

1 ExpressRequest

1.1 Contents



The instant way to submit maintenance requests.

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Several of the characteristics of ExpressRequest are determined by your system administrator. These settings are made in the ExpressMaintenance software and covered in the ExpressMaintenance help.

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1.2 Introduction

ExpressRequest is the instant way to submit maintenance requests to your maintenance department. Requests are entered in a easy to use screen. Requests instantly appear in the ExpressMaintenance maintenance management system.

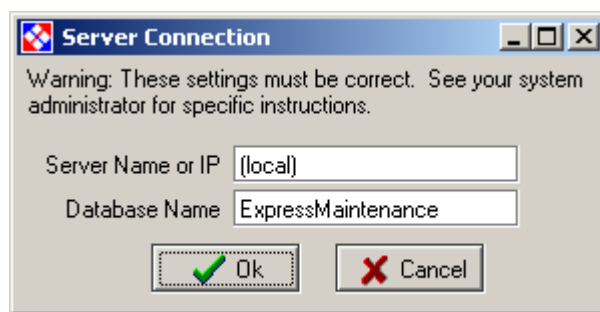
ExpressRequest provides you the ability to:

- ◆ Instantly submit your maintenance requests.
- ◆ Communicate with the maintenance department with follow-up notes.
- ◆ Track the status of your maintenance requests.
- ◆ Know exactly when maintenance requests are assigned to work orders.
- ◆ Append and edit your maintenance requests.
- ◆ Maintain a history and print your maintenance request.

1.3 Getting Connected

ExpressRequest is a powerful network based application. In order to submit maintenance requests, you must first connect to the SQL Server. The SQL Server is a database engine where maintenance management data is stored.

The first time you run ExpressRequest, the program may pause and fail to connect to the SQL Server. The Server Connection screen will appear as shown below:



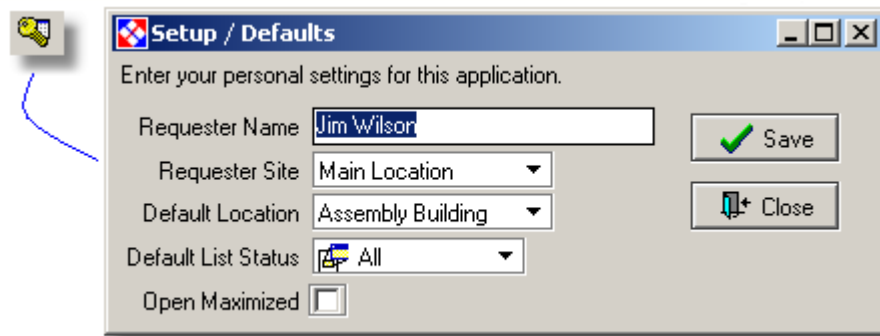
Obtain the Server and Database names from your system administrator. Enter each in the Connection Screen fields as shown above. Click the Ok button to proceed.

ExpressRequest will test the connection. If the connection is successful, the program will open and proceed to the [Setup Screen](#).

Note: Your system administrator may have provided a special .ini file which already contains the server connection information. You may not see this

1.4 Setting Up

The first time you use ExpressRequest, enter your personal settings in the Setup / Defaults Screen. The Setup screen will likely appear automatically. If not, simply click the Setup button to access the screen as shown below.



Field Explanations

- **Requester Name** - Enter your name which will be associated with all requests.
- **Requester Site** - Select the site where you are located.
- **Default Location** - Select the default location within the site. You can change the location when inserting a request.
- **Default List Status** - Select the default status to list when ExpressRequest first opens.
- **Open Maximized** - Check this option to have the ExpressRequest window open in a maximized state.

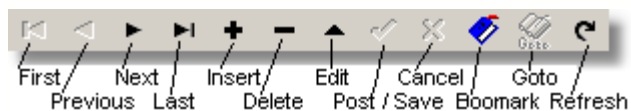
Note: See your system administrator if you have questions about the default Site and Location. You can only enter requests for one site. However, you can select the location when entering new requests. You can change the defaults anytime.

1.5 Toolbars

You can easily navigate and manage your request records using the toolbars at the top of the ExpressRequest screen. Toolbars are small panels with buttons that perform various functions. Below is an explanation of each toolbar and the buttons.

Data Toolbar

The Data Toolbar is for navigating and editing the request records. Each button performs a different function as noted in the pop-up hints.



Print Toolbar

1.6 Inserting Requests

You can insert a new maintenance request in either of two ways:

- Right click on the grid for the popup menu, select Insert Request.
- Click the Insert button in the [Data Toolbar](#).

ExpressRequest will switch to a single record screen that allows you to enter a new maintenance request. The screen is shown below with an explanation of each field. Once you have completed entering the fields, you must save the record by clicking the Post button on the [Data Toolbar](#).

Field Explanations

- **Unit / Equipment** - The name or description of the unit (equipment) that to be tracked. Be as specific as possible. Depending on your system setup, you may be required to select a valid piece of equipment.
- **Location** - The location of the equipment as selected from the list of valid locations for your site.
- **Request Priority** - The priority level of the maintenance request.
- **Date Desired** - The desired date for the service to be performed.
- **Request Status** - The [status of the request](#). You will usually want to begin the request with a status of Drafts or Submitted.
- **Date Requested** - The date you entered the maintenance request.
- **Request Number** - System assigned request number.
- **Service** - Enter a brief and specific description of the service you are requesting. Depending on your system setup, you may be required to select a valid pre-defined service.
- **Service Notes** - Enter descriptive notes and more details about the service being requested.

Note: Save inserted record by clicking the Post button on the [Data Toolbar](#).

1.7 Managing Requests

Your maintenance requests can be instantly viewed in the main screen. Requests are grouped by status codes. The statuses are listed in the left panel. When you

Sorting Requests

To change the sort order of the your requests, simply click on the title button at the top of the grid column. Clicking the title button again toggles between Ascending and Descending order.



For example, click on the title button of the Requested column and your requests will be sorted by the Date Requested in Ascending order. Click the button again and your requests will be sorted by Date Requested in Descending order. A small indicator arrow will appear in the title button to indicate the sort direction.

Selecting A Request

- You may want to select a request for the purpose of editing, adding follow-up notes or printing the request. To select a request, click on the request in the grid. A blue arrow in the left margin of the grid indicates the selected record.

Editing A Request

There are three quick and easy ways to edit the selected request:

- Double click on the desired request
- Right click on the desired request to show the pop-up menu
- Click the Edit button in the data toolbar

Changing Grid Properties (Layout)

You can change the column properties of the requests grid. Click the Grid Properties button in the upper left corner of the grid and the grid properties window will appear. You can define the order, width and title of each column.

1.8 Printing Reports

You can print a request list or a single request sheet by clicking the buttons shown below. Your report will first appear on the screen with the option to print.



Prints a list of your requests for the currently selected status. To print all requests, select "All" in the status panel first.



Prints a detail sheet on the currently selected request.

1.9 Common Questions

? How do I insert a new request?

You can insert a new request either of two ways:

- Right click on the grid for the popup menu, select Insert Request.
- Click the Insert button in the [Data Toolbar](#).

1.10 How To Order



After evaluating ExpressMaintenance & ExpressRequest, you will want to own these exciting maintenance management tools.

Ordering is easy...

Simply go to our website and print the order form:

<http://www.expresstechnology.com/ExpressMaintenance/OrderForm.htm>

Phone:

251-974-2181

Fax

251-974-2184

Mail

Express Technology Inc.
P.O. Box 994
Orange Beach, AL 36561

1.11 Report Builder

ExpressRequest 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.

For more information on Report Buidler, please see the seperate Report Builder help file or the Report Builder User's Guide.

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