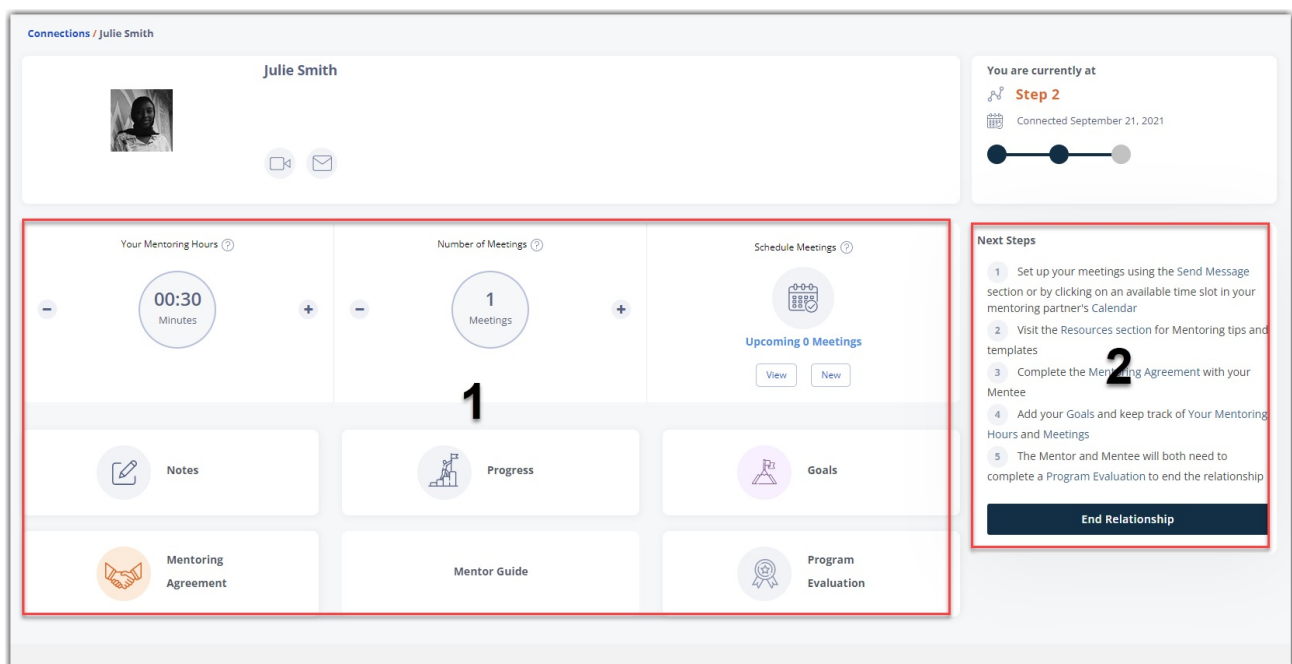


Relationship Dashboard

- [Relationship Dashboard](#)
- [Customizing the Relationship Dashboard](#)
- [Relationship Settings](#)
- [Steps Settings](#)
- [Relationship Steps](#)
- [Tags](#)
- [Custom Widget](#)

Relationship Dashboard

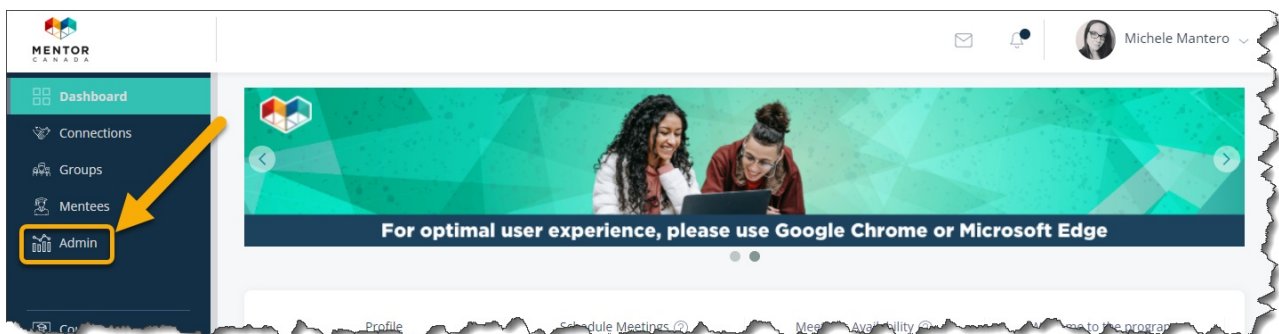
MentorCity have integrated a new design into the *Connections* section of the platform. This flexible relationship dashboard provides program administrators with the ability to customize their program even more by changing the **(1)** dashboard widgets and the **(2)** Next Steps section.



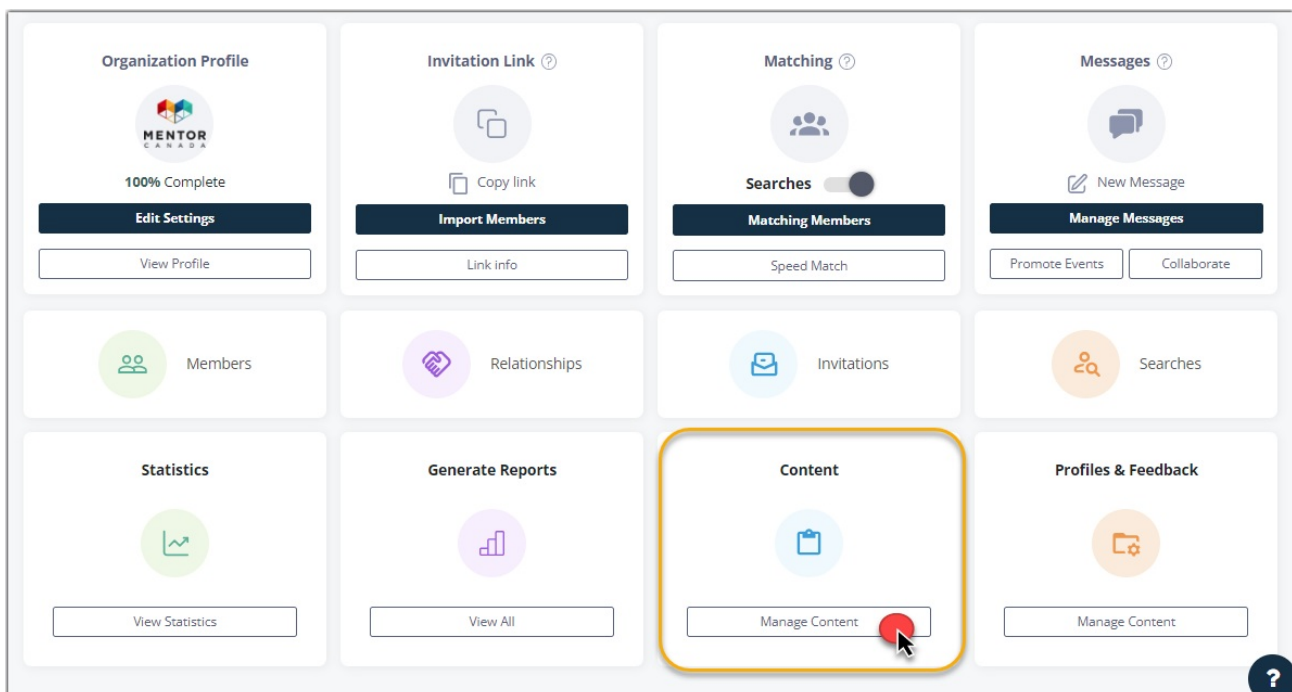
Customizing the Relationship Dashboard

To customize the relationship dashboard follow these steps:

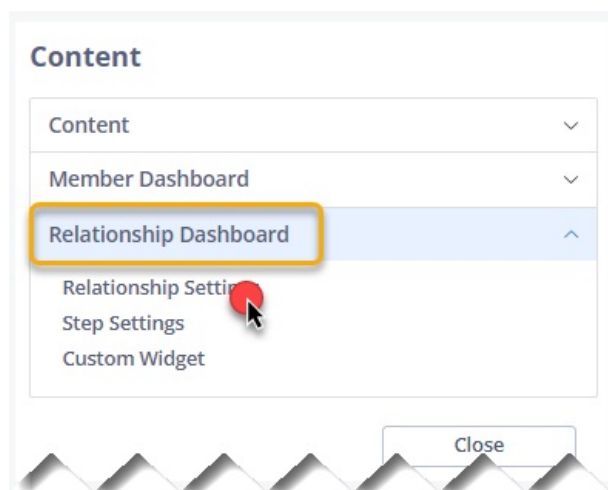
1. Click the "Admin" tab on the left-hand side of the screen to access your administrator's dashboard.



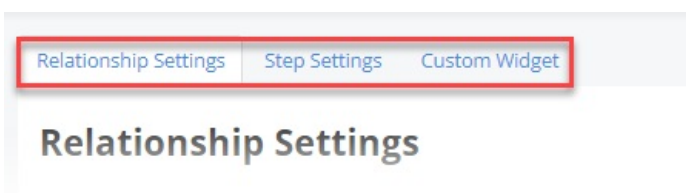
- 1.2 From the administrator dashboard, navigate to the "Content" tile located on the third row, and click on "Manage Content" to access the corresponding section.



1.2.1 A new dialog box will appear. Expand the selections by clicking on "Relationship Dashboard" and subsequently choose "Relationship Settings."



1.3 You will be presented with 3 tabs:



- **Relationship Settings:** This is where you can customize the widgets location on the relationship dashboard.
- **Step Settings:** This is where you can customize the content that's displayed in the *Next Steps* section on the relationship page.
- **Custom Widget:** This is where you can create a widget for the relationship dashboard.

Relationship Settings

2. In this section, you can add, remove, or have blank widgets on the relationship dashboard based on the structure of your mentoring program.

2.1 For each row of the dashboard make a selection by clicking the widget # to bring up a drop-down menu.

2.2 Click **Save Settings** once you have make your selections on each row.

Relationship Settings
Step Settings
Custom Widget

Relationship Settings

Relationship Row 1

Row1 widget 1
Mentoring Hours

Row1 widget 2
Meetings

Row1 widget 3
Schedule Meetings

Relationship Row 2

Row2 widget 1
Notes

Row2 widget 3
Goals

Relationship Row 3

Row3 widget 1
Mentoring Agreement

Row3 widget 3
Program Evaluation

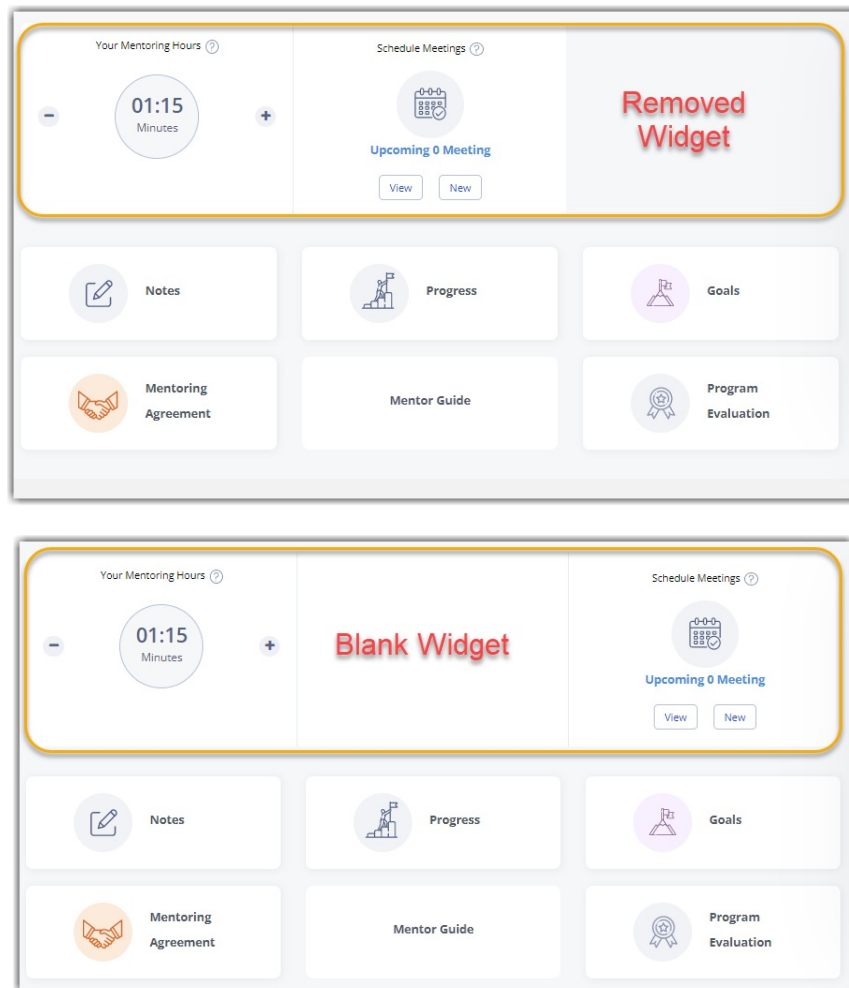
Save Settings

Relationship Dashboard - Widget Definitions

Row 1	
Remove Widget	This removes the widget from the row. If you remove the three widgets in the first row, then the row will be removed.
Blank Widget	This will look like the widget is still there but displays an empty white space.
Mentoring Hours	Displays and allows your members to adjust the mentoring hours for the relationship that they are viewing.
Meetings	Displays and allows your members to adjust the number of meetings for the relationship they are viewing.
Schedule Meetings	Allows your members to schedule a meeting with their mentor or mentee.
Meeting Availability	Allows mentors and mentees to set up their availability for meetings.
Custom Widget	Create your own custom and personalize widget to better suit the needs of your program.
Row 2 and 3	
Remove Widget	This removes the widget from the row. If you remove the three widgets in the first row then the row will be removed.
Blank Widget	This will look like the widget is still there by displays an empty white space.
Notes	Allows members to write notes for the relationship they are viewing.
Progress	Display the number of meetings, the number of mentoring hours, and the number of goals set for the relationship they are viewing.
Goals	Allows your members to add, edit and check off goals once they are achieved for the relationship they are viewing.

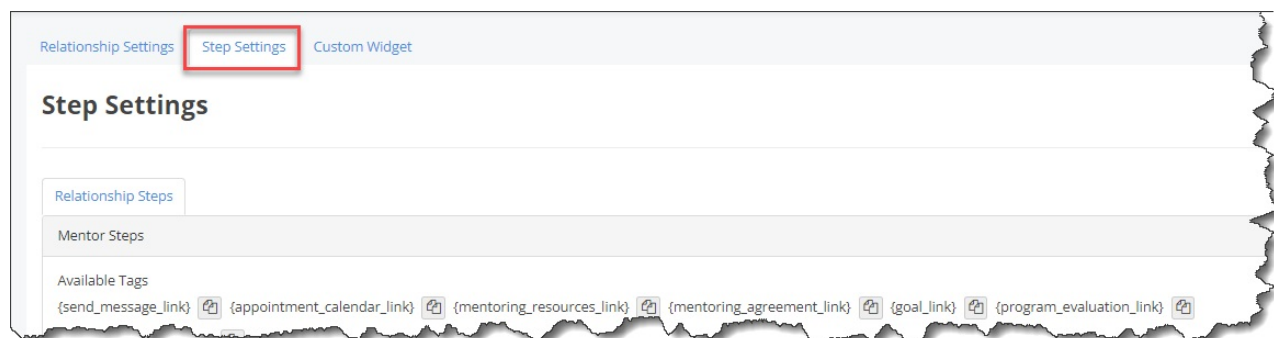
Mentoring Agreement	Allows your members to view, edit and fill out their mentoring agreement for the relationship they are viewing.
Resources	Provides a quick link to the resources page.
Program Evaluation	Allows your members to complete the program evaluation at the end of their mentoring relationship.
Custom Widget	Create your own custom and personalize widget to better suit the needs of your program.

Removed Widget vs Blank Widget



Steps Settings

3. The *Step Settings* tab allows program administrators to customize the *Next Step* section of the relationship dashboard which indicates to mentors and mentees the steps they should take at different stages of their mentoring relationship.



3.1 The *Step Settings* tab allows you to customize the next steps to take for each stage of the mentoring relationship in 3 steps:

- **Step 1** - When a mentoring invitation is sent

- **Step 2** - When the relationship is established
- **Step 3** - When the relationship is completed

You are currently at

Step 1

Connected

Request received

Next Steps

- 1 To confirm this relationship, your Mentee will need to accept your invitation.
- 2 If you do not hear back from them in a couple of days, send them a follow-up email in the Send Message section.
- 3 If your Mentee doesn't accept your invitation, the relationship will be deleted from your relationship page and you can continue to search for another Mentee.

Withdraw This Request

You are currently at

Step 2

Connected October 31, 2022

Relationship established

Next Steps

- 1 Set up your meetings using the Send Message section or by clicking on an available time slot in your mentoring partner's Calendar
- 2 Visit the Resources section for Mentoring tips and templates
- 3 Complete the Mentoring Agreement with your Mentee
- 4 Add your Goals and keep track of Your Mentoring Hours and Meetings
- 5 The Mentor and Mentee will both need to complete a Program Evaluation to end the relationship

End Relationship

You are currently at

Step 3

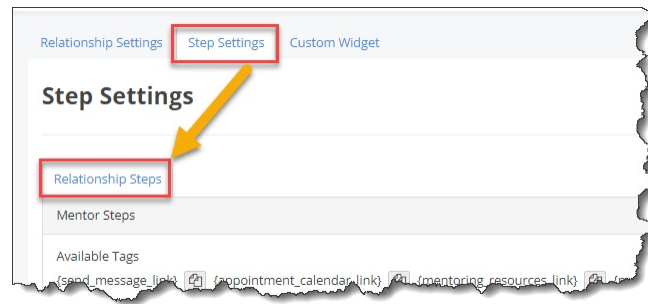
Connected November 22, 2021

Relationship complete

Next Steps

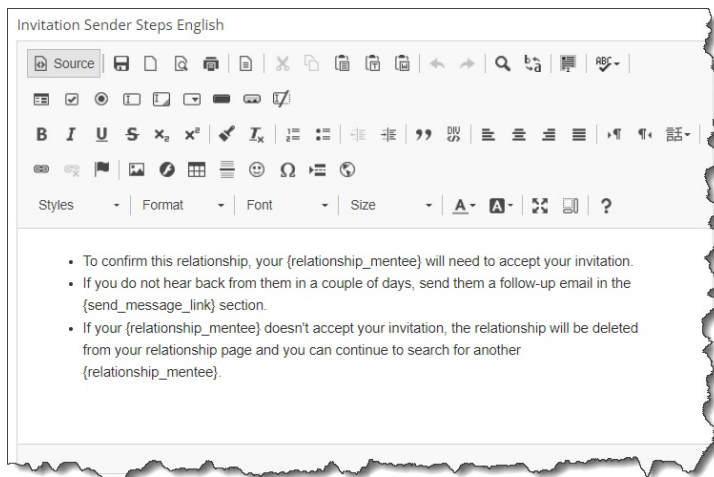
- 1 Your relationship has been completed, you will still be able to view this page and send messages

3.2 The *Relationship Steps* can be set up under the *Step Settings* tab. The section is pre-filled with steps that you can customize to better suits the needs of your program.

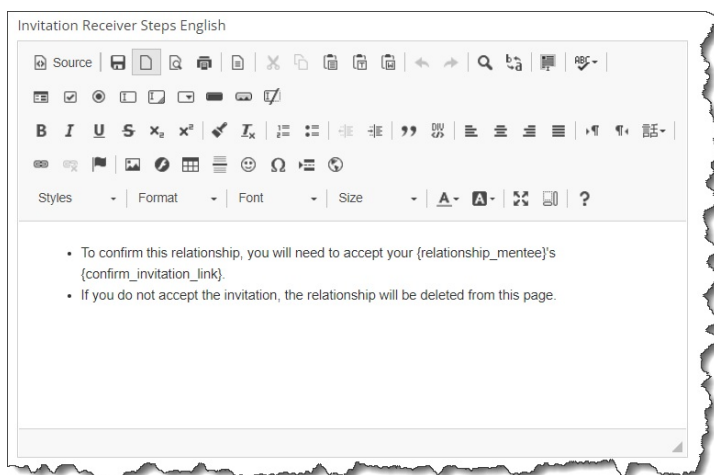


3.3 In the *Relationship Steps* section, you will find the following:

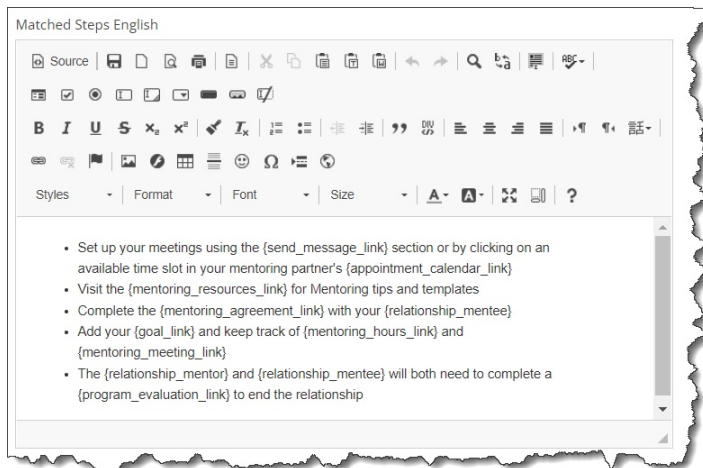
Mentor Steps:



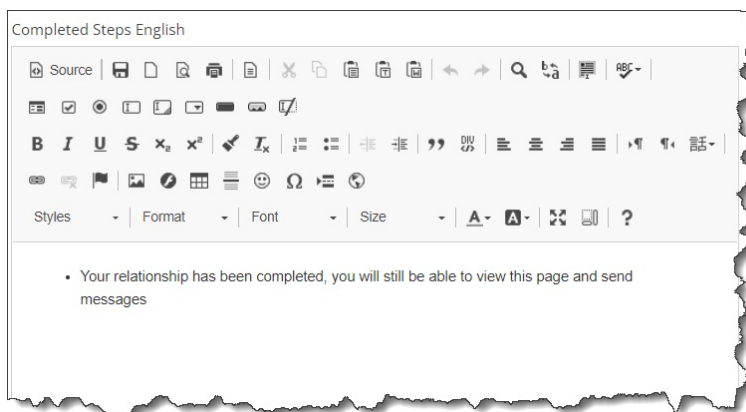
- **Invitation Sender Steps** - This provides instructions for your Mentors to take when they have sent a Relationship Invite to a potential Mentee.



- **Invitation Receiver Steps** - This provides instructions for your Mentors when they have received a Relationship Invite from a potential Mentee.



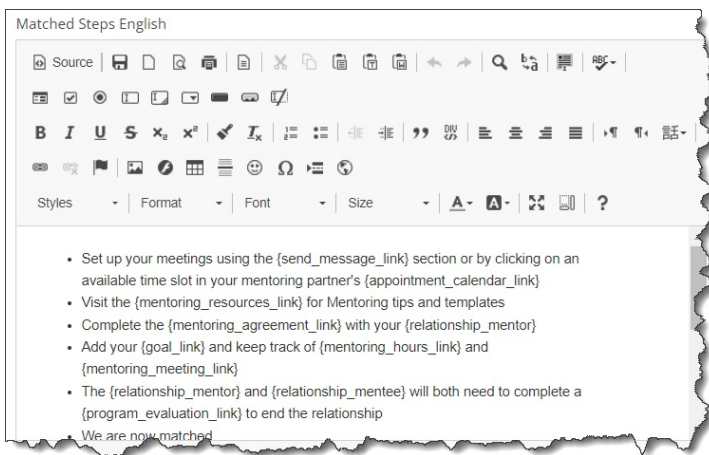
- **Matched Steps** - This provides guidelines to Mentors during the relationship.



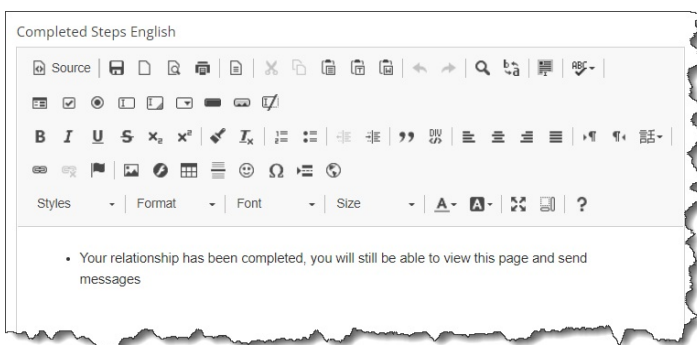
- **Completed Steps** - Displays text for when the relationship is completed.

Mentee Steps:



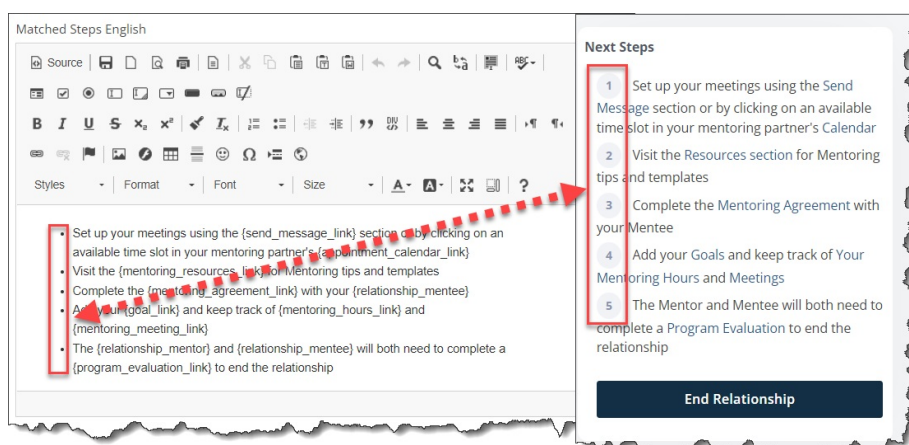


- **Matched Steps** - This provides guidelines to Mentees during the relationship.



- **Completed Steps** - Displays text for when the relationship is completed.

3.4 Each point form in the *Relationship Steps* section will create a step number on the relationship dashboard *Next Steps* section.



Tags

3.5 Just like in the System-generated Messages, MentorCity provided some tags for you to use in the steps settings.

i Dynamic tags offer a way to standardize your content by inserting information/links you already have on the platform into the steps.

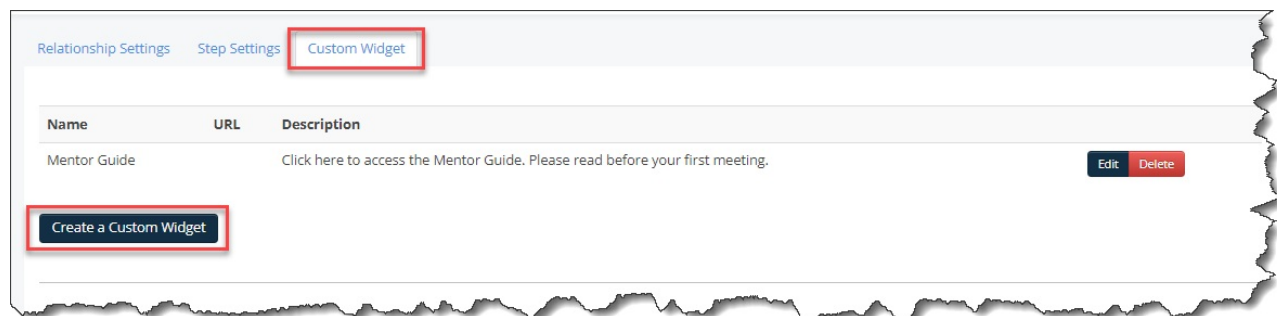


{send_message_link}	Provides a shortcut to the message Hub, to send a message to the Mentor/Mentee
{appointment_calendar_link}	Provides a shortcut to open the Meeting Scheduler
{mentoring_resources_link}	Provides a shortcut to the Resources section
{mentoring_agreement_link}	Provides a shortcut to the Mentoring Agreement
{goal_link}	Provides a shortcut to the Goals section
{program_evaluation_link}	Provides a shortcut to the Program Evaluation
{confirm_invitation_link}	Provides a link to view and confirm the Relationship invitation (not applicable for Admin Matching)

Custom Widget

4. You can add a custom widget to any of the row. Some examples of this would be a quick access button to a specific resource you want the mentoring partners to work through, or a website you want your members to interact with during a relationship.

4.1 To create a custom widget, click on the *Custom Widget* Tab and then click on [Create a Custom Widget](#).



4.2 Give the widget a name, URL, description and button text specification.

4.2.1 You can also enter a translation on the right fields if your program is bilingual.

<p>Name</p> <input type="text" value="Mentor Guide"/>	<p>French Name</p> <input type="text" value="Guide du Mentor"/>
<p>URL</p> <input type="text" value="https://ourmentorcityqa.mentorcity.com/fr/mentoring_resources/3186"/>	<p>French URL</p> <input type="text" value="https://ourmentorcityqa.mentorcity.com/fr/mentoring_resources/3186"/>
<p>Description English</p> <input type="text" value="Click here to access the Mentor Guide. Please read before your first meeting."/>	<p>Description French</p> <input type="text" value="Cliquez ici pour accéder au guide du mentor. Veuillez lire avant votre première rencontre."/>
<p>Button Text English</p> <input type="text" value="Mentor Guide"/>	<p>Button Text French</p> <input type="text" value="Guide du Mentor"/>
<p>Attachment</p> <input type="button" value="Choose File"/>	<p>Attachment French</p> <input type="button" value="Choose File"/>
<p>Upload an image with the following dimensions for better results: Width: 250 pixels / Height: 250 pixels</p> <input type="button" value="Save"/>	<p>Upload an image with the following dimensions for better results: Width: 250 pixels / Height: 250 pixels</p>

4.3 Optional: add an attachment to your widget by clicking on **Choose File**.

Attachment


Upload an image with the following dimensions for better results:
Width: 250 pixels / Height: 250 pixels

4.4 Click **Save**.


Attachment


Upload an image with the following dimensions for better results:
Width: 250 pixels / Height: 250 pixels



We can now see the custom widget on the relationship dashboard below that provides a link to a Mentor Guide.



Julie Smith

 Customer Care at Kylie Cosmetics

 Edmonton, Alberta, Canada

Your Mentoring Hours ?

-

01:15

Minutes

+

Number of Meetings ?


-

1

Meeting

+


Schedule Meetings ?





Upcoming 0 Meeting


View

New


 Notes

 Progress

 Goals

 Mentoring Agreement

Mentor Guide

 Program Evaluation

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

🔄Revision #51

★Created Mon, Oct 31, 2022 5:09 PM by Michèle Mantero

✎Updated Tue, Jul 4, 2023 9:56 PM by Michèle Mantero