

Inviting participants

Ester Andersson - 2024-10-27 - Getting started

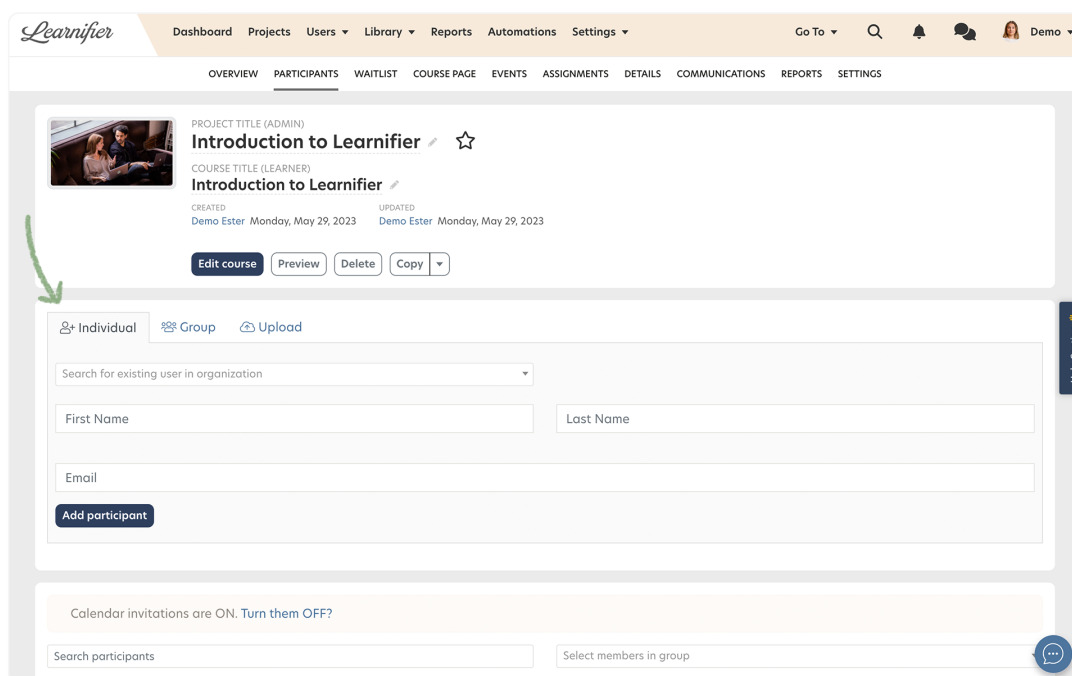
There are several ways to invite participants, and in this article, you'll learn all of them!

Note

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- [Self-reg](#)
- [Catalog](#)
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Manually

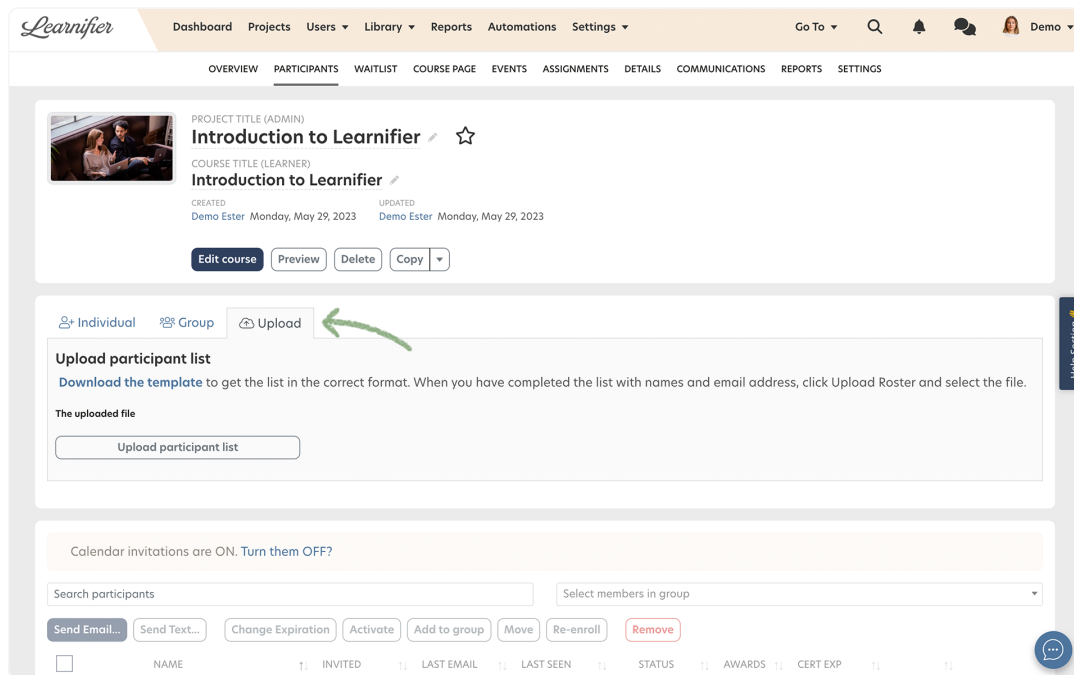
Enter the participant's first name, last name, and email address under "participants" → "individual". Select the participant you wish to invite in the participant list and click "Send email".



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 shows 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 navigation bar, there are icons for search, notifications, chat, and a user profile 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: 'Demo Ester 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 'Upload participant list' section. This section includes a link to 'Download the template' and a button labeled 'Upload participant list'. Below this, there is a notification that 'Calendar invitations are ON. Turn them OFF?'. At the bottom, there is a search bar for participants and a dropdown menu 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 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 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 [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

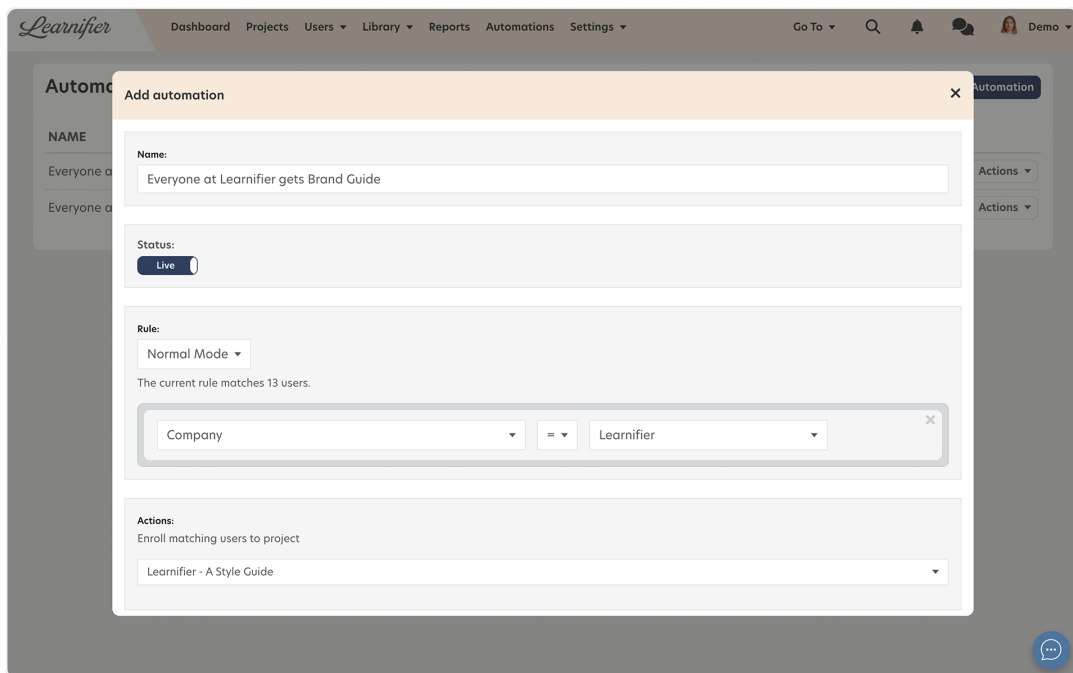


Your new learning platform

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' form in the Learnifier application. The form is titled 'Add automation' and is set against a background of the application's dashboard. The dashboard includes a navigation bar with 'Dashboard', 'Projects', 'Users', 'Library', 'Reports', 'Automations', and 'Settings'. The 'Automations' tab is active, and the 'Add automation' form is displayed in the foreground.

The form contains the following fields and options:

- Name:** A text input field containing 'Everyone at Learnifier gets Brand Guide'.
- Status:** A toggle switch set to 'Live'.
- Rule:** A dropdown menu set to 'Normal Mode'. Below it, a message states 'The current rule matches 13 users.' A rule configuration box shows 'Company' selected in a dropdown, followed by an equals sign and another dropdown set to 'Learnifier'.
- Actions:** A dropdown menu set to 'Enroll matching users to project'. Below it, a dropdown menu is set to 'Learnifier - A Style Guide'.