Engineering Response Desk Portal

REVIEWER/ ASSIGNER/ ADMIN/ REPORTS

USER GUIDE

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MDOT
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MARYLAND PORT ADMINISTRATION

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Engineering Response Desk Portal

The Engineering Response Desk Portal was designed to provide a convenient, centralized system that allows users to file service requests and reviewers to monitor, address, and respond to those requests.

Access

To access the Engineering Response Desk Portal, open an internet browser on your device and enter the following URL:

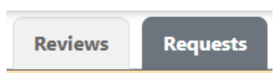
http://mpawtceng1:84/ERDPortal

Reviewer Role

The following sections will detail the layout, tools, and functions of the application for **Reviewers**.

ERDP Application Tabs

At the top of the page are tabs the Reviewer can access to utilize different functions within the application. The main tabs for Reviewers are **Reviews** and **Requests.** If a Reviewer has credentials to access other roles and functionalities, such as **Task Assigner**, **Admin**, and **Report Viewer**, they will be located at the top of the page, otherwise these will be hidden from view.



When a Reviewer logs-in and accesses the Engineering Response Desk Portal, they will be presented with the **Reviews** tab displaying their **Requests for Review**. This is a list of all requests that they are assigned to. The Reviews tab is composed of the **Search Panel**, and the list of **Requests for Review** below.

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ER No.	Request Date	Requester	Task Description	Dept.	Location	Category	Engineering Task Manager	Status	Completion Date
18-0074	10/3/18	Grace Ai	test			MU	Grace Ai, John Shiu, Matthew Berry	Assigned	
18-0073	10/3/18	Viji Requestor				MU	Grace Ai, John Shiu, Matthew Berry	Assigned	
18-0072	10/3/18	Grace Ai	test new			MU	Grace Ai, John Shiu, Matthew Berry	Assigned	
18-0071	10/3/18	Grace Ai				MU	Grace Ai, John Shiu, Matthew Berry	Assigned	
18-0070	10/3/18	Viji Requestor				MU	Grace Ai, John Shiu, Matthew Berry	Assigned	
18-0069	10/3/18	Viji Requestor				MU	Grace Ai, John Shiu, Matthew Berry	Assigned	
18-0068	10/3/18	Viji Requestor				MU	Grace Ai, John Shiu, Matthew Berry	Assigned	
18-0067	10/3/18	Viji Requestor				MU	Grace Ai, John Shiu, Matthew Berry	Assigned	
18-0066	10/3/18	Viji Requestor				MU	Grace Ai, John Shiu, Matthew Berry	Assigned	
18-0065	10/3/18	Viji Requestor				MU	Grace Ai, John Shiu, Matthew Berry	Assigned	
18-0064	10/3/18	Viji Requestor				MU	Grace Ai, John Shiu, Matthew Berry	Assigned	
18-0063	10/3/18	Viji Requestor				MU	Grace Ai, John Shiu, Matthew Berry	Assigned	

‘Reviews’ Tab:

The Reviews tab displays all requests that the Reviewer is responsible to oversee. From this page, users can check the status of a request, edit a request’s information, or create a new request.

There are three classifications for requests:

- General requests submitted without any indicators
- Flagged requests indicate a request that is **High Priority**
- Highlighted requests indicate requests that are **Overdue**

The **Request for Reviews** list consists of these fields:

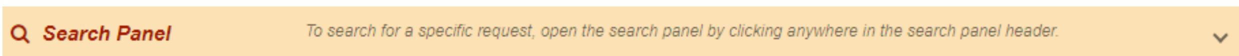
ER No.	Request Date	Requester	Task Description	Dept.	Location	Category	Engineering Task Manager	Status	Completion Date

- **ER No. –** Displays the ER No. for that specific request. This is auto-generated when a new request is created and is hyperlinked for access to this request’s details page.
- **Request Date –** Displays the date the request was created.
- **Requester –** Displays the name of the requester.
- **Task Description –** Displays a description of the request.
- **Department –** Displays the department associated with the request.
- **Location –** Displays the spatial location associated with the request.
- **Category –** Displays the category of the request.
- **Engineering Task Manager –** Displays the Task Manager(s) assigned to that request.
- **Status –** Displays the status of the request.
- **Completion Date** – Displays the date the request was completed.

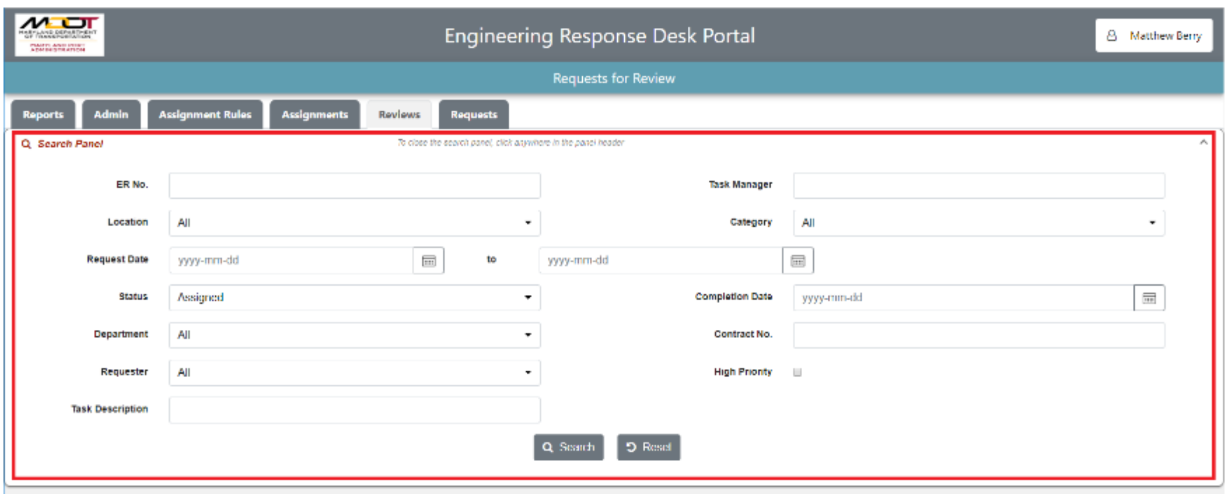
Searching for Requests

Below the tabs at the top of the ERDP, is the Search Panel. In this panel, Reviewers can search for Requests, either assigned to them or submitted by them (depending on the active tab) by entering keywords into the Search Panel.

- Select either the **Reviews** tab or **Requests** tab to begin searching for requests.
  - **Reviews tab** – shows a list of all submitted requests the reviewer is assigned to.
  - **Requests tab** – shows a list of all requests the reviewer has submitted.
- To access the Search Panel to filter request results, click **anywhere** on the Search Panel.



- The search panel will expand offering different filter fields to narrow the search results.



- Using the text boxes and drop-down menus, fill in as much information about the desired request as possible.
- When the Panel is filled out, click the Search button at the bottom of the panel.
- The search results will appear below the Search Panel in the list.
- Click on the desired request's hyperlinked ER No. to see more information about the request.

Viewing a Request's Details Page

- To view a request's details page, the user can scroll through the Requests for Review list or use the Search Panel to navigate and find a specific request.
- Once the request has been found, click on the **ER No.** hyperlink.

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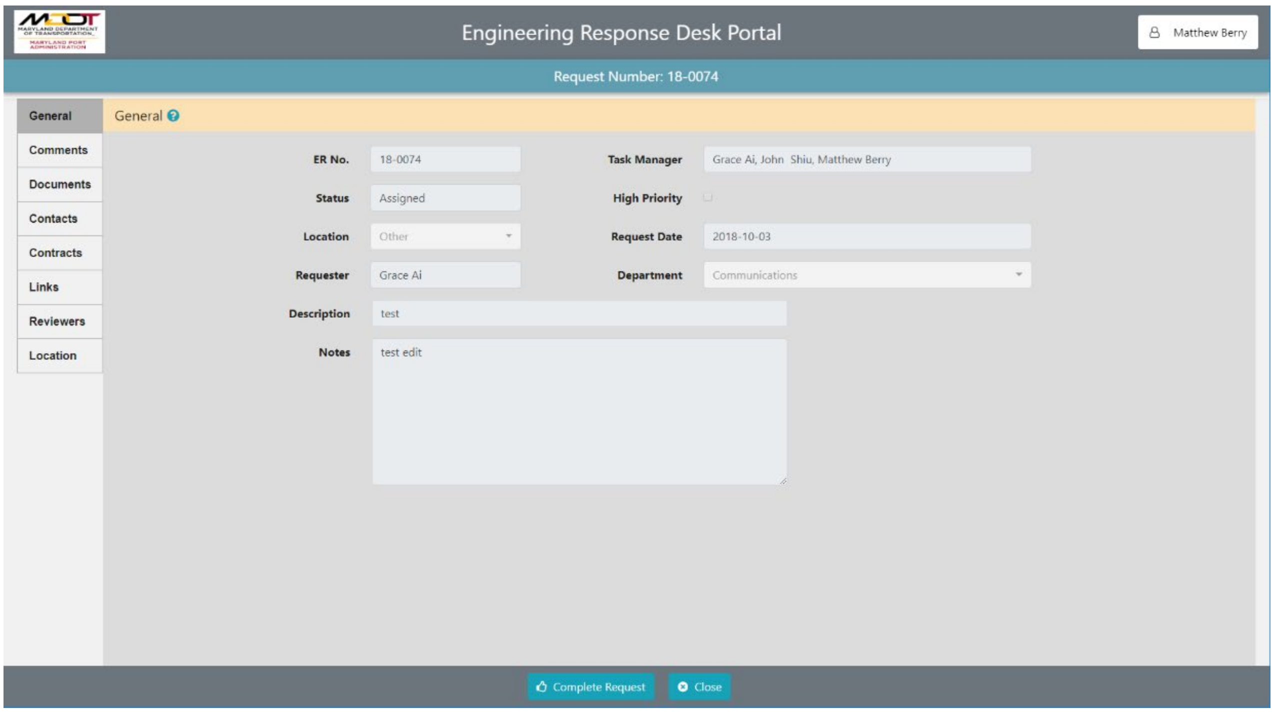
ER No.	Request Date
18-0078	10/3/18
18-0045	10/1/18
18-0043	9/28/18

- The Request's details page will load.

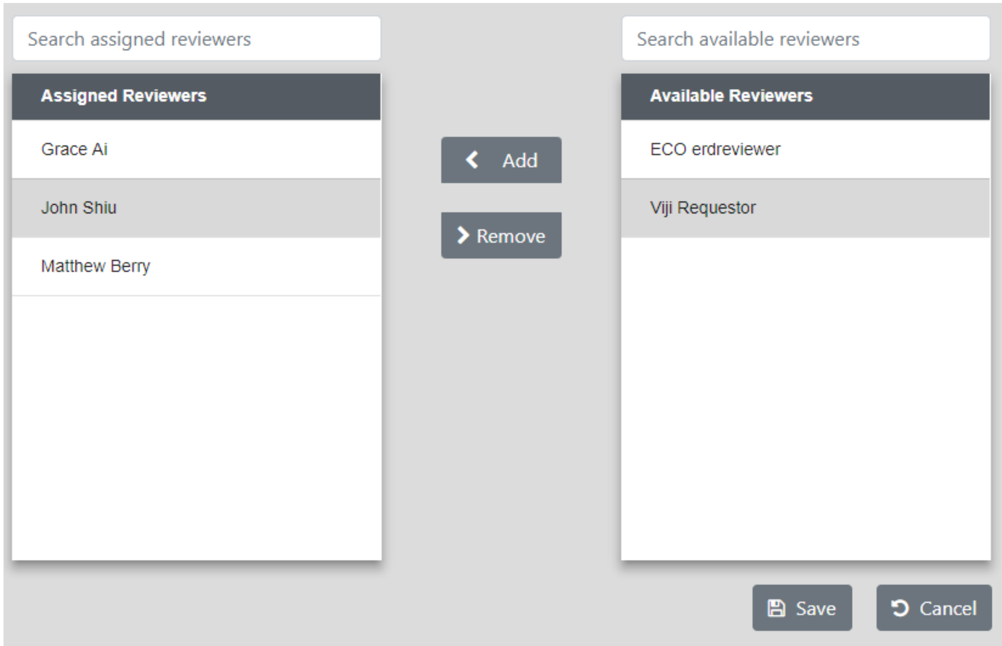


*See **Page 9**, under the Requester Role, for details on how to update and edit the fields in the Side-Tabs.

Adding/Removing a Reviewer to/from a Request

A reviewer has the option to add additional reviewers to a specific request.

- Open a request's details page and select the **Reviewers** side-tab on the left-hand side of the page.

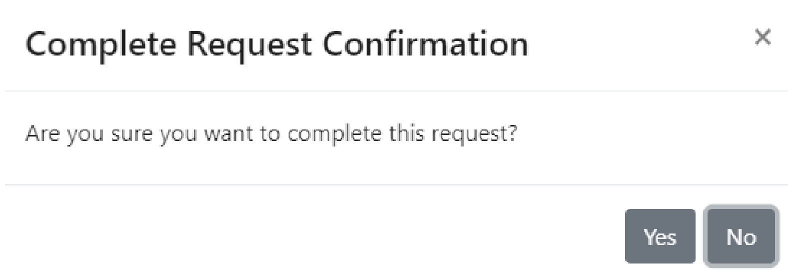


- Users can either scroll through the list of **Assigned Users** or **Available Users** or use the Search box at the top of the lists to narrow down results.
- Once they have found the Reviewer they wish to assign to or remove from the request, they can select the name in the list and click the **Add** button or **Remove** button. This will move the selected Reviewer to the correct list.
- Click **Save** to save the changes.

Completing a Request

Once a reviewer has reviewed and resolved a request they are assigned to, they can complete the request by clicking the **Complete Request** button at the bottom of the Request Page.

- A pop-up message will appear asking for confirmation on **completing** the request.
- Click **Yes** to complete or **No** to Cancel.



- Once a request has been marked as **Completed**, the requester will receive an e-mail notification.

Requester Role

The following sections will detail the layout, tools, and functions of the application for **Requesters**.

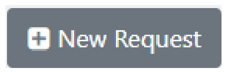
'Requests' Tab

The **Requests** tab, identical to the Reviews tab, displays all requests that the **user has submitted**. Requests are ordered by date of submission, from newest to oldest. From this page, users can check the status of a request, edit a request's information, or create a new request.

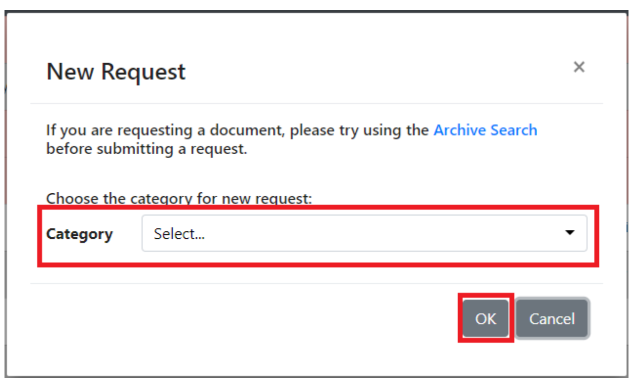
Creating a New Request

From the My Request List page, the user can click on the **New Request** button to Create a New Request.

- Underneath the Search Panel on the right-side of the page, click on the **New Request** button and the New Request pop-up is displayed.



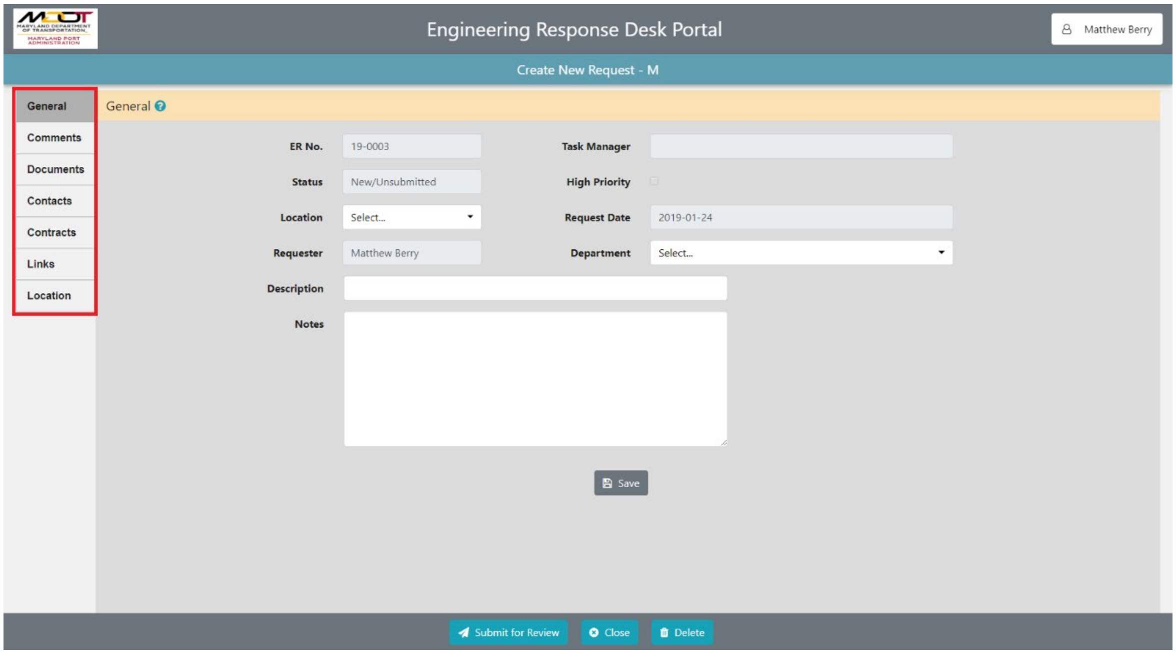
- This pop-up allows the user to choose the **Category** that closely matches the service request need, from a drop-down menu.
- Make the selection, then click **OK**.



- The **Create New Request** page will load into the browser.

Create New Request Page

The New Request Page Contains 7 Side-Tabs for the user to fill out with details about their request.



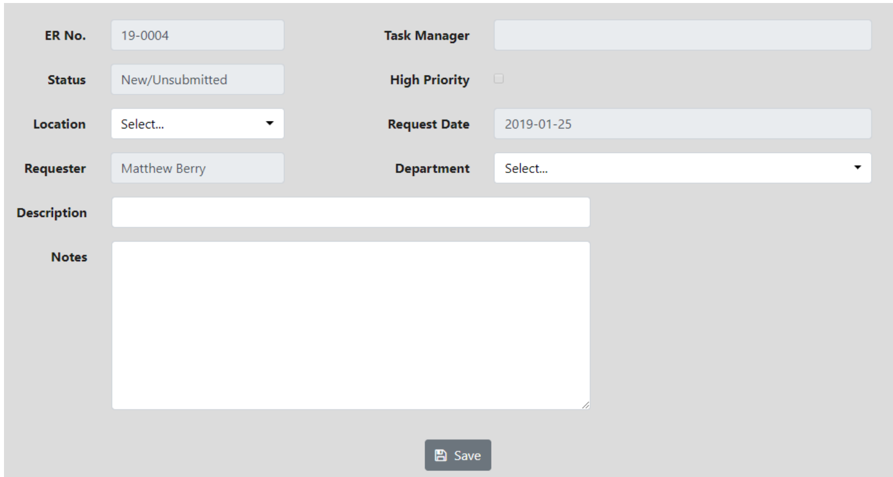
- **General –** Contains input fields with basic details regarding the request.
- **Comments –** Contains comment text boxes allowing for a means of communication between requesters and reviewers about specifics of the request.
- **Documents –** Contains a platform to upload documents, drawings, pictures, etc. to the application. This provides a centralized location where these can be accessed and downloaded.
- **Contacts –** Contains a contacts list with contact information of the requester, including Name, Company, E-mail, and Phone number.
- **Contracts –** Contains a list of Contracts supporting the request that users can add to.
- **Links –** Contains a platform for users to upload supporting URL or ProjectWise links detailing a request.
- **Location –** Contains a visual display of the spatial location of the new request.

Adding General Information

From the **General** tab on the Create New Request page, the user will be able to add the Location, Task Description, Department, and any relevant notes regarding the new request.

- Once all General request information is entered, click **Save**.

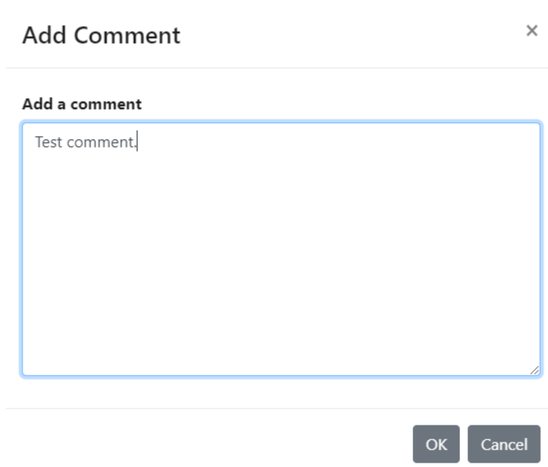
Note: The Engineering Request number (ER No.), Requester, Task Manager, Request Date, Department, and Status will all be auto-populated and cannot be edited. These text boxes will be greyed out.



Adding Comments

From the **Comments** tab on the New Request Page, users can click on the **Add Comment** button to add a comment.

Note: Comments can be added at any time throughout the lifecycle of a request, however, if a comment is added after the request has been submitted, the request's due date will be reset.

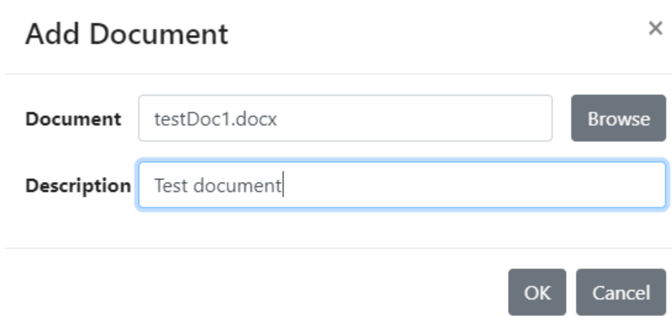


- Click **OK**. The comment will be posted to the comment wall with the time and date stamp.

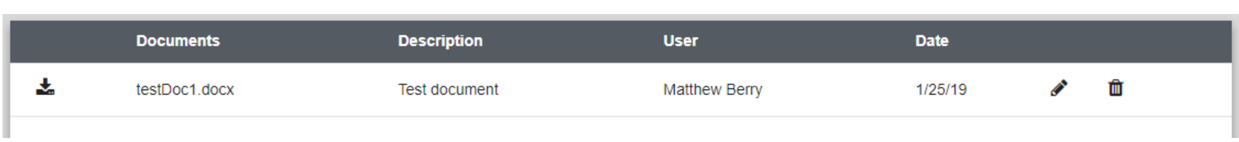
Adding Documents

From the **Documents** tab on the New Request Page, users can click on the **Add Document** button and the Add Document pop-up is displayed.

From here, the user can browse to the location of their document and add it to the request along with a brief description of the document for reference.



- Click **OK**. The document will be added to the Document list.



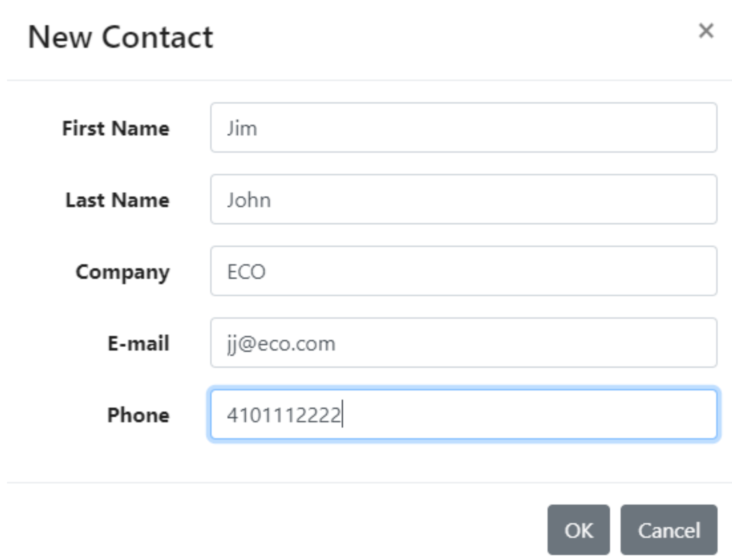
	Documents	Description	User	Date		
	testDoc1.docx	Test document	Matthew Berry	1/25/19		

Adding Contacts

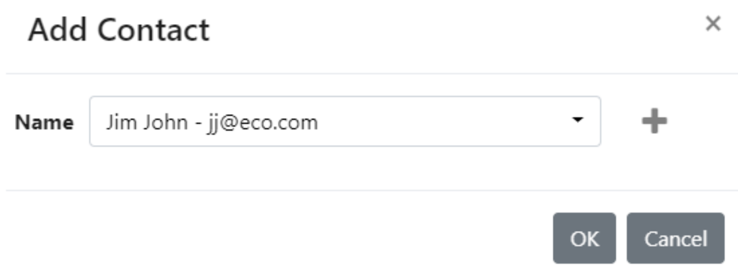
From the **Contacts** tab on the New Request Page, users can click on the **Add Contact** button and the Add Contact pop-up is displayed.

From here, the user can select their Contact information from a dropdown menu.

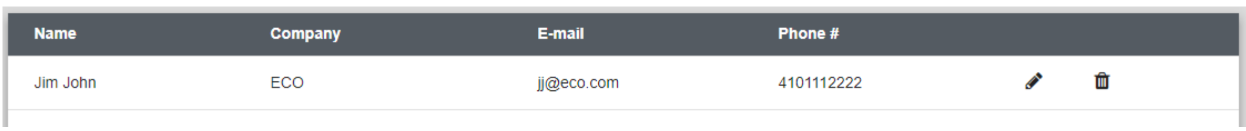
If their contact information is not available from the menu because they are a new requester, they will need to click the plus/add (+) button next to the drop-down menu to Add a new Contact. The Add New Contact pop-up will appear where the user can enter the Name, Company, E-mail, and Phone number of the new contact which will then add this requester to the Contacts database for future requests.



- Click **OK**. The new contact will then appear in the Add Contacts pop-up.



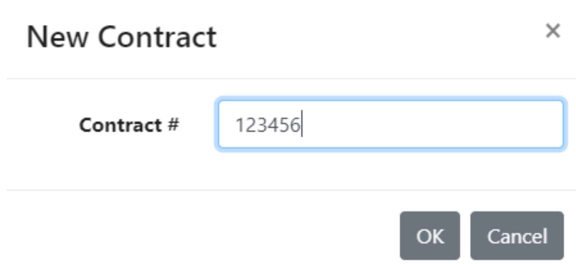
- Click **OK** in the Add Contacts pop-up and the new contact will appear in the Contacts list.



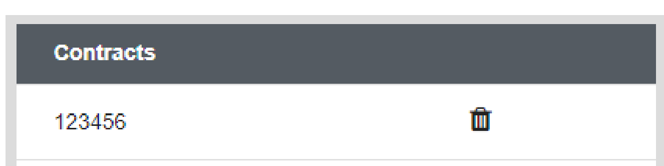
Adding Contracts

From the **Contracts** tab on the New Request Page, users can click on the **Add Contract** button and the Add Contract pop-up is displayed.

From here, the user can enter in a Contract Number supporting the request.



- Click **OK**. The contract number will be added to the Contracts list.



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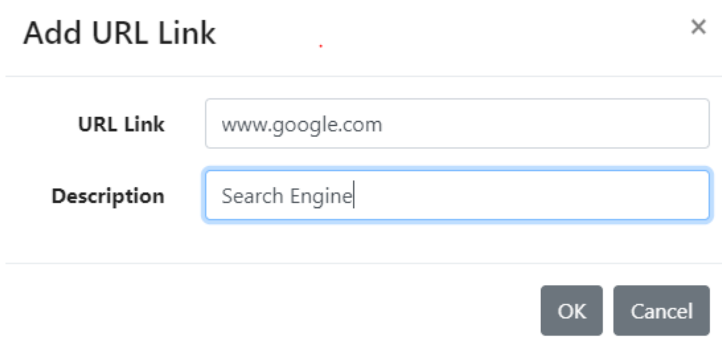
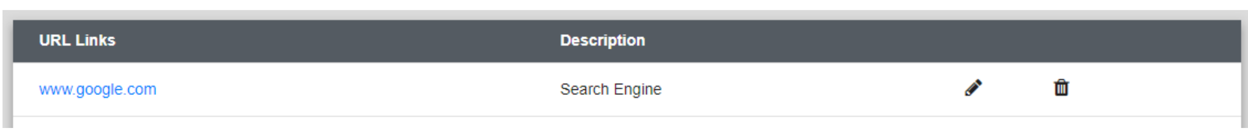
Adding Links

From the **Links** tab on the New Request Page, users can click on the **Add Link** button and the Add Link pop-up is displayed.

From here, the user can copy a hyperlink into the link textbox and a description of the link giving more information on the request into the Description textbox.



- Click **OK.** The link will be added to the URL links list.

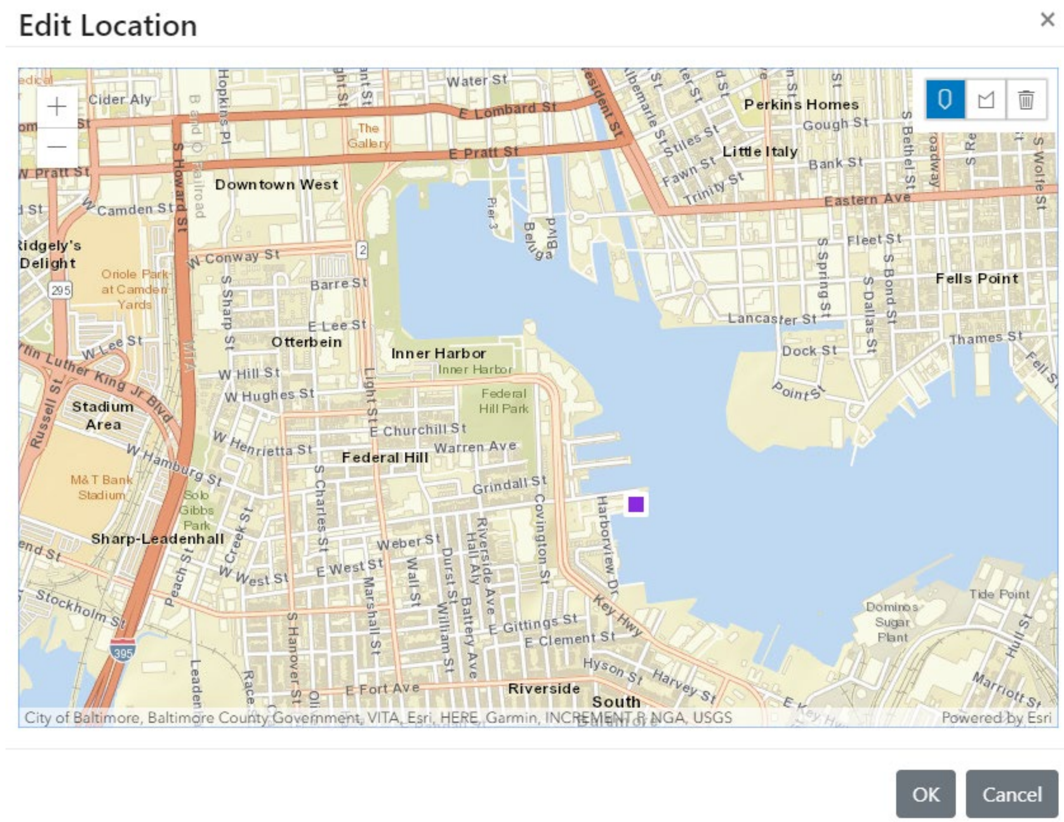


Adding Location

From the **Location** tab on the New Request Page, users can click on the Edit Location button and the Edit Location pop-up id displayed.

From here, the user can click the Pin or Polygon Shape to either drop a point or polygon to mark the requests spatial locations on the map.

- Click the **+** or **–** buttons at the top left of the Edit Location pop-up or the mouse wheel to zoom in or out of the map.



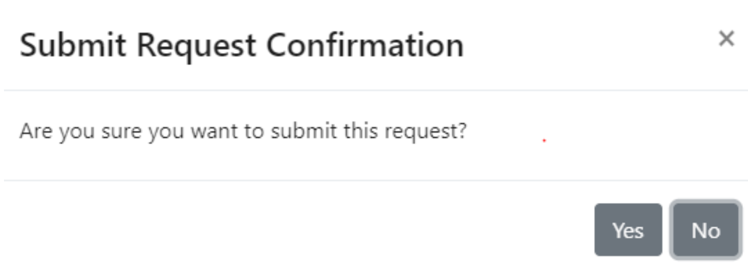
- Click **OK**. The point or polygon will display on the map to mark the general location of the request.

Submitting Requests for Review

Once the user has completed filling out all New Request details and fields, they can choose to **Submit for Review, Close** or **Delete**.

<u>**Submit for Review**</u> – Completes the New Request. The Status will be either **Submitted** or **Assigned** and will be added as the first entry in the My Requests List ready for review.

- A pop-up message will appear asking for confirmation on **submitting** the request.
- Click **Yes** to Submit or **No** to Cancel.



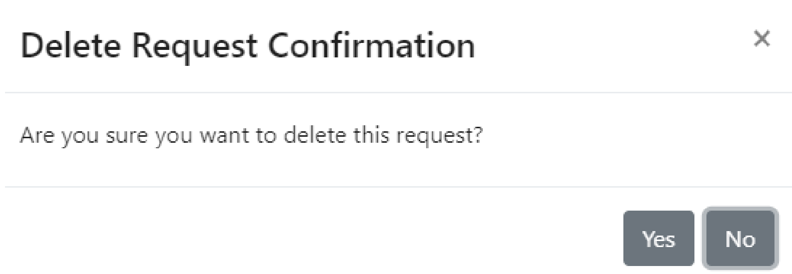
- The **Create New Request** page will close and the **My Request List** will appear.

<u>Close</u> – Saves all details and field information for the new request and can be accessed, edited, and submitted later. The Status will be **New/Unsubmitted** and will be added to the My Requests List where it can be accessed.

- The **Create New Request** page will close and the **My Request List** will appear.

<u>Delete</u> – Deletes all field information and details filled out for the New Request.

- A pop-up message will appear asking for confirmation on **deleting** the request.
- Click **Yes** to Submit or **No** to Cancel.



- The **Create New Request** page will close and the **My Request List** will appear.

Downloading Documents

From the Documents tab, users can click on the Download icon ( ) next to a document in the Documents list and choose the folder location where they want to download the document(s) to.

Editing a Submitted Request

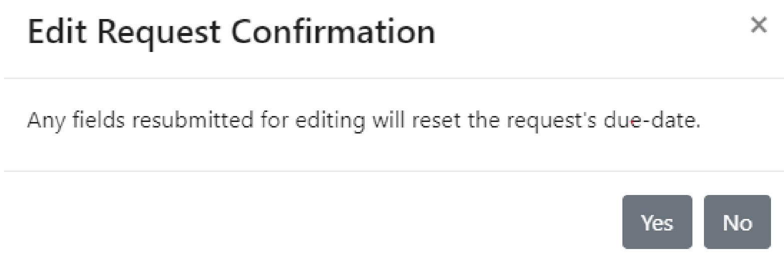
If the user needs to **edit** or **add details to a previously submitted request**, they can:

- Select the request's **ER No**. from the **My Requests List** in the **Requests** tab. The Request page will appear.
- Select the **Unlock for Editing** button at the bottom of the page.

- A pop-up message will appear asking for confirmation on **editing** the request.

  Note: If <u>any</u> Edits are made after the original request has been submitted, then the due-date for that request is reset.

- Click **Yes** to proceed or **No** to Cancel.



Assigner Role

The following sections will detail the layout, tools, and functions of the application for the **Assigner** role.

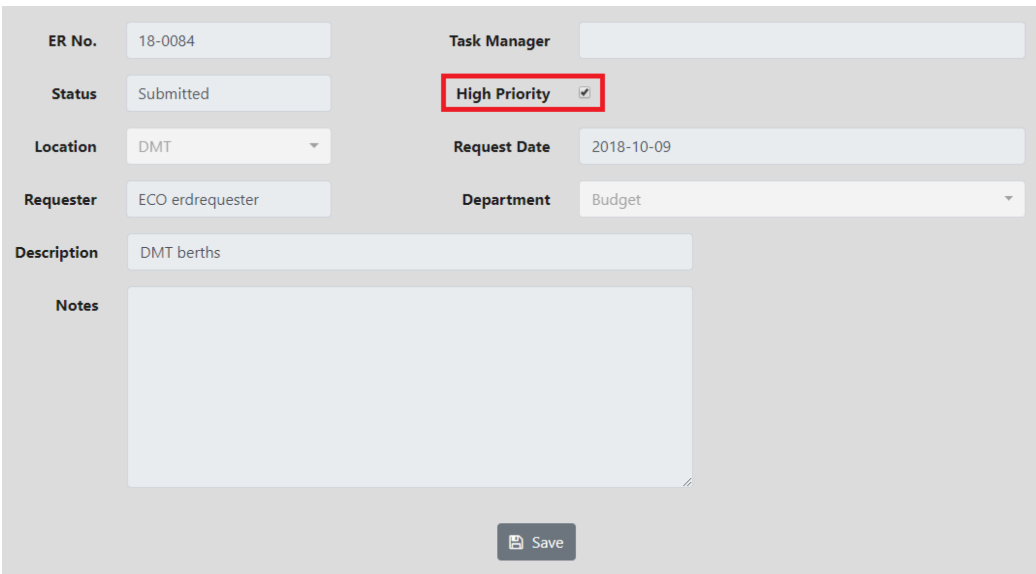
‘Assignments’ Tab

The Assignments tab displays a list of **Requests for Assignment**. These are **all requests that have been submitted** but **<u>haven’t been assigned to a reviewer</u>.**

Marking a Request as High Priority

Assigner’s are the only ERDP user’s that can mark a newly submitted request as a **High Priority** request.

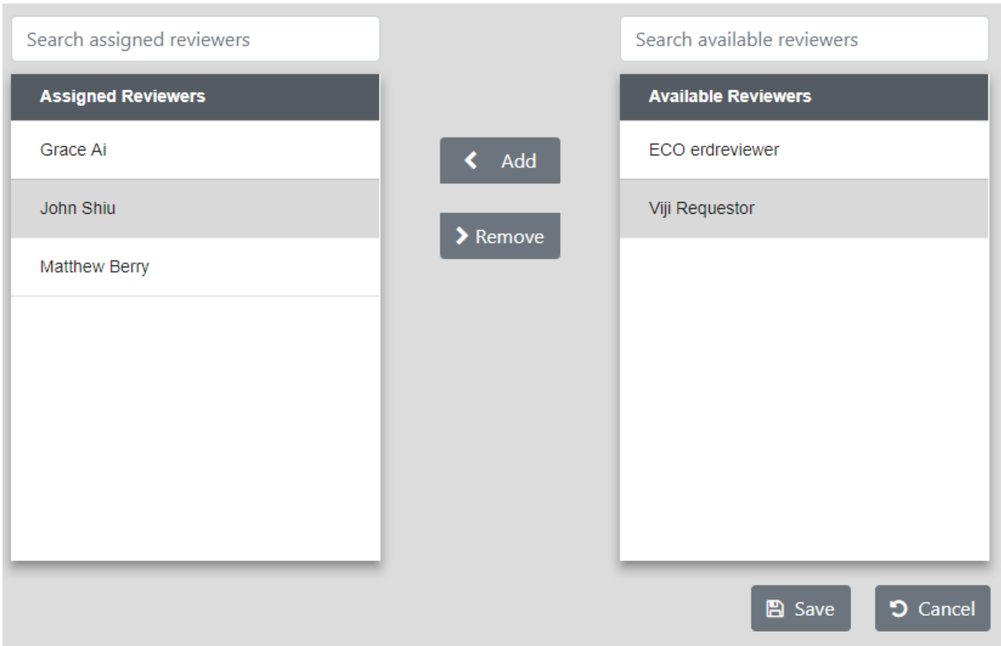
- In the **Requests for Assignment** list, click on the request’s **ER No.** to open the request’s details page.
- In the General side-tab tab there is a High Priority checkbox.
- Click this checkbox to mark this request as a High Priority request.



- Click **Save**. This will **Flag (**  **)** this request in the <u>reviewers</u> **Requests for Review** list letting them know this is a High Priority request.

Adding/Removing a Reviewer to/from a Request.

- Open a request's details page and select the **Reviewers** side-tab on the left-hand side of the page.

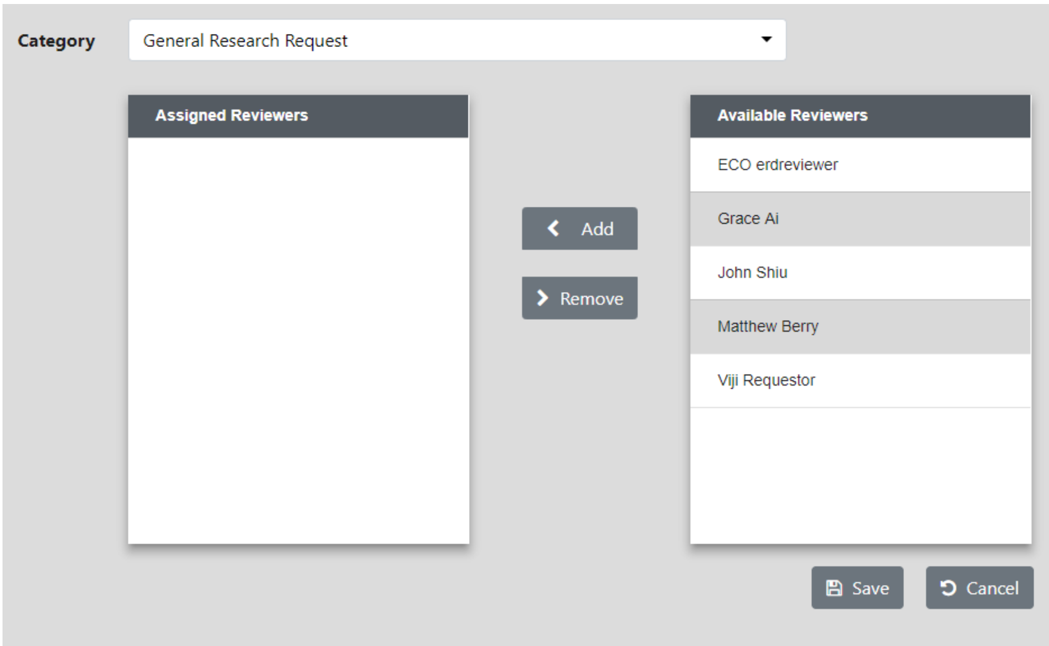


- Users can either scroll through the list of **Assigned Users** or **Available Users** or use the Search box at the top of the lists to narrow down results.
- Once they have found the Reviewer they wish to assign to or remove from the request, they can select the name in the list and click the **Add** button or **Remove** button. This will move the selected Reviewer to the correct list.
- Click **Save** to save the changes.

'Assignment Rules' Tab

In the Assignment Rules tab the assigner can **auto-assign a request Category to a Reviewer or Reviewers**. This will make it so that when a new request has been submitted, the Reviewers assigned to that request **Category will be auto-assigned and notified**.

Auto-assigning a Request Category to a Reviewer(s)



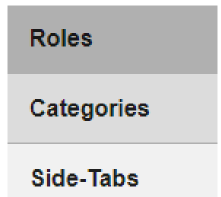
- Assigners can select the **Category** they want to auto-assign Reviewers to from the Category drop-down list
- Next, scroll through the list of **Assigned Reviewers** or **Available Reviewers** or use the Search box at the top of the lists to narrow down results.
- Once they have found the Reviewer they wish to assign to or remove from the request category, they can select the name in the list and click the **Add** button or **Remove** button. This will move the selected Reviewer to the correct list.
- Click **Save** to save the changes.
- This will auto-assign all new requests under a given Category to the(se) Reviewer(s)

Administrator Role

The following sections will detail the layout, tools, and functions of the application for the **Administrator** role.

'Admin' Tab

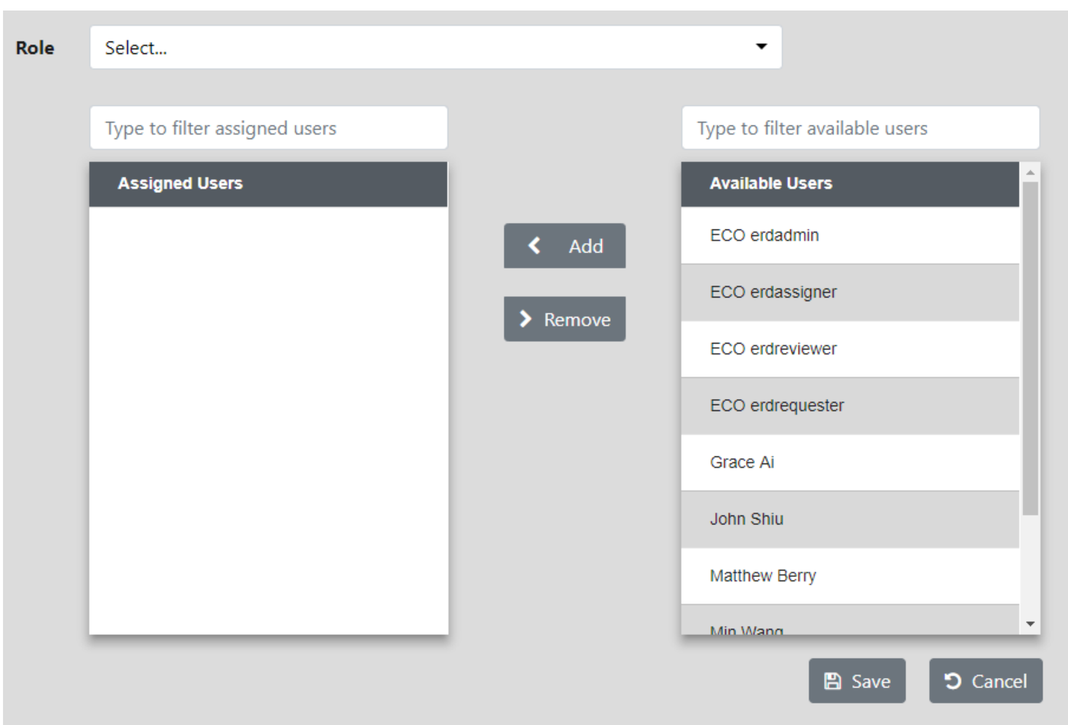
The Admin tab gives the user the ability to assign individual users to roles (Requester, Reviewer, Reports, Assigner, and Administrator), edit Request categories, and Side-Tabs on the Request Details page.



The 'Admin' tab consists of 3 Side-tabs:

- **Roles** – Allows the administrator to Assign roles to available users.
- **Categories** – Allows the administrator to add a new category for new requests or edit existing data about a request (Name, Code, Due-Date).
- **Side-Tabs –** Allows the administrator to select which Side-Tabs will be available for requesters and reviewers within a certain requests Details Page.

Assigning User Roles



- In the Roles tab, administrators can select the **Role** they want to assign a Reviewer(s) to from the Role drop-down list.
- Next, scroll through the list of **Assigned Users** or **Available Users** or use the Search box at the top of the lists to narrow down results.
- Once they have found the User they wish to assign or remove the role to/from, they can select the name in the list and click the **Add** button or **Remove** button. This will move the selected User to the correct list.
- Click **Save** to save the changes.

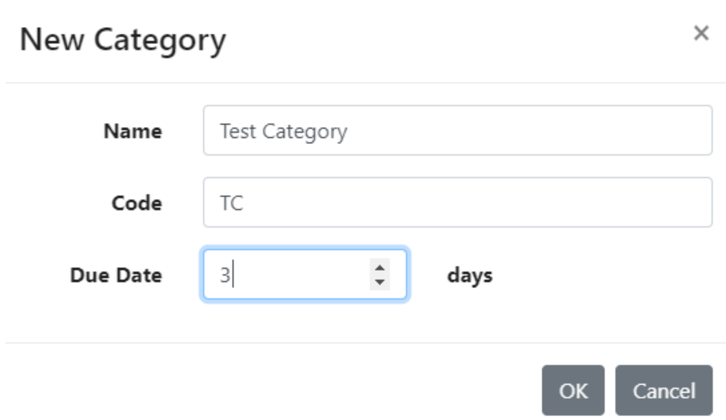
This determines who will have access to the 6 available tabs at the top of the ERDP application.

Reports **Admin** **Assignment Rules** **Assignments** **Reviews** **Requests**

Adding New Categories

- In the Categories tab, administrators can click the **Add New Category** button to add a new request category for new requests.

- The **Add Category** pop-up window will appear.
- Enter in the **Name** for the new category, assign a **Code**, and select the number of days the category needs to be competed in **the Due Date** drop-down menu.
- Click **OK** to create or **Cancel** to exit.



- The new category is added to the Category list.

Editing Categories

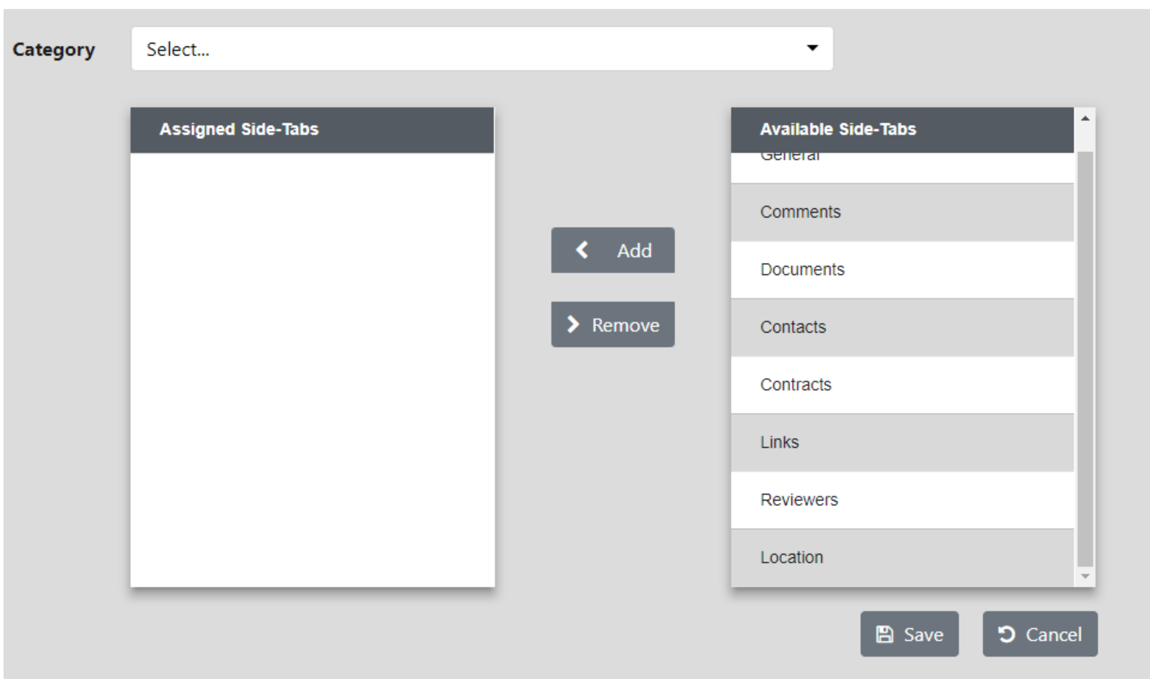
To edit a Category in the Categories list:

- Click the edit pencil ( ) next to the Category to edit.

Category	Code	Due Date	
Cargo Load/Heavy Lift Analysis/Wharf Structure Evaluation	L	2 days	
Contract Administration Request	C	2 days	

- The **Edit Category** pop-up window will appear.
- Edit the changes needed.
- Click **OK** to create or **Cancel** to exit.
- The edited changes will be reflected in the Category list.

Editing Side-Tabs



- In the Side-Tabs tab, administrators can select the **Category** they want to add or remove certain Side-Tabs to from the Category drop-down list.
- Next, select from the list of **Assigned Side-Tabs** or **Available Side-Tabs** which they want to add or remove from that request categories Details Page.
- Click the **Add** button or **Remove** button. This will move the selected Side-Tab to the correct list.
- Click **Save** to save the changes.
- This will add or remove these Side-Tab(s) to these types of request categories Details Page.

Reports Role

'Reports' Tab

The Reports tab gives the user the ability to generate, review, and print reports.

- Users can select the 5 report options within the Reports tab, or they user can use the **Report Filter** to create their own custom reports by using the filters text and drop-down options.

Create a Report

- Use the Report side-menu to select what kind of report to generate.
  - <u>**These include**</u>:
    - Requests by Category
    - Requests by Requester
    - Assigned Requests by Reviewer
    - Min/Avg/Max response time by Category
    - Min/Avg/Max response time by Reviewer

- Depending on the type of report selected, the content in the Reports page will change.
- Use the Report Filter at the top of the panel to filter information for the report.
- Click the **View/Print Report** button at the bottom of the Report screen to print.