# Welcome to the new My DI Community!

We're glad you're here! This guide provides step-by-step assistance for performing the most important tasks in the My DI Community. We think using the My DI Community will be intuitive for most, but the following steps should set you up for success as you get started! If you'd like to see these tasks demonstrated in action, please watch the <u>short training video that walks you through the basics</u>.

#### Activate yourself as a user on the My DI Community

On or close to launch day, you'll receive an email in your inbox with a prominent link. Click that link to establish your password and activate your access to My DI! The email will look something like this (though probably a bit nicer). To get started, you'll click the link.

| Sandbox: Welcome to Data Innovations  |                   |
|---|-------------------|
| DI noreply@salesforce.com <noreply@salesforce.com> on behalf of<br/>Data Innovations <cpinto@blackirongroup.com><br/>To: Tricia Bennett</cpinto@blackirongroup.com></noreply@salesforce.com>  | Today at 10:59 AM |
| Hi Mary,<br>Welcome to Data Innovations! To get started, go to <u>https://nam02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fcpqde</u><br><u>datainnovations.cs202.force.com%2Flogin%3Fc%3DF4ynh2XxQy1NjaU5pSrRtbUmE08LKzB3DSMNGb9vaR1U0PzRS0YQV57HEZy</u><br>Username: <u>mary.martin@bennettmedical.com</u><br>Thanks,<br>Data Innovations |                   |

Next, you'll be taken to a screen like the one below that will prompt you to establish and confirm your password. Once you click 'Change Password' you'll land on the My DI Community home page.

| Enter a new password for<br>mary.martin@bennettmedica<br>include at least: | I.com. Make sure to |
|--|---------------------|
| 8 characters   |                     |
| <ul> <li>3 characters</li> <li>1 letter</li> </ul>                         |                     |
| I number   |                     |
| New Password   |                     |
|  | Good                |
| Confirm New Password   |                     |
|  | Match               |
| Change Pa  | ssword              |



# Login to the My DI Community after initial activation

After your initial activation, you'll return to the My DI Community login page each time to enter your username and password. Most browsers can be set to remember your usernames and passwords for you. The URL will be <u>datainnovations.force.com/login</u> Add this login URL to your bookmarks. Here's a view of the login page:

| WEL  | COME TO THE DATA INNOVATIONS COMMUNITY |
|------|--|
| *    | olivia.lopez@bennettmedicalce          |
| ô    |  |
|      | Log in                                 |
| Forg | ot your password?                      |
|      |  |

## Reset a password

If you're unable to remember your password, you can quickly reset it. Start by going to the datainnovations.force.com/login page. Click the "Forgot your Password" link. You'll be prompted to enter the email address associated with your My DI Community username, and you'll click 'Reset Password'.



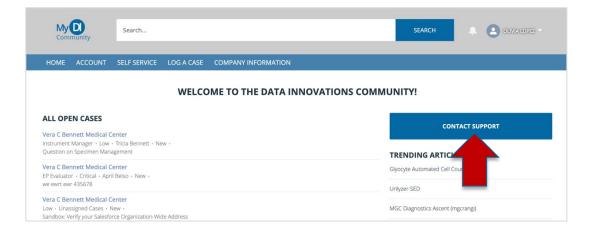
The My DI Community will send you a link, much like the one you received at activation, that prompts you to establish and confirm a new password. Once you've set your new password, you'll be taken into the My DI Community.

You should not have to contact DI Customer Support to reset your username and password. The only time it would be necessary to contact Customer Support would be if you inadvertently deleted your initial activation email before logging in for the first time.



#### Submit a Case (aka contact Customer Support)

Once you've successfully logged in, you can **Submit a Case.** There are four places you can do so: on the home page, on the "log-a-case" tab, on the "Company Information" tab, and on the small menu accessed from your user profile. Each link allows you to contact Data Innovations Customer Support by logging a Case. For this job aid, we'll start by clicking the **Contact Support** button on the Home page.



A **New Case** page displays on which you can provide information about your case by capturing a subject and a short description. The *Case Status* will default, along with your *Contact Name*, as the 'submitter'. Specify the Data Innovations *Product* you're referring to along with your *Software Version* if you know it, and even choose the specific Licensed Data Innovations solution you're referring to from the *Assets* field. The more information you provide when creating the case, the more helpful we can be responding to it! When you've shared as much as you can, click 'Confirm'. Here's a screen image:

| Subject  | * Status                         |   |
|--|----------------------------------|---|
| Help with a new instrument connection  | New                              |   |
| Description  | Account Name                     |   |
| I'm working to connect a new hematology instrument and am having some challenges with the driver. Can you help me? |                                  |   |
| Product  | *Contact Name                    |   |
| Instrument Manager   | 🖾 Olivia Lopez                   | × |
| /ersion  | Asset                            |   |
| 8.17.00 (IM-2020)  | Instrument Manager Base Software | × |
|  | DNFIRM                           |   |



After confirming your New Case form, your Case is immediately added to the Customer Support queue where it will be prioritized for response. You'll also get a confirmation email providing you with the Case Number.

As a reminder, if your Case is urgent, please call Customer Support at +1 (802) 658-1955 so we can assist immediately.

# Collaborate with Data Innovations Customer Support through My DI

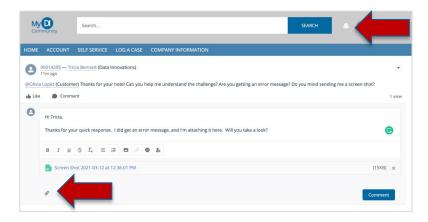
The new community lets you collaborate with Data Innovations Customer Support using a social media like 'Post' feature located in the right sidebar of submitted Cases. You do not have to stay logged in to receive responses. Your default My DI setting ensures that you get an email alert when your Support Engineer mentions you in a post.

When our team replies back to you, you'll not only get an email referring to the Case and new comments in your email inbox, but you'll also see a little red number show up on your My DI Community Notifications bell.



To **Reply** to the posts, you can either click into the **View/Comment** link provided to re-enter the community or you can reply to the email. Clicking the hyperlinked 'Case Number' will also return you to the community where you can view Case details and any previously submitted comments.

If you're already in the My DI Community, you can click the bell to view and reply to any posted comments, and click the paper clip icon to upload files to share from your local computer (see screen image below).

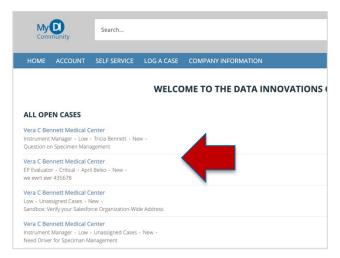




#### Check the status of open Cases

You may have multiple cases open at one time. You can check the status of your cases in three ways.

1. Your **Open Cases** display on your My DI home page along with Case status.



2. There's an **All My Cases** report accessible right from your home page. This report can also be exported to an Excel spreadsheet.

| WELCOM   | E TO THE DA | TA INNOV               | ATIONS COMMU         | NITY!  |  |                            |                   |
|--|-------------|------------------------|----------------------|--|--|----------------------------|-------------------|
| ALL OPEN CASES   |             |                        |                      |  | ITACT SUPPORT                                  |                            |                   |
| Vera C Bennett Medical Center<br>Instrument Manager - Low - Tricla Bennett - New -<br>Question on Specimen Management        |             |                        | T                    | RENDING ARTICL                               |  |                            |                   |
| iera C Bennett Medical Center<br>P Foulator - Ortical - April Belso - New -<br>e en tor 45357                                |             |                        |                      | Glyogte Automated Cell Counter<br>Univer SED |  |                            |                   |
| Vera C Bennett Medical Center<br>Low - Unassigned Cases - New -<br>Sandbox: Verify your Salesforce Organization-Wide Address |             |                        |                      | GC Diagnostics Ascent (r                     | ngcrang)                                       |                            |                   |
| Vera C Bennett Medical Center<br>Instrument Manager - Low - Unassigned Cases - New -<br>Need Driver for Speciman Management  | ном         | ACCOUN                 |                      | LOG A CASE CO                                | DMPANY INFORMATION                             |                            |                   |
| Vera C Bennett Medical Center<br>Low - Unassigned Cases - New -<br>Help met  |             | Report: Ca<br>All My C | ses<br>Cases         |  |  | Q Add Cha                  | n Y C' Edit Y     |
| New All  | Tot:<br>20  | I Records              |                      |  |  |                            | Save As<br>Export |
| All My Cases   |             | Status 💌               | Date/Time Opened 🕴 💌 | Case Number                                  | Subject  | ۳                          | -                 |
| My Account's Assets  | 1           | New                    | 3/12/2021 12:20 PM   | 00014295                                     | Need help connecting a new Hematology instru   | ment - problem with Driver |                   |
| , recount of record  | 2           | New                    | 3/11/2021 4:54 PM    | 00014294                                     | Help me with my Driver please!?                |                            |                   |
|  | 3           | New                    | 3/10/2021 9:14 AM    | 00014293                                     | Help with Hernatology Driver                   |                            |                   |
|  | 4           | New                    | 3/10/2021 8:18 AM    | 00014292                                     | Help with a driver for a Hematology instrument |                            |                   |
|  | 5           | New                    | 3/9/2021 4:46 PM     | 00014291                                     | Help with Hematology Driver                    |                            |                   |
|  | 6           | New                    | 3/9/2021 4:14 PM     | 00014290                                     | Help with a Hernatology Driver                 |                            |                   |
|  | 7           | New                    | 3/9/2021 3:59 PM     | 00014289                                     | Help me please!                                |                            |                   |
|  | 8           | New                    | 3/5/2021 10:57 AM    | 00014288                                     |  |                            |                   |
|  |             |                        |                      |  |  |                            |                   |

3. Finally, under the **Accounts** tab, there's a **Cases** sub-tab, where you can click a drop-down arrow to choose from different views, including: Open Cases, Closed Cases, All Cases, and Recently Viewed. Your view will default to 'Recently Viewed', but you can click the ▼ to explore other views or click the pushpin to establish a new default.



| Cor          |                                   | Search   |                                |                                   |   |                      |   |
|--------------|-----------------------------------|--|--------------------------------|-----------------------------------|---|----------------------|---|
| HOME         | ACCOUNT                           | SELF SERVICE                                     | LOG A CASE                     | COMPANY INFORMATION               |   |                      |   |
| ASSET        | S CASES                           | ACCOUNT  |                                |                                   |   |                      |   |
| Recen        | tly Viewed 🔻                      | × 🛑  |                                |                                   |   |                      |   |
| 5 items      | Updated a few set                 | conds ago  |                                |                                   |   |                      |   |
| 5 items      | • Updated a few sev<br>Case Nu ~  | conds ago Subject                                |                                |                                   | ~ | Status               | ~ |
| 5 items<br>1 |                                   | Subject  | cting a new He                 | matology instrument - problem wi  | ~ | <b>Status</b><br>New | ~ |
|              | Case Nu… ∨                        | Subject  | _                              |                                   | ~ |                      | ~ |
| 1            | Case Nu ∨<br>00014295             | Subject<br>Need help connect<br>Question on Spec | imen Managei                   |                                   | ~ | New                  | ~ |
| 1<br>2       | Case Nu ✓<br>00014295<br>00014228 | Subject<br>Need help connect<br>Question on Spec | imen Manager<br>our Salesforce | ment<br>Organization-Wide Address | ~ | New<br>New           | ~ |

In any of the lists, you can click the blue hyperlinked Case number or the subject to take you to the Case display where you can view details about the Case, review comment history, and share additional comments through the 'Post' feature.

| Product<br>Instrument Manager    | Priority<br>Low      | Case Owner    | Status<br>New | S | Share an  | update                                    | Sha       | re       |
|----------------------------------|----------------------|---------------|---------------|---|---|---|-----------|----------|
|                                  |                      |               |               |   | Sort by:  |   |           |          |
| DETAILS RELA                     | TED                  |               |               |   | Most Recent / 💌                                 | Q Sear                                    | ₹.        | C        |
| <ul> <li>Description</li> </ul>  |                      |               |               |   | Tricia Bennett<br>49m ago @Olivia Lopez (Custo) | (Data Innovations                         |           | ▼<br>Tan |
| status                           | Case Own             | ner           |               |   | you help me understa                            |   |           |          |
| New                              | / A Tric             | ia Bennett 👔  |               |   | getting an error mess                           | age? Do you mind                          | sending r | ne a     |
| Case Number                      | Asset                |               |               |   | screen shot?                                    |   |           |          |
| 00014295                         | Instrume<br>Base Sof | ent Manager 🥜 |               |   | i Like D Com                                    |   | mment • 2 | view     |
| Partner/Customer Number          | Instrume             | nt Name       |               |   | Olivia Lopez (C<br>32 minutes ago               |   |           | *        |
| ccount Name                      | Product              |               |               |   | Hi Tricia,                                      |   |           |          |
| Vera C Bennett Medical<br>Center | Instrume             | ent Manager 🥢 |               |   |   | ır quick response.<br>, and I'm attaching |           |          |
| Contact Name                     | Version              |               |               |   | you take a look                                 | 0   |           |          |

## View licensed Data Innovations solutions (aka Assets)

Sometimes, you'll need information about your Data Innovations licensed product(s). You can find simple information about these licensed solutions by looking at your 'Assets'. There are two ways to view information about your Assets. The first is by viewing your Asset report, which is found on your home page below your 'All My Cases' report (not shown here).

The second, shown below as a sub-tab under the 'Account' option, is the most intuitive. This option allows you to drill into a particular **Asset** and view other **Related** Assets and Cases.



To locate your list of Assets, begin by clicking the **Account** tab, then choose the **Assets** sub-tab. Your primary Data Innovations Assets will display. From this display, you can click the desired **Asset Name** to display **Details** and click the **Related** sub-tab to see any related Instrument Manager modules, Connections, or Case History for that Asset for Cases submitted or completed in the My DI Community.

| HOME   | ACCOUNT                     | and the second sec |                        | COMIT | NY INFORMATION  |                  |
|--|-----------------------------|--|------------------------|-------|---|------------------|
| ASSETS                                       | CASES                       | ACCOUNT  |                        |       |   |                  |
|  | <b>y Viewed</b>             |  |                        |       |   |                  |
|  | Asset Name                  | -  |                        | ~     | License Number  | ~                |
| 1  | Instrument M                | Manager Base Soft  | ware                   |       | 12345678  |                  |
| 2  | Instrument M                | Manag  | Connection             |       |   |                  |
|  |                             |  |                        |       |   |                  |
| In In  | <sup>iset</sup><br>Istrumen | t Manager B  |                        |       |   |                  |
| Account                                      | ennett Media                |  | License Nu<br>12345678 |       | Click the Re<br>sub-tab to s<br>Modules,<br>Connection<br>hardware, a | see<br>s,        |
| Account<br>Vera C B                          | ennett Media                | Cal Center   | License Nu             |       | sub-tab to s<br>Modules,<br>Connection                                | see<br>s,<br>and |
| Account<br>Vera C Br<br>DETAILS<br>Asset Nam | ennett Media                | Cal Center   | License Nu             |       | sub-tab to s<br>Modules,<br>Connection<br>hardware, a<br>Case Histor  | see<br>s,<br>and |

## Download a Driver

To download a Driver, start by clicking the **Self-Service tab** which will take you to a dynamically populated list of topics, manufacturers, and products from which you'll be able to drill-down to find the appropriate driver. For this job aid, we will demonstrate by clicking the 'Drivers' link.



| HOME ACCOUNT     | SELF SERVICE | LOG A CASE | COMPANY INFORMATION |                            |
|------------------|--------------|------------|---------------------|----------------------------|
|                  |              |            | TOPICS              |                            |
| RODUCTS          | -            |            |                     |                            |
| NSTRUMENT MAN    | AGER         |            | LOCALE FILES        | LABORATORY PRODUCT MANAGER |
| DOCUMENTATION    |              |            | SOFTWARE DOWNLOADS  | JRN                        |
| DRIVER DOWNLOADS |              |            | TRAINING            | PRODUCT SOLUTION OFFERING  |
| KNOWLEDGE AND GE | NERAL INFO   |            | EP EVALUATOR        | NEXTGEN                    |
| KNOWN ISSUES     |              | (          | DRIVERS             |                            |

Next, we'll choose to display one of the Drivers listed. To download the Driver, click the hyperlinked file name to open the file.

| DRIVERS  | MANUFACTURER > MCKESSON<br>Glyocyte Automated Cell Counter<br>() Mar 5, 2021 - Knowledge | r   | Files (1)  |
|--|--|---|--|
| Lead Care Plus Plus - tex LSU - Secondar Slycocyte Automated Cell Counter Univer - Med LSU - Secondary | TITLE®<br>Głyczyte Automated Cell Counter<br>SYSTEM OR DEVICE®                           | URL NAME<br>Glyocyte-Automated-Cell-Counter<br>MANUFACTURER®<br>Advanced Instruments Inc. | View All TRENDING ARTICLES Glyosyte Automated Cell Councer |
| Villyzer-SED   | DRIVER NAME<br>Glyocyte Automated Cell Counter   | DRIVER VERSION  | Urilyzer-SED<br>MGC Diagnostics Ascenc (mgcrangi)          |
|  | CATEGORY   |   | Lead Care Plus   |

Now choose the **Download** button or link that allows you to download the file to a local directory. The download link might look different depending on your browser. Once you've downloaded the file, the action is saved to your Data Innovations account so we can keep track of the files you have.



