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**:**

Step 2:

Enter your details in the form and then click "Create User"

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

2. Log in

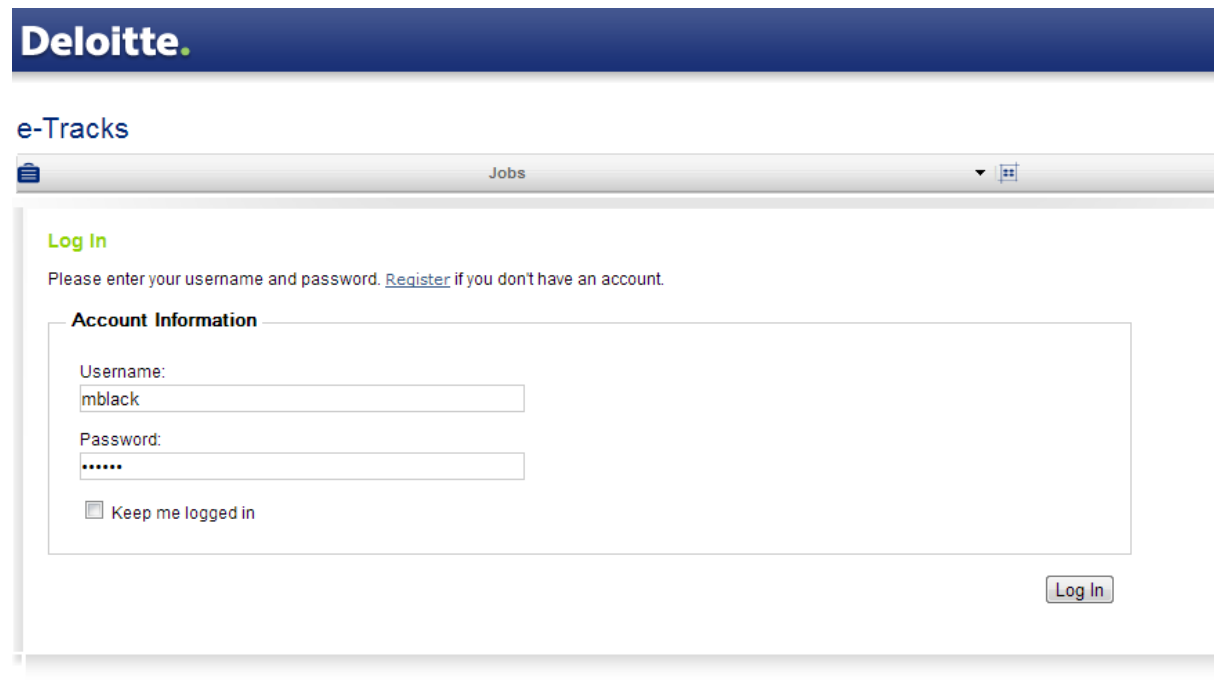**Step 3 (this will be the starting point using the system going forward):**

Log into the system using your Deloitte user name and password and click "Log in".
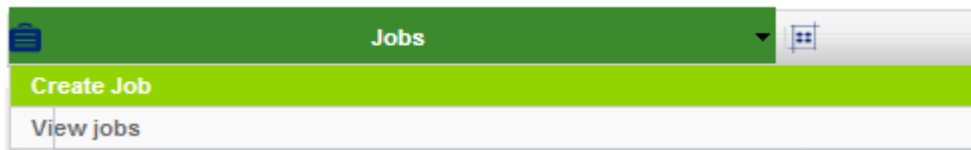
3. Create a Job (Assignment)

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

- 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

- 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).

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.

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

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:

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:

Step 2:

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

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

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

Subcategory: PROFESSIONAL SKILLS REVIEW								
Assistant	☐	Identifies critical factors in the economic, social, legislative, regulatory and political environment that impacts on business and financial decisions of an entity	☑	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:

| Records per page: 10 ▼ | | Show Filter - Records: 1 - 10 of 31 - Pages: |◄ ◄ 1 2 3 4 ► ►| |

*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:
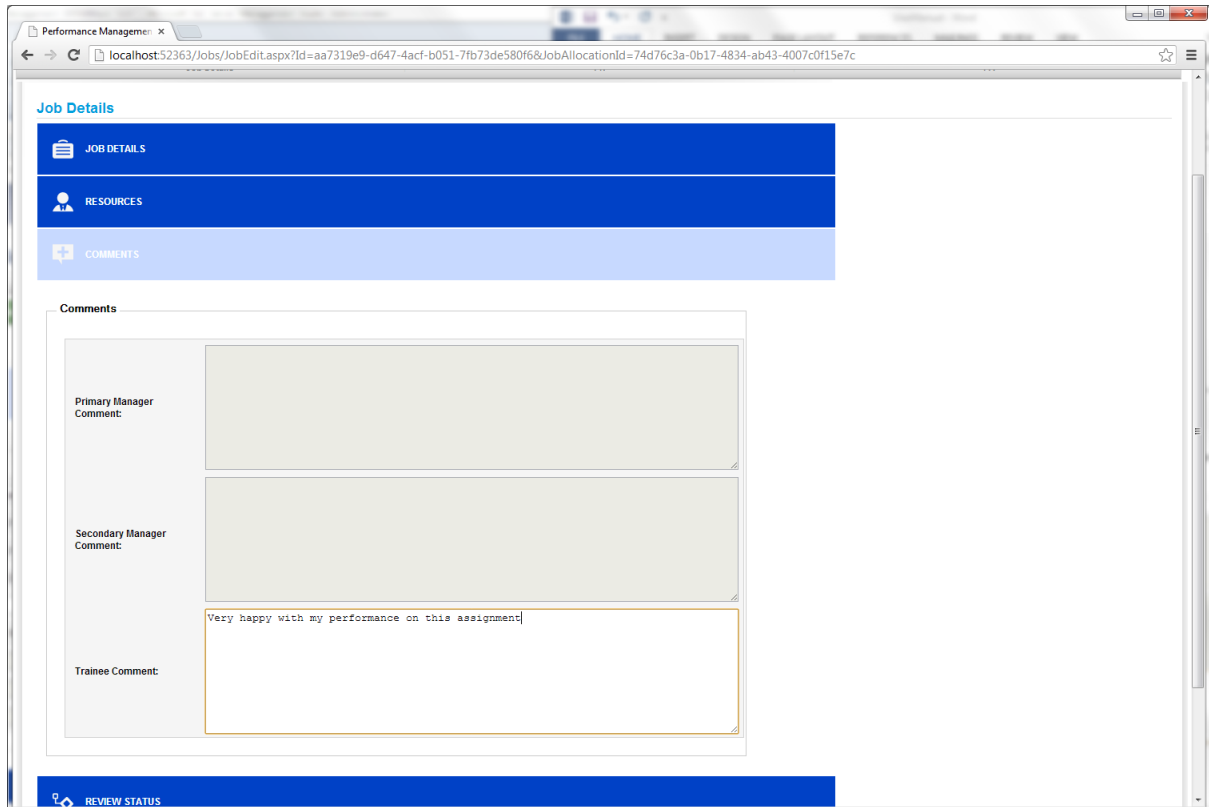

Step 2:

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:

Step 3:

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

Step 4:

Click "Save Changes and click "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

Step 2:

Expand "Review Status" and click "Mark as signed off"

Press "OK" on the notification:
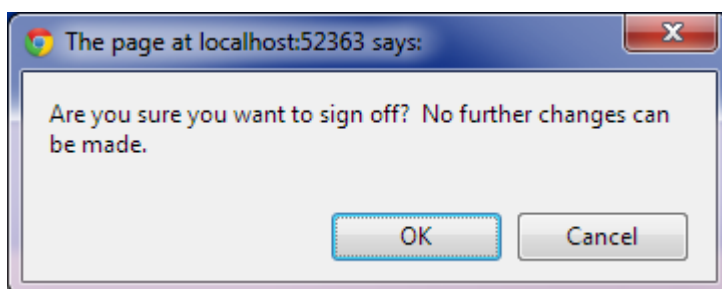
Step 3:

Click "Save"

Job Details

Job Details

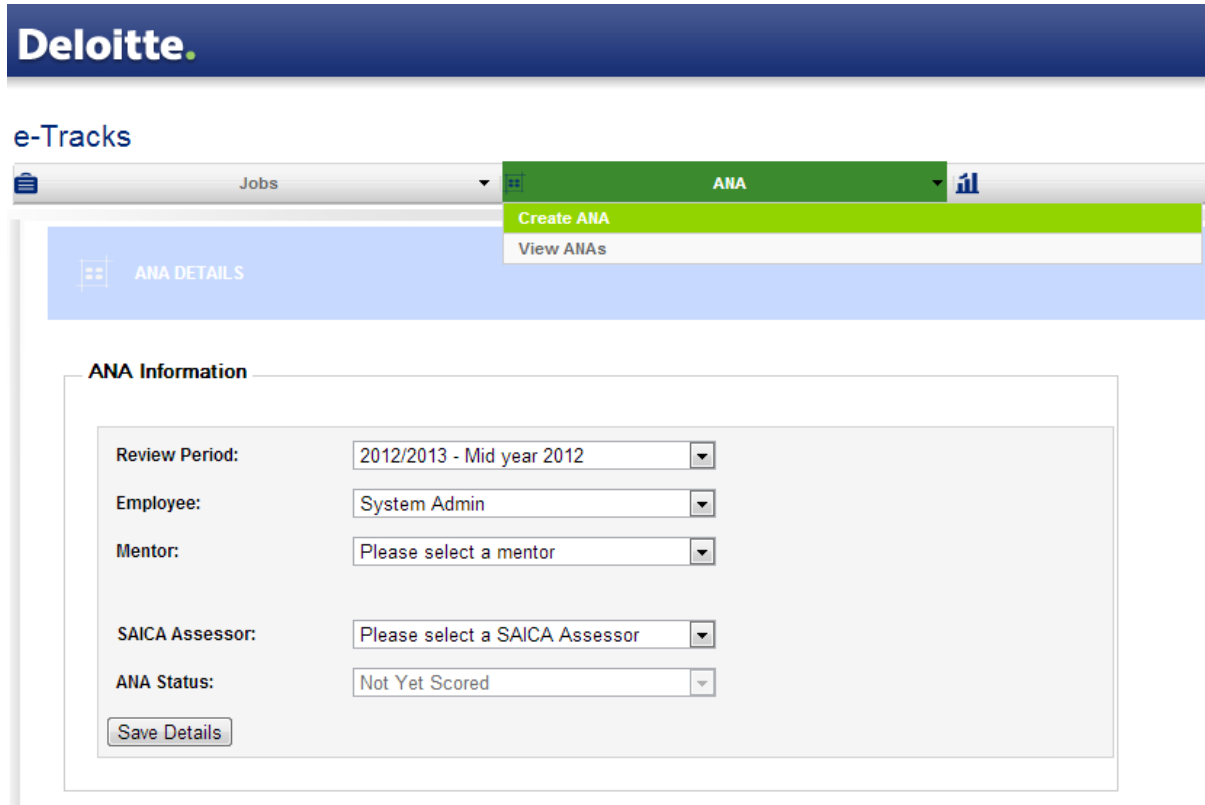|	
📋	**JOB DETAILS**
👤	**RESOURCES**
💬	**COMMENTS**
◇	**REVIEW STATUS**
💾	**SAVE CHANGES**

Save Changes

Save

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:

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.
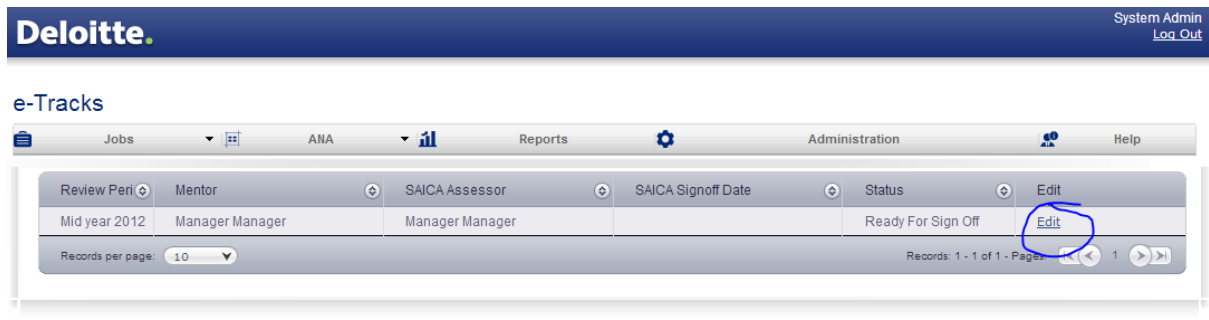
9. View ANA Register

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

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:

Step 2:

Click the "ANA Details" menu item
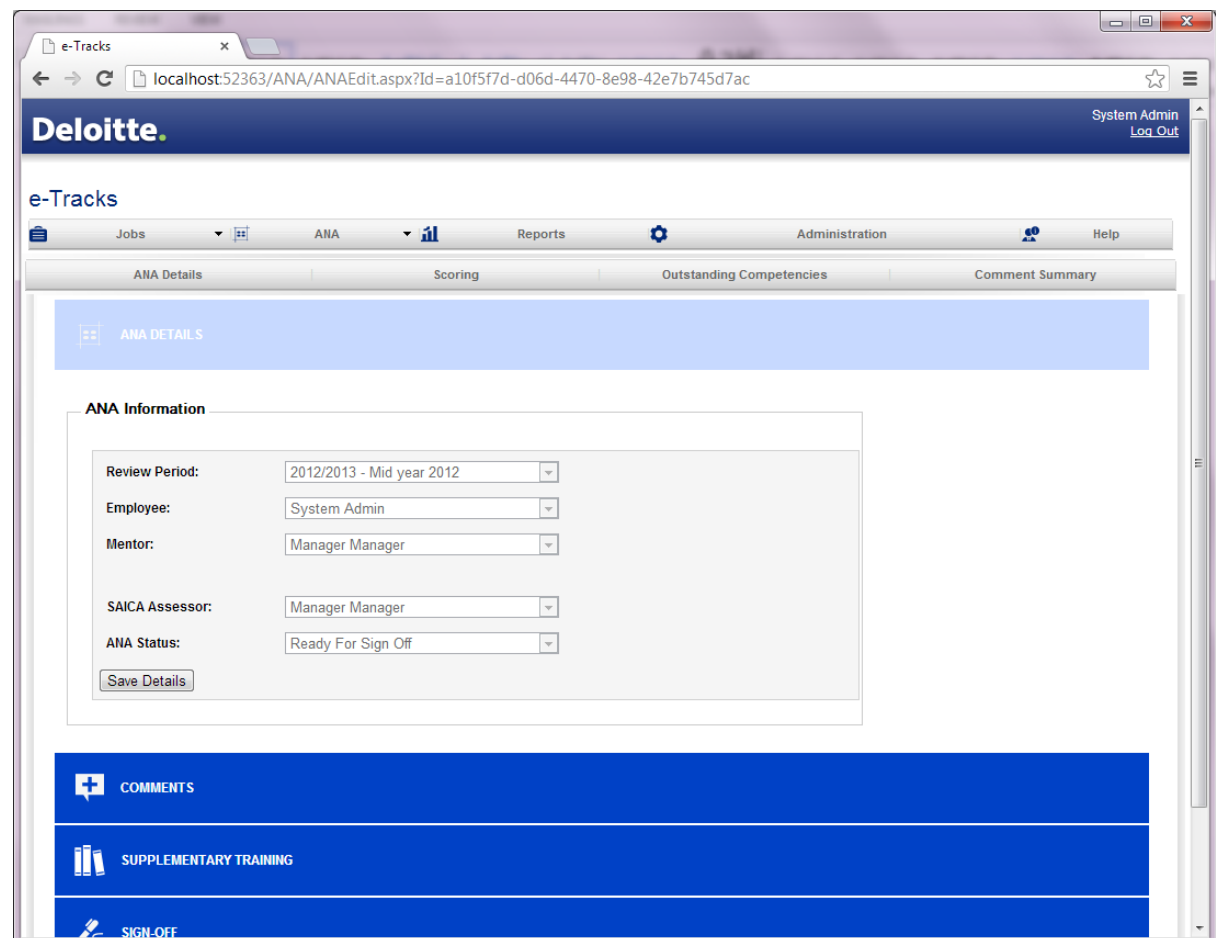
Step 3:

Click "Comments" and fill in the "Trainee Comment" text box

Click "Submit Comments".

11. Fill in supplementary information

Step 1:

Click the "Supplimentary Learning" tab.

Step 2:
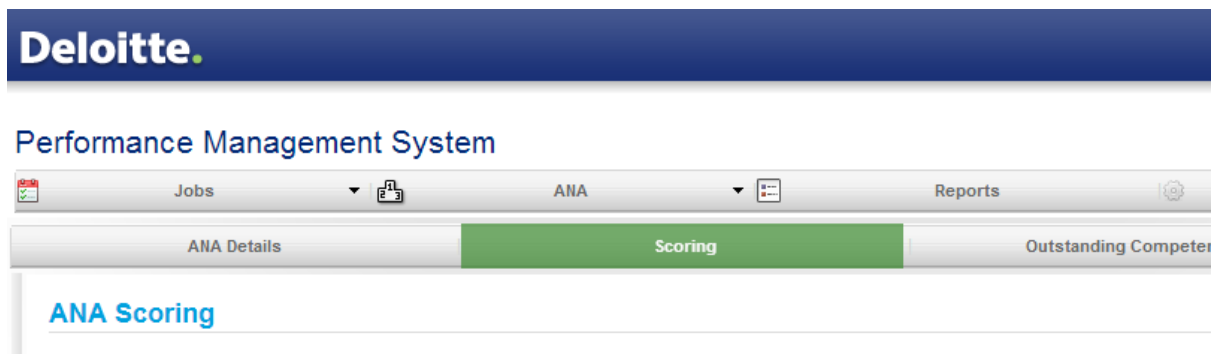
Fill in all the fields

Step 3:

Click "Submit Comments"

Future Goals:

asd

Major assignments in next 6 months:

asd

Submit Comments

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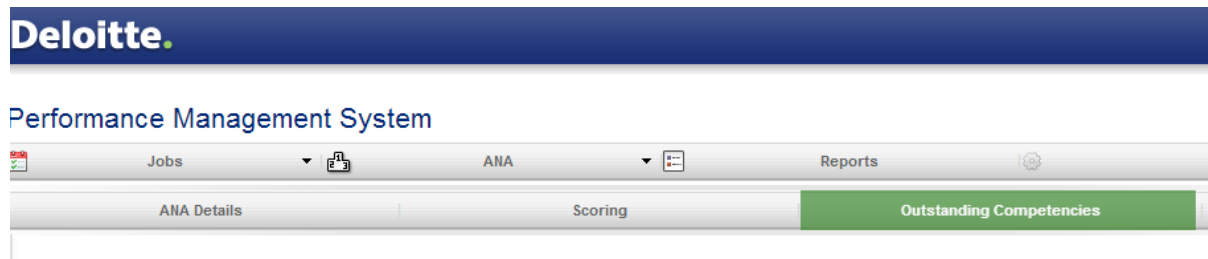
A grid will be displayed with all competencies that were not achieved in this review period.

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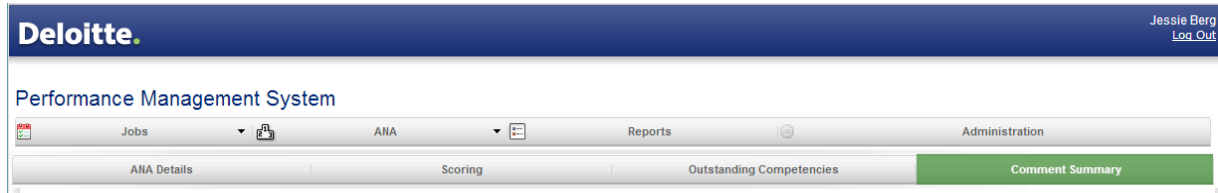
A list of all Jobs you were assigned to are displayed on the far left column, with a breakdown of all comments from the PA's for those jobs along the top.

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.

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.