# Engineering Response Desk Portal

# REVIEWER/ ASSIGNER/ ADMIN/ REPORTS USER GUIDE

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MARYLAND PORT ADMINISTRATION

# Maryland Department of Transportation

Maryland Port Authority

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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.

Reviews	Requests
---------	----------

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.

MARYLAND DEPARTMENT OF TRANSPORTATION MARYLAND PORT			E	ngineeri	ng Resp	onse Desk	Portal		පී Matthey	w Berry
Requests for Review										
Reports Admin Assignment Rules Assignments Reviews Requests										
Q Search Panel			To search for a specific reques	t, open the search p	anel by clicking anyw	here in the search pane	l header.			~
13 results			(Please note: o	overdue reques	ts will be highlig	hted in pink and h	igh priority requests will be red-flagged)			
ER No.	Request Date	Requester	Task Description	Dept.	Location	Category	Engineering Task Manager	Status (	Completion Date	Î
<u>18-0074</u>	10/3/18	Grace Ai	test			MU	Grace Ai, John Shiu, Matthew Berry	Assigned		
<u>18-0073</u>	10/3/18	Viji Requestor				MU	Grace Ai, John Shiu, Matthew Berry	Assigned		
<u>18-0072</u>	10/3/18	Grace Ai	test new			MU	Grace Ai, John Shiu, Matthew Berry	Assigned		
<u>18-0071</u>	10/3/18	Grace Ai				MU	Grace Ai, John Shiu, Matthew Berry	Assigned		
<u>18-0070</u>	10/3/18	Viji Requestor				MU	Grace Ai, John Shiu, Matthew Berry	Assigned		
<u>18-0069</u>	10/3/18	Viji Requestor				MU	Grace Ai, John Shiu, Matthew Berry	Assigned		
<u>18-0068</u>	10/3/18	Viji Requestor				MU	Grace Ai, John Shiu, Matthew Berry	Assigned		
<u>18-0067</u>	10/3/18	Viji Requestor				MU	Grace Ai, John Shiu, Matthew Berry	Assigned		
<u>18-0066</u>	10/3/18	Viji Requestor				MU	Grace Ai, John Shiu, Matthew Berry	Assigned		
<u>18-0065</u>	10/3/18	Viji Requestor				MU	Grace Ai, John Shiu, Matthew Berry	Assigned		
<u>18-0064</u>	10/3/18	Viji Requestor				MU	Grace Ai, John Shiu, Matthew Berry	Assigned		
<u>18-0063</u>	10/3/18	Viji Requestor				MU	Grace Al, 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.

```
Q Search Panel To sear
```

To search for a specific request, open the search panel by clicking anywhere in the search panel header.

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

MANY MAKES DEPENDING NY	Engineering Response Desk Portal					
	Requests for Review					
Reports Admin A	Assignment Rules Assignments Reviews Requests					
Q. Search Panel	To close the securit panel, click asymmetrie in the panel header	^				
ER No.	Task Manager					
Location	All Category All	•				
Request Date	yyyy-mm-dd 🗐 to yyyy-mm-dd					
Status	Assigned  Completion Date yyyy-min-dd					
Department	All  Contract No.					
Requester	All					
Task Description						
	Q. Search D Resal					

- 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.



• The Request's details page will load.

MARYLAND DEPARTMENT OF TAX REPORTATION MARYLAND PORT		Engine	eering Response De	sk Portal	A Matthew Berry
			Request Number: 18-00		
General	General 😮				
Comments	ER No.	18-0074	Task Manager	Grace Ai, John Shiu, Matthew Berry	
Documents	Status	Assigned	High Priority		
Contacts	Location	Other	Request Date	2018-10-03	
Contracts					
Links	Requester	Grace Ai	Department	Communications	
Reviewers	Description	test			
Location	Notes	test edit			
		_			
			🖒 Complete Request 🛛 🙁 C	lose	

\*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.

Search assigned reviewers		Search available reviewers
Assigned Reviewers		Available Reviewers
Grace Ai	< Add	ECO erdreviewer
John Shiu	> Remove	Viji Requestor
Matthew Berry	Remove	
		🖺 Save 🍤 Cancel

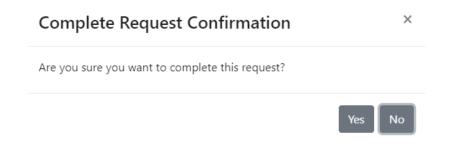
- Users can either scroll through the list of **Assigned Users** or **Available Users** or use the Search box at the top of the lists to narrow down results.
- Once they have found the Reviewer they wish to assign to or remove from the request, they can select the name in the list and click the **Add** 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.

🖒 Complete Request

- 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**.

rch	questing a document, please try using the Archive Sear	lf vou are re
	nitting a request.	
	category for new request:	Choose the
•	Select	Category
	Select	Category

• 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.

MARYLAND PORT		Engine	eering Response De	sk Portal		A Matthew Berry
			Create New Request - I	м		
General	General 📀					
Comments	ER No.	19-0003	Task Manager			
Documents	Status	New/Unsubmitted	High Priority			
Contacts	Location	Select 👻	Request Date	2019-01-24		
Contracts	Requester	Matthew Berry	Department	Select	•	
Links	Description	induited beny	ocpuration	Jelecta		
Location						
	Notes					
			🖺 Save			
_		_	_	_		
		🛃 Si	ubmit for Review 🙁 Close	📋 Delete		

- **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.

ER No.	19-0004	Task Manager		
Status	New/Unsubmitted	High Priority		
Location	Select 💌	Request Date	2019-01-25	
Requester	Matthew Berry	Department	Select	
escription				
Notes				
		_		
		🖹 Save		

#### **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.

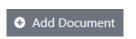
Add Comment	×
Add a comment	
Test comment.	
	OK Cancel

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

Test comment.	
Matthew Berry	
1/25/19, 9:11 AM	
	🗩 Add Comment

#### **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.

Add Doc	ument	×
Document	testDoc1.docx	Browse
Description	Test document	
		OK Cancel

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

	Documents	Description	User	Date		
*	testDoc1.docx	Test document	Matthew Berry	1/25/19	(and	Û

#### 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.

Add	Contact		×
Name	select	•	+
		ОК	Cancel

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.

New Contac	t	×
First Name	Jim	
Last Name	John	
Company	ECO	
E-mail	jj@eco.com	
Phone	4101112222	
		_
	OK Can	cel

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

Add	Contact	×
Name	Jim John - jj@eco.com	• +
		OK Cancel

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

Name	Company	E-mail	Phone #		
Jim John	ECO	jj@eco.com	4101112222	(a)	Ŵ

#### **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.

New Contract		
Contract #	123456	
		OK Cancel

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



#### 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.

Add URL Link			×
URL Link	www.google.com		
Description	Search Engine		
		OK Cance	el

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

URL Links	Description		
www.google.com	Search Engine	(a)	Ŵ

#### Adding Location

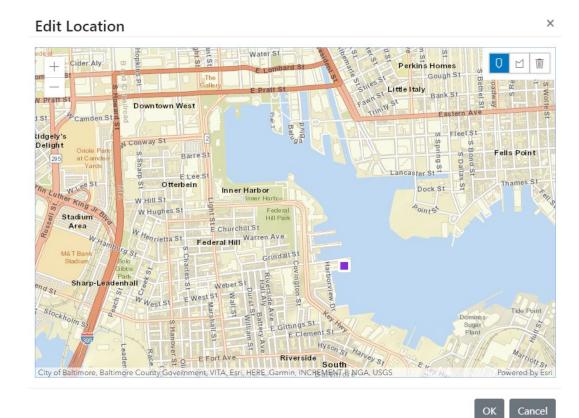
From the **Location** tab on the New Request Page, users can click on the Edit Location button and the Edit Location pop-up id displayed.



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.

Submit Request Confirmation	×
Are you sure you want to submit this request?	
	Yes No

• 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.

**Delete** – 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.

Delete Request Confirmation	×
Are you sure you want to delete this request?	
	Yes No

• 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 ( $\stackrel{l}{\sim}$ ) 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:

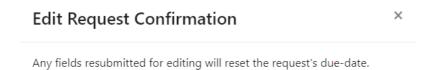
- Select the request's **ER No**. from the **My Requests List** in the **Requests** tab. The Request page will appear.
- Select the **Unlock for Editing** button at the bottom of the page.



• 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 duedate 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 **haven't been assigned to a reviewer**.

#### 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.

ER No.	18-0084		Task Manager	
Status	Submitted		High Priority	
Location	DMT	-	Request Date	2018-10-09
Requester	ECO erdrequester		Department	Budget
Description	DMT berths			
Notes				
			🕒 Save	

• 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.

Search assigned reviewers		Search available reviewers					
Assigned Reviewers		Available Reviewers					
Grace Ai	< Add	ECO erdreviewer					
John Shiu	➤ Remove	Viji Requestor					
Matthew Berry	✓ Keniove						
		🖺 Save 🏾 🤊 Cancel					

- 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)

Category	General Research Request		•			
	Assigned Reviewers		Available Reviewers			
			ECO erdreviewer			
		< Add	Grace Ai			
		> Remove	John Shiu			
		Kemove	Matthew Berry			
			Viji Requestor			
			🖺 Save 🍤 Cancel			

- 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.

Roles
Categories
Side-Tabs

#### 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.

Role	Select		•				
	Type to filter assigned users Assigned Users		Type to filter available users				
		▲ Add	ECO erdadmin				
		> Remove	ECO erdassigner				
		Remove	ECO erdreviewer				
			ECO erdrequester				
			Grace Ai				
			John Shiu				
			Matthew Berry				
			Min Wang				
			🖺 Save 🕽 Cancel				

#### 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.

Add New Category

- 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.

New Catego	ry	×
Name	Test Category	
Code	TC	
Due Date	3 ¢ days	
	OK Can	cel

• 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	ø
Contract Administration Request	С	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**

Category	Select		•
	Assigned Side-Tabs		Available Side-Tabs
			Comments
		< Add	Documents
		> Remove	Contacts
			Contracts
			Links
			Reviewers
			Location
			🖺 Save 🕽 Cancel

- 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.
  - These include:
    - 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.

Report Filter									
Request Date	yyyy-mm-dd		to yyyy-mm-dd			Requester	All		
Category	All			•		Reviewer	All		
Department	All			•					
			Generate Repor	t 🛛 Reset					
Requests by Category				Requests by Cate	gory				
Requests by Requester		M G	L CAD IR	MU C DCN	Category	Code	No Of A Requests		
				Miscellaneous Request	м	25			
Assigned Requests by Reviewer						General Research Request	G	1	
Min/Avg/Max response time by Category						Cargo Load/Heavy Lift Analysis/Wharf Structure Evaluation	εL	2	
Min/Avg/Max response time						Drafting & Printing Services	CAD	3	
by Reviewer						Information Request	IR	2	
						Miss Utility Notice	MU	16	
						Contract Administration Request	С	2	
				입 View/Print Repor	t				