Oxford University Coaching Network

“How Quick Start” Guide for Coachee’s

How to get started with the Oxford University Coaching Network

version 1.0
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1. Introduction
Welcome to the Oxford University Coaching Network. This guide is intended to give you the basic information you need to get started using the MentorNet coaching system.

There are four main phases which are described in this document:

2. Getting an Account and Logging In

2.1. Getting an Account
To create an account you will be asked to self-register on the Oxford coaching and mentoring portal (MentorNet). You will need to go to https://oxforduni.sfgmentornet.com/ and click on the register button on the following page. You will then need to pick the Oxford University Coaching Network and choose to register for a coachee/mentee account. You must use your oxford university email ending in ox.ac.uk or your account will not be authorised.

Once you have submitted your self-registration, you will be sent a confirmation email and you then need to wait for an administrator to authorise your account. Dependent on demand on the system this may take some time, we will aim to provide everyone with access as soon as we can. You will be sent another automated email once your account has been authorised. You can then login and access your account. Note you will not be able to access your account until the administrator has authorised your account and you have received the email to confirm.

2.2. Logging In
Once you have your login details (see above), you can log in to MentorNet as follows:

1. Open your web browser using any of the common browsers (e.g. Microsoft Internet Explorer, Google Chrome, Firefox).
2. Go to https://oxforduni.sfgmentornet.com/ You will see the following login page:

![Login Page](image)

3. Enter the username and password that you chose during the self-registration process, or which you were sent in the automated email.

4. The first time you log in, you will be asked to read and sign the Privacy Notice and Consent Agreement before you can access the system. These notices tell you what your rights are under data protection legislation; they explain how your personal data will be used and who you can contact if you want to correct any mistakes or withdraw your consent. Nobody can access any of your personal data, and you cannot access MentorNet, until you have accepted the Privacy Notice and given your consent.

5. Once you have logged in, you will see a screen similar to the one below:

![Profile Screen](image)

Any fields which have the padlock symbol (🔒) against them are ‘private’ fields – this data can be seen only by you and by administrators. Your coach and other users cannot see this information.

6. Once you have logged in you should update your profile, as per the following section.

### 2.3. Smartphone Users
You can also access the MentorNet site through a smartphone. Just go to your standard smartphone browser and use the same url and user details as above.
https://oxforduni.sfgmentornet.com/. You may find it helpful to add a shortcut to MentorNet on your home page; if you’re unsure how to do this then you’ll find instructions for various types of smartphone under the Resources Section of MentorNet (Coaching Network Guidance) on the left-hand side of the screen. Look for the document titled: “Setting up MentorNet on a Smartphone”.

3. Updating Your Profile
Once you have logged in you should update your profile. Most functions to edit your profile are available by clicking on the icon on the top-right of your user profile screen – clicking on this icon will bring up the following drop-down list of options.

3.1. Changing Your Password
In order to keep your personal data secure, you can change your password to a secure password that only you know. Do this by selecting the “Change Password” option above. Passwords are required to be a minimum of 8 characters in length containing at least 1 uppercase character and 1 number.

3.2. Adding a Profile Photo
You should add a profile photo to make your profile more personal and to help others to identify you. Click on the “Edit Profile Image” and choose an image file to use. You can preview the image and crop/zoom the image to fit. Click “Upload Image” when you are happy with the image.

3.3. Editing your User Profile
If you want to edit information you have already added then you can do so here.

Choose the “Edit Profile” option from the drop-down list above. This gives you the following headings:

You can expand each heading and edit the detail within.
3.4. Skills/Expertise

The Skills/Expertise section is used to help describe what skills you’re looking to gain during your coaching relationship, and they will be used to help with the matching process. As you have already selected these during your registration you may wish to leave them as they are, or change them before you proceed to matching. We suggest 4-6 to help focus your matching.

This section has a drop-down list containing words that describe the skills you’re looking for. Select words from this list that capture skills that you wish to gain during your mentoring relationship. Choose as many words as you like from the list.

There are two ways in which you can add skills/expertise:

1. Click on the ? icon and a drop-down list of words will appear.
2. Start typing in the input box and the list will start filtering depending on the text you have entered.

With every keyword you select please click the Add icon. Once you have finished adding your skills, click the Save icon at the bottom right of the screen.

Don’t forget to click Save when you have finished all the above edits!

4. Matching

This section shows how matching works on the system.

4.1. Coach and coachee-led Matching

You are able to search for and request a coach. Your choice is then approved (or rejected) by the coach (the reasons a coaching request may be rejected would usually be due to availability or a conflict of interest).

It is possible to view the user profile of any coach by clicking on a name under the “People” menu, but it is normally more effective to use the search function to search for a coach based on keywords and skills. To use the search:

1. Click on the “Request a Coach/Mentor” button under the “Coaching/Mentoring Profile” heading:
2. At first, this will use the skills you have entered against your profile to find suitable coaches. It will list all the coaches who are offering the skills you added to your profile, and the list is ranked in order of the number of matching skills (indicated by green ticks in the screenshot below):

3. If this ‘skills-based’ match does not provide a good quality list (perhaps because you haven’t entered your skills yet) then it is also possible to type keywords into the Search box. Using the keyword search will search the entire user profile of all available mentors (not just the skills) and will find all coaches who have these keywords anywhere within their user profile (e.g. job title or industry).

4. Once you have chosen your preferred coach, click the “Request Match” button. A new screen will pop up, allowing you to enter additional information (please ignore the score button):
5. You should type in some information about your requested match, perhaps to explain why you have chosen that particular coach and what you are looking to get from coaching. This will be sent directly to the coach. (please ignore the score button).

Your request will be sent to the coach who will then either accept or reject the match request. This process can take a few days.

Once your match request has been accepted, you will receive an automated email confirming your match has been accepted. If your match is rejected then you will also receive an email informing you of this.

5. Developing your Coaching Relationship
Once you have been matched, you will want to use MentorNet to develop your relationship with your mentor. Most of MentorNet should be fairly intuitive to use, but you may find the following features useful as you build and develop your mentoring relationship:

5.1. Home Page
If you ever get ‘lost’ in the system, clicking the Home Page icon, at the top right of the screen, will take you back to your user profile page.

5.2. Messaging
Messaging in MentorNet works in much the same way as messaging in most social media apps.
To access your messages:

1. Click on the Messages icon at the top right of the screen. The number highlighted in a blue background indicates if you have unread messages.

2. You will see a list of all the conversations you are having with other users. A ‘conversation’ is a list of all the messages with that user – you have one conversation per user.
3. If you click on the conversation, you will see a list of all the messages with that user, and you are able to reply:

![Conversation Example]

**Notes:**
- You are able to type a draft message, save the draft, and return to it at a later date without sending it.
- Remember you can send/receive messages on your mobile device (see above for instructions on how to setup MentorNet on your phone).
- You will receive email notifications when you receive a new message. Email notifications can be configured so that you can change the frequency of the notifications.

**5.3. Activity Logs**

You may want to keep records of meetings/conversations you have with your coach. You can do this in MentorNet by creating an ‘Activity Log’. Sometimes you, will complete the activity log and sometimes your coach will do this, this is for you to decide together as to how you would like to record and keep information. It is not compulsory in any way to use the system for this.

To view an existing Activity Log:

1. Go to your profile and click on the Activity Log tab:

   ![Activity Log Example]

2. You will see a list of any activity logs that have already been created and you have the option to add a new activity.
3. You can view/edit an existing activity log by clicking on the pencil (✏️) icon at the far right of the activity log entry.

To create a new Activity Log:

1. Select the appropriate template from the drop-down list and click “Add Activity”.

2. An example of a simple Activity Log template is as follows:

```
<table>
<thead>
<tr>
<th>Input By</th>
<th>About</th>
<th>Created Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Linda Montee</td>
<td>Linda Montee</td>
<td>08/11/2017 11:27:45</td>
</tr>
</tbody>
</table>

* Date of Meeting

Type of Meeting

Summary of Meeting
```

5.4. Sharing Documents

You may want to share documents with your coach, perhaps so that she/he can review the document and you can discuss it at your next meeting.

To upload and share documents:

1. Go to your profile and click on the **Documents/Photos** tab:

```
<table>
<thead>
<tr>
<th>Name</th>
<th>Upload Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Linda Montee</td>
<td>20/05/2012 11:26:41</td>
</tr>
<tr>
<td>Time/Group</td>
<td>20/05/2012 13:36:10</td>
</tr>
</tbody>
</table>
```

2. You will see a list of any documents (and photos) that you have already uploaded and you can add new documents by clicking “Upload File”.

**Note:** Documents uploaded here can be viewed only by you, your mentor, and administrators.

5.5. Resources

MentorNet has a ‘Resources’ section where you can find documents that your administrator has made available to you. These might be training materials, templates, best practice documents, policies, etc.

You can access these by clicking on the “Resources” heading on the left-hand side.
6. Common Problems

6.1. General
If you have any problems or questions about the coaching programme or about use of the MentorNet system, please look at the resources section and guidance online. If that doesn’t answer your query you should contact the scheme administrator @ pdadministrator@learning.ox.ac.uk

6.2. Unable to Log In
If you cannot login to your account, the most likely reason is that your username or password is incorrect, or your account has been locked. For example, if you enter your password incorrectly 5 times then your account will be locked and you will need to ask the scheme administrator to unlock your account.

6.3. Forgotten Password
If you forget your password, click on the "Forgotten Password?" link on the Login page. You will be asked to enter your username and to confirm the email address held within the system. A new password will then be sent to the email address registered within MentorNet. If this is the incorrect email address then you will need to ask an administrator to reset your password.

6.4. Not Receiving Automated Emails
If you aren’t receiving any of the automated emails, the most likely reason is that they are going into your spam/junk folder. Check the following:
1. Check the email address on your user profile is correct
2. Check your spam/junk folders
3. Check your Notification settings
7. FAQ's

Coachee FAQs

7.1. Who will my information be seen by?
As a coachee your information can only be seen by the administrators of the OCN and any coach that you decide to match with. Coaches cannot see your profile until you request a match with them.

7.2. Why do I need to create a coachee profile?
You need to create a profile so that you are able to use the MentorNet matching system and find a coach that you would like to work with. Use of the system is voluntary but if you decide not to use the system we won’t be able to offer you coaching through this programme.

7.3. What happens to my information when the coaching is finished?

7.4. How many sessions will I have?

7.5. What are the costs for the coaching?

7.6. What if I don’t feel the coaching is working?

7.7. How much time do I need to commit?

7.8. How is the quality of coaching assured?

7.9. Are my coaching sessions confidential?

7.10. What can I expect to achieve from coaching?

7.11. How are coachees matched to coaches?

7.12. What happens when I am matched with a coach and ready to start my coaching?

7.13. I had coaching last year and found it really useful, can I get more?

7.14. Who keeps notes of sessions?

7.15. What will my coach ask me about?

7.16. What if I decide to leave the university?

7.17. What happens if my coach leaves the university?

7.18. What if I can’t attend a coaching session?

7.19. What if my coach can’t attend our planned coaching sessions?

7.20. Where should coaching sessions be held?

7.21. What happens when the coaching sessions have finished?
When your coaching relationship is finished your information will be stored on the system subject to the constraints outlined in the university data policy and the privacy policy you signed when agreeing to use this website.

7.4. How many sessions will I have?

In general, coachees will receive up to four coaching sessions. The number of sessions should be agreed between coach and coachee.

7.5. What are the costs for the coaching?

There is no charge for the coaching.

7.6. What if I don’t feel the coaching is working?

Talk to your coach, if you feel comfortable doing so. Think about what might be getting in the way and what might help. If you choose to stop coaching sessions, talk to your coach first or to the Oxford Learning Institute.

7.7. How much time do I need to commit?

Coaching sessions last between 1 to 1.5 hours in general, usually every 4 – 6 weeks (your first sessions might be closer together), and you can access up to four sessions (or occasionally more in discussion with your coach). You are likely to need to spend some time before and after sessions thinking about your goals and options, and you will need to commit time to any actions you decide to take.

7.8. How is the quality of coaching assured?

Only staff who have received formal training in coaching or who have coaching qualifications can coach on the OCN. All coaches must commit to our Coach Agreement, adhere to a professional code of ethics and attend regular supervision and CPD to enhance their practice. We also seek coachee views on their coaching and how this could be improved.

7.9. Are my coaching sessions confidential?

Yes, coaching sessions are confidential. The exceptions to this are:

• If you share information with your coach which highlights a risk to your health or safety or to the health or safety of others, where sharing this information could safeguard you or others from harm.
• If you share information of an illegal nature or which could bring the University into disrepute.

7.10. What can I expect to achieve from coaching?
Many people who take part in coaching find it the most impactful development opportunity they have experienced, and are able to make progress on personal goals. If you are able to bring an open mind and a commitment to making progress, you are likely to gain clarity on what you want to achieve, and how you can do this. You may also feel more confident and improve your reflection skills.

7.11. How are coachees matched to coaches?

When you register on MentorNet to look for a coach, a number of profiles of available coaches will be displayed for you to read to help you find your best fit. The coach profile which has the highest number of matches on the ‘Skills and Expertise’ heading (this is where coaches select attributes that best describe what they bring and coachees select attributes which best describe what they would like in their coach) will appear at the top of the list. You can then browse the list and select the profile which you feel will be the best match. You can also simply browse all coaches, or search for a coach by name (but this will include coaches who may not be available until a later date).

7.12. What happens when I am matched with a coach and ready to start my coaching?

You and your coach will arrange an initial meeting by phone or in person which is sometimes called a ‘chemistry’ meeting and gives you both a chance to feel confident that this will be a productive working relationship. You will use this meeting to establish how you will work together, e.g. how often, where and for how long you will meet, how you will communicate. This is a chance to get to know each other and feel confident you know what to expect from coaching. It is an opportunity to discuss your overall purpose for the coaching, and any goals you hope to achieve. Occasionally, after listening to you, a coach may suggest an alternative to coaching that may suit you better.

7.13. I had coaching last year and found it really useful, can I get more?

We have a small pool of coaches for a large workforce so staff can only access one programme of coaching through the OCN every two years. We would recommend buddying up with a colleague and doing some ‘peer coaching’, and please do let colleagues know that you found coaching useful, so we can keep building and expanding the network.

7.14. Who keeps notes of sessions?

Session notes are optional. We encourage you to take your own notes of any learning and actions (if you wish, you can save these securely on MentorNet). Your coach will probably take some notes too – this varies from coach to coach – to help them coach you effectively. If there is something you want your coach to note, or do not want them to note, just say. Coaching notes are confidential to you and your coach and will be maintained/kept and destroyed in accordance with the Data Protection Act and University policy.
7.15. What will my coach ask me about?

Your coach will ask you about the goals you have for your coaching, and the current context which makes these goals important to you. Your coach may ask you to talk more about your working relationships, your strengths and skills and what you find challenging, and what resources you have. Your coach may ask you to expand on topics or ideas you have raised, to enhance your understanding of the situation and your options.

7.16. What if I decide to leave the university?

If you leave the University during your coaching, you will need to discuss with your coach whether you will complete your coaching sessions (if you have just started your coaching this will probably not be possible). Sometimes coaching leads us to think deeply about our role and how well this suits us. If your coaching leads you to find another role which better suits you, outside of the University, we wish you all the best with your next steps – we believe helping our staff build their careers is good for the University and good for individuals – maybe you will bring your new experiences, skills and ideas back to work with us again in the future.

7.17. What happens if my coach leaves the university?

If your coach leaves the university during your coaching programme, we hope that they will have time to complete your coaching sessions before they leave; your coach will discuss options with you. If you have only just started your coaching, you will be able to use MentorNet to find a new coach.

7.18. What if I can’t attend a coaching session?

If you are unable to attend a coaching session, you need to inform your coach. If you are unable to continue with your coaching, e.g. due to long term ill health, or to a change in role, you will need to inform your coach. If possible, amend / delete your coachee profile and please inform the Oxford Learning Institute.

7.19. What if my coach can’t attend our planned coaching sessions?

Your coach should let you know as soon as possible if they are unable to attend a planned session so that you can rearrange. In the unlikely event that your coach cannot continue coaching you (e.g. due to long-term ill health or a change in role), and you have just started your coaching sessions, you will be able to use MentorNet to find a new coach. If you are having difficulties getting in touch with your coach, please contact the Oxford Learning Institute.

7.20. Where should coaching sessions be held?

Coaching sessions should be held in a place you feel comfortable. Ideally this will be in a private space without interruptions or anyone able to overhear conversations. However, some people prefer to meet in café locations and enjoy a background hum – as long as you
and your coach can both focus on the conversation, this is fine. You may prefer to meet in the building where you work, or you may prefer to find a space away from your usual environment. If you or your coach know of available suitable rooms within the University, that may be your best choice. We hope to collect information on suitable spaces for coaching conversations in future. If you and your coach are happy and prepared to have one or more coaching sessions by Skype or telephone, this can be a time-saving approach.

7.21. What happens when the coaching sessions have finished?

The final session is a great time to review progress over the sessions and look ahead to next steps beyond the coaching, and how you will embed your learning and continue to ‘self coach’ going forwards. You may want to discuss your insights with your manager. You will be sent an evaluation to complete on your coaching experience – please do take a few minutes to complete this. Your coachee profile will no longer be active to allow other staff to access the coaching programme.