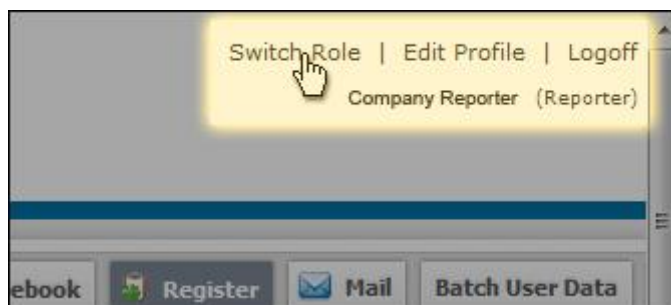




## Add New User Instructions

Please read these step-by-step instructions for adding users to your LMS.

1. Log in to your account as an Admin or Reporter (your role is listed in the upper right-hand corner of the screen). You may have to click **Switch Role** if you are also enrolled in a course as a student.



2. On the left-hand control panel, click on **Manage Users** under the Users tab.





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3. Click on the **Add User** button at the top of the page.



4. The Add User pop-up will appear. You may now enter your new user's information. The **User Profile** is the first tab you will see. *Fields with a "\*" are required.*

**User ID:** This is the user's Logon ID. Must be alpha numeric only. The only exception is a "@" and "." typically found in an email address.

**Name:** First, Middle Int, and Last

**Email:** External email address

**Password:** The initial password you assign the user for logging into the account.

**Password Expirations:** There are 4 different types of Password expiration that you can set up for a user:

1. Password Never Expires
2. User Cannot Change Password
3. User Must Change Password At Next Login
4. Password Expires Every 45 Days

**Privileges:** Default is Student (no selection). Leave these boxes unchecked.



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5. **Demographics** is the next tab. None of these fields are required.

The screenshot shows a web application window titled "Add User" with a close button (X) in the top right corner. The window has several tabs: "User Profile", "Demographics" (which is selected), "Permissions", "Sub Orgs", "Personal Info", and "User Notes". The "Demographics" tab contains the following fields: "Address" (text input), "City" (text input), "State/Province" (dropdown menu), "Zip/Postal" (text input), "Country" (dropdown menu), "Phone" (text input), "Hire Date" (text input), and "Accepted Terms of Use" (checkbox). At the bottom of the window are three buttons: "Save", "Close", and "Help".

Address  
City  
State/Province  
Zip/Postal  
Country  
Phone  
Hire Date



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6. Next, click on the **Sub Orgs** tab. This tab will show custom fields that have been set up for your company. These fields are typically used for grouping sets of students together, but can be used for any custom data fields not already provided for in the **User Profile** or **Demographics** tabs.

The screenshot shows a window titled "Add User" with a close button (X) in the top right corner. Below the title bar are six tabs: "User Profile", "Demographics", "Permissions", "Sub Orgs", "Personal Info", and "User Notes". The "Sub Orgs" tab is currently selected. The main area of the window contains four dropdown menus, each with "-none-" as the selected option. The labels for these dropdowns are "Region", "Area", "Title", and "Supervisor Name". At the bottom of the window, there are three buttons: "Save", "Close", and "Help".



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- Next, click on the **Personal Info** tab. This tab will show custom fields that have been set up for your company. These fields are typically used for additional data specific to each student (e.g. Employee ID, Date of Birth, etc.), but can be used for any custom data fields not already provided for in the **User Profile** or **Demographics** tabs.

The screenshot shows a web application window titled "Add User". It has a tabbed interface with the following tabs: "User Profile", "Demographics", "Permissions", "Sub Orgs", "Personal Info" (which is the active tab), and "User Notes". The "Personal Info" tab contains two text input fields: "Employee ID" and "Birth Date". At the bottom of the window, there are three buttons: "Save", "Close", and "Help".



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8. Finally, click on the **User Notes** tab. This is a free form notes section for the admin, instructor or reporter to fill in. Users cannot see/update this field when updating their profile. Click **Save** at the bottom of the window. Your new user will be added to the system.

The screenshot shows a web application window titled "Add User". It has a tabbed interface with the following tabs: "User Profile", "Demographics", "Permissions", "Sub Orgs", "Personal Info", and "User Notes". The "User Notes" tab is currently selected and active. The main content area of the window is a large, empty text box for entering notes. At the bottom of the window, there are three buttons: "Save", "Close", and "Help".



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