




# How to Configure Enrollment Flows


## Step-by-step Guide to Configuring Enrollment Flows

 Before a new administrator can be added and before people can begin to access the tools available to the CO, the CO must have enrollment flows configured and users invited to the system.


 These instructions assume a CO has been created by the platform administrator.

1. From the COnomize Registry home page, click on the CO listed in the table.
2. In the drop down menu under the name of the CO, click on 'Configuration' and then 'Enrollment'.
3. If the resulting page is blank, click on 'Add/Restore Default Templates'.
4. Choose one or more templates to 'Duplicate' by clicking on the Duplicate link next to the appropriate template.
5. When you have created a copy of an enrollment flow, click on Edit, then rename the enrollment flow and review the options.

 You will need to change the status of the new enrollment flow to 'Active'. Renaming it is also a good idea.

 These are the default templates. Note that they are best thought of as starting points; **customization is recommended** in accordance with the needs of a given deployment.

Default flow	Description
Account Linking (template)	An Account Linking enrollment flow is used by an end-user (in this case, making them the 'Petitioner') who is already in the CO when they want to link an additional organizational identity to their record.
Additional Role (template)	
Conscription with Approval (template)	A Conscription enrollment flow is used by an administrator (in this case, making the administrator the 'Petitioner') to add a new user (an 'Enrollee'), possibly with CO admin approval but <i>without enrollee confirmation</i> .
Invitation (template)	An Invitation enrollment flow is used by an administrator (in this case, making the administrator the 'Petitioner') to add a new user (an 'Enrollee'), possibly with CO admin approval, and <i>always with enrollee confirmation</i> .
Self Signup with Approval (template)	In this case, the end-user is also Petitioner; they can follow a workflow and invite themselves to the CO with no approval process required before activation.

 For more detail on enrollment flows and their details, see [Registry Enrollment Flow Configuration](#) in the COnomize technical manual.