EN - Getting Started with MentorCity

- Basic Set Up - Quick Start
- Advanced Set Up

Basic Set Up - Quick Start

Quick Start

If your program already has access to the virtual mentoring platform and you're looking for a basic configuration to get started, you're in the right place.

> ℹ️ The basic configuration we'll cover here is **specifically tailored for 1:1 matches and interactions.** This means your program will be focused on **fundamental usage of the virtual mentoring platform without incorporating additional resources, courses, discussions, events, announcements, or group mentoring.** The platform orientation will be the only available course. Moreover, with this basic configuration, both mentors and mentees will have default MentorCity profile fields and sections displayed, with no custom fields added. **The primary functionality of this setup revolves around enabling mentors and mentees to easily book and attend online mentoring meetings.**

Each of the following steps will be accompanied by a hyperlink leading to the corresponding topic training article, providing you with a visual guide throughout the setup process.

Steps:

1. Create your back up program administrators

2. Edit your organization's profile:

- Add your brand colors
- Add or change your logo
- Choose the labels for the name and email address appearing on system generated emails
- Identify your preferred terminology for the role of mentors, mentees and the action of mentoring
- Define mentors/mentees' permissions for events, resources, and discussion creation

3. Determine and add your program policies and the Mentor City terms of use to the company policy tab

4. Build the mentoring agreement

5. Activate or deactivate the self-initiated matching feature

6. Email your invitation link to mentors and mentees and include all or part of the below onboarding supports:

- The Mentors & Mentees Onboarding Essentials article
- The Mentors & Mentees Onboarding Essentials handout

7. Track registrations and profile completion progress

8. Match mentors and mentees

9. Generate reports regularly to track your mentoring match's progress

> ℹ️ **If you have questions or need further support, please contact our Support Team:**
> **support@mentoringcanada.ca**

Advanced Set Up

Advanced Start

The advanced set-up offers extensive customizations, providing mentors and mentees with an enriched mentoring experience through a wide array of features.

> With advanced customizations, program administrators gain the ability to personalize profile fields and sections for mentors and mentees. Additionally, they can offer various resources, mentoring activities, discussions, events, and announcements, while also enabling the valuable option of group mentoring.

To explore the process of implementing these advanced customizations, we've outlined the essential steps in the topic training article linked below each section. These step-by-step guides will assist you in tailoring the platform to meet your program's specific needs, ensuring a highly personalized and effective mentoring journey for all participants.

Steps:

1. Create your back-up program administrators

2. Edit your organization's profile:

- Add your brand colors
- Add or change your logo
- Choose the labels for the name and email address appearing on system generated emails
- Identify your preferred terminology for the role of mentors, mentees and the action of mentoring
- Define mentors/mentees' permissions for events, resources, and discussion creation

3. Determine and add your program policies and the Mentor City terms of use to the company policy tab

4. Build the mentoring agreement

5. Manage profile sections, fields & drop-down menus and competencies

6. Create profile custom fields (if applicable)

7. Set up your message filters

8. Customize the program evaluation

9. Create and send surveys

10. Define resources' categories and build the resource center

11. Design courses & mentoring activities

12. Activate & customize the badge reward system

13. Manage system generated messages

14. Onboard mentors & mentees and share all or part of the below onboarding supports:

- The Mentors & Mentees Onboarding Essentials article
- The Mentors & Mentees Onboarding Essentials handout

15. Define the maximum number of mentors & mentees per match

16. Match mentors & mentees using of the one or more of the following methods:

- Youth-initiated match
- Speed match
- Manual match

17. Create group mentoring matches

18. Post announcements on the dashboard

19. Monitor mentoring matches' progress & interactions through reports.

> ℹ️ **If you have questions or need further support, please contact our Support Team: support@mentoringcanada.ca**