

Inviting participants

Ester Andersson - 2024-10-27 - Getting started

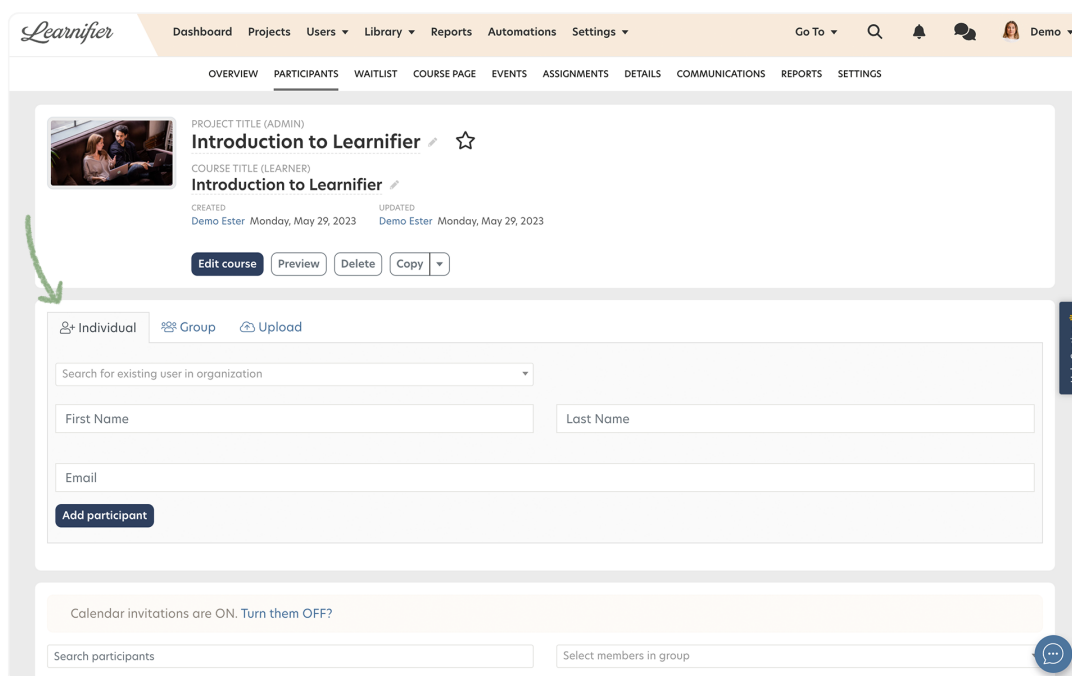
There are several ways to invite participants, and in this article, you'll learn all of them!

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!

The screenshot displays the Learnifier web 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, a secondary menu shows tabs for OVERVIEW, PARTICIPANTS (which is active), WAITLIST, COURSE PAGE, EVENTS, ASSIGNMENTS, DETAILS, COMMUNICATIONS, REPORTS, and SETTINGS. The main content area shows a course titled 'Introduction to Learnifier' with a star icon. It includes fields for 'PROJECT TITLE (ADMIN)' and 'COURSE TITLE (LEARNER)', both set to 'Introduction to Learnifier'. Below these are 'CREATED' and 'UPDATED' dates, both 'Monday, May 29, 2023', attributed to 'Demo Ester'. Action buttons for 'Edit course', 'Preview', 'Delete', and 'Copy' are visible. A green arrow points to the 'Upload' button in the 'Individual', 'Group', and 'Upload' tabs. The 'Upload participant list' section contains a link to 'Download the template' and a button labeled 'Upload participant list'. Below this, a notification states 'Calendar invitations are ON. Turn them OFF?'. A search bar for participants and a dropdown for 'Select members in group' are present. A row of action buttons includes 'Send Email...', 'Send Text...', 'Change Expiration', 'Activate', 'Add to group', 'Move', 'Re-enroll', and 'Remove'. At the bottom, a table header is visible 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 Profile 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

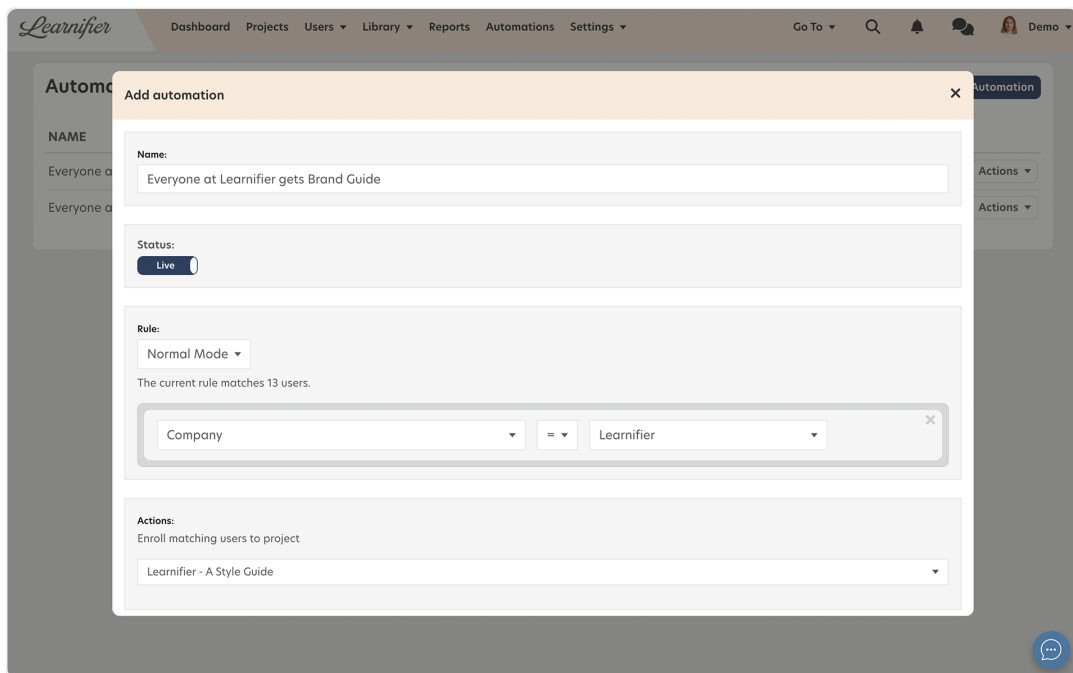


Your new learning platform

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 a list of existing automations is visible on the left. The form itself is a modal window with the following 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.' A rule configuration bar shows 'Company' selected in a dropdown, followed by an equals sign and another dropdown set to 'Learnifier'.
- Actions:** A section titled 'Enroll matching users to project' with a dropdown menu set to 'Learnifier - A Style Guide'.