

Peak System Administration Training: Setting Up New Users

Getting Started

Sign in to Peak with your email and password. If you are not on the Home page, click the Home link in the top right corner of your screen.



On the Peak Home page, click System Administration.



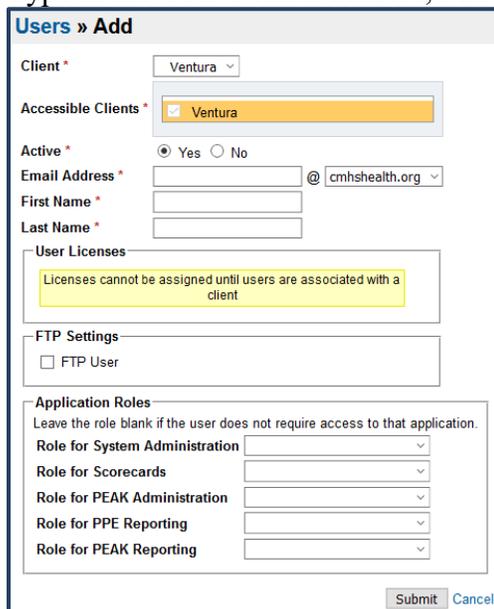
This brings you to the Users Tab of the System Administration application where you will find a table of all users on the server. You can sort and filter this table to find users, as with other tables in Peak.

Creating New Users

1. On the Users Tab, click on +Add User in the top right corner to add a new user profile to the server. For more details about Upload Users, refer to the PowerPoint presentation slides.



2. Type in the User's email address, First Name, and Last Name.



Users » Add

Client *

Accessible Clients * Ventura

Active * Yes No

Email Address * @ cmhshealth.org

First Name *

Last Name *

User Licenses

Licenses cannot be assigned until users are associated with a client

FTP Settings

FTP User

Application Roles

Leave the role blank if the user does not require access to that application.

Role for System Administration

Role for Scorecards

Role for PEAK Administration

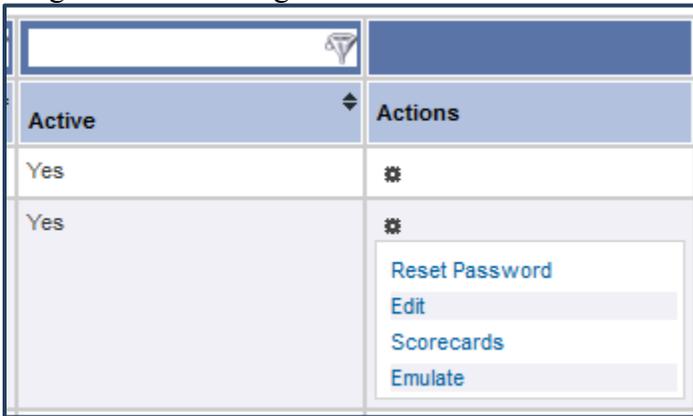
Role for PPE Reporting

Role for PEAK Reporting

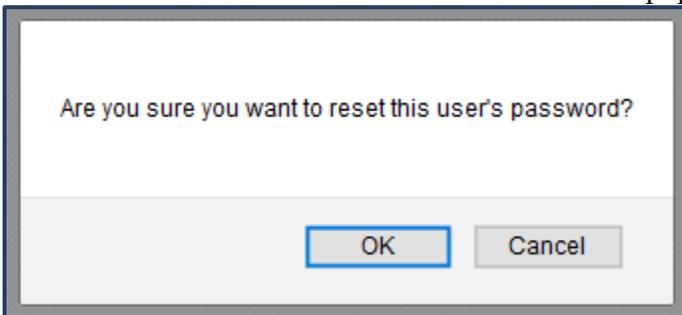
- For Application Roles, click the drop-down menu for each application and select the user's role. For more information about the applications and related Roles, please see User Permissions in Documentation by clicking Documentation in the top right corner and typing "User Permissions" into the search bar.



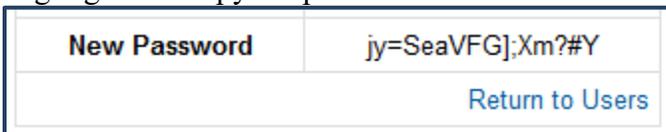
- When you are finished setting the user settings, click Submit. This will take you back to the Users Tab.
- For the user to sign in, a password is needed. Find the user you just added and hover over the gear icon in the right column to reveal Actions for that user.



- Click Reset Password and confirm the reset in the popup box.



- Highlight and copy the password shown on the next page, then click Return to Users.



- Because of the password complexity, it is typically easiest to email this password directly to the user so he or she can copy/paste it into Peak on the first sign-in. The user should then reset the password immediately.

Editing Existing Users

You can edit existing users by hovering over the gear icon in the Actions column.



- **Reset Password** will reset the user's password as described in steps 5-8 above.
- **Edit** will open the user's settings page, like what you saw when creating a new user above.
- **Scorecards** will open a table of scorecard templates on the server so you can enable the user's access to certain templates.
- **Emulate** will allow you to view Peak as the user sees it; click Sign Out to return to viewing Peak as yourself.
- **Manage Encryption Keys** allows you to enable a user's Encryption Key on the server; this only needs to be done once after the user has downloaded his or her private key.
- **Reset Encryption Key** disables the user's existing key so he or she can reset the encryption password and download a new private key.