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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 interface for a course titled "Introduction to Learnifier". The course is managed by "Demo Ester" and was created on Monday, May 29, 2023. The interface includes a navigation bar with options like Dashboard, Projects, Users, Library, Reports, Automations, and Settings. Below the navigation bar, there are tabs for Overview, Participants, Waitlist, Course Page, Events, Assignments, Details, Communications, Reports, and Settings. The "Participants" tab is active, and the "Individual" sub-tab is selected. The form for adding a participant includes 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. A green arrow points to the "Individual" tab, and the "Add participant" button is highlighted.

### 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, showing options for "Individual", "Group", and "Upload". A green arrow points to the "Upload" button. Below this is the "Upload participant list" section, which includes a "Download the template" link and a "The uploaded file" section with a button labeled "Upload participant list".

At the bottom, there is a notification: "Calendar invitations are ON. Turn them OFF?". Below this is a search bar for participants and a dropdown menu for "Select members in group". A row of action buttons includes "Send Email...", "Send Text...", "Change Expiration", "Activate", "Add to group", "Move", "Re-enroll", and "Remove". Below these 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 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

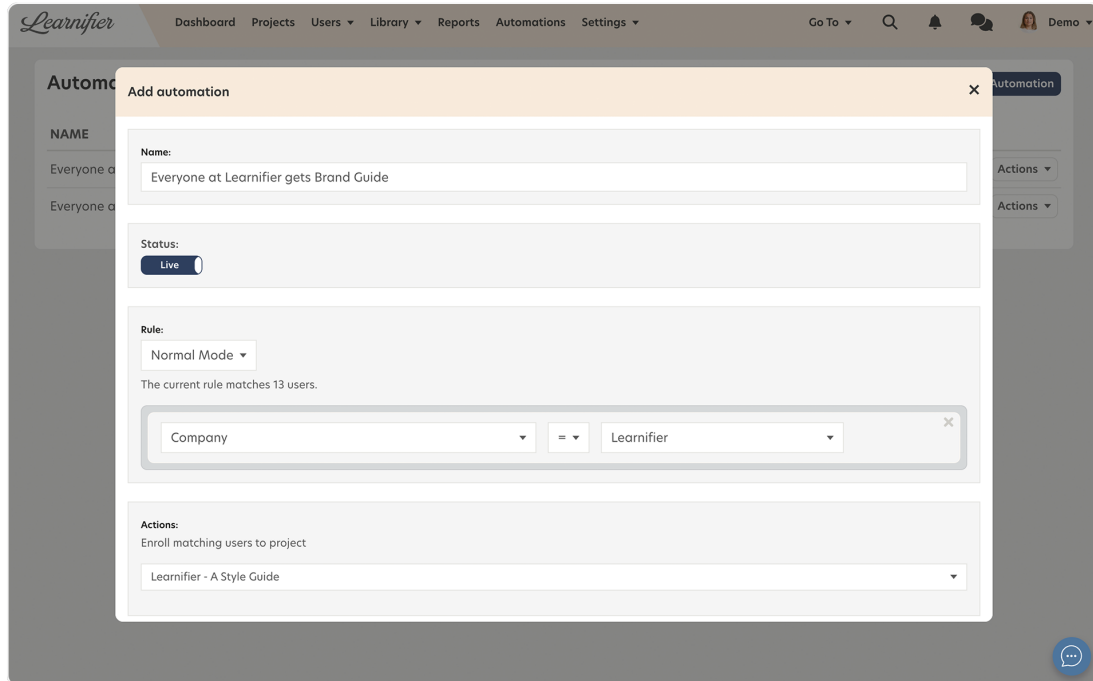
Q Search in catalog Name (A-Z)

<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>
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## 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' form in the Learnifier interface. The form 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 box with a search icon (X) on the right. It contains a dropdown menu with 'Company' selected, followed by an equals sign (=) and another dropdown menu with 'Learnifier' selected.
- 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'.