User's Guide

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ExpressRequest Help

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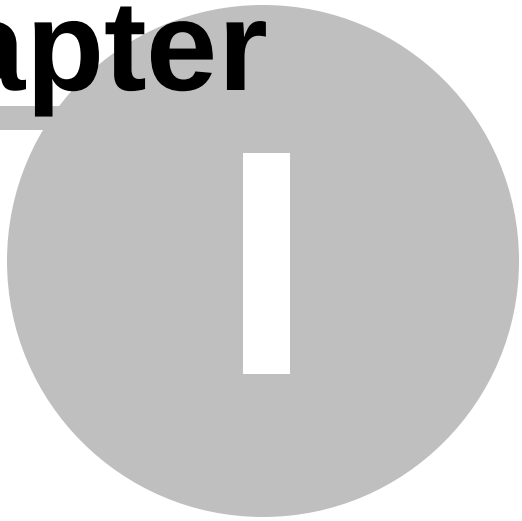
ExpressRequest

Chapter



1 ExpressRequest

1.1 Contents

The instant way to submit maintenance requests.

Select from the topic pages below:

- Introduction
- Getting Connected
- Setting Up
- Toolbars
- Inserting Requests
- Managing Requests
- Printing Reports
- Common Questions
- How To Order

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:

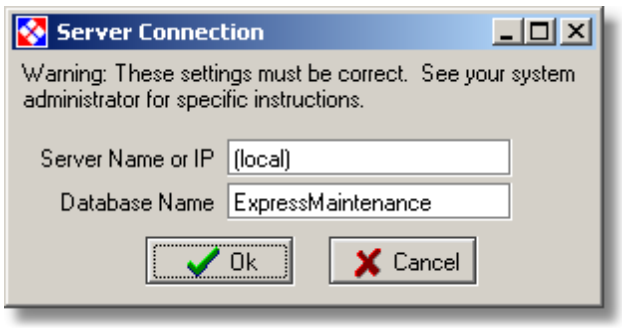
- Instantly submit your maintenance requests.
- Communicate with the maintenance department with follow-up notes.
- Track the status of your maintenance requests.
- Know exactly when maintenance requests are assigned to work orders.
- Append and edit your maintenance requests.
- Maintain a history and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



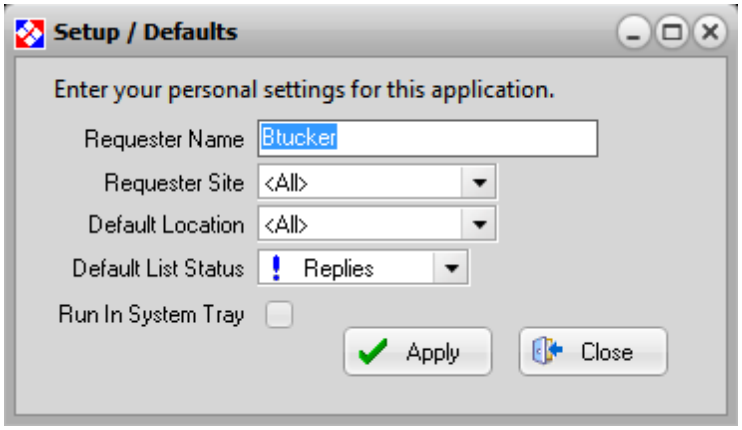
Obtain the Server and Database names from your system administrator. Enter each in the Connection Screen fields as shown above. Click the Ok button to proceed.

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 screen.

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.
- **Run In System Tray** - Check this option to have ExpressRequest run in your

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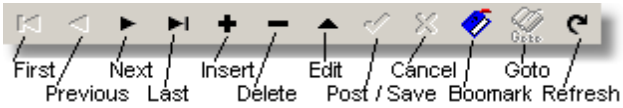
window system tray.

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
The Print Toolbar contains two buttons for printing the request reports..

General Toolbar
The General Toolbar contains buttons for accessing the setup screen, help, and exiting the program.

Note: As the cursor is placed over a button, pop-up hints appear explaining the function of the button.

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.

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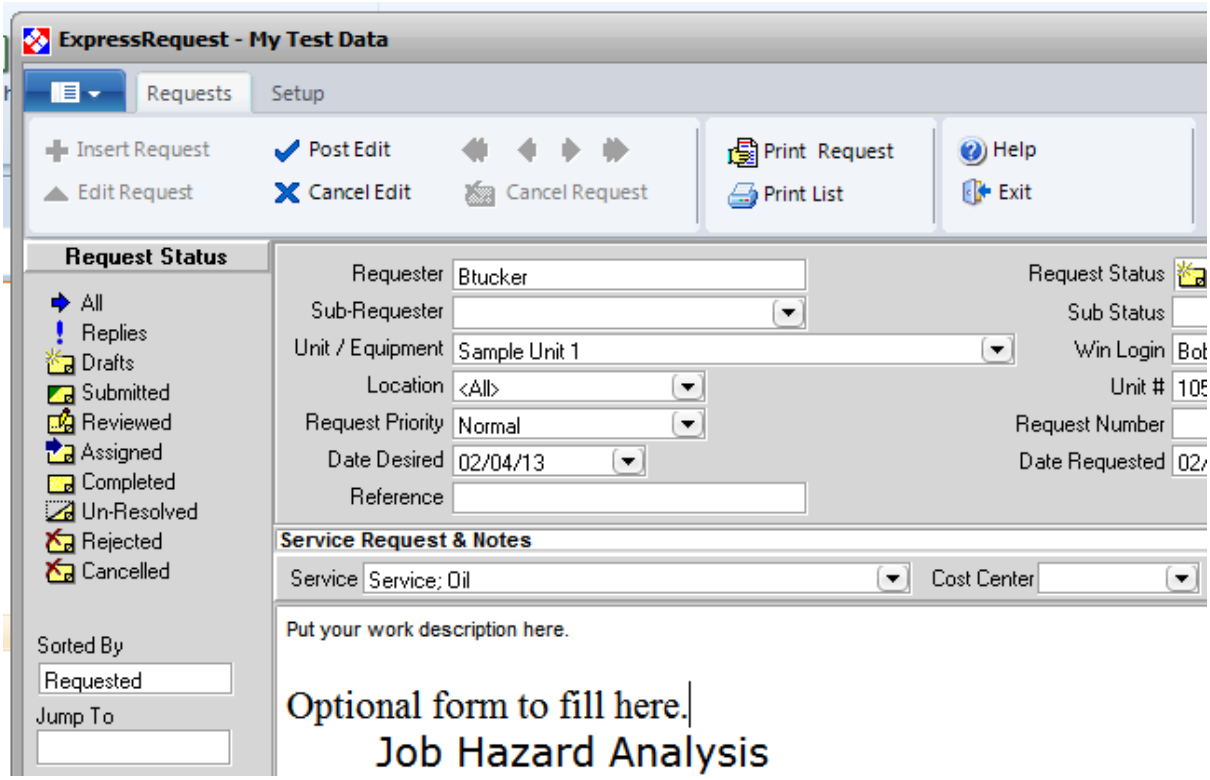

Field Explanations

- **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 click on a status, your requests are instantly displayed in the grid on the right panel.

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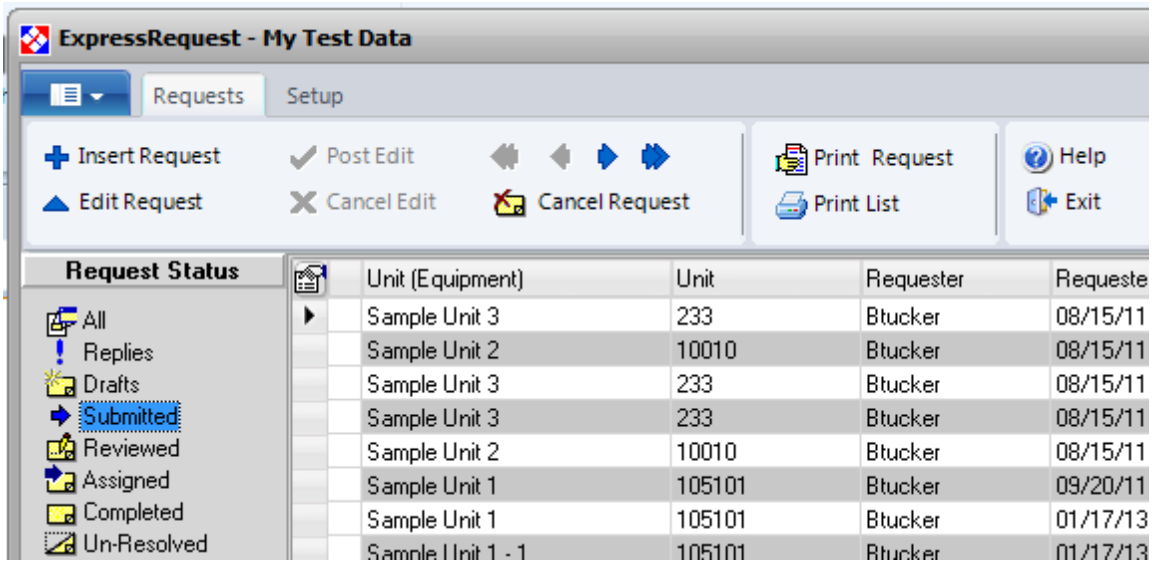

While viewing your requests, you can also:

- View different request by status
- Browse the request within a status
- Sort the request in the desired order
- Select a request for editing
- Edit a request
- Insert a new request
- Print a request report
- Change the grid properties (layout)

Viewing Requests

You can view your requests for each status by clicking on the desired status in the left panel. To view all requests, click on "All" in the top of the left panel.

- All - All requests regardless of status.
- Drafts - Requests you have entered but not submitted.
- Submitted - Request entered and submitted to maintenance for attention.
- Reviewed - Reviewed by maintenance but not assigned to a work order.
- Assigned - Requests that have been assigned to a work order.
- Completed - Requests that have been completed via a work order.
- Un-Resolved - Requests that cannot be immediately resolved via work order.
- Rejected - Indicates the maintenance department has rejected the request.
- Cancelled - Requests that have been canceled by you or maintenance.

Browsing Requests

When multiple requests are displayed for a specific status, you can browse through the requests by using the vertical scroll bar on the right of the grid. You can also use the Next and Previous buttons of the data toolbar at the top of the screen.

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.

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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.

Be sure to click the Post button of the Data Toolbar to save the request.

? What do the request status codes mean?

- All - All requests regardless of status.
- Drafts - Requests you have entered but not submitted.
- Submitted - Request entered and submitted to maintenance for attention.
- Reviewed - Reviewed by maintenance, but not assigned to a work order.
- Assigned - Request has been assigned to a work order.
- Completed - Request has been completed via a work order.
- Un-Resolved - Requests that cannot be immediately resolved via work order.
- Cancelled - Requests that have been cancelled by you or maintenance.

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? Can I change the status of a request?
You can change the status of a request by editing the request and selecting the Status field, or by right clicking and using the pop-up menu. You cannot change the status to Assigned or Completed. This is handled automatically in maintenance by the ExpressMaintenance software.

? How do I sort requests when viewing them in the grid?
You can sort on any column by clicking on the title button at the top of the column. Clicking the same title button toggles between Ascending and Descending.

? What is the Jump To field?
You can type characters in the jump to field and ExpressRequest will automatically position to the nearest matching record. The positioning is based on the current sort column.

? Can I change the layout of the requests grid?
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.

? What do I do if I am getting a connection error?
You need to contact your system administrator and obtain the proper Server and Database names. This information must be entered correctly before the program will run. Once ExpressRequest connects, it will remember this information and you will not be prompted for it again. Please do not contact Express Technology for this information; we have no way of knowing the name of your SQL Server.

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

Phone:
251-929-3200

Fax
251-929-3211

Mail

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Express Technology Inc.
8100 Falcon Blvd
Fairhope, AL 36532

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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