

Platform User Guide

01

Overview

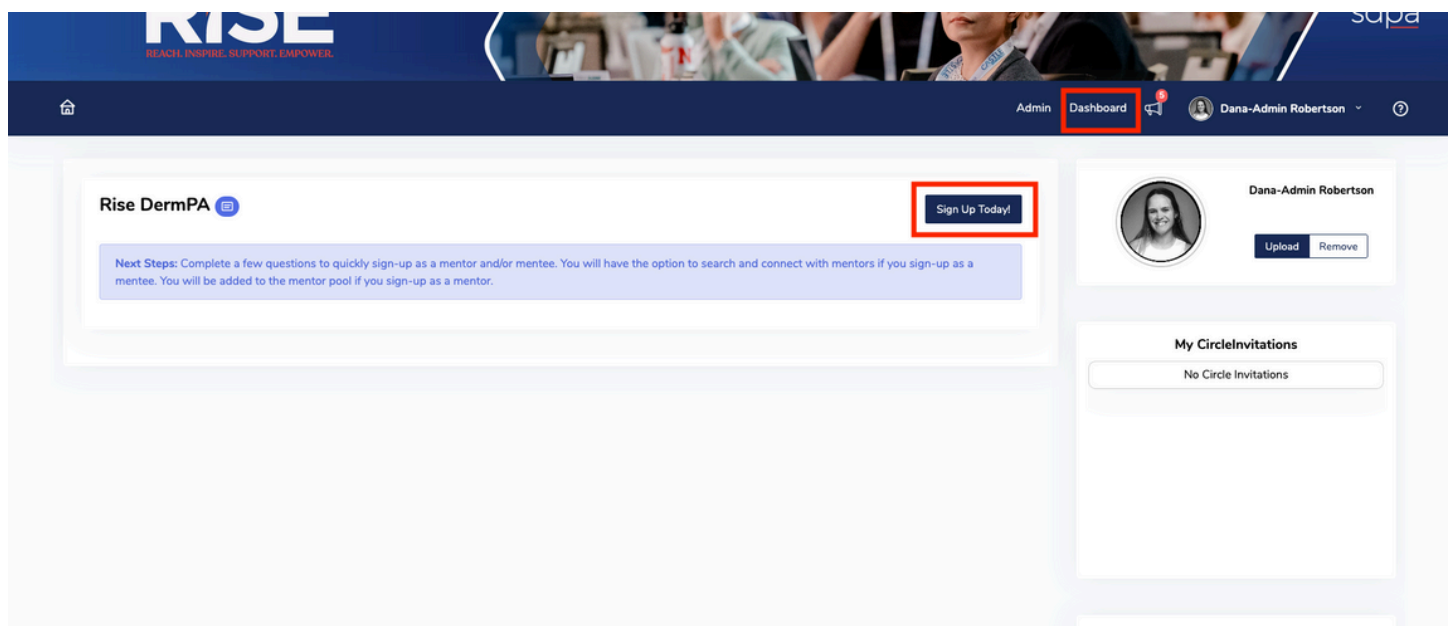
This guide outlines a few features of this platform. By utilizing this platform, you and your match can collaborate on goals and tasks, book meetings, send messages, and share files

02

Procedure

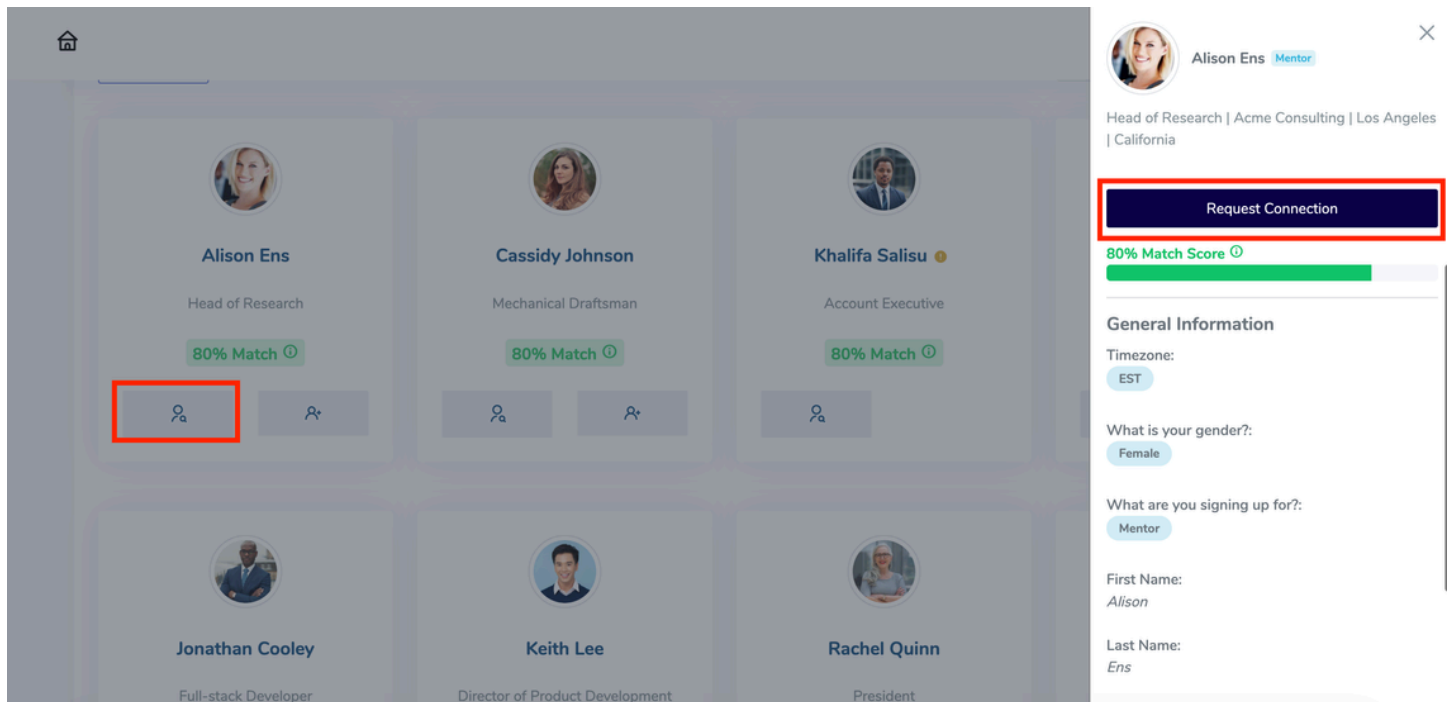
Step 1: Getting Started

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.



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.

The screenshot shows the Engagement Workspace dashboard for Peter Swart. The 'Upcoming Meetings' section is highlighted with a red box, showing a meeting for Wednesday, November 4, 2026. The 'My Circle' section is also highlighted with a red box, showing a list of contacts and a 'Notify of Updates' button. The 'Past Messages' section is highlighted with a red box, showing a message from Peter to Dana. The 'Goals and Tasks' section is highlighted with a red box, showing a table of tasks for the 'Kickoff Mentorship' goal.

Step 4: Connecting with Outlook

The screenshot shows the Engagement Workspace dashboard for Peter Swart. The 'Upcoming Meetings' section is highlighted with a red box, showing a meeting for Wednesday, November 4, 2026. The 'Add Meeting' button is highlighted with a red box, indicating the next step in the process.

- 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.

- 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!

