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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 web application interface. At the top, there's a navigation bar with the Learnifier logo and various menu items: Dashboard, Projects, Users, Library, Reports, Automations, and Settings. Below this is a secondary navigation bar with tabs: OVERVIEW, PARTICIPANTS (selected), WAITLIST, COURSE PAGE, EVENTS, ASSIGNMENTS, DETAILS, COMMUNICATIONS, REPORTS, and SETTINGS. The main content area displays 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 creation and update dates: 'Demo Ester Monday, May 29, 2023'. There are buttons for 'Edit course', 'Preview', 'Delete', and 'Copy'. A green arrow points to the 'Individual' tab in the 'PARTICIPANTS' section. Below the tabs, there's a form for adding a participant. It has a dropdown menu for 'Search for existing user in organization', and input fields for 'First Name', 'Last Name', and 'Email'. At the bottom of the form is an 'Add participant' button. On the right side of the interface, there's a vertical sidebar with a 'Help Section' button. At the bottom of the page, there's a section for 'Calendar invitations' with a toggle switch set to 'ON' and a link to 'Turn them OFF?'. Below this is a search bar for 'Search participants' and a button for 'Select members in group'.

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 application interface. At the top, there is a navigation bar with the Learnifier logo and various menu items: Dashboard, Projects, Users, Library, Reports, Automations, and Settings. Below this 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 the course details for "Introduction to Learnifier". It includes a project title (ADMIN) and a course title (LEARNER), both "Introduction to Learnifier". It also shows the 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" button in the "Individual", "Group", and "Upload" tabs. Below the tabs, there is a section titled "Upload participant list" with instructions to download a template and upload a roster. A button labeled "Upload participant list" is visible. At the bottom, there is a section for "Calendar invitations" with a toggle switch set to "ON" and a link to "Turn them OFF?". Below this is a search bar for participants and a dropdown menu for "Select members in group". A row of buttons includes "Send Email...", "Send Text...", "Change Expiration", "Activate", "Add to group", "Move", "Re-enroll", and "Remove". A table header is partially visible with columns: 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](#).

LEARNIFIER

DashboardProjectsUsersLibraryReportsAutomationsSettings

Go To🔍🔔🗨️Ester

OVERVIEWPARTICIPANTSWAITLISTCOURSE PAGEEVENTSASSIGNMENTSDetailsCOMMUNICATIONSREPORTSSETTINGS

Course page

Edit course page

Catalog builder

Show in catalog builderOn

Registration

StatusOn

Link

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

Download

ModeratedOff

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 CoursesCatalogAwardsTeam

Go To🔍🔔🗨️Demo

Catalog

Catalog

Deep-divesMandatory coursesPlaybooksSecurity

Search in catalogName (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 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 with the value 'Everyone at Learnifier gets Brand Guide'.
- Status:** A toggle switch labeled 'Live'.
- Rule:** A dropdown menu set to 'Normal Mode'. Below it, a message states 'The current rule matches 13 users.'.
- Rule Configuration:** A row of three dropdown menus: 'Company', '=', and 'Learnifier'. A small 'X' icon is on the right side of this row.
- Actions:** A section titled 'Actions:' with the text 'Enroll matching users to project'. Below this is a dropdown menu set to 'Learnifier - A Style Guide'.

The background shows the Learnifier dashboard with a navigation bar containing 'Dashboard', 'Projects', 'Users', 'Library', 'Reports', 'Automations', and 'Settings'. The 'Automations' tab is active. On the right side of the dashboard, there is a sidebar with 'Automation' and 'Actions' buttons.