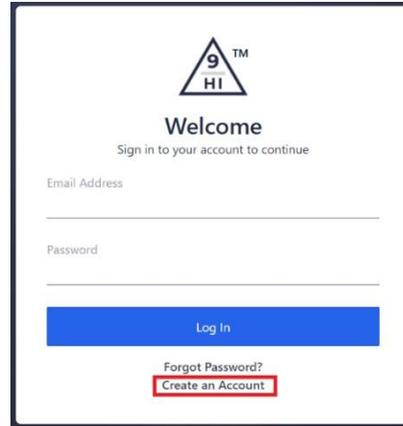


Step by Step Instructions for New Users

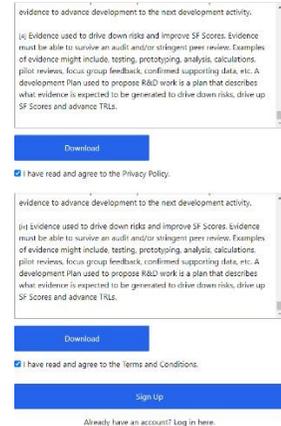
IMPORTANT We Highly recommend our new automated onboarding process. Please contact Hunter at hunterm@ai-strategy.com to request our automated onboarding template. If you do not choose our automated onboarding process, you will need to follow the step-by-step process below.

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.



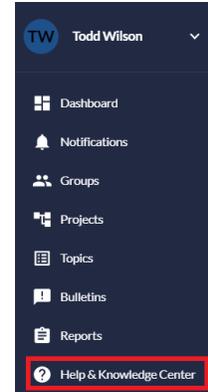
The screenshot shows a 'Welcome' page with the 9-HI™ logo at the top. Below the logo, it says 'Welcome' and 'Sign in to your account to continue'. There are two input fields: 'Email Address' and 'Password'. A blue 'Log In' button is positioned below the password field. At the bottom, there are two links: 'Forgot Password?' and 'Create an Account', with the latter highlighted by a red box.



The screenshot shows a page with two identical text blocks. Each block contains a 'Download' button and a checkbox labeled 'I have read and agree to the Privacy Policy.' The second checkbox is checked. Below the second checkbox is a 'Sign Up' button, which is highlighted by a blue box. At the bottom, there is a link: 'Already have an account? Log in here.'

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.

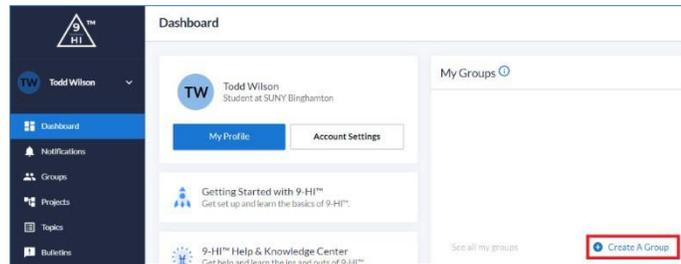
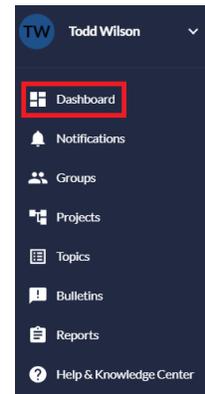


Step 3: Create a Group (for Program Managers if one is not set up for you already)

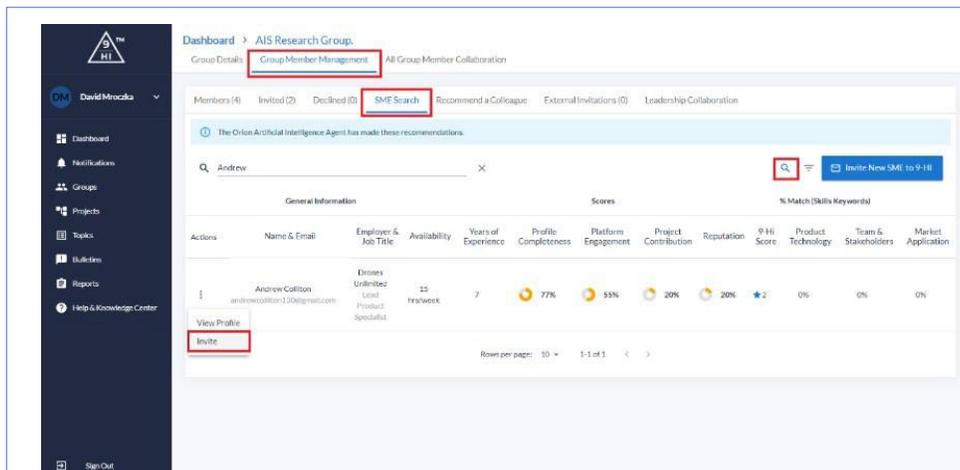
1. Visit the Help & Knowledge Center and review the 9-HI™ Quick Start article [For SMEs Interested in Advancing New Technologies with Innovation Exploration Projects](#).

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 (*).



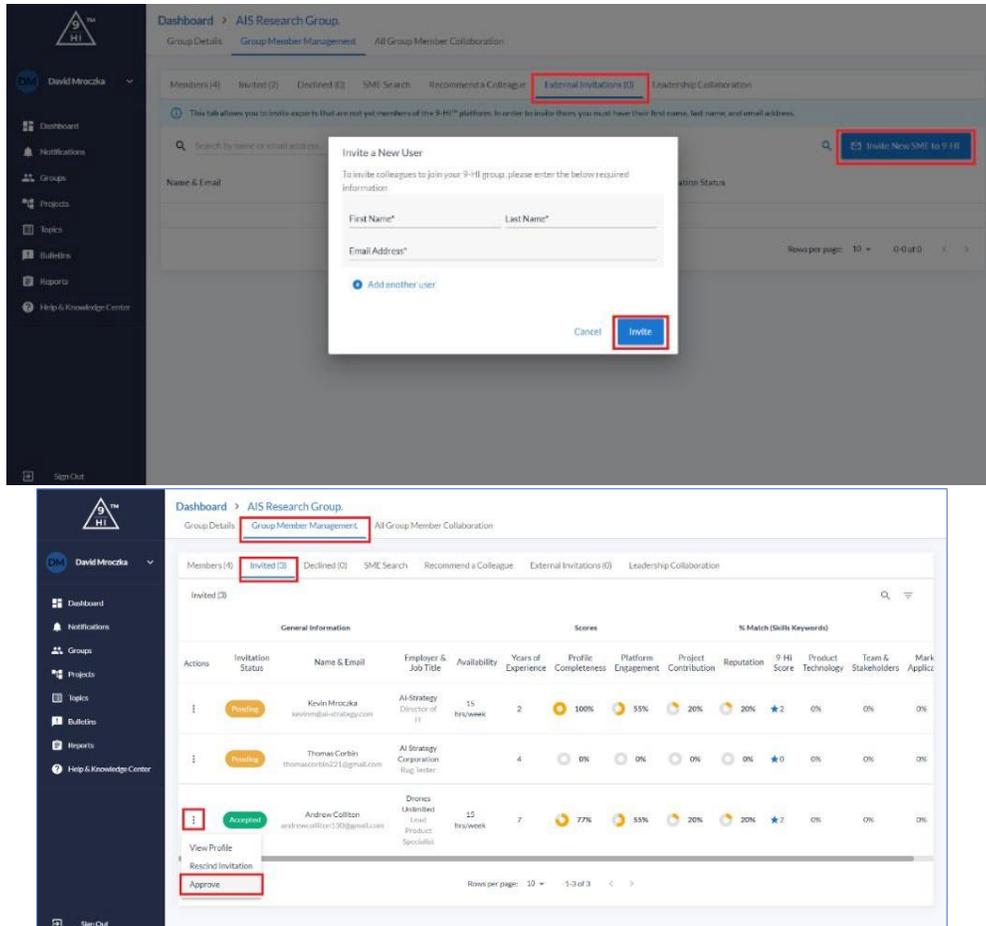
- f. In the Keywords section, you’ll include capabilities of the Group.
 - i. Please note that Group Keywords are typically the most general in nature. You’ll enter in more specific Keywords about your Project(s) and Topic(s) later on.
 - ii. Click the “Save” button in the top right corner.
- g. You 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. **ONLY** IE Groups can include any user on the 9-HI platform, but all other Groups must only include employees. 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. **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.** 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.

For instruction on setting up your first 9-HI Project after you join the 9-HI Platform click this link <https://9-hi.helpscoutdocs.com/article/496-project-topic-set-up>