

Platform User Guide

01

Overview

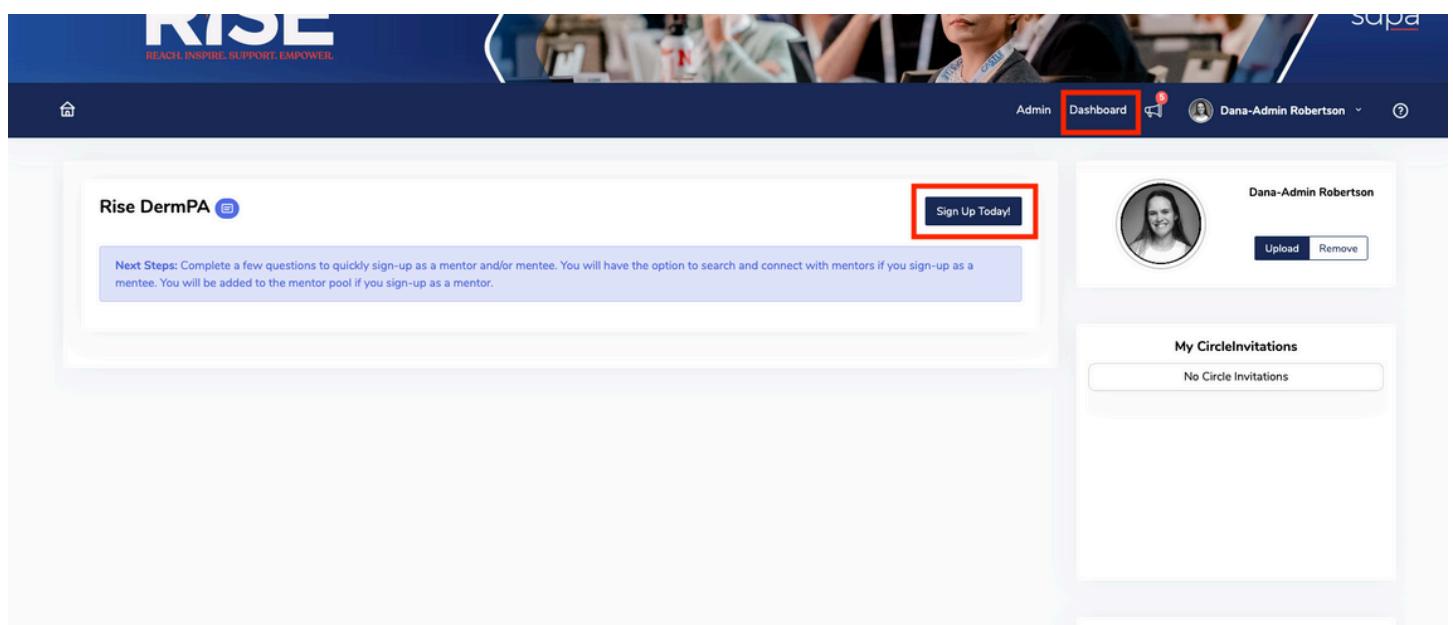
This guide outlines a few features of this platform. By utilizing this platform, you and your match can collaborate on goals and tasks, book meetings, send messages, and share files

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Procedure

Step 1: Getting Started

1. Click the **register** button on the right hand side.
2. Enter your information and click **submit**. Ensure you use an email address you regularly check.
3. Click **login**.
4. Once logged in, navigate to the **dashboard**. Click **Sign Up** to complete the program registration.



Step 2: Connecting with Others

1. Once you've completed the sign up, you'll be directed to **search and connect**.
2. Click into this button, and then you'll see the other participants who are available to connect.
3. View profiles by clicking the **view** icon beneath the profile images.
4. Click **Request Connection** to send an email request to other participants.

The screenshot shows a user interface for a networking platform. On the left, there is a list of profiles with their names, titles, and match scores. Each profile card has a 'View' icon (a person icon with a magnifying glass) and a 'Request Connection' button. The 'Request Connection' button for Alison Ens is highlighted with a red box. On the right, a detailed profile view for Alison Ens is displayed, including her photo, name, title, location, a 80% Match Score bar, and various profile details like timezone, gender, and signing up for.

Profile	Name	Title	Match Score
Alison Ens	Alison Ens	Head of Research	80% Match
Cassidy Johnson	Cassidy Johnson	Mechanical Draftsman	80% Match
Khalifa Salisu	Khalifa Salisu	Account Executive	80% Match
Jonathan Cooley	Jonathan Cooley	Full-stack Developer	80% Match
Keith Lee	Keith Lee	Director of Product Development	80% Match
Rachel Quinn	Rachel Quinn	President	80% Match

Profile Details for Alison Ens:

- Alison Ens, Mentor
- Head of Research | Acme Consulting | Los Angeles | California
- Request Connection (button)
- 80% Match Score
- General Information
 - Timezone: EST
 - What is your gender?: Female
 - What are you signing up for?: Mentor
 - First Name: Alison
 - Last Name: Ens

Step 3: Engaging

1. Once connected, navigate to the **Workspace** section.
2. Here you can schedule **meetings**, send **messages**, upload **files and links**, and **notify your match** of any updates.

ENGAGEMENT SUMMARY

Status: Thriving Status

Engagement End: Tuesday, July 31, 2029

Goals: 1 overdue, 1 Pending

Tasks: 3 overdue, 3 pending

Last Activity: Goal Removed January 05, 2026 10:32 AM

Next Meeting: 11/4/2026 9:45:00 AM

Upcoming Meetings

Add Meeting

Wednesday, November 4, 2026

Align on Mentorship 9:45:00 AM

MY CIRCLE

Peter Swart Primary Mentor danarobertson190@gmail.com

Dana Robertson Primary Mentor dana@rhythmq.com

Dylan Davidson Mentee dylan@rhythmq.com

Notify of Updates

Surveys Completed Surveys

Mentorship Kick-Off Survey Draft Due: 06-30-2029

Past Messages

Peter: Hi Dana, thanks so much for connecting! Looking forward to meeting soon. 4:33:00 PM

Dana: Hey Peter, Great to meet you! 4:33:00 PM

Send Message

ENGAGEMENT HISTORY

Show: 10 entries

Action Type Action Content Performed By Date Comments

Goal Removed Goal: 5 Year Research Goal Peter Swart January 05, 2026 10:32 AM Goal is removed by Peter Swart

Meeting Added Meeting: Test Meeting Peter Swart December 09, 2025 11:00 AM Meeting is added by Peter Swart

Meeting Added Meeting: Align on Mentorship Peter Swart November 04, 2025 10:02 AM Meeting is added by Dana Robertson

Meeting Added Meeting: test Peter Swart April 24, 2025 18:16 AM Meeting is added by Peter Swart

Email Notification Message Test Peter Swart December 18, 2024 18:17 AM Email Notification regarding changes on engagement Sent by Peter Swart to Dana Robertson

RESOURCES

Mentorship Resources

- Mentor FAQ
- Mentee FAQ

System Resources

- Outlook Integration Guide

FILES AND LINKS

Book Recommendations

Step 4: Connecting with Outlook

Home > Dashboard > Workspace

ENGAGEMENT WORKSPACE ACTIVE

You'll use this page to create and track Goals and Tasks, set Meetings, and message your Connection.

ENGAGEMENT SUMMARY

Status: Thriving Status

Engagement End: Tuesday, July 31, 2029

Goals: 1 overdue, 2 Pending

Tasks: 7 overdue, 7 pending

Last Activity: Meeting Added November 04, 2025 10:02 AM

Next Meeting: 11/4/2026 9:45:00 AM

Upcoming Meetings

Add Meeting

Wednesday, November 4, 2026

Align on Mentorship 9:45:00 AM

Past Meetings

MY CIRCLE

Peter Swart Primary Mentor danarobertson190@gmail.com

Dana Robertson Primary Mentor dana@rhythmq.com

Dylan Davidson Mentee dylan@rhythmq.com

Notify of Updates

Surveys Completed Surveys

Mentorship Kick-Off Survey Draft Due: 06-30-2029

Past Messages

Help

ENGAGEMENT HISTORY

Action Type Action Content Performed By Date Comments

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FILES AND LINKS

Book Recommendations

- Click the icon in the upper right side of the meetings widget.
- Follow the directions to integrate with your Outlook calendar.

If you don't integrate with Outlook, the **Teams link toggle** will not be available. You will need to manually upload a Zoom, Google Meet, or similar meeting link in the **Location** field when scheduling.

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Notes & Considerations

- Ensure you have the necessary permissions to authorize Outlook integration.
- If you encounter any issues, contact your administrator or support for assistance.
- Keeping your calendar up to date will help ensure availability accuracy when scheduling meetings.

Thank you!

