Group Matching

Last Modified on 02/11/2022 10:24 am EST

STEP 1

From Qooper Admin Dashboard, select Groups. Click "create" to create a new group. The image we've used for groups is White HBA logo purple background no text.jpg 🗞

	Create Group		×
Groups 📴 Create	Name*		
	Name		
	Header Image*		
FB/	Drag & Files should have 320	t Drop your file or <u>Browse</u> Dx200 ratio for better look and quaility	
/	Mentee Limit	Mentor Limit	
Regional Network	0	0	וס
Created Yesterday	Description*		1
MENTORING	Normal 🗘 B I U 🗄 🗄 🗞 🔺	X Ix	R
VIEW	Type here		

STEP 2

From Qooper Admin Dashboard, select matching

仚	Program	<u>ns</u>	
£ì	Materials		
822g	Matching	JW IN PROFILES	
۵	Groups	<u>stion</u> : Profile Image : None	
Å	Learning		Made with Tango.us

STEP 3

Click Bulk Suggest

	ൿ Bulk Su	ggest	20 Bulk	Unmatch
Export				

STEP 4

Select "group" and which member role you're matching (mentee or mentor)



STEP 5

Select group in which you'd like to match from the Group drop-down

	O 1:1 Scroup		
Participants 🗐 Imp	Suggests members to the selected group.		
d Dinmatched	Member Role*		
_	Mentee Mentor		
	Ignore matching algorithm		
	U When checked, all users in the selected role will be displayed.		
	Group*		
	Select a Group		~
	Exclude participants in following group(s)		
	Select group(s)		
	Min match rate %*		
	30		
	Group bulk suggest requires multiple selection or single choice questions	to be included in the algorithm.	
	Question	Options Actions	Made with Tango.us

STEP 6

Select previously matched groups to exclude those that have already been placed within a group; this is a multi-select field

Participants 💮 Imp	Suggests members to the selected group.				
O Unmatched	Member Role*				
_	Mentee Mentor				
	Ignore matching algorithm			_	
	When checked, all users in the selected role will be displa	iyed.		_	
	Group*				
	Mentoring Circle 3			~	
	Exclude participants in following group(s)				
	select group(s)				
	Regional Network				
	Mentoring Circle 2				
	Mentoring Circle 1				
	Mentor Network				
	Mentee Network				
	What is your gender?		/ Edit O Reset	Made wit	h Tango.us

STEP 7

Set minimum match rate %

Participants 😥 Imp	Ignore matching algorithm			
d Outmatched	When checked, all users in the selected role will be displayed.			
	Group*			
	Mentoring Circle 3			
	Exclude participants in following group(s)			
	Mentoring Circle 1 × Mentoring Circle 2 × ×			
	Min match rate %*			
	zd		۵	
	Group bulk suggest requires multiple selection or single choice quest	ions to be included in the algorithm.		
	Question	Options	Actions	
	What is your gender?	. 10	/ Edit	
	What are your preferred pronouns?	0.00	🖉 Edit 🕞 Reset	
			Made	with Tango.us

STEP 8

Edit answers on which you'd like to match

o be included	in the algorithm.		
	Options	Actions	
		🖉 Edit 🕞 Reset	
		🖉 Edit 🕞 Reset	
		🖉 Edit 📿 Reset	Made with Tango.us

Mentoring Circle 1 × 1	Mentoring Circle 2 ×	×
Min match rate %*	Edit	×
26	Select the options to compare with participants answers*	
Group bulk suggest requ	[select Option(s)	
Question	Select All	
What is your gender	Choose not to disclose	C Reset
What are your preferred	Female Male	Reset
What are your goals or a	Non-binary	: C Reset
Which professional areas	s would you like to learn about? -	🖉 Edit 🕒 Reset
		Made with Tang

STEP 9

Click on Proceed to see bulk suggestions

-	C Edit C Reset	
-	C Edit C Reset	
	Proceed Close	
		Made with Tango.us

STEP 10

Select "details" to see applicant's survey responses, confirm to add to group, or skip to skip the suggestion.

Note: once confirmed, the participant will be notified via email

Confirm S	Suggestions			×
	Confirm All (2)			
	EACH PARTICIPANT WILL BE NOTIFIED UPON CONFIR	MATION.		
SUGGEST	ED V			
	Michelle Newsome Manager at Self employed Mentee	Details	100% Match Rate	Skip
	Michelle Morse Manager at HBA Mentee	Details	100% Match Rate	Skip
				Close

To match manually, from Groups on Admin Dashboard, click the three dots in the upper right corner of the group you'd like to match to and select add mentee or mentor

