

# Welcome to Delphi Digital's Vital Information Manager

## 1. Log In, Adjust Text Size, Return Home, Log Out

- Enter www.delphivim.com
- Type In Your User Name and Password. Click "Go"
- Adjust Size of Text by Clicking "Text Larger" or "Text Smaller"
- To Return to this Home Page, Click "Home" or "Return Home"
- To Log Out at anytime, simply Click "Log Out"

## 2. Change Your Password

- Click "Sharing Tools." Click "Member Tools"
- Click "Edit Account"
- Click "Change Password"
- Type in Current and New Password. Click "Change Password"

## 3. Upload a File from the Hard Drive

- Click "Basic Tools." Click "File Import Tools"
- Click "Browse" and then Choose File. Click "Open"
- Click the Drop Down Box under Category
- Select the Appropriate Category and Click "Store"
- You will see Confirmation of Document being Stored
- To further confirm File Storage, Click "Basic Tools." Click "Manage Documents" to view all of the saved documents

## 4. Add a "Viewer"

- A "Viewer" is able to access information specified by you on VIM. Example-My Executor is a "Viewer" for my selected Insurance/Wills files.
- Click "Sharing Tools" then Click "Viewer Tools"
- Click "Add Viewer"
- Create and Type in Viewer's Login Name and Click "Create New"
- Type in Viewer's Email address and a Password
- Type "365" for Viewer's Access of One Year
- Click "Save"
- You will see a red Confirmation of Created Viewer
- An Email Confirmation is automatically sent to the Viewer

## 5. Grant a File to a "Viewer"

- Click "Sharing Tools." Click "Grant Access Tools"
- For your selected document, Click "Grant Document"
- Select the "Viewer" from Drop Down Box
- Type in 365 days for 1 year access. Click "Send"

## 6. Add a "Member"

- Click "Sharing Tools"
- Click "Member Tools"
- Under "Add Member," Click "Add Member"
- Create and Type Member's Login Name. Click "Create New"
- Complete requested information, Click "Save"
- See "?" Tabs for Info to Select Proxy vs Standard Member
- You will see red Confirmation of Added Member
- An Email Confirmation is automatically sent to the Member

## 7. Create a New Category

- Click "Advanced." Click "Category Tools"
- Click "Add Category"
- Create and Type in your Category Name
- Select "No" if you DO NOT want this to be the Lead Category (or Default) in the Category Drop Down Box
- Click "Add Category." You will see the New Category listed

## 8. To Save a File to a New Category

- Click "Basic Tools." Click "File Import Tools."
- Browse your hard drive for the appropriate File
- Pick and Click New Category in Drop Down Box. Click Store

## 9. Fill Out Individual Forms (Files)

- First, Fill Out "Emergency Information Forms" for Adults, Children, Infants, Older Adults (Parents, In-Laws.) Then Fill Out other relevant forms in VIM.
- To Begin Filling out Emergency Information Forms, Highlight the "Family" Tab and Highlight "Adult." Do Not Click either.
- Click "Emergency Info"
- To See Your Highlighted and Clicked Path, See the Top of the Page.
- Click "Fill Out Form." This allows you to complete new forms and see previously created forms.
- You will see the numerous template forms that you can fill out.
- Begin with Family Member Information-Adult. Click "Fill Out Form"
- Type in the Information in the "Form Data" section. Under "File Info" type the File Name and Description. Always Include the Person's Name (ex. Angus Demo) in both. Click "Submit"
- For sensitive info, type in directions to find it...ex. Call Mary
- Your file is now listed. Click "View"
- You will see your information. Click "Close X" to return to VIM.



### **10. Edit/Update File**

- To Edit/Update a File, First Click “Fill Out Form.” Click “Update”
- See your existing info under “Current Form Data.” Fill out the “New Form Data”. Edit “File Name” and “Description” if necessary. Click “Submit”

### **11. Assemble Combined Files**

- Fill out several more files.
- Begin to Assemble the Combined Files by Checking the Boxes
- Type in the File Name and Description.
- Click “Assemble Document” at the bottom of this screen
- Your combined document is now listed. Click the arrow by “Select” for options.

### **12. View and Print Files**

- Click “Manage Documents”
- Find your listed Assembled Form, Click “Select”
- Highlight “View.” Click “Go”
- Here is the Assembled Form in a pdf file
- Use the functions in toolbar including “Print”, “Save”, and “Find”
- PRINT this file
- Store with other VIM hard copy.
- Save on your hard drive, if desired.
- To return to VIM Website, Click the “Back” Arrow

### **13. Search for Files**

- To Search for All Files (Assembled-”Complete” and The Sections) created under the category, in this case, Adult Emergency Info...Click “Both.” Click “Search”
- To Search for Files that are Assembled from Sections... in this case, the Angus Demo Emergency Info...Click “Complete.” Then Click “Search”
- To Search for Files that are Components-Sections (Not the Assembled Angus Demo Emergency Info File)...Click “Sections.” Click “Search”
- To Search for All Files (Complete and Sections) by Specific File Name...Type in Name. Click “Both.” Click “Search”
- You will see All of the files in this category with the typed name in the file name.

### **14. Find Files Under Other Tabs**

- For the Physicians report completed in “Emergency Info,” Highlight the tab “Medical.” Highlight “Doctors.” Click “Physicians”
- Click “Fill Out Form.” You will see the File.
- This File could also be Found by...Click “Both” and Click “Search” or Type in the Name from the File and Click “Search”

### **15. Rename Files**

- Click “Manage” to Rename this file with a more meaningful name
- Create and Type in the file name you desire. Select the Category from the drop down box. Click “Save”
- You will see your Renamed file.

### **16. Edit/Email Files**

- To Edit the File Description (if desired) and Email, Click “Edit Description/Send”
- Type Changes on File Description , Click “Save”
- Type Email address to email the File, Click “Send”
- The Email with file attachment arrives at the requested address

### **17. Execute “Quick Viewer”**

- Click “Sharing Tools.” Click “Grant Access Tools”
- For your selected document, Click “Grant Document”
- For Quick Viewer, all you need is an email address. Type in the address. Pick Access Option. Click “Send”

### **18. Start “Cherished Memories”**

- Click “Basic Tools.” Click “File Import Tools.”
- Browse your hard drive and select documents and pictures
- Select “Cherished Documents” or “Pictures” under Category.
- Click “Store.”
- To View and Manage your Cherished Memories Collections...Highlight “Family” and Highlight “Cherished Memories.” Click “Cherished Documents” or “Pictures”

### **19. Additional Support**

- For Additional Support, email info@delphivim.com for 24 hour turnaround.
- Please leave contact information (email address/telephone number) for response

