



myMRI Client Portal

User Guide

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Every released version of MRI products gets its own release notes. However, guides are only updated when changes have been made to product features that require changes to documentation. If there is no guide specific to your version, use the most recent corresponding document (which may refer to an earlier version of the software).

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Overview

The myMRI Client Portal is a self-service website where Designated Support Contacts (DSCs) can access tools and manage various needs and communications.

To access the myMRI Client Portal, go to www.mrisoftware.com and click the **myMRI** link at the top of the page (Figure 1-1).

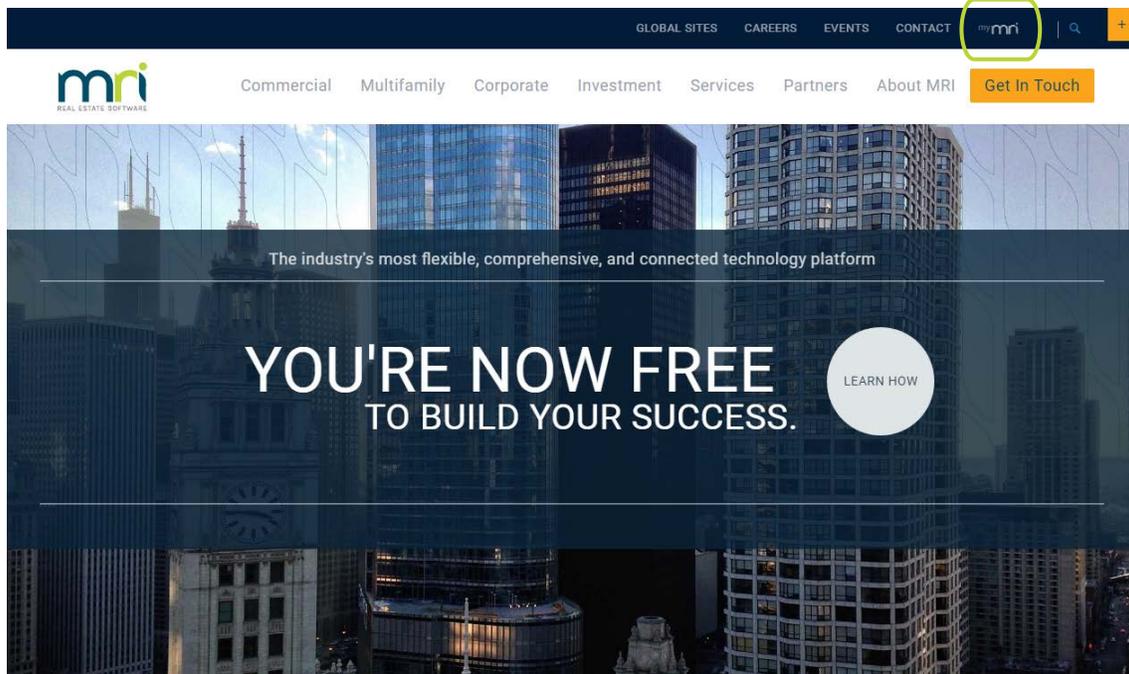


Figure 1-1. myMRI Client Portal Link

Home Page

After you log on, the **Home** page appears (Figure 1-2). The **Home** page has been designed to provide easy access to the most common areas of the myMRI Client Portal, and to inform you about what is new at MRI. Any important messages are displayed near the top of the page.

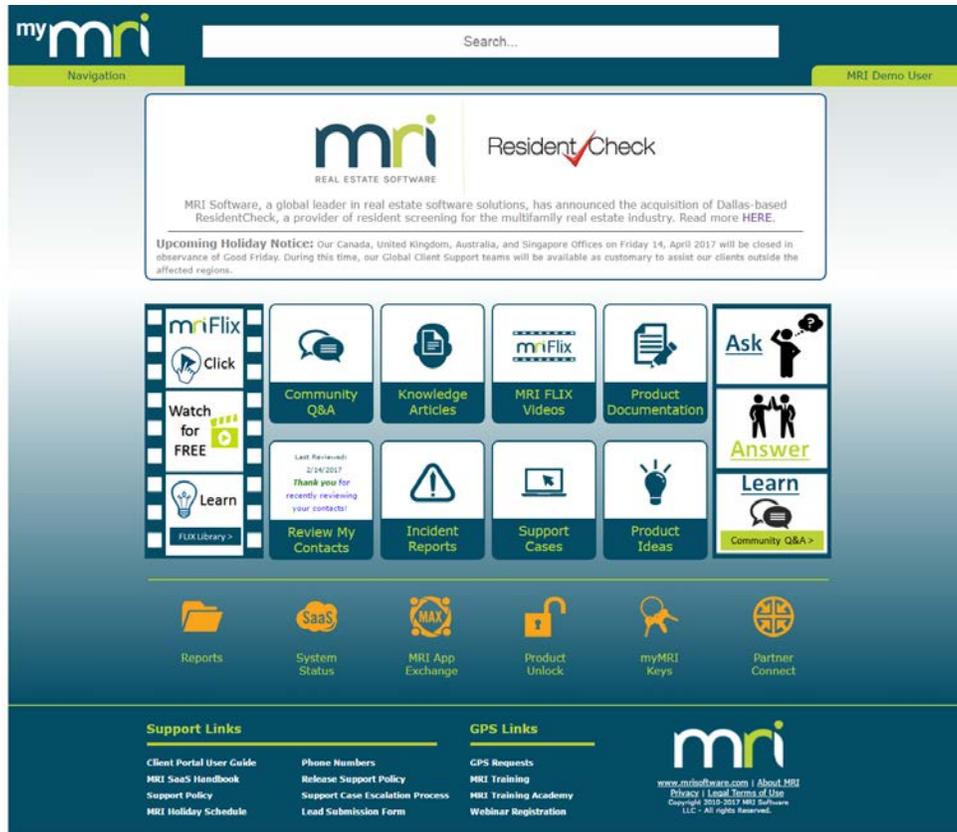


Figure 1-2. myMRI Client Portal Home Page

Navigation

The **Navigation** drop-down menu (Figure 1-3) is available from every page. From this menu, you can quickly access many of the features on myMRI. When you point to the **Recent Items** option, an additional menu expands to display the last ten items that you viewed.



Figure 1-3. Navigation Menu

Featured Resources

The following featured resources are available on myMRI:

- **Community Q&A**—A forum where you can post questions, answer questions, and review other questions that have been posted.
- **Knowledge Articles**—A vast repository of knowledge and information that has been documented and reviewed over the years by our Support agents and product experts. You can search for knowledge articles by keyword, type, product family, or application. If you submit a Support case that can be addressed by an article, a Support agent will attach the article to your case for future reference.
- **MRI FLIX Videos**—A listing of any knowledge article with an associated tutorial-style video that walks you through the content.
- **Product Documentation**—A repository where you can download various content, including release notes, installation files, and printable versions of the web Help. For more information, refer to the [“Searching and Accessing Product Documentation”](#) section on page 8.
- **Review My Contacts**—A page where you can review and update contact information for your company contacts.
- **Incident Reports**—A page with tabs where you can view incident reports (IRs) associated with you, your MRI Support cases, or your company. IRs are identified program issues within a product that have been documented and reported to MRI’s Product Management and Product Development teams. If a Support case is submitted that identifies an issue with a product, an IR will be opened and associated with the case. When the IR has been closed or resolved, the case contact will receive an email notification.
- **Support Cases**—A page where you can review and create Support cases. For more information, refer to the [“Submitting a Support Case”](#) section on page 8.
- **Product Ideas**—A page where you can propose product changes, vote on ideas from others, and provide feedback through comments. For more information, refer to the [“Submitting Product Ideas”](#) section on page 9.

Additional Resources

Below the featured resources, you can access the following additional resources:

- **Reports**—A link to the **Reports & Dashboards** page, where you can access preconfigured reports that compile information around your account, cases, and IRs.
- **System Status**—A link to the **MRI SaaS Status** page, which provides you with real-time status updates for all MRI SaaS applications, various helpful resources, and a list of regular scheduled maintenance times.

- **MRI App Exchange**—A link to MRI Application eXchange (MAX), where you can download, upload, and rate customizations that can be applied to your database.
- **Product Unlock**—A link to the **Product Unlock** page, where DSCs for on-premise clients can obtain an unlock key to use when applying for or refreshing an MRI license. For more information, refer to the “Obtaining an Unlock Key” section in the *MRI System Administration Guide*.
- **myMRI Keys**—A link to the **myMRI Account Keys** page, where DSCs can view or reset their primary account key. Your account key can be distributed to authorized employees and used to submit a GPS request. For more information about GPS offerings, or to submit a request, go to <http://www.mrisoftware.com/professional-services/>.
- **Partner Connect**—A link where you can filter through MRI’s partner network and view partners and contact information.

Using the myMRI Client Portal

Searching and Accessing Product Documentation

If you know what you are looking for, you can enter your search terms in the large **Search** field at the top of the page.

Content is stored in libraries, which group similar or related items together in one location. To filter content by a specific library, follow these steps:

1. On the **Home** page, click the **Product Documentation** button.
2. In the **Top Content** area, click **Show All**.
3. In the **Search in** field, select a library, and then click **Go**.

Note

You can also search within a specific library by entering your search terms in the adjoining field after selecting a library.

4. To download a document, select the check box next to the document, and then click **Download**.

or

Click the name of the document, and then click **Download**.

5. To subscribe to a document and be notified of any changes or updates, click the **Subscribe**  button.

Submitting a Support Case

Support cases are used to track your issues or problems with an MRI product. Before creating a case, you may want to search through MRI Knowledge Articles and existing IRs to see if the issue that you are experiencing is already documented.

To submit a case with MRI Support, follow these steps:

1. On the **Home** page, click the **Support Cases** button.
2. Click **Create New Case**.
3. In the **Record Type of New Record** field, select a record type for the case, and then click **Continue**.
4. In the **Select Entitlement** field, select the entitlement to associate with this case.
5. In the **Select Asset** field, select the asset to associate with this case.
6. In the **Subject** field, enter a short summary of the issue.

7. In the **Description** field, enter a detailed description of the issue, including as much relevant information as possible.
8. If you have an internal tracking number, in the **Tracking Number** field, enter your internal tracking number.
9. If you want to keep additional contacts informed about this case, enter up to six additional email addresses in the **Additional Contact Email** fields.
10. To include supporting documentation or files, such as spreadsheets or screen shots, click **Save and Attach**. If you do not have any supporting documentation, click **Save**.

Submitting Product Ideas

Product ideas can be enhancements to existing products, entirely new products, or any other suggestion that you have to improve MRI. You can vote on existing ideas by clicking either the **Promote** or **Demote** button next to an idea. After you create an idea, it is visible to all other myMRI Client Portal users, and an email will be sent to the appropriate MRI Software team based on the selected categories.

To submit a new idea, follow these steps:

1. On the **Home** page, click the **Product Ideas** button.
2. In the **Zone** field, select the product or category in which your idea belongs.
3. Click **Post Idea**.
4. In the **Title** field, enter a descriptive title for your idea.
5. In the **Description** field, describe your idea and why it would be useful.
6. In the **Categories** field, in the **Available** area, select the categories to which your idea applies, and then use the arrow button to move them to the **Chosen** area.
7. Click **Post**.