# AssetW**O**RKS

## **Motor Pool - Screen Designer**

User Guide

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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: <u>Community.AssetWorks.com</u>

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.

## Motor Pool - Screen Designer - User Guide

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## **Overview**

The M5 Screen Designer accomplishes these goals:

- 1. 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.
- 2. 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.
- 3. Allows multiple versions of the frame to be created for different users and workflows.

To support this functionality, specific M5 frames were redesigned and built-in small pieces. These pieces are logical and self-sufficient. They contain related data fields. These pieces are referred to as a Control. The user can build multiple frames from the same Controls.

The current security model is in place for all the frames that are designed to be used with the Screen Designer functionality including Department Access Functionality (DAF). The same menu level security is available. For instance, the custom frame can be assigned read-only mode, and field level security templates can still be used.

A foundation is a logical group of Controls. These are certified to work together and can use different business components (application programs). Foundation frames are defined by AssetWorks. A newly designed frame can have only one foundation frame; however, multiple foundations may be available for the same Controls.

Foundations define the mandatory Controls. A foundation frame, to create a record, must supply all the required data on a frame. A foundation frame to update a record can only update specific data.

## 1. Screen Designer – Motor Pool

SAVE UNDO	REFRESH DELETE	FIND ATTACH	RELATED ~
Screen Designe	r		
General Information			
Screen Name: MP EXAMPLE	Description: Motor Pool Screen De	signer Exemple	
Allow User Customization:	Foundation: Motor Pool Reservati		
Assemble Organize			
Mode: • Fabrication	Preview (shortcut key = ALT-	R) CArrange	
C Screen Summary			
	Search		
Screen Title	Key Block	Employee Requester Detail	
Current Reservations	Cancel Reservation	Pickup Date	
Return Date	Pickup Location	Return Location	
Rental Class Availability	Rental Class	Available Units	
Create New Reservation	Additional Information	□ <sub>Notes</sub>	
Confirmation	Print Ticket	Run Report (Instance 1)	
Run Report (Instance 2)	Run Report (Instance 3)	Spacer (Instance 1)	

### **Assemble Tab**

#### **Overview of Controls**

- Controls are simply small pages of information.
- Each group of logically related fields is a separate Control. Their relationship to other Controls is established by the foundation.
- Controls deal only with their own fields. There are no direct references to another Control's fields.
- 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 Controls**

1. To create a custom Work Order Main frame, enter a Screen Name and Description and select Work Order from the foundation dropdown. After save, make sure you are on the Assemble tab of the frame.

SAVE UNDO	REFRESH DELETE	FIND ATTACH	RELATED 🗸
Screen Designe	r		
General Information			
Orman Nama	Descriptions		
Screen Name: MP EXAMPLE	Description: Motor Pool Screen De	esigner Example	
Allow User Customization:	Foundation:		
	Motor Pool Reservat	ion 👻	
Assemble Organize			
Mode: O Fabrication	Preview (shortcut key = ALI	<del>-R) <sup>O</sup> Arrange</del>	
- Screen Summary			
	Search		
Screen Title			
- Screen ritte	Key Block	Employee Requester Detail	
Current Reservations	Key Block Cancel Reservation	Employee Requester Detail     Pickup Date	
	-		
Current Reservations	Cancel Reservation	Pickup Date	
Current Reservations	Cancel Reservation Pickup Location	Pickup Date Return Location	
Current Reservations  Return Date Rental Class Availability	Cancel Reservation Pickup Location Rental Class	Pickup Date Return Location Available Units	

- 2. There are two modes with radio buttons: Fabrication and Preview. Select the radio button for Fabrication when adding Controls to the frame. Select the Preview radio button to review the custom frame that was designed.
- 3. There are two sections for the Fabrication radio button:
  - a. Screen Summary Section
  - b. Preview Control Section
- 4. In the Screen Summary section:
  - a. 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.
- 5. Preview Control section Select a control by selecting the checkbox next to it. You can also double-click on the control to quickly navigate to the control further down the frame.

- 6. Any Control selected will show a blue border. Controls not selected have a red border. In addition to the required Controls, any additional Control groups can be selected by selecting the checkbox to the left of the Control.
- 7. After the checkbox is selected, the square will turn blue.



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

-	show/hide the pro	perty sheet for this control.						
_ •	Current Reservations							
'								
	now the current reservations for a user. This con od flag 2017 must be a Y or this control will not		n report button to rep	rint the motorpol ticket, It can	be associated	with the cancel rese	ervation butto	n so the user
	Property Sheet							
	Fields (Loaded 11 records)							
	Order Field	Override Description	Field width %	Always / Drill / Hidden	Required	See Legacy Mod Flag	<u>^</u>	
	10 Ticket:					·		
	30 Status Code:							
					0			
	40 Status:							

- 9. 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.
- 10. In the example below, color, text and images can be added/changed to the frame being developed.

SAVE UNDO	REFRESH	DELETE FIND ATTACH RELATED ~
🗾 Screen Title . 🝳 🔞	<b>1</b> —	
Property Sheet		
Attribute	Format	Value
Version	Character	
		Optional version number to be shown at the top of the screen.
Screen background color	Character	
		Background color for the new screen. It may be a named color known to Internet Explorer or it may be an RGB color specified in the format #RRGGBB
Screen background image URL	Character	
		A source path and name to an image file to be used as the background to the designed screen. Normally you should place the images in the /images folder parallel to /m5web and start this specification with /images/ + yourImage.png
		Total parallel to more and dark and opcontoation mary magely + yourimagelying
Report hookstowed image	Character	
Repeat background image	Character	Y or N. Should the background image repeat.
Image position left/right %	Integer	
inage position lettingit %	integel	Used to position a non-repeating background image. 0=Left 100=Right
Image position top/bottom %	Integer	
mage position top/bottom &	integer	Used to position a non-repeating background image. 0=Top 100=Bottom

#### Adding Help Text to a Control

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



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

#### Adding 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:

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

To add a new field to the frame, that 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 as shown below:

SAVE UNDO REF	RESH DELETE	FINE		
Items Master Defir	nition			
Item Selection       Type:       Motor Pool				
Motor Pool Item Information (New record num	mber 1)			
Item Type		Validated Value	Default Value	 Disabled
Chara	racter 🗸 🗌			
	Item	is not valida	ated (Loaded 0 records)	
	Value			

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 Control" section.

When a **Multiple Items Instance** is first selected, select the property sheet icon. By selecting Multiple Items, the user can pick and choose what 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.

An example is shown below. 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. 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 item has a list of values and dropdown is not selected, then the user will be able to double-click in the field to search the LoV.

<b>~</b>	Multiple En	nployee Items 💠 🕻	0 🕇 -								
'his o alida	ontrol allow ted item tha	/s any number of us at has a list of define	er defined items to	be displayed in a ver	tical table or list lik	ke format. Th	e "Drop Down"	check box will ca	ause the the va	alues to be lo	oadec
	ad Only:										
1	tems (Loade	ed 0 records)									
	Order	Description		Item Name		v	Always Required	Mixed Case	Drop Down		
	-										

#### Adding the Version Number

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

Format	Method Science Sci
	Value
Character	Optional version number to be shown at the top of the screen.
Character	
	Background color for the new screen. It may be a named color known to Internet Explorer or it may be an RGB color specified in the format #RRGGBB
Character	
	A source path and name to an image file to be used as the background to the designed screen. Normally you should place the images in the /images folder parallel to /m5web and start this specification with /images/ + yourImage.png
Character	
	Y or N. Should the background image repeat.
c	'haracter 'haracter

- 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.

## 2. Screen Designer Foundation Controls

### **Overview**

The Motor Pool Reservation Screen Designer functionality gives organizations the ability to design custom Motor Pool Reservation frames. This functionality can also be used as a component of setting up a Motor Pool Portal to permit external users (referred to as "outside" users) to view, create, cancel, and print motor pool tickets.

SAVE UNDO	<b>REFRESH</b> DELETE	FIND ATTACH	RELATED V
Screen Designe	r	N	
General Information		$\searrow$	]
Screen Name: SCREEN DESIGNER SAMPLE Allow User Customization: No V	Description: Screen Designer San Foundation: Motor Pool Reserva		
Assemble Organize			
Mode: • Fabrication	Preview (shortcut key = AL	T-R)	
		ing - Minange	
Screen Summary	Search		
Screen Summary	Search	Employee Requester Detail	
Screen Title	Key Block	Employee Requester Detail	
Screen Title	Key Block	Employee Requester Detail     Pickup Date	
Screen Title Current Reservations Return Date	Key Block Cancel Reservation Pickup Location	Employee Requester Detail     Pickup Date     Return Location	
Screen Title Current Reservations Return Date Rental Class Availability	<ul> <li>Key Block</li> <li>Cancel Reservation</li> <li>Pickup Location</li> <li>Rental Class</li> </ul>	Employee Requester Detail     Pickup Date     Return Location     Available Units	

The Motor Pool functionality must be configured in M5. M5 Motor Pool System flags that are configured for Motor Pool functionality apply to the Motor Pool Portal. In addition, the Motor Pool Notifications can be used with this functionality. However, the calendar feature only works with Outlook.

The screen designer foundation for this functionality is the Motor Pool Reservation. The Motor Pool Reservation foundation can be used to create one or more pages that are "linked" together to allow the user to check on his reservations, cancel reservations, and create reservations. The foundation has multiple user controls and these user controls may have property sheets to be used to configure the Motor Pool Portal frames.

In order for an outside user to use the Motor Pool Portal, a custom Portal Logon needs to be designed. This process is described in a separate document. The Motor Pool Portal also permits messages to be displayed on the custom frames. How to create messages that will be used in the Motor Pool foundation user controls is described in a separate document as well.

### Controls

#### **Screen Title**

_				
	Screen Title 🛛 💽 💡 1	·		
		-		
	Property Sheet			
	Attribute	Format	Value	
	Version	Character		
			Optional version number to be shown in the Tool Tip.	~
	Screen background color	Character		1
	Screen background color	Character	Background color for the new screen. It may be a named color known to Internet Explore	ar or it may be an PCR color energified in the format #PPCCBR
			background color for the new screen. It may be a named color known to internet Explore	e or it may be an Rob color specified in the format #RRGGbb
	Screen background image URL	Character		
			A source path and name to an image file to be used as the background to the designed	screen. Normally you should place the images in the /images
			folder parallel to /m5web and start this specification with /images/ + yourImage.png	
	Repeat background image	Character		1
	, , , , , , , , , , , , , , , , , , , ,		Y or N. Should the background image repeat.	J
	Image position left/right %	Integer		
			Used to position a non-repeating background image. 0=Left 100=Right	
	Image position top/bottom %	Integer		]
			Used to position a non-repeating background image. 0=Top 100=Bottom	J
	User defined help bg color	Character		

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, alignment of help text, etc.

#### **Employee Requestor Detail**

Requester Detail		
Reserved For:		
Department:		
# DEP 👻		
Phone No.:		
Ref No.:		
Requested By: On:		

#### **Current Reservations**

Current Reservations . Q 😧 🕇	
Show the current reservations for a user. This control can be associated with a run report button to reprint the motorpol ticket, It can be associated with the cance Mod flag 2017 must be a Y or this control will not work.	el reservation button so the user can cancel an existing reservation.
Current Reservations (Loaded 0 records)	
Status Pickup Pickup Location Return Location Ticket Code Status Pickup Return Reserve Location Name Location Name Rental Class	
·	

This control can be associated with a run report button to reprint the motor pool ticket. It can be associated with the cancel reservation button so the user can cancel an existing reservation.

A System Flag 2017 must be set to 'Y' or this control will not work.

#### **Cancel Reservation**

Cancel Reservation . Q	0	<b>+</b>
	•	
Cancel Reservation		

Allows you to add a Cancel Reservation button to the frame.

### **Pickup/Return Dates and Location**

<ul> <li>Pickup Date</li> <li> Pickup Date: </li> <li> Return Date </li> <li> Pickup Location: </li> </ul>	
Pickup Date:	Pickup Date . 🖸 🥹 🕇
<ul> <li>Return Date Q Pickup Location Q C</li> <li>Pickup Location Q C</li> <li>This control is a simple selection box that allows the user to select the pickup location. It cannot be used if the "Pickup/Return Information" control is used.</li> </ul>	This control allows the user to specify the pickup date using a calendar. It cannot be used if the "Pickup/Return Information" control is used.
<ul> <li>Return Date Q Pickup Location Q C</li> <li>Pickup Location Q C</li> <li>This control is a simple selection box that allows the user to select the pickup location. It cannot be used if the "Pickup/Return Information" control is used.</li> </ul>	
This control allows the user to specify the return date using a calendar. It cannot be used if the "Pickup/Return Information" control is used.          Return Date:         Pickup Location       Q       Q         This control is a simple selection box that allows the user to select the pickup location. It cannot be used if the "Pickup/Return Information" control is used.	Pickup Date:
This control allows the user to specify the return date using a calendar. It cannot be used if the "Pickup/Return Information" control is used.          Return Date:         Pickup Location       Q       Q         This control is a simple selection box that allows the user to select the pickup location. It cannot be used if the "Pickup/Return Information" control is used.	
This control allows the user to specify the return date using a calendar. It cannot be used if the "Pickup/Return Information" control is used.          Return Date:         Pickup Location       Q       Q         This control is a simple selection box that allows the user to select the pickup location. It cannot be used if the "Pickup/Return Information" control is used.	
Return Date:         Pickup Location         Image: Control is a simple selection box that allows the user to select the pickup location. It cannot be used if the "Pickup/Return Information" control is used.	
<ul> <li>Pickup Location . Q 2 1</li> <li>This control is a simple selection box that allows the user to select the pickup location. It cannot be used if the "Pickup/Return Information" control is used.</li> </ul>	This control allows the user to specify the return date using a calendar. It cannot be used if the "Pickup/Return Information" control is used.
Pickup Location  Pickup Location  Pickup Location  Pickup Location  Pickup/Return Information" control is used.	Deturn Deter
This control is a simple selection box that allows the user to select the pickup location. It cannot be used if the "Pickup/Return Information" control is used.	Return Date.
This control is a simple selection box that allows the user to select the pickup location. It cannot be used if the "Pickup/Return Information" control is used.	
	r 🗹 Pickup Location . 🝳 🔮 🕇
	This control is a simple selection boy that allows the user to select the nickup location. It cannot be used if the "Pickup/Paturn Information" control is used
Pickup Location:	This control is a simple selection box that allows the user to select the pickup location. It cannot be used if the Trokup/Actum information control is used.
·	Pickup Location:
	×

Controls for entering pickup and return dates and locations for motor pool reservations.

#### **Rental Class Availability**

Rental Class Availability .  Group=Select Rental Class	
Rental Class Availability	
Please select a location.	
Please select a pickup date.	
Please select a return date.	

#### **Rental Class**

🕝 🗹 Rental Class . 😧 🕇 Group=Select Rental Class —	
This control is a simple selection box that allows the user to select the rental class. It cannot be used if the "Class Availability" control is used.	
Rental Class:	
· ·	

Allows a user to select rental class from a dropdown menu.

#### Available Units

Available Units .	eselect what specific unit they want to re	ent. After all reservation detail has be	een entered this control will	list all the units that are still available
Available Units (Loaded Reserve Unit No Year		) Owning Meter Tech Tech S Dept Type Meter Spec Descrij	spec ption MCC	

Allows a user to specify what unit they want to reserve.

#### **Create New Reservation**

🗁 🗹 Create New Reservation 🗉 🚱 👚
This control is used in conjunction with the pickup/return and additional information controls. This control will create the reservation after the details have been entered If the screen is not being run as a portal user "reserved for" details are also required. The "save" control cannot be used in place of this control.
Create new reservation

This control is used in conjunction with the pickup/return and additional information controls. This control will create the reservation after the details have been entered. The details that are required are, class, pickup date, return date, pickup location and return location. If the frame is not being run as a portal user "reserved for" details are also required. The "save" control cannot be used in place of this control.

#### **Additional Information**

🗹 Additional Information . 🧕 😧	<b>t</b>	
Additional Information		
Destination:		
Reason:	_	
Account No.:		

#### Notes

eet Format Character	Value 2 The number of columns that should appear in each row of the note area.
Character	5 The number of rows that should appear in the note area.
•	Character Character

Allows users to add notes to reservation tickets, can specify number of columns and rows for the area.

#### Confirmation

<b>Notor Pool Confirma</b> Confirmation Number:	ation		
icket Number:			
rickup:	0		
.t:	Ŭ	_	
eturn:	0		
.t:	Ŭ		

#### **Print Ticket**

Allows user to print a motor pool ticket by selecting a print/email ticket button.

#### **Run Report (Instances 1-3)**

Allows user to run an M5 report by selecting a button, icon, or link.

#### Spacer (Instances 1-4)

This has the same features as the break control, but it does not force the next control to go to the left of the frame and you can control the width. This is useful in pane layout as it will force the pane to expand to accommodate this control. It can also be used to push a control to the right.

#### **MP View Calendar**

Color Key													
Pickup: 📕 Reserve: 🚺 Comple	ete: Cancelled:	Ар	proval N	leeded:	Ov	erDue:							
Dec 15, 2021 – Jan 13, 2022										Mont	h We	ek	
Motor Pool Schedule	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	M
	15	16	17	18	19	20	21	22	23	24	25	26	2

Allows a user to view motor pool reservations in various statuses by using a calendar feature.

#### **MP Reservation Info**

MP Reservation Info	0 1				
This control detail information	of motor pool reservations.				
Ticket Number:	Pickup Date:	Return Date:	Return Location:	Rental Class:	- 1

#### Break (Instances 1-9)

Forces the next control to go all the way to the left of the frame. This control can also display static informational text. If no text or HTML are defined a horizontal line will be displayed using the specified background color.

#### Image

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

#### **Reservation Item 1-6**

Reservation Item 1	
This controls allows the ad loaded from the validation	ldition of a user item to a screen as a new field. It can be formatted as a input field, checkbox or drop down. table.
:	

This controls allows the addition of a user item to a frame as a new field. It can be formatted as an input field, checkbox or dropdown. 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 Reservations Item**

This control allows any number of user defined items to be displayed in a vertical table or list like format. The Dropdown checkbox will cause the values to be loaded in a 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.

#### **Employee Item 1-3**

	– 🗹 Employee Item 1 . 🧕 😧 🕇
	This controls allows the addition of a user item to a screen as a new field. It can be formatted as a input field, checkbox or drop down. Joaded from the validation table.
L	

#### **Multiple Employee Items**

This 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 in a 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.

#### Message Viewer (Instances 1-4)

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

#### Static Message Viewer 1-4

This control provides a read-only view of a message entered during screen design. This control does not require an additional frame to maintain the message.

#### **Button Controls**

You have the option to add the following buttons: Save Button, Go Buttons (up to three, these allow navigation to another M5 frame), Logoff Button, Cancel Button.

#### **Contact Us**

— 🗹 Contact Us . 🖸 🕐 🕇 —————————————————————————————————	
— 🗹 Contact Us . 🝳 🔮 👕 —————————————————————————————————	
Allow the portal user to send an email if they need help. The target address	is is defined in the control and the user cannot change the destination.
<u>Contact Us</u> My Email Address:	
Cubicat.	]
Subject:	
Message:	1
Send Cancel	

Allows the portal user to send an email if they need help. The target address is defined in the control and the user cannot change the destination.

#### Hyperlinks

Using this control a user can link to another mfive frame or any external link. All frames that begin with HTTP or have the "New Window" checked will be opened in a separate window. In other cases the current window will be replaced.

## 3. 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.

SAVE UNDO F	REFRESH DELETE	FIND	АТТАСН	RELATED V
Saraan Daaignar				
Screen Designer				
Screen Name: MP EXAMPLE	Description: Motor Pool Screen D	esigner Example		
	Foundation:			
Allow User Customization:	Motor Pool Reserva	tion	Ŧ	
Assemble Organize			)	
— Sequence the components of this scree	en.			
Theme: The screen layout will None v and "Content" areas b	depend only on the size of the elow will be part of the screen.	components and t	he alignment optio	ns. Only components in the "Key and Title"
Color Scheme: Borders Off: V	ertical Mode:			
Classic M5 🗸				
Control Positions:				
	ey and Title			
	ey Block	t F		
Unused Co	ontent	→ Unused		
	ontact Us		+	

#### 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.

ssemble Organize	
Sequence the components of this screen.	
Theme: The screen layout will depend only on the size of the components and the alignment options. Only components in the "Key and Title" and "Content" areas below will be part of the screen.	
Color Scheme:	
Classic M5 V	
Control Positions:	
Key and Title	
Key Block	
*	
Unused	
Work Order Information	
Contact Information	
Cost Summary Meter Information	
Misc Links	
Visit Information Work Request Plan List	

#### Pane Theme

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

Assemble Organize				
- Sequence the components of this screen.				
Theme: The screen will have three vertical panes all visible at the same time. Each pane takes only a portion of the visible screen.				
Pane v				
Color Scheme: Classic M5				
Control Positions:				
Key and Title				
Key Block				
v v				
Left Pane _→ Main Pane _→ Right Pane				
Work Order Information Multiple Work Order Items (Instance 1)				
Contact Information				
Cost Summary Meter Information				
Misc Links Visit Information				
Vois monitorio Vois M				

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

Control Positions:	
	Key and Title Screen Title Key Block Notify Events
Left Pane ← →	Main Pane       Right Pane         Home Page Favorites       Image: Completion         Dashboard Meter (instance 5)       Image: Completion         Open Jobs By Status       Image: Completion         Shop Activity       Image: Completion

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.

Assemble       Organize         Sequence the components of this screen.         Theme:       The screen will have up to eight tabs that will be as wide as the screen. Each tab can be viewed individually. The contents of each tab is determined by the positioning of the components in the areas below. The title of the tab can be entered in the input field above each of the areas.		
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Tab v tab is determined by the positioning of the components in the areas below. The title of the tab can be entered in the input field above each of the areas.		
	as the screen. Each tab can be viewed individually. The contents of each n the areas below. The title of the tab can be entered in the input field	
Color Scheme:		
Classic M5 🗸		
Control Positions:		
Key and Title	•	
Key Block		
Visit Information A Work Order Information A Meter Information A Contact Information A A		
Cost Summary		
Winst Links Work Request Plan List		

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.



## 4. Preview Mode

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

ral Information	
een Name:	Description:
EXAMPLE	Motor Pool Screen Designer Example
w User Customization:	Foundation:
✓	Motor Pool Reservation
Mode: Fabrication	Preview (shortcut key = ALT-R) Arrange V
Mode: <u>Fabrication</u> Screen Preview Additional Information	Cancel Reservation Create new reservation
Mode: <u>Fabrication</u> Screen Preview	Cancel Reservation Create new reservation
Mode: Fabrication Creen Preview Additional Information	Cancel Reservation Create new reservation
Mode: Fabrication CCREEN Preview Additional Information Destination:	Cancel Reservation Create new reservation

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

## 5. 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**

SAVE UNDO REFRESH DELETE FIND	
Frame Maintenance	
Report and Frame Information URL:	
/PRESENTATION/SCREENDESIGNER/PROCESS.ASPX?INFO=NEW WORK ORDER MAIN	
Type: Audit: Frame ✓ No ✓	
Prohibited On Menu:         Disabled:           No         V	
Description: NEW WO MAIN	
Help URL:	
Authorized With URL:	
Component Name: mfiveUCWorkOrder.dll	
Sticky Fields:	
Dept. Access Function:	
Default Menu:	
Added In Version:	
Menu List 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 through Role Maintenance. Security templates can be applied to screen designer frames.

SAVE UNDO	REFRESH	DELETE	FIND	
Menu Mainten	ance			
Filter	×			
	Authorization Group	Security Level Read / Update / Full	Security Template	Reauthenticate on save
⊡- 🔄 ROOT				
÷- 🗀				
2 mm				

## Updates

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