
Coach Circle step by step manual

For coaches use


Rebel Duck Sp. z o.o.















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Start Client Settlements Logout Coach Circle 

Summary **Recent events** **Upcoming events**

	<p> 2013-06-27 13:29 - John Snow Set session results.</p>	<p> 2013-07-02 16:00 - Mateusz Wolski Upcoming session.</p>
	<p> 2013-06-27 13:17 - John Snow Filled homework.</p>	<p> 2013-07-03 09:00 - Mateusz Wolski Upcoming session.</p>
	<p> 2013-06-11 17:52 - Mateusz Wolski Set session results.</p>	<p> 2013-07-04 17:00 - John Snow Upcoming session.</p>
	<p> 2013-04-14 10:09 - Mateusz Wolski Set session results.</p>	<p> 2013-07-06 14:00 - Mateusz Wolski Upcoming session.</p>
	<p> 2013-03-23 16:11 - Mateusz Wolski Filled homework.</p>	
	<p> 2013-02-14 21:57 - Mateusz Wolski Answered survey.</p>	
	<p> 2013-02-14 21:56 - Mateusz Wolski Answered survey.</p>	
	<p> 2013-02-14 21:56 - Mateusz Wolski Set session results.</p>	

Send us your suggestions on contacy@coachcircle.net

Table of Contents

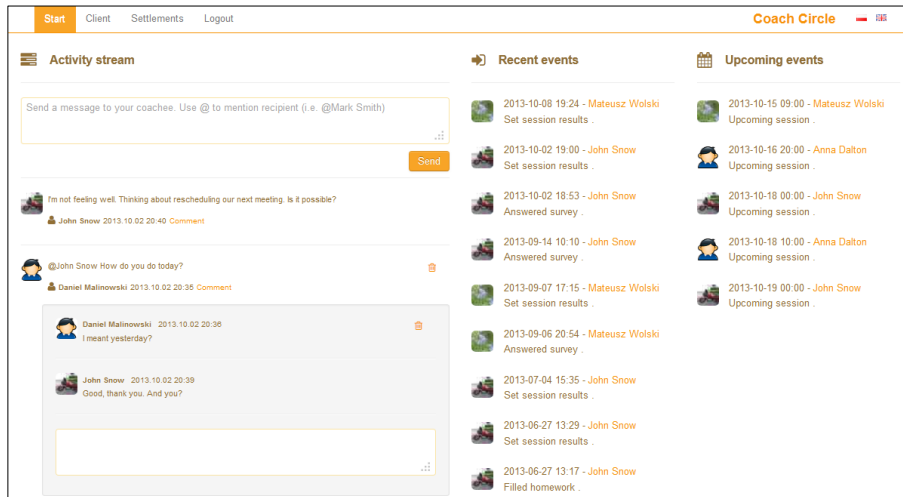
1. Introduction	3
2. Coach's dashboard and streaming.....	4
3. Creating new client	6
4. Creating and editing client's contract.....	8
5. Planning sessions calendar	10
6. Editing session details and generating report	13
7. Session details and client's involvement tracking	16
8. Editing client's session details.....	18
9. Managing surveys, creating and editing	19
10. Settlements.....	23
11. Change password	25

1. Introduction

Dear CoachCircle users, it is our pleasure to present you the training materials for CoachCircle online system. We hope that you will find the information in your daily work and that it will enable you to use our tool in more efficient way.

2. Coach's dashboard and streaming

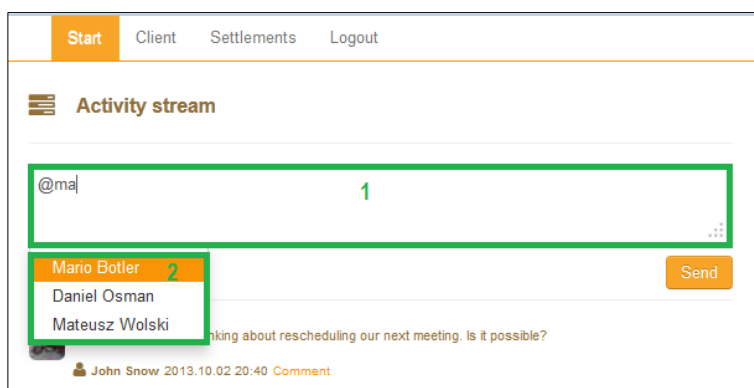
1. After logging into the system Coach dashboard is displayed.



This view shows important informatios grouped in three sections:

- Upcoming events – (right hand panel) list of upcoming sessions within next 7 days.
- Recent events – (central panel) list of recent clients activities like setting session result, answering survey or filling homework.
- Communication stream – (left panel) on-going discussion with coaches.

2. Click on client name in recent or upcoming events section to start working with the selected coache. One click will redirect you to appropriate client's details.



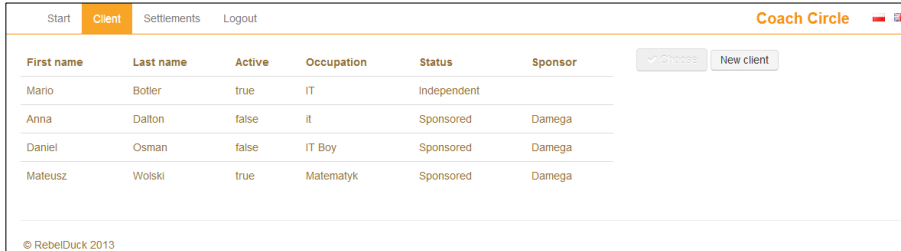
3. To start a new conversation in the communication stream start typing the client's name prefixed with a "@" symbol in the edit window (1). System will suggest and display a list of coaches with

matching the first or last name (2). To choose a customer click on the selected name or select the given row using up and down arrow keys and press "Enter". Continue with editing text and click 'Send' when finished. Your message will be instantly displayed in the Coache's application.

4. To response to one of your client's posts just click 'Comment' next to it, type the text and click 'Send' when finished.
5. User may delete topics/conversations or comments of which he is an author. To remove click on the small bin icon on the right hand of the discussion . Please remember that it is impossible to retrieve deleted posts/topics.

3. Creating new client

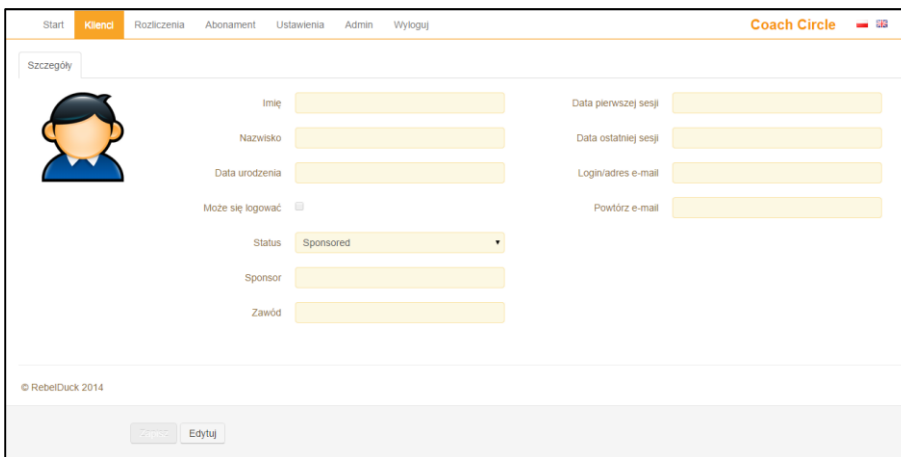
1. Select the 'Client' from the main menu. You will see a list of all your clients.



First name	Last name	Active	Occupation	Status	Sponsor
Mario	Botler	true	IT	Independent	
Anna	Dalton	false	it	Sponsored	Damega
Daniel	Osman	false	IT Boy	Sponsored	Damega
Mateusz	Wolski	true	Matematyk	Sponsored	Damega

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2. Click the 'New client' button. Client's details edit form will be displayed.



Start **Klient** Rozliczenia Abonament Ustawienia Admin Wyloguj **Coach Circle**

Szczegóły

Imię

Nazwisko

Data urodzenia

Może się logować

Status

Sponsor

Zawód

Data pierwszej sesji

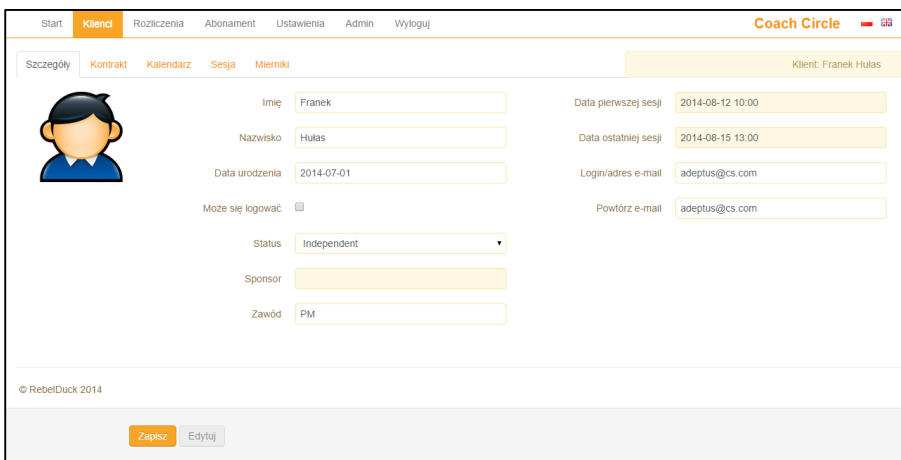
Data ostatniej sesji

Login/adres e-mail

Powtórz e-mail

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3. Click the 'Edit' button to enable edit mode and start entering the client's data in the available fields.



Start **Klient** Rozliczenia Abonament Ustawienia Admin Wyloguj **Coach Circle**

Szczegóły **Kontrakt** Kalendarz Sesja Mierniki Klient: Franek Hulas

Imię

Nazwisko

Data urodzenia

Może się logować

Status

Sponsor

Zawód

Data pierwszej sesji

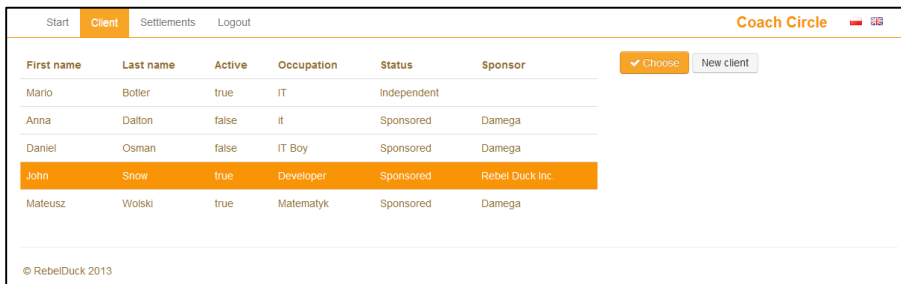
Data ostatniej sesji

Login/adres e-mail

Powtórz e-mail

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4. Fill in all required fields. Set if client is the 'Independent' or the 'Sponsored'
5. Checkbox "Can login" controls client access to the application. If you decide not to check it you do not have to fill in the "Login/e-mail" and "Confirm e-mail". When you decide to give Cache an access to the system then you must correctly complete the fields of his email (activation e-mail will be sent to this mailbox). If you decide to deprive the client of right to use the systems, then simply uncheck the box "Can login".
6. You can always modify the data entered by clicking the "Edit" button and repeat step 4. You can also modify client's login information. Each time you change Cache's login, he will need to activate his account based on new email address.
7. Select the 'Client' from the main menu. You will see the new client in the list.



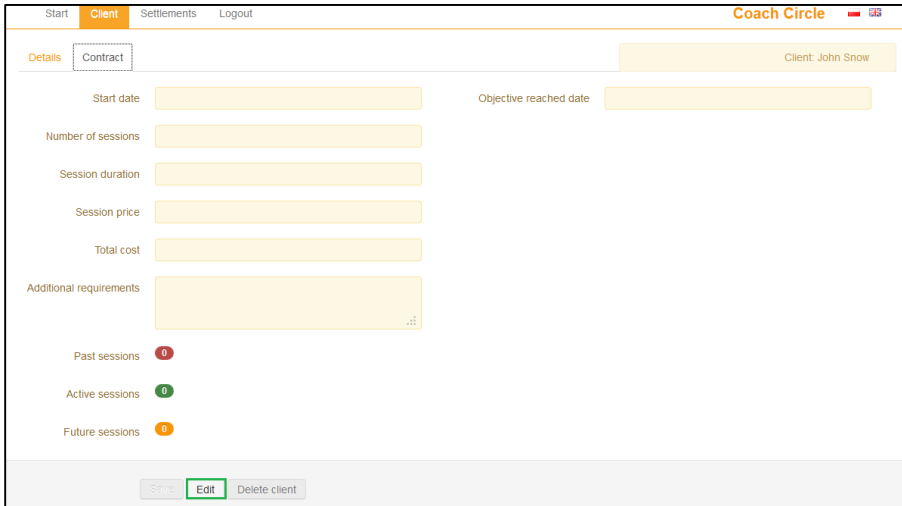
The screenshot shows the 'Client' management interface. At the top, there are navigation tabs: 'Start', 'Client' (selected), 'Settlements', and 'Logout'. The 'Coach Circle' logo and flags are in the top right. Below the navigation is a table with columns: 'First name', 'Last name', 'Active', 'Occupation', 'Status', and 'Sponsor'. There are two buttons: 'Choose' (with a checkmark) and 'New client'. The table contains five rows of client data. The row for 'John Show' is highlighted in orange. At the bottom left, there is a copyright notice: '© RebelDuck 2013'.

First name	Last name	Active	Occupation	Status	Sponsor	
Mario	Botler	true	IT	Independent		<input checked="" type="checkbox"/> Choose
Anna	Dalton	false	it	Sponsored	Damega	
Daniel	Osman	false	IT Boy	Sponsored	Damega	
John	Show	true	Developer	Sponsored	Rebel Duck Inc.	
Mateusz	Woiski	true	Matematyk	Sponsored	Damega	

8. To start working with a chosen client click to highlight the record and confirm by pressing the 'Choose' button. Client details will be displayed.

4. Creating and editing client's contract

1. Select the 'Client' from the main menu. You will see a list of all your clients. To start working with client click to highlight it and confirm with the 'Choose' button. Client details will be displayed.
2. Select the 'Contract' tab. Client's contract edit form will be displayed.



Start Client Settlements Logout **Coach Circle** 🇬🇧

Details **Contract** Client: John Snow

Start date Objective reached date

Number of sessions

Session duration

Session price

Total cost

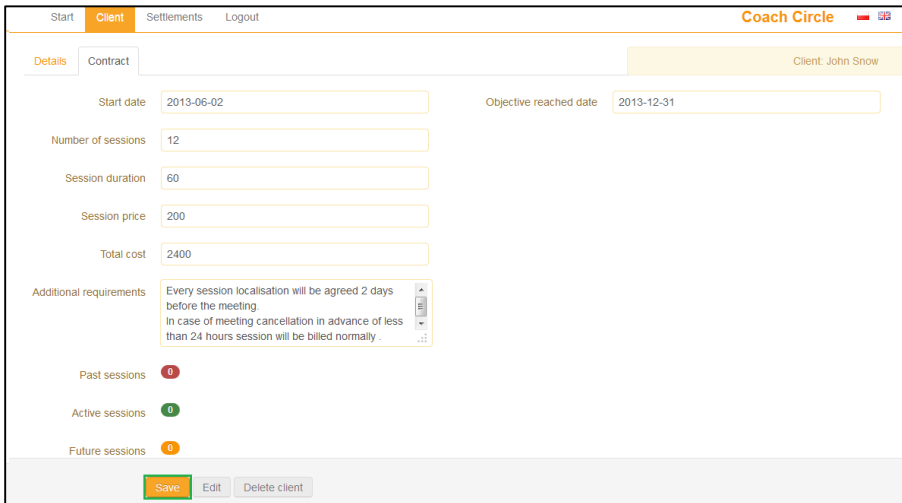
Additional requirements

Past sessions 0

Active sessions 0

Future sessions 0

3. Click the 'Edit' button to enable edit mode and start creating client's contract.



Start Client Settlements Logout **Coach Circle** 🇬🇧

Details **Contract** Client: John Snow

Start date Objective reached date

Number of sessions

Session duration

Session price

Total cost

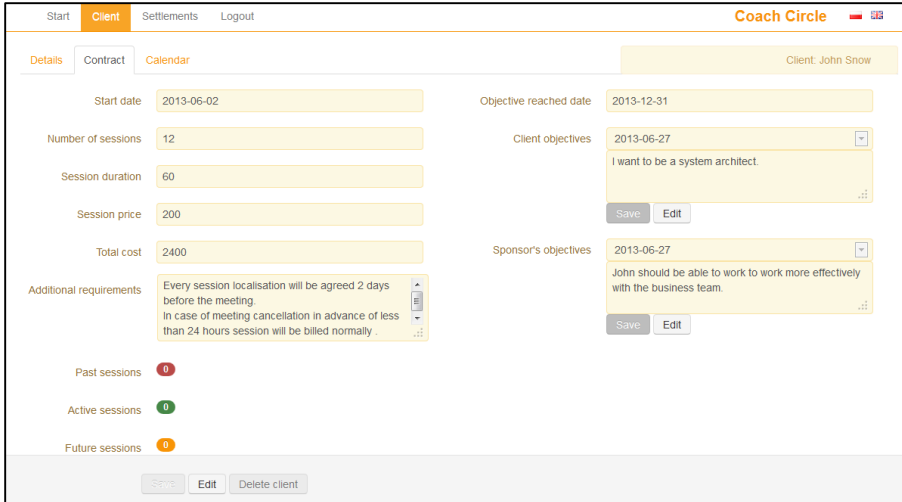
Additional requirements

Past sessions 0

Active sessions 0

Future sessions 0

4. Fill in all required fields and confirm by clicking the 'Save' button.
5. After saving additional fields will be displayed – Client and Sponsor's (if client is set as sponsored) objectives. You may fill in these fields by clicking the 'Edit' button and the 'Save' once completed.



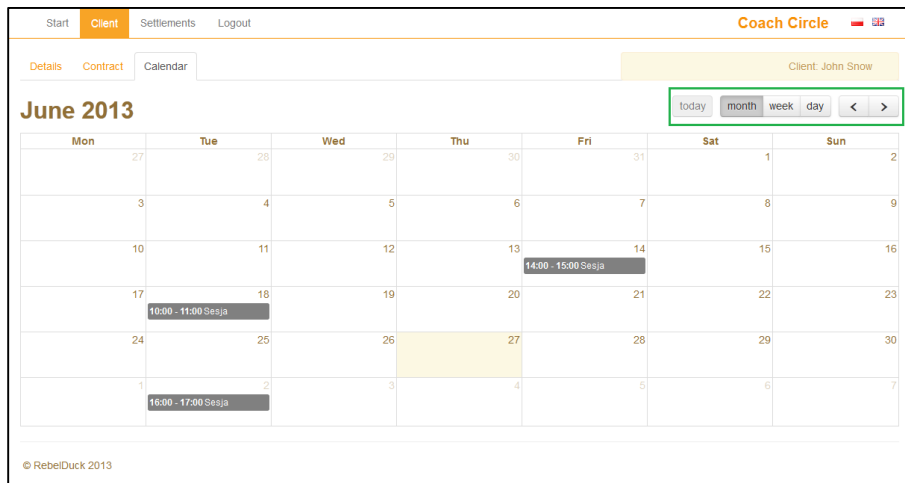
The screenshot displays the 'Client' details page for 'John Snow'. The interface includes a navigation bar with 'Start', 'Client', 'Settlements', and 'Logout'. The main content area is divided into sections for 'Details', 'Contract', and 'Calendar'. The 'Details' section contains several input fields: 'Start date' (2013-06-02), 'Objective reached date' (2013-12-31), 'Number of sessions' (12), 'Client objectives' (2013-06-27, 'I want to be a system architect'), 'Session duration' (60), 'Sponsor's objectives' (2013-06-27, 'John should be able to work to work more effectively with the business team'), 'Session price' (200), and 'Total cost' (2400). An 'Additional requirements' section contains a text area with the text: 'Every session localisation will be agreed 2 days before the meeting. In case of meeting cancellation in advance of less than 24 hours session will be billed normally...'. At the bottom, there are three status indicators: 'Past sessions' (0), 'Active sessions' (0), and 'Future sessions' (0). A footer bar contains 'Save', 'Edit', and 'Delete client' buttons.

- You may modify entered data by clicking the 'Edit' button at the bottom and repeating manipulation from step 4 and 5 of this scenario.

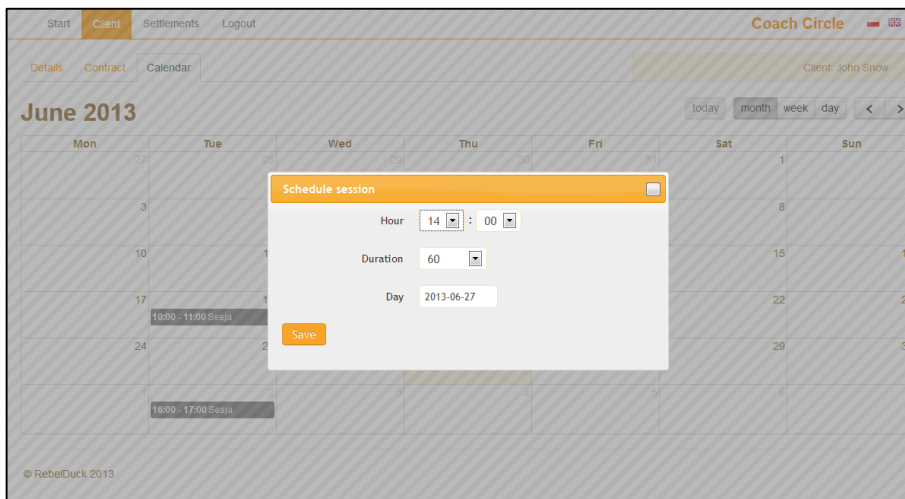
Please note that in case of modifying Client and/or Sponsor's objectives, previous versions may be displayed (tracked) by selecting modification date from the drop-down field.

5. Planning sessions calendar

1. Select the 'Client' from the main menu. You will see list of all your clients. To start working with a chosen client click to highlight the record and confirm with the 'Choose' button. Client details will be displayed.

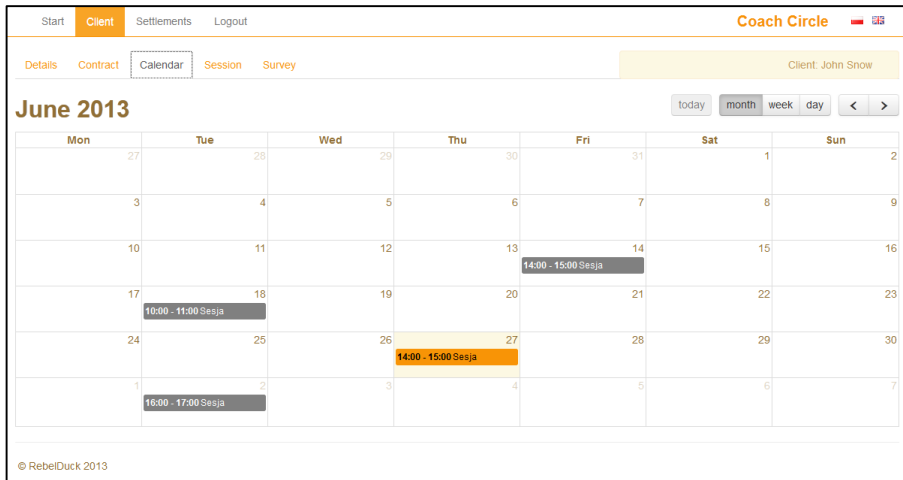


2. Select the 'Calendar' tab. A calendar form will be displayed. You may switch the month-week-day view and navigate back and forward by using the buttons in right upper corner of the window. Entries in grey are already occupied by your different clients.

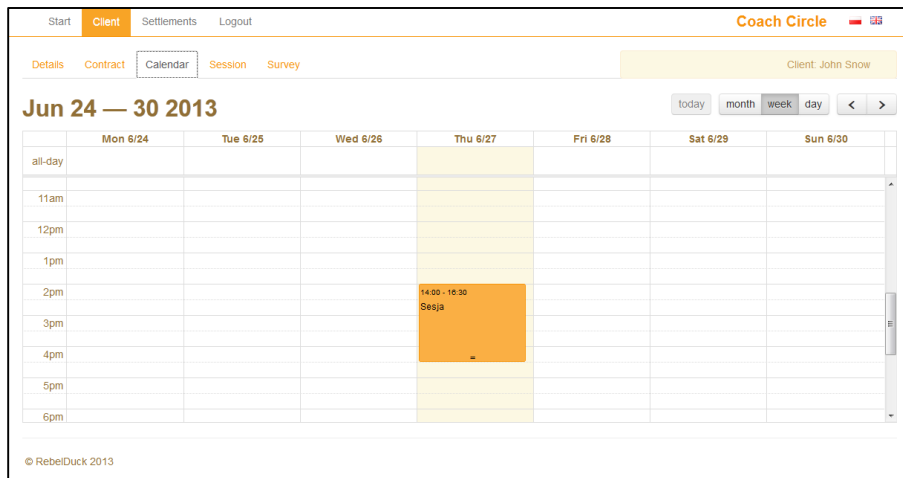


3. To add a new session click on the chosen day in the month view or on the chosen hour in the week view. The schedule session panel appears. Set session start time and session duration. Confirm by clicking the 'Save' button. A new session will be added and color-coded in orange.

Please note that if it was the client's first session then the 'Session' and the 'Survey' tabs appear.

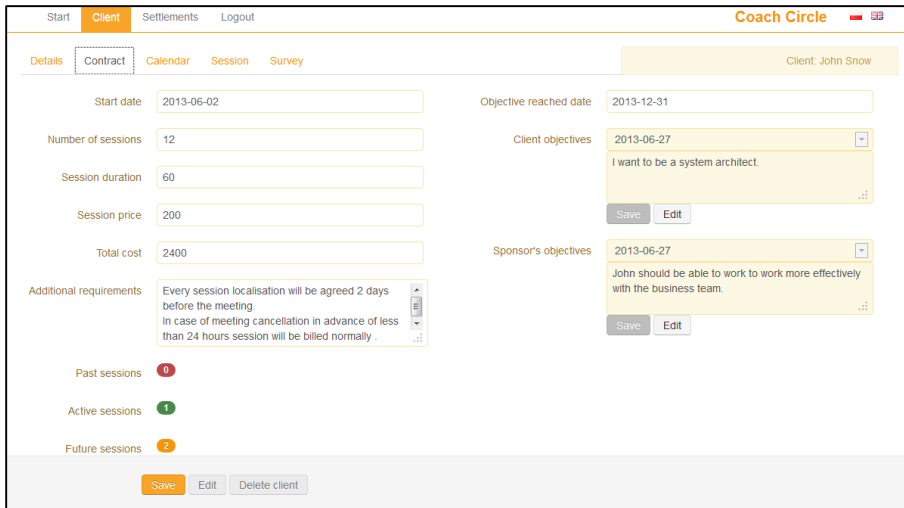


4. To modify day of the session just drag the entry to another day and drop.
5. To modify hour switch to weekly view and drag the session entry to another time or day.



6. To modify session duration switch to weekly view and drag the upper or lower border of the chosen entry.
7. All sessions defined in the 'Calendar' tab are counted in the 'Contract' tab as:
 - Past Sessions – session/s planed before current day (red);
 - Active session – nearest planed session (green);

- Future sessions – next planned session/s (orange).

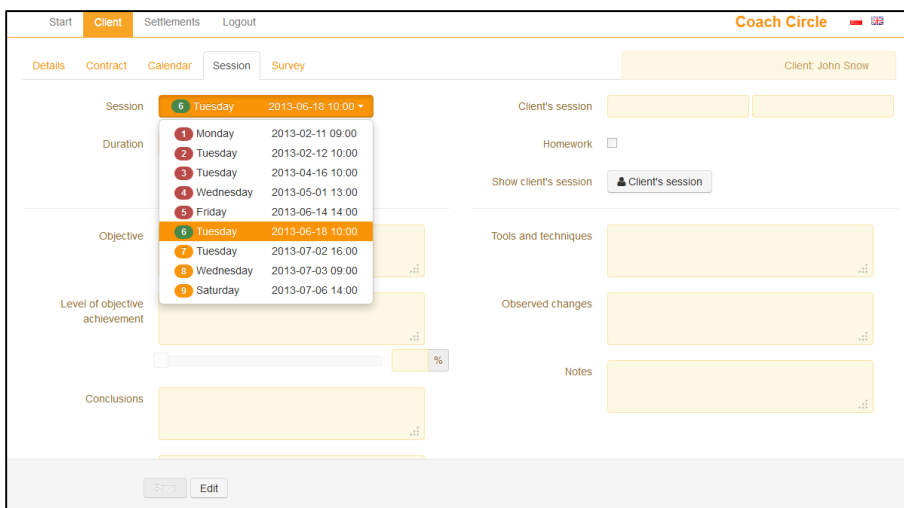


The screenshot shows the 'Client' page for John Snow. The 'Contract' tab is active, displaying various contract details:

- Start date:** 2013-06-02
- Objective reached date:** 2013-12-31
- Number of sessions:** 12
- Client objectives:** 2013-06-27, "I want to be a system architect."
- Session duration:** 60
- Sponsor's objectives:** 2013-06-27, "John should be able to work to work more effectively with the business team."
- Session price:** 200
- Total cost:** 2400
- Additional requirements:** "Every session localisation will be agreed 2 days before the meeting. In case of meeting cancellation in advance of less than 24 hours session will be billed normally."
- Past sessions:** 0
- Active sessions:** 1
- Future sessions:** 2

Buttons for 'Save', 'Edit', and 'Delete client' are visible at the bottom.

8. All sessions defined in the 'Calendar' tab are listed in the 'Session' tab as well and have the same color-codes for Past, Active and Future sessions. You may display details of any session by selecting it from the 'Session' drop-down field.



The screenshot shows the 'Client' page for John Snow, with the 'Session' tab active. A dropdown menu is open, listing sessions with color-coded indicators:

- 1 Monday 2013-02-11 09:00
- 2 Tuesday 2013-02-12 10:00
- 3 Tuesday 2013-04-16 10:00
- 4 Wednesday 2013-05-01 13:00
- 5 Friday 2013-06-14 14:00
- 6 Tuesday 2013-06-18 10:00 (highlighted in orange)
- 7 Tuesday 2013-07-02 16:00
- 8 Wednesday 2013-07-03 09:00
- 9 Saturday 2013-07-06 14:00

The main form displays details for the selected session (6):

- Session:** 6 Tuesday 2013-06-18 10:00
- Client's session:** (empty field)
- Duration:** (empty field)
- Objective:** (empty field)
- Level of objective achievement:** (empty field with a percentage input)
- Conclusions:** (empty field)
- Tools and techniques:** (empty field)
- Observed changes:** (empty field)
- Notes:** (empty field)

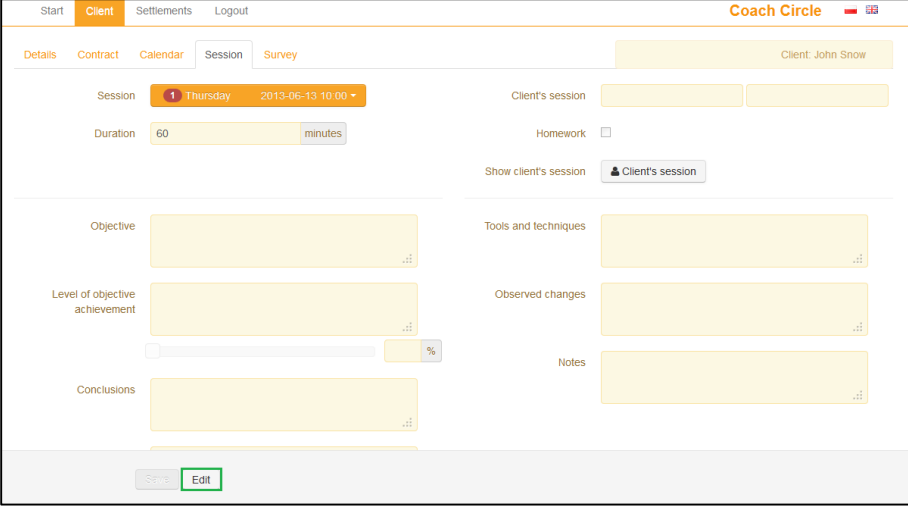
Buttons for 'Save' and 'Edit' are visible at the bottom.

6. Editing session details and generating report

1. Select 'Client' from the main menu. You will see a list of all your clients. To start working with a client click to highlight the chosen record and confirm with the 'Choose' button. Client details will be displayed.
2. You may start working with sessions in two ways:
 - Go to the 'Calendar' tab, on the calendar find the session that you are interested in and click it. You will be presented with the chosen session details in the 'Session' tab.
 - Go to the 'Session' tab, click on the Session drop-down field and select the one you are interested in. The screen will be reloaded with the selected session details.

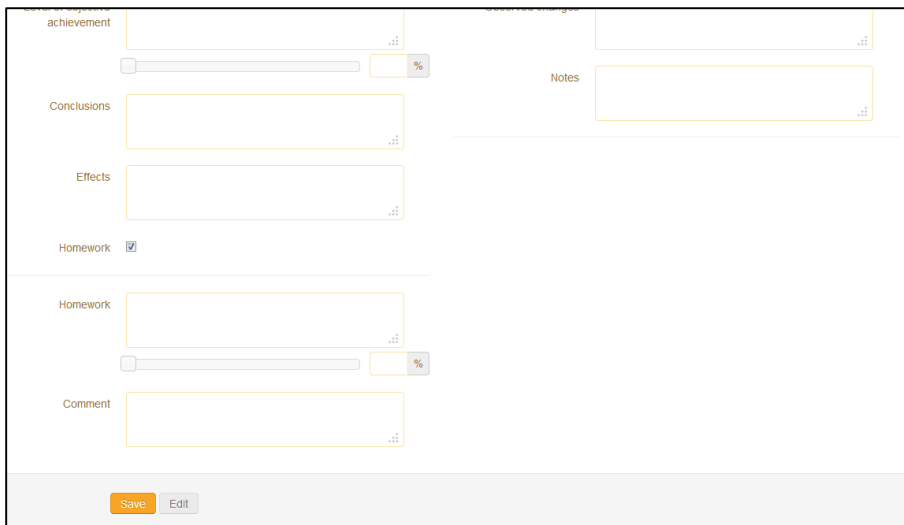
Please note: Coach may modify every session regardless of its status – past, active or future.

3. To start editing session details click the 'Edit' button.



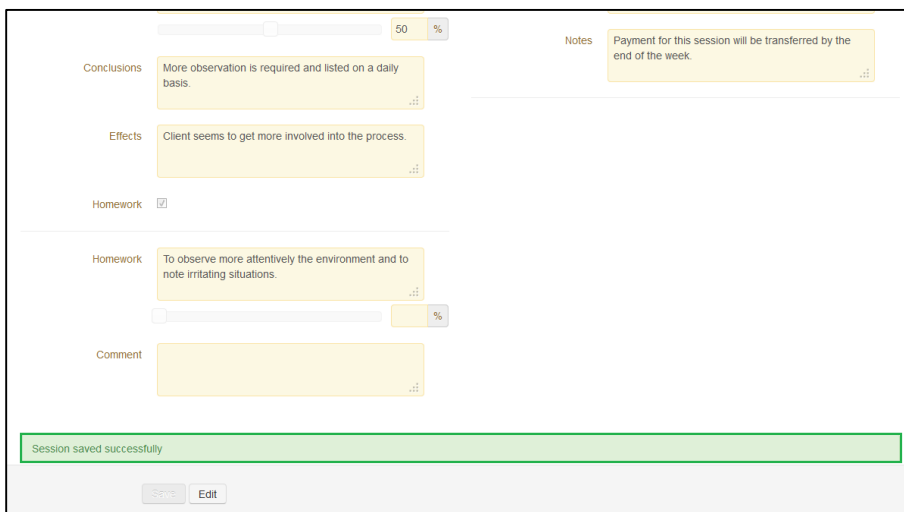
4. Fill in enabled fields for current session:
 - Objective;
 - Level of objective achievement and progress bar;
 - Conclusions;

- Effects;
 - Tools and techniques;
 - Observed changes;
 - Notes.
5. To enable the homework section select the 'Homework' checkbox and fill in your comments in the fields that will appear.



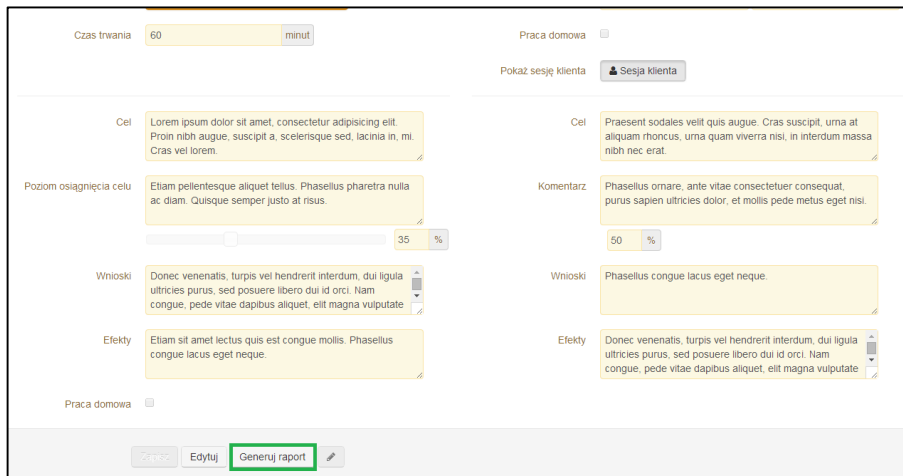
The screenshot shows a web form with several sections. At the top, there is an 'achievement' section with a progress bar and a percentage input field. Below that is a 'Conclusions' section with a text area. The 'Effects' section has a text area. The 'Homework' section is checked with a checkbox and has a text area and a progress bar. At the bottom, there is a 'Comment' section with a text area. On the right side, there is a 'Notes' section with a text area. At the bottom of the form, there are 'Save' and 'Edit' buttons.

6. You may save all modification by clicking the 'Save' button. You will be informed about successful saving on a notification bar at the bottom of the window.



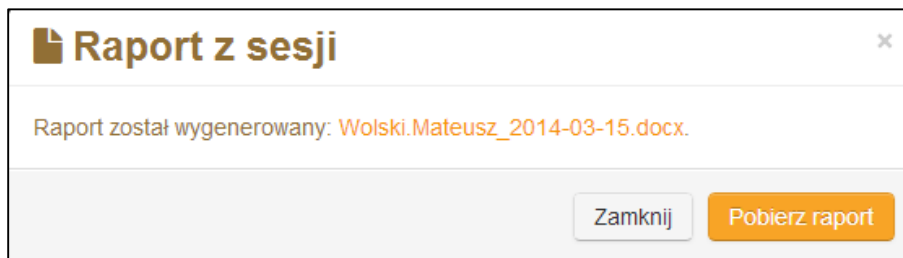
The screenshot shows the same web form as above, but now with filled-in text. The 'achievement' progress bar is set to 50%. The 'Conclusions' text area contains 'More observation is required and listed on a daily basis.' The 'Effects' text area contains 'Client seems to get more involved into the process.' The 'Homework' text area contains 'To observe more attentively the environment and to note irritating situations.' The 'Notes' text area contains 'Payment for this session will be transferred by the end of the week.' At the bottom, a green notification bar displays 'Session saved successfully'. The 'Save' and 'Edit' buttons are still present.

7. After saving the session you may generate a report basing on inputted data. Click 'Generate report' in bottom section of the window.



The screenshot shows a web interface for generating a report from a session. At the top left, there is a field for 'Czas trwania' (Duration) set to '60' minutes. To the right, there is a 'Praca domowa' (Homework) checkbox. Below this, there is a 'Pokaz sesję klienta' (Show client session) button with a user icon. The main area is divided into two columns. The left column contains fields for 'Cel' (Goal), 'Poziom osiągnięcia celu' (Level of goal achievement) with a progress bar at 35%, 'Wnioski' (Conclusions), and 'Efekty' (Effects). The right column contains fields for 'Cel', 'Komentarz' (Comments) with a progress bar at 50%, 'Wnioski', and 'Efekty'. At the bottom, there are buttons for 'Zamknij' (Close), 'Edytuj' (Edit), 'Generuj raport' (Generate report), and a pencil icon. The 'Generuj raport' button is highlighted with a green box.

8. The system will start generating the report. When completed a pop up will appear asking you to confirm the location to save the document. The system will automatically give it following name `FirstName.LastName_session-date.doc`. To open a document you must first save it. Press the "Download report" and then select desired location.



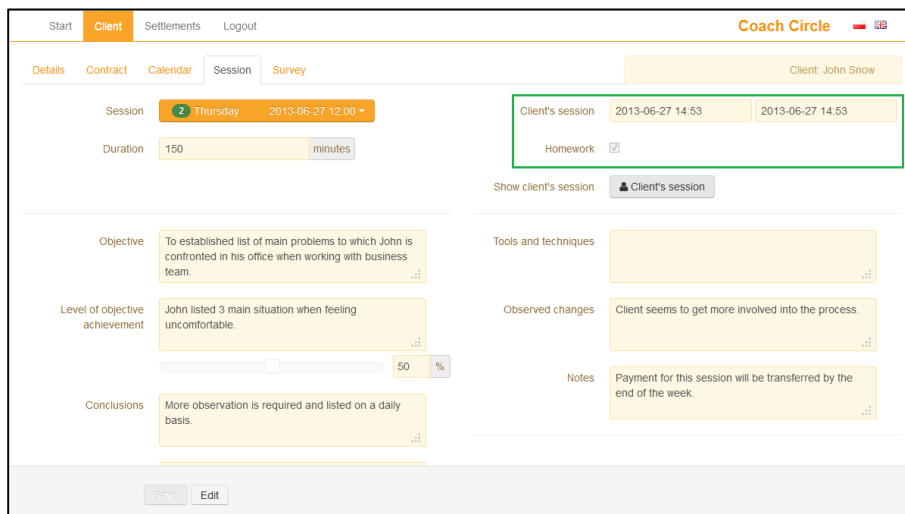
The screenshot shows a popup window titled 'Raport z sesji' (Report from session). The main text reads: 'Raport został wygenerowany: `Wolski.Mateusz_2014-03-15.docx`.' At the bottom, there are two buttons: 'Zamknij' (Close) and 'Pobierz raport' (Download report).

7. Session details and client's involvement tracking


1. Select 'Client' from the main menu. You will see a list of all your clients. To start working with a client click the selected record to highlight it and confirm with the 'Choose' button. Client details will be displayed. Open the session you want to analyse in the 'Session' tab.

You may see additional information:

- Date and time stamp when client filled in and / or modified his session details; Whether the client edited his / her homework.



2. To see coache's session detail click the 'Client's session' button. Right-hand panel will be replaced with the session details filled by the coache. Fields are aligned so you may compare your insights with coache's comments.

Start **Client** Settlements Logout Coach Circle 

Details **Contract** Calendar **Session** Survey Client: John Snow

Session **2 Thursday** 2013-06-27 12:00 Client's session 2013-06-27 14:53 2013-06-27 15:29

Duration 150 minutes Homework

Show client's session **Client's session**

Objective To established list of main problems to which John is confronted in his office when working with business team. ...

Level of objective achievement John listed 3 main situation when feeling uncomfortable. ...

Conclusions More observation is required and listed on a daily basis. ...

Effects Client seems to get more involved into the process. ...

Homework

Homework To observe more attentively for next 2 weeks the environment and to note irritating situations. ...

Comment

Objective To find out what bother me in the office. ...

Comment 1. Someone is asking me to do something when I'm in the middle of my task. ...

Conclusions

Effects I know how to priorities my tasks to finish earlier accordingly to the schedule. ...

Filling date 2013-06-27 14:58 2013-06-27 15:17

Homework

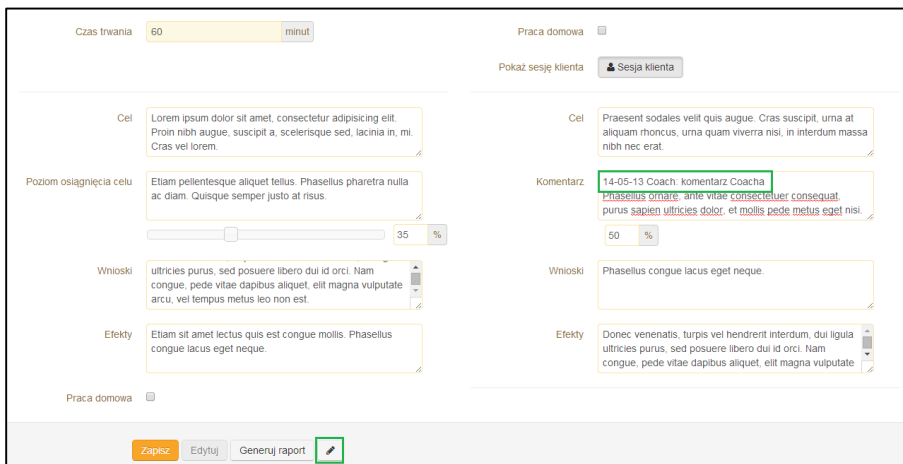
Comment I was sick and working from my place. I will get back to this as soon as I came back to office. ...

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3. You may start editing your session details by clicking the 'Edit' button at the bottom of the window when having those of your client on the right side.
4. To close coach's details click the 'Client's session' button again.

8. Editing client's session details

1. Select 'Client' from the main menu. You will see a list of all your clients. To start working with a client click the selected record to highlight it and confirm with the 'Choose' button. Client details will be displayed. In the 'Session' tab open the session you want to analyse and edit.
2. To start editing client's session activate it by clicking the 'Client's session'. The system displays the details on the right hand panel.
3. Press the 'Edit' button and then select the text field you want to edit. To accurately show which text is to be modified point the cursor to the appropriate place and then press the 'Pencil' icon at the bottom of the screen. This will set a date stamp and user modifying the client entry. It is allowed to edit or delete entire client's entry.

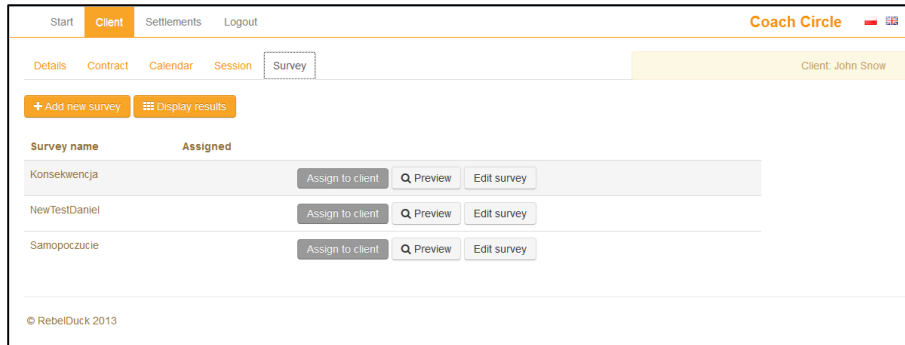


The screenshot displays a web interface for editing a client's session. It is divided into two main panels. The left panel contains fields for 'Czas trwania' (60 minut), 'Praca domowa', 'Cel', 'Poziom osiągnięcia celu' (with a progress bar at 35%), 'Wnioski', and 'Efekty'. The right panel contains 'Praca domowa', 'Pokaz sesję klienta', 'Sesja klienta', 'Cel', 'Komentarz' (with a date stamp '14-05-13 Coach: komentarz Coacha'), 'Wnioski', and 'Efekty'. At the bottom, there are buttons for 'Zapisz', 'Edytuj', 'Generuj raport', and a pencil icon for editing.

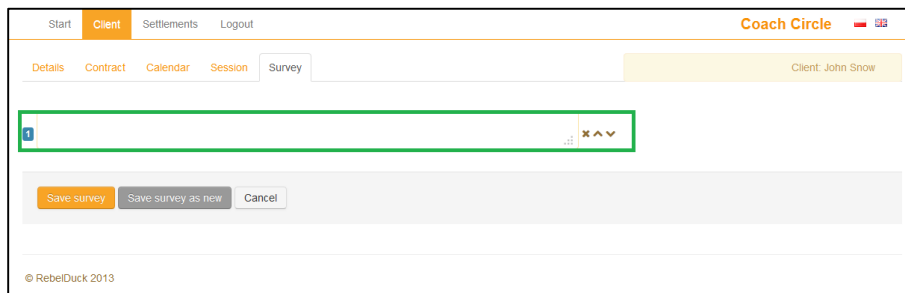
4. To save your changes, confirm by clicking 'Save'. Since that time, also your client will see the revised text.

9. Managing surveys, creating and editing

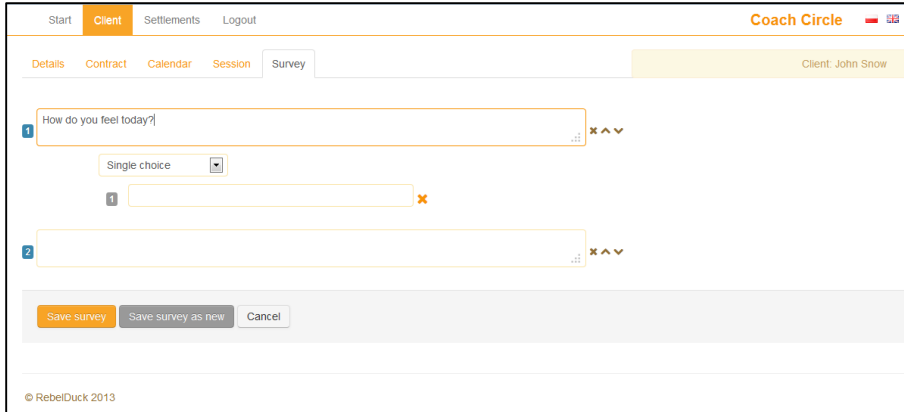
1. Select 'Client' from the main menu. You will see a list of all your clients. To start working with a client click to the selected record to highlight it and confirm with the 'Choose' button. Client details will be displayed.
2. In the 'Survey' tab you will see all surveys that you created.



3. To create a new survey click the 'Add new survey' button and enter the new survey's name. Edit form will be displayed. You will see an empty text field representing the first survey question.

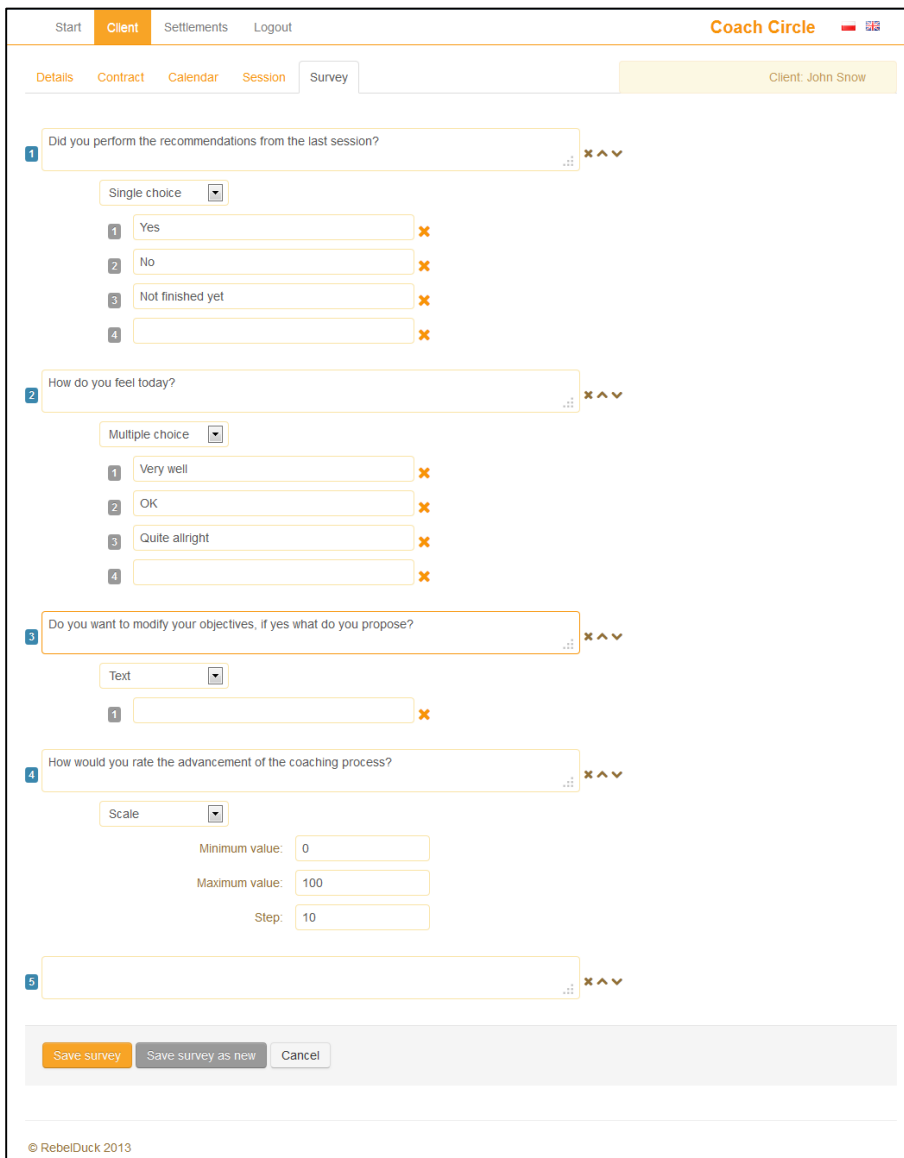


4. When you start typing in the first question, a new field representing a possible answer will appear below. When you start typing in the answer field the next empty text field will appear etc.



The screenshot shows the 'Survey' tab in the Coach Circle interface for client John Snow. The first question is 'How do you feel today?'. Below the question is a 'Single choice' dropdown menu. Underneath, there is a single input field with a red 'x' icon, indicating it is required. At the bottom of the form, there are three buttons: 'Save survey', 'Save survey as new', and 'Cancel'. The footer shows '© RebelDuck 2013'.

5. You may select one of the following answer types:



The screenshot shows the 'Survey' tab in the Coach Circle interface for client John Snow. It displays five questions with different answer types:

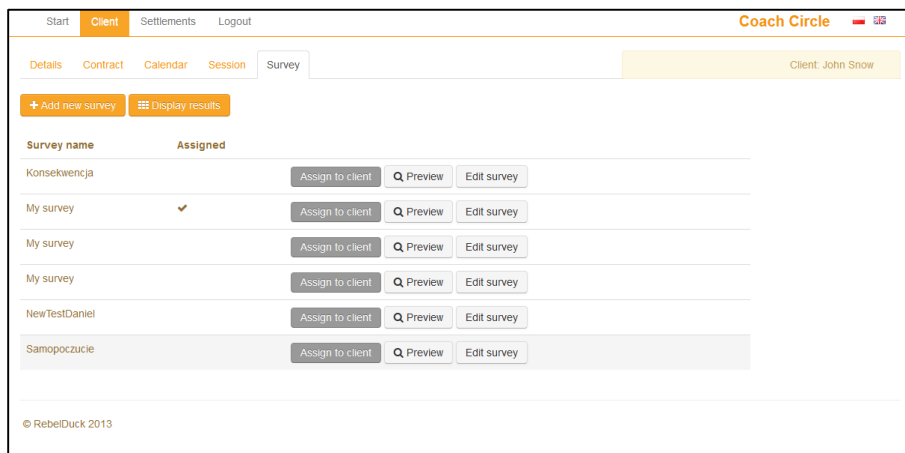
- Question 1:** 'Did you perform the recommendations from the last session?' with a 'Single choice' dropdown and four input fields (Yes, No, Not finished yet, and an empty one).
- Question 2:** 'How do you feel today?' with a 'Multiple choice' dropdown and four input fields (Very well, OK, Quite alright, and an empty one).
- Question 3:** 'Do you want to modify your objectives, if yes what do you propose?' with a 'Text' dropdown and one input field.
- Question 4:** 'How would you rate the advancement of the coaching process?' with a 'Scale' dropdown and three sub-inputs: 'Minimum value: 0', 'Maximum value: 100', and 'Step: 10'.
- Question 5:** An empty question box.

At the bottom of the form, there are three buttons: 'Save survey', 'Save survey as new', and 'Cancel'. The footer shows '© RebelDuck 2013'.

- Single choice – enter as many possible answer as needed, only one may be chosen by the coache;
 - Multiple choice – enter as many possible answer as needed, multiple answers may be chosen by the coache;
 - Text – coache is asked to enter a text as an answer;
 - Scale – enter numeric minimum and maximum values and a value of the step. Example: if you enter minimum: 0, maximum 10, step size: 5 then only three values will be possible: 0, 5, 10.
6. Confirm your survey by clicking the ‘Save’ button. The new survey appears on the survey list.
 7. To see survey details click ‘Preview’, to edit click the ‘Edit’ button. You may save the modified survey as a new one (without modifying the initial version) by clicking ‘Save survey as new’.

Please note: If you decide to modify a survey, it will change for all the coaches it was assigned to. Save as new instead.

8. To assign one of the existing surveys to an active coache (for which the session is active) click the ‘Assign to client’ button next to the chosen survey. You will see a check mark in the ‘Assigned’ column.



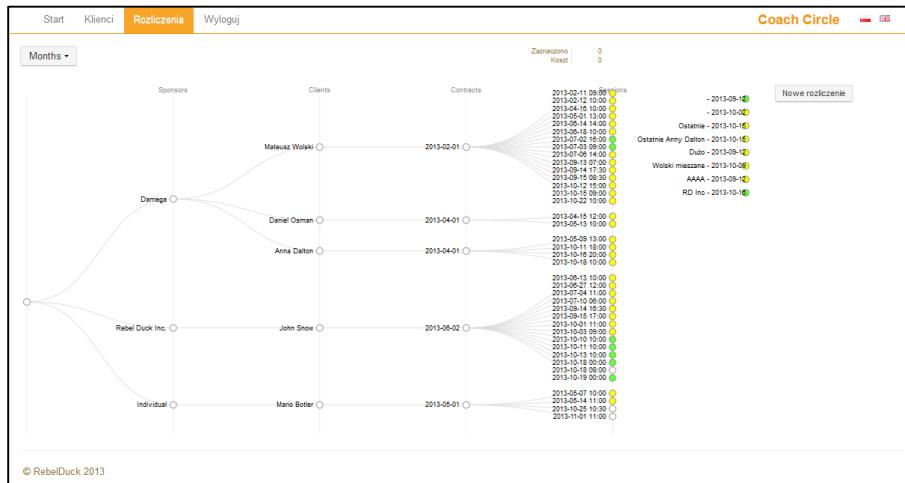
Please note:

- Only one survey form is available for each session.

- Clients may modify the answers many times before the next session starts. Only the last answers are saved.
 - Client may have only one survey assigned. When switching to another one you won't see the response history of the previous one.
9. To see client's responses click the 'Display results' button. You will see a history of his answers (one survey answer per session).

10. Settlements

1. Select 'Settlements' from the main menu. You will see a list of all your clients' sessions organized in an interactive tree graph.



2. All sessions are grouped in the following hierarchies:
 - Independent or sponsored (for sponsor clients);
 - Client name;
 - Contract creation date;
 - Single sessions.
3. To show or hide (filter) elements on the graph just click on the tree selected nodes – this will cause folding / unfolding of the selected groups.
4. At the top right corner you will find a date filter – only sessions from checked periods will be displayed. The graph will change dynamically when marking the checkboxes adjusting the list of sessions.
5. To create a settlement just mark the required sessions. The system will calculate the sum of selected sessions and their total cost based on the values stored in the contract tab.

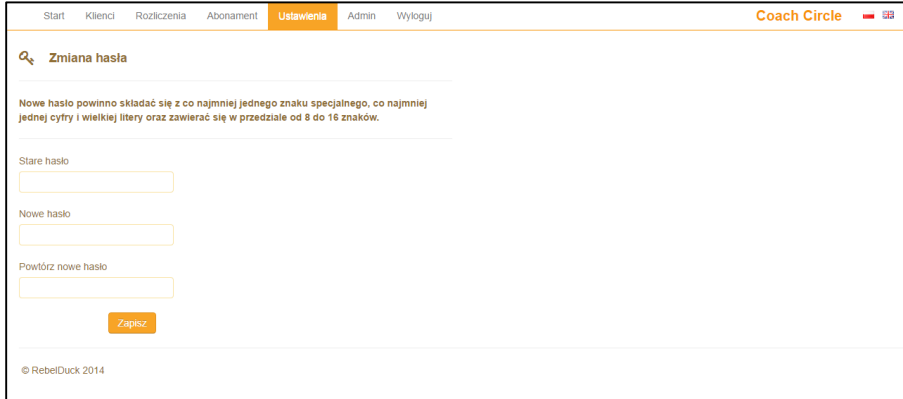
- Click the 'New settlement' button. You may modify the calculated total cost and set settlement as 'bill' or 'clearing' and add name/number. Click 'Save' to confirm or 'Cancel' to stop edition.



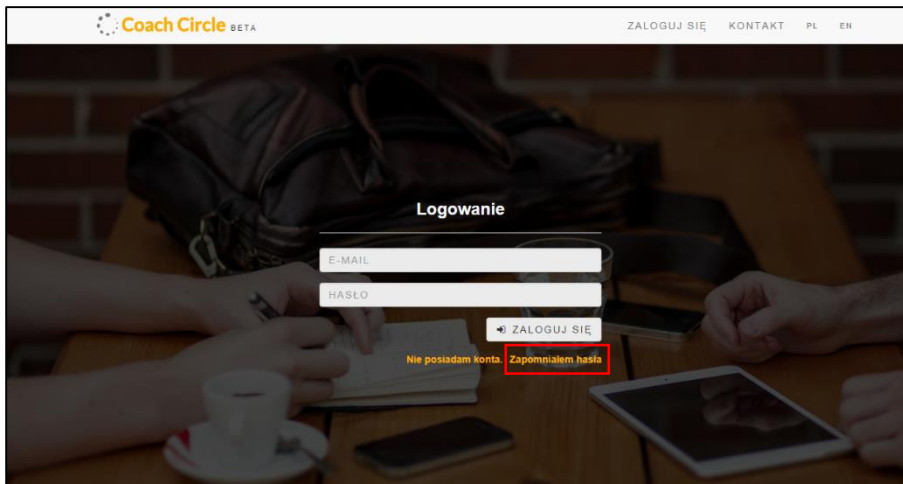
- Settlements saved as 'bill' are color coded in yellow (sessions and settlements) and 'cleared' are highlighted in green.
- You may edit the list of sessions assigned to a settlement by clicking on the selected settlement node – all active connections are marked in orange. Check or uncheck sessions to be assigned or unassigned and confirm by 'Save'.
- To change settlement type just click on it and select the chosen type from the combo-box and save.
- All the connections of a given settlement can be view quickly by hovering the mouse cursor over the chosen settlement node.

11. Change password

1. Select 'Settings' from the main menu. You will see a form to change the password.



2. Fill in the current password and twice the new one. Remember about required form of the new password: it should be at least 8 characters long and no more than 16, contain at least one digit, one special character (e.g. ! or @ or # or \$ etc.) and one capital letter. Confirm by clicking "Save" button.
3. System will validate new password and inform you about the result.
4. It is also possible to recover the password. For this purpose, before logging, click the link "I forgot my password" on the main login page. You will be redirected to the recovery form.



5. Enter the email address used as a login to the system and confirm by pressing "Send" button. Activation message will be re-sent to this email box (as in the case of creating a new account).