# Customize Mentors/Mentees Profile Fields & Drop-down Menus
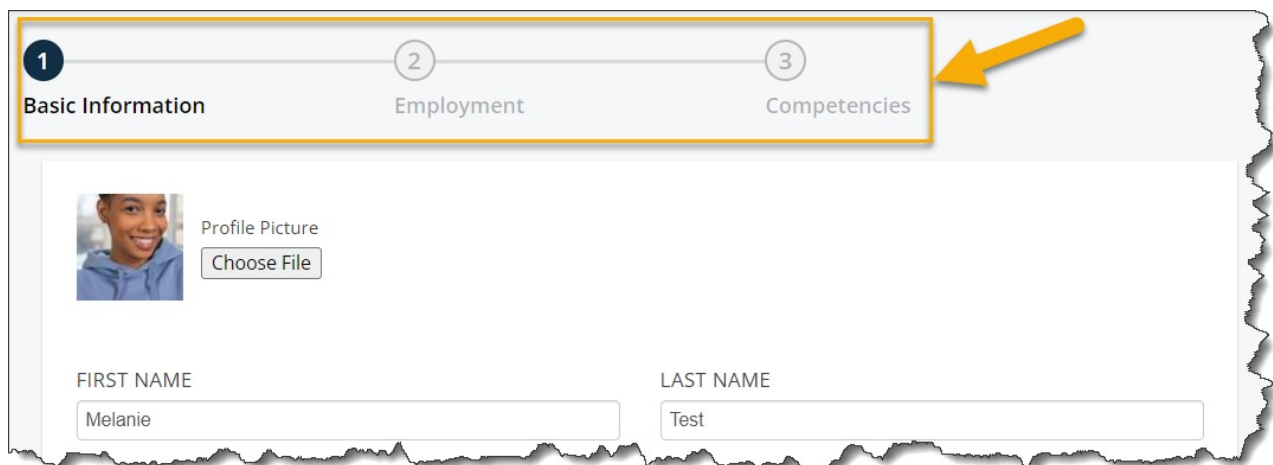
## Context

The virtual mentoring platform includes pre-defined fields and drop-down menus within the mentors' and mentees' profiles. Program administrators have the flexibility to customize and select the specific sections and fields that appear on these profiles. This allows for a tailored and personalized experience for mentors and mentees.

**The profile is composed of three sections:**

**1.** Basic (mandatory section that cannot be hidden however fields on this section can be hidden or customized)
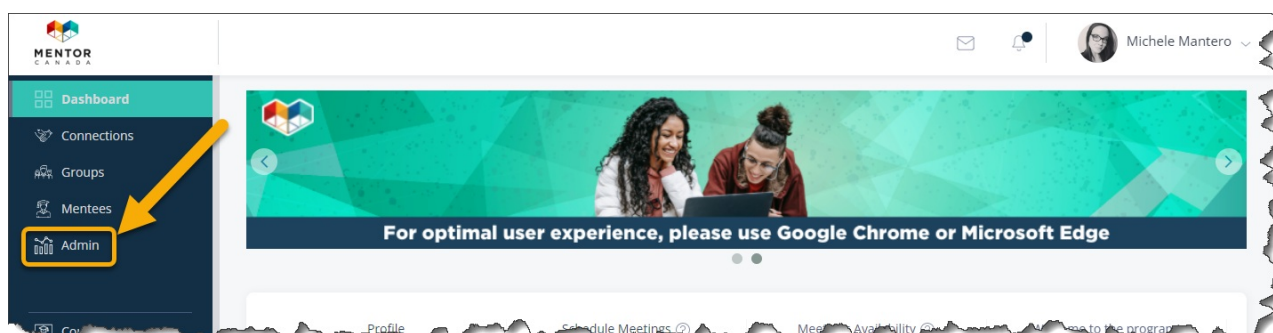
**2.** Employment

**3.** Competencies



It is also important to note that the following fields are utilize by the system algorithm as matching criteria to provide the most accurate match recommendations:
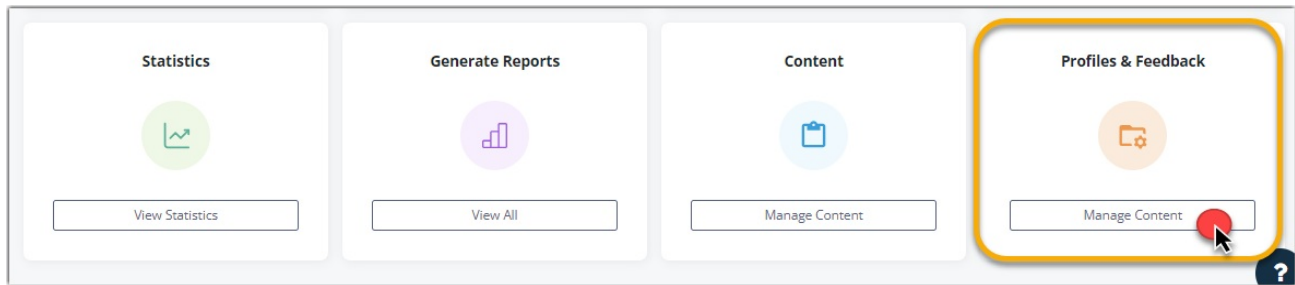
- Competencies (Competencies)
- Specialized Skills/Development Areas (Basic)
- Industries (Employment)
- Job function (Employment)
- Language (Basic)
- Meeting Locations (Basic)

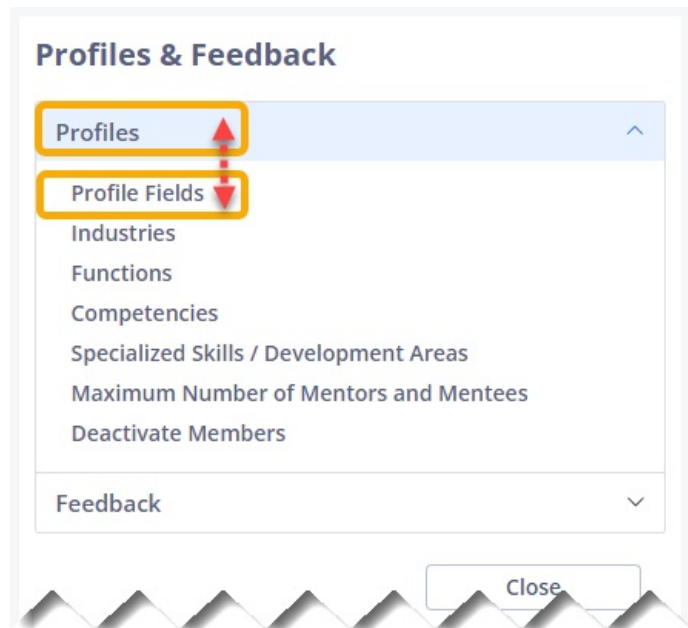## Step 1 – Define Sections & Fields to Display

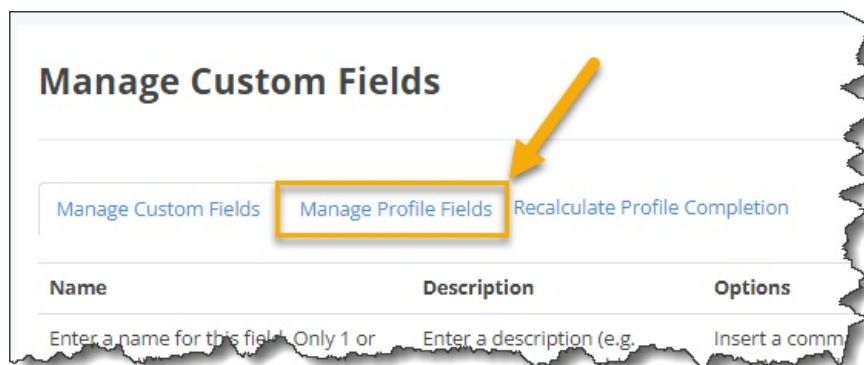**1.0** Click the "Admin" tab on the left-hand side of the platform.

**1.1** From the administrator dashboard, navigate to the "Profiles & Feedback" tile located on the third row, and click on "Manage Content" to access the corresponding section.
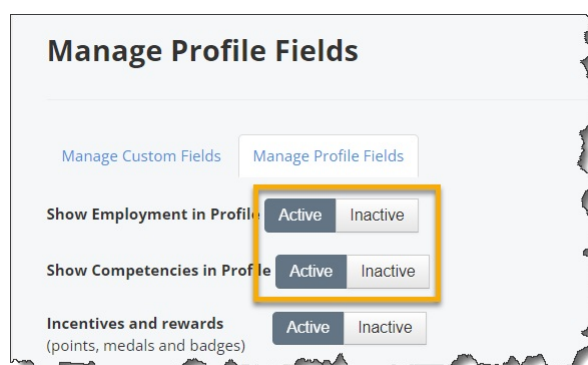


**1.1.1** A new dialog box will appear. Expand the selections by clicking on "Profiles" and subsequently choose "Profile Fields"



**1.2** Click the "Manage Profile Fields" tab.



**1.3** Click `Active` or `Inactive` for each section.

Also make a selection here to allow or prevent your program participants to have both mentoring roles.

**1.4** Check boxes under the "Show in Profile" column for each field you wish to display on your user's profile. Leave the boxes unchecked to hide the field.



**1.5** Click `Update Fields`



# Step 2 – Create Custom Profile Fields

**2.0** Click the "Admin" tab on the left-hand side of the platform.

**2.1** From the administrator dashboard, navigate to the "Profiles & Feedback" tile located on the third row, and click on "Manage Content" to access the corresponding section.
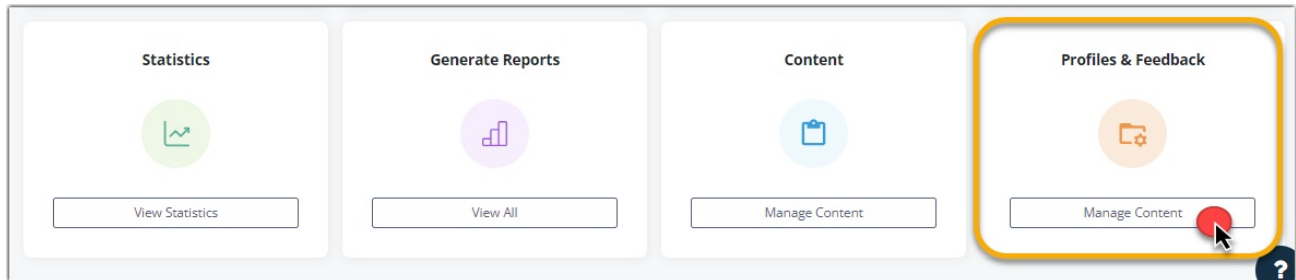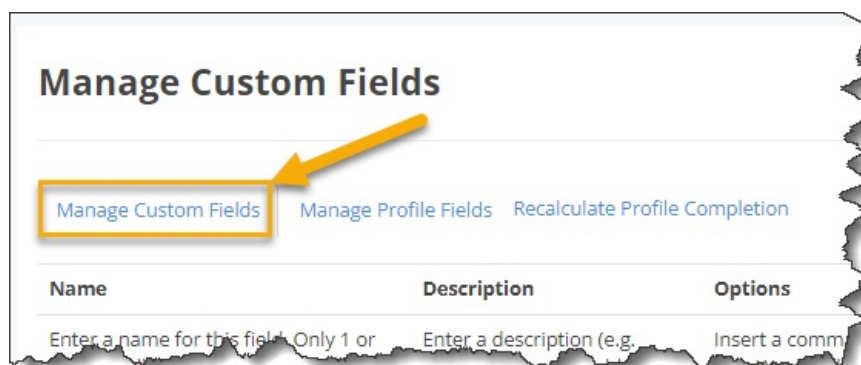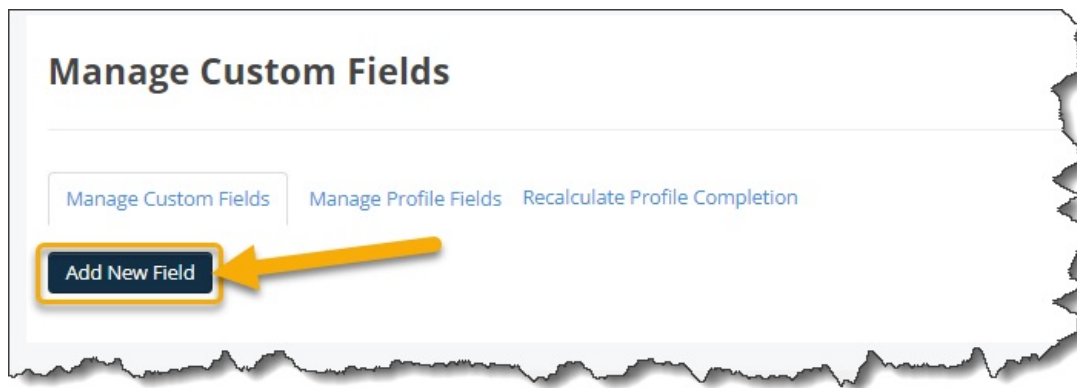


**2.1.1** A new dialog box will appear. Expand the selections by clicking on "Profiles" and subsequently choose "Profile Fields"



**2.2** Click on "Manage Custom Fields".



**2.3** Click  Add New Field

**Manage Custom Fields**

Manage Custom Fields    Manage Profile Fields    Recalculate Profile Completion

Add New Field

**2.4** Create the new custom field by entering:

Add Profile Field                                                    ×

**Name:** A
Enter a name for this field. Only 1 or
2 words allowed (e.g. Meeting Times)    English    | Pronouns |

| Pronoms |
French

**Description:** B
Enter a description (e.g. When are
you available                           | Make one selection |
to meet?)                               English

| Faites une sélection |
French

**A) A Field Name**
**B) A Description, i.e.** "Make one selection"

Add Profile Field                                                    ×

**Options:** C
Insert a comma after each options
(e.g. Weekends, Evenings, Lunch).       | she/her/hers,he/him/his,they |
Leave section blank if you would like   English
text entered (e.g a membership          | elle/elle,il/lui/ses,ils/eux/leur |
number)                                 French

**Tips:** D
Enter how you would like to remind      | n/a |
your members to complete this field     English
(e.g. Enter                             | n/a |
your meeting times)                     French

**C) Options:** Insert a comma after each options or leave blank if you would like text entered.
**D) Tips:**  Enter instructions/tips on how you would like to your members to complete this field.

**E) Role:** Indicate which role will have access to this field.
**F) Order:** Select the order in which this field will be display if you create multiple custom fields.

**2.5** Click the additional and optional selections to format the new field. (mandatory, include on report etc....)



**2.5.1** *Optional:* When creating a custom field, there is now an option to allow members to attach a file to the field. For instance, you could create a field with this option for mentors to attached their resume to their profile.

**2.6** Click `Save`



**2.6.1** The new field now appears under the "Manage Custom Fields" section. From here, you can make modifications to the custom field and click on `Update Fields`, or, add a new custom field by clicking on `Add New Field`.

**2.6.2** Voila! The new custom field is now display on your mentors and/or mentees' profile.



# Delete/Change a Custom Profile Field

## Delete

**2.7** To delete a custom profile field, from the administrator dashboard, navigate to the "Profiles & Feedback" tile located on the third row, and click on "Manage Content" to access the corresponding section.

**2.7.1** A new dialog box will appear. Expand the selections by clicking on "Profiles" and subsequently choose "Profile Fields"



**2.7.2** You will be brought to the "Manage Custom Fields" tab where all your existing custom profile fields are displayed.



**2.7.3** Find the custom field you want to delete and click `Delete` on the right-hand side of the page.

**2.7.4** You will be ask to confirm, click `OK`.



## Change

**2.8** To modify a custom profile field, from the administrator dashboard, navigate to the "Profiles & Feedback" tile located on the third row, and click on "Manage Content" to access the corresponding section.



**2.8.1** A new dialog box will appear. Expand the selections by clicking on "Profiles" and subsequently choose "Profile Fields"



**2.8.2** You will be brought to the "Manage Custom Fields" tab where all your existing custom profile fields are displayed.

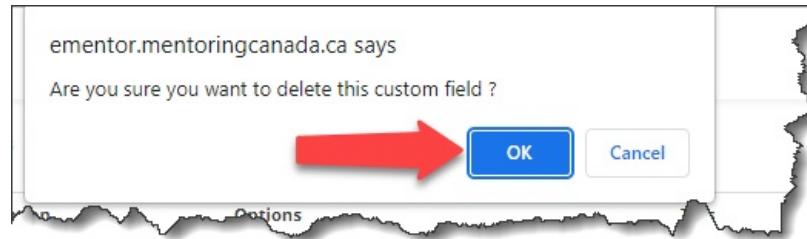| Name | Description | Options | Tips | Profile | Report |
|---|---|---|---|---|---|
| Enter a name for this field. Only 1 or 2 words allowed (e.g. Meeting Times) | Enter a description (e.g. When are you available to meet?) | Insert a comma after each options (e.g. Weekends, Evenings, Lunch. Leave section blank if you would like text entered (e.g a membership number) | Enter how you would like to remind your members to complete this field (e.g. Enter your meeting times) | | |

| | English | Pronouns | Make one selection | she/her/hers,he/him/his,they | n/a | ☑ | ☑ | Delete |
| | French | Pronoms | Faites une sélection | elle/elle,il/lui/ses,ils/eux/leur | n/a | | |

| Role: | Mentor and Mentee ▾ | Mandatory Field | ☑ | Appear in Search | ☐ | Admin Only | ☐ |
| Order | 1 ▾ | Single Select | ☐ | Allow Input | ☐ | Basic Field | ☐ |
| Parent | ▾ | Parent Options | Select Option... | Support Attachment | ☐ | | |

| | English | Test | Please attached your resum | | | ☑ | ☑ | Delete |
| | French | Test | SVP joindre votre cv | | | | |

| Role: | Mentor and Mentee ▾ | Mandatory Field | ☑ | Appear in Search | ☐ | Admin Only | ☐ |
| Order | 2 ▾ | Single Select | ☐ | Allow Input | ☐ | Basic Field | ☐ |
| Parent | ▾ | Parent Options | Select Option... | Support Attachment | ☑ | | |

**2.8.3** Modify any of the custom fields on this page. For example, if I wanted to make the "Pronouns" field a single select field, I would check the "Single Select" box on this page. I could also change the "Description" field by writing over the current description.

| Name | Description | Options | Tips | Profile | Report |
|---|---|---|---|---|---|
| Enter a name for this field. Only 1 or 2 words allowed (e.g. Meeting Times) | Enter a description (e.g. When are you available to meet?) | Insert a comma after each options (e.g. Weekends, Evenings, Lunch). Leave section blank if you would like text entered (e.g a membership number) | Enter how you would like to remind your members to complete this field (e.g. Enter your meeting times) | | |

| | English | Pronouns | Make only one selection | she/her/hers,he/him/his,they | n/a | ☑ | ☑ | Del |
| | French | Pronoms | Faites seulement une sélect | elle/elle,il/lui/ses,ils/eux/leur | n/a | | |

| Role: | Mentor and Mentee ▾ | Mandatory Field | ☑ | Appear in Search | ☐ | Admin Only | ☐ |
| Order | 1 ▾ | Single Select | ☑ | Allow Input | ☐ | Basic Field | ☐ |
| Parent | ▾ | Parent Options | Select Option... | Support Attachment | ☐ | | |

**2.8.4** Scroll down to the bottom of the page and click `Update Fields` to save your changes.

| | English | Test | Please attached your resum | | | ☑ | ☑ | Delete |
| | French | Test | SVP joindre votre cv | | | | |

| Role: | Mentor and Mentee ▾ | Mandatory Field | ☑ | Appear in Search | ☐ | Admin Only | ☐ |
| Order | 2 ▾ | Single Select | ☐ | Allow Input | ☐ | Basic Field | ☐ |
| Parent | ▾ | Parent Options | Select Option... | Support Attachment | ☑ | | |

Update Fields

Add New Field

**Important: Multiple Choice Answers Field - Changing Listed Options:** If you intend to modify the options

### Example

I created a Test field with the options of : Option 1, Option 2, Option 3.



On my profile, **I selected "option 2"** on the list **which is the second option listed**.



Now, I will go back to the administrator dashboard to modify the listed options.

I will add an option called "NEW" between "option 1" and "option 2".  The "NEW" option becomes the second option listed and "option 2" becomes the third option listed.



When I return to my profile, we can now see that my selection has been converted to "NEW".

The system matches the option with the sequence previously selected which was the second option listed.  Thus, as per the changes made on the administrator dashboard, the second selection is now "NEW".

To prevent this from happening, **when you create a new option**, make sure to add it to the end of the current list.



> ⚠ In the event that you need to remove an existing option that would impact the sequence of selections, it is important to communicate this change to mentors and mentees. It is recommended to inform them that they should update the affected field accordingly. This can be done by making an announcement or sending out a mass communication to ensure that all relevant parties are aware of the necessary action they need to take.

## Step 3 – Define your Fields Drop-Down Menus

The virtual mentoring platform offers a wide range of built-in fields that can be showcased on mentors' and mentees' profiles. Program administrators have the flexibility to modify the available options within certain built-in fields. This allows for greater customization and adaptability to meet the specific needs of the mentoring program.

> ℹ **Here is the list of built-in fields which allows program administrator to modify provided options:**
> Specialized Skills / Development Area (Basic section)
> Industries (Employment section)
> Functions (Employment section)
> Competencies (Competencies section)

**3.0** Click the "Admin" tab on the left-hand side of the platform.



**3.1** From the administrator dashboard, navigate to the "Profiles & Feedback" tile located on the third row, and click on "Manage Content" to access the corresponding section.

**3.1.1** A new dialog box will appear. Expand the selections by clicking on "Profiles" and subsequently choose one of the field that requires modifications to the built-in options. In this example we will click on "Industries". Refer to the highlighted section in the accompanying image to identify other fields that offer the ability to change the built-in options.



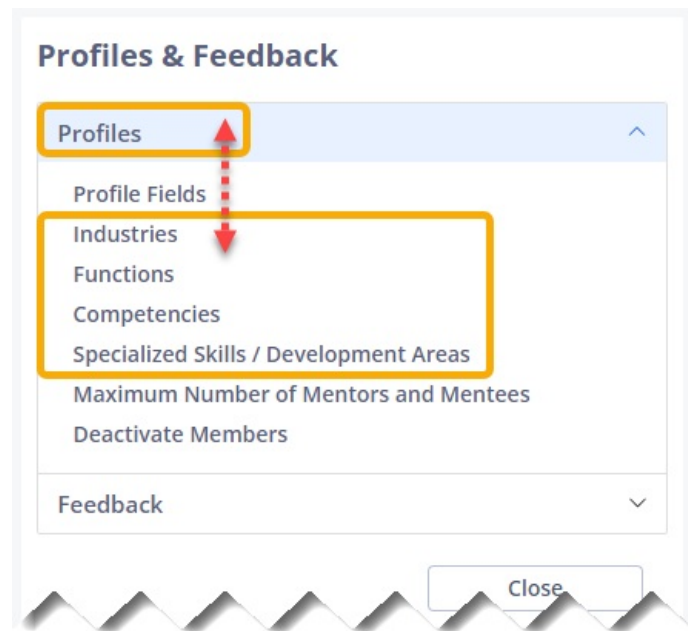**3.2** Click `Delete` for each option you do not wish to keep or simply type over to add a new option and their translation.



**3.3** Click `Add another industry` located at the bottom of the page to add new options.



**3.4** Click `Update Industries` to save your changes.

**3.5** Follow the same steps **3.1** to **3.4** to modify the pre-built options of the "Functions" and "Specialized Skills/Development Areas" fields.

## Step 4 – Create or Update the Competencies (self-evaluation)

Competencies can also be updated and the page where the update is done looks different from the one showed in the section above (step 3). However, the process is quite similar and intuitive.

**4.0** Click the "Admin" tab on the left-hand side of the platform.



**4.1** From the administrator dashboard, navigate to the "Profiles & Feedback" tile located on the third row, and click on "Manage Content" to access the corresponding section.



**4.1.1** A new dialog box will appear. Expand the selections by clicking on "Profiles" and subsequently choose "Competencies"

**4.2** Click `Edit` or `Delete` under the "Action" column to modify or delete the built-in competencies.



**4.3** If you are editing a current competencies, make the changes in the name and/or description and click `Save`.



**4.4** To add a new competency, click `New Competency`.

## Manage Competencies

You must have one or more Competencies for the system to work properly.

| Name | Description | Actions |
|------|-------------|---------|
| Emotional Intelligence | Self awareness, emotional control, interpersonal relationship | Show Edit Delete |
| Teamwork | Collaboration, participation, commitment, problem solving | Show Edit Delete |
| Networking | Approaching people, building rapport, following-up, maintaining relationships | Show Edit Delete |
| Presentation skills | Public speaking, confidence, learning styles, engaging audience | Show Edit Delete |
| Listening skills | Paraphrasing, asking questions, summarizing, nodding, smiling | Show Edit Delete |
| Giving and receiving feedback | Constructive, specific, clear, providing examples, cross-cultural competence | Show Edit Delete |
| Effective communication | Verbal (what you say), nonverbal (how you look e.g. eye contact, appearance),... | Show Edit Delete |

New Competency

**4.4.1** Enter the new competency and description, then click Save .

## New Competency

* Name (English)        Resume Building

* Nom (Français)

* Description (English)  Description here

* Description (Français)

Save    Cancel

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

⟲Revision #61
★Created Wed, Jul 7, 2021 8:37 PM by Michèle Mantero
✎Updated Mon, Jan 29, 2024 10:39 PM by Michèle Mantero