SIGNIVENT

Approvals

Signivent · Last updated October 25, 2026

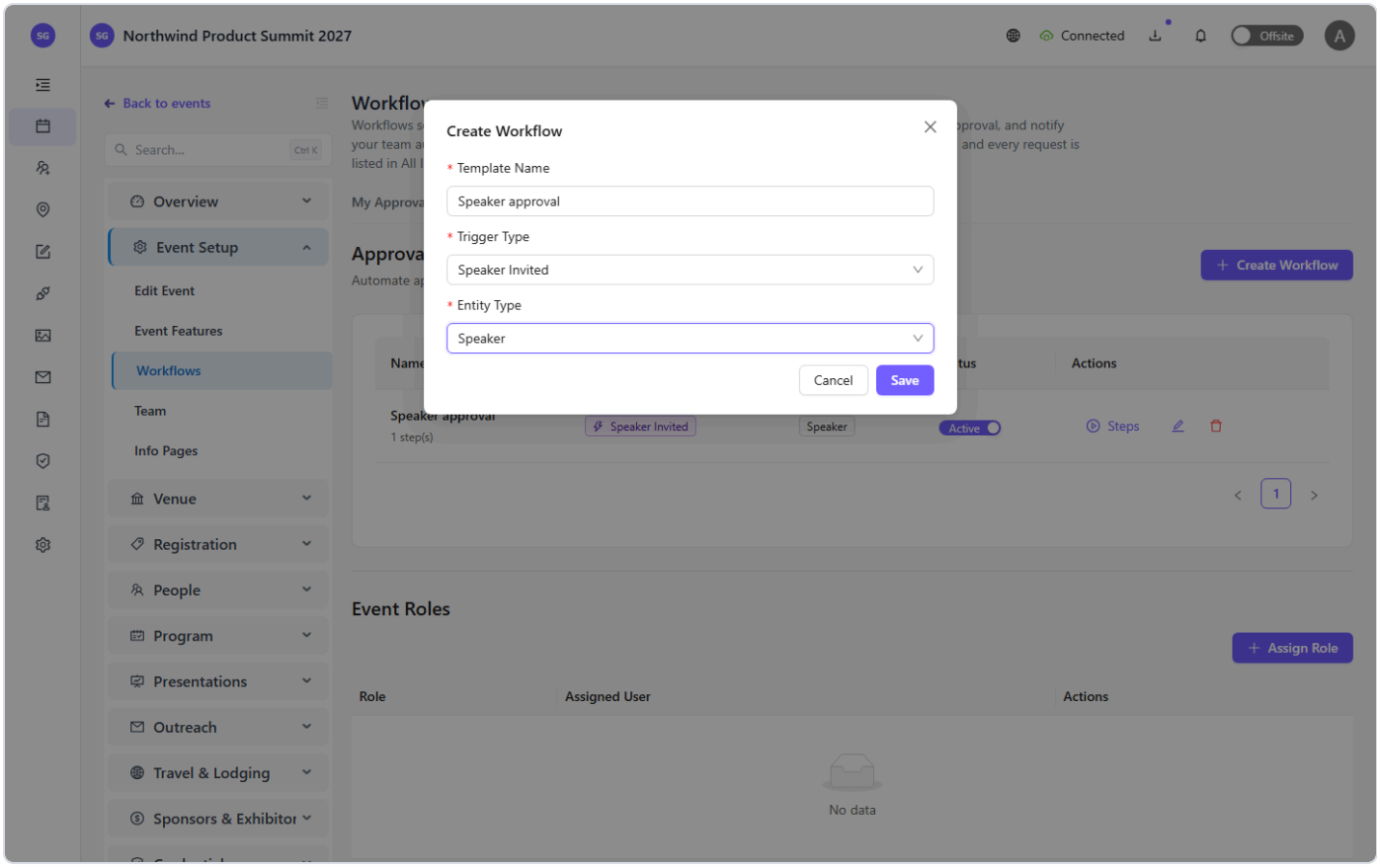
Approvals let a second person sign off on changes before they go ahead, for example a new speaker or a registration. You set up the rules once per event as a **workflow**, under **Event Setup** > **Workflows**. Every request that is waiting on you, from any event, then shows on **Approvals** in the organization sidebar.

Setup at a glance

Step	Where	Required?	What it does
Create a workflow	Event > Event Setup > Workflows > Templates	Required	Says what starts the workflow and what it is about
Add steps	The workflow's **Steps**	Required	Who approves, in what order, and how long they have
Turn it on	The workflow's **Status** switch	Required	New workflows start inactive
Event roles	Templates tab > Event Roles	Optional	Lets a step go to whoever holds a role instead of one email

Create a workflow

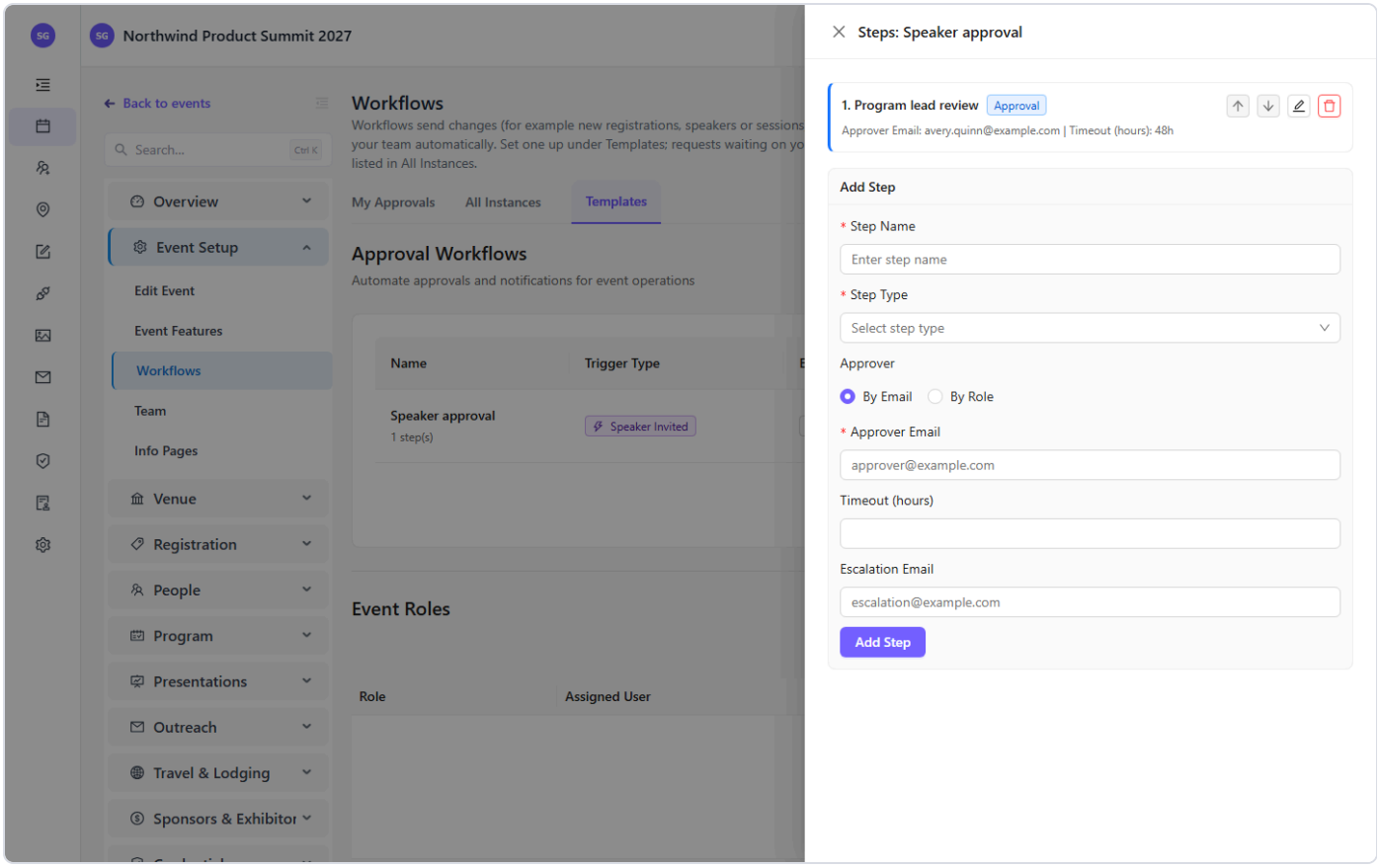
1. Open the event and go to **Event Setup** > **Workflows**, then the **Templates** tab.
2. Click **Create Workflow**.
3. Enter a **Template Name**, then pick the **Trigger Type** (when the workflow starts: Registration Submitted, Housing Requested, Budget Threshold, Speaker Invited, Group Registration, Manual or Webhook) and the **Entity Type** (what it is about: Registration, Session, Speaker, Attendee or Event).
4. Click **Save**.



The Create Workflow form: name Speaker approval, trigger Speaker Invited, entity Speaker

Add the approval steps

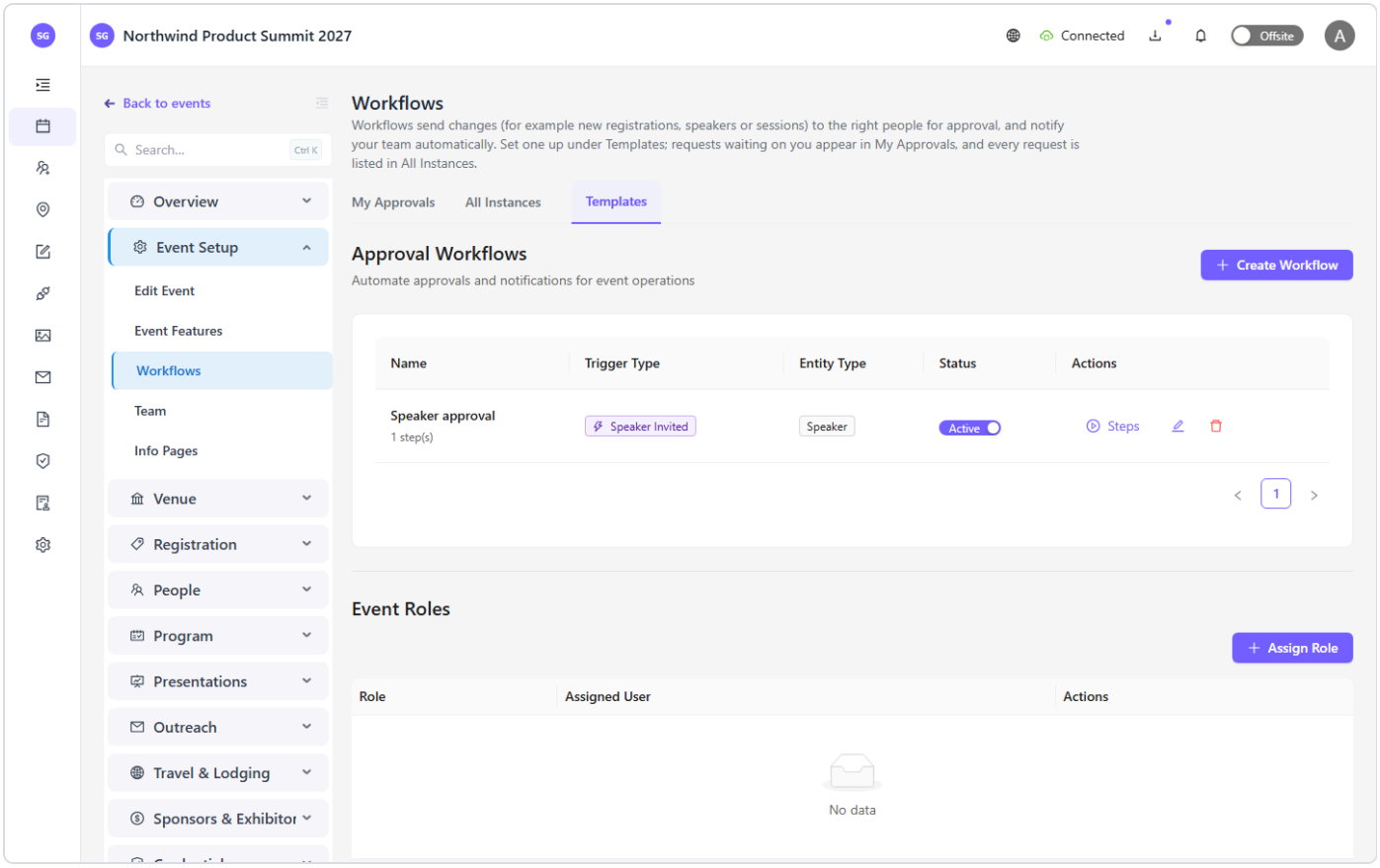
1. On the workflow's row, click **Steps**. A panel opens on the right.
2. Enter a **Step Name** and pick the **Step Type**: **Approval** (someone must approve), **Notification** (someone is told) or **Condition** (a rule decides).
3. Choose the **Approver By Email** (one person) or **By Role** (whoever holds an event role).
4. Set the **Timeout (hours)** and, if you like, an **Escalation Email**: when the approver has not acted in time, the request is escalated and that address is emailed.
5. Click **Add Step**. Add more steps for a chain; the arrows reorder them.



The Steps panel with one approval step: Program lead review, approver by email, 48-hour timeout

Turn the workflow on

New workflows are created **Inactive**. Click the **Status** switch on the row so it reads **Active**. Only active workflows start requests.

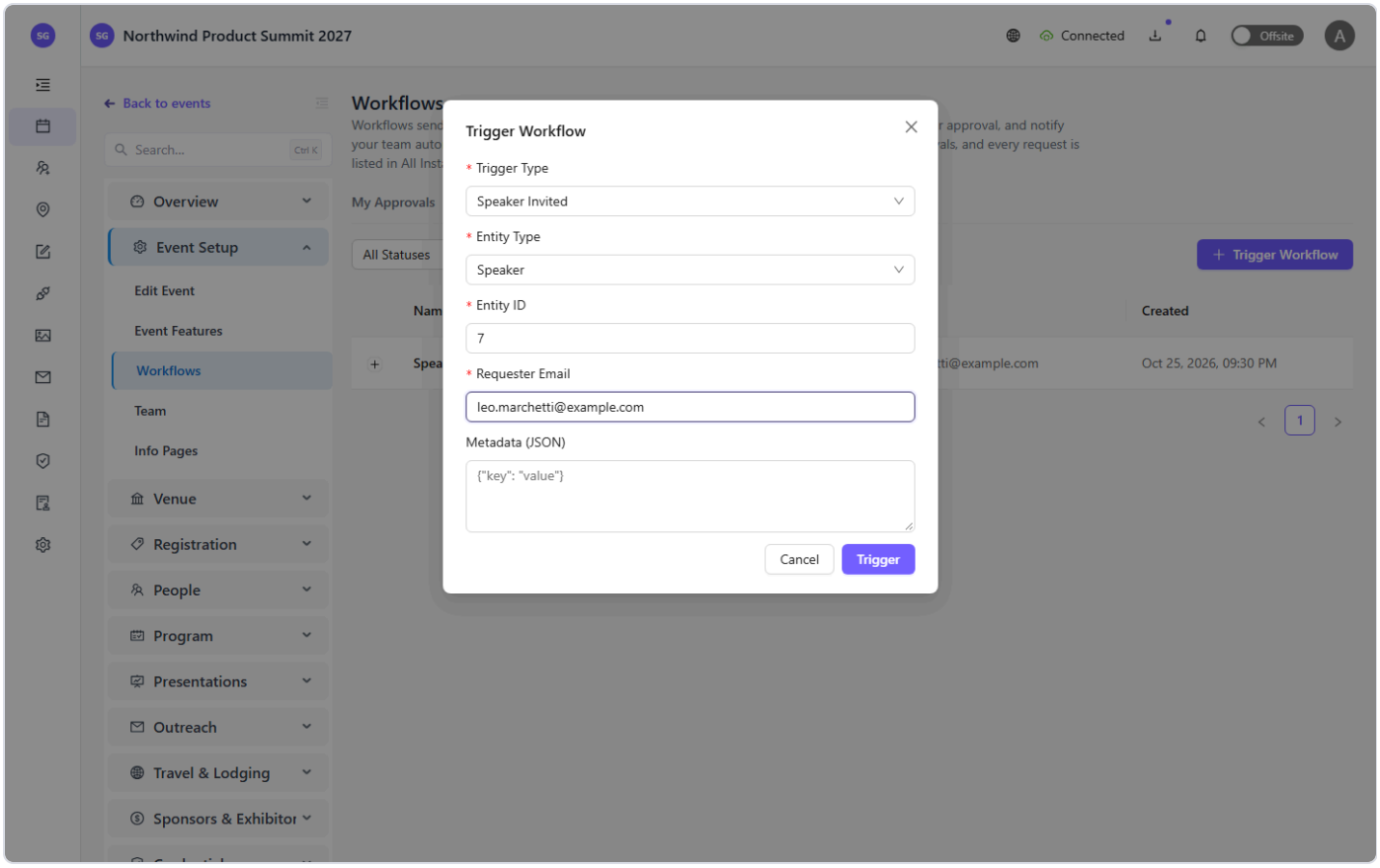


The Templates tab: the Speaker approval workflow, triggered by Speaker Invited, one step, Active

Start a request by hand

Requests normally start on their own when the trigger happens. To test a workflow, or for the **Manual** trigger:

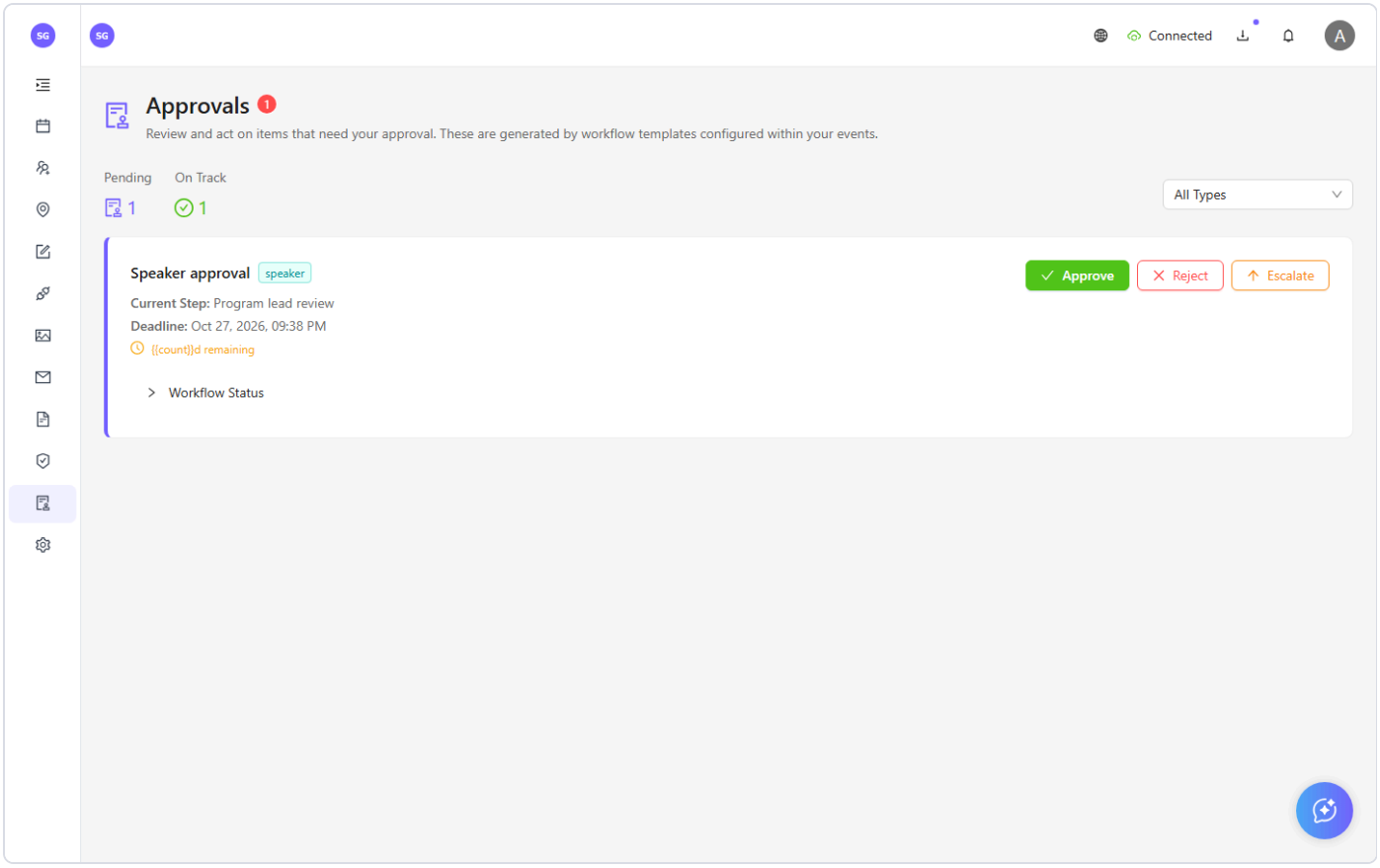
1. Open the **All Instances** tab and click **Trigger Workflow**.
2. Pick the **Trigger Type** and **Entity Type**, enter the **Entity ID** (for a speaker, the number at the end of their profile address) and the **Requester Email**.
3. Click **Trigger**.



The Trigger Workflow form: Speaker Invited, Speaker, entity 7 and the requester's email

Approve, reject or escalate

1. Open **Approvals** in the organization sidebar. A red count next to the title shows how many requests wait on you, and **Pending** and **On Track** sum them up. Use the type filter to narrow the list.
2. Each card shows the workflow, what it is about, the **Current Step** and its **Deadline**. Open **Workflow Status** to see every step.
3. Act on it:
   - **Approve** moves the request to its next step, or finishes it.
   - **Reject** asks for a reason, which is required, and stops the request.
   - **Escalate** marks the request escalated so someone else takes it.

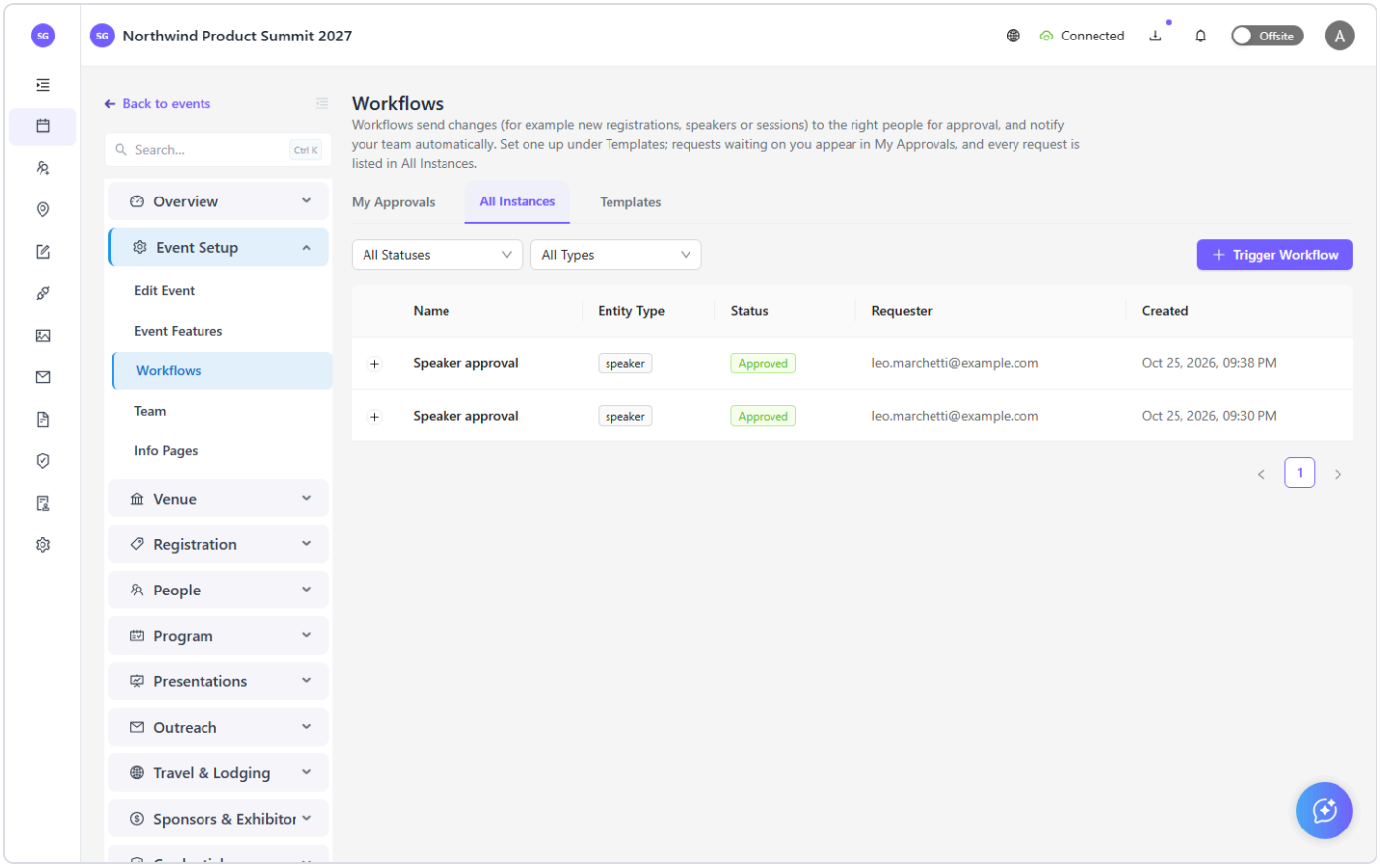


The Approvals page with one request: Speaker approval, current step Program lead review, a deadline, and Approve, Reject and Escalate

The same requests appear on the event's **Workflows** > **My Approvals** tab.

Follow every request

Workflows > **All Instances** lists every request on the event with its status, requester and when it started. Filter by status or type, and click + on a row to see its steps.



All Instances: two Speaker approval requests, both Approved

Status	Meaning	Next action
In Progress	Waiting on the current step's approver	Approve, Reject or Escalate
Approved	Every approval step said yes	None
Rejected	An approver said no, with a reason	Fix the issue and start a new request
Escalated	Escalated by hand or after the step's timeout	The escalation contact follows up

Who can do this

Organization admins and event staff with access to Event Setup create workflows. Anyone named as an approver, by email or through an event role, sees the requests on Approvals.

Troubleshooting

You see	Why	Fix
Nothing reaches Approvals	The workflow is Inactive, has no steps, or the step's approver is someone else	Turn it on, add a step, and check the approver email

You see	Why	Fix
A request that just started is not on Approvals yet	The page can show its last copy for a moment	Reload the page
Reject does nothing	A reason is required	Type the reason, then confirm