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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!

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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 the Learnifier logo and various menu items: Dashboard, Projects, Users, Library, Reports, Automations, and Settings. Below this is a sub-navigation bar with tabs: OVERVIEW, PARTICIPANTS (selected), WAITLIST, COURSE PAGE, EVENTS, ASSIGNMENTS, DETAILS, COMMUNICATIONS, REPORTS, and SETTINGS. The main content area displays the course details for 'Introduction to Learnifier'. It includes a course image, the project title (ADMIN), the course title (LEARNER), and the course name 'Introduction to Learnifier'. Below this, it shows the creation and update dates: 'Demo Ester Monday, May 29, 2023'. There are buttons for 'Edit course', 'Preview', 'Delete', and 'Copy'. A green arrow points to the 'Individual' tab in the 'Add participant' section. This section has three tabs: 'Individual' (selected), 'Group', and 'Upload'. The 'Individual' tab contains a search field 'Search for existing user in organization', and input fields for 'First Name', 'Last Name', and 'Email'. At the bottom of this section is an 'Add participant' button. Below the 'Add participant' section, there's a message: 'Calendar invitations are ON. Turn them OFF?'. At the very bottom, there's a search bar 'Search participants' and a button 'Select members in group'. A 'Help Section' button is located on the right side of the interface.

### 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. The top navigation bar includes the Learnifier logo and menu items: Dashboard, Projects, Users, Library, Reports, Automations, and Settings. A secondary navigation bar shows tabs: OVERVIEW, PARTICIPANTS (selected), WAITLIST, COURSE PAGE, EVENTS, ASSIGNMENTS, DETAILS, COMMUNICATIONS, REPORTS, and SETTINGS. The main content area displays course information for 'Introduction to Learnifier', including project and course titles, creation and update dates, and buttons for 'Edit course', 'Preview', 'Delete', and 'Copy'. Below this, there are tabs for 'Individual', 'Group', and 'Upload', with a green arrow pointing to the 'Upload' tab. The 'Upload participant list' section includes instructions to download a template and a button labeled 'Upload participant list'. At the bottom, a status bar indicates 'Calendar invitations are ON. Turn them OFF?' and a search bar for participants. A table header is visible with columns: NAME, INVITED, LAST EMAIL, LAST SEEN, STATUS, AWARDS, CERT EXP, and a table action menu.

## 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: Ester

OVERVIEW PARTICIPANTS WAITLIST **COURSE PAGE** EVENTS ASSIGNMENTS DETAILS COMMUNICATIONS REPORTS SETTINGS

### Course page

Edit course page

### Catalog builder

Show in catalog builder ☒ On

### Registration

Status ☒ On

Link

Download

Moderated ☐ Off

## 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 Demo

Catalog

Deep-dives

Mandatory courses

Playbooks

Security

Name (A-Z)

COURSE

Cyber-security training

COURSE

Life at Learnifier

COLLECTION

Playbooks

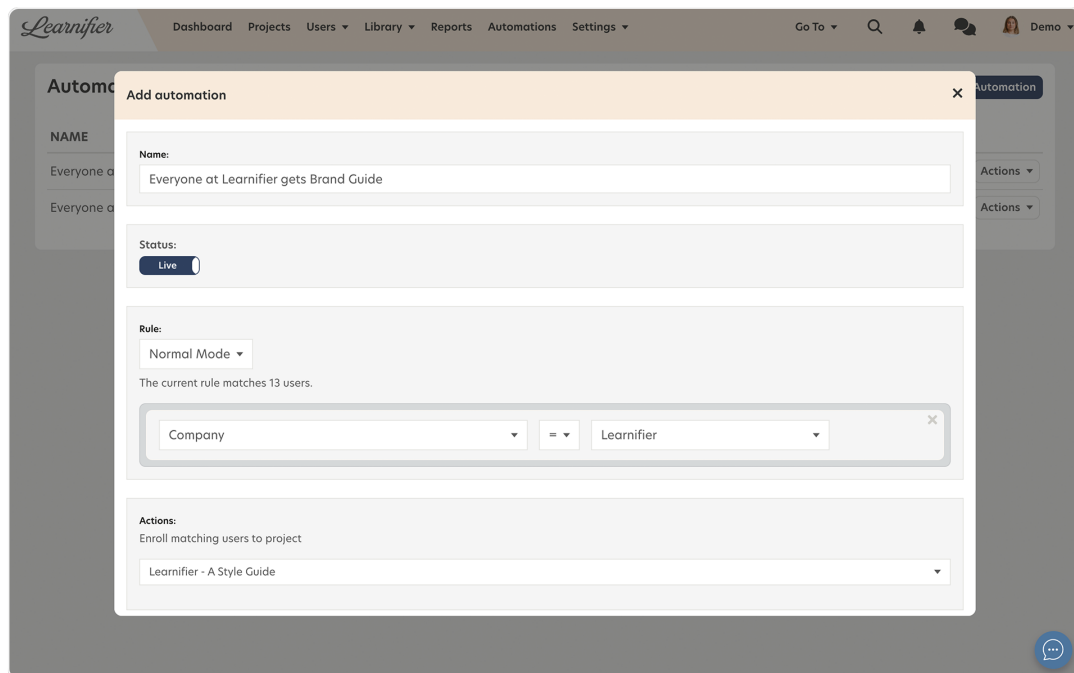
COURSE

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' modal in the Learnifier application. The modal is titled 'Add automation' and has a close button (X) in the top right corner. It contains the following fields and options:

- Name:** A text input field with the value 'Everyone at Learnifier gets Brand Guide'.
- Status:** A toggle switch labeled 'Live'.
- Rule:** A dropdown menu set to 'Normal Mode'. Below it, a message states 'The current rule matches 13 users.' Below this is a rule builder interface with a dropdown set to 'Company', an equals sign, and another dropdown set to 'Learnifier'.
- Actions:** A section titled 'Enroll matching users to project' with a dropdown menu set to 'Learnifier - A Style Guide'.

The background shows the Learnifier dashboard with a navigation bar containing 'Dashboard', 'Projects', 'Users', 'Library', 'Reports', 'Automations', and 'Settings'. The 'Automations' tab is active. A sidebar on the left shows a list of automation rules, and a right sidebar shows 'Automation' and 'Actions'.