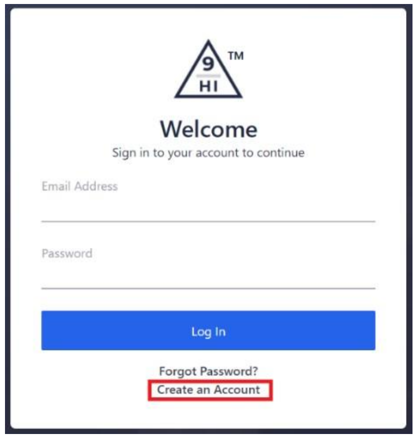
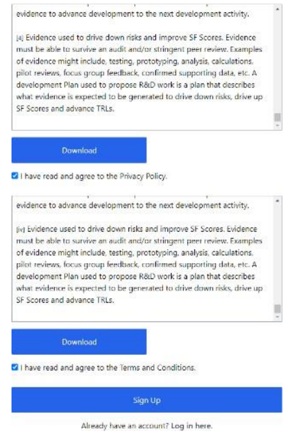
Step by Step Instructions for New Users

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

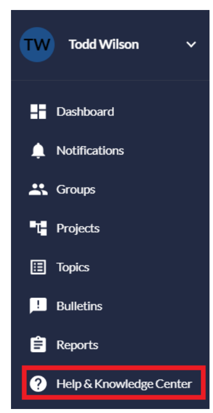
Step 1: Create an Account





1. Navigate to the 9-HI™ Login Page.
2. Click “Create an Account”.
3. Enter in your email address and a password that meets 9-HI™ requirements.
4. Read and agree to the Privacy Policy & Terms and Conditions.
5. Click “Sign Up” at the bottom of the page.
6. Set up 2-Factor Authentication
    a. Use Google Authenticator App or similar by downloading the App to your cell phone/mobile device. Click here for step-by-step Authenticator download and usage.
7. Complete individual payment info or use Group Code for annual subscription.
8. Verify your email address then refresh your browser.
    a. You will automatically be redirected to the “My Profile” screen.

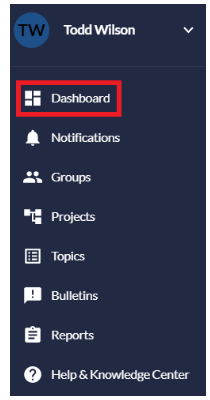
Step 2: Setup your Personal Profile



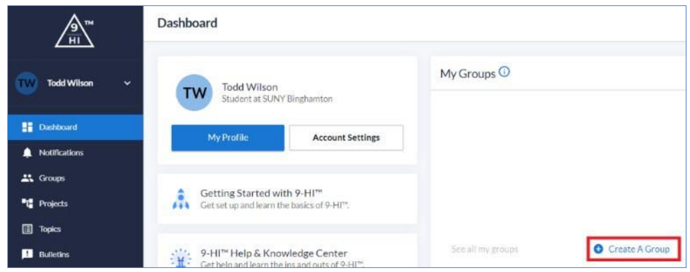
1. Click “Edit My Profile”.
    a. You will automatically be redirected to the “Edit My Profile” screen.
2. To access the full capabilities of 9-HI™, (enable the left-hand menu) you must complete all required fields denoted with an asterisk (*).
    a. We strongly encourage you to complete as many fields 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.
3. Click “Save Profile” in the top right corner to save any changes you don’t want to lose.
4. Return to your Dashboard and click on “Settings”, here you can adjust your Profile Privacy Settings to control what information may be seen by other users.

Step 3: Create a Group (for Program Managers if one is not set up for you already)

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.](#)
   Before you can create an IE project, you need to establish a group that will “own” the IE Project.

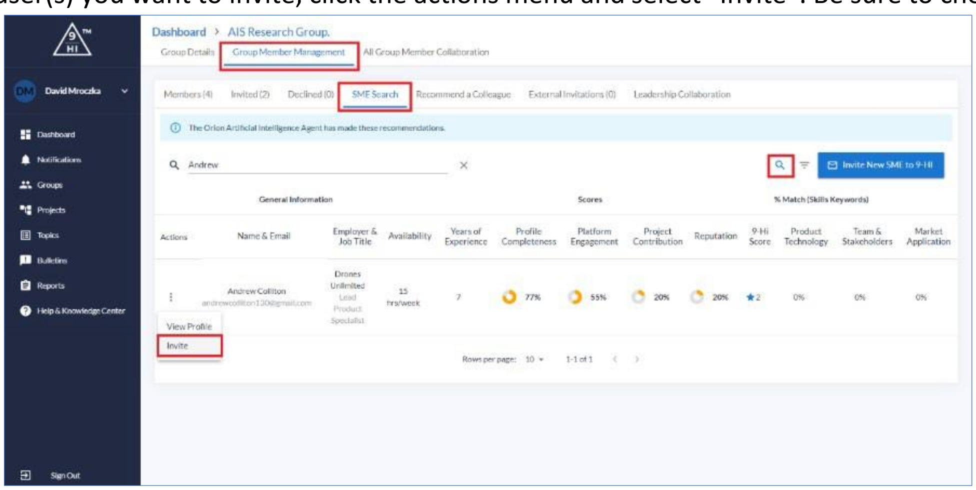


   a. First decide if you will create a Group that represents an existing organization like a company, university, or government organization; Or if you want to create a public IE group that is dedicated to just building and managing IE projects.
   b. Use the left-hand navigation menu and click on “Dashboard”.
   c. On your Dashboard, find the “My Groups” card, click “Create a Group”.



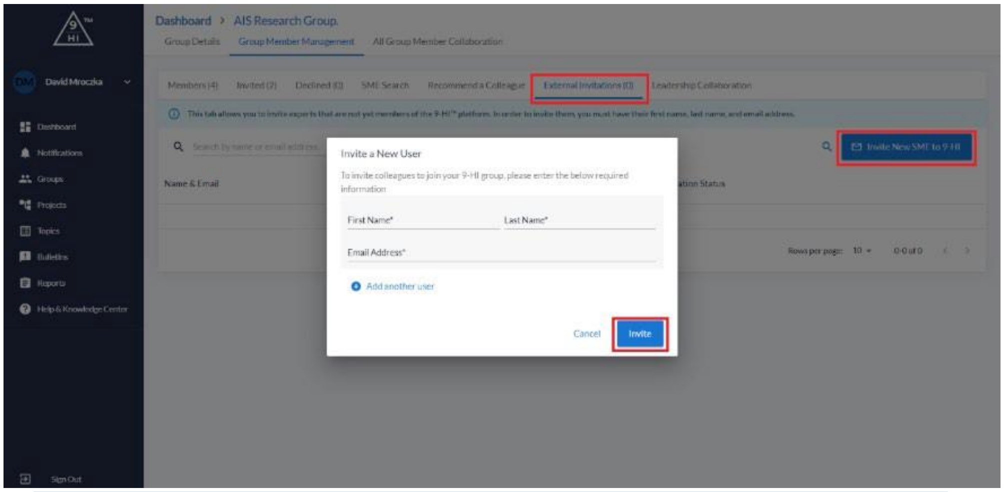
   d. On the next screen, select the Group Type.
   e. On the following Screen you will fill required fields with an asterisk (*).
   f. In the Keywords section, you’ll include capabilities of the Group.
      i. Please note that Group Keywords are typically the most general in nature. You’ll enter in more specific Keywords about your Project(s) and Topic(s) later on.
      ii. Click the “Save” button in the top right corner.

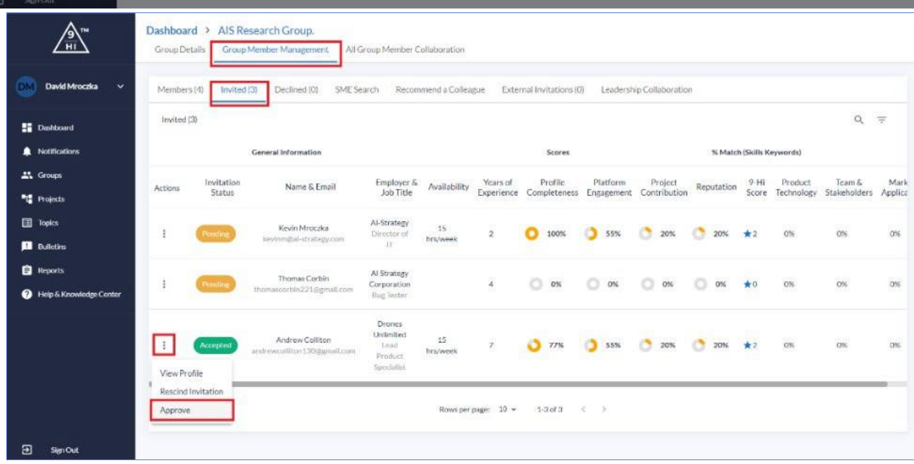
5. You can invite your Group team members now or after establishing a Project. To start inviting members, click the “Group Member Management” tab at the top of the screen. **<u>ONLY</u>** IE Groups can include any user on the 9-HI platform, but all other Groups must only include employees.
   a. If users have 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”. Be sure to check out



   the advanced features using the Orion AI Agent to search and filter for great SME team members.
   b. All Group types can invite SMEs that are not yet 9-HI members. All you need is their first name, last name, and e-mail address to send them an “External Invitation” to join 9-HI™.
   c. To do this click the “External Invitations” tab then click the “Invite New SME to 9-HI” button.

d. After being invited, the invitee will receive alerts via their email address and/or 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".



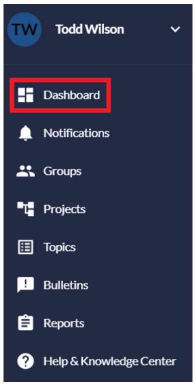


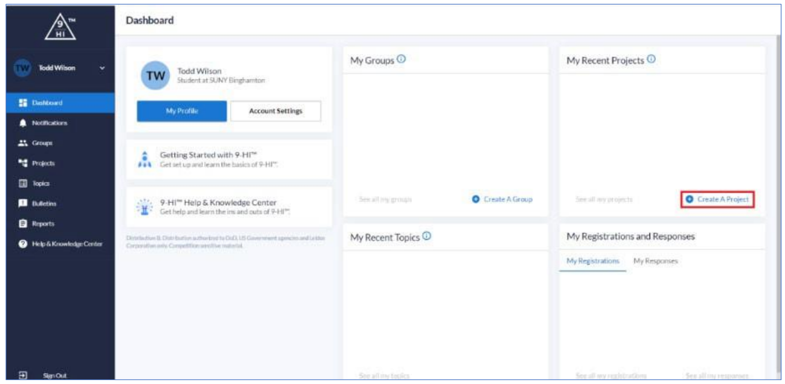
9-HI has a convenient payment system utilizing "STRIPE" 3rd party software for payment transactions and to track taxes for any 1099 SME consultants. This feature is enabled after fees and terms are negotiated between a Consultant and a Program manager.

<u>Step 4: Create an IE Project</u> (Innovation Exploration (IE) Projects are highly recommended to create alignment between team members for Technology and Application needs. Innovation Exploration Projects can readily export all data to Selection and Development Projects, or users can proceed directly to other project types.)

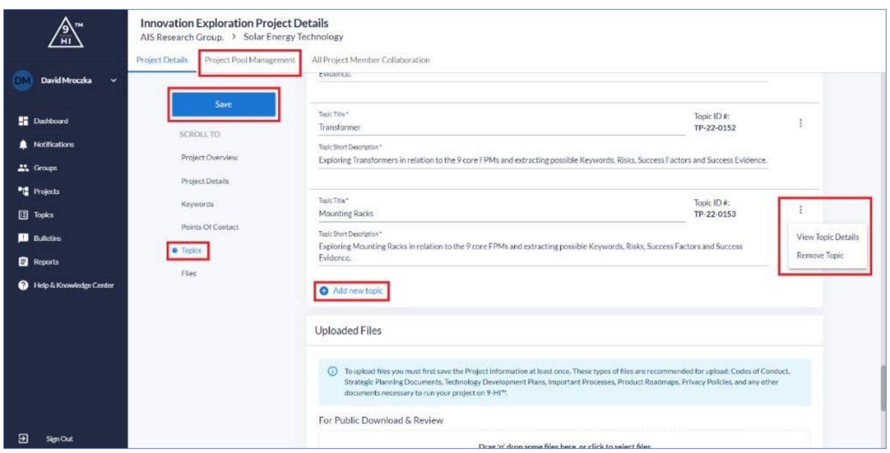
1. Use the left-hand navigation menu and click on "Dashboard".

2. On your Dashboard, find the “My Projects” card click on “Create a Project”.





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.
5. In the “Topics” card, complete all required fields denoted with an asterisk (*). Complete the “Topic Title” and “Topic Short Description” fields first, you will add in more details about your Topic(s) later on.
6. After completing all required fields and saving the project, you will enable the “Topic Details Page” where you can add additional Topic details to your Project. These Topics are where the essential data for the technology will be entered.
    a. You can use the actions menu (3 vertical dots) to “View Topic Details” or “Remove Topic”.



7. You are now ready to invite Project Pool members to your IE Project, following the same process as inviting Group members, but you’ll be working in the “Project Pool Management” tab instead.

<u>Step 5: Begin researching and/or entering information for your Topic(s) on the Topic Details Page(s)</u> (if one is not set up for you already)

1. Next, select “View Topic Details” from the three vertical dots on the Project Details page. This takes you to the Topic Details page where you enter in the details about your Topic(s).
2. On the Topic Details Page, 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, just like you did for Group and project members, but using the “Topic Team Management” tab instead.
4. Complete the “Risk Identification” tab (see below).
    a. Refer to the [Mapping Risks and Success Factors]() article for more detailed instructions
5. Complete the “Success Factor Identification and Mapping” tab (see below).
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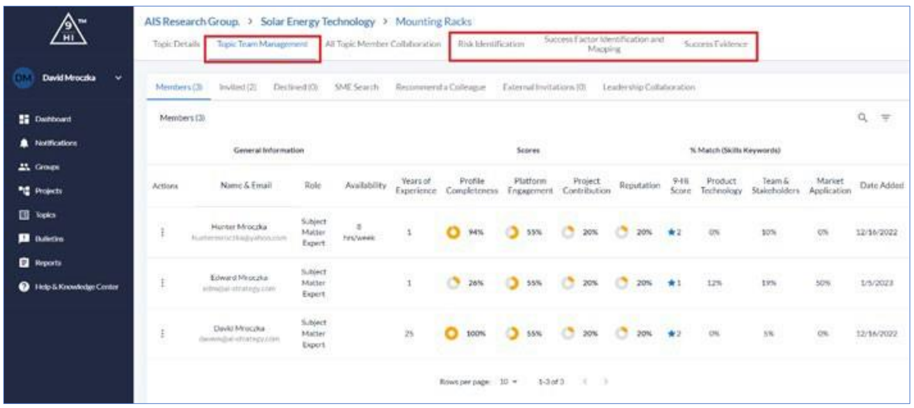
6. Complete the “Success Evidence” tab (see below).
    a. Refer to the help informational bubbles at top of the Success Evidence page for more detailed instructions.



CONGRATULATIONS!

YOU HAVE JUST COMPLETED YOUR FIRST 9-HI™ IE PROJECT!

IE Projects are discoverable by Program Managers with Technology needs and can readily be imported into Selection and Development Projects.