



# Primary Contacts User Guide

## Team Metalogic Partner Portal

### **SUMMARY**

*This guide is an overview for first-time users of the Team Metalogic Partner Portal. The guide covers how to access the portal, as well as some of the core features available to Primary Contact users.*

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# Team Metalogic Primary Contacts User Guide

This guide walks you through each of the following items. You should go through all topics to get the best start with the portal.

While this guide does not cover every subject in depth, you should feel comfortable working in it after you complete each step. Remember to reach out at any point if you need assistance.

## Getting Started Checklist

- Logging In
- Setting a Support PIN
- Basic Navigation of the Portal
- Creating and Publishing Content

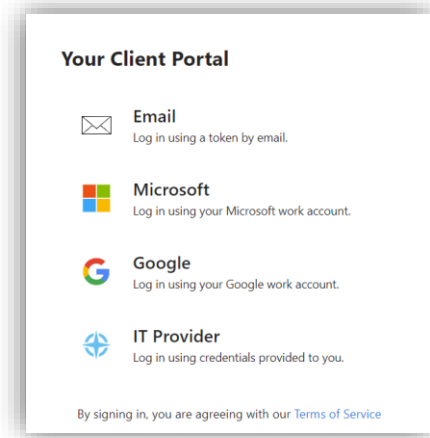
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## Logging In

When your portal is ready, you'll use your email and password to log in. The portal will keep you logged in, so there's no need to re-enter credentials every time.

Alternatively, just open Microsoft Teams and click the icon for 'TML Portal' on the left-hand navigation. You don't need to login if you're already logged into Teams.



### For Office 365:

1. Choose the Microsoft option.
2. Use the Microsoft dialogs presented to sign in.

### For Google:

1. Choose the Google option.
2. Use your Google account dialog to log in.

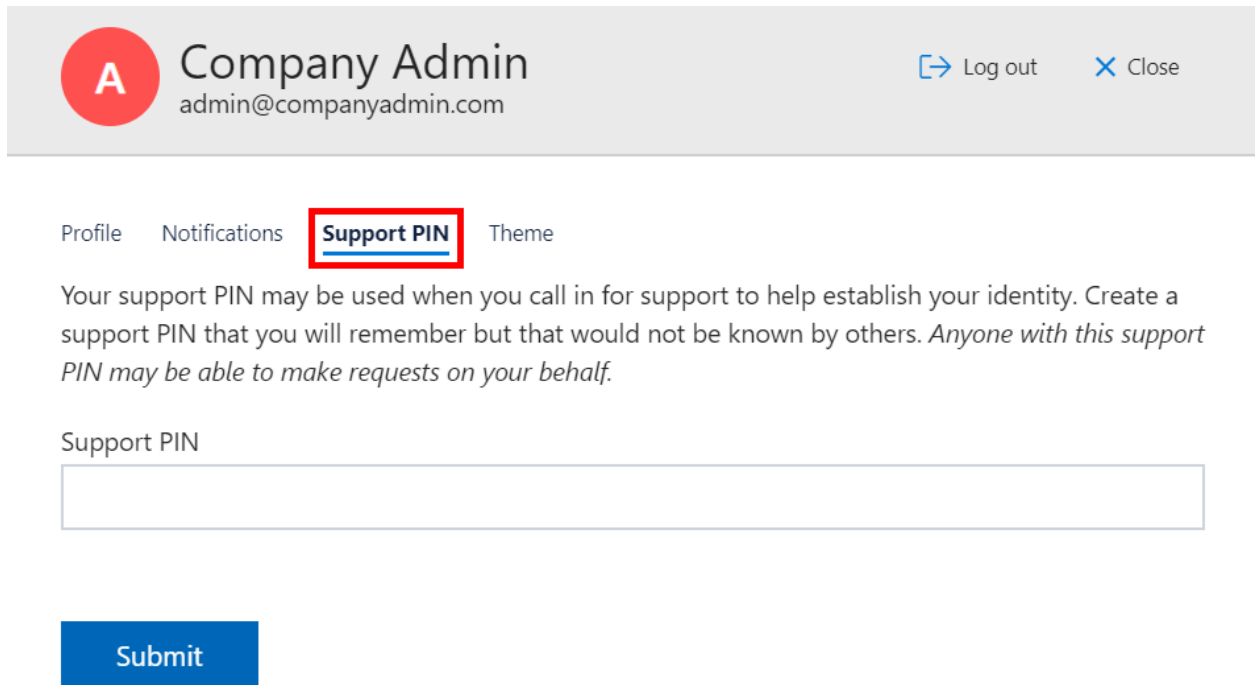
### For email token:

1. Choose the "Email" option, enter your email address and press the "Get Log In Token".
2. Check your email and either enter the token sent or press the button in the email to log in directly.

## Setting a Support PIN

Support PINs help keep your company secure by adding another layer of protection. With it, it's significantly harder for someone to impersonate you and make false (and potentially harmful) requests on your behalf. Every user in the TML portal is required to have one.

1. Select your username / profile picture at the top right to display your profile settings.
2. Select the "Support PIN" section. **On first-time login, a window will pop up prompting you to enter one.**



The screenshot shows a user profile header for 'Company Admin' with the email 'admin@companyadmin.com'. The 'Support PIN' menu item is highlighted with a red box. Below the header, there are navigation links for 'Profile', 'Notifications', 'Support PIN', and 'Theme'. The 'Support PIN' section contains a text box for entering the PIN and a blue 'Submit' button.

Company Admin  
admin@companyadmin.com

Log out Close

Profile Notifications **Support PIN** Theme

Your support PIN may be used when you call in for support to help establish your identity. Create a support PIN that you will remember but that would not be known by others. *Anyone with this support PIN may be able to make requests on your behalf.*

Support PIN

Submit

3. Select "Submit".

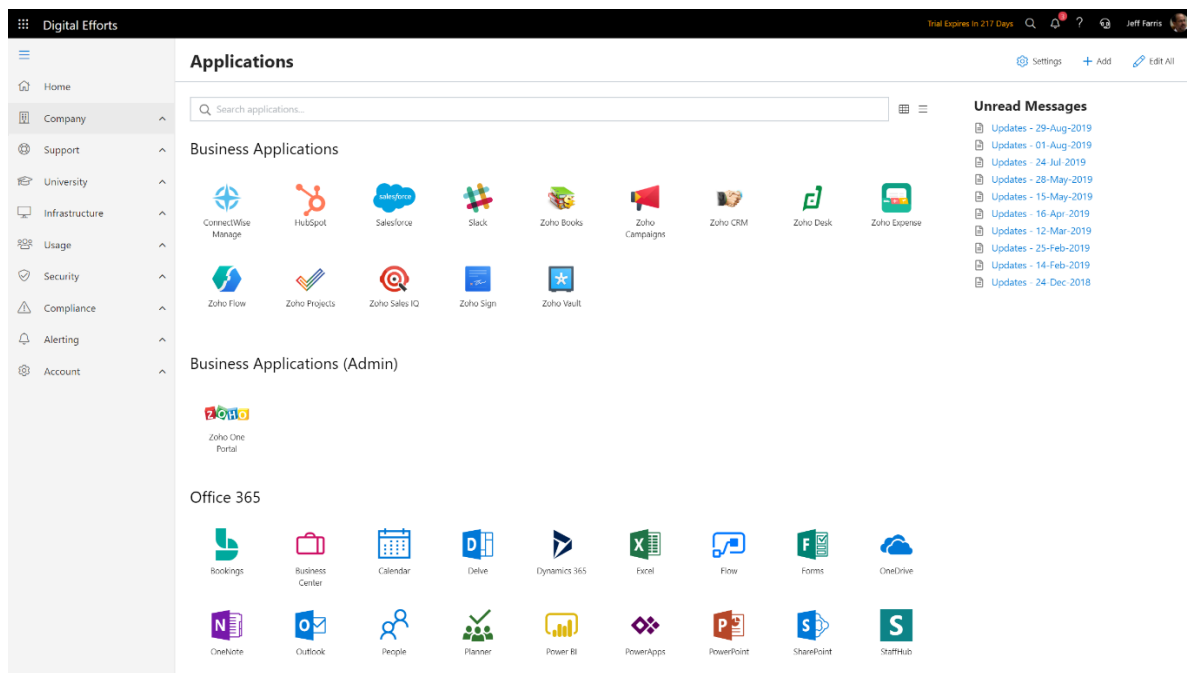
# Basic Navigation of the Portal

As a primary contact / company administrator, you may have access to many areas that a typical end user will not see. End users will only see the **Home**, **Company**, **Support** and **University** tabs on the left, depending on your specific view.

Your log in designates you as a company administrator, so you can see options past those as well.

The TML portal organises the page as follows:

- Menu areas are organized in drop-down menus on the left.
- Primary information is presented in the middle of the screen.
- Pop-up windows are shown on the right side of the screen to present additional data or to gather input.
- The top title bar displays your company name and provides links to other features.
- Action buttons are typically shown on the top right side of the page in the information title area, or at the bottom of forms in the pop-up windows.
- Some information areas also have additional tabs which appear below the information area.



Clicking on your username or profile picture displays your profile settings. From here, you can log out or change various personal settings.

Wherever possible, action buttons follow a consistent naming of activities:

- **Settings** – Change the settings related to the information area.
- **Edit All / Finish Edit** – Show all content in the information area, even if it might be hidden because of group memberships (more on groups later).
- **Download** – Download information in an Excel format.
- **Sync** – Scan the online data source for new information and download.
- **Add / Edit** – Add or update an item.
- **Red Trash Icon** – Delete an item.
- **Close** – Close a window (without saving).

Certain information areas are presented as grids with paging controls presented at the bottom and any filterable columns have funnels in the column title.

## Home

The home page is where you will start whenever you first log into the portal. Because we can customise views, we can have one of four views loaded up for you:

- **The Support Home Page:** Gives you quick access to submit and view IT tickets
- **The Applications Home Page:** Gives you an intranet of links that you can customize.
- **The Knowledge Base Home Page:** Displays a library of customisable helpful articles.
- **The University Home Page:** Brings you to training courses that can be taken and customised.

Regardless of the home page, you'll have access to the rest of the dropdowns. The following is an overview of what they do.

## Company

**Applications** – Get a library of helpful links in one spot that are relevant to your business.

- **Tip:** Pin certain application to your favourites with a right click. You can also click on the grid at the top left of the screen from anywhere on the portal to access your favourites.

**Calendar** – See your calendar and give other users access to other user's calendars in the portal.

**Directory** – View contact information of the company, synced through Office 365.

**Knowledge Base** – Document essential business processes and solutions to common issues.

- **Tip:** You can add to the knowledge base by clicking "Add" in the top right corner of the screen. You can also select these articles to only show to certain user groups.

**Messages** – Post department or company-wide announcements from the Messages area.

- *Tip: Fire alarm test next week? Car Park being repaved? Company picnic next week? Post it in the Company Message portal – it'll show up as an announcement notification for all your users. Look for the bell icon in the top right.*

## Support

**Office 365 Status** – Get a quick glance at Office 365 to see if there are global problems.

**Report a Problem** – Submit an IT ticket to the right area using the options provided.

**Request Service** – Request services including new user onboardings, PC upgrades, and more.

**Support Tickets** – View the status of open, closed and in progress tickets waiting on a response.

- *Tip: Typically, company admins can see all the tickets submitted from their organisation. Add new files and update our Service Desk engineers directly from the message option within tickets.*

## University

**Courses** – Train users in a learning centre for your organisation populated with helpful courses.

**Office 365 Updates** – Quickly see new updates for cloud-updated Office 365 applications.

**Quick Starts** – Find quick reference guides for tools and processes.

- *Tip: Add your own reference guides for your business line applications here to help new employees hit the ground running.*

## Infrastructure

**Domains** – See the status and expiration date of company-owned Internet domains.

**Endpoints** – Gain security and usage insights into the computers controlled by your company.

- *Tip: Experiment with the tabs at the top to see different kinds of information on security and performance. Click on individual machines to see installed software and more.*

**Network** – See information about devices and networks within your company.

**Servers** – Gain security and usage insights into the servers controlled by your company.

**Software** – See a software inventory of all programs installed on machines, and who's got them.

## Usage

**Adoption** – Get insights into Office 365 adoption across email, Teams, Yammer, and SharePoint.

**Data** – Get specific data on individual data usage on a per-user basis.

**Licenses** – Monitor license utilisation for products from Office 365 and other vendors.

- **Tip:** You can also use the "Add" button to track usage of line of business application licenses and keep track of their renewal date.

**Users** – See users loaded in the portal and their contact info, admin status, MFA info, and more.

## Security

**365 Backup** – See Office 365 backup info in a dashboard format, with more tabs up top.

**Backups** – See the latest information on the backups on your company data.

**Data Breaches** – Track whether an email has been exposed in a prior data breach.

**Email** – View your company's email account activity as a whole.

**Log Ins** – View the MFA status of your organisation, as well as additional user data.

## Compliance

**Assessments** – See assessments and their reports to see what you are being graded on.

**Policies** – Monitor the level of compliance with each policy and see your risk score at any time.

**Reports** – View reports from various tools from directly in the portal.

**Training** – See the status of enrollees and completions for university courses.

## Alerting

**Jobs** – Check the status of active synchronisation jobs.

**Log** – History of previously completed jobs.

## Account

**Agreements** – View your various agreements with us, as well as their basic details.

**Dashboards** – View IT data in consolidated, visual gauges.



**Feedback** – View ticket feedback information from users across the company.

**Invoices** – View your invoice billing history from us.

**Planner** – View and manage IT projects and activities organized by yearly quarter.

- **Tip:** *We use the planner section as a technology roadmap for your organisation so that you can get transparency on what we recommend, and why. Click on the cards to learn more about the individual solutions.*

**Quotes** – View active quotes to your company from us.

**Settings** – Manage message center daily wrap-up email delivery and Office 365 integrations.

## Creating and Publishing Content

In the Team Metalogic Partner Portal, content defines the building blocks of information, including:

- Menu items
- Knowledge base articles
- Problem reports
- Service requests
- Courses
- Quick Starts
- Policies

As a Primary Contact user, you can opt-in to create content unique to your company in addition to the content we have published to your organisation to help get you started.

After you have familiarised yourself with the portal, experiment with creating and publishing custom content with the "Add" buttons throughout the sections.

If you're unsure of your changes, ask your account manager to help you through getting set up.