

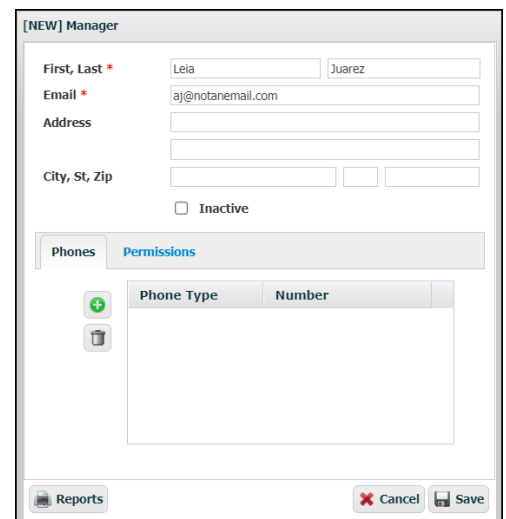


# Add a Manager (and a User Group)

## Step 2: Adding a Manager

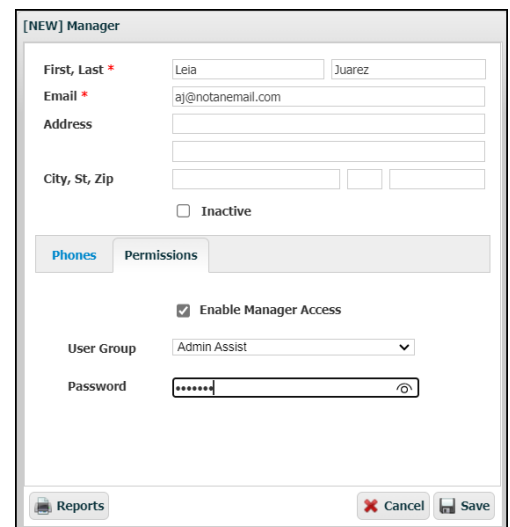
Once a User Group is created, add one or more Managers to the system and assign them to the new User Group. This grants the Manager access to RegWerks.

- ◆ Go to **Manager** in the Main Menu.
- ◆ Click the **Add Record** button in the upper left corner, and the **NEW Manager** window will open.
- ◆ Add in the Manager's name and email.



The screenshot shows the "[NEW] Manager" form with the "Permissions" tab selected. The form contains the following fields: "First, Last" (Leila Juarez), "Email" (aj@notanemail.com), "Address" (empty), "City, St, Zip" (empty), and an "Inactive" checkbox (unchecked). Below the form is a table with columns "Phone Type" and "Number", and a "Reports" button at the bottom left. "Cancel" and "Save" buttons are at the bottom right.

- ◆ Go to the **Permissions** tab.
- ◆ Check **Enable Manager Access**.
- ◆ Assign to the appropriate **User Group**.
- ◆ Create a **Password** for the Manager, then **Save**.
- ◆ When logging into RegWerks, a Manager's User Name is the Manager's email address.



The screenshot shows the "[NEW] Manager" form with the "Permissions" tab selected. The form contains the following fields: "First, Last" (Leila Juarez), "Email" (aj@notanemail.com), "Address" (empty), "City, St, Zip" (empty), and an "Inactive" checkbox (unchecked). Below the form is a table with columns "Phone Type" and "Number", and a "Reports" button at the bottom left. "Cancel" and "Save" buttons are at the bottom right. The "Permissions" section is expanded, showing a checked "Enable Manager Access" checkbox, a "User Group" dropdown menu (Admin Assist), and a "Password" field with a masked password and a show/hide icon.

# Add a Manager (and a User Group)

## Step 3: Assign the Manager to the Class

When assigning the **Manager** to a **Class**, first navigate to the individual Class. Select the person's name from the **Manager** drop down menu, then click **Save**.

[437053] Class

Class Number	2024 Field Trip to Amusement Park	Status	Active
Program	Field Trips	Enrolled	0
Course	Elementary Field Trips	Waitlist	0
Conf. Email			

General   **Instructor & Expenses**   Schedule   Arrangements   Registration   Waitlist   Receipt   Invoice

Account Code	Academic Summer School	<input checked="" type="checkbox"/> Show On Web
Manager	Juarez, Leia	<input checked="" type="checkbox"/> Allow Waitlist Registrations
Publish Date	07/31/2023	<input type="checkbox"/> Show On Year End Statement
Remove Date	07/28/2024	<input type="checkbox"/> Allow Partial Past Due Payments
Reg. Begins		
Reg. Ends		
Publish Time	12:00 AM	
Remove Time	12:00 AM	
Begins Time	12:00 AM	
Ends Time	12:00 AM	