

# Customize the Mentor & Mentee Dashboard

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## Introduction to the Mentor & Mentee Dashboard

This article will introduce you to the key features and customization options available within the dashboard, allowing program administrators to optimize the mentoring experience for their program members.

### 1. Streamlined Access and Functionality:

The mentor & mentee dashboard serves as a convenient gateway to various platform functionalities. It offers mentors and mentees shortcuts to essential features, saving time and effort. From updating profiles to accessing resources and initiating communication, the dashboard streamlines operations for a seamless mentoring experience.

### 2. Program Announcements and Communication:

Program administrators have the ability to share important updates and announcements directly on the mentor & mentee dashboard. This feature ensures participants stay informed and engaged. Whether it's upcoming events, valuable resources, or program milestones, the dashboard fosters effective communication and community-building.

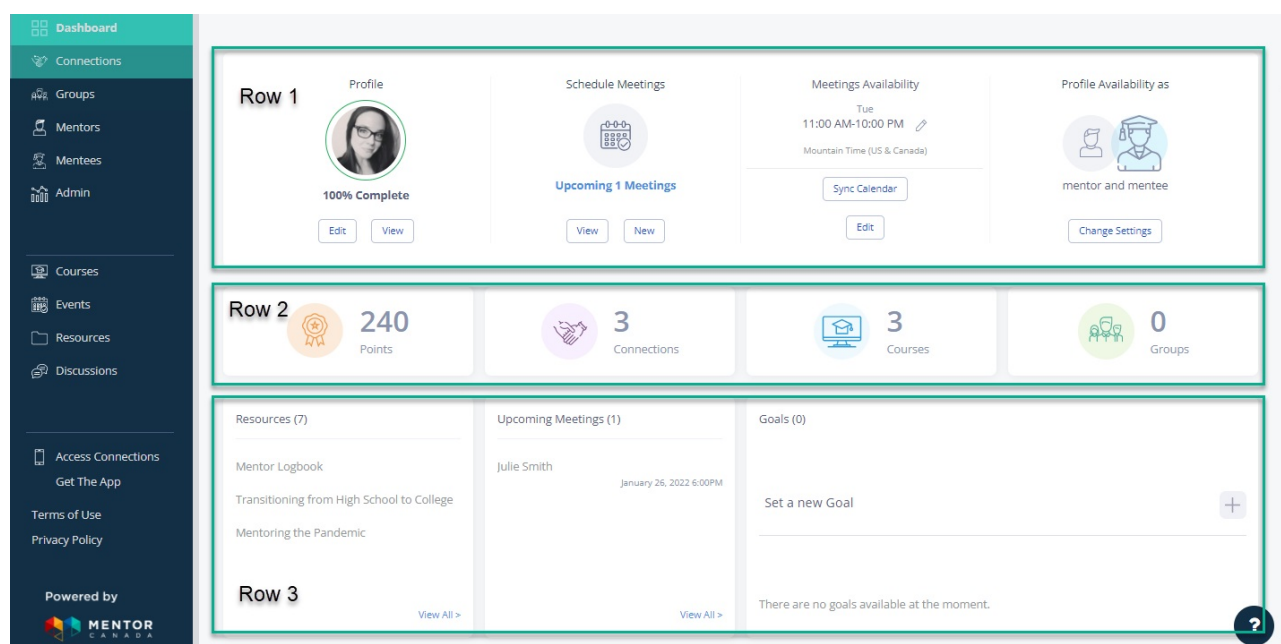
### 3. Customization for Program-specific Needs:

The mentor & mentee dashboard is fully customizable, empowering program administrators to tailor its layout and widgets to match their program's unique requirements.

### 4. Simplified Widget Functionality:

The dashboard is organized into three rows of widgets, providing concise functionality shortcuts. Widgets may include quick access to resources, events, scheduling meetings, progress tracking, and more. This simplified interface enables mentors and mentees to navigate the platform effortlessly.

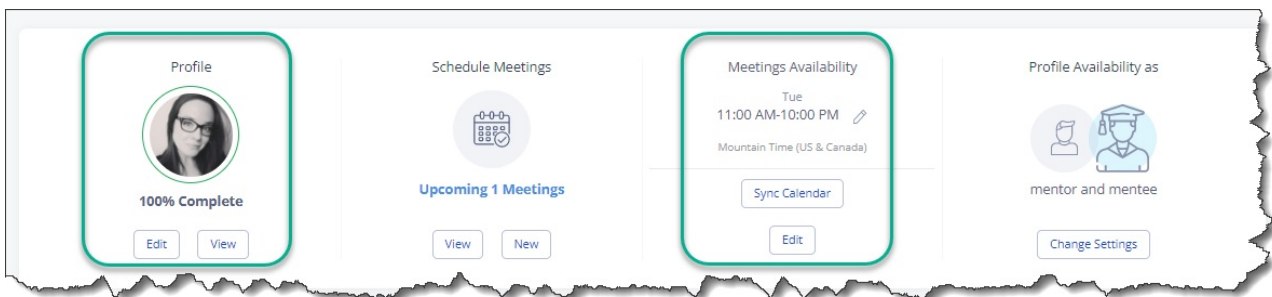
⚠ Please note that it is not possible to interchange widgets between row numbers. However, it is possible to interchange widget positions within the same row.



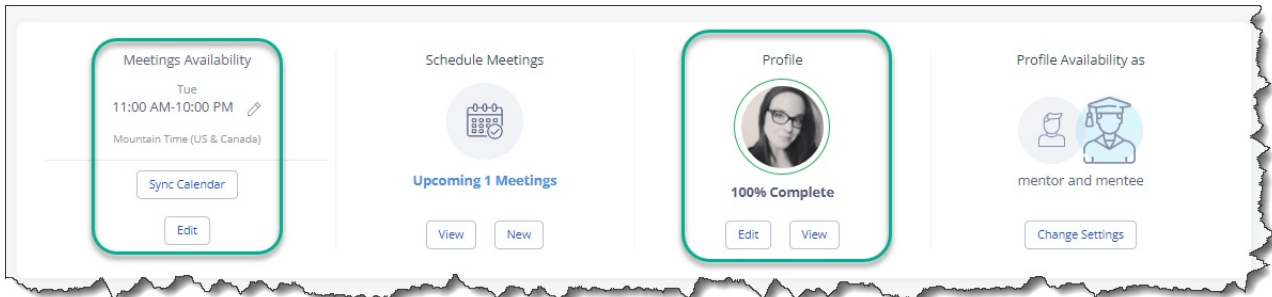
## Examples

For instance, you can change the "Profile" widget with the "Meeting availability" widget in row 1.

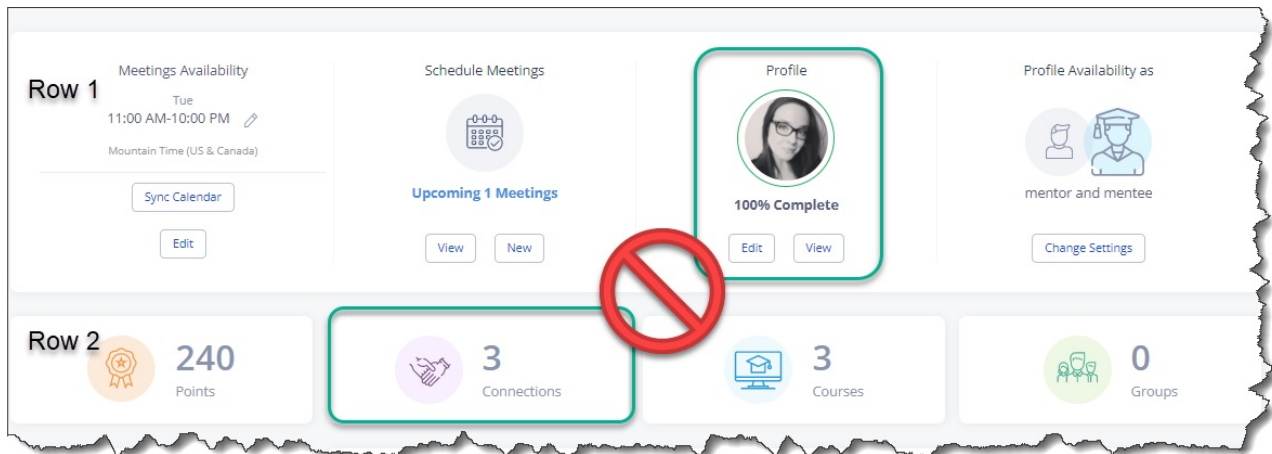
### Before



## After



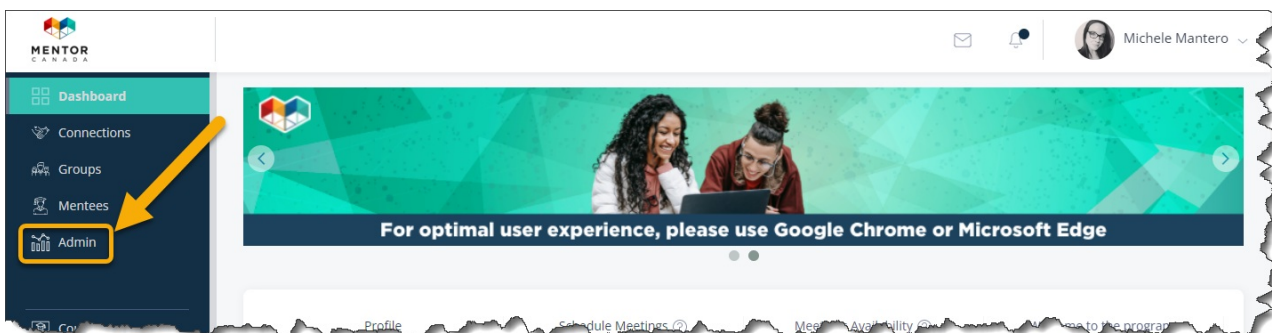
However, you would not be able to change the "Profile" widget with the "Connections" widget because they are located in different rows.



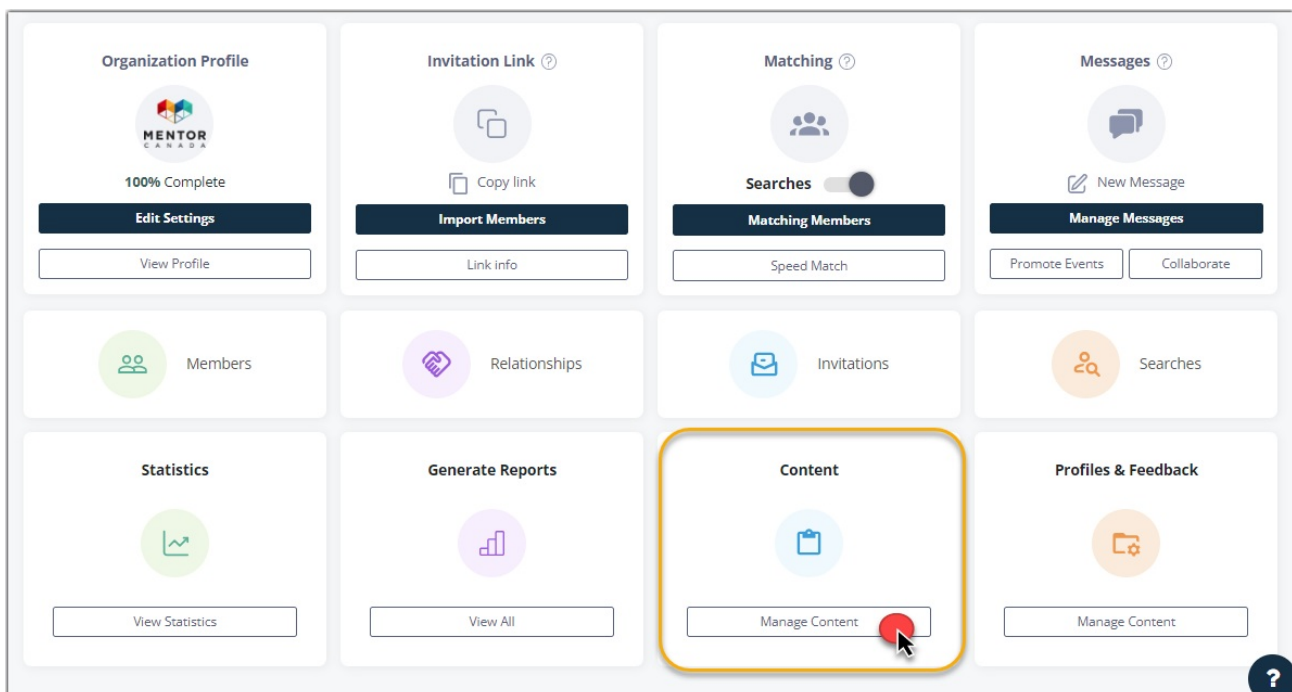
## 1 - Steps to Customize the Dashboard:

To customize the dashboard, follow these steps:

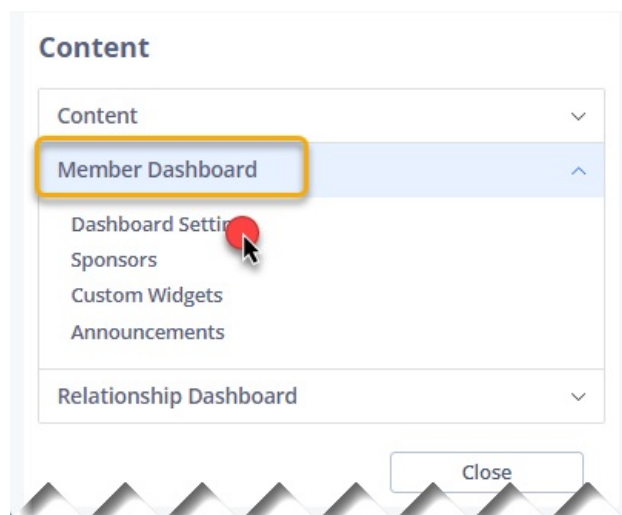
**1.0** Access the administrator dashboard by clicking the "Admin" tab on the left-hand side of the page.



**1.1** From the administrator dashboard, navigate to the "Content" 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 "Member Dashboard" and subsequently choose "Dashboard Settings."



**1.2** The following page will appear. For each row, select the position of the widgets.

### Dashboard Settings

Row number			
Dashboard Row 1			
Row1 widget 1 Availability	Row1 widget 2 Schedule Meetings	Row1 widget 3 Profile	Row1 widget 4 Role
Dashboard Row 2			
Row2 widget 1 Award Points	Row2 widget 2 Connections	Row2 widget 3 Courses	Row2 widget 4 Groups
Dashboard Row 3			
Row3 widget 1 Resources	Row3 widget 2 Upcoming Meetings	Row3 widget 3 Goals	Row3 widget 4 Goals

Save Settings

**1.2.1** Simply click the widget box to expand the options and click the desired options for each widget number.

## Dashboard Settings

The screenshot shows the 'Dashboard Settings' page with three rows of widgets. A dropdown menu is open for 'Row1 widget 1', showing options: Availability (selected), Profile, Schedule Meetings, Availability, Role, Sponsor, and Mentoring Hours. The 'Save Settings' button is at the bottom left.

Dashboard Row 1			
Row1 widget 1 Availability	Row1 widget 2 Schedule Meetings	Row1 widget 3 Profile	Row1 widget 4 Role
Dashboard Row 2			
Row2 widget 1 Availability	Row2 widget 2 Connections	Row2 widget 3 Courses	Row2 widget 4 Groups
Dashboard Row 3			
Row3 widget 1 Upcoming Meetings	Row3 widget 2 Goals	Row3 widget 3 Goals	Row3 widget 4 Goals

Save Settings

**1.3** Click **Save Settings** to save your changes. This can be updated at any time.

## Dashboard Settings

The screenshot shows the 'Dashboard Settings' page with three rows of widgets. The 'Save Settings' button is highlighted with a yellow box and an arrow pointing to it. The widgets are: Row1 (Availability, Schedule Meetings, Profile, Role), Row2 (Award Points, Connections, Courses, Groups), and Row3 (Resources, Upcoming Meetings, Goals, Goals).

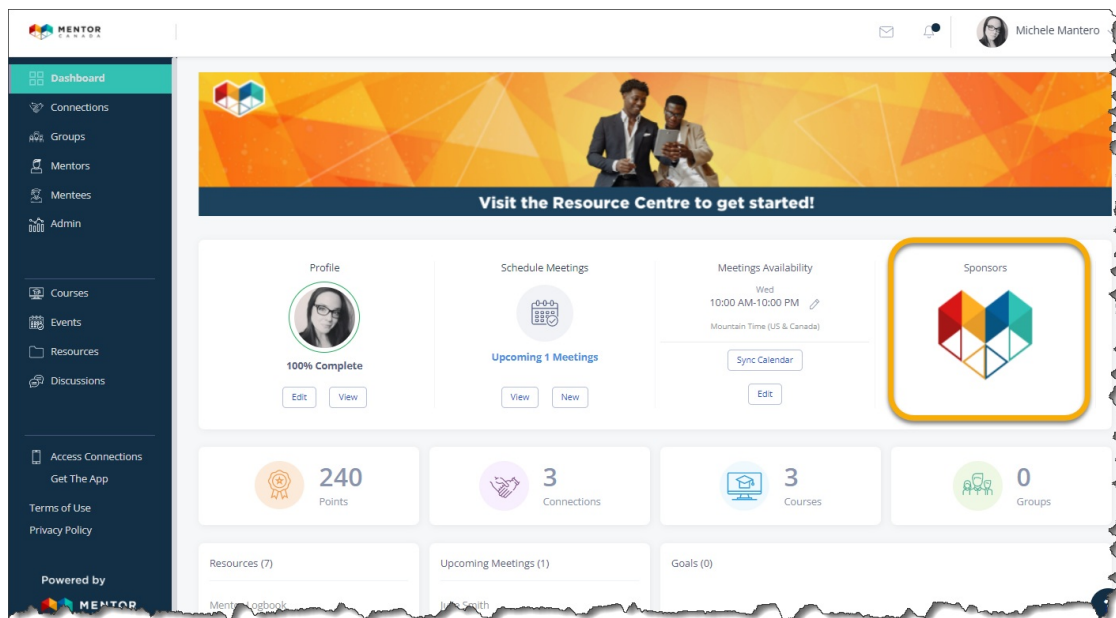
Dashboard Row 1			
Row1 widget 1 Availability	Row1 widget 2 Schedule Meetings	Row1 widget 3 Profile	Row1 widget 4 Role
Dashboard Row 2			
Row2 widget 1 Award Points	Row2 widget 2 Connections	Row2 widget 3 Courses	Row2 widget 4 Groups
Dashboard Row 3			
Row3 widget 1 Resources	Row3 widget 2 Upcoming Meetings	Row3 widget 3 Goals	Row3 widget 4 Goals

Save Settings

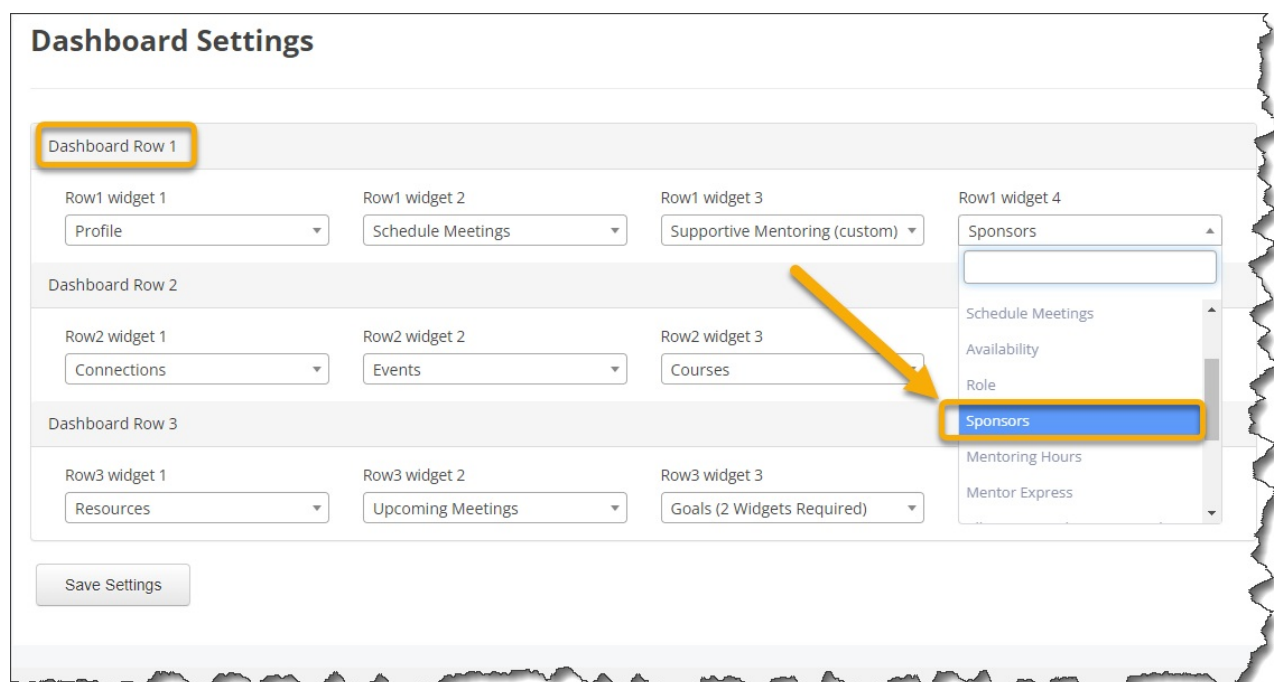
⚠ Please note that Goals are automatically taking 2 widget spaces. Therefore, if you had Goals to Row 3, you can only have 3 widgets displayed.

## Add a Sponsor to the Dashboard

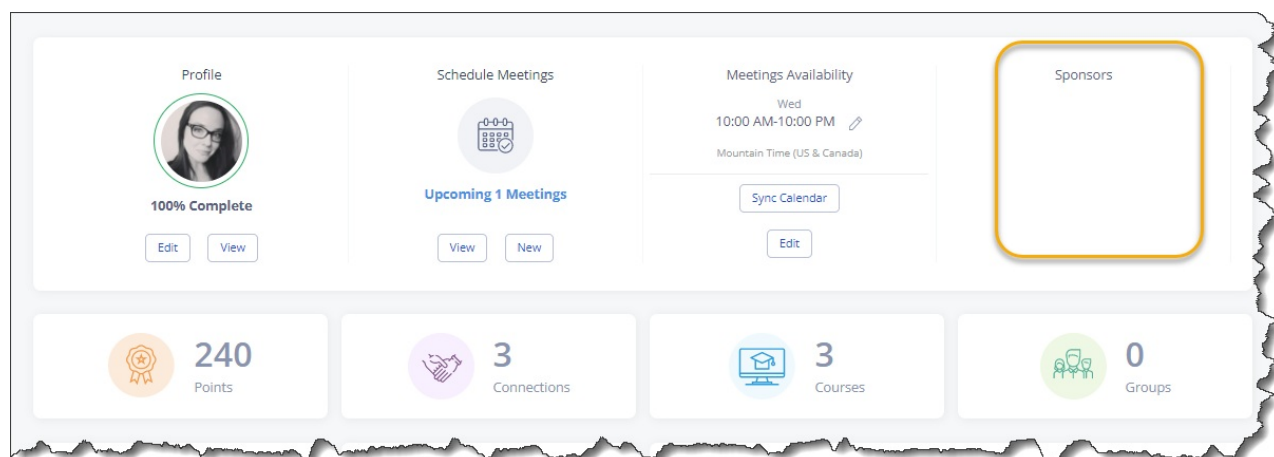
The dashboard also allows program administrators to showcase their program sponsors and a logo hyperlink taking the user to the sponsor's website.



The sponsor widget is only available to display on row 1 of the dashboard.



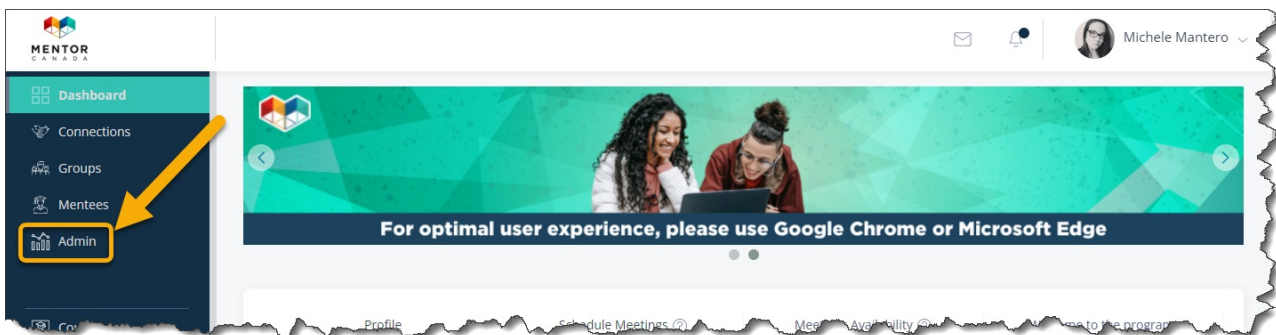
Before a sponsor can be added to the dashboard, it has to be created on the virtual mentoring platform. If the sponsor is not created first, the dashboard will display a blank widget.



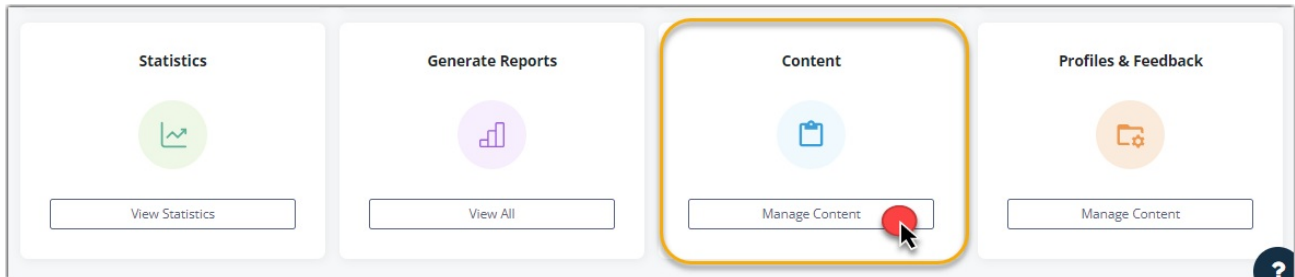
## 2 - Steps to add sponsor(s) to the dashboard:

**2.0** Access the administrator dashboard by clicking the "Admin" tab on the left-hand side of the page.

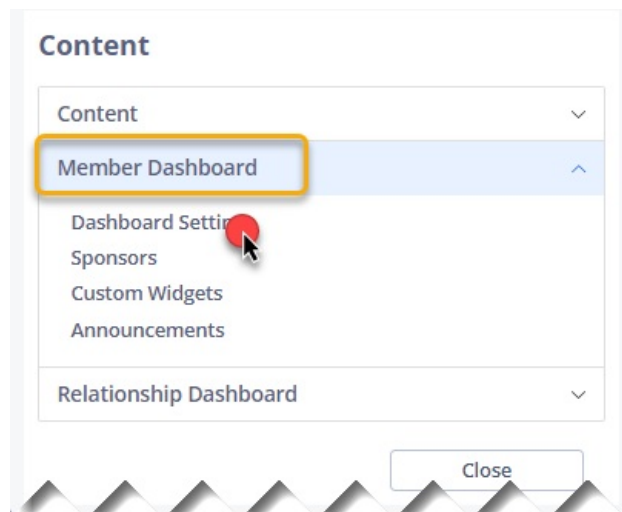




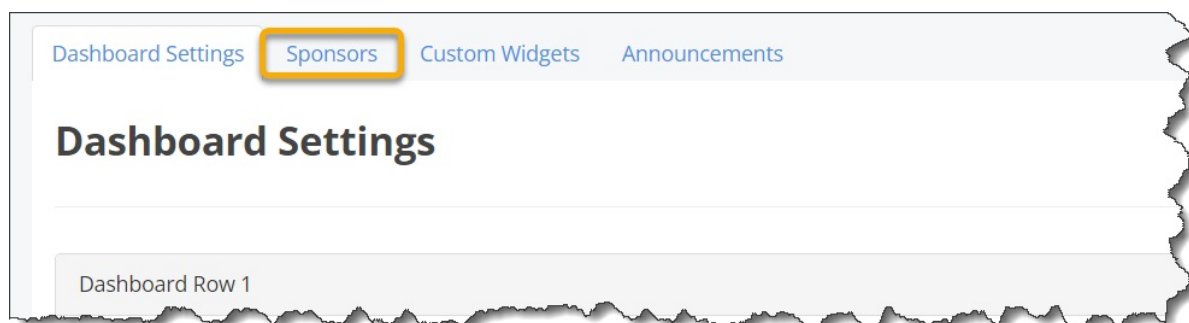
**2.1** From the administrator dashboard, navigate to the "Content" tile located on the third row, and click on "Manage Content" to access the corresponding section.



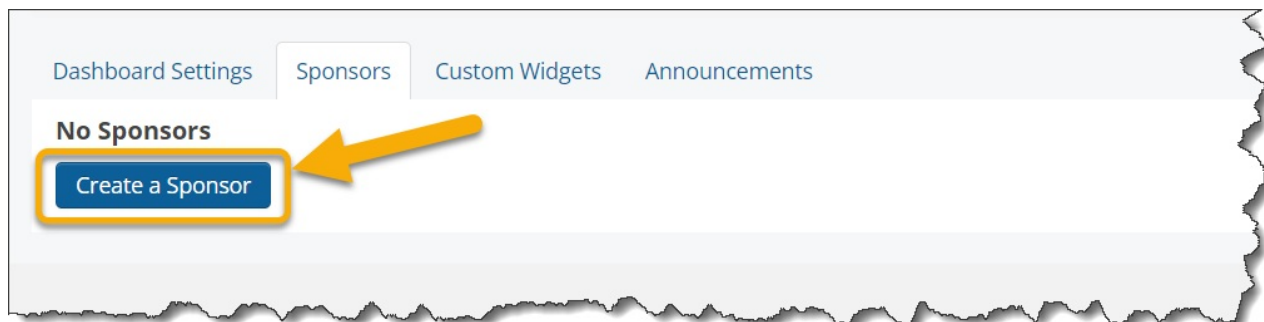
**2.1.1** A new dialog box will appear. Expand the selections by clicking on "Member Dashboard" and subsequently choose "Dashboard Settings."



**2.2** Click the "Sponsors" tab.



**2.3** Click [Create A Sponsor](#)



**2.4** Add the sponsor name in the "Name" field

**2.5** Add a Url (website) in the "URL" field linking the logo to the sponsor's website

**2.6** Click **Choose File** to upload the sponsor's logo

**2.6.1** You can repeat these steps in the french fields if your program is bilingual.

**2.7** Click **Save Sponsor**

Name: Test Sponsors

URL: https://mentoringcanada.ca/

Attachment: Choose File

Upload an image with the following dimensions for better results:  
Width: 250 pixels / Height: 250 pixels Advanced\_(1).png

Save Sponsor

French Name: Commanditaire test

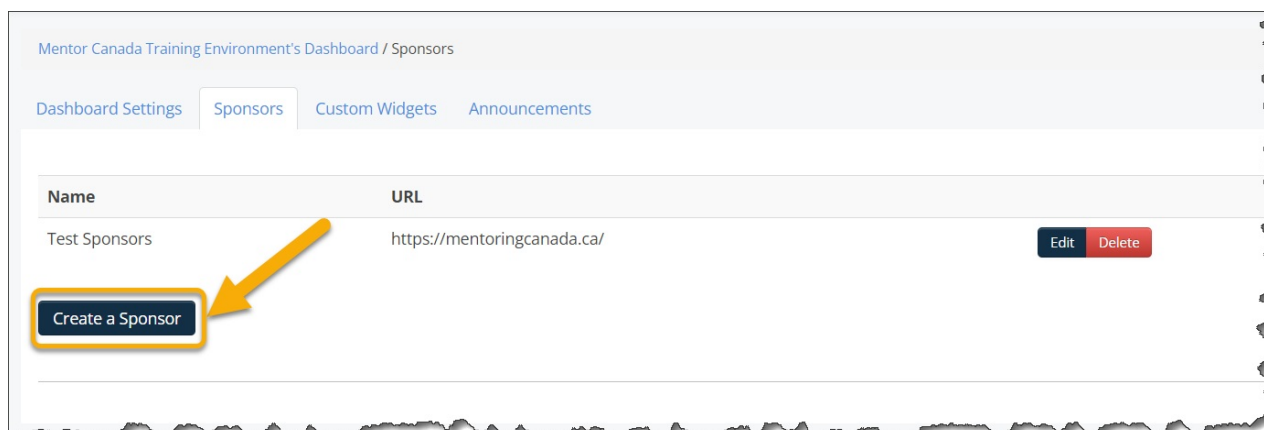
French URL: https://mentoringcanada.ca/fr

Attachment French: Choose File

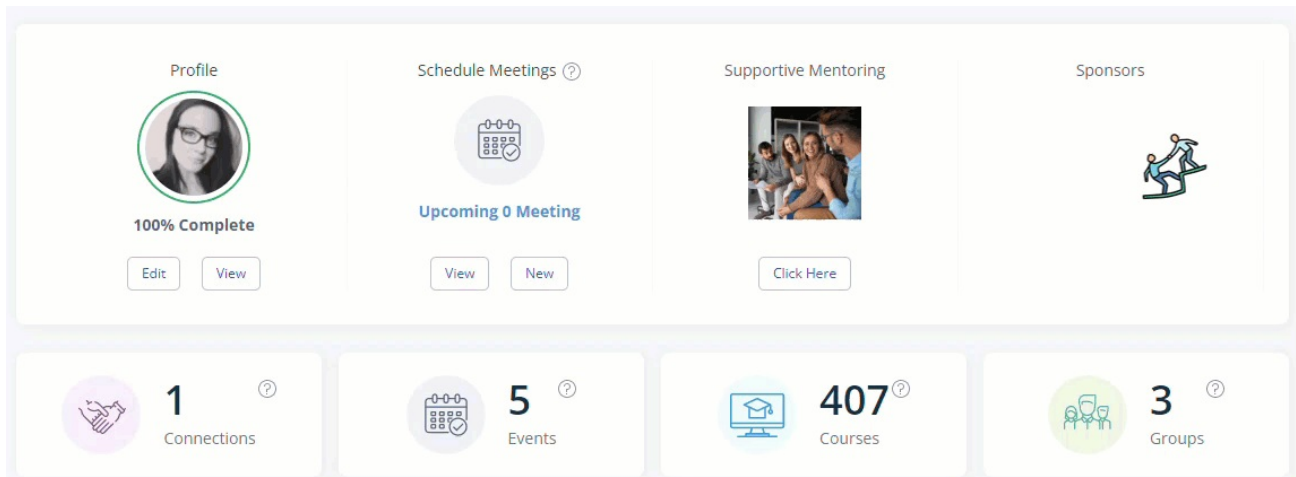
Upload an image with the following dimensions for better results:  
Width: 250 pixels / Height: 250 pixels Advanced\_(1).png

It is possible to create multiple sponsors (figure 1) using only one widget from row 1 of the dashboard. If you have two sponsors on the dashboard, the different sponsors will move as a carousel (figure 2).

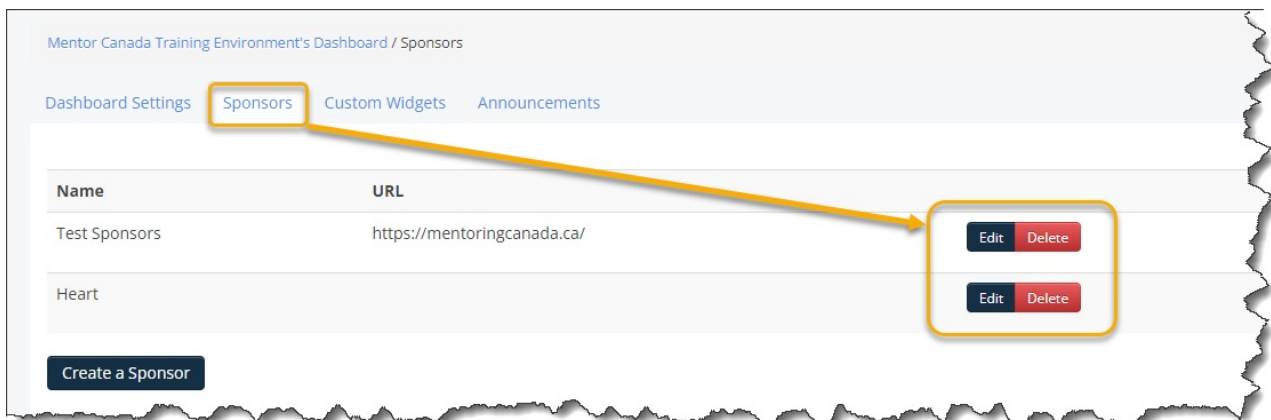
**Figure 1**



**Figure 2**



**2.8** Once the sponsor (s) are created, it appears under the "Sponsors" tab and can be Edited or Deleted anytime.



**2.9** The next step is to add the recently created sponsor(s) to the dashboard widget. Follow **steps 1.0 to 1.3** of the above section.

## Schedule a Meeting from the Dashboard

It is possible to schedule meetings directly from the dashboard as long as an administrator includes the "Schedule Meetings" widget on the members dashboard. The calendaring feature on the dashboard allow mentors and mentees to only see common availability.



### Schedule Meeting

Duration

30 minutes

mentor/mentee

Julie Smith

Location

<https://ourmentorcityqa.mentorcity.com/en/organizations/724/groups/28018/call/?type=Relationship>
Copy

Date

January 2022

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Time Slot

6 Morning Slots

12 Afternoon Slots

12:00PM

12:30PM

1:00PM

1:30PM

2:00PM

2:30PM

3:00PM

3:30PM

4:00PM

4:30PM

5:00PM

5:30PM

4 Evening Slots

Cancel

Send Request

The dashboard also display upcoming meetings if you include this option as a dashboard widget for your program members.

Profile

75% Complete

Edit
View

Schedule Meetings

Upcoming 1 Meeting

View
New

Meetings Availability

Mon
06:00 PM-08:00 PM
Eastern Time (US & Canada)

Sync Calendar
Edit

Sponsors

Connections
2

Events
1

Resources (6)

Mentor Logbook
Transitioning from High School to ...
Resource Guide for Young Leaders

Upcoming Meetings (1)

Yetunde Test
December 10, 2022 11:00AM

### Scheduled Meetings

Upcoming Meetings
Past Meetings

Date & Time
December 10, 2022 11:00AM

Mentor/Mentee
Yetunde Test (Mentee)

Location

<https://ementor.mentoringcanada.ca/fr/organizations/724/groups/29341/call/?type=Conversation>

Add to Calendar
Add Meeting Notes
Cancel Meeting
Reschedule

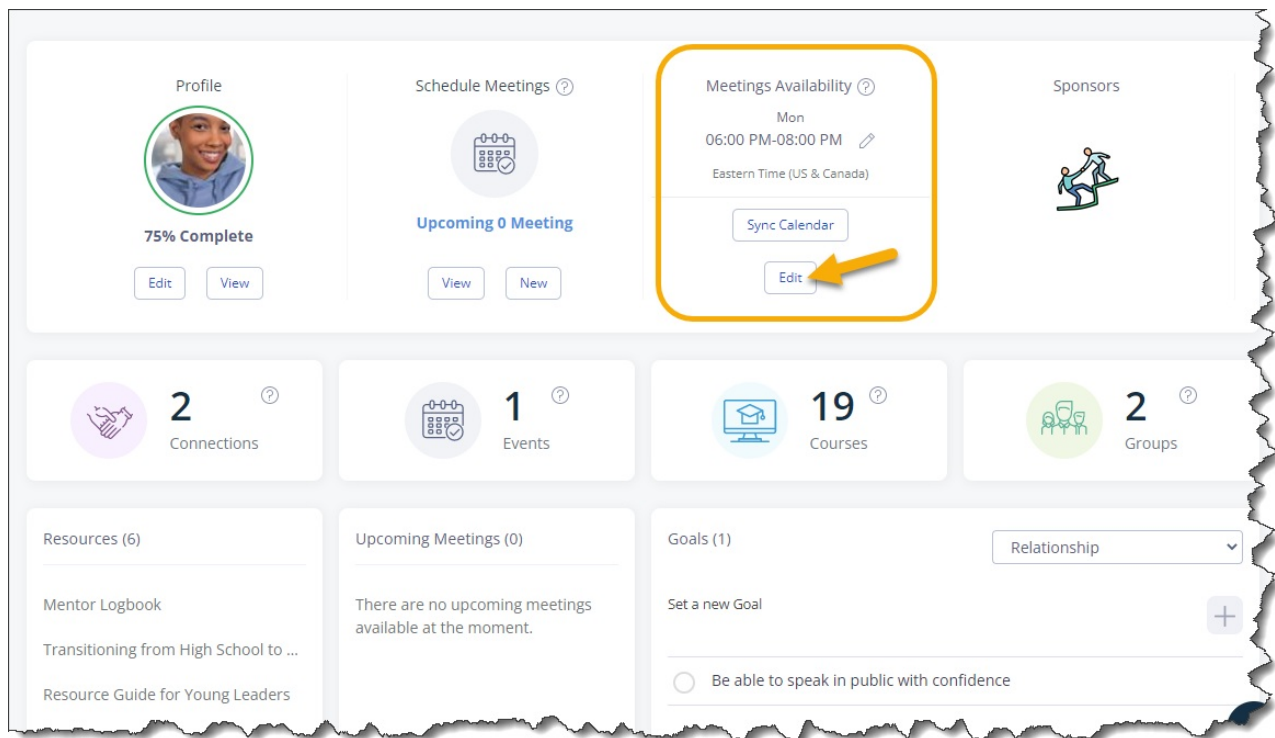
Go To Dashboard

This window comes up when clicking on Upcoming Meetings.

### 3 - Steps to schedule a meeting from the dashboard:

**3.0** Each program member must first setup their availability in the virtual mentoring platform before scheduling a meeting. For quick setup, you need to provide mentors and mentees with the "Meetings Availability" widget on the dashboard. If you do not include this widget, your mentors/mentees will still be able to enter their availability from the "Connections" tab.

**3.1** Next, they will need to click **Edit** or the pen icon from the "Meetings Availability" widget on the dashboard.



**3.1.1** The mentor/mentee enters their availability for each day of the week or click **Sync Calendar**.

The dialog box is titled 'Select the days and times that you are typically available for mentoring meetings.' It shows 'Your timezone is set to (GMT-07:00) Mountain Time (US & Canada)' and a 'Sync Calendar' button. Below is a table for selecting available times:

Day	From	To	Available
Sunday	12:00 AM	11:59 PM	<input checked="" type="checkbox"/>
Monday	10:00 AM	08:00 PM	<input type="checkbox"/>
Tuesday	11:00 AM	10:00 PM	<input type="checkbox"/>
Wednesday	10:00 AM	10:00 PM	<input type="checkbox"/>
Thursday	12:00 PM	09:00 PM	<input type="checkbox"/>
Friday	8:00 AM	08:00 PM	<input type="checkbox"/>
Saturday	7:00 AM	09:00 PM	<input type="checkbox"/>

At the bottom are 'Cancel' and 'Save' buttons.

**3.1.2** They will then click **Save**

< Back

Select the days and times that you are typically available for mentoring meetings.

Your timezone is set to (GMT-07:00) Mountain Time (US & Canada) [Sync Calendar](#)


Available times Unavailable

Sunday	From	12:00 AM	To	11:59 PM	<input checked="" type="checkbox"/>
Monday	From	10:00 AM	To	08:00 PM	<input type="checkbox"/>
Tuesday	From	11:00 AM	To	10:00 PM	<input type="checkbox"/>
Wednesday	From	10:00 AM	To	10:00 PM	<input type="checkbox"/>
Thursday	From	12:00 PM	To	09:00 PM	<input type="checkbox"/>
Friday	From	8:00 AM	To	08:00 PM	<input type="checkbox"/>
Saturday	From	7:00 AM	To	09:00 PM	<input type="checkbox"/>

Cancel **Save**

**3.2** Now that their availability is set up, they can click **New** from the "Schedule Meetings" widget.


Profile



75% Complete

[Edit](#) [View](#)

Schedule Meetings ?



Upcoming 0 Meeting

[View](#) **New**

Meetings Availability ?


Mon  
06:00 PM-08:00 PM [Edit](#)

Eastern Time (US & Canada)

[Sync Calendar](#)

[Edit](#)

Sponsors



**3.2.1** Select a duration

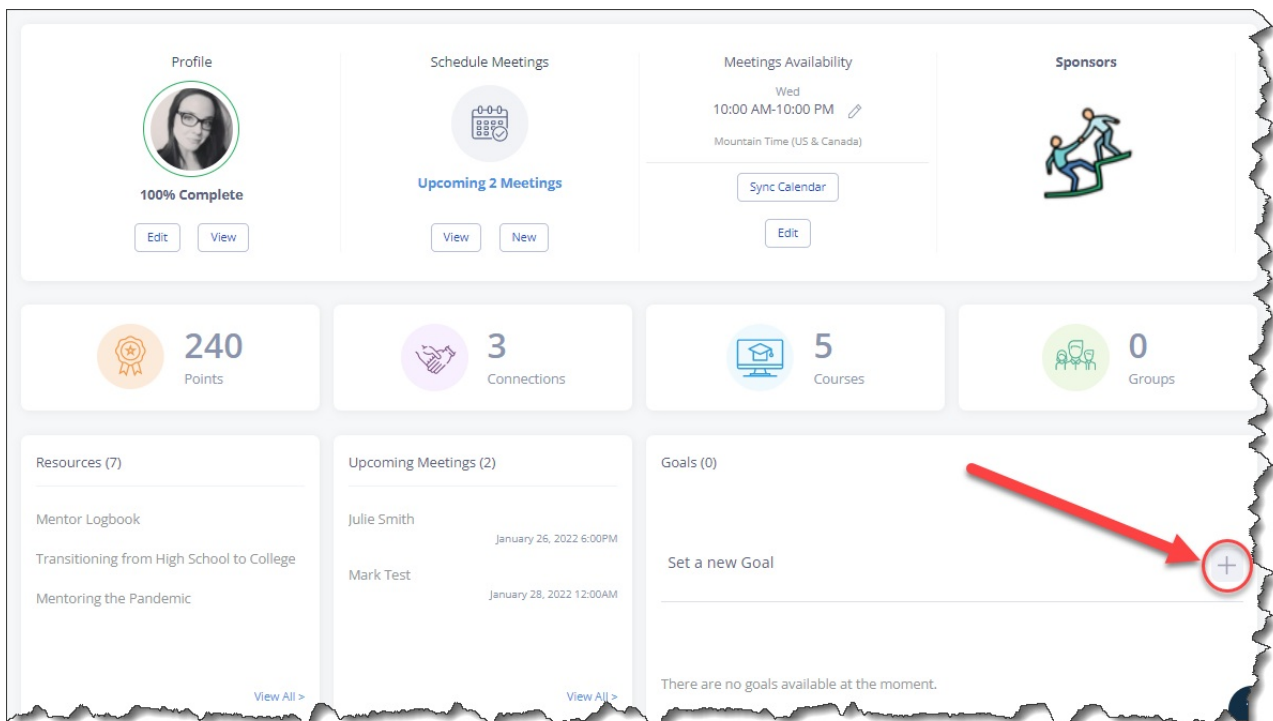
**3.2.2** Select the mentor or mentee they want to meet with

**3.2.3** Click the desired meeting date on the calendar

**3.2.4** Select a time slot from the morning, afternoon or evening slots by clicking on the desired time.

**3.2.5** Click **Send Request**





**4.1** Chose for whom this goal is intended. Chose either "Personal" if this goal is for the person currently entering the goal or select the name of a mentor or mentee if this goal is meant for the mentorship.

**4.2** Enter a description of the goal.

**4.3** Select a due date to achieve this goal.

**4.4** Optional: enter a sub-goal related to the current goal and click **Add Subgoal** to keep on adding other sub-goals.

**4.5** Select a due date for the sub-goal

**4.6** Select a priority

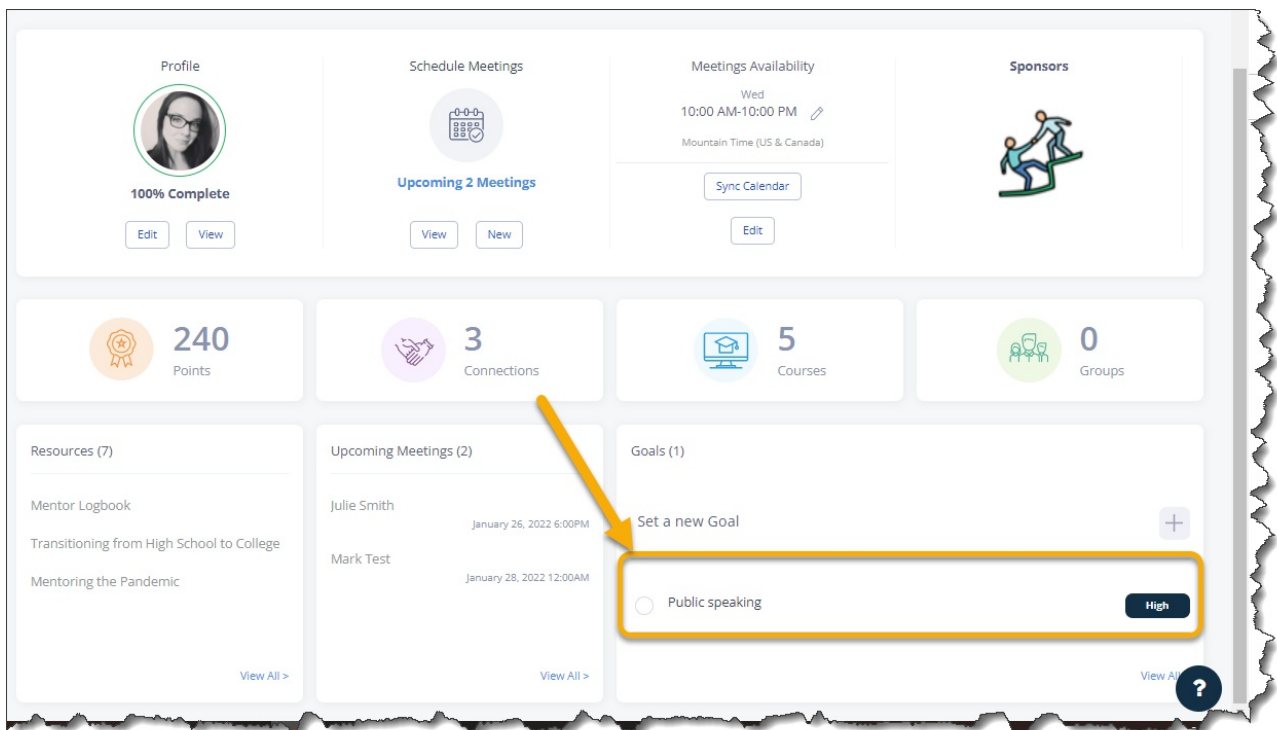
**4.7** Click **Save**

The 'Goals' form is shown with the following fields and values:

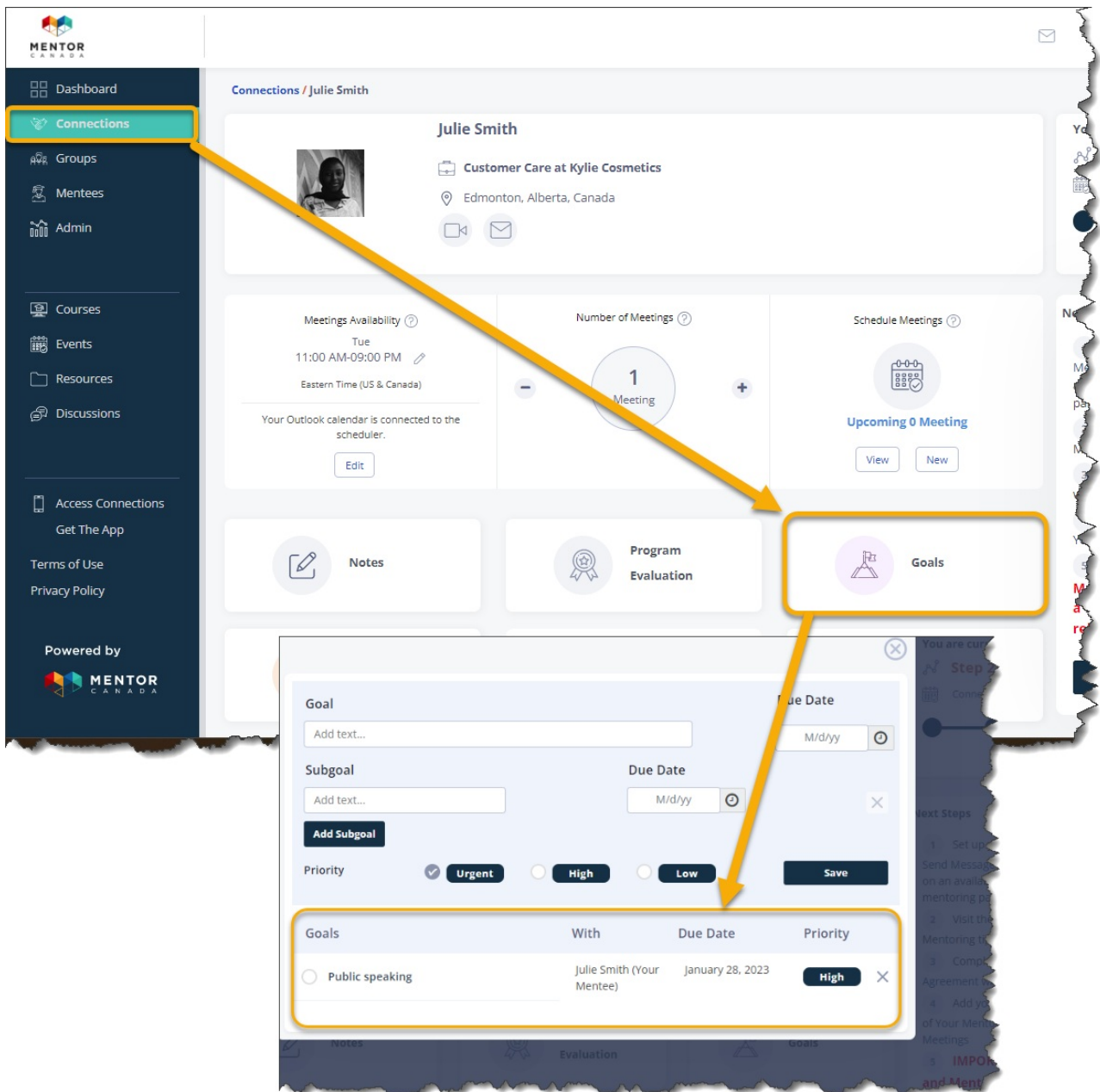
- Relationship 4.1:** Personal (dropdown menu is open showing options: Personal, Joey Test, Julie Smith, Annet Thomas)
- Goal 4.2:** Public speaking
- Due Date 4.3:** 2022-02-25
- Subgoal 4.4:** Give a presentation to group A
- Due Date 4.5:** 2022-02-18
- Priority 4.6:** High (selected)
- 4.7:** Save

**4.8** The goal is now displayed on the dashboard.





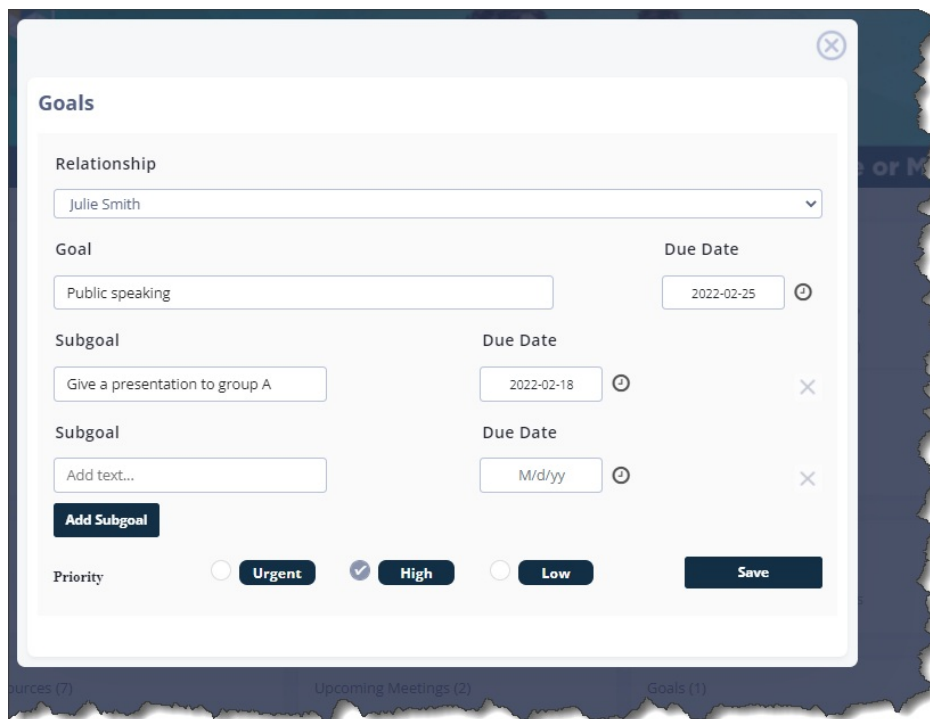
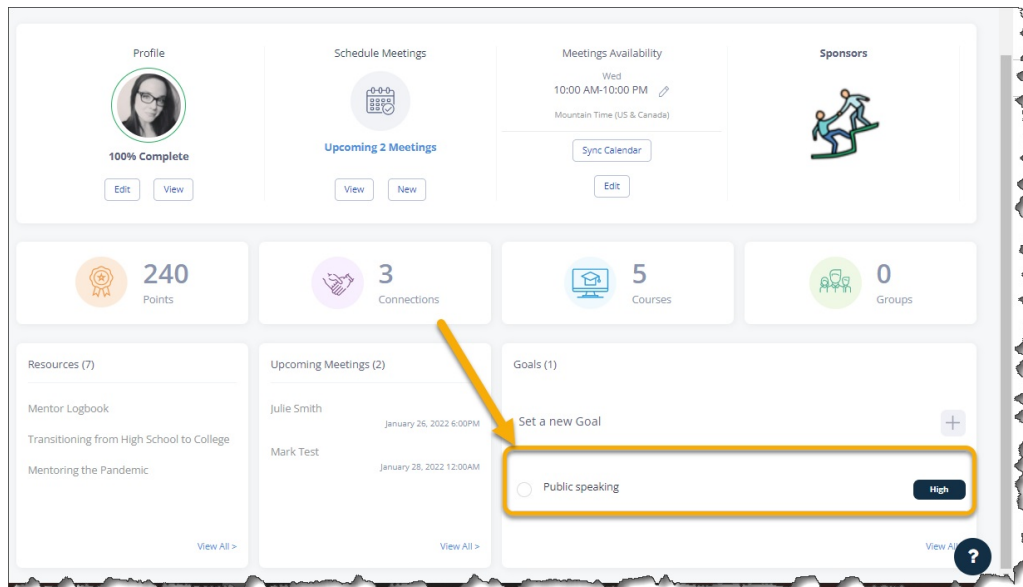
**4.8.1** If the goal is for the mentorship, it will also be visible when clicking on your connection.





## 5- Steps to Edit or Delete an Existing Goal

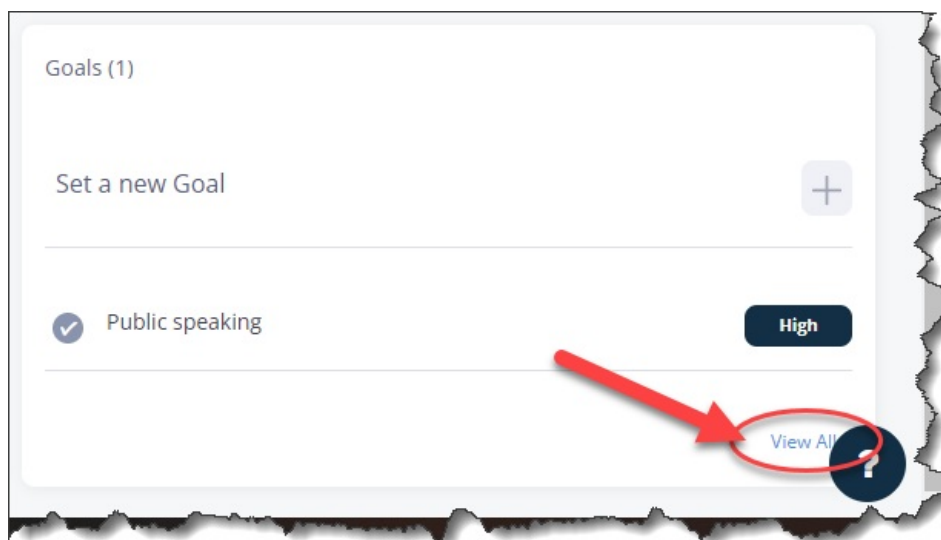
**5.0** Click on the goal to update it at anytime and click **Save** after editing the goal.



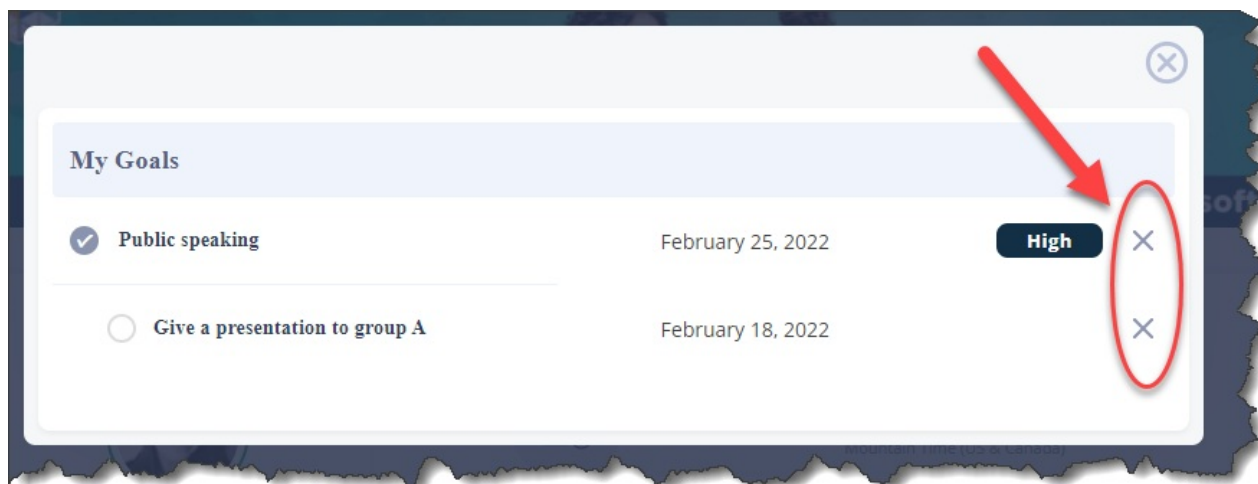
**5.1** To mark a goal as achieved, simply check the circle next to the goal description until you see a checkmark.



**5.2** If you entered a goal in error and need to delete it, from the dashboard click "View All".



**5.3** Click the X sign next to the goal that needs to be deleted.



**If you have questions or need further support, please contact our Support Team: [support@mentoringcanada.ca](mailto:support@mentoringcanada.ca)**

🔄Revision #46

★Created Tue, Jan 25, 2022 11:39 PM by Michèle Mantero

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