



User Manual OnzeCoach Portal

Welcome to the user's manual of the OnzeCoach Xpert Suite Portal. This is a portal where your employees can sign up for coaching. In this manual, we will guide you through the steps on how to use the portal.

Inhoud

1. Registrering your account.....	2
3. Back- up code:.....	3
4. Logging in	3
5. Registering a new employee	4
6. Initiating a coaching process	5
7. Searching a file	5
8. Handling tasks.....	6
9. Viewing Statistics	7
10. Frequently Asked Questions	8
Having problems or questions regarding login?	8
How do I request a new user account?.....	8
Other questions?	8

Setting up language preferences

At the bottom left corner of the portal, you can find the "Settings/Instellingen" option. By clicking on it, you can modify the language settings according to your preference

1. Registrering your account

In order to use the OnzeCoach Portal, you need to create a user account once. You will receive a system email containing a unique link that allows you to register and set up your user account. If the link has expired or is not working for any reason, please contact our service desk at info@onzecoach.nl or 085-3030231.

By clicking the link in the email, you will be directed to a screen where you can set a unique password of your choice.

2. Setting up 2-factor authentication

Next, you can choose the second-step verification method. You need to select one of the options below:

- SMS security
- YubiKey security
- Authentication app

SMS: First, you will be prompted to set up authentication via SMS. A verification code will be sent to your phone for each login. Please enter the phone number where you wish to receive this code. Note that when registering the mobile number, you need to include the country code. For Dutch phone numbers, this is +31 or 0031. The leading 0 in the 06 number should be omitted.

If you prefer to use YubiKey or the authentication app, click on "Do not use SMS confirmation" at the bottom right.

Yubikey code: A YubiKey is a USB authentication and security key available for purchase online. If you don't have a YubiKey or have already set up SMS security, click on "Skip" or "I don't have a YubiKey" at the bottom right.

Authenticator app: Next, you will be directed to the screen to set up authentication via the app. If you have already chosen another 2-factor security method, click on "Skip" or "Do not use authentication app" at the bottom right.


If you wish to use the authenticator app, it can be downloaded for free on your mobile phone from the App Store or Google Play Store. Each time you log in, you will receive an authentication number. Scan the QR code on the screen using the app and enter the obtained number.

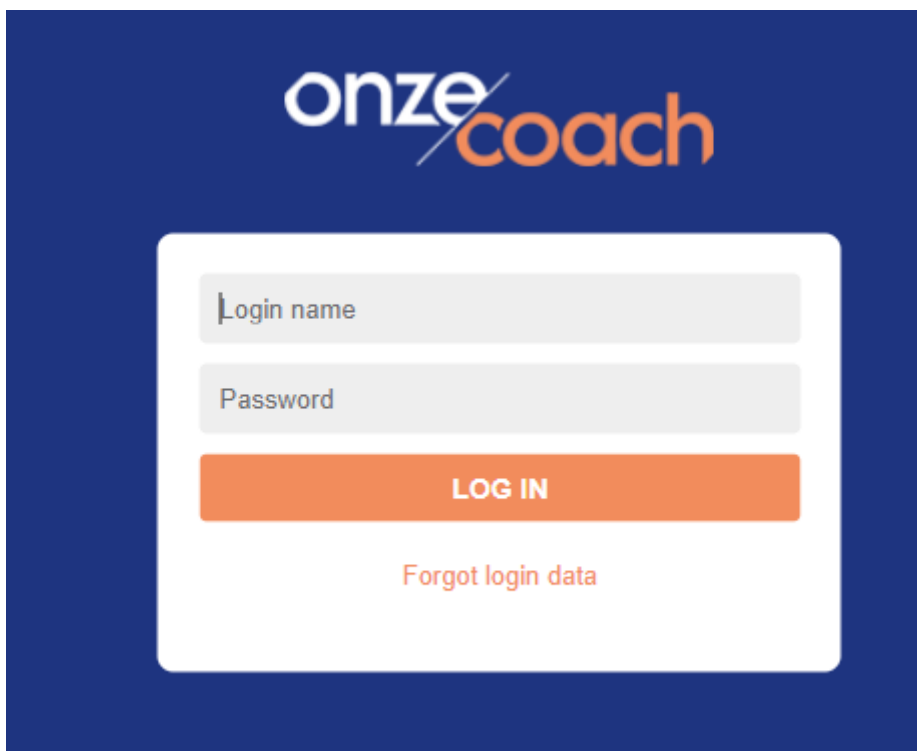
3. Back- up code:

After setting up an authentication method, you will see a screen with a backup code. If you don't receive an SMS code on your mobile phone or if you happen to forget your mobile phone, you can use this code to log in. Keep this code in a safe place.

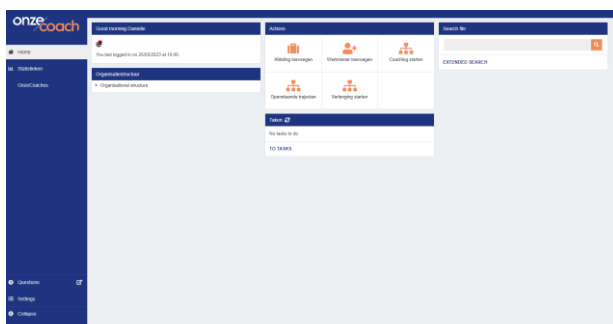
4. Logging in

To access the OnzeCoach platform, follow the steps below:

1. Go to the login link: <https://onzecoach.xpertsuite.nl/Account/LogOn>
2. You can also find the login link on the OnzeCoach website (www.onzecoach.nl) by clicking on the icon in the top right corner. 
3. Enter your login name (received during the account registration) and the password you have chosen.



4. Click on "Log In".
5. You will now reach the authentication section. If you are using the SMS method, you will receive an SMS code. If you are using the Google Authenticator app, you will see a new code in the app. Enter this code and click "Log In" again.
6. You are now logged in and will be directed to the home screen of our portal.



5. Registering a new employee

1. To register a new employee for coaching, click on the "Werknemer toevoegen" (Add Employee)" block on the homepage.



2. Then, select "OnzeCoach" as the registration type.

Registration type * Make a choice

[CANCEL](#) [→ CONTINUE REGISTRATION](#)

3. Once you are on the registration screen, enter the employee's details. If a PO number is required for the invoice, enter the cost center here as well. Click "Save" to complete the process.

Please note that fields marked with an asterisk (*) are mandatory. If you don't have certain information, you can enter a fictional answer. However, make sure that the email address is entered correctly, as the employee will not receive the invitation otherwise.

Registration type OnzeCoach

BACK

Personal details

Personnel number

Surname *

Prefixes

Known as *

Initials *

Gender * Unknown

Date of birth *

Address

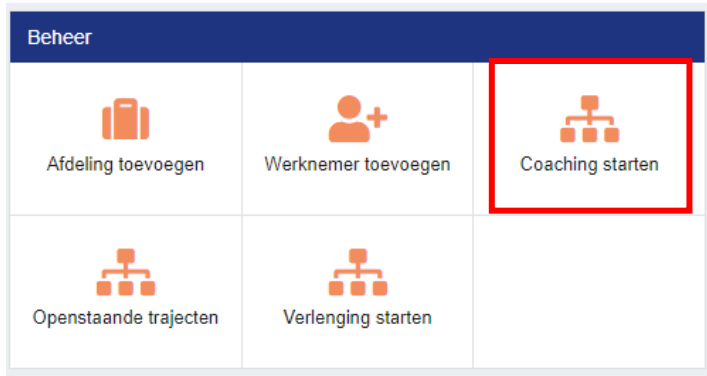
Country Netherlands

Postal code

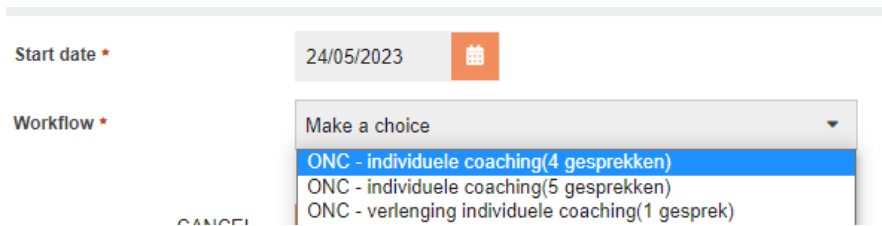
6. Initiating a coaching process

After registering an employee, the coaching process needs to be initiated.

1. Click on "Coaching starten"(Start Coaching) and search for the dossier of the respective employee by name.



2. Choose the desired start date and coaching program, then click "Start." The employee is now enrolled in coaching.



Following this registration, the employee will automatically receive an email within a few hours, inviting them to use PlanningsAgenda, the search and booking portal for employees.

Here, the employee can easily select a suitable coach and schedule an appointment to start the coaching process.

7. Searching a file

You can find the dossier of an existing employee by using the search bar. Type the first three letters of the employee's first name or last name, and the dossier of that employee will appear:



Below is an image of how the dossier of an employee looks in the system. The Xpert Suite system on which it is based was originally designed as an Occupational Health and Safety system, so you may see some elements that derive from it. However, don't worry, as they are not relevant to OnzeCoach and are not used. Here are the key points to pay attention to:

On the Overview tab, you will see:

- Recent programs: Here, you can find an overview of the coaching programs that have been initiated for this employee.
- Employee: This is where you can find the employee's details, such as their name, email address, and phone number.
- Right column: In this column, you will find the employee's department and position.

On the Program Dossier tab, you will see:

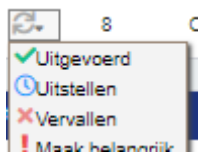
- Appointments overview: Here, you can find an overview of the number of appointments the employee has already had.

8. Handling tasks

When you click on a task on the dashboard, you will be taken directly to the task overview of the respective employee. Here, you have the option to handle the tasks.

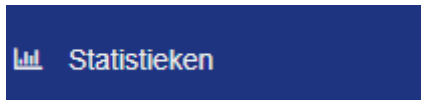


The task overview may include requests for extending a coaching program, for example. Have you already reviewed the extension request? Click on the task, select "completed," and the task will be removed from the overview.



9. Viewing Statistics

- To view statistics, click on "Statistieken" (Statistics) in the left menu bar.



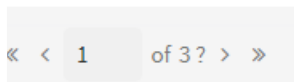
- Next, click on "Appointments Dashboard".
- Fill in all the search fields

Sometimes, after filling in one search field, the system may take a moment to load before you can fill in the next search field. Click on the downward arrow if needed. Then, click on the orange button on the right side of the screen that says "View Report".

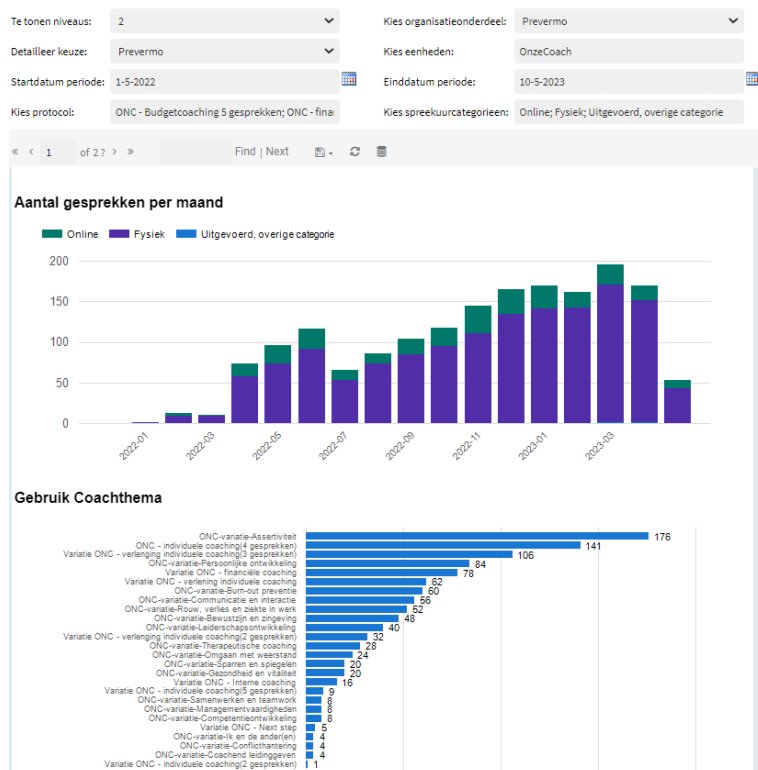
Allow the dashboard some time to load. On the dashboard, you will see, for example: the total number of sessions, sessions per month, selected themes, and the ratio between in-person and online sessions.

For more detailed information, select the checkboxes. This allows you to zoom in on department and employee levels.

- You can navigate through the pages using these arrows:



There are various statistics such as the number of scheduled appointments, the number of completed programs, and the average duration of a program.



10. Frequently Asked Questions

Having problems or questions regarding login?

- Forgot your password? Request a new password by clicking on "Forgot login details". Indicate whether you have forgotten your login name or password, and receive your login name or a link to reset your password via email..
- Having trouble changing your password? Contact OnzeCoach, and they will reset your password for you.
- Forgot your login name? Contact OnzeCoach, and they will provide you with it..
- Using Google Authenticator? Download it from the Play Store or App Store on your phone.
- Logging in with an SMS code? Make sure the code consists of lowercase letters and/or numbers..
- Forgot your phone? Use your backup code and make sure to keep it in a secure place.
- A password must meet certain requirements:

Minimum of 12 characters.

The login name cannot be included.

Cannot be the same as the last 6 used passwords.

Must meet at least 3 out of 4 requirements from the following groups (lowercase letters (a-z), uppercase letters (A-Z), numbers (0-9), special characters (e.g., ~!@#\$\$%^&*).

If you have any other questions or if something is missing from the manual, please contact OnzeCoach via info@onzecoach.nl or by phone: 085-3030231.

We are happy to assist you!

How do I request a new user account?

- Send an email with the details of the new employee to info@onzecoach.nl to request a new user account. There are no costs associated with a user account.

Other questions?

- If you have any other questions or if something is missing in the manual, please contact OnzeCoach via info@onzecoach.nl or by phone at 085-3030231.
We are happy to assist you further!