ECGRID PORTAL FAQS

Welcome to the ECGrid Portal! This Portal FAQ documentation is intended to provide you with information on how to use your portal interface. Note: Portal Admins please refer to the "ECGrid Portal Administration" documentation.

Contents

LOGGING IN

How can I access the ECGrid portal?

All current users of ECGrid have access to the portal. If you have logged into the portal before, or into the previous legacy site, you can still use your old Username. If you have never logged in, please contact your ECGrid Portal Administrator who can add you as a User.

What are the supported browsers for using the ECGrid portal?

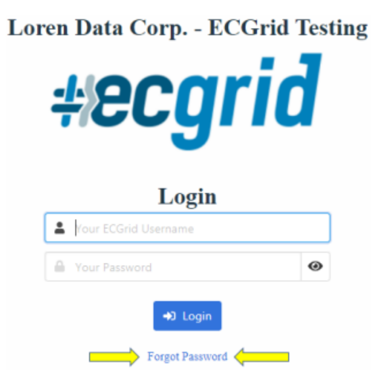
The ECGrid Portal is compatible with all modern/current web browsers (Edge, Chrome, Firefox, etc.).

How do I update or change my profile or password?

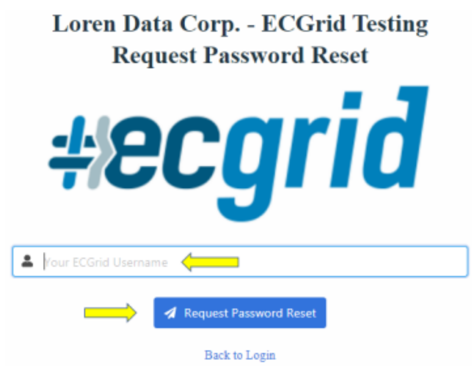
You can change your profile or password by clicking on the dropdown next to your name in the upper right-hand corner, choosing my profile, then clicking Edit:

What if I forgot my password?

If you forgot your password and are unable to log in, you can use the "Forgot Password" function on the login page:



After clicking on Forgot Password, you will be brought to a Password Reset Request page where you can enter your Username and request a new Password. The new password will be sent to you via email.



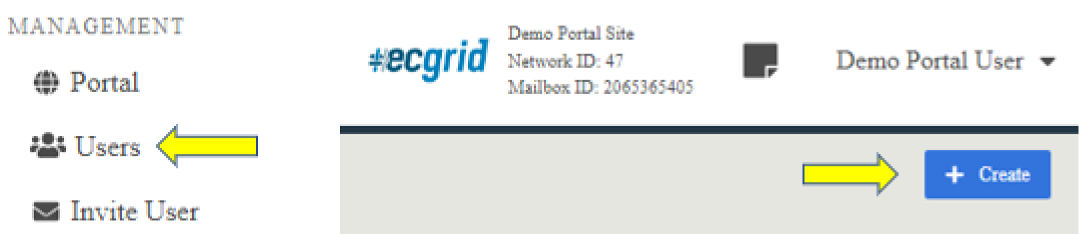
DASHBOARD

How do I invite or disable Users on the portal?

Portal Admin Users can add users from your company to your portal site. Reseller Admins may also provide individual mailbox access to their customers.

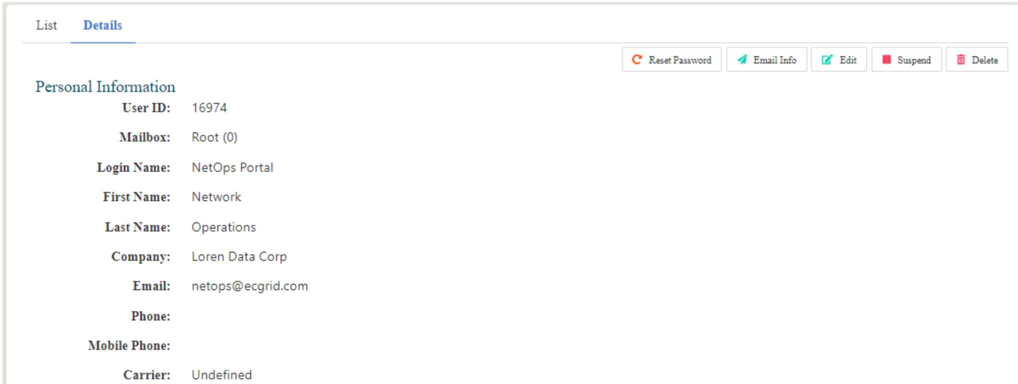
ECGrid Portal User Administration

To add a User, click on "Users" on your left side navigation panel, then click Create in the upper right corner:



On the following Create User page, fill out the required fields and click "Create User". You will then be taken to a Details page that will provide you with the following options:

- Reset Password: Resets a User's Password – an email will be sent directly to the User
- Email Info: Resends login information to a User via email
- Edit: Click to update information or authorization level for a User
- Suspend: To suspend a User (temporary)
- Delete: To delete a User (permanent)



Can I grant different access to users on ECGrid portal?

The portal allows Admin users to grant users different role-based access controls. To ensure users have the right access and controls, we have several roles with different access levels, visibility, and edit rights.

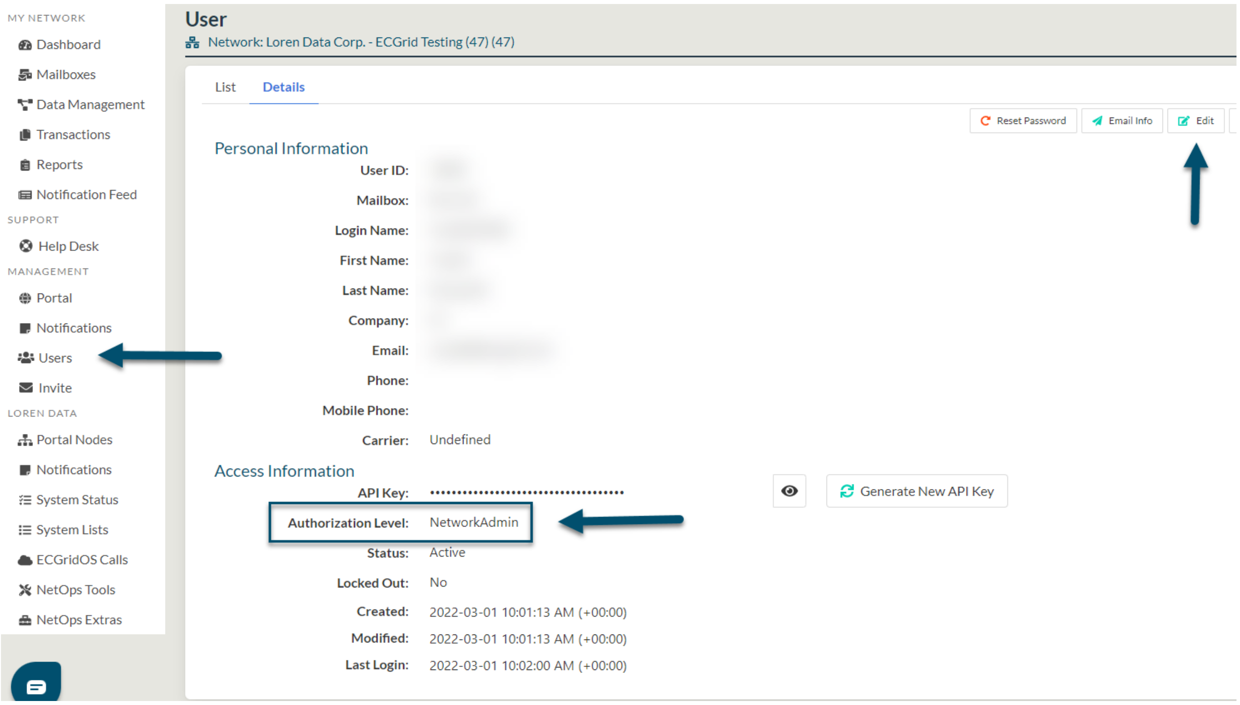
There are four main roles for ECGrid Customer users:

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 regular users. Resellers should use this role for their customers/contractors.***

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

NetworkUser: This role is used by Resellers and their Operations teams to search transactions across all mailboxes on a mailbox. This is a limited role for Reseller’s internal employees.

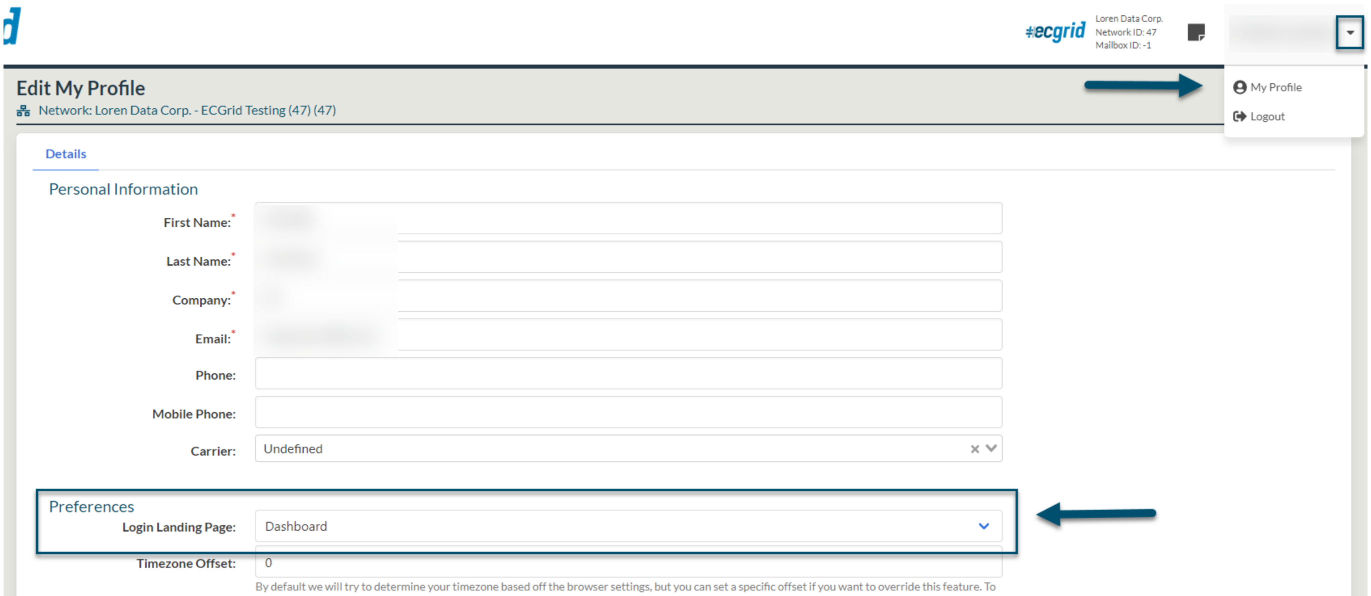
NetworkAdmin: This role is used by Resellers and their Operations teams that has full access to customizing the portal, sending notifications, adding/editing users, resending files, and full management of all mailboxes for their customer organizations or trading partners.



Can I customize my portal experience?

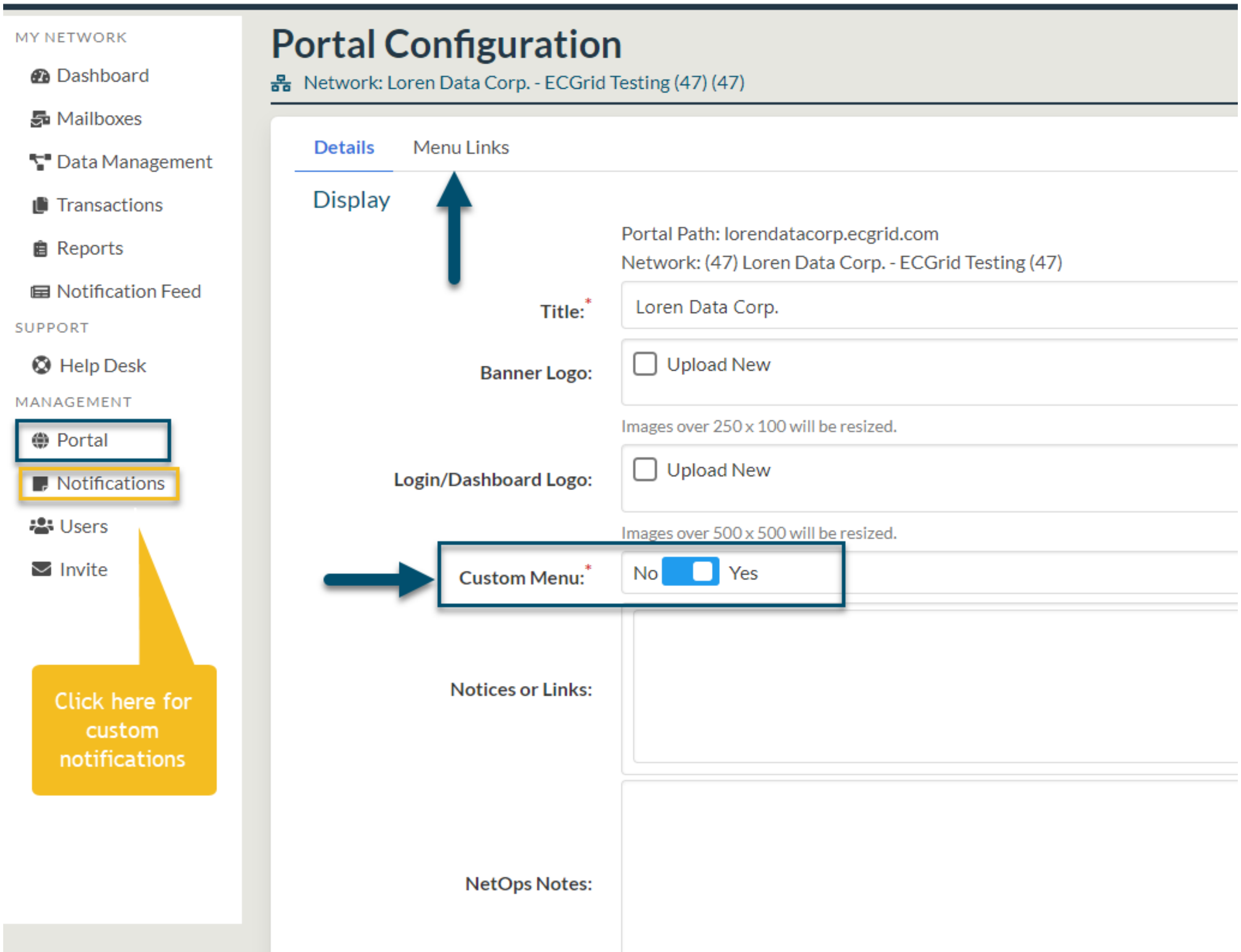
All users have a custom view and access to capabilities based on their role. All users can configure their dashboard by moving, resizing, or deleting modules by clicking on "Edit" in the upper right-hand corner of the dashboard:

By default, the dashboard is configured as the landing page upon login. However, all users can change their default landing page under their profile settings.

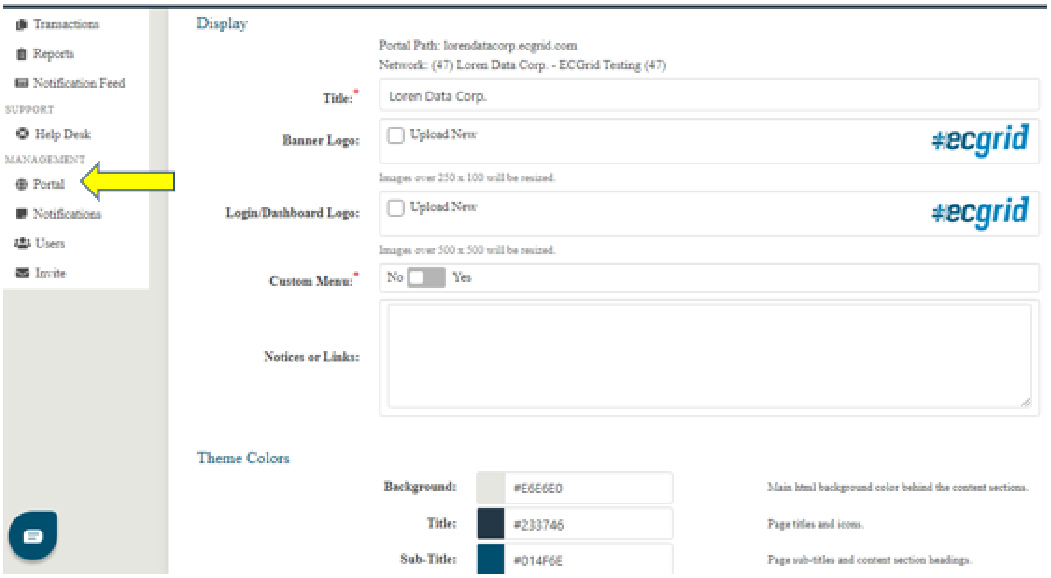


Additionally, users with the Admin roles can edit portal information, which includes sending custom notifications or update portal links and messages to other users.

Admin users can also configure custom menu links by enabling the “Custom Menu” button within the portal configuration screen. This will allow you to set your network specific support links and other URLs for additional information or access.

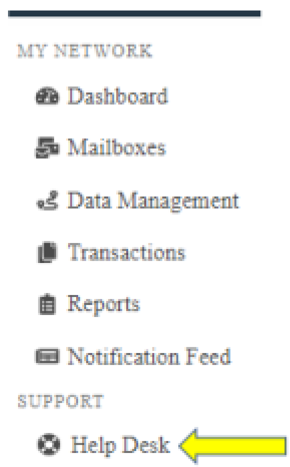


If your user role is NetworkAdmin, you have extended portal customization functions via the portal navigation under the options section, including changing the banner logo and the color scheme throughout to support your organizations branding requirements, as a Reseller or Hub/Enterprise customer.



How do I contact NetOps Support?

The best way to contact Network Operations Support through the Portal is to use the Help Desk link on the left-side navigation panel:



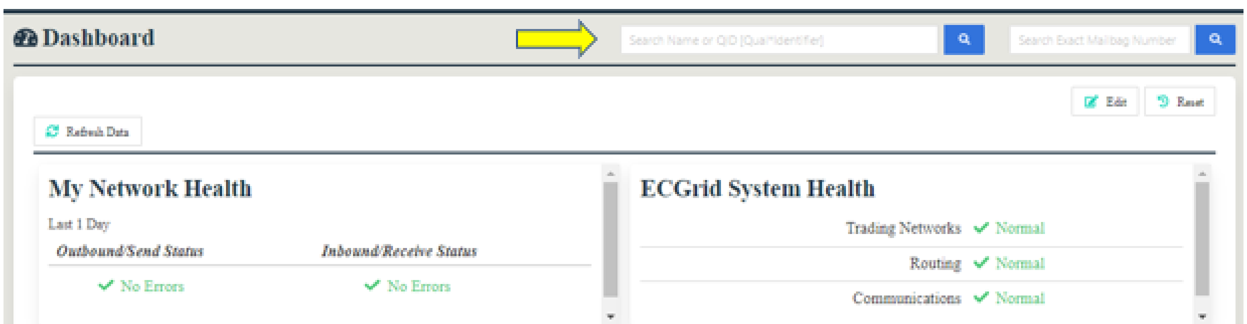
This will take you to the ticketing system where you can create a ticket. Our objective is to respond to tickets on the same day or within 24 business hours. Please remember to include the following information:

- Required
  - Your company name
  - Your EDI ID
  - Your AS2 ID (if using AS2)
  - Your Mailbox number (at the top right of the Portal screen)
  - Your Network Node, if you are a Reseller (top right of the Portal screen)
- If your question is connectivity related

    - Your AS2/FTP/SFTP Username
    - Any error messages or logs you may be receiving
    - When the issue began
    - Your IP address (for FTP/SFTP)
- If your question is regarding missing data
    - Both Sender and Receiver EDI Qualifiers and IDs
    - The approximate date/time the data was sent
    - The ICN (Interchange Control Number)
    - A Mailbag # from the sending VAN or AS2 MDN Message ID, if possible (see below for definitions of Mailbag # and MDN Message ID)

How do I search for an EDI ID on the ECGrid network?

From the dashboard page, you can search for any EDI ID on the ECGrid network. On the top of the page, there are 2 fields. The first field allows you to search by EDI ID:

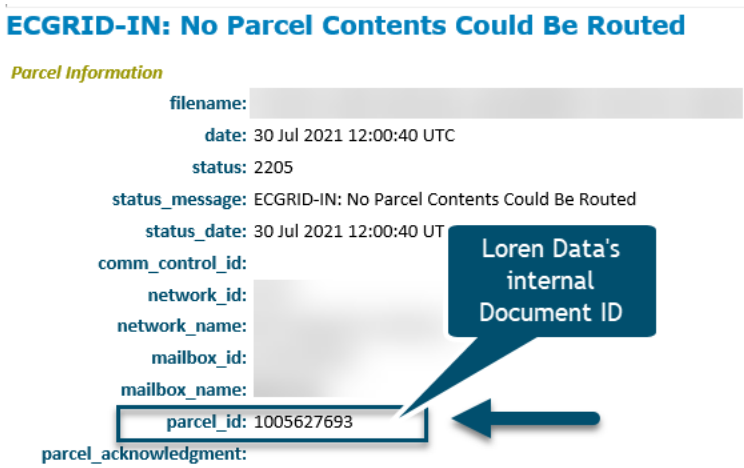


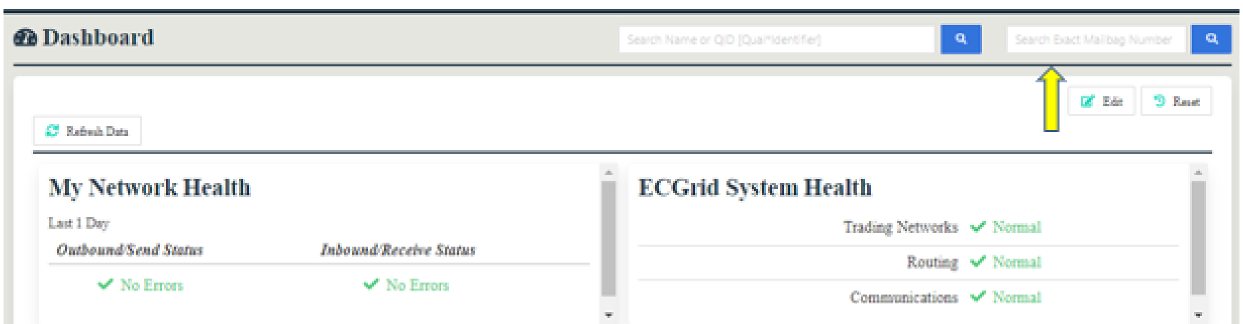
You can search by name or by EDI ID. Here are a few tips for searching:

- If you are searching for an EDI ID without a qualifier, you must include * as a placeholder for the qualifier
- The search engine looks for exact matches, unless a wild card is used
- You can use % as a wild card, both before and after the information you input. Examples for <u>*123 ABC Company*</u>:
    - 123%
    - %ABC%
    - %ABC Company

How do I search for a Mailbag number on the ECGrid network?

You may sometimes receive automated error notices from Loren Data regarding your data flow. These notices will always contain a Mailbag/Parcel #. You can search for these ECGrid internal ID (Mailbag) numbers directly from your dashboard. On the top of the page there are 2 fields. The second field allows you to search by Mailbag number that is included in the email error notification. Please note that you can only search by Loren Data's internal document ID and not another VAN mailbag number.



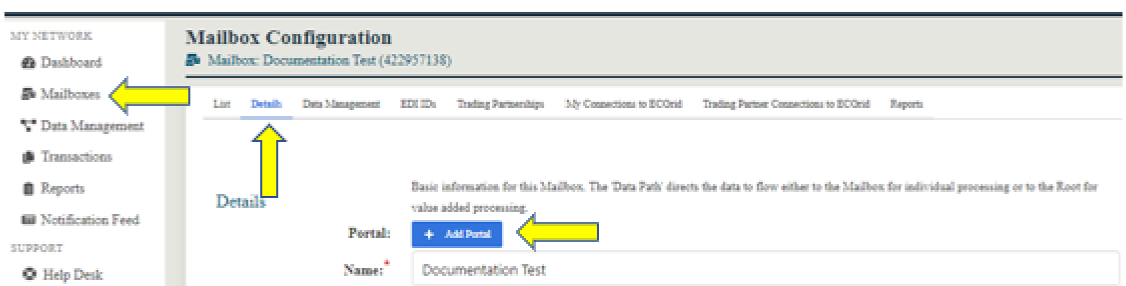


MAILBOX ADMINISTRATION

How do I add a mailbox?

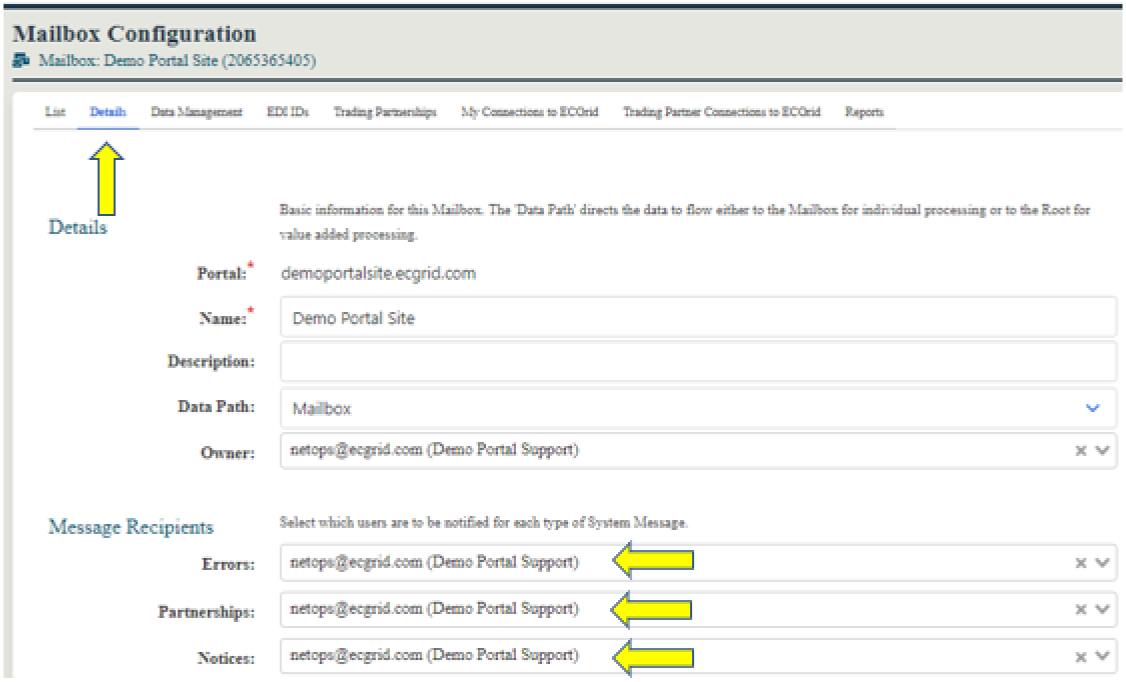
If you are adding a User to a new Mailbox you are creating, click on Mailboxes in your left side navigation panel. In the upper right-hand corner of the next page, add the new mailbox name, then click Add. If you are a Reseller/Partner network, you will also see the "Portal/No Portal" option. If you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

*You can also add a portal site for your customer at a later time by going back to the Mailbox details page, and clicking Add Portal:



Can I change message recipients or who gets notifications?

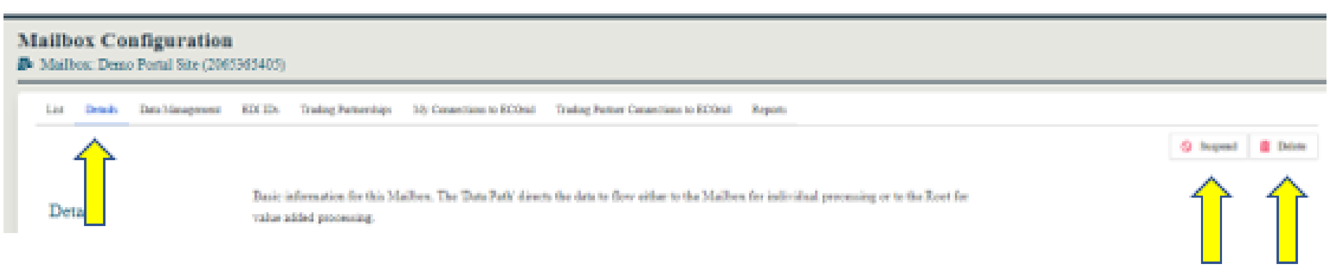
You can choose who gets different notifications by navigating to the Mailbox you want to update, then clicking on the "Details" tab on the top. Choose the Messages you want to update and pick from the drop-down menu:



*We highly recommend you use a distribution list for Errors, Partnerships, and Notices so important messages from Loren Data aren't missed if somebody is out of the office.

How do I suspend or delete a mailbox?

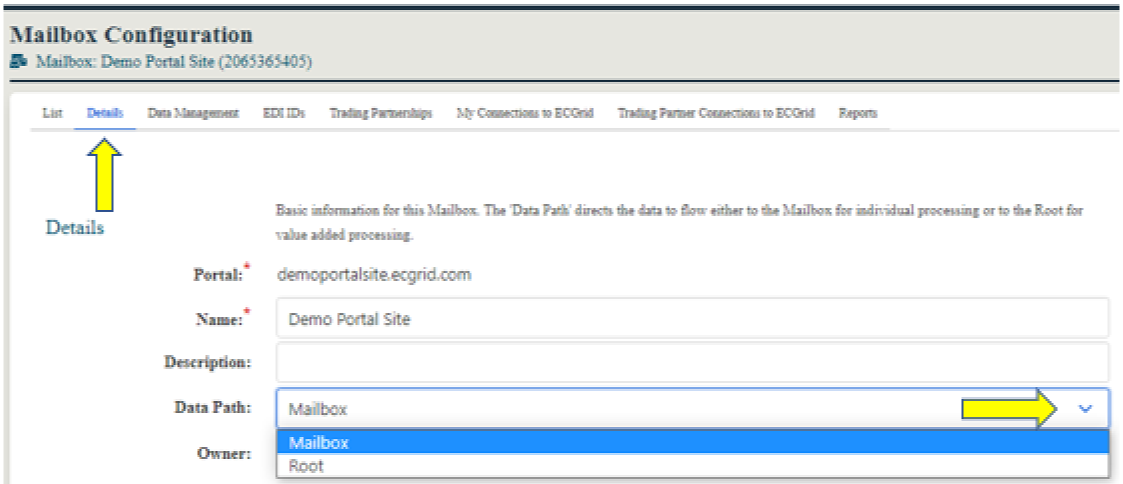
If you have a NetworkAdmin authorization level, you can suspend or delete a mailbox right from your portal. Click on Mailboxes from the left side navigation panel, then choose the correct mailbox from the mailbox list. Once you're on the Details page of the correct mailbox, you will see Suspend and Delete in the upper right-hand corner:



*Please note: Suspending a mailbox is temporary. Once a mailbox is Suspended, you will then see "Unsuspend" in its place. ***Deleting a mailbox is permanent***. *Once a mailbox is deleted, all EDI IDs, trading partnerships, and transaction history will be deleted and cannot be recovered.*

What is a "Data Path"?

Data path is where your connection to Loren Data goes. For ECGrid Mailboxes, you will see "This Mailbox". For ECGrid Network users, you will have a choice between "Root Level" and "This Mailbox"



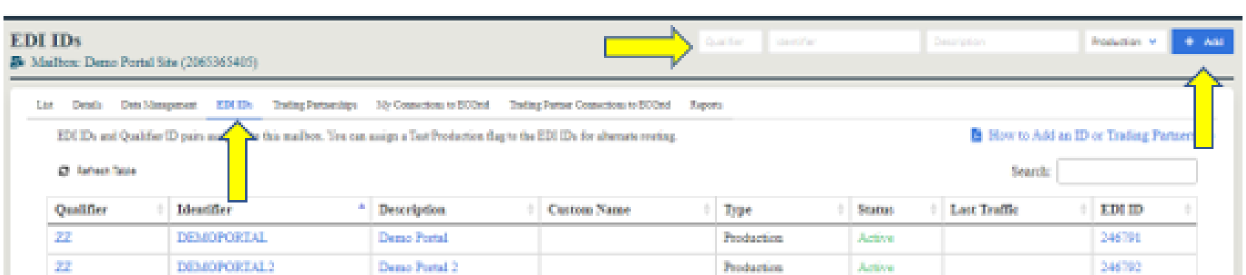
- Root Level: All mailbox data goes to a single connection method located at your network root level. The data will still virtually show on the mailbox, (on the portal for example) not the root, but the data itself will go to the root connectivity method.
- This Mailbox: All data for this specific mailbox will transit via a separate and unique connection method used for this mailbox only.

*Please note: Network Node users (Resellers, etc.) can also choose to do a combination of both, depending on which customer mailbox they are operating on. You can have a connection at the root level where your cloud mailbox data can go and have some mailboxes with discrete customer connections.

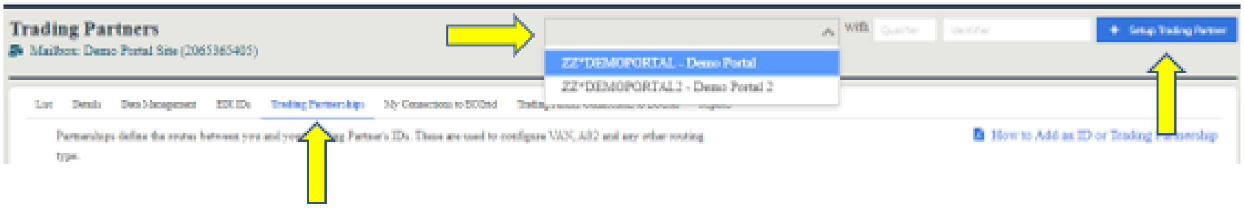
How do I add an ID or Trading Partnership?

All mailbox IDs and trading partnerships are managed by choosing “Mailboxes” on the left side navigation panel. After clicking Mailboxes, you will need to select the specific mailbox you want to add the ID or partnership to, unless you have a single mailbox in which case you will immediately be able to choose “IDs” or “Trading Partners” on the top configuration panel.

To add an EDI ID to your mailbox, click on the “IDs” tab at the top, then enter the qualifier (leave empty for null), EDI ID, and company description, and click Add:



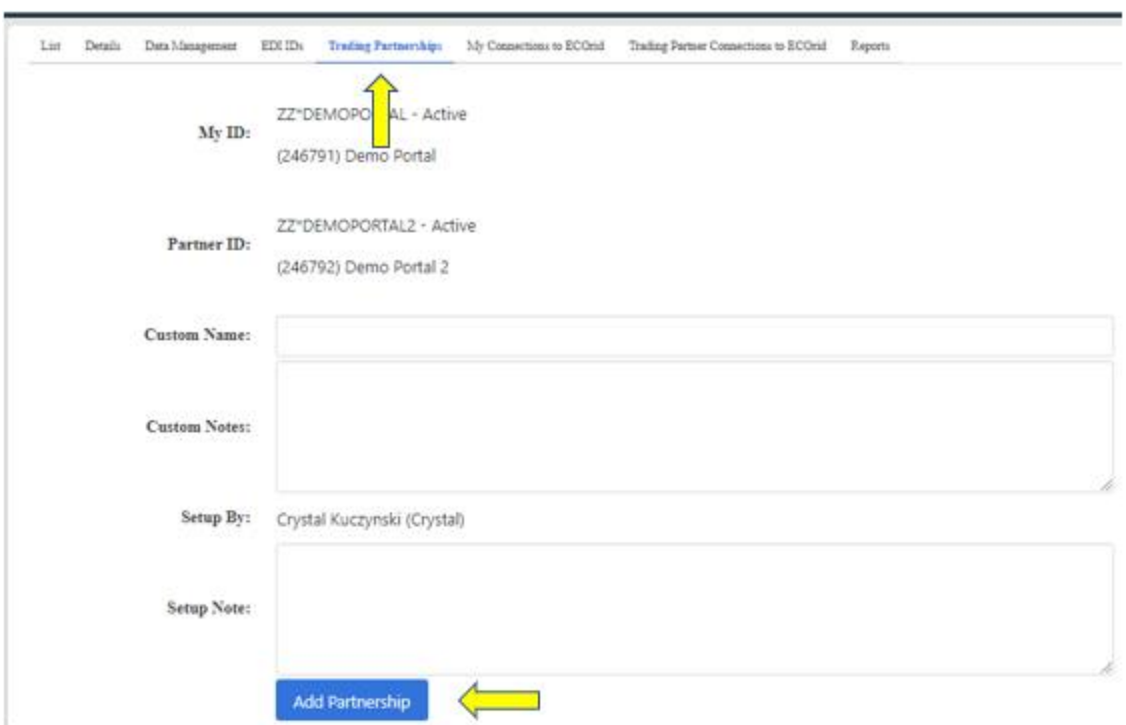
Once you have EDI IDs in your mailbox, you can add your trading partnerships. Click on the “Trading Partners” tab at the top, click on the drop-down menu to choose your EDI ID that you will be setting up, then add the Qualifier & ID of your trading partner. Click the blue “Setup Trading Partner” button, which will take you to a review page.



If the trading partner ID is on our network, you can simply click the blue “Add Partnership” button at the bottom of the page. If the trading partner ID is not on our network, you will need to provide the company name and choose the correct VAN for the ID to complete the partnership. If a trading partner and their EDI IDs are already on our system, the trading partner will be classified as “Completed” and you can begin trading immediately.

**Please note: This does not guarantee the partnership has been added on the trading partner’s VAN. We do send notices to the trading partner’s VAN requesting the partnership is set up on their end, however, most of the VANs require the request come directly from their customer (your trading partner).*

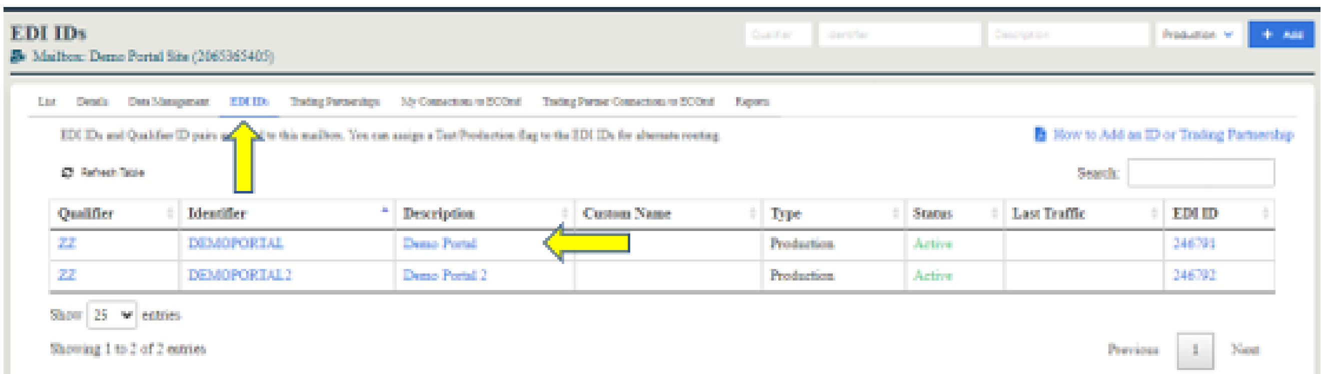
The Add TP function tracks which user set up the relationship and allows for the adding of notes and comments which are only visible to users at your organization, (NetworkUser authorization and above).



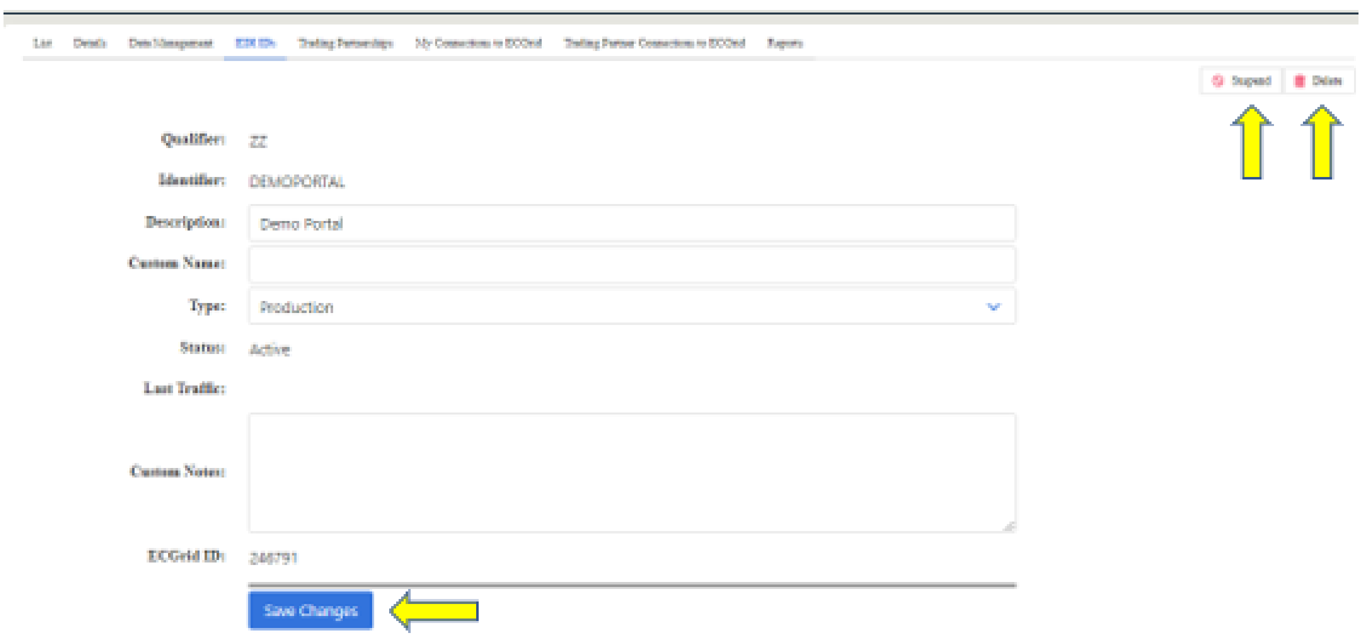
If the trading partner requires an alternative connection, (AS2, SFTP, X.400, etc.), you will need to make this request by contacting NetOps Support. You can contact them by clicking on the "Help Desk" link on the left side navigation panel. Typically, these TP setups are done within 1-3 business days, depending on the responsiveness of the trading partner.

Can I delete an ID or partnership off my network or mailbox?

You can delete an ID and a partnership off your network or mailbox by navigating to the correct mailbox, clicking on IDs tab at the top of the page, then clicking on the blue ID code of the ID you would like to delete:



On the next page, in the upper right-hand corner, you have the option to either Suspend or Delete an ID off the mailbox. Once you've clicked Suspend or Delete, click the blue Save Changes button at the bottom of the page:

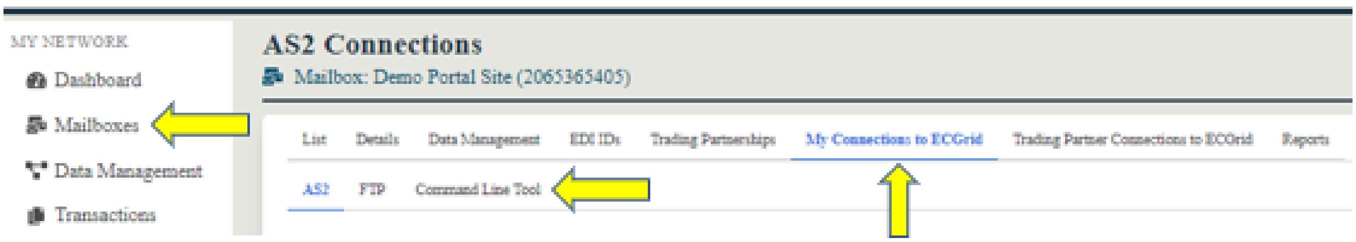


How do I update my connectivity information (AS2 certificates, FTP password, etc.)?

Full details on how to add, update, or change a connection to ECGrid can be found at this link:

Setting up or Updating a Connection on your ECGrid Portal

All connectivity configuration and maintenance can be done by going to Mailboxes/My Connections to ECGrid:

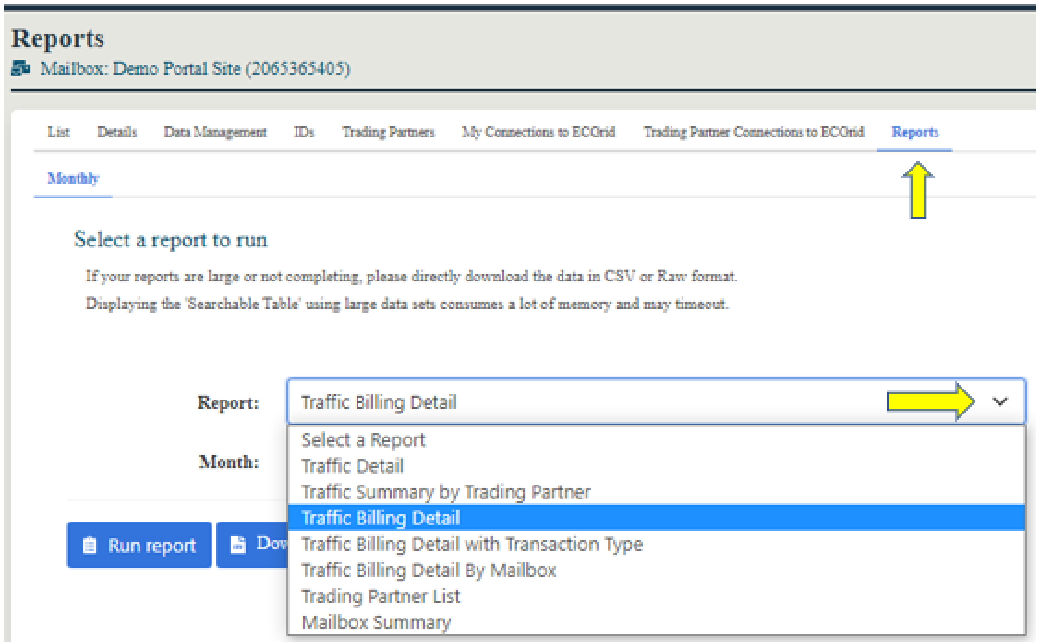


Once you have navigated to the connections tab, you can choose your connection in the secondary navigation panel and edit the information as needed. The portal allows for full self-service configuration and management of your API access, FTP/SFTP, AS2, and X.400. Additional protocols are under development and will be made available in a future release, such as OFTP and AS4 (which can currently be configured by contacting NetOps.)

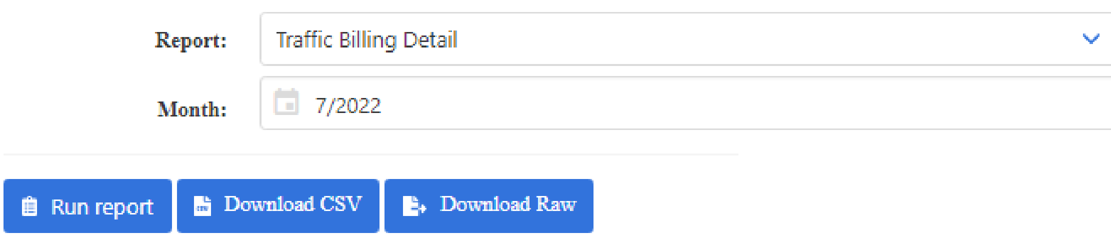
How do I run reports from the portal?

If you are a NetworkAdmin, you can run mailbox level reports by clicking on “Reports” from the top navigation panel. This will give you the option of running the following reports for any mailbox on your network:

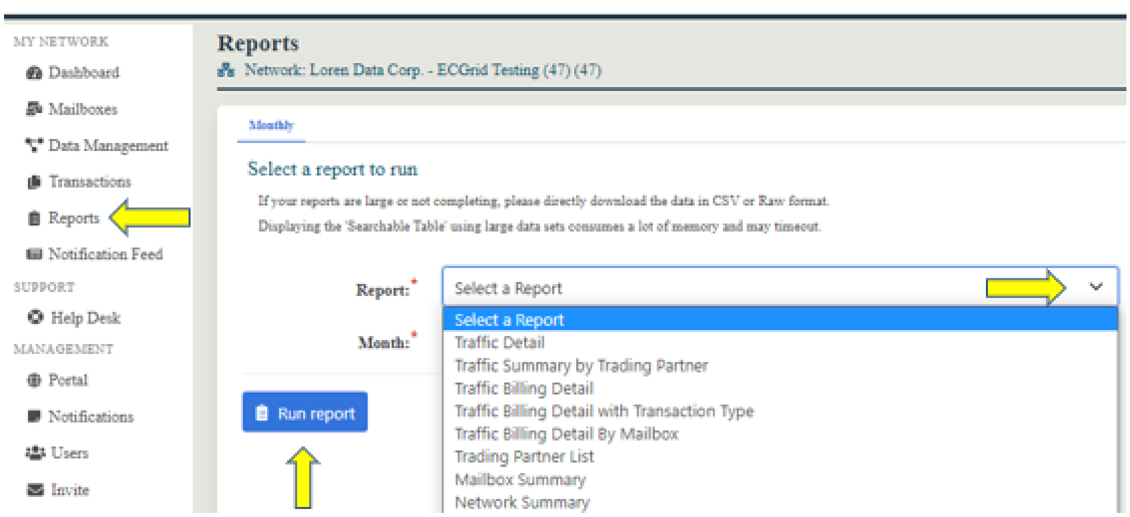
- Traffic Detail
- Traffic Summary by Trading Partner
- Traffic Billing Detail
- Traffic Billing Detail with Transaction Type
- Traffic Billing Detail by Mailbox
- Trading Partner List
- Mailbox Summary



Once you choose a report, you can now run the report on the page, download a .csv file, or download the raw data file report:



You can run the same reports at the network level by clicking on Reports from your left side navigation panel. From there, you will click on “Reports” from the upper navigation panel:



DATA MANAGEMENT

Can I standardize or override delimiters?

You can standardize delimiters <u>inbound</u> to a mailbox by clicking on Data Management on the left side navigation panel. Add the single character delimiter or the hex value for all 3 fields, then click "Save Changes":

Please note: This will change all delimiters inbound to the mailbox for all trading partners. You cannot change them for outbound data.

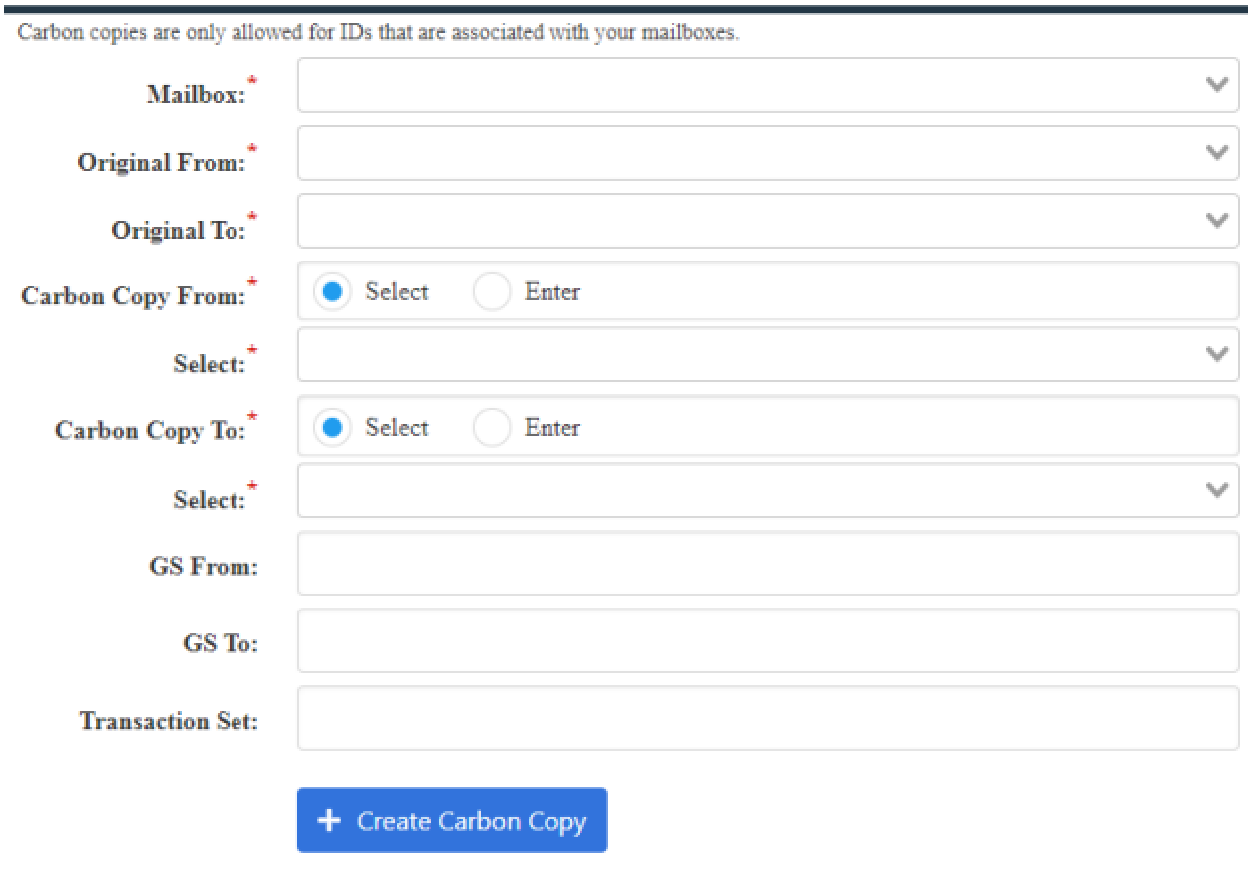
Common standard delimiters:

~ or 7E
* or 2A
> or 3E

Can I set up Carbon Copies?

You can set up carbon copies directly from your portal site! Click on Data Management from the left-side navigation panel, then choose Carbon Copy from the top. You can then click on "Create":

You will then pick from the drop-down menus to determine the original partnership that you will be copying. You can then set up the carbon copy IDs by either Selecting from the drop down or entering them manually:

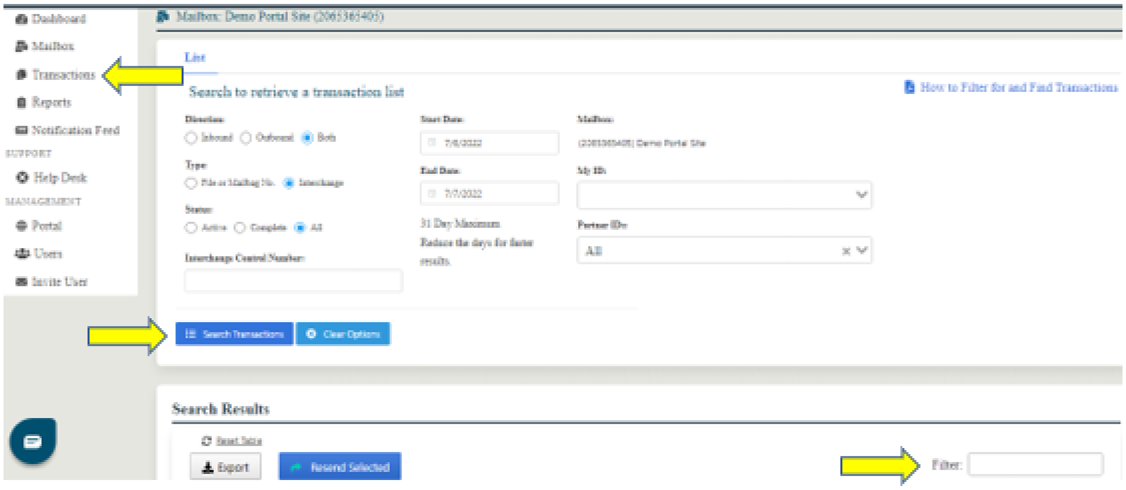


You can further filter the carbon copies by GS IDs and/or the Transaction Set.

TRANSACTIONS

How do I find the status of transactions or any errors on ECGrid?

The transaction menu item provides rich searching capabilities for locating files/interchanges. In addition to using the dashboard for transaction information you can also search by date range, EDI ID, document direction (inbound/outbound), type of transactions, and more. You can also filter your results even further, by using the "Filter" field under Search results:



All search returns and the metadata can be exported for analysis via CSV or XLS.

Full details on how to search for Transactions can be found here:

[How to Filter for and Find Transactions]

Additionally, the portal dashboard provides exception-based visibility right on the dashboard, in the "mailbox health" or the "network health" widgets depending on your user role. If there are any errors, the status information will be updated to identify any exceptions which may require your attention for resolution. We will identify these issues as errors in the health widgets.