

People tab > All users - Invite attendees to your event

Last Modified on 09/09/2024 2:36 pm IDT

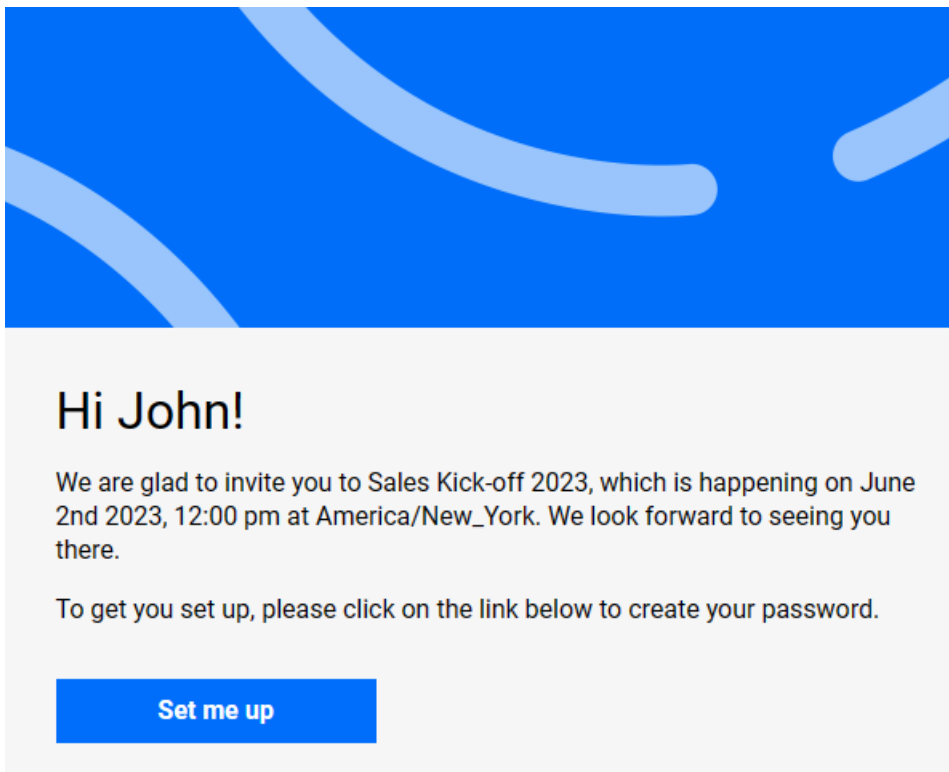
 This article is designated for all users.

About

This article describes how to:

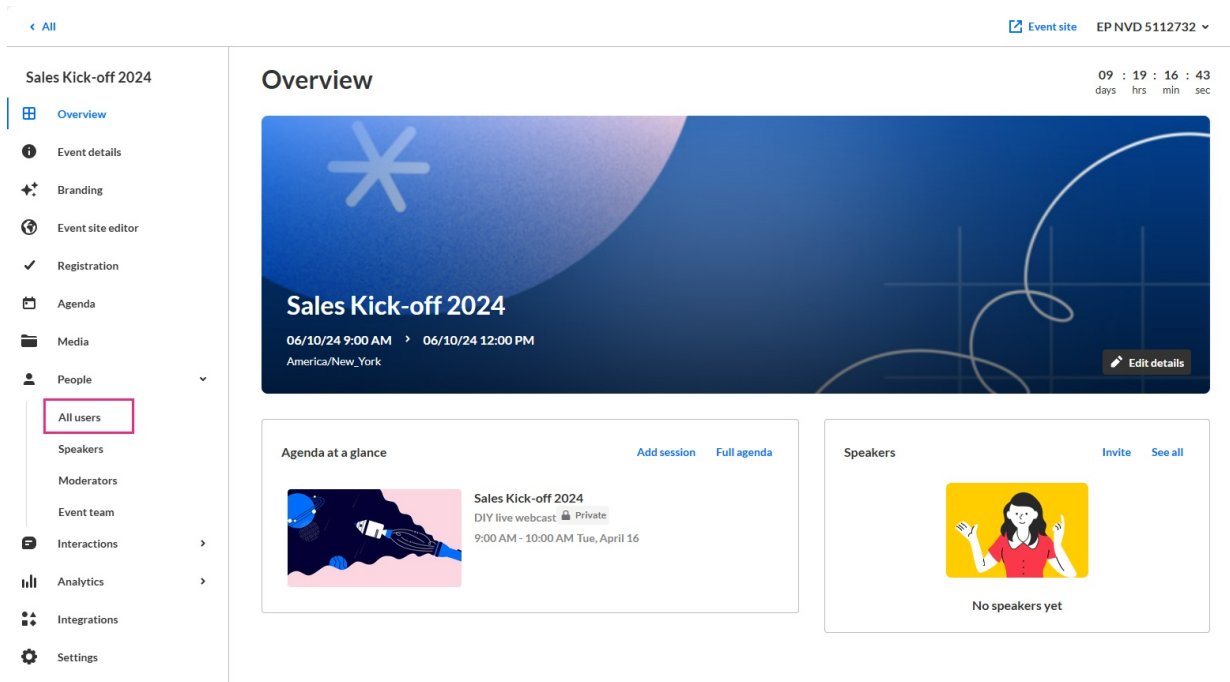
- Invite participants to your event via email - individually or in bulk.
- Add participants to the event *without sending them an invitation email*.
- View a list of attendees for an upcoming event and monitor their progress through the registration process
- Perform additional actions on attendees per registration status.
- Manage event access for "closed" Single sign on (SSO) event - using custom event template only.

Following is one example of an invitation an attendee may receive.

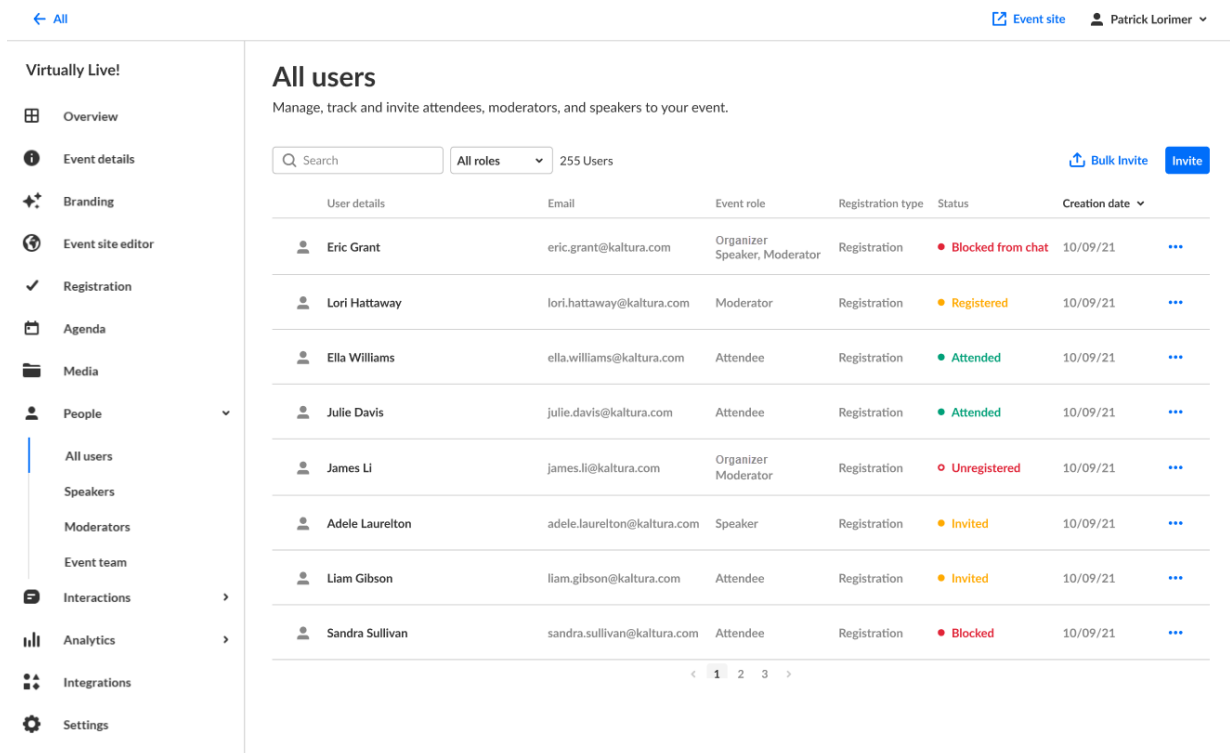


Invite individual participants to your event

1. Navigate to the All users page; from the Event page, click the People tab > All users.



The All users page displays.



2. Click **Invite**. The Invite screen displays.

Invite

Attendee

This invitation will be sent as an email to complete the registration.

Email (required)**First Name (required)****Last Name (required)****Additional event roles** Speaker Moderator

[Cancel](#)

Invite



3. Type the attendee's email address (required), first and last names (required), and choose whether (in addition to having a general attendee role) they will have the additional role(s) of Speaker and/or Moderator.

If you designate them as a Speaker and/or Moderator, additional fields display (highlighted in red below), allowing you to add an image, title, company, and bio.

Invite

Attendee

This invitation will be sent as an email to complete the registration.

Email (required)

eric.grant@kaltura.com

First Name (required)

Eric

Last Name (required)

Grant

Additional event roles

Speaker Moderator

Speaker Details

Recommended size:
500x500 px

[Upload image](#)

Title

Company

Bio

0/2500


Cancel

Invite



- Additional user details for the speaker and/or moderator are:
 - Profile image (optional) - Click **Upload image** (or **Replace** if one exists) to add/replace an image. Recommended size: 500x500px
 - Title (optional field) - Job title of the user
 - Company (optional field) - Company of the user
 - Bio (optional field) - Short description for the user's profile page on the event site. Character limit: 2500
- Once finished, click **Invite** to send an invitation email, or click the down arrow to the right of the **Invite** button and choose **Invite without an email** to add this

person to the event *without sending them an invitation email*.

 Once you are ready to send them the invite, you can click the three blue dots to the right of Creation date and select the 'resend email' option on the All users page.

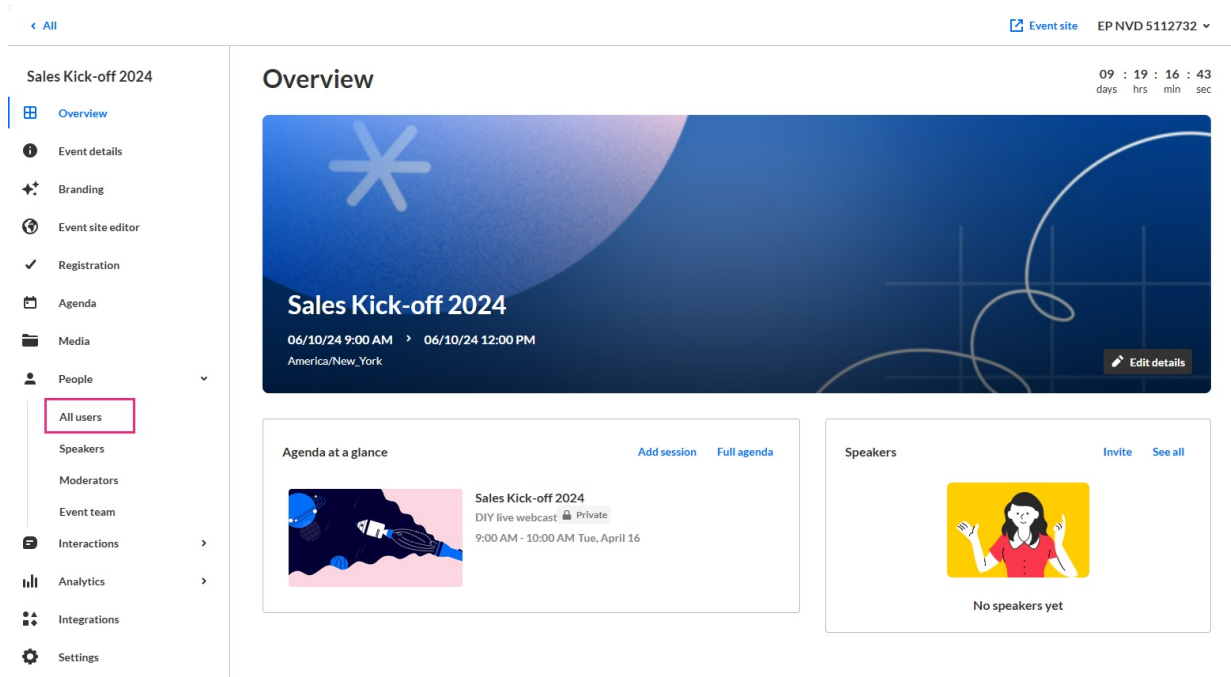
A notification asking you to confirm your action is displayed. Once the role is assigned, you cannot revert this action.

6. Click **Invite** to confirm or click **Cancel** to cancel the action.

If you clicked **Invite**, a notification that the invite was successfully sent is displayed and the invitation you created will be sent to participants to complete the registration. If you clicked the down arrow to the right of the **Invite** button and chose **Invite without an email**, a notification that the invite was successfully sent is displayed and the person is added to the All users list as "Registered".

Invite participants to your event in bulk

1. Navigate to the All users page; from the Event page, click the All users tab.



The screenshot shows the Kaltura event management interface for 'Sales Kick-off 2024'. On the left is a navigation sidebar with options like Overview, Event details, Branding, Event site editor, Registration, Agenda, Media, People, Speakers, Moderators, Event team, Interactions, Analytics, Integrations, and Settings. The 'All users' option under 'People' is highlighted with a red box. The main content area is titled 'Overview' and shows event details: 'Sales Kick-off 2024' from '06/10/24 9:00 AM' to '06/10/24 12:00 PM' in 'America/New_York'. Below this are two sections: 'Agenda at a glance' showing a 'DIY live webcast' session on 'Tue, April 16' from '9:00 AM - 10:00 AM', and 'Speakers' which currently shows 'No speakers yet' with an 'Invite' button.

The All users page displays.

← All Event site Patrick Lorimer

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All users

Manage, track and invite attendees, moderators, and speakers to your event.

All roles
255 Users

[Bulk Invite](#)
[Invite](#)

User details	Email	Event role	Registration type	Status	Creation date	
Eric Grant	eric.grant@kaltura.com	Organizer Speaker, Moderator	Registration	Blocked from chat	10/09/21	⋮
Lori Hattaway	lori.hattaway@kaltura.com	Moderator	Registration	Registered	10/09/21	⋮
Ella Williams	ella.williams@kaltura.com	Attendee	Registration	Attended	10/09/21	⋮
Julie Davis	julie.davis@kaltura.com	Attendee	Registration	Attended	10/09/21	⋮
James Li	james.li@kaltura.com	Organizer Moderator	Registration	Unregistered	10/09/21	⋮
Adele Laurelton	adele.laurelton@kaltura.com	Speaker	Registration	Invited	10/09/21	⋮
Liam Gibson	liam.gibson@kaltura.com	Attendee	Registration	Invited	10/09/21	⋮
Sandra Sullivan	sandra.sullivan@kaltura.com	Attendee	Registration	Blocked	10/09/21	⋮

< 1 2 3 >

2. Click Bulk invite. The Bulk invite screen displays.

Bulk Invite

.Upload a CSV file to invite multiple users at once

In the file, make sure these are separated by a comma for each user:

- Email address, first name, last name are mandatory
- Title, company name and Role (speaker/moderator) are optional

Download CSV template with examples to ease your work.

[Download CSV template](#)

Cancel

[Upload file](#)

3. Here you have three choices:

- Click **Download CSV template** to download a file that is already formatted and includes examples. Type the appropriate information for your users (email, first name, and last name are mandatory; role (speaker/moderator), title, and company are optional), save, then click **Upload file** to upload.

OR

- Click **Upload file** to upload your own CSV file (without using the pre-made template).

OR

- Click **Cancel** to cancel the action.
4. If you chose to upload a file (either your own or using a pre-made template), you are asked to check your file.

Check your file

These are the two first rows of your file. If everything looks alright, you can click on 'Invite'. Invitation will be sent as an email to complete the registration

	A	B	C	D	E	F
1	Email	First Name	Last Name	Role	Title	Company
2	roger.walter@kaltura.com	Roger	Walter	Moderator	Product Manager	Kaltura

452 Users

[Upload File Again](#)

[Cancel](#)

[Invite all](#)

5. If everything looks correct, click **Invite all**. You receive confirmation that the users are being invited. When the process is finished, you receive confirmation that the bulk invite has ended successfully.



Bulk invite has ended successfully

[Got it](#)

6. Click **Got it** to close the confirmation message.

Troubleshooting - things to consider when using bulk invite

Special characters:

- Email addresses cannot contain special characters (e.g., `☺☺@kaltura.com/Noël@kaltura.com`).
- If your CSV contains special characters in any other field (name, title, etc.), it should be uploaded as CSV with UTF-8 encoding format.

Duplications:

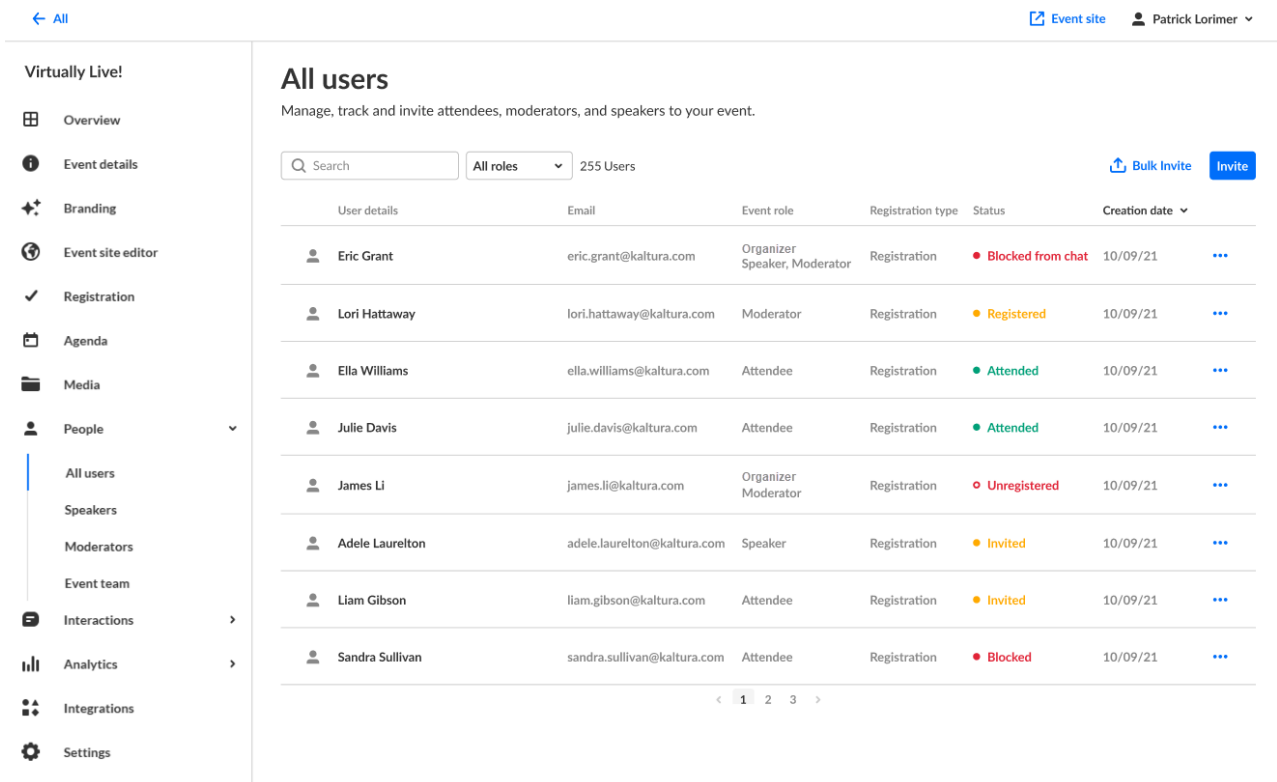
Make sure your list does not include duplicate email addresses.

Valid email addresses:

Make sure email addresses are valid (typos like ".con" will result in an error).

View a Full List of Attendees and Monitor their Progress through the Registration Process

Once you have sent your invitations, you can use the All users page to view the full list of attendees for your upcoming event (including name, email, role, status, and creation date) and monitor their progress through the registration process.



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All users
Manage, track and invite attendees, moderators, and speakers to your event.

Search All roles All roles 255 Users Bulk Invite Invite

User details	Email	Event role	Registration type	Status	Creation date	
Eric Grant	eric.grant@kaltura.com	Organizer Speaker, Moderator	Registration	● Blocked from chat	10/09/21	⋮
Lori Hattaway	lori.hattaway@kaltura.com	Moderator	Registration	● Registered	10/09/21	⋮
Ella Williams	ella.williams@kaltura.com	Attendee	Registration	● Attended	10/09/21	⋮
Julie Davis	julie.davis@kaltura.com	Attendee	Registration	● Attended	10/09/21	⋮
James Li	james.li@kaltura.com	Organizer Moderator	Registration	○ Unregistered	10/09/21	⋮
Adele Laurelton	adele.laurelton@kaltura.com	Speaker	Registration	● Invited	10/09/21	⋮
Liam Gibson	liam.gibson@kaltura.com	Attendee	Registration	● Invited	10/09/21	⋮
Sandra Sullivan	sandra.sullivan@kaltura.com	Attendee	Registration	● Blocked	10/09/21	⋮

< 1 2 3 >

You can use the search and filter options to locate specific attendees easily.

Perform additional actions on attendees per registration status

You can click the three blue dots to the right of Creation date to access additional options per registration status.

Registration	● Registered	10/09/21	⋮
Registration	● Participated		<ul style="list-style-type: none"> Edit Re-send email ⓘ View analytics Remove
Registration	● Confirmed		
Registration	● Invited		

Registration Status	Options
Attended	Edit, View analytics, and Remove
SSO login	Edit, View analytics, and Remove
Invited	Edit, Re-send the email (invitation), and Remove
Registered	Edit, Re-send email (registration confirmation), View analytics, and Remove
Unregistered	N/A
Blocked	Edit and View Analytics

💡 For information on removing users versus completely deleting them from the system, please see [Remove users](#).

💡 If a user has already accessed the Event site, opened the Chat and Collaborate widget, and agreed to the widget's terms of use, one additional option displays for Attended users in addition to those listed above - **Block from chat**. Using this option, you can block the user from sending messages in the Chat and Collaborate widget.

💡 If you chose for your attendees to log into your event via email (AKA Magic Link), one additional option displays for Invited and Registered users in addition to those listed above - **Generate login link**. Using this option, you can copy and send attendees the login link.

Hovering over the registration status in the All users page reveals a higher granularity of status which may include the following:

Registration Status	Detailed Status
Registered	Registered
Invited	Invited by team member
Invited	Invited by team member to register
Registered	Confirmed email
Registered	Registered no confirmation required
Attended	Pre-event visit
Attended	During-event visit
SSO login	SSO login
Unregistered	Unregistered
Blocked	Blocked

In our example below, the registration status is Attended, but when hovering over the registration status, we can see this participant visited the site before the event started (i.e., Pre-event visit).

@kaltura.com	Event manager, Speaker, Moderator	Registration	● Blocked from chat	10/09/21	⋮
y@kaltura.com	Moderator	Registration	● Registered Pre-event visit	10/09/21	⋮
@kaltura.com	Attendee	Registration	● Attended	10/09/21	⋮
kaltura.com	Attendee	Registration	● Attended	10/09/21	⋮

Speakers page

The Speakers page allows you to view a full list of speakers for your upcoming event (including name, bio, and status) and monitor their progress through the registration process. You may also invite new speakers directly from the Speakers page. See [Kaltura Events - Invite Speakers to Your Event](#).

Moderators page

The Moderators page allows you to view a full list of moderators for your upcoming event (including name, bio, and status) and monitor their progress through the registration process. You may also invite new moderators directly from the Moderators page. See [Kaltura Events - Invite Moderators to Your Event](#).

Manage event access for "closed" Single sign on (SSO) event



See [Closed events](#) for more information. Closed events are available only when using SSO and a "closed" group

setup via a custom event template.

If you are hosting a "closed" Single sign on (SSO) event, you can use the All users page to manage access for your attendees. For these types of events, an additional tab displays on the All users page - **Event access**.

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All users

Manage, track and invite attendees, moderators, and speakers to your event.

All users
Event access

All roles ▾
255 Users
Bulk Invite
Invite

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Ella Williams	ella.williams@kaltura.com	Attendee	Registration	Attended	10/09/21	⋮
Julie Davis	julie.davis@kaltura.com	Attendee	Registration	Attended	10/09/21	⋮
James Li	james.li@kaltura.com	Organizer Moderator	Registration	Unregistered	10/09/21	⋮
Adele Laurelton	adele.laurelton@kaltura.com	Speaker	Registration	Invited	10/09/21	⋮
Liam Gibson	liam.gibson@kaltura.com	Attendee	Registration	Invited	10/09/21	⋮
Sandra Sullivan	sandra.sullivan@kaltura.com	Attendee	Registration	Blocked	10/09/21	⋮

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Click the Event access tab. The Event access page displays.

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All users 🔒 Closed event

Manage, track and invite attendees, moderators, and speakers to your event.

[Users](#) [Event access](#)

All groups

17 Groups

[Access settings](#)

Access granted to 0 groups

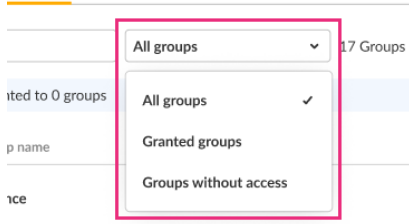
Group name	Access granted	Size	Last update	
Finance		22	11/07/23	Grant access
Product		23	11/07/23	Grant access
HR		8	11/07/23	Grant access
Sales		11	11/07/23	Grant access
Dev		67	11/07/23	Grant access
Security		8	11/07/23	Grant access
IT		8	11/07/23	Grant access

< 1 2 3 >

Filter groups

Filter for all groups, groups that have been granted access to the closed event, and for groups without access to the event. Click to expand the filter pull-down menu and select appropriate filter.

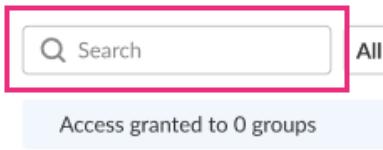
Event access



Search for group names

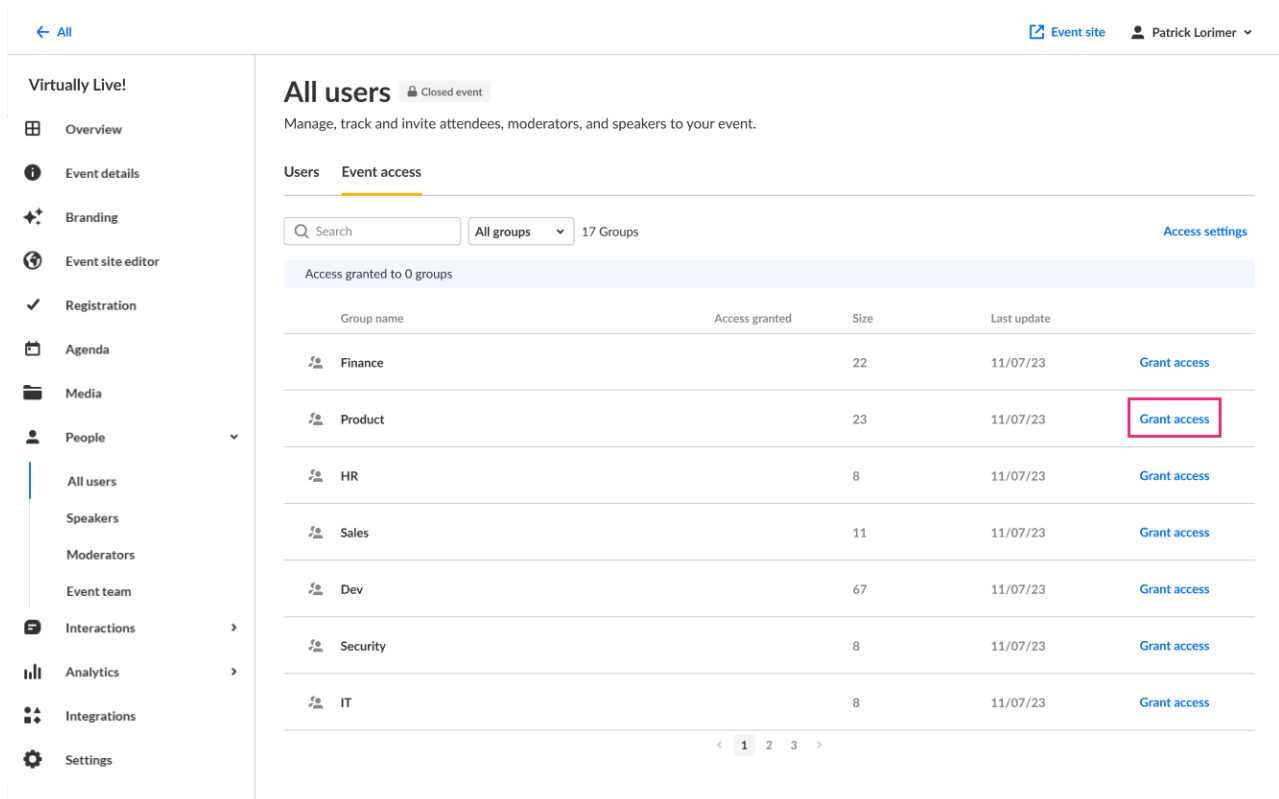
Search for a specific group name from the full list. Type your search criteria in the Search field and press Enter.

Users **Event access**



Grant access to the event

Click the **Grant access** button next to the group name to which you would like to grant event access.



















The screenshot shows the "All users" page for a "Closed event". The page title is "All users" with a lock icon and "Closed event" label. Below the title is a description: "Manage, track and invite attendees, moderators, and speakers to your event." There are tabs for "Users" and "Event access", with "Event access" selected. A search bar and a dropdown menu labeled "All groups" with "17 Groups" are visible. A blue banner indicates "Access granted to 0 groups". A table lists various groups with columns for "Group name", "Access granted", "Size", and "Last update". The "Product" group is highlighted with a red border, and its "Grant access" button is also highlighted with a red border. A "Remove access" button is visible next to the "Product" group name. A pagination bar at the bottom shows "1 2 3".

Group name	Access granted	Size	Last update	
Finance		22	11/07/23	Grant access
Product		23	11/07/23	Grant access
HR		8	11/07/23	Grant access
Sales		11	11/07/23	Grant access
Dev		67	11/07/23	Grant access
Security		8	11/07/23	Grant access
IT		8	11/07/23	Grant access

You receive confirmation that the group was granted access to the event and Remove access displays next to the group name.

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All users 🔒 Closed event








Manage, track and invite attendees, moderators, and speakers to your event.

Users **Event access**

All groups ▾ 17 Groups

[Access settings](#)

Access granted to 1 groups [View all](#)

















Group name	Access granted	Size	Last update	
 Finance		22	11/07/23	Grant access
 Product		23	11/07/23	Remove access
 HR		8	11/07/23	Grant access
 Sales		11	11/07/23	Grant access
 Dev		67	11/07/23	Grant access
 Security		8	11/07/23	Grant access
 IT		8	11/07/23	Grant access

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Remove access from the event

Click the **Remove access** button next to the group name from which you would like to remove event access.

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All users 🔒 Closed event








Manage, track and invite attendees, moderators, and speakers to your event.

Users **Event access**

All groups ▾ 17 Groups

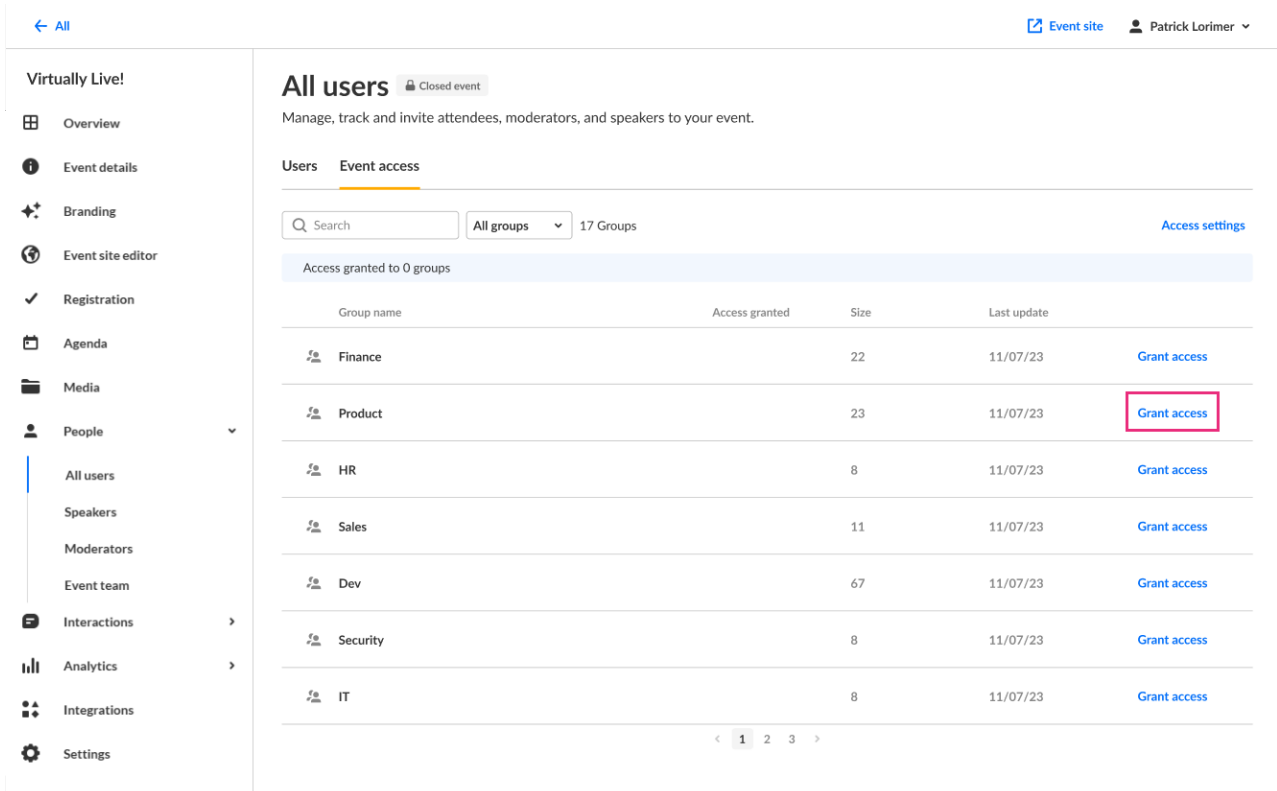
[Access settings](#)

Access granted to 1 groups [View all](#)

Group name	Access granted	Size	Last update	
 Finance		22	11/07/23	Grant access
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 HR		8	11/07/23	Grant access
 Sales		11	11/07/23	Grant access
 Dev		67	11/07/23	Grant access
 Security		8	11/07/23	Grant access
 IT		8	11/07/23	Grant access

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You receive confirmation that access was removed from this group and Grant access displays next to the group name.



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All users Closed event

Manage, track and invite attendees, moderators, and speakers to your event.

Users Event access

Search All groups 17 Groups Access settings

Access granted to 0 groups

Group name	Access granted	Size	Last update	
Finance		22	11/07/23	Grant access
Product		23	11/07/23	Grant access
HR		8	11/07/23	Grant access
Sales		11	11/07/23	Grant access
Dev		67	11/07/23	Grant access
Security		8	11/07/23	Grant access
IT		8	11/07/23	Grant access

< 1 2 3 >

Access settings

Enable/disable the option to invite or publish registration for additional users outside of the synced IdP groups.

1. Click **Access settings**. The Access settings screen displays.

Access settings

Besides the selected groups, you can **Invite** or **Publish** the **Registration** for additional SSO users. Switch off the **Additional users** option to disable this option.

Additional users ⓘ

Cancel

2. If you would like to enable the option of inviting or publishing registration for additional users outside of the synced IdP groups, turn the toggle switch to the "on" (default) position. If you would like disable the option of inviting or publishing registration for additional users outside of the synced IdP groups, turn the toggle switch to the "off" position.



3. Once you've made your selection, click **Save**. You receive confirmation that access settings were successfully saved.

[template("cat-subscribe")]
