The One-on-One Partnering™ System Tutorial

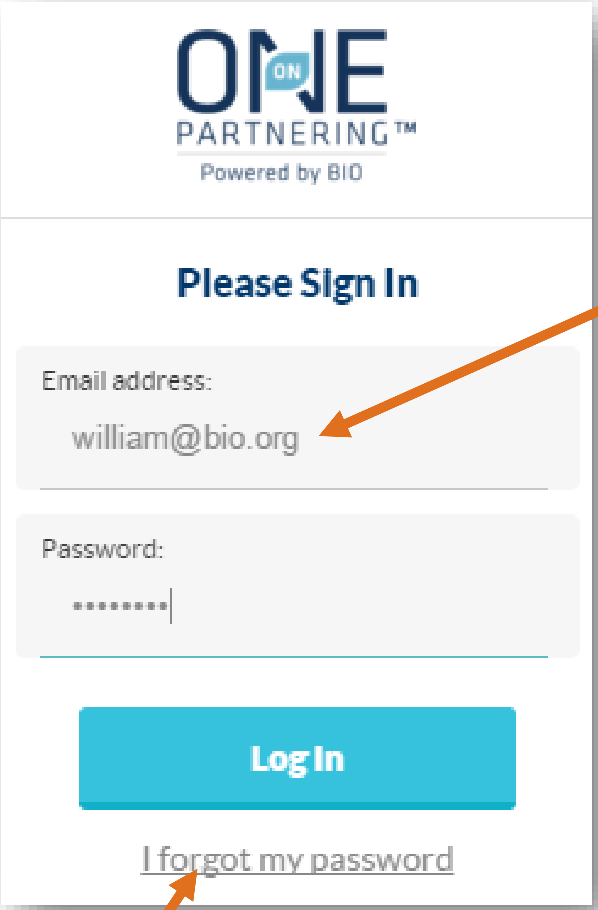
ONE ON ONE PARTNERING™

Powered by BIO

Instructions for BIO's One-on-One Partnering™ System

Logging In

- Typically, you will receive a confirmation with login instructions from BIO Partnering within **one to three business days after registering** for the event.
- If you used BIO's new partnering system at a previous event, you may use the same password. The email will also contain a link to reset your password in case you have forgotten it.
- If this is your first time using BIO's new partnering system, you will need to reset your password using the link provided in the email.



PLEASE NOTE:
Access to partnering requires that delegates use a company email address with their name attached to it. Generic (e.g. info@company.com, personal (e.g. Gmail/Hotmail) and executive assistant email addresses do not qualify.

Click here to reset your password

Home Page

Return Home

Log out/Reset Password
Access Delegate Profile

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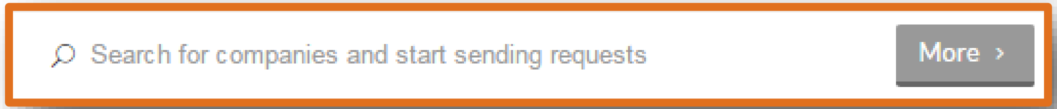
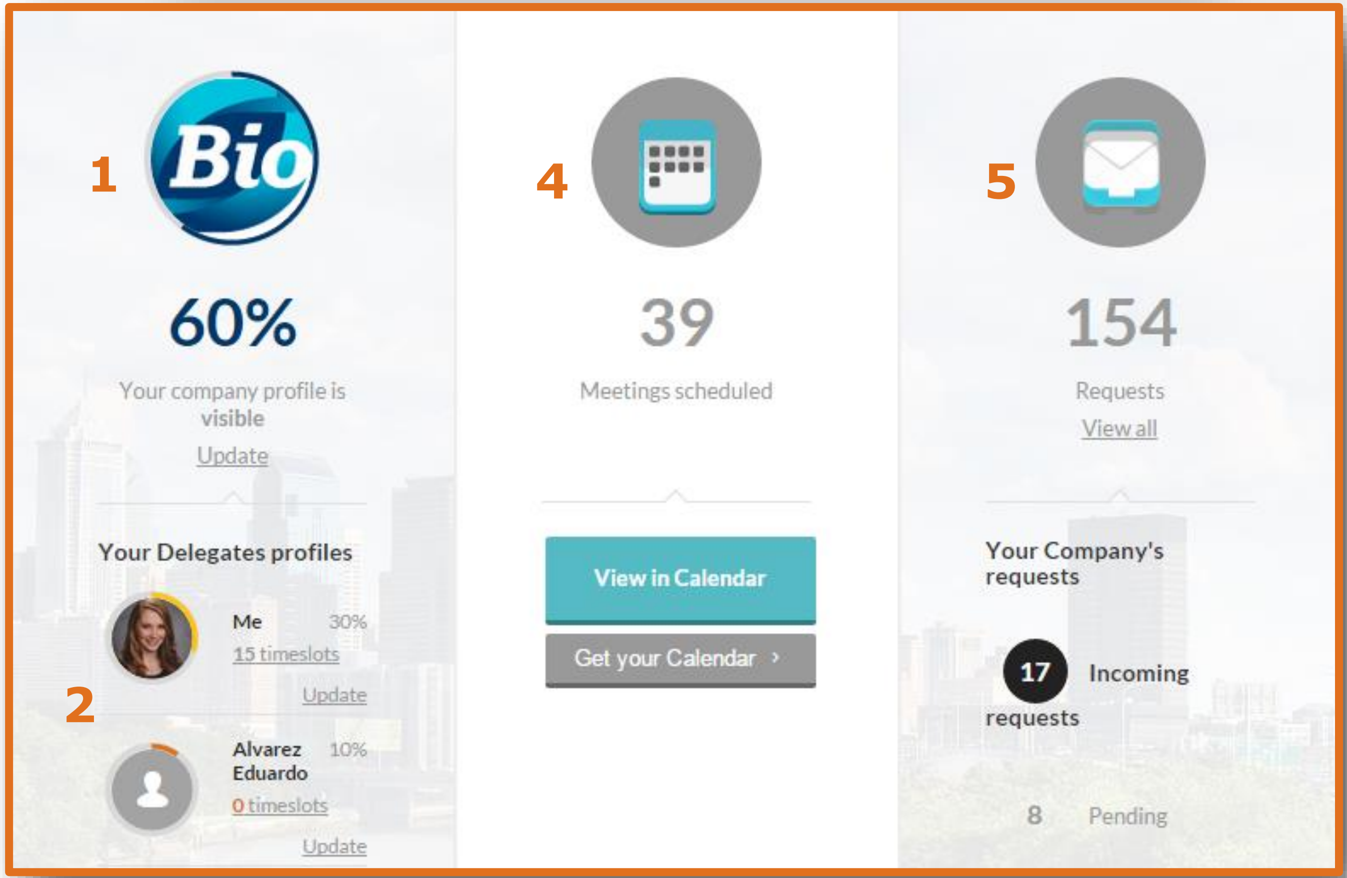




1 Company/Investor Profile

Add company information
Add company logo

2 Delegate Profile

Add personal information
Update notification preferences
Add your personal profile picture

3 Search

Search for companies
Bookmark companies
Save custom searches

4 Calendar

Update availability
Add events & programming

5 Message Center

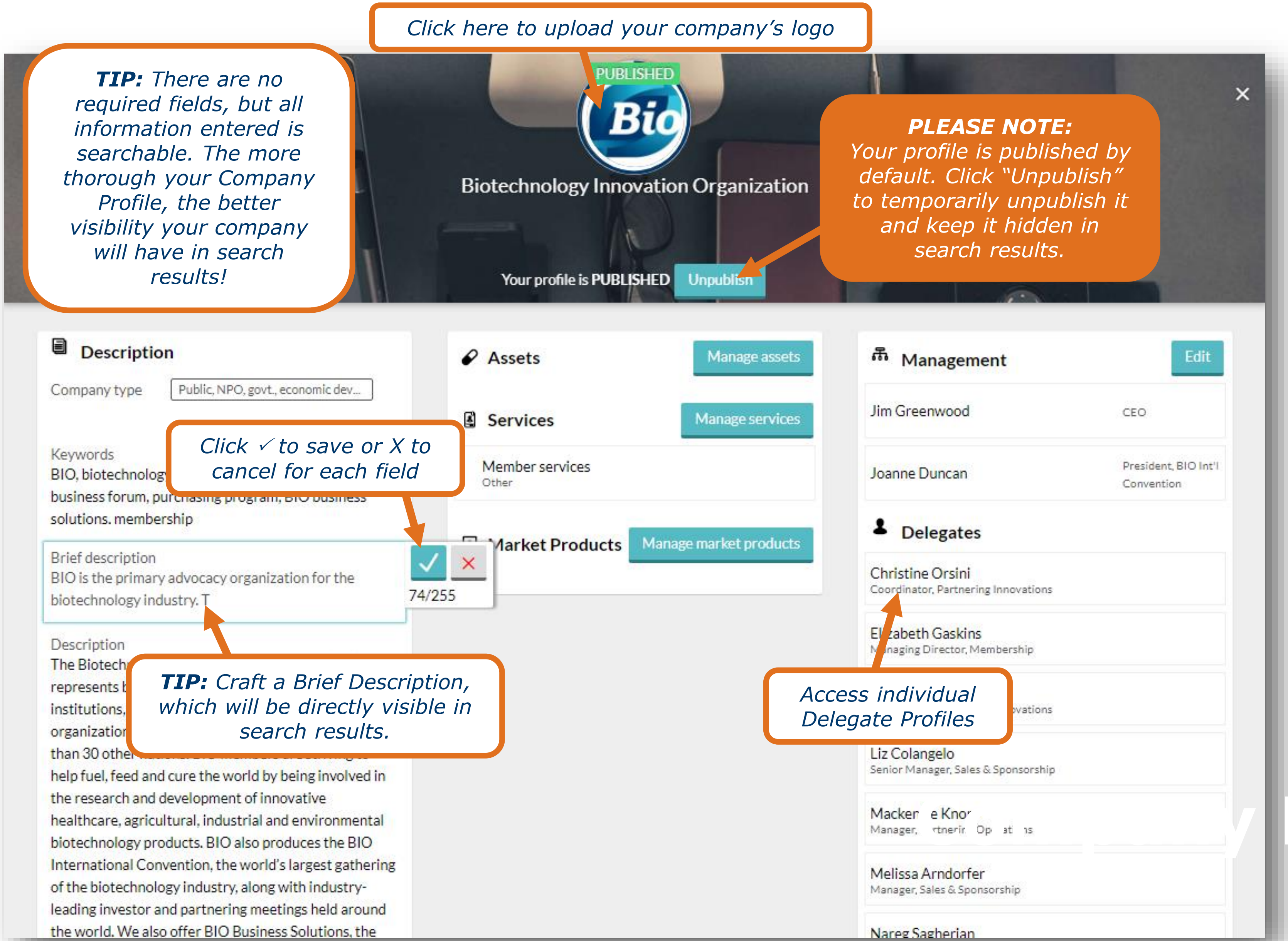
Send, accept, or decline requests
Manage outgoing & incoming requests

6 Bookmarks

View bookmarked companies, delegates, assets, products, and services

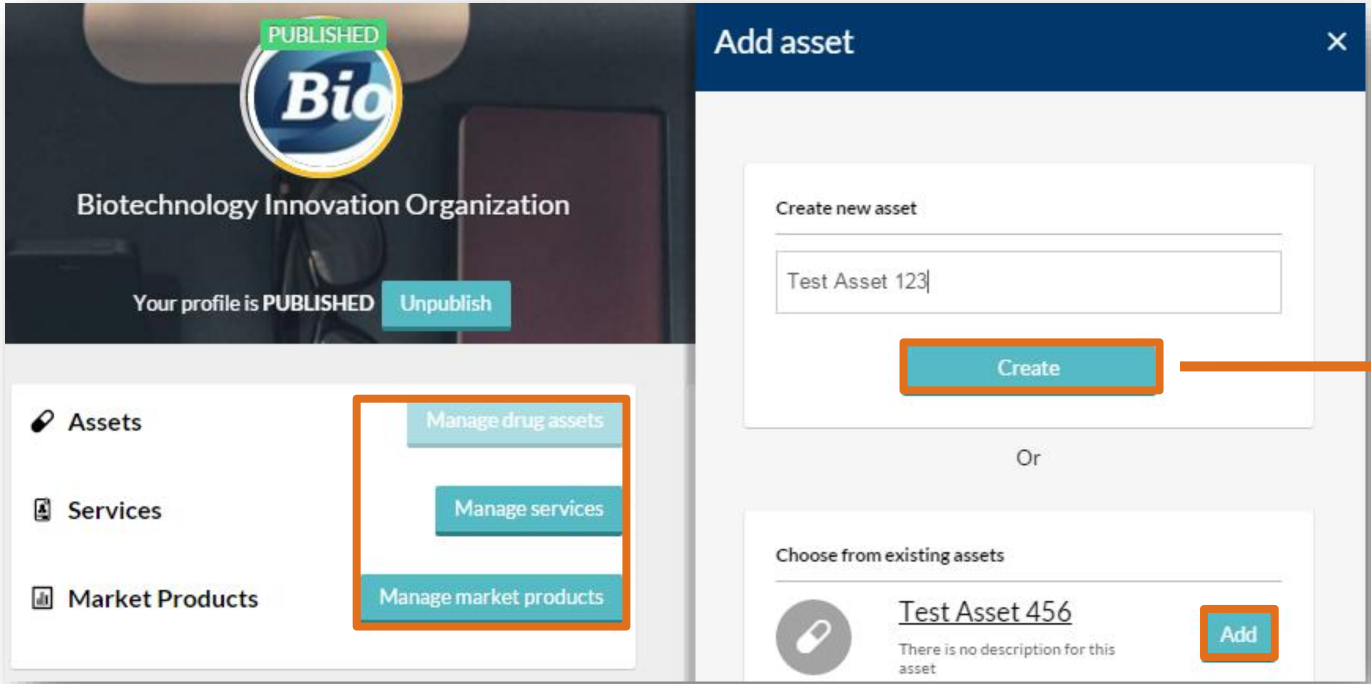
Company Profile

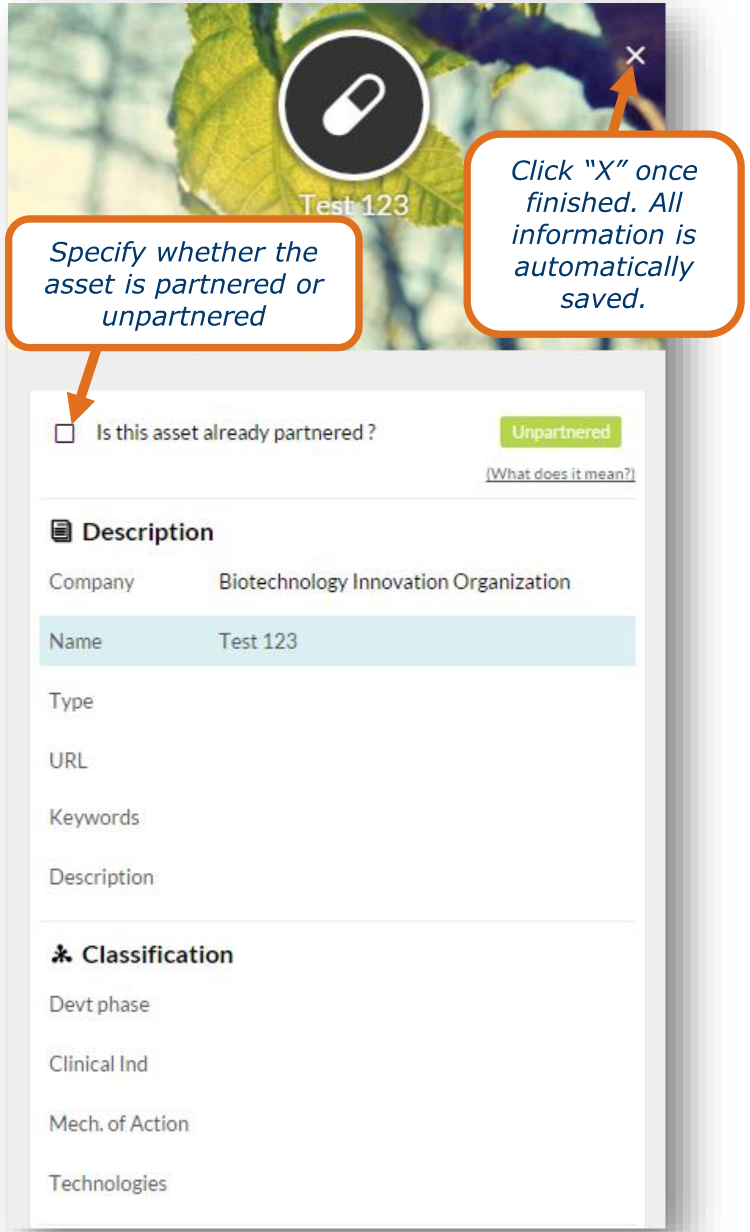
- ✓ Complete all applicable fields, especially those in the **Description, Areas of Interest, Financials,** and **Contact Information** sections
- ✓ Add **Assets, Services,** and **Market Products** if applicable
- ✓ Upload your company's logo
- ✓ Upload documents, graphics, and videos



Assets, Services, and Market Products

1. Click **Manage drug assets, services, or market products**
2. Type in the item's name to add a new name, or click **Add** to re-add existing item
3. Click **Create**
4. Complete all applicable fields, especially those found under **Description** and **Classification**
5. Upload supporting documents, graphics, and videos

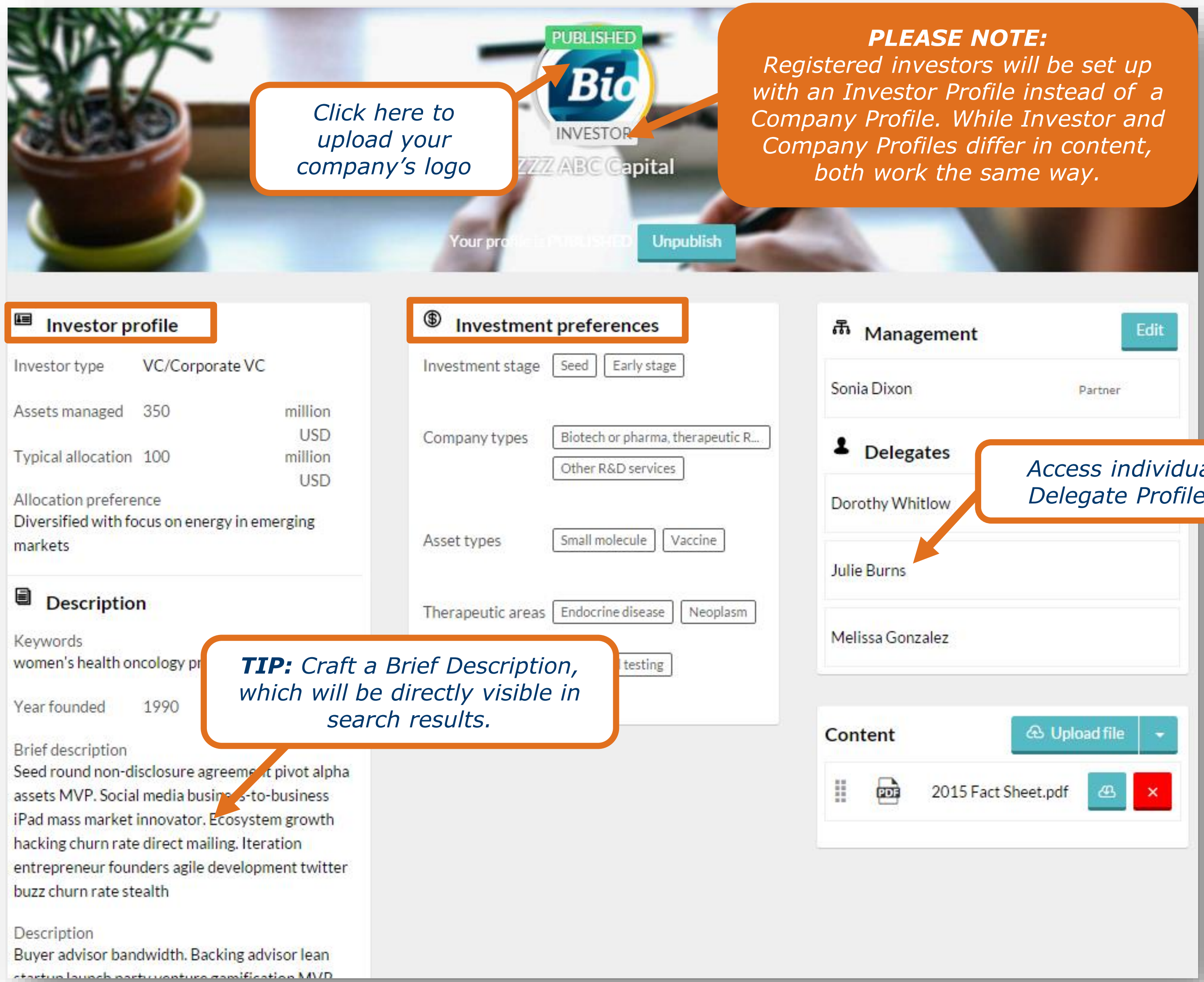




Investor Profile

PLEASE NOTE:
Your profile is published by default. Click "Unpublish" to temporarily unpublish it and keep it hidden in search results.

- ✓ Complete all applicable fields, especially those in the **Investor Profile, Description, Investment Preferences,** and **Contact Information** sections
- ✓ Upload your logo
- ✓ Upload documents, graphics, and videos



Click here to upload your company's logo

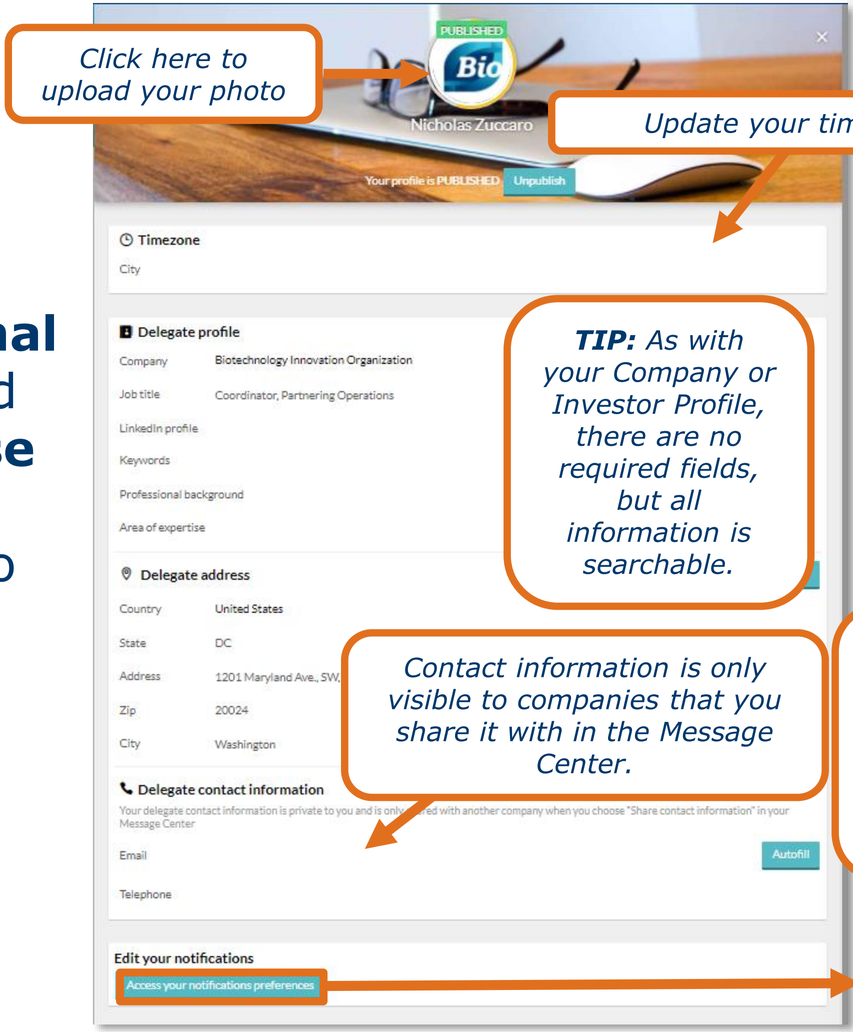
PLEASE NOTE:
Registered investors will be set up with an Investor Profile instead of a Company Profile. While Investor and Company Profiles differ in content, both work the same way.

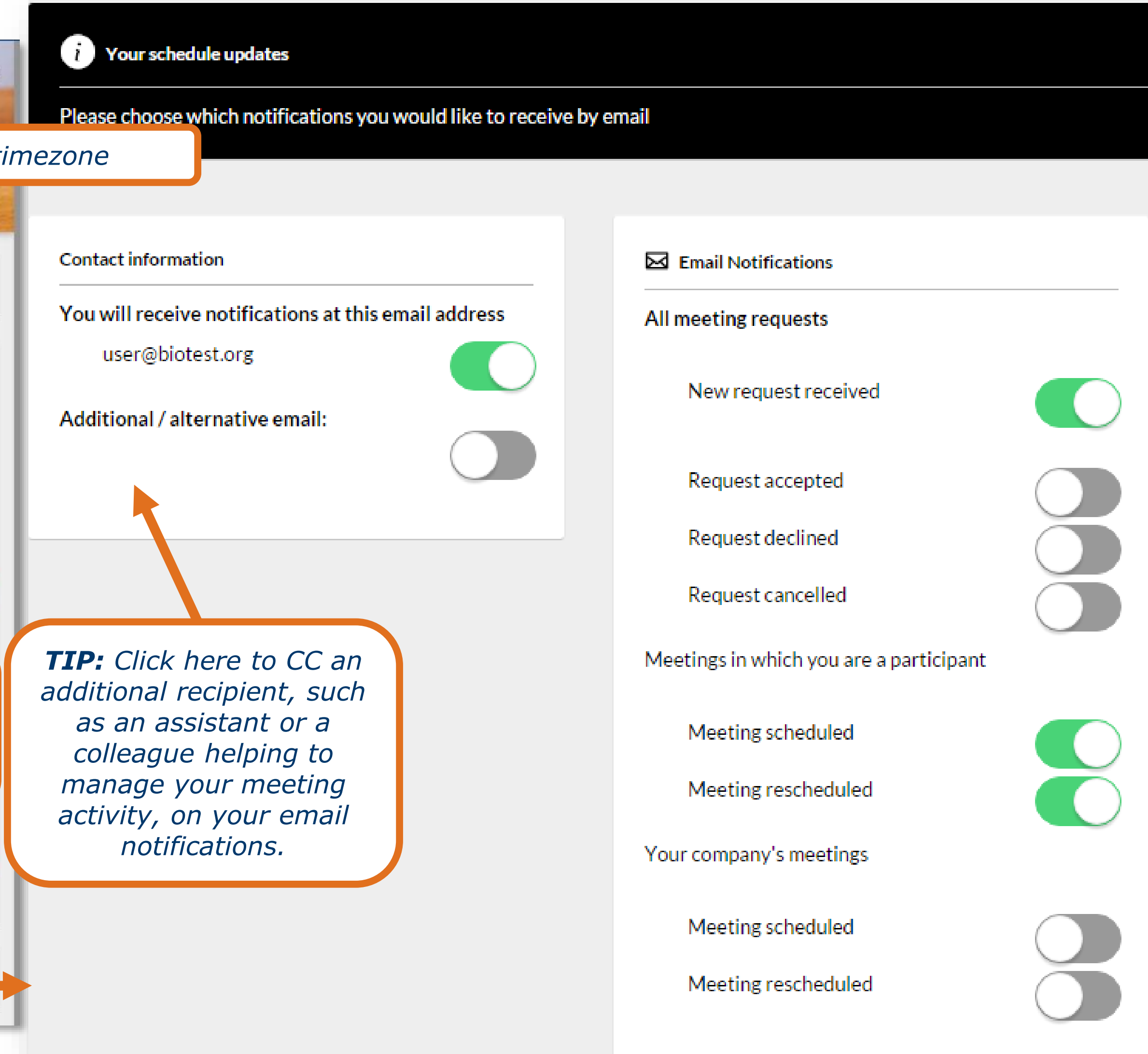
Access individual Delegate Profiles

***TIP:** Craft a Brief Description, which will be directly visible in search results.*

Delegate Profile & Notification Preferences

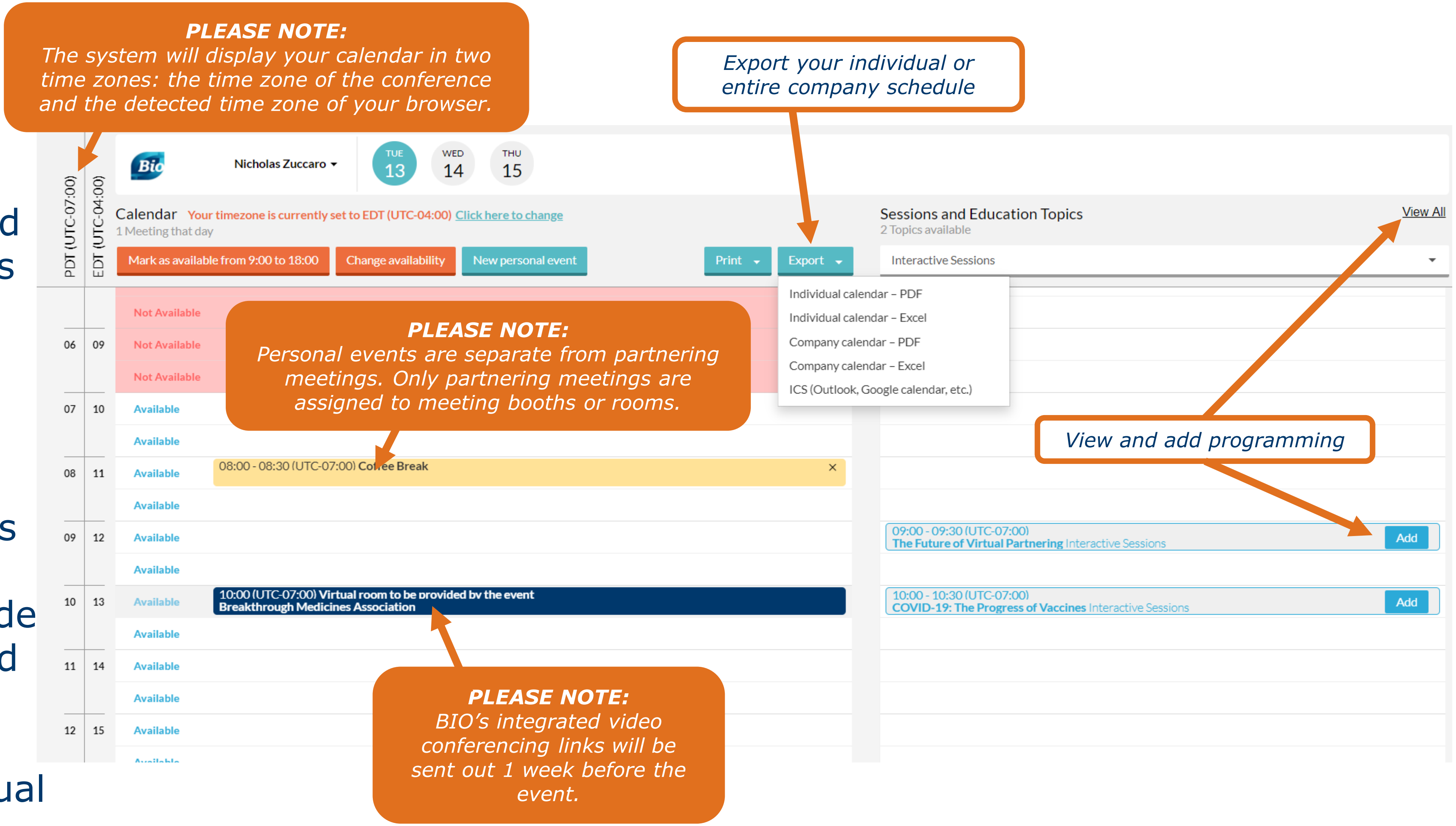
- ✓ Complete all applicable fields, especially **Job Title**, **Professional Background**, and **Area of Expertise**
- ✓ Upload your photo
- ✓ Change your local timezone
- ✓ Tailor your notification preferences





Calendar

- ✓ Update your availability
- ✓ View your scheduled partnering meetings
- ✓ Add programming sessions and presentations
- ✓ Add personal events for personal engagements outside of programming and partnering
- ✓ Export your individual and/or combined company schedule



Updating Calendar Availability

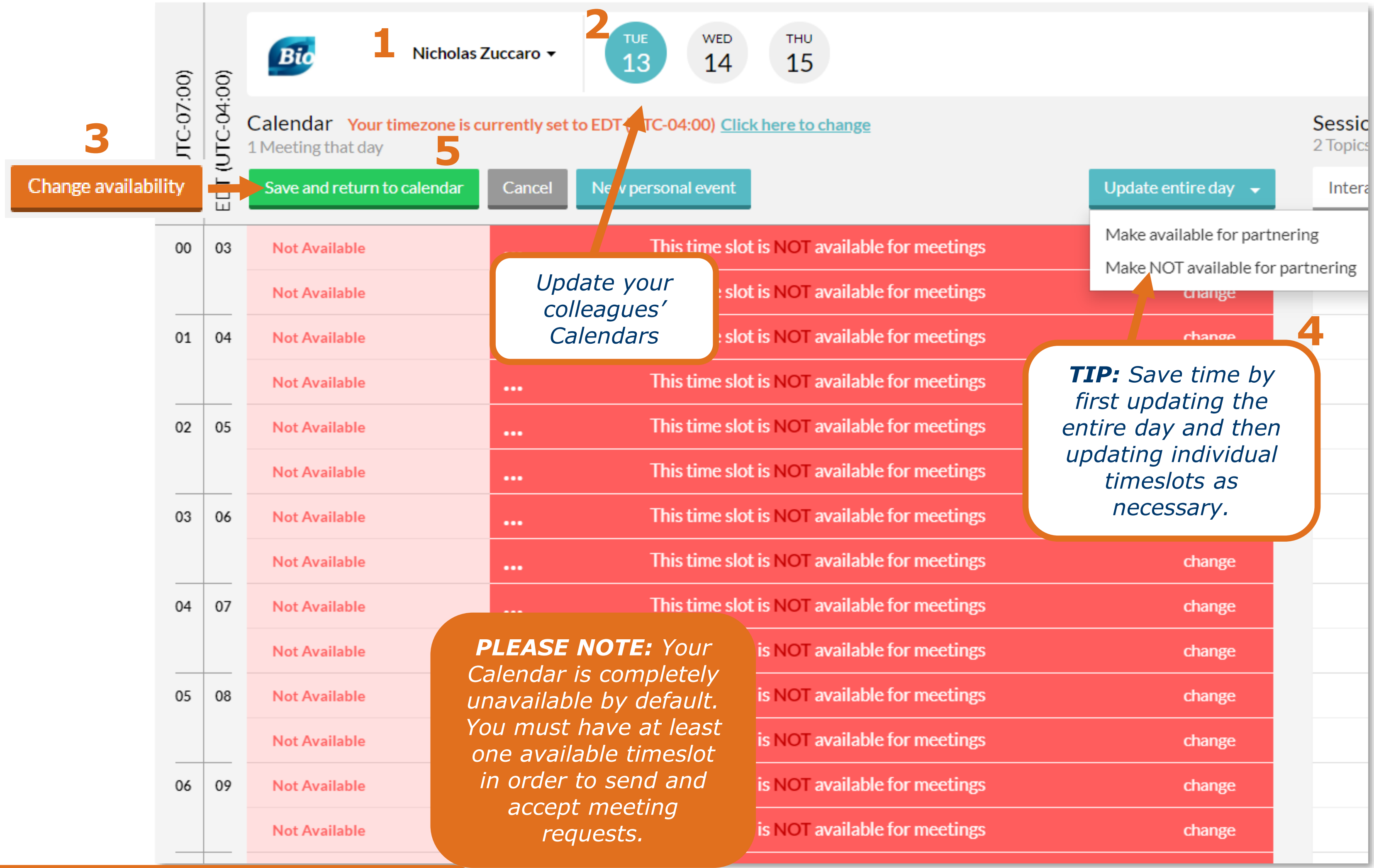
1. Select the appropriate delegate from the top left drop-menu

2. Select the correct day of the week

3. Click **Change availability**

4. Mark the timeslots available (or unavailable) by clicking **Change**, or update the entire day

5. Click **Save and return to calendar**



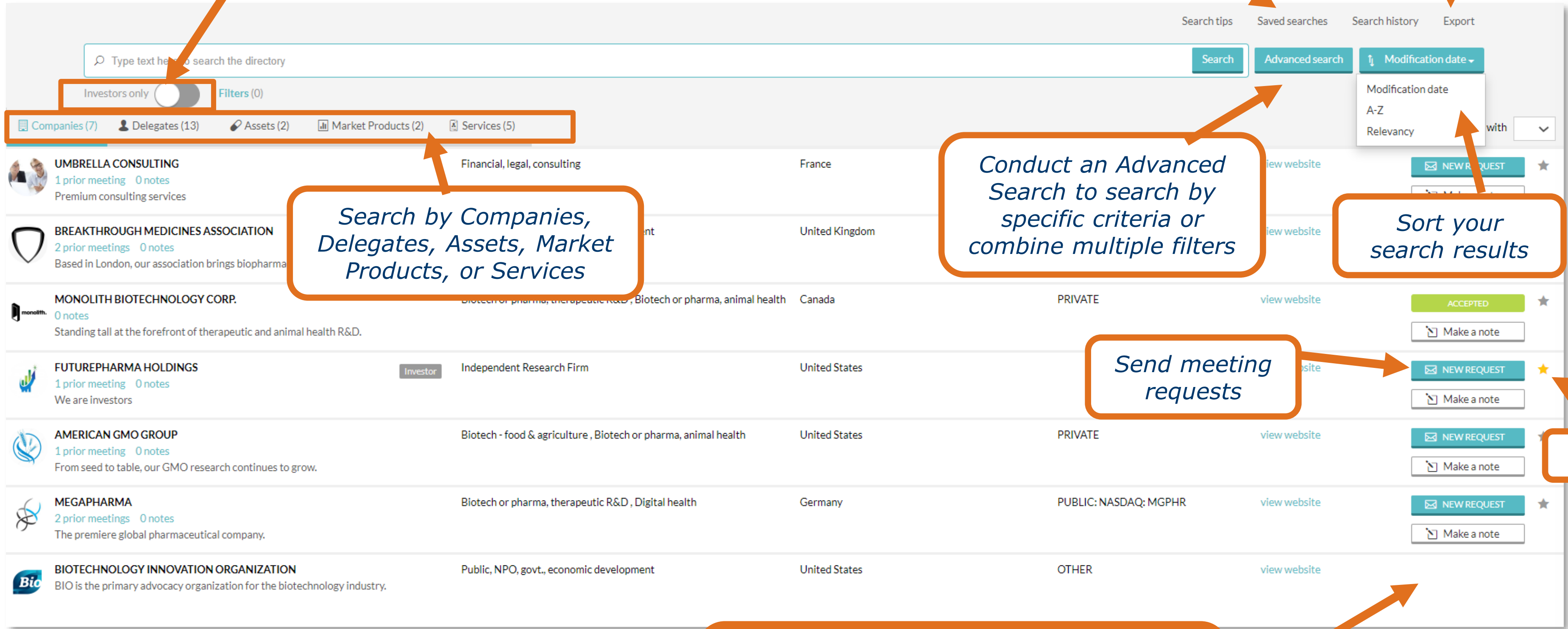
***TIP:** You can select to open your calendar from 9 AM to 6 PM in your local time zone by select the button at the top of the calendar page*

Search & Advanced Search

Search by investors only

Save specific search criteria and monitor results

Export your specific search results into Excel



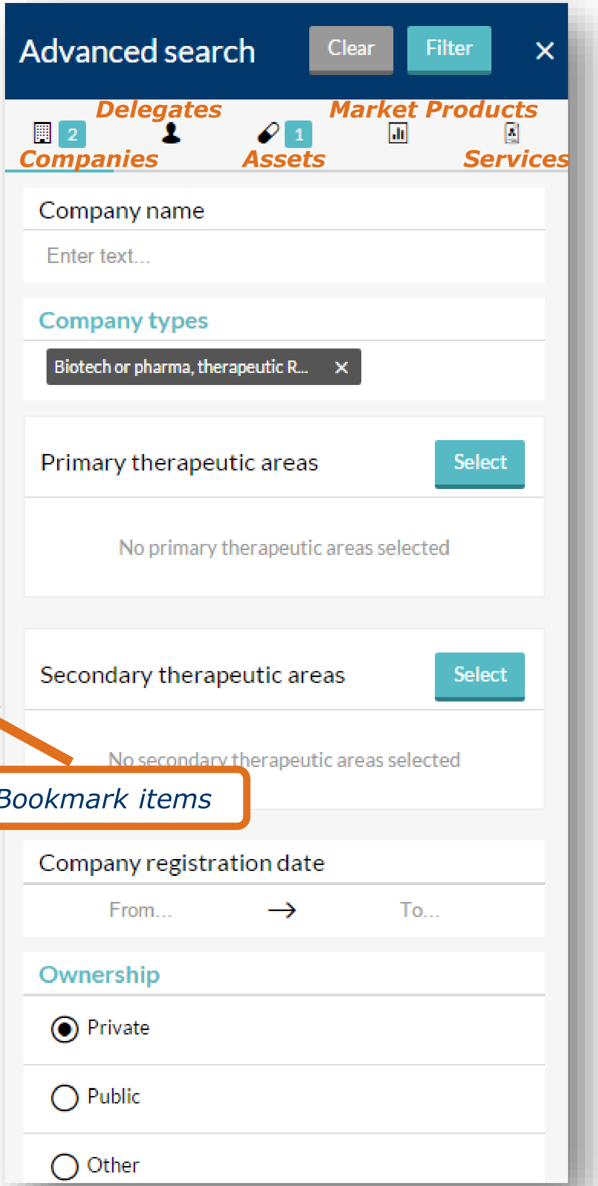
Search by Companies, Delegates, Assets, Market Products, or Services

Conduct an Advanced Search to search by specific criteria or combine multiple filters

Sort your search results

Send meeting requests

Bookmark items



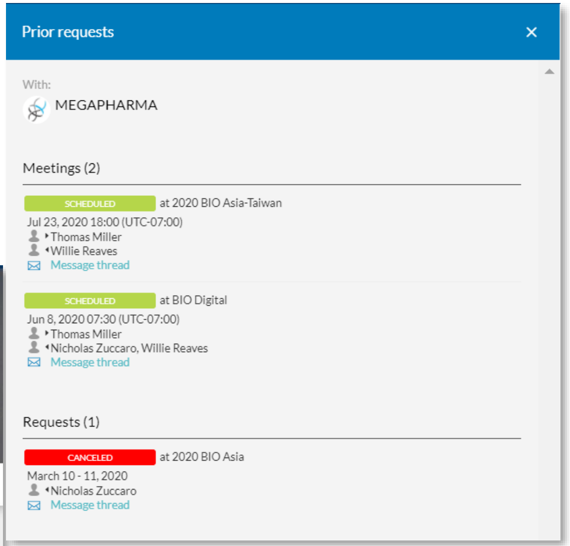
***PLEASE NOTE:** When viewing your own company in search results, you will not see "New Request" and Bookmark buttons. However, other companies will see these buttons next to your company.*

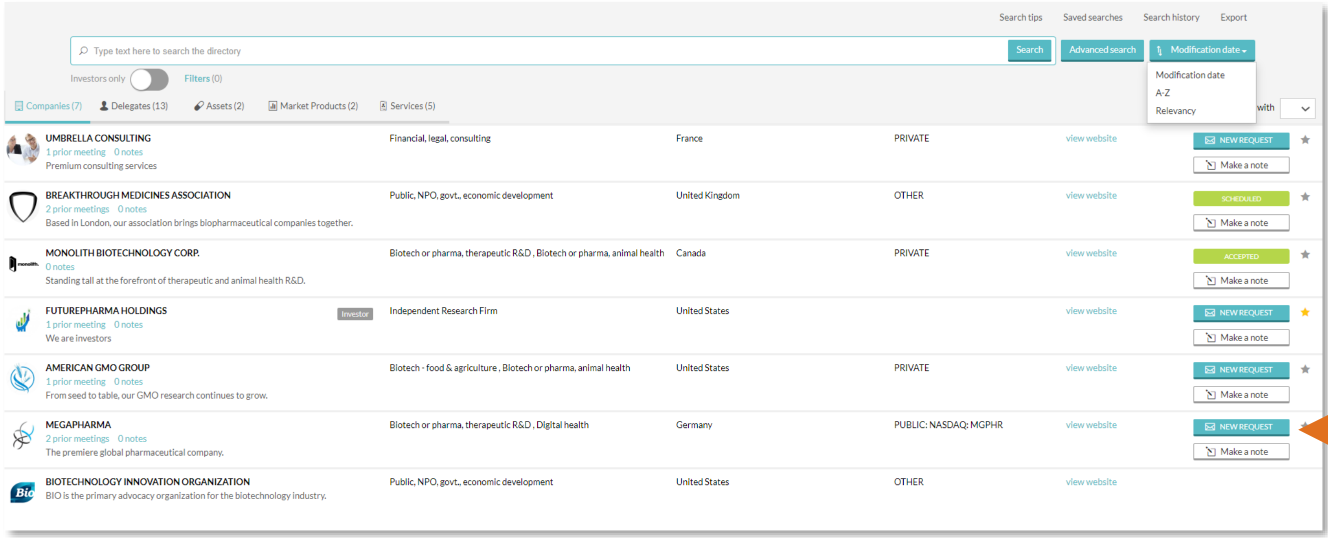
Collaboration Features

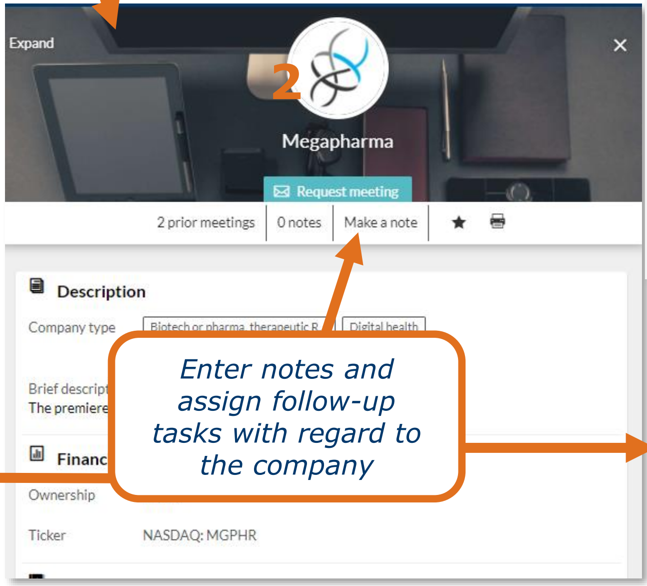
1. Prior Meetings
2. Notes

1

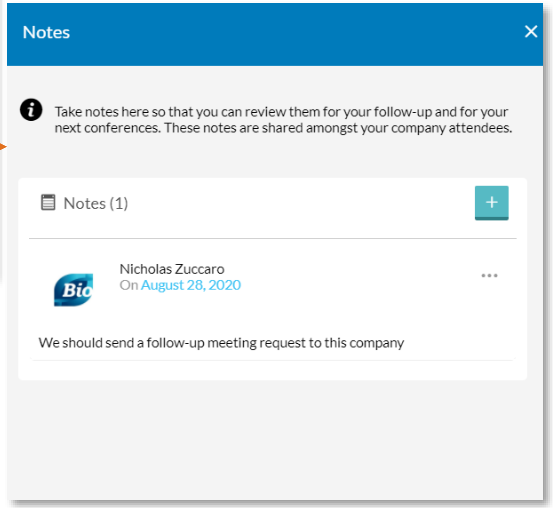
View meetings your company had with this company at current & prior BIO events







Enter notes and assign follow-up tasks with regard to the company



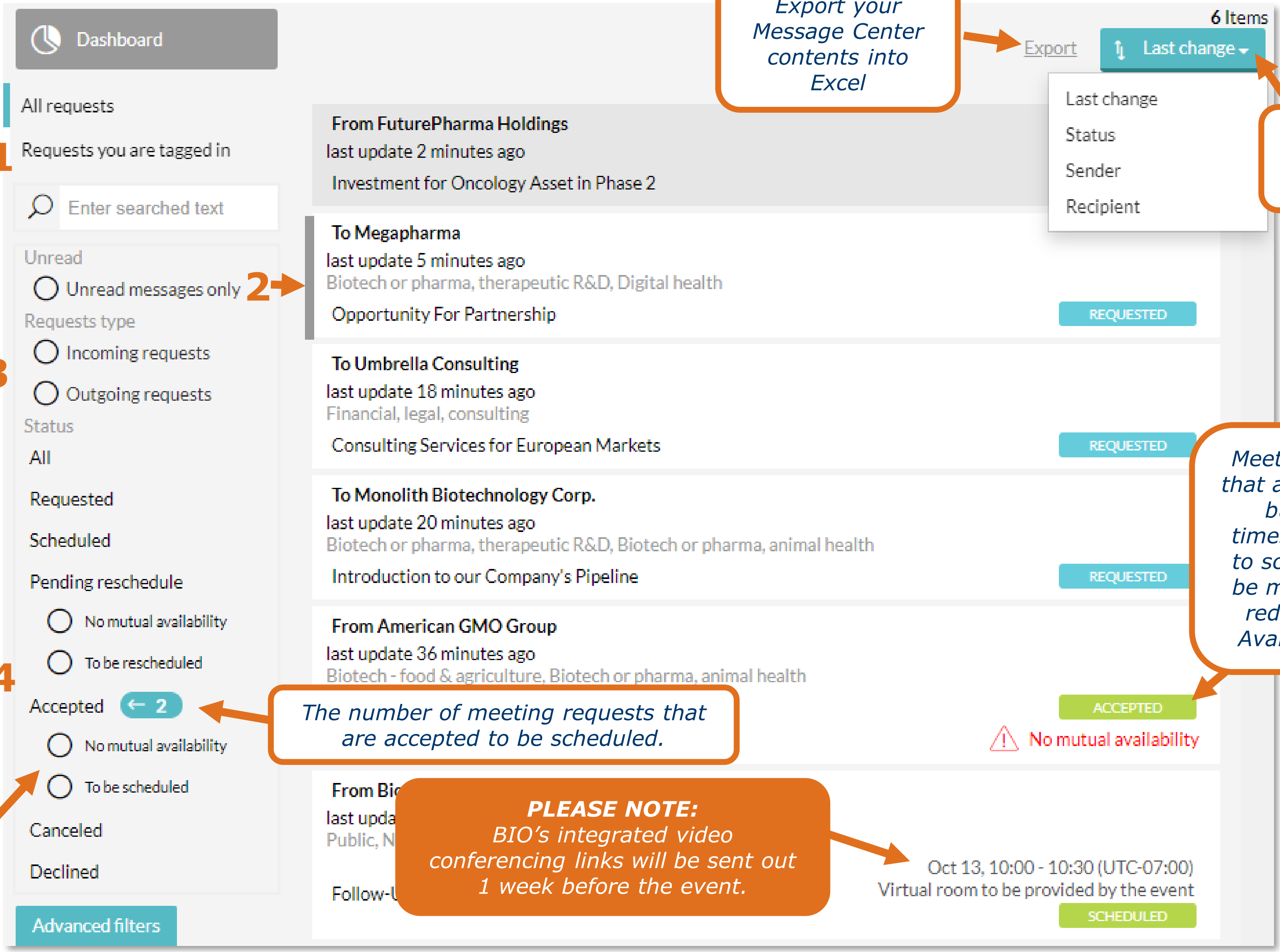
PLEASE NOTE: *Only members of your company can see these notes and meetings.*

Message Center

PLEASE NOTE: *The Message Center is set up at a company level. The same content will be displayed for all members of your company attending the conference.*

Filter by…

1. **Personal Tag**
2. **Unread Messages**
3. **Incoming & Outgoing**
4. **Meeting Status**



Export your Message Center contents into Excel

Sort by date, status, sender, or recipient

Meeting Requests that are "Accepted" but with no timeslot available to schedule it will be marked with a red "No Mutual Availability" tag.

The number of meeting requests that are accepted to be scheduled.

Refine and combine multiple filters

PLEASE NOTE:
BIO's integrated video conferencing links will be sent out 1 week before the event.

Sending Meeting Requests

1. Click **New Request** at the top of the page, or the envelope in your search results

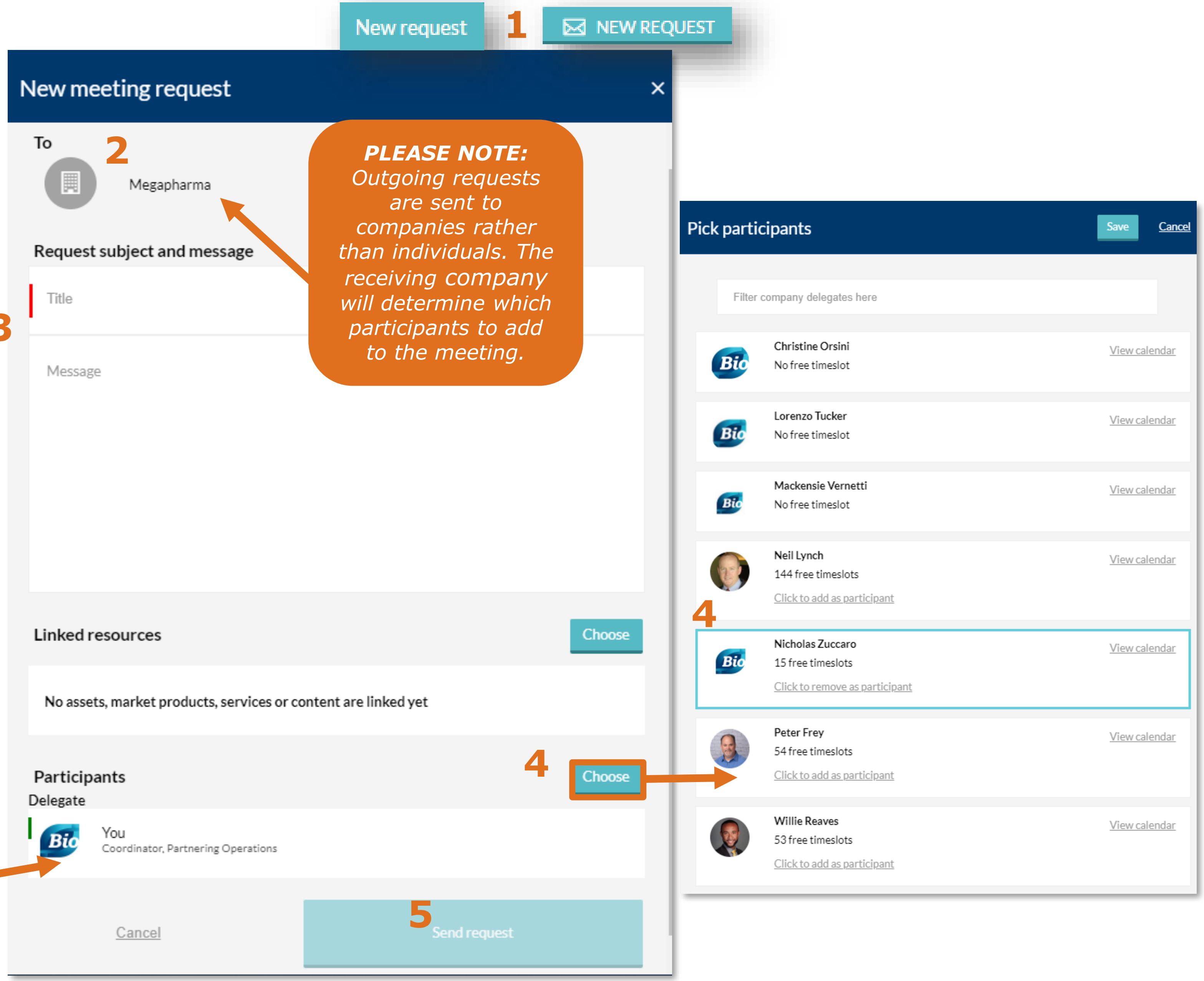
2. Type in the name of the company you'd like to meet with in the **To** field

3. Add a tailored subject and message in the **Title** and **Message** fields

4. Update meeting participants and availability, if necessary

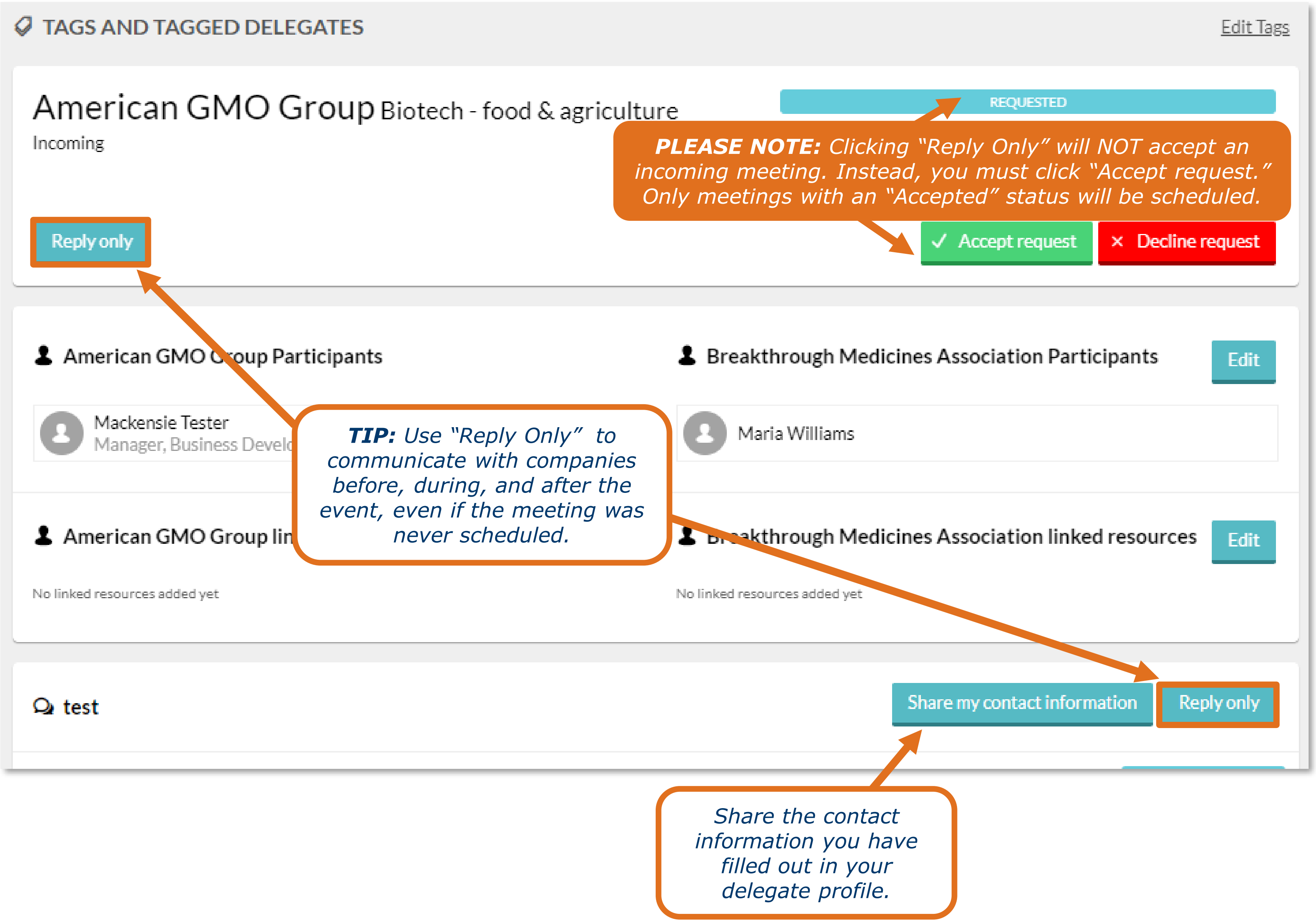
5. Click **Send Request**

PLEASE NOTE: *The default participant will be you. Don't forget to replace yourself with another participant if you do not intend to attend the meeting, or add additional participants as necessary.*



"Reply Only" to Meeting Requests

- Click **Reply Only** to create or a continue a conversation in an existing meeting request
- This will allow you to add an additional comment or question, or respond to the thread *without* changing the request's status
- This is useful if you would like more information before accepting a request, or if you would like to follow up with additional details



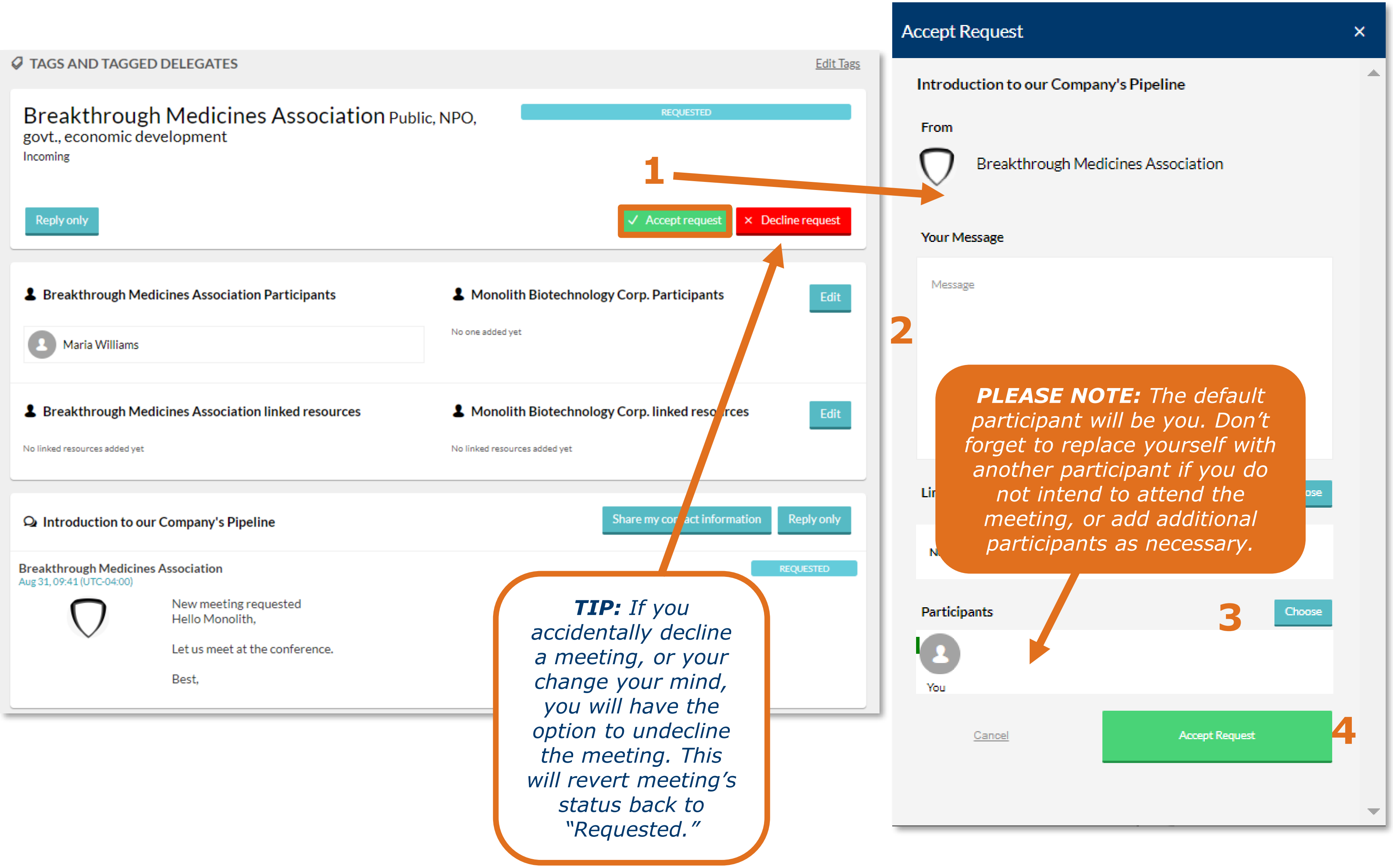
Accepting, Declining, & Canceling Meeting Requests

Accept

1. Click **Accept Request**
2. Include an explanation in the **Messages** field (optional)
3. Update meeting participants and availability, if necessary
4. Click **Accept Request**

Decline (not pictured)

1. Click **Decline Request**
2. Include an explanation in the **Messages** field (optional)
3. Click **Decline Request**



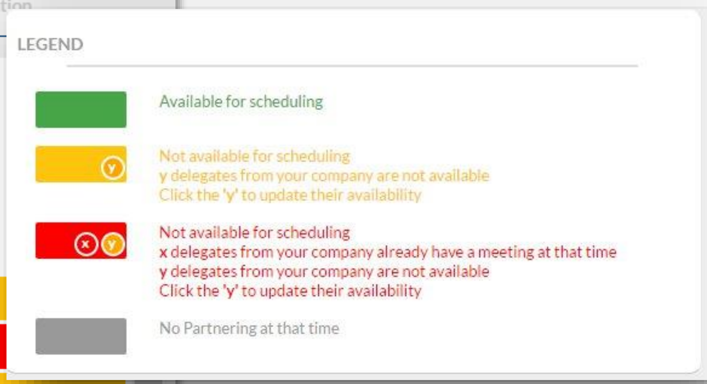
Scheduling A Meeting Request

Schedule

1. Once a meeting has been accepted, either company can select the schedule button.

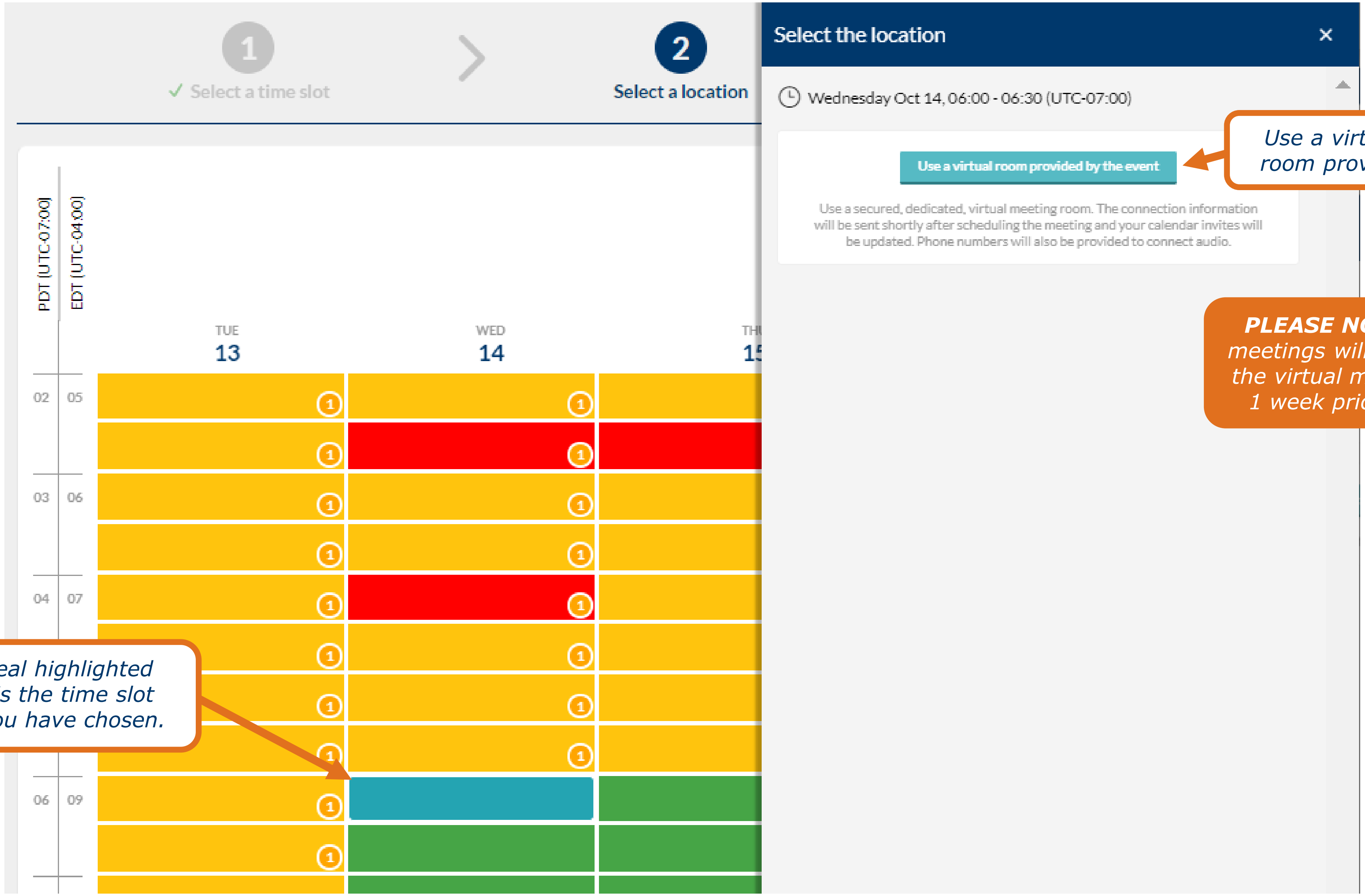
2. Within the scheduling window, you will encounter all available timeslots. Green timeslots are mutually available. Opening more timeslots increases the chances of having mutual availability to schedule your meeting.

3. If you would like to change your availability without returning to the calendar page, click Edit Participants on the left hand side of the scheduling screen. This will bring up a list of your company's delegates.



PLEASE NOTE:
The system will display the calendar in two time zones: the time zone of the conference and the detected time zone of your browser.

Scheduling A Meeting Request



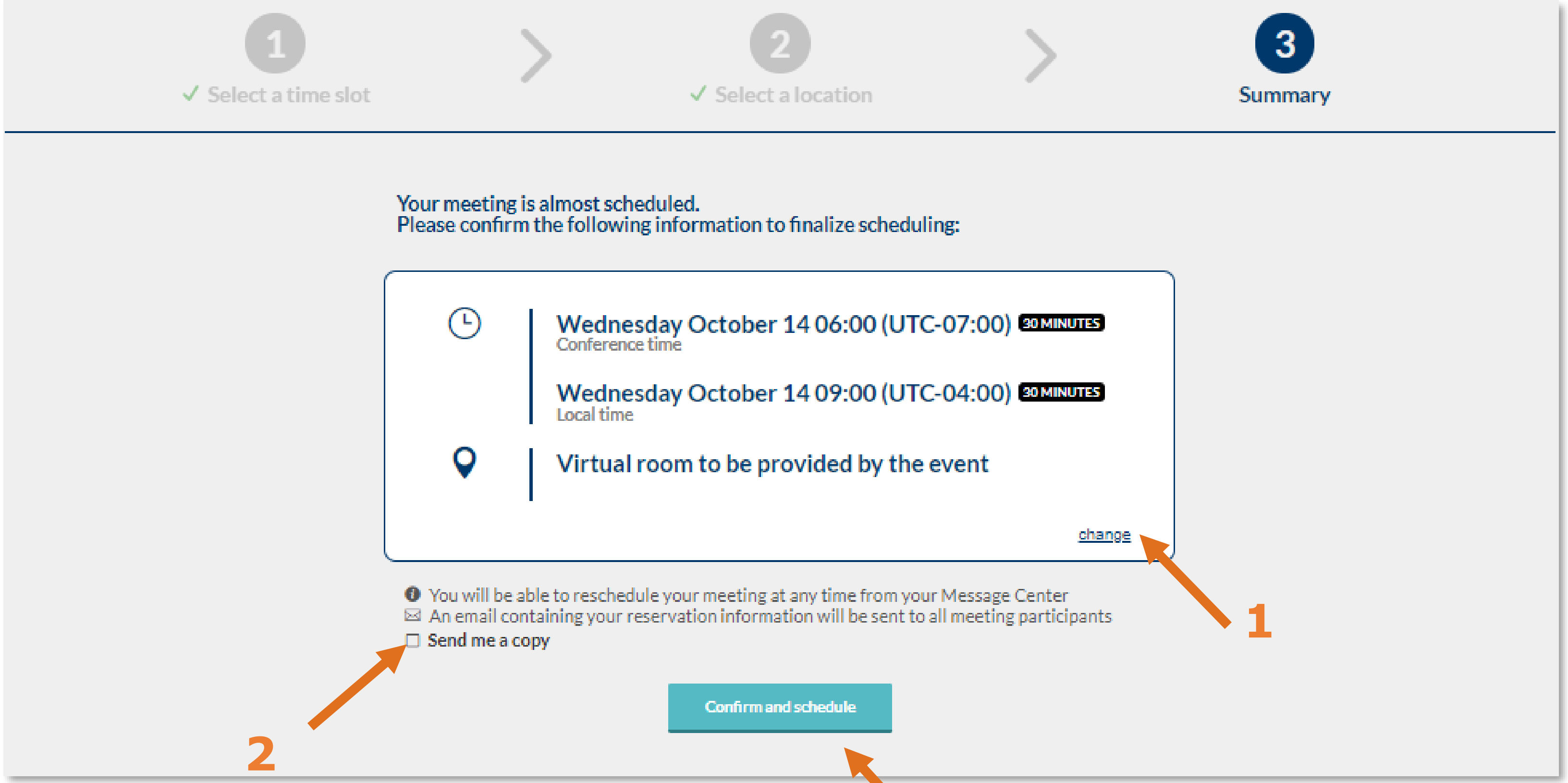
Use a virtual meeting room provided by BIO

***PLEASE NOTE:** Scheduled meetings will be updated with the virtual meeting room link 1 week prior to the event.*

The teal highlighted area is the time slot that you have chosen.

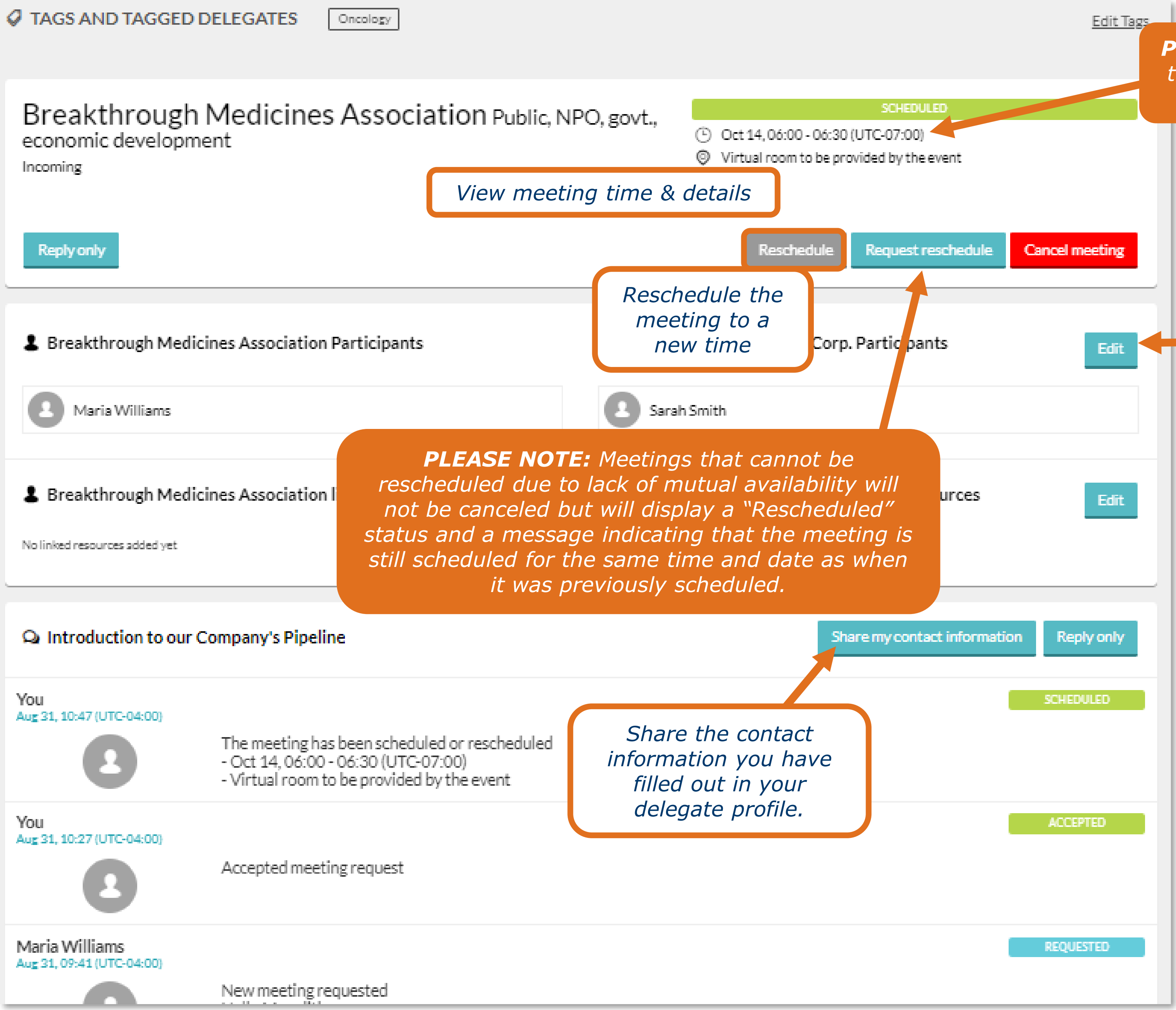
Summary of the Meeting

- After you have selected to use a virtual room provided by BIO, you will be brought to the “Summary” page to review and confirm your meeting.
- Click “Change**”** (**1**) to go back to the previous screen to edit any of the meeting details.
- If you are scheduling a meeting for another delegate within your company, you can click the box next to “Send me a copy” (**2**) to also receive the reservation information to your email on file.
- All attending delegates will automatically receive an email containing the reservation details.
- After reviewing the information, click **Confirm and schedule** to finalize the information. Details can be updated in Message Center



PLEASE NOTE:
After selecting to confirm and schedule, the meeting will show up on all of the meeting delegates’ calendars within the BIO One-On-One Partnering™ system

Updating Meetings



PLEASE NOTE: *The displayed time will be in the same time zone as the conference.*

View meeting time & details

Reschedule the meeting to a new time

Update meeting participants

PLEASE NOTE: *Meetings that cannot be rescheduled due to lack of mutual availability will not be canceled but will display a "Rescheduled" status and a message indicating that the meeting is still scheduled for the same time and date as when it was previously scheduled.*

Scheduled meetings will be updated with the virtual meeting room link 1 week prior to the event

Share the contact information you have filled out in your delegate profile.

Contact Information

Email: BIOpartnering@bio.org

Phone: +866.356.5155 (U.S.)

+1.202.962.6666 (International)

@bio1x1

Customer Service: Monday–Friday, 9 AM-5 PM ET