User's Guide

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ExpressMaintenance 9.1

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Quick Links

Chapter I
1 Quick Links

ExpressMaintenance is a multi-user application that allows a system administrator to define user access and permissions. You may not have access or links to all areas of the program covered in this help system.

1.1 Installation and Setup

How do I install the software and database engine?

How do you setup client workstations?

How do I get updates and new releases?

How can I transfer everything to our server after evaluating?

How do I obtain technical support?

FAQ - Tech Bulletins on the Web

1.2 Where To Start

Where is the best place to start?

How do I navigate around in the program?

How is data entered and maintained?

How do I generate reports?
How do I disable the US data formats?

How do I obtain Technical Support?

1.3 Administration

What is the purpose of the Administration section?

Where do I enter my company information?

How do I enter vendors and manufacturers?

Can I setup users with different permissions?

Where do I enter different sites or locations?

Where do I change the codes such as types, categories, etc?

Where do I setup my various PMs and services?

Can I setup to email Work Orders and POs to people?

1.4 Parts Inventory

How are parts used in ExpressMaintenance?

What items effect the parts inventory?

How do you enter and manage parts data?

How can I duplicate a part?

What about parts reports?

What about parts reordering?

Can I use and print barcodes?

1.5 Equipment Maintenance

Give me an overview of how the PMs system works.

Where do I enter and maintain equipment data?

How do I enter scheduled services (PMs) for equipment?
How do I view scheduled services for work order generation?

How do services get into the service history?

Can I insert pictures of my equipment?

What equipment maintenance reports are available?

How can I duplicate a unit for identical items?

Can I just inherit services from one unit to another?

Can I associate parts with my services (PMs)?

Can I attach other documents to equipment?

Can I use and print barcodes?

1.6 Maintenance Requests

What is ExpressRequest?

How do I purchase ExpressRequest?

How do I create work orders from user requests?

How do I distribute ExpressRequest to other users?

1.7 Work Orders

How do I create work orders from services (PMs)?

How do I create work orders from user requests?

How do I create work orders for un-scheduled services?

What is the best way to search and review work orders?

How are work orders completed?

What about printing work orders?

What about printing work order reports?

How do work orders affect parts inventory?
1.8 Purchase Orders

Where do I enter purchase orders?

How do I print purchase orders?

How do I receive parts and close purchase orders?

How can I close purchase orders without receiving parts?

Where do I setup my vendors for purchase orders?

Where do I setup parts to be selected for purchase orders?

What about printing purchase order reports?

1.9 Ordering

After evaluating ExpressMaintenance & ExpressRequest, you will want to own these exciting maintenance management tools. We do accept all major credit cards plus purchase orders from organizations subject to our approval.

Ordering is easy...

Simply go to our website to print and fax the order form: http://www.expresstechnology.com/ordering

Phone:
251-929-3200

Fax
251-929-3211

Mail
Express Technology Inc.
8100 Falcon Blvd
1.10 Frequently Asked Questions

Get Answers Instantly!

Visit our Knowledge Base to obtain answers quickly. You'll find answers with detailed steps to assist you. Plus, you can always contact our tech support department.

Go There Now - KnowledgeBase
Installation

Chapter II
2 Installation

ExpressMaintenance can be installed as a standalone or network multi-user application. Because technology is constantly changing, installation instructions are not included in the program help system. Please refer to our website www.ExpressTechnology.com for complete up to date installation instructions under our Knowledge Base section.

If you or your technician need any assistance installing Express Technology software please do not hesitate to contact our support staff. We are here to assist you and to insure that you get off to a great start. The fastest and most effective way to obtain support is to email us at support@ExpressTechnology.com. ExpressMaintenance can be installed as a standalone or network multi-user application. Because technology is constantly changing, installation instructions are not included in the program help system. Please refer to our website www.ExpressTechnology.com for complete up to date installation instructions under our Knowledge Base section.

If you or your technician need any assistance installing Express Technology software please do not hesitate to contact our support staff. We are here to assist you and to insure that you get off to a great start. The fastest and most effective way to obtain support is to email us at support@ExpressTechnology.com.

2.1 Installing Software

If you ordered an installation CD from Express Technology, it will include all of the files you need to install ExpressMaintenance and ExpressRequest. You can also download the installation files from our website.

Because technology is constantly changing, installation instructions are not included in the program help system or User's Guide. Please refer to our website www.ExpressTechnology.com for complete up to date installation instructions under our Knowledge Base section.

If you need further assistance please email our support department at support@ExpressTechnology.com.

2.2 Workstation Setup

Network vs. Standalone Computing Environments
Express Technology software may be installed into a Network or Standalone computer environments.
**Standalone**
The Standalone environment consists of a situation where the application runs on a single computer. This computer works as the Server and the Client by processing the application and maintaining all data. Since a Standalone computer does handle all data and the application, it should be a reasonably fast computer with adequate memory, processing speed and disk space. In this environment, you simply need to install the database engine and application on the standalone computer.

**Network With Server & Client Workstations**
The Network environment is made up of two or more computers. These computers communicate with each other, share resources and, in some cases, control other computers over the network. Express Technology uses the Client / Server model in a Network environment. The Client / Server model is comprised of a computer that acts as a Server to one or more computers over the network. The Server houses data and handles data requests from Client computers. Clients (Workstations) are the computers that manipulate the data sent to and from the Server. These computers run independent of the Server in all respects other than to request and send data.

In this environment, you need to install the database engine and application on the Server Only. Each network workstation that will access and run the application is setup with a simple shortcut as outlined below.

**Client Workstation Setup (Networks)**
To run the applications from a client workstation, you need to have the ExpressTech folder on the server shared with read / write permission. In addition, you must have TCP/IP installed on the server (usually installed automatically by windows). Test run *ExpressMaintenance* at the server to insure the communication is working between the program and the database engine before proceeding to the workstations.

Once you are sure that the server computer is setup according to the guidelines above, proceed to the client workstations. Create a shortcut on the workstation pointing to the Maintenance.exe file on the server in the Express Tech folder.

*ExpressMaintenance* uses a file by the name of ExpressMaintenance.ini. The ExpressMaintenance.ini file must reside in the folder with Maintenance.exe and must contain the following:

```
[Connection Info]
SQLServer=ActualSQLServerName
SQLDatabase=ExpressMaintenance
```

The ini file is best edited using the Notepad text editor. Notice the space in "Connection
Info". Also, make sure this file is in the folder with Maintenance.exe. Give users read permission to ExpressMaintenance.ini.

Test first at the server and make sure everything works correctly. You can use the option under Administration / Databases & Connections to create and view the ExpressMaintenance.ini file.

Next, make sure the workstation shortcuts point to the same Maintenance.exe in the same folder where you tested at the server.

The file can contain another line to prevent or force the use of Windows login. For details on using or disabling the Windows login - see our website knowledge base for more details.

The same applies to ExpressRequest. There must be an ExpressRequest.ini file with the same contents. In the current version, ExpressMaintenance & ExpressRequest only use the two ini files and no other ini files are required. No ini files are used on the workstations.

In some network environments, it might be that the workstations require several seconds or even a minute to find and connect to the SQL Server. By default, ExpressMaintenance only allows 15 seconds to make the SQL Server connection. You can increase the timeout allowance by adding the following line to the ExpressMaintenance.ini file. The example below increases the allowed time to make the connection to 60 seconds.

[Connection Info]
SQLServer=ActualSQLServerName
SQLDatabase=ExpressMaintenance
SQLTimeout=60

If you are having trouble connecting from a workstation, make sure the ExpressMaintenance.ini file is setup as outlined above and the user has permission to read the file. Also, increase the timeout setting to allow for slower network connections.

In the unlikely event the problem persist and you have checked the items above, the problem is a permission issue with the workstation logging into the SQL Server. You can test this from the workstation using Windows and ODBC as outlined below.

**Creating ODBC DSN**

You can test a computer's connectivity to the SQL Server and force a TCP/IP connection to the server by creating an ODBC Data Source. On some computers (especially Windows 98), it is necessary to force a manual TCP/IP connection one time to activate the SQL communications. Try creating and testing an ODBC / DSN to ExpressMaintenance by following the steps below:

1. Click on Windows / Start / Control Panel
2. Double Click on Administrative Tools (Note: some versions of windows, do not require this step)
3. Double Click on Data Sources (ODBC)
4. Click the System DSN tab
5. Click the Add Button
6. Scroll to the bottom of the driver list and click SQL Server
7. Click the Finish button
8. Type ExpressMaintenance in the Name & Description fields
9. In the Server field, type the name of the SQL Server or the IP address if the IP is permanent
10. Click the Next button
11. Click the "With SQL Server authentication ..." option
12. Click the Client Configuration button
13. Click TCP/IP option for the network library
14. Make sure the Server Alias and Server Name fields have the IP address of your server
15. Click the Ok button
16. Click the "Connect to SQL server to obtain..." option
17. Enter "sa" (no quotes) for the user name,
18. Use the password of 'welcome' unless you assigned another password for 'sa' during installation
19. Click the Next button
20. Click on "Change the default database to:..." option
21. Click the Database drop down list and select ExpressMaintenance
22. Click the Next button
23. Click the Finish button
24. Type ExpressMaintenance in the Name & Description fields
25. In the Server field, type the name of the SQL Server or the IP address if the IP is permanent
26. Click the Next button
27. Click the Test Data Source button
28. Note the results
29. Repeat the process except in steps 16 & 17 use the login of 'etuser' with a password of 'etrik22'
30. Note: You can also try connecting to the "Master" database in step 21
31. Note the results

If the above process does not allow you to successfully connect to the server / database, the problem is in your network and is most likely a permission issue. Please consult your IT department or contact us for more assistance.

2.3 After Installation

ExpressMaintenance & ExpressRequest include comprehensive help systems to assist you. The help systems utilize the Microsoft HTML help system which provides many handy features including an index and full text searching capabilities. The first thing you should do is click on the Help button at the top of ExpressMaintenance and take a few minutes to review the help file topics.

We suggest you begin with the "Quick Links" section. You will then want to review the various screens of ExpressMaintenance and then begin entering data. You will also want to take a look at the "Getting Started" section.

Printing A Manual

A printable version of the help system (User's Guide) is available in Adobe Acrobat (pdf) format. You can obtain the pdf file from the CD or from the Updates or Downloads pages of our website at www.ExpressTechnology.com. This User's Guide is also on the Express

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Files Required

ExpressMaintenance requires the following files to operate. This does not include any files associated with the installation and initial database setup. This strictly relates program files and their support files.

*Maintenance.exe* - The main executable program for ExpressMaintenance. This file should be placed in a single location on the computer designated to function as the application server. Requires Read permission only.

*ExpressMaintenance.ini* - The text file used by ExpressMaintenance to determine the server and database connection properties. This file should reside in the same folder with Maintenance.exe. This file can optionally reside in a different folder provided that folder is specified in the Start In property of the Maintenance.exe shortcut. Requires Read permission only.

*ExpressMaintenance.naf* - The network access file used by ExpressMaintenance to determine the licensing and concurrent users. This file should reside in the same folder with Maintenance.exe. This file can optionally reside in a different folder provided that folder is specified in the ExpressMaintenance defaults data under Administration / Defaults / Data Formatting Defaults. All users must have full permission to this file. Requires Read & Write permission.

*ExpressRequest.exe* - The main executable program for Express Request. This file should be placed in a single location on the computer designated to function as the application server. This file is not required if you have not purchased a license to Express Request. Requires Read permission only.

*ExpressRequest.ini* - The text file used by ExpressRequest to determine the server and database connection properties. This file should reside in the same folder with ExpressRequest.exe. This file can optionally reside in a different folder provided that folder is specified in the Start In property of the ExpressRequest.exe shortcut. This file is not required if you have not purchased a license to ExpressRequest. Requires Read permission only.

Other Files

*ExpressMaintenance.xsql* - This file contains the SQL scripts to create a new ExpressMaintenance database including all tables and initial setup data. This file is not required for the program operation as it is used just to create a database initially.
ExpressMaintenance.xrtm - This file contains all of the ExpressMaintenance report templates. This file is not required for the program operation as it is used just to import the initial reports when the database is first created.

2.5 Distributing ExpressRequest

What is ExpressRequest
If you have purchased a copy of ExpressRequest, you can provide users with a short cut to ExpressRequest.exe. This program allows non-maintenance users to enter maintenance requests in a simple easy to use screen or via an internet web page. Users do not necessarily have to know the unit name or proper service to provide. They can simply enter a description of the equipment and service needed or problem. A separate help file system is included with ExpressRequest.

ExpressRequest Defaults
There are a few default settings for ExpressRequest which are located in ExpressMaintenance. You can access these settings under Administration / Defaults / ExpressRequest Defaults. See that section of the help for more details.

Distributing ExpressRequest
Like ExpressMaintenance, you do not actually distribute ExpressRequest. You create shortcuts to the application.

1. Server Setup
1. Install and make sure ExpressMaintenance runs properly.
2. Install and make sure ExpressRequest runs properly.
3. Click on the Setup button and set the values as desired.
4. Leave the Requester Name blank.
5. Save the setup savings for ExpressRequest.
6. Exit ExpressRequest.

2. Client Workstation Setup
1. Go to the client workstation
2. Use the windows explorer to locate the server drive and the \ExpressTech folder.
3. Right click on the ExpressRequest.exe file and click copy.
4. Right click on the client workstation desktop and click Paste Shortcut.
5. Run ExpressRequest from the shortcut.

Using A Web Interface
Because ExpressMaintenance and ExpressRequest are based on Microsoft SQL Server as the database engine, you can also allow users to input requests via a web page. This can be setup on your own WAN or via the internet. The SQL Server computer must be on the network. Sample files are included in the installation for your reference (eRequests.asp,
eRequestsOk.asp, eRequestsErr.asp).

**ExpressRequest Help File**
Make sure the ExpressRequest.chm file is located in the same folder with ExpressRequest.exe. This will insure users can run the help file from within the ExpressRequest application.

For the most current information, check the Technical Bulletins (FAQ) at our web site at: http://www.expresstechnology.com/support/knowledge-base.

### 2.6 Technical Support

At Express Technology we are committed to making sure your experience with ExpressMaintenance is pleasurable. We work hard to provide comprehensive Tech Bulletins for frequently asked questions (FAQ) in addition to providing prompt support answers.

Before contacting Express Technology for technical support, please take the time to carefully search the on-line help for a possible explanation. Make sure that you are asking a specific question about the Express Technology application instead of general Windows or computer use questions that might be appropriate for your IT department or local hardware dealer. If you are having a problem, please take the time to test the problem a couple of times to ensure consistency and a complete understanding of what is occurring.

Our web site contains a designated page for submitting support issues. Please prepare your support questions in a manner that is specific and detailed. Please be specific about the module, screen name and other particulars. These steps will allow us to more promptly replicate the problem or address your question.

For the most current information, check the knowledge base (FAQ) at our web site at: http://www.expresstechnology.com/support/knowledgebase.

Please submit support questions using the support page of our web site at: http://www.expresstechnology.com/support/submitsupport.

Email: support@ExpressTechnology.com
Phone: 251.929-3200
Fax: 251.929-3211

### 2.7 Updates & Releases

New updates or program releases are placed on our web site. Users are usually notified via
email when a new release or update is available. **You should always download new releases in order to stay up to date with the latest version.**

Effective in version 8.2.9.3, ExpressMaintenance includes an option under Utilities / Check Updates that allows users to check our website for an available update. Click on Check Updates and see if you are running the latest release. If you have entered your Express Tech customer number under Admin / General Information, the function will also verify your status under the Annual Software Maintenance Plan. If your plan is current, the update password will be provided. If you do not have your customer number, email support@ExpressTechnology.com to obtain.

You only need to run the latest update to become completely current. All prior updates or changes to the database will be included in the latest update.

You can view / download the latest updates from the ExpressMaintenance Updates Page.

Detailed instruction on downloading and installing updates is available at: Update Info.

**Release Notes**

You can also find release notes on each new version by clicking on the Website button from the main menu of ExpressMaintenance.

**Version**

Your software version is always displayed in the lower left corner of the program screen. It is a good idea to state the version when submitting issues to tech support.

For the most current information, check the knowledge base (FAQ) at our web site at: http://www.expresstechnology.com/knowledgebase.

### 2.8 Transferring Data

**Moving The Application & Data**

Because technology is constantly changing, some installation instructions are not included in the program help system. Please refer to our website www.ExpressTechnology.com for complete up to date information on transferring the application and data under our Knowledge Base section.

**Registration Data**

The serial number and registration code will be restored when the data is restored. If you have lost the original data, you must email support@ExpressTechnology.com with the new serial number and a your company name. A new registration code will be issued and emailed to you.

For the most current information, check the Technical Bulletins (FAQ) at our web site at:
2.9 Client/Server

This section explains the concept of client / server setup. To view detailed instructions on how to setup ExpressMaintenance on a network or how to setup client workstations, view the Workstation Setup topic.

Express Technology software products are designed for multi-user environments using the Client / Server model and SQL. This provides for optimal performance and solid data integrity. With Express Technology software, you will not spend your time rebuilding index files or inputting loss data because of the Microsoft Database Engine (MSDE) and Microsoft SQL Server.

The Client / Server model is comprised of a computer that acts as a Server to one or more computers over the network. The Server houses and controls the flow of data. It also handles the requests received from Client computers. Clients (Workstations) are the computers that manipulate the data sent from the Server. These computers run independent of the Server in all respects other than to request and send data.

One advantage to the Client/Server model is that all data is stored on a single Server. This prevents data corruption and maintains data integrity. Another advantage is that the Client computers actually run the programs, which make calls to the Server for data. This distributes the program processing among the Client computers.

In a small network environment (i.e. 2 - 5 computers) the Server can actually be a Client as well as the Server. This simply means that users can run the application directly from the Server. As the network grows however, it will become necessary to let the Server be reserved for processing data requests and therefore be a designed server in order to maintain satisfactory performance.

The following diagram demonstrates the concept of Client / Server configuration:
2.10 SQL Server

Express Technology Inc. software is designed to use Microsoft® SQL Server (all versions) for its database engine. Smaller companies can use the ExpressEdition (MSDE) which is a scaled down version of SQL Server. Larger companies may desire or already have the complete SQL Server program. The following information about SQL is provided by Microsoft Corporation.

Microsoft® SQL Server™ is designed to be a client/server system. Client / Server systems are constructed so that the database can reside on a central computer, known as a server, and be shared among several users. When users want to access the data in SQL Server, they run an application on their local computer, known as a client, that connects over a network to the server running SQL Server.

Having data stored and managed in a central location offers several advantages:
- Each data item is stored in a central location where all users can work with it.
- Separate copies of the item are not stored on each client, which eliminates problems with users having to ensure they are all working with the same information.
- Business and security rules can be defined one time on the server and enforced equally among all users.
- A relational database server optimizes network traffic by returning only the data an application needs. For example, if an application working with a file server needs to display a list of the
names of salesmen in Oregon, it must retrieve the entire employee file.

- Hardware costs can be minimized.
- Because the data is not stored on each client, clients do not have to dedicate disk space to storing data. The clients also do not need the processing capacity to manage data locally, and the server does not need to dedicate processing power to displaying data.
- The server can be configured to optimize the disk I/O capacities needed to retrieve data, and clients can be configured to optimize the formatting and display of data retrieved from the server.
- The server can be stored in a relatively secure location and equipped with devices such as an Uninterruptible Power Supply (UPS) more economically than fully protecting each client.
- Maintenance tasks such as backing up and restoring data are simplified because they can focus on the central server.

In large Client / Server systems, thousands of users may be connected to a SQL Server at the same time. SQL Server has full protection for these environments, with safeguards that prevent problems such as having multiple users trying to update the same piece of data at the same time. SQL Server also effectively allocates the available resources, such as memory, network bandwidth, and disk I/O, among the multiple users.

SQL Server applications can run on the same computer as SQL Server. The application connects to SQL Server using Windows Interprocess Communications (IPC) components, such as shared memory, instead of a network. This lets SQL Server be used on small systems where an application needs to store its data locally.

While SQL Server works very effectively as a server, it can also be used in applications that need a stand-alone database stored locally on the client. SQL Server can dynamically configure itself to run efficiently with the resources available on a client without the need to dedicate a database administrator to each client.

### 2.11 Operating Systems

Because technology is constantly changing, system requirements are not included in the program help system. Please refer to our website [www.ExpressTechnology.com](http://www.ExpressTechnology.com) for complete up to date system requirements under our Knowledge Base section.

If you or your technician need any assistance installing Express Technology software please do not hesitate to contact our support staff. We are here to assist you and to insure that you get off to a great start. The fastest and most effective way to obtain support is to email us at support@ExpressTechnology.com.

For the most current information, check the **Technical Bulletins (FAQ)** at our web site at: [http://expresstechnology.com/knowledgebase/](http://expresstechnology.com/knowledgebase/).
Chapter III

Getting Started/Overview
3  Getting Started/Overview

ExpressMaintenance®
The way maintenance should be!

ExpressMaintenance and ExpressRequest are easy to use applications that offers a world of benefits to your organization and its employees. You will find it quite easy to navigate around ExpressMaintenance. However, it is recommended that you review this section to get a quick understanding of the way this application works.

When you are ready, take a look at the Entering Data to begin applying ExpressMaintenance for your maintenance management.

- Getting around in the program using the Main Toolbar.
- Entering and maintaining data with the Data Navigator.
- Using the Data Grids in some screens.
- Selecting from picklists with the Lookup Combos.
- Entering Notes in certain screens.
- How to finds record using Search options.
- How to find records using the Filter & Group options.
- Using the Print Button on some screens.
- Printing Reports in the report screens.
- Designing and Customizing Reports.
- Getting starting with setup Data Entry.

3.1  Logging In

ExpressMaintenance is a multi-user client / server application. It is designed to handle a large number of concurrent users at one time. Users login accounts are setup under Administration / Employees / Security Settings along with a password.

Login names and passwords are case sensitive. If when logging in, you receive an invalid name or password error, check with your system administrator for the correct login name and password.

Log In to Database (DB) - This header will tell the user what database they are logging into.
If when logging into ExpressMaintenance, you receive an SQL connection error, check with your system administrator or check our our website.

### 3.2 Main Toolbar

The Main Toolbar which appears across the top of the application, allows you access to the various area of *ExpressMaintenance*. To access the toolbar options, click on the tab of the general areas (example: Maintenance) and then locate the toolbar for the specific area (example: Equipment).

The Main Toolbar allows you to have any number of screens open at the same time. Below is an example of the Main Toolbar the Maintenance / Equipment highlighted.

Each option reflected on the Main Toolbar is covered under separate help topics.

**Note:** ExpressMaintenance is a multi-user application that allows a system administrator to define user access and permissions. You may not have access or links to all areas of the program covered in this help system or reflected in screen shots.

### 3.3 Data Navigator

The Data Navigator provides users a very powerful control for navigating through and manipulating records in a table. Data records may be displayed in a grid or single record format. The data navigator consists of a series of buttons that enable you to scroll forward or backward through records one at a time, go to the first record, go to
the last record, insert a new record, update an existing record, post data changes, cancel data changes, delete a record, and search a record.

The following figure shows the Data Navigator for the Units (Equipment) screen. Depending on the module and task to be performed some options may not appear or be highlighted if its function is not applicable at the time. Some buttons shown below are not applicable for other data screens.

Below you will see some descriptions of the functions with the data navigator.

- **First Record** - Jump to the first record in the search.
- **Previous / Next Record** - Move through the records one at a time in numerical order.
- **Last Record** - Click to jump the last record in the search.
- **Insert Record** - This button will open the Work Order Data window to insert a new record.
- **Delete Record** - Delete the selected record. ExpressMaintenance will promote you to confirm if you want to delete.
- **Post Edits** - This check box will light up if you have made any changes to a record.
- **Cancel Edits** - Similar to the post check this option will light up when changes have been made. This option will cancel any changes that have been made.
- **Refresh** - Refresh current data. Refresh can be used if you have made any edits to any new or existing records.
- **Filter Data** - This feature is new in EM version9. Filter data gives the user the ability to search, group, and filter data.
- **Total Records** - Total number of record in the search.
- **Show / Hide Search Options** - Show or Hide the search, group, or filter options.
- **Selection Options** - Flag, Search, or View are some of the selection option in ExpressMaintenance.
- **Calendar View** - Click to view in WO's and Services in your own personal calendar or the company shared calendar.
- **Jump to Unit** -
- **View POs** - View the Purchase Order for any Service (PM) or Work Order
- **Print** - Print will allow you to print a individual record or a list of records.
- **Email** - Email a selected record or a list of records
- **Help** - View help options on the web or in PDF form.
3.4 Data View

Many of the records in ExpressMaintenace have the option to click and view each record in the data view tab.

**Note:** Data View can also be viewed by double clicking each record to open in a new window.

Manage your employees by editing information in the data view tab.
3.5 Data Properties

A grid component enables you to view and edit records from a table in a table grid format, also known as rows and columns. Generally a grid is associated with a Data Navigator. The following is a sample Cost Centers grid from the Administration Module.
Arranging Columns (Grid Properties)
The easiest way to arrange grid columns is to left click on the column heading and drag the column to the desired position. However, you can also click on the Grid Properties button in the upper left corner of the Grid. The Grid Properties window allows you to define which columns will be displayed, the order, width and column titles.
Sorting Records

Many grids allow you to instantly change the sort order of the records by clicking on the title above the column on which you want to sort. Clicking the column button a second time will sort the records by that column in descending order as opposed to ascending order.

Inserting & Editing Records

In addition to using the Data Navigator, the following key strokes perform special tasks within a grid.

CTRL-DEL -- deletes the current record.

ESC -- cancels all edits for a record.

INSERT -- Inserts a new empty record.

A grid field may also automatically display a combo box drop-down button when a cell of that column is in edit mode. The drop-down list is populated with lookup values defined in a setup screen.
A grid field can also display a pick list that looks and operates like a lookup list column, except that the column’s field is a normal field and the drop-down list is populated with a list of fixed values defined at design time instead of lookup table values defined by the user in a setup screen.

When a user edits a record in the grid, changes to each field are not posted to the table until the user moves to a different record in the grid or clicks the post button. When a record is posted, if there is a problem updating any fields that contain modified data, an error occurs and the data is not modified.

### 3.6 Lookup Combos

Lookup combos allow users a quick method of selecting data to be entered in a field. To enter a combo, simply click on the arrow or ellipse buttons and the available choices will be displayed.

When applicable, you can simply start typing text and the choices will appear and the cursor will automatically quick position to the nearest matching record. See example below:
In most cases, you can add to the data in the selection list combo. To add data, click on Navigate / Administration and locate the codes or setup screen applicable to the selection list. For example, to add more vendors or leasing companies, go to the Companies setup screen under Administration.

You can define the layout of the Parts and Units lookup lists. This is handled under utilities / Set Lookup Lists.

3.7 Notes

Notes fields are found throughout the program in various data entry screens. You may type directly in the notes field or you can right click to open the memo editing screen. All notes fields support full rich text formatting which allows you to paste from Word and other popular programs. You can format text, insert bullets and insert graphics.

The Express Technology Report Builder also supports printing notes / rich text fields. You can auto size the band to adjust to the size of the memo notes. This allows users to create very attractive reports and forms with full information.

Right click on any notes field to expand the editor wheel (See Below).
Left click any of the options on the editor wheel to complete the function.

Check Size - Check the size of the notes currently in the field. Example Below

![Check Size Example](image)

Print - Click to view print options within the notes field
Cut - Copy and remove notes from the note field.
Paste - Select and Paste Notes in the current note field.
Copy - Select and copy notes from inside the notes field
Select All - Select everything is the notes field
Editor - This will open an expanded editor similar to Microsoft Word.

3.8 Search, Filter, Group, & Find

ExpressMaintenance can contain many records and therefore searching can be difficult. Search, filter, and group options will make searching your database much easier and get be found throughout the data entry screens.

Filter Data will hide or expand the three search options. Below is a description of the
three search functions:

- **Search** - Use the search bar just below the table header to type a keyword, location, etc. Click on the data grids to expand your table options.
- **Filter** - Build a custom filter to help quickly search a large database. Add new groups and create new conditions.
- **Group** - Use your table and data grid to customize your search by simply dragging and dropping your table headers.
- **Find** - Using the find function to search the entire grid. There are two ways to access the find function.
- **Filter Builder** - Filter builder gives details of your current filter. You can also edit your current filter in this window.

3.8.1 **Search**

The Search button is found throughout the data entry screens. By clicking Search you can search for any name, number or amount pertaining to each module without closing the screen.

To use, simply click Search, choose which field you wish to "Search", and enter the search “Value” and then click the Search button or press Enter.
3.8.2 Filter

By building a filter you can quickly narrow down the number of records you are searching.

The filter in ExpressMaintenance gives many different options for customizing and building your filter.

Clicking the filter data button will display your filter options.

Customize your table by clicking the data grids button and selecting your headers.

Below is a list of some of the options listed in Data Properties.
By clicking the button you will see all of the filter options.

For example if I want to filter anything that contains fish I would use the and type in “fish”.
Editing your Filter

If you have created a filter and want to edit the filter you have several options.

Clear Filter - Click the button to clear the current filter.

Hide Filter - By clicking the you hide the current filter.

Filter History - ExpressMaintenace keeps a filter history. Click the button to recall your previous filter history.

3.8.3 Group

Grouping records by table header is a quick search option. Simply click and drag the header into the grouping box. You can also sub-group by other column headers.

Grouping will create a list using the selected group and sub-group headers.
Editing Group Search

To edit your group simply right click in the grouping box at the top of the screen.

Expand and Collapse - This will change the view of your group list.
Clear Grouping - To clear your entire group search select clear grouping.
3.8.4 Find

ExpressMaintenance also have a find function with in the program.

How to access the find function:

- Right click a table header and select find panel. You should see a find panel appear at the top of the screen.

- Ctrl+F is the second way to use the find panel.

The find function will search the entire database. You can search a single letter or an entire work.

Note: You do not have to enter a percent sign in front or behind your find.

3.8.5 Filter Builder

The filter builder will detail your current filter and allow your to customize or edit the filter.
To open the filter builder click the **Customize** button.

After you click the **Customize** you will see a lot of options to edit your filter.
3.9 Print Button

You will find the print button throughout the program in various screens. It allows you to print a transaction or list without leaving a particular screen. Reports are found in individual Modules and offer a variety of reports as well as access to the report designer.

The printer icon has a drop down arrow that gives the user several different print options.
**Unit List by Type** - This option prints unit by type with note included

**Unit List by Category** - Print the unit by the category of the record

**Print Unit Data Sheet** - Print the record data sheet with images and notes

As with all buttons in *ExpressMaintenance*, hints will appear when the mouse is positioned directly on the button. Single click to activate the button command.

**See Also:**
- Reporting
- Data Navigator

### 3.10 Reporting

Each module of *ExpressMaintenance* contains a Reports window for accessing available reports. These windows will contain a left panel which provides for various parameters to be passed to the report. The right panel lists the available reports. To run a report, simply complete the parameters in the left panel and then click on the desired report from the right panel. Below is a sample taken from the Maintenance / Reports window:
Filters
Report filters are optionally selected in the left panel. When the report is selected, the filters are passed to the applicable field if that field exist in the report. If the field does not exist in the report, the filter is ignored. When designing custom reports, users often want to add filters and have those filters remain permanent. For example, you may have a report of all Units of a certain type. See explanation below for details.

How can I prevent report filters from clearing when the report runs?
Answer: ExpressMaintenance automatically clears all report filters when a new report runs. This is to prevent unexpected results from previously saved filters. There are two exceptions to this rule.

1. New report filters are created based on report parameters selected before running the report.
2. Report filters on fields where the filter is of the Auto Search type and not set to Mandatory.

If you would like to create a permanent filter that is to remain when a report is saved, you can easily do this. Simply do the following:

1. Run the report
2. Click on the Data tab
3. Click on the table Search button
4. In the upper panel, double click on the desired field to add to the bottom panel.
5. In the lower panel, select the search criteria
6. Uncheck Auto Search if checked
7. Check Mandatory
8. Click Ok to complete
9. Save the report upon closing it.

When the report runs, all filters will be first cleared except those that are checked as Mandatory and not Auto Search.

**Favorites**
To assign a report as a Favorite, simply right click on the report and select "Add to favorites". Favorites are assigned on a per user / per module basis. If favorites have been selected, then the user will see the favorites tab first upon selecting the reports window. With the availability of the Report Designer, a particular module may become crowded with user created reports. Favorites is a convenient way of limiting the view of available reports to those most often used.

All reports can be view in a preview mode:

![Report Builder: New Report](image)

**Designing Reports**
Every report in ExpressMaintenance & ExpressRequest was designed with the built-in Report Builder. Users have the full ability to change or design new reports. When viewing a report, click on the Design tab to customize the report. For full details and help on the Express Technology Report Builder, please run the help within the report builder.

### 3.11 Entering Data

To get started with *ExpressMaintenance*, you must begin by entering certain data to
properly setup the maintenance system. You should review each topic under Administration and then proceed with entering setup data to meet your organization needs. Much of the setup data will already be entered for you. However, a quick review of the sections under Administration will help you know where to go if you need to enter additional items.

The options under the Administration Menu are listed in alphabetical order. However, it is recommended that you enter setup data in the following order (though not required by any means). Keep in mind that you can return to any of these screens to enter additional data at any time.

**General Setup**
- Registration - Enter your Serial Number and Registration Code to activate ExpressMaintenance permanently.
- Defaults - Minimum data entry. Company name, preferences, etc.
- Users - Enter each user along with access permissions.
- Employees - Enter each employee who might be assigned a work order (mechanics) or who may create a purchase order.
- Codes - Many of the selection codes for ExpressMaintenance are found under the Codes setup screen.
- Sites / Locations - Offers the ability to separate equipment and parts based on sites and / or locations as you define.

**Services Setup**
- Cost Center - Setup cost centers or ATA Codes to be applied to services performed and parts used.
- Services - Enter each type of service that will be used. Include pertinent notes and safety data.

**Units Related Setup**
- Codes - Most of the Unit codes are found under Codes setup. These include types, makes, category, sizes, pressures, etc.

**Vendor Related Setup**
- Vendor Terms - Terms that may be offered by vendors (suppliers). Most terms are already entered for you.
- Companies - Vendors and supplier records as well as customer records if you bill for services. You must enter this data yourself.

### 3.12 Importing Data

Many users purchase ExpressMaintenance after having used other maintenance management software. You can save a large amount of data entry time by importing data
from other applications. ExpressMaintenance has a special utility for accomplishing this that is available for fee to licensed users. Importing is rather easy and can be a real time saver.

To obtain complete details on importing data into ExpressMaintenance, please visit our website and review the Technical Bulletins for the applicable topic. By maintaining this information on the website rather than the help file, we are able to adjust and keep this information completely current.

For the most current information, check the Technical Bulletins (FAQ) at our web site at: http://expresstechnology.com/knowledgebase/.
File

Chapter IV
4  File

Enter topic text here.

4.1  Application Options

The Application Options section is used to access preferences and connection information. Application Options section should be limited to the applicable authorized users.

This section will be used for setting up user preferences. The connection information will be used most often for troubleshooting.

The Application Options Menu is where you will adjust any user preferences enter the setup data needed for ExpressMaintenance. The options under the Administration Menu are listed in alphabetical order. However, it is recommended that you enter setup data in the following order (though not required by any means). Keep in mind that you can return to any of these screens to enter additional data at any time.

**Setup**
- View SQL Connection Info -
- Services - Enter each type of service that will be used. Include pertinent notes and safety data.
- Companies - Vendors and supplier records as well as customer records if you bill for services. You must enter this data yourself.
- Cost Centers - Setup cost centers or ATA Codes to be applied to services performed and parts used.
- Employees - Enter each employee who might be assigned a work order (mechanics) or who may create a purchase order.
- Vendor Terms - Terms that may be offered by vendors (suppliers). Most terms are already entered for you.
- Sites / Locations - Offers the ability to separate equipment and parts based on sites and / or locations as you define.
- Defaults - Minimum data entry. Company name, preferences, etc.
- Forms Setup - Define and point to files in a common folder to be used for general maintenance.
4.1.1 View SQL Connection

![Connection Information]

4.1.2 Application Preferences

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4.1.3 Normalize All Windows

4.1.4 Close All Forms
4.1.5 About
Administration

Chapter V
5 Administration

The Administration section is used to access various System Setup Screens. Access to the Administration section should be limited to the applicable authorized users.

Most of the initial setup is handled through Administration. In addition, your system administrator will use the Administration module to perform other administrative tasks from time to time. The following reflects the options available under the Administration module.

The Administration Menu is where you will enter the setup data needed for ExpressMaintenance. The options under the Administration Menu are listed in alphabetical order. However, it is recommended that you enter setup data in the following order (though not required by any means). Keep in mind that you can return to any of these screens to enter additional data at any time.

Setup
- **Codes** - Many of the selection codes for ExpressMaintenance are found under the Codes setup screen.
- **Services** - Enter each type of service that will be used. Include pertinent notes and safety data.
- **Companies** - Vendors and supplier records as well as customer records if you bill for services. You must enter this data yourself.
- **Cost Centers** - Setup cost centers or ATA Codes to be applied to services performed and parts used.
- **Employees** - Enter each employee who might be assigned a work order (mechanics) or who may create a purchase order.
- **Vendor Terms** - Terms that may be offered by vendors (suppliers). Most terms are already entered for you.
- **Sites / Locations** - Offers the ability to separate equipment and parts based on sites and / or locations as you define.
- **Defaults** - Minimum data entry. Company name, preferences, etc.
- **Forms Setup** - Define and point to files in a common folder to be used for general maintenance.
Manage
- **Reports** - Manage reports with options to create new reports, export, import, etc.
- **Requesters** - Define and manage requesters to be used in ExpressRequest.
- **Field Locks** - Define any required and non-editable fields for each table.
- **Registration** - Enter your Serial Number and Registration Code to activate ExpressMaintenance permanently.
- **User Accounts** - Enter each user along with access permissions.
- **Email Test** - Utility for testing the setup of email features of ExpressMaintenance.

Database
- **Backup & Restore** - Options for backing up and restoring your database.
- **Databases & Connections** - Dialog for creating new SQL databases as well as testing connections.
- **Rebuild Views** - Option to rebuild the SQL database views used by ExpressMaintenance.

5.1 Setup
Enter topic text here.

5.1.1 Configuration

*Access*
Administration / Configuration

*Explanation*
The Configuration screen should only be accessed by the system administrator. It is used to enter certain data about the company and how ExpressMaintenance is to operate.

The defaults screen is divided into several sections. Each covers the defaults for a particular area of the program
- **General Settings**
- **Security Settings**
- **Data Formatting**
- **Performance Settings**
- **Email Settings**
- **Companies**
- **Equipment (Units)**
- **Parts Inventory**
- **Purchase Orders**
- **Scheduling**
- **Work Orders**
- **Express Requests**
- **Mobile App Settings**
- **URL Links**
Note: All settings made under Configuration are system wide. You should limit access to Configuration and other Administrative function.

5.1.1.1 General Settings

Access
Administration / Setup / Configuration / General Settings

Explanation
General information about your company.
Company Name - Your company name as it should appear on reports, purchase orders, and work orders

Address, City, State, Postal Code - Your company address as it should appear on purchase orders and work orders.

Country - Your country as part of the address.

Phone Number - Your company phone number as it should appear on purchase orders and work orders.

Fax Number - Your company fax number as it should appear on purchase orders and work orders.

Customer Number - Your company fax number as it should appear on purchase orders and work orders.

5.1.1.2 Security Settings

Access
Administration / Setup / Configuration / General Settings

Explanation
This area is to change password settings and change user log in information
Password Length - Use the to adjust password length. Minimum length is 5 charters (20 Max.)

Password Requirements - ExpressMaintenance allows you to set up several different password requirements. Uppercase and Number, Uppercase only, and any character are the default options for password requirement.

Password Change - Change the number of day before the current password expires.

Log User Activity -

Purge Log Items Days -

5.1.1.3 Data Formatting

Access
Administration / Setup / Configuration / Data Formatting

Explanation
Set your preferences about how data will be automatically formatted.
ExpressMaintenance includes edit masks on certain fields. Edit masks make data entry easier and faster assuming in certain conditions. Edit Masks are available for standard US field formats such as states, zip codes, and phone numbers. You can enable or disable the use of field edit masks under Configurations / Data Formatting.

**Use Edit Mask for States** - ExpressMaintenance can automatically format state fields for US two character state abbreviations. Select Yes to use this edit mask / format or No to turn this feature off. If you are entering international addresses, you should turn this feature off.

**Use Edit Mask for Zip Codes** - ExpressMaintenance can automatically format zip code fields for US zip codes. This will not allow the use of alpha characters. Select Yes to use this edit mask / format or No to turn this feature off. If you are entering international addresses, you should turn this feature off.

**Use Edit Mask for Phone Numbers** - ExpressMaintenance can automatically format phone number fields for US phone numbers with area code required. Select Yes to use this edit mask / format or No to turn this feature off. If you are entering international addresses, you should turn this feature off.

**Default Forms Folder** - Sets the default folder for any forms within ExpressMaintenance. Users can change this default by using the drop down arrow and selecting a folder from the desktop.
Default Notes Font - Sets the default font when entering data in memo / notes fields. Users can change the font name and size within the memo as all memo fields are rich text.

Default Notes Font Size - Sets the default font size when entering data in memo / notes fields. Users can change the font name and size within the memo as all memo fields are rich text.

Default Country - Enter the default country to be inserted when entering new records.

Network Access File Folder - ExpressMaintenance uses a special file (ExpressMaintenance.naf) to track the number of concurrent users. This file by default resides in the folder with Maintenance.exe. However, it can be located elsewhere but the location must be identified here.

5.1.1.4 Performance Settings

Access
Administration / Setup / Configuration / Performance Settings

Explanation
Performance settings can be used to optimize performance of data queries and opening of certain screens.
Beginning with version 8.1.2.1, ExpressMaintenance includes a section for optimizing application performance. These options allow you to specify how you want the program to handle queries and the opening of certain screens which typically include a large volume of data. The selections made under Performance Settings are applicable system wide and will apply to all users when running ExpressMaintenance.

Below is an explanation of each of the options found under Performance Settings.

**Limit Size of Notes (bytes)** -

**Limit Size of Pictures (bytes)** -

**Query Max Records** - This option specifies the maximum number of records that can be retrieved in a single SQL Server query. If you search for all records in a query, the result set might be too large, resulting in an 'out of memory' or 'insufficient space' error. This can occur if there are a large number of records with graphics in the notes fields (example: Work Orders & Work Requests). There is rarely a need to query all records as it is much more productive to narrow your query using the search options than scrolling through thousands of records. It is recommended that this setting be 3,000 or less.

**Query Max Seconds** - Most queries to the SQL Server are very fast. However, they can be slower depending on your network configuration and the amount of records being retrieved. This setting specifies the maximum number of seconds allowed for a given query. It is recommended that you select 30 for this option. However, you may find it necessary to select a larger number under certain circumstances.
Query Cursor Location - By default, ExpressMaintenance uses the Cursor Location of Client. This means the data is retrieved from the SQL Server and stored in the temporary memory of the client workstation. Once the data is retrieved, the performance is very fast as records are edited. Depending on the volume of data and the performance of your network connection, it may be more desirable to use a Cursor Location of Server. This means the data query results remain in the memory of the SQL Server computer and the workstation (client) simply communicates edits to the server. Typically, a cursor location of Server will provide faster query results but slower scrolling and posting of edits. A cursor location of Client will provide slower query results but faster scrolling and posting of edits. Using a cursor location of Server can help avoid 'out of memory' and 'insufficient space' errors when query results are extremely large.

Query Cursor Type - By default, ExpressMaintenance uses a Cursor Type of Static. Changing the cursor type can improve SQL query performance slightly in some circumstances. The recommended setting is Static but under some circumstances you might find Keyset or Dynamic to improve performance. Cursor Types of 'Forward Only' and 'Unspecified' cannot be used with a Cursor Location setting of 'Server'.

Query All Companies on Open - Indicates if the program should query all companies when opening the companies screen. Setting this option to Yes is convenient but may cause an undesirable delay depending on the number of company records. If you have a large number of Company records, it is recommended you select No for this option.

Query All Parts on Open - Indicates if the program should query all parts when opening the parts screen. Setting this option to Yes is convenient but may cause an undesirable delay depending on the number of parts records. If you have a large number of Parts records, it is recommended you select No for this option.

Query All Units on Open - Indicates if the program should query all units when opening the units screen. Setting this option to Yes is convenient but may cause an undesirable delay depending on the number of unit records. If you have a large number of Unit records, it is recommended you select No for this option.

5.1.1.5 Email Settings

Access
Administration / Setup / Configuration / Email Settings

Explanation
ExpressMaintenance allows users to email purchase orders and work orders directly from within the program. Use these configuration settings to setup certain required data needed for emailing from ExpressMaintenance.
**Note:** *ExpressMaintenance* includes the ability to email work orders and purchase orders directly. In order to utilize this feature, you must setup certain information about your email server and login account.

The sender of email will always default to the email account of the user logged into ExpressMaintenance. The recipient of the email will default to the vendor for purchase orders and the assigned employee for work orders. This screen declares the server and the login account on the server to be used. In addition, users can setup a list of default people to carbon copy, subject line and body text.

5.1.1.5.1 General Email

**Access**
Administration / Setup / Configuration / Email Settings / General Email

**Explanation**
ExpressMaintenance allows users to email purchase orders and work orders directly from within the program. Use these configuration settings to setup certain required data needed for emailing from ExpressMaintenance.
Run Email Test Utility -

SMTP Server Name -

Sender Account on Server -

Sender Password on Server -

Email Port (Default 25) -

Email Sender IP (Default Blank) -

Requires Authentication (SPA) -

TLS Setting -

Email Format -

Attachments Format -
5.1.1.5.2 Request Emails

**Access**
Administration / Setup / Configuration / Email Settings / Request Emails

**Explanation**
ExpressMaintenance allows users to email purchase orders and work orders directly from within the program. Use these configuration settings to setup certain required data needed for emailing from ExpressMaintenance.

Email New Requests -
Subject Line for Request -
Copy Recipients on Request -
Body Format for Requests -
5.1.1.5.3  Purchase Order Emails

**Access**
Administration / Setup / Configuration / Email Settings / Purchase Order Emails

**Explanation**
ExpressMaintenance allows users to email purchase orders and work orders directly from within the program. Use these configuration settings to setup certain required data needed for emailing from ExpressMaintenance.

Subject Line for PO's -
Copy Recipients for PO's -
Body Text for PO's -
Subject Line for RFQ's -
Copy Recipients for RFQ's -
Body Text for RFQ's -
5.1.1.5.4 Work Order Emails

**Access**
Administration / Setup / Configuration / Email Settings / Work Order Emails

**Explanation**
ExpressMaintenance allows users to email purchase orders and work orders directly from within the program. Use these configuration settings to setup certain required data needed for emailing from ExpressMaintenance.

Subject Line for Work Orders -

Copy Recipients for Work Orders -

Body Text for Work Orders -

5.1.1.6 Companies

**Access**
Administration / Setup / Configuration / Companies

**Explanation**
Companies is used to enter ID, Terms, and Label information. Before you can enter Purchase Orders, you must enter certain data about vendors.
Next Company ID Number - Use the arrows to manually select the company ID number.

Default Terms - Terms are setup to serve as available methods of payment for Vendors.

User Fields 1-4 - Use these fields to store additional information you might need to track on companies.

5.1.1.7 Equipment (Units)

Access
Administration / Setup / Configuration / Equipment (Units)

Explanation
Enter default settings relating to Equipment (Units).
Define Unit Screen Layout -

Include Inactive Units in Query -

Auto Generate Unit Number -

Unit Number Prefix -

Next Unit Number -

Default Units Search Field -

Default Unit Tab on Open -

Default Attachments Folder -

Default Downtime Reason -

5.1.1.8 Parts Inventory

**Access**
Administration / Setup / Configuration / Parts Inventory

**Explanation**
Enter your preferences for the parts data. Options include how pick lists will be sorted & searched.
Define Parts Screen Layout - Executes the Parts User Defined Fields wizard which allows users to define up to 21 user defined fields. You can also set the name to be applied to the user defined tab.

Include Inactive Parts in Query -

Auto Number Parts - Indicates if you would like for ExpressMaintenance to automatically number parts for you. Part numbers are not required but recommended.

Next Part Number - As parts are entered, they can be assigned the next available sequential part number. This field represents the starting / next available part number. You should not need to edit this field as the part number is fairly insignificant. Searches can be performed by the part name, vendor number, manufacturer number, etc.

Part Number Prefix - If you would like to have part numbers prefixed, enter the desired prefix here and ExpressMaintenance will automatically insert the prefix on insert of a new part record.

Warn On Un-Available Parts - Select Yes if you want ExpressMaintenance to warn you when creating work orders and a selected part is not available in inventory. Select No at anytime to disable this feature.

Default Parts Search Field - The default search field selected when opening the Parts Search screen.

Default Parts Tab on Open - Sets the default tab to appear in lower section when the parts screen is first opened.

Warn on Duplicate Part Number - Turning on/off will warn if user is assigning a part number that already exists.

Warn on Duplicate Vendor Part Number - Turning on/off will warn if user is assigning a vendor part number that already exists.
5.1.1.9 Purchase Orders

**Access**
Administration / Setup / Configuration / Purchase Orders

**Explanation**
Enter your preferences for purchase order numbering and taxes.

![Image](image-url)

**Pay Sales Tax** - Indicate if sales tax will be charged on services performed for other companies or departments.

**Sales Tax Rate (%)** - The default sales tax rate to be charged when services are performed for other companies or departments.

**Next Purchase Order Number** - As purchase orders are entered, they are given the next available purchase order number. This field represents the starting / next available purchase order number. You should not need to edit this field.

**Warn on Duplicate WOs & POs** - Check to have the program warn if there is a duplicate PO with the same number already in the system.

**Default Parts Reorder Qty. To** - The user has the ability to set the order quantity to minimum balance or maximum order quantity.
5.1.1.10 Scheduling

**Access**
Administration / Setup / Configuration / Scheduling

**Explanation**

![System Configuration / Settings]

- **Work Week Begins** -
- **Work Day Begins** -
- **Work Day Ends** -
- **Notification Checking Frequency (mins)** -
- **Default Days Back on Overview / Flash** -
- **Default Days Forward on Overview / Flash** -
- **Default Count Range on Overview / Flash** -
- **Allow Editing in Service Overview** -

5.1.1.11 Work Orders

**Access**
Administration / Setup / Configuration / Work Orders
Explanation
Work orders are divided into three different sections. Enter your preferences for work orders under each section.

General Settings

Charges & Auto Apply

Printed Documents

5.1.1.11.1 General Settings

Access
Administration / Setup / Configuration / Work Orders / General Settings

Explanation

[Diagram showing configuration settings for work orders]
Require a Service on All Work Orders - Check to require a service be selected on every work order.

Require a Scheduled Date on WO Created -

Require Category on WO Create -

Require a Group on WO Create -

Require a Class on WO Create -

Require a Priority on WO Create -

Require a Requester on WO Create -

Require a Work Group on WO Create -

Require an Employee on WO Create -

Auto Assign Work Order Numbers - By default, ExpressMaintenance will auto assign sequential work order numbers. You can optionally manually enter work order numbers by setting this option to No. If you select the manual method, it is the users responsibility to make sure duplicate work order numbers are not entered.

Next Work Order Number - As work orders are entered, they are given the next available work order number. This field represents the starting / next available work order number. You should not need to edit this field.

Allow Edit of Work Order Number - Check to allow editing of the work order number. This is not recommended as you can result in duplicate work order numbers.

Warn on Duplicate WOs - This feature will warn if a duplicate work order or purchase order is entered for a given company. It is based on the Reference field in work orders and the ticket number field in purchase orders along with the company selected. This feature only warns when a duplicate is found. It is very helpful in preventing duplicate entry.

Name Technician Employees - The terminology to be used for employees who perform the services (example: mechanics, operators, etc).

Show Employee Labor Rates - Check to show employee labor rates in work order employee pick list.

Default Schedule Days Out - When creating work orders automatically from the service overview screen, you are prompted for a schedule date. Use this field to set the number of days from the current date to default the schedule date. If you normally schedule work orders two days in advance, set this field to 2.

Default Category on PM Work Order - Select a default category for all work orders create as PMs via the Service Overview screen.
Default Priority on Work Orders - Select the default priority setting for new work orders created.

Default Sort in Work Order Overview - Select the default sort order when viewing work orders in the overview screen. Other sorts are available from that screen as well.

Filter Services List by Category - If you have setup your Services and Units using the same categories, it may be desirable to only have services of the same category listed in the pick-list in the work order screen. Alternatively, you can only list services that are already assigned as PMs to the unit. Select the desired method of handling the services pick list in the work order screen.

Filter Parts List by Category - If you have setup your Parts and Units using the same categories, it may be desirable to only have parts of the same category listed in the pick-list in the work order screen. Alternatively, you can only list parts that have been associated with the selected unit. Select the desired method of handling the parts pick list in the work order screen.

Auto Adjust Unit History on WO Edit -

Insert Timestamp on WO Completion -

5.1.11.2 Charges & Auto Apply

Access
Administration / Setup / Configuration / Work Orders / Charges & Auto Apply

Explanation

Default Labor Rate - The default labor rate to be used when charging other companies or departments for services rendered.

Default WO Tax Rate - Enter the default tax rate to be used on Work Orders. You can override the rate on any given work order.

Compute Taxes on Labor - Indicates if the program should compute taxes on labor in work orders.

Compute Taxes on Parts - Indicates if the program should compute taxes on parts in work orders.
Auto Add Part Item - Select the part / item description to be automatically added to work orders.

Auto Add Formula - Select the formula to be used for auto adding the additional charge / part to work orders. Basis options include: Flat Rate, Total Cost, Labor Cost, and Parts Cost.

Auto Add Rate - Enter the rate or flat amount to correspond with the Auto Add Formula.

Auto Add Parts Taxable - Indicate if the auto add item / part is to be taxable.

Auto Add To All Work Orders - Indicate if by default the auto add charge applies to all work orders or just those selected.

Other Costs Auto Percent of Parts - Indicate a percentage of the labor total that is to be computed for the Other Costs field.

Other Cost Auto Percent of Labor - Indicate a percentage of the parts total that is to be computer for the Other Costs field.

5.1.1.11.3 Printed Documents

Access
Administration / Setup / Configuration / Work Orders / Printed Documents

Explanation

Services Heading on Work Orders - Indicates the heading to appear above services on printed work orders.

Parts Heading on Work Orders - Indicates the heading to appear above parts on printed work orders.

Worksheet Report Option 1 - 3 - When printing work order worksheets, you can select from three report formats. Select the three formats here.

Completed Report Option 1-3 - When printing work order forms, you can select from three report formats. Select the three formats here.
5.1.1.12 Express Requests

Access
Administration / Setup / Configuration / Express Requests

Explanation

Require Valid Location -
Require Valid Unit -
Include Inactive Units in Pick List -
Require Valid Service
Allow Users to View Others Requests -
Default Notes in New Requests -

5.1.1.13 Mobile App Settings

Access
Administration / Setup / Configuration / Mobile App Settings

Explanation
Customer Number -
Serial Number -
Registration Code -
Modifier -
Port ID # -
Mobile Login Type -
Mobile PIN Digits -
Licensed Units -
Subscription Ends -

5.1.1.14 URL Links

Access
Administration / Setup / Configuration / URL Links

Explanation
URL links show the user the path or web page link for some important links in ExpressMaintenance.

If you can't access one of the links above please email support@expresstechnology.com
One other issue may be that your company blocks external websites.

Note: You will not want to change these links.

5.1.2 Services

Access
Administration / Services

Explanation
The Configuration screen should only be accessed by the system administrator. It is used to
enter certain data about the company and how *ExpressMaintenance* is to operate.

**Note**
Because *ExpressMaintenance* includes a very powerful Report Builder that allows you to extract and report on data in user definable formats and sorts, special attention is suggested in naming service descriptions. You can group services through the use of their name. This provides for quicker searching and selecting of services as well as easier reporting. For example, using the data below, we can quickly position to any services involving "Sensor". Likewise, when reporting, we can report on all Sensor related services by using "Sensor%" or we can be specific and search where service is "Sensor; Replace Tachometer".

Following is a sample screen shot and field definitions:

![Sample Screen Shot](image)

**Inserting / Editing**
To insert or edit a record, simply click on the data navigator at the top of the screen.

**Data Fields**
- **Description** - The Service Description (name) which may be up to 35 characters long. Please note the naming suggestions above.
- **Category** - The Service Category to which the service applies. Select from the list of categories as setup under *Administration / Codes*.
- **Work Group** - Indicates the default work group for handling this services. Very convenient field for searching and sorting services and work orders.
- **Cost Center** - You can define Cost Centers with *ExpressMaintenance*. All services can be applied to any given cost center.
**Period** - The default period for which the service should be performed and re-scheduled. Options include Days, Hours, Miles, Months, Weeks & Years. This is only the default and the actual service period can be changed at the Unit (equipment) level. This field corresponds with the Interval field.

**Interval** - The interval in which the service should be performed and re-scheduled. This field corresponds with the Period field. For example if "Days" is selected in the Period field and "60" is entered in the Interval field, then the service is to be performed every 60 days.

**Separate WO** - When checked, indicates this services should always be put on a work order by itself rather than with other services.

**In Requests** - Check this option if you want the service to appear in the list of services of in *ExpressRequest*.

**Labor Estimate** - The estimated amount of labor time in hours that this service should take. This field is used for comparisons to actual labor time used. This field is completely optional and can be edited later.

**Cost Estimate** - The estimated cost of performing the service whether performed in house or by an outside firm. This field is used for comparisons to actual cost used. This field is completely optional and can be edited later.

**Safety Notes** - Any Safety Notes associated with the service item. Note, you can double click on this field to access a larger screen for entering these notes.

**General Notes** - Any General Notes associated with the service item. Note, you can double click on this field to access a larger screen for entering these notes.

This button opens the Schedule Services Wizard which allows for very flexible setup of services as shown above. For more details on the Schedule Wizard, please see the Maintenance / Unit - Services (PMs) topic.

**Printing**
To print a list of services, simply click on the Print button.

### 5.1.3 Codes

**Access**
Administration / Codes

**Explanation**
Many areas of *ExpressMaintenance* use codes for selection lists. Codes are important as they
allow you to insure that data is entered accurately and consistently. You can edit, delete and insert new codes at any time using this screen.

The Code Types are listed on the left and the corresponding codes for each code type are listed in the right panel. Select the desired code type and proceed to edit codes on the right.

**Enable / Disable**
You can enable and disable code types for the *user defined fields only*. All other code types are automatically enabled and remain enabled.

### 5.1.4 Cost Centers

**Access**
Administration / Cost Centers

**Explanation**
It is often desirable to associate services and parts usage with a cost center or budget item.
ExpressMaintenance provides the ability for users to completely setup their own cost centers as used by their organization. Once cost centers are setup here, they are available in a picklist throughout ExpressMaintenance where services or parts are entered as part of work performed.

Cost Centers may be used in a number of ways to represent expense / budget categories. As data is accumulated, it can be compared and tracked in relation to budget considerations. Users can also export work order expenses along with cost centers for the purpose of importing data into other applications.

The following is a sample screen shot and field explanation:

Inserting / Editing
To insert or edit a record, simply click on the data navigator at the top of the screen.

Data Fields
Cost Center - The alpha / numeric cost center code as used by your organization. If you are in the transportation business, you can populate the cost centers table with the desired ATA Codes.
Description - The description or name of the cost center.
Budget - The annual budget amount for the cost center.
LinkField - Available field to link the cost center with other applications such as accounting.
5.1.5 Companies

**Access**
Administration / Companies

**Explanation**
Companies is the table for all Customers, Vendors, Manufacturers and Carriers. Before you can enter Purchase Orders, you must enter certain data about vendors.

**General** - Use the navigator bar to insert and edit company records. The screen is designed around the Master / Detail relationship in which a Company is entered (Master Record) and unlimited Addresses (Detail Records) can be entered for each company. Enter the basic company information in the top portion of the screen followed by detail information including Addresses, Contacts and Other.

**Addresses** - Each company address is entered on the bottom portion of their company file. You may enter as many addresses for each company as necessary. For example, one particular company may have one address for sales, one for shipping and another for invoices. You may enter each address separately and use the Address Type field to distinguish what type of address each represents. Customers and vendors are setup in the same screen so be sure to check if the company is a Customer, Vendor, and / or Prospect.

Note: You must enter at least one address (or portion of an address) in order for a company to appear in the various pick lists available throughout the system.

**International Addresses** - If you are entering international addresses, you will not want to use the standard US edit masks / formatting. You can turn on / off these features through Administration / Defaults / Data Formatting.

**Contacts** - You may also click on the tab labeled Contacts and enter unlimited contacts for each company.

**Notes & Followup** - Any notes for a company can be entered by clicking on tab labeled Other.
**Inserting / Editing**
To insert or edit a record, simply click on the data navigator at the top of the screen.

**Data Fields**
- **Name** - Company name.
- **TaxID** - The federal tax ID for the company usually used with vendors.
- **Terms** - The default terms for this vendor or customer. Select the terms from those setup in Administration / Terms.
- **Credit Limit** - The credit limit the vendor or manufacturer has approved for your company.
- **Labor Markup %** - Indicates a percent to markup labor on work orders when performing work for the company.
- **Parts Markup %** - Indicates a percent to markup parts on work orders when performing work for the company.
- **Email** - The primary email address for sending copies of documents, work orders, etc.
- **Website** - Optional URL of the company website with button to browse that website.
- **Address, City, State, Zip** - The address for the company.
- **Country** - The country or the company’s address.
- **Attention** - The primary contact person and attention person for statements.
- **License** - Any applicable licensing information you may want to maintain.
- **Type** - The user defined type of company. The selection list of codes are defined under Administration / Codes.
- **Check Boxes** - Select the applicable check boxes for each customer / address.
- **User Fields 1-4** - Use these fields to store additional information you might need to track on companies.
Buttons
Searching for a company is done by using the Search button in the companies screen. You may look up a company by several different field values. (Name, city, state, etc) Simply choose how you want to search for a company, enter the corresponding information in the Value field and click the Search button.

To Print a list of your customers / vendors you will use the printer button on the tool bar of the companies screen. This will give you a complete list of all companies in the table.

Envelopes allows you to print envelopes for one or more companies.

Labels allows you to print mailing labels for one or more companies.

Contacts
The Contacts tab allows you to enter unlimited contacts for each company. Data fields include Name, Phone, Extension, Pager, Department and Email Address.

Notes & Followup
The Notes & Followup tab allows you to enter a Followup Date, Notes and four user definable fields for each company.
5.1.6 Terms

Access
Administration / Setup / Vendor Terms

Explanation
Terms are setup to serve as available methods of payment for Vendors. All terms setup here will be available in the Company screen.
**Inserting / Editing**

To insert or edit a record, simply click on the data navigator at the top of the screen.

**Date Fields**

**Terms ID** - A brief alpha numeric code to assign to each type of terms offered or available to you.

**Name** - A more descriptive name for the terms. This is the value to be printed on invoices.

**Basis** - The basis or logic for the terms. Options include:
- Days - A specific number of days from the invoice date.
- Fixed Day - A specific day of the following month.

**Due Days** - This value varies depending on the Basis and is as follows:
- Days - The number of days from invoice date to compute the due date.
- Fixed Day - The specific day of the following month for the due date.

**Disc Days** - The number of days, if paid within, for which a discount will be earned.

**Disc Percent** - The percent of the invoice that can be discounted, if paid within the discount days.

**Link Number** -
5.1.7 Locations

Access
Administration / Setup / Locations

Explanation
ExpressMaintenance allows you to define unlimited Sites and Locations for each Site. Sites is really a loose term that can be different cities, buildings, terminals or warehouses, etc. Locations are generally specific buildings, departments or divisions. An additional field is available in the Parts screen for the actual shelf / bin where the part may be found.

Notes
You can limit users to only access a specific site when they access ExpressMaintenance. This way, the user will only see Units (equipment), Parts, Work Orders and employees associated with their designated Site. All Locations within the Site will be available to the User. You cannot limit by Location.
**Inserting / Editing**
To insert or edit a record, simply click on the data navigator at the top of the screen or right click and use the popup menu.

**Data Fields**

*Site / Location Name* - A brief descriptive name for the Site, city, building, terminal, warehouse, etc.

*Company* - Optionally, you can select from a company to associate the site with a particular site. This can be helpful in designing reports that join with the site or location.

*Address, City, State* - Automatically inserted when company is selected or can be manually entered.

*Code* - A short code to represent the Location, building, department, or division.

*Description* - More descriptive information about the Site or Location.
5.1.8  Field Locks

Access
Administration / Field Locks

Explanation
Field Lock will set the user default column for each table

Table Name - Select or find the name table name from the grid list.

Field Name - The list will give the available fields to select from each table.

Require Type -

Lock On Insert -

Lock On Edit -
### Manage Field Requirements

#### Overview

- **Table Name**: EmployeeActions, EmployeeActions, Employees, Employees, Employees, Locations, Locations, MaintUsers, Parts, Parts, PartsTransfers, PartsTransfers, Porders, Porders, Requests, Requests, Rolodex, ServHist, Services, ServItem
- **Field Name**: Action, ActionDate, FirstName, LastName, Status, Location, Site, Login, Description, QuantityOnHand, PartIn, PartOut, DateOrdered, VendorName, Requester, UnitName, Name, Service, Service
- **Require Type**: Not Blank
- **Lock On Insert**: Not applicable
- **Lock On Edit**: Not applicable

Drag a column header here to group by that column.
5.2 Manage

5.2.1 Employees

Access
Administration / Setup / Employees

Explanation
The Employees screen is used in ExpressMaintenance for the purpose of entering mechanics and other employees who will be issued work orders or request purchase orders.

Note
Employees are not to be confused with Users. Users are all individuals who will be operating ExpressMaintenance. Employees are individuals who may be assigned work...
orders or request purchase orders. It is likely that more individuals will be entered in Employees than in Users.

The following is a sample screen shot of Employees and field explanations:

<table>
<thead>
<tr>
<th>Inserting / Editing</th>
</tr>
</thead>
<tbody>
<tr>
<td>To insert or edit a record, simply click on the data navigator at the top of the screen.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Data Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong> - The status of the employee. The options are Active and Inactive. When an employee leaves the company, you should not delete their record. Simply change the status to Inactive as they are likely associated with work orders or purchase orders.</td>
</tr>
</tbody>
</table>

| **First Name** - The employee's first name. |
| **Initial** - The employee's middle initial. |
| **Last Name** - The employee's last name. |
| **Full Name** - A 35 character full name for the employee. We recommend using the same method for each employee. For example: Bush, George. You can leave the Short Name field blank and *ExpressMaintenance* will automatically create the value as with Last Name,
First Name.

**Address, City, State Zip, Country** - The employee's address and country.

**Email** - The employee's email address.

**Phone** - The employee's telephone number.

**Cell Phone** - The employee's cell phone number.

**Pager** - The employee's pager number.

**Site** - The site where the employee works if applicable.

**Skills** - List any special skills of the employee. Separate each skill with a comma. Being consistent will allow you to generate reports of employees with certain skills.

**Birth date** - The employee's date of birth.

**Gender** - The employee's gender.

**SS Number** - The employee's social security number.

**Work Group** - Select the work group to which the employee might be associated. Work groups can be shift, trade, or variation of these and other designations. The selection list of codes are defined under Administration / Codes.

**Position** - The title or position of the employee. The selection list of codes are defined under Administration / Codes.

**Labor Cost** - The cost to the company per hour when computing and report repair / service cost reports. This figure will likely be greater than the employee's actual hourly pay rate.

**Labor Rate** - The billable hourly rate when this employee performs services.

**Image** - Optional photograph of the employee. Right click in the picture area for popup menu options for importing images, etc. For more details on importing and editing images, see the topic under Units - Images & Barcodes.

**Include Check box** - Indicates if the employee is to be included in the list of technicians available for completing work orders.

**Action Records**
The employee screen includes a sub table for unlimited notations about an employee. These action records can vary from general notes to accident records or disciplinary action. Actions are user definable and may just be types of notes or accommodations.

**Action** - The code to indicate the action or type of note. The selection list of codes are defined under Administration / Codes.

**Action Date** - Any date associated with the action or entry.

**Followup Date** - If applicable, a follow-up date for the action.

**Action Notes** - Any notes or further skill information concerning the employee or the action. This field can include graphics.

**Printing**
To print an employee list, simply click on the Print employee list button at the top of the Employee screen.

5.2.1.1 Employee Data View

Enter topic text here.

5.2.1.1.1 Actions

**Actions**
Use the action tab to add notes about an employee.

This list can be sorted or filtered depending on the amount of data in the list.

Use the grid properties icon on the top left to display or hide other grid categories.
5.2.1.1.2 Access Settings

5.2.1.1.3 Requester Settings

5.2.1.1.4 User Definitions
5.2.2 Reports

Access
Administration / Manage / Reports

Explanation
ExpressMaintenance includes a very powerful built-in Report Builder. With Report Builder, you can create your own reports and labels as well as alter the exiting ones. In the Report Management screen, you can add and remove reports as well as export and import report templates.

Right click to access the popup menu with various options.

5.2.3 Registration

Access
Administration / Manage / Registration

Explanation
When you purchase software from Express Technology, you will receive a permanent Serial Number and Registration Code. If you have not already done so, you should enter this information under the Registration screen in order to permanently license the product.

To do this, select Administration / Registration. The following screen will appear:

When purchasing, you must furnish the automatically generated serial number to Express Technology. You will then be assigned a corresponding registration code to be entered. Please note that all letters will be upper case. Any characters reflected as "0" will be the number zero and not the letter O. Once you have entered the assigned Registration Code, click Register. If the information is entered correctly, the screen will indicate that the program has been permanently registered. Click the Continue button to proceed running the program. It will not be necessary to enter this information again and you will not be bothered with registration screen in the future.

If you have problems getting the program properly registered, please contact our sales department via email at: support@ExpressTechnology.com.

**Concurrent Users**
ExpressMaintenance is sold on a concurrent license basis. This means that a specified number of simultaneous users can access the program from a single server. The Registration screen also reflects the number of licensed concurrent user slots, the number used and the available number of slots. To expand your license to a desired number of concurrent users, please contact sales@ExpressTechnology.com.
5.2.4 Email Test

Access
Administration / Manage / Email Test

Explanation
ExpressMaintenance uses a component to send standard SMTP email. You can setup ExpressMaintenance to send email when work orders or issues, purchase orders and when requests are created in ExpressRequest.

This utility is designed to be a simple way for administrators to test and resolve any email issues with ExpressMaintenance. When the email does not work in ExpressMaintenance, the problem is always one of two things:

1. The default settings are not correct as setup under Administration / Setup / Defaults / Email
2. Firewall / Security software is preventing ExpressMaintenance from sending email

Use this utility to test and make sure you have the sender settings correct. If you are still unable to send email, the problem is with firewall / security on the network and you must resolve with your IT administrator.

Note
The color of the check indicates the level of authorization. It is important for each user who needs access to ExpressMaintenance to have their own login name and password. This information should be maintained by the system administrator only and access to the users window should be limited to the system administrator.
Server Requires SPA - Controls whether the AUTH LOGIN command is to be issued by the mail component. If an SMTP server requires the user authorization before sending any e-mails, set this property to the value True. After receiving the EHLO response from the SMTP server, the component will issue an AUTH LOGIN command. It then sends the Base64-encoded user ID and password. If a failure occurs, the EnableAuth property will be set to the value False, indicating the connection has not been authenticated. You can compare this setting to your email settings in Outlook for more information.

Prompt Explanations
SMTP Server - Remote URL of the SMTP Server (example: mail.myserver.net).

Server Port - The port to be used when sending emails.

Bound IP - The sender's IP to be used (not usually required).

Sender Account - Specifies the user ID to use when establishing an authenticated connection with an SMTP server. When setting the EnableAuth property to the value True, set the value of this property to the user's ID. UserID is the name of the account to which the SMTP server grants access upon successful logon. This is usually the name part of the user's e-mail address, but could also be a specific account name. The UserID property is used with the Password property to log on to the server. (example: jdoe)

Sender Password - Specifies the password to use when establishing an authenticated
connection with an SMTP server. When setting the EnableAuth property to the value True, set the value of this property to the user's password. Password is the password associated with the UserID for a given SMTP account. (example: mypassword)

**Mail From** - The email address of the person sending the email. (example: jdoe@myserver.com)

**Mail To** - The email address of the intended recipient. (example: bjoness@bigcompany.com)

**Mail CC** - The email address of a carbon copy recipient.

**Subject** - The subject of the message being sent.

**Attachment** - Select a file to attach to the email.

**Message** - The message content.

**SMTP Component Technical Information**
The TIpSmtpClient component handles sending e-mail from your system to an e-mail server. The component uses the TIpMailMessage class to contain the message to send, manages connecting to your e-mail server, logging on, and the transfer of the actual message. The commands sent are specified in the appropriate RFCs, so consult those if you need to expand on the existing methods. The TIpSmtpClient component can be used in two distinct ways. It can send individual SMTP commands such as HELO to log on or DATA to send a message. It can also perform SMTP tasks to send multiple commands. For example, the SendMail method starts the stSendMail task which connects, logs on, and sends the message. SMTP servers almost universally accept the basic SMTP commands, but some extensions have been added.

### 5.3 System

Enter topic text here.

#### 5.3.1 Check Updates

**Access**
Administration / System / Check Updates

**Explanation**
ExpressMaintenance allows for you to update to the latest version from the internet.

**Notes:** Updating will require a password. Be sure that you are up to date on your maintenance plan.
Version Running - Be sure to check what version you are currently running. This is also a way to check what version you are running for any support emails.

Available Version - This will give you the latest version of ExpressMaintenance.

Update Web Page - This will redirect you to the ExpressMaintenance web page to update to the latest version.

How to download & install updates – click here
Release 8.X Release Notes
Request Update Password

Note: These updates are only for customers current under the annual software maintenance plan.

<table>
<thead>
<tr>
<th>ExpressMaintenance Updates (Password Required)</th>
<th>Version</th>
<th>Size</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>ExpressMaintenance Update</td>
<td>8.3.7.3</td>
<td>18.9 MB</td>
<td>08/16/2016</td>
</tr>
<tr>
<td>ExpressRequest Update</td>
<td>8.3.2.1</td>
<td>14.4 MB</td>
<td>08/29/2016</td>
</tr>
</tbody>
</table>

Check for Updates - Click to check for any available updates. In no updates are available then you'll get a pop up window (See Below).
5.3.2 Back & Restore

Access
Administration / Databases / Backup & Restore

Explanation
SQL is an extremely powerful database engine that utilizes advanced technology to provide unmatched performance. The SQL data files (example: ExpressMaintenance_Data.MDF & ExpressMaintenance_Log.LDF) normally reside in the MSSQL7\Data folder and are in use at all times the SQL database engine is running. Therefore, they cannot be backed up without using software to perform the sql backup to a single file. ExpressMaintenance includes such an option.

How SQL Backups Work
Backups with an SQL database engine are different in the sense that you cannot just backup the data files. You must run an sql statement that backs up the database and log file to a single file. The resulting file can then be archived like any other file. ExpressMaintenance and ExpressUtility provide a convenient interface for performing backups. The examples below assume you are at the server. Otherwise, you will need to use UNC paths. You may also need to adjust your SQL Server startup settings, see Special Network Instructions
Steps To Backup

1. Run ExpressMaintenance
2. Click on Administration / Backup & Restore
3. Click on the Backup button
4. Select the folder where the backup file is to be created (example: C:\MSSQL\Backup)
5. Enter the file name of the destination backup file (example: ExpressMaintenance.zip) Do not include spaces.
6. Click the Save button and then click Yes to proceed

ExpressMaintenance will execute the proper sql statement to backup the database to a backup file with the same name but .bak extension (example: ExpressMaintenance.bak). Once the backup is completed, the file will be compressed into the specified file (example: ExpressMaintenance.zip). You can now copy the file to another computer, CD or other removable media.

Note: If you have trouble backing up across the network you will likely need to change the SQL setting to allow file creation via the network. See Special Network Instructions below.

Steps To Restore

1. Get the file (example: ExpressMaintenance.zip) on the hard drive of the destination computer.
2. Make sure that all other users are not using the database that resides on the destination server. The database cannot be restored if it is in use.
3. Run ExpressMaintenance at the computer where the restore is to be placed. You must run the restore at the destination sql server computer and the file must be on that computer.
4. Click on Administration / Backup & Restore
5. Click on the Restore button
6. Select the folder where the backup file resides (example: C:\MSSQL\Backup). Note, the file must be on the hard drive and not removable media as it will need to be decompressed.
7. Click Yes button to proceed.
8. Click Yes button to acknowledge overwrite warning and proceed.
9. The application will close and the Restore dialog box will appear.
10. Make sure the server, database, sa password and file name is correct. Note that the "sa" password is not the password in ExpressMaintenance but rather the "sa" password in SQL server. By default, this password is blank (no password). You may need to get this password from your system administrator.
11. Click the Restore button to perform the restore.

ExpressMaintenance will decompress the origin file into a temporary file. Once the decompression is completed, it will execute the proper sql statement to restore the database using the temporary file.
**Common Problems**

The most common problems experienced are:

- Users often attempt to manually copy the database files. This cannot be done since they are always in use by the SQL server.
- Backups fail when users are backing up to and from a workstation other than where the sql data resides. This can be done but special settings must be made at the server to allow for this. See Special Network Instructions below.
- Users attempt to backup or restore directly to a removable media such as a CD. You must backup to the hard drive and then copy the file from the hard drive to the removable media. This is because the backup file is created and then compressed / decompressed and the original file is removed.
- Users attempt to backup and restore databases from differing version of SQL Server. Databases are not backwards compatible from SQL 2000 to SQL 7. Databases are upwards compatible from SQL 7 to SQL 2000.
- Users often attempt to restore the database to a server while other users are connected and using the database.

**Special Network Instructions**

The normal setup for SQL Server should work fine for most local backup needs. However, if you need to have the database backup created on another computer on the local network other than the server, you will need to make some manual adjustments. You will only need to make these adjustments one time. The problem is that the SQL Server starts up using a regular login without any network access. Therefore, it is unable to write the backup file to a remote computer on the network.

The following steps must be taken at the server to have the SQL Server startup using the special Network Service account when starting up. This enables the SQL Server to write backup files across the network. Please follow these steps to have the SQL Server service start with network access:

1. Have all users exit programs that use the SQL Server.
2. At the SQL Server computer, open the Service Manager by double clicking or through the menu.
3. Click the Stop button to stop the SQL Server.
4. On the Start menu, point to Settings, and then click Control Panel.
5. Double click on the Services icon or you may need to go to Administrative Tools / Services.
6. This opens the Service Management screen.
7. Locate the MSSQL Server item and Double click to open the properties.
8. In the MSSQL Server Properties dialog box, click on the Log On tab.
9. Select the This account for the Login as option.
10. Click the Browse button.
11. Click the Advanced button.
12. Click the Find Now button.
13. Scroll through user list and click on the NETWORK SERVICE user.
14. Click OK to close the Advanced Select User window. If prompted for a password, obtain this from your system administrator.
15. Click OK to close the Select User window.
16. Click OK to close the Properties window.
17. Close the Services Management window.
18. Back in the SQL Service Manager, Start the SQL Service.

Also, ensure that you have proper read/write access to the file system on the remote machine you will be backing up to. (Refer to Windows documentation on how to set directory/file permissions or see your system administrator).

**Unattended Backups**
It may be desirable to have unattended backups for the purpose of writing to tape drives and other removable media after hours. If you are running the full version of SQL Server, you should refer to your SQL Server documentation for information on backing up databases. SQL Server includes the ability to setup routine maintenance tasks including backups.

Other commercial backup software is available which includes options for backing up SQL databases. We have developed ExpressSQL for unattended backups and other SQL database management options including shrinking and optimizing the database. ExpressSQL allows you to schedule unattended backups and email confirmation of the backup. For more details on ExpressSQL and to download a free evaluation copy, please visit the website at [www.ExpressSQL.com](http://www.ExpressSQL.com).

### 5.3.3 Connectivity

**Access**
Administration / Databases / Databases & Connections

**Explanation**
Use this screen to test and verify connectivity to the SQL Server and Database. You can test with both Windows and SQL Authentication as well as various logins and passwords. This screen also allows you to create additional databases using the existing or other databases as a model.

Keep in mind this is the actual SQL logging and password and not related to the user accounts setup in ExpressMaintenance.
The screen also provides options for the ExpressMaintenance.ini connection file and for creating the special ‘etuser’ login account.

### 5.3.4 Rebuild Views

**Access**
Administration / System / Rebuild Views

**Explanation**
Use this option to rebuild the SQL Views used by ExpressMaintenance. This option simply executes the SQL statement that rebuilds the views and reports their completion.
Maintenance

Chapter VI
6 Maintenance

The Maintenance Menu of ExpressMaintenance is where most of the day to day processing and reporting occurs. Under the Maintenance Menu, users maintain Unit (Equipment) data, maintain Unit Services, generate and update work orders and generate reports.

Note
ExpressMaintenance uses the term "Units" to refer to any item for which maintenance related data is maintained. Originally, this was thought to primarily be large or expensive equipment. However, our customers now maintain scheduled maintenance on many other items including buildings, motors, vehicles, tanks, antennas, employees and many other items.

The Maintenance Menu appears small because most of the options are combined in single screens for simple one-click switching access. For example, within the Work Orders option, users can review maintenance issues that are due as well as create, assign, print and update work orders. The Maintenance section of this help covers the following topics:

Maintenance Help Topics
Units - General - General data relating to Units (equipment).
Units - Arranging Tabs - Explanation of how to arrange the lower tabs of the Units screen.
Units - Images & Barcodes - How to import images and how to generate barcodes.
Units - Vehicle Data - Explanation and sample of the vehicle related fields of Units.
Units - Lease & Warranty - Explanation and sample of the lease & warranty related fields of Units.
Units - Attachments & Devices - Explanation and sample of attachments, device & valve related fields of Units.
Units - User Defined - Explanation of user definable fields and tabs.
Units - Notes - Explanation and sample of the notes fields of Units.
Units - Sources - Explanation and sample of the vendor and source related fields of Units.
Units - Scheduled Services - Explanation and sample of scheduling services for Units.
Units - Service History - Explanation and sample of service history on Units.
Units - Downtime - Explanation and sample of the downtime screen for units.
Units - Parts - Explanation of parts being associated with units.
6.1 Maintenance Overview

How do I get started with preventative maintenance?

One of the major features of ExpressMaintenance is the process of managing preventative maintenance tasks. ExpressMaintenance allows you to setup certain maintenance tasks (services) that are to be periodically performed on your equipment. You can then use a powerful service overview screen to view all services due and have the program instantly create work orders. When work orders are completed, services are then rescheduled based on the setup period and interval. You can even have ExpressMaintenance perform the service overview query every time you open the program and flash to notify you services are due.

The following is a step by step explanation of setting up preventative maintenance items and creating work orders in ExpressMaintenance.

**Note**

1. Always make sure you have the latest release of ExpressMaintenance by checking the Updates Page of our website.
2. The following is a diagram of the overall maintenance process and flow within ExpressMaintenance.

![Diagram of maintenance process and flow within ExpressMaintenance](image)

**Setting Up Services**

1. Click on Administration / Services to access the Services setup screen of ExpressMaintenance. In this screen, you can enter all of the services that may be performed on Units (equipment). As you enter services, you can assign a category to the service such as Repair, Cleaning, Inspection, etc. You can define your own categories under Administration / Codes / Categories. For more information on setting up codes, see the Codes Setup Tech Bulletin.
2. When entering Services in the Services setup screen, you can also define the Period and Interval that is most common for the Service. For example, a particular service might...
most often be performed every Five (Interval) Months (Period). When the service is applied to the Unit, you can change the Period and Interval to meet the needs of the equipment.

3. Note that you can always return to the Services setup screen and add new services as needed.

**Assigning Services To Units**

1. Click on Maintenance / Units to view the Units (equipment) screen. You can use the Next and Previous buttons or the Search button to locate the desired Unit.
2. Once the desired unit is located or entered, click on the "Scheduled Services (PMs)" tab in the center portion of the screen.
3. Click the Insert button for the Scheduled Services and insert a service item record. You will select the service from the pick list and assign the Period and Interval information. You will also want to enter the Last Date Performed and the Scheduled Date.
4. Once you have entered the services that apply to the particular units, you are ready to review scheduled services and create work orders.
5. You can also enter specific notes or procedure checklists for the service and that unit by clicking on the Service Notes button.
6. You can also specify required parts for the service by clicking on the Service Parts button.
7. You can also inherit / copy service from another unit to the current unit. See Helpful Hint at the end of this bulletin.

**Viewing Services / Creating Work Orders**

1. Click on Maintenance / Service Overview to access the Service Overview screen and view all services that are due. Enter the date range and other parameters for the desired services and click the "Search" button. All services that are scheduled within the date range will be displayed.
2. The services that are due are listed and grouped by Unit. You can select certain services for generating work orders or you can click the "Select All" button to select all services. You can also print a report of services due by clicking the "Print List" button.
3. Once you have selected the desired services for creating work orders, click the "Create Work Orders" button. You will be prompted for an Employee Name (optional) and Scheduled Date (required). Enter this information and then click the "Ok" button. Work Orders will be created for all selected services. A separate work order will be created for each Unit.
4. Once Work Orders are created, you will be prompted to Print the Work Orders.
5. Finally, you can view the work orders data by clicking on the Work Orders tab. A query will be automatically performed of the newly created work orders. You can make further edits to the work orders at that time. You can also scroll through the new work orders by using the Next and Previous buttons of the Data Navigator bar.

**Note:** ExpressMaintenance includes a flag notification method that automatically queries
the services due and notifies the applicable users if services are due. For more details on service due notification, please see the Service Notification Tech Bulletin.

**Viewing Work Orders**
1. The most convenient way to view work orders is the Work Order Overview screen. Click on Maintenance / Work Order Overview and perform a search to see all Scheduled Work Orders for the range of dates desired. Once work orders are displayed in the grid, you can double click on a work order to see the Work Order data entry tab and make edits.
2. Another way of viewing work orders is to click on Maintenance / Work Orders and then click on the "Search" button to search for the work order.
3. Finally, you can also click on Navigate / Maintenance / Reports and print the "Work Orders - Scheduled" report.

**Manual Work Orders - Breakdowns**
Often it is necessary to create work orders for matters other than preventative maintenance. For example, you might need to create a work order for the repair of equipment that has been damaged or is a breakdown. You can quickly enter a work order directly in the work order screen.

1. Click on Maintenance / Work Orders to open the work order screen.
2. Click the Insert button to insert a new record.
3. Complete the upper portion of the work order screen by selecting the unit, employee, etc.
4. In the services section of the work order screen, click the insert button and select the service that is to be completed/ performed on the equipment.
5. Post the record and print the work order.

**Completing Work Orders**
1. To complete a work order, use option one or two above to locate the desired work order.
2. Once the desired work order is displayed in the work order screen, you can complete the work order by completing the data entry fields. To complete a work order, you must enter a Completion Date and click the Complete checkbox on each service in the Services Performed section. You can also click the “Complete Entire Work Order” button to automatically complete the entire work order with one click.
3. You may also want to enter the labor time on each service and any parts used.
4. Once all completion data is entered for the Work Order, click the Post button at the top of the screen. Total costs will be calculated. Most importantly, each service will be updated in the Units screen.
5. When the work order is posted with completion data, the service items will be written to the Units Service History. In addition, the service items will be updated and rescheduled in the Units Scheduled Services screen.
That is it. Once services are assigned to Units, ExpressMaintenance makes tracking

**Helpful Hint**
1. When entering services for each Unit, there is a way to save time if you have multiple units of the same type and similar services.
2. Enter the PM Services for a particular unit and complete all information.
3. When entering a new unit, click on the Services (PMs) tab.
4. Click on the Apply Standard Services button and a dialog will appear listing all units of the same type as the unit on the screen.
5. Select the desired unit from which you will inherit/copy the services.
6. Click the OK button and the program will copy all of the services from the source unit to the new destination unit.

### 6.2 Equipment

The Maintenance Menu of *ExpressMaintenance* includes access to the Units (Equipment).

**Notes**
Work Orders is actually a broad term that refers to the overview and review of services that are due, the assignment of those services and the tracking of services performed along with costs and other data. The multi-purpose Work Order screen is accessed from the Maintenance Menu as shown below:

![ExpressMaintenance Roll Tide Manufacturing Company](image)

The Maintenance Menu appears small because most of the options are combined into a single tabbed window for simple one-click access. For example, within the Work Orders option, users can review maintenance issues that are due as well as create, assign, print and update work orders all from the same window. The Work Orders section of this help covers the following topics:

**Work Order Help Topics**
- Equipment
- Reports
6.2.1 Units - Overview

Access
Maintenance / Equipment / Overview

Explanation
The Maintenance Menu of ExpressMaintenance is where most of the day to day processing and reporting occurs. Under the Maintenance Menu, users maintain Unit (Equipment) data, maintain Unit Services, generate and update work orders and generate reports.

Note
ExpressMaintenance uses the term "Units" to refer to any item for which maintenance related data is maintained. Originally, this was thought to primarily be large or expensive equipment. However, our customers now maintain scheduled maintenance on many other items including buildings, motors, vehicles, tanks, antennas, employees and many other items.

The Maintenance Menu appears small because most of the options are combined in single screens for simple one-click switching access. For example, within the Work Orders option, users can review maintenance issues that are due as well as create, assign, print and update work orders. The Maintenance section of this help covers the following topics:
Maintenance Help Topics

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Units - Vehicle Data - Explanation and sample of the vehicle related fields of Units.
Units - Lease & Warranty - Explanation and sample of the lease & warranty related fields of Units.
Units - Attachments & Devices - Explanation and sample of attachments, device & valve related fields of Units.
Units - User Defined - Explanation of user definable fields and tabs.
Units - Notes - Explanation and sample of the notes fields of Units.
Units - Sources - Explanation and sample of the vendor and source related fields of Units.
Units - Scheduled Services - Explanation and sample of scheduling services for Units.
Units - Service History - Explanation and sample of service history on Units.
Units - Downtime - Explanation and sample of the downtime screen for units.
Units - Parts - Explanation of parts being associated with units.

6.2.2 Units - Data View

Access
Maintenance / Equipment / Data View

Explanation
ExpressMaintenance uses the term "Units" to refer to any item for which maintenance related data is maintained. Originally, this was thought to primarily be large or expensive equipment. However, our customers now maintain scheduled maintenance on many other items including buildings, motors, vehicles, tanks, antennas, employees and many other items.

The Units screen of ExpressMaintenance is used to insert and maintain all data relating to equipment and other items. The screen contains the primary data in the upper half. More detailed data is found under the various tabs located in the lower half of the screen. This help topic covers the Units - General Data.
**Inserting / Editing**
To insert or edit a record, simply click the edit button on the data navigator at the top of the screen.

**Data Fields**

**Name** - The name or complete description of the unit. The name field allows for up to 80 characters.

**Type** - The type field is selected from a picklist of user definable unit types as setup in Administration / Codes. Example: Truck. Use this field to reach the desired organization of units.

**Category** - The category field is selected from a picklist of user definable Categories. Example: Vehicle. Use this field to reach the desired organization of units.

**Make** - The make or manufacturing company of the unit. This is selected from a picklist of Unit Makes.

**Model** - The manufacturers model number or name for the unit selected from codes.
**Capacity** - The capacity field is of course optional but may be used for a volume or output capacity.

**Year** - The model year of the unit.

**Serial Number** - The unit serial number.

**Unit Number** - The number field is optional but can be useful if you reference a number on your equipment. May be auto assigned, see Unit Defaults.

**Status** - Select Active or Inactive. We do not recommend deleting equipment. This will allow you to maintain the costing and service history on the unit but no longer include it as being in service.

**Current Count** - If the unit requires maintenance on a count basis (miles, hours, kilometers, etc), use this field to enter the current count value. You can enter / import the current count for several units in one screen under Maintenance / Update Counts.

**Count Date** - The date for which the current count value applies.

**Installed Date** - The installation or in-service date for the unit.

**Attached To** - Units may be attached to other units. Use this field to select a unit to which the current unit is attached.

**Site** - The site where the equipment is located. This is selected from the pick list of sites setup under Administration / Locations. The Site and Location are selected together.

**Location** - The location of the equipment. The location field is selected from user definable Locations. The Site and Location are selected together.

**Work Group** - Work Group which can be a shift, trade, combination or other meaningful assignment. Work Groups are setup under Administration / Codes.

**Email List** - Enter email addresses separated by the semicolon (;). When emailing work orders, ExpressMaintenance will automatically email these recipients a copy of the work order email.

**Image / Photo** - Optional picture or drawing of the unit. This can be imported from a file or the clipboard. See the section on Images & Barcodes for more details.

*Duplicating*
To duplicate a unit, click the Duplicate Unit button. You will be prompted for the information you wish to duplicate and the number of times to duplicate the unit.

**Overview**

Click on the overview tab to view all units and use the grid column title button to sort the list.

**Performance / Speed**

By default, all records are retrieved in the query when the Unit screen is opened. This is really for demo purposes more than anything else. Once you have a substantial number of records in the system, we recommend that you turn off this feature and search for the set of units or the unit you wish to view / edit. You can turn the "Query All Units On Open" option off under Administration / Configuration / Equipment (Units).

**Printing**

To print a unit data sheet, simply click on the Print button. To print various unit reports, see Maintenance Reports.

This help topic only covers the General section of Units. For more details on other portions of the Units screen select one of the topics below:

**See Also**

Units - General - General data relating to Units (equipment).
Units - Arranging Tabs - Explanation of how to arrange the lower tabs of the Units screen.
Units - Images & Barcodes - How to import images and how to generate barcodes.
Units - Vehicle Data - Explanation and sample of the vehicle related fields of Units.
Units - Lease & Warranty - Explanation and sample of the lease & warranty related fields of Units.
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Units - User Defined - Explanation of user definable fields and tabs.
Units - Notes - Explanation and sample of the notes fields of Units.
Units - Sources - Explanation and sample of the vendor and source related fields of Units.
Units - Scheduled Services - Explanation and sample of scheduling services for Units.
Units - Service History - Explanation and sample of service history on Units.
Units - Downtime - Explanation and sample of the downtime screen for units.
Units - Parts - Explanation of parts being associated with units.

### 6.2.3 Units - Arranging Tabs

**Access**

Maintenance / Units (Equipment) / Arrange Button

**Explanation**
The Units screen has several tabs along the bottom half of the screen. Each tab applies to a different aspect of the unit (equipment). You will not use every tab on every piece of equipment. You may find that some tabs are simply not applicable to your organization.

ExpressMaintenance allows you to turn on / off the displaying of each tab. In addition, it allows you to define the default tab that will be displayed first when the Units screen opens. To do this, click the button at the top of the Units screen for “Define Screen Layout.” Use the dialog to arrange and define the tabs to be displayed. This screen is also used to customize the screen layout and user definable fields.

See Also
Units - General - General data relating to Units (equipment).
Units - Arranging Tabs - Explanation of how to arrange the lower tabs of the Units screen.
Units - Images & Barcodes - How to import images and how to generate barcodes.
Units - Vehicle Data - Explanation and sample of the vehicle related fields of Units.
Units - Lease & Warranty - Explanation and sample of the lease & warranty related fields of Units.
Units - Attachments & Devices - Explanation and sample of attachments, device & valve related fields of Units.
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Units - Scheduled Services - Explanation and sample of scheduling services for Units.
Units - Service History - Explanation and sample of service history on Units.
Units - Downtime - Explanation and sample of the downtime screen for units.
Units - Parts - Explanation of parts being associated with units.

6.2.4 Units - Attachments

**Access**
Maintenance / Units / Attachments

**Explanation**
The Units screen of ExpressMaintenance is used to insert and maintain all data relating to equipment and other items. The screen contains the primary data in the upper half. More detailed data is found under the various tabs located in the lower half of the screen. This help topic covers the Units - Attachments & Devices

![Units Screen](image)

**Attachments**
Use the Attachments section to attach other application files to a unit. The files are not actually stored in ExpressMaintenance rather a reference to the file type and location. You can set the default path where files are stored under the Defaults section. You can also use this section to attach other Units to a Unit.

**Printing**
To print a unit data sheet, simply click on the Print button. To print various unit reports, see Maintenance Reports.
This help topic only covers the Attachments & Devices section of Units. For more details on other portions of the Units screen select one of the topics below:

**See Also**
- **Units - General** - General data relating to Units (equipment).
- **Units - Arranging Tabs** - Explanation of how to arrange the lower tabs of the Units screen.
- **Units - Images & Barcodes** - How to import images and how to generate barcodes.
- **Units - Vehicle Data** - Explanation and sample of the vehicle related fields of Units.
- **Units - Lease & Warranty** - Explanation and sample of the lease & warranty related fields of Units.
- **Units - Attachments & Devices** - Explanation and sample of attachments, device & valve related fields of Units.
- **Units - User Defined** - Explanation of user definable fields and tabs.
- **Units - Notes** - Explanation and sample of the notes fields of Units.
- **Units - Sources** - Explanation and sample of the vendor and source related fields of Units.
- **Units - Scheduled Services** - Explanation and sample of scheduling services for Units.
- **Units - Service History** - Explanation and sample of service history on Units.
- **Units - Downtime** - Explanation and sample of the downtime screen for units.
- **Units - Parts** - Explanation of parts being associated with units.

### 6.2.5 Units - Device

**Access**
Maintenance / Units / Device

**Explanation**
The Units screen of *ExpressMaintenance* is used to insert and maintain all data relating to equipment and other items. The screen contains the primary data in the upper half. More detailed data is found under the various tabs located in the lower half of the screen. This help topic covers the Units - Attachments & Devices
**Inserting / Editing**
To insert or edit a record, simply click the edit button on the ANSI the top of the screen.

**Data Fields**

**ANSII Pressure** - The rated anise pressure selected from a picklist of user definable Pressures.

**Relief Pressure** - The relief pressure selected from a picklist of user definable Pressures.

**Inlet Size** - The inlet size selected form a picklist of user definable Sizes.

**Outlet Size** - The outlet size selected form a picklist of user definable Sizes.

**Valve Size** - The valve size selected form a picklist of user definable Sizes.

**Valve Connector** - The type of valve connector as selected form a picklist of user definable Connector Types.

**Valve Type** - The valve type as selected from a picklist of Valve Types.

**PID Number** - The process ID number.

**Volts** - Applicable volts for the device.

**Amps** - The applicable amps for the device.
**Printing**
To print a unit data sheet, simply click on the Print button. To print various unit reports, see [Maintenance Reports](#).

This help topic only covers the Attachments & Devices section of Units. For more details on other portions of the Units screen select one of the topics below:

**See Also**
- **Units - General** - General data relating to Units (equipment).
- **Units - Arranging Tabs** - Explanation of how to arrange the lower tabs of the Units screen.
- **Units - Images & Barcodes** - How to import images and how to generate barcodes.
- **Units - Vehicle Data** - Explanation and sample of the vehicle related fields of Units.
- **Units - Lease & Warranty** - Explanation and sample of the lease & warranty related fields of Units.
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- **Units - Downtime** - Explanation and sample of the downtime screen for units.
- **Units - Parts** - Explanation of parts being associated with units.

### 6.2.6 Units - Downtime

**Access**
Maintenance / Units / Downtime

**Explanation**
The Units screen of *ExpressMaintenance* is used to insert and maintain all data relating to equipment and other items. The screen contains the primary data in the upper half. More detailed data is found under the various tabs located in the lower half of the screen. This help topic covers the Units - Downtime.
Inserting / Editing
To insert or edit a record, simply click the edit button on the data navigator at the top of the screen. Downtime records are also created automatically from the work order screen when downtime is included. Note that a separate downtime record is created for each down the unit is down.

Data Fields
Date Down - The date the unit was down.

Hours Down - The hours or fraction of hours the unit was down.

Reason - The reason the unit was down.

Work Order - The work order number if the information came from a work order.

Downtime Wizard
Use the Downtime / Lockout Wizard button to quickly enter downtime and lockout records. This data is also automatically entered from completed work orders where the same wizard is available.

Use this graph to visually track a record downtime.

Printing
To print a unit data sheet, simply click on the Print button. To print various unit reports, see Maintenance Reports.
Graphing
Clicking the "Graph Downtime" button will generate a graph of the downtime for the unit. You are prompted for a range of dates, etc.

This help topic only covers the Downtime section of Units. For more details on other portions of the Units screen select one of the topics below:

See Also
Units - General - General data relating to Units (equipment).
Units - Arranging Tabs - Explanation of how to arrange the lower tabs of the Units screen.
Units - Images & Barcodes - How to import images and how to generate barcodes.
Units - Vehicle Data - Explanation and sample of the vehicle related fields of Units.
Units - Lease & Warranty - Explanation and sample of the lease & warranty related fields of Units.
Units - Attachments & Devices - Explanation and sample of attachments, device & valve related fields of Units.
Units - User Defined - Explanation of user definable fields and tabs.
Units - Notes - Explanation and sample of the notes fields of Units.
Units - Sources - Explanation and sample of the vendor and source related fields of Units.
Units - Scheduled Services - Explanation and sample of scheduling services for Units.
Units - Service History - Explanation and sample of service history on Units.
Units - Downtime & Lockout - Explanation and sample of the downtime screen for units.
Units - Parts - Explanation of parts being associated with units.

6.2.7 Units - Lease & Warranty

Access
Maintenance / Units / Lease & Warranty

Explanation
The Units screen of ExpressMaintenance is used to insert and maintain all data relating to equipment and other items. The screen contains the primary data in the upper half. More detailed data is found under the various tabs located in the lower half of the screen. This help topic covers the Units - Lease & Warranty Data.
**Inserting / Editing**
To insert or edit a record, simply click the edit button on the data navigator at the top of the screen.

**Data Fields**

**Owned/Leased** - Indicates if the unit is owned or leased.

**Lease Company** - The lease company as selected from the picklist of Companies.

**Lease Start Date** - The lease term starting date.

**Lease End Date** - The lease term ending date.

**Lease Period** - The lease period as selected from the picklist which includes Hours, Days, Weeks, Months, Years & Miles.

**Lease Interval** - The lease interval which corresponds to the lease period.

**Warranty Start Date** - The warranty starting date.

**Warranty End Date** - The warranty ending date.

**Warranty Period** - The warranty period as selected from the picklist which includes Hours, Days, Weeks, Months, Years & Miles.

**Warranty Interval** - The warranty interval which corresponds to the lease period.
Printing
To print a unit data sheet, simply click on the Print button. To print various unit reports, see Maintenance Reports.

This help topic only covers the Lease & Warranty section of Units. For more details on other portions of the Units screen select one of the topics below:

See Also
Units - General - General data relating to Units (equipment).
Units - Arranging Tabs - Explanation of how to arrange the lower tabs of the Units screen.
Units - Images & Barcodes - How to import images and how to generate barcodes.
Units - Vehicle Data - Explanation and sample of the vehicle related fields of Units.
Units - Lease & Warranty - Explanation and sample of the lease & warranty related fields of Units.
Units - Attachments & Devices - Explanation and sample of attachments, device & valve related fields of Units.
Units - User Defined - Explanation of user definable fields and tabs.
Units - Notes - Explanation and sample of the notes fields of Units.
Units - Sources - Explanation and sample of the vendor and source related fields of Units.
Units - Scheduled Services - Explanation and sample of scheduling services for Units.
Units - Service History - Explanation and sample of service history on Units.
Units - Downtime & Lockout - Explanation and sample of the downtime screen for units.
Units - Parts - Explanation of parts being associated with units.

6.2.8 Units - Safety Notes

Access
Maintenance / Units / Safety Notes

Explanation
The Units screen of ExpressMaintenance is used to insert and maintain all data relating to equipment and other items. The screen contains the primary data in the upper half. More detailed data is found under the various tabs located in the lower half of the screen. This help topic covers the Units - Notes.
### 6.2.9 Units - Notes

**Access**
Maintenance / Units / Notes

**Explanation**
The Units screen of *ExpressMaintenance* is used to insert and maintain all data relating to equipment and other items. The screen contains the primary data in the upper half. More detailed data is found under the various tabs located in the lower half of the screen. This help topic covers the Units - Notes.

<table>
<thead>
<tr>
<th>Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Valve</td>
</tr>
<tr>
<td>Category</td>
<td>Pellet Mill</td>
</tr>
<tr>
<td>Make</td>
<td>Worcester</td>
</tr>
<tr>
<td>Model</td>
<td></td>
</tr>
<tr>
<td>Installed Date</td>
<td>12/10/2006</td>
</tr>
<tr>
<td>Site / Location</td>
<td>Pensacola Plant</td>
</tr>
<tr>
<td>Floor</td>
<td>3rd Floor</td>
</tr>
<tr>
<td>Serial #</td>
<td></td>
</tr>
<tr>
<td>Year</td>
<td></td>
</tr>
</tbody>
</table>

Use the safety notes section for equipment notes.
Inserting / Editing
To insert or edit a record, simply click the edit button on the data navigator at the top of the screen. Notes can be full rich text containing formatting characters and graphics. You can even paste notes from other applications such as Word. For more information on notes fields in ExpressMaintenance, please see the Notes Help Topic.

Data Fields
General Notes - Any general or specific notes you wish to enter about the unit. This is a large binary field and you can enter virtually unlimited information. You can double click on the field to open a larger window for entering notes.

Safety Notes - Any safety notes you wish to enter about the unit. This is a large binary field and you can enter virtually unlimited information. You can double click on the field to open a larger window for entering notes.

Printing
To print a unit data sheet, simply click on the Print button. To print various unit reports, see Maintenance Reports.

This help topic only covers the Notes section of Units. For more details on other portions of the Units screen select one of the topics below:
See Also
Units - General - General data relating to Units (equipment).
Units - Arranging Tabs - Explanation of how to arrange the lower tabs of the Units screen.
Units - Images & Barcodes - How to import images and how to generate barcodes.
Units - Vehicle Data - Explanation and sample of the vehicle related fields of Units.
Units - Lease & Warranty - Explanation and sample of the lease & warranty related fields of Units.
Units - Attachments & Devices - Explanation and sample of attachments, device & valve related fields of Units.
Units - User Defined - Explanation of user definable fields and tabs.
Units - Notes - Explanation and sample of the notes fields of Units.
Units - Sources - Explanation and sample of the vendor and source related fields of Units.
Units - Scheduled Services - Explanation and sample of scheduling services for Units.
Units - Service History - Explanation and sample of service history on Units.
Units - Downtime & Lockout - Explanation and sample of the downtime screen for units.
Units - Parts - Explanation of parts being associated with units.

6.2.10 Units - Parts

Access
Maintenance / Units / Parts

Explanation
The Units screen of ExpressMaintenance is used to insert and maintain all data relating to equipment and other items. The screen contains the primary data in the upper half. More detailed data is found under the various tabs located in the lower half of the screen. This help topic covers the Units - Parts. This tab allows you to associated various parts with a particular Unit. Parts can be associated with an unlimited number of units. The same data is accessible from the Parts Inventory screen.
Inserting / Editing
To insert or edit a record, simply click the edit button on the data navigator at the top of the screen.

Data Fields
Part Record - Select the part to be associated with the unit.

Printing
To print a list of associated parts, simply click on the Print button. To print various unit reports, see Maintenance Reports.

This help topic only covers the Parts section of Units. For more details on other portions of the Units screen select one of the topics below:

See Also
Units - General - General data relating to Units (equipment).
Units - Arranging Tabs - Explanation of how to arrange the lower tabs of the Units screen.
Units - Images & Barcodes - How to import images and how to generate barcodes.
Units - Vehicle Data - Explanation and sample of the vehicle related fields of Units.
Units - Lease & Warranty - Explanation and sample of the lease & warranty related fields of Units.
Units - Attachments & Devices - Explanation and sample of attachments, device & valve related fields of Units.
Units - User Defined - Explanation of user definable fields and tabs.
Units - Notes - Explanation and sample of the notes fields of Units.
Units - Sources - Explanation and sample of the vendor and source related fields of Units.
Units - Scheduled Services - Explanation and sample of scheduling services for Units.
Units - Service History - Explanation and sample of service history on Units.
Units - Downtime - Explanation and sample of the downtime screen for units.
Units - Parts - Explanation of parts being associated with units.

6.2.11 Units - Services (PMs)

Access
Maintenance / Units / Scheduled Services(PMs)

Explanation
The Units screen of ExpressMaintenance is used to insert and maintain all data relating to equipment and other items. The screen contains the primary data in the upper half. More detailed data is found under the various tabs located in the lower half of the screen. This help topic covers the Units - Scheduled Services.

Inserting / Editing
To insert or edit a record, simply click the edit button on the data navigator at the top of the screen.

Data Fields
Service - The name of the service selected from a picklist of user definable Services.

Status - The status of the scheduled service. Options include Normal, Picked, Assigned and InActive. Normal indicates that the service is scheduled and waiting to be assigned to a work order. Picked indicates the service has been selected in Service Overview screen to be issued on a work order. Assigned indicates the service is on a work order but work order has not been completed. InActive indicates the services is temporarily inactive and will be
ignored.

**Cost Center** - The cost center or maintenance code that applies to the service when applied to the unit.

**Separate WO** - When checked, the service will be placed on a separate work order. In the Service Overview screen, when work orders are automatically generated, they are grouped by Unit and Work Group and separate work orders are generated. With this field checked, a service is forced to be on a separate work order.

**Period** - The period for which the maintenance applies. Options include Hours, Days, Weeks, Months, Years and Miles. The count field controls Hours, Kilometers and Miles. Use the [Schedule Wizard](#) to set the Period, Interval, Basis and Logic in one simple screen.

**Interval** - The interval that corresponds to the Period. For Example: Period: Days, Interval: 90. See [Schedule Wizard](#) for more details.

**Basis** - Defines the bases on which the service will be re-scheduled when the work order is completed. The options are WOC - Work Order Completion Date and SVS - Service Scheduled Date. See [Schedule Wizard](#) for more details.

**Logic** - Defines the logic on which the service will be rescheduled which include the calculated date, a specified date or a particular week and day of the week. See [Schedule Wizard](#) for more details.

**Last Period Performed** - The period the service was last performed. This corresponds with the period field such as Miles.

**Last Date Performed** - The date the service was last performed.

**Scheduled Period** - The next scheduled period the service is to be performed.

**Scheduled Date** - The next scheduled date the service is to be performed. This is usually used only if a Period / Interval is not used.

**Labor Estimate** - The estimated labor in hours of the service.

**Cost Estimate** - The estimated cost of the service.

**Notes** - Specific notes that apply to the service when applied to the specific unit (equipment).

*Note*
Two additional buttons are found in the Scheduled Services section as shown and explained below:

**Apply Standard Services** The quickest and easiest way to get scheduled services inserted for a new unit is to click the Apply Standard Services button. This option will allow you to select another unit and have its services inserted for the current unit. Once inserted, you can edit the records or insert additional records.

**Schedule Wizard** The Scheduling Wizard is quick and easy interface to defining PM scheduling. Click the Schedule Wizard button to open the wizard dialog. Simply make the selection and click the OK button to have the service scheduled saved.

**Four Easy Steps**
1. **Select the Renewal Period** which will correspond to the remaining steps (example: Months).

2. **Select the Renewal Interval** to correspond with the renewal period (example: Months, 2).
3. **Select the Renewal Basis** to be used when the service is completed and rescheduled. Options include:
- Work Order Completion (WOC) - reschedule based on the date the service is complete in a work order. This is the way ExpressMaintenance handle rescheduling by default and has done so prior to version 5.6.
- Service Original Scheduled (SVS) reschedule based on the original scheduled date rather than completion date. This is not the default manner of rescheduling but is available as a result of requests from users for this feature. (example: Months, 2, WOC).

4. **Select the Renewal Logic** for setting the exact for the rescheduling of the service. Options include:
- Calculated Date (CD) - reschedules based on the exact date calculated from the selections in steps 1-3 (example: Months, 2, WOC, CD).
- Specified Date in Month (SDn) - reschedules based on the calculated date and then adjusted to the specific date of the month such as the 15th day of the month (example: Months, 2, WOC, SD15).
- Fixed Day of Week (FDn) - reschedules based on the calculated date and then adjusted to the specific day of the week within the month such as the 2nd Week, on Thursday (example: Months, 2, FD24).

**Service Parts**
By clicking on the Service Parts button, you can insert unlimited parts that are required for the service. These parts are then automatically included when a work order is created that includes the service.
Normally, services are completed via the completion of Work Orders. However, you can complete a service manually by selecting the desired service and then clicking the Complete Service button under Scheduled Services. A dialog will appear prompting for the Date Performed, New Period Count (miles, hours, etc) and the Employee who performed the service. Once a service is completed, it is automatically inserted into service history and the next scheduled period or date is determined. You can also insert service history data directly from the Service History portion of the Units screen.

**Printing**
To print a unit data sheet, simply click on the Print button. To print various unit reports, see Maintenance Reports.

This help topic only covers the Scheduled Services section of Units. For more details on other portions of the Units screen select one of the topics below:

**See Also**
- Units - General - General data relating to Units (equipment).
- Units - Arranging Tabs - Explanation of how to arrange the lower tabs of the Units screen.
- Units - Images & Barcodes - How to import images and how to generate barcodes.
- Units - Vehicle Data - Explanation and sample of the vehicle related fields of Units.
- Units - Lease & Warranty - Explanation and sample of the lease & warranty related fields of Units.
- Units - Attachments & Devices - Explanation and sample of attachments, device & valve related fields of Units.
- Units - User Defined - Explanation of user definable fields and tabs.
- Units - Notes - Explanation and sample of the notes fields of Units.
- Units - Sources - Explanation and sample of the vendor and source related fields of Units.
- Units - Scheduled Services - Explanation and sample of scheduling services for Units.
- Units - Service History - Explanation and sample of service history on Units.
- Units - Downtime - Explanation and sample of the downtime screen for units.
- Units - Parts - Explanation of parts being associated with units.

**6.2.12 Units - Service History**

**Access**
Maintenance / Units / Service History

**Explanation**
The Units screen of ExpressMaintenance is used to insert and maintain all data relating to equipment and other items. The screen contains the primary data in the upper half. More detailed data is found under the various tabs located in the lower half of the screen. This help topic covers the Units - Service History.
Inserting / Editing
To insert or edit a record, simply click the edit button on the data navigator at the top of the screen.

Complete Services
Normally, services are completed via the completion of Work Orders. However, you can complete a service manually by selecting the desired service and then clicking the Complete Service button under Scheduled Services. A dialog will appear prompting for the Date Performed, New Period Count (miles, hours, etc) and the Employee who performed the service. Once a service is completed, it is automatically inserted into service history and the next scheduled period or date is determined. You can also insert service history data directly from the Service History portion of the Units screen. Neither of these methods are recommended. We recommend using the work orders to populate the service as it provides much more detailed information about the services performed, parts used, etc.

Notes & More Information
You can see the full work order notes and other information by right-clicking on the work order number. When the popup menu appears, left click on Jump To Work Order.

Data Fields
Service - The name of the service selected from a picklist of user definable Services.
**Cost Center** - The cost center or maintenance code that applies to the service when applied to the unit.

**Performed By** - The name of the employee completing the service selected from a picklist of user defined Employees.

**Date Performed** - The date the service was completed.

**Work Order** - The work order number the service was completed through. You can right click and jump to the work order.

**Period Count** - The period count such as miles, days, months, etc.

**Labor Estimate** - The original estimated labor estimate for the service. See the work order for the actual labor.

**Cost Estimate** - The original cost estimate for the service. See the work order for the actual costs.

**Printing**
To print a unit data sheet, simply click on the Print button. To print various unit reports, see Maintenance Reports.

This help topic only covers the Service History section of Units. For more details on other portions of the Units screen select one of the topics below:

**See Also**
- **Units - General** - General data relating to Units (equipment).
- **Units - Arranging Tabs** - Explanation of how to arrange the lower tabs of the Units screen.
- **Units - Images & Barcodes** - How to import images and how to generate barcodes.
- **Units - Vehicle Data** - Explanation and sample of the vehicle related fields of Units.
- **Units - Lease & Warranty** - Explanation and sample of the lease & warranty related fields of Units.
- **Units - Attachments & Devices** - Explanation and sample of attachments, device & valve related fields of Units.
- **Units - User Defined** - Explanation of user definable fields and tabs.
- **Units - Notes** - Explanation and sample of the notes fields of Units.
- **Units - Sources** - Explanation and sample of the vendor and source related fields of Units.
- **Units - Scheduled Services** - Explanation and sample of scheduling services for Units.
- **Units - Service History** - Explanation and sample of service history on Units.
- **Units - Downtime & Lockout** - Explanation and sample of the downtime screen for units.
- **Units - Parts** - Explanation of parts being associated with units.

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6.2.13 Units - Sources

**Access**
Maintenance / Units / Sources

**Explanation**
The Units screen of ExpressMaintenance is used to insert and maintain all data relating to equipment and other items. The screen contains the primary data in the upper half. More detailed data is found under the various tabs located in the lower half of the screen. This help topic covers the Units - Sources.

**Inserting / Editing**
To insert or edit a record, simply click the edit button on the data navigator at the top of the screen.

**Main Data Fields**
- **Primary Vendor** - The primary vendor for purchasing the product as selected from the list of Vendor Sources (see below).
- **Vendor #** - The vendor’s part or stock number.
- **Manufacturer** - The manufacturer of the unit as selected from the picklist of user definable Vendors.
**Mfg Number** - The manufacturer's part or stock number.

**Acquisition Date** - The acquisition date of the unit.

**Acquisition Cost** - The acquisition cost of the unit.

**Additional Cost** - Any additional costs associated with acquisition of the unit.

**Vendor Sources Data Fields**

- **Vendor** - The vendor name as selected from the picklist of user definable Vendors.

- **Price** - The price the vendor charges for the Unit.

**Printing**

To print a unit data sheet, simply click on the Print button. To print various unit reports, see Maintenance Reports.

This help topic only covers the Sources section of Units. For more details on other portions of the Units screen select one of the topics below:

**See Also**

- **Units - General** - General data relating to Units (equipment).
- **Units - Arranging Tabs** - Explanation of how to arrange the lower tabs of the Units screen.
- **Units - Images & Barcodes** - How to import images and how to generate barcodes.
- **Units - Vehicle Data** - Explanation and sample of the vehicle related fields of Units.
- **Units - Lease & Warranty** - Explanation and sample of the lease & warranty related fields of Units.
- **Units - Attachments & Devices** - Explanation and sample of attachments, device & valve related fields of Units.
- **Units - User Defined** - Explanation of user definable fields and tabs.
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- **Units - Sources** - Explanation and sample of the vendor and source related fields of Units.
- **Units - Scheduled Services** - Explanation and sample of scheduling services for Units.
- **Units - Service History** - Explanation and sample of service history on Units.
- **Units - Downtime** - Explanation and sample of the downtime screen for units.
- **Units - Parts** - Explanation of parts being associated with units.

### 6.2.14 Units - Work Orders

**Access**

Maintenance / Units (Equipment) / Data View / Work Orders

**Explanation**
The Units screen of Express Maintenance is used to insert and maintain all data relating to equipment and other items. The screen contains the primary data in the upper half. More detailed data is found under the various tabs located in the lower half of the screen. This help topic covers the Units - Work Order.

Inserting / Editing
To insert or edit a record, simply click the edit button on the data navigator at the top of the screen.

Jump to Work Order
Select your work order and click the button to quickly view the select work order

Show Options
Use the drop down arrow to select from different options.
**Printing**
To print a unit work order, simply click on the Print button. To print various unit reports, see [Maintenance Reports](#).

This help topic only covers the Work Order section of Units. For more details on other portions of the Units screen select one of the topics below:

**See Also**
- **Units - General** - General data relating to Units (equipment).
- **Units - Arranging Tabs** - Explanation of how to arrange the lower tabs of the Units screen.
- **Units - Images & Barcodes** - How to import images and how to generate barcodes.
- **Units - Vehicle Data** - Explanation and sample of the vehicle related fields of Units.
- **Units - Lease & Warranty** - Explanation and sample of the lease & warranty related fields of Units.
- **Units - Attachments & Devices** - Explanation and sample of attachments, device & valve related fields of Units.
- **Units - User Defined** - Explanation of user definable fields and tabs.
- **Units - Notes** - Explanation and sample of the notes fields of Units.
- **Units - Sources** - Explanation and sample of the vendor and source related fields of Units.
- **Units - Scheduled Services** - Explanation and sample of scheduling services for Units.
- **Units - Service History** - Explanation and sample of service history on Units.
- **Units - Downtime** - Explanation and sample of the downtime screen for units.
- **Units - Parts** - Explanation of parts being associated with units.

### 6.2.15 Update Counts

**Access**
Maintenance / Update Counts

**Explanation**
Services (PMs) can be scheduled and tracked for each unit on a number of periods such as weeks, days and months. In addition, the services can be scheduled based on a count field such as miles, kilometres or Hours. The Count field in the units screen is used to track preventative maintenance in these situations. Actually, the count can be based on anything that involves a simple counter.
However, unlike dates, ExpressMaintenance has no direct way of knowing the latest count of a particular unit and therefore cannot determine or list services due in the Services Overview screen. The solution for this is to periodically update the Current Count field in the Units (Equipment) screen. This can be done in three ways as outlined below:

**Three Ways To Update Unit Counts**
1. Update the Current Count field in the Units screen one record at a time.
2. Use the Update Counts screen and quickly enter the current count for each unit in grid format.
3. Use the Update Counts screen and import current counts from another dataset or file (access, excel, etc) based on an ODBC Datasource.

Option 1 is self explanatory and is not the best choice for updating current counts.

Option 2 is the most commonly used method of updating counts. All Units with something greater than 0 are listed in the grid and can be quickly updated to their latest count. Be sure to click the Update button to save all new counts entered.

**Importing From Datasource**
Option 3 is helpful in situations where your equipment is linked to some type of automated systems and the current count is readily available in digital format. The user is assumed to have some knowledge of ODBC database setup in Windows to utilize this feature. You must have a table of spreadsheet which contains at least the following three fields:

- Name - The name of the unit being updated.
- Count - The current count of the unit.
- Date - The date that corresponds with the count being imported.

You will be prompted for a user login name, password and ODBC DSN. Once the ODBC
DSN is entered and connected, you should select a table from which the import will come. Next, click Ok and the data will be imported into the Update Counts screen. Be sure to click the Update button to save all new counts imported.

### 6.2.16 Units - User Defined

**Access**
Maintenance / Units (Equipment) / Data View / User Defined

**Explanation**
The Units screen of *ExpressMaintenance* is used to insert and maintain all data relating to equipment and other items. The screen contains the primary data in the upper half. More detailed data is found under the various tabs located in the lower half of the screen. This help topic covers the Units - User Defined.

Use user defined fields for anything you wish to track that has not been included in the standard fields. Many users make the User Defined tab their primary tab that appears first and use the fields for data very specific to their needs. Others find no need for the user defined tab and turn it off since the other standard fields address all of their data tracking needs.

**Inserting / Editing**
To insert or edit a record, simply click the edit button on the data navigator at the top of the screen.
**Selection Lists / Codes**
You can setup a selection list for each user definable field under Administration / Codes by enter the list of codes for the desired user field and clicking the Enabled checkbox.

**Data Fields**
*ExpressMaintenance* includes 21 user definable fields. You can also define the caption of the User Defined tab. To change the caption of the tab or any of the fields, please use Administration / Defaults or the Screen Layout button at the top of the Units screen. Since the changes are system wide, access to this option is limited to user accounts with full permission to Administration / Defaults.

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**See Also**
- **Units - General** - General data relating to Units (equipment).
- **Units - Arranging Tabs** - Explanation of how to arrange the lower tabs of the Units screen.
- **Units - Images & Barcodes** - How to import images and how to generate barcodes.
- **Units - Vehicle Data** - Explanation and sample of the vehicle related fields of Units.
- **Units - Lease & Warranty** - Explanation and sample of the lease & warranty related fields of Units.
- **Units - Attachments & Devices** - Explanation and sample of attachments, device & valve related fields of Units.
- **Units - User Defined** - Explanation of user definable fields and tabs.
Units - Notes - Explanation and sample of the notes fields of Units.
Units - Sources - Explanation and sample of the vendor and source related fields of Units.
Units - Scheduled Services - Explanation and sample of scheduling services for Units.
Units - Service History - Explanation and sample of service history on Units.
Units - Downtime & Lockout - Explanation and sample of the downtime screen for units.
Units - Parts - Explanation of parts being associated with units.

6.2.17 Units - Vehicle

Access
Maintenance / Units (Equipment) / Data View / Vehicles

Explanation
The Units screen of ExpressMaintenance is used to insert and maintain all data relating to equipment and other items. The screen contains the primary data in the upper half. More detailed data is found under the various tabs located in the lower half of the screen. This help topic covers the Units - Vehicle Data.

Inserting / Editing
To insert or edit a record, simply click the edit button on the data navigator at the top of the screen.

Data Fields
Owned / Leased - Indicates if the vehicle is owned or leased.
Beginning Hub - The beginning hub or odometer reading at the in-service date.

Current Hub - The most recently saved hub or odometer reading.

State Licensed - The state in which the vehicle is licensed.

License # - The license number of the vehicle.

License Renewal - The date for renewal of the vehicle license.

Fuel Type - The type of fuel used by the vehicle or unit, select from the picklist of Fuels.

Tires - The type and / or size of tires required by the unit.

Weight - The weight of the unit.

VIN # - The vehicle identification number of the vehicle.

Sleeper - Checkbox to indicate if the vehicle has a sleeper.

Body / Year - The body type and year if applicable.

Chassis / Year - The chassis type and year if applicable.

Trans / Year - The transmission type and year.

Engine / Year - The engine type and year.

Engine Number - The engine number or serial number.

Engine Model - The engine model.

**Printing**

To print a unit data sheet, simply click on the Print button. To print various unit reports, see Maintenance Reports.

This help topic only covers the Vehicle Data section of Units. For more details on other portions of the Units screen select one of the topics below:

**See Also**

Units - General - General data relating to Units (equipment).

Units - Arranging Tabs - Explanation of how to arrange the lower tabs of the Units screen.

Units - Images & Barcodes - How to import images and how to generate barcodes.
6.2.18 Units - Reports

Access
Maintenance / Equipment / Reports

Explanation
The Maintenance / Reports screen is divided into two sections. The left panel includes certain parameters that can be passed to each report (when applicable). These parameters include picklists for selection or can be left to the default of "All". The right panel of the screen provides a complete list of pre-designed reports that are available.

All reports relating to Units, Services and Work Orders are found in the Maintenance / Reports screen. Reports relating to Parts or Purchase Orders are found under their respective menu sections.
Note
For more information on generating reports, see the Reporting section under Getting Started. Users can edit existing reports or create their own reports using the built-in report designer.

6.2.19 Units - Images & Barcodes

Access
Maintenance / Units (Maintenance) / Data View

Explanation
The Units screen of ExpressMaintenance is used to insert and maintain all data relating to equipment and other items. The screen contains the primary data in the upper half. More detailed data is found under the various tabs located in the lower half of the screen. This help topic covers the Units - Images & Barcodes.
Inserting / Editing Image

When in the Units screen, you can save an image or picture for the unit. The easiest way to do this is to open the image with your favorite edit or scanner and save the image to the clipboard. Then, right click on the image box of the Units screen and select Paste. The image will be proportionally adjusted in size to fit the image box. Virtually all formats of graphic images are supported including bmp, jpg, jpeg, gif, png, tiff, etc.

The popup menu is accessible by right clicking on the image box of the Units screen. From that menu, you have several options:

- **Copy** - Copies the Unit image box to the clipboard.
- **Paste** - Pastes the clipboard image to the Unit image box.
- **Clear Image** - Clears or erases the image from the Unit image box.
- **Image Editor** - Calls your favorite image edit as defined in Defaults, for the purpose of editing or adding to the image.
- **Full View** - Displays the image in its actual size and full view. Also allows you to print the image (see screen shot below).
Note: You can also attach an unlimited number of files (word, excel, graphics, etc) to a unit under the Attachments Tab.

Changing / Printing Barcodes
Barcoding is simply a digital barcode projection of one or more key fields. You can use the built-in Report Builder to include barcodes in any report and on any field. To edit or print the barcode on a unit, click the Barcode button that appears at the top of the screen as shown below:

You can also customize reports and labels to print barcodes as desired as shown below:
For more information on printing barcodes, please see the Report Builder help.

ExpressMaintenance will allow you to read barcodes at any point in the program where it prompts for a Part Description, Part Number or Vendor Part Number. Scanning a barcode has the effect of entering the field value and pressing the Enter or Tab key. For more information on barcodes, visit our website at www.ExpressTechnology.com.

Use the report designer to assign which field to be used to generate the barcode and to layout the barcode labels.

This help topic only covers the Image & Barcodes section of Units. For more details on other portions of the Units screen select one of the topics below:

See Also
6.3 **Work Orders**

The Maintenance Menu of *ExpressMaintenance* includes access to the Work Orders.

**Notes**

Work Orders is actually a broad term that refers to the overview and review of services that are due, the assignment of those services and the tacking of services performed along with costs and other data. The multi-purpose Work Order screen is accessed from the Maintenance Menu as shown below:

![Work Orders Menu Screenshot](image)

The Maintenance Menu appears small because most of the options are combined into a single tabbed window for simple one-click access. For example, within the Work Orders option, users can review maintenance issues that are due as well as create, assign, print and update work orders all from the same window. The Work Orders section of this help covers the following topics:

**Work Order Help Topics**

*ExpressRequest* - Managing maintenance request from other users and converting them to
work orders.

Service Overview - Managing and reviewing services due (PMs) and converting them into work orders.

Creating Work Orders - Flagging services due and creating work orders.

Work Orders Overview - A quick way to view scheduled and completed work orders.

Editing / Updating Work Orders - Editing or adding information to work orders and completing work orders.

Printing Work Orders - Printing work orders and work order related reports.

6.3.1 Work Orders Overview

Access
Maintenance / Work Orders / Work Order Overview

Explanation
Work Orders can be searched or located with the overview screen or the search screen. The Work Orders Overview screen provides much flexibility and is a quick way to view scheduled (open) invoices. Numerous search options are available as shown in the screen shot below:

![Work Orders Overview Screen](image)

Editing
To quickly edit a work order, double click on the desired work order. The screen will automatically change to the Work Orders tab where the selected work order will be displayed and ready for editing / printing.

**Category Limiting**
You can limit the selection list of services and / or parts. To do this, simply click the checkbox for Only Pick From Matching Unit Category. The program will only include services and / or parts that have the same Category as the Unit Category. Category codes are defined under Administration / Codes and selected on the Units, Services and Parts screen.

**Work Order Help Topics**
- ExpressRequest - Managing maintenance request from other users and converting them to work orders.
- Service Overview - Managing and reviewing services due (PMs) and converting them into work orders.
- Creating Work Orders - Flagging services due and creating work orders.
- Work Orders Overview - A quick way to view scheduled and completed work orders.
- Editing / Updating Work Orders - Editing or adding information to work orders and completing work orders.
- Printing Work Orders - Printing work orders and work order related reports.

### 6.3.2 Creating Work Order

**Access**
Maintenance / Work Orders

**Creating Work Orders - 3 Methods**
There are 3 ways of creating work orders:
1. Create work orders from scheduled services (PMs) using the Services Overview screen.
2. Create work orders from maintenance requests (ExpressRequest) using the Requests screen.
3. Insert manual work orders using the insert button on the Work Order screen.

1. **Creating Work Orders from Service Overview (PMs)**
In the Service Overview screen, search for services due. Next, select the desired services for work order creation by clicking in the pick box of each service. Alternatively, you can click the "Select All" button. After the desired items are selected, click the "Create Work Orders" button. Services are placed on separate work orders by Unit and Work Group. If a service is checked for SeparateWO, then the service will also be placed on a separate work order of its own.

2. **Creating Work Orders from Requests**
In Requests screen, view the maintenance requests that have been submitted. Select a request by clicking on the record in the grid. Click the "Assign Work Order" button or right
click to create a work order for the maintenance request. You can only convert one request at a time to a work order.

**Finishing The Process**

Using either of the two methods described above, the following dialog box will appear:

Simply select the employee / department to perform the work order and the scheduled date for the work order. When you have completed the dialog box, click Ok to have the work order(s) created. The following dialog screen will appear when the work orders are created:

You can print the work order at this time. Alternatively, you can create other work orders and edit or print them later. See the other help topics shown below for details on editing and printing work orders. Work Orders can be manually created (inserted) directly in the Work Order screen. See the topic on [Updating Work Orders](#) for more details.

### 3. Creating Manual Work Orders

There are times when it is necessary to create a work order that is not the result of scheduled services or a maintenance request. To do this, simply click on the Work Order screen and click the Insert button on the data navigator. Proceed by selecting the Unit, Services and other pertinent information for the work order. To print, click on the print button for the work order worksheet.

**Editing Work Orders**

When you have completed creating work orders, you can click the Work Orders tab. The work orders just created will be in memory and available for review, further edits and printing. For more information on editing invoices, see the help topic [Updating Work Orders](#).

**Work Order Help Topics**

- **ExpressRequest** - Managing maintenance request from other users and converting them to work orders.
- **Service Overview** - Managing and reviewing services due (PMs) and converting them into work orders.
- **Creating Work Orders** - Flagging services due and creating work orders.
- **Work Orders Overview** - A quick way to view scheduled and completed work orders.
- **Editing / Updating Work Orders** - Editing or adding information to work orders and completing work orders.
- **Printing Work Orders** - Printing work orders and work order related reports.
### 6.3.3 Updating Work Orders

**Access**
Maintenance / Work Orders

**Explanation**
When you first access the Work Orders screen, the Service Overview tab is selected. To makes edits to a work order, you must first locate the work order. There are two ways to locate a work order.

1. Use the Work Orders Overview tab to view work orders and make a selection.
2. Click the Search button from the Work Orders tab and search for a work order.

Once a work order is selected, it will appear in the work order tab. You can of course, insert a new work order from the Work Orders tab without performing any type of search.

**Searching Work Orders**
Begin by clicking on the Search button of the Work Orders screen. The following search screen will appear:

Enter the desired search field and the data value. Click search and the record(s) meeting the criteria will be located. If only one record is found, the screen will close and return to the Work Order main screen with the record displayed. If more than one record is found, the resulting records will be listed in the grid for selection. For more information on using the Search features of ExpressMaintenance, see the Search Button help topic under Getting Started.

**Editing / Updating Work Order**
Once the desired Work Order(s) are located, the Work Order screen will be displayed with the first record found as shown below. You can then use the data navigator to make edits to the work order including the services and parts data.

**Completing Work Orders**
As you can see from the screen shot above, this work order has been created but no information concerning the completion of the work order has been entered. You will then want to enter all completion data such as completion date, labor time and parts used as shown above. You can add as many services and parts as needed when completing a work order.

**Data Fields**
The following is an explanation of each data field on the Work Orders screen:

**Main Panel**
- **Unit** - The name of the unit for which the work order applies.
- **Site** - The site inherited from the Unit record when selected.
Company - The company for whom the work was performed (defaults to your company).
Scheduled - The date the work order was scheduled to be performed.
Completed - The date the work order was completed.
Reference - User field to reference anything desired.
Category - The category of the work order as defined in Administration / Codes.
Requester - If the work order came from ExpressRequest, this field will contain the requester's name.
Work Group - The work group inherited from the service(s) selected when the work order was created.
Employee - The employee responsible for completion of the work order.
Labor Hours - The total labor hours spent on the work order (auto calcs from services detail section).
Labor Rate - The labor rate to apply to the work order which defaults as setup in Defaults.
Period Count - The miles or hours reflected on the unit at completion of the work order.
Downtime - Downtime in hours that the unit was down associated with the work order.
Notes - Any notes or comments about the work order (right click for full screen editing).
Auto Calc Total - When checked, the totals are automatically calculated and displayed. Otherwise, user can edit them.
Auto Add Standard Part - When checked, the standard auto charge will be applied in the parts section as setup in Administration / Configuration / Work Order Defaults / Charges & Auto Apply Settings.
Labor Cost - The labor cost auto computed from the Labor Hours and Labor Rate.
Parts Cost - The total parts cost auto computed from the services detail section.
Taxes - The taxes if applicable computed from the total cost based on tax rate defined in Configuration.
Other Cost - Any other costs as manually entered by the user.
Total Cost - The total cost of the work order as calculated automatically.

Services Detail Panel
Service - The name of the service performed selectable from a picklist of services.
Cost Center - Optional budget category or expense code for the service.
Employee - The employee performing the specific service.
Performed - The date / time the service was performed.
Labor Rate - The labor rate for the employee performing the specific service.
Labor Hours - The total labor time in hours spent on the service item.
Labor Cost - The labor cost auto calculated by the labor hours and labor rate or manually entered.
Completed - Checkbox to indicate if service was completed.
Estimated Labor - The estimated labor time hours for the service.
Estimated Cost - The estimated cost for the service.

Parts Detail Panel
Part Number - The part number of the part used selectable from a picklist of parts.
Description - The descriptive name of the part after selection.
Cost Center - Optional budget category or expense code for the part.
Quantity - The quantity used of the part.
Cost - The cost per unit of the part, defaults to value in Parts table.
Parts Cost - The computed cost of the parts based on the quantity and the cost.

Note: Other fields are available. You can include them by clicking on the Grid Properties button to display and arrange grid columns.

Category Limiting
You can limit the selection list of services and / or parts. To do this, simply click the checkbox for Only Pick From Matching Unit Category. The program will only include services and / or parts that have the same Category as the Unit Category. Category codes are defined under Administration / Codes and selected on the Units, Services and Parts screen.

Work Order Help Topics
ExpressRequest - Managing maintenance request from other users and converting them to work orders.
Service Overview - Managing and reviewing services due (PMs) and converting them into work orders.
Creating Work Orders - Flagging services due and creating work orders.
Work Orders Overview - A quick way to view scheduled and completed work orders.
Editing / Updating Work Orders - Editing or adding information to work orders and completing work orders.
Printing Work Orders - Printing work orders and work order related reports.

6.3.4 Printing Work Orders

Access
Maintenance / Work Orders

Explanation
Work Orders can be printed in any of four ways:

1. From the Maintenance / Service Overview screen when prompted immediately after creating new work orders.
2. From the Maintenance / Requests screen when prompted immediately after creating a work order.
3. From the Maintenance / Work Orders screen after inserting, editing or using the Search button to locate the work order.
4. From the Maintenance / Reports screen by entering a range of work order numbers and printing the work orders.
Worksheets & Completed Forms
You can print a work order worksheet or a completed form. Worksheets are designed for the technician to complete. You can customize the work order forms and worksheets to meet your company needs.

Emailing Work Orders
You can email work orders automatically by clicking the email button. ExpressMaintenance includes options to email the work order to the customer, employee and unit assigned recipients (unit screen). To setup email options, please see the Administration / Configuration / Work Order Defaults help topic.

Work Order Help Topics
ExpressRequest - Managing maintenance request from other users and converting them to work orders.
Service Overview - Managing and reviewing services due (PMs) and converting them into work orders.
Creating Work Orders - Flagging services due and creating work orders.
Work Orders Overview - A quick way to view scheduled and completed work orders.
Editing / Updating Work Orders - Editing or adding information to work orders and completing work orders.
Printing Work Orders - Printing work orders and work order related reports.

6.3.5 Work Order Data

Access
Maintenance / Work Orders / Work Order Data

Explanation
6.3.6 Express Requests

Access
Maintenance / Requests

Explanation
If you have purchased a copy of ExpressRequest, you can provide users with a short cut to ExpressRequest.exe. This program allows non-maintenance users to enter maintenance requests in a simple easy to use screen or via an internet web page. Users do not necessarily have to know the unit name or proper service to provide. They can simply enter a description of the equipment and service needed or problem. A separate help file system is included with ExpressMaintenance.

Viewing Requests
Requests appear in this screen grouped by status. You will want to view the "Replies" and "Submitted" requests for work order consideration. You can click on any of the other status codes in the left panel to view other requests.

Printing Requests
You can also print a list of the requests displayed in the screen by clicking the Print button.

Selecting Request To Create Work Orders
In order to generate a work order from a submitted request, you must first assign a valid Unit and a valid Service to the request. Then, click the "Assign Work Order" button. You will be prompted for the scheduled date and assigned employee. The work order will be created and the requester will be notified.

For details on creating work orders from the selected request record, see that help section.
Notification / Alerts
ExpressMaintenance includes a notification system to alert users when new Requests arrive or new Services (PMs) are due. For more details, see the help topic on Administration / User Accounts.

Work Order Help Topics
ExpressRequest - Managing maintenance request from other users and converting them to work orders.
Service Overview - Managing and reviewing services due (PMs) and converting them into work orders.
Creating Work Orders - Flagging services due and creating work orders.
Work Orders Overview - A quick way to view scheduled and completed work orders.
Editing / Updating Work Orders - Editing or adding information to work orders and completing work orders.
Printing Work Orders - Printing work orders and work order related reports.

6.3.7 Service Overview

Access
Maintenance / Service Overview

Explanation
When you first access the Work Orders screen, the Service Overview tab is selected. The Service Overview tabbed screen provides an immediate glimpse of all pending services due
(PMs) sorted by Unit Name & Service Due Date. Services (PMs) shown in this screen are taken from all the Units / Scheduled Services (PMs) screen.

**Searching Services Due**
By default, the Service Overview screen displays all services due sorted by Unit Name & Service Due Date. You can limit the services displayed by completing the search fields and clicking on the Search button and insert the desired date range. You can also set the default date range under Administration / Defaults / Work Order Defaults.

**Printing Services Due**
You can also print a list of the services displayed in the screen by clicking the Print button.

**Selecting Services To Create Work Orders**
In order to create and print work orders, you must select the services you wish to order (have work orders created). Several methods are available for selecting services that need to be performed. You can click services one at a time by clicking in the left column labeled Pick. Clicking on an already selected item will unselect that item. More importantly, you can click the “Selection” button to select every item listed or items by unit. You can also unselect items you do not wish to have performed by clicking on the “Selection” button.

Services are placed on separate work orders by Unit and Work Group. If a service is checked for SeparateWO, then the service will also be placed on a separate work order of its own.

For details on creating work orders from the picked services, see that help section.

**Column Explanations**
**Pick** - Check box field to toggle on / off the selecting of a service to be used for creating work orders.
**Unit Name** - The name of the unit to which the service applies.

**Service** - The name of the service that applies to the unit.

**Parts** - If parts are associated with the service, the number will be listed. Click on the expand button to view a full list.

**Scheduled Date** - The next scheduled date for the services.

**Last Performed Date** - The date the service was last performed.

**Next Scheduled** - The next scheduled date or count (miles, hours, etc.) for the service.

**From Now** - The days or count difference from the current date for which the service is due.

**Current Count** - The current count (miles, hours, etc.) for the scheduled services.

**Last Count Performed** - The count (miles, hours, etc.) the last time the service was performed.

**Period** - The period for which the service should be performed and rescheduled. Options include Days, Hours, Miles, Months, Weeks & Years. This is only the default and the actual service period can be changed at the Unit (equipment) level. This field corresponds with the Interval field.

**Interval** - The interval in which the service should be performed and rescheduled. This field corresponds with the Period field. For example if "Days" is selected in the Period field and "60" is entered in the Interval field, then the service is to be performed every 60 days.

**Other Fields** - Other fields are available for display only.

**Notification / Alerts**
ExpressMaintenance includes a notification system to alert users when new Requests arrive or new Services (PMs) are due. For more details, see the help topic on Administration / User Accounts.

**Work Order Help Topics**
- ExpressRequest - Managing maintenance request from other users and converting them to work orders.
- Service Overview - Managing and reviewing services due (PMs) and converting them into work orders.
- Creating Work Orders - Flagging services due and creating work orders.
- Work Orders Overview - A quick way to view scheduled and completed work orders.
• Editing / Updating Work Orders - Editing or adding information to work orders and completing work orders.
• Printing Work Orders - Printing work orders and work order related reports.

6.3.8 Update Counts

Access
Maintenance / Update Counts

Explanation
Services (PMs) can be scheduled and tracked for each unit on a number of periods such as weeks, days and months. In addition, the services can be scheduled based on a count field such as miles, kilometres or Hours. The Count field in the units screen is used to track preventative maintenance in these situations. Actually, the count can be based on anything that involves a simple counter.

However, unlike dates, ExpressMaintenance has no direct way of knowing the latest count of a particular unit and therefore cannot determine or list services due in the Services Overview screen. The solution for this is to periodically update the Current Count field in the Units (Equipment) screen. This can be done in three ways as outlined below:

Three Ways To Update Unit Counts
1. Update the Current Count field in the Units screen one record at a time.
2. Use the Update Counts screen and quickly enter the current count for each unit in grid
3. Use the Update Counts screen and import current counts from another dataset or file (access, excel, etc) based on an ODBC Datasource.

Option 1 is self explanatory and is not the best choice for updating current counts.

Option 2 is the most commonly used method of updating counts. All Units with something greater than 0 are listed in the grid and can be quickly updated to their latest count. Be sure to click the Update button to save all new counts entered.

**Importing From Datasource**

Option 3 is helpful in situations where your equipment is linked to some type of automated systems and the current count is readily available in digital format. The user is assumed to have some knowledge of ODBC database setup in Windows to utilize this feature. You must have a table of spreadsheet which contains at least the following three fields:

- **Name** - The name of the unit being updated.
- **Count** - The current count of the unit.
- **Date** - The date that corresponds with the count being imported.

You will be prompted for a user login name, password and ODBC DSN. Once the ODBC DSN is entered and connected, you should select a table from which the import will come. Next, click Ok and the data will be imported into the Update Counts screen. Be sure to click the Update button to save all new counts imported.

### 6.4 Parts Inventory

**Access**

Parts Inventory / Parts Inventory

**Explanation**

The Parts screen of ExpressMaintenance consists of two tabs. The tabbed names are Overview and Data View. The Overview screen is first displayed as shown below:
The Parts Overview screen does not allow for editing of data. However, it provides an excellent way of locating a part or reviewing several parts at one time. Editing is done from the Parts panel. You can double click on a specific part in the Overview panel and the program will automatically switch to the Parts Panel for editing.

**Locating A Part**
There is a Quick Position field at the top of the screen that performs a quick position to parts as you type in a portion of the part description. You can also use the Search button.

**Sorting Records**
The default soft order of the parts records is according to your setup under Administration / Parts Defaults. However, you can instantly change the sort order of the records by clicking on the title button for the desired column. Clicking the button a second time will sort in descending order as opposed to ascending order.

**Performance / Speed**
By default, all records are retrieved in the query when the Unit screen is opened. This is really for demo purposes more than anything else. Once you have a substantial number of records in the system, we recommend that you turn off this feature and search for the set of parts or the part you wish to view / edit. You can turn the “Query All Parts On Open” option
off under Administration / Defaults / Parts Defaults.

**Editing**
Users can quickly edit a part by double clicking on the selected part record. The screen will automatically change to the Parts tab and the record will be displayed for editing.

**Note**
Remember that the ExpressMaintenance grids can remember your column layouts. Move the columns around as desired and they will remain in the desired order each time you run the program as explained in the Data Grids section of Getting Started.

**Parts Help Topics**
- **Parts - Inventory Analysis** - Convenient screen for quick overview of parts inventory activity.
- **Parts - Overview** - The overview screen of parts.
- **Parts - General** - General data relating to parts.
- **Parts - Receiving** - The entry of parts purchased and received.
- **Parts - Receiving - By Import** - Receiving parts by importing from barcode csv file.
- **Parts - Re-Ordering** - General data relating to parts.
- **Parts - Reports** - Reporting on Parts inventory and purchases.
- **Parts - Transferring** - General data relating to parts.

### 6.4.1 Parts - Overview

The Parts Inventory menu of *ExpressMaintenance* is used to maintain data about the Parts inventory, Parts Receiving and Parts Reports. Parts inventory is effected by two aspects of ExpressMaintenance:

- Increasing Parts Inventory - [Parts / Receiving](#)
- Decreasing Parts Inventory - [Completed Work Orders](#)
- Increasing & Decreasing Parts Inventory - [Parts Transferring](#)

The Parts Menu is shown below:

![Parts Menu](image)

The Parts section of this help covers the following topics:

**Parts Help Topics**
- **Parts - Inventory Analysis** - Convenient screen for quick overview of parts inventory activity.
- **Parts - Overview** - The overview screen of parts.
**Parts - General** - General data relating to parts.
**Parts - Receiving** - The entry of parts purchased and received.
**Parts Receiving by Import** - Receiving parts by importing from barcode csv file.
**Parts - Re-Ordering** - General data relating to parts.
**Parts - Reports** - Reporting on Parts inventory and purchases.
**Parts - Transferring** - General data relating to parts.

### 6.4.2 Parts - General

#### Access
Parts Inventory / Parts Inventory / Data View

#### Explanation
The Parts screen of *ExpressMaintenance* consists of three tabbed panels. The tabbed names are Overview, Parts and Purchases. This allows users to manage everything related to Parts from a single screen. The Parts panel contains all data relating to a specific part and allows for editing as shown below:

![Parts Inventory Screen](image)

#### Inserting / Editing
To insert or edit a record, simply click the edit button on the *data navigator* at the top of the screen.

#### Data Fields
- **Description** - The name / description of the part.
**Part Number** - Optional part number. You can have ExpressMaintenance automatically number parts and optionally include a prefix. See topic for [Administration / Defaults / Parts Defaults](#).

**Type** - The part type which is a defined user type. The Parts Type selection list is setup under [Administration / Codes](#).

**Category** - The category for the part as selected from a picklist of user definable parts categories.

**Primary Vendor** - The primary vendor for the part as selected from a picklist of user definable vendors.

**Vendor Part Number** - The vendor's part number.

**Manufacturer** - The manufacturer of the part as selected from a picklist of user definable companies.

**Manufacturer Part Number** - The manufacturer's part number.

**Replacement** - Optional replacement part selected from existing parts.

**Site** - The site where the part is located. This is selected from the pick list of sites setup under [Administration / Locations](#). The Site and Location are selected together.

**Location** - The location of the part. The location field is selected from user definable Locations. The Site and Location are selected together.

**Shelf & Bin** - The actual shelf and bin where the part is located.

**Units** - The units that the part is usually purchased or sold by as selected from a picklist of user definable units of measurement.

**Startup Quantity** - The initial quantity on when starting with ExpressMaintenance. In the [Parts Inventory Analysis](#) screen, the Quantity On Hand (Ending Quantity) is computed as Startup Quantity + Parts Received - Parts Used.

**Quantity On Hand** - The current quantity on hand of the part. You can have ExpressMaintenance warn you when the quantity on hand falls below a desired minimum by setting this feature in [Configuration](#).
**Minimum On Hand** - The minimum quantity to keep on hand of the part. You can have *ExpressMaintenance* warn you when the quantity on hand falls below a desired minimum by setting this feature in **Configuration**.

**Current Cost** - The current cost of the part.

**Billing Price** - The price that should be charged for the part when used.

**Image / Picture** - An image or picture of the part. Right click in the picture area for popup menu options for importing images, etc. For more details on importing images, see **Units - Images & Barcodes**.

**Notes** - Any notes on the part. You can double click in the notes field to open a larger window for inserting / editing notes.

**Duplicating Parts**

To duplicate a unit, click the Duplicate Unit button. You will be prompted for the information you wish to duplicate and the number of times to duplicate the unit.

**Defining User Fields**

*ExpressMaintenance* allows you to define up to 21 user fields for the Parts screen. Click on the Design Screen Layout button to define the fields and their tab. You can also define a pick list for each field under **Administration / Codes**. Since the changes are system wide, access to this option is limited to user accounts with full permission to **Administration / Defaults**.

**Printing**

To print a parts data sheet, simply click on the Print button at the top of the parts screen. To print a complete parts list, go to **Parts / Reports**.

**Performance / Speed**

By default, all records are retrieved in the query when the Unit screen is opened. This is really for demo purposes more than anything else. Once you have a substantial number of records in the system, we recommend that you turn off this feature and search for the set of parts or the part you wish to view / edit. You can turn the "Query All Parts On Open" option off under **Administration / Configuration / Parts Defaults**.

**Barcodes**

*ExpressMaintenance* allows for the printing and reading of barcodes for parts and units. Barcoding is simply a digital barcode projection of one or more key fields. You can use the built-in Report Builder to include barcodes in any report and on any field.
To edit or print the barcode on a part, click the Barcode button that appears at the top of the screen as shown below:

![Barcode button](image)

For more details, please see the Maintenance / Barcodes help topic.

**Sources**
The Sources tab allows you to select various vendor sources for the part and the current cost of the part from that vendor.

**Attachments**
The Attachments tab allows you to attach application files to the part and quickly open the files with the applicable application.

**Units**
Parts can be optionally associated with unlimited units. Using this tab, you can associate the part with one or more units. The same data is available from the Units screen reflecting parts associated with the Unit.

**Parts Help Topics**
- Parts - Inventory Analysis - Convenient screen for quick overview of parts inventory activity.
- Parts - Overview - The overview screen of parts.
- Parts - General - General data relating to parts.
- Parts - Receiving - The entry of parts purchased and received.
- Parts - Receiving - By Import - Receiving parts by importing from barcode csv file.
- Parts - Re-Ordering - General data relating to parts.
- Parts - Reports - Reporting on Parts inventory and purchases.
- Parts - Transferring - General data relating to parts.

### 6.4.3 Parts Inventory Analysis

**Access**
Parts Inventory / Inventory Analysis

**Explanation**
You can generate a Parts Data Sheet from the Parts screen. However, the Parts / Reports provides a more comprehensive list of Parts related reports as shown below:
6.4.4 Parts - Reports

**Access**
Parts Inventory / Reports

**Explanation**
You can generate a Parts Data Sheet from the Parts screen. However, the Parts / Reports provides a more comprehensive list of Parts related reports as shown below:
Printing Reports
Simply complete the report parameters in the left panel and then select the report in the right panel. For more details on generating reports and assigning favorites, see the Reporting section of Getting Started.

Parts Help Topics
Parts - Inventory Analysis - Convenient screen for quick overview of parts inventory activity.
Parts - Overview - The overview screen of parts.
Parts - General - General data relating to parts.
Parts - Receiving - The entry of parts purchased and received.
Parts - Receiving - By Import - Receiving parts by importing from barcode csv file.
Parts - Re-Ordering - General data relating to parts.
Parts - Reports - Reporting on Parts inventory and purchases.
Parts - Transferring - General data relating to parts.

6.4.5 Parts Transfers

Access
Parts / Transfers

Explanation
The Parts Transfer screen allows users to make quick transfers of inventory from one item to
another. This is especially helpful when transferring parts from one site to another or to move parts from one item to another when they are duplicated. The records entered in the transfer screen do effect parts inventory analysis and parts reordering.

![Parts Transfer Screen](image)

<table>
<thead>
<tr>
<th>Transfer Date</th>
<th>Transfer Code</th>
<th>Quantity</th>
<th>Part Name Out</th>
<th>Part Name To</th>
<th>Transfer Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/4/2016</td>
<td>Inventory Transfer</td>
<td>2</td>
<td>208 Series 1&quot; Pitch 35% Open Top Bell Por</td>
<td>208 Series 1&quot; Pitch 35% Open Top Bell Por</td>
<td>Bill needs the part in Memphis and none</td>
</tr>
</tbody>
</table>

**Parts Help Topics**
- Parts - Inventory Analysis - Convenient screen for quick overview of parts inventory activity.
- Parts - Overview - The overview screen of parts.
- Parts - General - General data relating to parts.
- Parts - Receiving - The entry of parts purchased and received.
- Parts - Receiving - By Import - Receiving parts by importing from barcode csv file.
- Parts - Re-Ordering - General data relating to parts.
- Parts - Reports - Reporting on Parts inventory and purchases.
- Parts - Transferring - General data relating to parts.

**6.4.6 Parts Receiving**

**Access**
Parts Inventory / Receiving

**Explanation**
As parts are purchased / received, they should be entered into ExpressMaintenance. This allows the application to properly track the most recent cost of the part and the quantity on hand. ExpressMaintenance is not intended to be a purchasing, invoicing or accounting application. However, the Parts Purchases screen does provide a convenient method of tracking purchases / receipts and updating parts inventory as shown below:
You can automatically populate a receiving record from a purchase order transaction. Simply click to insert a new receiving record, enter the PO number and click the “Populate From PO” button. The receiving record will be populated with the records from the purchase order and ready for further editing as needed. Clicking the same button at the top, you can close a PO or view the summary of receipts on the PO.

**Inserting / Editing**
To insert or edit a record, simply click the edit button on the data navigator at the top of the screen.
**Data Fields**

**Transaction Date** - The date of the vendor invoice / transaction.

**Vendor Name** - The name of the vendor as selected from a picklist of user definable vendors.

**Invoice Number** - The vendor's invoice of ticket number.

**PO Number** - Any reference to a purchase order number.

**Site Name** - Create your sites & locations and assign parts to that specific location or site.

**Tax Rate** - The vendor's sales tax rate.

**Freight** - The total charged for freight / shipping.

**Parts** - The total cost of all parts received on the invoice / ticket. This field is auto calculated from the data in the lower section of the screen.

**Tax** - The total computed sales tax. This field is auto calculated from the data in the lower section of the screen.

**Total** The total charge on the vendor's invoice. This field is auto calculated from the data in the lower and upper sections of the screen.
Part - The part number as selected by the Vendor's number from the existing list of parts.

Description - The displayed part name / description after the part number is selected.

Cost Center - The cost center or optional reference for the part purchased.

Quantity - The quantity received of the part.

Price Each - The price per unit of the part.

Subtotal - The subtotal cost of the part based on quantity x price.

Tax - The sales tax applied to the part based on the subtotal x the sales tax rate.

Total - The total cost of the part based on the subtotal + tax.

Printing
You can print a breakdown of the purchase data by simply clicking on the Print button at the top of the screen. For a complete list of parts related reports, go to the Parts / Reports screen.

Parts Help Topics
Parts - Inventory Analysis - Convenient screen for quick overview of parts inventory activity.
Parts - Overview - The overview screen of parts.
Parts - General - General data relating to parts.
Parts - Receiving - The entry of parts purchased and received.
Parts - Receiving - By Import - Receiving parts by importing from barcode csv file.
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Chapter VII

Purchasing
7 Purchasing

The Purchase Orders section of ExpressMaintenance is not intended to replace an official PO system in your accounting system. It is intended to serve as a method of quickly and easily generating Purchase Orders. Because ExpressMaintenance is not part of your accounting system, it cannot actually save expense accounts, job costs and other items normally associated with accounting transactions.

However, you will likely find the Purchase Order section to be quite handy if you are not already using a PO system as part of your company accounting software. The following is a screen shot of the Purchase Orders Menu:

![Purchase Orders Menu](image)

See Also
- Purchase Order Transactions
- Closing Purchase Orders
- Purchase Order Reports

7.1 Purchase Order Transactions

Access
Purchasing / Purchase Orders / Data View

Explanation
The Purchase Orders module provides a convenient method of tracking purchases. Purchase Orders may be entered easily and quickly while placing an order with the vendor or entered after the fact if they are issued in the field.

The Purchase Orders Transaction screen is intentionally designed to be more flexible and liberal in allowing data input. This design is to allow many users within a company to use the PO system without having to be highly knowledgeable of the company accounting system. Examples of this include the fact that the screen does not require a valid account on each line item.

Notes
The following is an overview of the steps associated with Purchase Orders (POs).

1. Purchase Order Transactions are entered and printed as items are ordered from
vendors.

2. As items are received, Purchase Orders are Cleared as Closed (received). Also handled from Parts / Receiving screen.

3. Purchase Order Reports are available for Open or Closed Purchase Orders.

Data Fields

PO Number - Official PO number automatically generated by ExpressMaintenance.

Date Ordered - The date in which the order or purchase is made.

PO Reference - Other reference you may desire to note concerning the PO.

Vendor Name - The Vendor from whom the purchase is made. Requires selection from authorized vendor list.

Vendor Ref - The Vendor's ticket or sales transaction number for reference purposes.

Deliver By - Optional date to indicate the expected delivery date.

Ship Via - Optional field to indicate the expected method of delivery.

Requested By - The name of the employee making the purchase.

Ship To - Optional ship to company / address for the PO. This field is selected from the
companies table which can contain your address's, vendors and customers.

**Site** - Optional site to indicate to which site the PO pertains.

**Unit** - Optional reference to a unit of equipment for the PO.

**Category** - Optional PO Category as setup under Administration / Codes.

**Voided** - Checkbox to indicate the PO has been voided.

**Closed** - Checkbox to indicate the PO has been Closed / Cleared. This can be done through Purchase Orders / Closing or Parts / Receiving.

**Notes** - Any notes or description to be

**Sales Tax** - Automatically computed sales tax computed based on Tax Rate and items checked for tax.

**Grand Total** - Automatically computed total for entire purchase order.

**Item** - A brief description or part number of the item being purchased.

**Quantity** - The quantity of the item being purchased.

**Units** - The units or packing quantity being purchased (ex. dozens, cases, each).

**Price** - The price per unit of the product being purchased.

**Tax** - When checked, indicates sales tax will be charged.

**Subtotal** - The extended price of quantity x price, total price for the line item (excluding tax).

**Searching Transactions**
To locate a transaction, click the . Select the search field, enter the search value and click Search.

**Inserting / Editing**
To insert or edit a record, simply click on the at the top of the screen.

**Receiving Transactions**
To record the receiving of purchases there is a special screen referred to as .
**Voiding Transactions**
To void a purchase order, simply find the purchase order and then click on the Void button at the top of the Transaction screen.

**Printing Transactions**
To print the selected transaction, simply click the print button.

**See Also**
Purchase Order Transactions
Closing Purchase Orders
Purchase Order Reports

### 7.2 Purchase Order Reports

**Access**
Purchasing / Purchase Orders / Reports

**Explanation**
The Purchase Orders module includes a window of reports associated with purchase orders. Reports include various sort options and parameters for Vendor, Status, Dates, etc.

**Printing**
To generate a report, enter the report parameters in the left panel and then click on the desired report. Remember all reports are displayed on the screen first and then can be optionally printed. Additional information is available under Getting Started on the topic...
of Reporting.

See Also
Purchase Order Transactions
Closing Purchase Orders
Purchase Order Reports

7.3 Close Purchase Orders

Access
Purchasing / Purchase Orders / Close Purchase Orders

Explanation
As purchases are received, the purchase order system needs to know that a purchase order is received (cleared) in order to exclude the items from reports reflecting outstanding purchases. This can be handled in either of two ways:

1. Close purchase orders through Purchase Orders / Closing screen (shown below)
2. Close purchase orders automatically through Parts Inventory / Receiving

To close purchase orders through method 1 listed above, simply check off purchase orders which have been received (closed). Please note that closing a purchase order from this screen does not automatically add the part to inventory. Only Parts Inventory / Receiving records add items to the Parts Inventory. For this reason, the preferred method of closing purchase orders is to enter a Parts Receiving record, reference the PO number and automatically populate the items from the PO and close the PO. For more details, see help topic on Parts Inventory / Receiving.

Notes
The Purchase Orders Clearing screen allows you to display Cleared or Open purchase orders. In addition, you can limit the view of purchase orders to a specific vendor. The list is always sorted by Vendor and Date. Simply click to check the items as Closed or click to uncheck items as shown below:
7.4 Parts Re-Ordering

**Access**
Purchasing / Purchase Orders / Parts Reordering

**Explanation**
The Parts Re-Ordering screen of ExpressMaintenance is a powerful utility for quickly reviewing parts inventory. It reflects the items that are due to be ordered and allows you to print reports or generate purchase orders. Simply select the site and click search to instantly view all parts that have fallen to or below the minimum quantity on hand. Adjust the “Quantity Within Re-Order” field to select parts almost due to reorder.

From this screen, you can print the report or generate purchase orders.
7.5 Parts Receiving

Access
Purchasing / Purchase Orders / Parts Receiving

Explanation
As parts are purchased / received, they should be entered into ExpressMaintenance. This allows the application to properly track the most recent cost of the part and the quantity on hand. ExpressMaintenance is not intended to be a purchasing, invoicing or accounting application. However, the Parts Purchases screen does provide a convenient method of
tracking purchases / receipts and updating parts inventory as shown below:

Auto Populating From PO
You can automatically populate a receiving record from a purchase order transaction. Simply click to insert a new receiving record, enter the PO number and click the “Populate From PO” button. The receiving record will be populated with the records from the purchase order and ready for further editing as needed. Clicking the same button at the top, you can close a PO or view the summary of receipts on the PO.

Inserting / Editing
To insert or edit a record, simply click the edit button on the data navigator at the top of the screen.
Data Fields

Transaction Date - The date of the vendor invoice / transaction.

Vendor Name - The name of the vendor as selected from a picklist of user definable vendors.

Invoice Number - The vendor's invoice of ticket number.

PO Number - Any reference to a purchase order number.

Tax Rate - The vendor's sales tax rate.

Freight - The total charged for freight / shipping.

Parts - The total cost of all parts received on the invoice / ticket. This field is auto calculated from the data in the lower section of the screen.

Tax - The total computed sales tax. This field is auto calculated from the data in the lower section of the screen.

Total - The total charge on the vendor's invoice. This field is auto calculated from the data in the lower and upper sections of the screen.

Part - The part number as selected by the Vendor's number from the existing list of parts.

Part Number -
**Part Name** - The displayed part name / description after the part number is selected.

**Cost Center** - The cost center or optional reference for the part purchased.

**Quantity** - The quantity received of the part.

**Price Each** - The price per unit of the part.

**Subtotal** - The subtotal cost of the part based on quantity x price.

**Tax** - The sales tax applied to the part based on the subtotal x the sales tax rate.

**Total** - The total cost of the part based on the subtotal + tax.

**Printing**
You can print a breakdown of the purchase data by simply clicking on the Print button at the top of the screen. For a complete list of parts related reports, go to the Parts / Reports screen.

**Parts Help Topics**
Parts - Inventory Analysis - Convenient screen for quick overview of parts inventory activity.
Parts - Overview - The overview screen of parts.
Parts - General - General data relating to parts.
Parts - Receiving - The entry of parts purchased and received.
Parts - Receiving - By Import - Receiving parts by importing from barcode csv file.
Parts - Re-Ordering - General data relating to parts.
Parts - Reports - Reporting on Parts inventory and purchases.
Parts - Transferring - General data relating to parts.

### 7.6 Receiving By Import

ExpressMaintenance includes the option to import parts receiving records from a comma delimited text file (csv). This allows users to utilize portable barcode scanners for recording incoming parts shipment and then easily import the data into the ExpressMaintenance Parts / Receiving data.

A csv file is most commonly created or edited with a spreadsheet application such as Excel but can also be created using external software such as that provided with portable barcode readers and portable computers.

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In order to import parts receiving records, you must have a csv file in a specific format. The file must include a space for each of the following fields of data and they must be in this exact order.

Vendor ID
Vendor Name
Invoice Number
Part Number
Part Description
Quantity
Price

The file can actually contain either Vendor ID or Vendor Name or both. The file can also contain Part Number or Part Description or both. In either case there must be a column for both even if one is blank.

The example below includes all fields:
123.01,Big Sky Supply,D342,Air Filter,12,15.99

The example below omits the Vendor Name and Part Name:
123.01,,D342,,12,15.99

Notice that even though the Vendor Name and Part Name is omitted, the comma is still in place to delineate the columns. This must be present in order for the import program to work properly and associate data with the proper columns.

Importing Receiving Records
In order to import receiving records, simply follow the wizard found in the Parts / Receiving.
After you select the desired CSV file, click the Next button to view records found and to be imported.
Review the records to be imported and edit as desired. When ready, click the Import button.
When importing is complete the wizard will display the status of records imported. To view the imported records, close the wizard and return to the Parts / Receiving screen.

Parts Help Topics

Parts - Inventory Analysis - Convenient screen for quick overview of parts inventory activity.
Parts - Overview - The overview screen of parts.
Parts - General - General data relating to parts.
Parts - Receiving - The entry of parts purchased and received.
Parts - Receiving - By Import - Receiving parts by importing from barcode csv file.
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Parts - Reports - Reporting on Parts inventory and purchases.
Parts - Transferring - General data relating to parts.
Utilities
8 Utilities

Utilities has everything you need from a schedule (calendar) to a Rolodex (address book).

Application Tools has many different tools to help the individual user or the company as a whole.

Application Settings can be setup by the user or by the administrator.

8.1 Application Tools

Schedule -
Rolodex -
Google Directions -
Document Editor -
Maintenance Forms -
Calculator -
Email Test -
SQL Statement -

8.1.1 Schedule

Access
Utilities / Application Tools / Schedule

Explanation
The Schedule screen lets the user view task and events in a calendar form. This calendar gives you many different viewing options as well as a personal calendar.
Insert/Editing
The ribbon in the schedule screen is different from the standard ExpressMaintenance data navigator

Personal Schedule -
New Event -
New Recurring Event -
Go Backward -
Go Forward -
Go to Today -
Go to Date -
Next 7 Days -
Day -
Work Week -
Week -
Month -
Timeline -
Year -
Group by Name -
Group by Date -
8.1.2 Rolodex

Access
Utilities / Application Tools / Rolodex

**Rolodex** - The Rolodex is a handy screen for tracking contacts other than maintenance vendors, etc. Actually, the data has nothing to do with the maintenance management system and is not used elsewhere. This is just a courtesy screen for common users who wish to enter outside contacts. The screen shot below reflects the rolodex fields which are self explanatory.

![Rolodex Screen Shot]

The Rolodex also has a data contains a data view. Double click the record or select the record and click data view. Each record contains name, address, contact, phone numbers, email, & website.
In the Rolodex the record can by categorized by record type
Each record also has a contact notes section located at the bottom of the data view screen.

8.1.3 Google Directions

Access
Utilities / Application Tools / Google Directions

Google Direction is just a quick link to search directions. ExpressMaintenance uses Google maps. Google direction gives you several options such as print, print with map, and copy.

Note: The user can use the data view to copy an address from ExpressMaintenance to Google Directions
8.1.4 Document Editor

*Access*
Utilities / Application Tools / Document Editor

**Editor** - This option opens the ExpressMaintenance built-in editor. This is the same editor used for editing all note fields within ExpressMaintenance. The editor is convenient for entering text and creating document.

**Note:** You can also paste text from other word processing programs. the products
8.1.5 Maintenance Forms

Access
Utilities / Application Tools / Maintenance Forms

Explanation
ExpressMaintenance allows you to define links to various maintenance forms and documents which might be used by your personnel. Typically such forms are stored in a folder that is commonly accessed by the users. The Forms Setup screen allows you to give the records a Type, Name and Reference. Users can then access the Forms screen from the Utilities section and instantly pull up the document with the applicable application. Files can be of any type for which users have a corresponding application (example: pdf, excel, word, etc).

Notes
Only users with access to the Defaults section of the program can add forms to the setup. However, all users can access the screen and print the forms.
**Inserting / Editing**

To insert or edit a record, simply click on the data navigator at the top of the screen or right click and use the pop-up menu.

**Data Fields**

**Type** - The type of form such as Excel, Adobe, etc. Types are user definable and can be anything that is applicable to your company. Types are setup under Administration / Setup / Codes.

**Name** - The name of the form or document.

**Reference** - The actual file name with full folder path

### 8.1.6 Calculator

**Access**
Utilities / Application Tools / Calculator

**Calculator** - This utility simply pops up the Windows calculator.
8.1.7 Email Test

Access
Administration / Manage / Email Test

Explanation
ExpressMaintenance uses a component to send standard SMTP email. You can setup ExpressMaintenance to send email when work orders or issues, purchase orders and when requests are created in ExpressRequest.

This utility is designed to be a simple way for administrators to test and resolve any email issues with ExpressMaintenance. When the email does not work in ExpressMaintenance, the problem is always one of two things:

1. The default settings are not correct as setup under Administration / Setup / Defaults / Email
2. Firewall / Security software is preventing ExpressMaintenance from sending email

Use this utility to test and make sure you have the sender settings correct. If you are still unable to send email, the problem is with firewall / security on the network and you must resolve with your IT administrator.

Note
The color of the check indicates the level of authorization. It is important for each user who needs access to ExpressMaintenance to have their own login name and password. This information should be maintained by the system administrator only and access to the users window should be limited to the system administrator.

Server Requires SPA - Controls whether the AUTH LOGIN command is to be issued by the mail component. If an SMTP server requires the user authorization before sending any e-mails, set this property to the value True. After receiving the EHLO response from the SMTP server, the component will issue an AUTH LOGIN command. It then sends the Base64-encoded user ID and password. If a failure occurs, the EnableAuth property will be set to the value False, indicating the connection has not been authenticated. You can compare this setting to your email settings in Outlook for more information.

Prompt Explanations
SMTP Server - Remote URL of the SMTP Server (example: mail.myserver.net).
**Server Port** - The port to be used when sending emails.

**Bound IP** - The senders IP to be used (not usually required).

**Sender Account** - Specifies the user ID to use when establishing an authenticated connection with an SMTP server. When setting the EnableAuth property to the value True, set the value of this property to the user's ID. UserID is the name of the account to which the SMTP server grants access upon successful logon. This is usually the name part of the user's e-mail address, but could also be a specific account name. The UserID property is used with the Password property to log on to the server. (example: jdoe)

**Sender Password** - Specifies the password to use when establishing an authenticated connection with an SMTP server. When setting the EnableAuth property to the value True, set the value of this property to the user's password. Password is the password associated with the UserID for a given SMTP account. (example: mypassword)

**Mail From** - The email address of the person sending the email. (example: jdoe@myserver.com)

**Mail To** - The email address of the intended recipient. (example:bjones@bigcompany.com)

**Mail CC** - The email address of a carbon copy recipient.

**Subject** - The subject of the message being sent.

**Attachment** - Select a file to attach to the email.

**Message** - The message content.

**SMTP Component Technical Information**
The TIpSmtpClient component handles sending e-mail from your system to an e-mail server. The component uses the TIpMailMessage class to contain the message to send, manages connecting to your e-mail server, logging on, and the transfer of the actual message. The commands sent are specified in the appropriate RFCs, so consult those if you need to expand on the existing methods. The TIpSmtpClient component can be used in two distinct ways. It can send individual SMTP commands such as HELO to log on or DATA to send a message. It can also perform SMTP tasks to send multiple commands. For example, the SendMail method starts the stSendMail task which connects, logs on, and sends the message. SMTP servers almost universally accept the basic SMTP commands, but some extensions have been added.
8.1.8 SQL Statements

**SQL Statement** - This option allows administrators to save and run SQL statements as needed. This is helpful if you have other software that interfaces with ExpressMaintenance or you wish to update certain fields periodically via direct SQL statements.

*Note:* Caution should be used when running SQL syntax statements as the wrong statement can delete or alter data in an undesired manner. Using this option requires a good understanding of SQL syntax.

![SQL Statement Interface](run-sql-statement.png)

8.2 Application Settings

Enter topic text here.

8.2.1 Set Lookup Lists

Setup Lookup Lists - Several places in ExpressMaintenance you will find a drop down picklist for Units and Parts. Different users have different preferences as to what fields should appear in these picklist and in what order. ExpressMaintenance allows you to define lookup List properties under Utilities / Setup Lookup Lists. Select the desired lookup list and the properties window will appear as shown below. Simply arrange, turn on / off and name fields as desired. These settings are per user and are saved in the Windows \
ExpressMaintenance.ini file.

**Note**: This same interface is used to edit Grid Properties to define how fields will be displayed in grids
8.2.2 Refresh Lookup Lists

**Refresh Lookup Lists** - This option simply re-queries the database for the lookup tables that are open and available. This is helpful if another user has entered new data to which you need to select or see refreshed lookup lists.

![Refresh Lookup Lists](image)

8.2.3 Change Password

**Change Password** - This tabs allows the user to quickly change their password.

**Note:** Be sure to check your password requirements before selecting a new password.

![Change Password Form](image)

8.2.4 App Preferences

Application Preferences - Select from many different types of themes, defaults, and setting to give the user a more personal layout.
8.2.5 Ribbon Setting

The application setting ribbon has the option to quickly change the theme by selecting an icon from application settings.

Use the arrow to scroll down to view other theme options.
9 Help

Enter topic text here.

9.1 Application Help

Enter topic text here.

9.1.1 Application Help

Enter topic text here.

9.1.2 Software Support

Enter topic text here.

9.1.3 Release Notes

Enter topic text here.

9.1.4 Express Tech Website

Enter topic text here.
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