



## ECGrid Portal: How to Create & Update Different User Authorization Levels

### ECGrid Portal: How to Provide Portal Access to Customers/Users

The Loren Data portal allows Admin users to grant users different role-based access controls. Additionally, Reseller/Partner networks can provide unique portal access to their clients, based on their mailbox. To ensure users have the right access and controls, we have several roles with different access levels, visibility, and edit rights. There are four main roles for ECGrid Customer users:

**MailboxUser:** This role essentially provides a read-only set of capabilities on the portal and cannot add/edit/invite users but has limited management capabilities for a single mailbox. *This is most likely the role you will want to grant to your customers/contractors when you give them individual mailbox access.*

**MailboxAdmin:** This role can add/edit/delete IDs, partnerships, and users for a given mailbox. This is the default role for legacy Hubbub users.

**NetworkUser:** This role is used by our resellers and their Operations teams to search transactions across all mailboxes on a network. This is a limited role for internal employees.

**NetworkAdmin:** This role has full access to customizing the portal, sending notifications, adding/editing users, resending files, and full management of all mailboxes for their customer organizations or trading partners.


#### Creating New Mailboxes

If you are adding a User to a new Mailbox you are creating, [click on Mailboxes](#) in your left side navigation panel. In the upper right-hand corner of the next page, [add the new mailbox name](#), then [click Add](#). If you are a Reseller/Partner network, you will also see the “Portal/No Portal” option. If you want your customers to have portal access to their mailbox(es), [move the box in front of the Add button](#) to “Portal”:

The screenshot shows the ECGrid portal interface. On the left, the 'MY NETWORK' section includes a list of navigation items: Dashboard, Mailboxes (highlighted with a yellow arrow), Data Management, Transactions, Reports, and Notification Feed. On the right, the main content area shows the 'Add' button with a 'Portal' toggle. The toggle is currently set to 'No Portal' (unchecked). A yellow arrow points to the 'Add' button, and another yellow arrow points to the 'Portal' toggle. The user's name 'Crystal Kuczynski' is visible in the top right corner.

Once the mailbox is set up, you will [click on Users](#) under Management in the left side navigation panel, then on the next page, [click Create](#):

#### MANAGEMENT

 Portal

 Notifications

 Users 


 Invite

#ecgrid

Loren Data Corp.

Network ID: 47

Mailbox ID: -1

 Crystal Kuczynski ▾

 [+ Create](#)

Follow these steps:

1. Choose the relevant mailbox from the Mailbox drop down
2. Create a Login Name for your User
3. Create a password for your User (or click Generate Password and we will create one for you)
4. Choose your User's Authorization Level by clicking on the drop down – Auth level explanations are on page 1
5. Choose whether to send a Notification Email to the User
6. Finish the User Contact information on the bottom of the page and click Save

## Create User

List

The create user function only supports the creation of users/admins for a mailbox.

If no portal exists, then the created user will only have API access to the mailbox or be listed in the Mailbox Detail notification dropdowns.

If a portal exists, then the created user will also be able to login to the specified portal for the mailbox.

If you want to create both a new user and mailbox with a portal login, please use the Invite capability from the left side menu.

### Access Information

Mailbox: \*   

Login Name: \*

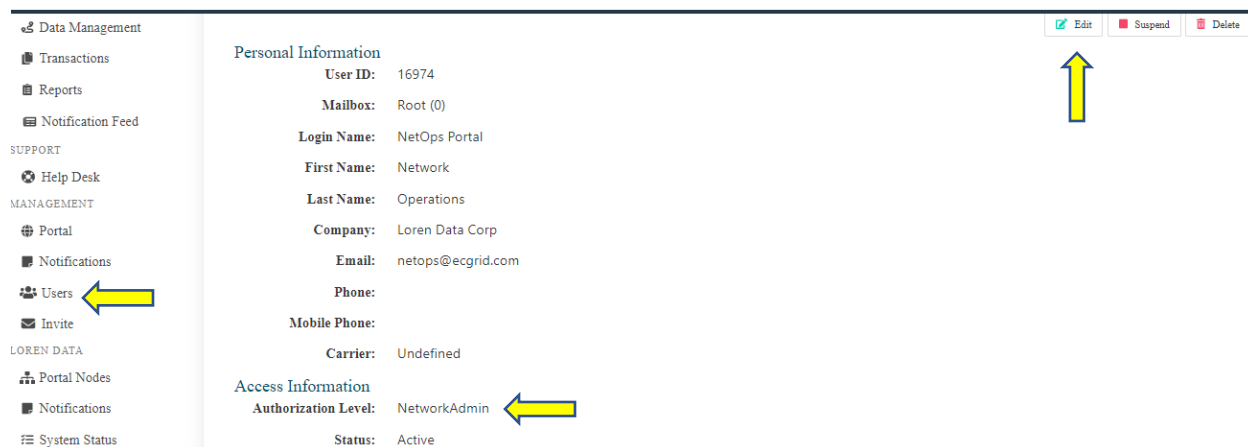
Password: \*  [Generate Password](#)

Auth Level: \*  

Send Notification Email: ☐ No ☒ Yes

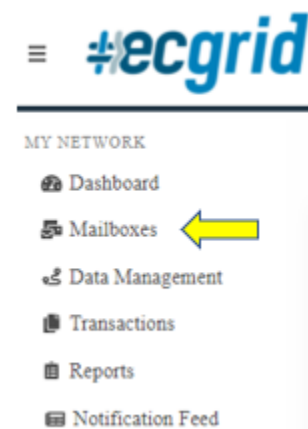
### **Changing Authorization Level for a User**

As NetworkAdmin, you can also change the access level for a user at any time. This is done by going to Users under Management, choosing the User you want to update, then clicking Edit. You can then change the Authorization Level for that User:



### **Providing Portal Access Existing Mailbox Users**

If you have Users on an existing mailbox that you would like to provide portal access to, go to Mailboxes from your left side navigation panel, then click on the name of the relevant mailbox:



59631519	Portal Demo		Mailbox	Active
61239721	New Mailbox 2		Mailbox	Active
63764822	ECGRIDTESTP		Mailbox	Active

On the following page, click “Add Portal”, then click Save at the bottom of the page:

## Mailbox: Portal Demo (59631519)

List **Details** Data Management IDs Trading Partners Connections Reports

### Details

Basic information for this Mailbox. The 'Data Path' directs the data to flow either to the Mailbox for individual processing or to the Root for value added processing.

Portal:

+ Add Portal



Name: \*

Portal Demo

Description:

Data Path:

Mailbox



Owner:

support@ecgrid.com (ECGrid Support)



Once you click save, the portal url is available to you at the top of the page. This information is also sent to the Users of the mailbox.

## Mailbox: Portal Demo (59631519)

List **Details** Data Management IDs Trading Partners Connections Reports

### Details

Basic information for this Mailbox. The 'Data Path' directs the data to flow either to the Mailbox for individual processing or to the Root for value added processing.

Portal: \*

portal-demo.ecgrid2.com



Name: \*

Portal Demo

Description:

Data Path:

Mailbox



Owner:

support@ecgrid.com (ECGrid Support)

