# Job Aid:

# Mentor Functionality OPCM Administrator Guide



August 2014

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## **Section 1: Overview**

#### **Basic Mentor Functionality**

New functionality has been added to the OnPoint system that allows Administrators to assign a Manager as a "mentor" to one or more users in the system. Once a Manager has had a user(s) assigned to him/her to mentor, the Manager can view dashboard reporting information and run standard reports for any assigned mentees via OnPoint's Performance Manager module. On the dashboard, Managers use "Select Group" and choose "**Mentored Users**" from the dropdown. This changes the charts to include only mentored users for that Manager.

**Note:** While any Manager may mentor multiple users, each user can only have one mentor.

### **Assigning Mentored Users**

Administrators can assign one or more mentored users to any Performance Manager in OPCM (Reporting- or Grouplevel).

1. Under the Users & Groups: Users, filter the list for Managers, and then select the desired Manager.

D USER	S & GROUPS: USER	S							
Add	📲 User Wizerd 🖉 🕷	Iobile User Wizard	Last Name: A	BCDEFGHI	KLMNDPQR	5 7 U V W X Y Z 🕅	Show: Users	Managers Recor	ds Go
Filter	Last Name:	Org	anization:		Login ID:		Apply Clear	1	
1D	User Name (click to sele	ect)	User Loga	Title		Organization	1	Role	Status
00016	Brown, Charlie	n, Charlie dorown OnPoint Ever		OnPoint Event	t Instructor	OnPoint		Group Manager	Active
00287	Cobb, Bob		bcobb	Maestro		OnPoint Digit	al, Inc.	Group Manager	Active
00263	Harris, Paige 🗲 💳		phanris	Marketing Mar	nager	OnPoint LMS		Group Manager	Active
90259	palmer, mike		mpaimer	test	OnPoint			Site Administrator	Active
a birth of									

2. Select the Management subtab for the Manager you selected.

USERS & GROUPS: USER				1					
User Information Assignment	s Memberships	Test Scores	Management	History	Notes	Performance	Mobile Profile	E-Commerce	Certifications
Name: Harris, Paige		÷,	K	1					
Group Management	Assign			~					
OnPoint Staff Sales Reps				2					
C Mentored Users	Assign	-							
0 user(s)									

3. Adjacent to the **Mentored Users** heading, select the <u>Assign</u> link and assign any user(s) to that Manager that he/she will mentor. Click the Finished button to return to the Management sub tab for the Manager.

### Viewing a User's Mentor

Administrators can see who a user's mentor is by selecting the memberships tab for any user. If the user has been assigned a mentor, that name will display at the bottom of the list under "Mentor".

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USERS & GROUPS: USER					
User Information	Memberships				
Name: Harris, Paige					
S Group Membership Ass					
OnPoint Testers Sales Team The Testing Group V1729 The Quantum of Mobile Learning WES Demo Group Click a group name to set or clear it as the user's primary group					
🕮 Job Code Assignme	ents	Assign			
Click a job code to set or clear it as the user's primary job code					
E Location Assignment	Assign				
Mentor bonnie boyette					