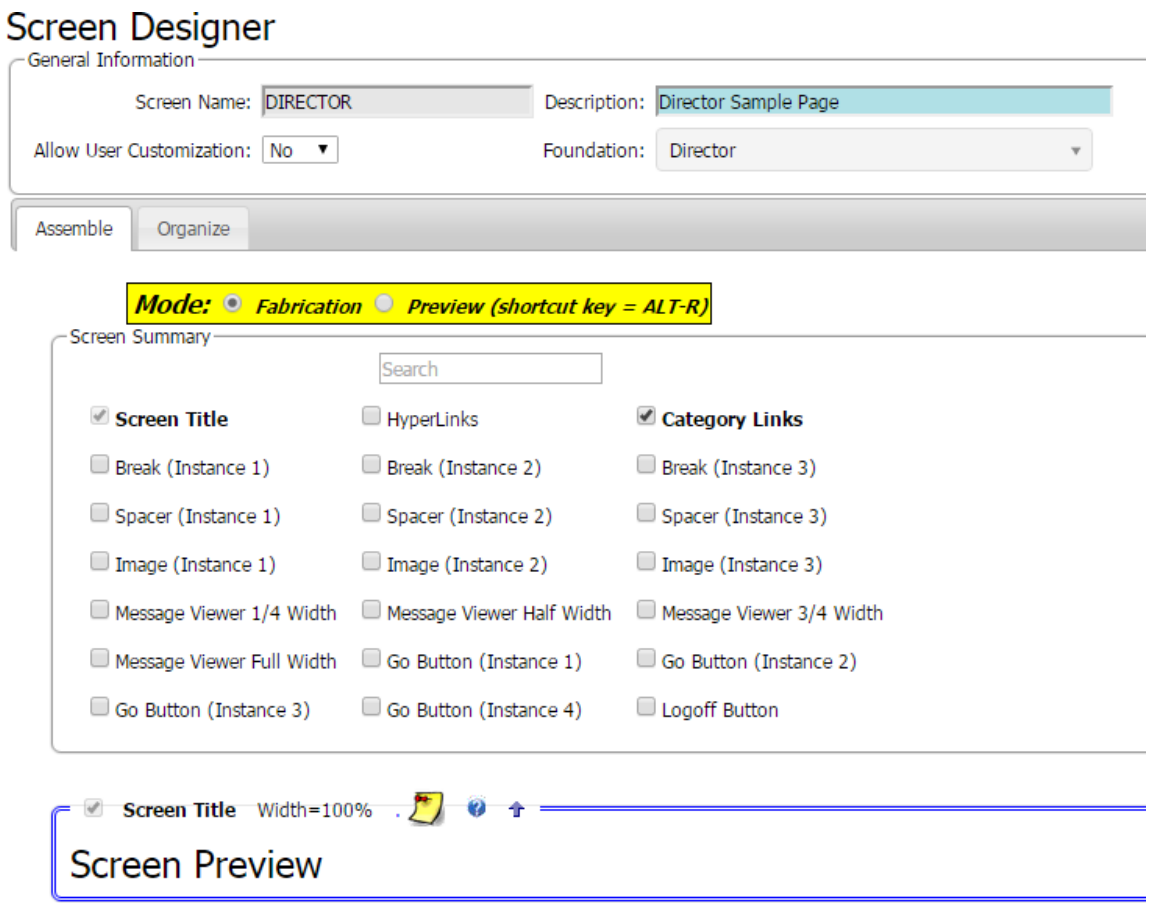

Home
Sample Menu
Change Menu
Favorites
History
Dashboard
Reports
Notifications
Save
Undo
Refresh
Delete
Find
MANAGER
SPECIALIST
AP DEFAULT
SYSTEM ADMIN
CUSTOMER
MECHANIC
Labor Time Card
Work Order Management
Work Order Query
Work Request Query
Standard Jobs Unit Schedule
Unit Main
Unit Items
TEST
Work Request Report
Work Requests PM Compliance
Work Order Job Worksheet
Work Order Open Work Orders
Labor Time Sheet
Unit Brief Inventory
Inventory Issue Journal
Work Order Labor Wedge
Accident Entry
Actions
Drag Mode:
Move
Duplicate
Confirm Drag Actions
Confirm Add Actions
Confirm Delete Actions
Current Node: Accident Entry
Delete
Rename Folder
New Child Folder
New Sibling Folder
New Frame or Link
Manage Security Templates

Appendix A

Creating a Director Page

A 'director' page is a form the designer can create to allow the user to select various buttons to go to various forms. In order to use the 'Director' foundation, accident categories need to be created as described earlier in this document.

The only controls needed are: Screen Title and Category Links unless the designer wants to create a button to go to the user's Home Page or Logoff.



Screen Title

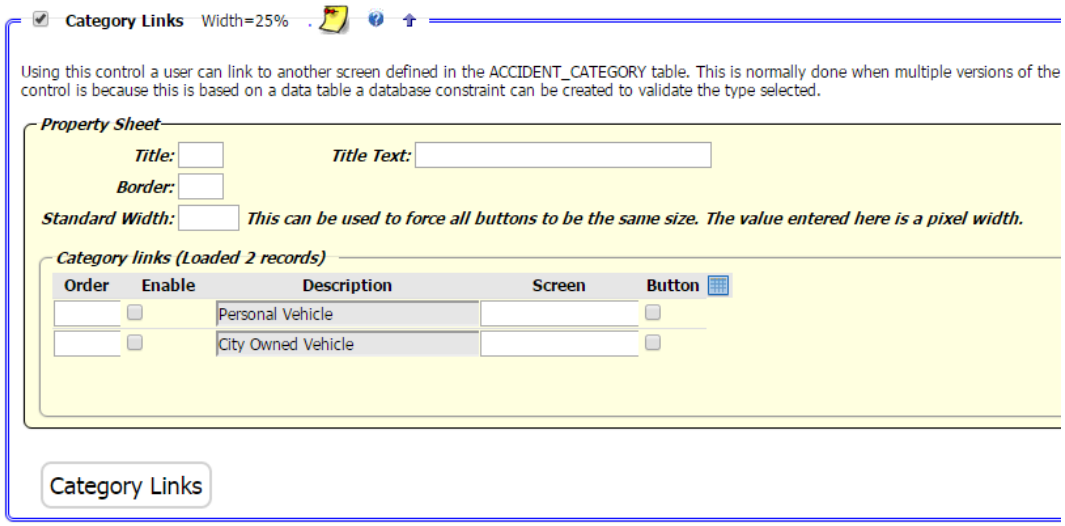
This control is the very same as it is for all foundations. Please refer to the *Screen Title* control section described earlier in the document.

Category Links

This control allows the designer to create the buttons for the user to see. All accident categories will display and the designer will enable only those categories that buttons need to be created for. Help text can be added.

After the director page is created, only this screen designer form needs to be on the user's menu, not the 'called screens'. Using the example below, if Violation and Theft were selected, those two screens do not need to be on the menu, just the 'director' page needs to be on the menu.

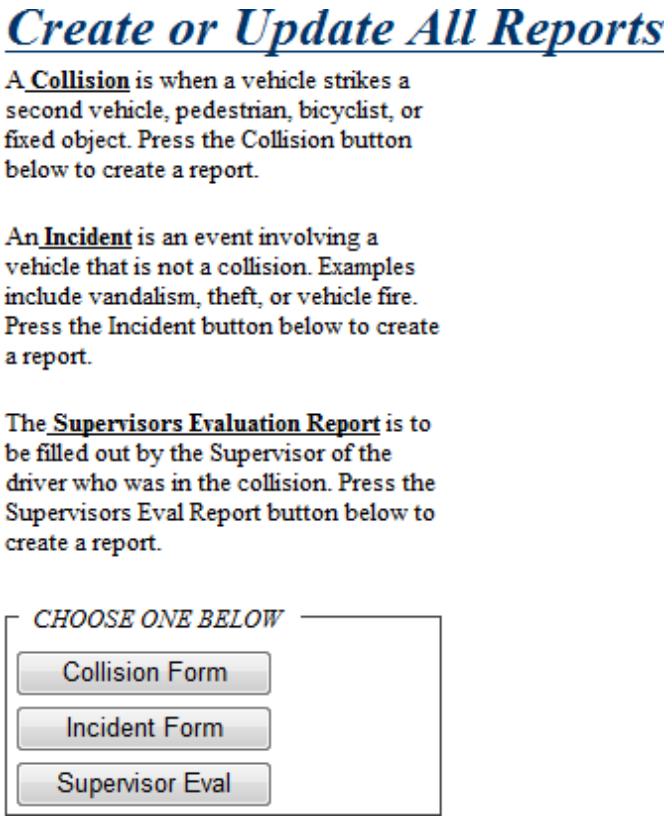
Select the icon.



1. Enter **Y** in the Title field to create a new title for the director page.
2. Enter the description the user will see on the director page in Title Text.
3. If you want a border around the director page, enter **Y** in the Border field.
4. Enter a pixel size in the Standard Width field to make each button the same size.
5. Enter the order in which you want the user to see the buttons in the Order field. There is no skipping of numbers in this instance, so the designer will need to enter as 1, 2, 3 and so forth.
6. Select the Enable checkbox if this is a button you want on your page for the description shown.
7. Double-click in the Screen field to get the "Custom List" of available screen designer screens and select the appropriate screen for the Description shown.
8. Select the Button checkbox if you want a button created; otherwise, it displays as a hyperlink.

What the User Sees

The example below shows the help text along with three buttons that were created.



Updates

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