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Inviting participants

Ester Andersson - 2024-10-27 - Getting started

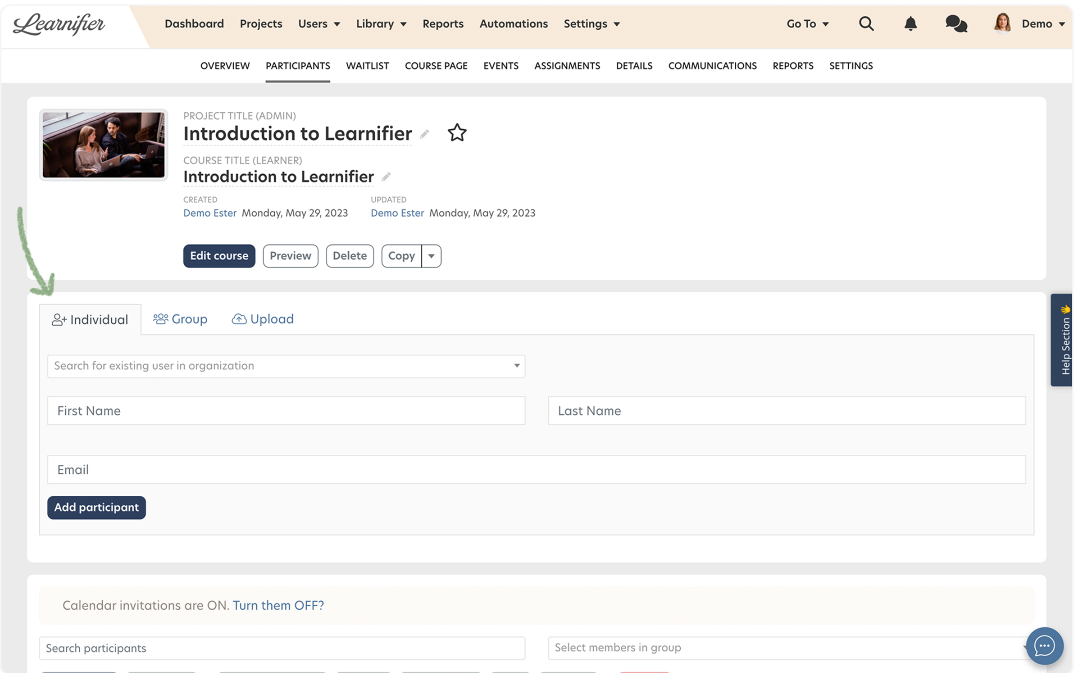
There are several ways to invite participants, and in this article, you'll learn all of them!

Note

- Manually
- Via list
- Self-reg
- Catalog
- Automations

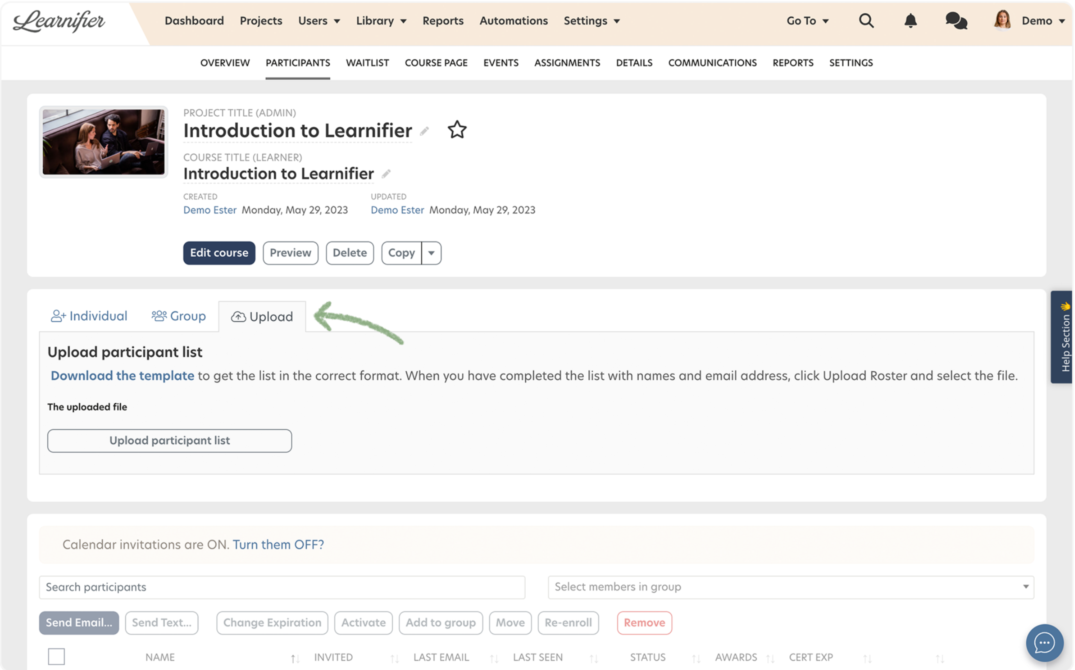
Manually

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

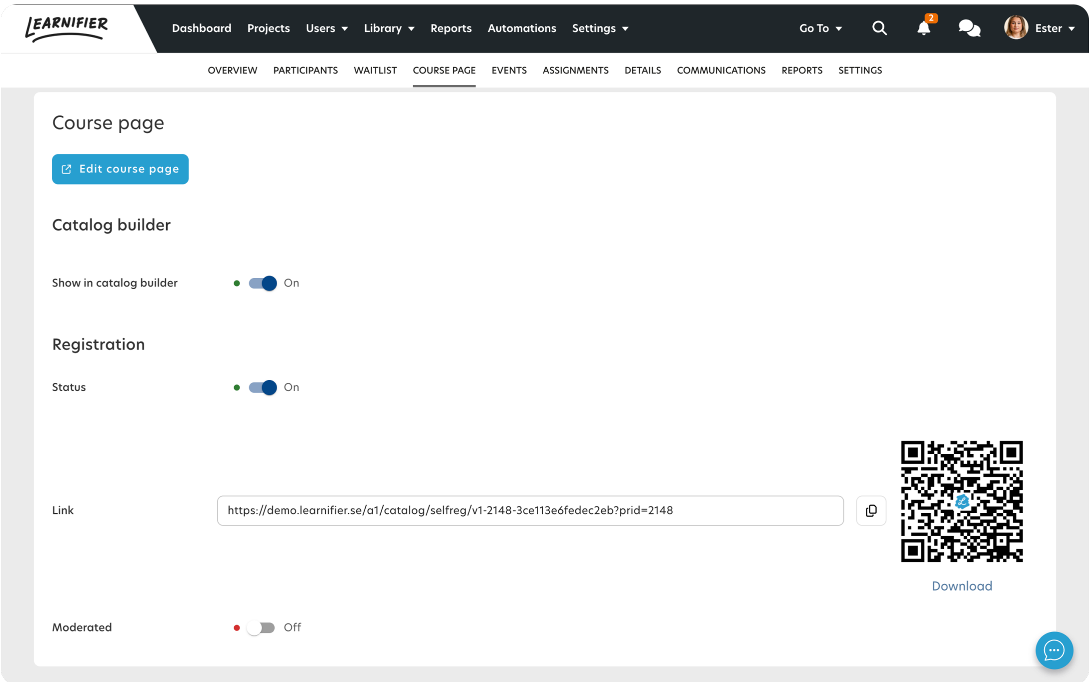
Download the template that can be found under the “Upload” tab and enter the participants' information (first name, last name, e-mail address, and telephone number with country code). Click “Upload participant list” and send an invitation email!



Self-reg

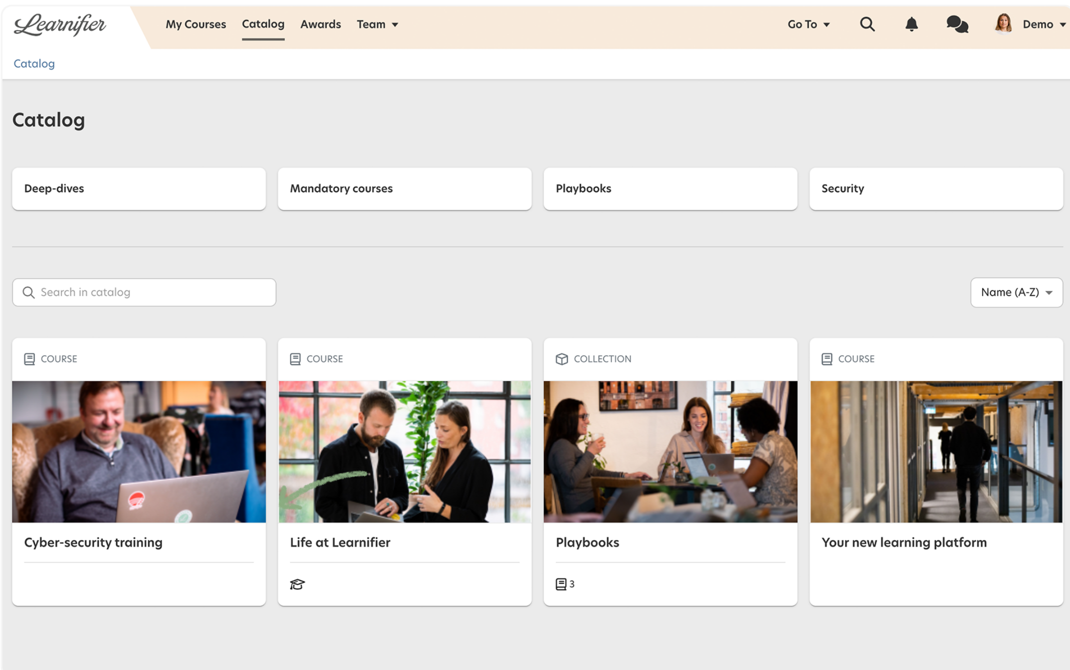
Participants can also self-register for a course. All you have to do is send them the specific link or QR-code under the "Course Page" tab → "Register". Remember, anyone with the link or code can sign up for the course. You can also brand the self-registration page so it resembles the course. Set an 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.



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.



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)