

Projects do not exist in ETRACS until the first person makes a request associated with them.

Here's how to create a new project in ETRACS so that you can then make requests associated with it:

The screenshot shows the ETRACS dashboard. The top navigation bar includes links for Dashboard, New Request (highlighted with a red circle), About, Reports, and NEU. Below the navigation bar, there's a search bar and a list of projects. The first project is 'US 74 SHELBY BYPASS FROM EAST OF NC 150 TO EXISTI ...' with a status of 'Assigned'. The second project is 'I-85 FROM US 321 TO NC 273; WIDEN TO EIGHT LANES ...' with a status of 'Requested'. The sidebar on the right contains tabs for Overview, General Info, Milestones, Staff, and Project Notes. The 'Overview' tab is active, showing a list of requests for the selected project.

1. Click "New Request"

2. Select Project Type

If you select a TIP or WBS Project, this will pull in the relevant project info from SAP to get you started.

The screenshot shows the 'Create Request: Search and Retrieve Project Information' form. The 'Select your project type:' section has three radio buttons: TIP Project, WBS Project, and Other Project (selected). Below this is a text field for 'Enter Shared WBS/Descriptor' with the value 'GUARDRAIL ON SR 1234'. A 'Verify' button is at the bottom left.

Selecting an "Other" type project will allow you to create a project not tied to SAP data.

This is for projects that share a WBS (such as Division maintenance, SPOT safety, rail, etc) or ones not in SAP at all (other actions, municipal projects, etc).

If you select "Other" enter the shared WBS or a short project description.

Project Description:

→ Continue

3. Click Verify

4. If you are creating a TIP or WBS type project, the project description will appear here. If Other, it will remain blank.

Click Continue

5. Make sure every required field (marked with a red asterisk) on this page is completed. If a TIP or WBS project, a lot of this info will be pulled in from SAP.

Project Information **TIP:** N/A | **Sub-TIP:** N/A | **WBS:** Guardrail on SR 1234[ET]

Please complete all required fields on the General Info tab.

General Info Milestones Staff Project Notes

TIP: N/A | **Sub-TIP:** N/A | **WBS:** Guardrail on SR 1234

Project Description*

Construction Let Date

mm/dd/yyyy

Requesting Unit*

Select Requesting Unit ▼

Additional project/bridge description

Division(s) *

Select ▼

County(ies)*

Select ▼

Region(s)*

Funding*

☐ Federal ☒ State

FA project number

Route

Existing Bridge – year built

[Create Request >](#)

6. Once all required/available info is entered, click "Create Request" at the bottom of the screen.

Now the project has been created and you can begin to create a request as usual.

Create Request **TIP:**N/A | **Sub-TIP:** N/A | **WBS:** Guardrail on SR 1234[ET]3992

[+ Add Request Type](#)

 Save All

7. Click Add Request Type

Requests

8. Select the appropriate group(s) you are making requests of.

ETRACS
Environmental Tracking and Coordination System

Dashboard New Request About Reports NEU

Create Request TIP:N/A | Sub-TIP: N/A | WBS: Guardrail on SR 1234[ET]3992

Select one or more groups.

To delete a group, click the "x" next to the group name (NOTE: To remove a group, you must remove all the request types from that group if any are selected).

Human Environment
Historic Architecture
Archaeology
Community Studies
Public Involvement
Natural Environment
Biological Surveys
ECAP
ICI/On-Site Mitigation
Environmental Policy

Environmental Policy

Document Review

Close Request Types Save All Submit All

Requests

9. Within the EAU group(s) you selected, add whatever request type(s) you need from the appropriate dropdown section(s) below.

10. Enter a due date and any notes you want to convey.

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Create Request TIP:N/A | Sub-TIP: N/A | WBS: Guardrail on SR 1234[ET]3992

Select one or more groups.

To delete a group, click the "x" next to the group name (NOTE: To remove a group, you must remove all the request types from that group if any are selected).

Historic Architecture Archaeology

Select your request types.

To delete a work request, click the "x" next to the work request type.

Human Environment

[HA] Cultural Resources Screening [A] Cultural Resources Screening

Natural Environment

Environmental Policy

Document Review

Close Request Types Save All Submit All

Requests

Historic Architecture - [HA] Cultural Resources Screening

Request Details Milestones Documents

Due Date *

Please allow lead time of: 30 Days

Notes

Archaeology - [A] Cultural Resources Screening

Documents

11. Click the documents tab and ensure links to all required documents (that are marked with a red asterisk) and any other documentation you want to provide are included.

* NOTE - it's best to make sure all required documents (maps, docs to review, etc) are already on SharePoint before you make the request as this screen will time out after 20-30 minutes and you will lose any unsaved progress. You can always save the request if you're not yet ready to submit and come back to the draft request to submit later.

12. Once all required info is provided, click Submit.

IMPORTANT - One final step is needed to actually send the request:

Request Notification

Send request notifications

Your Request will be sent to the following people:

Erin Cheely, Mary Furr, Matt Wilkerson

For your convenience, you may forward the email, along with any extra document(s) you have attached, to anyone in DOT's email system, as well as from your personal Outlook contact list.

The subject line of the email address
TIP: N/A | Sub-TIP: N/A | WBS: Guardrail on SR 1234[ET]3992 : A request has been made in ETRACS for this project.

You can also enter your own message which will be included in the notification.

Attach any additional documents you would like here.
Attached files are not stored in the ETRACS system.

Send Notification **Cancel**

Notification preview:

TIP: N/A
WBS: Guardrail on SR 1234[ET]3992
County: Carteret

From: Erin Cheely
SUBJECT: TIP: N/A | Sub-TIP: N/A | WBS: Guardrail on SR 1234[ET]3992 : A request has been made in ETRACS for this project.

Your Assistance is requested in providing environmental input for the project described below. Information concerning the proposed project is provided to assist your staff in their investigations. If you are unable to meet the schedule below, please let me know.

Request Type: [HA] Cultural Resources Screening

13. Click Send Notification

You should receive an automated email confirmation that the request was submitted after you click this. If you do not receive an email, your request may not have been submitted.

*** Note for consultants/external requestors** - If the email address associated with your NCID changes (ex. you change firms), ETRACS does not automatically update your address. Make sure your new email address is updated in NCID and send ETRACShelp@ncdot.gov an email and we'll re-sync your user role with NCID to update your address to ensure you receive all ETRACS notification as appropriate.

Additional questions: contact ETRACShelp@ncdot.gov