

## Inviting participants

Ester Andersson - 2024-07-15 - Getting started

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

Note

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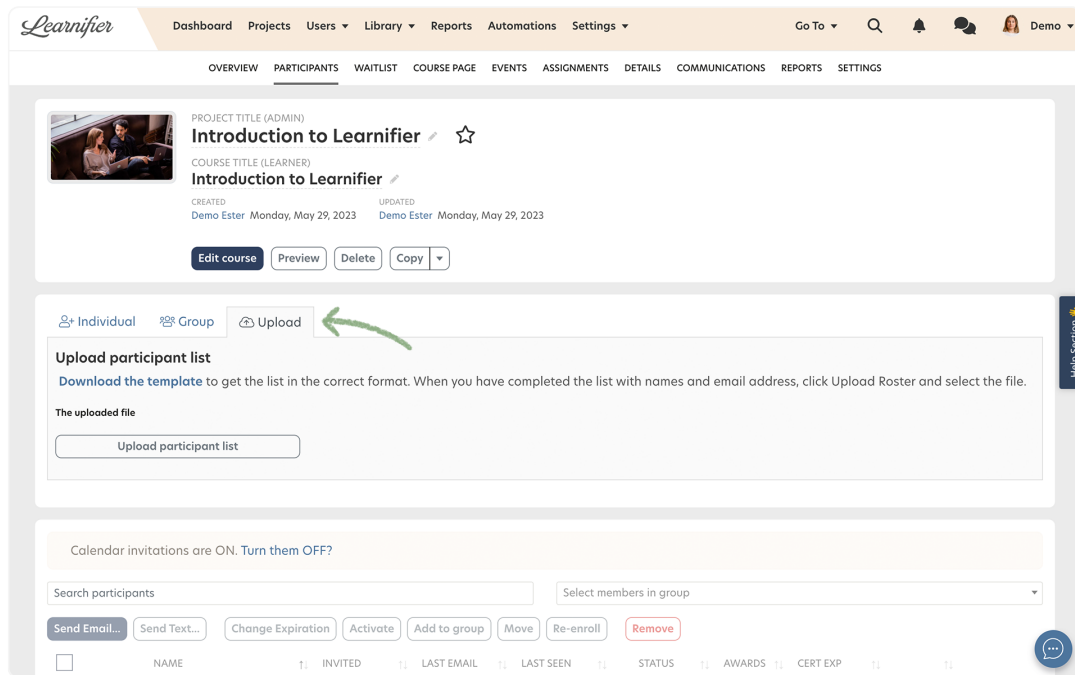
### Manually

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 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. On the right side of the top bar, there are icons for 'Go To', search, notifications, chat, and a user profile labeled 'Demo'. Below the top bar is a secondary navigation bar with tabs: OVERVIEW, PARTICIPANTS (selected), WAITLIST, COURSE PAGE, EVENTS, ASSIGNMENTS, DETAILS, COMMUNICATIONS, REPORTS, and SETTINGS. The main content area shows the course details for 'Introduction to Learnifier'. It includes a project title (ADMIN) and a course title (LEARNER), both 'Introduction to Learnifier'. Below the titles, it shows the creator 'Demo Ester' and the creation date 'Monday, May 29, 2023'. There are buttons for 'Edit course', 'Preview', 'Delete', and 'Copy'. A green arrow points to the 'Individual' sub-tab in the 'PARTICIPANTS' section. Below the sub-tabs, there is a search field for existing users and input fields for 'First Name', 'Last Name', and 'Email'. An 'Add participant' button is located at the bottom of the form. At the bottom of the page, there is a section for 'Calendar invitations are ON. Turn them OFF?' and a search field 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 interface. At the top, there is a navigation bar with the Learnifier logo and various menu items: Dashboard, Projects, Users, Library, Reports, Automations, Settings, Go To, a search icon, a notification bell, a chat icon, and a user profile icon labeled 'Demo'. Below the navigation bar, there 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 course information for 'Introduction to Learnifier'. It includes a project title (ADMIN) and a course title (LEARNER), both 'Introduction to Learnifier'. It also shows creation and update dates by 'Demo Ester' on Monday, May 29, 2023. Below this, there are buttons for 'Edit course', 'Preview', 'Delete', and 'Copy'. A green arrow points to the 'Upload' tab in the sub-navigation bar. The 'Upload participant list' section is active, showing instructions to download a template and upload a roster. Below the instructions, there is a button labeled 'Upload participant list'. At the bottom, there is a section for 'Calendar invitations are ON. Turn them OFF?' with a search bar for participants and a dropdown for 'Select members in group'. Below these are several action buttons: 'Send Email...', 'Send Text...', 'Change Expiration', 'Activate', 'Add to group', 'Move', 'Re-enroll', and 'Remove'. At the very bottom, there is a table header 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 you find under the "Course Page" tab → "Register". Remember, anyone who has the link 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”.

The screenshot shows the 'Introduction to Learnifier' course page. At the top, there's a navigation bar with 'Learnifier' logo and menu items: Dashboard, Projects, Users, Library, Reports, Automations, Settings. Below that, a sub-navigation bar includes Overview, Participants, Waitlist, Course Page (active), Events, Assignments, Details, Communications, Reports, and Settings. The main content area shows the course title 'Introduction to Learnifier' with a pencil icon for editing. It also displays 'CREATED' and 'UPDATED' dates: 'Demo Ester Monday, May 29, 2023'. Below this are buttons for 'Edit course', 'Preview', 'Delete', and 'Copy'. A 'Course page' section has an 'Edit course page' button. The 'Catalog builder' section has a 'Show in catalog builder' toggle set to 'Off'. The 'Registration' section has a 'Status' toggle set to 'On', with a green arrow pointing to it. At the bottom, there's a 'Link' field containing the URL: 'https://demo.learnifier.se/a1/catalog/session/5045fd8b-1327-46d8-914c-eb14e1ea4387?prid=8354'.

## Catalog

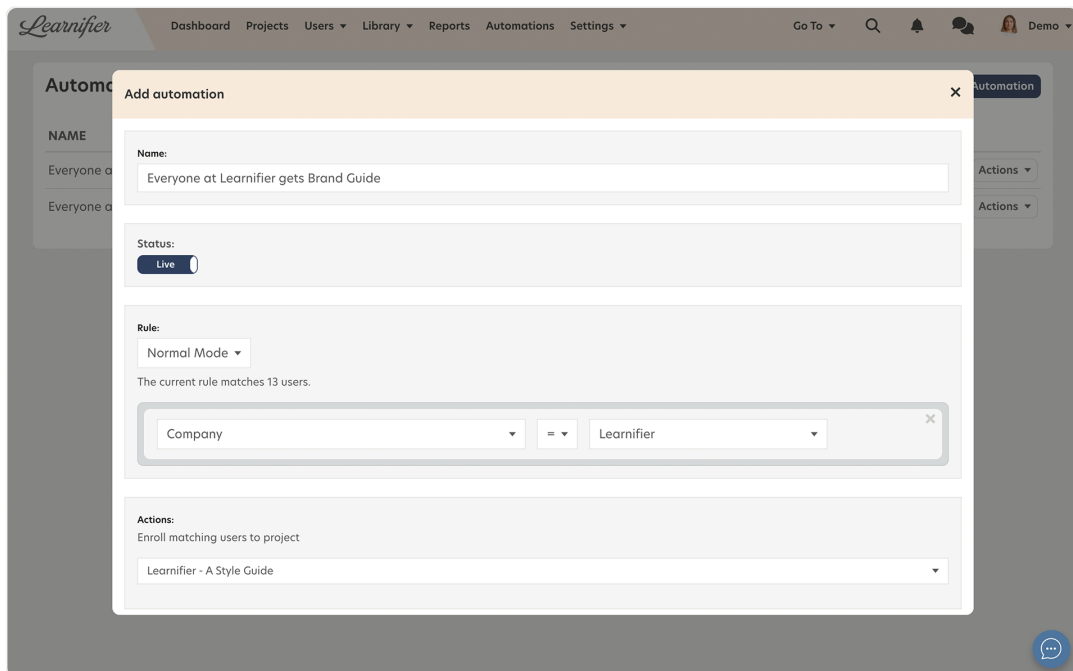
In the catalog, participants can easily apply for courses by searching for the course in the catalog and then clicking on "Register now". You decide whether an administrator or team manager needs to approve or if the course should be open for all learners in your learning platform. The catalog is only 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.

The screenshot shows the 'Catalog' page in Learnifier. The top navigation bar includes 'Learnifier' logo and menu items: My Courses, Catalog (active), Awards, Team. Below that, a sub-navigation bar shows 'Catalog'. The main content area is titled 'Catalog' and features four filter buttons: 'Deep-dives', 'Mandatory courses', 'Playbooks', and 'Security'. Below the filters is a search bar labeled 'Search in catalog' and a dropdown menu for 'Name (A-Z)'. The main content area displays four course cards: 'Cyber-security training' (Course), 'Life at Learnifier' (Course), 'Playbooks' (Collection), and 'Your new learning platform' (Course). Each card includes a representative image and a title.

## 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)



## Related Content

- [Automated communication](#)