

Creating Registration Workflows - Events and Classes

Registrations for Events and Classes require workflows to be in place, here's how you set them up

18 Steps [View most recent version](#) 

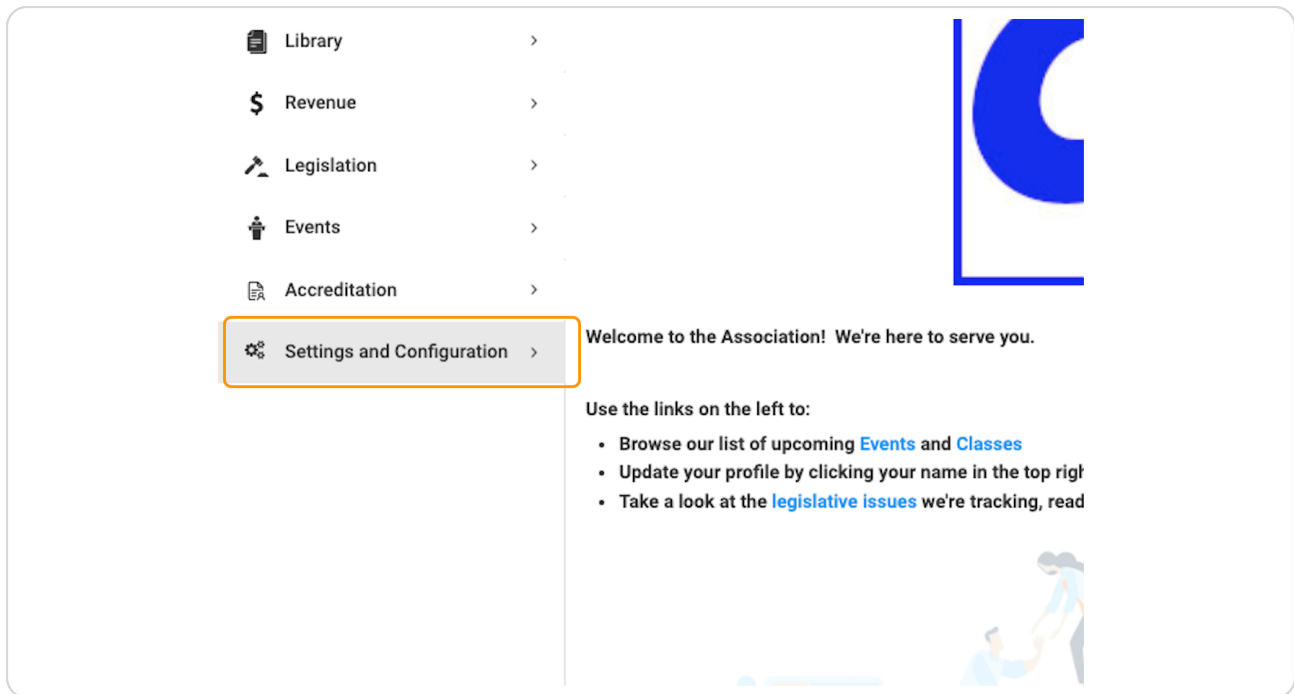
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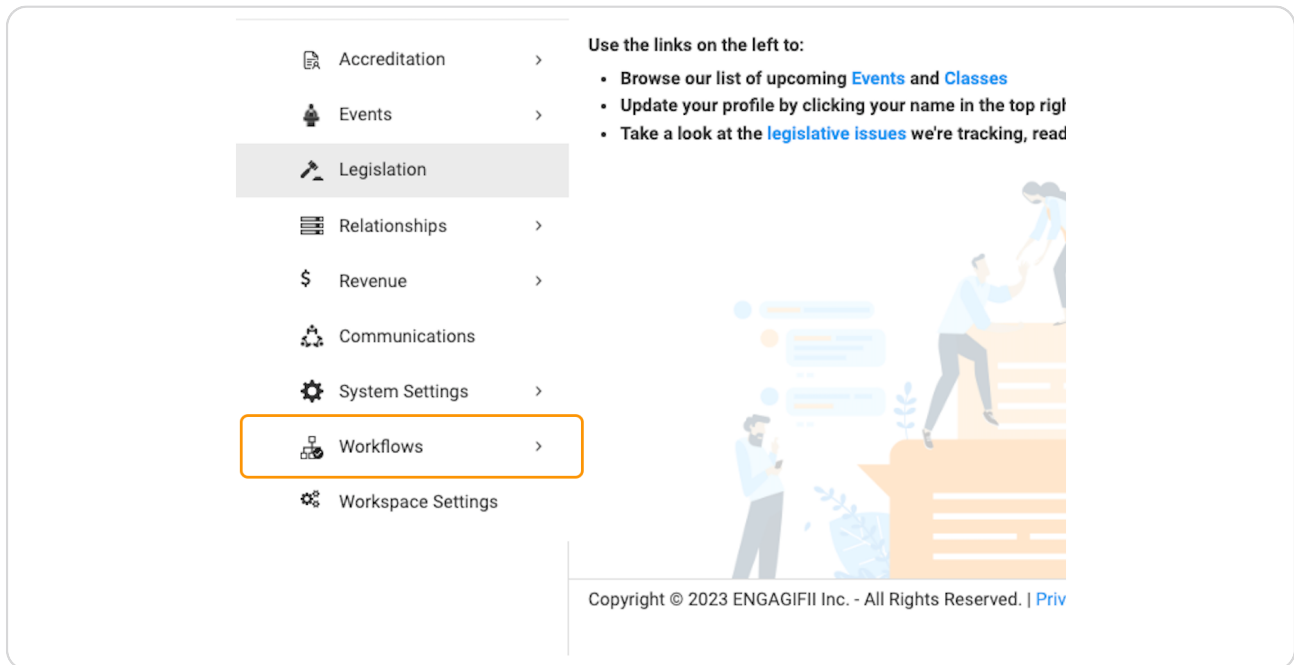
STEP 1

Click on Settings and Configuration



STEP 2

Click on Workflows



The screenshot shows a vertical navigation menu on the left side of a dashboard. The menu items are: Accreditation, Events, Legislation, Relationships, Revenue, Communications, System Settings, Workflows, and Workspace Settings. The 'Workflows' item is highlighted with an orange border. To the right of the menu, there is a list of instructions under the heading 'Use the links on the left to:'. Below the instructions is an illustration of three people in a collaborative work environment.

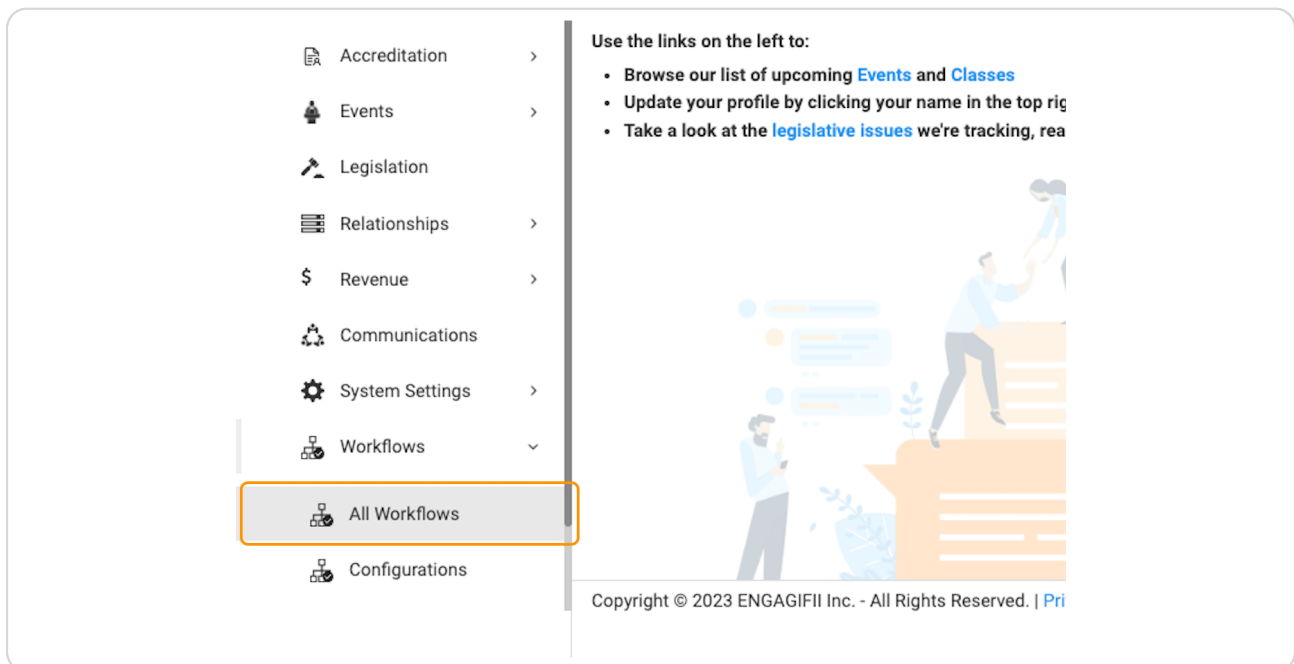
Use the links on the left to:

- Browse our list of upcoming [Events](#) and [Classes](#)
- Update your profile by clicking your name in the top right
- Take a look at the [legislative issues](#) we're tracking, read

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STEP 3

Click on All Workflows



The screenshot shows the same vertical navigation menu as in Step 2. In this step, the 'Workflows' item is expanded, and the 'All Workflows' sub-item is highlighted with an orange border. The rest of the menu and the instructions on the right remain the same as in Step 2.

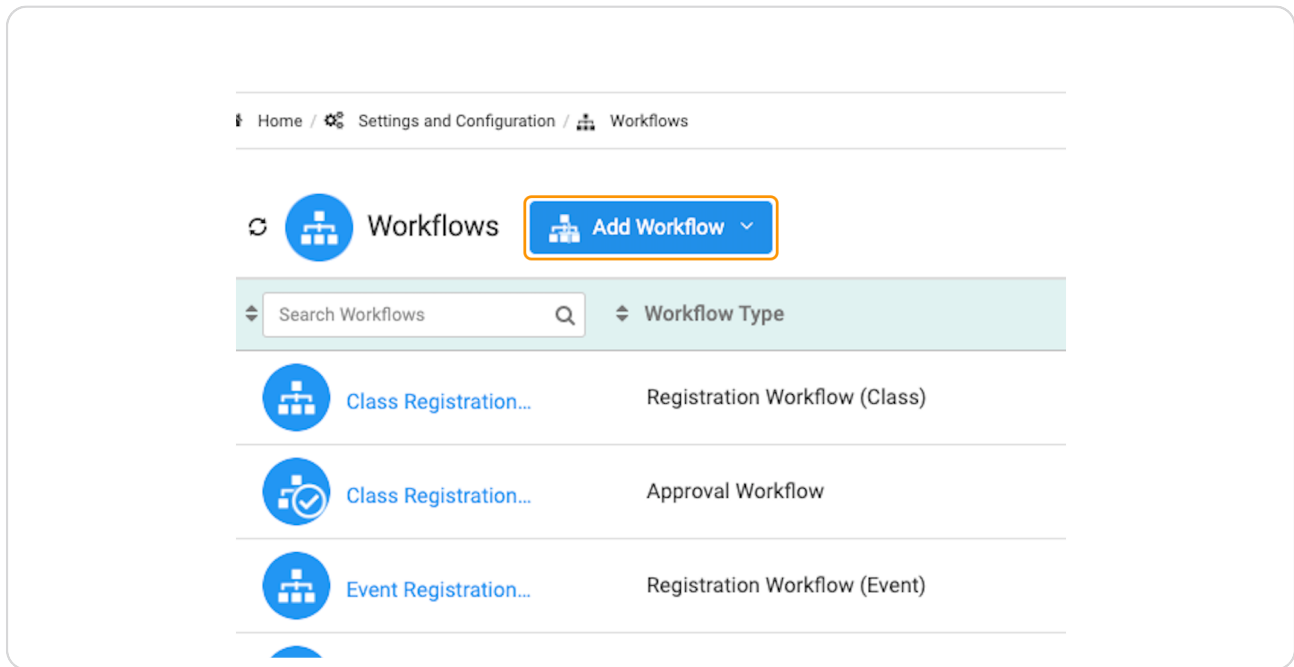
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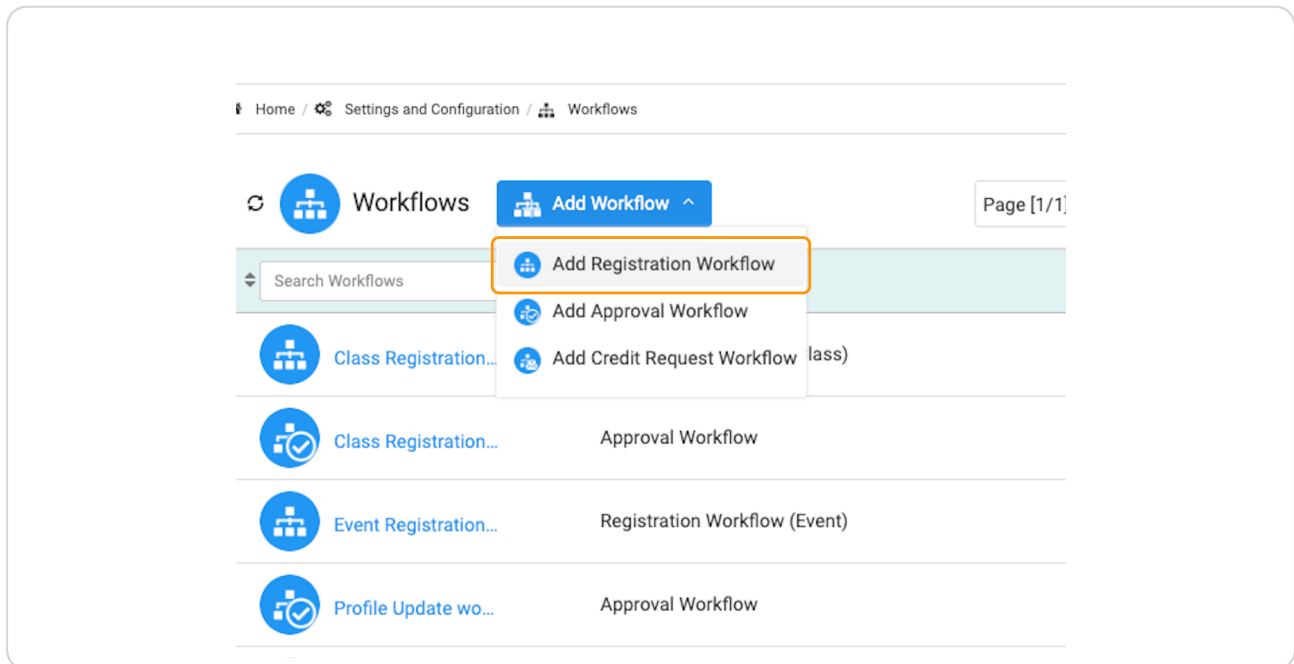
STEP 4

Click on Add Workflow



STEP 5

Click on Add Registration Workflow



STEP 6

Type in the name of your workflow

The screenshot displays the 'Workflows' configuration interface. The breadcrumb trail is 'Home / Settings and Configuration / Workflows'. The main heading is 'Workflows' with a 'Page [1/1] 10' indicator. The form includes:

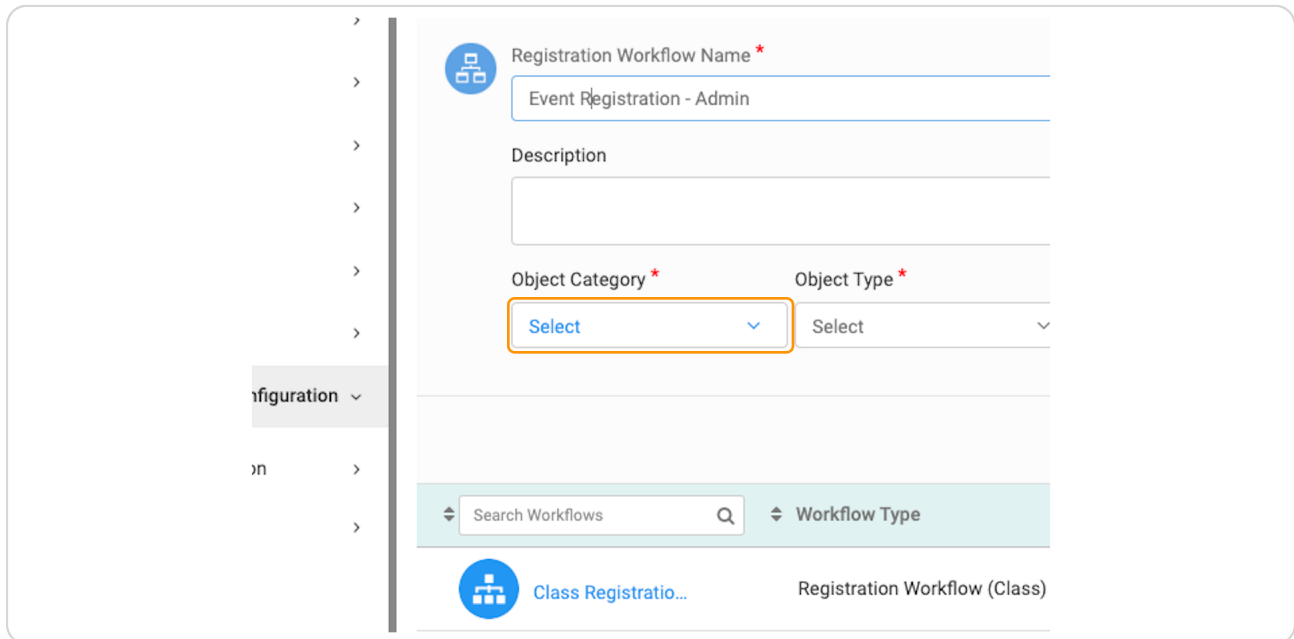
- Registration Workflow Name ***: A text input field containing 'Event Registration - Admin', highlighted with an orange border.
- Description**: A text area for providing details about the workflow.
- Object Category ***: A dropdown menu currently set to 'Select'.
- Object Type ***: A dropdown menu currently set to 'Select'.
- Role(s) ***: A dropdown menu set to 'Select Role(s)', with a 'Select Role(s)' button next to it.

At the bottom, a search bar for 'Search Workflows' and a 'Workflow Type' filter are visible. A table lists existing workflows, with 'Class Registratio...' and 'Registration Workflow (Class)' being visible.

STEP 7

Click on the dropdown for Object Category

"Object" Category here means Event Category in this instance

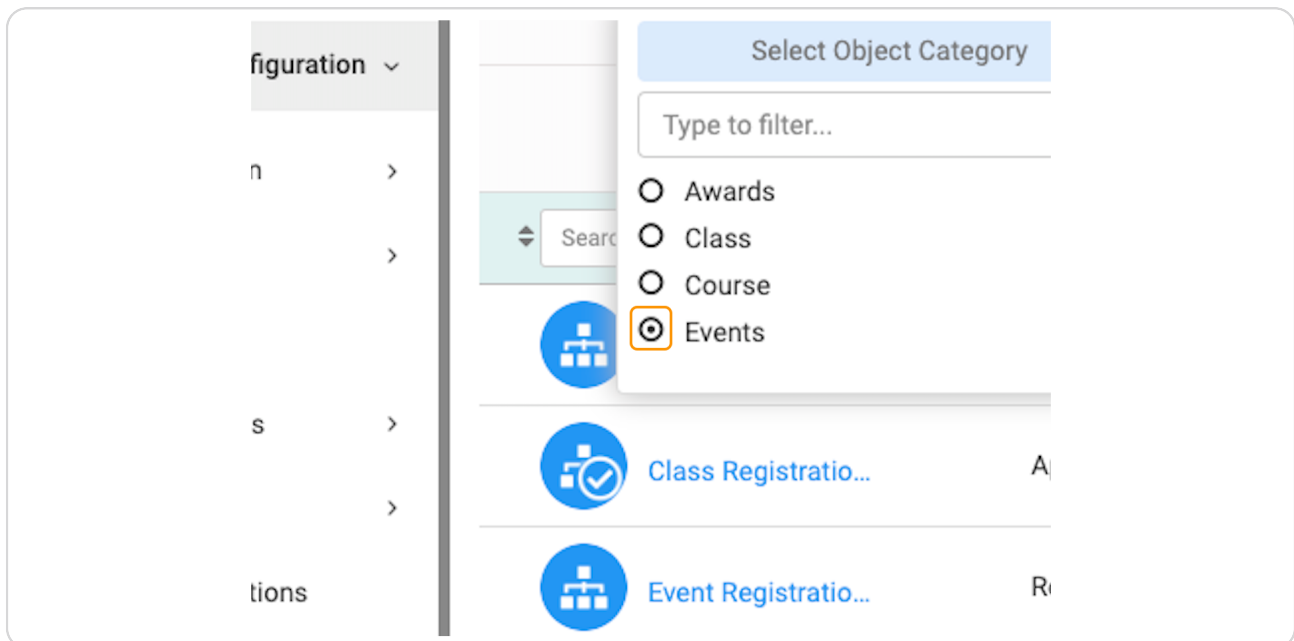


The screenshot shows a configuration form for a registration workflow. On the left is a sidebar with a tree view containing items like 'Configuration', 'n', and 's'. The main form area has the following fields:

- Registration Workflow Name ***: A text input field containing 'Event Registration - Admin'.
- Description**: An empty text input field.
- Object Category ***: A dropdown menu with 'Select' as the current selection. This field is highlighted with an orange border.
- Object Type ***: A dropdown menu with 'Select' as the current selection.
- Search Workflows**: A search input field with a magnifying glass icon.
- Workflow Type**: A dropdown menu.
- Class Registratio...**: A button with a blue icon of a building.
- Registration Workflow (Class)**: A label.

STEP 8

Select Events



The screenshot shows the 'Select Object Category' dropdown menu open. The menu has a search input field with the placeholder text 'Type to filter...'. Below the search field are four radio button options:

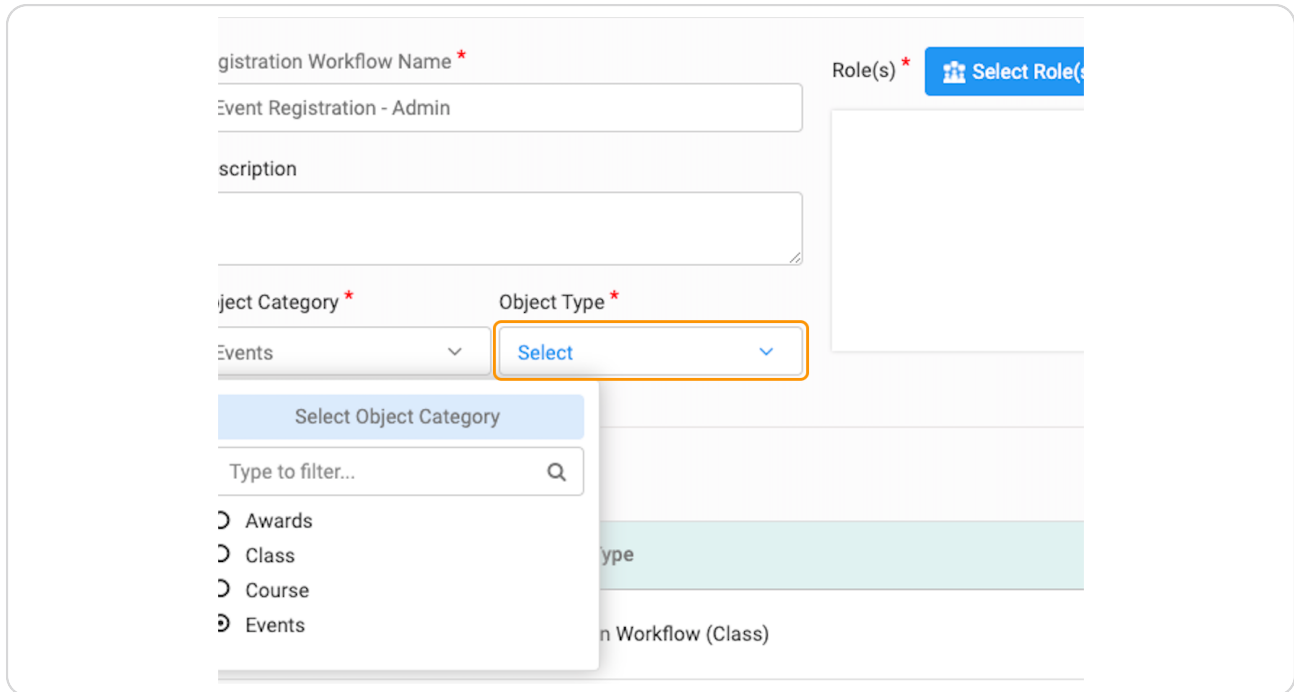
- Awards
- Class
- Course
- Events

The 'Events' option is selected and highlighted with an orange border. Below the menu, the sidebar and main form area are partially visible, showing the 'Class Registratio...' and 'Event Registratio...' buttons and labels.

STEP 9

Click on the dropdown for Object Type

"Object" Type, in this instance, will be your Event Types



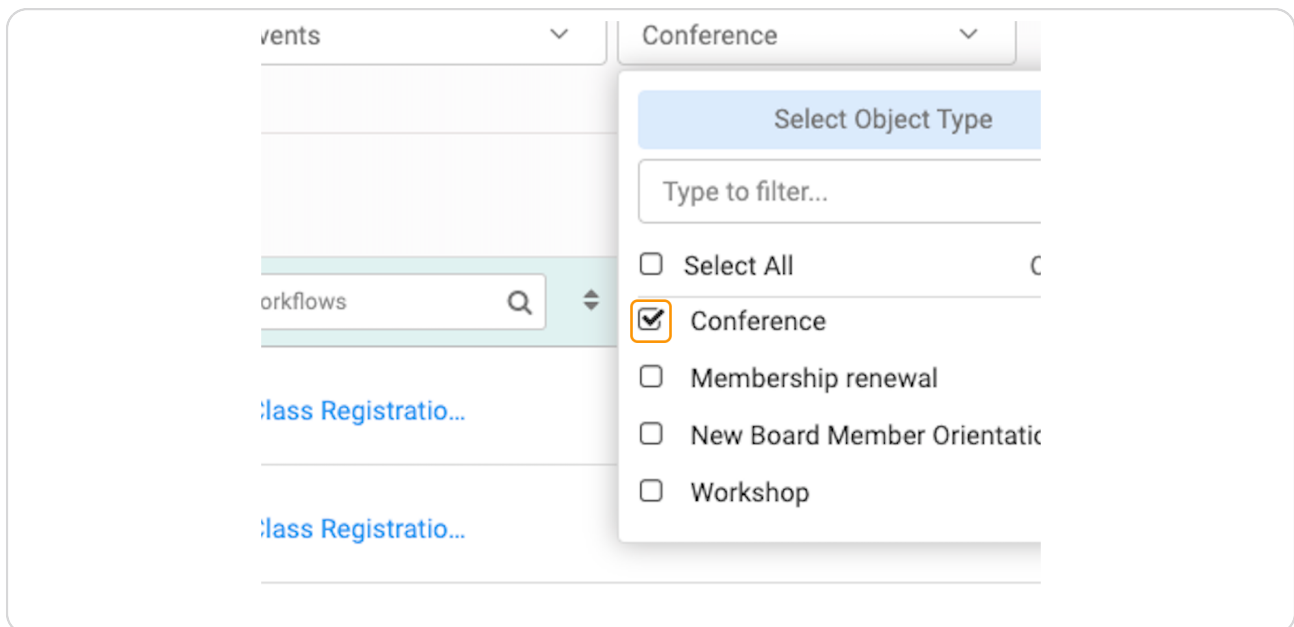
The screenshot shows a configuration form for a registration workflow. The form includes the following fields and elements:

- Registration Workflow Name ***: A text input field containing "Event Registration - Admin".
- Description**: A text area for providing details about the workflow.
- Object Category ***: A dropdown menu currently set to "Events".
- Object Type ***: A dropdown menu currently set to "Select", which is highlighted with an orange border.
- Role(s) ***: A section with a blue button labeled "Select Role(s)" and a list area for assigning roles.
- Select Object Category**: A modal dropdown menu is open, showing a search bar "Type to filter..." and a list of categories: Awards, Class, Course, and Events. The "Events" category is selected.
- Workflow (Class)**: A section for defining the workflow class, with a light blue bar partially visible.

STEP 10

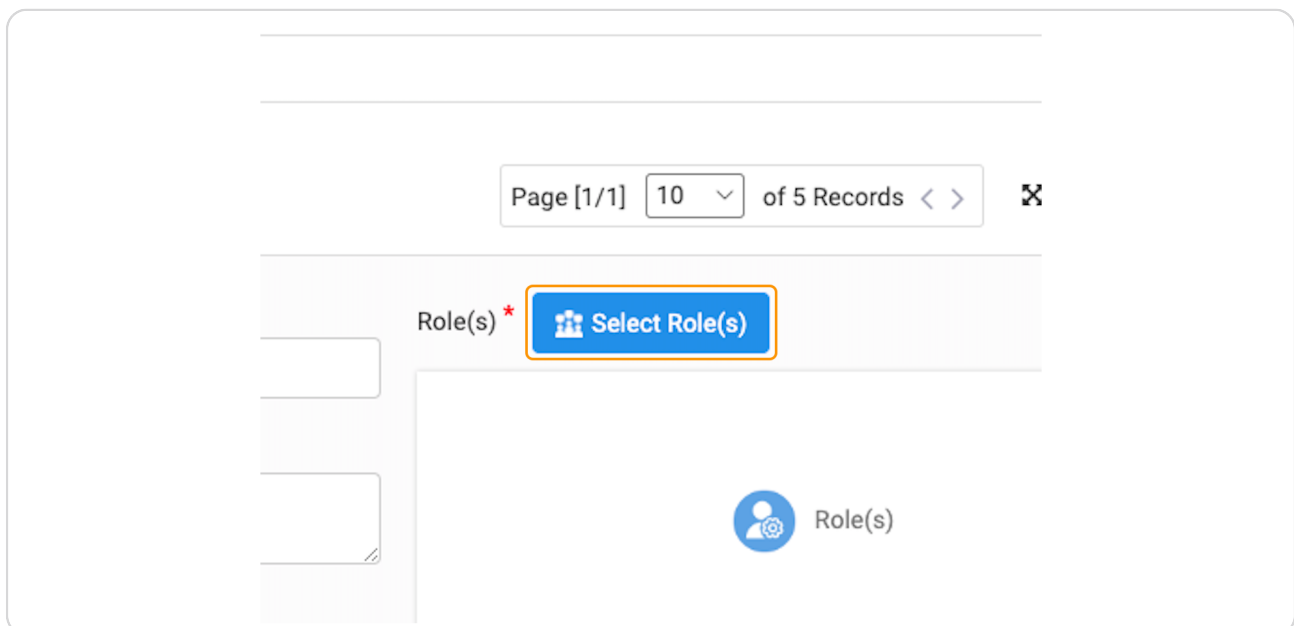
Check off the types of events relevant to your registration workflow

You can select more than one type here, for the purpose of this walkthrough, we will only be selecting one.



STEP 11

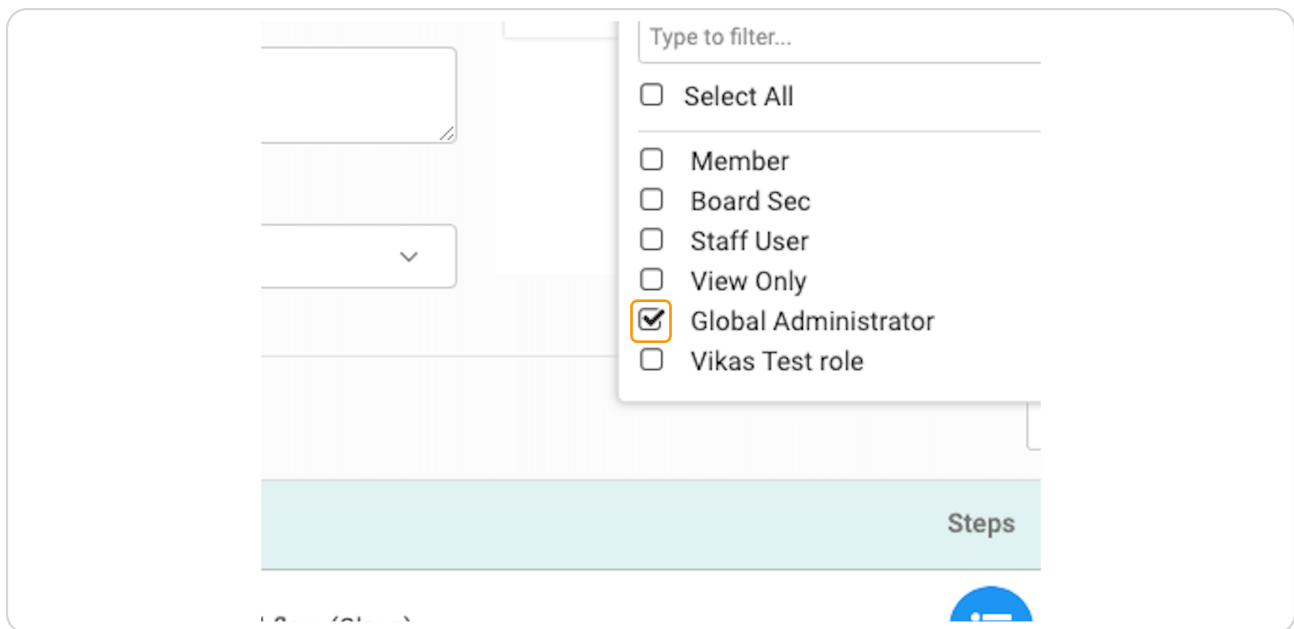
Click on Select Role(s)



STEP 12

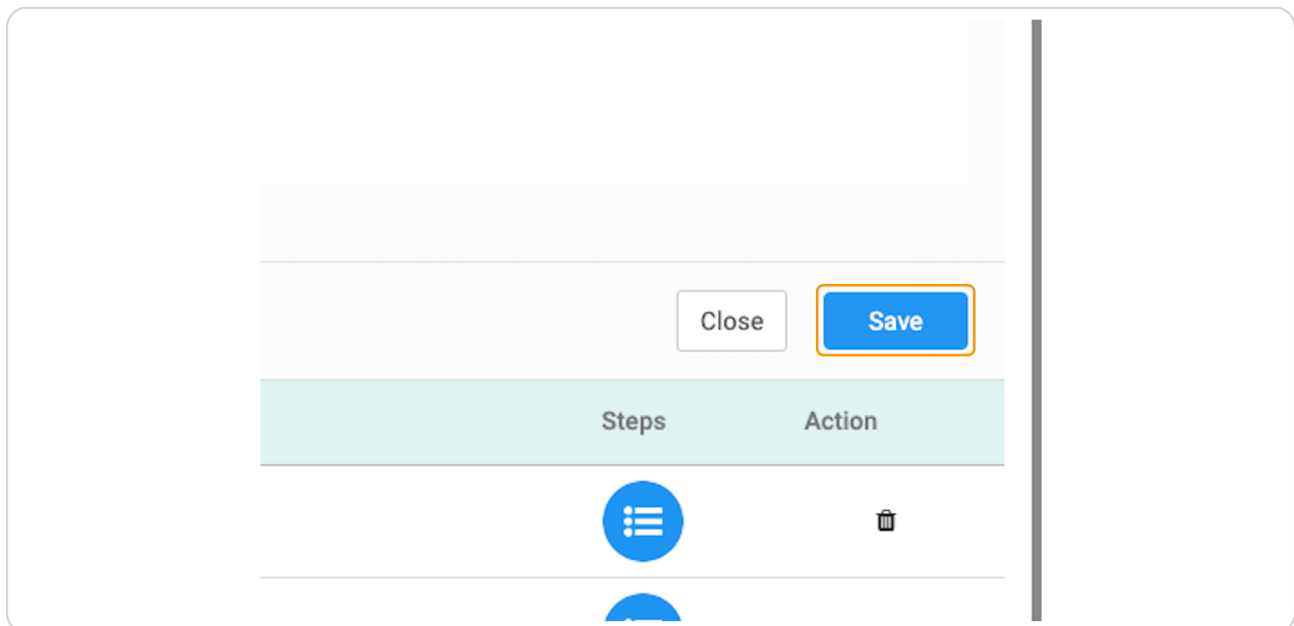
Check off the roles relevant for this workflow

Since we are creating this workflow for Administrators, I've only selected the Global Administrator role, you are able to select multiple roles here, should they apply.



STEP 13

Click on Save



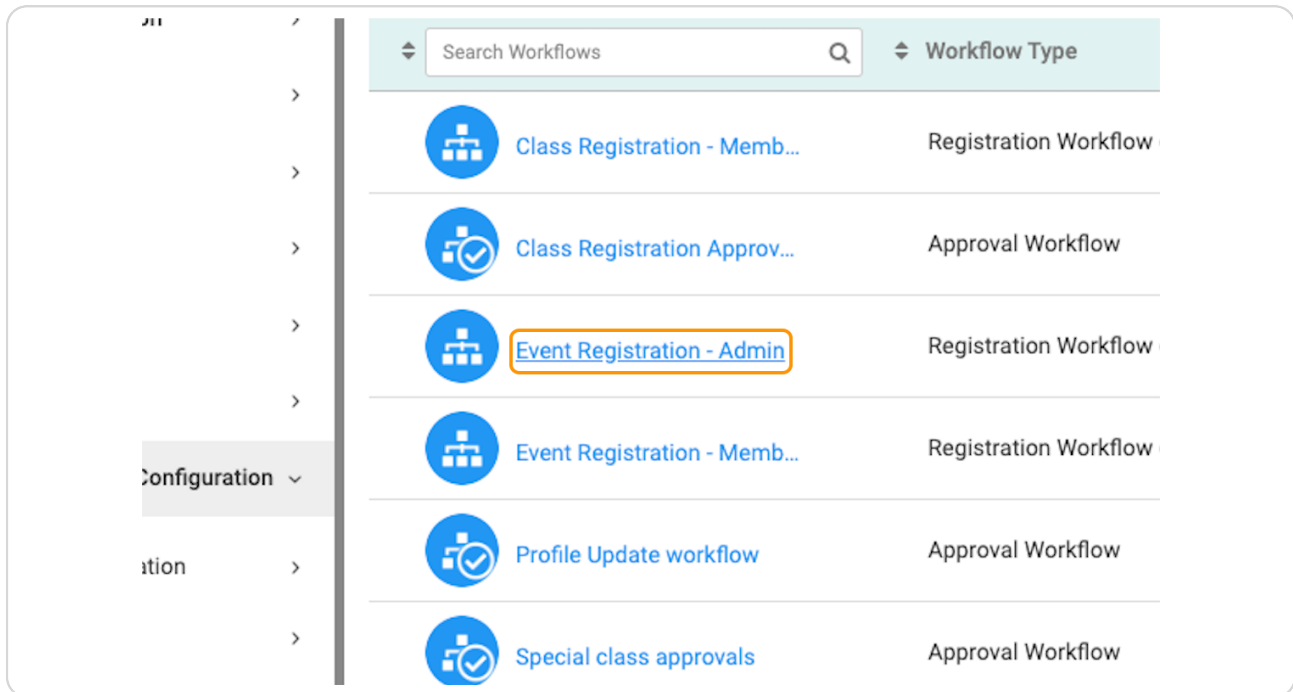
Editing the Workflow Steps

5 Steps

We've set up the base settings for the workflow, now we need to edit the steps you'll encounter while going through the registration process

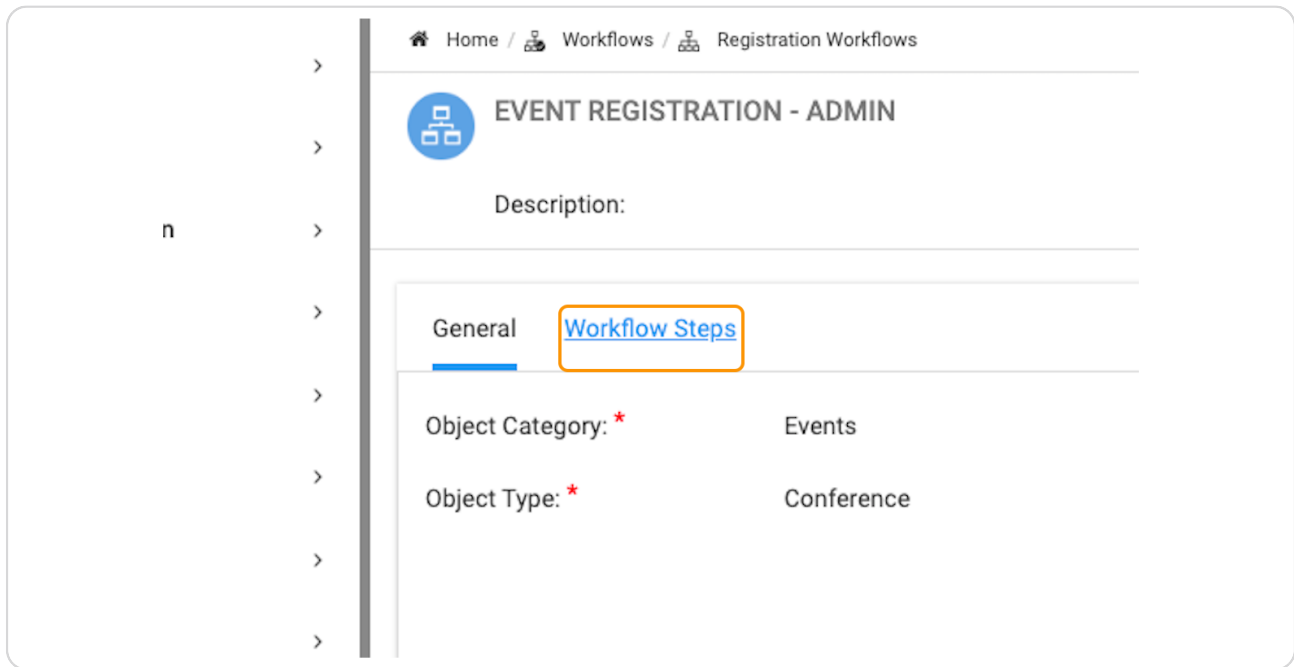
STEP 14

Click on your newly created workflow (in our case, it's named **Event Registration - Admin**)



STEP 15

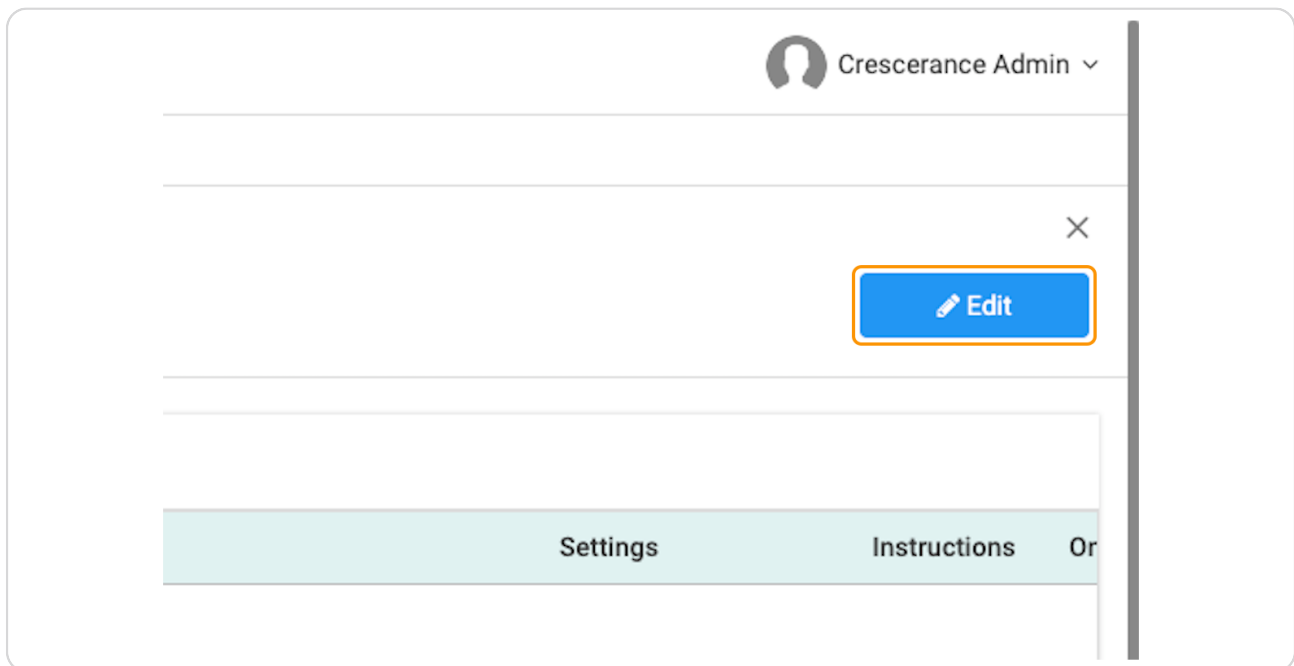
Click on Workflow Steps



The screenshot shows a web interface for 'EVENT REGISTRATION - ADMIN'. The breadcrumb trail is 'Home / Workflows / Registration Workflows'. Below the title, there is a 'Description:' field. A tabbed interface is visible with two tabs: 'General' and 'Workflow Steps'. The 'Workflow Steps' tab is highlighted with an orange border. Below the tabs, there are two form fields: 'Object Category: *' with the value 'Events' and 'Object Type: *' with the value 'Conference'. A vertical sidebar with navigation arrows is on the left, and a user profile icon is on the right.

STEP 16

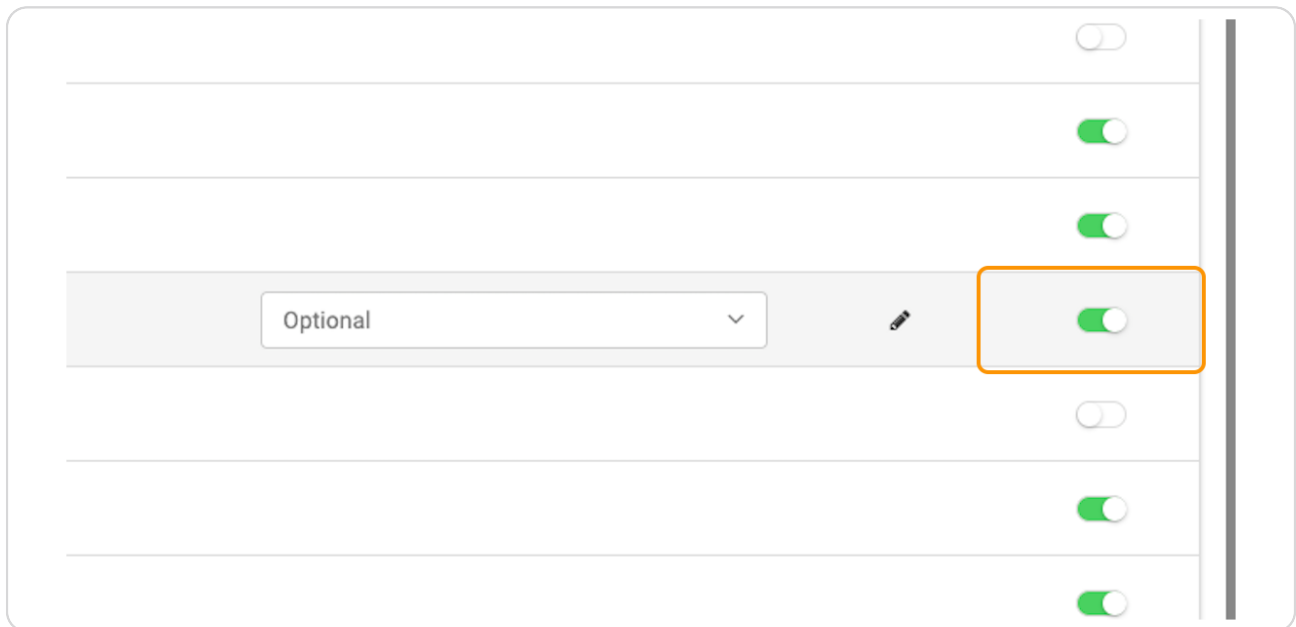
Click on Edit



The screenshot shows the same web interface as in Step 15. The 'Workflow Steps' tab is active. A blue button with a pencil icon and the text 'Edit' is highlighted with an orange border. The button is located in the top right corner of the main content area. The breadcrumb trail is 'Home / Workflows / Registration Workflows'. The user profile 'Crescerance Admin' is visible in the top right. A vertical sidebar with navigation arrows is on the left, and a user profile icon is on the right. At the bottom, there is a light blue bar with the text 'Settings', 'Instructions', and 'Or'.

STEP 17

Scan through the various steps available and decide which ones need to be turned on or off, clicking on the toggle to the right to do so. Green means it's currently turned on and grey/white means it's off



STEP 18

Click Save

