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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 'Dashboard', 'Projects', 'Users', 'Library', 'Reports', 'Automations', and 'Settings'. Below this is a sub-navigation bar with 'OVERVIEW', 'PARTICIPANTS', 'WAITLIST', 'COURSE PAGE', 'EVENTS', 'ASSIGNMENTS', 'DETAILS', 'COMMUNICATIONS', 'REPORTS', and 'SETTINGS'. The main content area displays the 'Introduction to Learnifier' course page. A green arrow points to the 'Individual' tab in the 'Participants' section. The form includes fields for 'First Name', 'Last Name', and 'Email', and an 'Add participant' button. A 'Help Section' button is visible 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!

Learnifier

Dashboard Projects Users Library Reports Automations Settings

Go To 🔍 🔔 🗨️ 👤 Demo

OVERVIEW PARTICIPANTS WAITLIST COURSE PAGE EVENTS ASSIGNMENTS DETAILS COMMUNICATIONS REPORTS SETTINGS

PROJECT TITLE (ADMIN)  
**Introduction to Learnifier** ⚙️ ☆

COURSE TITLE (LEARNER)  
**Introduction to Learnifier** ⚙️

CREATED: Demo Ester Monday, May 29, 2023 UPDATED: Demo Ester Monday, May 29, 2023

Edit course Preview Delete Copy

Individual Group Upload

**Upload participant list**

Download the template to get the list in the correct format. When you have completed the list with names and email address, click Upload Roster and select the file.

The uploaded file

Upload participant list

Calendar invitations are ON. [Turn them OFF?](#)

Search participants Select members in group

Send Email... Send Text... Change Expiration Activate Add to group Move Re-enroll Remove

NAME INVITED LAST EMAIL LAST SEEN STATUS AWARDS 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](#).

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

On

Registration

Status

On

Link

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

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
User Profile (Demo)

Catalog

Deep-dives
Mandatory courses
Playbooks
Security

Search in catalog
Name (A-Z)

COURSE

Cyber-security training

COURSE

Life at Learnifier

COLLECTION

Playbooks
3

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 fields and options:

- 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 builder interface with a dropdown set to 'Company', an equals sign, and another dropdown set to 'Learnifier'. There is a close button (X) on the right of the rule builder.
- 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 sidebar on the left containing 'NAME' and 'Everyone a' (repeated). The top navigation bar includes 'Dashboard', 'Projects', 'Users', 'Library', 'Reports', 'Automations', and 'Settings'. The top right corner has a 'Go To' dropdown, a search icon, a bell icon, a chat icon, and a 'Demo' dropdown. A blue chat bubble icon is visible in the bottom right corner of the dashboard.