

# Igor® Portal Project Setup Process

This document provides instructions for setting up a new Customer and Project in the Igor Portal, as well as creating new user accounts with access to the Project and associated Gateway(s).

**Important:**

- Portal Project Setup is required prior to licensing an Igor Gateway software installation if the associated Customer and/or Project do not already exist in the Igor Portal.
- The "Accounts" link is available only for users with the "Reseller Admin" role.

## Sign In

1. Sign in to the Igor Portal at <https://portal.igor-tech.com>

Igor

Email

Password

Remember me?

Sign in

by signing in, you hereby consent to the [Igor Terms and Conditions](#)

or sign in with one of these providers

Google Facebook

[Enterprise Sign In](#) [Privacy Policy](#) [Forgot your password?](#)

Fig. 1: Igor Portal Sign In

The Projects screen appears (Fig. 2 below).

## Access Accounts

- From the left MAIN menu of the Projects screen, click the **Accounts** link.  
**Important:** This link is available only for users with the "Reseller Admin" role.

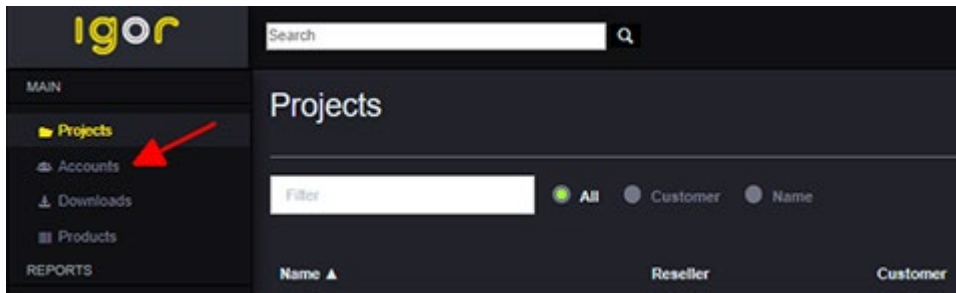


Fig. 2: Projects screen, Accounts link

- From the left MAIN menu, click the **Accounts** link.  
**Important:** This link is available only for users with the "Reseller Admin" role.  
The Accounts screen appears:

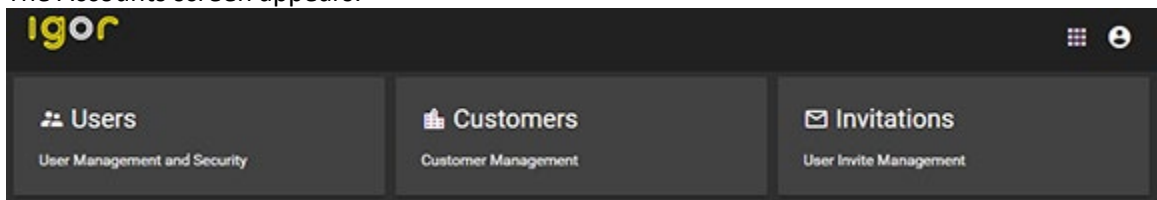


Fig. 3: Accounts screen

## Create Customers

From the Accounts screen, if they do not already exist, create Customers.

- Click Customers:

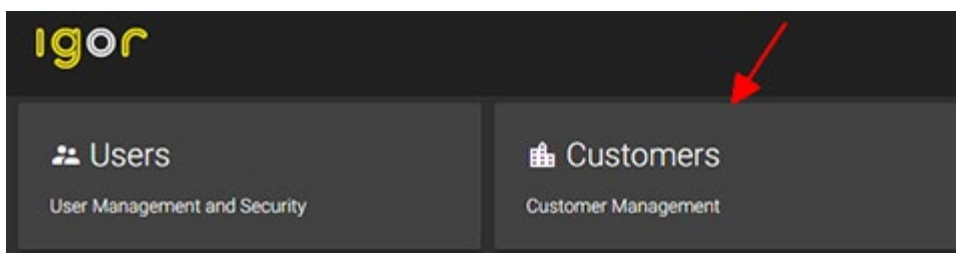


Fig. 4: Customers (customer Management)

- On the right of the Customers screen, click the **Create Customers** icon:

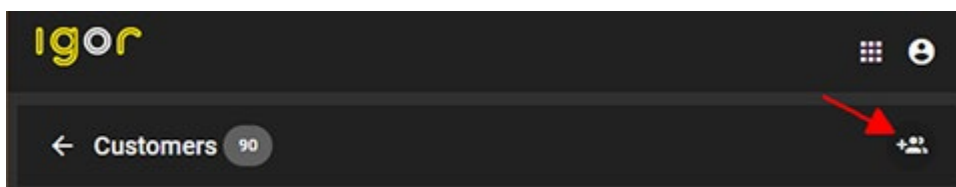


Fig. 5: Customers screen., Create Customers icon

The Create Customer dialog appears:

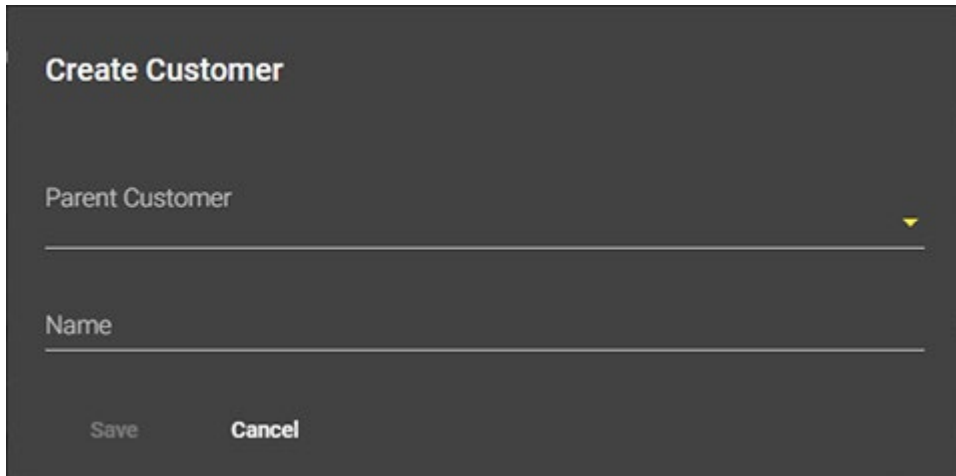
A dark-themed dialog box titled "Create Customer". It contains two input fields: "Parent Customer" with a dropdown arrow on the right, and "Name" with a standard text input line. At the bottom, there are two buttons: "Save" and "Cancel".

Fig. 6: Create Customer fields

6. If applicable, select **Parent Customer** from the drop-down list. Otherwise, leave the field blank:
7. Enter a Customer name, and click **Save**.  
The newly created customer will be added to the list.
8. On the left of the Customers screen (previously shown in Fig. 5), click the back arrow to return to the main Accounts screen.

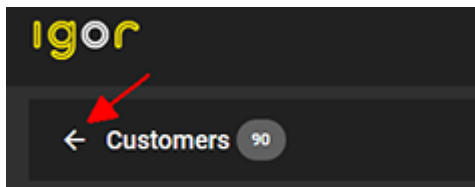


Fig. 7: Customers screen, return to Accounts screen arrow

## Create User Account for the Customer

(if one does not already exist)

9. From the main Accounts screen, click **Users**.

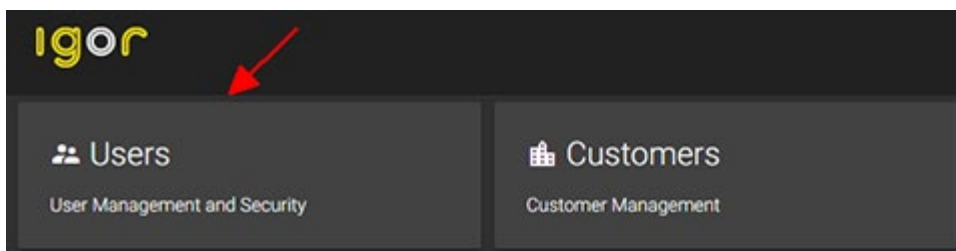


Fig. 8: Accounts screen, Users link

The Users dialog appears.



Fig. 9: Users - envelope icon

10. Click the envelope icon to begin the user invitation process.

**Note:** The invitation process allows you to enter a minimal amount of information about the user and will email them an invitation to fill-in additional fields, including setting their own password.

The Invite User dialog appears (Fig. 10 below).

A screenshot of the 'Invite User' dialog box. The title 'Invite User' is at the top left. Below the title are three input fields: 'Email' (a text field), 'Customer' (a drop-down menu), and 'Roles' (a drop-down menu). At the bottom of the dialog are two buttons: 'Save' and 'Cancel'.

Fig. 10: Invite User fields

11. Fill in the **Email field**, and make your selections from the **Customer** and **Roles** drop-down fields.
  - a. **Customer:** List of customers associated to the user setting up the account
  - b. **Roles:** Lists the roles available to associate to the new user account:
    - i. Reseller User: Can manage users, customers and projects
    - ii. Reseller Owner: Can create projects
    - iii. Building Owner: Can manage users and customers
    - iv. Building Tenant: Can view energy data
    - v. Report Viewer: Can view energy data

12. Click the **Save** button to send the invitation and return to the Accounts screen:

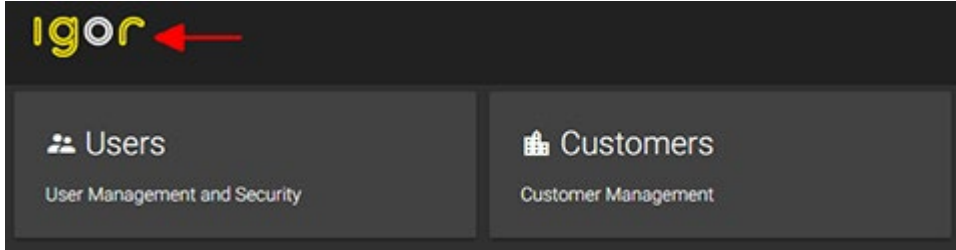


Fig. 11: Accounts screen

13. From the Accounts screen, click the Igor icon to return to the main Portal screen.

## Create a New Project

Each Gateway installation needs to be associated to a Project as part of the licensing process. *If an appropriate Project does not already exist in the Igor Cloud Portal for the Gateway installation, then you will need to create a new one.* Multiple Gateways can be assigned to the same Project; such as a campus of buildings.

14. From the MAIN menu on the left, select **Projects**; and then click the **+New Project** link on the right.

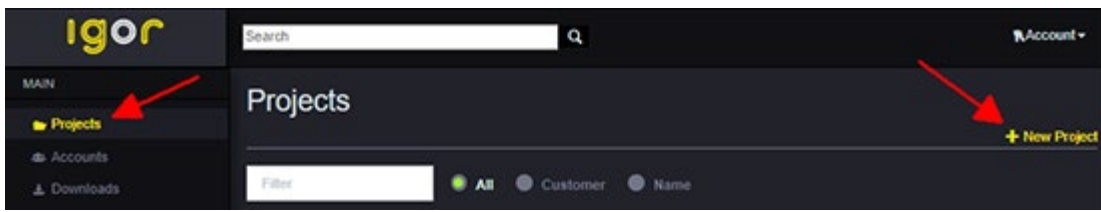


Fig. 12: Projects screen - New Project link

15. From the Create New Project screen, select the appropriate **Customer** for this project.  
**Note:** The drop-down list will be populated with the Customers associated to your user account from the Accounts screen as detailed previously.
16. Type in the **Project Name**.
17. Select the correct **Time Zone**.
18. Click the **Create Project** button.  
The new Project will appear in the Projects list and will be available when licensing the Gateway.

# Igor Gateway Software Licensing

After the Gateway software installation, the first time you access the Admin UI you will be prompted to license the software.

19. Open the browser, and navigate to one of the following URLs based on whether you are logged-in to the Gateway server or connecting from another device on the same network:
  - a. Local login on Gateway server: <http://localhost/admin/>
  - b. Remote device: <http://<Gateway IP Address>/admin/>

The License Required screen appears:

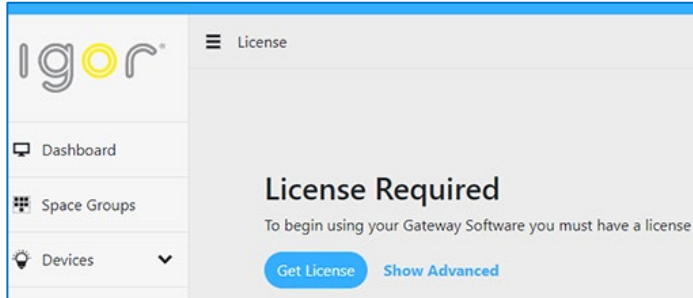


Fig. 13: Gateway License Required screen

20. Click the **Get License** button, and you will be prompted to sign in with your Igor Cloud Portal credentials. Enter your email, password, and click the **Sign in** button.

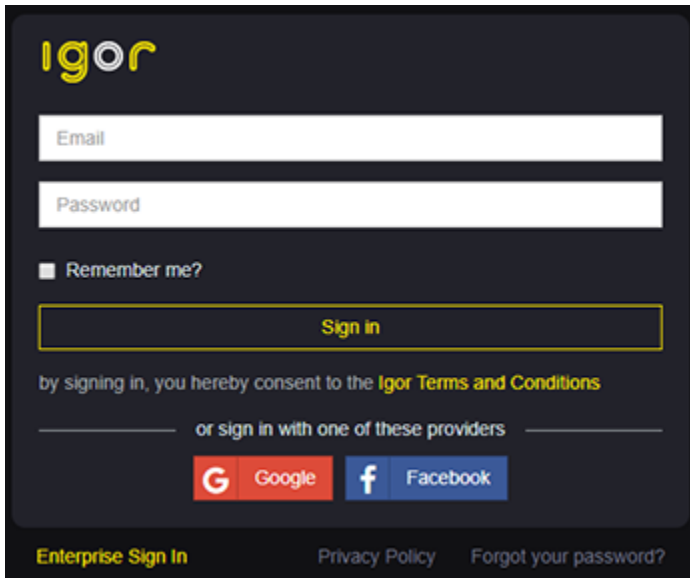


Fig. 14: Igor Cloud Portal Sign In

The "License New Gateway" screen appears:

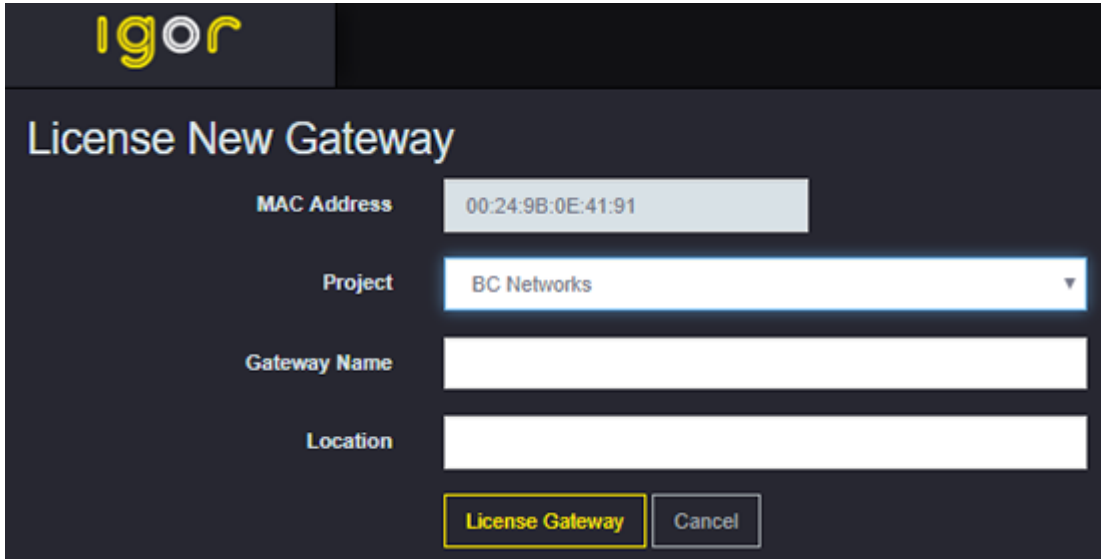


Fig. 15: License New Gateway screen

21. From the **Project** drop-down, select the Project to which the Gateway is to be associated.
22. Enter a descriptive **Gateway Name** and **Location**.
23. Click the **License Gateway** button.  
The Igor Portal will generate a temporary (30-day) license\*; and the Gateway will automatically download it.

## \*Full License Generation

The process described in this document generates a *temporary 30-day license*. For the full license to be generated, please contact Igor Support Services and *provide the Project and Gateway names*:

**Email:** [support@igor-tech.com](mailto:support@igor-tech.com)

**Phone:** 515-661-4412 | 1-877-588-2650

Our support line is staffed from 7:00 A.M. to 5:00 P.M. Central time.

END.