

New “Other Project” Type

With this ETRACS July 2016 release, there is a new, third option for uniquely numbering projects. The two project types that already exist (TIP and WBS) remain unchanged.

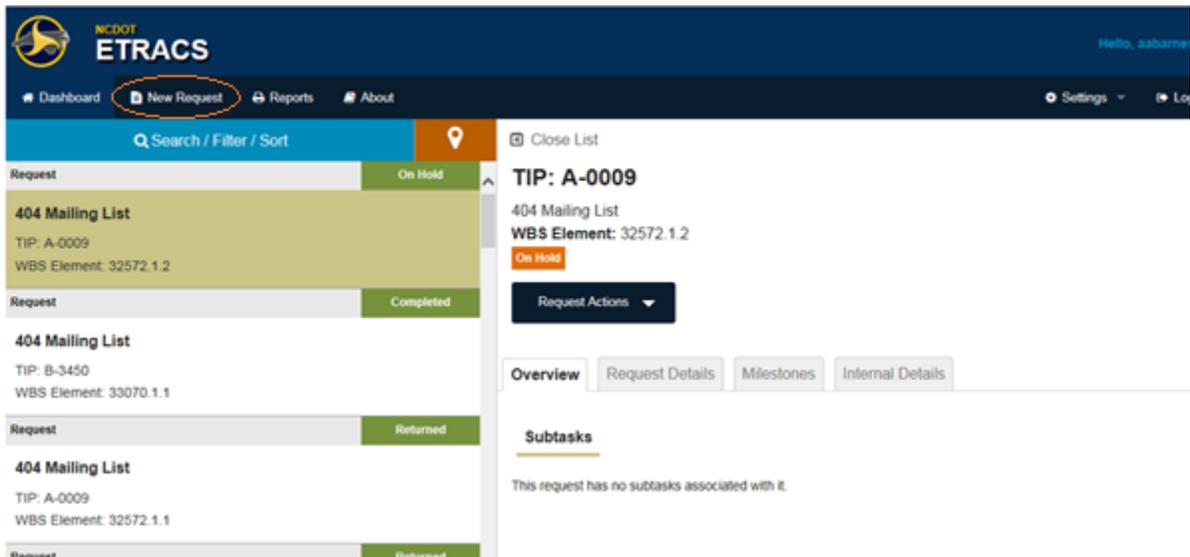
A third project type has been added for: a) projects that share a WBS or b) projects without a TIP or WBS number. Examples of projects that are organized under a single WBS are bridge projects, preliminary engineering projects, Division maintenance, spot safety, bridge, rail. Examples of projects that do not have a TIP or WBS are commerce, or municipal projects.

User Tip: If you create an “Other” type project, there will be no STaRS information. You will have to populate all the data yourself.

Creating the project from the dashboard

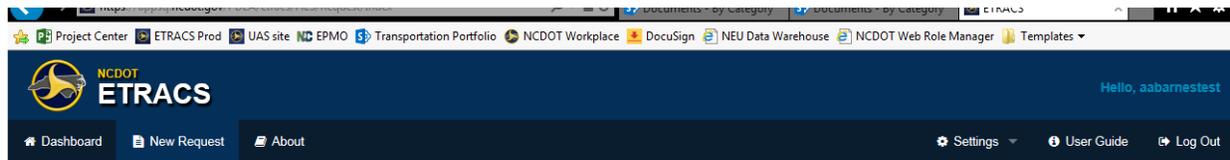
This new project type is created the same way from the dashboard.

1. Click 'New Request' from the application top navigation bar.



The screenshot shows the ETRACS dashboard interface. At the top, the navigation bar includes 'Dashboard', 'New Request' (highlighted with a red circle), 'Reports', and 'About'. Below the navigation bar is a search and filter section. The main content area is divided into two columns. The left column displays a list of requests, each with a status indicator (On Hold, Completed, or Returned). The right column shows the details for a selected request, 'TIP: A-0009', which is a '404 Mailing List' with a 'WBS Element: 32572.1.2' and a status of 'On Hold'. Below the details, there are tabs for 'Overview', 'Request Details', 'Milestones', and 'Internal Details', and a section for 'Subtasks' which states 'This request has no subtasks associated with it.'

The screen appears for you to search and retrieve the project information:



Create Request: Search and Retrieve Project Information

Select your project type:

- TIP Project
- WBS Project
- Other Project 

Enter TIP #

WBS Element(s) 

 Verify

Project Description:

 Continue

2. Select Other Project.



Create Request: Search and Retrieve Project Information

Select your project type:

- TIP Project
- WBS Project
- Other Project 

Enter Shared WBS/Descriptor

 Verify

Project Description:

WESTERN LOOP. PROJECT COMBINED WITH R-2413A, R-2413B FOR LET DESIGN BUILD LET

 Continue

User Tip: there is a tooltip to explain the project type(s) that require this new option. Look for the **?**.

WARNING: Be very careful to use this option **only** in cases where your project requires it (because it shares a WBS or doesn't have a TIP or WBS). This option **does not** get information from STaRS nor send milestone completion dates back to STaRS. Do not use the option for "Other Project" when there is a correct TIP/WBS to "drill down to" in STaRS.

3. Enter the shared WBS or some other descriptor.

The screenshot shows the ETRACS web interface. At the top, there is a navigation bar with the ETRACS logo, the text 'NCDOT ETRACS', and a user greeting 'Hello, j3barnestest'. Below the navigation bar are links for 'Dashboard', 'New Request', and 'About'. On the right side of the navigation bar are links for 'Settings', 'User Guide', and 'Log Out'. The main heading is 'Create Request: Search and Retrieve Project Information'. Under 'Select your project type:', there are three radio buttons: 'TIP Project', 'WBS Project', and 'Other Project' (which is selected). Below this is a text input field labeled 'Enter Shared WBS/Descriptor' containing the text '17BP.6.R.77'. A blue 'Verify' button is located below the input field. To the right, under 'Project Description:', the text reads 'WESTERN LOOP. PROJECT COMBINED WITH R-2413A, R-2413B FOR LET DESIGN BUILD LET'. A grey 'Continue' button is located below the project description.

4. Click Verify. The Continue button is enabled.

This screenshot is identical to the previous one, but with two orange circles highlighting the 'Verify' button and the 'Continue' button. The 'Verify' button is now highlighted in blue, and the 'Continue' button is also highlighted in blue, indicating that it has become enabled after clicking 'Verify'.

Completing Project Information

The Project Information tabs appear.

5. Note the project number at the top of the screen. It will contain the original shared WBS, plus [ET] as an indicator that ETRACS is going to assign a special (non-SAP) project number.

ETRACS Hello, asbarnestest

Dashboard New Request About Settings User Guide Log Out

Project information TIP: N/A | Sub-TIP: N/A | WBS: 17BP.6.R.77[ET]

Please enter required fields on General and Design Information tabs.

General Info Milestones Staff Design Information View on Map

TIP number : N/A
Sub-TIP number : N/A
WBS Element : 17BP.6.R.77

This field is required.
Project Description *

Additional project/bridge description

Division(s) *
Select ▼

County(ies) *
Select ▼

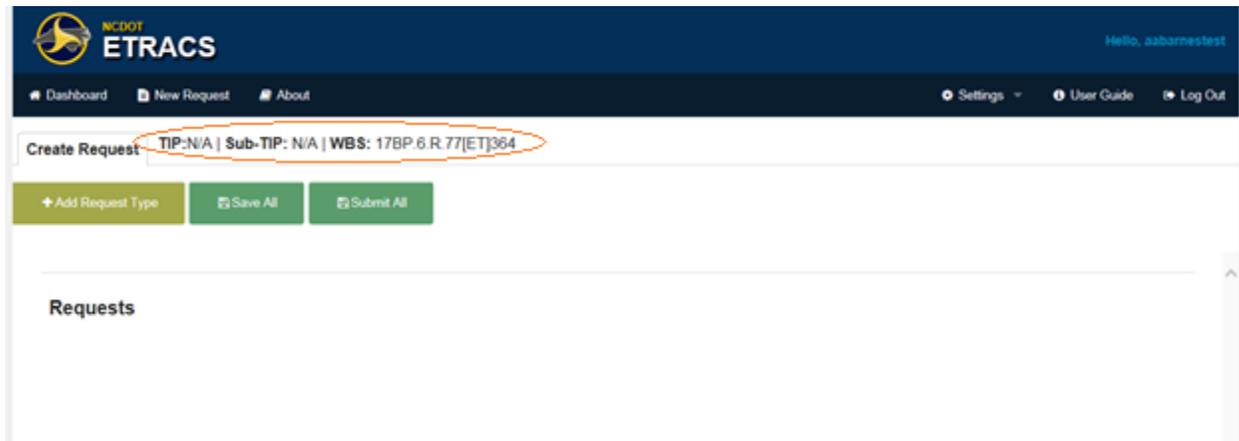
Region(s) *

Funding *
 Federal State

Route

Create Request >

6. Enter the information that is required. The **only** difference in this project type is the Project Description field, which is open for you to name your project yourself.
7. When all the information is correct, press Create Request. The Create Request screen will appear.
8. NOTE that ETRACS has now assigned a unique (non-SAP) project number to your project. From this point, everything functions in the same way (that is, no change for this project type) for creating, assigning, accepting, and completing a request.



Dashboard

The dashboard will include these projects, and their associated requests, in the same way as the other projects. The only differences you may note are: naming the projects, filtering, and searching for these projects. See the next sections for information.

Naming these projects

Because these projects share a WBS, you should use the Project Description of the project to clearly tell them apart. For example, in the screenshot below, five projects were opened under WBS 17BP.6.R.77.

Note how two of the names include the County name so that the other ETRACS users can easily see “which Bridge 3” they need to look at. Consider this when you are naming your projects.

The screenshot shows the ETRACS dashboard with a list of projects on the left and a detailed view of a project on the right. The project list includes:

- Bridge 3 - Duplin County (with a red arrow pointing to the name)
- Bridge 4 (with a red arrow pointing to the name)
- Bridge 3 - Onslow County (with a red arrow pointing to the name)
- Bridge 1 (with a red arrow pointing to the name)
- Bridge 2 (with a red arrow pointing to the name)

The detailed view on the right shows the project description: "Bridge 3 - Duplin County" and "WBS Element: 17BP.6.R.77[ET]350". It also includes tabs for Overview, General Info, Milestones, Staff, and Design Information, and a section for Requests and Subtasks.

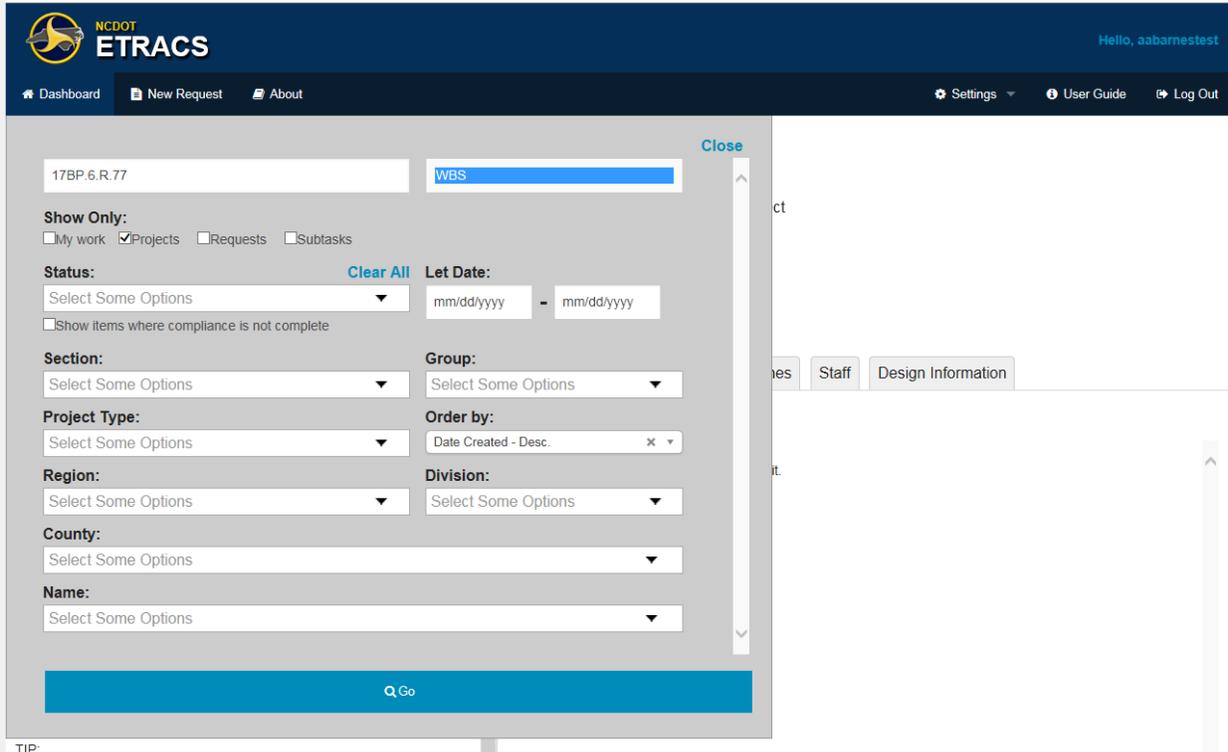
Filter for these projects

From the Dashboard, if you want to filter for these projects, you will note that “Other” has been added to the Project Type filter option.

The screenshot shows the ETRACS filter panel with various dropdown menus and checkboxes. The "Project Type" dropdown menu is highlighted with a red circle, and the "Other" option is selected. Other options in the dropdown include "Tip" and "WBS". The filter panel also includes fields for Status, Section, Group, Order by, Division, County, and Name, along with a "Q Go" button at the bottom.

Search for these projects

If you want to view only the projects that have been created under a specific shared WBS, you can use the Search option at the top of the Search/Filter/Sort menu by entering the “parent” WBS in the search field. For example, to find all the projects under WBS 17BP.6.R.77, enter that WBS into the Search field and select WBS as the search option.



TIP:
You will see all the projects created under that WBS.

