



Secretary of State
Elaine F. Marshall

North Carolina Secretary of
State
IT
Event Registration Website
Manual

February 15, 2023

Version 1.0



Secretary of State
Elaine F. Marshall

About the NCSOS Event Registration Manual

This manual covers the user interface and steps for using the NCSOS Event Registration website. After the overview section, there's a user's guide for customers followed by a user's guide for event organizers.



Secretary of State
Elaine F. Marshall

Table of Contents

.....	2
About the NCSOS Event Registration Manual	2
Overview	1
Section 1: User’s Guide for Customers (Attendees)	1
User Interface and Registration Instructions.....	1
Section 2: User’s Guide for Event Organizers	6
Soskb Workflow Event Registration Website	6
Details link.....	8
View Event Registration	9
Details	10
Location.....	10
Speakers	11
Attendees.....	11
Attachments.....	12
Questions	12
History.....	13
How to Schedule an Event	15
Developer Notes	21

NCSOS Event Registration Website Manual

Overview

The NC Secretary of State [Event Registration](#) website provides a way for the public to sign up for online and in-person workshops and events at SOS like the virtual fireside chats for NC notaries.

Customers can register online for the scheduled events listed on the website. The links and steps for registering are described in [Section 1: User’s Guide for Customers \(Attendees\)](#).

The User’s Guide for Event Organizers is in [Section 2: User’s Guide for Event Organizers](#).

Section 1: User’s Guide for Customers (Attendees)

User Interface and Registration Instructions

The E-Notary Division and Securities Division are the main hosts for these events. Registration is via an online form located at https://sosnc.gov/online_services/Event_Registration

The website header has a preview for an upcoming event or an overview of a previous one. A large picture accompanies this preview.

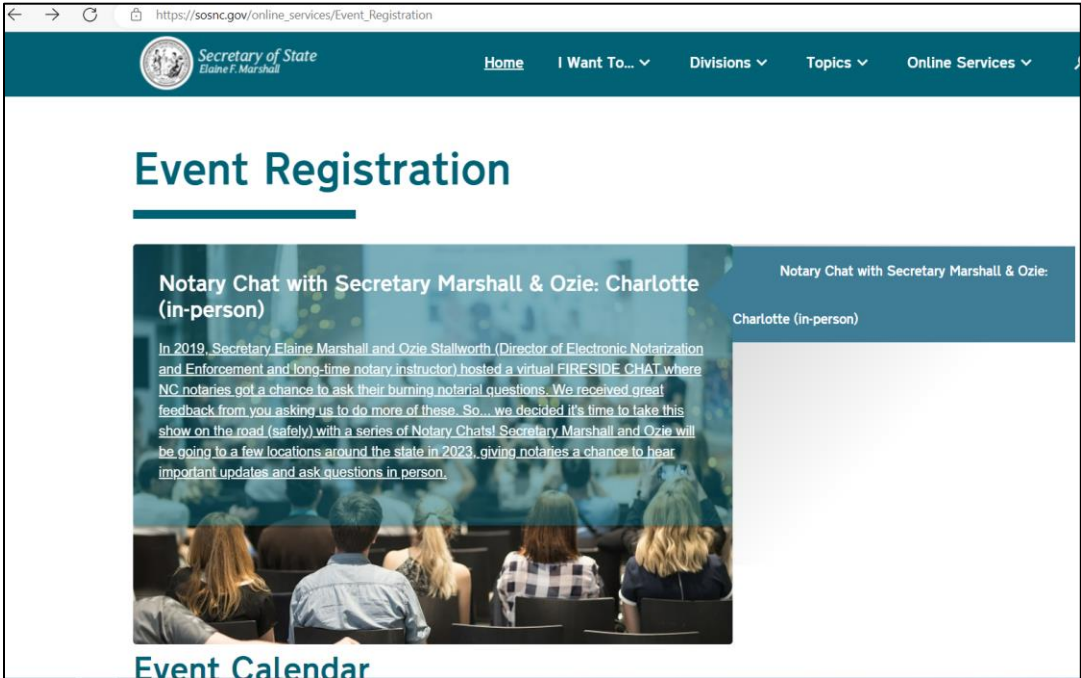


Figure 1. Event Registration website

A Calendar of events takes up the bottom half of the website. Upcoming events are highlighted on the days they are scheduled.

Step 1. Users can click on the event for which they want to register.

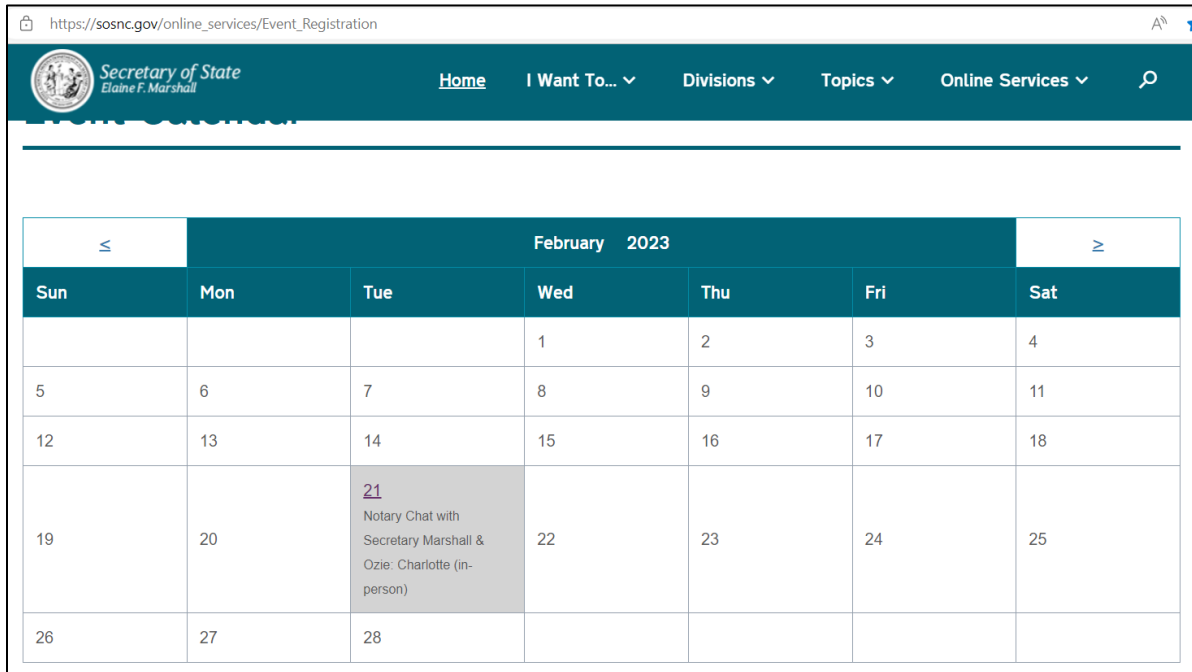


Figure 2. Calendar of Events page

Step 2. After clicking on the event date, the user is taken to an **Event Registration Calendar** page where they find general information about the event such as time, date, and pricing.

Step 3. Users click on the “**Click Here for More Details**” link.

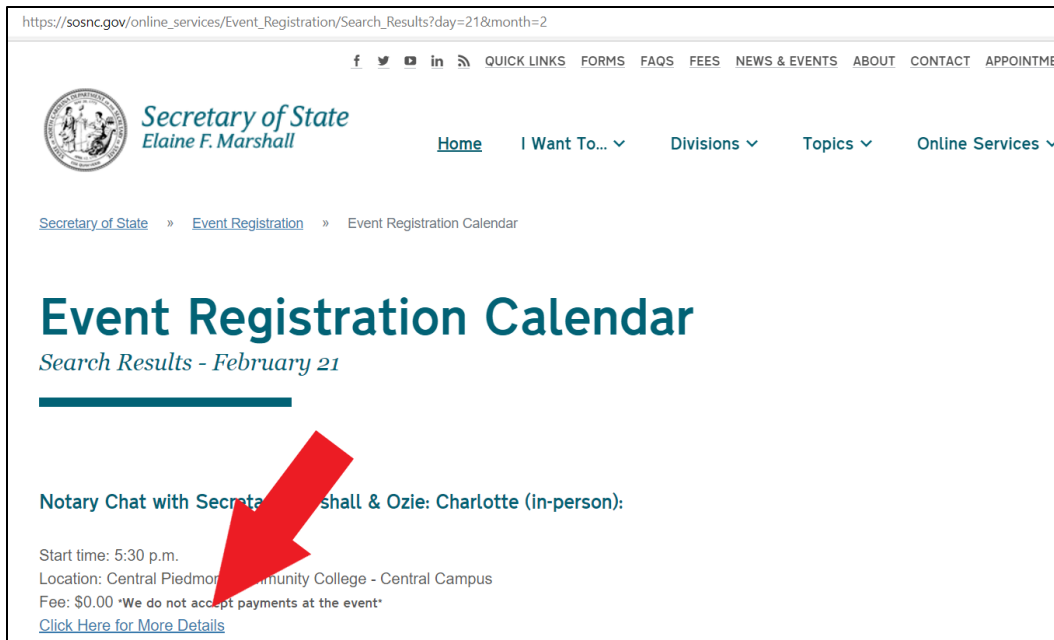


Figure 3. Click Here for More Details

This takes the user to an event-specific page giving even more detailed information about the event such as the building and room as well as speakers and contact information.

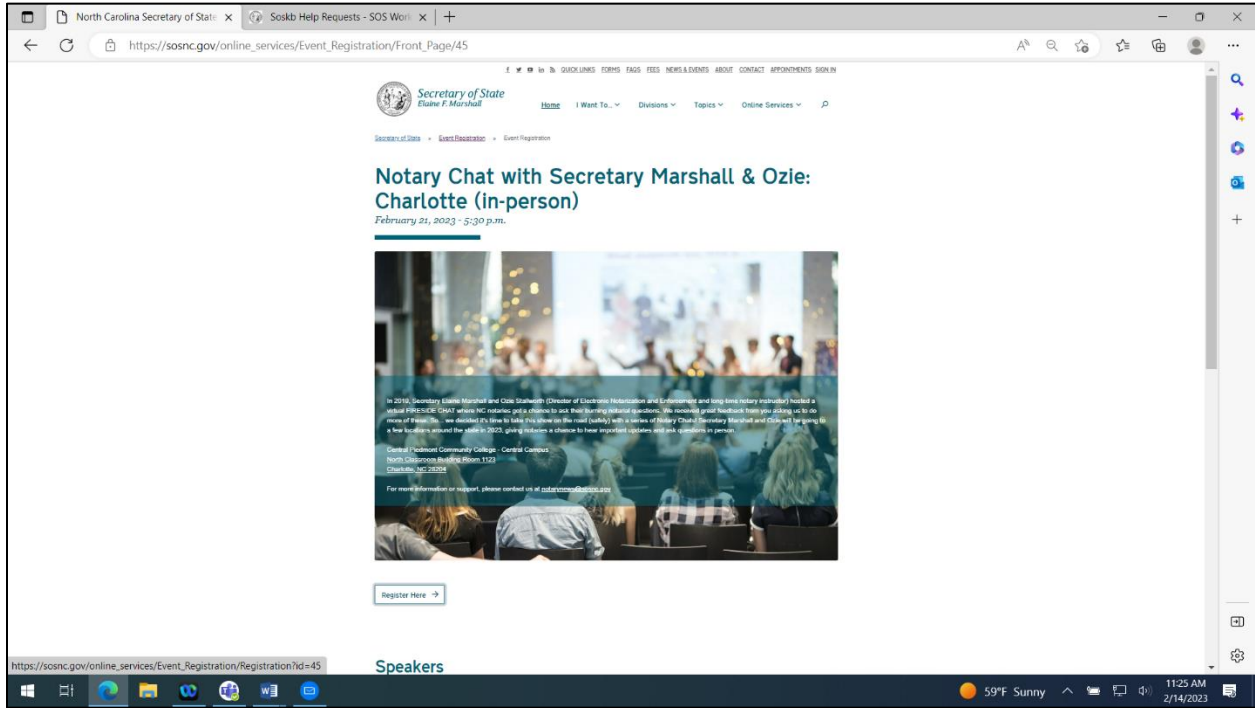


Figure 4. Detailed even information

Step 4. Users click the **Register Here** button at the bottom.

This takes them to the registration page where they will fill out the **Name, Company, Address, Phone, Email,** and **County** information. See **Figure 5.**

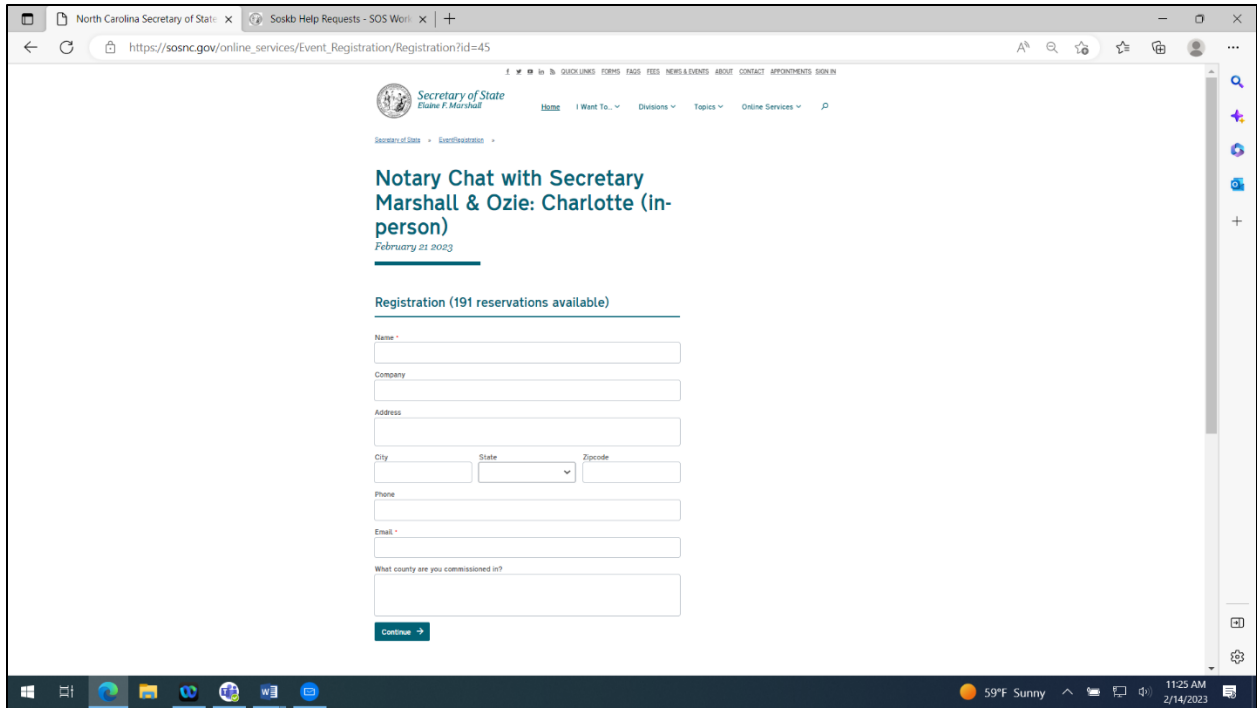
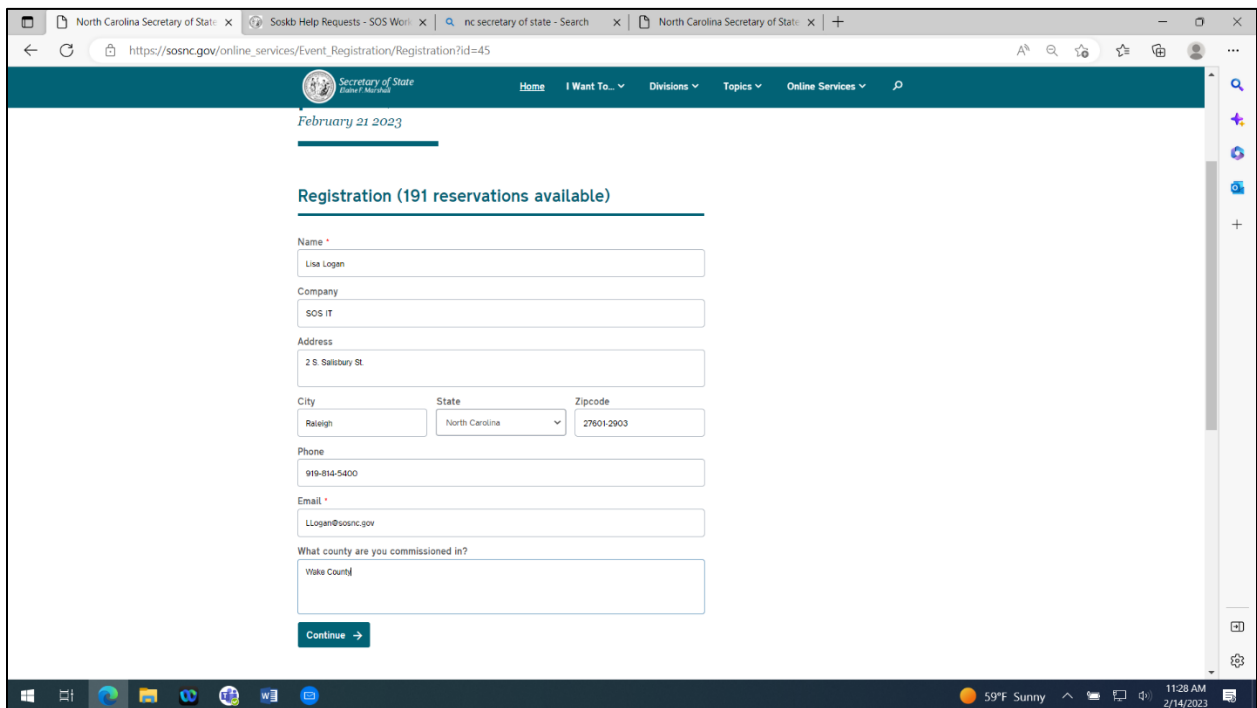


Figure 5. Registration online form

Step 5. User fills in the online form.



Step 6. User clicks the **Continue** button. See Figure 6.

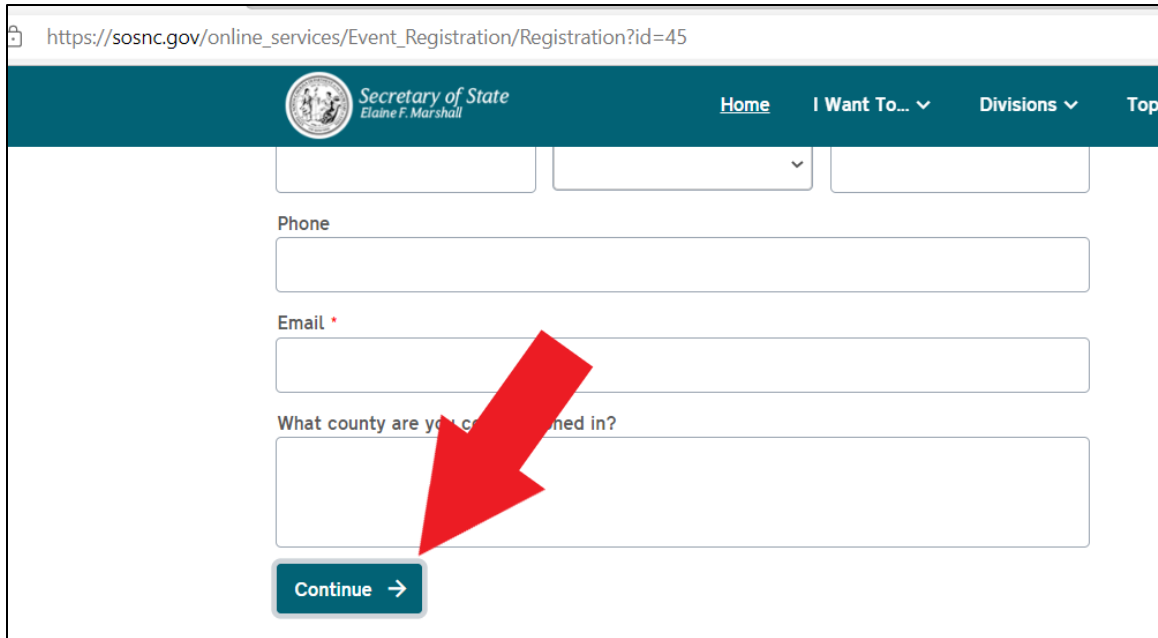


Figure 6. Click Continue

This takes the user to a page where you'll click **Add Attendee**. See **Figure 7**. You may be sent to a payment page if the event is a paid one. Most of the events are free of charge. The payment page will prompt the user through the payment process.

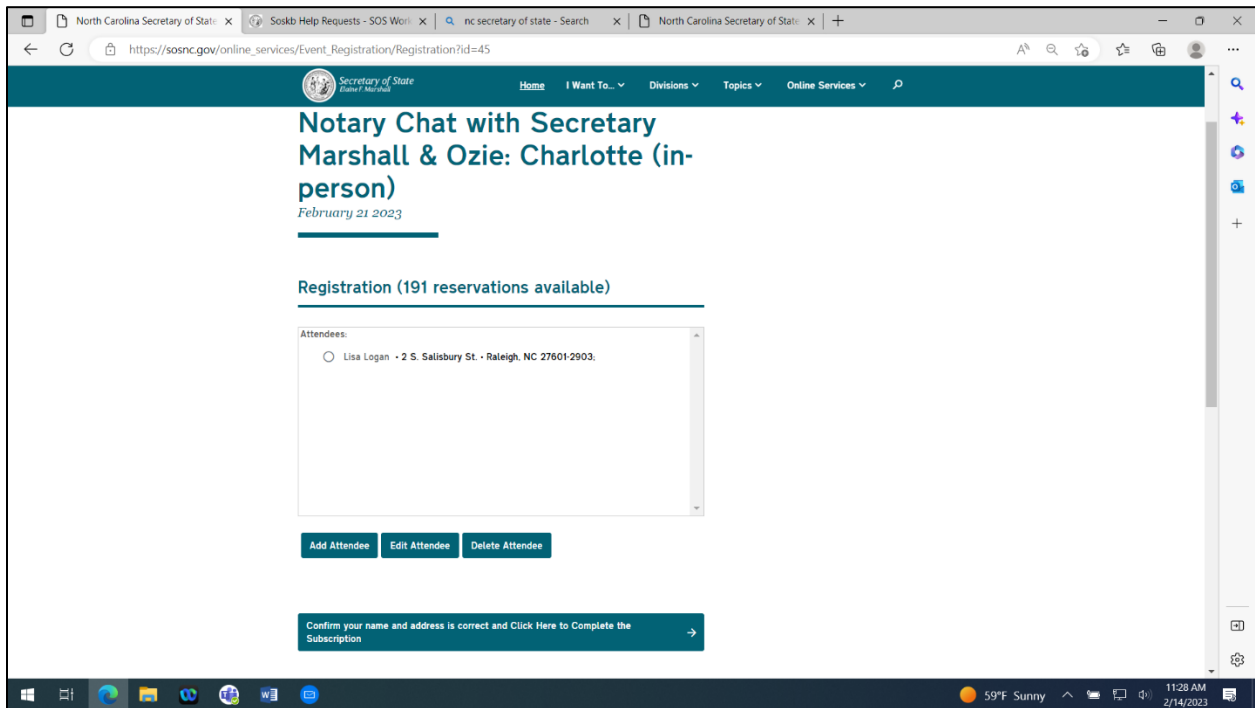


Figure 7. Add Attendee

An email confirmation arrives in the registrant's email.

Section 2: User’s Guide for Event Organizers

First, we will cover the user interface for the Event Registration website on Soskb Workflow. This section is intended for event organizers. We begin with an overview of the user interface and then describe the steps for adding a new event.

If you want to skip to the steps, click [How to Schedule an Event](#)

Your attendees will sign up at [North Carolina Secretary of State Event Registration Event Registration \(sosnc.gov\)](#)

As the event organizer, you will be working in Soskb Workflow which is described in the next subsection.

Soskb Workflow Event Registration Website

Go to the **Soskb Workflow** via [Soskb Help Requests - SOS Workflow](#).

This takes you to the **Event Registration** website. See **Figure 8**.

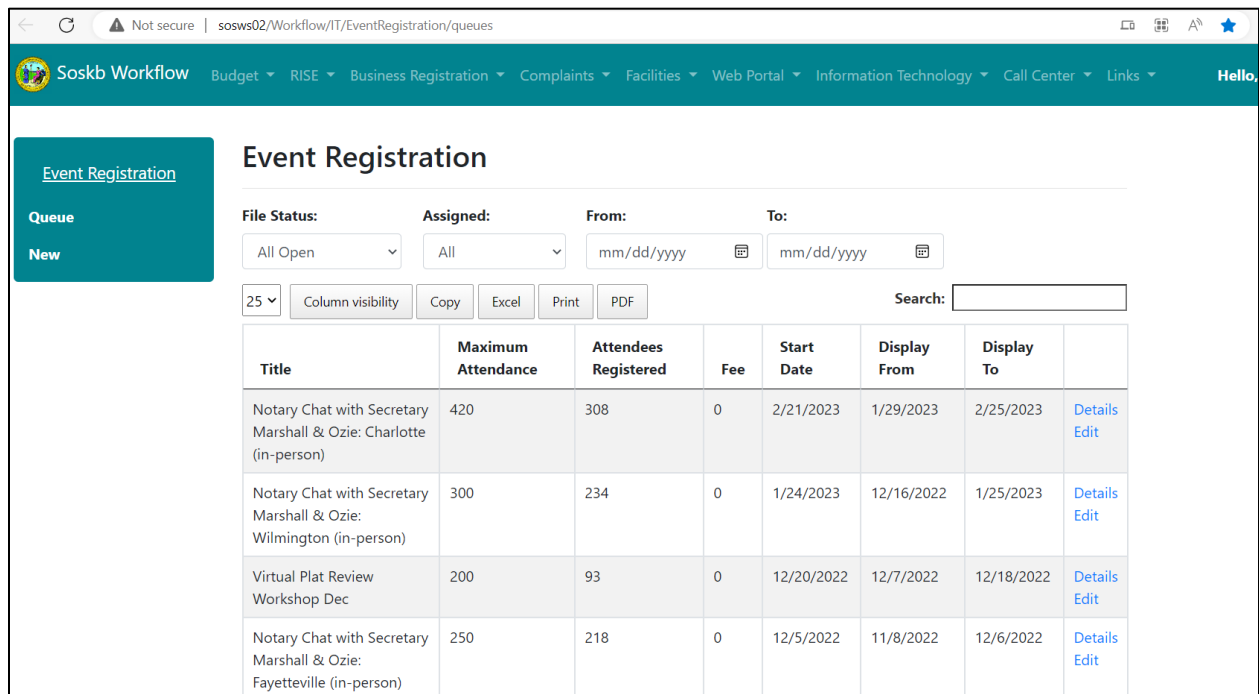


Figure 8. Event Registration website

This **Event Registration** website has two navigation links on the upper left side of the screen: **Queue** and **New**. See **Figure 9**.

New takes you to a page for creating a new event.

Queue takes you to a list of previous and upcoming events.

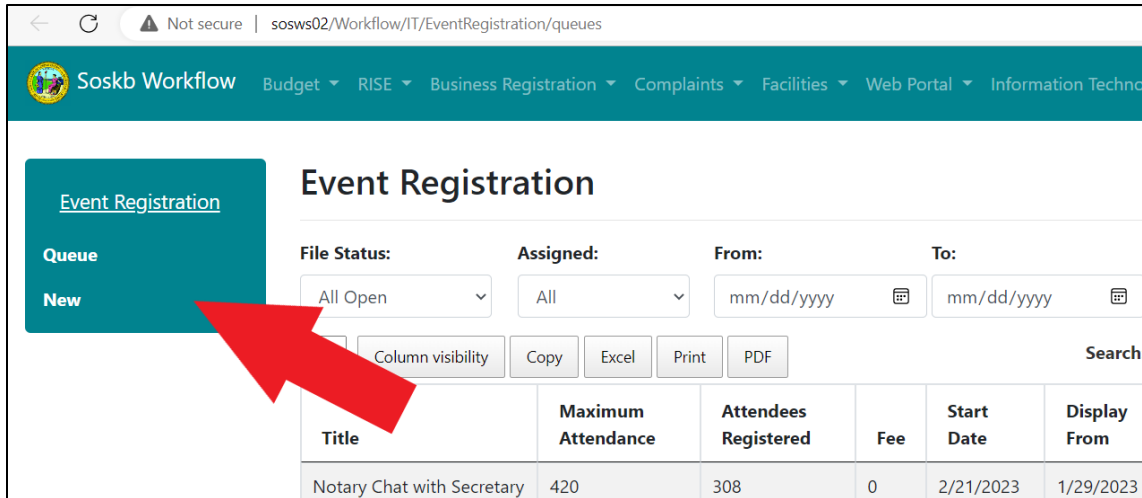


Figure 9. Queue and New links

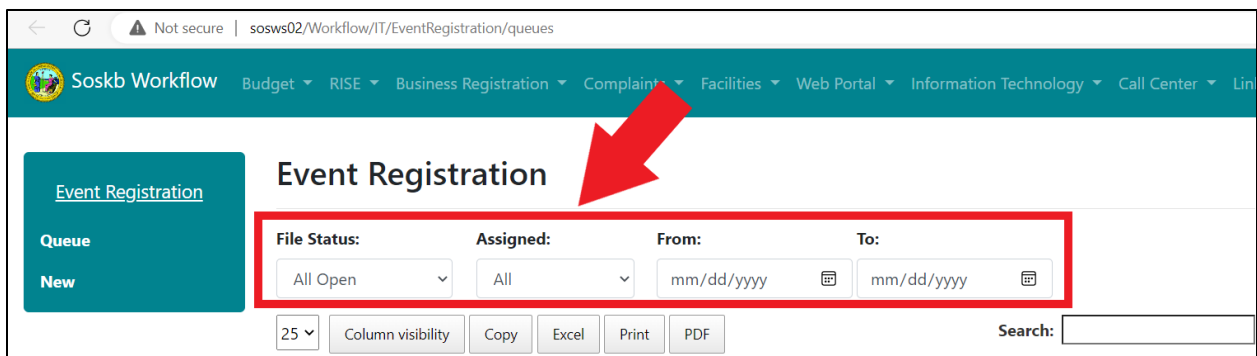
Across the top middle part of the screen are four dropdown and date selection options.

File Status: Dropdown list of statuses including: **New, Approved, Pending Approval, Cancelled, and Active Last.** There are more to choose from, but these are the main ones.

Assigned: List of employee and presenter names.

From: Beginning date selector for selection of events.

To: End date selector for selection of events.



Below these dropdown and selector tools, is a large table containing the following column headers:

- Title
- Attendees Registered
- Start Date
- Display To
- Maximum Attendance
- Fee
- Display From
- Blank

Title: The title of the event.

Maximum Attendance: This is the highest number of registrants allowed for the event.

Attendees Registered: The number of attendees already registered for the event.

Fee: The fee charged for the event.

Start Date: The day the event begins.

Display From: The first day for publicizing the upcoming event to potential attendees.

Display To: The last day for publicizing the upcoming event in question.

Blank: This column with the blank header contains two links on each record line. The two links are: **Details** and **Edit**. The Details link takes you to a page where you can view all the details of the event. The **Edit** link takes you to a page where you can edit the event.

Title	Maximum Attendance	Attendees Registered	Fee	Start Date	Display From	Display To	
Notary Chat with Secretary Marshall & Ozie: Charlotte (in-person)	420	308	0	2/21/2023	1/29/2023	2/25/2023	Details Edit
Notary Chat with Secretary Marshall & Ozie: Wilmington (in-person)	300	234	0	1/24/2023	12/16/2022	1/25/2023	Details Edit
Virtual Plat Review Workshop Dec	200	93	0	12/20/2022	12/7/2022	12/18/2022	Details Edit
Notary Chat with Secretary Marshall & Ozie: Fayetteville (in-person)	250	218	0	12/5/2022	11/8/2022	12/6/2022	Details Edit

Figure 10. Event Registration page

Details link

Let's take a closer look at the **Details** link in the blank column just mentioned. See **Figure 11**.

Click on the **Details** link. This takes you to the **View Event Registration** page. See **Figure 12**.

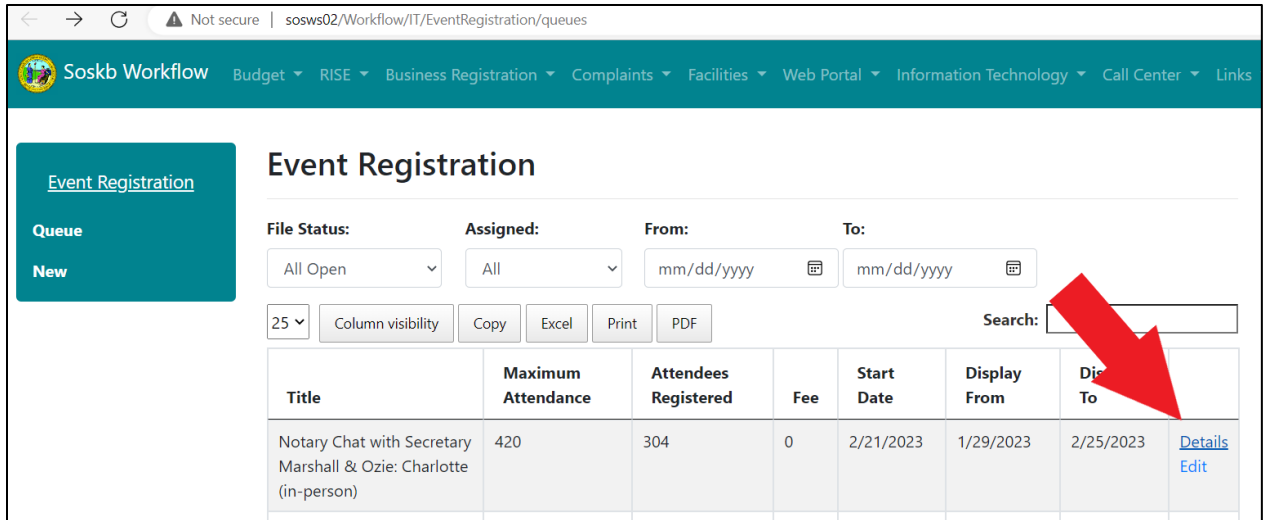


Figure 11. Details link

View Event Registration

The **View Event Registration** page displays the main details about the event we selected. It has seven tabs of linkable navigation: **Details, Location, Speakers, Attendees, Attachments, Questions, and History.**

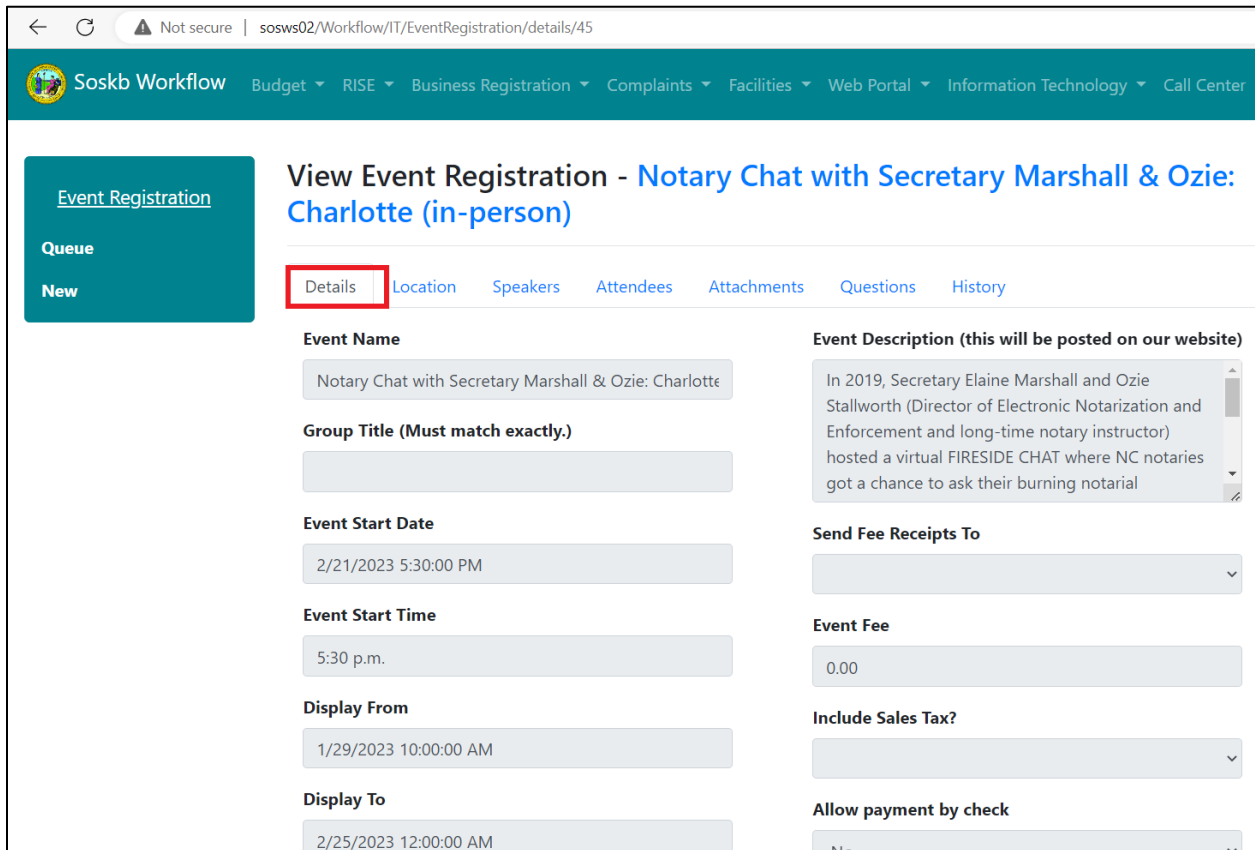


Figure 12. View Event Registration page with "Details" tab highlighted

Details

Click on the **Details** tab. See **Figure 12**.

This takes you to the **Details** tab for the chosen event.

Here, you will find the following entry fields:

- Event Name
- Event Start Date
- Display From
- Contact Email
- Event Description
- Event Fee
- Allow Payment By Check
- External Registration URL.
- Group Title
- Event Start Time
- Display To
- Event Video (link)
- Send Free Receipts To
- Include Sales Tax
- Maximum Attendance

The entry fields listed above are self-explanatory. The **Send Fee Receipts To** field is for paid events. This entry may indicate hotel fees or workshop booklet—something of value that was paid for as part of the event. This does not apply to free events. This is solely for the accounting unit to use for their budgetary purposes.

Location

Click the **Location** tab.

The screenshot shows a web browser window with the URL `sosws02/Workflow/IT/EventRegistration/details/45`. The page title is "View Event Registration - Notary Chat with Secretary Marshall & Ozie: Charlotte (in-person)". The "Location" tab is selected and highlighted with a red box. The form fields are as follows:

Field	Value
Event Location	Central Piedmont Community College - Central Camp
Address Line 1	North Classroom Building Room 1123
Address Line 2 (optional)	1320 Sam Ryburn Walk
City	Charlotte
State	North Carolina
Zipcode	28204

Figure 13. Location tab

This takes you to the Location page where you will find even location entry fields such as **Address Line 1, Address Line 2, City, State, and Zipcode.**

Speakers

Click the **Speakers** tab. See **Figure 14.**

This takes you to the **Speakers** tab where you will see information about the speaker's **name, company, title, and biography.** See **Figure 14.**

View Event Registration - Notary Chat with Secretary Marshall & Ozie: Charlotte (in-person)

Details Location **Speakers** Attendees Attachments Questions History

25 Search:

Speaker	Company	Title	Biography	
Ozie Stallworth	NC Office of Secretary of State	Director of Electronic Notarization and Enforcement		Edit Remove
Elaine F. Marshall	NC Office of Secretary of State	Secretary of State		Edit Remove

Showing 1 to 2 of 2 entries Previous 1 Next

Figure 14. Speakers tab

Attendees

Click the **Attendees** tab.

This takes you to a page that displays the Attendees' **name, company, email, phone number, and current status (paid).** See **Figure 15.**

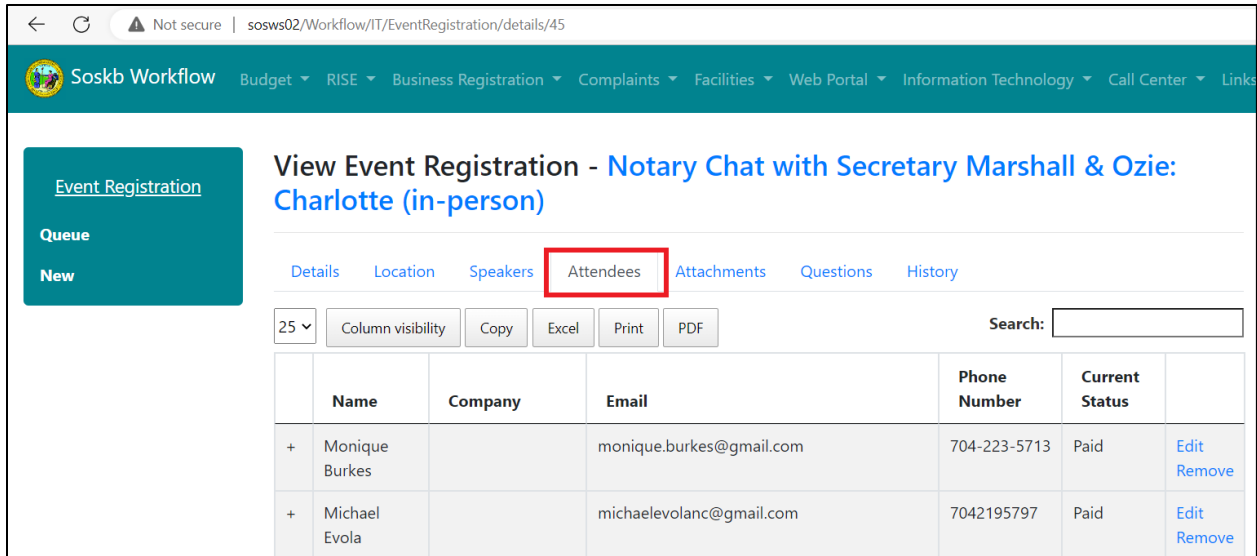


Figure 15. Attendees tab

Attachments

Click the **Attachments** tab. See **Figure 16**.

The **Attachment** tab displays a list of available files that attendees can download for the event. You can upload or “drop files” on this page by clicking the **Drop Files Here** button in the bottom right corner of the page. See **Figure 16**.

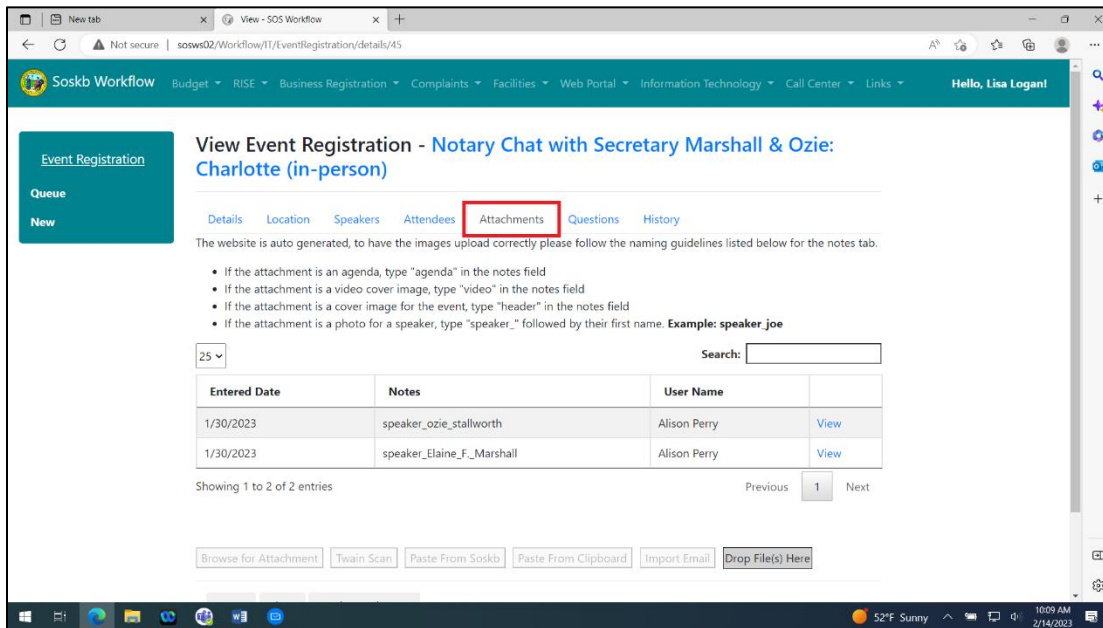


Figure 16. Attachments tab

Questions

Click the **Questions** tab.

The **Questions** tab displays questions for the registrants to answer when registering for the event. For example, in **Figure 17**, the question is about the registrants' county in which they are commissioned.

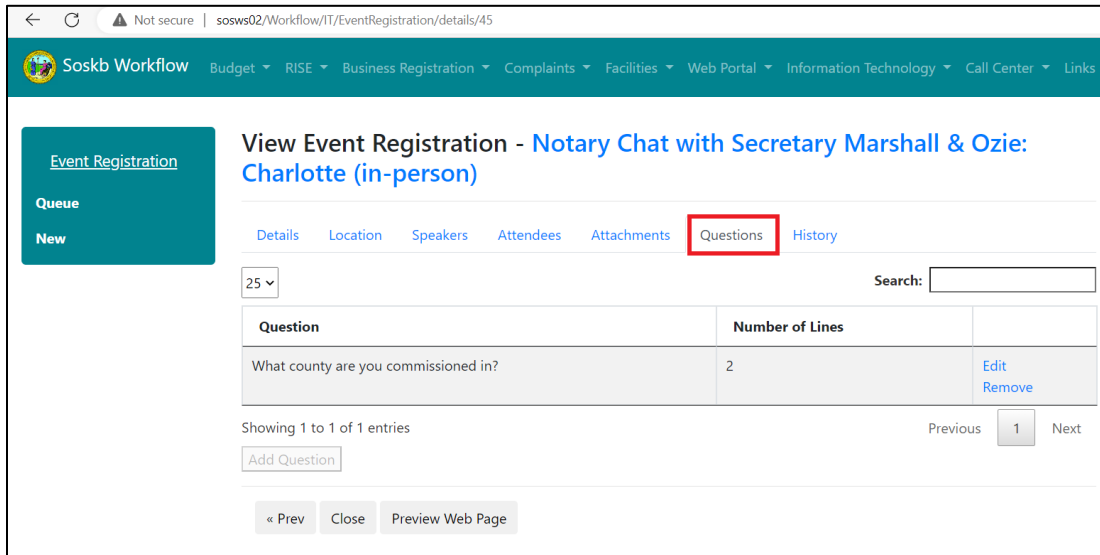


Figure 17. Questions tab

History

Click the **History** tab.

The **History** tab gives you the details about each event. Click the **Log Details** link for a detailed run-down of the selected event. See **Figure 18**.

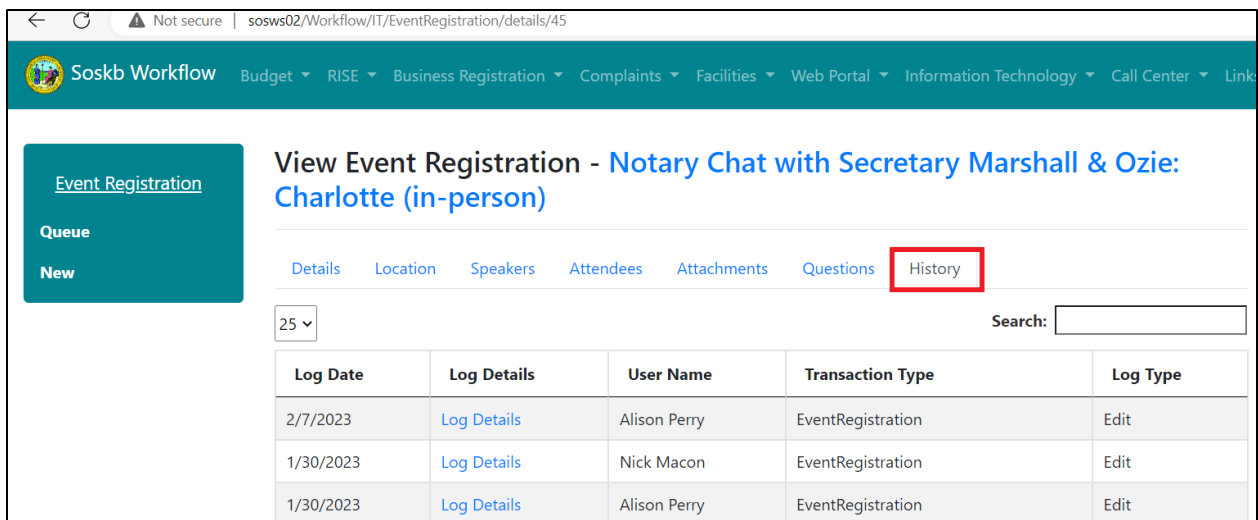


Figure 18. History tab

The **History** tab contains a table of previous events with details such as: **Log Date**, **Log Details**, **User Name**, **Transaction Type**, and **Log Type**.

When you click on the **Log Details** link, a popup appears with location information. **Address Line1** is the name of the event location, building name, and room number. **Address Line2** (optional) is the actual street address of the event location.

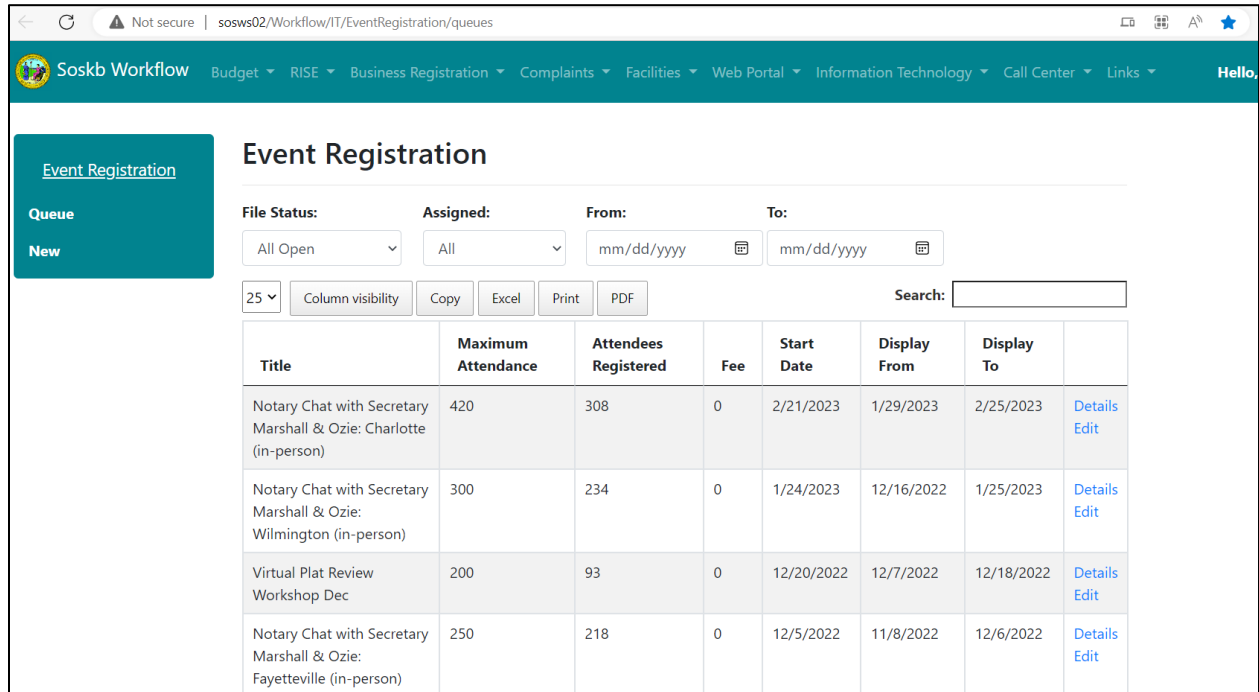
At the bottom of the **View Event Registration** page, you'll find a Preview webpage button. This button takes you to a preview of the event details. You can edit the entries and click the **Submit Request** button to update the event information.

If you click the **Close** button at the bottom left of the screen, it sends you back to the main Event Registration page.

How to Schedule an Event

Step 1. Go to the **Soskb Workflow** via [Soskb Help Requests - SOS Workflow](#).

This takes you to the **Event Registration** website. See **Figure 19**.

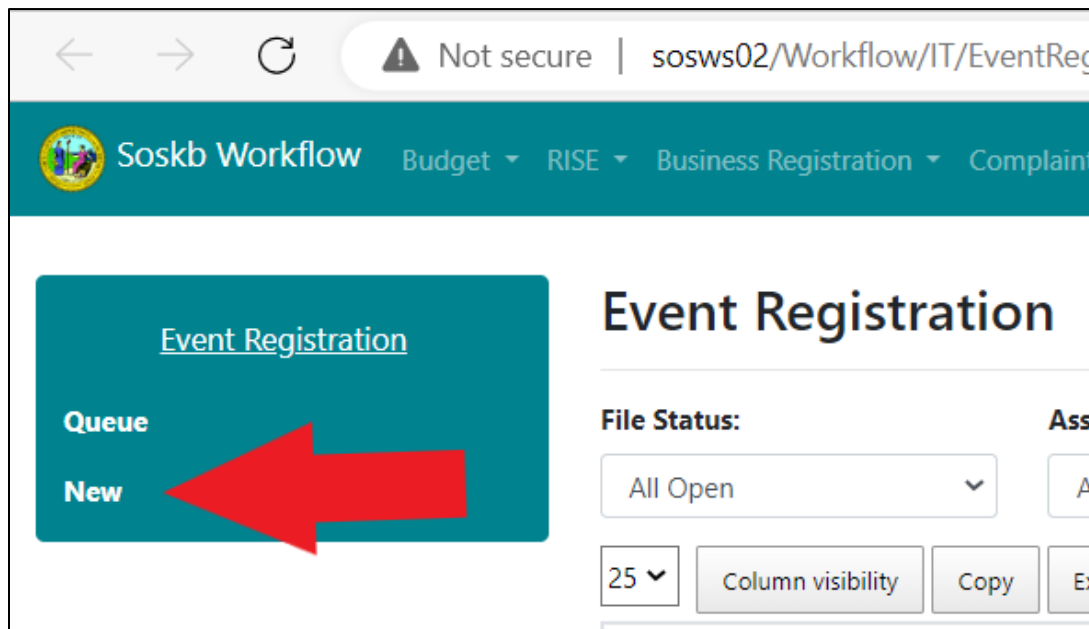


The screenshot shows the 'Event Registration' main page. The page has a teal header with the 'Soskb Workflow' logo and navigation menu. A sidebar on the left contains 'Event Registration', 'Queue', and 'New' links. The main content area features a table of events with the following data:

Title	Maximum Attendance	Attendees Registered	Fee	Start Date	Display From	Display To	
Notary Chat with Secretary Marshall & Ozie: Charlotte (in-person)	420	308	0	2/21/2023	1/29/2023	2/25/2023	Details Edit
Notary Chat with Secretary Marshall & Ozie: Wilmington (in-person)	300	234	0	1/24/2023	12/16/2022	1/25/2023	Details Edit
Virtual Plat Review Workshop Dec	200	93	0	12/20/2022	12/7/2022	12/18/2022	Details Edit
Notary Chat with Secretary Marshall & Ozie: Fayetteville (in-person)	250	218	0	12/5/2022	11/8/2022	12/6/2022	Details Edit

Figure 19. Event Registration main page

Step 2. Click the **New** navigational link in the top left corner of the screen.



The screenshot shows the 'Event Registration' page with a red arrow pointing to the 'New' link in the sidebar. The sidebar contains 'Event Registration', 'Queue', and 'New' links. The main content area shows the 'Event Registration' title and the 'File Status' dropdown menu.

Figure 20. Click New

Step 3. Clicking **New**, brings you to the **Create Event Registration** page.

The screenshot displays the 'Create Event Registration' page within the 'Soskb Workflow' application. The page is titled 'Create Event Registration' and features a navigation menu with tabs: Details, Location, Speakers, Attendees, Attachments, Questions, and History. On the left side, there is a sidebar with 'Event Registration' selected, and sub-options for 'Queue' and 'New'. The main form is divided into two columns. The left column contains the following fields: 'Event Name', 'Group Title (Must match exactly.)', 'Event Start Date', 'Event Start Time', 'Display From', 'Display To', 'Contact Email', and 'Event Video Link (if needed)'. The right column contains: 'Event Description (this will be posted on our website)', 'Send Fee Receipts To' (dropdown), 'Event Fee', 'Include Sales Tax?' (dropdown), 'Allow payment by check' (dropdown, currently set to 'No'), 'Maximum Attendance', and 'External Registration URL'. At the bottom of the form, there are two buttons: 'Submit Request' and 'Cancel'. The browser's address bar shows the URL 'sosws02/Workflow/IT/EventRegistration/edit'.

Figure 21. Create Event Registration

Step 4. Fill out the entry fields for your event. See **Figure 21**.

Step 5. Click the **Submit Request** button in the bottom left side of the screen.

Step 6. Click on the **Location** tab. See **Figure 22**.

← Not secure | sosws02/Workflow/IT/EventRegistration/edit

Soskb Workflow Budget RISE Business Registration Complaints Facilities Web Portal Information Technology

Event Registration

Queue New

Create Event Registration

Details Location Speakers Attendees Attachments Questions History

Event Location

Address Line 1

Address Line 2 (optional)

City

State

North Carolina

Zipcode

Submit Request Cancel

Figure 22. Location tab

Step 7. Fill out the entry fields with your event’s location details. See **Figure 22**.

Step 8. Click the **Submit Request** button.

Step 9. Click the **Speakers** tab. See **Figure 23**.

← Not secure | sosws02/Workflow/IT/EventRegistration/edit

Soskb Workflow Budget RISE Business Registration Complaints Facilities Web Portal Information Technology Call Center Links

Event Registration

Queue New

Create Event Registration

Details Location Speakers Attendees Attachments Questions History

25 Search:

Speaker	Company	Title	Biography
No data available in table			

Showing 0 to 0 of 0 entries Previous Next

Add Speaker

Submit Request Cancel

© 2023 - Soskb Workflow

Figure 23. Speakers tab

Step 10. Click on the **Attendees** tab.

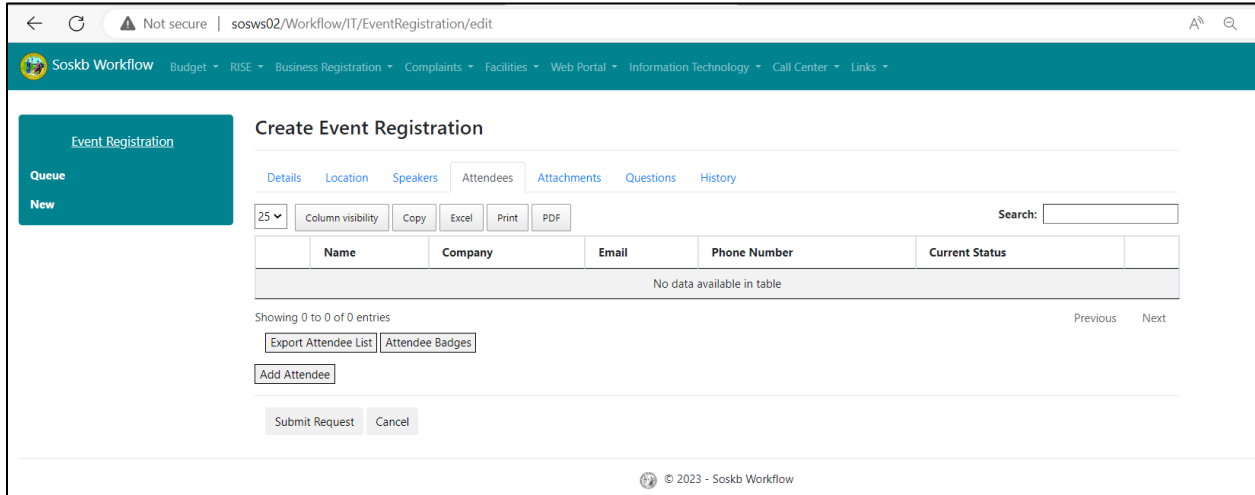


Figure 24. Attendees tab

Step 11. This is where you can add an attendee manually if someone is missing from the attendees list on this tab. Also, you can export the attendee list into an Excel file from here by clicking the **Export Attendee List** and then clicking **Attendee Badges**. See **Figure 25**.

On this tab, you can also print the attendee list by clicking **Print**. You can convert the list to PDF by clicking **PDF**.

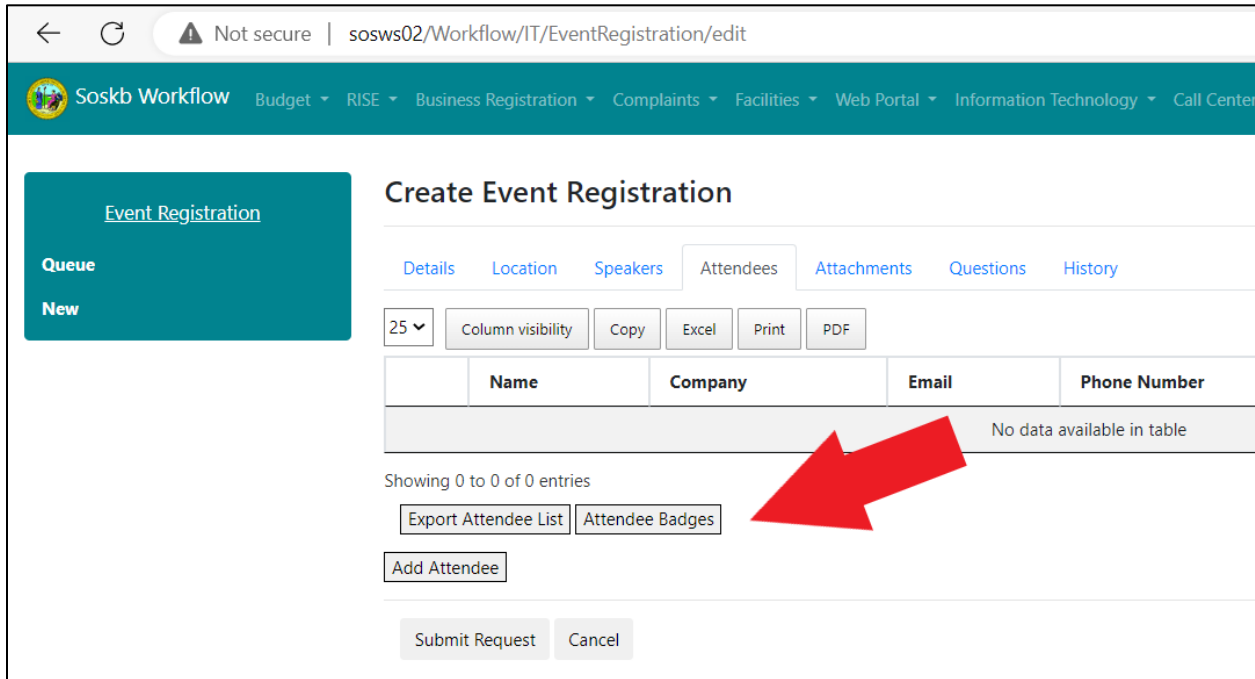


Figure 25. Attendee Export and Badges options

Step 12. Click the **Attachments** tab.

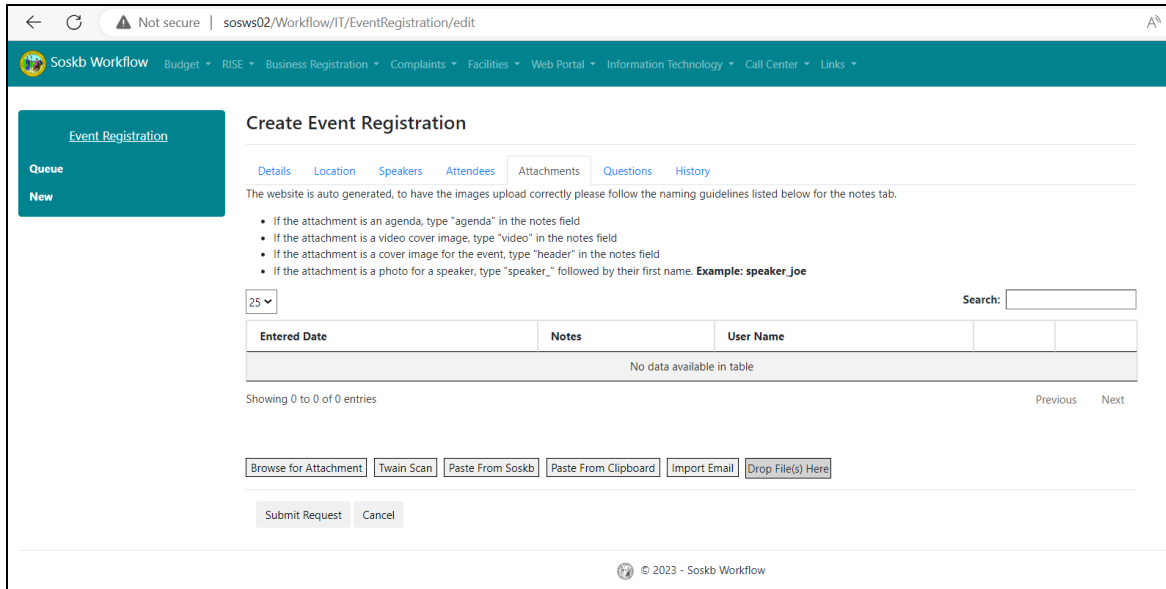


Figure 26. Attachments tab

If you would like to have your own event photo for the preview, this is the place to upload it. To upload the photograph, click the **Drop File(s) Here** button in the lower part of the screen. Type **“header”** in the **Notes** field.

Also, this is the place where you can upload an agenda as a PDF.

To upload a photograph of your speaker, click the **Drop File(s) Here** button and enter the name in the Notes field as **speaker_first name**. For example, **“speaker_Elaine_F._Marshall”**. See **Figure 27**.

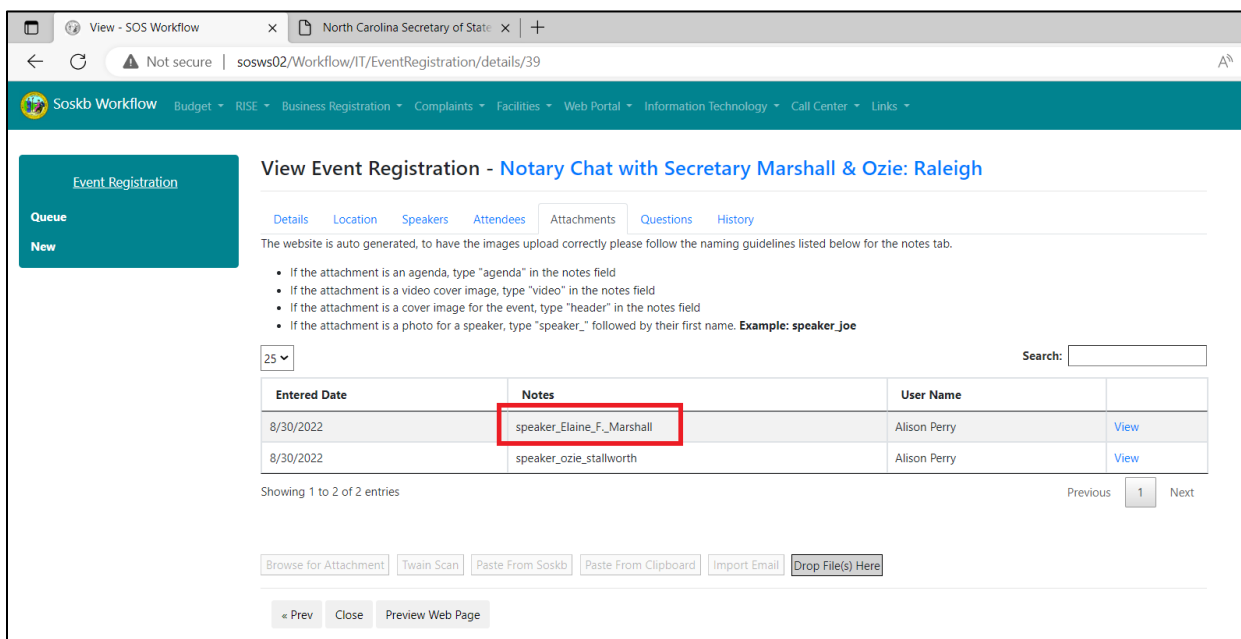


Figure 27. Speaker photo upload

Step 13. Click the **Questions** tab. This is where you can post a question for the registrant as they register for your event. It’s a required question for registration. For instance, you may want to ask if the registrant has food allergies. This would be helpful information if you are planning a luncheon. See **Figure 28**.

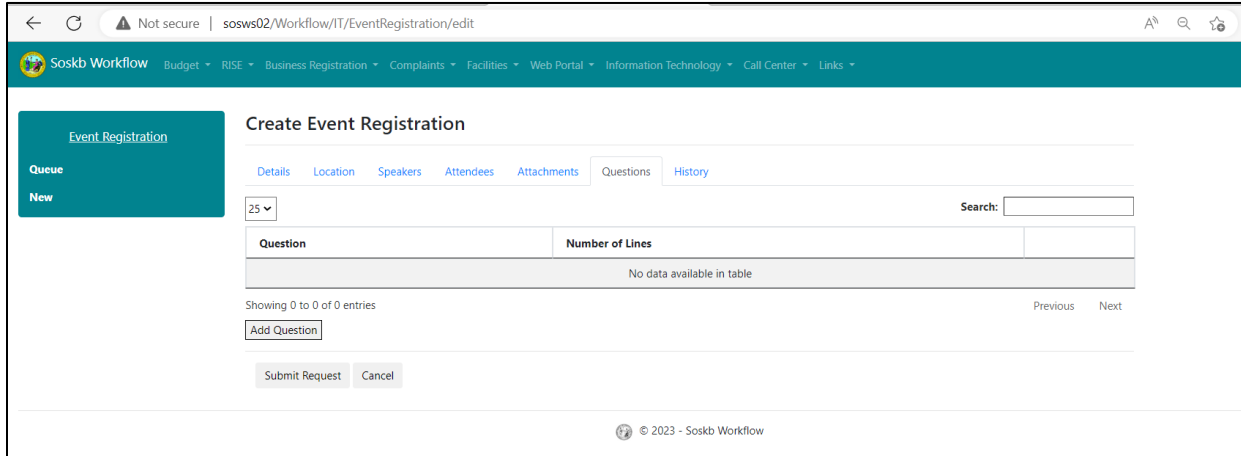


Figure 28. Questions tab

Here is an example of questions for an event. See **Figure 29**.

Question	Number of Lines	
Do you require a vegetarian plate for lunch on April 12th? (yes or no)	1	Edit Remove
We are planning to offer CLE credits for attorneys if approved. Please list your bar number:	2	Edit Remove
Do you have any questions for the speakers? Please list below:	10	Edit Remove

Showing 1 to 3 of 3 entries

Previous 1 Next

Figure 29. Example of an event question

Step 14. Click the **History** tab. Here, you can see updates and actions made for the event.

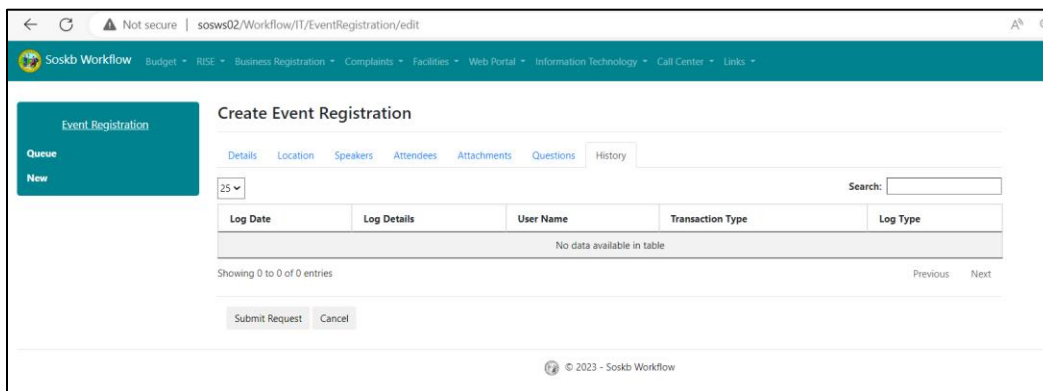


Figure 30. History tab

Here is an example of what you might see in the History tab for a conference:

View Event Registration - [Third Annual Electronic Mortgage Closing Conference](#)

[Details](#) [Location](#) [Speakers](#) [Attendees](#) [Attachments](#) [Questions](#) **History**

25 Search:

Log Date	Log Details	User Name	Transaction Type	Log Type
4/7/2022	Log Details	Nick Macon	WorkAttachment	Edit
4/7/2022	Log Details	Nick Macon	WorkAttachment	New
4/7/2022	Log Details	Nick Macon	WorkAttachment	Delete
4/5/2022	Log Details	Nick Macon	WorkAttachment	Edit
4/5/2022	Log Details	Nick Macon	WorkAttachment	New
4/5/2022	Log Details	Nick Macon	EventRegistrationSpeaker	New
4/5/2022	Log Details	Nick Macon	WorkAttachment	Edit
4/5/2022	Log Details	Nick Macon	WorkAttachment	New

Figure 31. Example of History tab entries

Developer Notes

[SOSKB Workflow](#) is the platform for this program.