

Rmtrx

# goTime Web Portal

User Registration v1.0

David Poarch

6-10-2020

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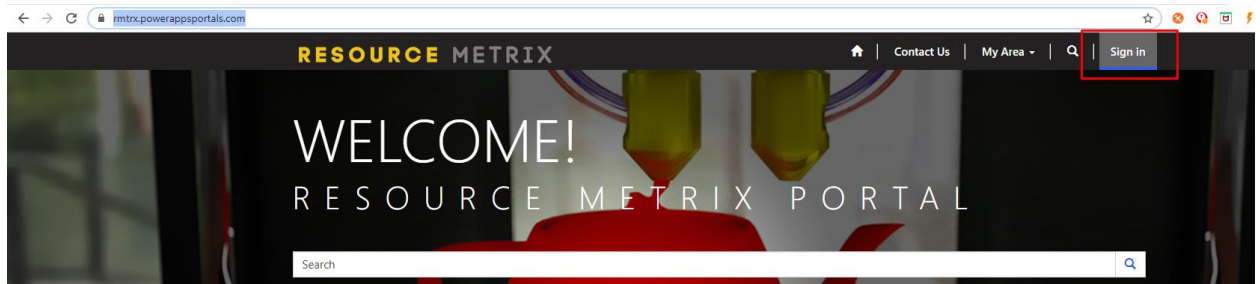
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## 1. Introduction

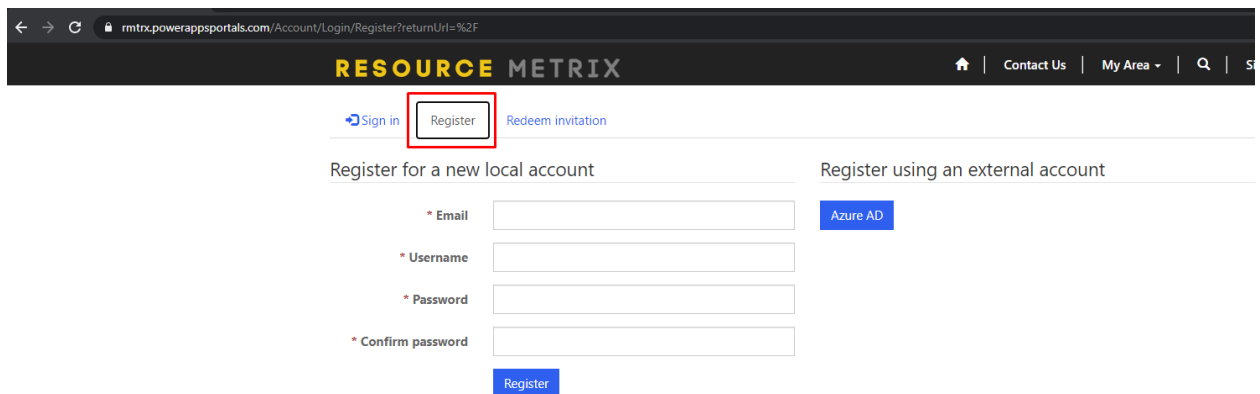
This document provides steps on how to register a user on goTime Web Portal and how to set the permissions in Dynamics CRM.

## 2. Register new user

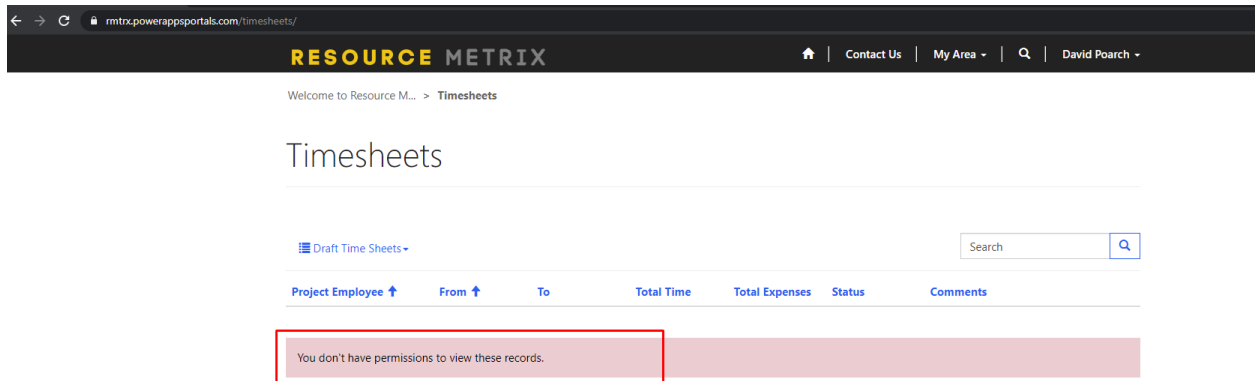
- 2.1. Go to <https://rmtrx.powerappsportals.com/>
- 2.2. Click Sign In



- 2.3. Click Register



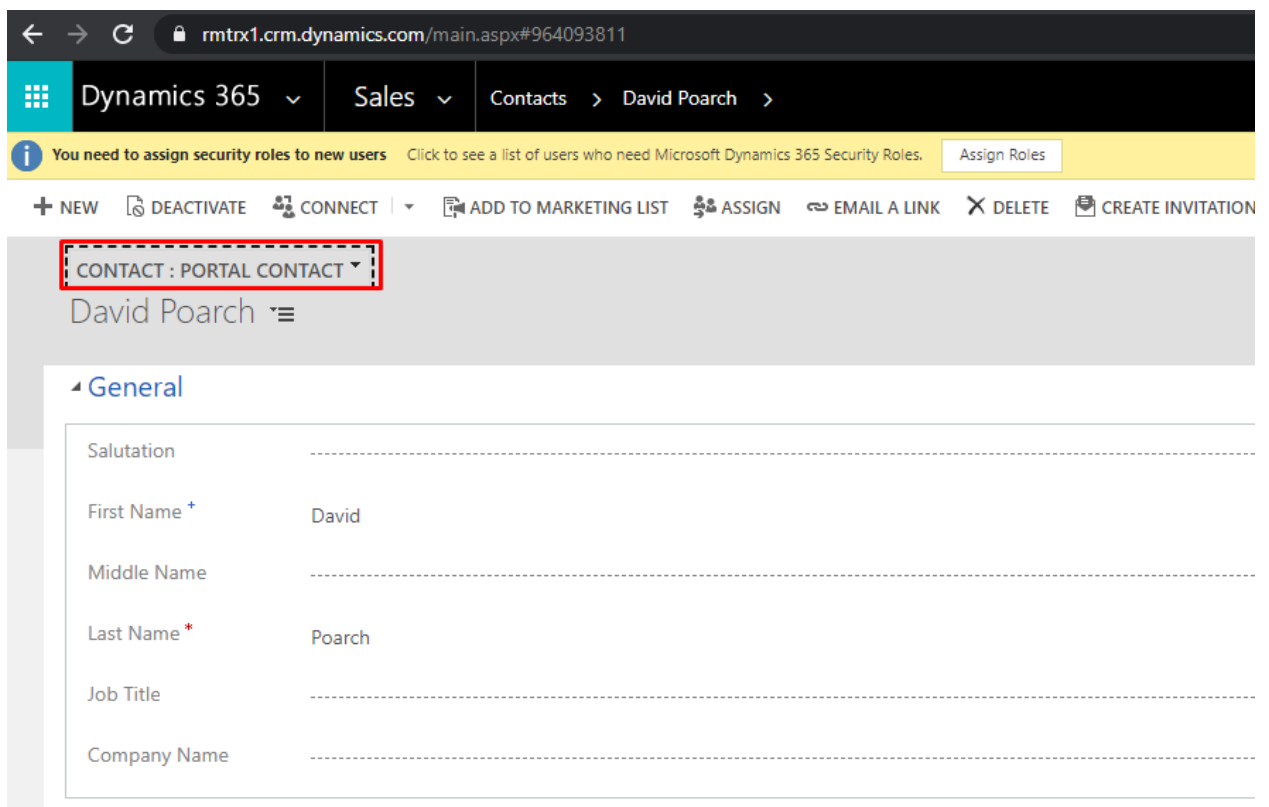
- 2.4. Fill in the form and click the Register button. This will create a contact record in Dynamics CRM.
- 2.5. When you log in and go to the Timesheets, the user will get the error message: "You don't have permissions to view these records."



2.6. To fix the above issue, follow the next steps in setting up the user in Dynamics CRM.

### 3. Setting up the user roles and permissions

- 3.1. Go to <https://rmtrx1.crm.dynamics.com/> and log in.
- 3.2. Navigate to Contacts.
- 3.3. Locate/search for the registered user of <https://rmtrx.powerappsportals.com/> in the list of contacts and select.
- 3.4. Make sure the contact form is Contact: Portal Contact



### 3.5. Go to the Web Authentication section and click Add (+)

The screenshot shows the Dynamics 365 user profile for David Poarch. The 'Web Authentication' section is expanded, showing 'Local Identity' and 'External Identities'. The 'Web Roles' section at the bottom has a table with columns 'Name' and 'Website'. A red box highlights the '+ Add' button in the top right corner of the 'Web Roles' section.

Name	Website
No Web Roles found for this Contact. Select Add (+).	

### 3.6. Select Employee, Vendor, or another appropriate user role.

The screenshot shows the 'Add (+)' dropdown menu in the 'Web Roles' section. The dropdown list includes roles such as 'Administrators', 'Anonymous Users', 'Authenticated Users', 'Employee', and 'Vendor'. The 'Employee' and 'Vendor' roles are highlighted with a red box.

User Name	Identity Provider	Contact	Created On
No External Identities found for this Contact. Select Add (+).			

### 3.7. Log in again on <https://rmtrx.powerappsportals.com/>

### 3.8. Go to Timesheets, and the permission error message should now be gone.

The screenshot shows the Resource Metrix Timesheets page. The page header includes the 'RESOURCE METRIX' logo and navigation links. The main content area shows a table of draft time sheets for David Poarch. The table has columns for 'Project Employee', 'From', 'To', 'Total Time', 'Total Expenses', 'Status', and 'Comments'. The status for all three entries is 'Draft'.

Project Employee	From	To	Total Time	Total Expenses	Status	Comments
2020 CORPORATE DEVOPS - David Poarch	6/8/2020	6/14/2020			Draft	
2020 CORPORATE DEVOPS - David Poarch	6/8/2020	6/14/2020			Draft	
2020 CORPORATE DEVOPS - David Poarch	6/8/2020	6/14/2020			Draft	