

Generate Reports

- [Context](#)
- [Available Reports](#)
- [Advanced Filtering Capabilities to Generate Custom Reports](#)
- [Distinct Reports for Surveys and Evaluations](#)
- [Mentors/Mentee's Notes and Messages Captured in Reports](#)

Context

In addition to the existing reports and analytics, the virtual mentoring platform provides advanced capabilities to help you efficiently navigate your program data:

1. Custom Member Reports with Advanced Filtering:

Take advantage of advanced filtering capabilities to generate custom member reports tailored to your specific requirements.

2. Surveys and Program Evaluations Reports:

Access distinct reports dedicated to surveys and program evaluations, enabling you to analyze feedback and insights effectively.

3. Relationship Reports with Notes and Messages:

Gain valuable insights by accessing relationship reports that capture notes and messages exchanged between mentors and mentees.

These enhanced reporting capabilities aim to streamline your data analysis process and provide valuable information for optimizing your mentoring program. Let's explore these features in detail to maximize the potential of your program data.

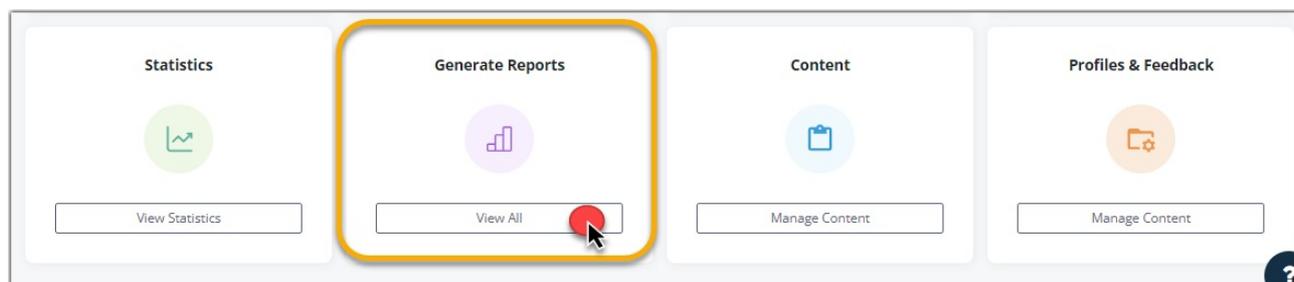
Available Reports

MentorCity offers 6 prepared reports on the platform:

- Members Report
- Relationships Report
- Meetings Report for Relationships
- Meetings Report for Members
- Program Evaluation Report
- Survey Report

The above-mentioned reports can be generated from the administrator dashboard under the Reports section.

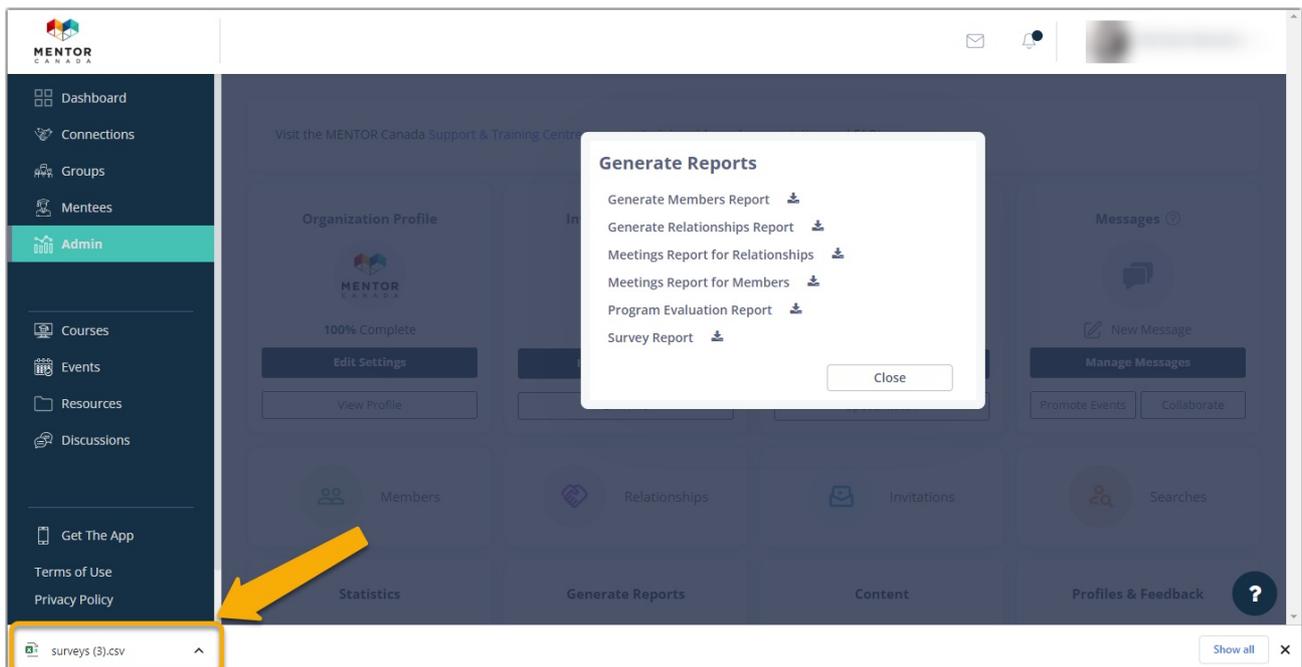
From the administrator dashboard, navigate to the "Generate Reports" tile located on the third row, and click on "View All" to access the corresponding section.



A new dialog box will appear. Click on the desired report.



Upon completion of the process, the system will automatically generate a CSV report, which will be promptly available in your download folder. Simply click on the document to open and access the data it contains.

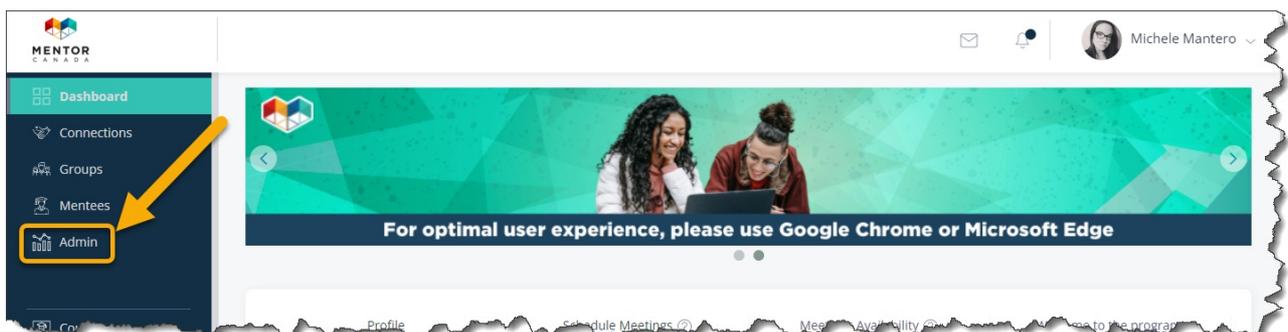


Advanced Filtering Capabilities to Generate Custom Reports

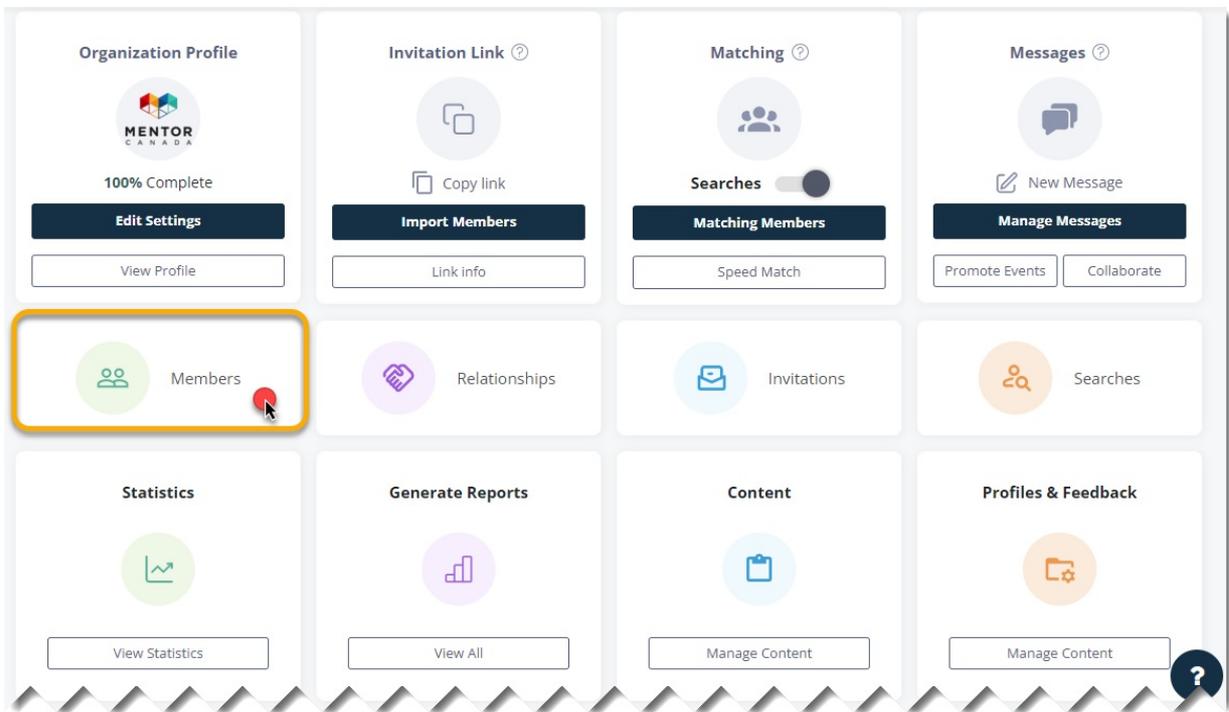
The virtual mentoring platform offers custom reports for program administrators. This allows program administrators to focus on data that matters most to them.

To generate a custom report, follow these steps:

1.0 Click the "Admin" tab on the left-hand side of the platform to access your administrator's dashboard.



1.1 Click on "Members" located on the second row of the administrator dashboard.



1.2 Click "Custom Report" to select the data to be generated in the report.

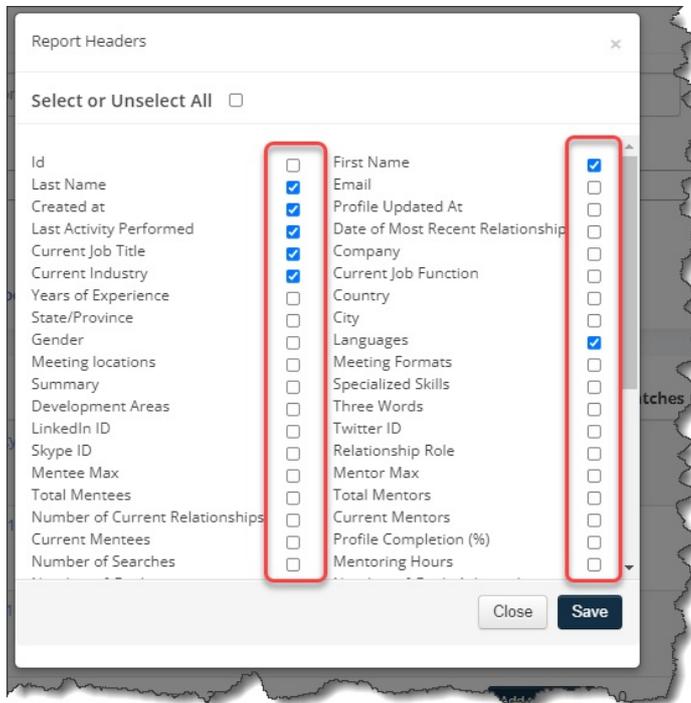
The 'Members' page includes a search bar and filter options:

- Search: Enter first name, last name, or email
- Advanced Filter
- Select Role: Everyone
- Custom Field: Please Select
- Options: Please Select
- Search
- Save Search Filter

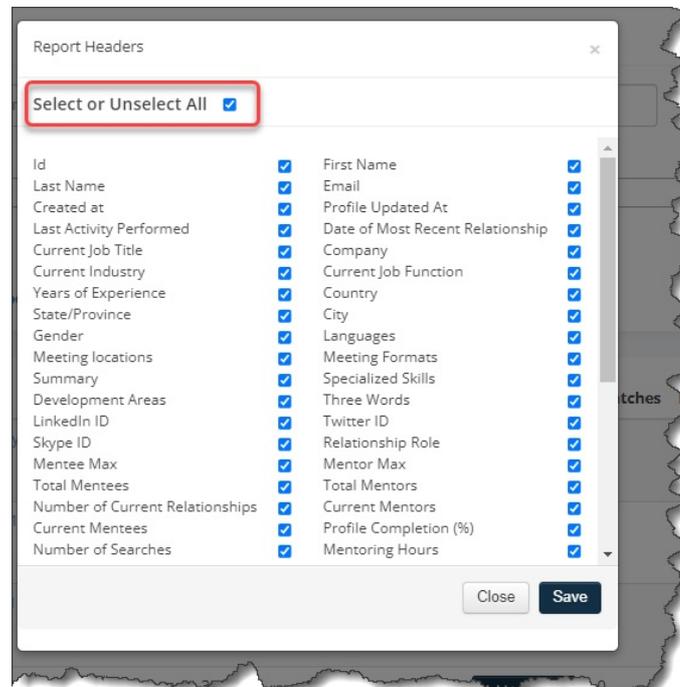
Download Reports: Full Report, Custom Report (highlighted)

Full Name	Email	Profile Completion	Last Activity	Groups	Groups Name	Matches	Role	Mentoring Hours	Member Since	End Date	Is Active	Mei
Jeff Ss	jeff@mentorcity.com	33%	March 22, 2022 5:00PM	0	Add to Group	0		00:00	March 22, 2022		<input checked="" type="checkbox"/>	M
Lina Chan	test32-mentee1@mentoringcanada.ca	42%	December 13, 2021 11:40AM	0	Add to Group	0	Mentor	00:00	December 13, 2021		<input checked="" type="checkbox"/>	M
Kerrie Test	test35-mentor1@mentoringcanada.ca	42%	December 13, 2021 8:33AM	0	Add to Group	0	Mentee	00:00	December 13, 2021		<input checked="" type="checkbox"/>	M
Adrian Kaats	adrian.kaats@bigbrothersbigsisters.ca	33%	December 13, 2021	0	Add to Group	0		00:00	December 13, 2021		<input checked="" type="checkbox"/>	M

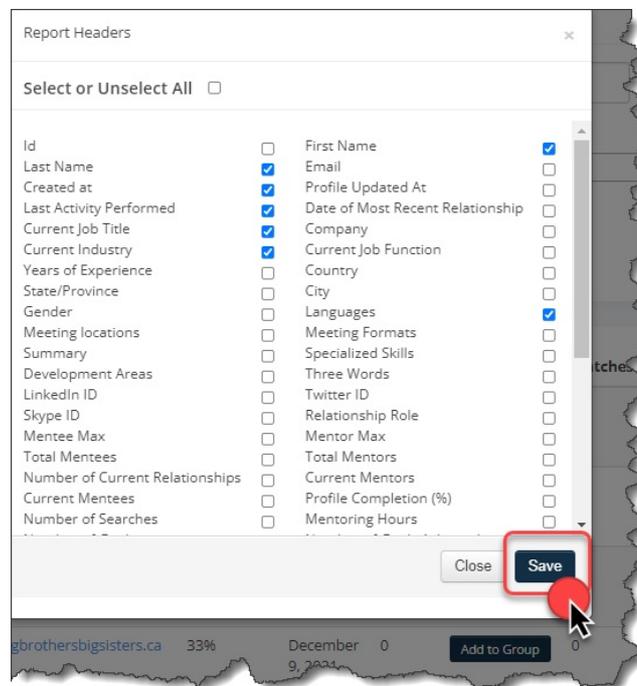
1.3 Select all fields that you want to report on.



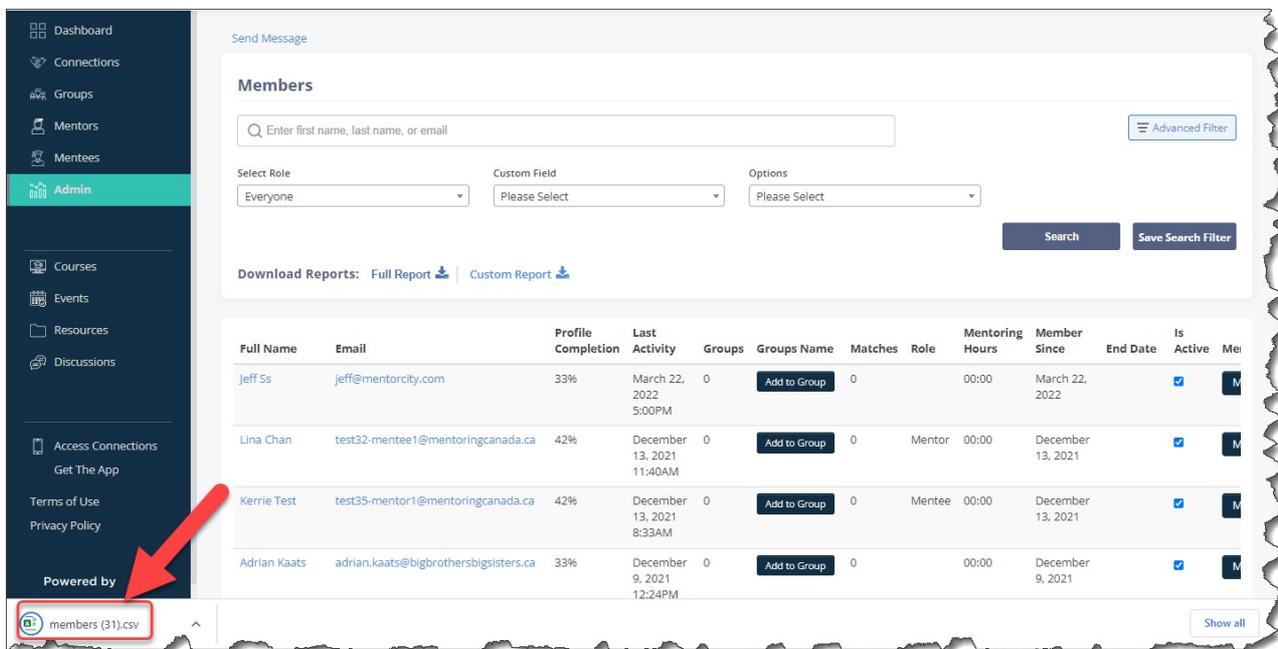
1.3.1 You can also choose "Select All" if you want to see all data for all fields.



1.4 Click **Save**.



1.5 Upon completion of the process, the system will automatically generate a CSV report, which will be promptly available in your download folder. Simply click on the document to open and access the data it contains.

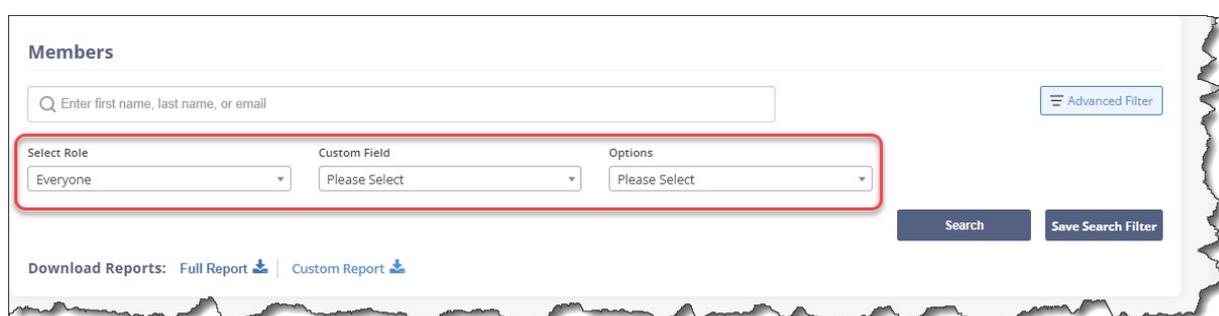


Advanced Report Filters

To further narrow down the report data, you can use some filters before generating a custom reports. For instance, if you want a custom report that only displays information pertaining to mentors instead of all users.

1.6 From the members page, use the filters at the top of the page. There are 3 filters provided:

- o Role
- o Custom field
- o Options (related to options listed in your custom fields)



1.6.1 Advanced filters are also available, which allows you to filter by:

- o Industries
- o Job Functions
- o Profile Completeness Less Than
- o Created on Greater Than
- o Current positions only
- o Account enabled (member is active)
- o Recent activity
- o Relationships

Members

Q Enter first name, last name, or email

Advanced Filter

Select Role: Everyone

Custom Field: Please Select

Options: //

Industries: //

Job Functions: //

Profile Completeness Less Than: []

Created On Greater Than: []

Current positions only:

Account enabled (member is active): Please Select

Recent activity: Please Select

Relationships: Please Select

Search Save Search Filter

Clear Filters

Download Reports: Full Report Custom Report

Note: Use all or some of the filters, you do not need to use them all. In this example, we will narrow down the results to the role of mentor, with baseball as their favorite sport, and that have a Profile Completeness Less Than 80%.

1.7 Once you have made your choice of filters, you can click **Search**, or, you can save this filter for future searches by clicking **Save Search Filter**.

Members

Q Enter first name, last name, or email

Advanced Filter

Select Role: mentor

Custom Field: favorite sports

Options: Baseball

Industries: //

Job Functions: //

Profile Completeness Less Than: 80

Created On Greater Than: M/d/yy

Is Active:

Search Save Search Filter

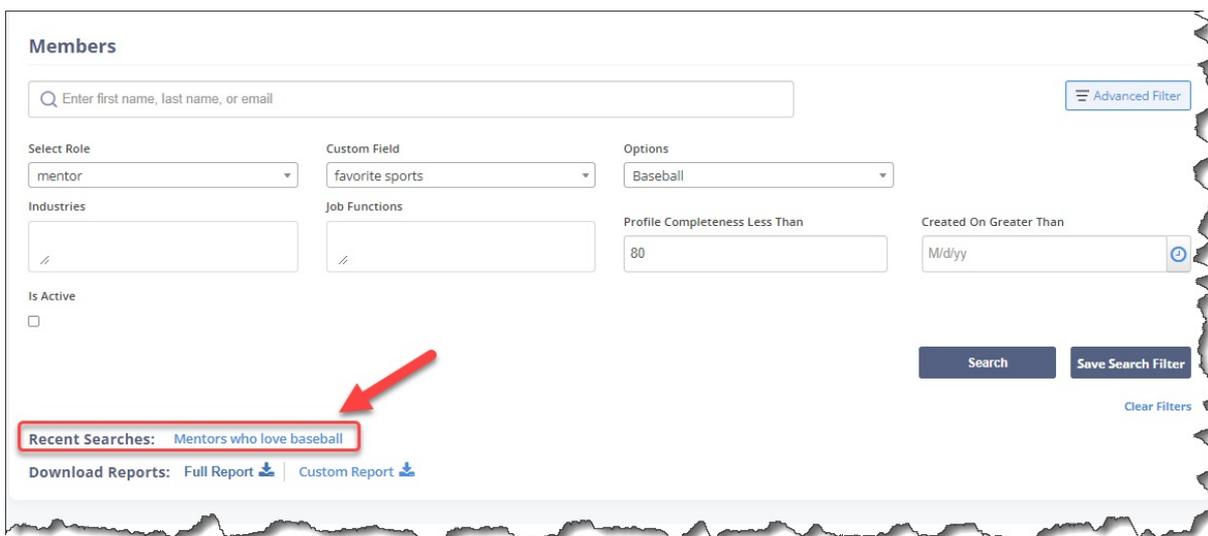
Clear Filters

Download Reports: Full Report Custom Report

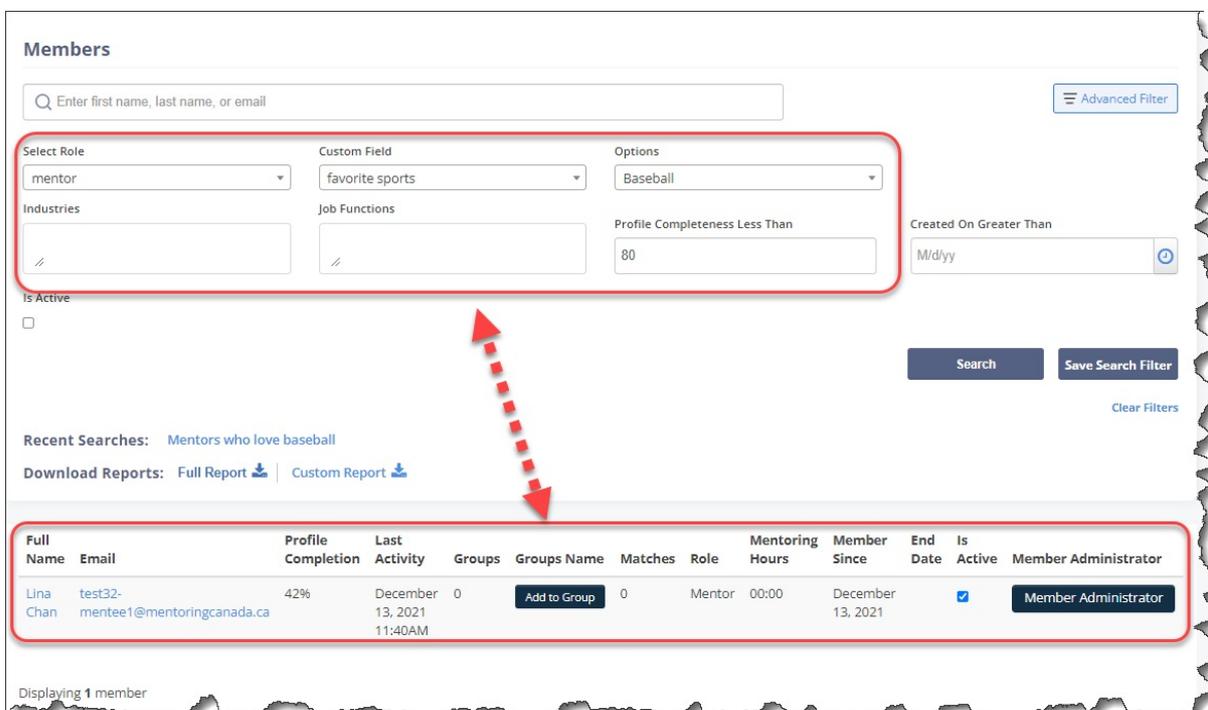
1.7.1 Give the saved filter a title and click **Save Filter**.



1.7.2 The saved filter now appears under "Recent Searches" for future searches.



1.8 Once you click **Search**, you will see the narrowed down results. In this example, we only have 1 mentor that matches the search criteria entered.



1.9 From the narrowed down results, you can now issue a custom report.

Recent Searches: Mentors who love baseball

Download Reports: Full Report Custom Report

Full Name	Email	Profile Completion	Last Activity	Groups	Groups Name	Matches	Role	Mentoring Hours	Member Since	End Date	Is Active	Member Administrator
Lina Chan	test32-mentee1@mentoringcanada.ca	42%	December 13, 2021 11:40AM	0	Add to Group	0	Mentor	00:00	December 13, 2021		<input checked="" type="checkbox"/>	Member Administrator

Displaying 1 member

Report Headers

Select or Unselect All

<input type="checkbox"/>	Id	<input type="checkbox"/>	First Name	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Last Name	<input checked="" type="checkbox"/>	Email	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Created at	<input checked="" type="checkbox"/>	Profile Updated At	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Last Activity Performed	<input checked="" type="checkbox"/>	Date of Most Recent Relationship	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Current Job Title	<input checked="" type="checkbox"/>	Company	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Current Industry	<input checked="" type="checkbox"/>	Current Job Function	<input type="checkbox"/>
<input type="checkbox"/>	Years of Experience	<input type="checkbox"/>	Country	<input type="checkbox"/>
<input type="checkbox"/>	State/Province	<input type="checkbox"/>	City	<input type="checkbox"/>
<input type="checkbox"/>	Gender	<input type="checkbox"/>	Languages	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Meeting locations	<input type="checkbox"/>	Meeting Formats	<input type="checkbox"/>
<input type="checkbox"/>	Summary	<input type="checkbox"/>	Specialized Skills	<input type="checkbox"/>
<input type="checkbox"/>	Development Areas	<input type="checkbox"/>	Three Words	<input type="checkbox"/>
<input type="checkbox"/>	LinkedIn ID	<input type="checkbox"/>	Twitter ID	<input type="checkbox"/>
<input type="checkbox"/>	Skype ID	<input type="checkbox"/>	Relationship Role	<input type="checkbox"/>
<input type="checkbox"/>	Mentee Max	<input type="checkbox"/>	Mentor Max	<input type="checkbox"/>
<input type="checkbox"/>	Total Mentees	<input type="checkbox"/>	Total Mentors	<input type="checkbox"/>
<input type="checkbox"/>	Number of Current Relationships	<input type="checkbox"/>	Current Mentors	<input type="checkbox"/>
<input type="checkbox"/>	Current Mentees	<input type="checkbox"/>	Profile Completion (%)	<input type="checkbox"/>
<input type="checkbox"/>	Number of Searches	<input type="checkbox"/>	Mentoring Hours	<input type="checkbox"/>

Close Save

Distinct Reports for Surveys and Evaluations

The virtual mentoring platform offers individual reports to present surveys and evaluations responses. Surveys and evaluations responses were previously contained in the Members Report, which contains a variety of other information.

Access the Survey and Evaluation Reports

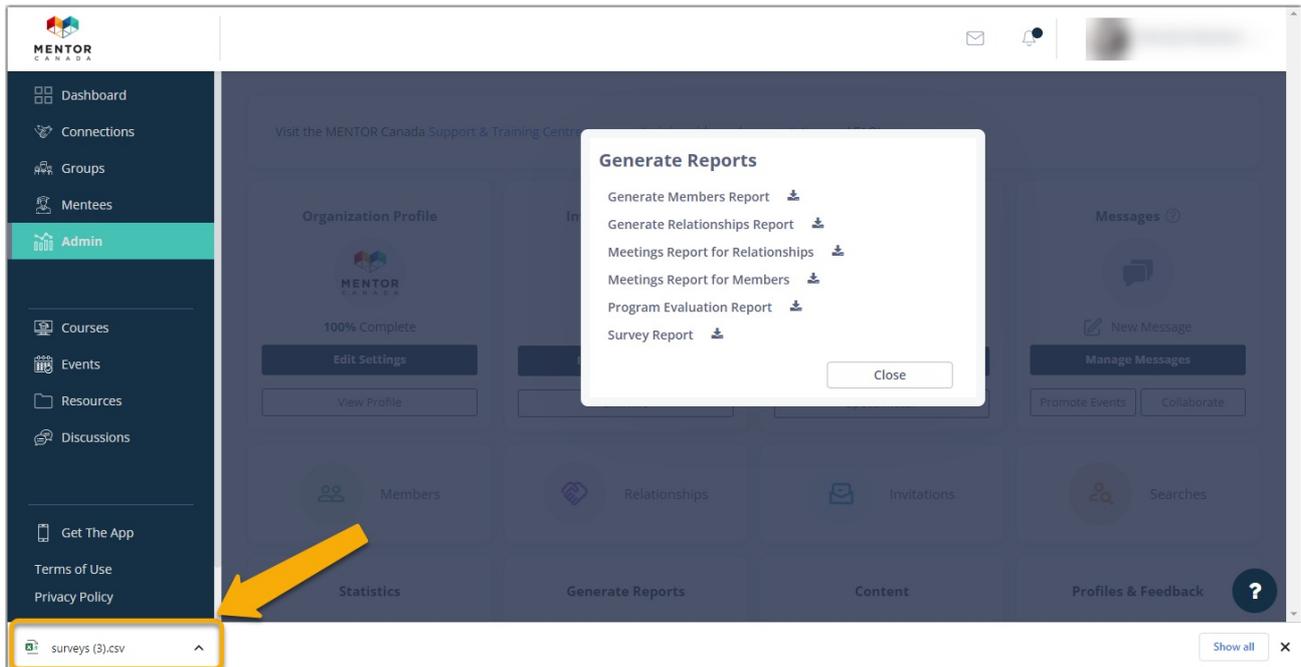
2.0 Click the "Admin" tab on the left-hand side of the platform to access your administrators dashboard.

2.1 From the administrator dashboard, navigate to the "Generate Reports" tile located on the third row, and click on "View All" to access the corresponding section.

2.2 A new dialog box will appear. Click on the "Program Evaluation Report" or the "Survey Report".



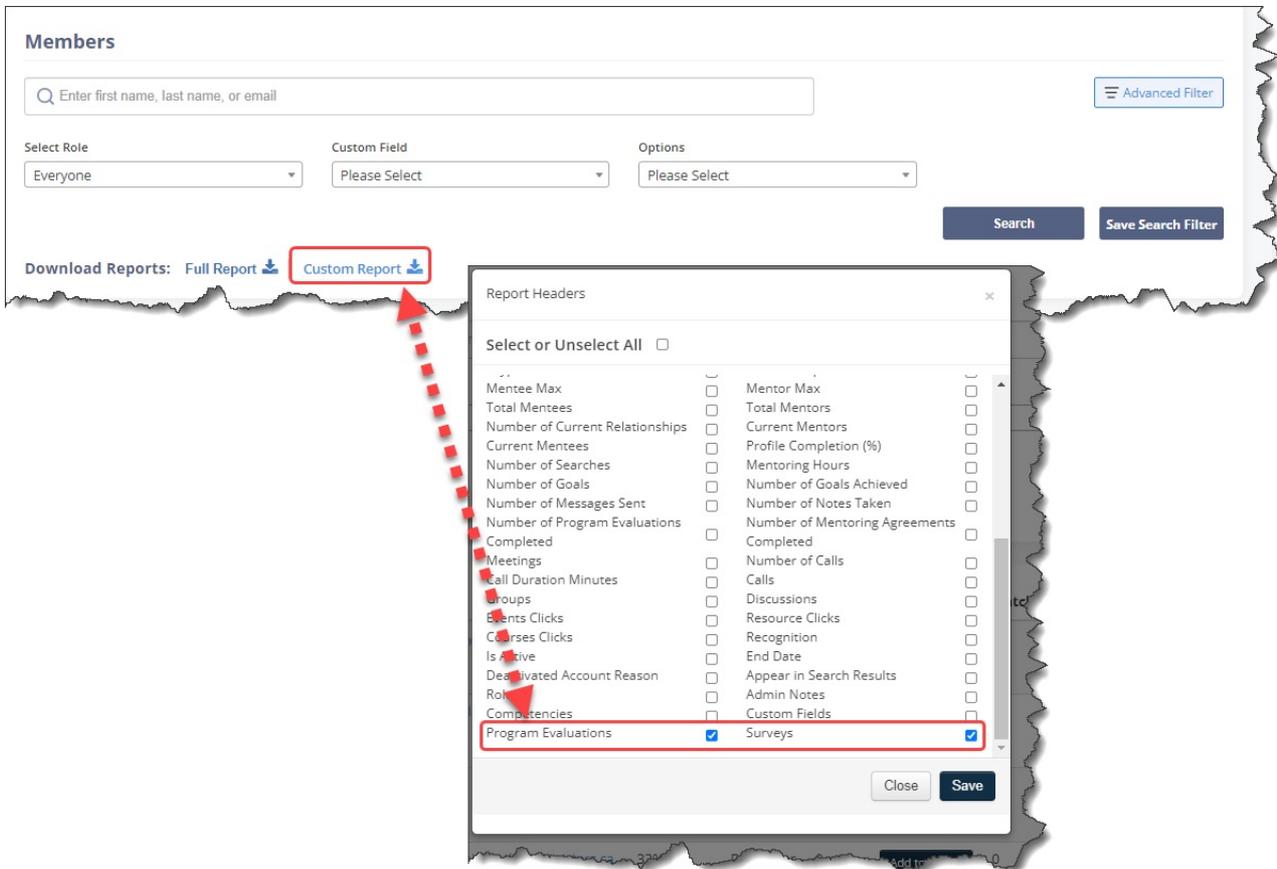
2.3 Upon completion of the process, the system will automatically generate a CSV report, which will be promptly available in your download folder. Simply click on the document to open and access the data it contains.



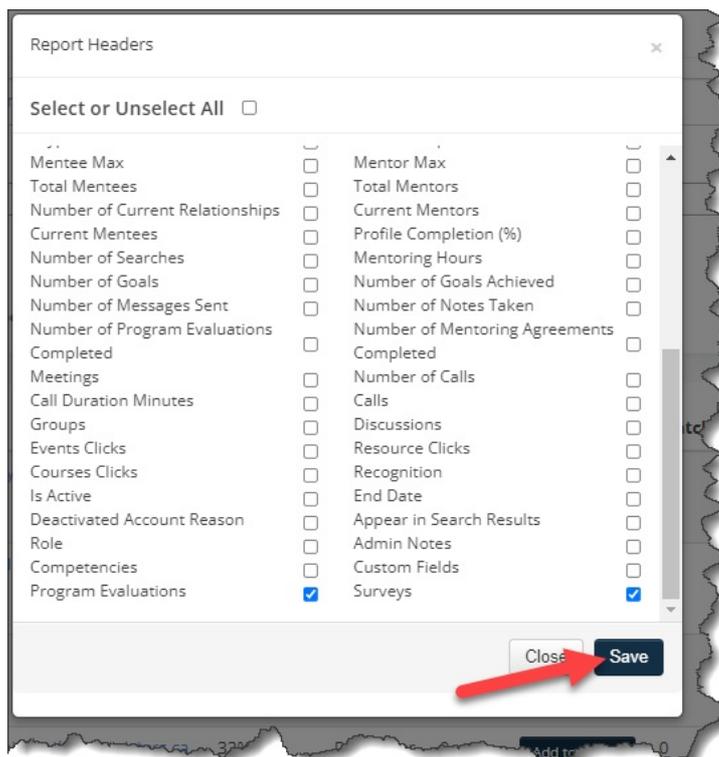
Another way to retrieve survey and evaluation responses on reports is by using the custom reports feature.

2.4 From the "Members" Section, click "Custom Report".

2.5 Select "Program Evaluation" and "Surveys" along with other fields you wish to display on the report.



2.6 Click **Save**.



Mentors/Mentee's Notes and Messages Captured in Reports

For programs that have access to view mentors and mentees' messages and notes, these will now be captured in reports.

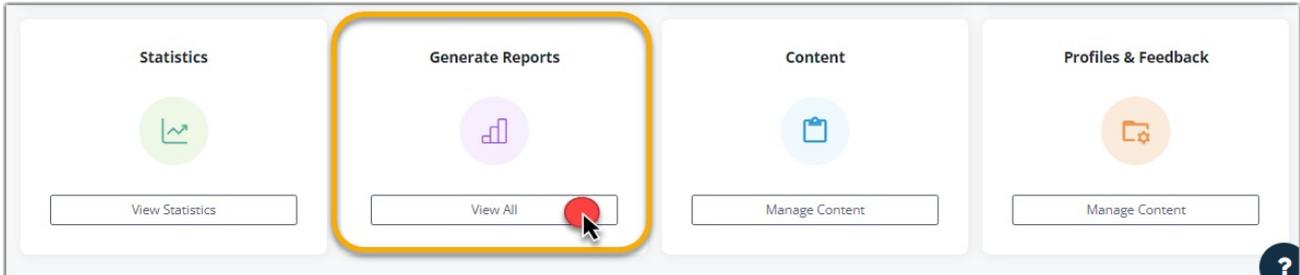
Note: A request must be sent to support@mentoringcanada.ca to gain access to view notes and messages. The default setting for all new programs joining the virtual mentoring platform is to disable this access.

[To view mentors and mentees' notes and messages in reports, follow these steps:](#)

3.0 Click the "Admin" tab on the left-hand side of the platform to access your administrator dashboard.



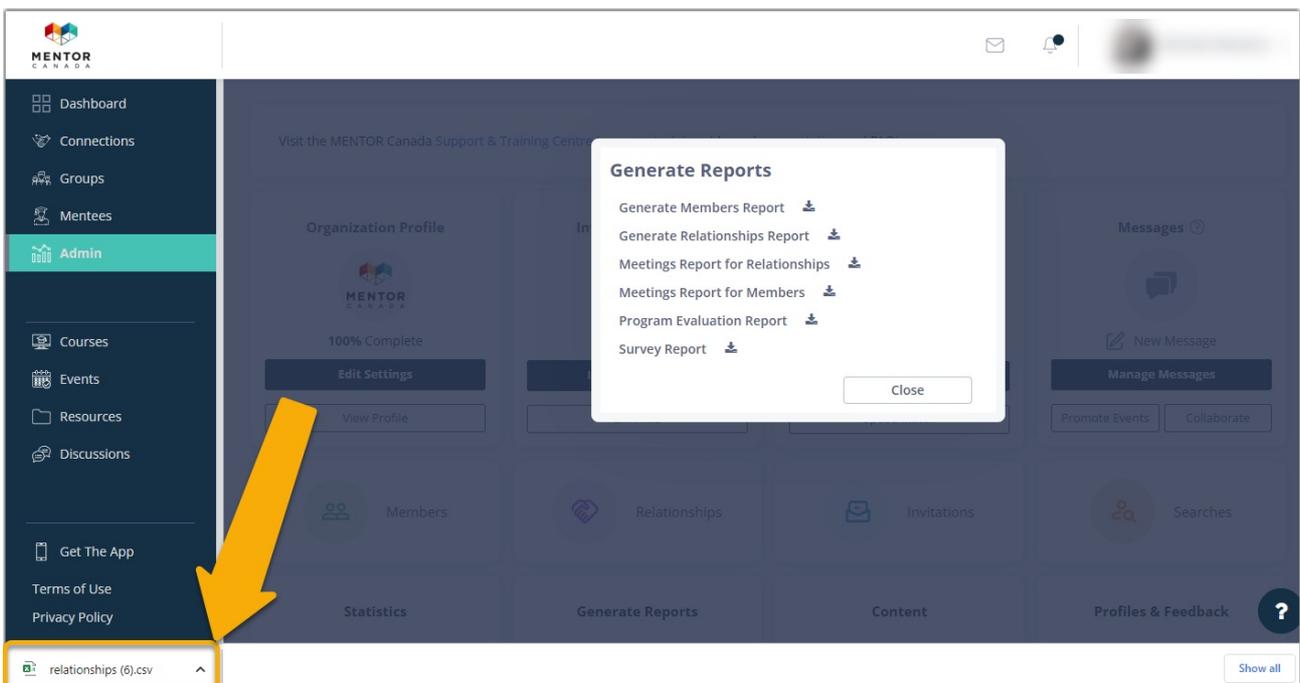
3.1 From the administrator dashboard, navigate to the "Generate Reports" tile located on the third row, and click on "View All" to access the corresponding section.



3.2 A new dialog box will appear. Click on "Generate Relationships Report".



3.3 Once the process is complete, the system will generate a report in the form of a CSV file located at the bottom of the page. Simply click on the document to open and access the data it contains.



3.4 Messages appear in column AQ and notes in columns AR and AS.

AI	AJ	AK	AL	AM	AN	AO	AP	AQ	AR	AS	AT	AU	AV	AW
1	Number of Meetings	Calls Cour	Duration c	Calls	Mentor Ex	Request T	Admin	Me Posts	Mentor Notes	Mentee Notes	Mentoring	Mentoring	Mentoring	Mentoring
2	1	Date: Nov	1	0.416667	Date: Jan	No	mentee	No	Mentor 2021-06-02, 17:52: Hi Turie, please let me know if you get an email notification for this message Mentee 2021-06-02, 19:49: Message received. I also got the email notification! Mentor 2021-07-05, 11:11: Hi Turie, can we chat for a minute?					
3	0		0	0		No	mentor	Yes						
4	2	Date: Aug	1	0.166667	Date: Aug	No	mentor	Yes						
5	0		0	0		No	mentee	No						
6	0		0	0		No	mentee	No						
7	2	Date: Oct	0	0		No	mentor	Yes						
8	0		0	0		No	mentor	Yes						
9	0		0	0		No	mentor	Yes						
10	0		0	0		No	mentor	Yes						
11	0		0	0		No	mentor	Yes						
12	0		0	0		No	mentor	Yes						
13	0		0	0		No	mentor	Yes						
14	0		0	0		No	mentor	Yes	Mentee 2021-06-04, 12:37: Hi Julie, nice to meet you!					
	0	Date: May	0	0		No	mentor	No	Mentee 2022-05-16, 15:54: Bonjour Nelly Mentee 2022-05-16, 15:56:					

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

Revision #47
 Created Fri, Jun 10, 2022 9:22 PM by Michèle Mantero
 Updated Fri, Feb 2, 2024 5:04 PM by Michèle Mantero