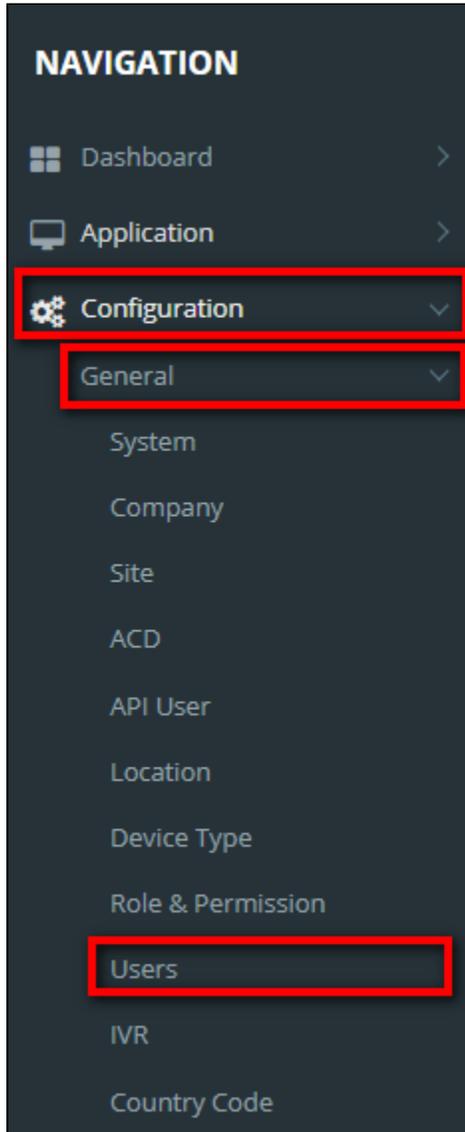


How to manage User at General Configuration

Step-by-step guide

- Go to Linkscope Web application and if you're not already signed in, select **Sign in**.
- From the Linkscope Web application, you click to **Configuration ? General ? Users** at the menu.



ADD NEW A USER

1. Click  button, the **Create Linkscope Web User** popup is displayed.
2. At the **Create Linkscope Web User** popup, you enter **UserName**, **Password** (Min 5 Chars), **Confirm Password**, **Email**.

Create Linkscope Web User ✕

User Name *

Password: (Min. 5 chars) *

Confirm Password *

Email *

Company ▼

Location ▼

Role Membership Applied *

- Administrators
- Agents
- Managers
- Supervisors
- Test Role
- UW Text App Role
- UWRole

Upload Photo

4. Next, select location and set the role for **Membership Applied Role**.

If the creator is assigned to a company, the list of roles/locations only displays the roles/locations that belong to the same company.

Create Linkscope Web User ✕

User Name *

Password: (Min. 5 chars) *

Confirm Password *

Email *

Company ▼

Location ▼ *

Role Membership Applied *

- PRIMA - Administrators
- PRIMA - Agents
- PRIMA - Managers
- PRIMA - Supervisors
- PRIMA - Testers

Upload Photo

Select files...

If the creator is the administrator who is not assigned to any company, display two dropdowns for the admin to select a company and location:

- If **not** select company, display **General roles** only.
- If the selected company is not the default company, display all roles/locations that belong to the same company.

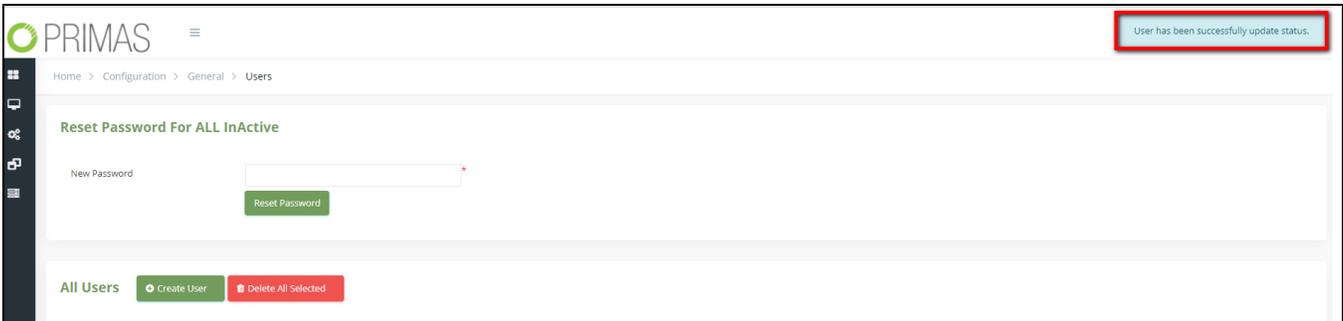
2. Click  button. If you want to **Inactive** that user. There're alert displays after you click to this button. Select **OK**.

labvn68.primas.net:7443 says
Are you sure to Inactive this user?

If you want to **Reactive** that user, click  button. There're alert displays after you click to this button. Select **OK**.

labvn68.primas.net:7443 says
Are you sure to Active this user?

3. Then the system shows this message, you changed successfully the user's status.



The screenshot shows the PRIMAS web interface. At the top right, a green notification box states "User has been successfully update status." Below this, the breadcrumb navigation is "Home > Configuration > General > Users". The main content area is titled "Reset Password For ALL InActive" and contains a "New Password" input field and a "Reset Password" button. At the bottom, there are buttons for "All Users", "Create User", and "Delete All Selected".

• **Lock/ Unlock a user**

When users enter the wrong password more than 3 times, this user's account will be a lock. Or to temporarily prevent a user from logging into the Linkscope Web application, you can change the user's status to Lock. You can unlock a locked user at any time without the need to re-enter user details.

1. On the **All Users** table, select any row you want to lock/unlock the user account.

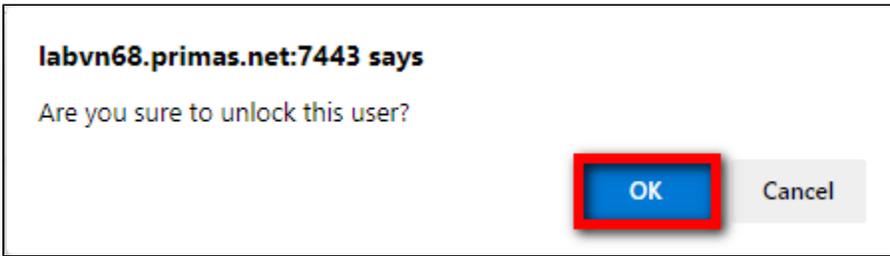


<input type="checkbox"/>	linkscope	admin@primas.net	Administrators	<input checked="" type="checkbox"/>					
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2. Click  button. If you want to **Lock** that user on that row. There're alert displays after you click to this button. Select **OK**.

labvn68.primas.net:7443 says
Are you sure to lock this user?

If you want to **Unlock** that user, click  button on that row. There're alert displays after you click to this button. Select **OK**.



3. Then the system shows this message, you changed successfully the user's status.



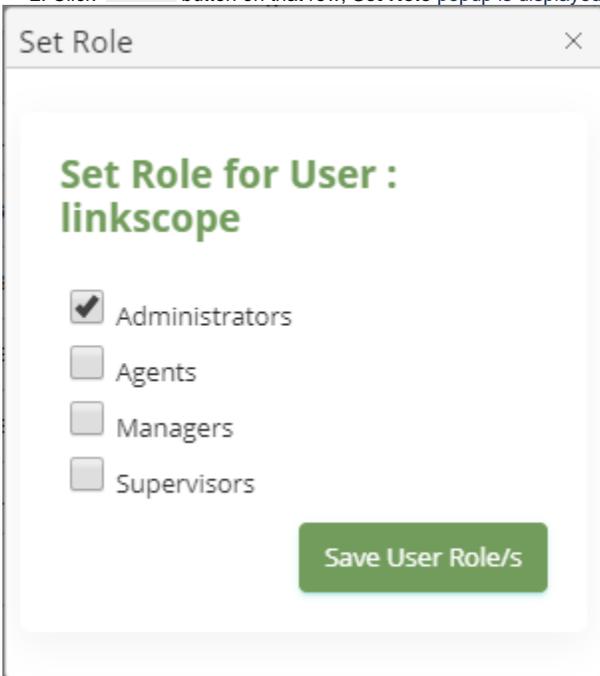
- **Set user's role and permission**

Set user's role and the permission lets you set the new role for any user's account, change the role for any user's account,... from the Linkscope Web application.

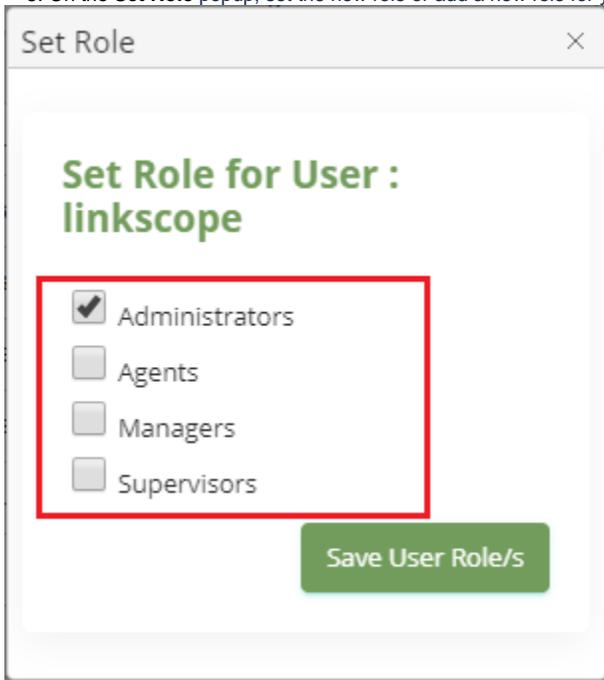
1. At **All User** table, select any row you want to set a new user's role.



2. Click  button on that row, **Set Role** popup is displayed.

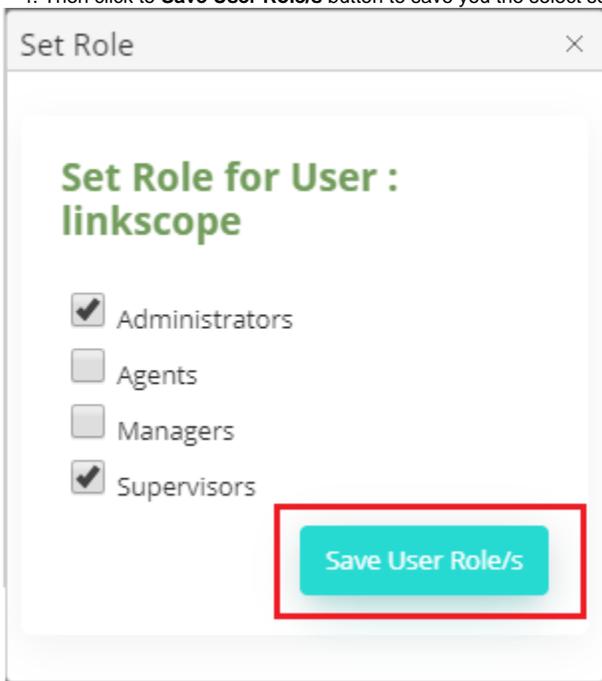


3. On the **Set Role** popup, set the new role or add a new role for your user by clicking to the select box.



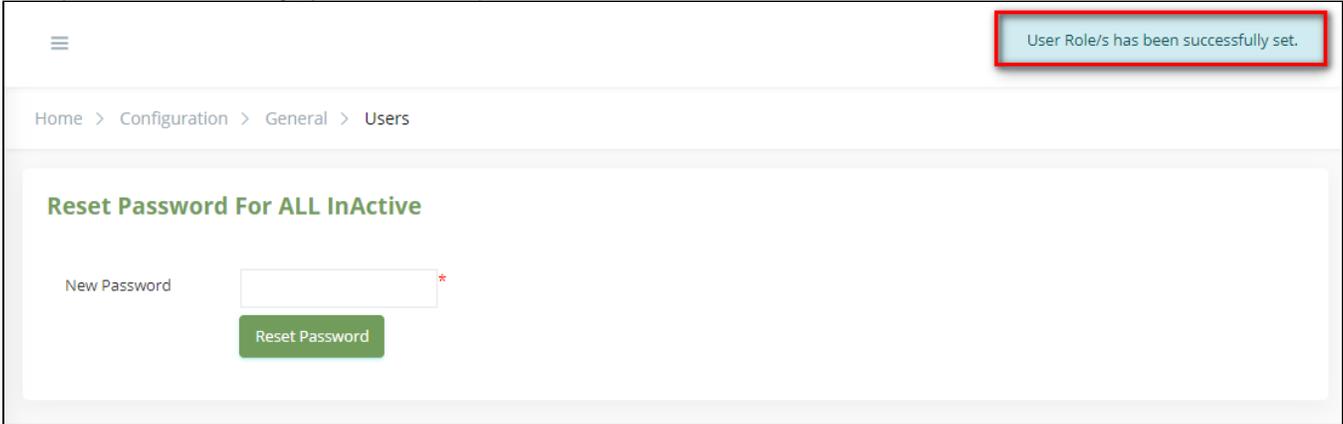
The screenshot shows a 'Set Role' dialog box for user 'linkscope'. The title bar says 'Set Role' with a close button. The main heading is 'Set Role for User : linkscope'. Below this, there is a list of roles with checkboxes: 'Administrators' (checked), 'Agents' (unchecked), 'Managers' (unchecked), and 'Supervisors' (unchecked). A red rectangular box highlights the 'Administrators' checkbox and its label. At the bottom right, there is a green button labeled 'Save User Role/s'.

4. Then click to **Save User Role/s** button to save you the select setting.



The screenshot shows the same 'Set Role' dialog box for user 'linkscope'. In this view, both 'Administrators' and 'Supervisors' checkboxes are checked. A red rectangular box highlights the 'Save User Role/s' button at the bottom right.

If the system shows this message, you set successfully a user's role.



- **Change a user's password**

You can change your user's account password from the Linkscope Web application. If you do not know your user's account password, you cannot change the password.

1. At the **All Users** table, select any row you want to change a new password.

The screenshot shows a table with columns for Name, Email, and Role. A red rectangular box highlights the second row of the table. The row contains the following data: a checkbox, the name "linkscope", the email "admin@primas.net", the role "Administrators", a green checkmark, a green plus icon, a gear icon, an edit icon, and a refresh icon.

	Name	Email	Role					
<input type="checkbox"/>	linkscope	admin@primas.net	Administrators	✓	+	⚙️	✎️	🔄
<input type="checkbox"/>	linkscope5	4000000-000-0000-0000-0000-0000@gmail.com	Administrators	✓	+	⚙️	✎️	🔄

2. Click  button on that row. **Edit** popup is displayed.

Edit ✕

Ignore the password information if you don't want to change it

User Name

Email *

Company ▼

Location ▼

Old Password

New Password

Confirm Password

Upload Photo

3. On the **Edit** popup, you enter **Old Password** and **New Password**, **Confirm Password** into the textbox.

Edit ✕

Ignore the password information if you don't want to change it

User Name

Email *

Company ▼

Location ▼

Old Password

New Password

Confirm Password

Upload Photo

4. Then click to **Update** button.

Edit ×

Ignore the password information if you don't want to change it

User Name	<input type="text" value="linkscope"/>
Email	<input type="text" value="admin@primas.net"/> *
Company	<input type="text" value="Select Company"/>
Location	<input type="text" value="Select Location"/>
Old Password	<input type="password" value="....."/>
New Password	<input type="password" value="....."/>
Confirm Password	<input type="password" value="....."/>
Upload Photo	<input type="button" value="Select files..."/>

If the system shows this message, you change successfully a new user's password.

PRIMAS ≡

User has been successfully modified.

Reset Password For ALL InActive

New Password

All Users

- **Reset the user's password**

If a user forgets the password login to service or if you think their account has been compromised, you can reset their password from the Linkscope Web application.

1. At **All Users** table, select any row, you want to reset the password.

<input type="checkbox"/>	linkscope	admin@primas.net	Administrators	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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2. Click  button. There're displays a dialog for the user to enter the new password after you click to this button.



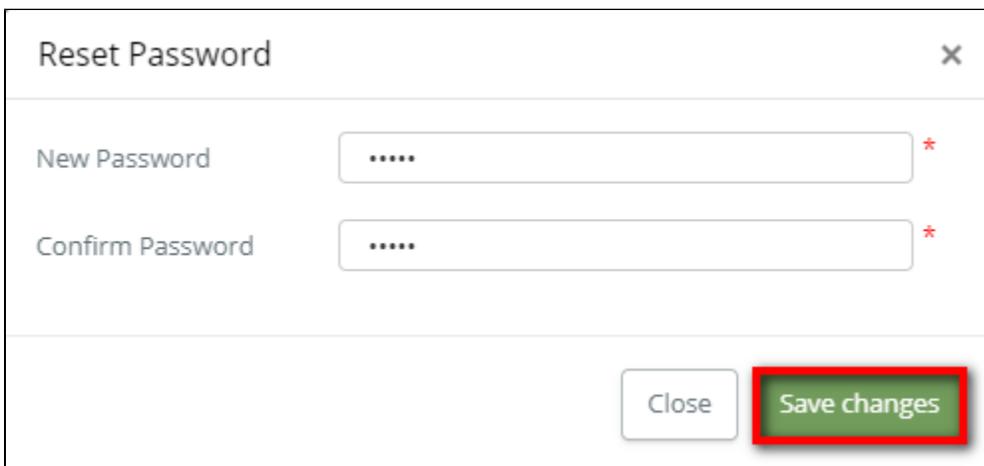
The dialog box is titled "Reset Password" and has a close button (X) in the top right corner. It contains two input fields: "New Password" and "Confirm Password", both with red asterisks indicating they are required. At the bottom, there are two buttons: "Close" and "Save changes".

3. At the Reset Password dialog, you enter **New Password** (Min. 5 Chars - Max. 30 Chars), **Confirm Password**.



The dialog box is the same as in the previous step, but the "New Password" and "Confirm Password" fields now contain five dots (password masking). A red rectangular box highlights these two input fields.

5. Select **Save Changes**.



The dialog box is the same as in the previous step, but the "Save changes" button is now highlighted with a red rectangular box.

If the system shows this message, you reset the password successfully.



The system message "Reset password success" is displayed in a green box with a red border in the top right corner. Below it, the breadcrumb navigation shows "Home > Configuration > General > Users".

SEARCH A USER

On the **All User** table. You can search for a User by searching the **User Name**, **Email Address**, **Role/s**, **Active** or **User Status** field.

1. Search by the **User Name** field:

User Name	Company	Location	Email Address	Role/s	Active	Unlock	Change Role
<input type="text" value="linkscope"/>					Active		
<input type="checkbox"/> linkscope			admin@primas.net	Administrators	<input checked="" type="checkbox"/>		
<input type="checkbox"/> linkscope3			4888800e-e354-4087-8dc8-a32ea719c82@gmail.com	Administrators	<input checked="" type="checkbox"/>		

2. Search by the **Company** field:

User Name	Company	Location	Email Address	Role/s	Active	Unlock	Change Role
	<input type="text" value="Comp1"/>						
<input type="checkbox"/> tester1	Comp1	Default Location	tester1@primas.net		<input checked="" type="checkbox"/>		

3. Search by the **Location** field:

User Name	Company	Location	Email Address	Role/s	Active	Unlock	Change Role
		<input type="text" value="Default Location"/>					
<input type="checkbox"/> tester1	Comp1	Default Location	tester1@primas.net		<input checked="" type="checkbox"/>		

4. Search by the **Email Address** field:

User Name	Company	Location	Email Address	Role/s	Active	Unlock	Change Role
			<input type="text" value="tester1@primas.net"/>				
<input type="checkbox"/> tester1	Comp1	Default Location	tester1@primas.net		<input checked="" type="checkbox"/>		

5. Search by the **Role/s** field:

User Name	Company	Location	Email Address	Role/s	Active	Unlock	Change Role
				<input type="text" value="PRIMA - Testers"/>			
<input type="checkbox"/> QCs	Primas	Dept1	tester@primas.com	PRIMA - Testers	<input checked="" type="checkbox"/>		

6. Search by the **User Status** field:

User Name	Company	Location	Email Address	Role/s	Active	Unlock	Change Role
						<input type="text" value="Lock"/>	
<input type="checkbox"/> Test			testtest@dsad.a	Agents	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Tester2			test1254t@dsad.a	Agents	<input checked="" type="checkbox"/>		

Note:

For better searching, you can fill all given field: the **User Name**, **Email Address**, **Role/s**, **Active** or **User Status** field.

Related articles

- [How to use Phone Lookup](#)
- [How to enable/disable the post call survey feature](#)

- [How to manage Notifier Setting at Screen Pop Configuration](#)
- [How to enable/disable the calls in queue feature](#)
- [How to manage CTI Link at Screen Pop Configuration](#)