

Inviting participants

Ester Andersson - 2024-10-27 - Getting started

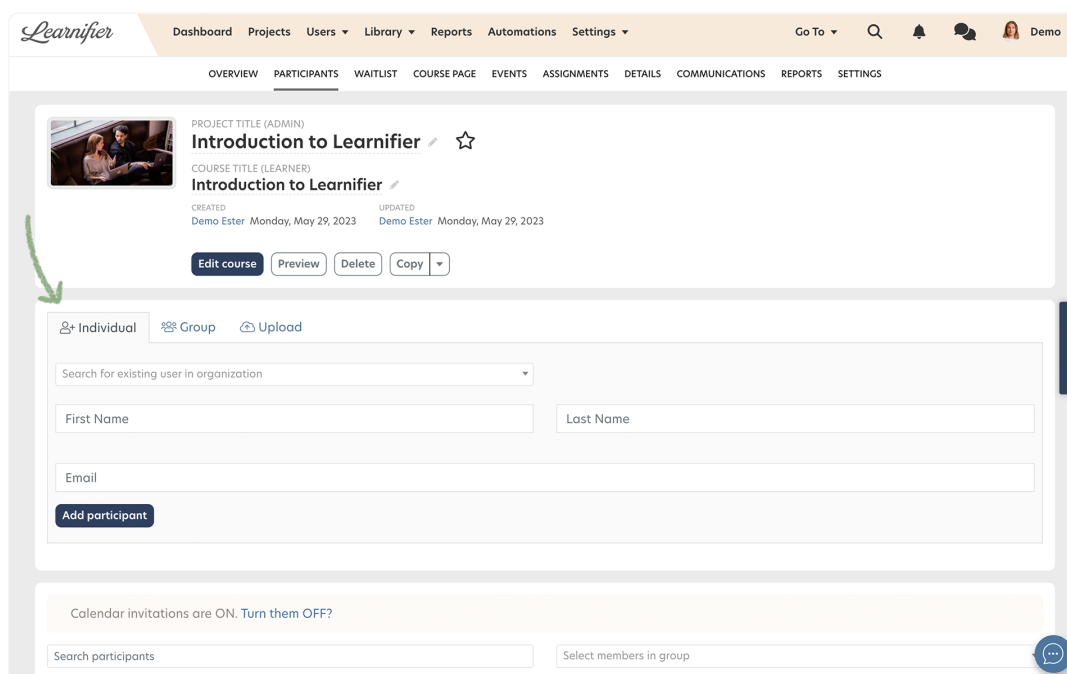
There are several ways to invite participants, and in this article, you'll learn all of them!

Note

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Manually

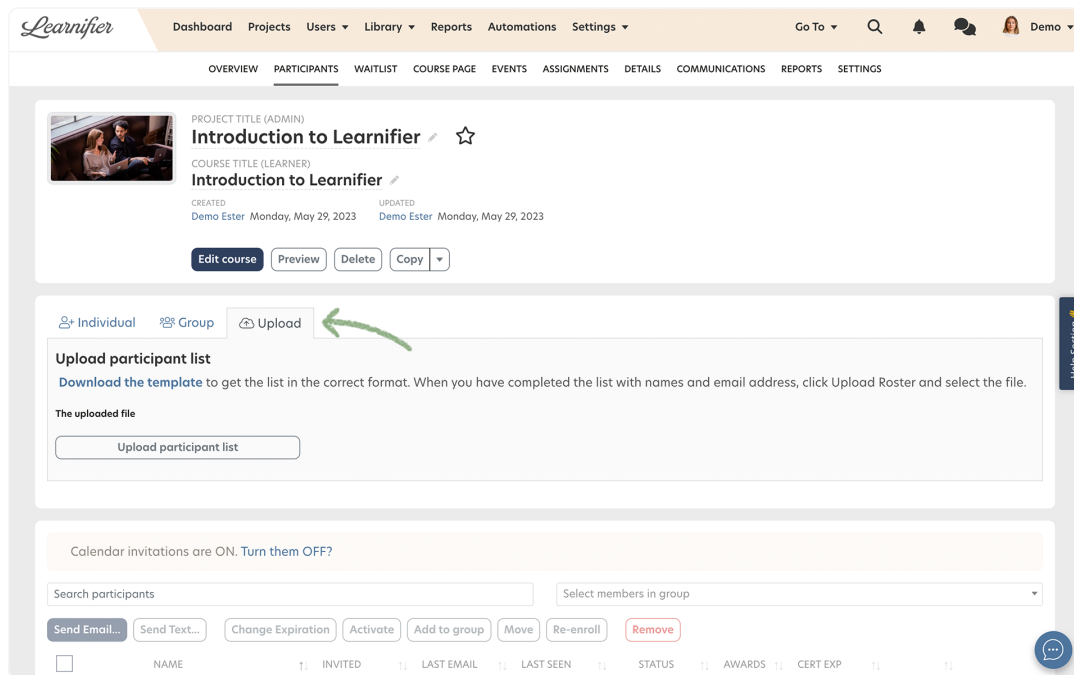
Enter the participant's first name, last name, and email address under "participants" → "individual". Select the participant you wish to invite in the participant list and click "Send email".



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 interface for a course titled "Introduction to Learnifier". The top navigation bar includes "Dashboard", "Projects", "Users", "Library", "Reports", "Automations", and "Settings". The main navigation bar includes "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". It also displays the creation and update dates: "CREATED Demo Ester Monday, May 29, 2023" and "UPDATED Demo Ester Monday, May 29, 2023". Below this, there are buttons for "Edit course", "Preview", "Delete", and "Copy".

The "PARTICIPANTS" tab is active, and the "Upload" button is highlighted with a green arrow. The "Upload participant list" section includes a "Download the template" link and a "The uploaded file" section with an "Upload participant list" button. Below this, there is a "Calendar invitations are ON. Turn them OFF?" notification and a search bar for participants. The bottom section shows a table with columns for NAME, INVITED, LAST EMAIL, LAST SEEN, STATUS, AWARDS, and CERT EXP.

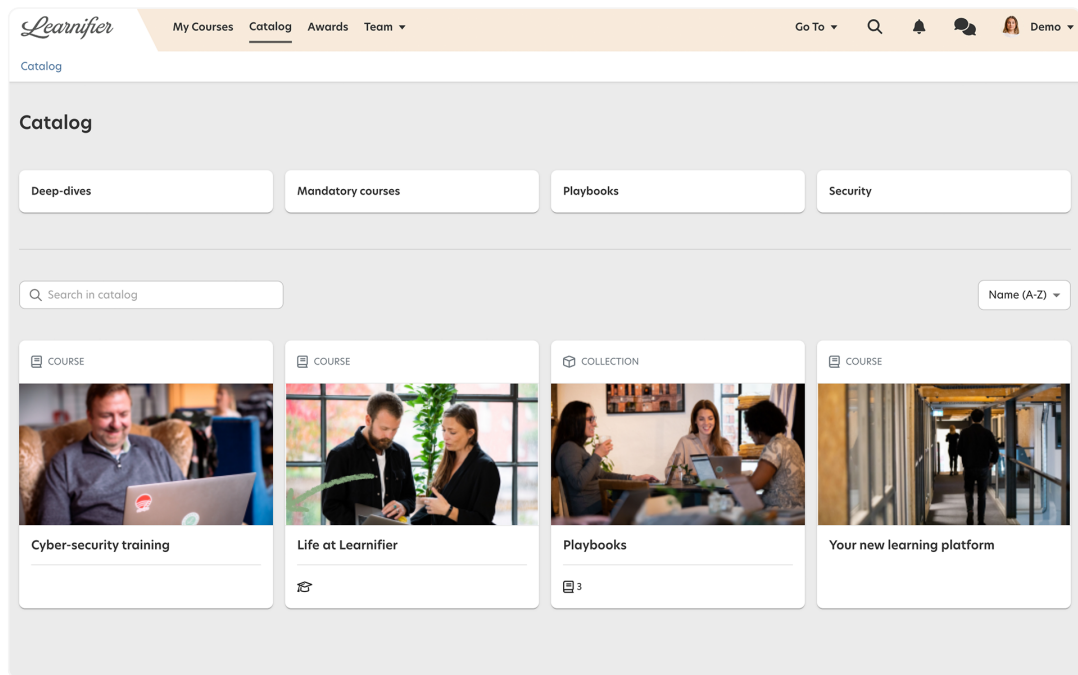
Self-reg

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](#).

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)

Automations

NAME

Everyone at

Everyone at

Add automation [Close]

Name:
Everyone at Learnifier gets Brand Guide

Status:
Live

Rule:
Normal Mode
The current rule matches 13 users.
Company = Learnifier

Actions:
Enroll matching users to project
Learnifier - A Style Guide

