

TRACK

QUICK REVIEW



QUICK REVIEW OF TRACK

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ACTIVITY SCREEN

ACTIVITY > LABOR HOURS > LABOR ACTIVITY

1. Track will default to today's date. You will always be working in Track a day behind, so change the date to the previous work date.
2. Check the In/Out column for employees showing a status of **Schedule** by using the filter feature:

Example:

Labor Hours

Organization: Excel Modular Scaffold Group: All Groups

From: 1/31/2017 To: 1/31/2017

Active Inactive Both

Labor Listing

Drag a column header and drop it here to group by that column

Refresh

Page size: 250 2 items in 1 pages

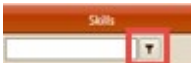
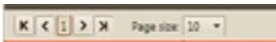
	Resources	In/Out	Skills	Scheduled	On-Site	Net Time
		schedule				
	Lara, Jean C	SCHEDULE		0.00	6.75	0.00
	Noto, Maria C	SCHEDULE		0.00	2.80	0.00

3. Rehires will not have a **SCHEDULE** status but will show the skill and schedule previously assigned. Quickly communicate with your hiring center to submit a schedule or skill change if needed to your Track Admin, before you begin processing time for those resources.

Note: Rehires with an increase in scheduled hours or skill rate require a signed skill change request (submitted on the PRF) if they have been onsite within the past year. If there is no change in current employee assignments, or if the changes are decreases, the PRF is not needed.

4. Familiarize yourself with the meaning of resource statuses in the In/Out column. Refer to document titled "Track Exceptions on the Activity Screen" (Exception, Schedule, In, Out, OVR, OVR (I), OVR (O), etc.)

NOTE:

- The use of filters  in all columns is a handy tool to use narrowing search results.
- Remember to change pages and page size  to view all the details, when applicable.

IMPORTANT ITEMS ON ACTIVITY PAGE

Labor Hours

Organization: Group:

From: To:

[Edit Resource](#)
[In/Out](#)
[Calc Net](#)
[Details](#)
[Show/Hide](#)
[IN/OUT Correction](#)

[Labor Details](#)
[Individual Schedule](#)
[Skill Assignment](#)
[Allocations](#)
[Request Override](#)

☒ Active
 ☐ Inactive
 ☐ Both

In/Out function

- Provides the Lenel scan date detail for only the individual selected.

Calc Net function

- Recalculates the selected employee's Net Time by running the business rules of their Pay Formula, Schedule, and On Site time.
- Check the box by the resource name, click Calc Net then Proceed
- Able to Calc Net multiple resources by checking multiple boxes then Calc net and Proceed
- Also able to "Calculate for All Resources listed" for all resources displayed on the page. Remember that there may be more than one page and if so, you must Calc Net for all resources on EACH page.
- To Calc Net for resource(s) on multiple dates, enter the date From and To date range, check the resource boxes then Calc Net and proceed. Review changes by expanding the selection; click the > icon to the left side of resource name:

Organization: Group:

From: To:

[Edit Resource](#)
[In/Out](#)
[Calc Net](#)
[Details](#)
[Show/Hide](#)
[IN/OUT Correction](#)

[Labor Details](#)
[Individual Schedule](#)
[Skill Assignment](#)
[Allocations](#)
[Request Override](#)

☐ Calculate for All Resources Listed
 ☐ Show Details of Calculations
 [Proceed](#)
[Cancel](#)

Note: You can get a more detailed calculation break down by checking "show details of calculations and proceed" when checked on an individual resource

Details

Shows a quick view of how Track calculated the employee's Net Time:

Pay Computation Detail

Schedule Name: GBR 0600-1630 M-Su LD

Cumulative Hours: 19.90

Cycle Cumulative Hours: 10.00

1/31/2017

Pay Detail for Aceves, Javier

Drag a column header and drop it here to group by that column

Refresh

Page size: 10

3 items in 1 pages

Net Time Type	Override Reason	Hours/Extra Charges	Paid	Calculated	Override	Modified By
EARLY TIME NOT PAID		Hours	N	0.02	0.00	
STRAIGHT	Dock Work	Hours	Y	4.60	9.90	jjohnston1 - 2/1/2017
TRANSIT TIME		Hours	N	1.00	0.00	

Show/Hide

Works like a toggle; if selected, this feature will display the resources without gate activity for the day displayed. Track always defaults to view 'Active' resources but the option to also view 'Inactive' resources or 'Both' is available.

Note: Never calc net all resources while show/hide is open because all the inactive resources will get displayed on the Labor Hours screen for that day.

Welcome jjohnston1 | Reporting | Resources | Schedule | Activity | Allocations | Estimating | Invoices | Settings | Theme: Sunset | Location: Galveston Bay Refinery

Labor Hours

Organization: Excel Modular Scaffold | Group: All Groups | [Edit Resource](#) | [In/Out](#) | [Calc Net](#) | [Details](#) | [Show/Hide](#) | [In/OUT Correction](#)
[Labor Details](#) | [Individual Schedule](#) | [Skill Assignment](#) | [Allocations](#) | [Request Override](#)

From: 1/23/2017 | To: 1/29/2017 | ☒ Active ☐ Inactive ☐ Both

Labor Listing

Drag a column header and drop it here to group by that column

Refresh | 2093 items in 9 pages

Page size: 250

	Resources	In/Out	Skills	Scheduled	On-Site	Net Time
>	Aburto, Andres		Safety Supv A	No Current Activity		
>	Acevedo, Joshua J		Scaffold - B	No Current Activity		
>	Aceves, Javier		Scaffold - A	60.00	30.97	59.90

Labor Details

This screen shows the full resource details in one place: employee gate activity, pay formula, schedule, skill, status, on-site time, net time, cumulative hours and cumulative ST hours (all ST hrs for the week not including today) cycle cumulative hrs (total cumulative hours for cycle/week not including today)

Labor Details

Organization: Excel Modular Scaffold | Group: All Groups | Resource: Aceves, Javier | Date: 1/23/2017 | [Allocations](#)

Pay Detail

On-Site: 9.13 hrs | Status: OVR(D) | Schd. Name: GBR 0600-1630 M-Fu LD | Formula: GBR Excel Scaffold | Agreement: MSBR13801 | Skill: Scaffold - A | Net Hrs: 9.90 | Cum. Hrs: 9.90 | Cum.ST.Hrs: 0.00 | Cycle Cum. Hrs: 0.00 | Extr: \$0.00

Hour Entry Form

Hour Type: | Override Reason: | Date: 1/23/2017 | Hours: | [Submit](#) [Cancel](#)

Expense Entry Form

Agreement: MSBR13801 | Expense Type: PER DIEM | Expense Reason: | Date: 1/23/2017 | Amount: | [Submit](#) [Cancel](#)

	Net Time Type	Override Reason	Paid	Calc'd	Over	Modified By
✎	STRAIGHT	Dock Work	Y	9.30	9.90	jjohnston1 - 1/24/2017
✎	LUNCH DEDUCTION		N	0.50	0.00	
✎	TRANSIT TIME		N	0.07	0.00	

3 items in 1 pages

IN/OUTs Details

IN: 00:00:00 | Yesterday | Today | Tomorrow | OUT: 00:00:00 | Yesterday | Today | Tomorrow | [Submit](#) | [IN/OUT Correction](#)

	Direction	Date	Time	Location	Ts Date	-1 Day	+1 Day	Last Modified By	Date Modified
✎	In	1/23/2017	05:55:00	553505 Gate42 Turnstile	1/23/2017	<< Move	Move >>		2/1/2017
✎	Out	1/23/2017	05:55:14	553509 Gate42 Turnstile	1/23/2017	<< Move	Move >>		2/1/2017
✎	In	1/23/2017	06:18:48	563701 Dock Trailer Cor	1/23/2017	<< Move	Move >>		2/1/2017
✎	Out	1/23/2017	06:18:49	Manual	1/23/2017	<< Move	Move >>	jjohnston1	1/24/2017
✎	In	1/23/2017	06:50:51	559202 DOCK 31/32 IN	1/23/2017	<< Move	Move >>		2/1/2017
✎	Out	1/23/2017	15:58:18	559201 DOCK 31/32 OU	1/23/2017	<< Move	Move >>		2/1/2017
✎	In	1/23/2017	16:25:19	553504 Gate42 Turnstile	1/23/2017	<< Move	Move >>		2/1/2017
✎	Out	1/23/2017	16:25:41	553509 Gate42 Turnstile	1/23/2017	<< Move	Move >>		2/1/2017

Example of smart rounding:

Contract Terms & Conditions for Calculating Net Billable Hours

Examples of rounding UP DOWN or SMARTLY:

- * You have a 15 minute rounding rule in place
- * Vendor employee is on a 07:00am – 17:30pm schedule.
- * The employee clocks in at 07:02am and out at 17:30pm.

Time on site would = 9.97 hours (10.5 scheduled hours - .5 lunch - .03 late in)

UP: 9.97 hours will round up to 10 net billable hours

DOWN: 9.97 hours will round down to 9.75 net billable hours

SMARTLY: 9.97 hours will round up to 10 net billable hours/splitting the difference. If the net billable time would've been <= 9.92 it would round down to 9.75 net billable hours. If using this option there will be times when you are giving time back and times when you will be taking time away.

Hints for Achieving Correct Net Hours

- › Correct Pay formula must be assigned at Organization, Group or Resource level
- › Resource must have a contract and skill assignment
- › Resource must have a schedule

NOTE: If any change is made to pay formula, schedule, skill, contract, or group, **after** hours have been calculated automatically or manually, then the resource must have their time recalculated to incorporate the changes.

If the pay formula is calculating **cumulative** hours for the week, anytime there is a change to time during the week that has already been calculated (i.e., an override, exception resolution, etc.), all days **following** the override must be recalculated as well to keep the cumulative hours correct.

- › To recalculate hours for one person, select resource, click CalcNet, then click Proceed.
- › To recalculate specific multiple resources, click in the check box to the left of each name. Click CalcNet and then click Proceed.
- › To recalculate all resources listed on the screen, click CalcNet. Select the first option to Calculate for All Resources Listed then click Proceed. All the resources listed on the screen will be recalculated. (Do not use this function when the Show/Hide option has been used and resources with no activity are being displayed. This will make it appear these people were on-site even though the on-site time will be 0.00 and the net time will be 0.00.)

Note: The daily activity report also provides details to help determine why a resource may not have the expected Net billable hours:

ate | 1 / 26 | 91.9% | Tools | Sign

Daily Activity

Date: 01/31/17

Name	PID	Skill Type	-----Clock Time-----		-----Schedule-----		Time On Site	Net Time	Flag
			In Time	Out Time	Start Time	End Time			
Excel Modular Scaffold									
<None>									
Lara, Jean C	12815	Scaffold - C	1545	2230	0700	1730	6.75	1.80	Late
Total in Group:								1	
INDIRECTS									
Deleon, Abraham	410	Prjct - Supt	0518	1758	0530	1830	10.67	12.00	Early
Graves, John M	447	Prjct Mgr	0542	1803	0530	1830	10.93	11.70	Late
Rogero, Cesar	7443	Insulator Supt	0702	1756	0600	1900	10.48	10.40	Late
Total in Group:								3	
INDIRECTS MAINT									

Request Override

- Overrides are submitted to adjust a resource's hourly calculation.
- Check one or multiple resources and then click Request Override

Welcome | jjohnston1 | Reporting | Resources | Schedule | Activity | Allocations | Estimating | Invoices | Settings | Theme: Sunset | Location: Galveston Bay Refinery

Labor Hours

Organization: Excel Modular Scaffold | Group: All Groups | Edit Resource | In/Out | Calc Net | Details | Show/Hide | TN/OUT Correction | Labor Details | Individual Schedule | Skill Assignment | Allocations | Request Override

From: 1/31/2017 | To: 1/31/2017 | Active | Inactive | Both | Request Override for selected resources

Labor Listing

Drag a column header and drop it here to group by that column

Can click here for all resources if needed or just click the ones you want to do override on. Can also filter by group.

Resources	Scheduled	On-Site	Net Time
<input checked="" type="checkbox"/> Aceves, Javier OVR(O) Scaffold - A	10.00	3.60	9.90
<input checked="" type="checkbox"/> Acuna-Deleon, Juan OUT Pntr - B	10.00	10.63	10.00
<input checked="" type="checkbox"/> Adame, Javier G OVR(O) Instr Fore A	10.00	11.05	10.50

619 items in 3 pages

Note: Use the Daily Activity report to check for Early and/or Late time may determine if a Temp Schedule override is needed.

Override Hours

Organization: Excel Modular Scaffold | Filter Overrides: Show Requested | From: | To: | View Overrides | Process Overrides | History | Labor Details

Handler: All Handlers | Override Reason: All Override Reasons

Override Listing

Drag a column header and drop it here to group by that column

All the highlighted areas needs filled out before clicking process override. Be detailed in comment section and follow the hand out for example to what reason to use.

Resource	ST Hrs	ST Ext	ST Tot	OT Hrs	OT Ext	OT Tot	DT Hrs	DT Ext	DT Tot	R4 Hrs	R4 Ext	R4 Tot	R5 Hrs	R5 Ext	R5 Tot	R6 Hrs	R6 Ext	R6 Tot	Override Reason	Commer	Date TS	Exception Handler
<input checked="" type="checkbox"/> Aceves, Javier	9.90	10	10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Temp	detail	1/31/2017	jjohnston

2 items in 1 pages

- Remember to use the most reasonable choice for the Override Reason (Holdover, Off-site, Drug Screen, etc)
- In the comments field, enter important details to substantiate the Override reason and include the name of the MPC rep which requested/approved employee Holdover, Early In, etc.
- You can now also attach documents to your overrides. For example, if a holdover override is needed, you can attach the signed OT Request form to your OVR submission. This document will then be available to the Track Admin and Approver for viewing. Check the box next to the name of the resource(s) that you would like the form to be attached to and then click “Add Attachment”, select the desired file from your computer and click Upload to save.

Track THIS IS PRODUCTION

Home Reporting Resources Schedule Activity Allocations Estimating Invoices Settings Theme: Sunset Location: Galveston Bay Refinery

Override Hours

Organization: Excel Modular Scaffold Filter Overrides: Show Requested From: To: View Overrides Add Attachment Process Overrides History Labor Details

Handler: All Handlers Override Reason: All Override Reasons

Override Listing

Organizations

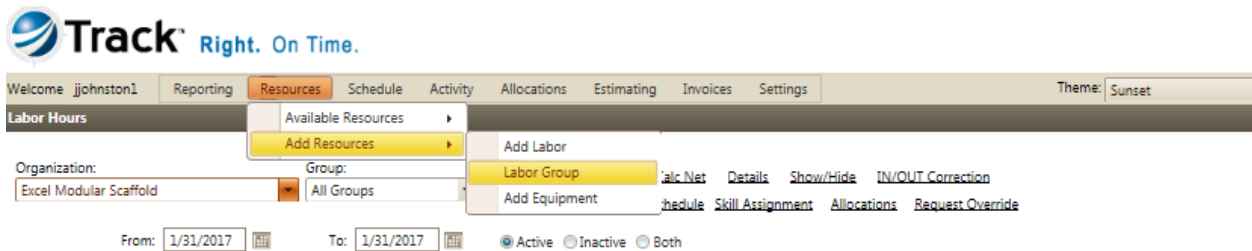
Override Reason: Date TS: Restore defaults Refresh 2 items in 1 pag

Resource	ST Hrs	ST Ext	ST Tot	OT Hrs	OT Ext	OT Tot	DT Hrs	DT Ext	DT Tot	RA Hrs	RA Ext	RA Tot	RS Hrs	RS Ext	RS Tot	RB Hrs	RB Ext	RB Tot	Override Reason	Comments	Date TS	Exception Handler
Cruces Saul	10.00	0.00	10.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Select Override Reason		11/17/2020	Select Handler
Cruces Cruz, Rolando	10.00	0.00	10.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Select Override Reason		11/17/2020	Select Handler

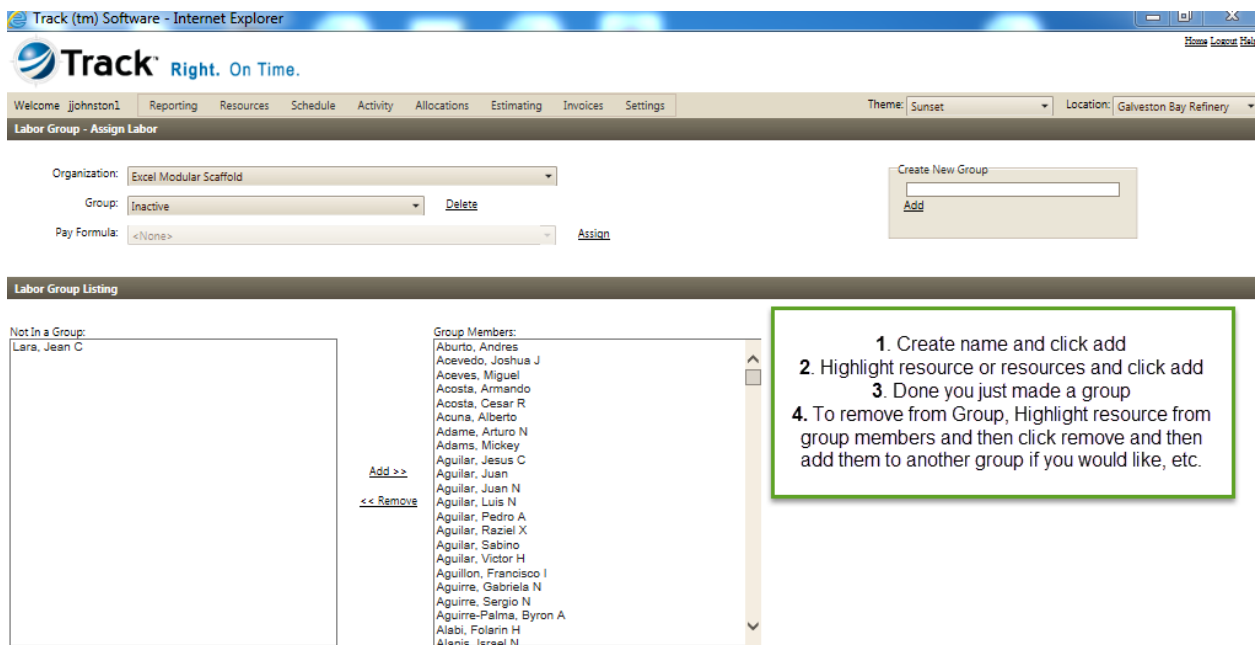
SETTING UP LABOR GROUPS

RESOURCES > ADD RESOURCES > LABOR GROUP

- This feature is useful to group resources together for easier review of net time, allocation, reporting, etc. Labor Groups can be set up for any common category. Example group names: *Nightshift, Days, TAR, Projects, Indirects, Directs, Paint, Scaffold, John's Crew, etc.*



- How to create Labor Groups:



ADDING A PERSONNEL IDENTIFIER (PID)

ACTIVITY > LABOR HOURS > LABOR ACTIVITY

- This feature is useful to add a company's Unique Employee Identifier (employee number) to the resources in Track.
- In the Labor Activity screen, select a resource then click the Edit Resource button:

Organization: Excel Modular Scaffold Group: INDIRECTS

From: 1/31/2017 To: 1/31/2017

Buttons: Edit Resource, In/Out, Calc Net, Details, Show/Hide, IN/OUT Correction, Labor Details, Individual Schedule, Skill Assignment, Allocations, Request Override

Active ☒ Inactive ☐ Both ☐

1. ✓ box by resource and click name
2. click edit resource

Labor Listing

Drag a column header and drop it here to group by that column

Refresh

Page size: 250 3 items in 1 pages

	Resources	In/Out	Skills	Scheduled	On-Site	Net Time
<input checked="" type="checkbox"/>	Deleon, Abraham	EOV(O)	Pjct - Supt	12.50	10.67	10.40
<input type="checkbox"/>	Graves, John M	OUT	Pjct Mgr	12.50	10.93	11.20
<input type="checkbox"/>	Rogero, Cesar	EOV(O)	Insulator Supt	12.50	10.48	10.40

- In the Labor Information screen, enter the unique ID in the PID field, then click Save:

Organization: Excel Modular Scaffold Group: INDIRECTS

Last Name: Graves First Name: John MI: M

Labor ID: 001-10118 SSN: External Reference: 001-10118

Modify Labor ID ☐ PID: 447 Contractor ID:

Active ☒ Is Runner ☐ Is Employee ☐ Has Default Assignment ☐ <None>

Agreement: MSBR13801 Skill: <None> Assign Agreement & Skill Schedule Assignment

Pay Formula: <None> Pay Formula Assignment

Labor Type for Prorations:
☐ Salaried ☐ Salaried Non-Exempt ☐ Wage ☒ None

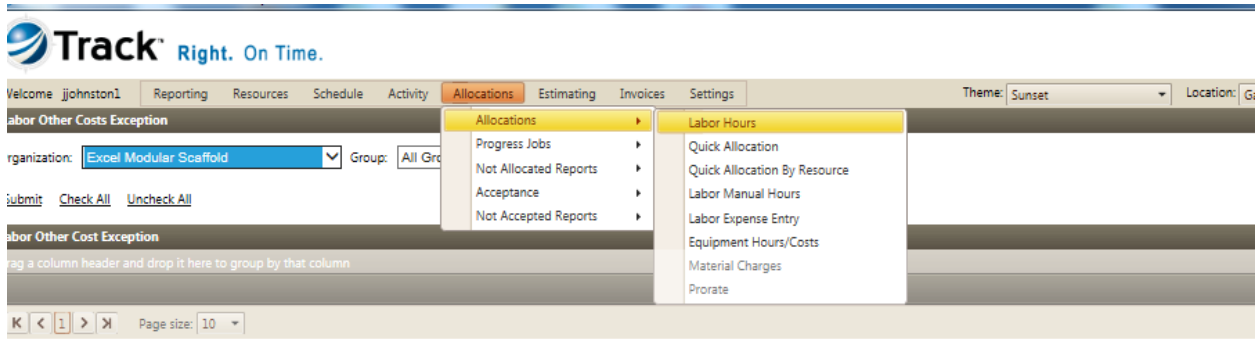
Last Modified by TRACK ACS WEB SERVICE on 2/1/2017 4:45:31 PM

2 Save Reset Delete New

ALLOCATING LABOR

ALLOCATIONS > ALLOCATIONS > LABOR HOUR

There are many different ways to allocate Labor. Below is how to manually allocate one resource at a time.



- Once the resource's desired Net Time is calculated and available to allocate for the date selected, enter the PO, WO, and Extra field (optional but useful for payment application) then click Submit:

A screenshot of the 'Allocate Labor' form in the Track Right. On Time. software. The form includes fields for 'Organization' (Excel Modular Scaffold), 'Group' (All Groups), 'Date' (1/31/2017), and buttons for 'Select Template', 'Acceptance', 'Labor Details', and 'Accept / Unaccept Allocation'. A table shows 'Resources' with columns for 'Available' and 'Allocated' time. The 'Submit' button is highlighted with a red box and a callout that says 'Never change anything with the default'. The 'Group' dropdown is highlighted with a red box and a callout that says 'Can temp change skill here'. The 'Extra' field is highlighted with a red box and a callout that says 'Can leave blank or input something to help with reconciling payments'.

Resources:	Available:	Allocated:												
	S/T	O/T	D/T	R4	R5	R6	E/C (\$)	S/T	O/T	D/T	R4	R5	R6	E/C (\$)
Aceves, Javier	9.90	0.00	0.00	0.00	0.00	0.00	0.00	9.90	0.00	0.00	0.00	0.00	0.00	0.00
Acuna-Deleon, Juan														
Adame, Javier G														
Aguilar, Jesus A														
Aguillon, Juan M														
Aguirre, Gabriel D														

S/T	\$/hr	S/T Code	O/T	\$/hr	O/T Code	D/T	\$/hr	D/T Code	R4	\$/hr	R5	\$/hr	R6	\$/hr	E/C (\$)	E/C Code
0.00			0.00			0.00			0.00	0.0000	0.00	0.0000	0.00	0.0000	0.00	

Note:

Allow the Area to Default. **Never** edit this field to allow proper approval routing.

The resource's assigned Skill Type will default but the option to update is available for temporary changes **less than one week**.

The Extra field may be useful A/R to reconcile payments received; however, this is an **optional** data field and is not required to be used.

Track allows the Available Hours to be allocated to a single WO or multiple WO#'s. This is done by editing the ST, OT, or DT hour field in the middle section of the screen. Once the first WO# is allocated, the Available Hours remaining to be allocated will be reduced.

Allocations should **ALWAYS** end in a 0 or 5.

NEVER submit a negative allocation to balance the available hours verses allocated hours as a correction. This type of correction can only be done as an Override

Remember to check for **Negatives**.

Example of when negatives happen:

1. Allocate **10** hours but **0** net hours available because wrong schedule and no override was done.
2. Allocated and then asked for override to be deleted before deleting allocation. Have to first delete allocation and then override, otherwise can't get back to allocation to edit or delete, but not allocated report will show negative. Will need to input override just to delete allocation and then delete override....
3. Allocated Per Diem, but then asked for it to be removed will show a negative amount if not first removed from allocation.
4. If calc net is done for the whole week, cumulative hours may change and cause a negative due to not calc netting daily after all overrides processed.

MPC expectations are that allocations need to be done for the previous day by 10am.

USING LABOR ALLOCATION UPLOAD

1. Run M-Allocation Import Form (Excel) – Can only run daily.
2. Review all columns of data and explain what needs to be filled out. [Use the Quick Reference guide page 5 & 6 to do this.](#)
3. You'll notice the PID is here if you filled it out on the edit resource screen
4. If you have someone set up with auto-allocation, their PO and MO will be displayed
5. You can change skill, but it has to be a valid skill assigned to your organization.
6. Add time will default to N. If you put Y, it won't allow you to add time.
7. GBR is not using level 3 or 4. If you use auto allocation it may put something in level 3, otherwise leave blank.
8. If you are doing multiple allocations, you will need to insert rows and copy data and modify hours.
9. IF THERE ARE MULTIPLE ALLOCATION YOU MUST REMOVE TOTAL HOURS BEFORE YOU IMPORT
10. Enter invoice #, etc. in Extra Field
11. Save version, then copy and paste into Track Import Template
 - a. Settings – Utilities – Track Import
 - b. Import Templates – Open – Double click folder – Double click allocation.xls – enable editing – COPY ROW 2 AND DOWN FROM YOUR SPREADSHEET, PASTE SPECIAL VALUES
12. Track will only look at 1st tab and it must say TrackImport
13. Save in a location of your preference – go back to Track
14. Import type =Allocation, Deliminators = excel, ALWAYS CHECK ANALIZE – Browse – locate file – Import.
15. Refresh until you see it processed and you have a log file
16. If log file does not show you proper error, run "import error log" report. You will need your import id.
17. Fix problems – analyze again and one it states it is successful, import again, but this time do not check analyze.
18. Logs listed can be deleted unless the import went in clean. You can't delete, so you can see history.
19. Always check to make sure your allocations are complete by running your non-allocated report or the project management report.

AUTO ALLOCATION

SCHEDULE > VIEW SCHEDULE > LABOR SCHEDULE

The screenshot shows the Track software interface. The top navigation bar includes tabs for Reporting, Resources, Schedule, Activity, Allocations, Estimating, Invoices, and Settings. The 'Schedule' tab is active. Below the navigation bar, there is a 'Daily Scheduled Resources' section. A table lists resources with columns for Resource Name, Skill, and a Gantt chart. A context menu is open over the table, showing options like View Schedules, Build Schedule, Assignment, Labor Schedule, Equipment Schedule, Resources Count, Est'd Labor Cost, and Manpower. On the right, there is an 'Add Auto-Allocation' form with fields for From, To, Order Type, Purchase Order Line Item, Work Order, Extra, Area ID, and GL Account.

- Select group or use all groups
- Select resource or resource's name
- Choose from and to date
- Enter Po#
- Enter WO#
- Extra field if you desire
- **DO NOT** change area Id and GL account
- Assign

Note: You must touch/highlight the resource name on the allocation screen in order for the auto-allocation to populate.

RENTAL EQUIPMENT RECORD (RER)

MPC requires the submittal of Rental Equipment Records (RER) for all contractor company owned equipment billed in Track's Equipment Module.

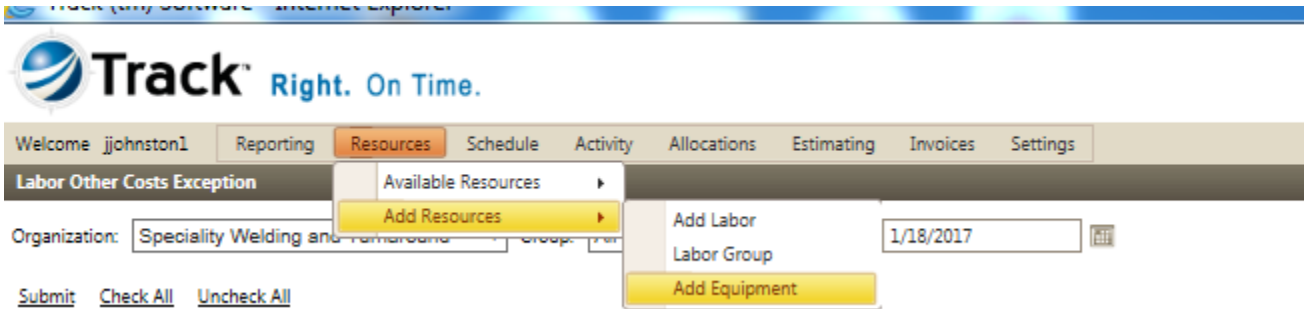
MPC requires the submittal of an RER **and** CSM for third party equipment rentals billed in Track's Material Module. Copies of all required forms can be obtained from your Track Admin.

Sample RER:

Marathon Petroleum Company LP Galveston Bay Refinery		EIN# GBR-JDC-3000
RENTAL EQUIPMENT RECORD (RER)		
(Part 1) Any and all contractor proposed rental equipment to be brought onto Marathon Petroleum Company LP Property must have an approved Rental Equipment Record (RER) form. Part 1 of this form must be completed, reviewed by MPC authorized personnel, and assigned an Equipment Identification Number (EIN) prior to mobilization of the equipment onto site.		
To be completed by Contractor: UNIT: AREA03 Contractor Name: JOHN DOE CONSTRUCTION Contract/JO#: 1Q16 TAR WO#: 124556 Description of Equipment: LAPTOP COMPUTER AND HOTSPOT BOX		Class: A B C Fully Loaded Rates: (incl. markup, tax, etc) Hourly Rate /HR OR Day/Week/Month Rate / \$ 200.00 / Example: \$30/\$90/\$270
<input checked="" type="checkbox"/> Company Owned <input type="checkbox"/> 3 rd Party <input type="checkbox"/> MPC provided Est. Start Date: 02 / 12 / 2015 Est. Stop Date: 12 / 25 / 2015 Notes: ALL PLANNING WILL UPDATE WO/CHARGE NUMBER TO EXECUTION AT START OF TAR		Total Additional Costs: Mob: Demob: Other:
Contractor Authorization: Signature: TAR AREA LEAD: Signature: 		On TAR Plan <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Note: MPC Proj. Control Authorization: Signature: CSM Rate: <input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No \$ 1.45 /HR CCTS Entry: Initial: JD
Fueled By: <input type="checkbox"/> Fuel Truck <input type="checkbox"/> Garage Prokee Issued: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		MPC Fuel Approval: (MPC Project Controls) Signature:
ON-SITE ARRIVAL		
Contractor Mobilization Request: Equip ID: Date In: / / Time In: VIN/Serial Number: 		
Contractor Authorization: Signature: 		MPC Logistics Coordinator: Signature: CCTS MOB Entry Initial:
OFF-SITE AUTHORIZATION		
Contractor De-Mobilization Request: Prokee Returned: <input type="checkbox"/> Yes <input type="checkbox"/> No Date Out: / / Time Out: 		
Contractor Authorization: Signature: 		MPC Logistics Coordinator: Signature: CCTS DEMOB ENTRY Initial:
Total Billable Amount: \$ (Required for TAR)		MPC Project Controls Authorization: Signature:

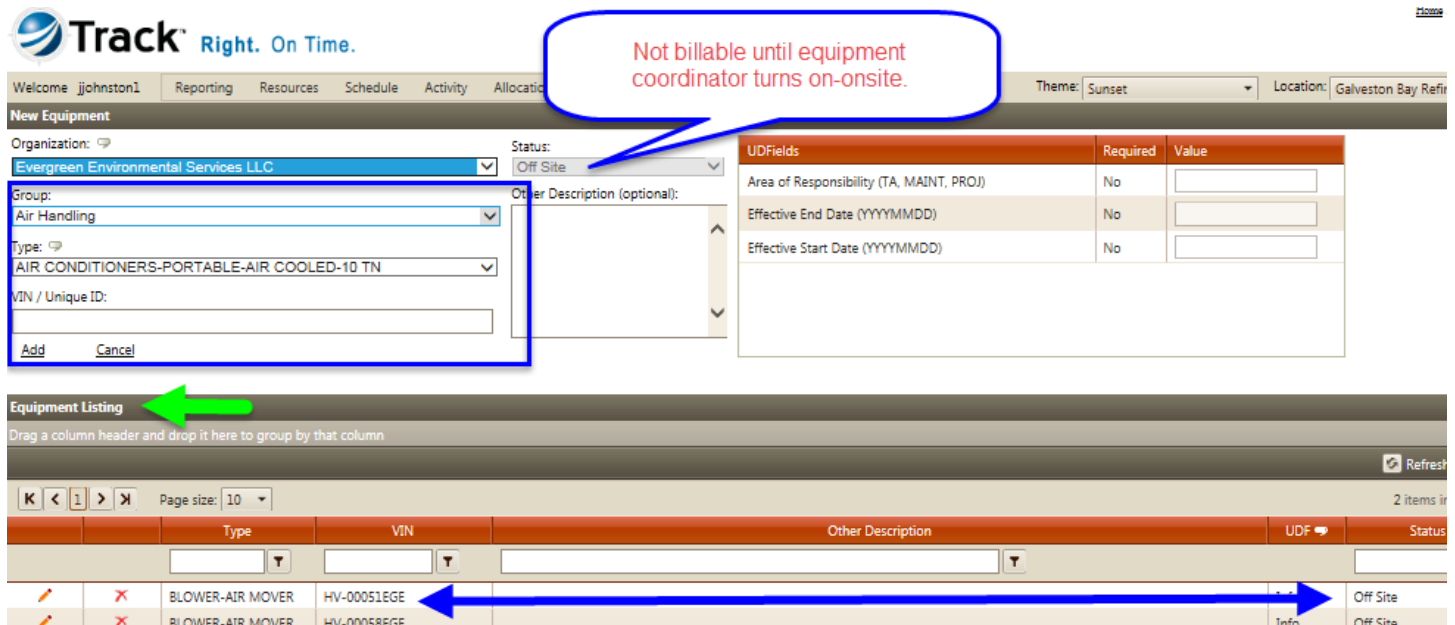
ADDING EQUIPMENT INTO TRACK

RESOURCES > ADD RESOURCES > ADD EQUIPMENT



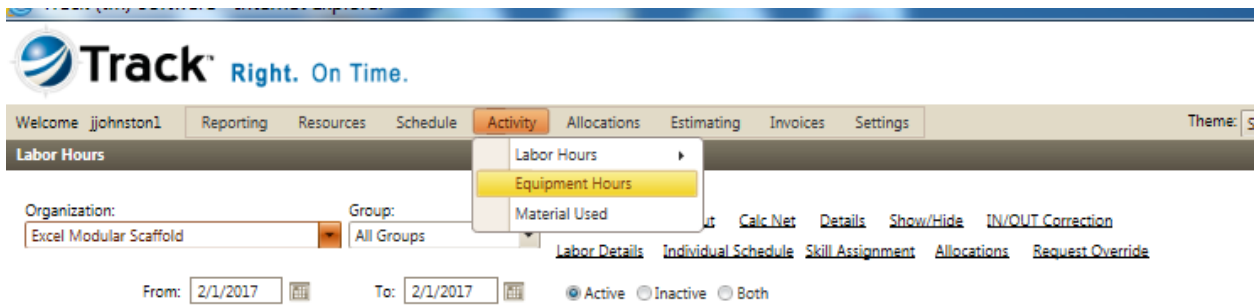
- Run the equipment rates by contract report (the group and type need to match exactly how the equipment rate was setup in track)
- Select the group and type
- Enter the VIN/ Unique ID (match the RER that is how equipment coordinator approves and turns onsite for billing). It is important to have this entered before getting to equipment coordinator cause without it entered they can't do anything with RER in track with turning it on to bill.

Note: There will be an error pop up but don't worry about it, just notice below the "equipment listing line that it is entered".



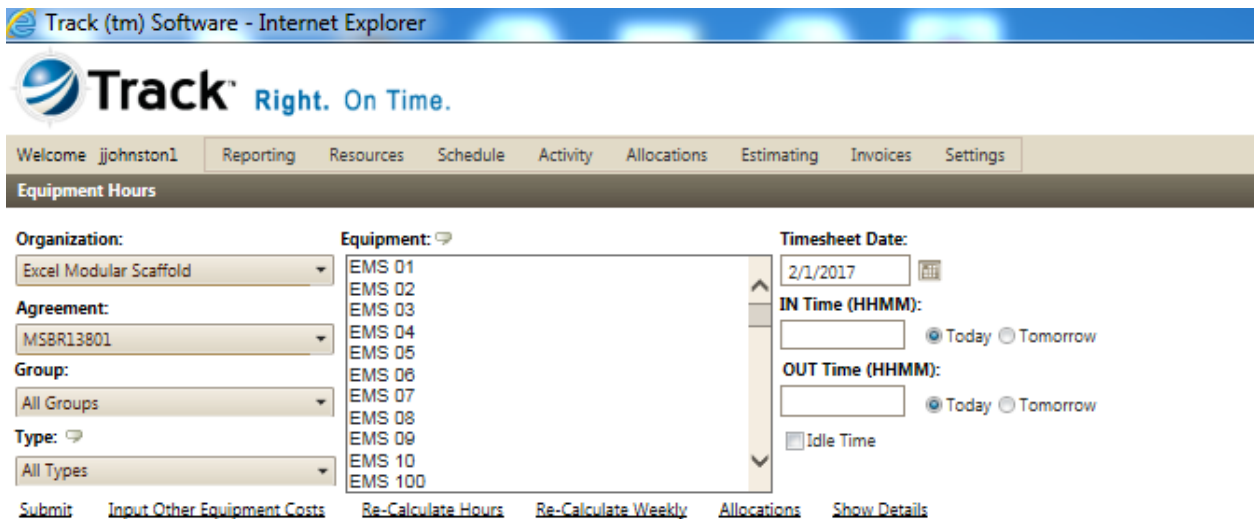
ENTERING EQUIPMENT ACTIVITY HOURS

ACTIVITY > EQUIPMENT HOURS



The screenshot shows the Track software interface. The top navigation bar includes 'Welcome | jjohnston1', 'Reporting', 'Resources', 'Schedule', 'Activity', 'Allocations', 'Estimating', 'Invoices', and 'Settings'. The 'Activity' menu is open, showing 'Labor Hours', 'Equipment Hours' (highlighted), and 'Material Used'. Below the menu, the 'Labor Hours' section is active. It includes fields for 'Organization' (Excel Modular Scaffold), 'Group' (All Groups), 'From' (2/1/2017), and 'To' (2/1/2017). There are also radio buttons for 'Active', 'Inactive', and 'Both'. A 'Submit' button is visible.

- Select the Group, Type, Equipment Item, Date, and enter the time IN and the time OUT then click Submit:

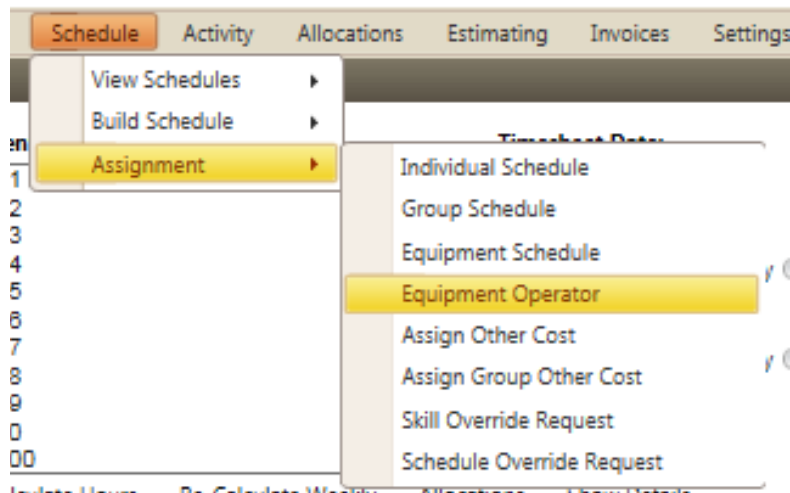


The screenshot shows the Track software interface with the 'Equipment Hours' form. The top navigation bar is the same as the previous screenshot. The 'Equipment Hours' section is active. It includes fields for 'Organization' (Excel Modular Scaffold), 'Agreement' (MSBR13801), 'Group' (All Groups), and 'Type' (All Types). The 'Equipment' list shows items from EMS 01 to EMS 100. The 'Timesheet Date' is 2/1/2017. There are fields for 'IN Time (HHMM)' and 'OUT Time (HHMM)', each with 'Today' and 'Tomorrow' radio buttons. An 'Idle Time' checkbox is also present. At the bottom, there are links for 'Submit', 'Input Other Equipment Costs', 'Re-Calculate Hours', 'Re-Calculate Weekly', 'Allocations', and 'Show Details'.

IMPORTANT- You must enter and allocate equipment in **date sequence**. Do not skip a billable day, enter next day, and then try to go back to the day skipped.

SETTING EQUIPMENT UP WITH OPERATOR

SCHEDULE > ASSIGNMENT > EQUIPMENT OPERATOR



- If you have more than one agreement, be sure to select the correct one.
- Highlight the equip Unique ID
- Choose resource name you want to assign as operator to that equipment
- Choose date range
- Click assign

The screenshot shows the 'Equipment Operator' form. It has several fields: 'Organization' (Excel Modular Scaffold), 'Agreement' (MSBR13801), 'Group' (All Groups), and 'Type' (All Types). There is a list of equipment IDs (EMS 01 to EMS 102). A green box labeled '1' highlights the 'Equip' column header. A green box labeled '2' highlights the 'Choose equip ID' text. A red circle labeled '3' highlights the 'Start Date' and 'End Date' fields. A red circle labeled '4' highlights the 'Assign' button. The 'Operator Name' field is set to 'Aburto, Andres'.

SETTING EQUIPMENT TO SCHEDULE

SCHEDULE > ASSIGNMENT > EQUIPMENT

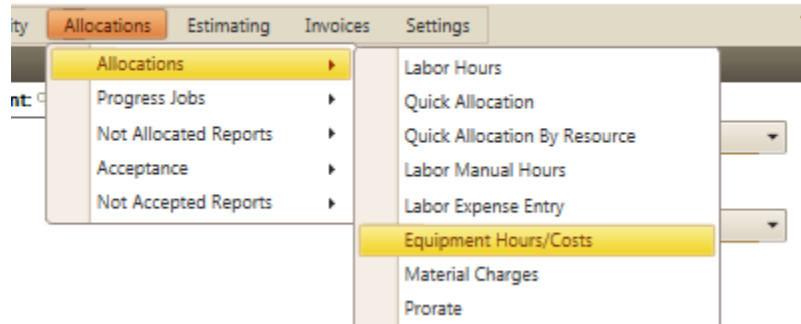
The screenshot shows the Track software interface with the 'Schedule' menu open. The 'Assignment' option is selected, leading to a sub-menu where 'Equipment Operator' is highlighted. The main form includes fields for Organization (Excel Modular Scaffold), Agreement (MS8R13801), Group (All Groups), and Type (All Types). On the right, there are fields for Shift (Equipment), Schedule Name (08 Hours), Start Date (2/6/2017), and End Date (2/6/2027), with an 'Assign' button at the bottom right.

- If you have more than one agreement, be sure to select the correct one.
- Highlight the equip Unique ID or ID's
- Choose schedule name (8, 10, or 12 hour)
- Choose date range
- Click assign

Note: This is good to use if the equipment is being used daily on same amount of hours and is a quick way of getting the hours in track to allocate.

ALLOCATING EQUIPMENT

ALLOCATIONS > ALLOCATIONS > EQUIPMENT HOURS/COSTS



- Select the appropriate Agreement, Allocation Date, Group, Type and Equipment Item
- Enter the 15-digit PO# in the “Purchase Order Line Item” field
- Enter the 7-digit WO# in the “Work Order” field
- Enter the GL Account **5401040 (REQUIRED)**
- Optional use of the Extra field for reconciling payments
- Click Allocate

A screenshot of the 'Allocate Equipment Hours/Other Costs' form in the software. The form contains several input fields: 'Organization' (Excel Modular Scaffold), 'Group' (All Groups), 'Order Type' (POWO), 'Agreement' (MSBR13801), 'Type' (All Types), 'Purchase Order Line Item', 'Allocation Date' (2/1/2017), 'Equipment' (a list with EMS 01 selected), 'Work Order', 'Extra', 'Area' (Default), 'GL Account' (5401040), and 'Hours Allocation'. A red box highlights the 'GL Account' field, and a green box highlights the value '5401040'. A green callout box on the right states 'Can highlight 3 at time if using same PO and WO.' The 'Allocate' button is highlighted with a purple box.

SETTING EQUIPMENT TO AUTO ALLOCATION

SCHEDULE > VIEW SCHEDULES > EQUIPMENT SCHEDULE

Track Right. On Time.

Welcome jjohnston1 Reporting Resources **Schedule** Activity Allocations Estimating Invoices Settings Theme: Sunset Location: Galveston Bay Refinery

Daily Scheduled Equipment

Organization: Local Modular Scaffold Date: 2/7/2017

View Schedules
Build Schedule
Assignment

Labor Schedule
Equipment Schedule
Resources Count
Est'd Labor Cost
Manpower

Group: All Groups

Type: All Types

Add Auto-Allocation

From: 2/7/2017 To: 2/7/2017
Order Type: Dropdown
Purchase Order Line Item: POWO
Work Order:
Extra:
Area ID: Default Area
GL Account: 5401040
Hours:
Assign Unassign

Equipment UID

Equipment UID	Assignment
EMS 01	
EMS 02	
EMS 03	
EMS 04	
EMS 05	
EMS 06	
EMS 07	
EMS 08	
EMS 09	
EMS 10	
EMS 100	
EMS 101	
EMS 102	
EMS 103	
EMS 104	

Legend: Lunch Break Holiday Exception Basic Assignment

1. Date Range
2. PO# 4100123456 (00001) = 410012345600001
3. WO#
4. GL Account = **5401040**
5. hours (Hint: setup the equipment schedule and use 8,10, 12 hours here)
6. Assign

- Enter date range
- Enter the 15-digit PO# in the "Purchase Order Line Item" field
- Enter the 7-digit WO# in the "Work Order" field
- Optional use of the Extra field for reconciling payments
- Enter the GL Account 5401040 (REQUIRED)
- Hours (8, 10, or 12)
- Assign

Note: You must touch/highlight the equipment ID name in allocation screen for the auto-allocation to populate.

EQUIPMENT DETAILS

- Pull equipment rates by contract report to verify rates and how the equipment has been setup by procurement.
- In equipment hours screen, choose a piece of equipment and then click on “show details” to see week and month start dates. *equip start dates reset after the equip has not been billed for 30 days.

Track™ Right. On Time.

Welcome kaliebrown | Reporting | Resources | Schedule | Activity | Allocations | Estimating | Invoices | Settings | Theme: Default

Equipment Hours

Organization: Rabalais I&E Constructors

Equipment: #352, #496, #497, #500, #505, #506, #6540, #6548, #6568, #6571

Timesheet Date: 7/10/2017

IN Time (HHMM): Today Tomorrow

OUT Time (HHMM): Today Tomorrow

☐ Idle Time

Submit | Input Other Equipment Costs | Re-Calculate Hours | Re-Calculate Weekly | Allocations | **Show Details**

Equipment IN/OUTs		Details										Type	Net Hours	Source	
Equip	UID	Base Hrs	Over Hrs	Idle Hrs	Base Mx	W. Hrs	M. Hrs	W.C. Hrs	M.C. Hrs	W.S. Date	M.S. Date	Rate			
X	#496	8.33	1.67	0.00	0.00	0.00	0.00	0.00	16.67	7/10/2017	7/7/2017	Hrs	On Site Operating	10.00	Schedule

- To verify equipment activity and billing, pull the equipment daily activity & costs report. Based off your monthly start date for the equipment, you can verify that the correct monthly rates have been charged.

TIP: If you accidentally enter equipment out of order, and the days after the day missed have not been authorized, delete the allocations and then make sure to Re-Calculate day and Re-Calculate week on the equipment hours screens for the days deleted. You will then be able to go back and enter the hours for the day that was skipped without receiving an error.

Track™ Right. On Time.

Welcome kaliebrown | Reporting | Resources | Schedule | Activity | Allocations | Estimating | Invoices | Settings

Equipment Hours

Organization: Ohmstede United Industrial Services

Equipment: *OIS-.75 TN TRK-RM1, *OIS-.75 TN TRK-RM2, *OIS-.75 TN TRK-RM3, *OIS-.75 TN TRK-RM4, *OIS-.75 TN TRK-RM5, *OIS-.75 TN TRK-RM6, *OIS-16"TOOL TLR-RM1, *OIS-16"TOOL TLR-RM2, *OIS-16"TOOL TLR-RM3, *OIS-2.25" TENS-RM1, *OIS-2.25" TENS-RM10

Timesheet Date: 7/10/2017

IN Time (HHMM): Today Tomorrow

OUT Time (HHMM): Today Tomorrow

☐ Idle Time

Submit | Input Other Equipment Costs | **Re-Calculate Hours** | **Re-Calculate Weekly** | Allocations | Show Details

Equipment IN/OUTs

ENTERING MATERIAL

ACTIVITY > MATERIAL USED

Track (tm) Software - Internet Explorer

Track Right. On Time.

Welcome jjohnston1 | Reporting | Resources | **Activity** | Allocations | Estimating | Invoices | Settings

Base Criteria

Report Category: ALL REPORTS | Select Report: Full Data Extract | Load Report Criteria: | Add | Delete

From: 1/2/2017 | To: 1/23/2017 | Use Track Database

Your report is being opened in a new window.

Select Display Option: ☐ PDF ☒ Excel ☐ Rich Text ☐ MS Word ☐ Crystal Report | [Display Report](#) | [Report Delivery Options](#)

Extended Criteria

Organization: Evergreen Environmental | Level 1: All Level 1s | Extra 1: | Level 2: All Level 2s

Track Right. On Time.

Welcome jjohnston1 | Reporting | Resources | Schedule | **Activity** | Allocations | Estimating | Invoices | Settings | Theme: Sunset | Location: Galveston Bay Refinery

Material Used

Organization: Wood Group Mustang | Item: Contractor Engineering-Support | Charges Description: | Item Rate: Receipt - Purchase for Job

Agreement: EPBR13614 | Unit Price(\$): | Unit: | Quantity: | Tax(\$):

Group: Contractor Engineering | Receipt Reference #: | Add | Reset | Allocations

Timesheet Date: 1/24/2017

Material Charges Listing

Drag a column header and drop it here to group by that column

Page size: 10

Item	Desc.	Receipt	Price(\$)	Unit	Qty.	Tax(\$)

No records to display.

1. Run **material rates by contract** to know the group and type setup.
2. Choose **group** (drop down) and **item** (click to highlight).
3. Enter **charges description**
4. **Unit price**
5. **Unit**, Example: Each
6. **Quantity** - just put 1 if the unit price is already total cost.
7. **Tax**- have to put something, so if no tax put 0.
8. The **receipt ref#** has to match exactly the invoice name being uploaded.

- Note: Run the material rates by contract by double clicking reporting and search in drop down the report and click display report.
- Important: Notice below select when uploading the progress of the load, be patient and be sure to get green circle or dot before clicking add.

ALLOCATING MATERIAL

ALLOCATIONS > ALLOCATIONS > MATERIAL CHARGES



Reporting Resources Schedule Activity **Allocations** Estimating Invoices Settings

Allocate Material Charges

Organization: Excel Modular Scaffold Group: All Groups

Agreement: MSBR13801 Item: Contractor Equip - Markup

Allocation Date: 1/22/2017

Extra:

Area:

Work Order:

Allocations

- Progress Jobs
- Not Allocated Reports
- Acceptance
- Not Accepted Reports

Labor Hours

Quick Allocation

Quick Allocation By Resource

Labor Manual Hours

Labor Expense Entry

Equipment Hours/Costs

Material Charges

Prorate

- Select the appropriate Agreement, Allocation Date, Group, and Material Item
- Enter the 15-digit PO# in the “Purchase Order Line Item” field
- Enter the 7-digit WO# in the “Work Order” field
- Optional use of the Extra field for reconciling payments
- Click Allocate



Reporting Resources Schedule Activity **Allocations** Estimating Invoices Settings

Allocate Material Charges

Organization: Excel Modular Scaffold Group: All Groups

Agreement: MSBR13801 Item: Contractor Equip - Markup & Support

Allocation Date: 1/22/2017

Extra:

Area: Default

GL Account:

Order Type: POWO Drop-Down List?

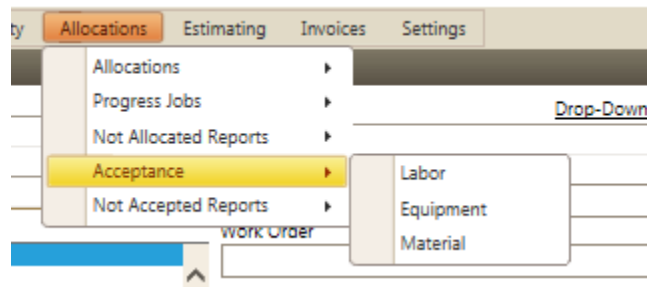
Purchase Order Line Item

Work Order

Allocate Materials Used Acceptance

ACCEPTING ALLOCATED COSTS

ALLOCATIONS > ACCEPTANCE > LABOR, EQUIPMENT, OR MATERIAL



Once in screen:

A screenshot of the Track software interface. The top navigation bar includes 'Welcome jjohnston1', 'Reporting', 'Resources', 'Schedule', 'Activity', 'Allocations', 'Estimating', 'Invoices', 'Settings', 'Theme: Outlook', and 'Location: Galveston Bay Refinery'. The main heading is 'Accept Labor Hours/Costs'. Below this, there are fields for 'Organization: Duane Houkom' and 'Group: All Groups'. A date field shows '1/10/2017' with a calendar icon. A 'Go' button is next to the date field. Below these fields is a table titled 'Hours and Costs Not Allocated' with columns for 'Hours' and 'Other Costs'. The 'Hours' column shows '0.00' and the 'Other Costs' column shows '\$0.00'. Below the table is a section titled 'Acceptance Detail' with a 'Check All' and 'Uncheck All' button. A table below this section has columns for 'Resource Name', 'Hours', 'ST', 'OT', 'DT', 'R4', 'R5', 'R6', and 'Other Cost'. The first row shows 'Grosscup, Barry' with values of 0.00 for Hours, ST, OT, DT, R4, R5, and R6, and 145.00 for Other Cost. A callout box with a blue border and red text says: 'Make sure to be on the (1) correct date, (2) click go to show allocation, (3) click in the box to check resource and then click (4) accept/unaccept items button.' The callouts are numbered 1 through 4: 1 points to the date field, 2 points to the Go button, 3 points to the checkbox in the first row of the table, and 4 points to the 'Accept / Unaccept Items' button.

1. Date
2. Click Go
3. ✓ in box one by one or can click check all
4. Click Accept/Unaccept Items to accept, will turn green

Note: To unaccept, do just the opposite -- uncheck and click same Accept/Unaccept button, will turn white.

GBR expectation is that the billing is balanced and accepted within a week.

NOT ALLOCATED/NOT ACCEPTED REPORTS

- › Select Allocations / Not Allocated Reports / Labor, Equipment, or Material
- › Select the Organization from the Organization drop-down box
- › For Labor, you may also select a Group from the Group drop-down box
- › Enter the beginning date in the From text box or select the date from the calendar
- › Enter the ending date in the To text box or select the date from the calendar (for a date range)
- › Click View

NOTE: If all hours and costs have been allocated, a message will be displayed. Changing organizations or dates will not refresh the screen; clicking **View** is the only way to refresh the screen.

FREQUENTLY USED REPORTS

<u>Report Name</u>	<u>Description</u>
Allocated and Not Authorized - w/Area IDs	A listing of allocations awaiting Authorization with Area IDs
Allocation Import Form - Equipment (EXCEL)	A listing of all activity for a date or date range in the layout of the Equipment Allocation import.
Daily Activity	A listing of personnel for an organization by group showing their clocked in and out times, scheduled start and end times, and total time on site.
Equipment Daily Activity & Costs	A listing of equipment activity, allocation, and costs for a date or date range sorted by Company, Group, Type, Equipment ID, and Timesheet date.
Equipment Rates by Contract	A listing of equipment and rates by contract.
Full Data Extract_TotalCost_ERPCodes	Complete extract of all allocation data for Labor, Equipment, and/or Material.
Labor Rates by Contract	A listing of labor rates by Organization, Agreement, and Skill.
Labor Agreement Other Costs Assignments	A listing of all agreements and other costs assignments to labor resources by company. Lists all resources per diem assignments, including start and end dates.
M-Allocation Import Form (Excel)	A listing of personnel with calculated net hours to assist with Allocation imports.
M-Track Reconciliation Report with Authorized Date	By Location, Filters on From and To Date, Organization, Level 1, TS Ref, Inv No.,Extra Field A report for the vendor to use for reconciling the payments received, this reports both accepted and authorized date.
Material Rates by Contract	A listing of material rates by contract.
Personnel Information (Excel)	A listing of personnel with all personnel IDs for Excel.
Personnel List with Agreement, Skill, & Rates	Lists ACTIVE Personnel with their Agreement and Skill assignment with rates.
Total Hours Detail Per Person	A listing of ST/OT/DT and Extra Charges per person per day for a date range. Pull this for the week to easily check 40+

RESOLVING REJECTED ALLOCATIONS

When the Marathon approvers review allocations, they have an option to reject as well as approve. When an allocation is rejected, an internal message is generated and sent to the Timekeeper that accepted the allocation and will appear on their Home screen.

Rejection messages can be overlooked so it is important to run a report for rejected allocations at least once a week. There is a report called “Rejected Allocations”. This report is a PDF version with details, sorted by date, then by person.

Regardless of the reason for the rejection, the allocation must be unaccepted before anything can be done to correct it. Below are examples for resolving the most common types of rejections.

Unaccepting a rejected allocation:

- › Select Allocations / Allocations / Labor Hours
- › Enter the date in the Date text box
- › Select the specific person from the Resources list box
- › Click the Accept/Unaccept Allocation link to unaccept all the allocations

- › OR

- › Select Allocations / Acceptance / Labor
- › Enter the date in the Date text box
- › Click Go
- › Uncheck one or more Personnel from the list (NOTE: All resources with rejected Allocations will have an “R” next to their name)
- › Click Accept/Unaccept Items (all resources unchecked will become Unaccepted or remain Unaccepted, depending on the current status. All resources checked will become Accepted or remain Accepted, again depending on the current status.)

CONTRACTOR TIMEKEEPER – CHECKLIST

Labor

- Check for Rejected Allocations and/or Overrides
- Identify new resources
- Submit Request for Agreement/Skill & Schedule assignments (PRF) for new resources
- Review Labor Hours for prior working day(s)
- Submit Requests for Overrides
- Allocate Labor Hours and Costs
- Run Not Allocated Report
- Run daily reports
- Accept Allocated hours weekly after you have balanced payroll.
- Run Not Accepted Report

Material

- Check for Rejected Allocations
- Add Material used for a Timesheet Date
- Attach backup documentation for Receipt Required Material Items
- Allocate Material Costs
- Run Not Allocated Report
- Accept Material Costs
- Run Not Accepted Report
- Run daily reports

Equipment

- Check for Rejected Allocations
- Enter Unique Equipment ID (manually) for new equipment
- Submit RERs for Approval to the Equipment Coordinator
- Enter Equipment Hours
- Allocate Equipment Hours and Costs
- Run Not Allocated Report
- Accept Equipment Hours and Costs
- Run Not Accepted Report
- Run daily reports