

Inviting participants

Ester Andersson - 2024-10-27 - Getting started

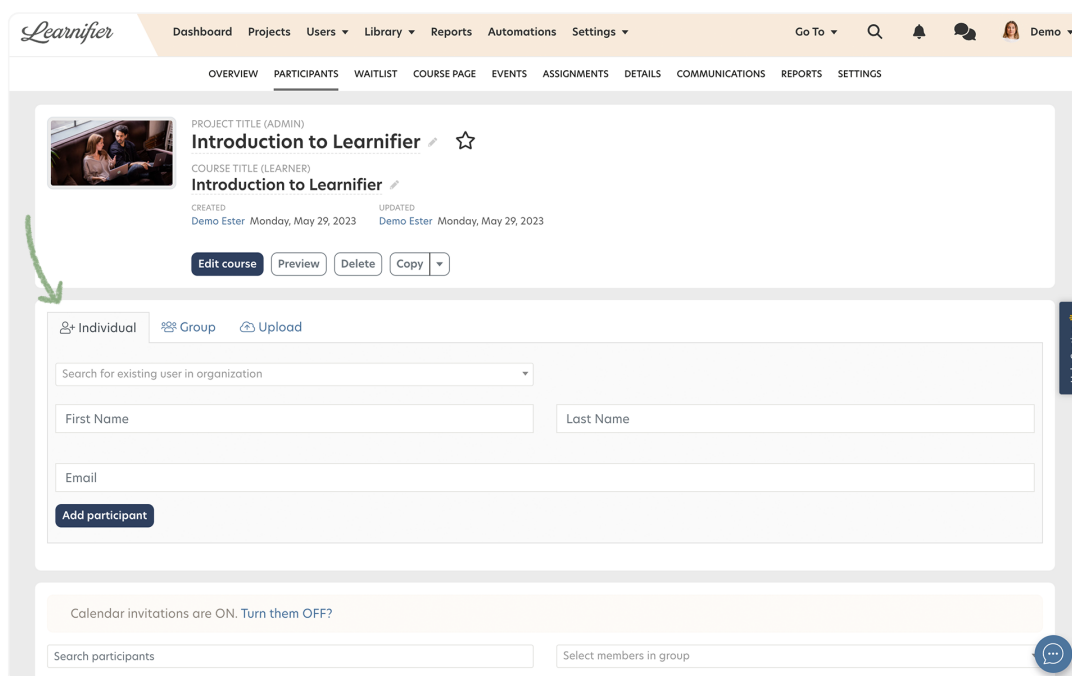
There are several ways to invite participants, and in this article, you'll learn all of them!

Note

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Manually

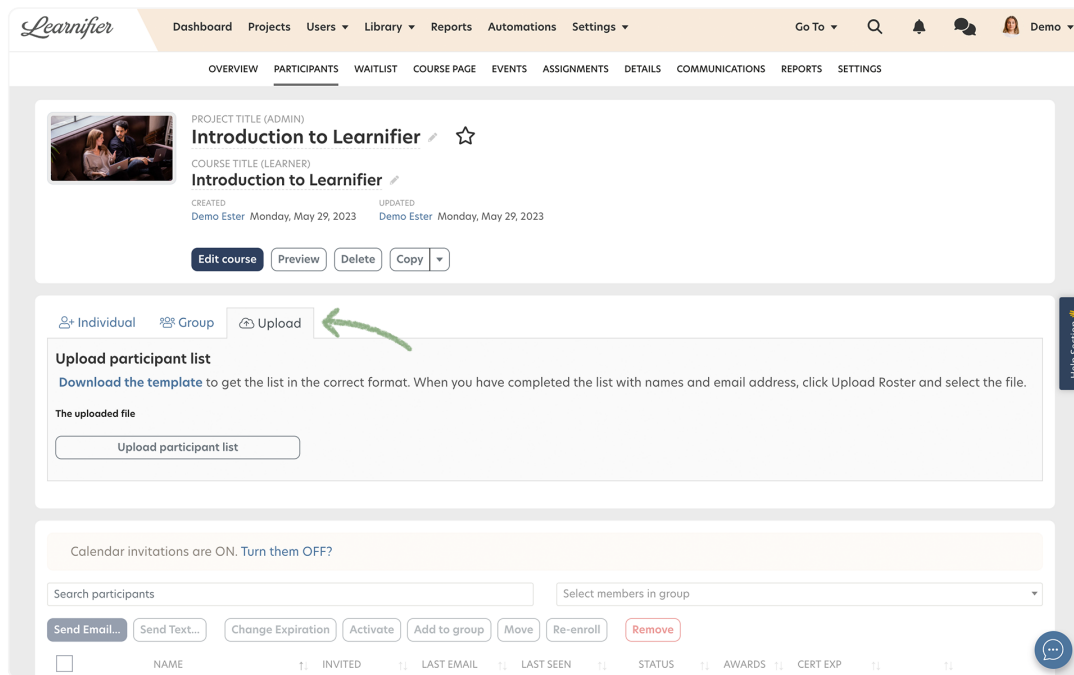
Enter the participant's first name, last name, and email address under "participants" → "individual". Select the participant you wish to invite in the participant list and click "Send email".



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 displays the Learnifier web application interface. At the top, there is a navigation bar with the Learnifier logo and menu items: Dashboard, Projects, Users, Library, Reports, Automations, and Settings. A secondary navigation bar includes tabs for OVERVIEW, PARTICIPANTS (selected), WAITLIST, COURSE PAGE, EVENTS, ASSIGNMENTS, DETAILS, COMMUNICATIONS, REPORTS, and SETTINGS. The main content area shows course details for 'Introduction to Learnifier', including project and course titles, creation and update dates, and action buttons like '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 provides instructions to download a template and upload a roster file, with an 'Upload participant list' button. A yellow banner indicates 'Calendar invitations are ON. Turn them OFF?'. At the bottom, there is a search bar for participants and a table 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](#).

LEARNIFIER 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 [Copy](#)



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 Search Notifications Messages Demo

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 in the Learnifier interface. 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". Below it, a message states "The current rule matches 13 users." Below this message is a rule configuration bar with a dropdown menu showing "Company", an equals sign (=), and another dropdown menu showing "Learnifier".
- Actions:** A section titled "Enroll matching users to project" with a dropdown menu showing "Learnifier - A Style Guide".