



# Class Creation Quick Start Guide

This guide is designed to assist users in creating Classes from start to finish. While clients who are new to RegWerks will follow these instructions fairly closely, existing users who simply wish to create a new Class in an existing Course may pick and choose elements of this guide to create new classes.

New users begin the initial set-up of Classes by first organizing all Courses and Classes. This includes establishing Program, Category, and Course, along with creating other elements to define each class, as noted below. The overall goal of the set-up process is to provide a customized structure to satisfy the registration and reporting needs of the organization.

## Create an Account Code

[NEW] Account Code	
Short Code *	8028
Full Code *	202008028
Description	Community Education

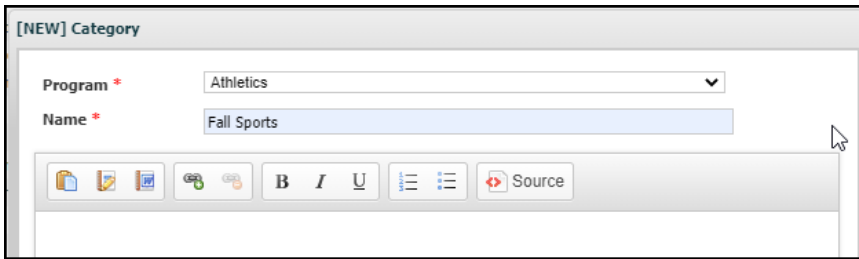
1. From the **Setup** menu, click on the **Account Code** menu option.
2. Click the **Add Record** button at the top of the window, and a new **Account Code** window will open.
3. Enter the name of your budgeting account code.
4. Click **Save**.

## Create a Program

[NEW] Program	
Name *	Before/After Care
Reply To	admin@fauxemail.com
Question Profile	-- Select One --
Days Before Re-Answer	180
Invoice Logo	<input type="text"/>
	<small>Recommended Logo Size 300x180</small>
	<input checked="" type="checkbox"/> Display Federal Tax ID

1. From the **Setup** menu, click the **Program** menu option.
2. Click the **Add Record** button in the toolbar, and a new **Program** window will open.
3. Give the Program a name. In the **Reply To** field, add the email address of the person who is responsible for managing this Program's registrations.
4. For a childcare **Program**, consider checking **Display Federal Tax ID** for reporting purposes. Click **Save**.

## Create a Category



[NEW] Category

Program \* Athletics

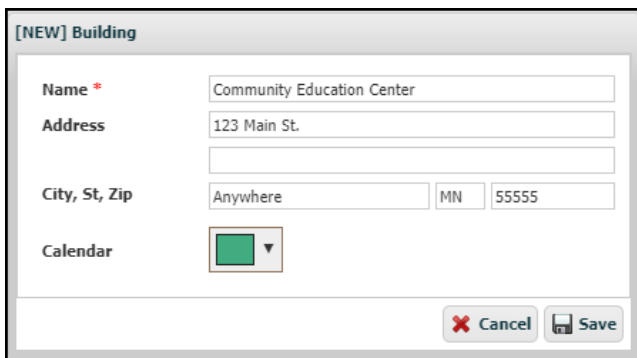
Name \* Fall Sports

Source

open.

1. From the **Setup** menu, select the **Category** menu option.
2. Click the **Add Record** button, and a new **Category** window will
3. Select the Category's Program from selections in the **Program** drop-down menu.
4. Enter the Category's name.
5. Click **Save**.
  - When creating a category for the first time, remember to give yourself access to the new category in your user profile. To do this, click on the **User** menu option under **Setup**.
  - Access your user profile by double-clicking on your name, and then select the **Categories** tab.
  - Locate the new Category and check the corresponding box before clicking **Save**. When creating new Categories, remember to grant user permissions to other Users, as well.

## Create a Building (Optional)



[NEW] Building

Name \* Community Education Center

Address 123 Main St.

City, St, Zip Anywhere MN 55555

Calendar

Cancel Save

1. From the **Main** menu, click the **Building** menu option.
2. Click the **Add Record** button.
3. Enter the Building's name and address, then assign it a Calendar color. Click **Save**.

## Add a Manager

[NEW] Manager

First, Last \* Maryan Ali

Email \* m.ali@fauxemail.com

Address 222 South St.

City, St, Zip Bloomington MN 55122

Inactive

1. On the **Main** menu, open the **Manager** menu option.
2. Select the **Add Record** button.
3. Enter the name and email address of the person who will receive customer questions from your Web Store.
4. Click **Save**.

## Create an Instructor (Optional)

[NEW] Instructor

Prefix, First, Last, Suffix \* Marisella Lopez

Email \* m.lopez@fauxemail.com

Address 6 Park Place

City, St, Zip Bloomington MN 55431

Inactive

1. On the **Main** menu, select the **Instructor** menu option.
2. Click the **Add Record** button in the toolbar, and a new **Instructor** window will open.
3. Enter the instructor's name and contact information.
4. Click **Save**.

## Create a Course

[NEW] Course

Title   Inactive

Program

General Arrangements Web Classes Questions Expenses Email

Account Code

Manager

Category

Topic  Topic 2

Go Limit  Reg. Limit

Price

1. From the **Main** menu, click on the **Course** menu option.
2. Click the **Add Record** button.
3. Enter the title of the course in the **Title** field.
4. Designate the Course's Program from options in the **Program** drop-down menu.
5. On the **General** tab, select the **Account Code**, **Manager**, and **Category** from their corresponding drop-down menus.
6. In **Go Limit**, define the minimum number of registrations required for this class to take place.
7. In **Reg Limit**, establish class size parameters by setting the maximum number of registrations allowed for this class.
8. On the **Web** tab in **Website Title**, enter the class title as it will appear publicly in your Web Store.

General Arrangements Web Classes Questions Expenses Email

Website Title

Password

9. Click **Save**.

## Create a Class

1. On the **Main** menu, select the **Course** menu option.
2. Double-click into the course that was just created.

3. Click the **Add Class** button in the bottom left corner of the window.
4. When asked if you would like to create a new class, click **OK**.

The screenshot shows a software window titled "[349530] Class". At the top, there are input fields for "Class Number" (containing "FY21-HSA1"), "Program" (containing "Athletics"), "Course" (containing "High School Baseball"), and "Conf. Email". To the right, there is a "Status" dropdown menu set to "Active", and two numeric input fields for "Enrolled" and "Waitlist", both set to "0". Below these fields is a horizontal tab bar with the following tabs: "General" (selected), "Instructor & Expenses", "Schedule", "Arrangements", "Registration", "Waitlist", "Receipt", and "Invoice". The "General" tab is active and contains several sections of fields. The first section includes "Account Code" (Athletics), "Manager" (Lamb, Matthew), and a "Show On Web" checkbox which is checked. The second section includes "Publish Date" (09/09/2020), "Remove Date" (01/29/2021), "Reg. Begins", and "Reg. Ends", each with a date picker icon and a time field set to "12:00 AM". The third section includes "Standard Pricing" (selected) and "Contract Pricing" (unselected) radio buttons. The fourth section includes "Price" (\$100.00), "Price Change", "New Price" (\$0.00), "Go Limit" (0), and "Reg. Limit" (40). At the bottom of the window, there are buttons for "Reports", "Cancel", and "Save".

5. Enter a unique class number in the **Class Number** field, making sure this number is used only once.
6. In **Conf email**, enter the email address of the person (or people) responsible for monitoring that class' registrations.
7. On the **General** tab:
  - In **Publish Date**, enter the date on which the class will first appear publicly on the Web Store.
  - In **Remove Date**, enter the date on which the class will be removed from the Web Store.
  - Define when people may register for this class by completing dates and times in **Reg Begins** and **Reg Ends** fields.
  - Enter the price of the class in the **Price** field.
  - Click **Show on Web** to automatically display the class publicly once Publish Date occurs.
  - For childcare classes, select **Show on Year End Statement** to allow year end reporting.

8. On the **Schedule** tab, select the days of the week on which the class takes place. Click the green button to the left of the Schedule tab.

The screenshot shows the 'Schedule' tab of a class management interface. At the top, the class details are: Class Number (FY21-HSA1), Program (Athletics), Course (High School Baseball), and Conf. Email (coach@fauxemail.com). The Status is set to 'Active'. Below this, there are tabs for General, Instructor & Expenses, Schedule (selected), Arrangements, Registration, Waitlist, Receipt, and Invoice. Under the Schedule tab, there are radio buttons for 'Use Facility Reservation' (Yes/No), a 'Group' dropdown menu, and checkboxes for days of the week (Monday, Tuesday, Wednesday, Thursday are checked). At the bottom, there is a table with columns for Start Dt., End Dt., Start Tm., End Tm., and Space. A green plus button is located to the left of the table.

- The **NEW Event** window will open.

The screenshot shows the 'NEW Event' form. It includes a 'Building' dropdown menu set to 'Community Center'. Below this is the text 'And/Or' in red. There is an 'Other Location' text input field. The 'Start Date' is set to 09/14/2020 and the 'End Date' is set to 12/18/2020. The 'Start Time' is set to 3:00 PM and the 'End Time' is set to 5:00 PM. At the bottom right, there are 'Cancel' and 'Save' buttons. The 'Cancel' button is highlighted with a red dashed border.

- Select the building in which the class takes place from the **Building** drop-down menu.
- Enter **Start and End Date**. If the times remain set at 12:00 AM, the system will not display any times on the Web Store.
- Click **Save**.

9. In the **Schedule** tab, add a *brief* text description of important class information in **Schedule Description**. Information in the **Schedule Description** automatically prints on customers' receipts upon completing registration in the Web Store.

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

Use Facility Reservation  Yes  No

Group -- Select One --

Sunday  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday

Start Dt.	End Dt.	Start Tm.	End Tm.	Space
10/5/2020	6/30/2021	2:00 PM	5:00 PM	Lindbergh High School:

Schedule Description

Rich text editor toolbar: Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Source

10. This successfully completes the class creation process.