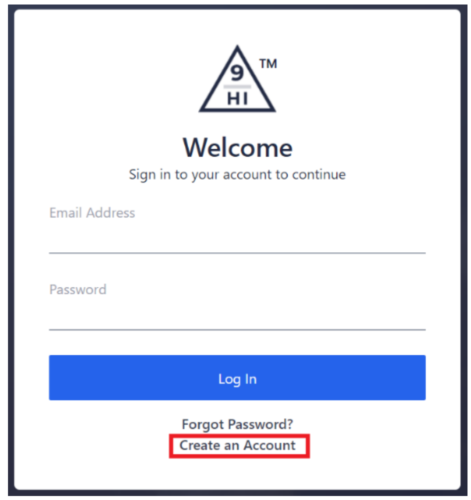
Step by Step Instructions for Creating and Developing Innovation Exploration Projects

Please carefully read these instructions and consult our Help & Knowledge Center frequently throughout this competition. If you still have questions and/or encounter any issues/bugs, please submit a help form located here.

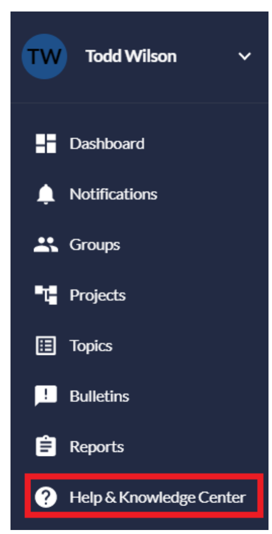
Step 1: Create an Account

1. Navigate to the 9-HI™ Login Page
2. Click “Create an Account” (see below)
3. Enter in your email address and a password that meets 9-HI™ requirements
    a. Be sure to use an email address that you can easily access and check regularly as you’ll receive important 9-HI™ notifications to this address
4. Read and agree to the Privacy Policy & Terms and Conditions
    a. If you do not agree to one or both agreements, then you cannot join 9-HI™
5. Click “Sign Up” at the bottom of the page
6. Verify your email address then refresh your browser
    a. You will automatically be redirected to the “My Profile” screen



Step 2: Setup Initial Profile

1. Click “Edit My Profile”
    a. You will automatically be redirected to the “Edit My Profile” screen
2. In order to access the full capabilities of 9-HI™, you must complete all required fields denoted with an asterisk (*)
    a. If you’re currently unemployed, enter your Title as “Student” and Current Employer as “SUNY Binghamton”
    b. If you would like to learn more about 9-HI™ first, click the “Help & Knowledge Center” button at the bottom of the left hand navigation menu (see below) then view the “New Member Introduction” section before returning to complete your profile
        i. We strongly encourage you to frequently visit and leverage the Help & Knowledge Center throughout this competition
    c. We strongly encourage you to complete as many fields of your profile as possible as this will make you more likely to appear in Subject Matter Expert (SME) searches and make you more desirable to those building out 9-HI™ Groups, Projects, and Topics



i. At a bare minimum, we recommend completing the top 4 sections of your profile (Required Information, General Information, Availability, and Profile Keywords)
ii. Please note that you can go back to your profile at any time to make updates

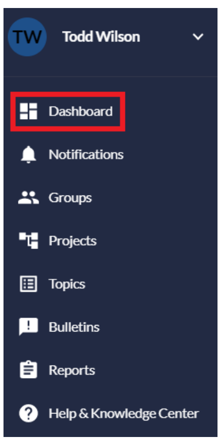
3. Click “Save Profile” in the top right corner to save any changes you don’t want to lose

<u>Step 3: Prepare for Innovation Exploration (IE) Projects</u>

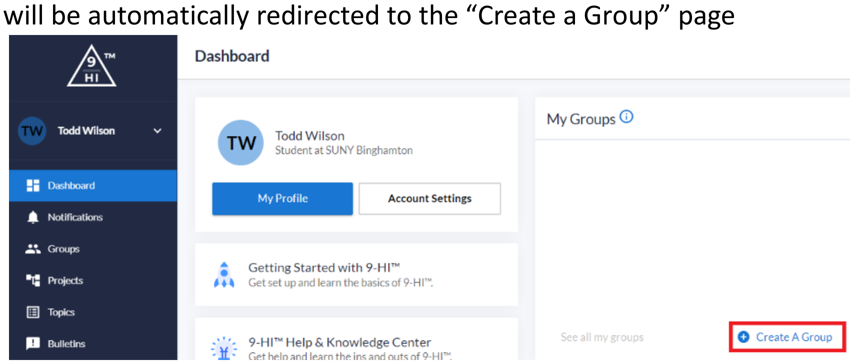
1. Visit the Help & Knowledge Center and review the 9-HI™ Quick Start article [For SMEs Interested in Advancing New Technologies with Innovation Exploration Projects]
2. Determine who will be on your team (maximum of four (4) students per team)
   a. You *<u>really</u>* need people on your team with both engineering and business management capabilities. Consider the three Tier 1 Lanes: Product Technology, Team & Stakeholders, and Market Application. A successful team will have people that can work in all three of these categories and their underlying 9 FPM categories. We provide instructions for inviting Group members below.
   b. In addition to sourcing internally within the 9-HI™ user base, you can also network with people outside of 9-HI™ by inviting them right into your IE Group, Project, and Topic(s) via the 9-HI™ Platform. All you need is their first name, last name, and e-mail address to send them an invitation to join 9-HI™.

<u>Step 4: Create an IE Group</u>

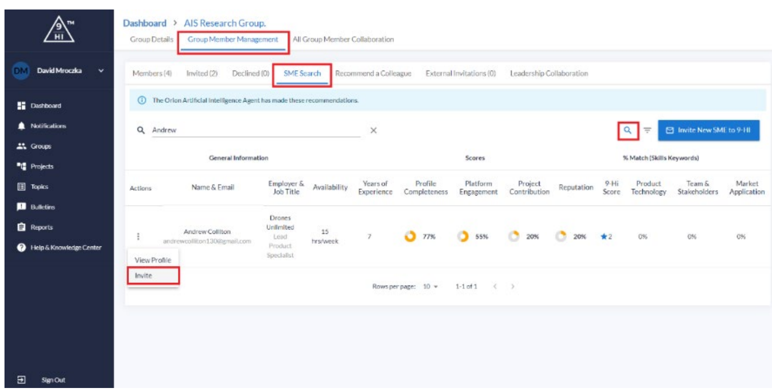
1. Use the left hand navigation menu and click on “Dashboard” (see below)



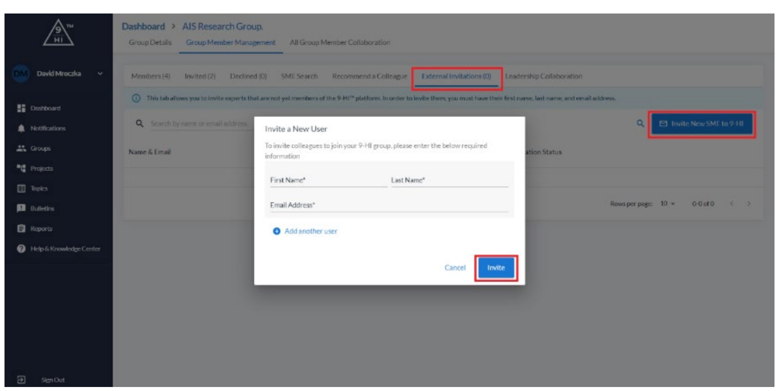
2. Once on your Dashboard, find the “My Groups” card and click on the option to “Create a Group” (see below)
   a. You will be automatically redirected to the “Create a Group” page



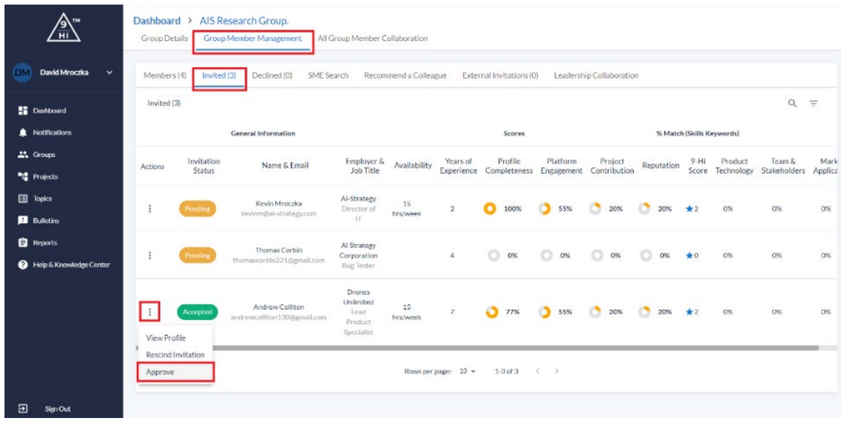
3. On the next screen, select the “Innovation Exploration” option, then fill in all required fields denoted with an asterisk (*)
    a. The Group’s Description can be just a draft statement for now until you assemble your team and then you can all agree on the content. If you are organizing this Group for the Binghamton University 2023 Spring Competition, then you can enter that in the Description section.
    b. For the Tier 1 Lanes of Focus, most groups should select all three Tier 1 categories
    c. In the Keywords section, you’ll include capabilities of the Group as a whole
        i. Be sure not to mix up Product Technology and Market Application Keywords, sometimes it’s easy to confuse them
        ii. Please note that Group Keywords are typically the most general in nature and that you’ll enter in more specific Keywords about your Project(s) and Topic(s) later on
    d. The final required field is the Point of Contact, which is most likely the creator/leader of the Group
4. Click the “Save” button in the top right corner
5. Now is a good time to invite your Group team members. To start inviting members, click on the “Group Member Management” tab at the top of the screen (see below).
    a. If they’ve already created a 9-HI™ profile, click on the “SME Search” tab then click the magnifying glass icon to initiate a search by name or email address. Once you find the user(s) you want to invite, click the actions menu and select “Invite”.



    b. If they have not yet already created a 9-HI™ profile, click on the “External Invitations” tab then click the “Invite New SME to 9-HI” button. Provide the required information for the user(s) you want to add then select “Invite”.

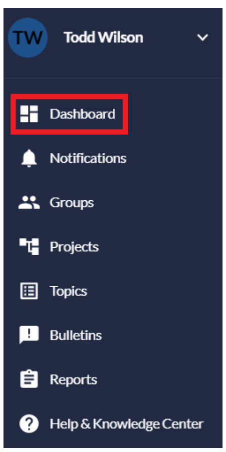


6. After being invited, the invitee will receive alerts via their email address and their Notifications on the left hand navigation menu. The invitee can accept or decline their invitation via their Notifications. **<u>Even after the invitee accepts the invitation, you still need to go back into the “Group Member Management” tab and take another action to approve them as a Group member.</u>** To approve a member, find their name in the “Invited” tab and click the actions menu next to their name, then click “Approve”.

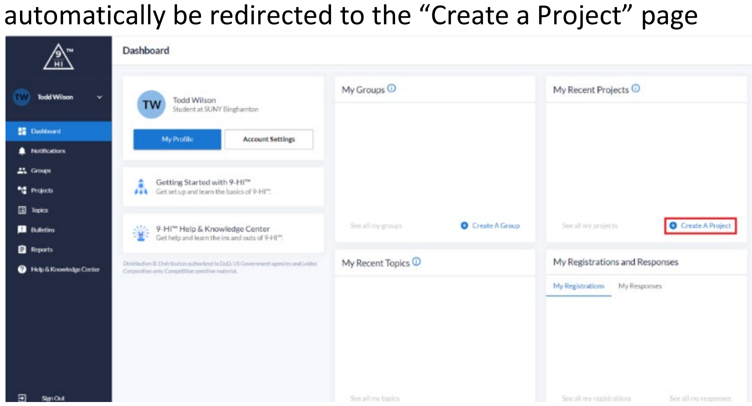


<u>Step 5: Create an IE Project</u>

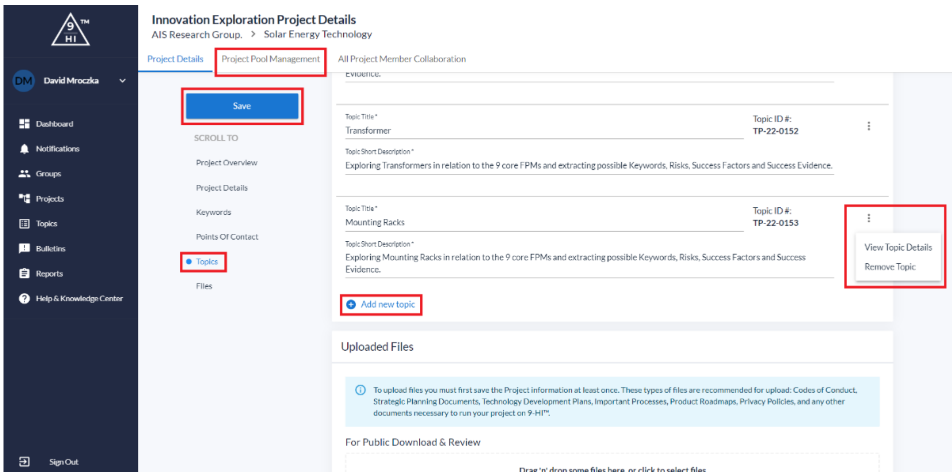
1. Use the left hand navigation menu and click on “Dashboard” (see below)



2. Once on your Dashboard, find the “My Projects” card and click on the option to “Create a Project” (see below)
   a. You will automatically be redirected to the “Create a Project” page



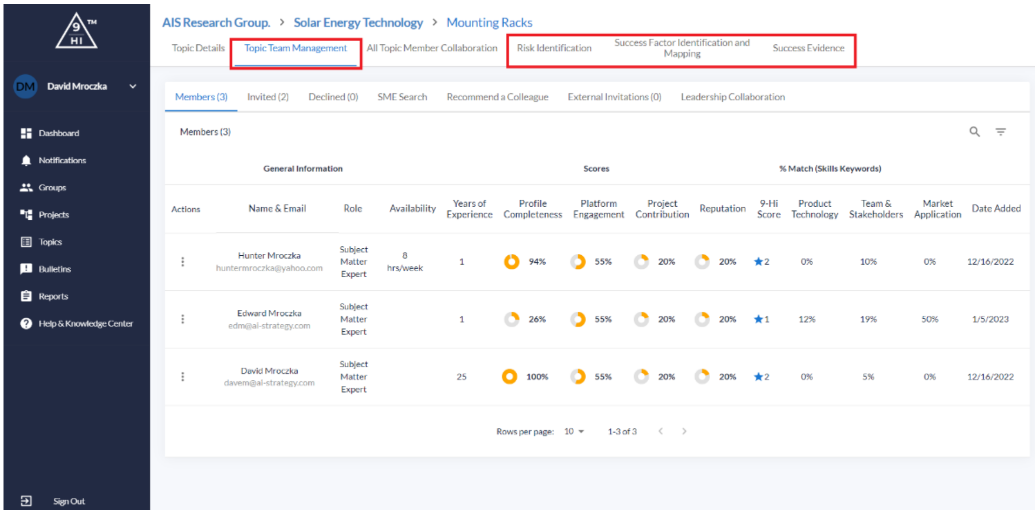
3. On the next screen, select the “Innovation Exploration Project” option, then fill in all required fields denoted with an asterisk (*)
4. Complete the “Project Details” Card at the top of the screen before trying to fill in other fields.
    a. The Project Description, Objectives, Technology Readiness Level (TRL) for the Project and Topics are very important and wording should be chosen carefully as other Industry SMEs and AI Agents will be relying on them when reviewing the project and Topics
5. After completing all required fields, you will enable the “Topics” section (see below) of this page where you can add new Topics to your Project. These Topics are where the essential data from your research will be entered. You may create as many Topics as necessary here and enter files related to the overall Project.



6. In the “Topics” card, complete all required fields denoted with an asterisk (*)
    a. Complete the “Topic Title” and “Topic Short Description” fields first, you will add in more details about your Topic(s) later on
    b. You can use the actions menu (3 vertical dots) to “View Topic Details” or “Remove Topic” (see above)
7. Click the “Save” button in the top left corner (see above)
8. You are now ready to invite Project Pool members to your IE Project, which follows the same process as inviting Group members, but you’ll be working in the “Project Pool Management” tab instead (see above)

Step 6: Begin researching & entering information for your chosen Topic(s) on the Topic Details Page(s)

1. As mentioned above, you can enter in more details about your Topic(s) by using the actions menu (3 vertical dots) and selecting “View Topic Details”
    a. You will automatically be redirected to the Topic Details Page
2. On the next screen, complete all required fields denoted with an asterisk (*)
    a. Be sure to include very specific Keywords for each Topic
3. You are now ready to invite Topic Team members to your IE Topic, which follows the same process as inviting Group and Project Pool members, but you’ll be working in the “Topic Team Management” tab instead (see below)



4. Complete the “Risk Identification” tab (see above)
    a. Refer to the [Mapping Risks and Success Factors]() article for more detailed instructions
5. Complete the “Success Factor Identification and Mapping” tab (see above)
    a. Refer to the [Mapping Risks and Success Factors]() article for more detailed instructions
6. Complete the “Success Evidence” tab (see above)
    a. Refer to the help informational bubbles at top of the Success Evidence page for more detailed instructions