M-THEORY

Standard Operating Procedure:

Client Ticket Portal Setup

Standard Operating Procedure: Client Portal Reporting and Usage

Created Sept 5, 2023

To fulfill its reporting obligations to its customers, M Theory has set up a Client Portal.   M-Theory customizes the portal for each individual client, meaning the link for each individual client will differ, and each client will see the logo for their own company. Email instructions are sent when each client is configured for the portal.

PORTAL USAGE

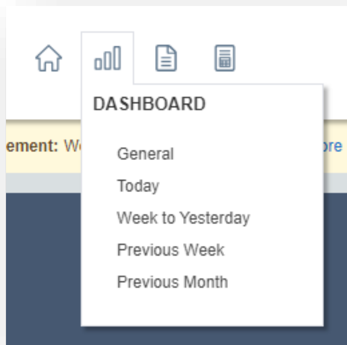
1. These items are included in the Client Portal:

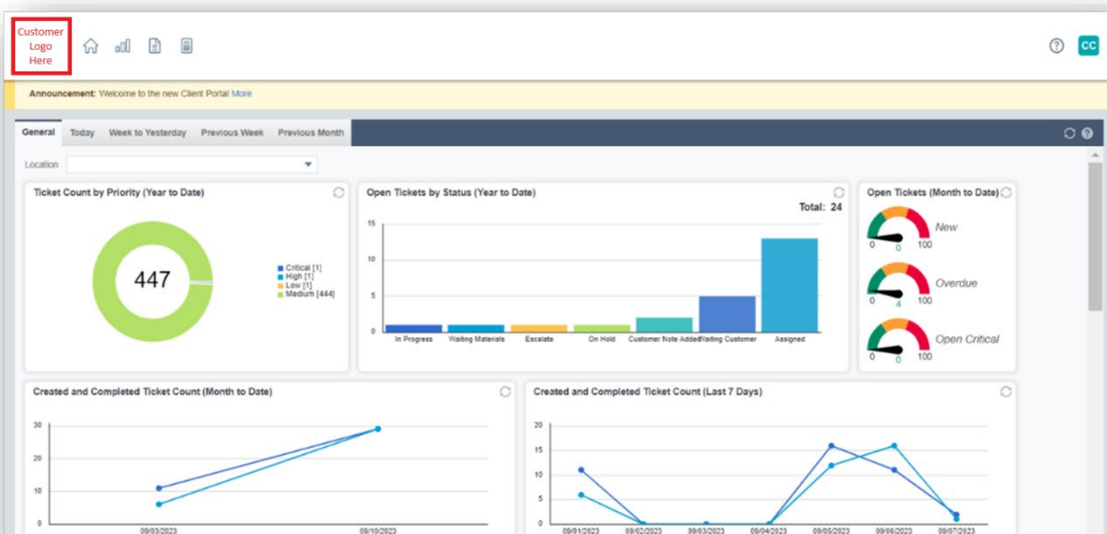
    a. *Important Note:* The Client Portal reporting feature includes a series of standardized, "out of the box" widgets. These "out of the box" widgets are not to be modified. If the customer would like to have additional widgets, or any "ad hoc" style reporting, an additional fee will be involved.

    b. *Important Note, #2:* Access to the client portal is read-only. The customer may review data, but cannot make changes. ***Only M-Theory personnel*** *may make changes to tickets or to the portal itself.* If the customer has questions or concerns regarding the data or features displayed on the portal, they should contact the Help Desk or other appropriate M-Theory personnel (such as a project manager) for assistance.

Standard Features

"Dashboard" Icon
(The Default page. This is the page the customer sees when first logging in.)



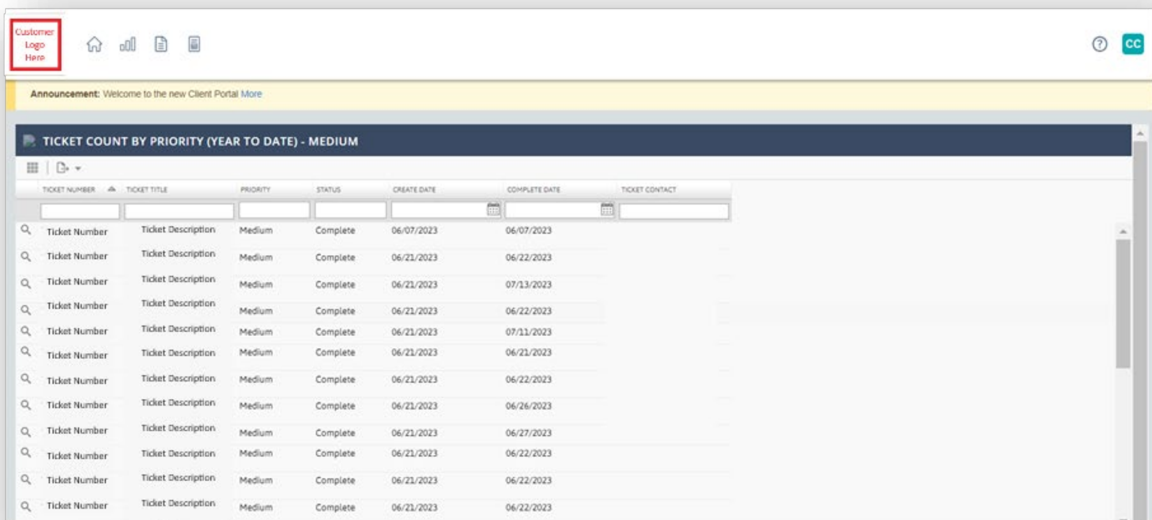


(Each tab contains widgets displaying a specific period of time:)

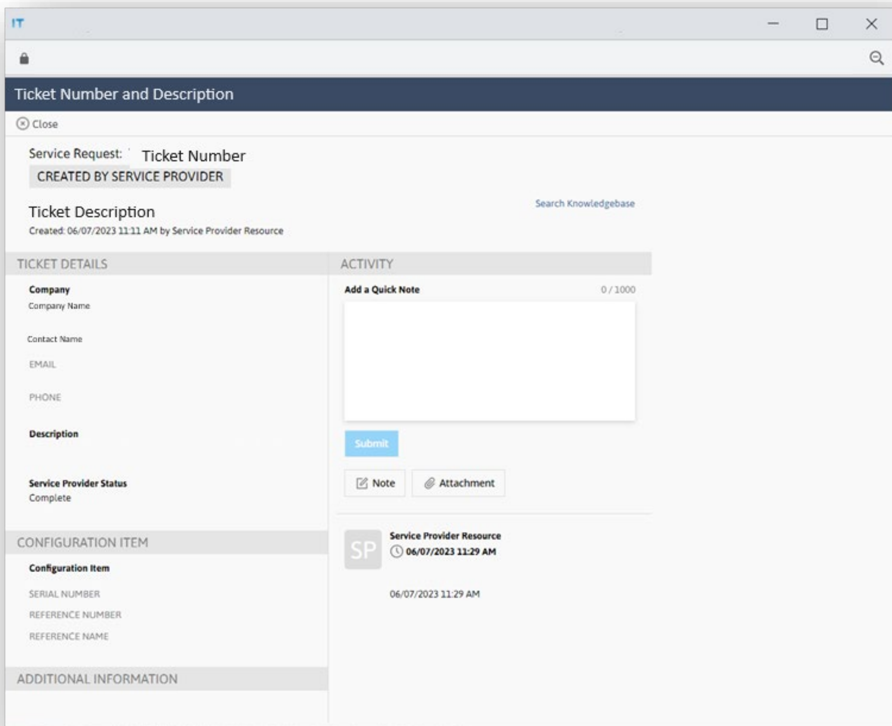
- General
- Today
- Week to Yesterday
- Previous Week
- Previous Month

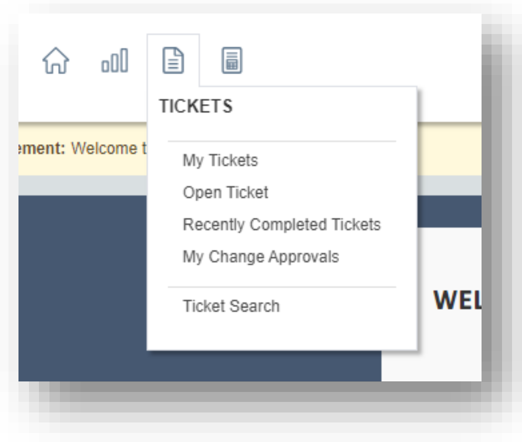
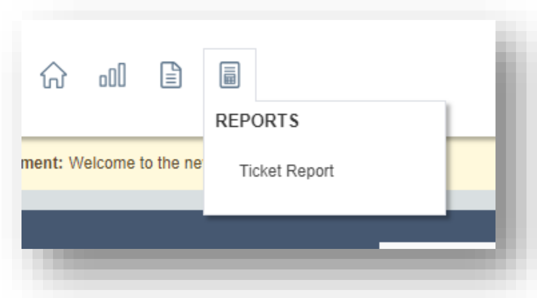
Standard Operating Procedure:

Client Ticket Portal Setup

For each of the reporting tabs: • Each widget can be clicked to display the list of tickets that drives that widget. This list can then be exported into .CSV, Excel, or PDF format. • Each ticket from the list can be individually reviewed. However, tickets displayed in this fashion cannot be modified. If a customer has a concern about any individual ticket, they should contact the Help Desk for further assistance.
Clicking a widget brings a list of the tickets that drive the widget:

The customer can then view any individual ticket from this list.

Standard Operating Procedure:
Client Ticket Portal Setup



<u>"Tickets" Icon</u> The Tickets icon will allow the customer to look up individual tickets (if they have been given a ticket number.) • A customer cannot create a new ticket from the "tickets" button. If a new ticket is to be created, they will need to contact the Help Desk. • Some features displayed here, such as "My change controls" are not implemented at this time. (They cannot actually be removed from the menu, so the customer will be able to see them, but they will return no results if clicked.)	
<u>"Reports" Icon</u> The Ticket Report icon will allow the customer to run some report queries on their own. Report queries will return a simple list of tickets. Reminder: any reporting requirements beyond the standard widgets and "Ticket Report" icon will require a fee.	

<u>"Home" Icon</u>

- This icon will bring the user to a standard system page with an example dashboard. This example dashboard would allow a new user to click on things and familiarize themselves with various widget elements. However, *<u>this introductory system dashboard does not contain the actual customer reporting</u>*. Reporting is contained *<u>only</u>* on the "Dashboard" page.