

Engineering Response Desk Portal

REQUESTER USER GUIDE

Prepared By:



ECO Integration, Inc.
8840 Columbia 100 Pkwy, Ste 120
Columbia, MD 21045



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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>

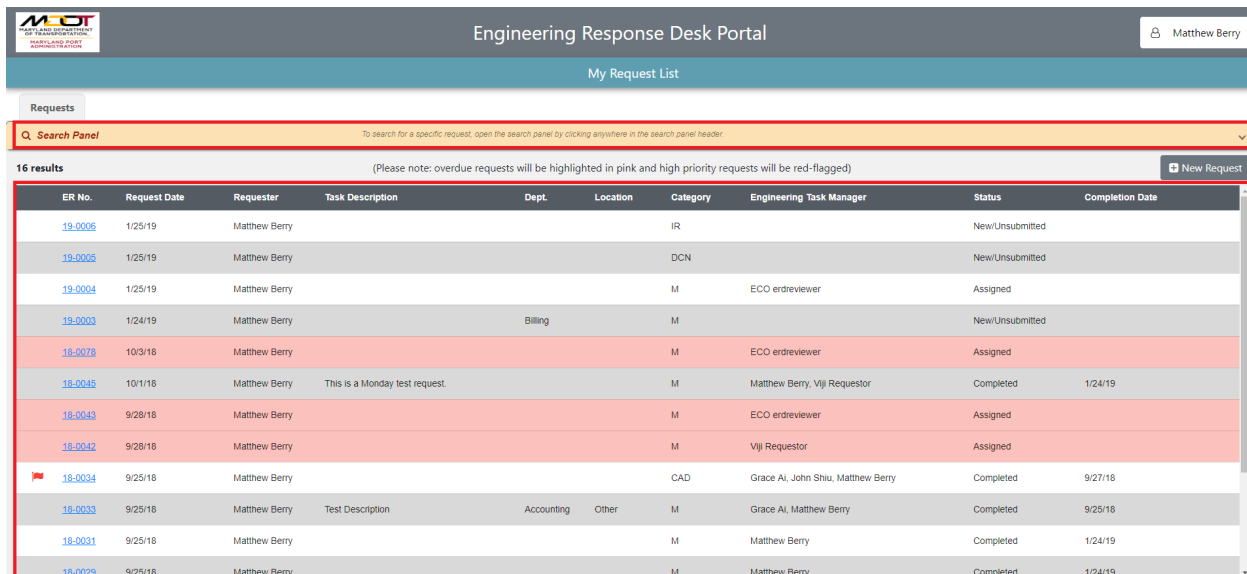
Requester Role

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

'Requests' Tab

When a Requester logs-in to the Engineering Response Desk Portal, they will be presented with the **Requests** tab displaying **My Request List**. This is a list consisting of all requests they have submitted with the most recent at the top of the list. From this page, users can check the status of a request, edit a request's information, or create a new request.

The **Requests** tab is composed of the **Search Panel**, and the **My Request List** below.



ER No.	Request Date	Requester	Task Description	Dept.	Location	Category	Engineering Task Manager	Status	Completion Date
19-0006	1/25/19	Matthew Berry				IR		New/Unsubmitted	
19-0005	1/25/19	Matthew Berry				DCN		New/Unsubmitted	
19-0004	1/25/19	Matthew Berry				M	ECO erdreviewer	Assigned	
19-0003	1/24/19	Matthew Berry		Billing		M		New/Unsubmitted	
18-0078	10/3/18	Matthew Berry				M	ECO erdreviewer	Assigned	
18-0045	10/1/18	Matthew Berry	This is a Monday test request.			M	Matthew Berry, Viji Requestor	Completed	1/24/19
18-0043	9/28/18	Matthew Berry				M	ECO erdreviewer	Assigned	
18-0042	9/28/18	Matthew Berry				M	Viji Requestor	Assigned	
18-0034	9/25/18	Matthew Berry				CAD	Grace Ai, John Shiu, Matthew Berry	Completed	9/27/18
18-0033	9/25/18	Matthew Berry	Test Description	Accounting	Other	M	Grace Ai, Matthew Berry	Completed	9/25/18
18-0031	9/25/18	Matthew Berry				M	Matthew Berry	Completed	1/24/19
18-0028	9/25/18	Matthew Berry				M	Matthew Berry	Completed	1/24/19


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The **My Request List** consists of these fields:

ER No.	Request Date	Requester	Task Description	Dept.	Location	Category	Engineering Task Manager	Status	Completion Date
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- **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 requester’s name.
- **Task Description** – Displays a description of the request.
- **Department** – Displays the department associated with the request.
- **Location** – Displays the 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.

The **My Request List** has three classifications for requests:

- Requests submitted without any indicators are neither high priority or overdue.
- Requests that are red-flagged  indicate requests that are **high priority**.
- Requests that are highlighted in **pink** indicate requests that are **overdue**.

Using the Search Panel

Users can find existing requests by utilizing the Search Panel at the top of the page to filter and narrow results by specific details. Click anywhere in the search panel header to show or hide the panel.

Search Panel

To close the search panel, click anywhere in the panel header

ER No.

Task Manager

Location

All

Category

All

Request Date

yyyy-mm-dd

to

yyyy-mm-dd

Status

All

Completion Date

yyyy-mm-dd

Department

All

Contract No.

Requester

All

High Priority

☐

Task Description

Search

Reset

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Viewing a Request's Details Page

- To view a request's details page, the user can scroll through the **My Request 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.

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.

The screenshot displays the 'Engineering Response Desk Portal' interface. At the top, the portal title and a user profile for 'Matthew Berry' are visible. Below this, a header bar indicates the 'Request Number: 18-0074'. The main content area is divided into a left sidebar with navigation links (General, Comments, Documents, Contacts, Contracts, Links, Reviewers, Location) and a central form. The 'General' tab is active, showing fields for 'ER No.' (18-0074), 'Status' (Assigned), 'Location' (Other), 'Requester' (Grace Ai), 'Task Manager' (Grace Ai, John Shiu, Matthew Berry), 'High Priority' (unchecked), 'Request Date' (2018-10-03), 'Department' (Communications), 'Description' (test), and 'Notes' (test edit). At the bottom, there are two buttons: 'Complete Request' and 'Close'.

ER No.	Request Date
18-0074	2018-10-03

Request Number: 18-0074

General

Comments

Documents

Contacts

Contracts

Links

Reviewers

Location

ER No. 18-0074

Status Assigned

Location Other

Requester Grace Ai

Task Manager Grace Ai, John Shiu, Matthew Berry

High Priority ☐

Request Date 2018-10-03

Department Communications

Description test

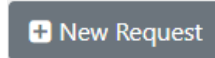
Notes test edit

Complete Request Close

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Creating a New Request

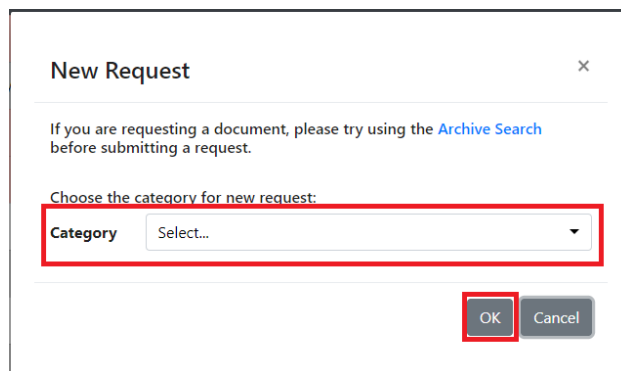
From the My Request List page, the user can click on the **New Request button** to Create a New Request. Underneath the Search Panel on the right-side of the page, click on the New Request button and the New Request pop-up is displayed.



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

Note: There is a link on the New Request pop-up to an **Archive Search**. If the user is requesting a document, it is possible it may be found in this archive. Users should always check this archive before following through with submitting a request. This will help manage the number of duplicate requests coming through the system.

- Make the selection, then click **OK**.

A screenshot of a "New Request" pop-up window. The window has a title bar with "New Request" and a close button (X). Inside, there is a message: "If you are requesting a document, please try using the [Archive Search](#) before submitting a request." Below this, it says "Choose the category for new request:". There is a dropdown menu labeled "Category" with "Select..." as the current selection. At the bottom right, there are two buttons: "OK" and "Cancel". A red rectangle highlights the "Category" dropdown menu, and another red rectangle highlights the "OK" button.

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

Create New Request Page: The **Create New Request** page contains side-tabs for the user to fill out with details about their request. The side-tabs that are displayed depends on the category of the request.

These side-tabs are:

- **General** – Contains input fields for basic information regarding the request.
- **Comments** – Contains a section where requesters and reviewers can post comments regarding the request.
- **Documents** – Contains a table to upload supporting documents about the request.
- **Contacts** – Contains a table with contact information of the requester including Name, Company, E-mail, and Phone number.
- **Contracts** – Contains a table to add supporting contract numbers about the request.
- **Links** – Contains a table to upload supporting links about the request.
- **Location** – Contains a map visual of the location of the request.

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

The screenshot shows the 'Create New Request' form in the Engineering Response Desk Portal. The 'General' tab is active and highlighted with a red box. The form contains the following fields and options:

- ER No.:** 19-0003
- Status:** New/Unsubmitted
- Location:** Select...
- Requester:** Matthew Berry
- Task Manager:** [Empty field]
- High Priority:** [Unchecked checkbox]
- Request Date:** 2019-01-24
- Department:** Select...
- Description:** [Empty text box]
- Notes:** [Empty text box]

A 'Save' button is located at the bottom center of the form. The footer of the page contains three buttons: 'Submit for Review', 'Close', and '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.

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The screenshot shows a form for creating a new request. It includes fields for ER No. (19-0004), Task Manager, Status (New/Unsubmitted), High Priority (checkbox), Location (dropdown), Request Date (2019-01-25), Requester (Matthew Berry), and Department (dropdown). There are also text areas for Description and Notes, and a Save button at the bottom right.

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.**

The dialog box has a title "Add Comment" and a close button. It contains a text area with the placeholder "Test comment" and a blue border. At the bottom are "OK" and "Cancel" buttons.

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

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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 Document ×

Document

testDoc1.docx

Browse




Description

Test document

OK

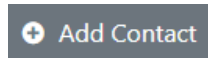
Cancel

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

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

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.

A modal window titled "Add Contact" with a close button (X) in the top right. It contains a "Name" label and a dropdown menu with "select..." as the placeholder. To the right of the dropdown is a plus (+) icon. At the bottom are "OK" and "Cancel" buttons.

Add Contact

Name select...

OK 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.

A modal window titled "New Contact" with a close button (X) in the top right. It contains five input fields: "First Name" (Jim), "Last Name" (John), "Company" (ECO), "E-mail" (jj@eco.com), and "Phone" (4101112222). The "Phone" field is highlighted with a blue border. At the bottom are "OK" and "Cancel" buttons.

New Contact

First Name Jim

Last Name John

Company ECO

E-mail jj@eco.com

Phone 4101112222

OK Cancel

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- 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		

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.

 **Add Contract**


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

New Contract ×

Contract #

OK **Cancel**

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

Contracts	
123456	

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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.

A modal window titled "Add URL Link" with a close button (X) in the top right corner. It contains two text input fields: "URL Link" with the value "www.google.com" and "Description" with the value "Search Engine". At the bottom right are "OK" and "Cancel" buttons.

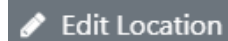
Add URL Link		X
URL Link	<input type="text" value="www.google.com"/>	
Description	<input type="text" value="Search Engine"/>	
		OK Cancel

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

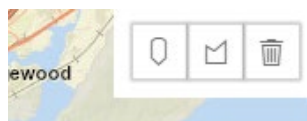
URL Links	Description		
www.google.com	Search Engine		

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 is displayed.



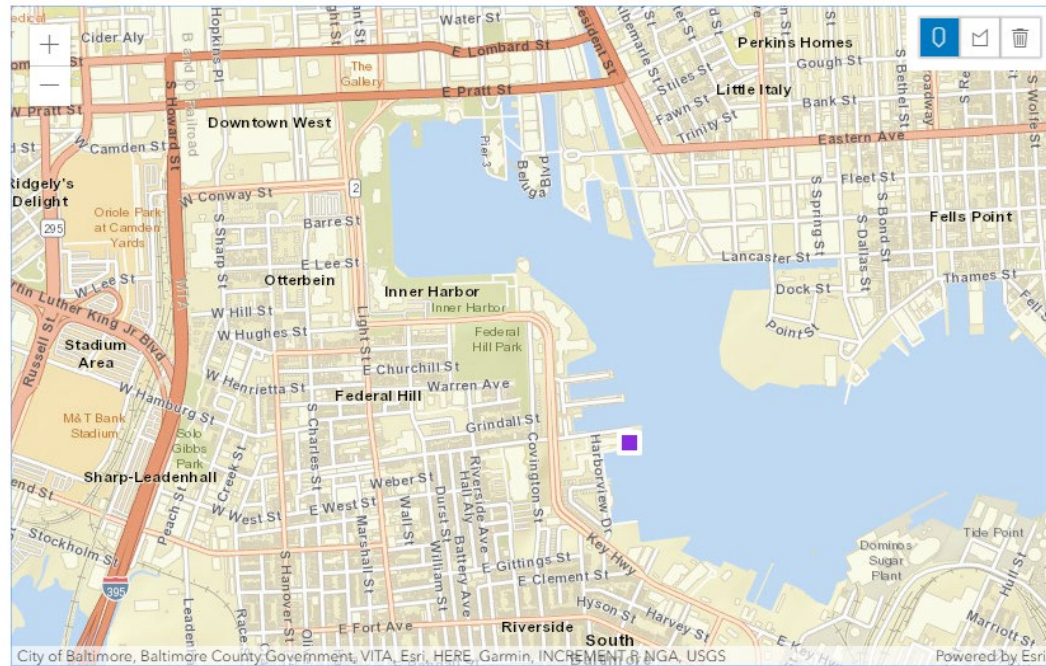
From here, the user can click the Pin or Polygon Shape to either drop a point or polygon to mark the requests spatial locations on the map.



- 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.

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Edit Location



OK Cancel

- 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**.



Submit for Review – 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.

Close – 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 () 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.

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 Unlock for Editing

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

Note: If any 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.

Edit Request Confirmation ×

Any fields resubmitted for editing will reset the request's due-date.

Note: An Email will be sent to the **Requester** or **Reviewer** when a new Request has been **Submitted**, an existing **request has been unlocked for editing**, or a **new comment was added**.