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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

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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".

The screenshot shows the Learnifier web application interface. At the top, there's a navigation bar with links like Dashboard, Projects, Users, Library, Reports, Automations, and Settings. Below this, a sub-navigation bar highlights 'PARTICIPANTS'. The main content area displays the course 'Introduction to Learnifier' with a thumbnail image. Underneath, there's a section for adding participants, with tabs for 'Individual', 'Group', and 'Upload'. The 'Individual' tab is selected, and a green arrow points to it. This tab contains a search bar for existing users, and input fields for 'First Name', 'Last Name', and 'Email'. Below these fields is an 'Add participant' button. To the right of the form, there's a vertical 'Help Section' button. At the bottom of the form, there's a note about calendar invitations and a search bar for participants.

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 web application interface. At the top, there is a navigation bar with tabs like Dashboard, Projects, Users, Library, Reports, Automations, and Settings. The main content area is titled 'Introduction to Learnifier' and includes a course description, creation and update dates, and buttons for editing, previewing, deleting, and copying the course. Below this, there is a section for uploading a participant list, with a green arrow pointing to the 'Upload' button. This section includes a link to download a template and a button to upload the file. At the bottom, there is a table with columns for NAME, INVITED, LAST EMAIL, LAST SEEN, STATUS, AWARDS, and CERT EXP, and a row of action buttons like Send Email, Send Text, Change Expiration, Activate, Add to group, Move, Re-enroll, and Remove.

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](#).

Dashboard
Projects
Users
Library
Reports
Automations
Settings

Go To
Search
Notifications
Messages
User Profile (Ester)

OVERVIEW
PARTICIPANTS
WAITLIST
COURSE PAGE
EVENTS
ASSIGNMENTS
DETAILS
COMMUNICATIONS
REPORTS
SETTINGS

Course page

Edit course page

Catalog builder

Show in catalog builder

Registration

Status

Link

https://demo.learnifier.se/a1/catalog/selfreg/v1-2148-3ce113e6fedec2eb?prid=2148

Download

Moderated

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.

My Courses
Catalog
Awards
Team

Go To
Search
Notifications
Messages
User Profile (Demo)

Catalog

Catalog

Deep-dives

Mandatory courses

Playbooks

Security

Search in catalog

Name (A-Z)

COURSE

Cyber-security training

COURSE

Life at Learnifier

COLLECTION

Playbooks

COURSE

Your new learning platform

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)

The screenshot shows the 'Add automation' dialog box in the Learnifier application. The dialog is titled 'Add automation' and has a close button (X) in the top right corner. It contains the following sections:

- Name:** A text input field containing 'Everyone at Learnifier gets Brand Guide'.
- Status:** A toggle switch labeled 'Live' which is currently turned on.
- Rule:**
 - A dropdown menu set to 'Normal Mode'.
 - Text below the dropdown: 'The current rule matches 13 users.'
 - A rule configuration bar showing 'Company' in a dropdown, followed by an equals sign (=) in a dropdown, and 'Learnifier' in a dropdown. There is a close button (X) on the right of this bar.
- Actions:**
 - Text: 'Enroll matching users to project'.
 - A dropdown menu showing 'Learnifier - A Style Guide'.

The background shows the Learnifier dashboard with a sidebar on the left containing 'NAME' and 'Everyone a', and a top navigation bar with 'Dashboard', 'Projects', 'Users', 'Library', 'Reports', 'Automations', and 'Settings'. The top right of the dashboard has 'Go To', a search icon, a bell icon, a chat icon, and a 'Demo' user profile.