



Screen Designer Overview

Version 24.x
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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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Overview

- Screen Designer allows you to develop and customize certain frames in M5 to fit your business needs.
- You can reorder, add, and remove fields.
- It also provides an additional level of security beyond the Field Security Template functionality as the custom frames can show limited views of data and you can remove certain fields deemed sensitive.
- For example, you may want to create two different Work Order Main frames: one with limited data for a certain group and one with access to more data for another group.
- This module requires an additional license.

Available Screen Designer Foundations

- Accident – Department
- Accident – Unit
- Booking Appointments
- Comm Part Charges
- Customer Unit View
- Customer View Work Order Detail
- Direct Invoice
- Director
- Employee
- Home Page
- Incident
- Message Editor
- Motor Pool Driver Profile
- Motor Pool Reservation
- Motor Pool Reservation Calendar
- Portal Logon
- Unit Attachment Query
- Unit Maintenance

- Unit Maintenance (no creation)
- Work Order
- Work Request Query

1. Screen Designer Basics

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

Screen Designer

General Information

Screen Name: <input type="text"/>	Description: <input type="text"/>
Allow User Customization: <input type="text" value="No"/> ▾	Foundation: <input type="text" value="?"/> ▾

Assemble **Organize**

Creating a screen

SAVE
UNDO
REFRESH
DELETE
FIND
ATTACH
MORE ▾
RELATED ▾

Screen Designer

General Information

Screen Name: Description:

Allow User Customization: Foundation:


Assemble
Organize

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


Screen Summary

<input checked="" type="checkbox"/> Screen Title	<input checked="" type="checkbox"/> Key Block	<input type="checkbox"/> Unit
<input type="checkbox"/> Insurance	<input type="checkbox"/> Driver	<input type="checkbox"/> Multiple parties
<input type="checkbox"/> Multiple registrations	<input type="checkbox"/> Trip	<input type="checkbox"/> Trip Question
<input type="checkbox"/> Accident Detail	<input type="checkbox"/> Condition	<input type="checkbox"/> Witness
<input type="checkbox"/> Police Information	<input type="checkbox"/> Claim	<input type="checkbox"/> Multi Claims
<input type="checkbox"/> Payments	<input type="checkbox"/> Work Order	<input type="checkbox"/> Vendor Estimate
<input type="checkbox"/> Work Requests	<input type="checkbox"/> Attachments	<input type="checkbox"/> Item (instance 1)
<input type="checkbox"/> Item (instance 2)	<input type="checkbox"/> Item (instance 3)	<input type="checkbox"/> Item (instance 4)

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

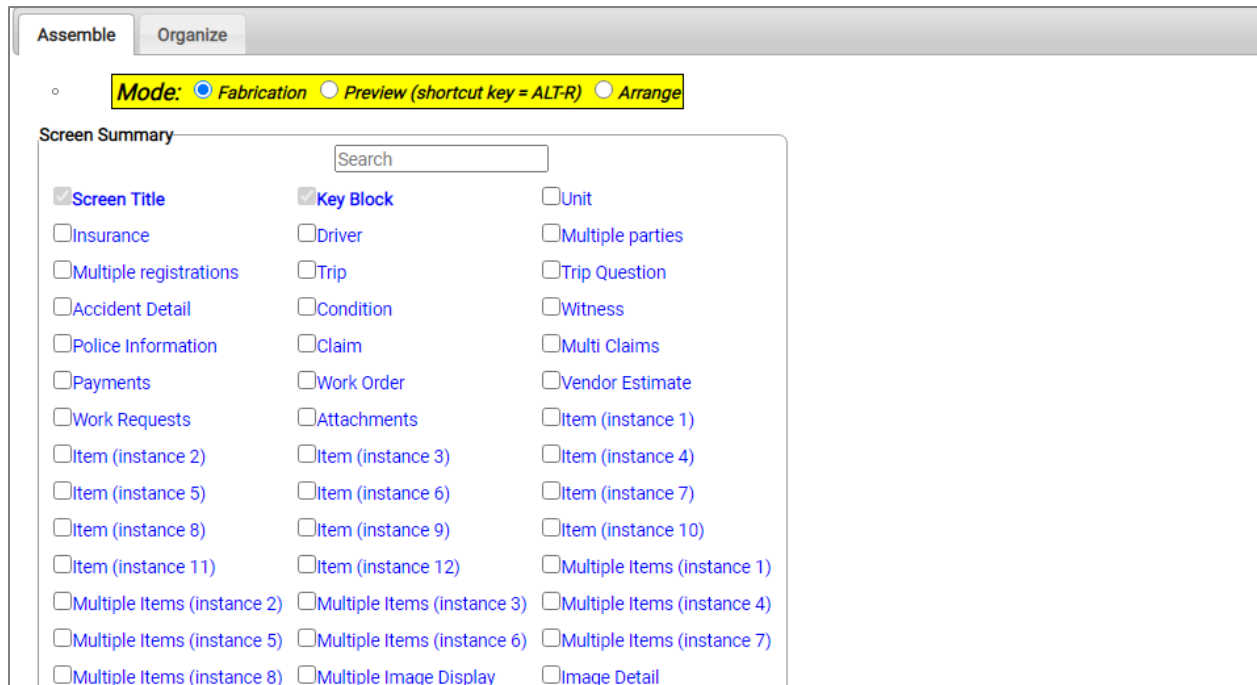
 When creating a new frame, you receive a prompt letting you know the frame does not exist. Select **Create** to confirm the action.

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

 Only select M5 frames are available in this module.

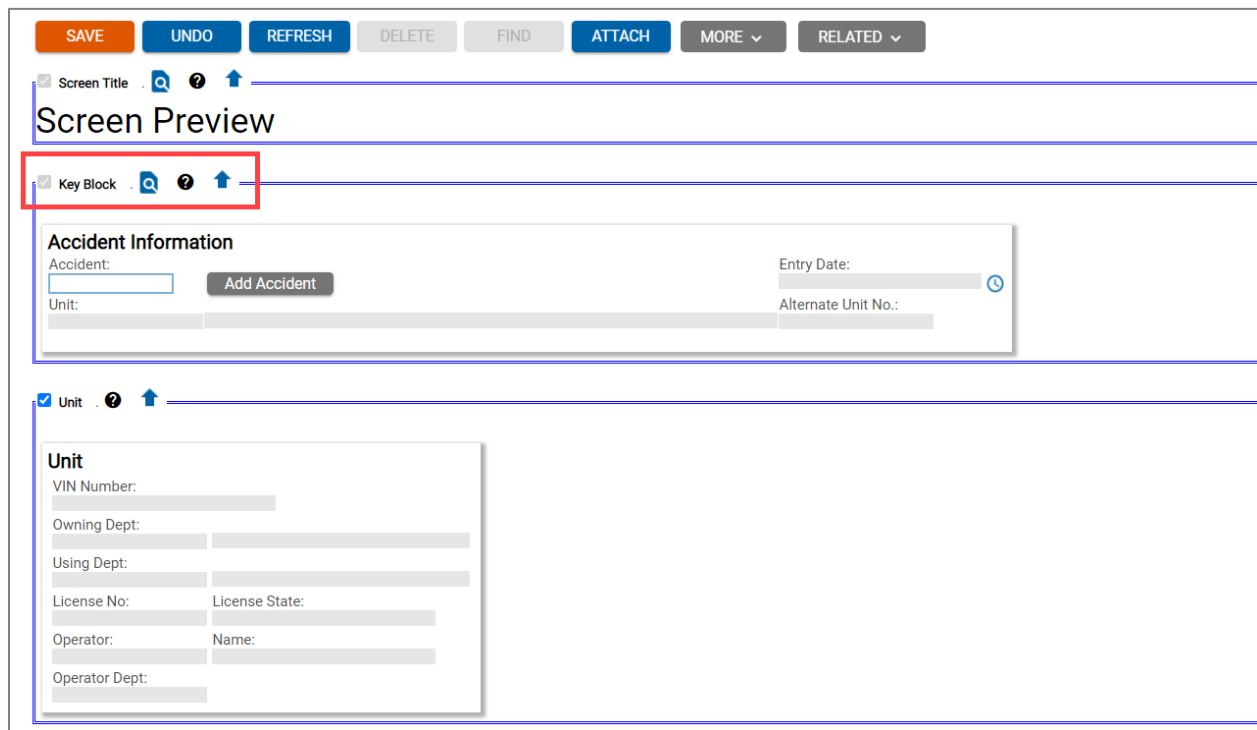
5. After you select a foundation, M5 will save the new frame automatically and load the frame **controls** on the **Assemble** tab.

Navigating the Assemble tab




- **Mode** – Radio buttons:
 - You begin in **Fabrication** mode by default. You will select and configure available controls using this mode.
 - **Preview** allows you to see a sample of what your design will look like when implemented in M5.
 - **Arrange** allows you to rearrange controls to further customize the frame layout and appearance by using drag and drop functionality.
- **Screen Summary** – This section contains a list of all available controls for the selected foundation. You can select the checkbox next to a control to add it to your frame.
 - Each foundation has a different set of controls.
 - Any mandatory controls will already be selected.
- **Preview User Controls** – You can view each control individually if you scroll past the Screen Summary section.
 - You can also select a checkbox to add the control to the foundation.
 - Included controls are outlined in blue. Excluded controls are outlined in red.

Control Options

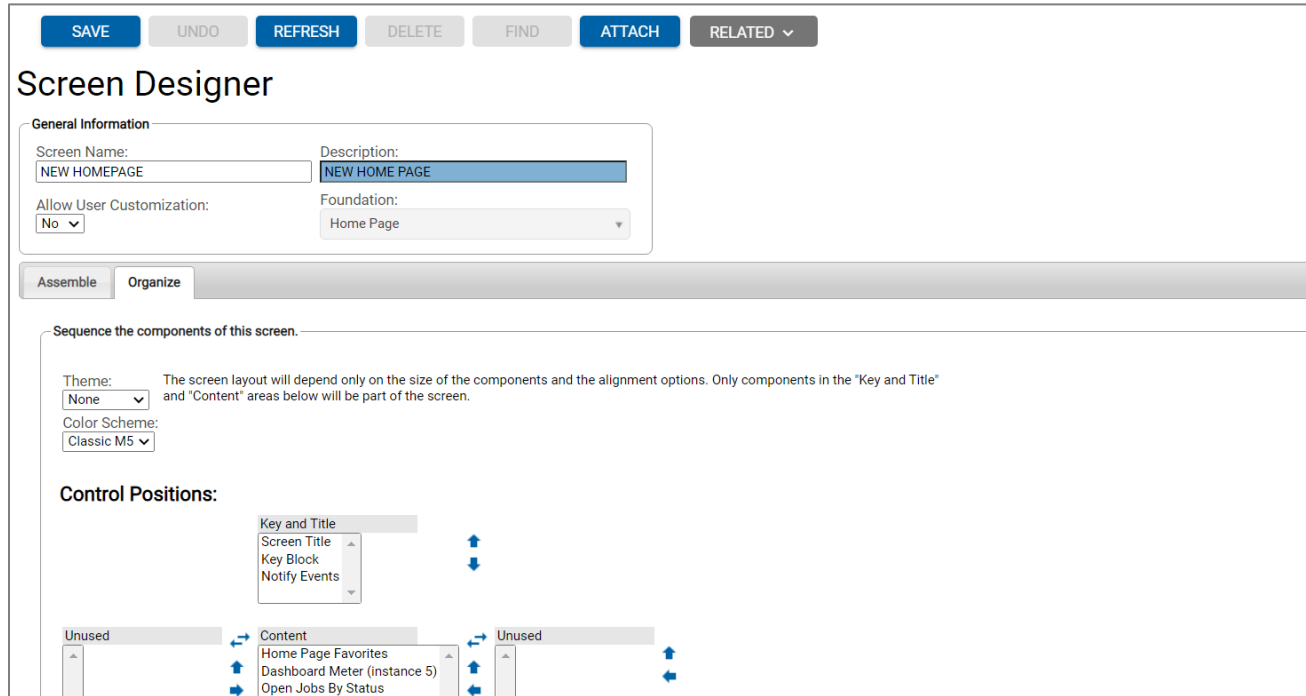


- Each control has up to four options at the top:
 - **Checkbox** (box next to control name) – To add/remove control from design.
 - **Property Sheet** (magnifying glass) – To edit any control-specific features, for example displaying the Add New Accident button or hiding it.
 - **Control Help** (question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

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

Navigating the Organize Tab

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



Theme

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

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

Color Scheme

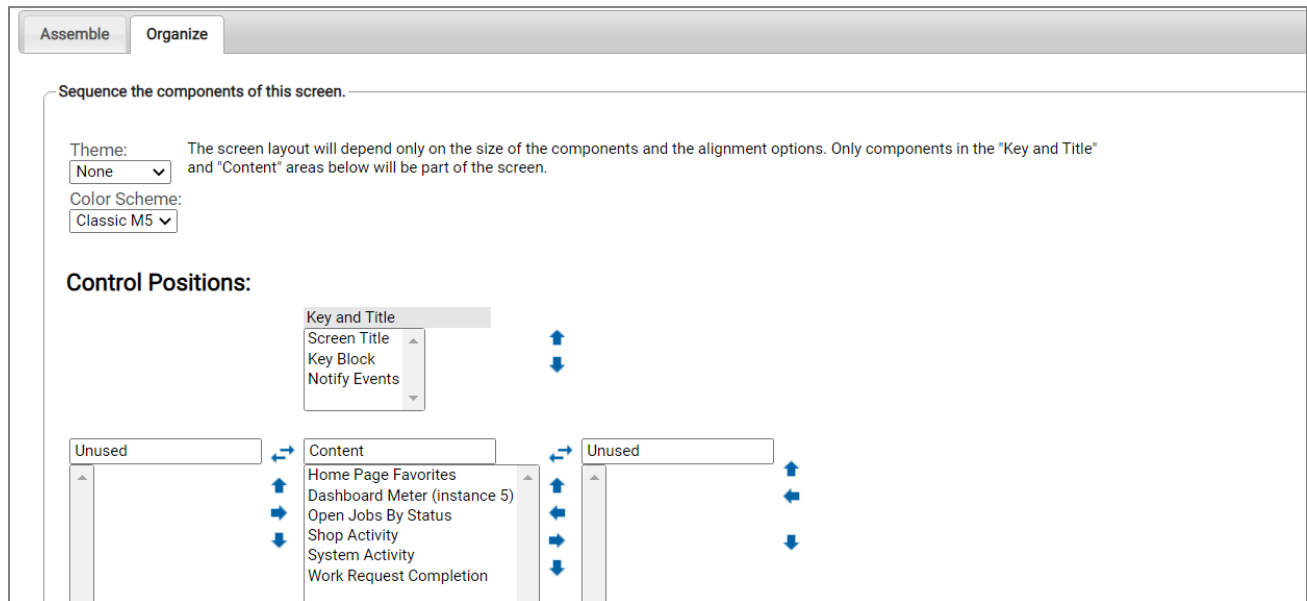
The color scheme choices are classic M5 and portal. Classic M5 shows a faint border around each control whereas the portal design has no border.

Control Arrangement

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

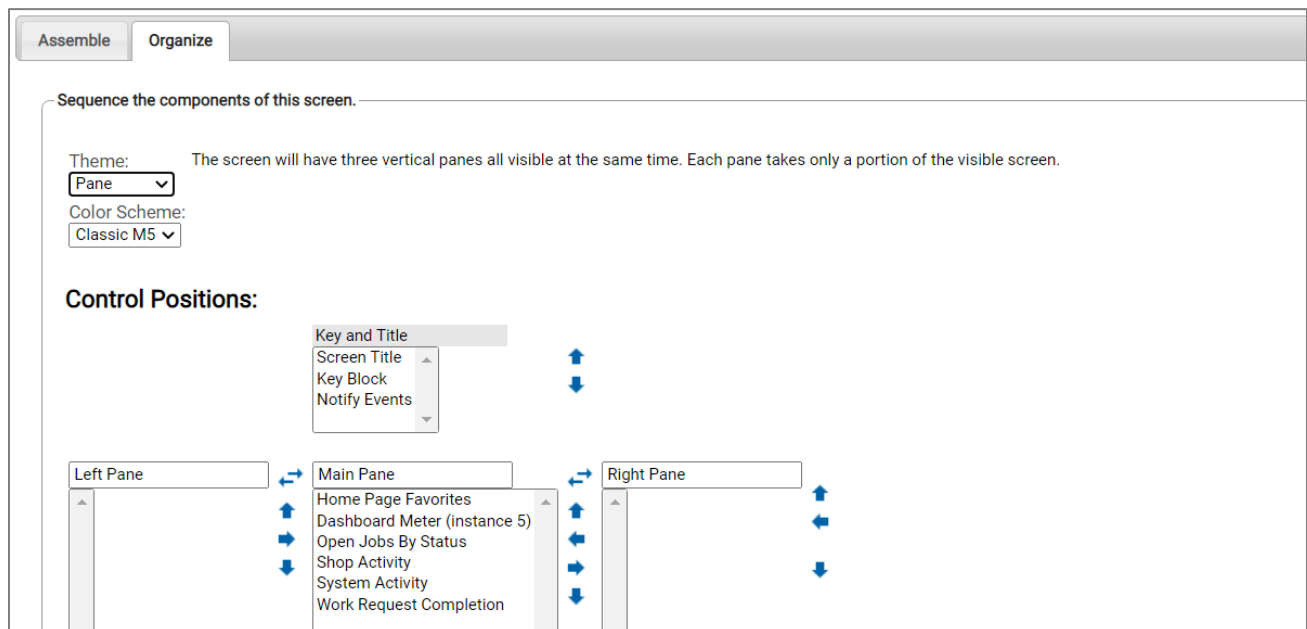
None Theme

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

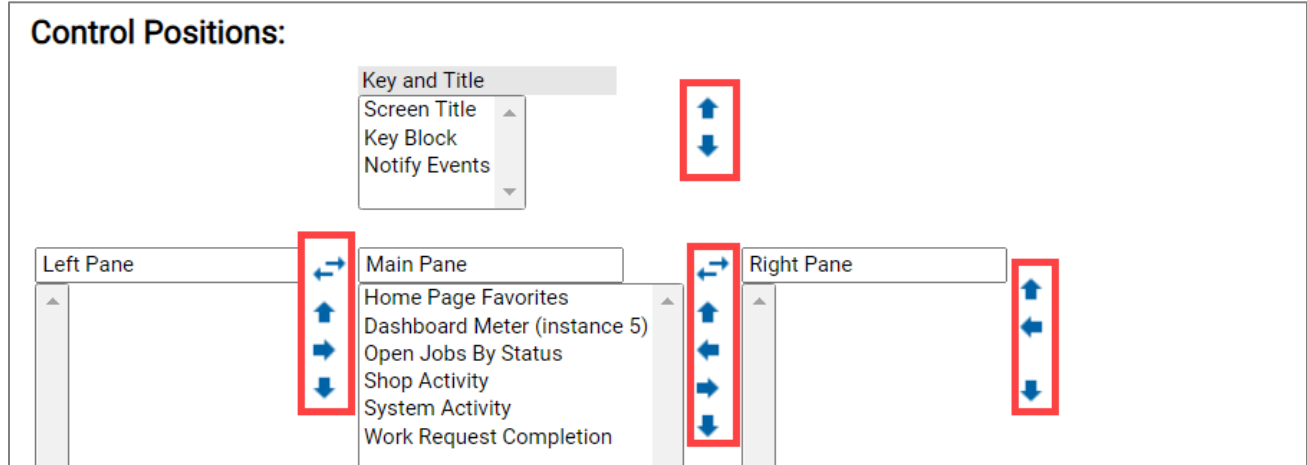


Pane Theme

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



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

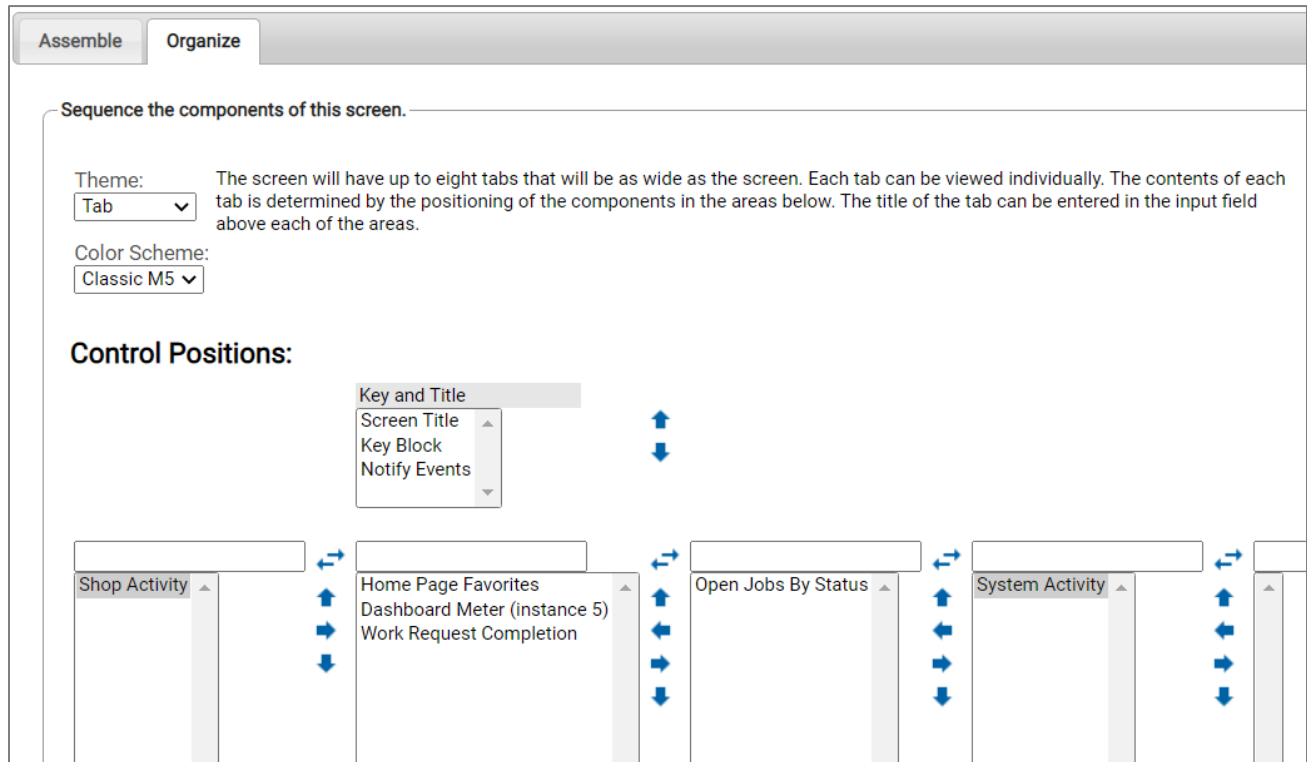


Or use the right and left directional arrows to move the Controls from one pane to another. This is also referred to as a Control Swapper.

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

Tab Theme

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

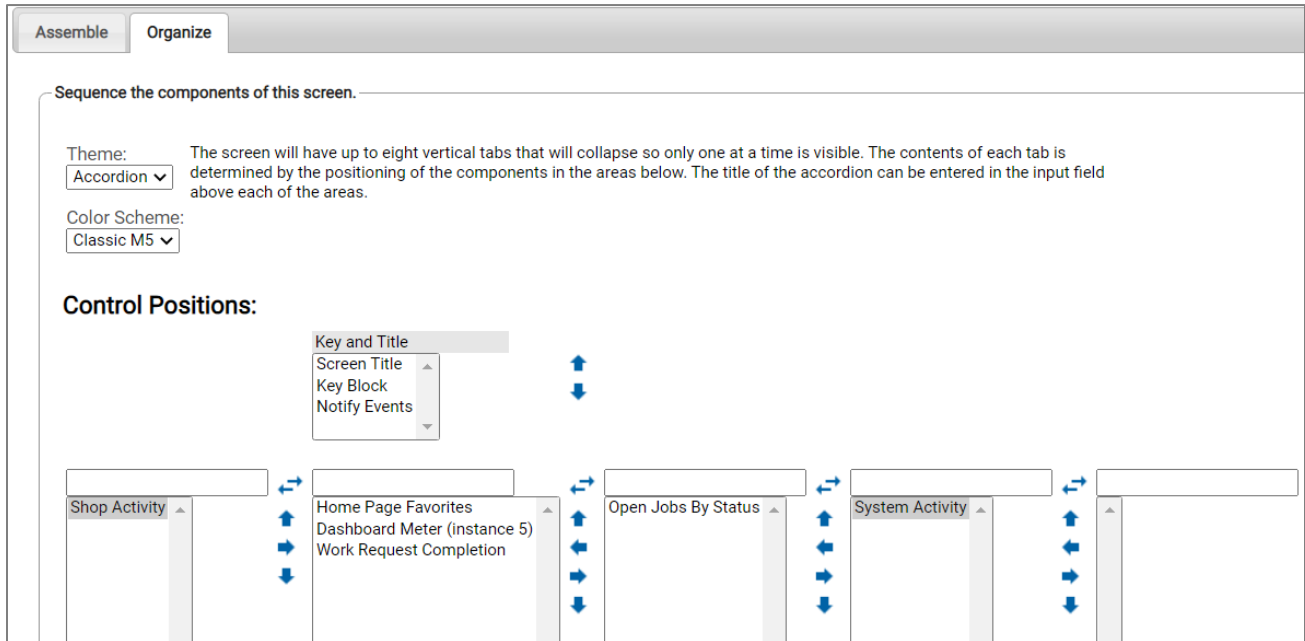


To add a title to the tab, enter the information in the blank space above each tabbed area. The title can contain up to 20 alphanumeric characters.

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

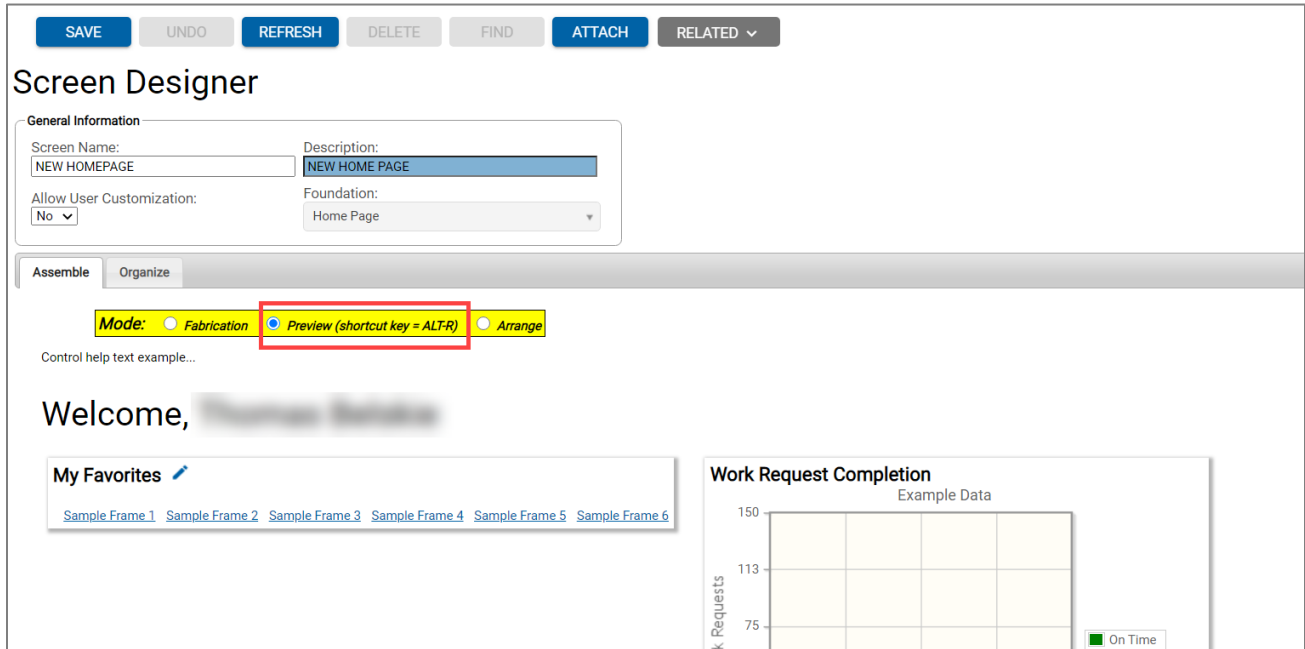
Accordion Theme

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



2. Preview Mode

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



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

3. 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/SCREENDSIGNER. If the foundation frame was DAF enabled, the new frame will be as well. The home page foundation is not DAF enabled.

Frame Maintenance

The screenshot displays the 'Frame Maintenance' interface. At the top, there are five buttons: 'SAVE' (blue), 'UNDO' (grey), 'REFRESH' (blue), 'DELETE' (blue), and 'FIND' (grey). Below the buttons is the title 'Frame Maintenance'. A section titled 'Report and Frame Information' contains a form with the following fields:

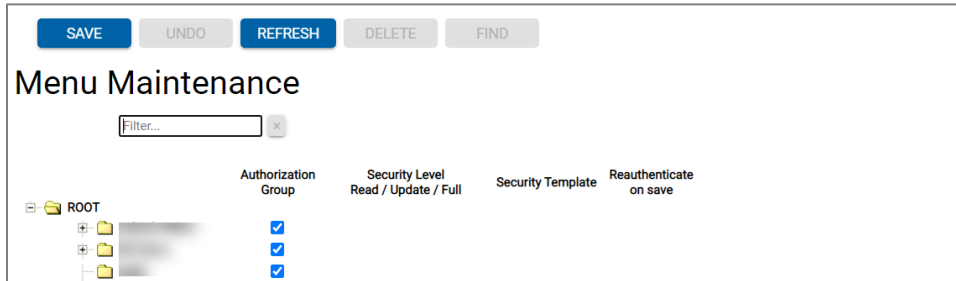
- URL: /PRESENTATION/SCREENDSIGNER/PROCESS.ASPX?INFO=NEW HOMEPAGE
- Type: Frame (dropdown)
- Audit: No (dropdown)
- Prohibited On Menu: No (dropdown)
- Disabled: No (dropdown)
- Description: NEW HOME PAGE
- Help URL: (empty text box)
- Authorized With URL: PUBLIC
- Component Name: mfiveUCHomePage.dll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

At the bottom of the form, there are two tabs: 'Menu List' (active) and 'Related Hyperlinks'.

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

Menu Maintenance

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



Updates

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