

Update Guidelines (ver. 9.X)

Welcome to ExpressMaintenance version 9.1. This new version incorporates many powerful new features and enhancements to ExpressMaintenance and ExpressRequest. The update will bring your software and database to the current version regardless of the version you are currently running. There is no need to install previous updates.

Installing the Update

Please take the following steps for updating your copy of ExpressMaintenance to version 9.1.

1. **Make a Backup** – Just as a precaution, you should backup your ExpressMaintenance database before installing and running the update. You can use whatever backup software you normally use or the backup option in ExpressMaintenance found under Administration / Backup.
2. **Note the Location** – Note the location of your existing copy of ExpressMaintenance. It is important that you install the update in the exact same location where ExpressMaintenance currently resides. Unless you are running only on a single computer, this is most likely to be a server computer rather than a workstation. Check the properties of your shortcuts to make sure you are familiar with the computer and folder path where the program resides. You will need this information during the installation.
3. **Download** – Download the ExpressMaintenance update install program file (EMUpdate.exe) from our website at <http://expresstechnology.com/download-software-updates/>. If you have a license and use ExpressRequest, you will need to install the ExpressRequest update file as well (ERUpdate.exe).
4. **Save** - Save the update install program (EMUpdate.exe) in a folder on the computer where the program currently resides.
5. **Admin Rights** – Make sure you login to the installation computer with full Admin rights before you run the update install program as you will need permission to overwrite and create new files.
6. **Close the Program** – Make sure all users are out of ExpressMaintenance before installing the update as the update program will need to be able to overwrite the existing program file (Maintenance.exe).
7. **Install** – Run the update install program (EMUpdate.exe). The installation program will step you through the process. When prompted for the installation folder, make sure you select to install in the folder where ExpressMaintenance currently resides as noted in step 2 above. The update installation program will overwrite the ExpressMaintenance program file (Maintenance.exe) and create additional files in the folder.

This completes the process of installing the ExpressMaintenance update to version 9.1. You will now need to run ExpressMaintenance and make a few changes in your data before allowing users to access the software.

Implementing the Software

Version 9.1 of ExpressMaintenance completely changes the way users, employees and requesters are setup in the application. In previous versions, there were three different setup areas for login users, employees (work order technicians) and requesters for ExpressRequest. In version 9, all of these are consolidated into one setup screen – Admin / Employees. In addition, version 9.1 implements a more sophisticated method of password requirements and encryption. For this reason, there are some manual changes you will need to make to your data.

The update routine attempts to gather all login users, employees and requesters and create a record for each in the new Employee table / screen. However, this process is not complete and requires some minor changes on your part.

Please follow these steps before allowing other users to run the new version of the software.

1. **Run** – Once the installation is complete, run ExpressMaintenance. If you are prompted for a login, use the login of 'sa' with a password of 'Welcome'. The program will begin by updating the database to include several new tables and fields. Once the changes are made, click the 'Continue' button to proceed.
2. **Size** – Adjust the program window to the size (or maximized) that you desire. Each time you close the program, your size and position will be used as the default.
3. **Employees** – From the main ribbon menu at the top of the screen, click on Administration / Employees to access the Employee data screen. You will see all employee records listed in the grid under the Overview tab. These records will be a combination of the login users, employees and requesters found during the update. They are now all in one table / screen as Employees. Employees can be any combination of the following 4 roles in ExpressMaintenance. Each role requires certain things be setup in the Employee screen.
 - a. **Application User** – An employee who is a user of ExpressMaintenance thus requiring a login and password to access the software.
 - b. **Maintenance Notification** – An employee who is a user of ExpressMaintenance and is to be notified of services or requests due when they login to ExpressMaintenance.
 - c. **Maintenance Technician** – An employee who may or may not use ExpressMaintenance but will have work orders assigned to them.
 - d. **Requester** – An Employee who may or may not use ExpressMaintenance but uses ExpressRequest to login and create maintenance requests.

Again, an employee can be any combination of these three.

4. **Editing Employee Records** – In the Admin / Employee screen, click on the Data tab to view the complete data record of the first employee listed. For each employee record, you will need to take the following steps. See the image on page 3 for reference.
 - a. Decide if the employee is still valid. If not, delete the employee record.
 - b. Complete the optional employee general information (example: address, phone, etc.) as desired.
 - c. If the employee is an **Application User**, click on the Access Settings tab in the lower section of the screen. Enter a login name for the user account if one is not there. Do not change the password as it is set to 'Welcome' and the user will be prompted to enter a new password the first time they login. Click the 'Create Access Records' button under the Access Settings tab. This will create a separate record for each area of the program giving the employee full access to every option. You will then need to edit the access settings based on the applicable permissions for the selected employee.
 - d. If the employee gets **Maintenance Notification** which is flashing at the bottom of the screen when Services (PMs) are due or incoming Request, you will also need to check the 'Services Due Notification' and / or the 'Requests Due Notification' checkboxes under the Access Settings tab.
 - e. If the employee is a **Maintenance Technician** and may have work orders assigned to them, check the 'Maintenance Technician' checkbox in the lower part of the Access Settings tab. If the employee is not going to be a login user of ExpressMaintenance, you do not need to setup any other access settings.
 - f. If the employee is a **Requester** and will be submitting requests through ExpressRequest, click on the 'Requester Settings' tab. Check the 'Allowed Requester' checkbox and enter the requester name if it is blank. If you know the requesters assigned computer, you can enter it as well but it is not required.
 - g. Be sure to save your changes. As you enter each employee's data, be sure to post the changes at the top of the screen before advancing to the next employee.
5. **System Configuration** – In previous versions, the system configuration was referenced as 'Defaults'. In version 9.1, this is available under Administration / Configuration. The configuration screen includes several new options and settings in addition to improved organization. Click on Administration / Configuration to access the Configuration screen. You can check out all of the categories within the Configuration screen at any time. However, we do recommend you review the setting under the following categories.

- a. **Security Settings** – Set the minimum password length and other login requirements as desired. Turn ‘Log User Activity’ on or off as desired. Logging user activity is very helpful for investigating altered and deleted data but it does cause a slight decrease in performance when records are posted.
- b. **Performance Settings** – The single biggest item that affects the performance of ExpressMaintenance is the size of images inserted in the notes and picture fields of the database tables. There is no benefit to inserting large high-quality images in these fields. Such images should be small and low resolution. You can prevent users from inserting large images by limiting the size of the notes and pictures. We recommend a maximum setting of 2,000,000 bytes (2 MB). You may wish to adjust other setting but the primary concern is notes and picture size limits. For information on locating excessive notes in your database, see ‘Data Settings’ below. We also recommend Cursor Location be set to ‘Client’ and Cursor Type be set to ‘Dynamic’ or ‘Automatic’. Keep in mind you can change these settings anytime.
- c. **Scheduling** – The Service Overview and Work Order Overview screens now include an option to view PMs and work orders in a calendar / schedule type format. Under the Scheduling category you can define certain settings such as ‘Work Week Begins’, ‘Work Day Begins’ and ‘Work Day Ends’.
- d. **Equipment & Parts** – You may want to take a moment to turn off certain tabs of the Equipment and Parts screen that you do not use in your operation. Do this by selecting the ‘Define Units Screen Layout’ and ‘Define Parts Screen Layout’ buttons under each category.
- e. **Data Settings** – Under the Data Settings category, the last item is ‘Run Notes Utility’. You can use this utility to locate any notes fields that exceed the selected maximum size (2 MB recommended). You can run this utility anytime as it is not required as part of the update process. When you run the Notes Utility, connect to the database and then click the ‘Check For Excessive Notes’ button. The results will be displayed in a grid. Once you have a list of excessive notes, you can choose the option to clear them or you can locate them in the applicable screens by the record number and edit the notes manually.

The screenshot shows the 'Employees' data screen. The 'Access Settings' tab is active, displaying the following table:

Item	Setting
Category : Administration	
Category : Equipment	
Category : Mobile App	
Category : Parts Inventory	
Category : Purchase Orders	
Category : Utilities	
Category : Work Orders	

The 'Access Legend' shows the following settings:

- ✓ No Access
- ✓ Read Only
- ✓ Write & Read
- ✓ Full Access

The 'Maintenance Technician' checkbox is checked.

Administration / Employees Data Screen

Final Suggestions

- 1. Release Notes** – Once the new version is installed and configuration changes have been made, you should go to Help / Release Notes to view an explanation and summary of the changes in version 9.1 of ExpressMaintenance.
- 2. User Workstations** – Provided you installed the software in the same location where it previously resided, there is nothing to change on the user workstations. You simply need to let each user know to use their login name is the same and their new temporary password is 'Welcome'. The program will prompt them to change their password the first time they login to the new version 9.1.
- 3. Grid / Searching Features** – The data screens in version 9 offer many new features to make organizing, viewing, searching and editing data even easier than previous versions. There are many new options and tools for organizing and searching data. We recommend you print and provide your users with a copy of the [Searching Explanation Document](#) for a thorough explanation of these features.
- 4. Application Help** – ExpressMaintenance version 9 includes a new help file system and user's guide which can be found on our website at the [Application Help](#) option.

It is our desire to make the transition to version 9.1 as smooth as possible. We hope you enjoy the many enhancements and interface improvements we have worked so hard to provide in this release. If you encounter any issues please email us with details at support@ExpressTechnology.com. We will work to promptly correct them and provide incremental updates.

As always, thank you for using ExpressMaintenance and ExpressRequest.

We appreciate your continued support.