Ending a Program Cycle

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Context

If your program operates in cycles and experiences inactive periods or the conclusion of mentoring relationships, it is crucial to understand the process of pausing the program on the virtual mentoring platform. Pausing the program effectively restricts mentors and mentees from accessing the platform during periods when program staff are unavailable to support members and monitor activities.

In this article, we will explore three distinct methods to appropriately conclude a program cycle on the virtual mentoring platform, ensuring a smooth transition and maintaining a supportive environment for all program participants.

Considerations for the Methods:

The methods presented in this article are designed to address specific considerations when ending a program cycle on the virtual mentoring platform. These considerations include:

1. The program requires a full members' refresh.
2. The program would like to retain some program members and their existing data.
3. The program would like a full members' refresh but also needs a quick re-onboarding method for returning program members.

1- Full Members' Refresh

> **Definition:** A full members' refresh refers to a process in which all current program members are permanently removed from the virtual mentoring platform. This action not only deletes the user accounts but also erases all associated data linked to their mentoring relationships and platform activities. This includes any accessed resources, completed courses and events, survey and evaluation responses, and other relevant data. By implementing a full members' refresh, the program essentially starts anew, wiping the slate clean and creating a fresh environment for the next program cycle. This approach is useful when there is a need to completely reset the platform, removing all traces of previous program participants and their corresponding data.
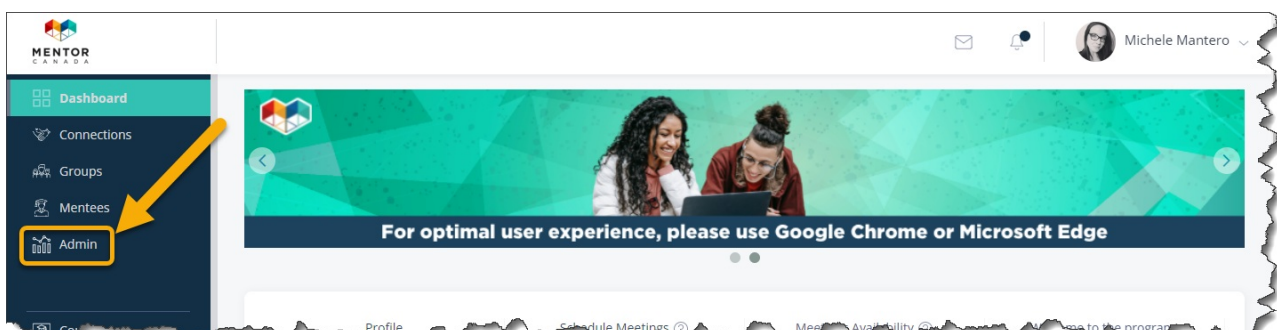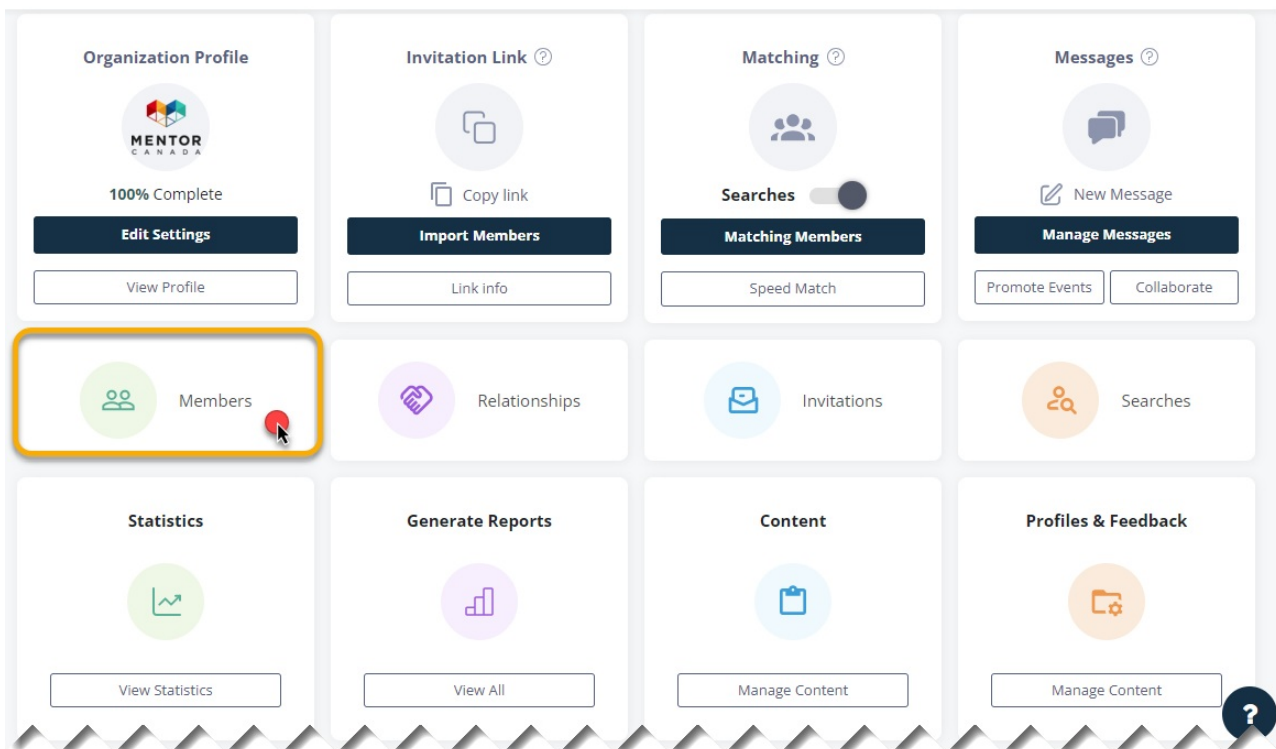
Steps:

1.0 Deactivate all users

Deactivating your program members will prevent them from accessing the virtual platform.

Small Cohort

1.1 Click the "Admin" tab on the left-hand side of the page to access the administrator dashboard.

1.2 Click on the `Members` tile located on the second row of the administrator dashboard.

**1.3** Identify the "Is Active" column positioned to the right of each member's name.

1.3.1 Uncheck the box under the "Is Active" column for each member you wish to deactivate.

| Full Name	Email	Profile Completion	Last Activity	Groups	Groups Name	Matches	Role	Mentoring Hours	Member Since	End Date	Is Active	Member Administrator
Test Mac	e.emakpore@gmail.com	27%		0	Add to Group	0	Mentor	00:00	October 5, 2022		☐	Member Administrator
Mary Smith	test27-mentor2@mentoringcanada.ca	100%	September 21, 2022 1:40PM	1	Mary's Group Add to Group	2	Mentor	00:00	August 29, 2022		☑	Member Administrator
Charlotte Test	test22-mentor2@mentoringcanada.ca	100%	September 28, 2022 2:32PM	1	Mary's Group Add to Group	1	Mentee	00:00	August 29, 2022		☑	Member Administrator
joe smith	test25-mentor@mentoringcanada.ca	100%		0	Add to Group	0	Mentor	00:00	August 5, 2022		☑	Member Administrator
Sandy Test	test25-mentee1@mentoringcanada.ca	100%	September 7, 2022 9:48AM	1	Mary's Group Add to Group	0	Mentee	00:00	August 5, 2022		☑	Member Administrator
David Smith	test25-mentor1@mentoringcanada.ca	100%	September 7, 2022 9:47AM	0	Add to Group	0	Mentor	00:00	August 5, 2022		☑	Member Administrator

> ℹ Once the "Is Active" box is unchecked, the program members will be deactivated immediately. This action prevents them from further accessing the platform, effectively restricting their connection from this point forward. There is no need to save the changes separately; the deactivation takes effect instantly upon unchecking the box.

Large Cohort

1.4 Click the "Admin" tab on the left side of the page to access the administrator dashboard.
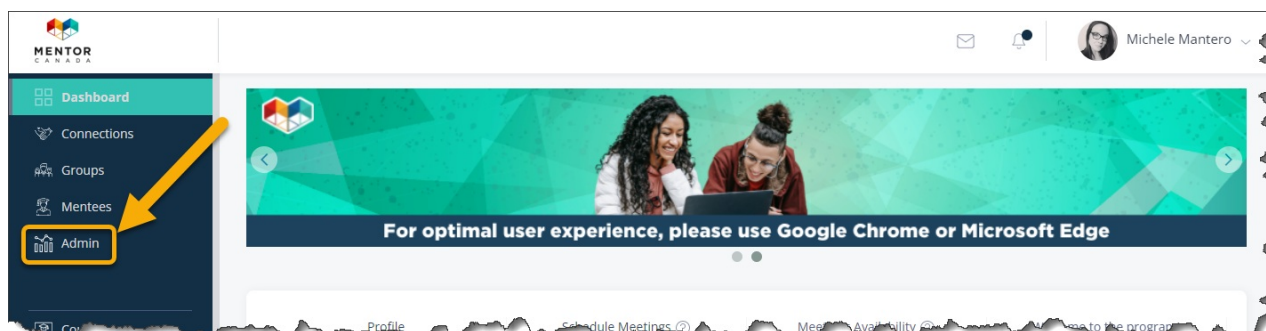

1.5 From the administrator dashboard, navigate to the "Profiles & Feedback" tile located on the third row, and click on "Manage Content" to access the corresponding section.
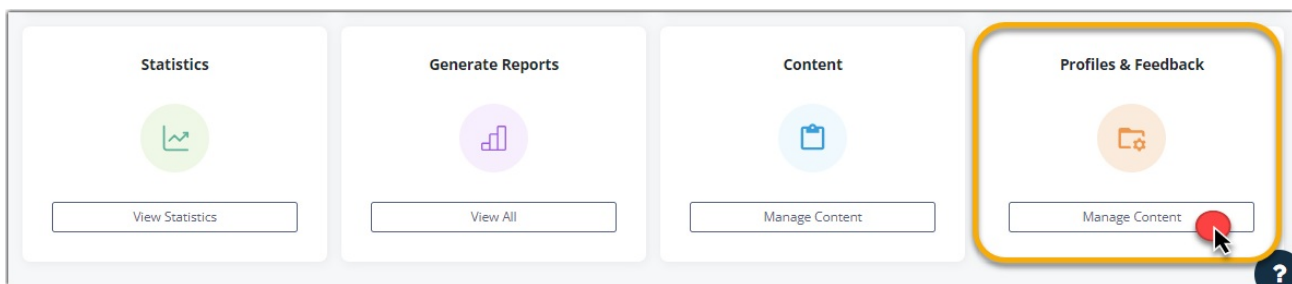
1.5.1 A new dialog box will appear. Expand the selections by clicking on "Profiles" and subsequently choose "Deactivate Members".
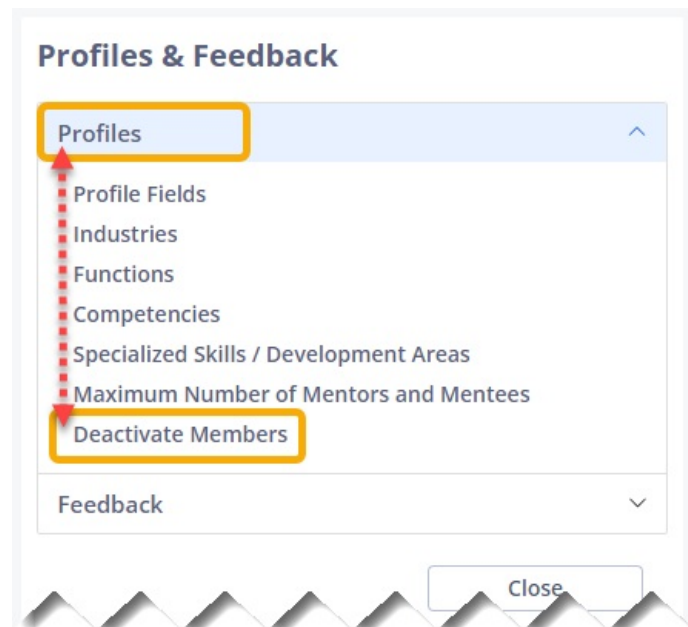
**1.6** Download the mass deactivation template by clicking `Download Sample`.
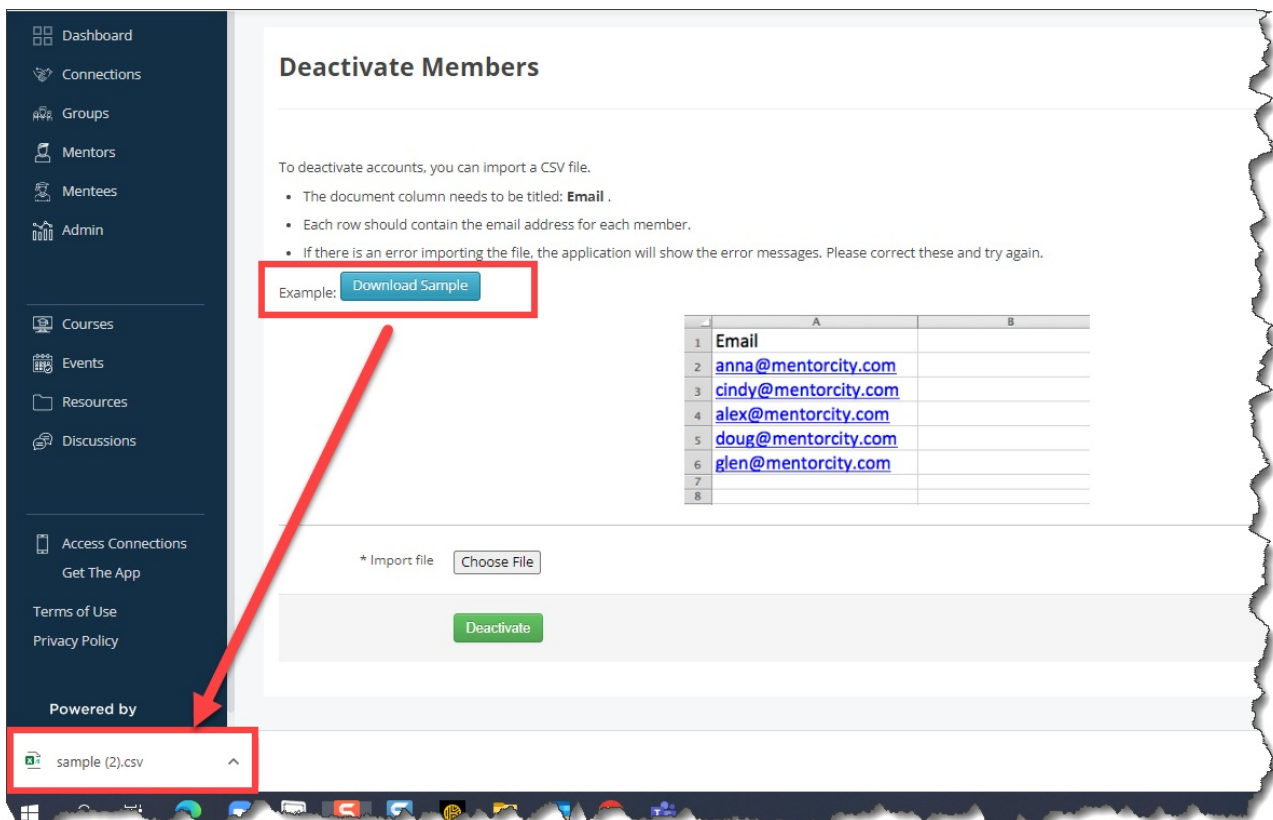
1.6.1 Open the downloaded template, and enter the email addresses of the program members you wish to deactivate. Ensure that the email addresses are entered accurately, following the format specified in the template.
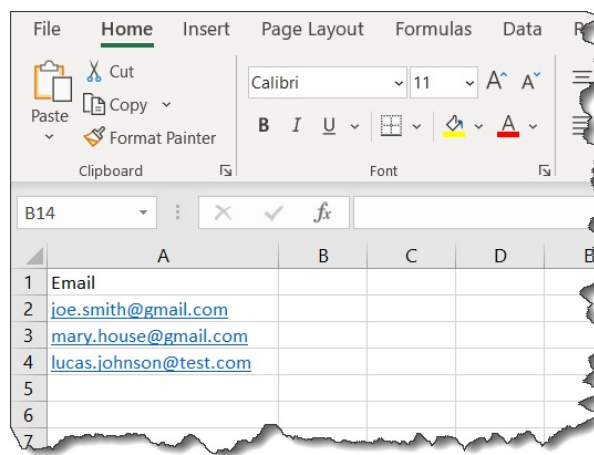
1.6.2 Save the completed template to your computer.

1.7 Click `Choose File` to browse your computer and select the completed template that you saved in the previous step.
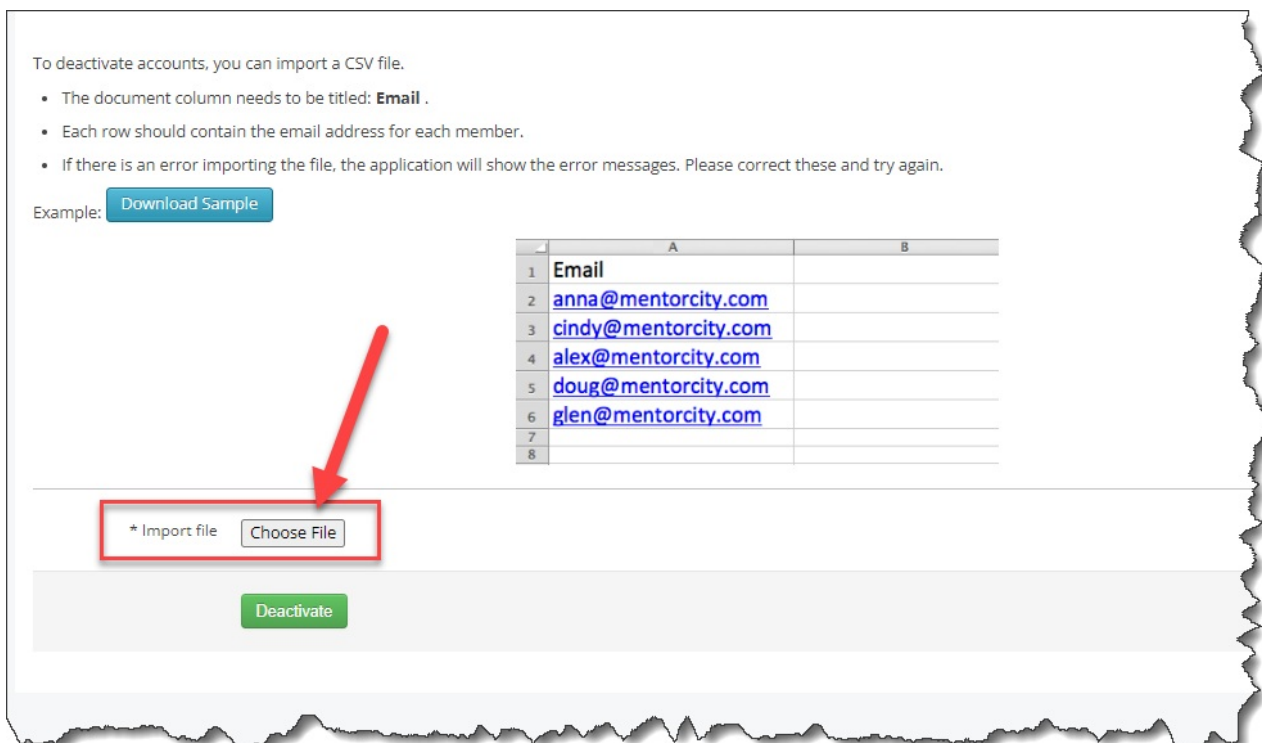
1.8 Click `Deactivate` to initiate the mass deactivation process. This action will deactivate all program members listed in the template simultaneously.

2.0 Export all Reports

To ensure a comprehensive record of the ending cycle, it is advisable to run and export all available reports. These reports contain valuable data that can be utilized for future reference and analysis.

2.1 Learn How to Generate Reports: Refer to the article Generate Reports to access detailed instructions on running reports. This article also provides insights into the various types of reports available, enabling you to make informed decisions about which reports are relevant to your program's needs.

2.2 Organize Exported Report Files: Upon exporting the reports, it is essential to save the files in an organized manner. We recommend structuring the file storage based on the program and year. This practice ensures ease of access and facilitates efficient retrieval when referring back to specific reports in the future.

> ⓘ It is recommended to save the reports in a folder labelled with the cohort's program and year for easy retrieval of past data **E.g.: { insert program name} 2021/2022.**

3.0 Members' Deletion

The final step involves deleting all program members. While they have already been made inactive and can no longer access the platform, it is considered a best practice to completely remove them from the platform in preparation for the new cohort. By deleting the members, you ensure a fresh start and avoid clutter in the platform's display and reporting functionalities.

Deleting the program members will:

- Prevents the platform from showing inactive members and relationships alongside the new active ones in the members and relationships sections. This ensures a clear and uncluttered view, focusing solely on the current active members and their relationships.
- Optimizes future reporting. By removing them, you avoid including outdated data in reports alongside active members and relationships.

3.1 Follow the instructions in this article <u>How to permanently delete members</u> to permanently delete all members ahead of the new cohort.

> ⚠ **Do not include the names of Administrator(s) otherwise their profiles will also be permanently deleted.**

2 - Retaining some Program Members and their Data

> ℹ **Definition:** Retaining some program members and their data involves a process where certain members are permanently deleted if they will not be returning, while returning program members are placed in an inactive status until the start of a new program cycle. It is important to note that **all existing data associated with the returning members, including their completed mentoring relationships, will continue to be captured in future reports** and remain accessible on the members & relationships pages.

Steps:

1.0 Deactivate all users.

1.1 Please refer to the <u>steps in the previous section above</u>.

2.0 End all mentoring relationships

Doing this ensures that mentoring relationships are "reset" for returning program members.

2.1 Follow the instructions in this article <u>End mentoring relationships </u>to learn how to end them all simultaneously.

3.0 Reports

To ensure a comprehensive record of the ending cycle, it is advisable to run and export all available reports. These reports contain valuable data that can be utilized for future reference and analysis.

3.1 <u>Learn How to Generate Reports:</u> Refer to the article <u>Generate Reports</u> to access detailed instructions on running reports. This article also provides insights into the various types of reports available, enabling you to make informed decisions about which reports are relevant to your program's needs.

3.2 <u>Organize Exported Report Files:</u> Upon exporting the reports, it is essential to save the files in an organized manner. We recommend structuring the file storage based on the program and year. This practice ensures ease of access and facilitates efficient retrieval when referring back to specific reports in the future.

> ℹ It is recommended to save the reports in a folder labelled with the cohort's program and year for easy retrieval of past data **E.g.: { insert program name} 2021/2022.**

4.0 Member Deletion

The next step consist of deleting program members that will not be returning.

4.1 Follow the instructions in this article <u>How to permanently delete members</u> to permanently delete all members ahead of the new cohort.

> ⚠ **Do not include the names of the <u>returning Members and Administrator(s)</u> that will be a part of the new cohort.**

5.0 Reactivate existing program members

When preparing for the start of a new cohort, in addition to onboarding new members, there are essential steps to take, including the reactivation of returning members. To accomplish this, follow the instructions below:

5.1 Re-activate returning members by accessing the administrator dashboard and clicking on the "Admin" tab located on the left-hand side of the page.
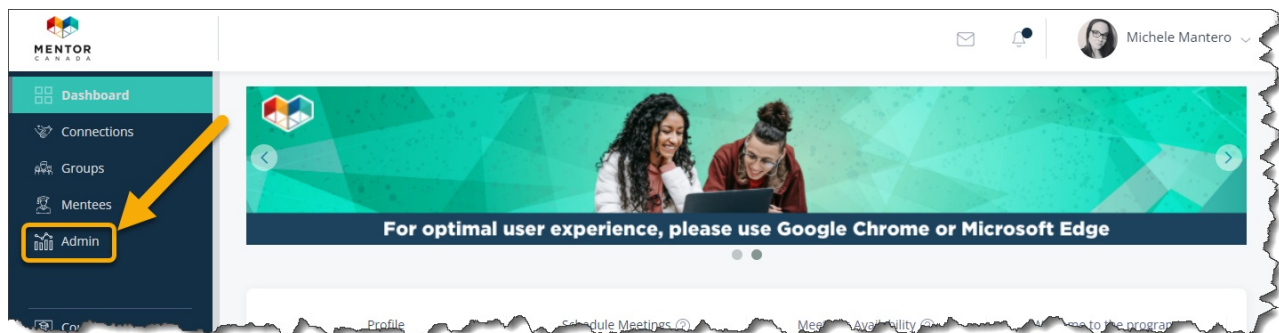
5.1.1 Click on the `Members` tile located on the second row of the administrator dashboard.

5.1.2 Identify the "Is Active" column positioned to the right of each member's name.

5.1.3 Check the box under the "Is Active" column to the right of the name list to activate each returning member.

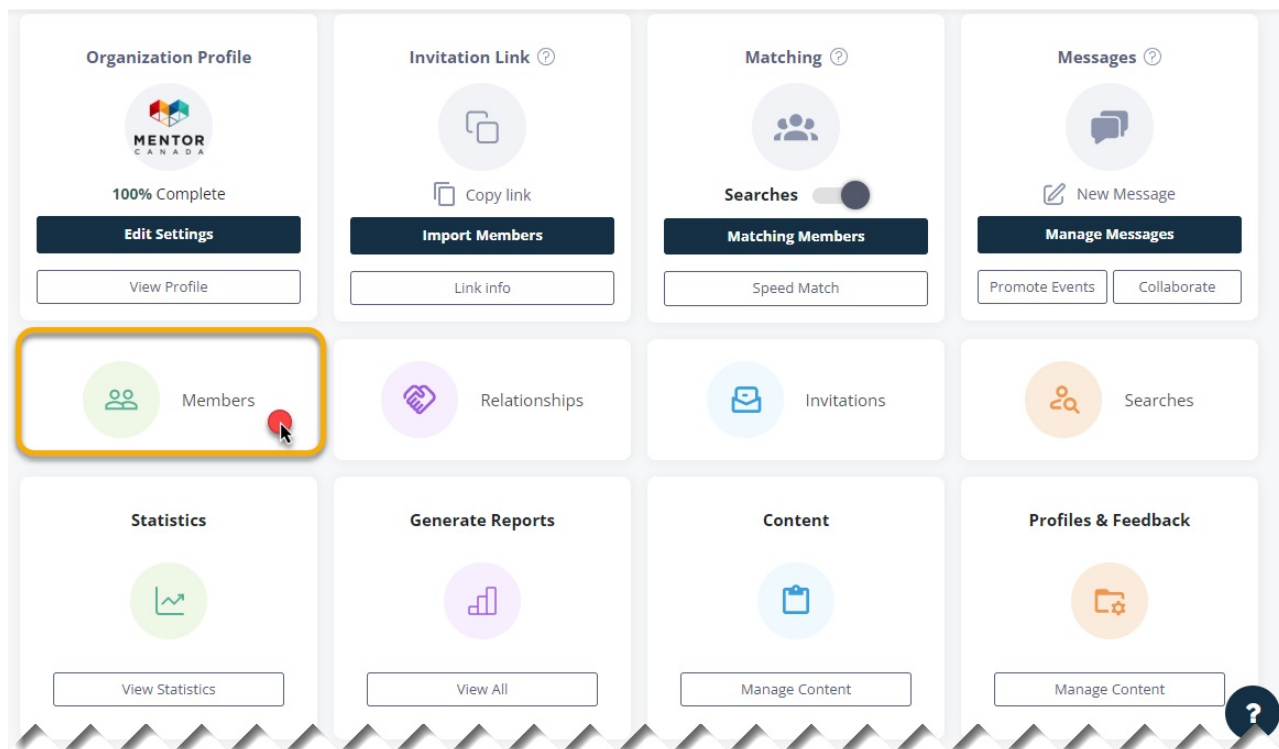| Full Name	Email	Profile Completion	Last Activity	Groups	Groups Name	Matches	Role	Mentoring Hours	Member Since	End Date	Is Active	Member Administrator
Ben Dantzer	ben.dantzer@mentoringcanada.ca	66%	October 6, 2022 8:52AM	0	Add to Group	0		00:00	October 6, 2022		☑	Member Administrator
Test Mac	e.emakpore@gmail.com	27%		0	Add to Group	0	Mentor	00:00	October 5, 2022	October 5, 2022	☑	Member Administrator
Mary Smith	test27-mentor2@mentoringcanada.ca	100%	September 21, 2022 1:40PM	1	Mary's Group Add to Group	2	Mentor	00:00	August 29, 2022		☑	Member Administrator

5.2 Inform returning members to update their user profiles ahead of the new cohort.

3 - Full Members' Refresh and Quick Re-Onboarding for Returning Members

Definition: The process of a full members' refresh and quick re-onboarding for returning members involves permanently deleting all program members, including those who will be returning for the next cycle. As a result, all existing data associated with the returning members and their mentoring relationships will no longer be captured in reports or accessible on the members & relationships pages. However, in this scenario, a program administrator takes the initiative to safeguard the profile information of returning members. This information is saved for a quick re-import at the beginning of the new cycle. This approach eliminates the need for returning members to re-enter profile details they have already provided in the previous cycle. Instead, they can start the new cycle with a fresh set of data while benefiting from the convenience of their previous profile information being readily available.

Steps:

1.0 Deactivate all users.

    1.1 Please refer to the <u>steps in the previous section above</u>.

2.0 Export all Reports

To ensure a comprehensive record of the ending cycle, it is advisable to run and export all available reports. These reports contain valuable data that can be utilized for future reference and analysis.

    2.1 <u>Learn How to Generate Reports:</u> Refer to the article <u>Generate Reports</u> to access detailed instructions on running reports. This article also provides insights into the various types of reports available, enabling you to make informed decisions about which reports are relevant to your program's needs.

    2.2 <u>Organize Exported Report Files:</u> Upon exporting the reports, it is essential to save the files in an organized manner. We recommend structuring the file storage based on the program and year. This practice ensures ease of access and facilitates efficient retrieval when referring back to specific reports in the future.

> ℹ️ It is recommended to save the reports in a folder labelled with the cohort's program and year for easy retrieval of past data **E.g.: { insert program name} 2021/2022.**

3.0 Member Deletion

The final step involves deleting all program members. While they have already been made inactive and can no longer access the platform, it is considered a best practice to completely remove them from the platform in preparation for the new cohort. By deleting the members, you ensure a fresh start and avoid clutter in the platform's display and reporting functionalities.

<u>Deleting the program members will:</u>

- Prevents the platform from showing inactive members and relationships alongside the new active ones in the members and relationships sections. This ensures a clear and uncluttered view, focusing solely on the current active members and their relationships.
- Optimizes future reporting. By removing them, you avoid including outdated data in reports alongside active members and relationships.

    3.1 Follow the instructions in this article <u>How to permanently delete members</u> to permanently delete all members ahead of the new cohort.

> ⚠️ **Do not include the names of the Administrator(s) otherwise they will also be permanently deleted.**

4.0 Re-onboard Returning Members

    4.1 Duplicate the saved *Member's* Report file. To do so, use the "Save As" option in your Excel worksheet.
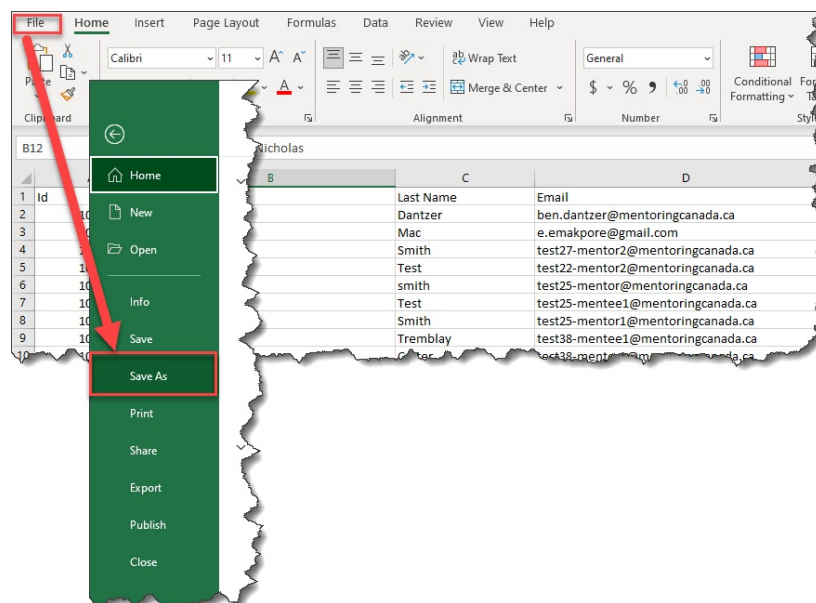
    4.2 Highlight the members to be re-onboarded and delete the others.

	A	B	C	D
1	Id	First Name	Last Name	Email
2	1047584071	Ben	Dantzer	ben.dantzer@mentoringcanada.ca
3	1047583998	Test	Mac	e.emakpore@gmail.com
4	1047567979	Mary	Smith	test27-mentor2@mentoringcanada.ca
5	1047567973	Charlotte	Test	test22-mentor2@mentoringcanada.ca
6	1047567021	joe	smith	test25-mentor@mentoringcanada.ca
7	1047567017	Sandy	Test	test25-mentee1@mentoringcanada.ca
8	1047567015	David	Smith	test25-mentor1@mentoringcanada.ca
9	1047562107	Joel	Tremblay	test38-mentee1@mentoringcanada.ca
10	1047562037	Anna	Carter	test38-mentor1@mentoringcanada.ca
11	1047558184	Andrea	Test	michele.mantero+1@mentoringcanada.ca
12	1047557678	Nicholas	Johnson	test2-mentee1@mentoringcanada.ca
13	1047557676	Luca	Smith	test2-mentor1@mentoringcanada.ca
14	1047556102	John	Smith	sample_user3@gmail.com
15	1047556101	Hellen	Hanes	sample_user2@gmail.com
16	1047556100	Topher	Allman	sample_user1@gmail.com
17	1047554204	Mohamed	Salah	support@mentoringcanada.ca
18	1047552384	Lina	Chan	test32-mentee1@mentoringcanada.ca
19	1047552377	Kerrie	Test	test35-mentor1@mentoringcanada.ca
20	1047552163	tim	tim	shawn.mintz+888@mentorcity.com
21	1047552137	Adrian	Kaats	adrian.kaats@bigbrothersbigsisters.ca
22	1047552136	Joan	Test	test35-mentee1@mentoringcanada.ca
23	104755024	Charlie	Test	test33-mentee1@mentoringcanada.ca

4.3 Highlight the columns with the relevant profile fields and custom fields data to be re-imported, then delete the irrelevant columns.

4.3.1 Don't forget to save your updates.

	A	B	C	D	E	F	G	H	I
1	First Name	Last Name	Email	Country	State/Province	City	Specialized Skills	Development Areas	Favorite Sport
2	Charlotte	Test	test22-mentor2@mentoringcanada.ca	Canada	Quebec	Laval		Adaptability,Collaboration,Communication,Self-confidence,Innovation,Leadership,Proactivit	Baseball, Hockey, Soccer
3	joe	smith	test25-mentor@mentoringcanada.ca	Canada	Ontario	Toronto	Adaptability,Collaboration,Communication,Innovation,Leadership,Networking,Self-		Football, Hockey, Soccer
4	Sandy	Test	test25-mentee1@mentoringcanada.ca	Canada	Ontario	Toronto		Adaptability,Collaboration,Communication,Leadership,Self-confidence	Hockey, Soccer
5	David	Smith	test25-mentor1@mentoringcanada.ca	Canada	Ontario	Toronto	Adaptability,Collaboration,Innovation,Presentation Skills,Problem Solving,Self-		Baseball, Football, Hockey
6	Joel	Tremblay	test38-mentee1@mentoringcanada.ca	Canada	Manitoba	Winnipeg		Collaboration,Innovation,Leadership,Netwo	Baseball, Football
7	Nicholas	Johnson	test2-mentee1@mentoringcanada.ca	Canada	Alberta	Leduc		Adaptability,Collaboration,Communication,	Baseball, Football
8	Mohamed	Salah	support@mentoringcanada.ca	Canada	Manitoba	Winnipeg	Communication	Communication	Soccer

4.4 Follow the instructions provided in the `Member Import tool` and re-upload the returning members' data.

4.5 Inform returning members to update their user profiles ahead of the new cohort.

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