

Customize Mentors/Mentees Profile Fields & Drop-down Menus

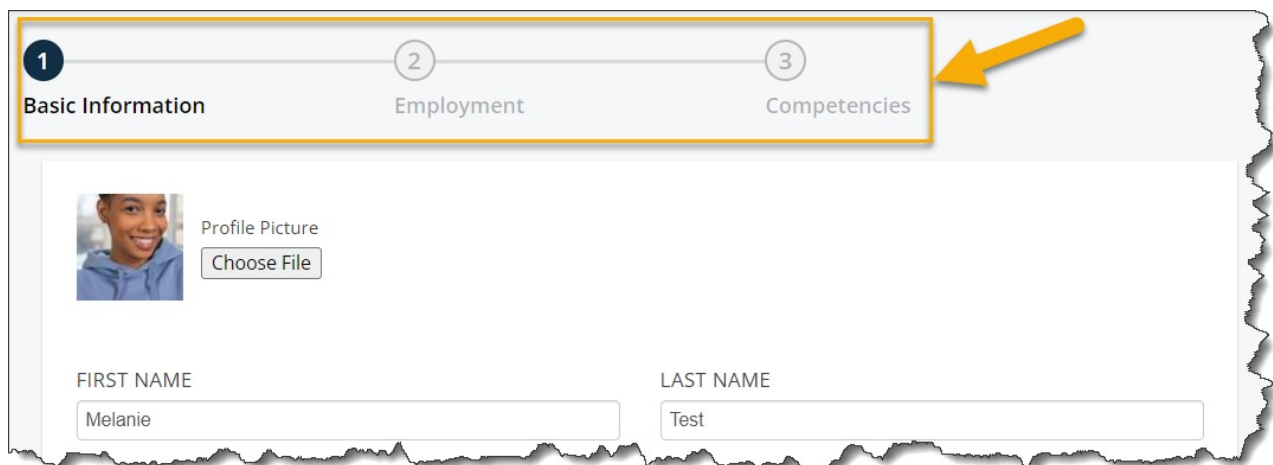
- [Context](#)
- [Define Sections & Fields to Display](#)
- [Create Custom Profile Fields](#)
 - [Delete/Change a Custom Profile Field](#)
- [Define your Fields Drop-Down Menus](#)
- [Create or Update the Competencies \(self-evaluation\)](#)

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



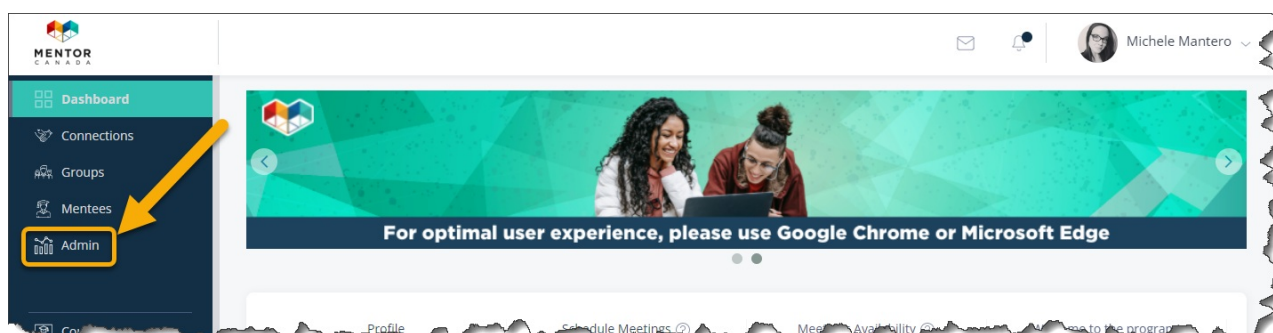
The screenshot shows a profile form with three sections: 1. Basic Information, 2. Employment, and 3. Competencies. The Basic Information section is highlighted with a yellow box and a yellow arrow pointing to it. The form includes a profile picture upload area with a 'Choose File' button, and fields for 'FIRST NAME' (Melanie) and 'LAST NAME' (Test).

It is also important to note that the following fields are utilized by the system algorithm as matching criteria to provide the most accurate match recommendations:

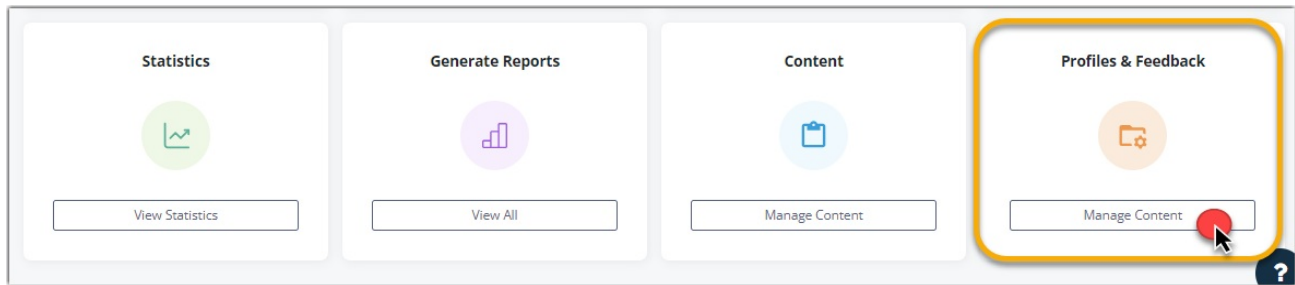
- Competencies (Competencies)
- Specialized Skills/Development Areas (Basic)
- Industries (Employment)
- Job function (Employment)
- Language (Basic)
- Meeting Locations (Basic)

Step 1 - Define Sections & Fields to Display

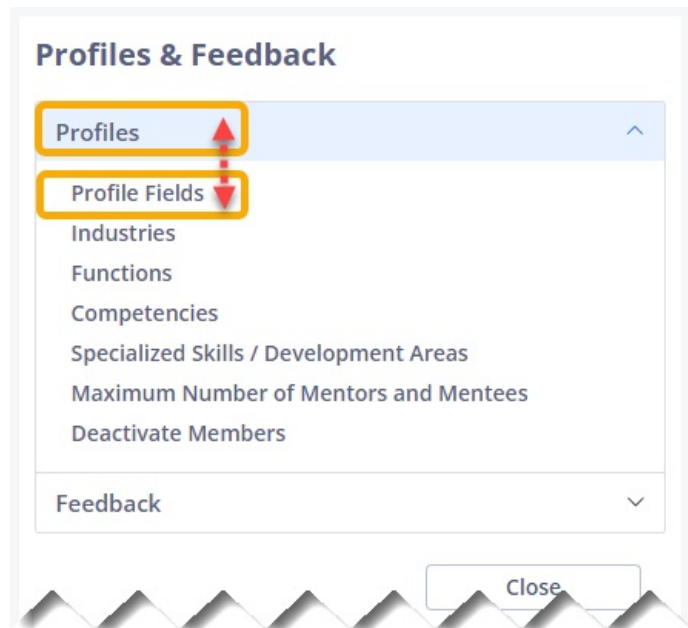
- 1.0 Click the "Admin" tab on the left-hand side of the platform.



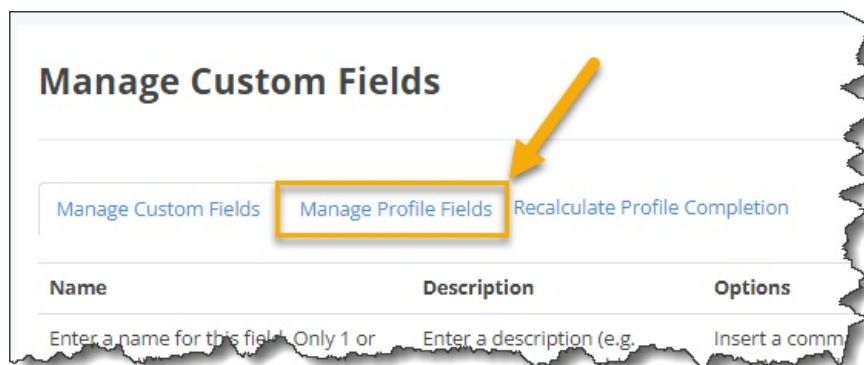
1.1 From the administrator dashboard, navigate to the "Profiles & Feedback" tile located on the third row, and click on "Manage Content" to access the corresponding section.



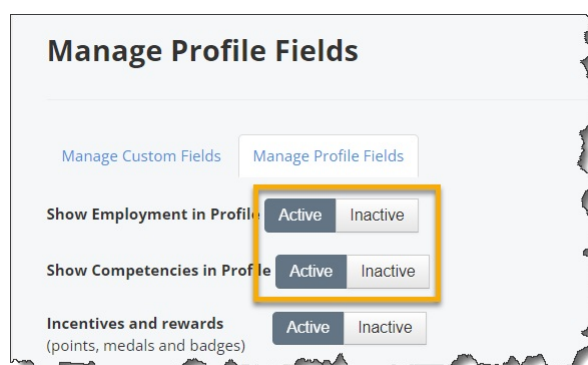
1.1.1 A new dialog box will appear. Expand the selections by clicking on "Profiles" and subsequently choose "Profile Fields"



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.

☒ Users can choose to be both mentor and mentee at same time

Industry	English	Industry	<input checked="" type="checkbox"/>
	French	Secteur d'activité	

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.

Profile Field	Name	Show in Profile	
Enter a name for this field. Only 1 or 2 words allowed (e.g. Meeting Times)			
Meeting Locations	English	Meeting locations	<input type="checkbox"/>
	French	Villes pour les rencontres	
Skills	English	Specialized Skills	<input checked="" type="checkbox"/>
	French	Compétences spécialisées	
Development Areas	English	Development Areas	<input checked="" type="checkbox"/>
	French	Domaines de développement	
Gender	English	Gender	<input type="checkbox"/>
	French	Sexe	
Language	English	Languages	<input checked="" type="checkbox"/>
	French	Langues	

1.5 Click [Update Fields](#)

☒ Users can choose to be both mentor and mentee at same time

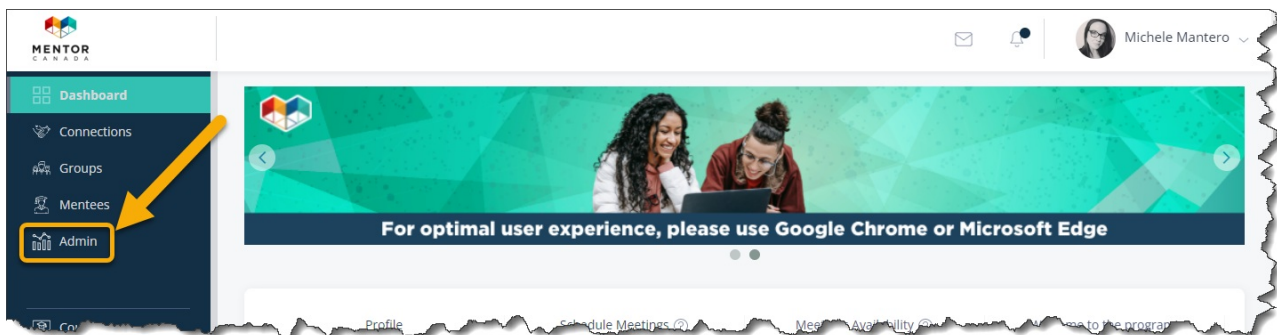
Industry	English	Industry	<input checked="" type="checkbox"/>
	French	Secteur d'activité	

Job Function	English	Job Function	<input checked="" type="checkbox"/>
	French	Poste occupé	

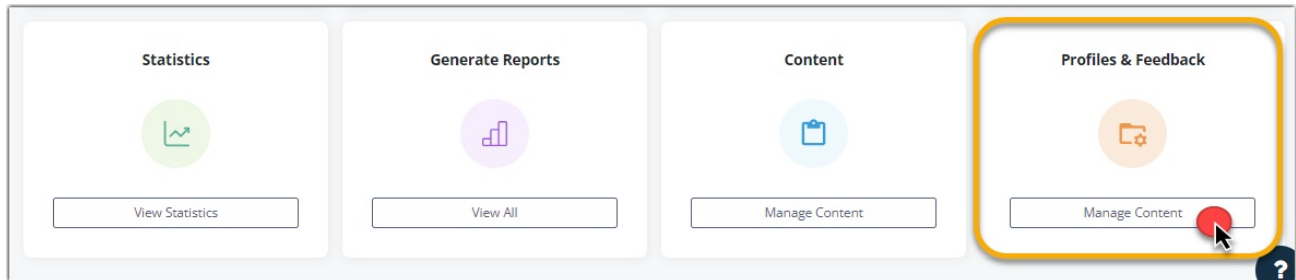
[Update Fields](#)

Step 2 - Create Custom Profile Fields

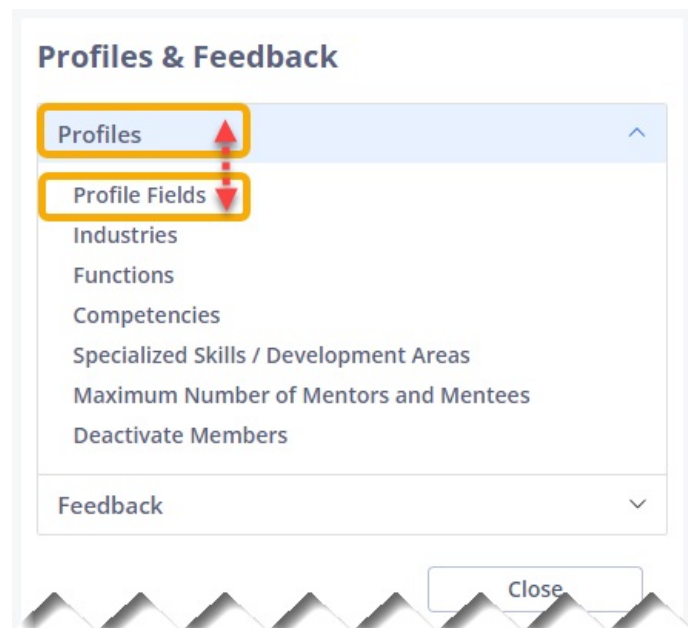
2.0 Click the “Admin” tab on the left-hand side of the platform.



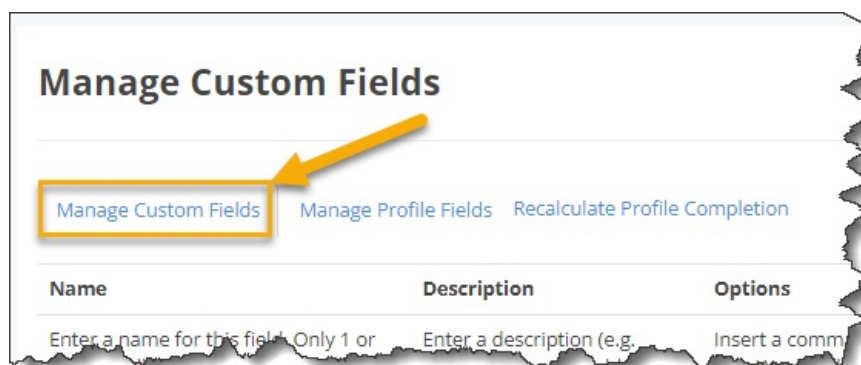
2.1 From the administrator dashboard, navigate to the "Profiles & Feedback" tile located on the third row, and click on "Manage Content" to access the corresponding section.



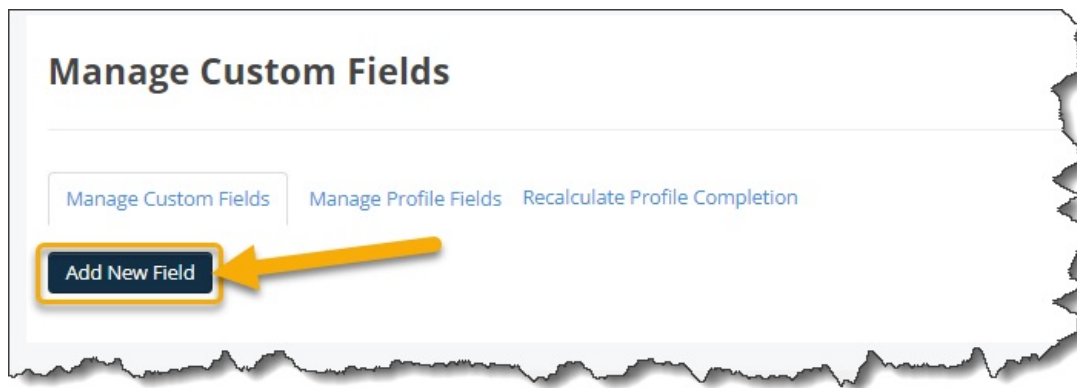
2.1.1 A new dialog box will appear. Expand the selections by clicking on "Profiles" and subsequently choose "Profile Fields"



2.2 Click on "Manage Custom Fields".



2.3 Click [Add New Field](#)



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)

Pronouns

English

Pronoms

French

Description: **B**
Enter a description (e.g. When are you available to meet?)

Make one selection

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). Leave section blank if you would like text entered (e.g a membership number)

she/her/hers, he/him/his, they

English

elle/elle, il/lui/ses, ils/eux/leur

French

Tips: **D**
Enter how you would like to remind your members to complete this field (e.g. Enter your meeting times)

n/a

English

n/a

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.

Add Profile Field [Close]

Role: **E**
Please select a role
Mentor and Mentee

Order: **F**
Please select the order that you would like this field displayed in
1

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....)

Add Profile Field [Close]

☒ Would you like this field displayed in your members public profile?

☒ Would you like to make it mandatory for your members to complete this field?

☒ Would you like this field included in the downloadable reports?

☐ Would you like this field to be included in the Find Mentor and Find Mentee search?

☐ Would you like this field only to be displayed for administrators? Mentees and mentors won't see this field on their profile, and they won't be able to select options.

☐ Would you like your members to only select one option?

☐ Would you like your members to enter their own options - if they aren't included in the drop-down menu?

☐ Would you like to make it basic field for your members?

☐ Would you like to allow your members to attach a file?

☐ Is this a child?

Save **Cancel**

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.

Add Profile Field

Mentees and mentors won't see this field on their profile, and they won't be able to select options.

☐ Would you like your members to only select one option?

☐ Would you like your members to enter their own options - if they aren't included in the drop-down menu?

☐ Would you like to make it basic field for your members?

☒ Would you like to allow your members to attach a file?

☐ is this a child?

Save Cancel

Single Select ☐

Please attached your resume

Choose File

*Pronouns

Make one selection

she/her/hers

LinkedIn

michele/mantero

☒ Appear in search results

By removing this checkmark, you will not show up in regular search results for this program. The program admin person may still match you.

Save and go to the Employment section

2.6 Click [Save](#)

Add Profile Field

Mentees and mentors won't see this field on their profile, and they won't be able to select options.

☐ Would you like your members to only select one option?

☐ Would you like your members to enter their own options - if they aren't included in the drop-down menu?

☐ Would you like to make it basic field for your members?

☐ Would you like to allow your members to attach a file?

☐ is this a child?

Save Cancel

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](#).

[Manage Custom Fields](#)
[Manage Profile Fields](#)
[Recalculate Profile Completion](#)

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 <input type="text" value="Pronouns"/>	<input type="text" value="Make one selection"/>	<input type="text" value="she/her/hers,he/him/his,they"/>	<input type="text" value="n/a"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <input type="button" value="Delete"/>
French <input type="text" value="Pronoms"/>	<input type="text" value="Faites une sélection"/>	<input type="text" value="elle/elle,il/lui/ses,ils/eux/leur"/>	<input type="text" value="n/a"/>		
Role: <input type="text" value="Mentor and Mentee"/>	Mandatory Field <input checked="" type="checkbox"/>		Appear in Search <input type="checkbox"/>	<input type="checkbox"/>	Admin Only <input type="checkbox"/>
Order <input type="text" value="1"/>	Single Select <input type="checkbox"/>		Allow Input <input type="checkbox"/>	<input type="checkbox"/>	Basic Field <input type="checkbox"/>
Parent <input type="text"/>	Parent Options <input type="text" value="Select Option..."/>		Support Attachment <input type="checkbox"/>	<input type="checkbox"/>	

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

Dashboard
Connections
Groups
Mentors
Mentees
Admin

Courses
Events
Resources
Discussions

Access Connections
Get The App
Terms of Use
Privacy Policy

Powered by

Maximum number of **Mentees** at the same time
Maximum number of **Mentors** at the same time

Specialized Skills
List the areas you feel comfortable Mentoring someone in.

***Pronouns**
Make one selection

he/him/his
other
prefer not to answer
she/her/hers
they/them/theirs

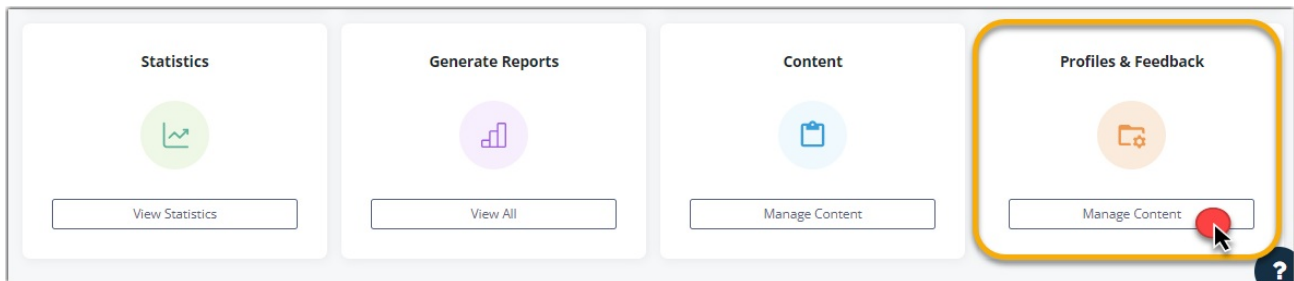
☒ **Appear in search results**

By removing this checkmark, you will not show up in regular search results for this program. The program admin person may still match you.

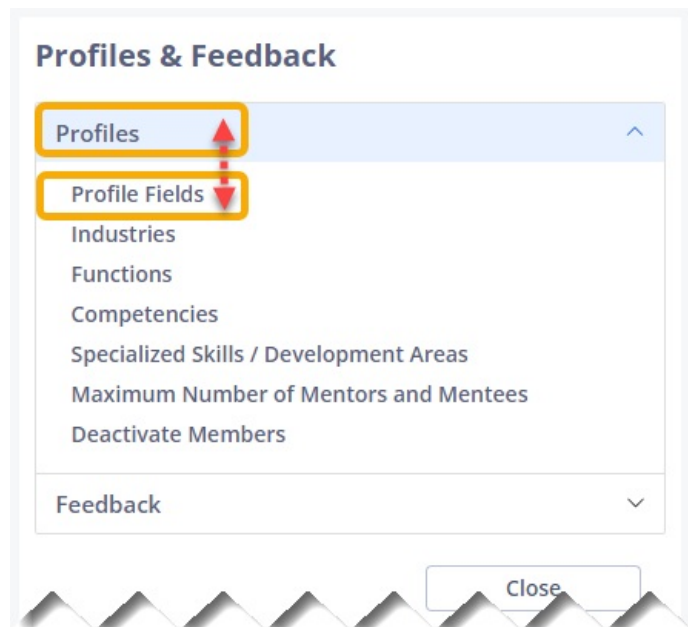
Delete/Change a Custom Profile Field

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.

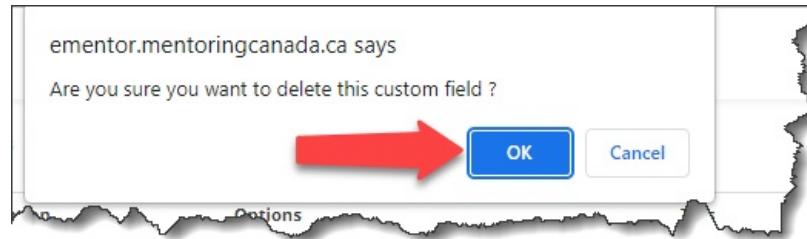
Manage Custom Fields
Manage Profile Fields
Recalculate Profile Completion

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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Delete
French: Pronoms	Faites une sélection	elle/elle..il/lui/ses..ils/eux/leur	n/a		
Role: Mentor and Mentee	Mandatory Field	<input checked="" type="checkbox"/>	Appear in Search	<input type="checkbox"/>	Admin Only <input type="checkbox"/>
Order: 1	Single Select	<input type="checkbox"/>	Allow Input	<input type="checkbox"/>	Basic Field <input type="checkbox"/>
Parent	Parent Options	Select Option...	Support Attachment	<input type="checkbox"/>	
English: Test	Please attached your resum			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Delete
French: Test	SVP joindre votre cv				
Role: Mentor and Mentee	Mandatory Field	<input checked="" type="checkbox"/>	Appear in Search	<input type="checkbox"/>	Admin Only <input type="checkbox"/>
Order: 2	Single Select	<input type="checkbox"/>	Allow Input	<input type="checkbox"/>	Basic Field <input type="checkbox"/>
Parent	Parent Options	Select Option...	Support Attachment	<input checked="" type="checkbox"/>	

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

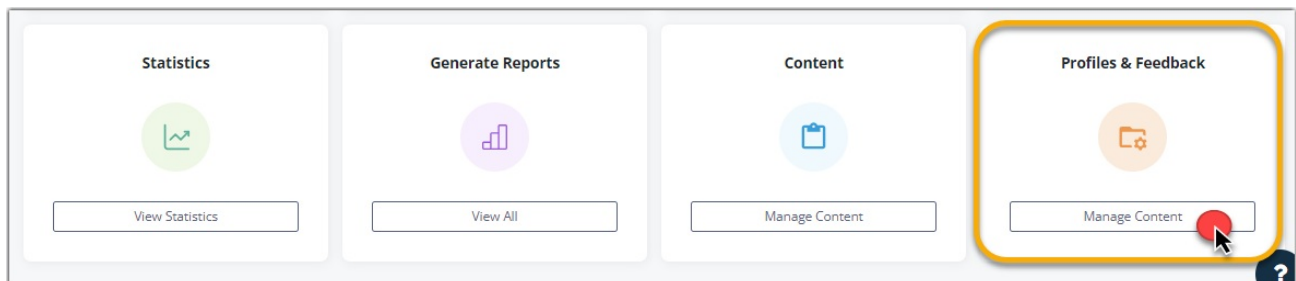
English	<input type="text" value="Test"/>	<input type="text" value="Please attached your resum"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Delete"/>
French	<input type="text" value="Test"/>	<input type="text" value="SVP joindre votre cv"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Role:	<input type="text" value="Mentor and Mentee"/>	Mandatory Field	<input checked="" type="checkbox"/>	Appear in Search	<input type="checkbox"/>	Admin Only <input type="checkbox"/>
Order	<input type="text" value="2"/>	Single Select	<input type="checkbox"/>	Allow Input	<input type="checkbox"/>	Basic Field <input type="checkbox"/>
Parent	<input type="text"/>	Parent Options	<input type="text" value="Select Option..."/>	Support Attachment	<input checked="" type="checkbox"/>	

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

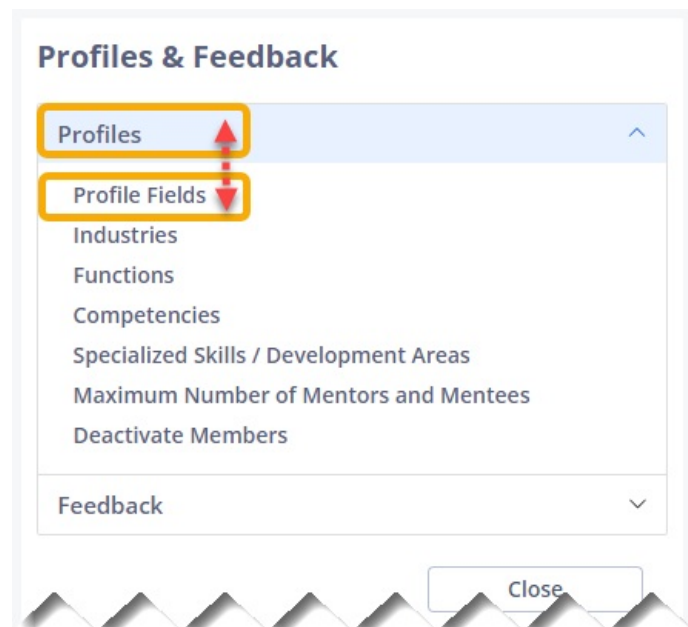


Change

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.

[Manage Custom Fields](#) [Manage Profile Fields](#) [Recalculate Profile Completion](#)

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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Delete
French: Pronoms	Faites une sélection	elle/elle, il/lui/ses, ils/eux/leur	n/a		
Role: Mentor and Mentee	Mandatory Field <input checked="" type="checkbox"/>		Appear in Search	<input type="checkbox"/>	Admin Only <input type="checkbox"/>
Order: 1	Single Select <input type="checkbox"/>		Allow Input	<input type="checkbox"/>	Basic Field <input type="checkbox"/>
Parent	Parent Options	Select Option...	Support Attachment	<input type="checkbox"/>	
English: Test	Please attached your resum			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Delete
French: Test	SVP joindre votre cv				
Role: Mentor and Mentee	Mandatory Field <input checked="" type="checkbox"/>		Appear in Search	<input type="checkbox"/>	Admin Only <input type="checkbox"/>
Order: 2	Single Select <input type="checkbox"/>		Allow Input	<input type="checkbox"/>	Basic Field <input type="checkbox"/>
Parent	Parent Options	Select Option...	Support Attachment	<input checked="" type="checkbox"/>	

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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Delete
French: Pronoms	Faites seulement une sélection	elle/elle, il/lui/ses, ils/eux/leur	n/a		
Role: Mentor and Mentee	Mandatory Field <input checked="" type="checkbox"/>		Appear in Search	<input type="checkbox"/>	Admin Only <input type="checkbox"/>
Order: 1	Single Select <input checked="" type="checkbox"/>		Allow Input	<input type="checkbox"/>	Basic Field <input type="checkbox"/>
Parent	Parent Options	Select Option...	Support Attachment	<input type="checkbox"/>	

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			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Delete
French: Test	SVP joindre votre cv				
Role: Mentor and Mentee	Mandatory Field <input checked="" type="checkbox"/>		Appear in Search	<input type="checkbox"/>	Admin Only <input type="checkbox"/>
Order: 2	Single Select <input type="checkbox"/>		Allow Input	<input type="checkbox"/>	Basic Field <input type="checkbox"/>
Parent	Parent Options	Select Option...	Support Attachment	<input checked="" type="checkbox"/>	
Update Fields					
Add New Field					

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

▲ listed in the "Options" field, it's important to note that such changes may impact the selections made in the profiles of existing mentors and mentees. Each option is associated with a specific sequence, and when modifications are made to the options that affect the sequence, the current selections in the mentor and mentee profiles will be automatically adjusted accordingly.

Example

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

English	This is a test field	Make one selection	option 1, option 2, option 3	
French	Ceci est un champ test	Faites une sélection	option 1, option 2, option 3	
Role:	Mentor and Mentee	Mandatory Field	<input type="checkbox"/>	Appear in Search
Order	3	Single Select	<input checked="" type="checkbox"/>	Allow Input
Parent		Parent Options	Select Option...	Support Attachment

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

This is a test field

Make one selection

option 2

Linkedin

michele/mantero

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.

English	This is a test field	Make one selection	option 1, NEW, option 2, opt	<input checked="" type="checkbox"/>
French	Ceci est un champ test	Faites une sélection	option 1, option 2, option 3	
Role:	Mentor and Mentee	Mandatory Field	<input type="checkbox"/>	Appear in Search
Order	3	Single Select	<input checked="" type="checkbox"/>	Allow Input
Parent		Parent Options	Select Option...	Support Attachment

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".

This is a test field

Make one selection

NEW

Linkedin

michele/mantero

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

English This is a test field Make one selection n 1, option 2, option 3, NEW

French Ceci est un champ test Faites une sélection option 1, option 2, option 3

Role: Mentor and Mentee Mandatory Field ☐ Appear in Search

⚠ 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.

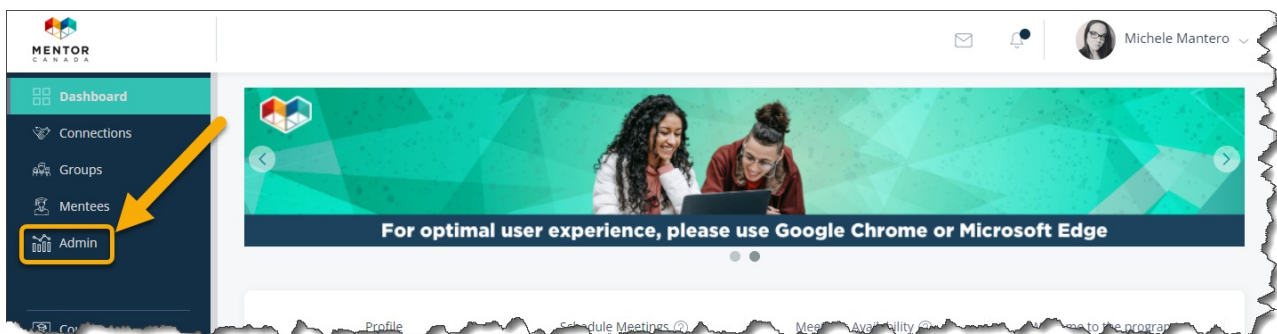
Step 3 - Define your Fields Drop-Down Menus

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.

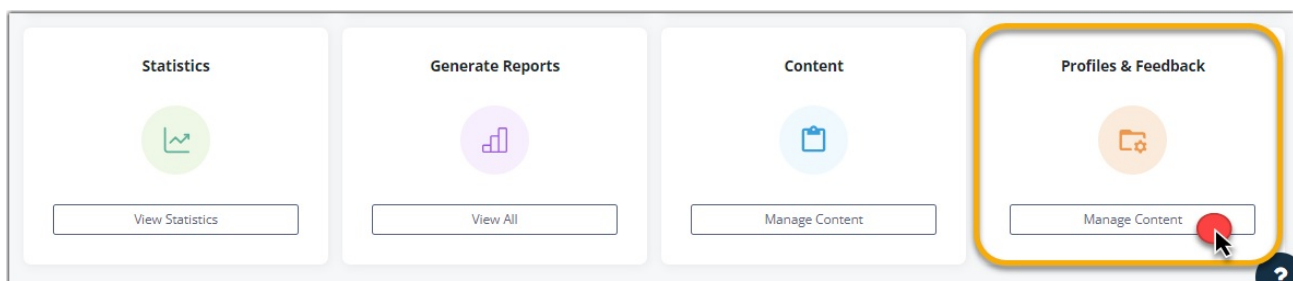
Here is the list of built-in fields which allows program administrator to modify provided options:

- Specialized Skills / Development Area (Basic section)
- Industries (Employment section)
- Functions (Employment section)
- Competencies (Competencies section)

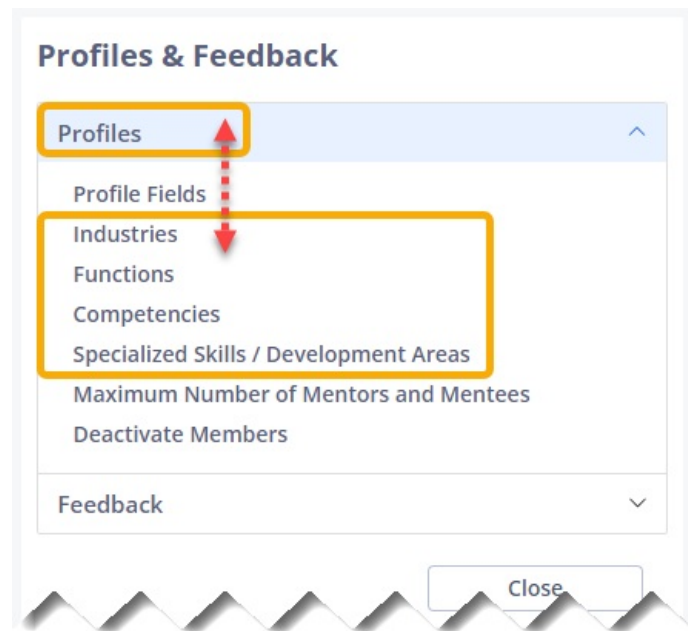
3.0 Click the "Admin" tab on the left-hand side of the platform.



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.

A screenshot of a web application page titled "Manage Industries". Below the title is a message: "You must have one or more Industry for the system to work properly." The page contains two columns of input fields for "English" and "Français". Each field has a corresponding "Delete" button to its right. A yellow arrow points to the "Delete" button for the "Textiles" entry in the "Français" column.

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

A screenshot of a web application page titled "Manage Industries". It shows a list of industries with their English and French translations. At the bottom, there is a green button labeled "+ Add another industry" and a blue button labeled "Update Industries". A yellow arrow points to the "+ Add another industry" button.

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

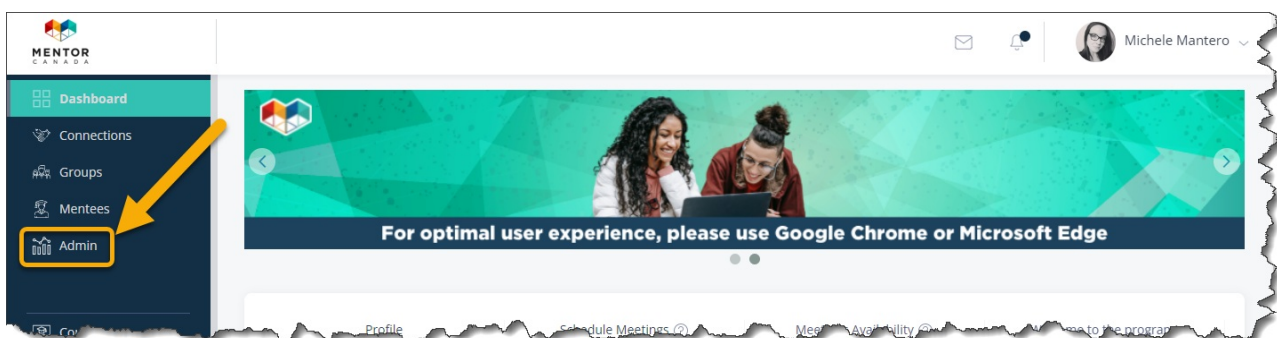
Medical Devices	Dispositifs médicaux	Delete
Facilities Services	Services d'installation	Delete
Philanthropy	Philanthropie	Delete
Nonprofit Organization Management	Gestion d'une organisation sans but non lucratif	Delete
+ Add another industry		
Update Industries		

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.

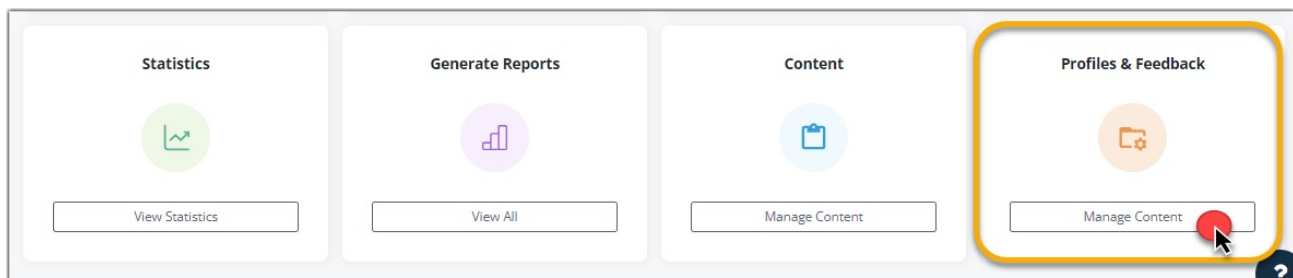
Step 4 - Create or Update the Competencies (self-evaluation)

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.

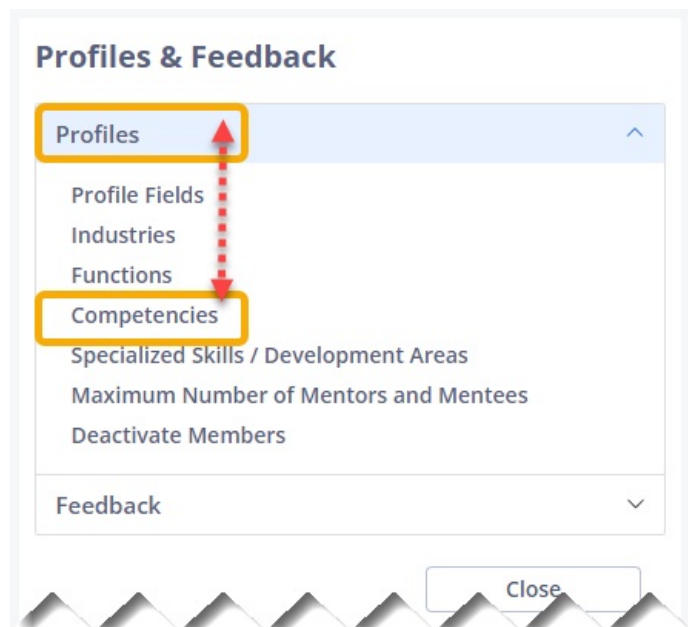
4.0 Click the “Admin” tab on the left-hand side of the platform.



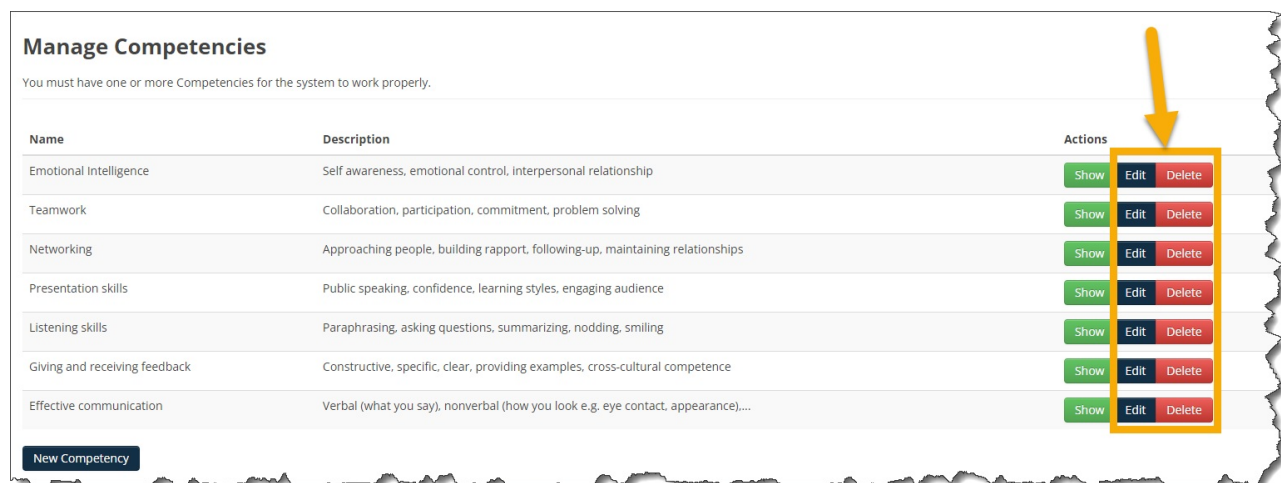
4.1 From the administrator dashboard, navigate to the "Profiles & Feedback" tile located on the third row, and click on "Manage Content" to access the corresponding section.



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](#).

Edit Competency

* Name (English)

* Nom (Français)

* Description (English)

* Description (Français)

[Save](#) [Cancel](#)

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

New Competency

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

New Competency

* Name (English)

* Nom (Français)

* Description (English)

* Description (Français)

Save

Cancel



If you have questions or need further support, please contact our Support

Team: support@mentoringcanada.ca

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