

# Adding Managers

1

Welcome to this tutorial! In this video, I'll show you how to invite a Manager to your organization in Impact Evaluator.

The screenshot shows the Impact Evaluator dashboard for a demo account. The user profile for 'Demo Owner' is visible, along with statistics for Managers, Coordinators, Participants, Groups, and Programs. A search bar and filters are present at the bottom.

Category	Count
Total Managers	0
Total Coordinators	1
Total Participants	11
Total Groups	1
Number of Programs	3

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2

A Manager typically oversees groups and coordinators, and they have the ability to invite coordinators to the groups and programs they manage.

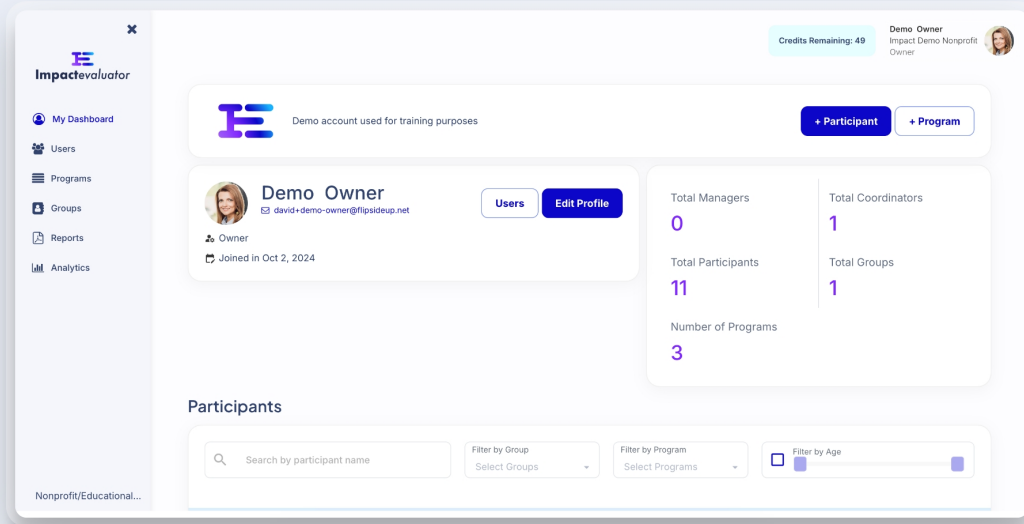
This screenshot is identical to the one above, showing the Impact Evaluator dashboard for the 'Demo Owner' user. It displays the user profile, statistics for Managers, Coordinators, Participants, Groups, and Programs, and a search bar with filters.

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If you'd like to learn more about user permissions, you can watch our "User permissions" video tutorial to understand the user roles better.

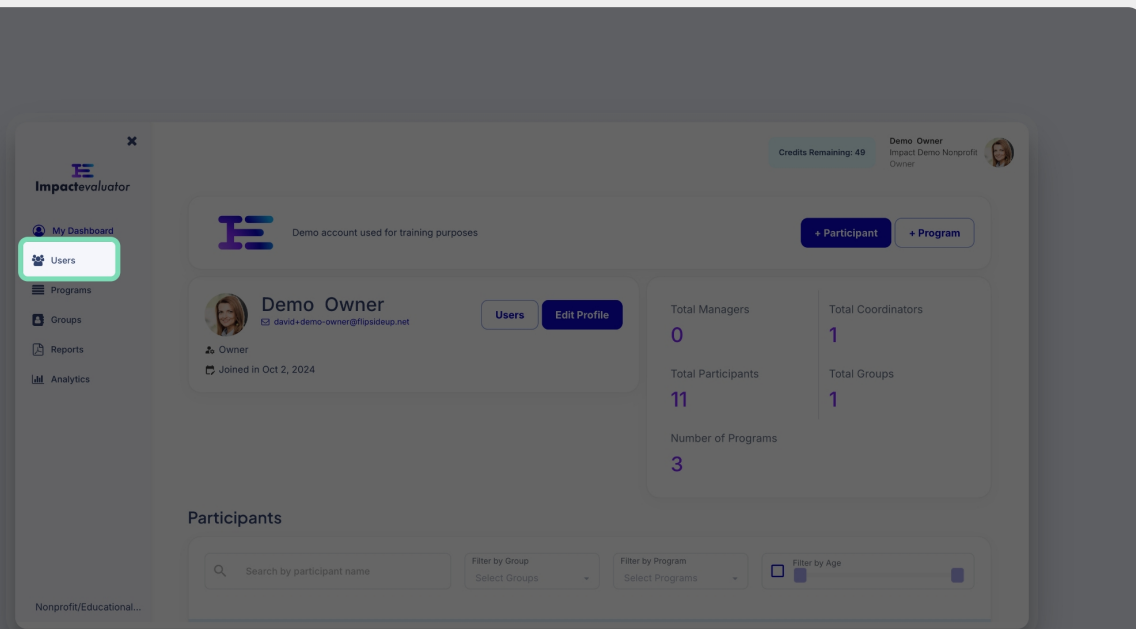


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4

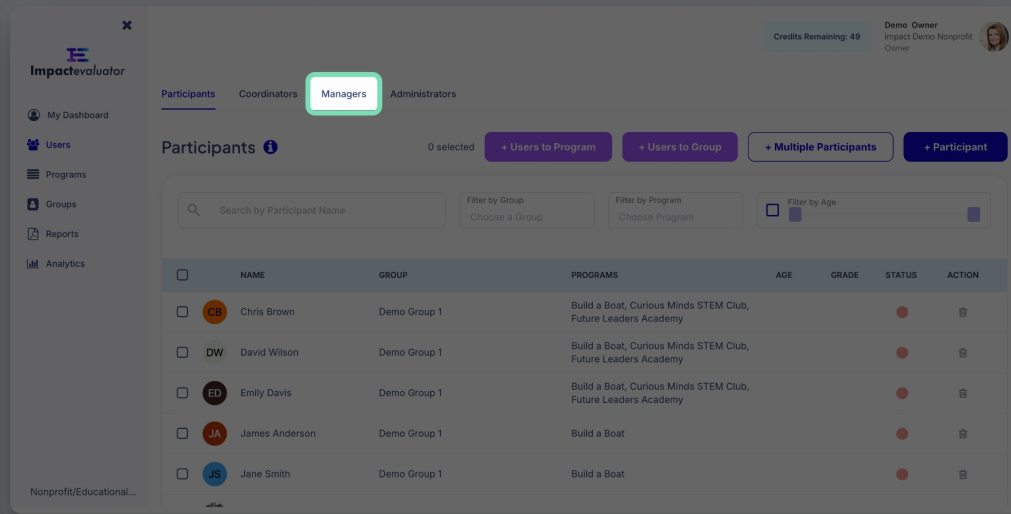
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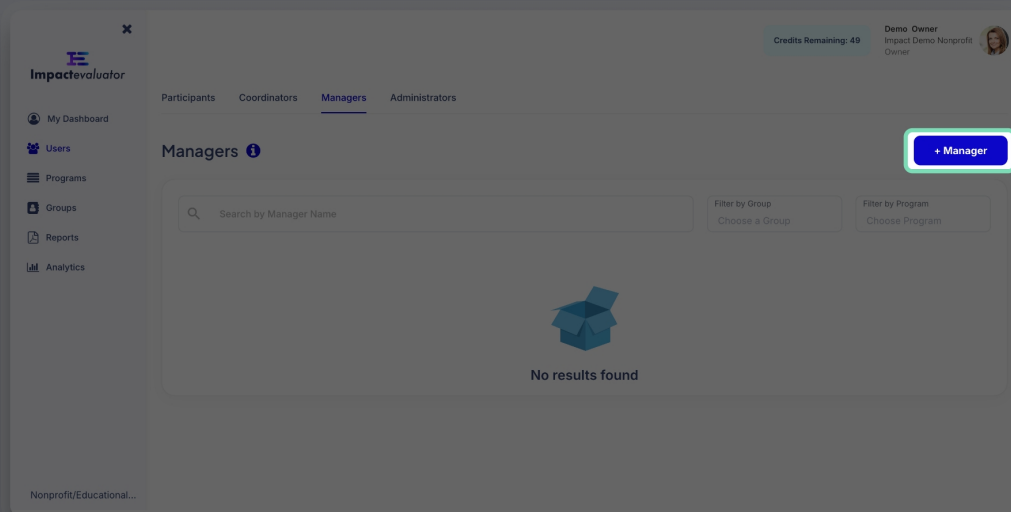


5 Then navigate to the 'Managers' tab.



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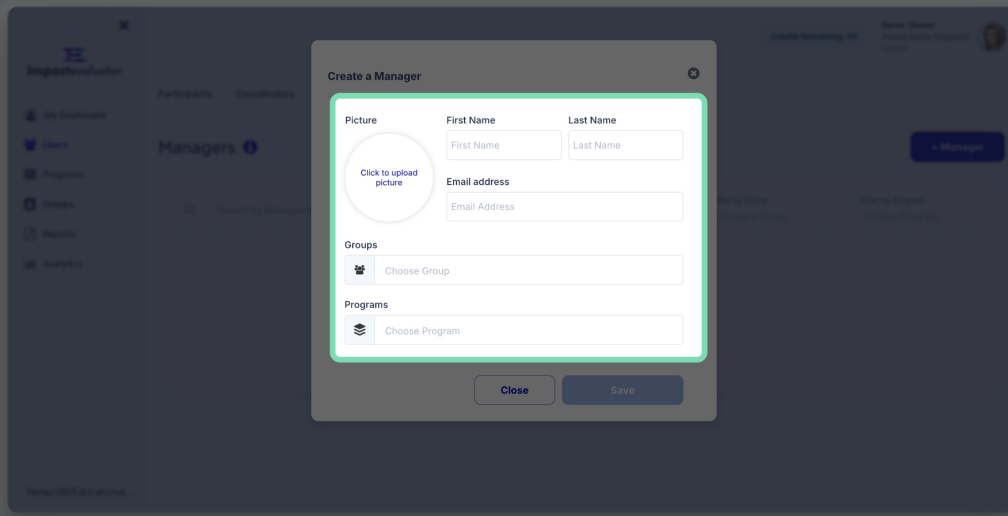
6 Once you're in the 'Managers' tab, click the '+Managers' button to open the popup form where you'll enter the manager's details.



Once you're in the 'Managers' tab, click the '+Managers' button to open the popup form where you'll enter the manager's details.

7

In the popup, fill in the Manager's details, including their names, email, and the specific groups and programs they will be managing.



The screenshot shows a 'Create a Manager' popup form. The form has the following fields:

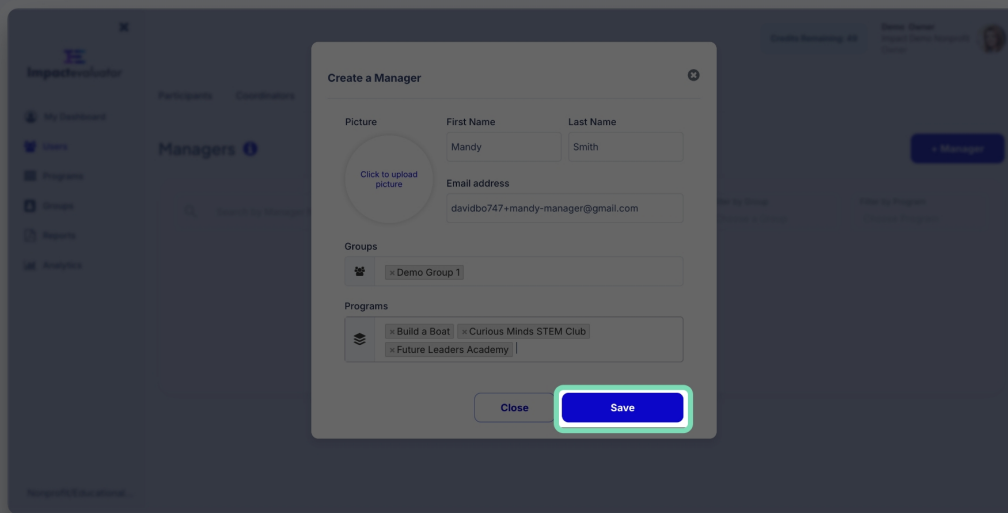
- Picture:** A circular placeholder with the text 'Click to upload picture'.
- First Name:** An input field with the placeholder text 'First Name'.
- Last Name:** An input field with the placeholder text 'Last Name'.
- Email address:** An input field with the placeholder text 'Email Address'.
- Groups:** A dropdown menu with the placeholder text 'Choose Group'.
- Programs:** A dropdown menu with the placeholder text 'Choose Program'.

At the bottom of the popup are two buttons: 'Close' and 'Save'.

In the popup, fill in the Manager's details, including their names, email, and the specific groups and programs they will be managing.

8

Once all the details are entered, click 'Save'



The screenshot shows the 'Create a Manager' popup form with the following details entered:

- Picture:** A circular placeholder with the text 'Click to upload picture'.
- First Name:** 'Mandy'
- Last Name:** 'Smith'
- Email address:** 'davidbo747+mandy-manager@gmail.com'
- Groups:** 'Demo Group 1' (with a close icon)
- Programs:** 'Build a Boat', 'Curious Minds STEM Club', and 'Future Leaders Academy' (each with a close icon)

At the bottom of the popup are two buttons: 'Close' and 'Save'. The 'Save' button is highlighted with a green border.

Once all the details are entered, click 'Save'

9

After saving, the invited Manager will appear in the list. They will receive an email invitation.

The screenshot shows the 'Managers' page in the Impactevaluator interface. The page includes a sidebar with navigation options like 'My Dashboard', 'Users', 'Programs', 'Groups', 'Reports', and 'Analytics'. The main content area is titled 'Managers' and features a search bar, filter options for 'Group' and 'Program', and a table of managers. The table has columns for 'NAME', 'GROUP', 'PROGRAMS', '# PARTICIPANTS', 'STATUS', and 'ACTION'. A single manager is listed: 'MS Mandy Smith' in 'Demo Group 1', associated with 'Build a Boat, Curious Minds STEM Club, Future Leaders Academy', having 11 participants, and a status of 'Invited' (represented by an orange dot). A '+ Manager' button is visible in the top right.

NAME	GROUP	PROGRAMS	# PARTICIPANTS	STATUS	ACTION
MS Mandy Smith	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	11	Invited (Orange Dot)	[Trash Icon]

After saving, the invited Manager will appear in the list. They will receive an email invitation.

10

Once they register and confirm their account from the email, their status will change from orange to green, indicating they are active.

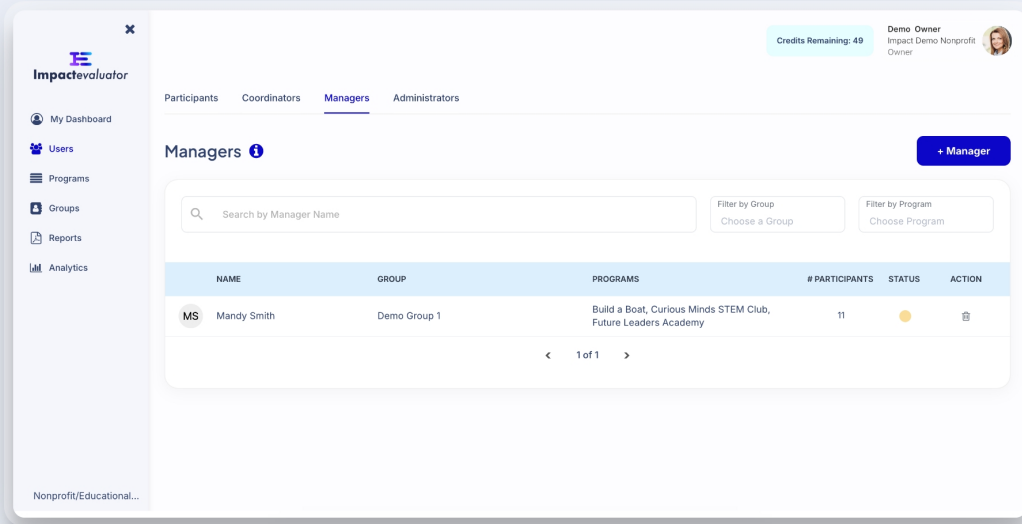
This screenshot is identical to the previous one, but the status of the manager 'MS Mandy Smith' has changed from 'Invited' (orange dot) to 'Active' (green dot). The rest of the interface, including the sidebar, search filters, and table structure, remains the same.

NAME	GROUP	PROGRAMS	# PARTICIPANTS	STATUS	ACTION
MS Mandy Smith	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	11	Active (Green Dot)	[Trash Icon]

Once they register and confirm their account from the email, their status will change from orange to green, indicating they are active.

11

That's how you invite a Manager to Impact Evaluator. They will now be able to manage their assigned groups and coordinators. Thanks for watching!



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