



Oakland Community Health Network

Developmental Disabilities • Mental Health • Substance Recovery

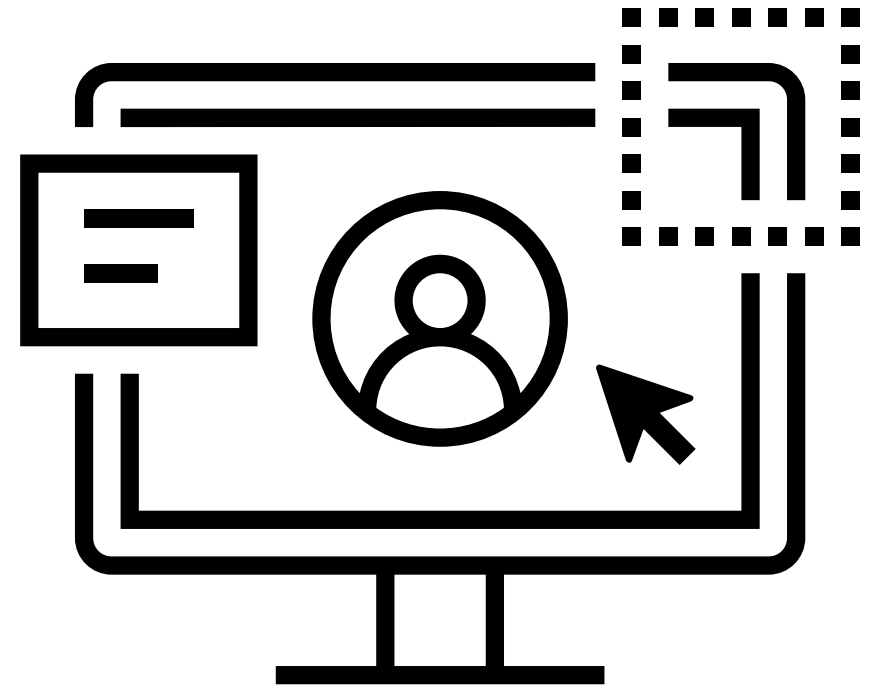
Creating and Managing Users in Docebo

Revised July 2026

Docebo New Navigation Menu

This section describes:

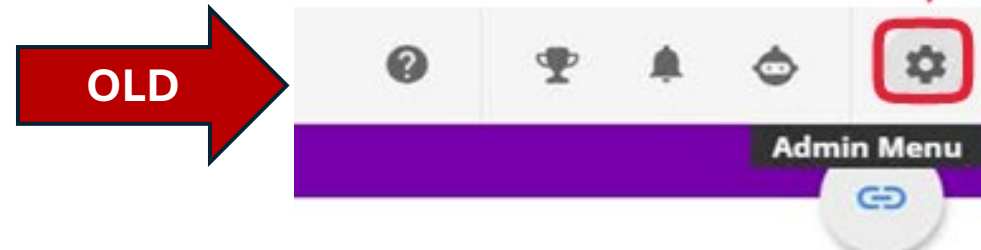
- Creating a new user in Docebo
- How to edit an existing user
- Updating a user's status
- How to enroll and unenroll a user into a course



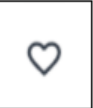
Docebo New Navigation Menu for Power Users

Docebo has redesigned the navigation menu. You will no longer access the Docebo menu using the gear icon located in the upper right corner of the screen.

The Former Navigation Menu



The New Navigation Menu

-  **User menu (cube icon):** This is the Power Users personal homepage in Docebo.
-  **Heart icon (favorites):** Opens a customized menu of the pages which the administrator has marked as favorites.
-  **People (people icon):** Configuration pages for *Users, Power Users, Groups*
-  **Content and delivery (folder icon):** Courses, Learning Plans, and Certificates
-  **Data and analytics (chart icon):** Configuration pages for *Reports*



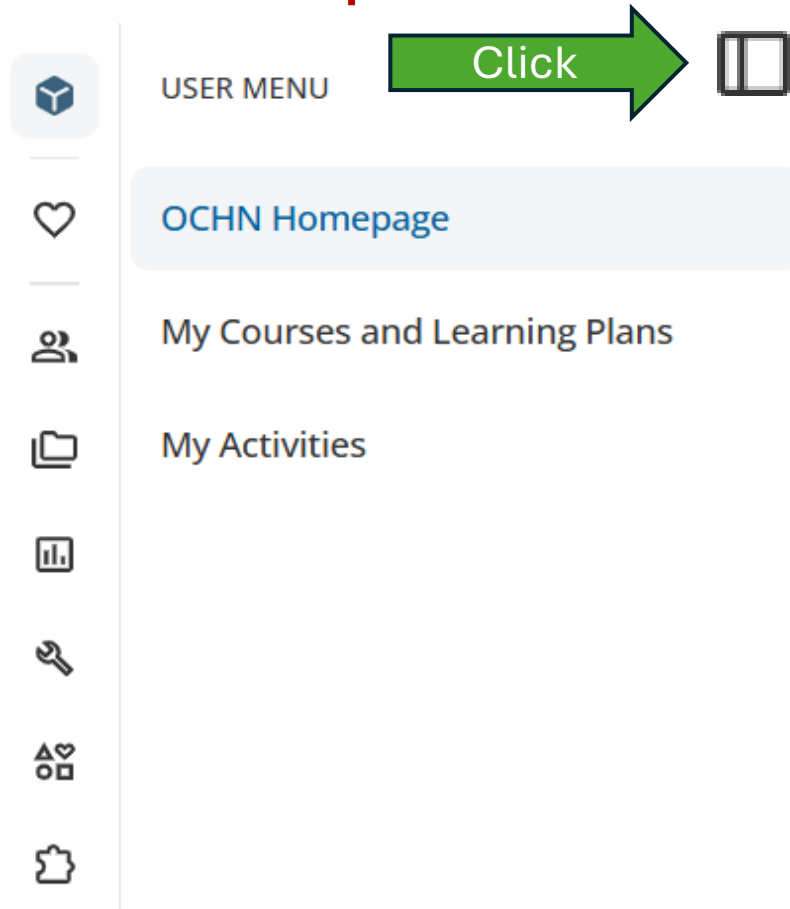
The new navigation has been completely redesigned and reorganized. It is more user friendly and intuitive.

The new menu is accessed from the left hand of the screen by clicking on the corresponding icon.

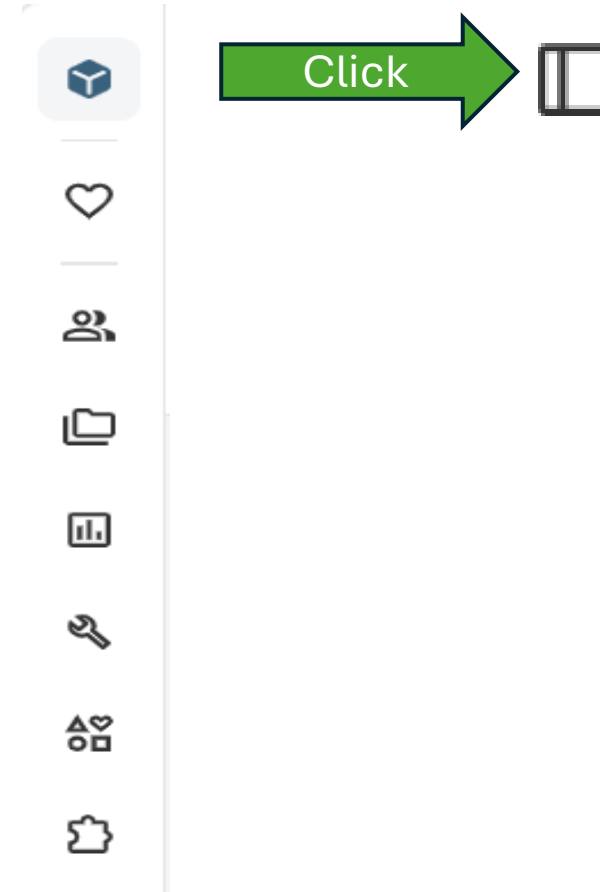
Docebo New Navigation Menu for Power Users

The new navigation menus provides you the ability to keep the user menu open or closed by clicking on the book icon. Providing users the ability to have quick ability to navigate menus while open or provide more workspace when closed.

Keep the menu open.



Keep the menu closed.



Accessing the User Menu

Step 1: Log into your **Docebo** account.

Step 2: Open the User Menu by clicking on the people icon located on the left side of the page.

Step 3: Search for the user in the “**Search for users**” field to confirm whether the account already exists.

- If the user **already exists**, do **NOT** create a duplicate account (see page # for instructions).
- If a username already exists, add a letter to the end of the username. Start with (a, b, c, etc.) continue until a unique username is created.

Step 4: If no account already exists, click on the “**New User**” button in the upper-right corner.

The screenshot shows the Docebo User Menu interface. On the left, a vertical sidebar contains icons for various functions, with the 'Users' icon highlighted and labeled 'Step 2' with a green arrow pointing to it. The main content area is titled 'Users' and features a search bar labeled 'Search for users' which is highlighted with a green box and labeled 'Step 3'. Below the search bar is a table of users. In the top right corner, there is a 'New users' button with a dropdown arrow, which is highlighted with a green box and labeled 'Step 4' with a green arrow pointing to it. The table contains columns for user selection, username, first name, last name, email, phone, date of birth, date of expiration, status, and language.

	USE...	FIR...	LAS...	EM...	LAS...	CRE...	STA...	LA...	EXP...
☐	051...	Cym...	Rod...	cym...	06/26/	06/26/	✓	English	
☐	arick...	April	Ricks	djay...	06/28/	06/25/	✓	English	

Creating the New User Account in Docebo

× **New user**
In order to create a new user, please complete all the following steps.

1 General information

2 Branches

3 Additional fields

4 Team Members

Please provide the information for the user you are going to create

User information

Username *

1st 4 digits of their D.O.B. and last 4 digits of Driver's license or State ID.

Level

User

Email

Enter valid email address for user

Email validation status

Unverified



Level is always set to User



Leave **Email Validation Status** set to "Unverified"

The **user's email is used** by Docebo to send:

- Automatic renewal reminders for courses and certifications.
- Information regarding in-person and instructor led trainings they are signed up for.

Creating the New User Account in Docebo

Please enter the user's First and Last Name as it appears on their ID. Do not use nicknames, etc. This will help Power Users avoid creating duplicate accounts for the same user.

First name

0/255

Last name

0/255

New password *

Create a temporary 6-digit password for the user

Retype password *

☒

Force users to change their password at their first login

Turn this toggle button on to green. New users will create their own password upon their 1st login.

User status



IMPORTANT: DO NOT SET AN EXPIRATION DATE. This will impact users' ability to login and renew certificates in the future.

Expiration



☒ Activate user at the end of the creation process

Always enable these 2 toggle buttons (set to green).

☒ 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



What to Know

- You will need to document the username and password you create as you will need to provide this to the user.

Click Next  NEXT CANCEL

Assign New User to Your Branch

This step links the user to your organization (Branch) and is essential for enabling future activities such as reporting.

New user

In order to create a new user, please complete all 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

Your Branch

1. Type in the name of your branch in the search bar to locate your organization (branch)

2. Select your branch.

OCHN Network

Direct Support Professional

External

Internal

1 - 1 of 1

PREVIOUS

Click Next

➔

NEXT

CANCEL

-  **What to Know**
- A user can be linked to **multiple branches**
 - You can only:
 - ✓ View and add user to your branch
-  **Important**
- You **will not see** other branches the user is assigned to

Additional Required Fields

×

New user

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

✓ General information

✓ Branches

3 Additional fields

4 Team Members

Fill in the additional fields

Additional fields that are associated with the branches to which the user has been assigned

Hire/Start Date *

Job Title *

Add job title that makes sense for your organization.

Date of Birth (mm/dd) *

Drivers License # *

Learning Plan Type *

1. Choose the **applicable Learning Plan Type.**

2. This will automatically enroll users into a learning plan with their required training courses.



Important

- All fields with a red * asterix indicates a **required field**. If a field is **Not Applicable** to your branch, you will need to choose N/A so that you can move to the next page.



What to Know

- In addition to adding a learning plan in this step, earning plans and courses can be added from the Docebo Navigation Menu under:

- Courses
- Learning plans

Click Next  **NEXT**

Team Members

New user

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

✓

General information

✓

Branches

✓

Additional fields

4

Team Members

5

Review

Please select all of the team members of the user you are creating

Manager information

1. Start to type your name in the line that reads 'Direct Manager'.
2. A dropdown list of users will appear, select your name.

Power User

Direct Manager B (additional employer ONLY)

1. Leave this blank.
2. This is only for existing user management.

This user manages a team

This toggle should remain OFF for all users you create.

PREVIOUS

CREATE USER

REVIEW

CANCEL



Important

- Select the '**Review**' button at the bottom of the page to ensure accuracy of the new user's information.

Review the New User Information

×

Edit user

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

✓

General information

—

✓

Branches

—

✓

Additional fields

—

✓

Team Members

—

5

Review

From here, you can fully review your user and decide if the information is correct, or if something needs to be edited.

General information

Edit

Additional fields

Edit

Organization

Edit

Username: testuser2

Email: test2@xyxcorp.org

First name: Test2

Last name: Tester2

Level: User

Language: English

Expiration:

Email validation status: Unverified

Date format:

Time zone: America/Detroit

Hire/Start Date: 2026-07-07

Job Title: test

Date of Birth (mm/dd): 0205

Drivers License #: T111-11-1111

Learning Plan Type: None



Need to Know

1. Review the new user’s account information.
2. Make any needed corrections by clicking on the Edit button for the relevant section.
3. Click on CREATE USER button.



Important

1. Once you click on **CREATE USER**, a green message will appear indicating your new user has been successfully created.



Adding Existing User to Your Branch & Team

Step 1: Open the User Menu by clicking on the people icon located on the left side of the page.

Step 2: Search for the user in the “**Search for users**” field.

Step 3: Click on the ellipsis icon (circle with 3 dots) at the end of the row for the **user** and select **edit** from the dropdown menu which will take you to the **User account** page.



Important

If a **User** already has a Docebo account, **do not** create a duplicate account

- Simply add the user:
 - ✓ To your branch and to your team.

Users

...

Import and manage

+ New users/branch

Test

×

🔍

Search all branches...

OCHN Network

Direct Support Professional

External

Internal

Substance Use Disorder

☐	USERNA...	FIRST NA...	LAST NA...	EMAIL	LAST ACC...	CREATIO...	STATUS	LANGUAGE	EXPIRATI...
☐	testuser	Test	Tester	test@xyc...		07/6/2026	✓	English	Step 2 ⋮
☐	DSPTester2	DSP	Tester2	tollont@oa...	07/1/2026	06/4/2026	✓	English	
☐	DSPTester	DSP	Tester	tollont@oa...	07/1/2026	06/4/2026	✓	English	
☐	12047924f	Tester	Testerson III	testemail...		05/27/2026	✓	English	
☐	12047924d	Tester	Test	nomail@e...		04/9/2026	✓	English	
☐	12047924c	Test	Testerson II	nomail@n...		04/2/2026	✓	English	Step 3 ⋮

User Personal Summary

Merge user

Channel

Reset skill profile

Log in as this user

Edit

Delete



What to Know

- Some employees may work for more than one Direct Service Provider.

Adding Existing User to Your Branch & Team

×

Edit user

In order to create a new user, please complete all 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

2 Items Selected

▼ Test Branch

×

Q

📁 OCHN Network

☐ Advocates for Self-Determination

☐ Annextra Healthassist Associates, LLC

☐ Test (for testing)

☒ Test Branch

✓ General information

✓ Branches

✓ Additional fields

4 Team Members

Please select all of the team members of the user you are creating

Manager information

Power User

Tester Test - nomail@email.com

Direct Manager B (additional employer ONLY)

Test Testerson II - nomail@nomail.com

☐

This user manages a team

Step 4: Select tab 2 **Branches** and select your branch.

Step 5: Select tab 4 **Team Members** tab

Step 6: If a Power User name already appears in the ‘Power User’ line’, then you will add your name to the 'Direct Manager B' line by typing your name in the line and selecting yourself from the dropdown menu. Slot B can also be for a Power User.

Step 7: Be sure to click on the Update button at the bottom of the page. The user is now part of your branch and team.

Click on update ➡ **UPDATE** **NEXT** **CANCEL**

New User – Email Notification

1. Upon creating the new user's account, the user will receive an email notification from Docebo (illustrated below).
 - ✓ You will need to send the user their username and password.
 - ✓ The user will be prompted to change their password on their first login.

New User Has Been Created By Admin Inbox x



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!](#)



Enroll the New User into Courses

×

What's next?

Now that you have 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.

Click Confirm  CONFIRM CANCEL

-  **What to Know**
- If you enrolled the User into a **Learning Plan** in the previous step, you will not enroll the user to courses here.
 - Courses can also be added for the user from the Docebo Navigation Menu under:

 Courses

New User Creation: Enrolling User in Courses

Once the new user has been added to Docebo, you are given the option to enroll the user into courses.

×

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

Click next  **NEXT**

How to Enroll Users in Courses

CONTENT AND DELIVERY MENU

Courses

Learning plans

Certificates



Courses

Manage course details and properties

Search within content

Manage enrollments

Search within results...

All Trainings

	CODE	THUMBNAIL	TITLE	TYPE	CREATION DATE	SESSIONS	SESSION WAITING...	ENROLLMENTS	MARKETPLACE
☐	DSP-11A		Medication Educat...	E-learning	05/21/2024			2919	
☐	DSP-Combo		Health & Medicati...	ILT (Instructor	02/20/2024	135		952	
☐	DSP-7Ba		Annual Recipient ...	E-learning	01/29/2024			8025	

Enroll users

Reports

17

Editing an existing user's account

1. From the Navigation Menu, choose the Users menu.
2. Next search for the user you want to view.
3. Then hover over the end of the row and “**click on the ellipsis menu (3 dots)**”.
4. A menu will popup, choose “**Edit**”
5. This will bring you to the user's account page.
6. Edit the information and then “**Click Update**”.

☐	U...	FI...	LA...	E...	LA...	CR...	ST...	LA...	EX...
☐	DS...	DSP	Te...	toll...	06/3/	06/4/	✓	Engli	
☐	DS...	DSP	Te...	toll...	06/4/	06/4/	✓	Engli	⋮
☐	12...	Te...	Te...	tes...		05/2/			
☐	12...	Te...	Test	no...		04/9/			
☐	12...	Test	Te...	no...		04/2/			
☐	12...	Test	Te...	no...		03/3/			
☐	12...	Test	Po...	no...		03/9/			

User Personal Summary

Channel

Reset skill profile

Log in as this Power User

Jump to the Power User's profile

Edit

Delete

×

Edit user

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

1 General information

2 Branches

3 Additional fields

4 Team Members

Please provide the information for the user you are going to create

User information

UUID: 861f8e97-128f-4cf2-b0d2-c5fe28e42d33

Username *

12047924f

Level

User

Email

testemail@email.com

Email validation status

Unverified

First name

Tester

Last name

Testerson III

New password

6/255

Retype password

13/255

☒

Force users to change their password at their first login

User status

Expiration

UPDATE

NEXT

CANCEL

Updating A User's Status

- 1. Go to the **Navigation menu**
- 2. Select the **People icon > Users** to open the Users page
- 3. Search for the **User**.
- 4. In the **Status** column, click the icon next to the user's account to toggle between:
 - Activated (green check mark) — user has access.
 - Deactivated (dimmed circle) — user is blocked from logging in.

☐	USERNA...	FIRST NA...	LAST NA...	EMAIL	LAST ACC...	CREATIO...	STATUS	
☐	testuser	Test	Tester	test@xyxc...		07/6/2026		 User is active.
☐	DSPTester2	DSP	Tester2	tollont@oa...	07/1/2026	06/4/2026		 User is deactivated.

Updating Multiple Users' Status

If you want to change multiple users at once:

- 1. Select the checkboxes next to the users.
- 2. Click **Choose action > Status**.
- 3. Select **Activate** or **Deactivate** for the selected users.

☐	12047924b	Test	Testerson	noemail@...	03/31/2026	✓	English	
☐	12345678b	Test	Power User	nomail@g...	03/9/2026	✓	English	
☐	Test CLCR ...	Power	User	nomail@g...	07/1/2026	12/17/2025	✓	English
☒	Test Direct...	Direct Clini...	Test User	nomail@g...	12/10/2025	12/10/2025	✓	English
☒	Test Crisis ...	Crisis Servi...	Test	nomail@g...	04/9/2026	12/10/2025	✓	English

Activate

Deactivate

Branches

Export

Give manager permissions

Reset skill profiles

Export certificate history

Send activation notification

Status

Edit

Delete

CHOOSE ACTION

2 Items selected

SELECT ALL

DESELECT ALL

For technical support with Docebo fill
out the:

Power User Support Request Form