XXXX Coaching App User Manual

# Trainee

When you've logged in to the app, you should see three buttons at the top of the screen, labeled “Account”, “Dashboard” and “Feedback”. These each lead to a different page.

## Account

This is where you will find your personal information (Name, address, city) and login details.

### Change personal information

If you want to put in a request to change your personal information, press the pencil button in the upper left part of the screen, then edit your information to what you want it to be and press the button again.

The change will only take effect when it is approved by a HR representative of your organization, after which you will be able to see the new information the next time you log in.

### Change password

In order to change your password, first press the “Change Password” button on the bottom of the screen. After pressing it, you should see 3 fields to put in passwords.

In the first one, labeled “Current password”, type your current password.

In the second, labeled “New password”, the password you'd like to change it to.

In the third, labeled “Confirm password”, re-type your new password to make sure you typed it correctly.

Once you've filled in all three fields, press “Confirm” to confirm your password change.

Don't forget to change your password the first time you log in.

## Dashboard

This is the main page of the app. Most of its features will be found here.

### Viewing Skills

On the left side of the screen is a list with all the skills associated with your account. You can click on them to bring up the overview screen of that skill in the middle of the screen. The overview screen will show all relevant details of the skill and allow you to edit them. If the skill in question has a certificate, clicking on its filename will allow you to download it. Pressing the X button below the information will delete the skill. Be careful, because deleting skills cannot be reversed.

### Editing Skills

In order to edit a skill, press the pencil button in the top right part of the overview screen. This should allow you to edit everything about the skill. After you're done editing, press the button again to confirm the changes.

### Adding Skills

To add a skill, use the section in the top right labeled “Add new Skill”. Type the name of the desired skill in the text field, select whether it is a hard or soft skill and press the button to add the new skill, which should appear in the list of skills right away. Do not forget to add in the learning goals by editing the skill after creating it!

### Asking for Feedback

This app supports asking your fellow trainees for 360° feedback. In order to do so, type in a fellow trainee's e-mail address in the text field of the “Ask for 360° feedback” section, and press the “Submit Query” button. This will send an invitation out to the specified trainee to give you feedback. For information on how to give and view this feedback, refer to the “Feedback” section of this manual.

### Viewing planned Meetings

If your coach or manager invites you to an evaluation meeting using this app, it will show up under the “Meetings” section of your dashboard.

## Feedback

This page deals with the giving and receiving of 360° feedback.

### Giving feedback

The list labeled “Requested feedback” on the left side of the screen contains everyone who has asked you for feedback. Click on a name to select it, then type your feedback in the text field and press the button to save it.

### Receiving feedback

The list labeled “Received feedback” on the right will show everyone who has given you feedback. To view someone's feedback, click on their name to select them and the feedback will be shown on the screen.

# Coach

When you've logged in to the app, you should see two buttons at the top of the screen, labeled “Account” and “Dashboard”. These each lead to a different page.

## Account

This is where you will find your personal information (Name, address, city) and login details.

### Change personal information

If you want to put in a request to change your personal information, press the pencil button in the upper left part of the screen, then edit your information to what you want it to be and press the button again.

The change will only take effect when it is approved by a HR representative of your organization, after which you will be able to see the new information the next time you log in.

### Change password

In order to change your password, first press the “Change Password” button on the bottom of the screen. After pressing it, you should see 3 fields to put in passwords.

In the first one, labeled “Current password”, type your current password.

In the second, labeled “New password”, the password you'd like to change it to.

In the third, labeled “Confirm password”, re-type your new password to make sure you typed it correctly.

Once you've filled in all three fields, press “Confirm” to confirm your password change.

Don't forget to change your password the first time you log in.

## Dashboard

This is the main page of the app. Most of its features will be found here.

### View Trainees

On the left side of the screen, you will see a list of all trainees assigned to you. Click on them to select them.

### Viewing Skills

On the left side of the screen is a list with all the skills associated with the selected trainee. You can click on them to bring up the overview screen of that skill in the middle of the screen. The overview screen will show all relevant details of the skill and allow you to edit them. If the skill in question has a certificate, clicking on its filename will allow you to download it. Pressing the X button below the information will delete the skill. Be careful, because deleting skills cannot be reversed.

### Editing Skills

In order to edit a skill, press the pencil button in the top right part of the overview screen. This should allow you to edit everything about the skill. After you're done editing, press the button again to confirm the changes.

### Adding Skills

To add a skill to the selected trainee, use the section in the top right labeled “Add new Skill”. Type the name of the desired skill in the text field, select whether it is a hard or soft skill and press the button to add the new skill, which should appear in the list of skills right away. Do not forget to add in the learning goals by editing the skill after creating it!

### Planning Meetings

To plan an evaluation meeting with the selected trainee, select the time, date and duration of the meeting under the “Plan evaluation meeting” section, then press the “Plan meeting” button to confirm. An email will be sent to the trainee, informing them of the meeting.

### Viewing Meetings

Under the “Meetings” section, you will find information about all future meetings that include you, no matter with which trainee they are.

# Manager

When you've logged in to the app, you should see two buttons at the top of the screen, labeled “Account” and “Dashboard”. These each lead to a different page.

## Account

This is where you will find your personal information (Name, address, city) and login details.

### Change personal information

If you want to put in a request to change your personal information, press the pencil button in the upper left part of the screen, then edit your information to what you want it to be and press the button again.

The change will only take effect when it is approved by a HR representative of your organization, after which you will be able to see the new information the next time you log in.

### Change password

In order to change your password, first press the “Change Password” button on the bottom of the screen. After pressing it, you should see 3 fields to put in passwords.

In the first one, labeled “Current password”, type your current password.

In the second, labeled “New password”, the password you'd like to change it to.

In the third, labeled “Confirm password”, re-type your new password to make sure you typed it correctly.

Once you've filled in all three fields, press “Confirm” to confirm your password change.

Don't forget to change your password the first time you log in.

## Dashboard

This is the main page of the app. Most of its features will be found here.

### View Trainees

On the left side of the screen, you will see a list of all trainees assigned to you. Click on them to select them.

### Viewing Skills

On the left side of the screen is a list with all the skills associated with the selected trainee. You can click on them to bring up the overview screen of that skill in the middle of the screen. The overview screen will show all relevant details of the skill. If the skill in question has a certificate, clicking on its filename will allow you to download it.

### Viewing Cats

We had some space left over on the dashboard, so we added a picture of some cute kittens. Enjoy it!

### Planning Meetings

To plan an evaluation meeting with the selected trainee, select the time, date and duration of the meeting under the “Plan evaluation meeting” section, then press the “Plan meeting” button to confirm. An email will be sent to the trainee, informing them of the meeting.

### Viewing Meetings

Under the “Meetings” section, you will find information about all future meetings that include you, no matter with which trainee they are.

# HR

When you've logged in to the app, you should see two buttons at the top of the screen, labeled “Account” and “Dashboard”. These each lead to a different page.

## Account

This is where you will find your personal information (Name, address, city) and login details.

### Change personal information

If you want to put in a request to change your personal information, press the pencil button in the upper left part of the screen, then edit your information to what you want it to be and press the button again.

The change will only take effect when it is approved by a HR representative of your organization, after which you will be able to see the new information the next time you log in. Since you're a HR representative yourself, you will be able to approve your own request using the method described below.

### Change password

In order to change your password, first press the “Change Password” button on the bottom of the screen. After pressing it, you should see 3 fields to put in passwords.

In the first one, labeled “Current password”, type your current password.

In the second, labeled “New password”, the password you'd like to change it to.

In the third, labeled “Confirm password”, re-type your new password to make sure you typed it correctly.

Once you've filled in all three fields, press “Confirm” to confirm your password change.

Don't forget to change your password the first time you log in.

## Dashboard

This is the main page of the app. Most of its features will be found here.

### Viewing People

On the left side of the screen, you will see a list of all people in the organization. Click on them to select them.

### Viewing Skills

On the left side of the screen is a list with all the skills associated with the selected person. You can click on them to bring up the overview screen of that skill in the middle of the screen. The overview screen will show all relevant details of the skill. If the skill in question has a certificate, clicking on its filename will allow you to download it.

### Viewing and Editing Personal Information

On the top right of the screen, the name, role, address and city of the selected person will be shown. If the person is a trainee, it will also show who their coach and manager are. Clicking on the pencil button will allow you to edit the name, address, city, coach and manager of the selected person, and pressing the button again will confirm the change. Note that for newly created coaches and managers to show up as options here, you should switch to the account page and back to the dashboard to refresh the lists.

### Confirming or Denying Change Requests

If the selected person has requested a change in name, address and/or city, it will be shown on the middle right side of the screen. You can simply press the “Confirm” button to confirm the change, or the “Deny” button to deny it. If you deny a request, you will be prompted to give a reason for denying it. This will be shown to the requester in an e-mail.

### Creating new Users

To create a new user, simply fill out all the required information in the “Create new person” section and press the “Create Person” button. An email will be sent to the new user with instructions for how to log in to their account.