



Screen Designer – Work Order

Application Training

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

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 may use different business components (application programs). Foundation frames are defined by AssetWorks. A newly designed frame may have only one foundation frame; however, multiple foundations may be available for the same Controls.

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

1. Screen Designer – Work Order

SAVE
UNDO
REFRESH
DELETE
FIND
ATTACH
RELATED ▾

Screen Designer

General Information

Screen Name: NEW WORK ORDER MAIN	Description: NEW WO MAIN
Allow User Customization: No ▾	Foundation: Work Order ▾

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"/> Work Request List
<input checked="" type="checkbox"/> Work Request Plan List	<input checked="" type="checkbox"/> Work Order Information	<input checked="" type="checkbox"/> Visit Information
<input type="checkbox"/> Worker Order Express Complete, Close and Cancel	<input checked="" type="checkbox"/> Meter Information	<input checked="" type="checkbox"/> Contact Information
<input checked="" type="checkbox"/> Cost Summary	<input type="checkbox"/> Cost Summary (Wide)	<input checked="" type="checkbox"/> Misc Links
<input type="checkbox"/> Job Information	<input type="checkbox"/> Labor Charge Information	<input type="checkbox"/> Commercial Charge Information
<input type="checkbox"/> Stock Part Charge Information	<input type="checkbox"/> Comm Summary	<input type="checkbox"/> Authorized Comm Amounts
<input type="checkbox"/> Fluid Charge Information	<input type="checkbox"/> Material Summary	<input type="checkbox"/> Non-Stock Part Charge Information
<input type="checkbox"/> Equipment Condition	<input type="checkbox"/> Attachments	<input type="checkbox"/> Multiple Image Display
<input type="checkbox"/> Image Detail	<input type="checkbox"/> Break (Instance 1)	<input type="checkbox"/> Break (Instance 2)
<input type="checkbox"/> Break (Instance 3)	<input type="checkbox"/> Break (Instance 4)	<input type="checkbox"/> Break (Instance 5)
<input type="checkbox"/> Break (Instance 6)	<input type="checkbox"/> Break (Instance 7)	<input type="checkbox"/> Break (Instance 8)

Assemble Tab

Overview of Controls

Controls are small pages of information:

- Each group of related fields is a separate control. The relationship to other controls is established by the foundation.
- 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 the control. These are set by AssetWorks if the data must be present for the business logic to function.

Adding Controls

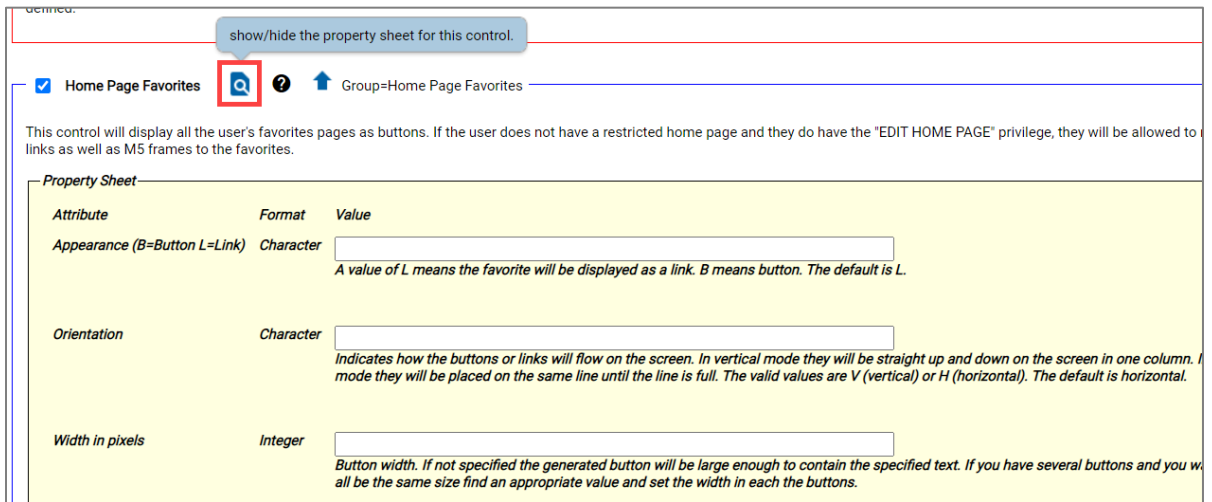
1. To create a custom *Work Order Main* frame, enter a **Screen Name**, **Description** and select **Work Order** from the foundation dropdown. After **SAVE**, verify that you are on the *Assemble* tab of the frame.

The screenshot shows the 'Screen Designer' interface. At the top, there are buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', 'ATTACH', and 'RELATED'. Below these is the 'Screen Designer' title and a 'General Information' section. In this section, 'Screen Name' is 'NEW WORK ORDER MAIN', 'Description' is 'NEW WO MAIN', and 'Foundation' is 'Work Order'. The 'Assemble' tab is selected. Below the tabs, there is a 'Mode' section with radio buttons for 'Fabrication' (selected), 'Preview (shortcut key = ALTR)', and 'Arrange'. The 'Screen Summary' section contains a search bar and a list of controls with checkboxes. Selected controls include 'Screen Title', 'Key Block', 'Work Order Information', and 'Work Request List'. Other controls include 'Work Request Plan List', 'Worker Order Express Complete, Close and Cancel', 'Cost Summary', 'Meter Information', 'Cost Summary (Wide)', 'Visit Information', 'Contact Information', and 'Misc Links'.

2. There are two modes with radio buttons: *Fabrication* and *Preview*. Select the *Fabrication* radio button when adding controls to the frame. Select the *Preview* radio button to review the custom frame that was designed. There are two sections for the *Fabrication* radio button.
 1. Screen Summary
 2. Preview Control
3. **Screen Summary** section - Controls that are required on this frame are automatically selected. The controls can be selected by selecting the checkbox in front of the specific controls.
4. **Preview Control** section - Select a control by selecting the checkbox next to it. You can double-click on the control to quickly navigate to the control further down the frame.
5. Any control selected displays a blue border. Controls not selected have a red border. In addition to the required controls, any additional control groups can be selected by selecting the checkbox to the left of the control. After the checkbox is selected the square is blue.

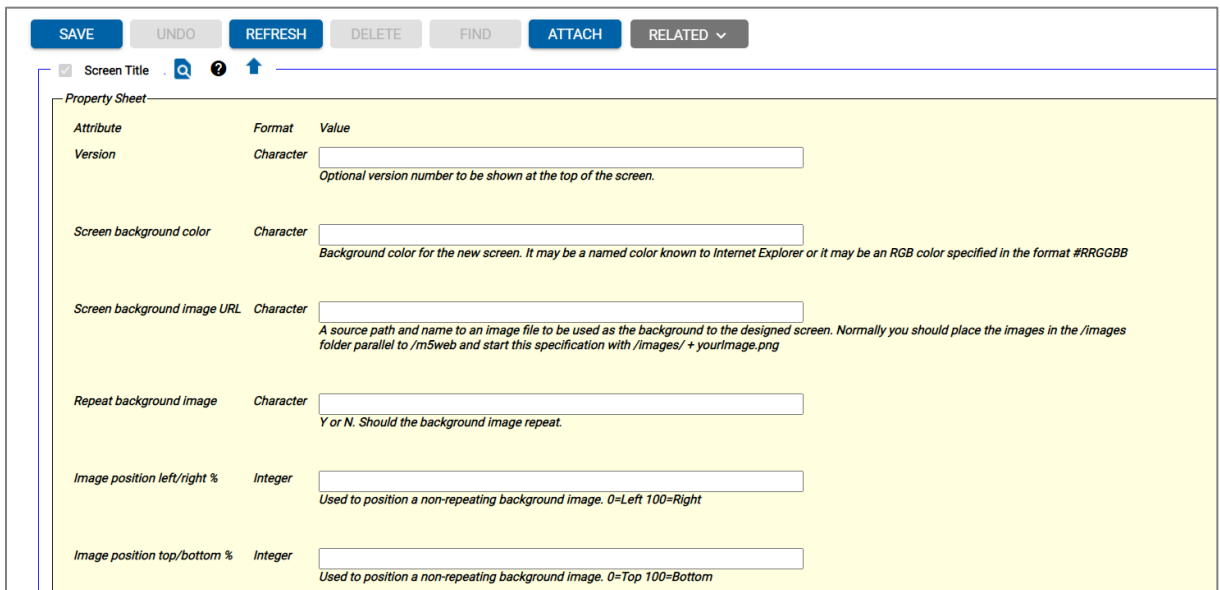
The screenshot shows a 'Home Page Favorites' control. It has a title 'My Favorites' and a list of sample frames: 'Sample Frame 1', 'Sample Frame 2', 'Sample Frame 3', 'Sample Frame 4', 'Sample Frame 5', and 'Sample Frame 6'. The control is described as displaying all the user's favorite pages as buttons.

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




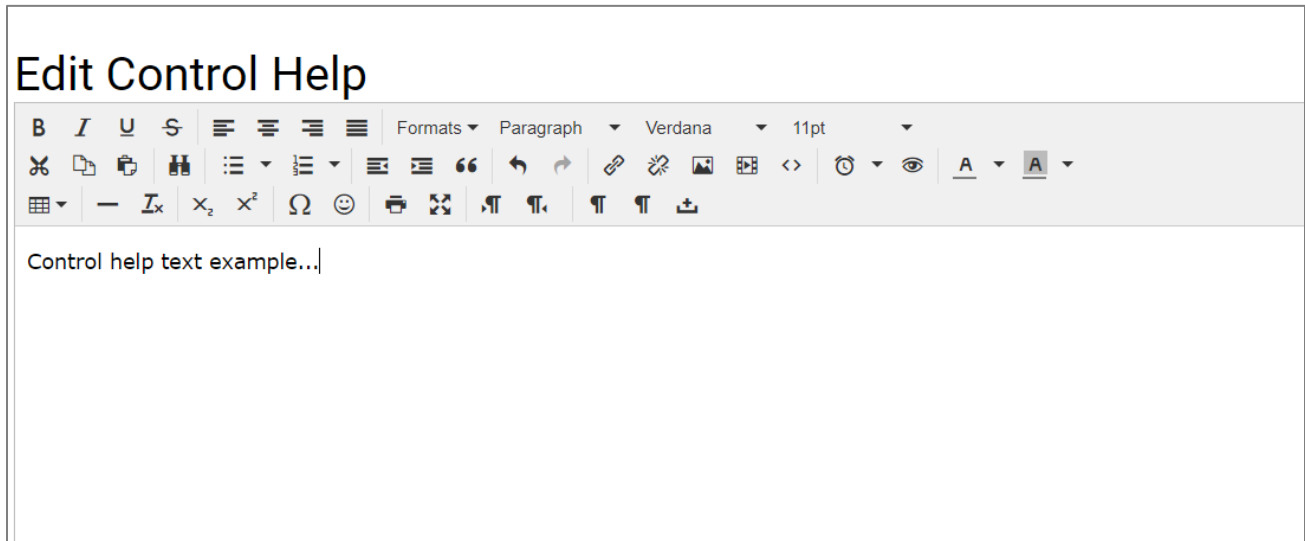
7. In the *Preview Control* section, if there is a **Note Pad** icon to the right of the control name, there is a property sheet for the control. Please note, not all controls have property sheets and not all property sheets are the same for the controls. To display the control's property sheet and make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

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



Adding Help Text to a Control

To add user-defined help text, select the  icon. Straight text or html can be entered. Limited to 444 characters that can be entered.



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

Adding Fields to a Frame

Custom user fields are added to the frame as items. Items reside in a separate table. The controls for adding items are:

- **Individual** – Finite number per frame set by the Foundation.
 - **Multiple** – One control and repeating rows for as many items are needed.
1. 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.

SAVE UNDO REFRESH DELETE FIND

Items Master Definition

Item Selection
Type: Work Order

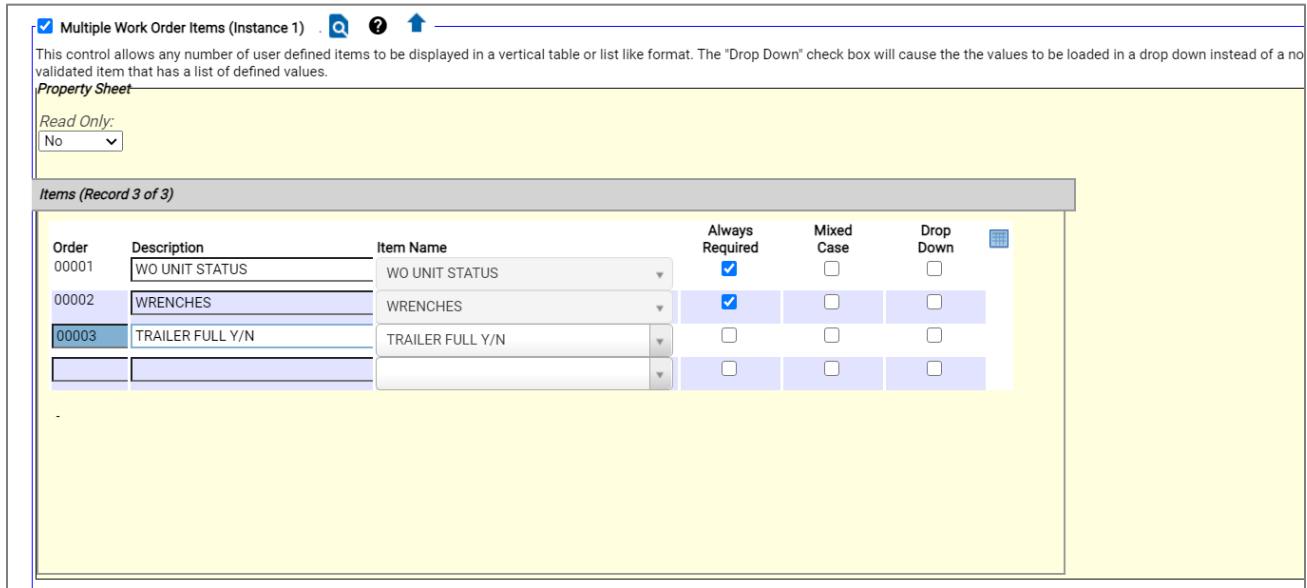
Work Order Item Information (New record number 17)

Item	Type	Mandatory Item	Validated Value	Default Value	Disabled
PO NBR	Character	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
RM 1	Character	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TEST 4	<input type="checkbox"/>
WIRES	Number	<input type="checkbox"/>	<input type="checkbox"/>	3	<input type="checkbox"/>
WO UNIT STATUS	Character	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Test1	<input type="checkbox"/>
WRENCHES	Character	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Trailer Full Y/N	Character	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

Item is not validated (Loaded 0 records)

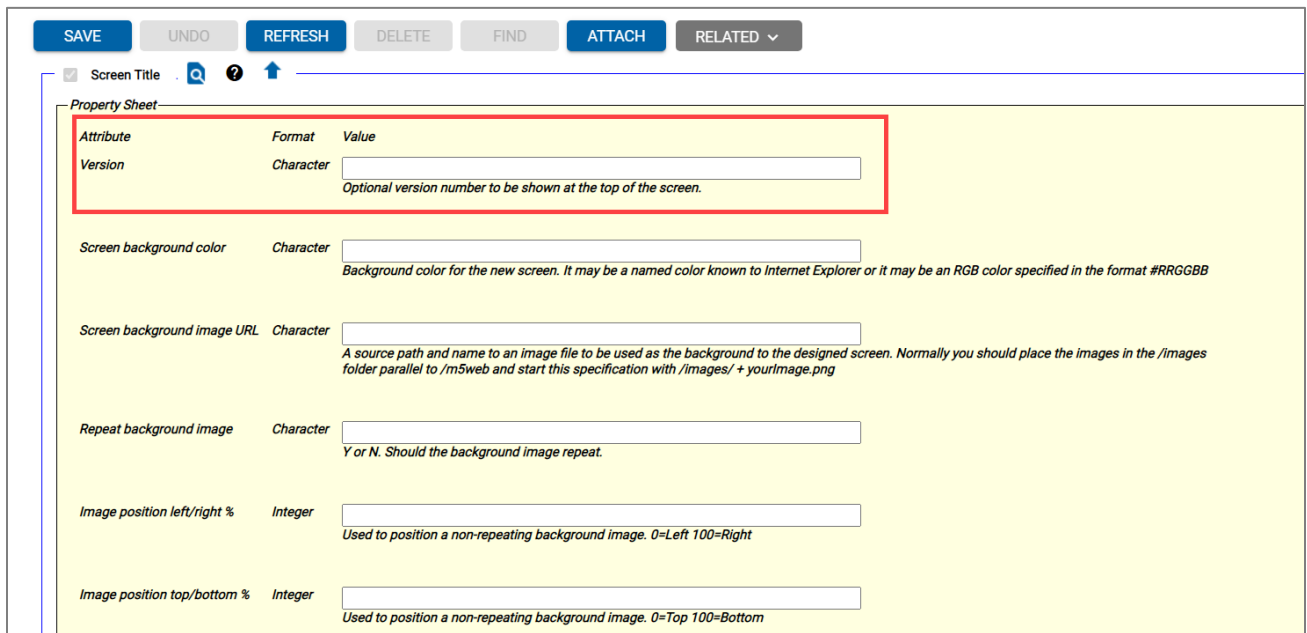
Value

2. The next step is to navigate to the *Screen Designer* frame to add this item to the custom frame. Multiple items can be added by first selecting a *Multiple Items Instance* in Screen Summary or go directly to the *Preview Control* section. When a *Multiple Items Instance* is first selected, select the **Property Sheet** icon. By selecting *Items*, the user can select the items to display on the frame. For example, if there is more than one work order item that should be displayed as a group, then use this option. Controls called Item (instance 1 thru 12) allow for only one work order item to display as a field.
3. The **Order** sets the sequence of the items in the control. The **Description** is the field label the user will see on the frame. It is case sensitive. Double-click in the **Item Name** to select the corresponding work order item. The dropdown is used to view a list of values by selecting the down arrow. **Always Required** makes the field required on the new frame. If the item has a list of values and **Drop Down** is not selected, the user will be able to double-click in the field to search by using the List of Values (LoV).



Adding the Version Number

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



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. Work Order Foundation Controls

Screen Title

Attribute	Format	Value
Version	Character	<input type="text"/> <i>Optional version number to be shown in the Tool Tip.</i>
Screen background color	Character	<input type="text"/> <i>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</i>
Screen background image URL	Character	<input type="text"/> <i>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</i>
Repeat background image	Character	<input type="text"/> <i>Y or N. Should the background image repeat.</i>
Image position left/right %	Integer	<input type="text"/> <i>Used to position a non-repeating background image. 0=Left 100=Right</i>
Image position top/bottom %	Integer	<input type="text"/> <i>Used to position a non-repeating background image. 0=Top 100=Bottom</i>
User defined help bg color	Character	<input type="text"/>

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

Key Block

Attribute	Format	Value
Title	Character	<input type="text"/> <i>Enter the title you want to appear above the key block.</i>
Key field label	Character	<input type="text"/> <i>Enter the text to be displayed to the left of the key entry field.</i>
Secondary page	Character	<input type="text"/> <i>Enter a Y to automatically query the current work order number. This can only be done for secondary pages on a multiple page work order design.</i>
Query By Work Order Number	Character	<input type="text"/> <i>Enter an N to prevent a work order number from being use to query from the key block. The default is Y. Note: If you allow work order query, only work orders for the types unit, department, component that are selected below will be allowed.</i>
Query By Unit Number	Character	<input type="text"/> <i>Enter an N to prevent a unit number from being use to query from the key block. The default is Y.</i>

The **Key Block** control allows the name of the section to be changed, the *Key field label*, *Secondary page* and search query information that allows you to specify what objects can be queried and created by the frame (wo number, unit number, department number, component number). Additionally, this allows a specific work order frame to be designed for departments but excludes units.

Work Request List

Attribute	Format	Value
Auto Open Work Request List	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is No)</i>
Display Work Plans	Character	<input type="text"/> <i>Show Y=Yes, N=No, When set to Y will display work plan number for each work request, as well as additional jobs that are on each work plan. (Default is No)</i>
Display Defect Info	Character	<input type="text"/> <i>Show Y=Yes, N=No, When set to N will hide the Defect Number and Cannot be Driven fields. (Default is Yes)</i>

Attributes:

- Auto Open Work Request List
- Display Work Plans
- Display Defect Info

Value

Displays a pop-up when the work order is entered. The pop-up that appears displays outstanding work requests with the ability to add as jobs to the work order. The **Work Request List** link displays on the *Work Order Main* frame.

Auto Open Work Request List – *Show Y=Yes, N=No, (Default is No).*

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

Display Defect Info – *Show Y=Yes, N=No, When set to N will hide the Defect Number and Cannot be Driven fields. (Default is Yes).*

Work Request Plan List

Work Request Plan List is an optional feature in M5 that groups work requests together. There is no property sheet for this control and the control will display as a hyperlink on the *Work Order Main* frame.

Work Order Information

Attribute	Format	Value
Work Order Information label	Character	<input type="text"/> <i>Enter the title you want to appear above the Work Order Information block.</i>
Reason	Character	<input type="text" value="N"/> <i>Show Y=Yes, N=No, (Default is No)</i>
Tech Spec	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is No)</i>
Alt Unit Number	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is No)</i>
Title Number	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is No)</i>
Asset Number	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is No)</i>
Customer	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is No)</i>
Customer Name	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is No)</i>
Contract	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is No)</i>
Booking Number	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is No)</i>
WO Leading Job Status	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is No)</i>
Genuine Parts	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is No)</i>
Owning and Using Departments	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is No)</i>

Work Order Information		
WO Number:	WO Status:	Location:
9000007645		

The **Work Order Information** control contains the header information for the **Work Order Main** frame with fields for **Unit/Department/Component** or **Work Order** number, **WO Status**, **Location**, **Unit/Department/Component Status** and **VIN** number.

Attributes:

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

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

Value

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

Visit Information

✔ Visit Information 🔍 ? ↑ Group=Work Order Close control

Property Sheet

Attribute	Format	Value
WO Reference	Character	<input style="width: 90%; border: 1px solid #ccc;" type="text" value="Y"/> <small>Show Y=Yes, N=No, (Default is Y)</small>
Equipment Profile	Character	<input style="width: 90%; border: 1px solid #ccc;" type="text"/> <small>Show Y=Yes, N=No, (Default is No)</small>
Complete WO Signature	Character	<input style="width: 90%; border: 1px solid #ccc;" type="text"/> <small>Show Y=Yes, N=No, (Default is No)</small>

Visit Information

Reason:

Open: 🕒

Completed: ✎

Complete

Closed:

Closed

Due: 🕒

Downtime:

Est Complete:

WO Reference:

Parking Loc:

The **Visit Information** control contains the work order fields: **Reason**, **Open** date, **Completed** date, **Closed** date, **Due** date, **Downtime**, **Est Complete** date, **WO Reference**, and **Parking Loc**.

Attributes:

- WO Reference
- Equipment Profile
- Complete WO Signature

Value

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

Work Order Express Complete, Close, and Cancel

The **Work Order Express Complete, Close, and Cancel** control is used when building work order express frames only. It cannot be added if the **Visit Information** control is on the frame.

Meter Information

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

Attributes:

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

Value

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

Contact Information

Attribute	Format	Value
Name	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is Y)</i>
Phone	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is Y)</i>
Ext	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is Y)</i>
Notified	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is Y)</i>
Pickup	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is Y)</i>

The **Contact Information** control Property Sheet **Attributes**:

- Name
- Phone
- Ext
- Notified
- Pickup

Value

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

Cost Summary

Attribute	Format	Value
Limit	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is Y)</i>
Labor Hours	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is Y)</i>
Total Est Hours	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is Y)</i>
Labor	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is Y)</i>
Material	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is Y)</i>
Commercial	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is Y)</i>
Total Est Cost	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is Y)</i>
Work Order Limit Popup	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is Y)</i>

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

Attributes:

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

Values

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


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

Cost Summary (Wide)

Attribute	Format	Value
Limit	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is Y)</i>
Labor Hours	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is Y)</i>
Labor	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is Y)</i>
Total Est Hours	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is Y)</i>
Material	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is Y)</i>
Commercial	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is Y)</i>
Total Est Cost	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is Y)</i>
Work Order Limit Popup	Character	<input type="text"/> <i>Show Y=Yes, N=No, (Default is N)</i>

Cost Summary (Wide) control offers the same fields, attributes, and values as the **Cost Summary** control with the only difference being the fields are shown horizontal instead of vertical.

Misc. Links



Attribute	Format	Value
Part Reserves	Character	<input type="text"/> Show Y=Yes, N=No, (Default is Y)
Part Requests	Character	<input type="text"/> Show Y=Yes, N=No, (Default is Y)
Clear Fault Codes	Character	<input type="text"/> Show Y=Yes, N=No, (Default is Y)
Part Fabrication	Character	<input type="text"/> Show Y=Yes, N=No, (Default is Y)
Associated Tech Spec	Character	<input type="text"/> Show Y=Yes, N=No, (Default is Y)
Warranty Claims	Character	<input type="text"/> Show Y=Yes, N=No, (Default is Y)
Linked Jobs	Character	<input type="text"/> Show Y=Yes, N=No, (Default is Y)
Service Orders	Character	<input type="text"/> Show Y=Yes, N=No, (Default is Y)
Render as buttons	Character	<input type="text"/> Show Y=Yes, N=No, (Default is Y)

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

Attributes:

- Part Reserves
- Part Requests
- Clear Fault Codes
- Part Fabrication
- Associated Tech Spec
- Warranty Claims
- Linked Jobs
- Service Orders
- Render as buttons

Value

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

Job Information

Job Information

Property Sheet

Fields (Loaded 35 records)

Order	Field	Override Description	Field width %	Always / Drill / Hidden	Required	See Legacy Mod Flag
10	Job:			<input type="radio"/>	<input type="checkbox"/>	
15	Signature:			<input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>	<input type="checkbox"/>	
20	Description:			<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	
30	Zonar:			<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	

Size and Layout Attributes

Attribute	Format	Value
Frame Height %	Number	<input type="text"/>
<i>This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.</i>		
Frame Break	Character	<input type="text"/>

The **Job Information** control contains fields and attributes for every field that exists within the **Job** tab on *Work Order Main*. The order of the fields can be changed, the description of the fields can also be changed, and each field can always be displayed. Drill which means the user must select the job line to display it in a table right below the field or it can be made hidden. It is recommended to make any fields not used hidden, to save frame space and make it easier on users.

Attributes and Values:

- **Frame Height %** - Default is 200. *This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.*
- **Frame Break** – *By default the frame will insert a break and start at the left side of the screen. Enter “N” to not break and allow the frame to be automatically positioned.*
- **Drill Height %** - Default is 10. *This adjusts the height of the drill down area relative to its default side. A value of 200 (percent) will double the size of the frame.*
- **Drill down title** – *The title that will be displayed above the drill down area.*
- **Drill down Orientation** – *Orientation of the drill down area relative to the data frame, V=Vertical, H=Horizontal. Vertical will be below it. Horizontal alongside it. The default is V.*
- **Drill down column width** – *The number of columns to be shown side by side in the drill down area. The default is 1.*
- **Legend or label** – *Displayed on the screen as the label for this signature field.*

Labor Charge Information

✓ Labor Charge Information
🔍
?
↑

Property Sheet

Fields (Loaded 13 records)

Order	Field	Override Description	Field width %	Always / Drill / Hidden	Required	See Legacy Mod Flag
10	Job:	<input type="text"/>	<input type="text"/>	<input type="radio"/>	<input type="checkbox"/>	
20	Description:	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	
30	Employee No:	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	
40	Name:	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	

Size and Layout Attributes

Attribute	Format	Value
Frame Height %	Number	<input type="text"/>

This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.

The Labor Charge Information control contains fields and attributes for every field that exists within the **Labor** tab on *Work Order Main*. The order of the fields can be changed, the description of the fields can also be changed, and each field can always be displayed. Drill which means the user must select the job line to display it in a table right below the field or it can be made hidden. It is recommended to make any fields not used hidden, to save frame space and make it easier on users.

Attributes and Values:

- **Frame Height %** - Default is 200. *This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.*
- **Frame Break** – *By default the frame will insert a break and start at the left side of the screen. Enter “N” to not break and allow the frame to be automatically positioned.*
- **Drill Height %** - Default is 10. *This adjusts the height of the drill down area relative to its default side. A value of 200 (percent) will double the size of the frame.*
- **Drill down title** – *The title that will be displayed above the drill down area.*
- **Drill down Orientation** – *Orientation of the drill down area relative to the data frame, V=Vertical, H=Horizontal. Vertical will be below it. Horizontal alongside it. The default is V.*
- **Drill down column width** – *The number of columns to be shown side by side in the drill down area. The default is 1.*

Commercial Charge Information

Commercial Charge Information

Property Sheet

Fields (Loaded 18 records)

Order	Field	Override Description	Field width %	Always / Drill / Hidden	Required	See Legacy Mod Flag
10	Job:			<input type="radio"/>	<input type="checkbox"/>	
20	Description:			<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	
25	Service Code:			<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	
30	Vendor:			<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	

Size and Layout Attributes

Attribute	Format	Value
Frame Height %	Number	<input type="text"/>

This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.

The **Commercial Charge Information** control contains fields and attributes for every field that exists within the **Commercial** tab on *Work Order Main*. The order of the fields can be changed, the description of the fields can also be changed, and each field can always be displayed. Drill which means the user must select the job line to display it in a table right below the field or it can be made hidden. It is recommended to make any fields not used hidden, to save frame space and make it easier on users.

Attributes and Values:

- **Frame Height %** - Default is 200. *This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.*
- **Frame Break** – *By default the frame will insert a break and start at the left side of the screen. Enter “N” to not break and allow the frame to be automatically positioned.*
- **Drill Height %** - Default is 10. *This adjusts the height of the drill down area relative to its default side. A value of 200 (percent) will double the size of the frame.*
- **Drill down title** – *The title that will be displayed above the drill down area.*
- **Drill down Orientation** – *Orientation of the drill down area relative to the data frame, V=Vertical, H=Horizontal. Vertical will be below it. Horizontal alongside it. The default is V.*
- **Drill down column width** – *The number of columns to be shown side by side in the drill down area. The default is 1.*

Stock Part Charge Information

Stock Part Charge Information

Property Sheet

Fields (Loaded 20 records)

Order	Field	Override Description	Field width %	Always / Drill / Hidden	Required	See Legacy Mod Flag
10	Job:			<input type="radio"/>	<input type="checkbox"/>	
20	Description:			<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	
30	Part Number:			<input type="radio"/>	<input type="checkbox"/>	
40	Effective Date:			<input type="radio"/>	<input type="checkbox"/>	

Size and Layout Attributes

Attribute	Format	Value
Frame Height %	Number	<input type="text"/>
<i>This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.</i>		
Frame Break	Character	<input type="text"/>

The **Stock Part Charge Information** control contains fields and attributes for every field that exists for stock parts within the **Part** tab on *Work Order Main*. The order of the fields can be changed, the description of the fields can also be changed, and each field can always be displayed. Drill which means the user must select the job line to display it in a table right below the field or it can be made hidden. It is recommended to make any fields not used hidden, to save frame space and make it easier on users.

Attributes and Values:

- **Frame Height %** - Default is 200. *This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.*
- **Frame Break** – *By default the frame will insert a break and start at the left side of the screen. Enter “N” to not break and allow the frame to be automatically positioned.*
- **Drill Height %** - Default is 10. *This adjusts the height of the drill down area relative to its default side. A value of 200 (percent) will double the size of the frame.*
- **Drill down title** – *The title that will be displayed above the drill down area.*
- **Drill down Orientation** – *Orientation of the drill down area relative to the data frame, V=Vertical, H=Horizontal. Vertical will be below it. Horizontal alongside it. The default is V.*
- **Drill down column width** – *The number of columns to be shown side by side in the drill down area. The default is 1.*

Comm Summary

Comm Summary . ? ↑

Commercial Calculations

Total Labor:	Total Part:	Total Misc:	Total Tax:	Total Cost:	Total Cost With Markup:

The **Comm Summary** control displays the total fields for all commercial charges, broken down by charge type, that have been applied to a work order. This control does not contain attributes, but help can be added.

Authorized Comm Amounts

Authorized Comm Amounts . 🔍 ? ↑

Property Sheet

Fields (Loaded 4 records)

Order	Job	Field	Override Description	Field width %	Always / Drill / Hidden	Required	See Legacy Mod Flag
10		Job:	<input type="text"/>	<input type="text"/>	<input type="radio"/>	<input type="checkbox"/>	
20		Description:	<input type="text"/>	<input type="text"/>	<input type="radio"/>	<input type="checkbox"/>	
30		Vendor:	<input type="text"/>	<input type="text"/>	<input type="radio"/>	<input type="checkbox"/>	
40		Amount:	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	

Size and Layout Attributes

Attribute	Format	Value
Frame Height %	Number	<input type="text"/>

This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.

The **Authorized Comm Amounts** control contains fields and attributes for every field that exists for authorizing commercial repairs performed by vendors within the **Comm** tab on *Work Order Main*. The order of the fields can be changed, the description of the fields can also be changed, and each field can always be displayed. Drill which means the user must select the job line to display it in a table right below the field or it can be made hidden. It is recommended to make any fields not used hidden, to save frame space and make it easier on users.

Attributes and Values:

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

- **Drill Height %** - Default is 10. *This adjusts the height of the drill down area relative to its default side. A value of 200 (percent) will double the size of the frame.*
- **Drill down title** – *The title that will be displayed above the drill down area.*
- **Drill down Orientation** – *Orientation of the drill down area relative to the data frame, V=Vertical, H=Horizontal. Vertical will be below it. Horizontal alongside it. The default is V.*
- **Drill down column width** –*The number of columns to be shown side by side in the drill down area. The default is 1.*

Fluid Charge Information

Fluid Charge Information

Property Sheet

Fields (Loaded 10 records)

Order	Field	Override Description	Field width %	Always / Drill / Hidden	Required	See Legacy Mod Flag
10	Job:			<input type="radio"/>	<input type="checkbox"/>	
20	Description:			<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	
30	Job Location:			<input type="radio"/>	<input type="checkbox"/>	
40	Issue Date:			<input type="radio"/>	<input type="checkbox"/>	

Size and Layout Attributes

Attribute	Format	Value
Frame Height %	Number	<input type="text"/>

This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.

The **Fluid Charge Information** control contains fields and attributes for every field that exists for charging fluids within the **Fluid** tab on *Work Order Main*. The order of the fields can be changed, the description of the fields can also be changed, and each field can always be displayed. Drill which means the user must select the job line to display it in a table right below the field or it can be made hidden. It is recommended to make any fields not used hidden, to save frame space and make it easier on users.

Attributes and Values:

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

- **Drill down title** – *The title that will be displayed above the drill down area.*
- **Drill down Orientation** – *Orientation of the drill down area relative to the data frame, V=Vertical, H=Horizontal. Vertical will be below it. Horizontal alongside it. The default is V.*
- **Drill down column width** – *The number of columns to be shown side by side in the drill down area. The default is 1.*

Material Summary

The **Material Summary** control contains the total fields, by inventory location, for all part and fluid charges issued to a work order. There are no attributes for this control and only help can be added.

Non-Stock Part Charge Information

Order	Field	Override Description	Field width %	Always / Drill / Hidden	Required	See Legacy Mod Flag
10	Job:			<input type="radio"/>	<input type="checkbox"/>	
20	Description:			<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	
30	Part Number:			<input type="radio"/>	<input type="checkbox"/>	
35	Effective Date:			<input type="radio"/>	<input type="checkbox"/>	

Size and Layout Attributes

Attribute	Format	Value
Frame Height %	Number	<input type="text"/>

This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.

The **Non-Stock Part Charge Information** control contains fields and attributes for every field that exists for non-stock parts within the **Part** tab on *Work Order Main*. The order of the fields can be changed, the description of the fields can also be changed, and each field can always be displayed. Drill which means the user must select the job line to display it in a table right below the field or it can be made hidden. It is recommended to make any fields not used hidden, to save frame space and make it easier on users.

Attributes and Values:

- **Frame Height %** - Default is 200. *This adjusts the height of the iframe relative to its default side. A value of 200 (percent) will double the size of the frame.*
- **Frame Break** – *By default the frame will insert a break and start at the left side of the screen. Enter “N” to not break and allow the frame to be automatically positioned.*
- **Drill Height %** - Default is 10. *This adjusts the height of the drill down area relative to its default side. A value of 200 (percent) will double the size of the frame.*
- **Drill down title** – *The title that will be displayed above the drill down area.*
- **Drill down Orientation** – *Orientation of the drill down area relative to the data frame, V=Vertical, H=Horizontal. Vertical will be below it. Horizontal alongside it. The default is V.*
- **Drill down column width** – *The number of columns to be shown side by side in the drill down area. The default is 1.*

Equipment Condition

The screenshot shows a control titled "Equipment Condition" with a checked checkbox, a help icon (question mark), and an up arrow icon. Below the title is a pop-up window titled "Equipment Information" containing two input fields: "Equipment Condition:" and "Bin No:". The "Equipment Condition:" field is currently empty, and the "Bin No:" field contains a greyed-out value.

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

Attachments

Attachments

Using this control the screen designer can create a list of attachments that the user can upload and associate with this record. Attachments can be marked as required. This only indicates to the user that the attachment is required. The user will be able to save data without the attachment being present.

Property Sheet

Title: Title Text:

Border:

Attachments (Loaded 0 records)

Order	Description	Required
		<input type="checkbox"/>

Attachments

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

If you want to give this section a title on the form, enter **Y** in the **Title** field and proceed to give it a description in the **Title Text** field. If you want a border around this section on the form, enter **Y** in the **Border** field.

Proceed to enter the **Order** you want the attachments to display on the form with a **Description**. This description is the name the user will see on the form. If the attachment is **Required**, select the checkbox.

Multiple Image Display

Attribute	Format	Value
<input checked="" type="checkbox"/> Multiple Image Display		
<i>Property Sheet</i>		
Title	Character	<input type="text"/> <i>Description of this control. Defaults to "Image".</i>
Image Width	Number	<input type="text"/> <i>Image display width in pixels. The height will be calculated to maintain a 9X16 (Width X Height) aspect ratio. The default width is 300.</i>
Use Attached Images	Character	<input type="text"/> <i>A value of Y will make all jpg and png files that are attached to this record available in this control in addition to any images defined below.</i>
Image Description 1	Character	<input type="text"/>
Image File 1	Character	<input type="text"/> <i>This is the URL to retrieve the image. It may be a full URL starting with HTTP otherwise it must be in the Standard_Images directory. The List Of Values may be used to select images from the Standard_Images directory. This applies to all the image files on this page.</i>
Image Description 2	Character	<input type="text"/>

The **Multiple Image Display** control allows up to eight images that can be displayed for the customer to designate on the image where the damage occurred or what needs maintenance.

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

The important fields here are the **Image Description** and the **Image File** as these fields contain the title the user will see and the URL of where the file or image is respectively.

You can double-click the **Image File** field to select the image.

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

Image Detail

Image Detail

Property Sheet

Attribute	Format	Value
Title	Character	<input type="text"/>

Description of this control. Defaults to "Image Details". If you want to show the key in this title enter "{0}" in your title where you want the key value to be placed. The key value being accident number or unit number depending on which foundation the control is used in.

Image Details (Loaded 0 records)

Description

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

Break Instance (1-9)

Breaks are used to leave a blank area or space before or after one of the other controls. It is useful to help make the form look a little neater. There are up to nine breaks available. The designer can add text as a heading by using the Text or HTML field.

Go Button Instance (1-6)

Go Button allows for the designer to create buttons or links to other forms. When the user selects the button or link, the form will auto-save. One use can be that the form is so long, you want to design the form to have multiple pages.

Cancel Button

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

Hyperlinks

The **Hyperlinks** control allows a user to link to another M5 frame or any external link. All frames that begin with HTTP or have the **New Window** checkbox selected will be opened in a separate window. In other cases, the current window will be replaced.

Note Instances (1-6)

The **Note** control allows the creation of an additional note area. The number of row and columns can be controlled by using the arrange mode of screen designer and adjusting the size of the note area.

Run Report Instances (1-3)

The **Run Report** control allows the user to run an M5 report by selecting a button, icon or link.

Static Message Viewer (1-4)

The **Static Message Viewer** control provides a read-only view of a message entered during screen design.

Item Instances (1-12)

The **Item** control allows the addition of a user item to a frame as a new field. It can be formatted as **Text**, **CheckBox**, or **Drop Down**. A specific list of values can be entered for a dropdown or, if left blank and the item is a validated item, they will automatically be loaded from the validation table.

Multiple Work Order Items Instances (1-4)

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

Multiple Unit Items

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

Multiple Department Items

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

Multiple Component Items

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

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** **REFRESH** **DELETE** **FIND** **ATTACH** **RELATED** ▾

Screen Designer

General Information

Screen Name: NEW WORK ORDER MAIN Description: NEW WO MAIN

Allow User Customization: No Foundation: Work Order

Assemble **Organize**

Sequence the components of this screen.

Theme: None 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

Control Positions:

Key and Title

Screen Title

Key Block

Unused

Content

Work Order Information

Multiple Work Order Items (Instance 1)

Unused

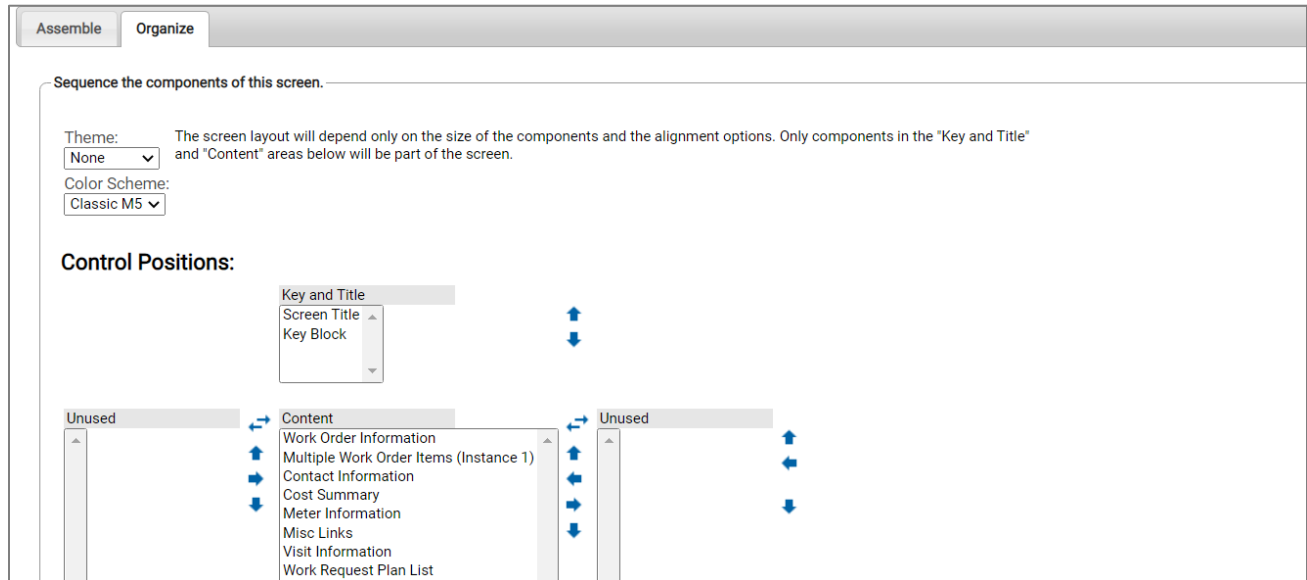
Theme

The **Theme** is used to determine how the controls are presented on the frame. From the dropdown list you can select:

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

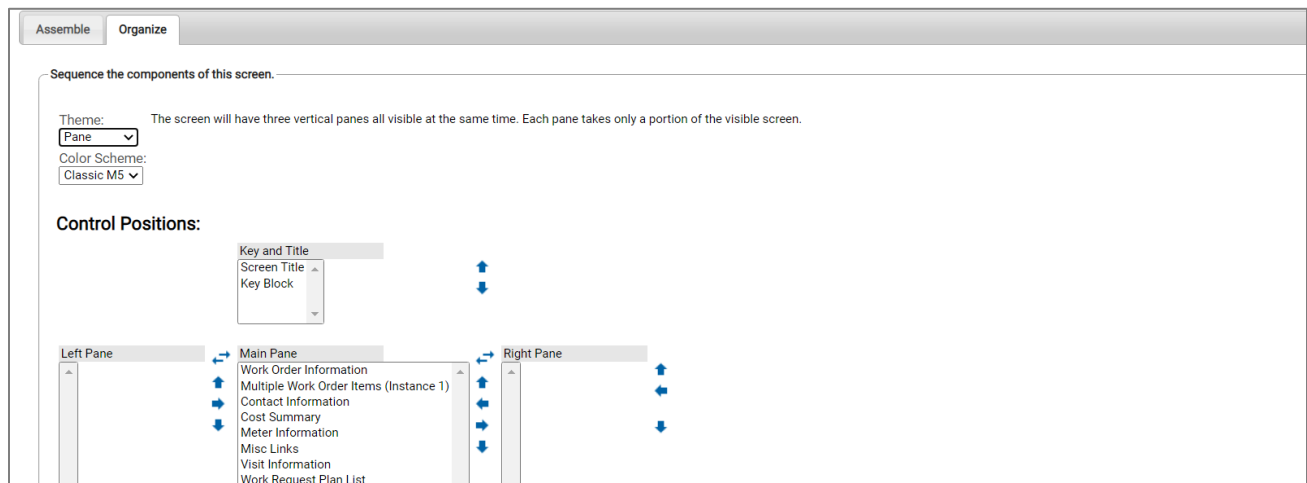
None

The **None** theme frame layout depends only on the size of the components and the alignment options. Only the middle section called content needs to have each control added.



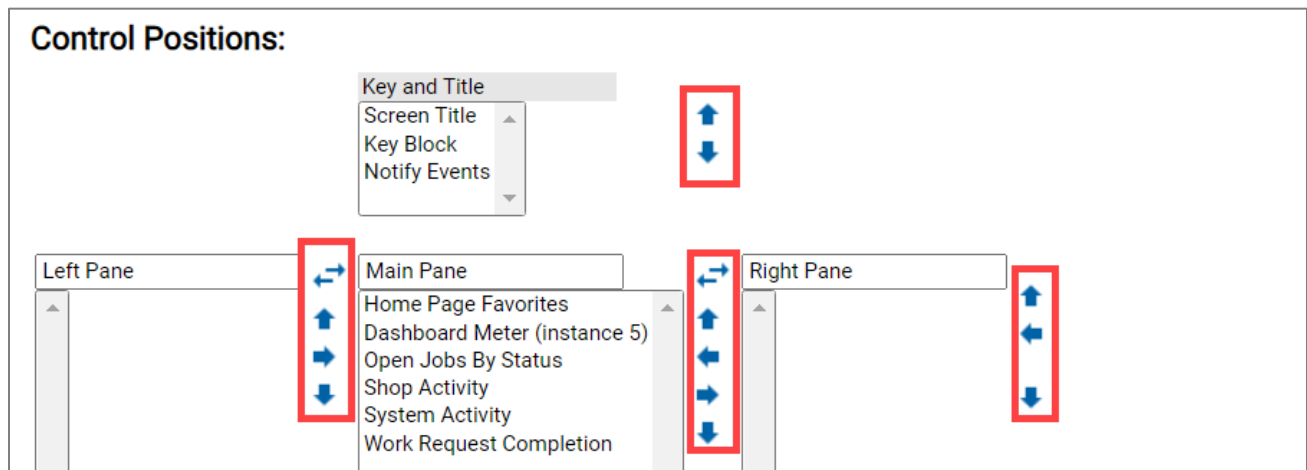
Pane

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



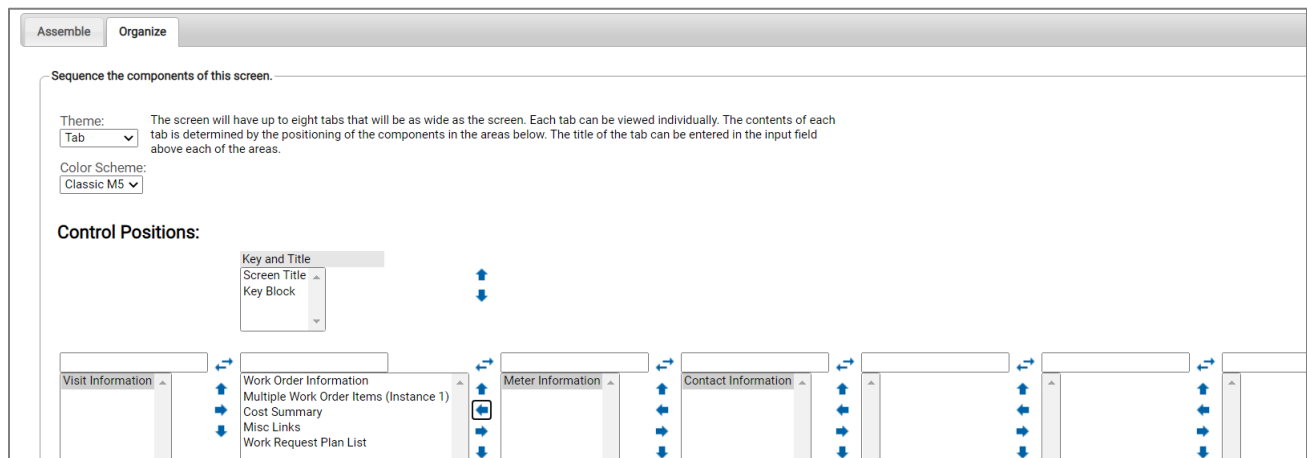
The left and right directional arrows permit the designer to move the panes from their current location to another one. This is also referred to as a *Pane Swapper*. This only makes sense if the pane contains data that is narrow when displayed. Hovering the mouse over the directional arrows provides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

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



Tab

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

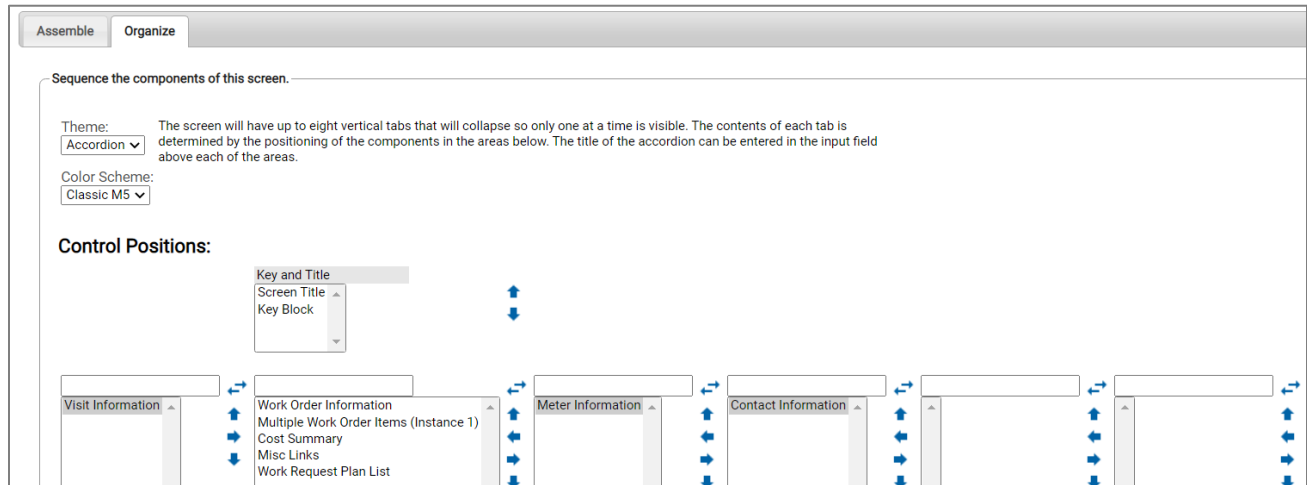


To add a title to the tab, enter the information in the blank space above each tabbed area. The title can contain up to 20 alphanumeric characters.

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

Accordion

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



Color Scheme

The **Color Scheme** options are *Classic M5* and *Portal*.

Classic M5 – Displays a faint border around each control.

Portal – The portal design does not display a border.

Control Arrangement

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

4. Preview Mode

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

The screenshot displays the 'Screen Designer' application interface. At the top, there is a toolbar with buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', 'ATTACH', and 'RELATED'. Below the toolbar, the 'Screen Designer' title is followed by a 'General Information' section. This section contains two columns of input fields: 'Screen Name' (containing 'NEW WORK ORDER MAIN'), 'Description' (containing 'NEW WO MAIN'), 'Allow User Customization' (set to 'No'), and 'Foundation' (set to 'Work Order'). Below this is a horizontal bar with 'Assemble' and 'Organize' tabs. A 'Mode' section features three radio buttons: 'Fabrication', 'Preview (shortcut key = ALTR)' (which is selected), and 'Arrange'. The main area is titled 'Screen Preview' and shows a preview of a 'Work Order Filter' component. This component includes a 'Work Order Search' section with a checkbox for 'Show Closed Work Order(s) Since 03/22/2020:' and a text input field for 'Unit/Department/Component or Work Order Number:'. At the bottom of the preview area, there is a 'Work Order Information' section.

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

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

Menu Maintenance

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

Updates

Release	Section	Description
23.2	All sections	Applied miscellaneous writing style updates throughout the document.
24.1	Visit Information	Added new image with Work Order Signature as an Attribute.
24.3	Work Order Information	Added new Owning and Using Departments Attribute.
24.3	Cost Summary	Added new Work Order Limit Popup as an Attribute.
24.4	Cost Summary (Wide)	Added new Work Order Limit Popup as an Attribute.