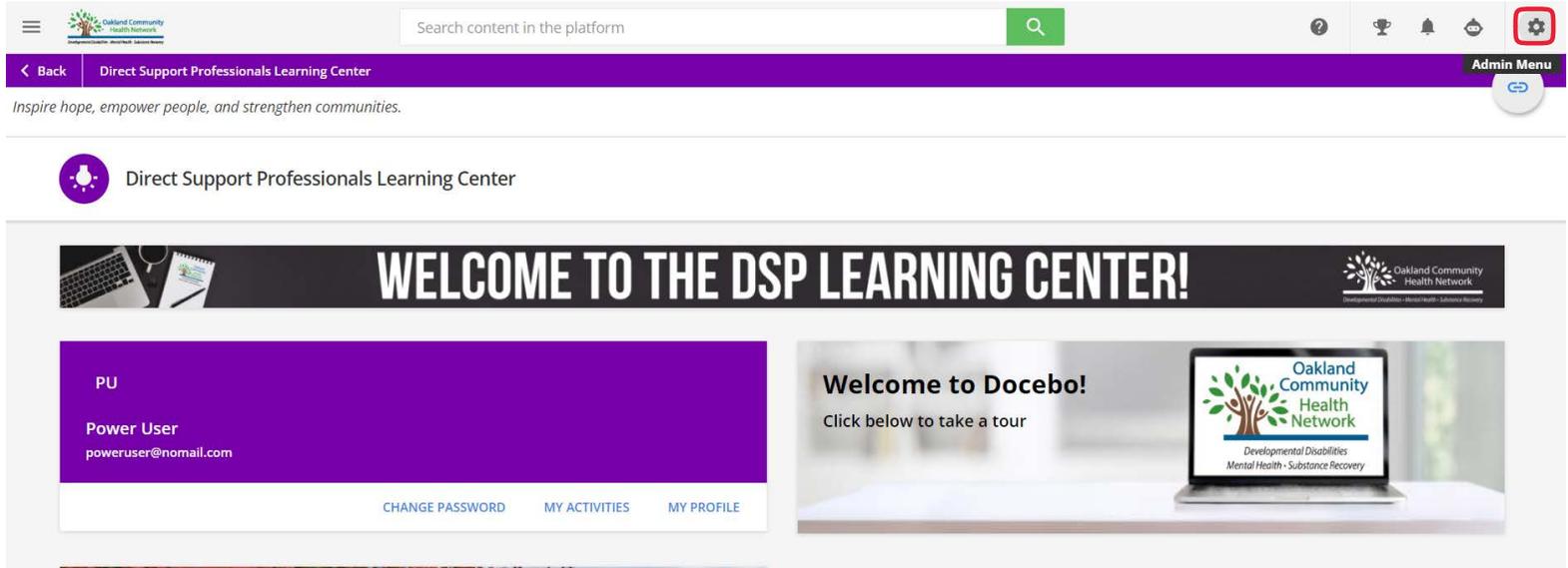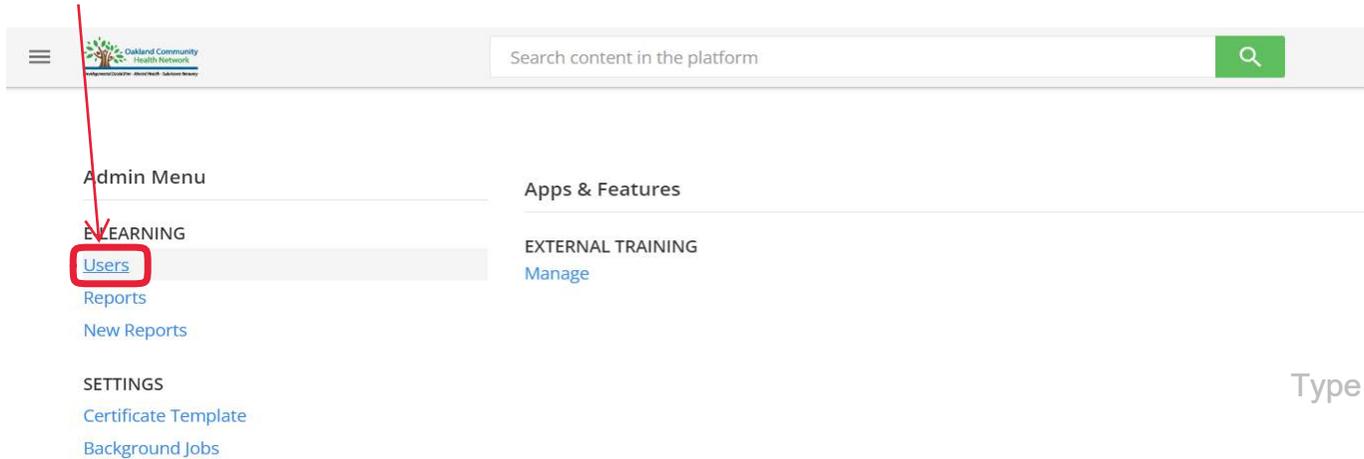# Creating a User (as a Power User)

1. Log in to your Docebo account.

2. Open the 'Admin Menu' by clicking the gear icon located at the top right corner of your homepage.

3. Select 'Users' from this menu to be redirected to the 'User Management' page.

** Note: from the user management page, you can search for users by username to ensure that they do not already have a Docebo account.
Usernames will be created by the Power Users following the same 8 digit formula for EVERY user:
First 4 digits of the users Date of Birth (in mm/dd format) followed by the last 4 digits of the users State issued ID/Drivers License number.


For example, this individuals username will be 05010100

****Search the users possible username in the search box indicated by the red outline.
If the user already exists, you can skip the user creation process to avoid providing this staff with duplicate Docebo accounts. **Please see instructions on the last 2 pages of this document to learn more about managing and enrolling a user that already has a Docebo account.
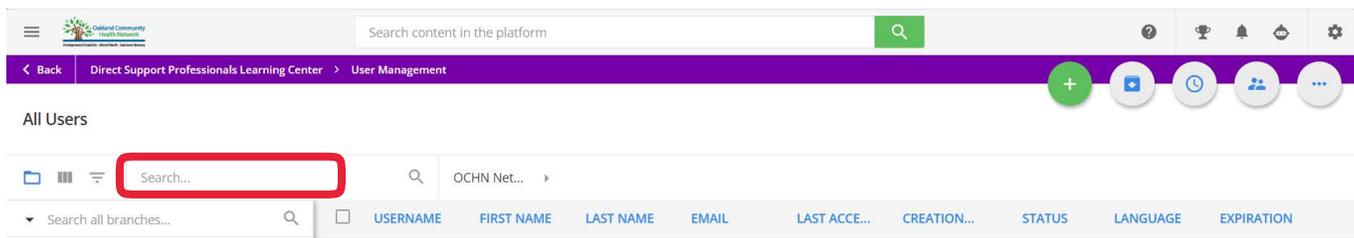
If the user does not already exist in Docebo, please continue at Step 4 below to create a new user

4. To add your employee as a new user, click on the 'New Users' icon, this will appear as a green circle with a small white + symbol. This will drop down a second icon that will appear as a green circle with a small person shaped icon on it. Select this icon to create a new user.
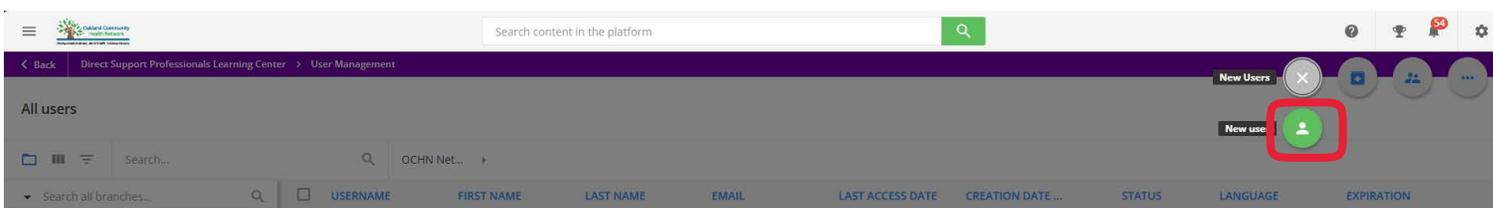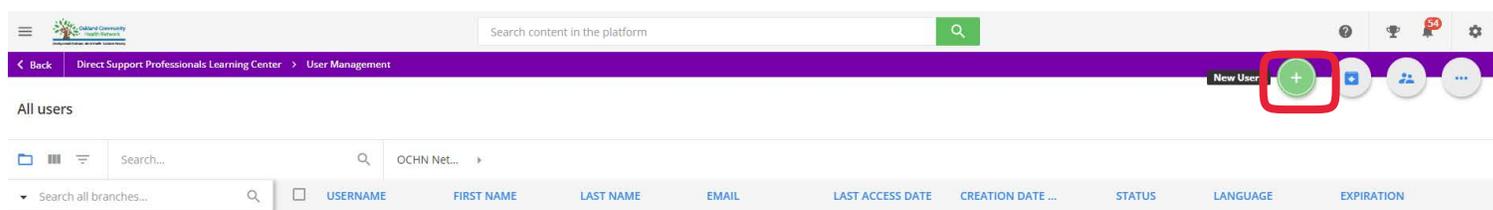
5. You will be directed to the first step of the user creation process shown in the screen shot below. Please read each note on the image carefully to learn more about user creation.

username will consist of the first 4 digits of the users D.O.B followed by the last 4 digits of the users drivers license/state ID number**

Everys users 'level' will automatically read 'User'. This can not be changed by the Power User

**Duplicate usernames happen! If the users username is already taken, please add the next consecutive letter of the alphabet to the END of the username. For example, if username 01020304 is already in use you will utilize username 01020304a. If username 01020304a is already in use, please utilize username 01020304b, etc.

Email

Email Validation Status
Unverified ▼

Enter an accurate and accessible email address for your user. This email will be used by Docebo to send automatic renewal reminders for courses as well as any follow up info they may need regarding any in person or instructor led trainings that they are signed up for.

Email validation status will automatically read 'Unverified'. We ask that you leave this setting as is

First Name   Last Name
                          0/255   0/255

Please enter the users First and Last Name as it appears on their ID. Avoid use of nicknames, etc. This will help Power Users avoid making duplicate accounts for the same user.

New Password *   👁   Retype Password *

🟢 Force users to change their password at their first login **

Create a password for your user. Please note that it is your responsibility, as the Power User to communicate the users username and email to them. Please record the users password in your records.

**Note, if the toggle button next to this statement is ON (appears green and to the right), this will force user to change their password upon their first log in.
If you do not want to force users to change their password to move forward, you can click the small green circle. It will appear OFF (grey and to the left as shown below). This willallow users to log in as normal and change their password at their leisure.

Toggle is now OFF ⟶   ⚪ Force users to change their password at their first login

User Status

✕ Expiration ✕

📅

Activate user at the end of the creation process

Send User has been created (by administrator) notification to new user. **

Send the 'User has been created (by administrator)' notification upon creating the user. This notification must already be configured and activated in the Notification App

New User Has Been Created By Admin   Inbox ×

Docebo Admin admin@nomail.com via oaklandchn.org
to me ▾

Greetings,

An administrator has created you as a new user in the OCHN Docebo learning platform. Please log in and change your password to begin.

- Click here to log in!

Once the first page of user creation is complete, select 'Next' to continue on to step 2 of user creation.

6. You will now be redirected to step 2 of user creation, "Branches". This step is what associates your user with your 'Branch' (or agency/organization). **Note: users can be associated with multiple branches, you as the Power User will not see which other branches your user has been associated with. You will only have the ability to add your own branch to the user. This is an important step for future tasks such as creating reports, etc.

✕   New User
In order to create a new user, please complete all of the following steps.

✓ General Information ——— ② Branches ——— ③ Additional Fields ——— ④ Team Members

Assign the user to a branch of the organization chart by selecting an item below

0 Items Selected

▾ Search all branches...   🔍

🗁 OCHN Network

☐ Direct Support Professional   >

The text 'Direct Support Professional' will appear in a light grey color. This text is unable to be selected as every user that you are adding will automatically be associated with the larger 'Direct Support Professional' branch.

To associate the user with your sepcific branch, select the small blue > symbol to the right of this (as shown above). This will generate a list of the branches that you are able to add your user to (this should only be one branch per Power User). Click on the small box next to the organizations name so that it appears as a green check mark as shown below.

Select 'Next' at the bottom of the screen to be redirected to step 3 of the user creation process.

7. The next step of the user creation process is entitled 'Additional Fields'. The first 4 items should be filled out accordingly.

The next 7 items on this page will automatically enroll users into a learning plan or courses based on your selections.
You can add users into any courses or learning plan at any time after the user creation process as well, if you do not wish to enroll users into a learning plan, simply select 'N/A - user not enrolled in learning plan' from the drop down menu that appears when you select 'Learning Plan Type'. This will not enroll the user into any courses.

Learning Plan Type *   Assisting people with eating/swallowing disorders *

Supporting Wheelchair Use/Immobility Positioning/Lifting an...▼   Autism Spectrum Disorder *

Intro to Feeding Tubes *   Supporting Individuals with Seizures *

Diabetes Support and Monitoring *

The remaining 6 drop items (marked with ***) refer to supplementary courses that the user may need to work with individuals served. Select 'Yes' from the drop down menu if you would like the user enrolled in that course, Docebo will automatically enroll user in that course.
Select 'No' from the drop down menu if you do not need the user enrolled in that course. You can go back into Docebo and enroll users in these courses at any time.

Once you have made a seleciton for every item, click 'Next' at the bottom of the page.

8. The final step of the user creation process is titled 'Team Members'.
This step will associate your user with you, as a Power User, and will aid in user management.

✕ New User
In order to create a new user, please complete all of the following steps.

✔ General Information —— ✔ Branches —— ✔ Additional Fields —— ④ Team Members —— ⑤ Review

Please select all of the team members of the user you're creating.

Manager Information

◯ User does not have a Direct Manager This toggle should remain OFF for all of the users you create

Direct Manager   Direct Manager B (additional employer ONLY)

If you are creating the user, start to type your name in the line that reads 'Direct Manager'. A drop down list of users will appear, select your name.

If you are creating the user, you should not utilize the line that reads 'Direct Manager B'. This is only for existing user management. See instructions below for more about editing/managing employees who already have a Docebo profile.
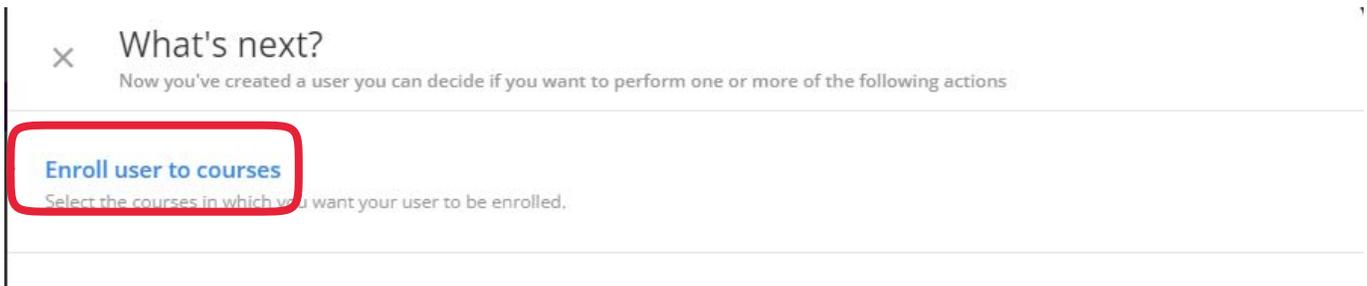
◯ This user manages a team
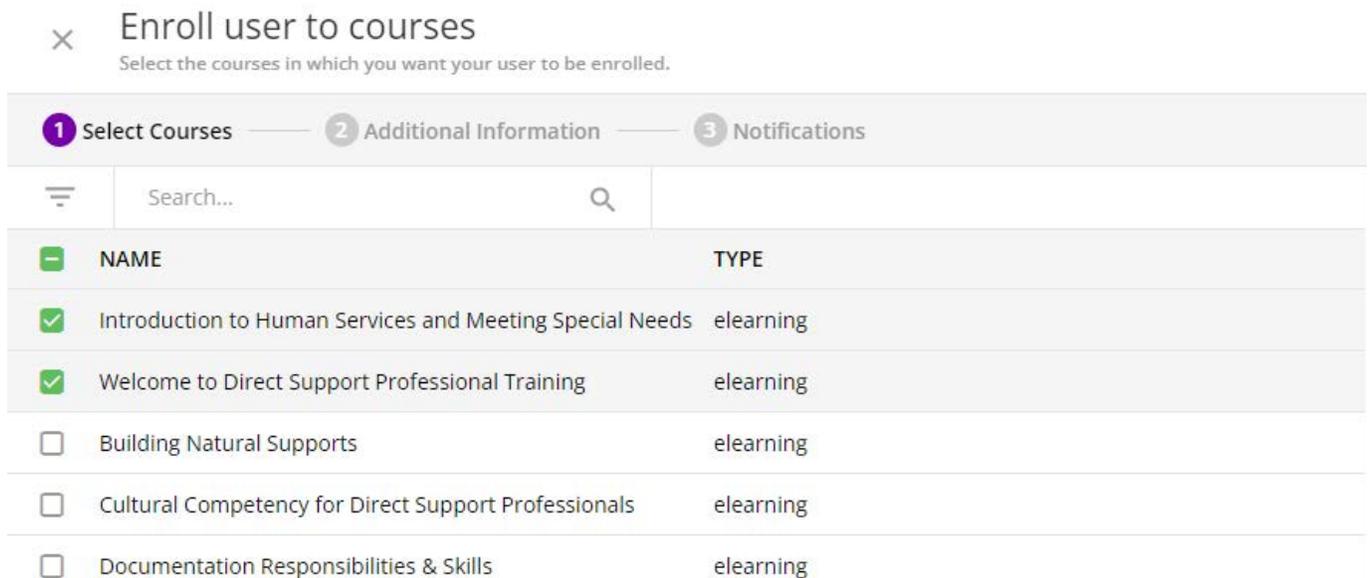This toggle should also remain OFF for all of the users you create

9. Select 'Review' at the bottom of the page. Review user information for accuracy. Select 'Create User' at the bottom of the page. A green message will appear that your user has been successfully created. Congrats! Your user is ready to log in and get started!

10. Once your user is created, you will have one more option on the user creation page. From this page you can enroll users into courses. This is a good time to enroll your user into courses if A. you did not enroll them into a learning plan or B. there are additional courses that were not included in the users learning plan that you need them to complete.

If you would like to enroll users into courses now, select 'enroll user into courses'.

What's next?

✕

Now you've created a user you can decide if you want to perform one or more of the following actions

Enroll user to courses
Select the courses in which you want your user to be enrolled.

This will redirect you to a list of courses in the DSP curriculum. Click the box the the left of the courses titles in which you would like to enroll your user so that a green check mark appears.

Enroll user to courses

✕

Select the courses in which you want your user to be enrolled.

1 Select Courses ——— **2** Additional Information ——— **3** Notifications

Search... 🔍	

⊟ NAME	TYPE
☑ Introduction to Human Services and Meeting Special Needs	elearning
☑ Welcome to Direct Support Professional Training	elearning
☐ Building Natural Supports	elearning
☐ Cultural Competency for Direct Support Professionals	elearning
☐ Documentation Responsibilities & Skills	elearning

Once you have selected all of the courses that you would like your user enrolled in, select 'Next' at the bottom of the page.

This will redirect you to the following page. Level should always remain 'Learner' for your users. Please also ensure that the toggle next to "Set enrollment deadline" is OFF at all times. Please do not set enrollment deadlines for users, as this affects their ability to renew certificates in the future.
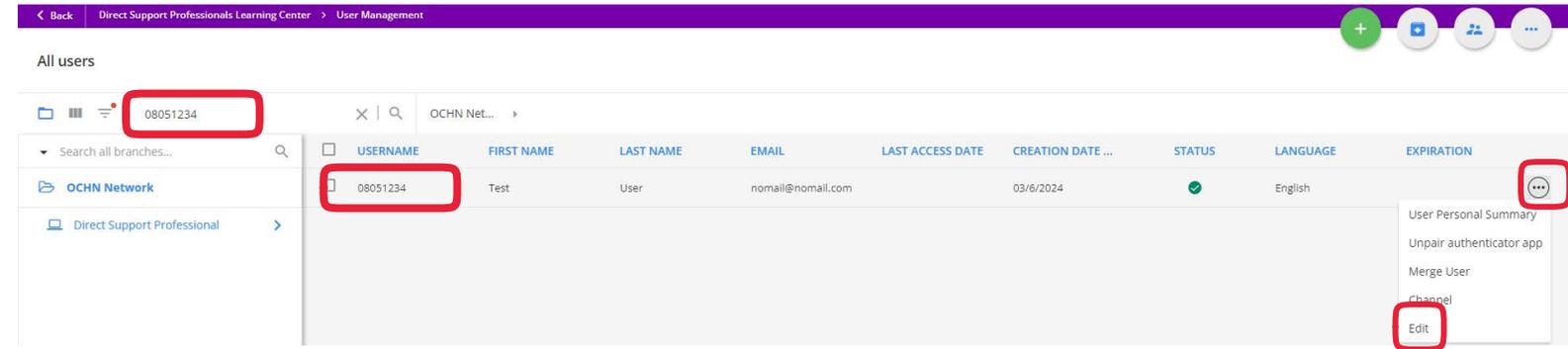

Select 'Next' at the bottom of the page, and then 'Confirm'. This will prompt a green message at the bottom of your screen stating that the user has been enrolled successfully.

If an employee already exists in Docebo, you do not have to make them a duplicate account. You simply will want to add the user to your branch, as well as add the user to your team. Follow the instructions below to manage users who already have a Docebo account.

1. Search for your user on the User Management page by typing what their name username will be in the search box. (Remember, every users username will consist of the forst 4 digist of their date of birth, followed by the last 4 digits on their State ID/Drivers License).
If your user appears, select the ... icon on the right of the screen. This will open a drop down menu of options. Select 'Edit'

2. This will open the users creation page for you to edit. Select step 2, 'Branches', and follow the steps to associate the user with your branch.

3. Now add the user to your team by selecting step 4, 'Team Members'. If the user already exists, that means that they were created by another Power User at some point. If a Power Users name already appears in the 'Direct Manager' line, then you will add your name to the 'Direct Manager B' line.
Start to type your name in the line and select yourself from the drop down menu.

Edit User

✕   In order to create a new user, please complete all of the following steps.

✓ General Information — ✓ Branches — ✓ Additional Fields — ④ Team Members — ⑤ Review

Please select all of the team members of the user you're creating.

Manager Information

⬤ User does not have a Direct Manager

Direct Manager
Danielle Watson   Direct Manager B (additional employer ONLY)

⬤ This user manages a team

Select 'Update' at the bottom of the page to save these changes. This user is now a part of your branch and team!
You can move forward with adding any courses to the users profile.