



[Knowledge base](#) > [Getting started](#) > [Inviting participants](#)

Inviting participants

Ester Andersson - 2024-10-27 - [Getting started](#)

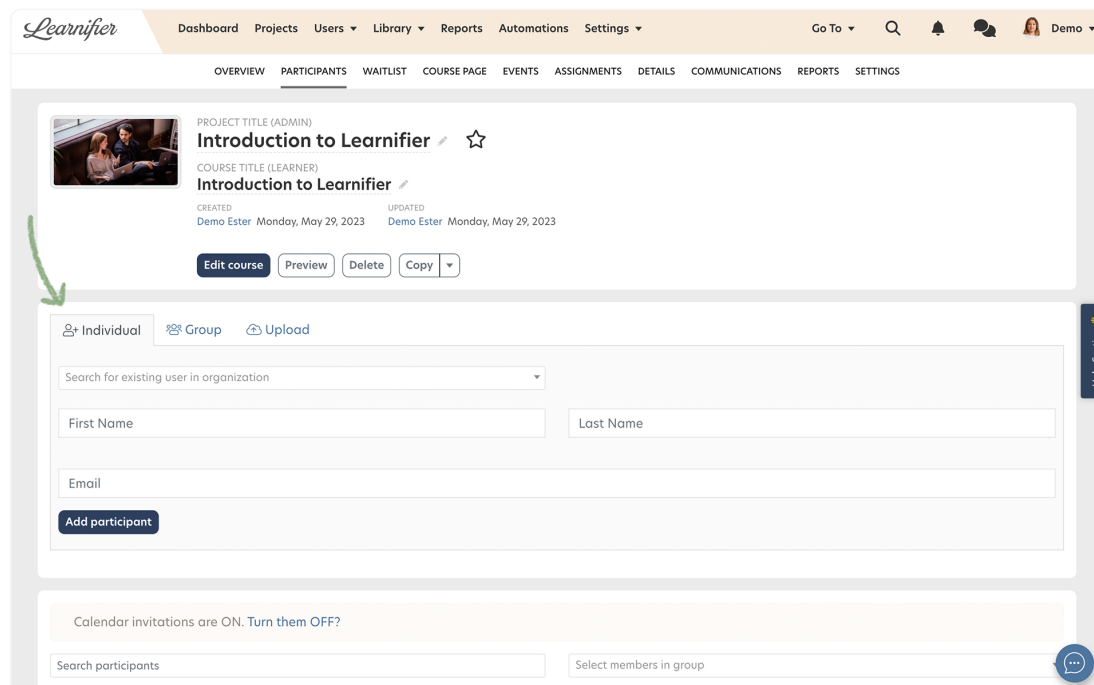
There are several ways to invite participants, and in this article, you'll learn all of them!

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 top navigation bar includes "Dashboard", "Projects", "Users", "Library", "Reports", "Automations", and "Settings". The main navigation bar has tabs for "OVERVIEW", "PARTICIPANTS", "WAITLIST", "COURSE PAGE", "EVENTS", "ASSIGNMENTS", "DETAILS", "COMMUNICATIONS", "REPORTS", and "SETTINGS". The course details section shows the project title "Introduction to Learnifier" and the course title "Introduction to Learnifier", both created and updated by "Demo Ester" on "Monday, May 29, 2023". Below this are buttons for "Edit course", "Preview", "Delete", and "Copy".

The "PARTICIPANTS" tab is active, and the "Upload" option is highlighted with a green arrow. The "Upload participant list" section includes a "Download the template" link and a text box for "The uploaded file" with a button labeled "Upload participant list".

Below the upload section, there is a notification: "Calendar invitations are ON. Turn them OFF?". A search bar for participants and a dropdown for "Select members in group" are also visible. At the bottom, there is a table with columns: NAME, INVITED, LAST EMAIL, LAST SEEN, STATUS, AWARDS, and CERT EXP. Action buttons like "Send Email...", "Send Text...", "Change Expiration", "Activate", "Add to group", "Move", "Re-enroll", and "Remove" are positioned above the table.

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](#).

LEARNIFIER Dashboard Projects Users Library Reports Automations Settings Go To Q 2 1 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.

Learnifier My Courses **Catalog** Awards Team Go To Q 1 Demo

Catalog

Deep-dives Mandatory courses Playbooks Security

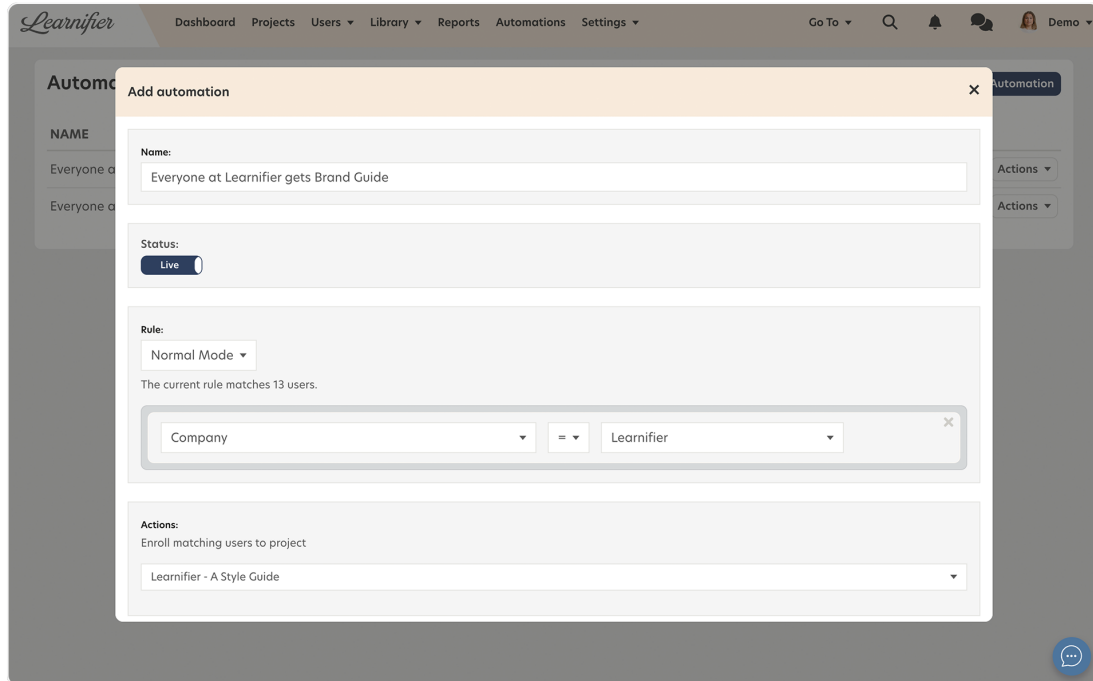
Q Search in catalog Name (A-Z)

<p>COURSE</p>  <p>Cyber-security training</p>	<p>COURSE</p>  <p>Life at Learnifier</p> 	<p>COLLECTION</p>  <p>Playbooks</p> 	<p>COURSE</p>  <p>Your new learning platform</p>
--	---	---	---

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 interface. The dialog is titled 'Add automation' and has a close button (X) in the top right corner. It is divided into several 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'. Below it, a message states 'The current rule matches 13 users.' Below this is a rule configuration bar showing 'Company' in a dropdown, followed by an equals sign (=) in a dropdown, and 'Learnifier' in another dropdown. There is a close button (X) on the right of this bar.
- Actions:** A section titled 'Enroll matching users to project' with a dropdown menu showing 'Learnifier - A Style Guide'.

The background shows the Learnifier dashboard with navigation tabs: Dashboard, Projects, Users, Library, Reports, Automations, and Settings. The user is logged in as 'Demo'.