



E-TRACKS

Trainee User Manual

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1. Register on the system

Step 1:

Register on the system by clicking the “Register” Link:

Deloitte.

e-Tracks

Jobs

Log In

Please enter your username and password. [Register](#) if you don't have an account.

Account Information

Username:
sysadmin

Password:



☐ Keep me logged in

Log In

Step 2:

Enter your details in the form and then click “Create User”

e-Tracks

Jobs

Create a New Account
Use the form below to create a new account.

Account Information

User Name:

E-mail:

First Name:

Last Name:

Staff Number:

Level:

Sub Level:

Branch:

Group:

Race:

Gender:

☐ SAICA Accredited?

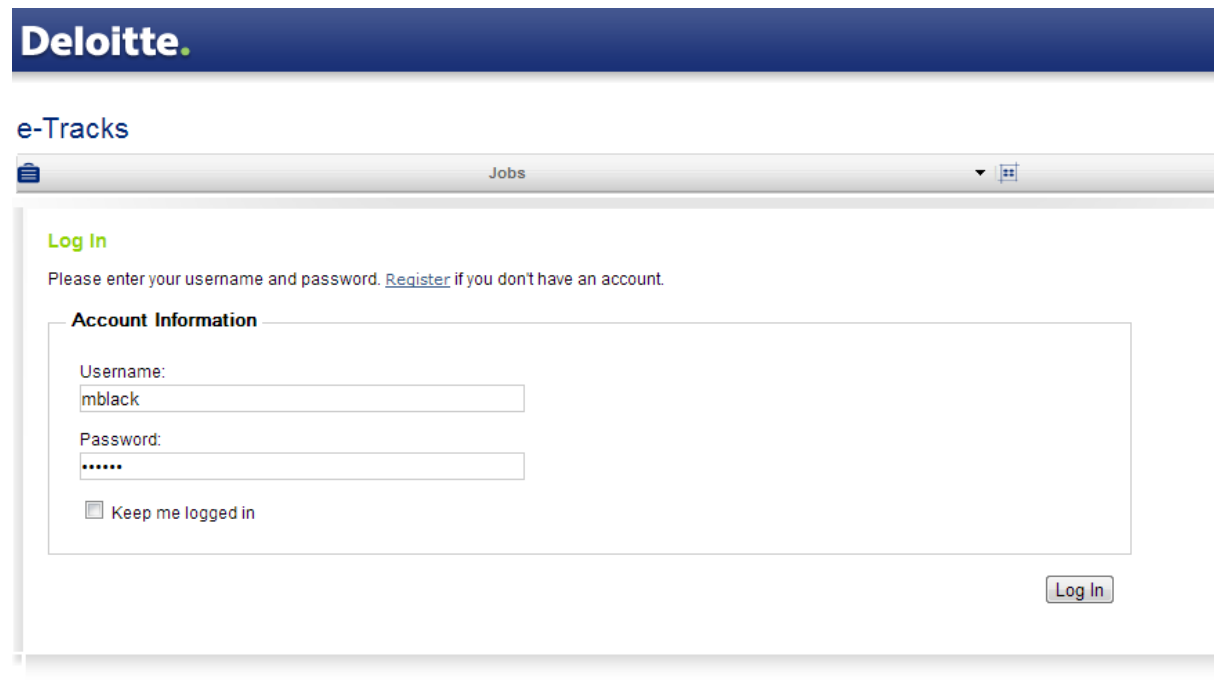
Create User

Note: Your user name is your Deloitte user name that you log into the Deloitte network with.

2. Log in

Step 3 (this will be the starting point using the system going forward):

Log into the system using your Deloitte user name and password and click “Log in”.



The screenshot shows the Deloitte e-Tracks login interface. At the top is a dark blue header with the "Deloitte." logo. Below this is a light blue bar with the text "e-Tracks". A navigation bar below that contains a "Jobs" link and a dropdown menu. The main content area is titled "Log In" in green. It contains a message: "Please enter your username and password. [Register](#) if you don't have an account." Below this is a section titled "Account Information" which contains two input fields: "Username:" with the value "mblack" and "Password:" with masked characters "*****". There is also a checkbox labeled "Keep me logged in". A "Log In" button is located at the bottom right of the form.

Deloitte.

e-Tracks

Jobs

Log In

Please enter your username and password. [Register](#) if you don't have an account.

Account Information

Username:
mblack

Password:

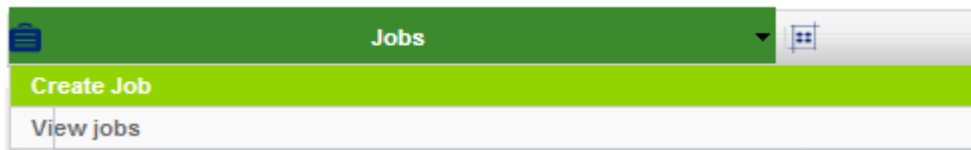
☐ Keep me logged in

Log In

3. Create a Job (Assignment)

****This will now be done by the planning team***

To capture a new assignment / job, click the Jobs → Create Job menu item



This will open the Job Capture Screen.


Step 1: Fill in the assignment details


A screenshot of a web application showing the 'Job Details' form. The form is titled 'Job Details' in blue text. Below the title is a light blue header bar with a menu icon and the text 'JOB DETAILS'. The main form area is white and contains several fields: 'Job Name (Client):' with a text box; 'Start Date:' with a text box containing '2012/11/11' and a calendar icon; 'Estimated End Date:' with a text box containing '2012/11/11' and a calendar icon; 'Review Period:' with a dropdown menu showing '2012/2013 - Mid year'; 'Hours:' with a text box containing '0'; 'Current Review Status:' with a text box containing 'Not Started'; 'Review Date:' with a text box and a calendar icon; 'Discussion Date:' with a text box and a calendar icon; and 'Sign off Date:' with a text box and a calendar icon.

- Type in the name of the client in the Job Name (Client) text box
- Set the start date and estimated end date by selecting the calendar icon next to the date text boxes
- Select the review period that this assignment falls under from the Review Period drop down box
- If available, select the review date and discussion date. If unavailable at this time; leave these fields blank

Step 2: Assign resources to the job

Job Details



JOB DETAILS


RESOURCES

Assigned Resources

Add Resource

Resource Name	Primary Manager	Secondary Manager	


SAVE CHANGES

- Click the “Add Resource” button to add a trainee onto the assignment
- Set the primary manager
- Set the secondary manager (if applicable)

Step 3: Save the information

When you are finished setting up the job information, click the “Save Details” tab and then click “Save”. An email notification will be sent to all assigned resources, containing a URL that can be followed to access this specific assignment directly. After the save is complete, you will then be redirected to the Job register, where you will see all the jobs where you are assigned (as either manager or trainee).

Job Details


JOB DETAILS


RESOURCES


SAVE CHANGES


Save Changes

Save

4. View Job Allocations

After logging in to the system, the default view is a register displaying all jobs that you have been allocated to as either the trainee or the manager. You can also access this view by clicking the Jobs → Job Listing menu option.

The register shows all the jobs that you have been assigned to.


System Admin [Log Out](#)

e-Tracks

Jobs
ANA
Reports
Administration
Help

Job Name	Start Date	End Date	Hours	Status	Edit
Mondi SA [7]	09 Jun 2013	15 Jun 2013	40	Signed Off	Edit
Mineworkers Investment Comp	18 May 2013	08 Jun 2013	120	In Progress	Edit
Mondi SA [5]	26 Apr 2013	17 May 2013	128	Not Started	Edit
Associated Motor Holdings [4]	04 Apr 2013	25 Apr 2013	128	Not Started	Edit
Capricorn	13 Mar 2013	03 Apr 2013	128	Not Started	Edit
Dauphin Himan Design	13 Mar 2013	03 Apr 2013	0	In Review	Edit
Associated Motor Holdings	19 Feb 2013	12 Mar 2013	128	Not Started	Edit
Associated Motor Holdings [1]	28 Jan 2013	18 Feb 2013	128	Signed Off	Edit
Unitrans Freight [3]	14 Jan 2013	14 Jan 2013	0	In Review	Edit
Sappi HO	14 Jan 2013	14 Jan 2013	0	Not Started	Edit

Records per page: 10
Records: 1 - 10 of 12 - Pages: 1 2

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5. Submit Performance Review (PR) and Performance Analysis (PA) per job

Once you have been assigned to a job, you will need to submit your Performance Review and Performance analysis within two weeks of the due date. Email reminders will be sent to remind you to update your PA and PR for this assignment.

To access the PR and PA screens, either follow the URL in the reminder emails or click the “Edit” link to the right of the job in the job listing register:

The screenshot shows the Deloitte e-Tracks system interface. At the top, there is a blue header with the Deloitte logo and a 'System Admin Log Out' link. Below the header, the 'e-Tracks' title is displayed. A navigation bar contains links for Jobs, ANA, Reports, Administration, and Help. The main content area features a table with job listings. The table has columns for Job Name, Start Date, End Date, Hours, Status, and Edit. The 'Edit' column contains blue links for each job. The 'Associated Motor Holdings [4]' row has its 'Edit' link circled in blue. At the bottom of the table, there is a 'Records per page' dropdown set to 10 and a pagination bar showing 'Records: 1 - 10 of 12 - Pages: 1 2'. A copyright notice at the bottom right reads 'Copyright ©2012 Deloitte Touche Tohmatsu. All rights reserved.'

Job Name	Start Date	End Date	Hours	Status	Edit
Mondi SA [7]	09 Jun 2013	15 Jun 2013	40	Signed Off	Edit
Mineworkers Investment Comp	18 May 2013	08 Jun 2013	120	In Progress	Edit
Mondi SA [5]	26 Apr 2013	17 May 2013	128	Not Started	Edit
Associated Motor Holdings [4]	04 Apr 2013	25 Apr 2013	128	Not Started	Edit
Capricorn	13 Mar 2013	03 Apr 2013	128	Not Started	Edit
Dauphin Himan Design	13 Mar 2013	03 Apr 2013	0	In Review	Edit
Associated Motor Holdings	19 Feb 2013	12 Mar 2013	128	Not Started	Edit
Associated Motor Holdings [1]	28 Jan 2013	18 Feb 2013	128	Signed Off	Edit
Unitrans Freight [3]	14 Jan 2013	14 Jan 2013	0	In Review	Edit
Sappi HO	14 Jan 2013	14 Jan 2013	0	Not Started	Edit

a) Submit Performance Review (PR)

Step 1:

Once you have accessed the Job Edit screen, to access the PR for this assignment, click the “PR” menu button as highlighted below:

The screenshot shows the Deloitte e-Tracks interface. At the top, there's a navigation bar with 'Jobs', 'AIA', and 'Reports'. Below this, a sub-navigation bar has 'Job Details' and 'PR'. The 'PR' button is highlighted in green. The main content area is titled 'Job Details' and contains a form with the following fields:

- Job Name (Client): Associated Motor Holdings [4]
- Start Date: 2013/04/04
- Estimated End Date: 2013/04/25
- Review Period: 2012/2013 - Mid year
- Hours: 420

Step 2:

For each competency listed, rate yourself and provide a comment by clicking the “Edit” button to the right of the competency:

Level	Ach.	Competency	Cor.	Trainee S	Trainee Comment	Manager S	Manager Comment
Category: PROFESSIONAL SKILLS REVIEW							
Subcategory: PROFESSIONAL SKILLS REVIEW							
Assistant	<input type="checkbox"/>	Identifies critical factors in the economic, social, legislative, regulatory and political environment that impacts on business and financial decisions of an entity	<input checked="" type="checkbox"/>	-		-	Edit

Select a score from the drop down list under the “Trainee Section” and provide a comment, and then click “Save”

The screenshot shows the 'Trainee Section' and 'Manager Section' of the performance review form. The 'Trainee Section' has a 'Trainee Score' dropdown menu with '3B' selected and a text area for 'Trainee Comment' containing 'xxxxxx'. The 'Manager Section' has a 'Manager Score' dropdown menu and a text area for 'Manager Comment'. At the bottom, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red circle.

The PR grid will then be refreshed with your new score and comment:

Subcategory: PROFESSIONAL SKILLS REVIEW								
Assistant	<input type="checkbox"/>	Identifies critical factors in the economic, social, legislative, regulatory and political environment that impacts on business and financial decisions of an entity	<input checked="" type="checkbox"/>	3B	XXXXX	-		Edit

Repeat this process for all competencies. Note you can change how many items show in the grid and view the next page of information by using the controls on the bottom of the grid:



***Note: The “Achieved” column is based on the manager score and not on the trainee score. Therefore this column will only reflect a “tick” once the manager has scored the trainee and the manager rating is greater than or equal to the required score.**

b) Performance Analysis (PA)

Step 1:

Once you have accessed the Job Edit screen, to access the PA for this assignment, click the “PA” menu button as highlighted below:

The screenshot displays the Deloitte e-Tracks Performance Analysis (PA) interface. At the top, the Deloitte logo is on the left, and 'System Admin Log Out' is on the right. Below this is a navigation bar with 'Jobs', 'ANA', 'Reports', 'Administration', and 'Help'. A secondary bar shows 'Job Details', 'PR', and 'PA' (highlighted in green). The main content area is titled 'Performance Analysis' and includes a section 'Associated Motor Holdings [4]'. This section contains two large text input boxes: 'Demonstrated areas of strength:' and 'Identified areas of improvement:'. A 'Save PA' button is located at the bottom left of the screen.

Step 2:

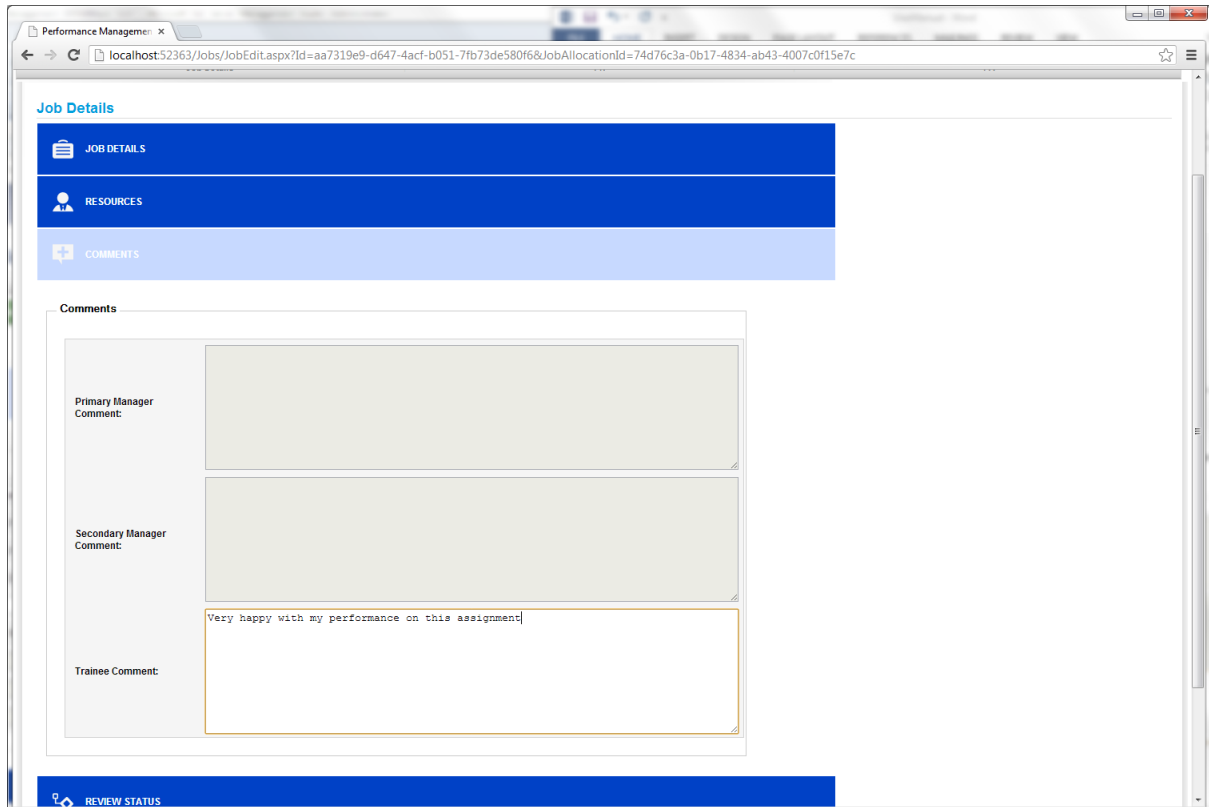
Fill in the “Demonstrated areas of strength” text box and the “Identified areas of improvement” text box. When you are happy with your data, click the “Save” button at the bottom of the screen.

6. Submitting the PA and the PR

After the PA and PR have been completed, you can submit the assignment for review.

Step 1:

On the “Job Details” tab, click on Comments and fill in the Trainee comment text box, giving an overall comment on your performance on this assignment:



The screenshot shows a web browser window with the URL `localhost:52363/Jobs/JobEdit.aspx?Id=aa7319e9-d647-4acf-b051-7fb73de580f6&JobAllocationId=74d76c3a-0b17-4834-ab43-4007c0f15e7c`. The page is titled "Job Details" and has a sidebar with three tabs: "JOB DETAILS", "RESOURCES", and "COMMENTS". The "COMMENTS" tab is selected. The main content area shows a "Comments" section with three text boxes: "Primary Manager Comment:", "Secondary Manager Comment:", and "Trainee Comment:". The "Trainee Comment:" box contains the text "Very happy with my performance on this assignment". At the bottom of the page, there is a blue bar with the text "REVIEW STATUS".

Step 3:

Click Review Status, and then click the “Submit to manager” button:

Deloitte. System Admin [Log Out](#)

e-Tracks

Jobs AIA Reports Administration Help

Job Details PR PA

Job Details

- JOB DETAILS
- RESOURCES
- COMMENTS
- REVIEW STATUS

Change Review Status

Mark as started **Submit to manager**

SAVE CHANGES

Step 4:

Click “Save Changes and click “Save”:

Job Details

- JOB DETAILS
- RESOURCES
- COMMENTS
- REVIEW STATUS
- SAVE CHANGES

Save Changes

Save

The job will now be in the “In review” status and the manager will be sent an email to review the data.

7. Signing off the Job


Once your mentor has scored the PR and submitted their PA comments; the job will either be sent back to you for corrections or it will be sent back to you in the “Final Discussion” status.

If it is sent back for corrections; you would update the PR / PA as necessary and submit to manager as discussed above.






Otherwise, if the job is in the “Final Discussion” status, the next step is to sign off.

Step 1:

Ensure the review date and discussion date have been set

 **JOB DETAILS**


Job Details


Job Name (Client):	<input type="text" value="FirstRand"/>		
Start Date:	<input type="text" value="2013/04/04"/>		
Estimated End Date:	<input type="text" value="2013/04/25"/>		
Review Period:	<input type="text" value="2012/2013 - Mid year"/> ▼		
Hours:	<input type="text" value="128"/>		
Current Review Status:	<input type="text" value="Final Discussion"/>		
Review Date:	<input type="text" value="12/01/2013"/>		
Discussion Date:	<input type="text" value="20/02/2013"/>		
Sign off Date:	<input type="text"/>		


Step 2:


Expand “Review Status” and click “Mark as signed off”

Job Details

 JOB DETAILS

 RESOURCES

 COMMENTS

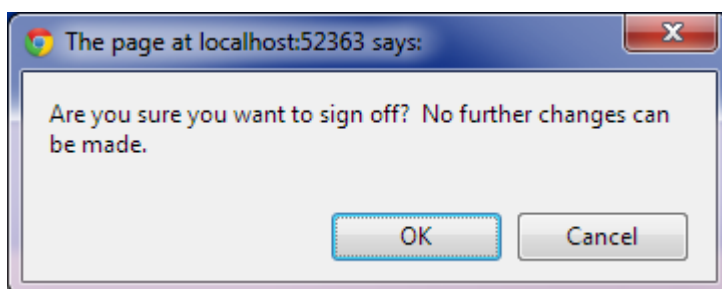
 REVIEW STATUS

Change Review Status

Mark as Signed Off

 SAVE CHANGES






Press "OK" on the notification:



Step 3:

Click "Save"

Job Details

	JOB DETAILS
	RESOURCES
	COMMENTS
	REVIEW STATUS
	SAVE CHANGES

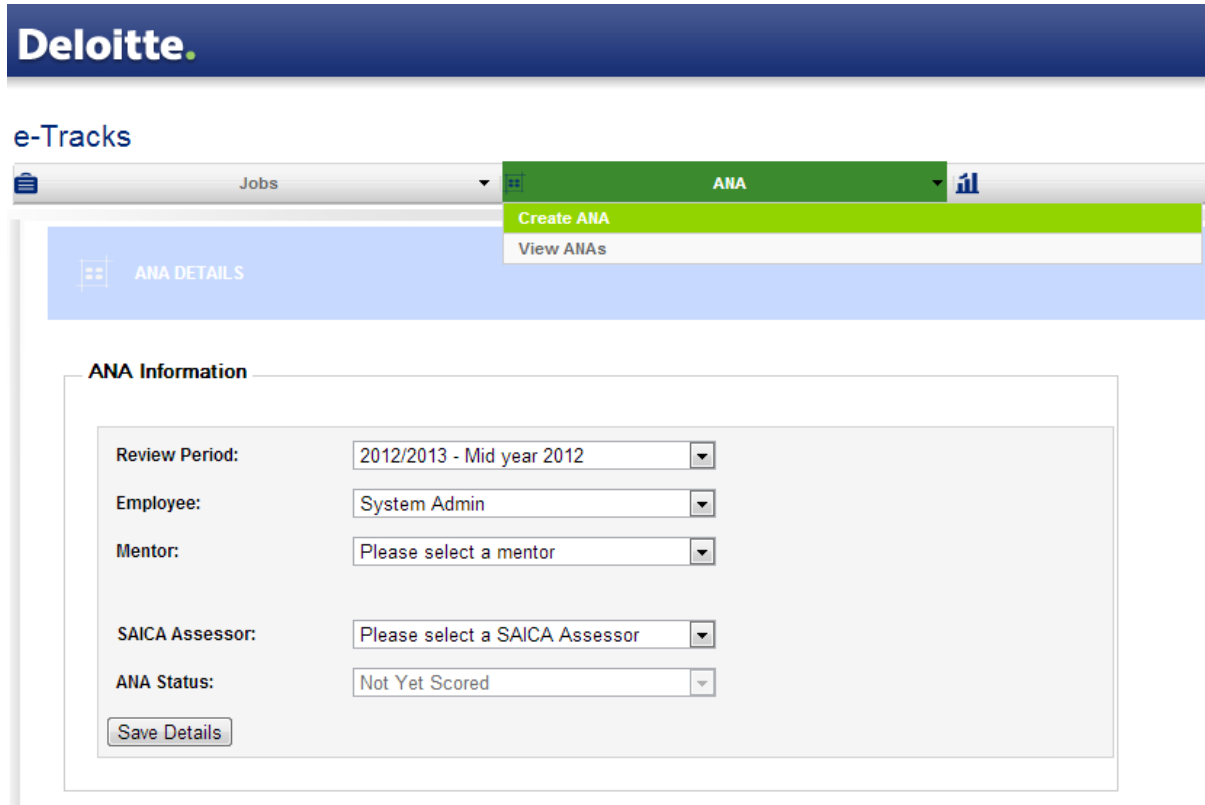
Save Changes



8. Create an ANA

Twice a year you will be required to create an ANA.

To create an ANA, click on the ANA → Create ANA menu option as highlighted below:



The screenshot shows the Deloitte e-Tracks interface. At the top, there is a navigation bar with 'Jobs' and 'ANA' menus. The 'ANA' menu is open, showing 'Create ANA' (highlighted in green) and 'View ANAs'. Below the navigation bar, there is a section titled 'ANA DETAILS'. Under this section, there is a form titled 'ANA Information'. The form contains the following fields:

- Review Period: 2012/2013 - Mid year 2012
- Employee: System Admin
- Mentor: Please select a mentor
- SAICA Assessor: Please select a SAICA Assessor
- ANA Status: Not Yet Scored

At the bottom of the form, there is a 'Save Details' button.

Step 1:

- Select the review period that this ANA is applicable to (Note: You can only have one ANA per review period per Employee).
- Your name will be selected under the “Employee” drop down by default. If you are creating an ANA for another trainee, select that user from the employee drop down.
- Select your mentor that will be assessing this ANA
- Select the SAICA accredited assessor from the SAICA Assessor drop down.

Step 2:

Click “Save” to create the ANA.

After being successfully saved, you will be redirected to the ANA register.

9. View ANA Register

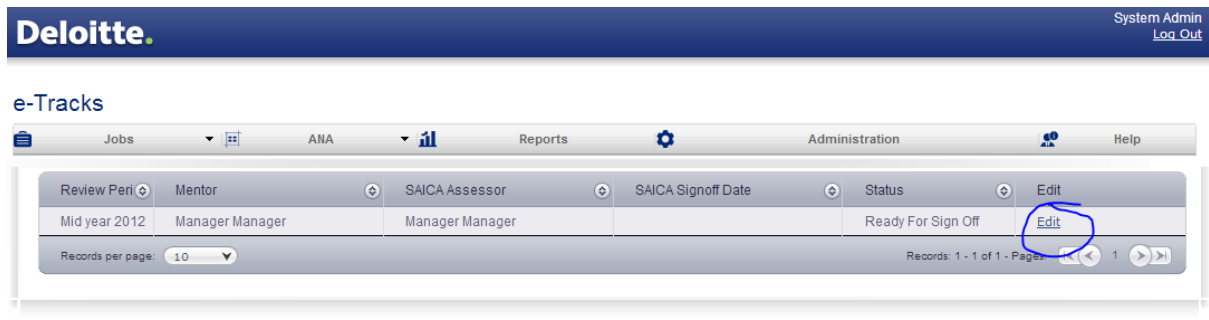
To view the ANA register which shows all the ANAs you have been assigned to; click the ANA → View ANA menu item:

The screenshot shows the Deloitte e-Tracks application interface. At the top is a dark blue header with the Deloitte logo. Below the header, the text "e-Tracks" is displayed. The main navigation bar includes a "Jobs" dropdown menu, a green "ANA" dropdown menu with a bar chart icon, and a "Reports" link. The "ANA" dropdown menu is open, showing two options: "Create ANA" and "View ANAs", with "View ANAs" highlighted in green. Below the navigation bar, there are input fields for "Review Period" (set to "Mid year 2012") and "Mentor" (set to "Manager Manager"). A "Records per page" dropdown is set to "10".

10. Add Trainee Comment for ANA

Step 1:

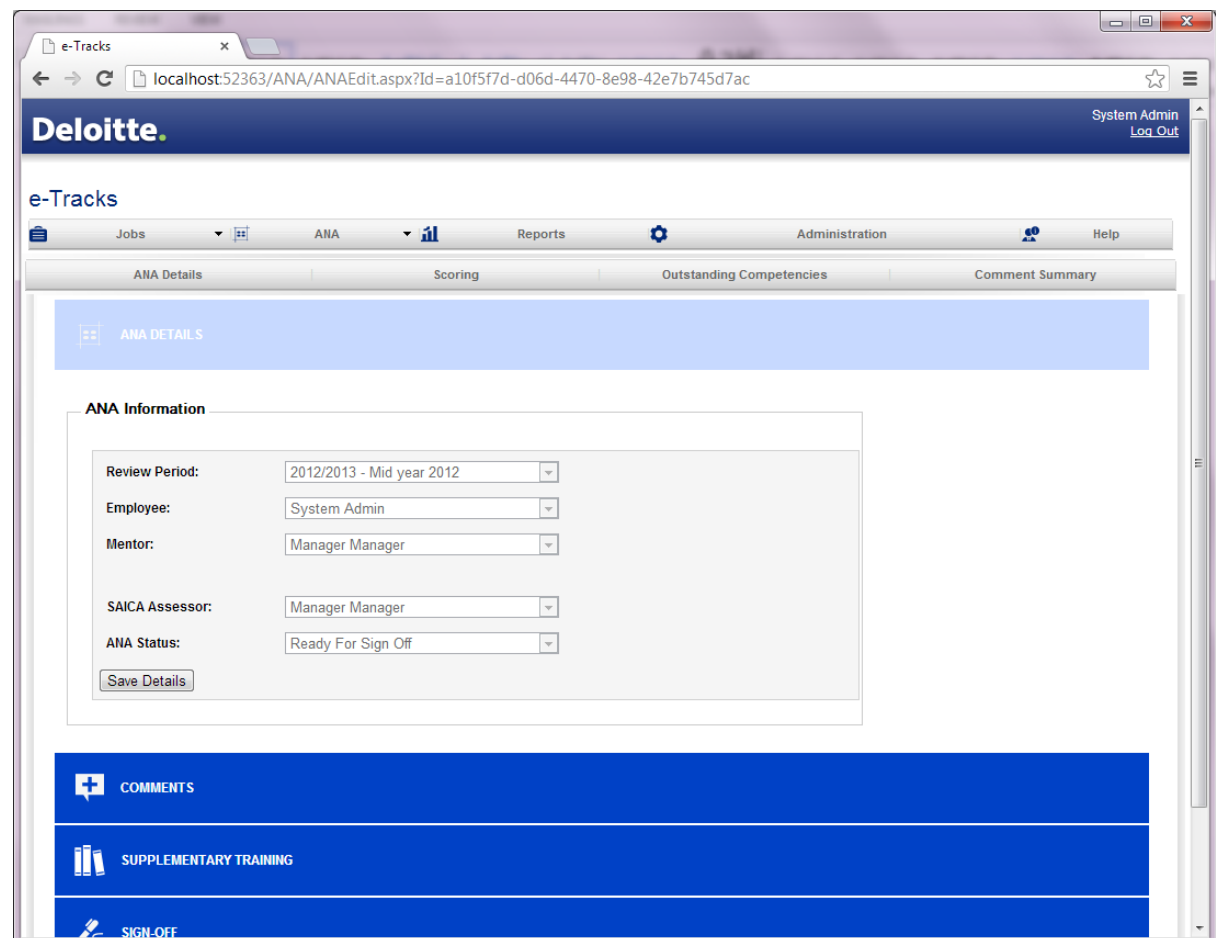
To add your comment within the ANA, click the “Edit” link to the right of the ANA on the ANA register:



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Step 2:

Click the “ANA Details” menu item



Step 3:

Click “Comments” and fill in the “Trainee Comment” text box

Comments

Assessor Comment:	
Trainee Comment:	I have enjoyed the last six months at Deloitte and it has been a very good learning experience.
<input type="button" value="Submit Comments"/>	

Click “Submit Comments”.

11. Fill in supplementary information

Step 1:

Click the “Supplimentary Learning” tab.

Step 2:

Fill in all the fields

The screenshot shows a web interface with three tabs: 'ANA DETAILS', 'COMMENTS', and 'SUPPLEMENTARY TRAINING'. The 'SUPPLEMENTARY TRAINING' tab is selected and highlighted in light blue. Below the tabs, the 'Supplementary Training' section is visible, containing three text input fields. Each field is preceded by a label: 'Technical Learning:', 'Academic Learning:', and 'Future Training Opportunities:'. Each input field contains the placeholder text 'XXX'.

Supplementary Training	
Technical Learning:	XXX
Academic Learning:	XXX
Future Training Opportunities:	XXX

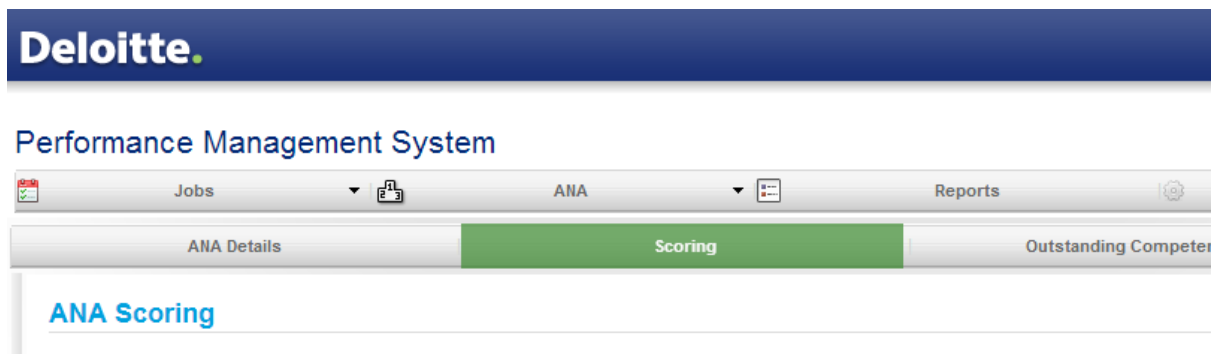
Step 3:

Click “Submit Comments”

Future Goals:	<div>asd</div>
	<div>asd</div>
Major assignments in next 6 months:	
<div>Submit Comments</div>	

12. View ANA Scoring

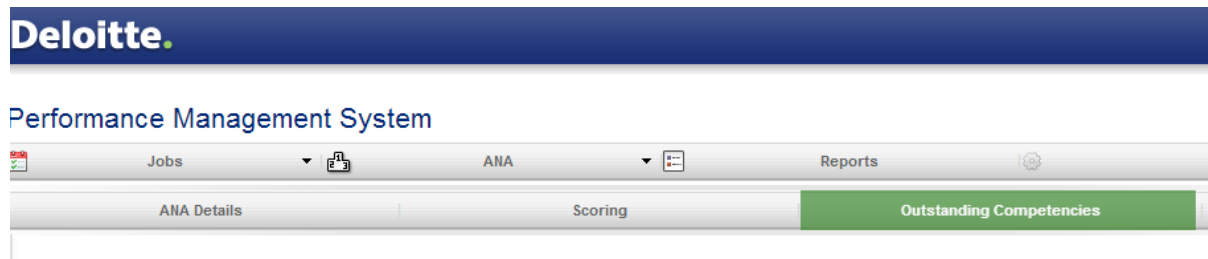
To view your ANA Scoring, click the “Scoring” menu item.



You can view your mentor's score per competency in the grid that is displayed on the screen. As a trainee you do not have access to update the scores or the action plans.

13. View Outstanding Competencies

To view all competencies that have not been achieved in this ANA, click the “Outstanding Competencies” menu item.



A grid will be displayed with all competencies that were not achieved in this review period.

Summary

Total number of competencies:	31
Achieved competencies:	4
Failed competencies:	25
Outstanding competencies:	2

Failed Competencies

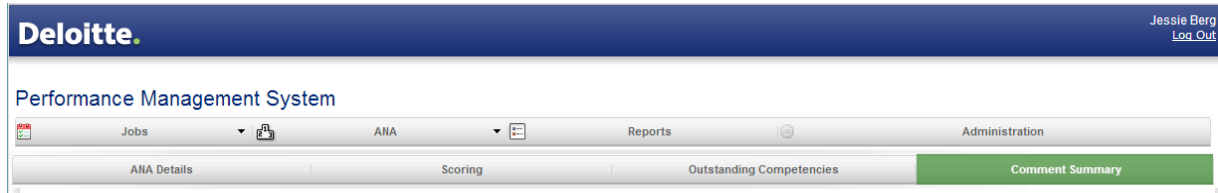
☒ Failed Competencies ☐ Outstanding Competencies

Competency	Description	Required Score	Final Score
Evaluate the results of the substantive analytical review procedures and conclude on whether (and where) more detailed audit testing is required.	Performance of audit procedures	3A	2B
Determination of sample sizes and methods of selection to obtain sufficient testing for the performance of tests of controls or the design and implementation of controls	Performance of test of controls Performance of D&I	3A	-
Preparation of specific report items identified from the performance of audit procedures, ensuring appropriate recommendations are made and obtaining responses from the appropriate level of management	Preparation of report items for inclusion in the management letter	3A	-
Perform and document the planned tests of internal control and identifies situations where follow up / extended work is	Performance of test of controls / D&I	3A	-

To view “Outstanding” competencies i.e. those that were scored with NOD (No Opportunity to Demonstrate), click the “Outstanding competencies” radio button.

14. View Comment Summary

To view a summary of all PA and PR comments within the period of review, click the “Comment Summary” menu item.



A list of all Jobs you were assigned to are displayed on the far left column, with a breakdown of all comments from the PA's for those jobs along the top.

The screenshot shows the 'Performance Analysis Summary' section of the Deloitte Performance Management System. The user is logged in as 'Jessie Berg - Mid year 2012'. There are two radio buttons: 'PA Comments' (selected) and 'PR Comments'. Below this is a table with the following columns: Job, Demonstrated areas of strength, Identified areas of improvement, Client Focus, Personal Impact Comments, Problem Solver Comment, and Flexibility / Ease of Performance Comment. The table contains data for several jobs, including Associated Motor Holdings, Mineworkers Investment Company, Unitrans Freight, Mondi SA Group Office, Bidvest-Sales Gauteng, and Capricorn.

Job	Demonstrated areas of strength	Identified areas of improvement	Client Focus	Personal Impact Comments	Problem Solver Comment	Flexibility / Ease of Performance Comment
Associated Motor Holdings	xzcfz	cxcCZXC	Jessie Berg: Test comment	Jessie Berg: Test comment Harry Carroll: Another comment	Jessie Berg: Test comment Harry Carroll: Another comment	Jessie Berg: Test comment
Mineworkers Investment Company	This is my demonstrated area of strength	These are my identified areas of improvement				
Unitrans Freight						
Mondi SA Group Office						
Bidvest-Sales Gauteng						
Capricorn	strength !!	weakness adadasdsad				

To view the PR comments, click the “PR comments” radio button. The grid will be updated to display all manager comments for each competency across each job.

Deloitte. Jessie Berg
10/15/2012

Performance Management System

Jobs | ABA | Reports | Administration

ABA Details | Scoring | Outstanding Competencies | Comment Summary

Performance Analysis Summary

Jessie Berg - Mid year 2012
☐ PA Comments ☒ PR Comments

Job	Competency	Comments
Associated Motor Holdings	Identify and communicate potential unlawful acts or omissions where there may be reason to believe that it may constitute a reportable irregularity.	
Mineworkers Investment Company	Identify and communicate potential unlawful acts or omissions where there may be reason to believe that it may constitute a reportable irregularity.	
Untrans Freight	Identify and communicate potential unlawful acts or omissions where there may be reason to believe that it may constitute a reportable irregularity.	

15. Sign-off the ANA

As a trainee you are required to sign-off your ANA.

When you have reviewed the scoring and filled in all your comments, and the ANA is in the “Ready for Sign-off” status, expand the “Sign off” tab.

Click the “Sign-off” button.



The screenshot shows a vertical stack of four tabs. The first three tabs are dark blue with white text and icons: 'ANA DETAILS' (with a grid icon), 'COMMENTS' (with a plus icon), and 'SUPPLEMENTARY TRAINING' (with a book icon). The fourth tab, 'SIGN-OFF', is light blue with a darker blue text and a pencil icon.

Trainee Sign Off

Trainee:

Sign-off date:

Mentor Sign Off

Mentor:

Sign-off date:

SAICA Sign Off

SAICA Assessor:

Sign-off date:

Password: