

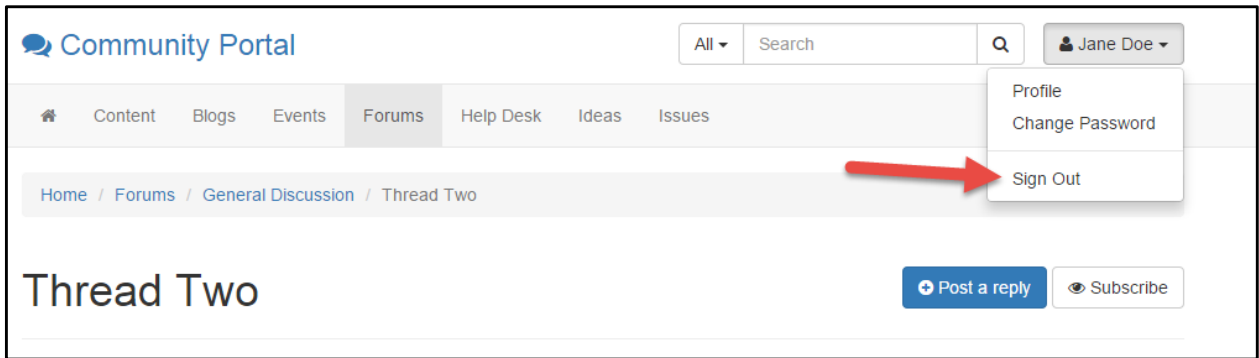
Create Web Roles

At the end of this guide you will be able to create new web roles and assign portal users to those roles.

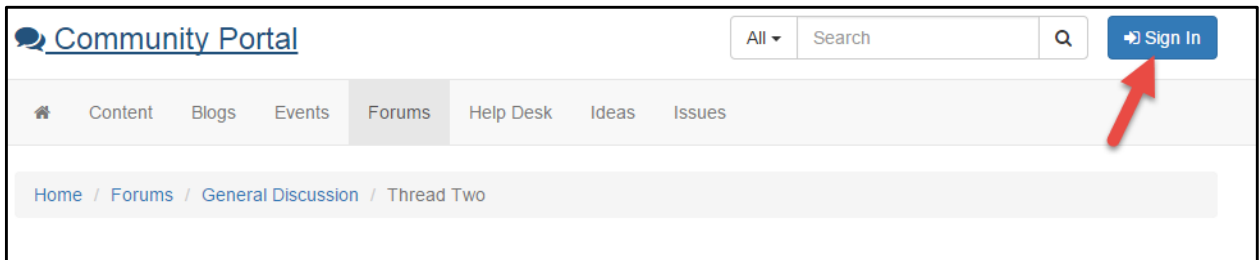
How to Create Web Roles

Once a contact has been configured to use on the portal, it must be given one or more Web Roles in order to perform any special actions or access any protected content on the portal. In the steps below you will create a new Web Role for Forum Moderator. The members of this Web Role will be able to edit and/or delete forum contents.

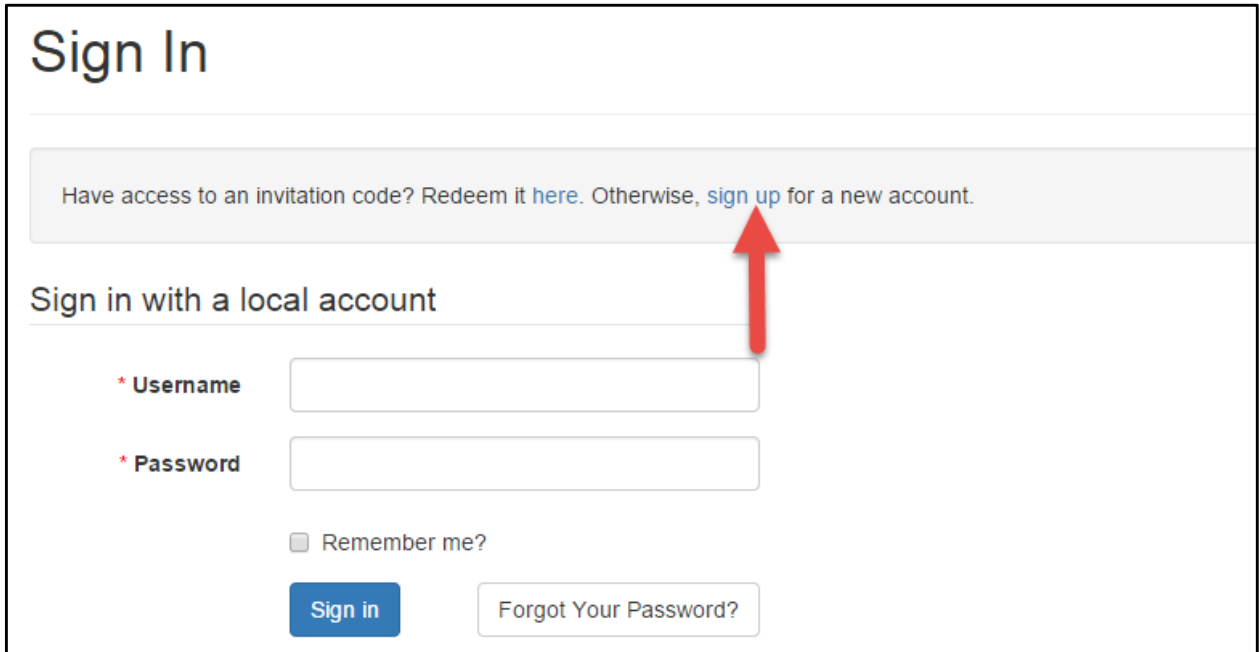
- 1) You will first create a new Portal user. Navigate to your Portal and Sign Out.



- 2) Click Sign In.



- 3) Click Sign Up.



Sign In

Have access to an invitation code? Redeem it [here](#). Otherwise, [sign up](#) for a new account.

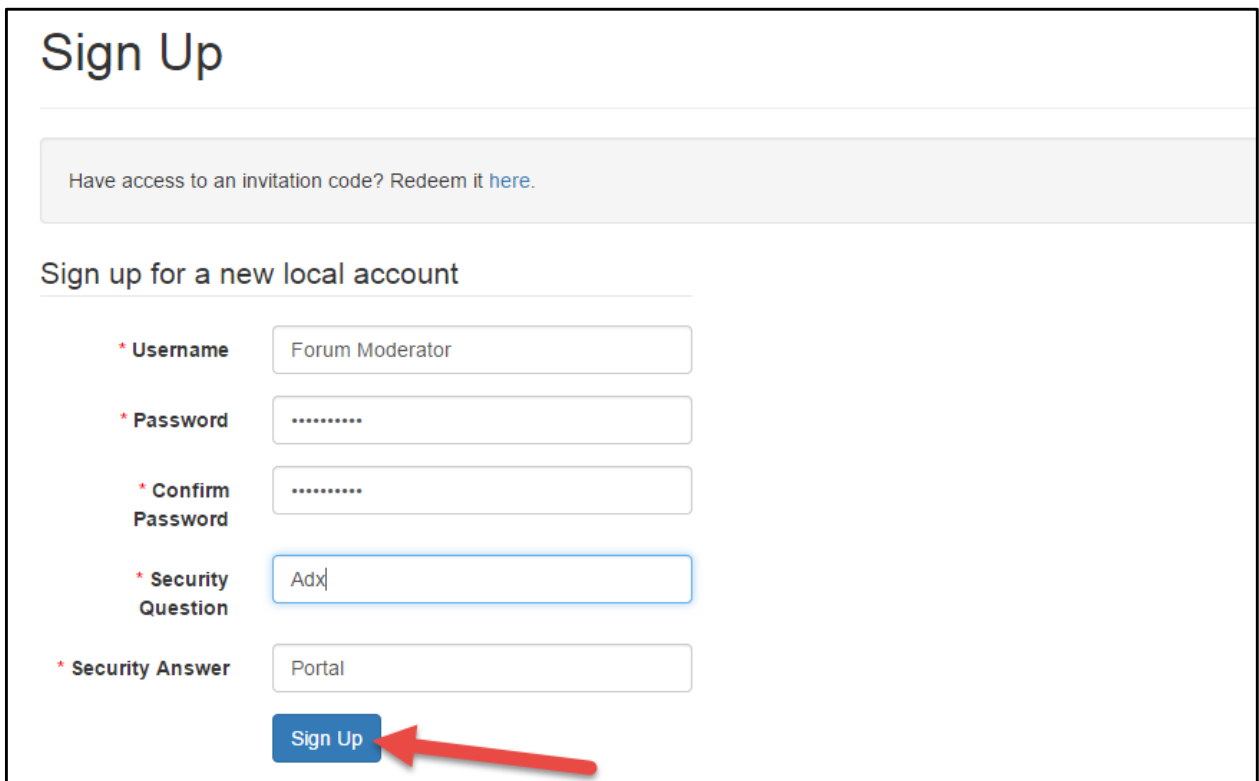
Sign in with a local account

* Username

* Password

Remember me?

- 4) Fill out the form as shown below and click Sign Up:



Sign Up

Have access to an invitation code? Redeem it [here](#).

Sign up for a new local account

* Username

* Password

* Confirm Password

* Security Question

* Security Answer

5) Provide the required information and click Update.

Profile

Please provide some information about yourself.

The **First Name** and **Last Name** you provide will be displayed alongside any comments, forum posts, or ideas you make on the site.

The **Email Address** and **Phone number** are required but will not be displayed on the site.

Your **Organization** is required, and a **Title** is optional. They will be displayed with your comments and forum posts.

Your Information

First Name * Forum **Last Name *** Moderator

E-mail * ForumModerator@domain.com **Phone Number**

Mail

Update

6) You will now create the Forum Moderator Web Role.

Go to your Dynamics CRM, navigate Portals | Web Roles and click New.

Microsoft Dynamics CRM | PORTALS | Web Roles

+ NEW | DELETE | COPY A LINK | EMAIL A LINK | RUN REPORT | EXPORT TO EXCEL | IMPORT DATA

Active Web Roles

Name	Website
Administrators	Community Portal
Authenticated Users	Community Portal
Blog Authors	Community Portal
Event Managers	Community Portal

Create Web Roles

- 7) Enter "Forum Moderator Role" for name.
- 8) Select your Portal and click Save.

PORTALS Web Roles New Web Role

SAVE SAVE & CLOSE NEW FORM EDITOR

WEB ROLE : INFORMATION

New Web Role

General

Name * Forum Moderator Role

Website * [Community Portal](#)

Description --

- 9) You will now add Portal users to the Web Role. Locate the Contacts section and click to expand.

Forum Moderator Role

Authenticated Users Role No Anonymous Users Role No

[Contacts](#)

Full Name ↑	E-mail	Company Name	Business Phone
No Contact records found.			

Create Web Roles

10) Click Add.



Forum Moderator Role

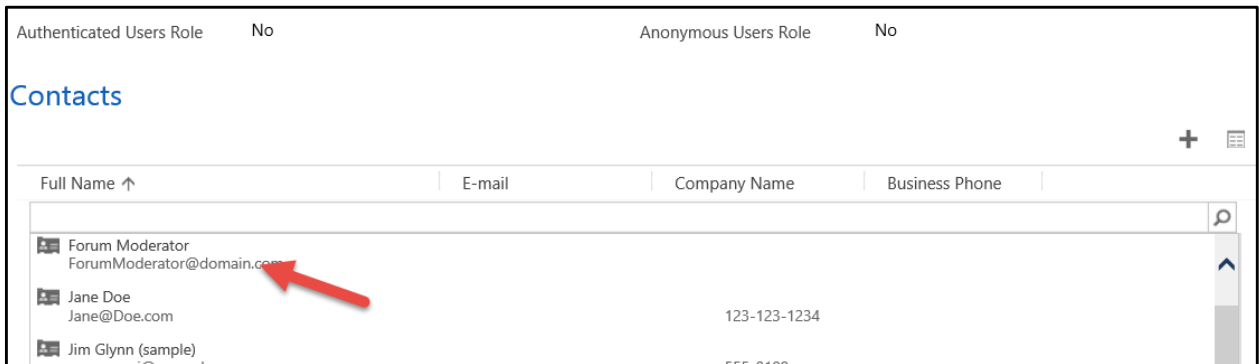
Authenticated Users Role No Anonymous Users Role No

Contacts

Full Name ↑	E-mail	Company Name	Business Phone
No Contact records found.			

A red arrow points to the '+' icon in the top right corner of the 'Contacts' section.

11) Select the Forum Moderator you created.



Authenticated Users Role No Anonymous Users Role No

Contacts

Full Name ↑	E-mail	Company Name	Business Phone
Forum Moderator ForumModerator@domain.com			
Jane Doe Jane@Doe.com		123-123-1234	
Jim Glynn (sample)			555-9199

A red arrow points to the 'Forum Moderator' entry in the table.

12) You created a Portal user, you created a Web Role, and you added a member to the Web Role. You are now ready to specify what the members of this Web Role are allowed to do. Locate the Web Page Access Control Rule and click to expand.



Website Access Permissions

Web Page Access Control Rules

Name ↑	Website	Right	Web Page	Created On
No Web Page Access Control Rule records found.				

A red arrow points to the 'Web Page Access Control Rules' section title.

Create Web Roles

13) Click Add.




Website Access Permissions

Web Page Access Control Rules

Name ↑	Website	Right	Web Page	Created On
No Web Page Access Control Rule records found.				

14) Click New.



Web Page Access Control Rules

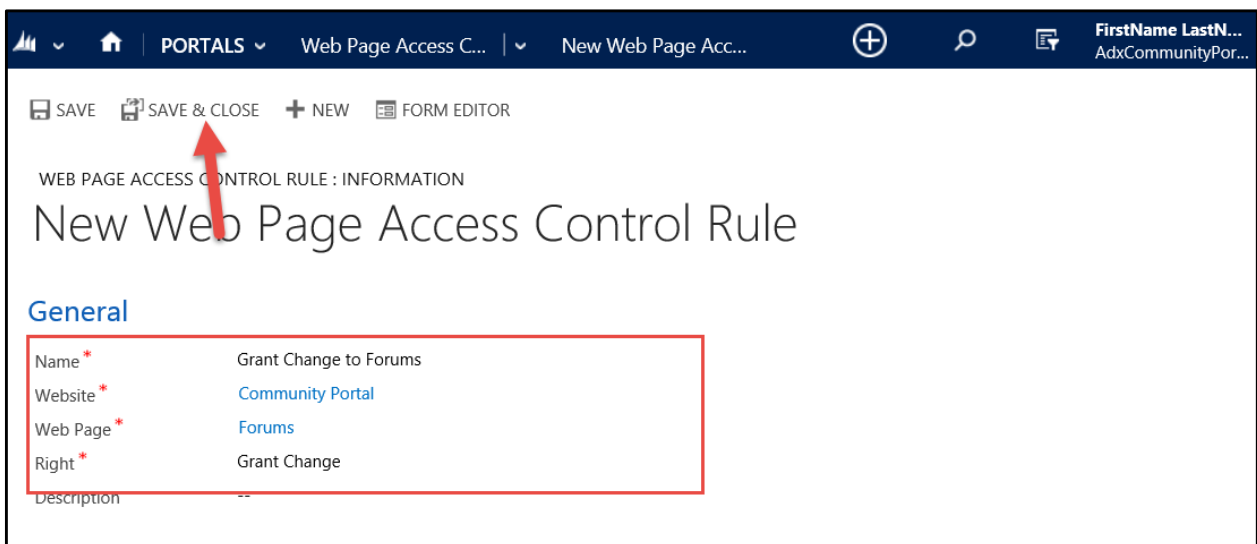
Name ↑	Website	Right	Web Page	Created On
Grant Change to Administrators 2/5/2015 3:19 PM				
Grant change to blog 2/19/2015 3:40 PM				
Grant Change to Content 2/5/2015 3:19 PM				
Grant Change to Events 2/5/2015 3:19 PM				
Grant Change to Forums 2/19/2015 4:25 PM				

[Look Up More Records](#)

5 results

[+ New](#)

15) Enter "Grant Change to Forums" for name, select your Portal from the Website lookup, Select Forms from the Web Page lookup, select Grant Change for Right, and click Save and Close.



PORTALS Web Page Access C... New Web Page Acc...

SAVE SAVE & CLOSE + NEW FORM EDITOR

WEB PAGE ACCESS CONTROL RULE : INFORMATION

New Web Page Access Control Rule

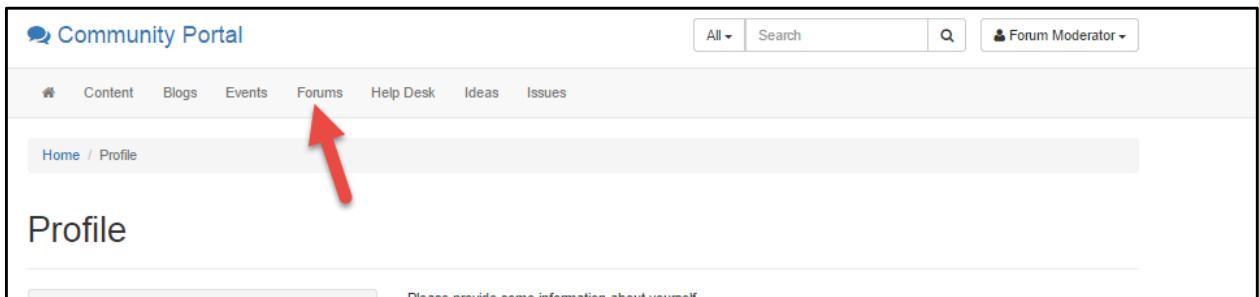
General

Name *	Grant Change to Forums
Website *	Community Portal
Web Page *	Forums
Right *	Grant Change
Description	--

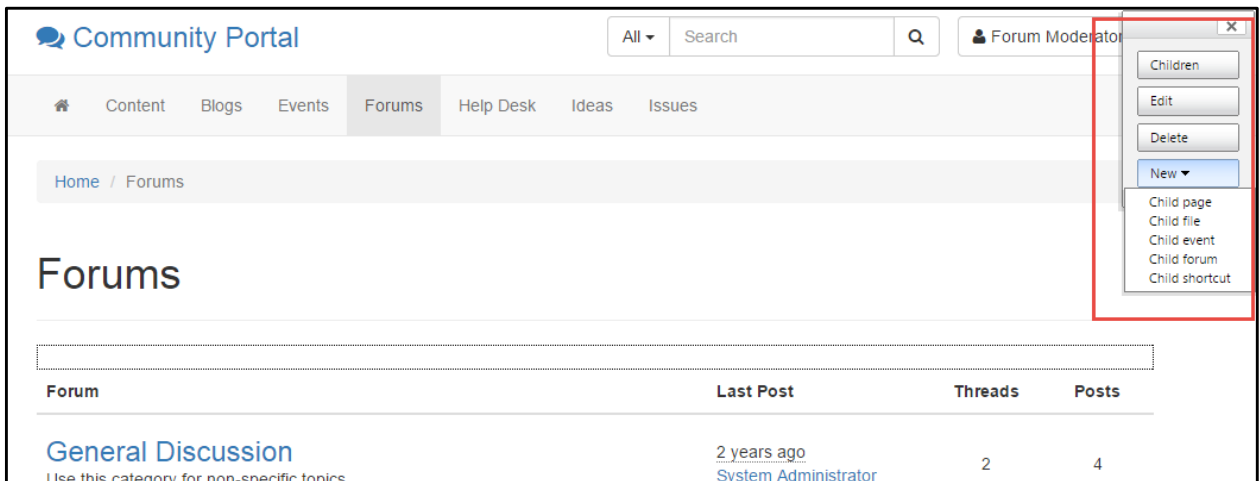
Create Web Roles

16) Go back to the Portal and login as the Forum Moderator.

17) Click Forums.



18) The Forum Moderator can now perform forum administrator tasks.



19) Click on the General Discussion forum.




Create Web Roles

20) Click on Thread One.

Welcome

Thank you for visiting our web site. You are welcome to discuss general topics of interest on our forum.

Thread	Author	Last Post	Replies
Thread Two	System Administrator	2 years ago System Administrator >	1
Thread One 	System Administrator	2 years ago System Administrator >	1

Create a new thread


21) The Forum Moderator can now edit and/or delete threads.

[Home](#) / [Forums](#) / [General Discussion](#) / [Thread One](#)



Thread One



[+ Post a reply](#) [Subscribe](#)

[2 years ago](#)
System Administrator





Pellentesque eros nulla, ultrices venenatis lacinia non, mattis a erat. Maecenas molestie consectetur imperdiet. Maecenas dignissim orci eget odio consectetur at malesuada metus euis...

-  Edit
-  Delete

[2 years ago](#)
System Administrator

Aenean vel justo sed velit commodo viverra. Donec vel purus massa. Proin sodales, eros sed elementum eleifend, metus ligula tincidunt erat, at lacinia odio enim quis mauris. Morbi cursus

This concludes the *Creating Web Roles* guide.

Please proceed to the *Send Invitations* guide.