FLEXTRACK™

Contractor User Guide
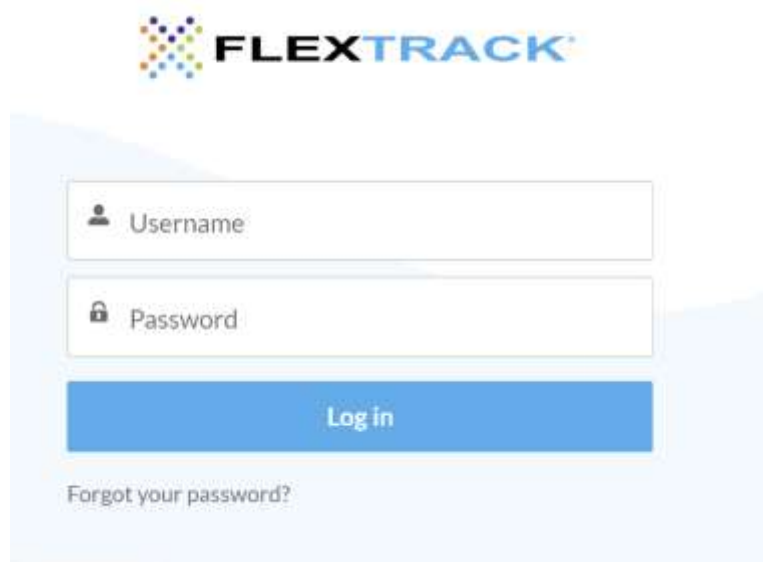
Unit Sheets

Contents

Getting Started

Accessing Flextrack

Username and passwords are provided to you via email at the time of onboarding. To access the VMS:

1. Please go to the following URL and enter your username and password.
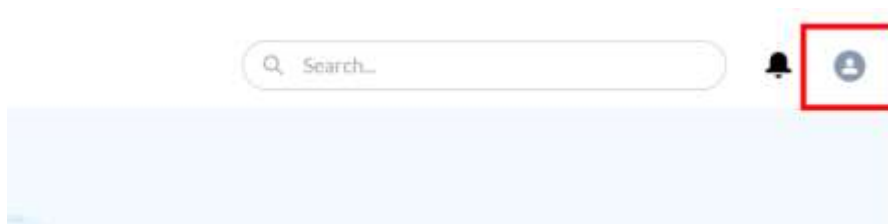
    https://flextrack-deloitte.my.site.com/contractors/s/

2. Enter the login credentials provided and click **'Login'.**

Updating Profile Settings

1. To change profile settings, click the profile icon in the top right-hand corner and select '**My Settings'.**

2. On **"Details"** tab, click '**Edit'** and update contact information as needed. Email notifications are sent to the email address listed in your profile.

3. On **'My Settings'** tab, change password and language preferences as needed.
   a. For English, please change Language to **'English'** and locale to **'English (Canada)'**.
   b. For French, please change Language to **'French'** and locale to '**French (Canada)'**.

Access all Unit sheets

1. Login to the Flextrack VMS and select '**Unit Sheets'** from the top navigation bar.
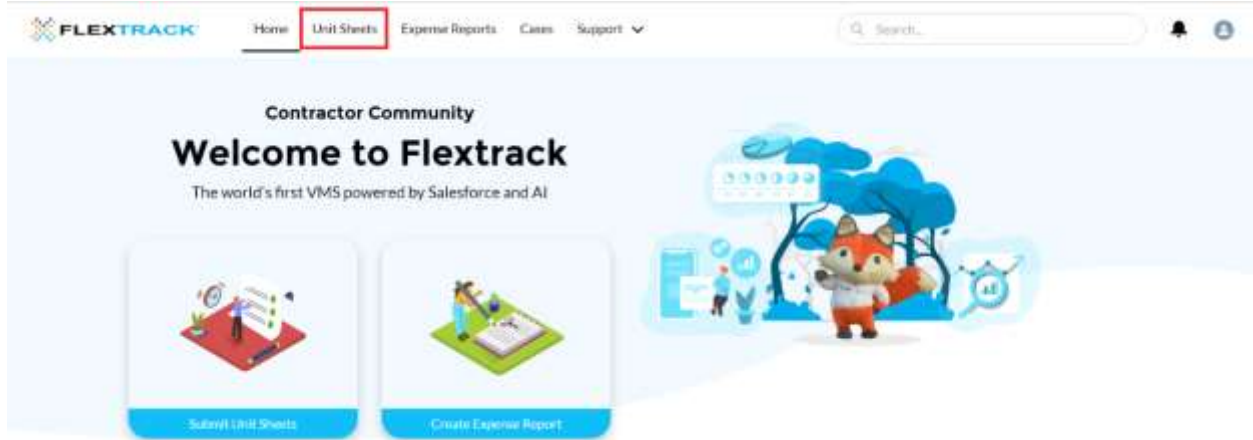
1. The page defaults to show a list of recently viewed unit sheets. To change the list view, select the drop-down arrow icon. The list is also searchable in the search toolbox. All columns can be sorted alphabetically or numerically by clicking on the column header and sorting.
   a. **Note:** You can also change the default list view by clicking on the pin icon on the right of the drop-down arrow icon.

2. Click the blue hyperlink for the desired unit sheet in the 'Sheet #' column to review detailed information on unit sheet.
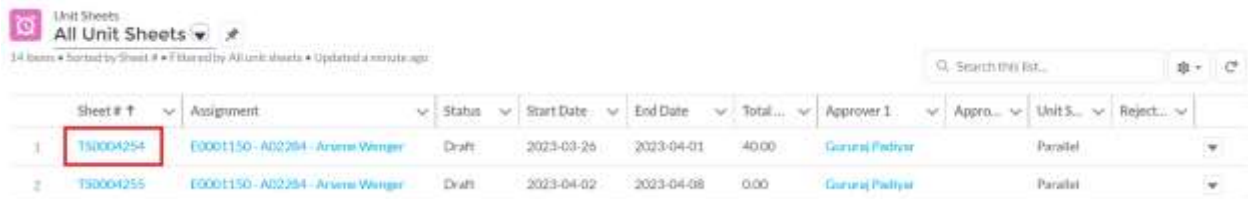
Regular Unit Sheets (Hourly, Monthly, Daily, Fixed Price or Per Word)

Regular Unit Sheets Overview

- Unit sheets must be submitted and approved in the Flextrack VMS.
- Once a Unit Sheet has been submitted, the eligible Unit Sheet Approver(s) will be notified by email to review the timesheet details.
    - If approved, you will receive an email notification
    - If rejected, you will receive an email notification. The Approver can also leave a comment to explain the reason for rejection.
- Unit sheet approval is **final.** Once approved, transactions and invoices are automatically created and the unit sheet cannot be reopened or modified in the Flextrack VMS. If there is an error on your approved Unit Sheet, please contact your Supplier for assistance.
- Unit Sheets that are submitted for approval with 0 units will be automatically approved.
- At least one charge code must be added to your Engagement-Assignment before any time can be saved or submitted. If you are unsure which charge code to enter, please contact your Hiring Manager.
- You can view the status of your unit sheets at any time in the Flextrack VMS

Unit Sheet Status	Definition
Draft	Unit sheet has not been submitted, the Unit Sheet Approver(s) cannot approve the unit sheet in this status.
Submitted for Approval	Unit sheet has been submitted and is pending approval by Unit Sheet Approver(s)
Approved	Unit Sheet Approver has approved Unit Sheet
Rejected	Unit Sheet Approver has rejected Unit Sheet. You can modify the Unit Sheet and resubmit for approvals.

Create & Submit Regular Unit Sheet

1. Upon login, you will be taken to the Flextrack home screen. Click '**Submit Unit Sheets'**.

2. Click the blue hyperlink corresponding to the desired time period in the 'Sheet #' column.

3. Upon selecting a Unit Sheet, you will be taken to the specific Unit Sheet's page. Here you can view Details and Unit Sheet History.

Note: Punch-in Entry: Allows you to record the time you started and completed the job. Additional information on using punch-in time entry is available in the Punch-In section below.

4. Enter all unit entry details and click '**Save'** once completed.
    a.   Rate: Select the correct rate from the dropdown rate list

      b.   Charge Code: Select the correct charge code

          i.   Please note that only one charge code can be selected per line. If you are using multiple charge codes, please create a separate line for each charge code.

      c.   Units: Enter the number of units

          i.   For hourly, enter the number of hours worked

          ii.   For per word, enter the number of words

          iii.   For monthly, fixed price or daily, please enter a number up to 1. The maximum entered should not exceed 1 unit across all your unit entries.

      d.   Comments: Each box for unit entry has a comment option and you can add/edit comments as needed.

      e.   Add row: Select this option to add another unit entry line using different charge codes and/or rates.

If you are selecting a **monthly, fixed price or daily** rate, the total of all unit entries must **not exceed 1 unit** whether you are using 1 charge code or multiple charge codes. For example:

5. Once satisfied, click '**Submit Unit Sheet' in the top right-hand corner of the page.**

      a.   It is very important that you ensure your unit entries are correct prior to submitting for approval.

      b.   You can delete unit entries if entered incorrectly or add additional unit entries as required.

      c.   You can leave unit entries in draft to submit for later.

6. A warning message will appear, click '**Next'** to proceed.

Submit Unit Sheet

Would you like to proceed with submitting Unit Sheet TS0004254 for approval?

Next

7. The unit sheet status will change to 'Submitted for Approval'. The Unit Sheet approver will
    review and either approve or reject the unit sheet.
    a. If rejected, please correct, and resubmit the unit sheet with the correction required.

Punch In Unit Sheets

Punch In Overview

The Flextrack VMS includes a punch clock/time tracking feature.

- The Punch In option should only be selected if you have been directed by your Manager to use punch in timesheets.
- The Punch In functionality will track time once initiated and will retain the tracked session even if the screen is refreshed, the tab closed or if you log out of the VMS.
- You must click the 'Stop' button to end the punch clock timer.
- You can only have a single session at a time running – you cannot double-track time (ie. start simultaneous, parallel tracked sessions)

Create & Submit Punch In Unit Sheet

1. Upon login, you will be taken to the Flextrack home screen. Click '**Submit Unit Sheets**'.

2. Click the blue hyperlink corresponding to the desired time period in the 'Sheet #' column.

3. Upon selecting a Unit Sheet, you will be taken to the specific Unit Sheet's page. Here you can view Details and Unit Sheet History. To add an entry, click '**Add Unit Entry' in the top right-hand corner.**

4. Select a Rate and Charge Code and click '**Start Timer'**.
   a. If you have multiple rate types, please ensure to select an **hourly rate** (specified in the rate description)

Add Unit Entry

Rate Selection

Showing 2 of 2 items • 1 item selected

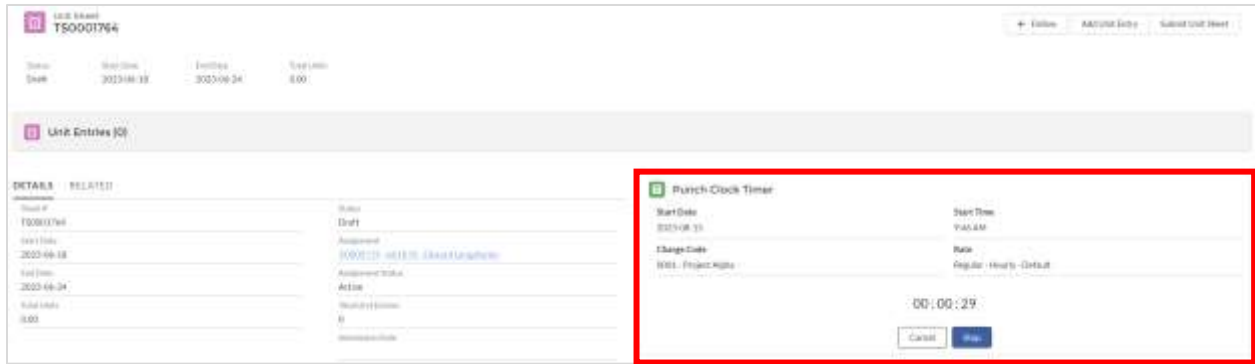| Descrip... ∨	Pay Rate ∨	Start D... ∨	End Date ∨
○ Regular - Daily - Default	$50.00	Jun 24, 2023	Sep 29, 2023
● Regular - Hourly - Default	$50.00	Jun 24, 2023	Feb 23, 2024

Charge Codes

Showing 1 of 1 item • 1 item selected

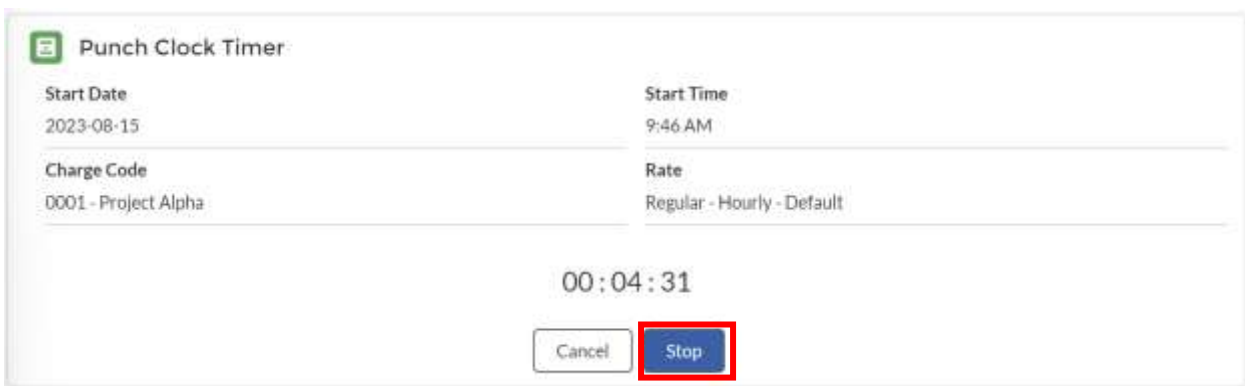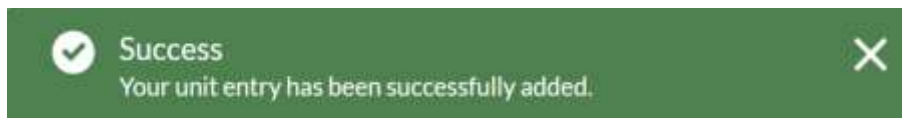| Charge ... ∨	Descrip... ∨	Start D... ∨	End Date ∨
● 0001	0001-Project Alpha	Nov 26, 2022	Jun 28, 2024

Task

Comments

Cancel   **Start Timer**

5. The timer will be started.
    a. The Punch Clock will retain the tracked session even if you refresh your screen, close the tab or log out. The Unit Sheet will retain an area where you can navigate to in order to reopen the previous time tracking session.
    b. The Punch Clock system only allows you to have ONE session at a time running. You cannot double-track your time (ie. start simultaneous, parallel tracked sessions) and must stop the timer if you wish to start another session.

6. Once work is completed, navigate to the Unit Sheet and click **'Stop'**. A success message will display on the screen notifying you the unit entry was saved successfully.

Punch Clock Timer

Start Date	Start Time
2023-08-15	9:46 AM
Charge Code	Rate
0001 - Project Alpha	Regular - Hourly - Default

00:04:31

Cancel   Stop

Success
Your unit entry has been successfully added.

7. Once satisfied, click '**Submit Unit Sheet' in the top right-hand corner of the page.**
   a. **Note:** It is very important that you ensure your unit entries are correct prior to submitting for approval.
   b. You can delete unit entries if entered incorrectly or add additional unit entries as required.
   c. **Note:** You can leave unit entries in draft to submit for later.

8. A warning message will appear, click '**Next'** to proceed.

Submit Unit Sheet

Would you like to proceed with submitting Unit Sheet TS0004254 for approval?

Next

9. The unit sheet status will change to **'Submitted for Approval'**. The Unit Sheet approver will review and either approve or reject the unit sheet.
   a. If rejected, please correct, and resubmit the unit sheet with the correction required.

Add Files to Unit Sheet

Files can be uploaded to Unit Sheets. Unit Sheets can be recalled while in a status of **Submitted for Approval**. Once a Unit Sheet has been approved, no revisions can be made. To recall a Unit Sheet, please:

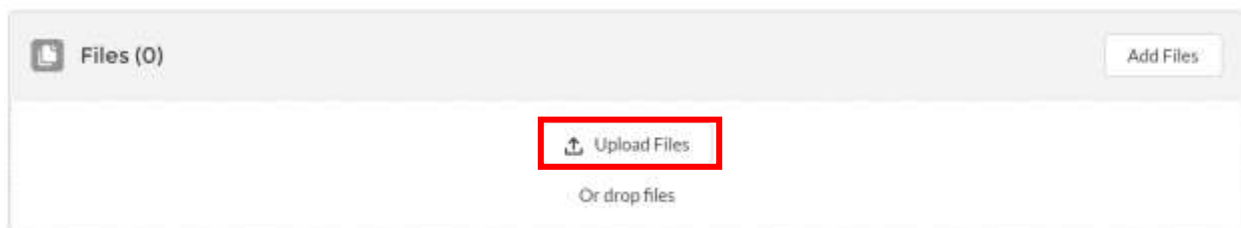1. Login to the Flextrack VMS and select **'Unit Sheets'** from the top navigation bar.

2. Click the blue hyperlink for the desired unit sheet in the **'Sheet #'** column to review detailed information on unit sheet.
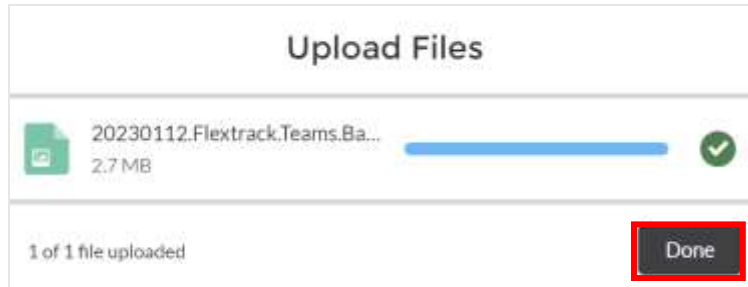
3. Scroll down to Files section and click '**Upload Files'** or **'Add Files'**.
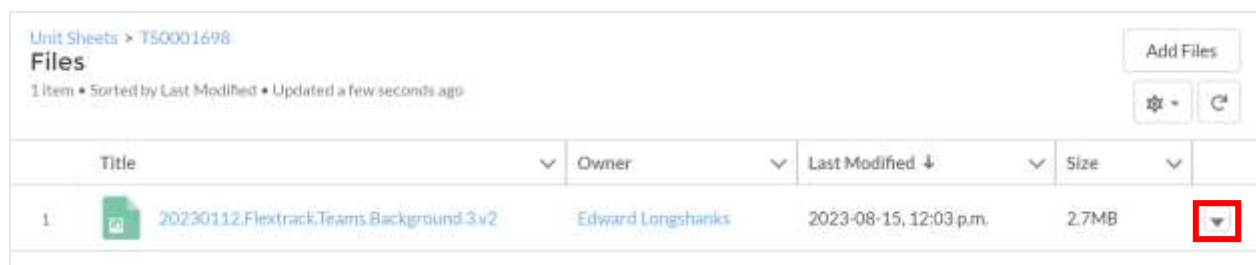
4. Search for and select the file on your computer, Once the file has finished uploading, click **'Done'**

5. To delete a file, click **'View All'** in the Files section.

6. Click the down arrow ( ) next to the File and select **'Delete'** from the drop-down list of options.
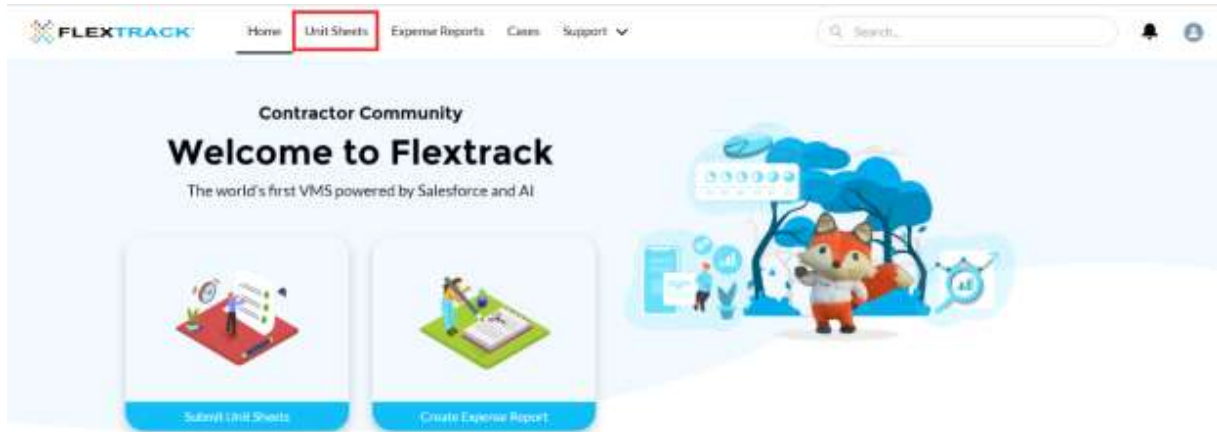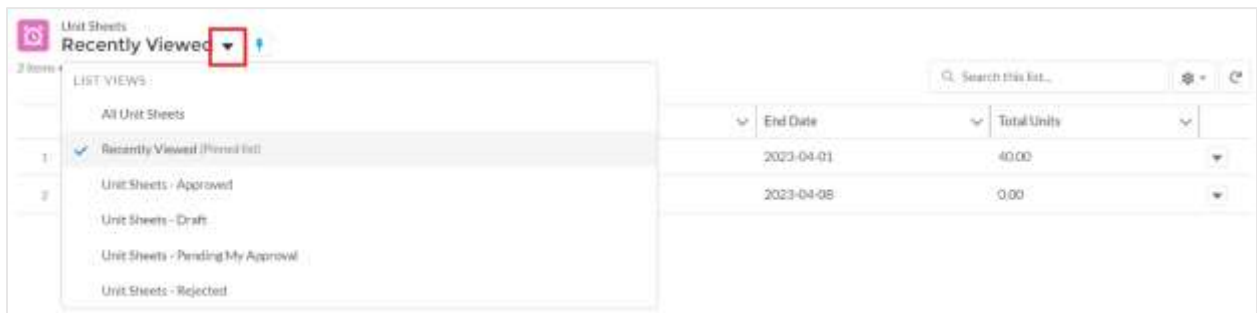
Recall Unit Sheet

Unit Sheets may only be recalled while in a status of **Submitted for Approval**. Once a Unit Sheet has been approved, no revisions can be made. If your unit sheet has already been approved and needs to be modified, please contact your supplier.
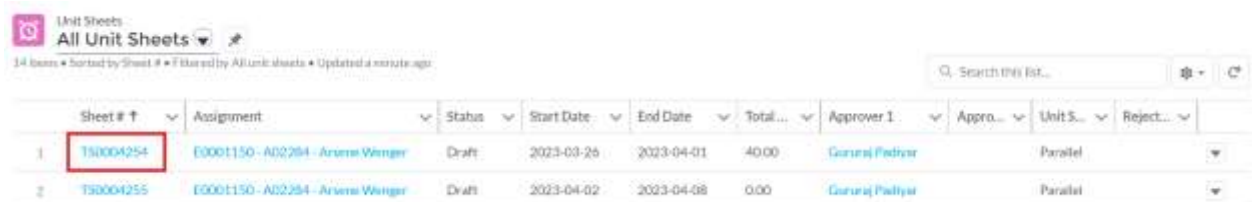
To recall a Unit Sheet, please:

2. Login to the Flextrack VMS and select **'Unit Sheets'** from the top navigation bar.

7. The page defaults to show a list of recently viewed unit sheets. To change the list view, select the drop-down arrow icon. The list is also searchable in the search toolbox. All columns can be sorted alphabetically or numerically by clicking on the column header and sorting.
    a. **Note:** You can also change the default list view by clicking on the pin icon on the right of the drop-down arrow icon.

8. Click the blue hyperlink for the desired unit sheet in the **'Sheet #'** column to review detailed information on unit sheet.

9. Scroll down to approval history details and click '**Recall'.**

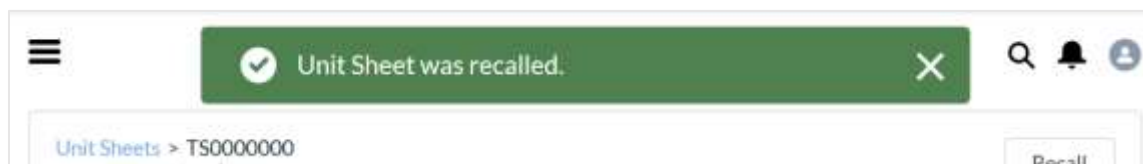10. Enter Comments and click '**Recall'.**

11. A success message will appear at the top of the screen. The unit sheet can now be amended and resubmitted for approval.

Revise or Delete Unit Entries

Unit Entries can be revised or deleted while a Unit Sheet is in the status of **Draft** or **Rejected.** If the unit sheet is in a status of **Submitted for Approval**, the Unit Sheet must be recalled using instructions in **Error! Reference source not found.** before any revisions can be made.
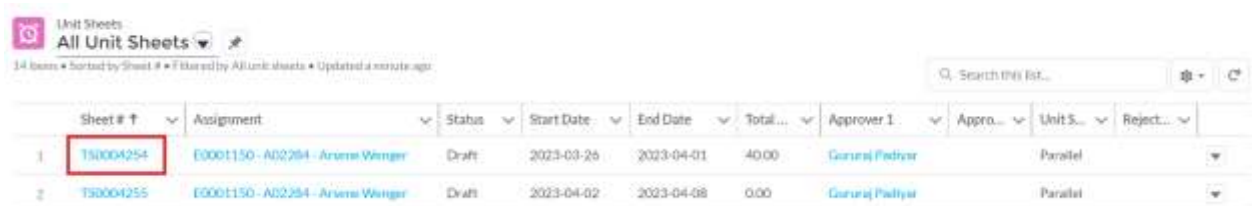
1. Login to the Flextrack VMS and select **'Unit Sheets'** from the top navigation bar.

2. The page defaults to show a list of recently viewed unit sheets. To change the list view, select the drop-down arrow icon. The list is also searchable in the search toolbox. All columns can be sorted alphabetically or numerically by clicking on the column header and sorting.
   a. **Note:** You can also change the default list view by clicking on the pin icon on the right of the drop-down arrow icon.
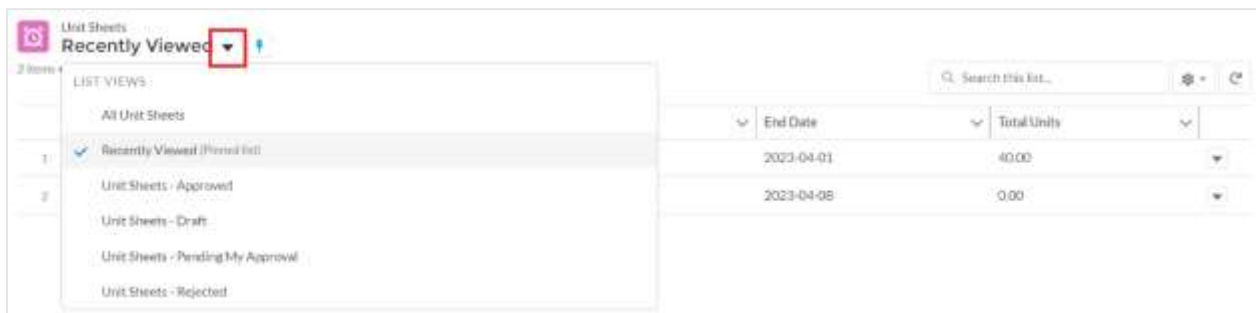
3. Click the blue hyperlink for the desired unit sheet in the **'Sheet #'** column to review detailed information on unit sheet.

4. If the Unit Sheet is in a status of **Draft** or **Rejected**, revisions can be made directly.

5. To delete a unit entry, click the trashcan icon next to the unit entry line.

6. To edit an existing unit entry, click into the boxes for the rate, charge code or units as required. Make revisions as needed and click 'Save' once completed.

7. Please ensure to resubmit the Unit Sheet for approval once all revisions have been completed by selecting **'Submit for Approval'** in top right hand corner.

Support

To access reference guides or for technical support, please click **'Support'** in the top navigation bar.
Select **'Help Center'** to access the Quick Reference Guides or select **'Contact Us'** for further questions.