

## Inviting participants

Ester Andersson - 2024-10-27 - Getting started

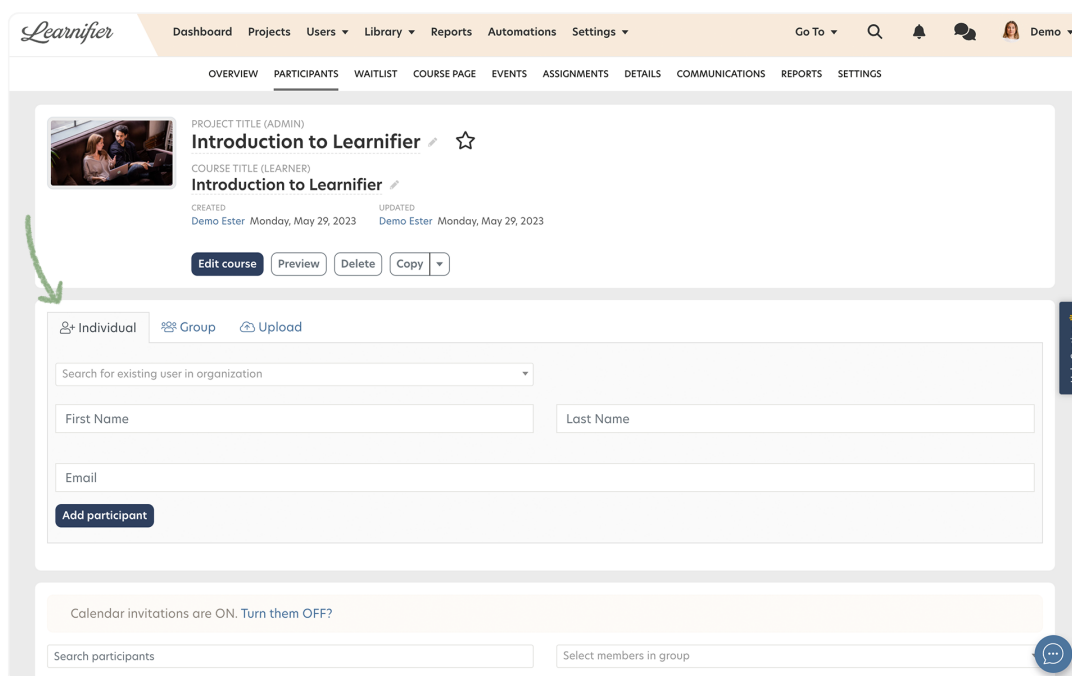
There are several ways to invite participants, and in this article, you'll learn all of them!

Note

- [Manually](#)
- [Via list](#)
- [Self-reg](#)
- [Catalog](#)
- [Automations](#)

### Manually

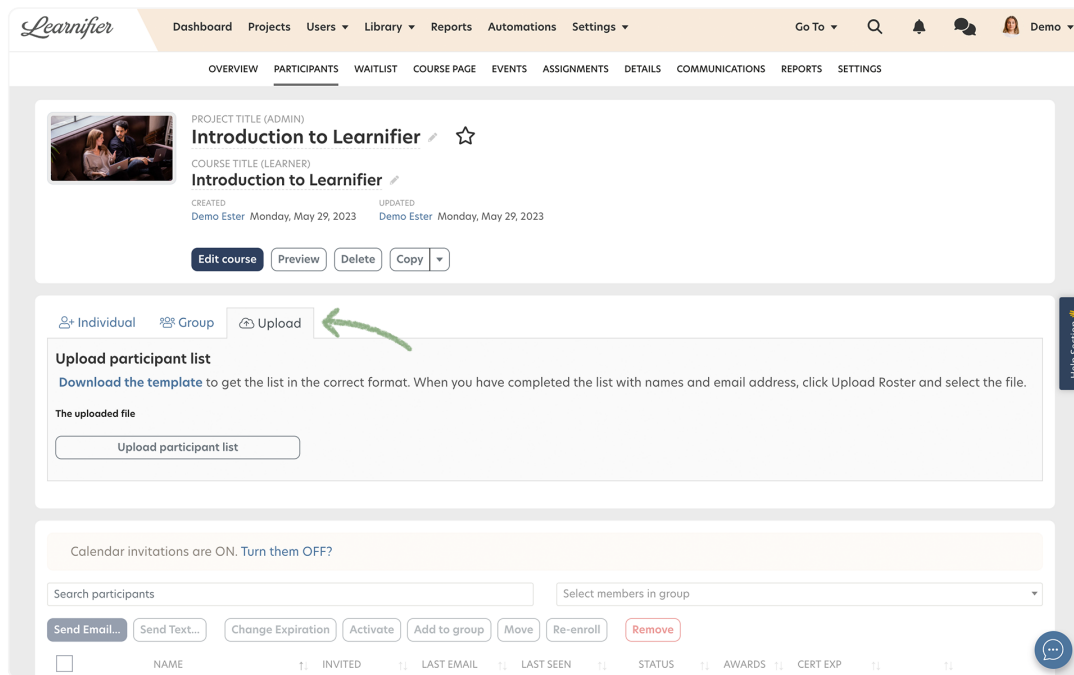
Enter the participant's first name, last name, and email address under "participants" → "individual". Select the participant you wish to invite in the participant list and click "Send email".



### Via list

Download the template that can be found under the "Upload" tab and enter the

participants' information (first name, last name, e-mail address, and telephone number with country code). Click "Upload participant list" and send an invitation email!



The screenshot shows the Learnifier dashboard for a course titled "Introduction to Learnifier". The interface includes a navigation bar with options like Dashboard, Projects, Users, Library, Reports, Automations, and Settings. Below the navigation, there are tabs for OVERVIEW, PARTICIPANTS, WAITLIST, COURSE PAGE, EVENTS, ASSIGNMENTS, DETAILS, COMMUNICATIONS, REPORTS, and SETTINGS. The main content area displays the course title and a "Upload participant list" section. A green arrow points to the "Upload" button in this section. Below the button, there is a search bar and a list of actions: Send Email..., Send Text..., Change Expiration, Activate, Add to group, Move, Re-enroll, and Remove. The bottom of the screen shows a table header with columns: NAME, INVITED, LAST EMAIL, LAST SEEN, STATUS, AWARDS, and CERT EXP.

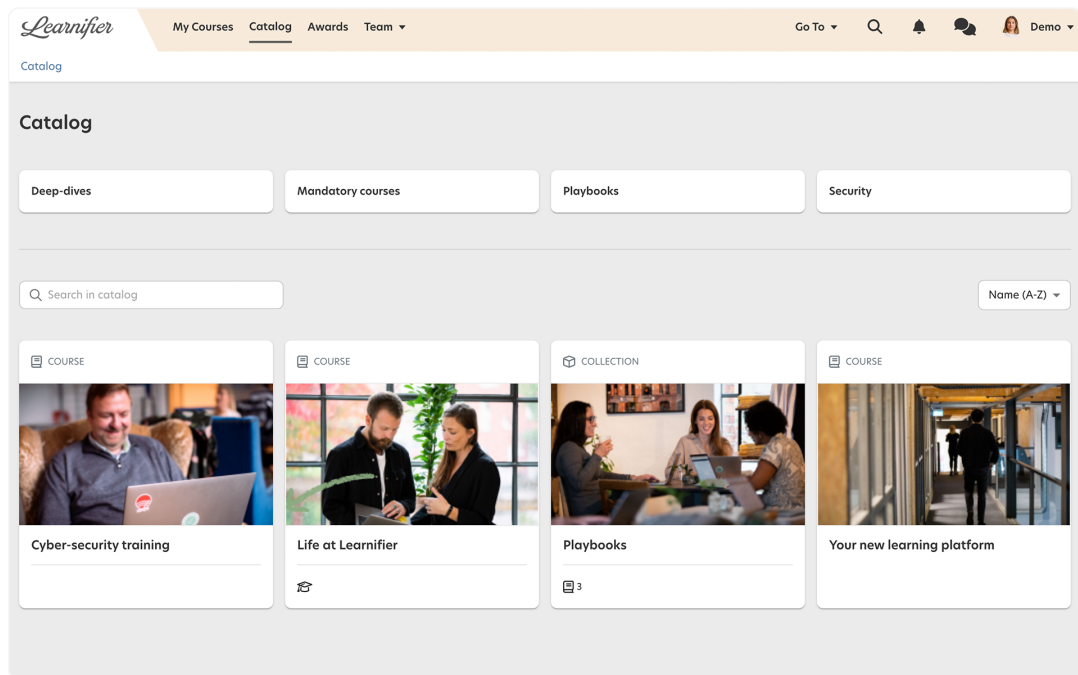
## Self-reg

Participants can also self-register for a course. All you have to do is send them the specific link or QR-code under the "Course Page" tab → "Register". Remember, anyone with the link or code can sign up for the course. You can also brand the self-registration page so it resembles the course. Set an appropriate title and description, as well as a background image, or color by clicking "Edit course page".

Note: you can choose to have your self-registration link moderated. If learners sign up for a moderated course, they will be registered in the course, but not activated. To be notified when a learner signs up, you can set up an [automated communication](#).

## Catalog

In the catalog, participants can easily apply for courses by searching for the course in the catalog and then clicking on "Register now". You decide whether an administrator or team manager needs to approve or if the course should be open for all learners in your learning platform. The catalog is only visible to registered users, which means that a user must have been invited to one of your courses to access the course directory. [Read more here](#) about how to use the catalog.



## Automations

By adding so-called custom fields\*, you can set up a process that automatically enrolls everyone who has the role of "X" (for example "Manager") in a specific course.

Go to the "Automations" tab and click "Add automation". Choose "Normal mode" if only one rule needs to be fulfilled for the enrollment to happen, or "Advanced mode" if several rules need to be fulfilled. On the "Advanced mode", you can also create different rules "in one", by combining "And" and "Or" rules. An example would be that everyone from a company that is either based in Sweden or Norway should be enrolled in a course (see example below)

Automations

NAME  
Everyone at  
Everyone at

**Add automation** [X]

**Name:**  
Everyone at Learnifier gets Brand Guide

**Status:**  
 Live

**Rule:**  
Normal Mode  
The current rule matches 13 users.  
Company = Learnifier

**Actions:**  
Enroll matching users to project  
Learnifier - A Style Guide

Automation  
Actions  
Actions

