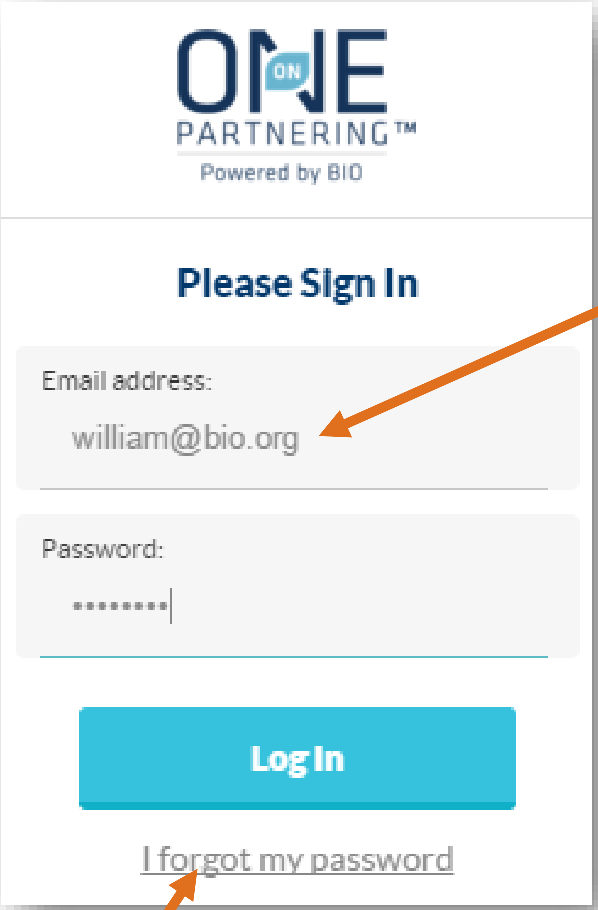
The One-on-One Partnering™ System Tutorial

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

Logging In

- Typically, you will receive an email confirmation with login instructions from BIO Partnering within **1-2 business days after registering** for the event.
- If you used BIO's 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 One-on-One Partnering, you will need to set your password using the link provided in the email.

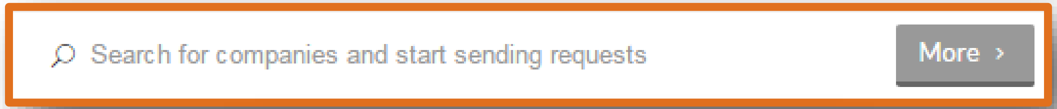


PLEASE NOTE:
Access to partnering requires that delegates use a company email address with their name attached to it. Generic (e.g. info@company.com, personal (e.g. Gmail/Hotmail) and executive assistant email addresses do not qualify.

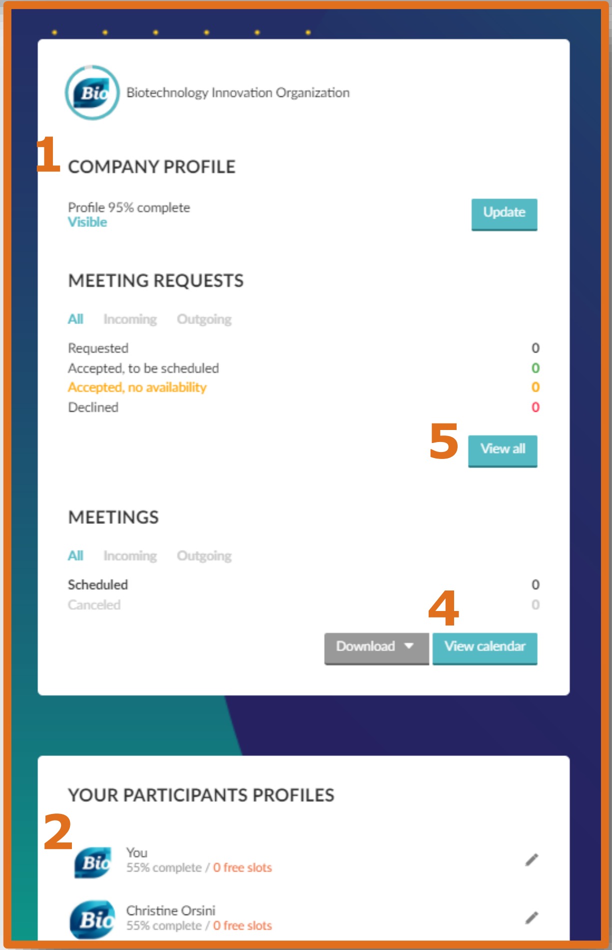
Click here to reset your password

Home Page

Return Home



Log out/Reset Password
Access Delegate Profile



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

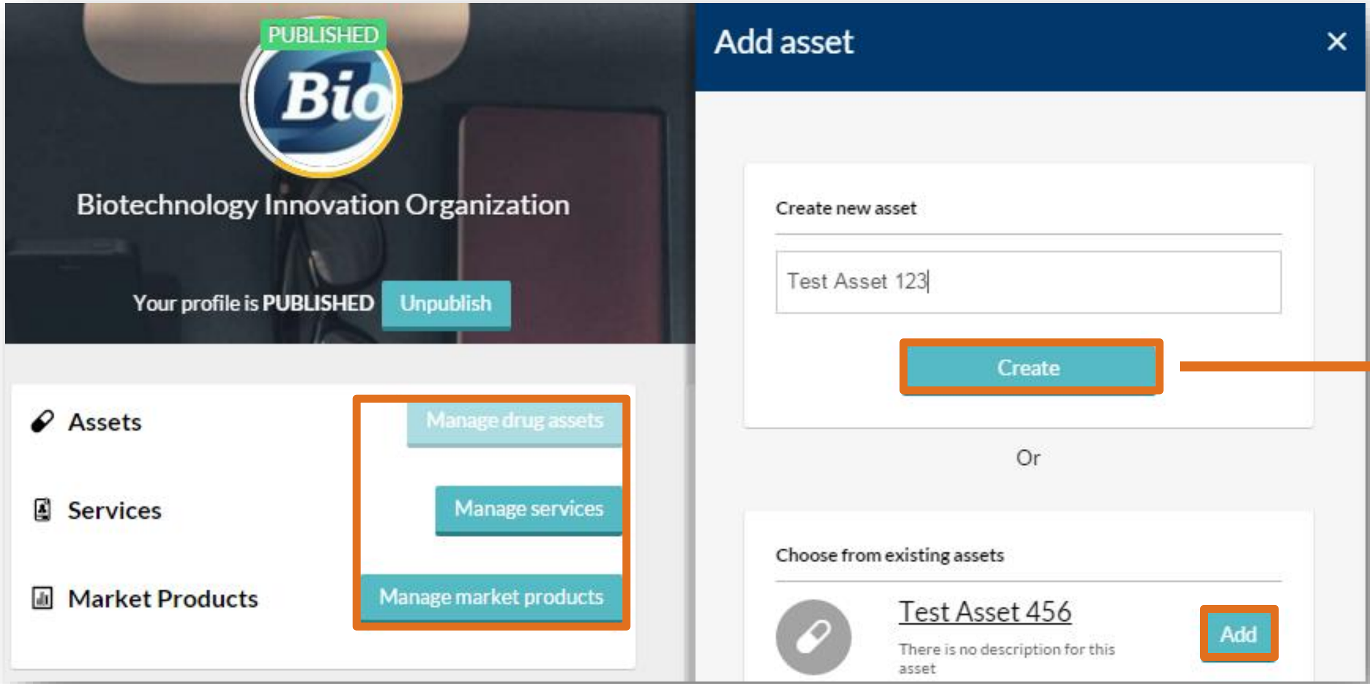
6 Bookmarks
View bookmarked companies, delegates, assets, products, and services

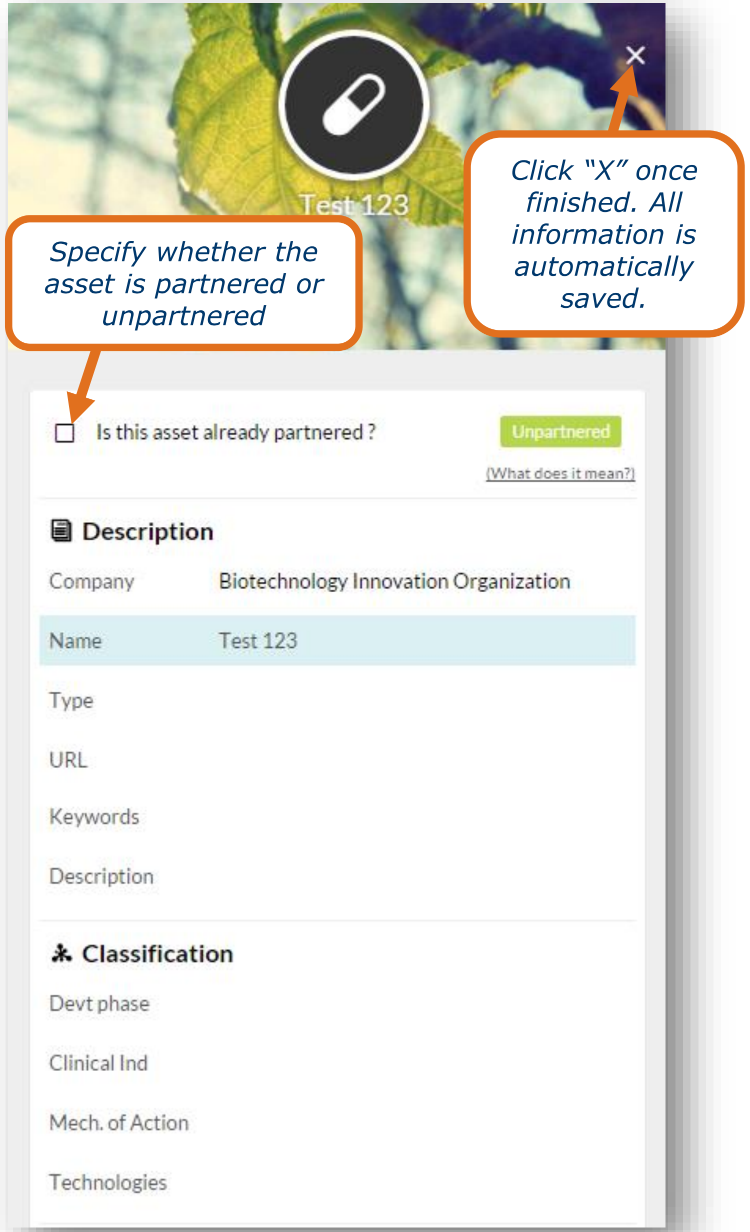
Company Profile

- ✓ 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 to the "Content" section at the bottom right

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

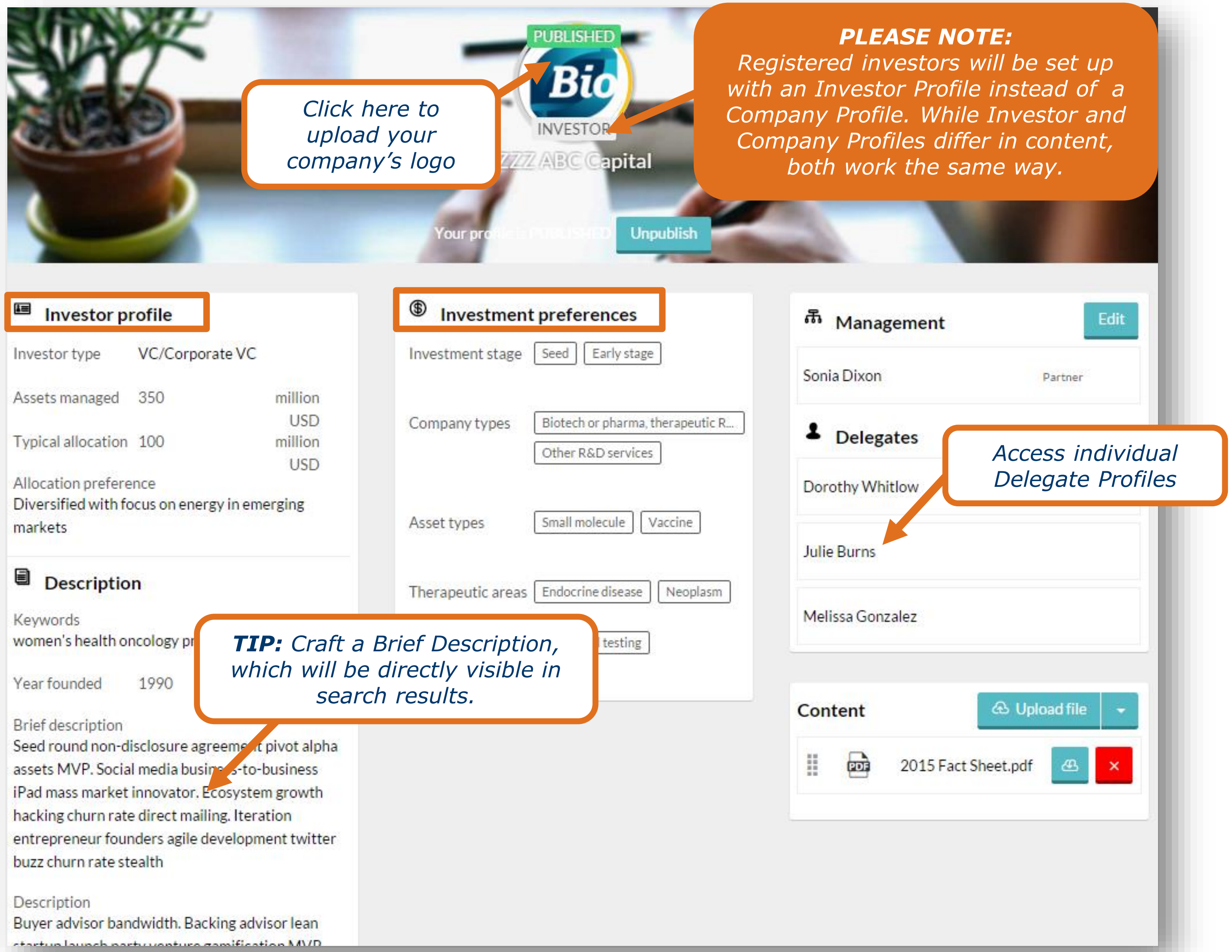




Investor Profile

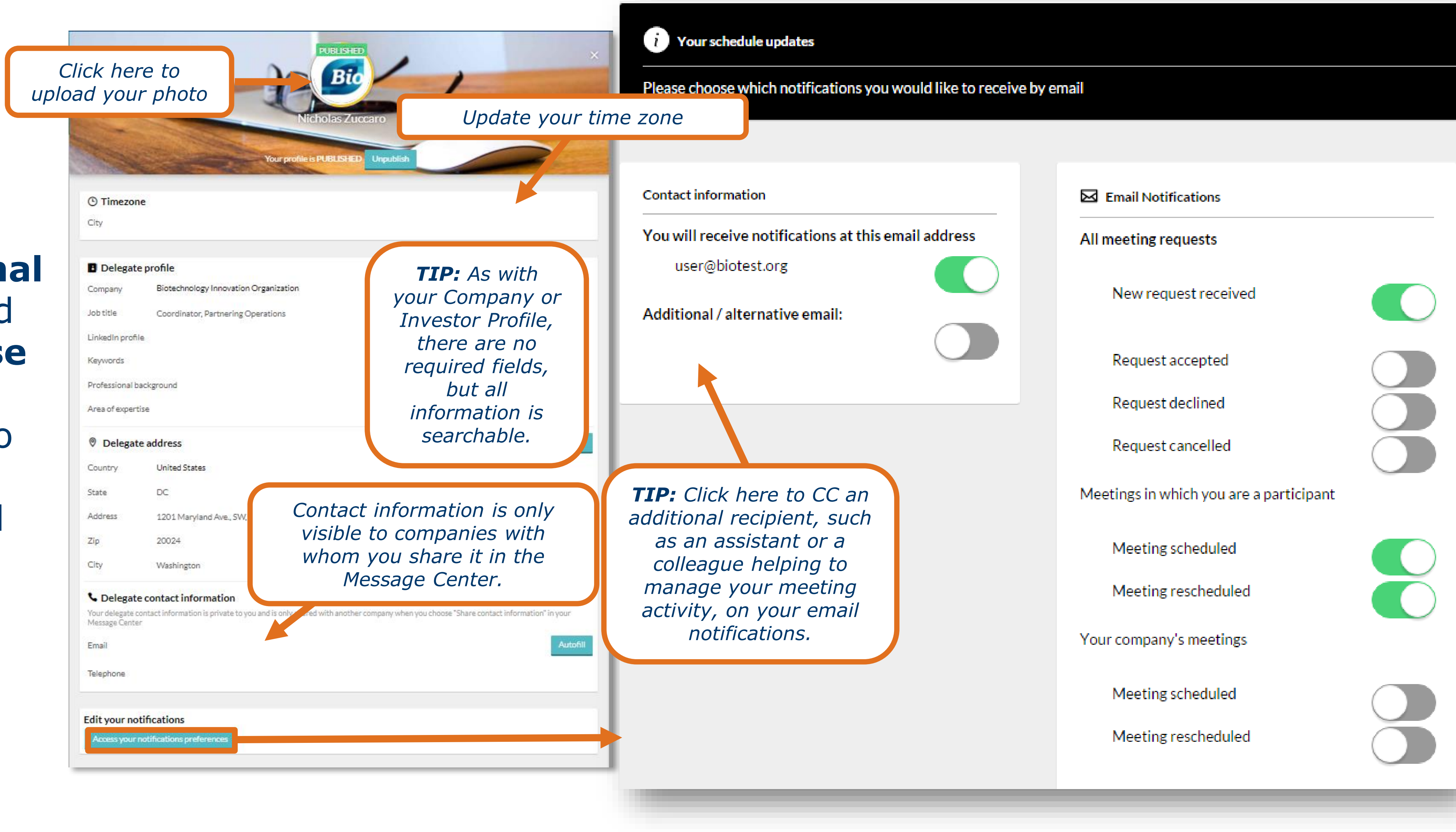
PLEASE NOTE:
Your profile is published by default. Click "Unpublish" to temporarily unpublish it and keep it hidden in search results.

- ✓ 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 to the "Content" section at the bottom right



Delegate Profile & Notification Preferences

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

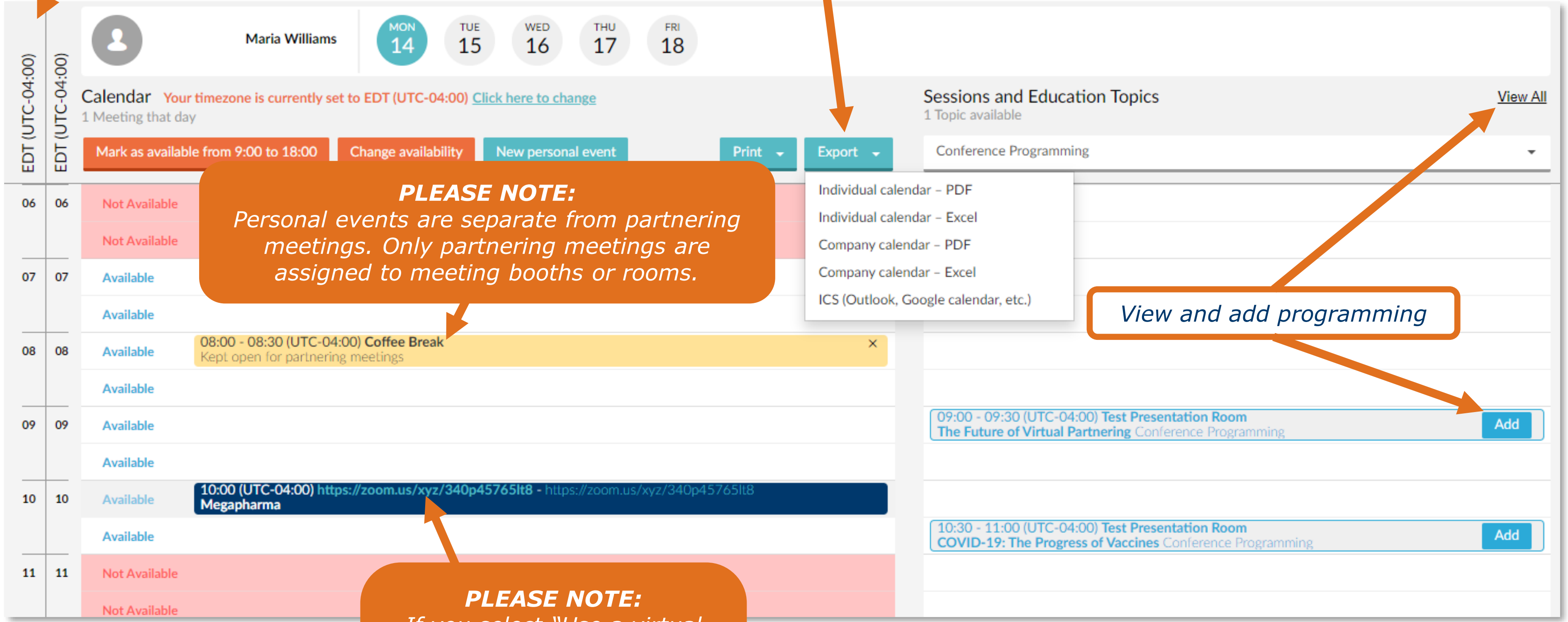


Calendar

- ✓ 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

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

Export your individual or entire company schedule



PLEASE NOTE:
Personal events are separate from partnering meetings. Only partnering meetings are assigned to meeting booths or rooms.

View and add programming

PLEASE NOTE:
If you select "Use a virtual room provided by the event" when scheduling, the meeting will be assigned a meeting link by BIO as soon as it is scheduled.

Updating Calendar Availability

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

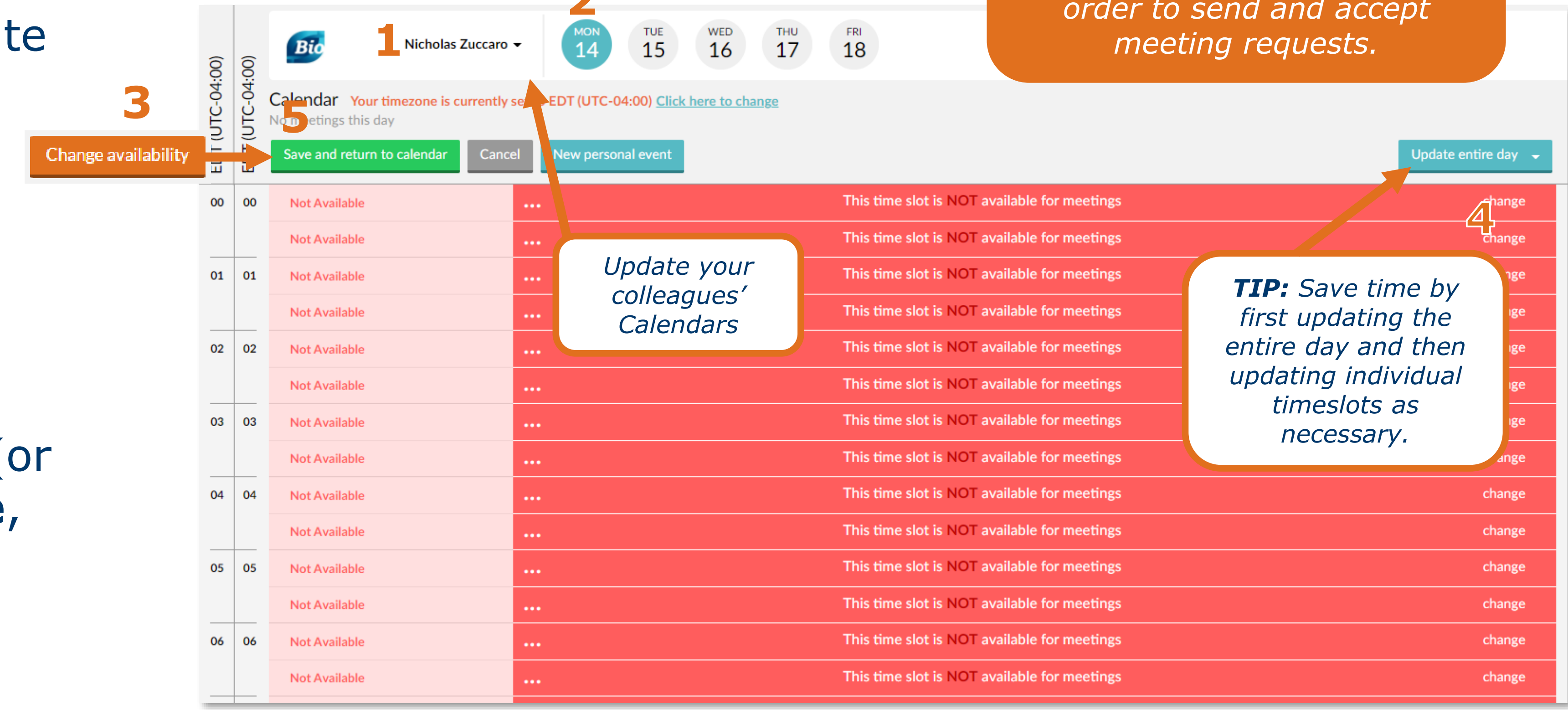
2. Select the correct day of the week

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**

__PLEASE NOTE:__ Your Calendar is completely unavailable by default. You must have at least one available timeslot in order to send and accept meeting requests.



Update your colleagues' Calendars

__TIP:__ Save time by first updating the entire day and then updating individual timeslots as necessary.

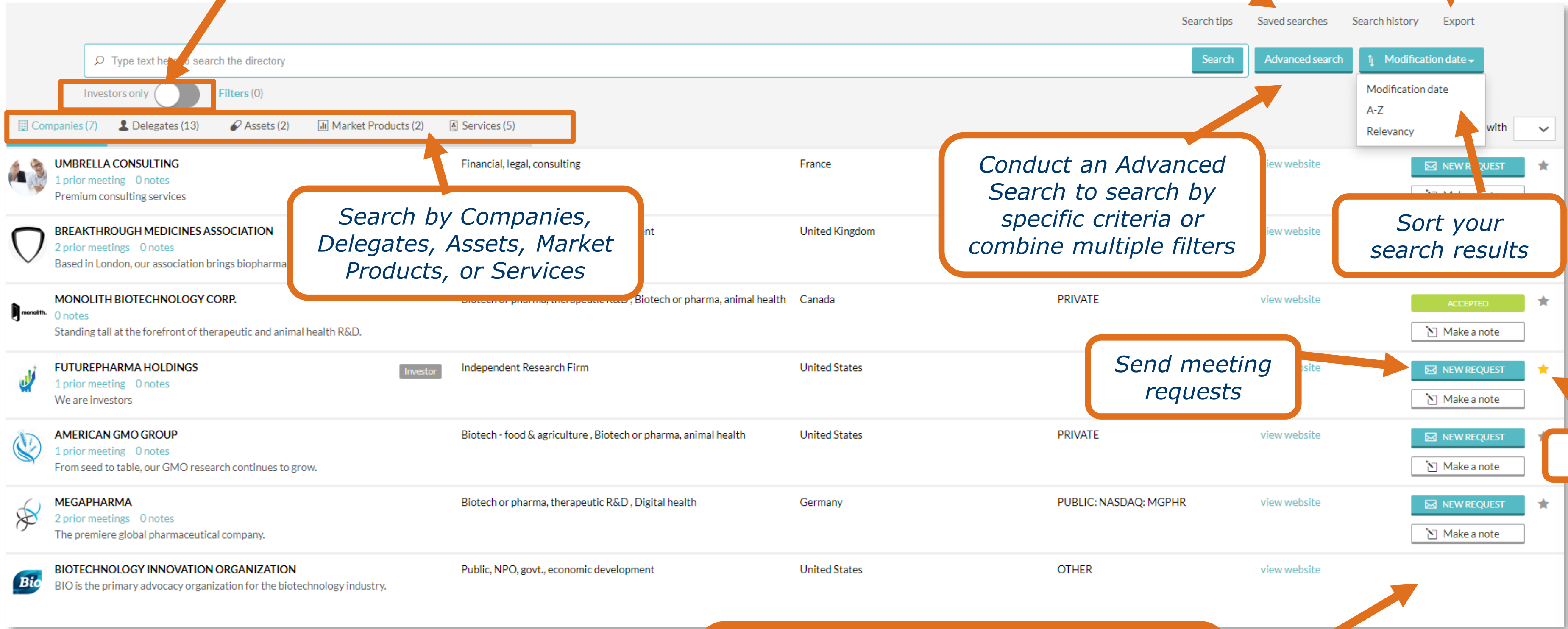
__TIP:__ You can select to open your calendar from 9 AM to 6 PM in your local time zone by clicking this button at the top of the calendar page.

Search & Advanced Search

Search by investors only

Save specific search criteria and monitor results

Export your specific search results into Excel



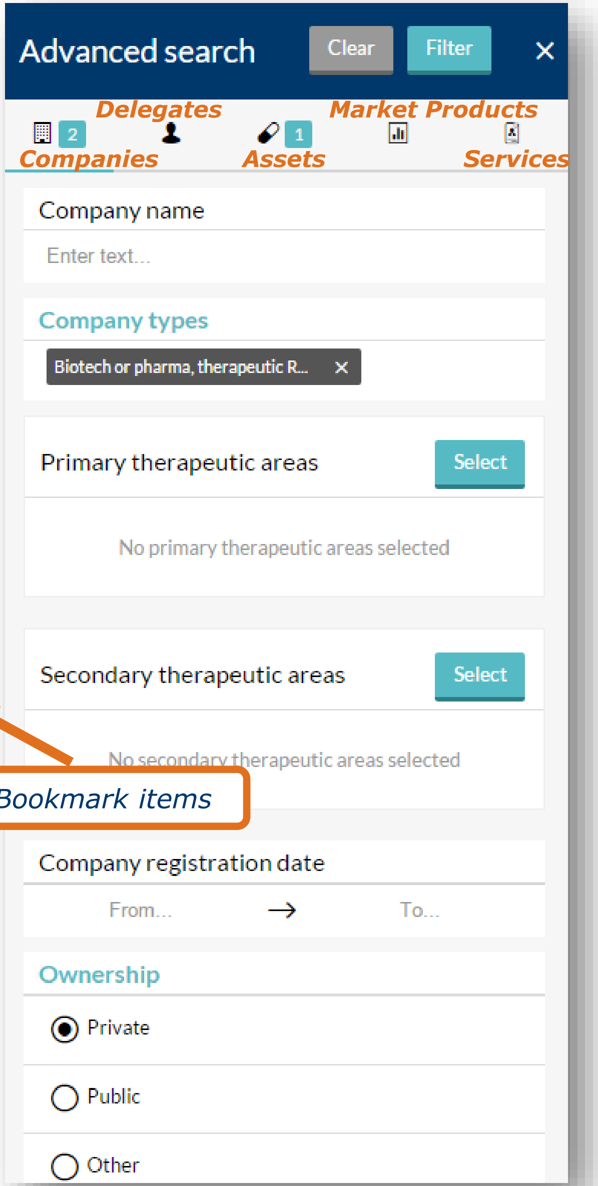
Search by Companies, Delegates, Assets, Market Products, or Services

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

Sort your search results

Send meeting requests

Bookmark items



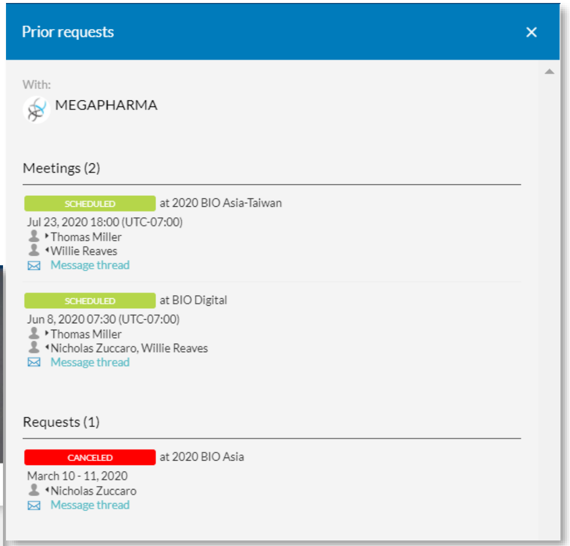
***PLEASE NOTE:** When viewing your own company in search results, you will not see "New Request" and Bookmark buttons. However, other companies will see these buttons next to your company.*

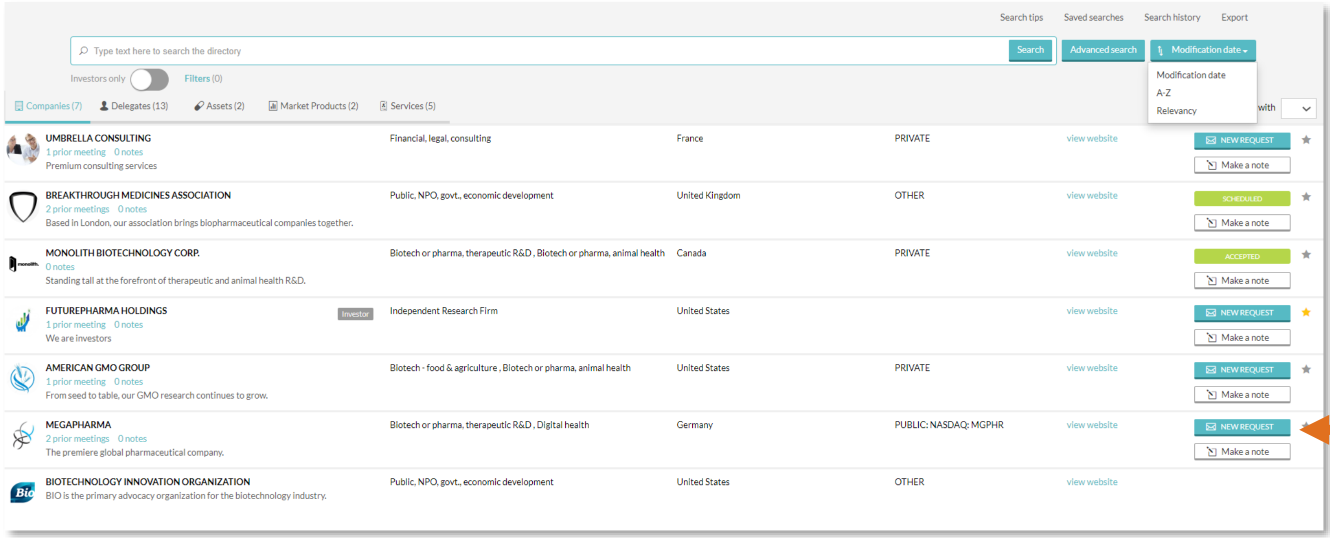
Collaboration Features

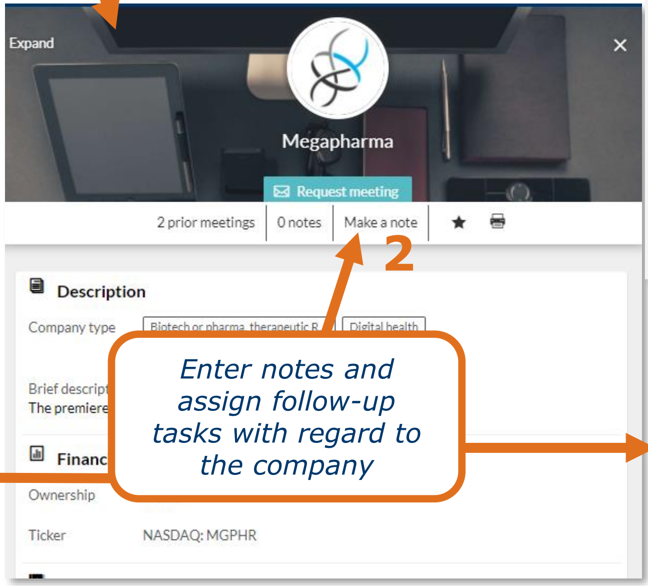
1. **Prior Meetings**
2. **Notes**

1

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

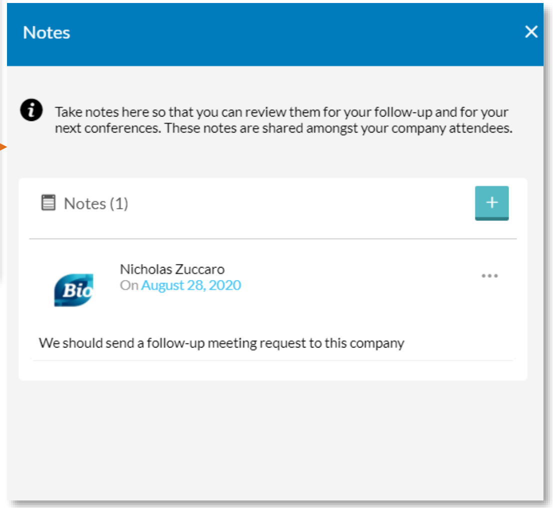






2

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



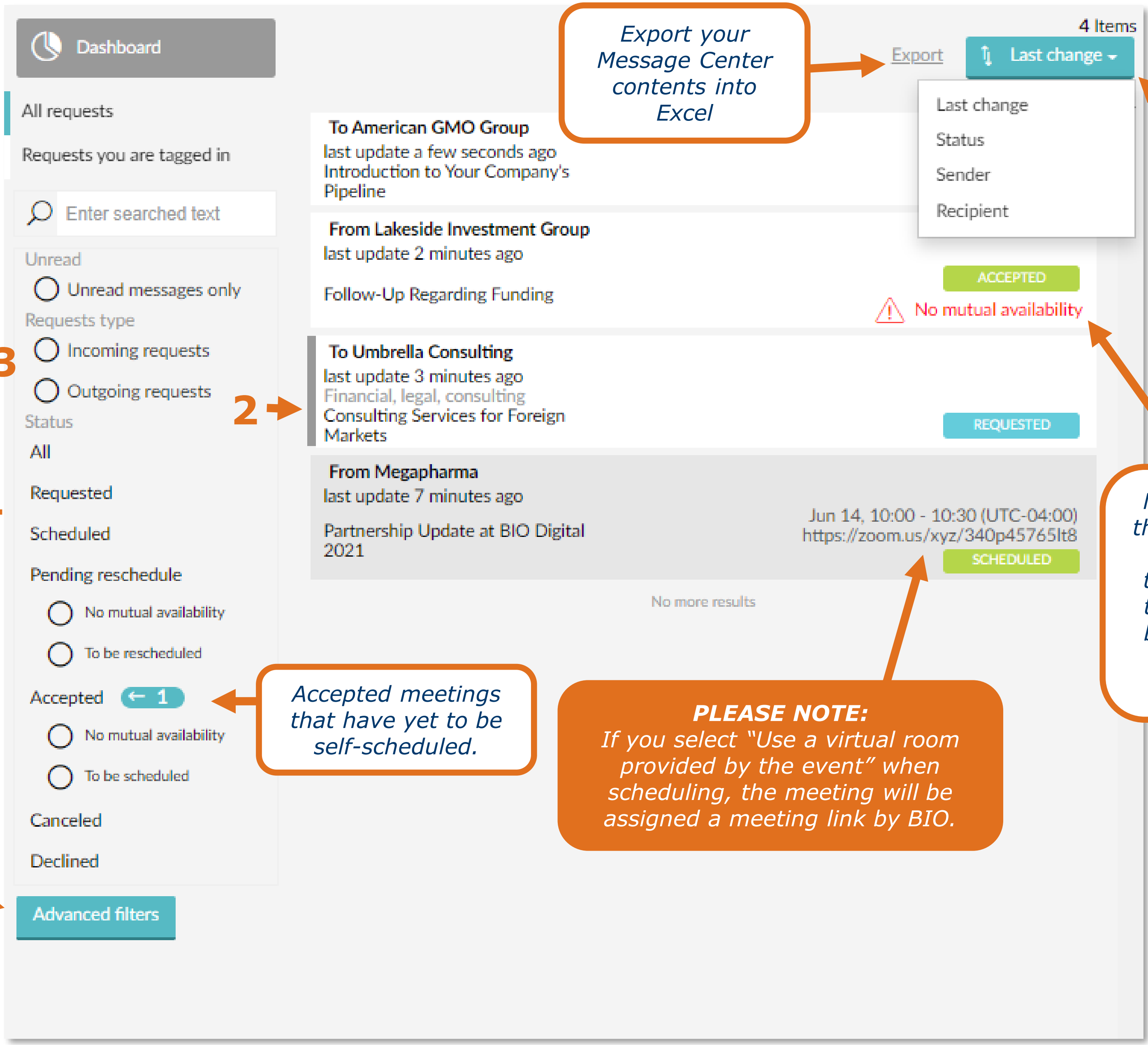
PLEASE NOTE: *Only members of your company can see these notes and meetings.*

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.

Accepted meetings that have yet to be self-scheduled.

PLEASE NOTE: *If you select "Use a virtual room provided by the event" when scheduling, the meeting will be assigned a meeting link by BIO.*

Refine and combine multiple filters

Sending Meeting Requests

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

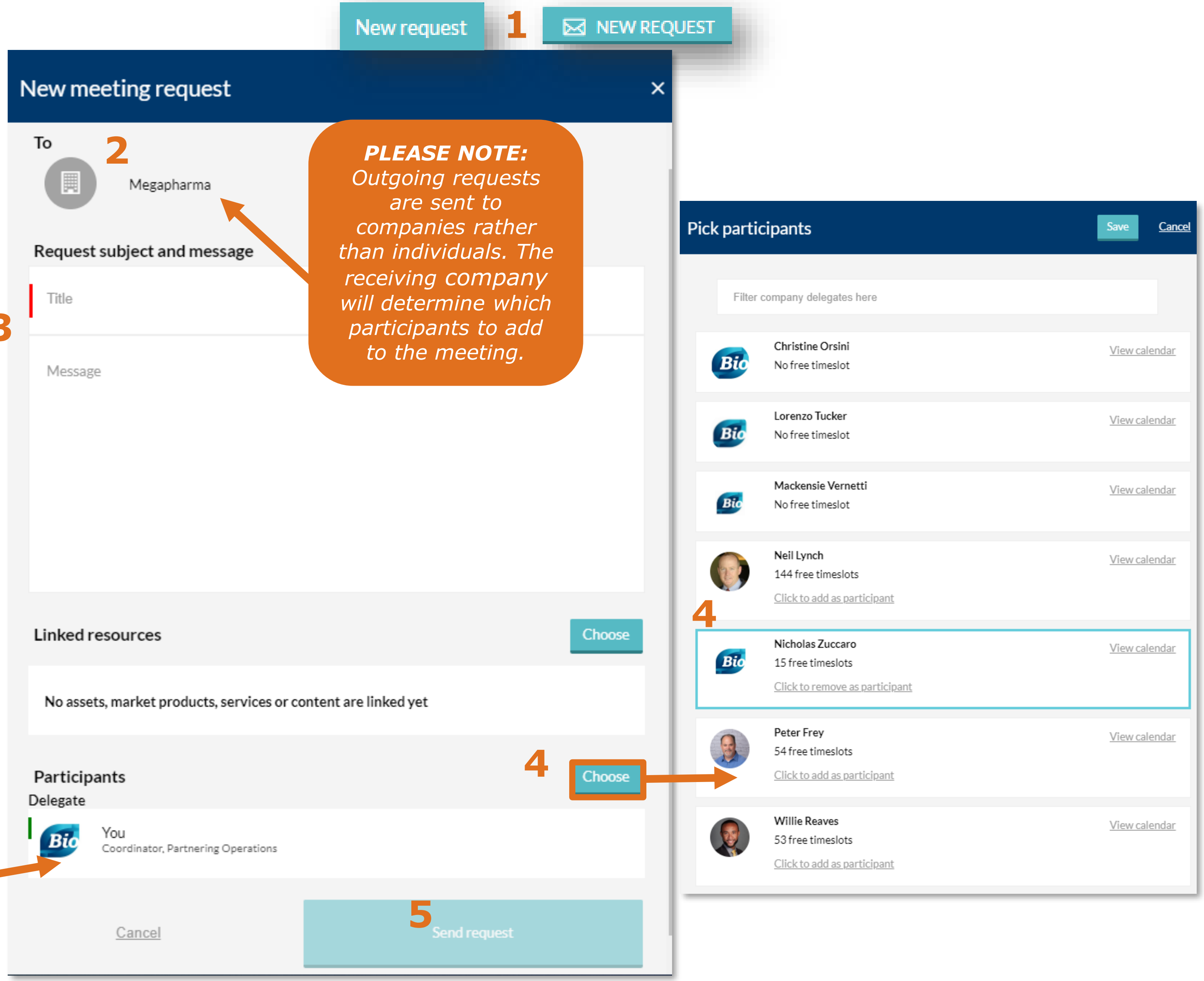
2. Type in the name of the company you'd like to meet with in the **To** field

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**

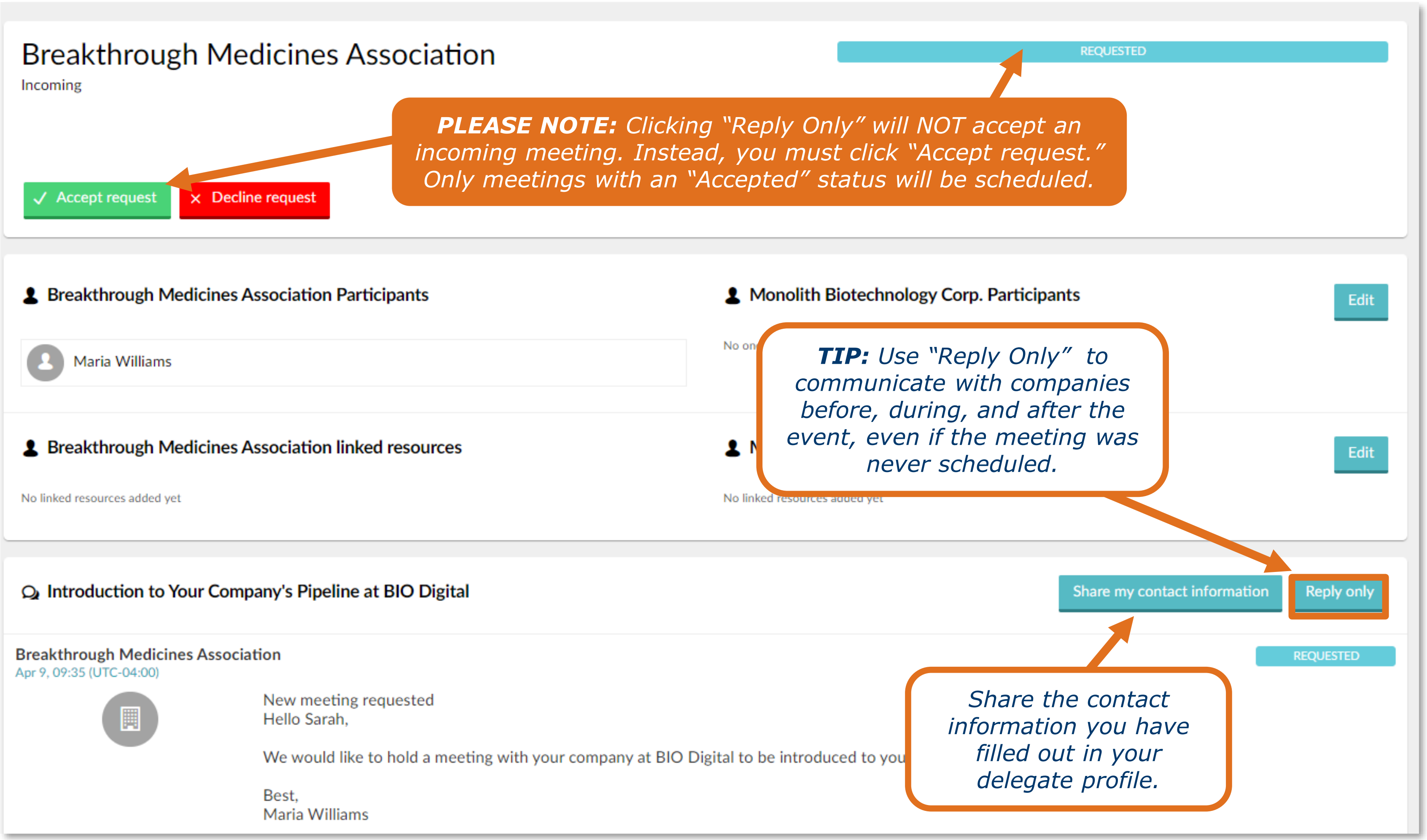
PLEASE NOTE: *The default participant will be you. Don't forget to replace yourself with another participant if you do not intend to attend the meeting, or add additional participants as necessary.*



PLEASE NOTE: *Outgoing requests are sent to companies rather than individuals. The receiving company will determine which participants to add to the meeting.*

"Reply Only" to Meeting Requests

- Click **Reply Only** to create or 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



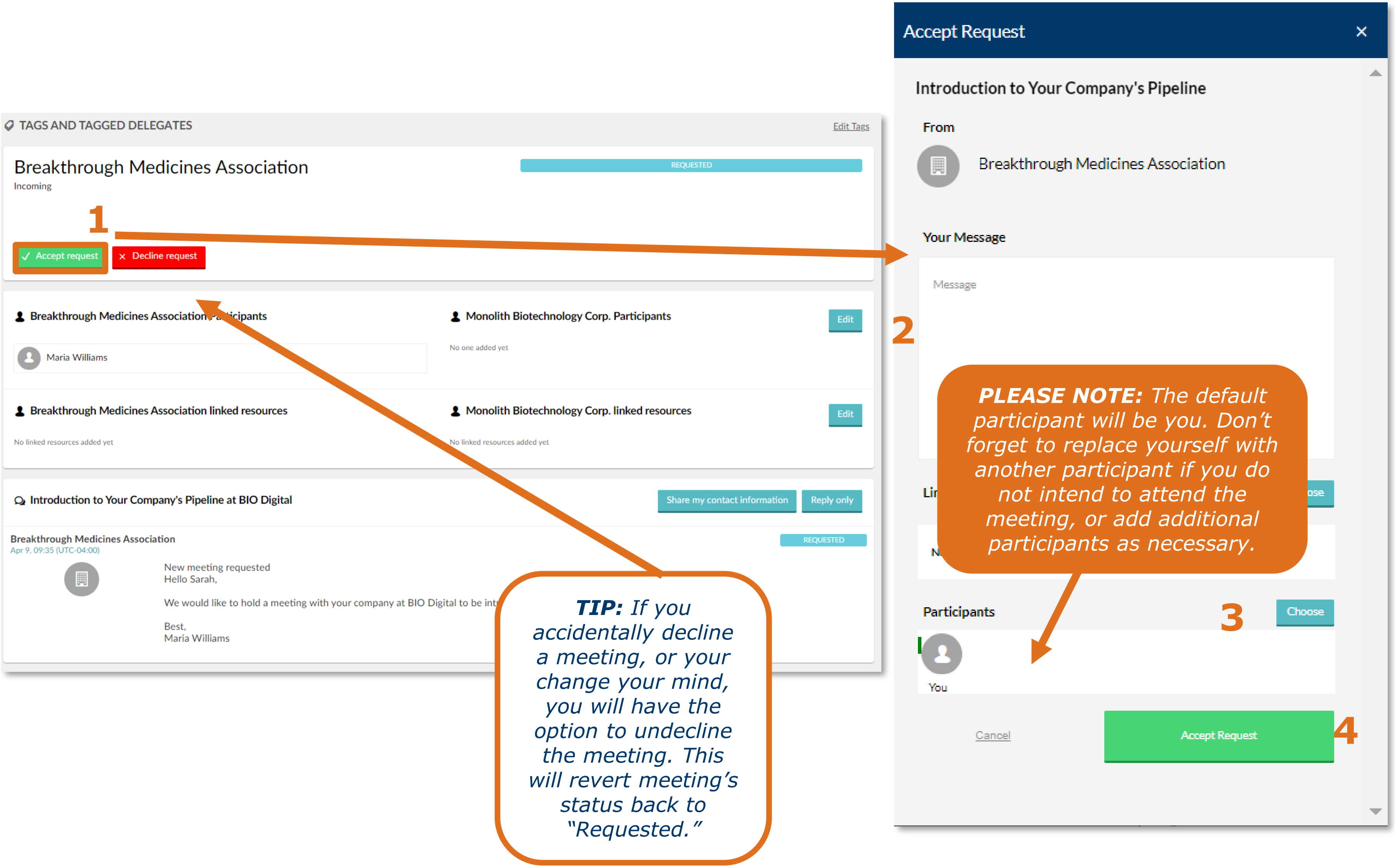
Accepting, Declining, & Canceling Meeting Requests

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)

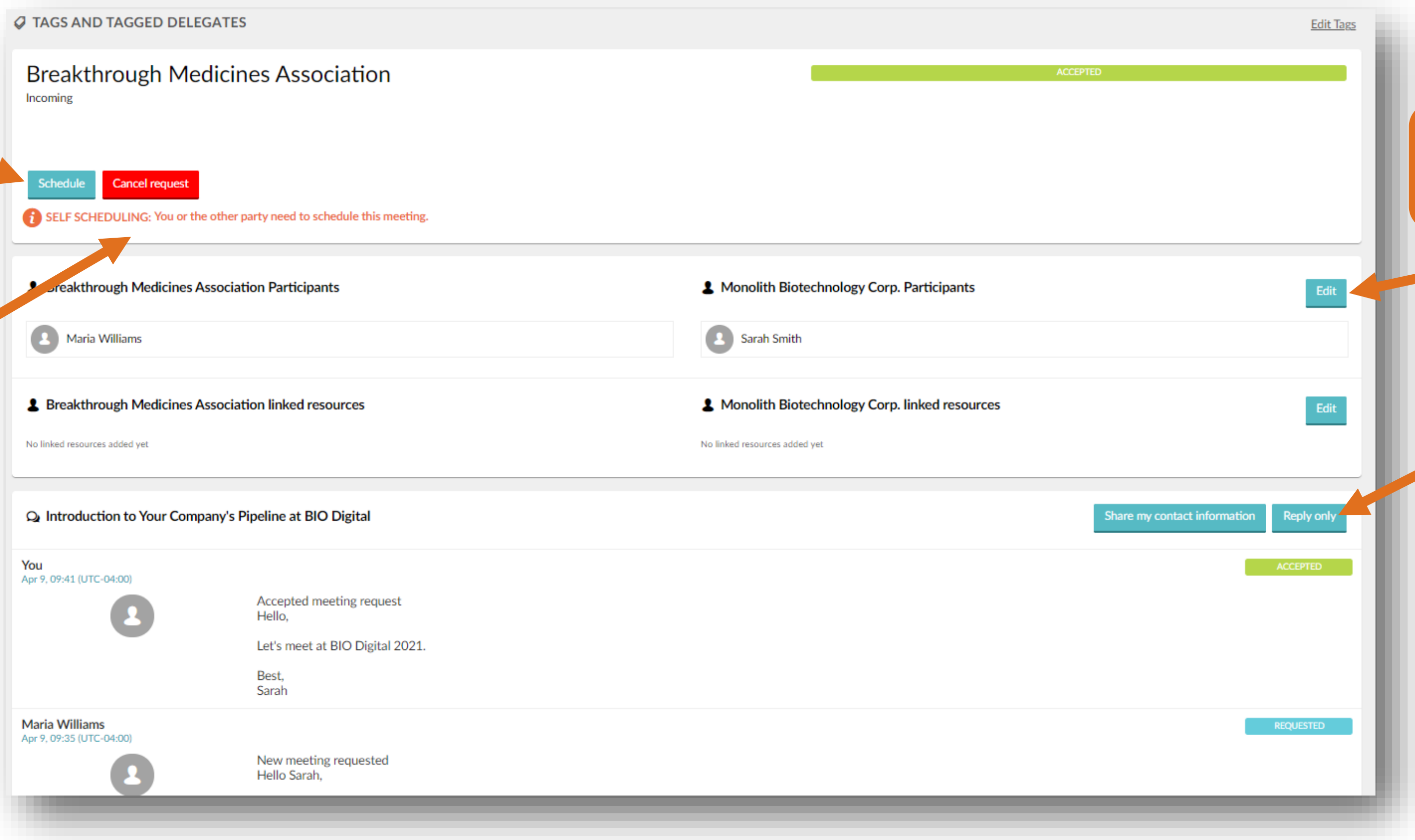
1. Click **Decline Request**
2. Include an explanation in the **Messages** field (optional)
3. Click **Decline Request**



Scheduling an Accepted Meeting Request

Select "Schedule" to display mutually available timeslots for this meeting

The system will let you know if you are viewing an accepted meeting that has not been scheduled.



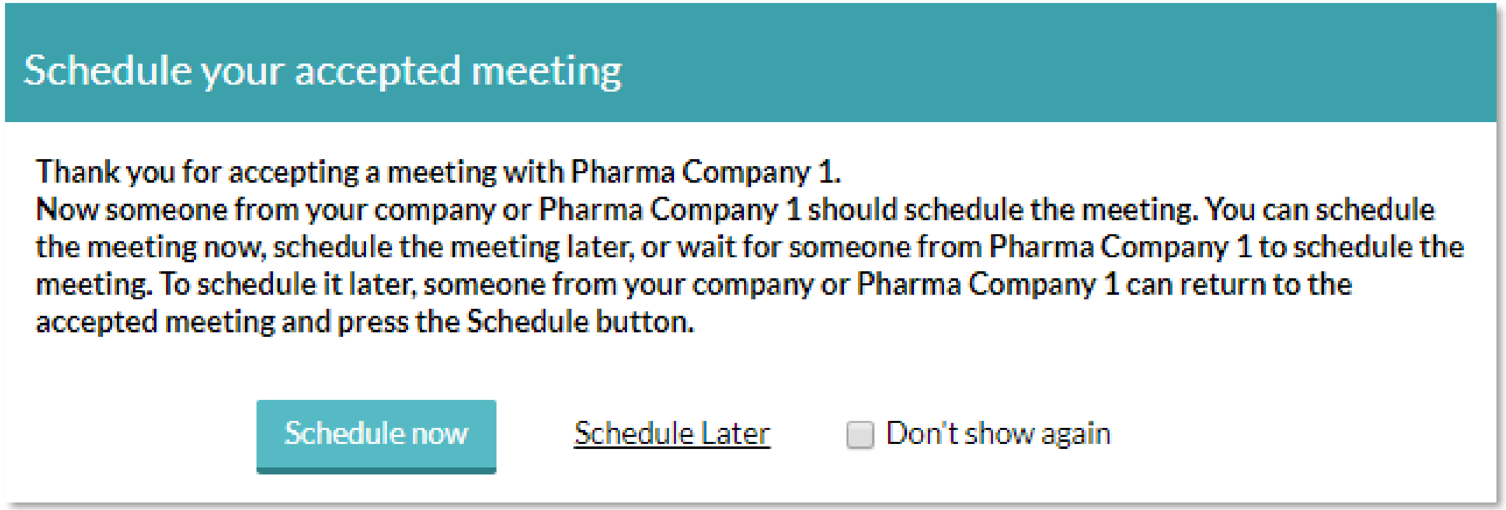
Add or remove participants from your company to this meeting

Message meeting participants in partnering system

PLEASE NOTE:
This is the panel window that is displayed on the right side of the page when selecting a meeting in the Message Center, seen on the previous slides.

Scheduling an Accepted Meeting Request

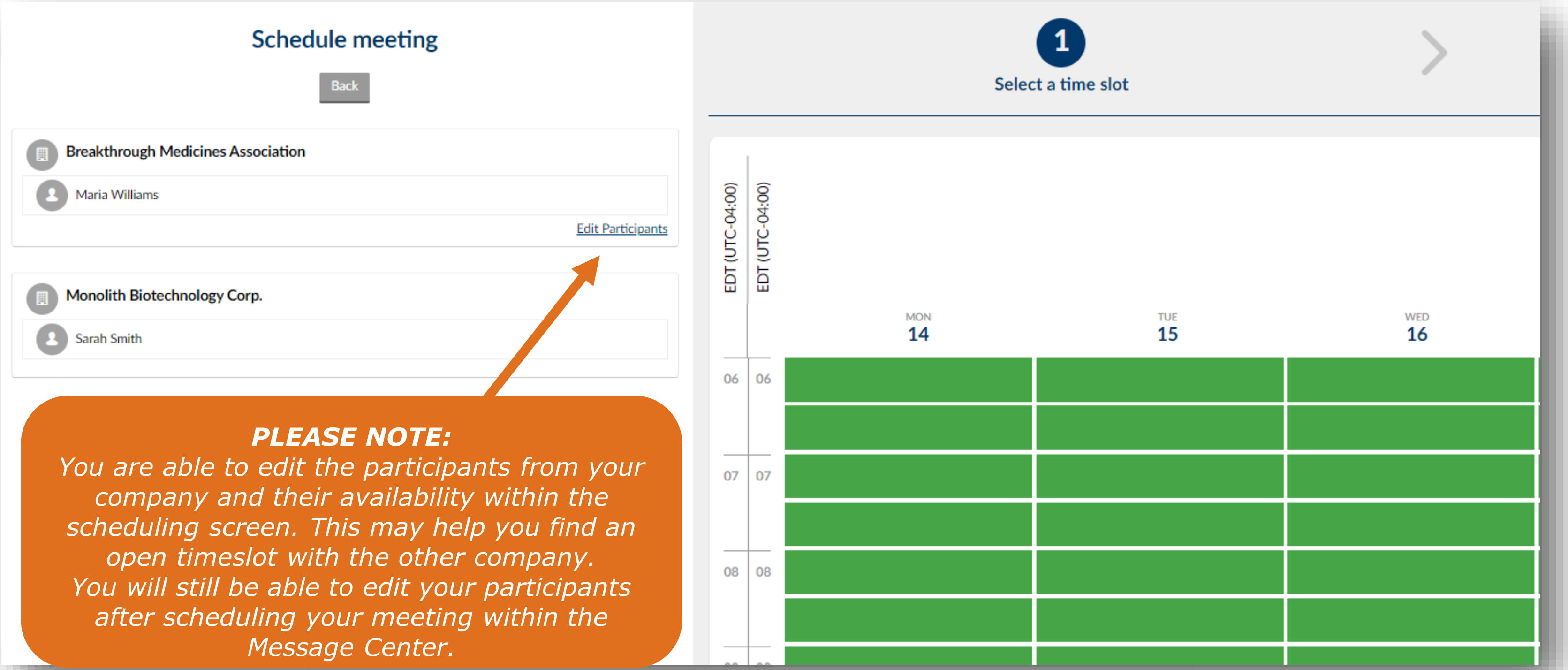
- If you accept an incoming meeting request, you will receive a popup in the **Message Center** asking if you would like to schedule the meeting now or later.

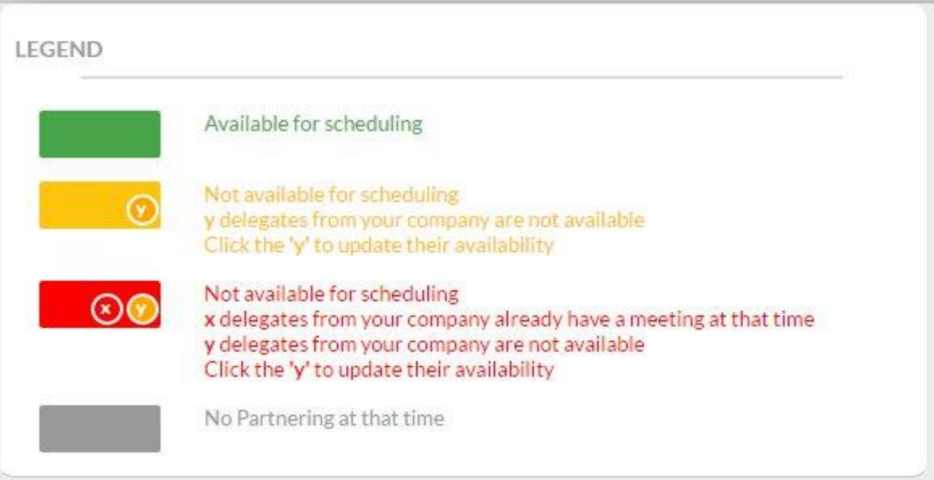


PLEASE NOTE:
If you select "Don't show again," but would like to receive this notification again when you accepted meetings, reset your notifications under "Notification Preferences".

Scheduling an Accepted Meeting Request

- Click on an available timeslot to bring up your choices for the meeting location
- All mutually available timeslots will be green.
- The scheduling screen shows you all partnering timeslots, each with the appropriate indicator based on the availability of the meeting participants.
- Opening more timeslots increases the chances of having mutual availability to schedule your meeting.



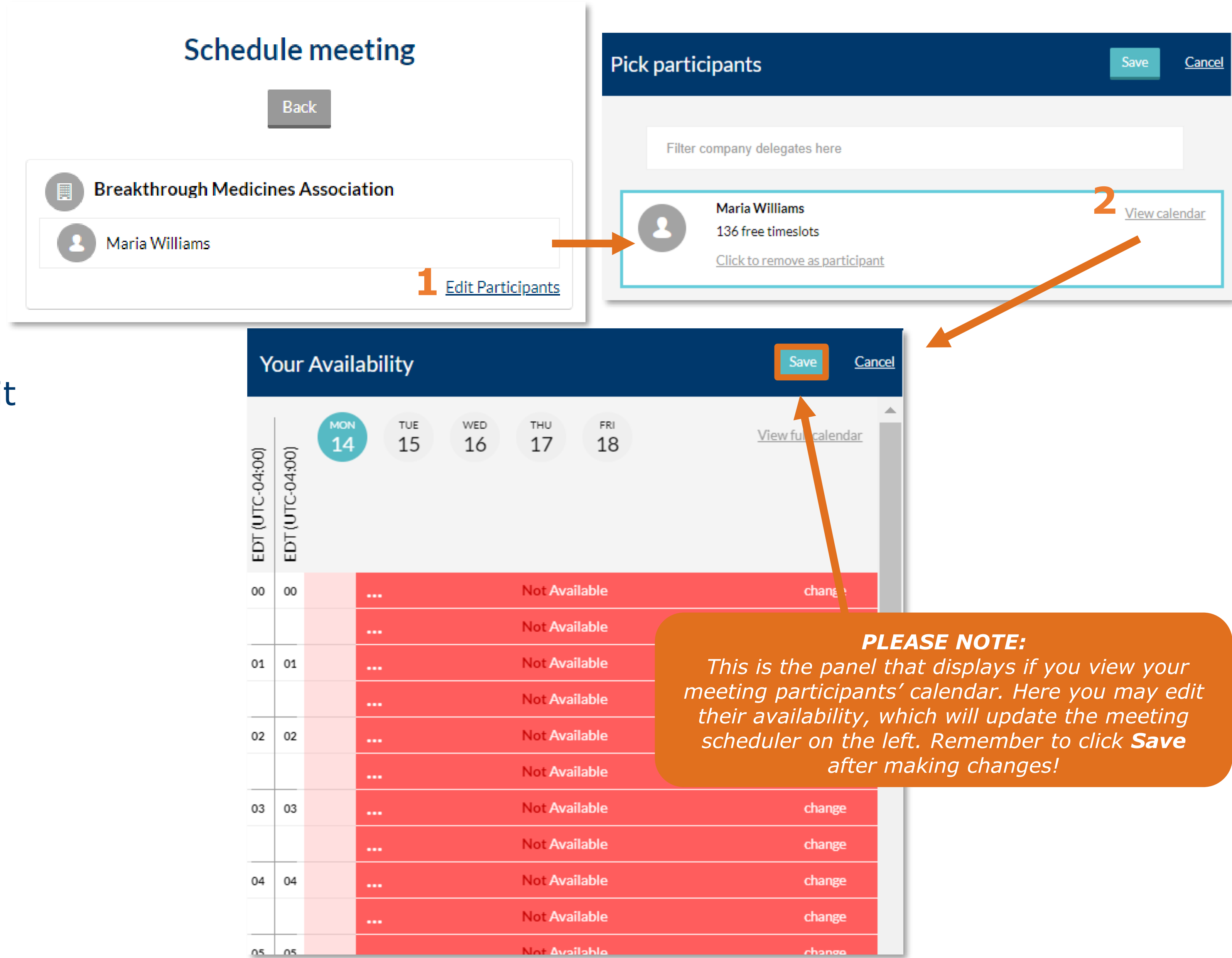


Changing Availability While Scheduling

Changing Availability

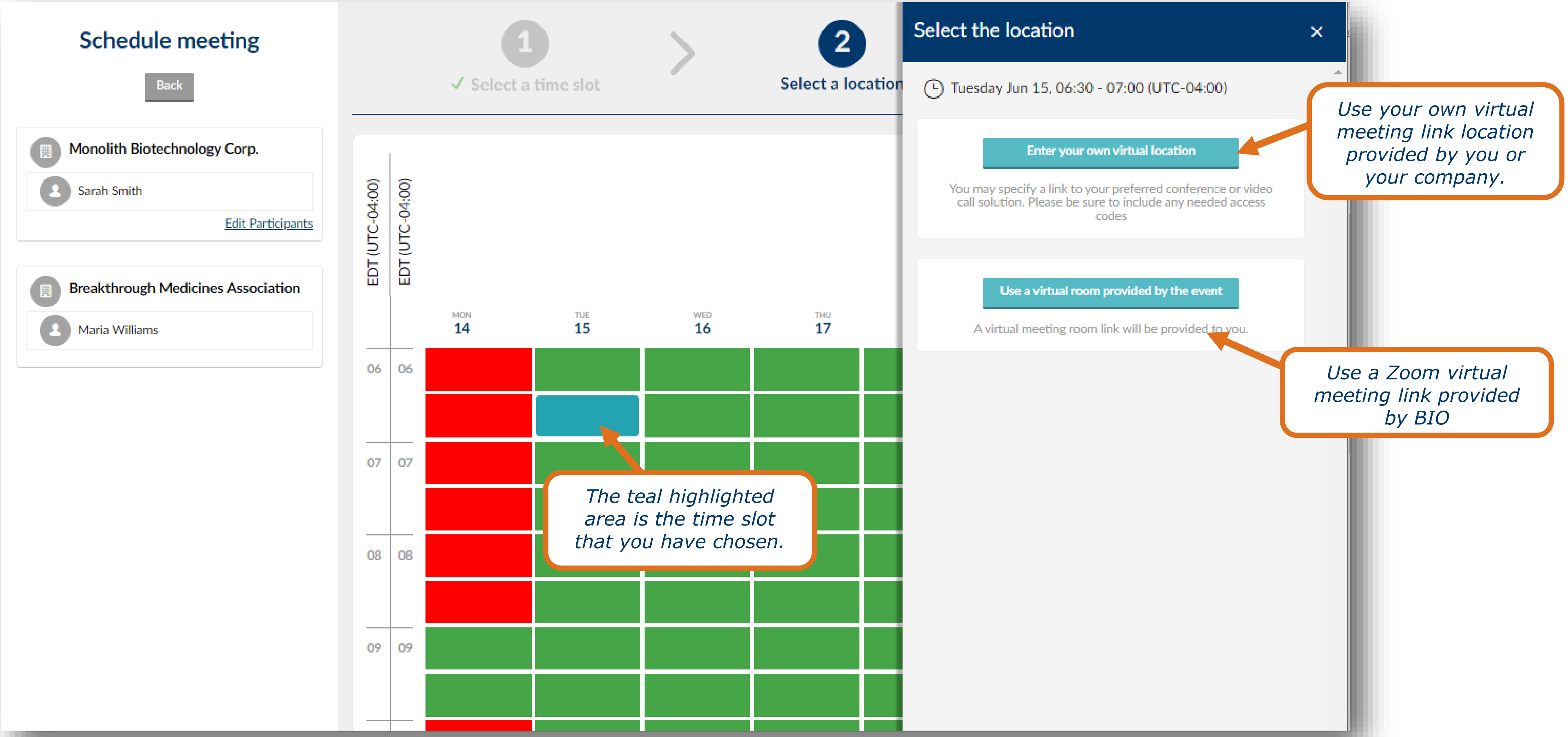
1. If you would like to change your availability without returning to the calendar page, click **Edit Participants** on the left hand side of the scheduling screen. This will bring up a list of your company's delegates.

2. Second, click **View Calendar** to edit your delegates' availability without leaving the scheduling page.



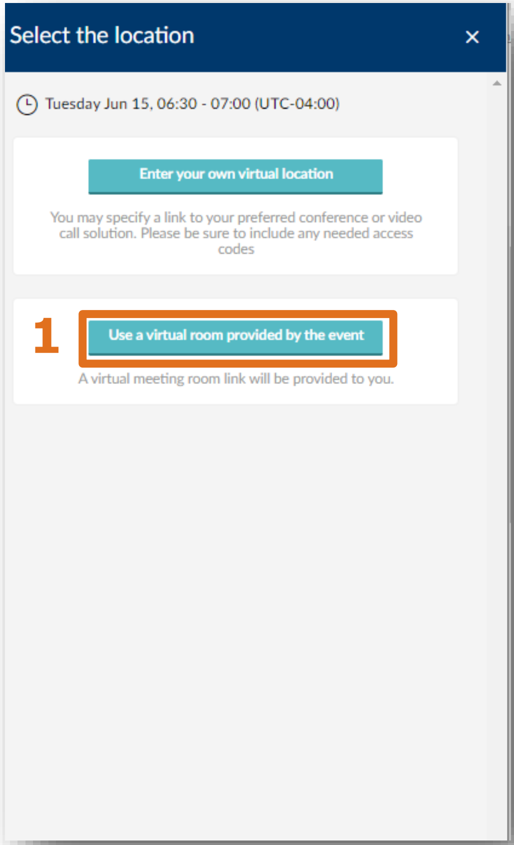
PLEASE NOTE:
*This is the panel that displays if you view your meeting participants' calendar. Here you may edit their availability, which will update the meeting scheduler on the left. Remember to click **Save** after making changes!*

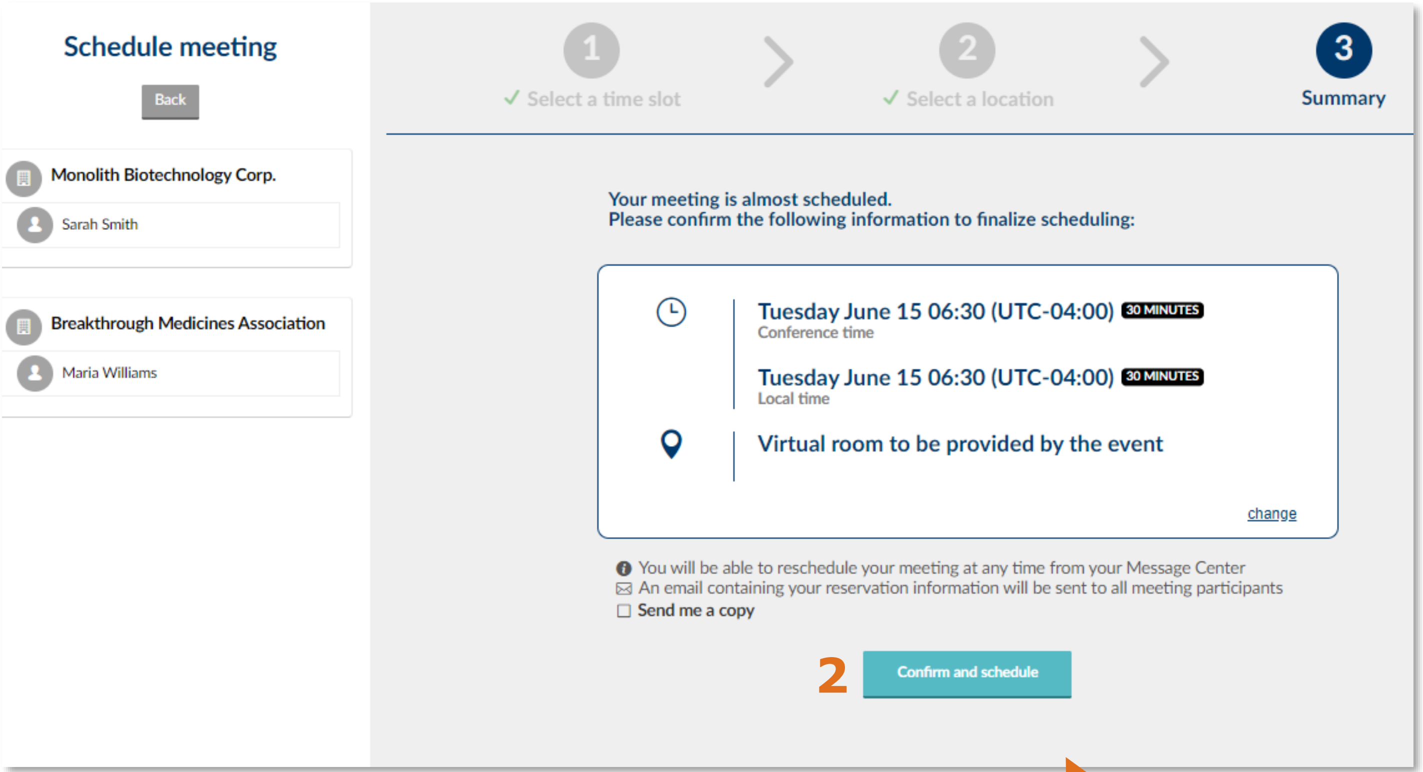
Scheduling an Accepted Meeting Request



Using a BIO Meeting Link

1. To use a Zoom link provided by BIO, select "Use a virtual room provided by the event."





2. Then click "Confirm and schedule" on the confirmation page to schedule the meeting.

A BIO meeting link will be assigned automatically after you schedule the meeting.

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

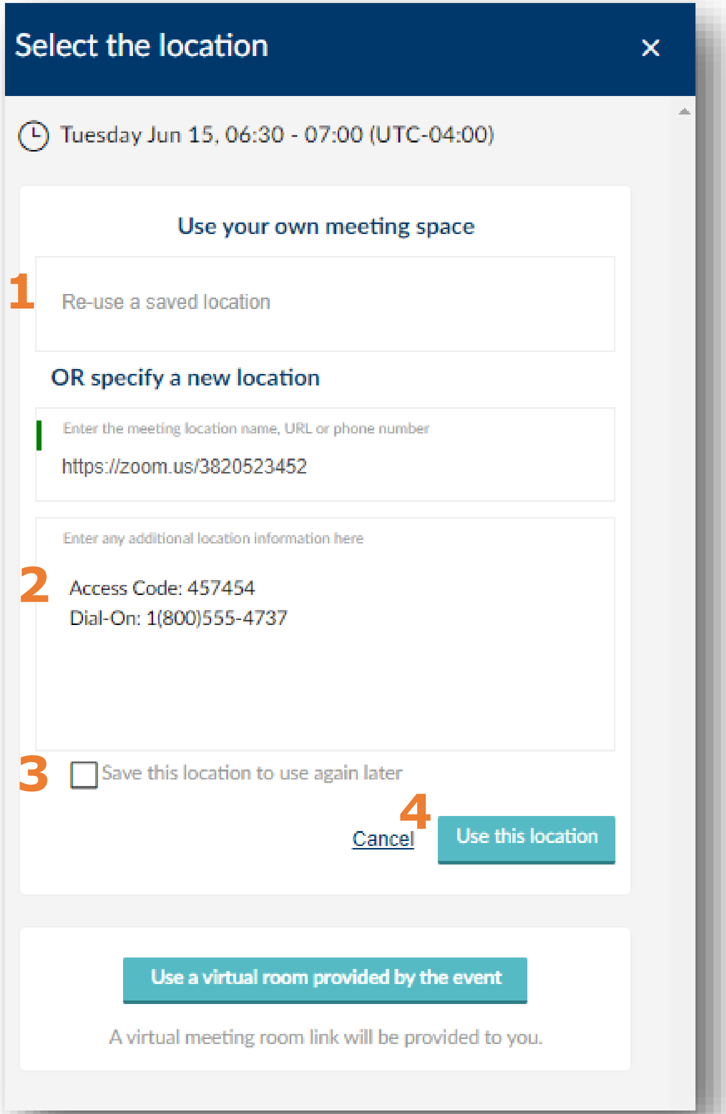
Using your own Meeting Link

1. If you have previously saved a meeting location, click in the "Re-use a saved location" field to select your location

2. If you want to create a new location, input the meeting link URL, and any necessary access codes or dial-in information

3. If you plan on using this location again, click the box that says "Save this location…"

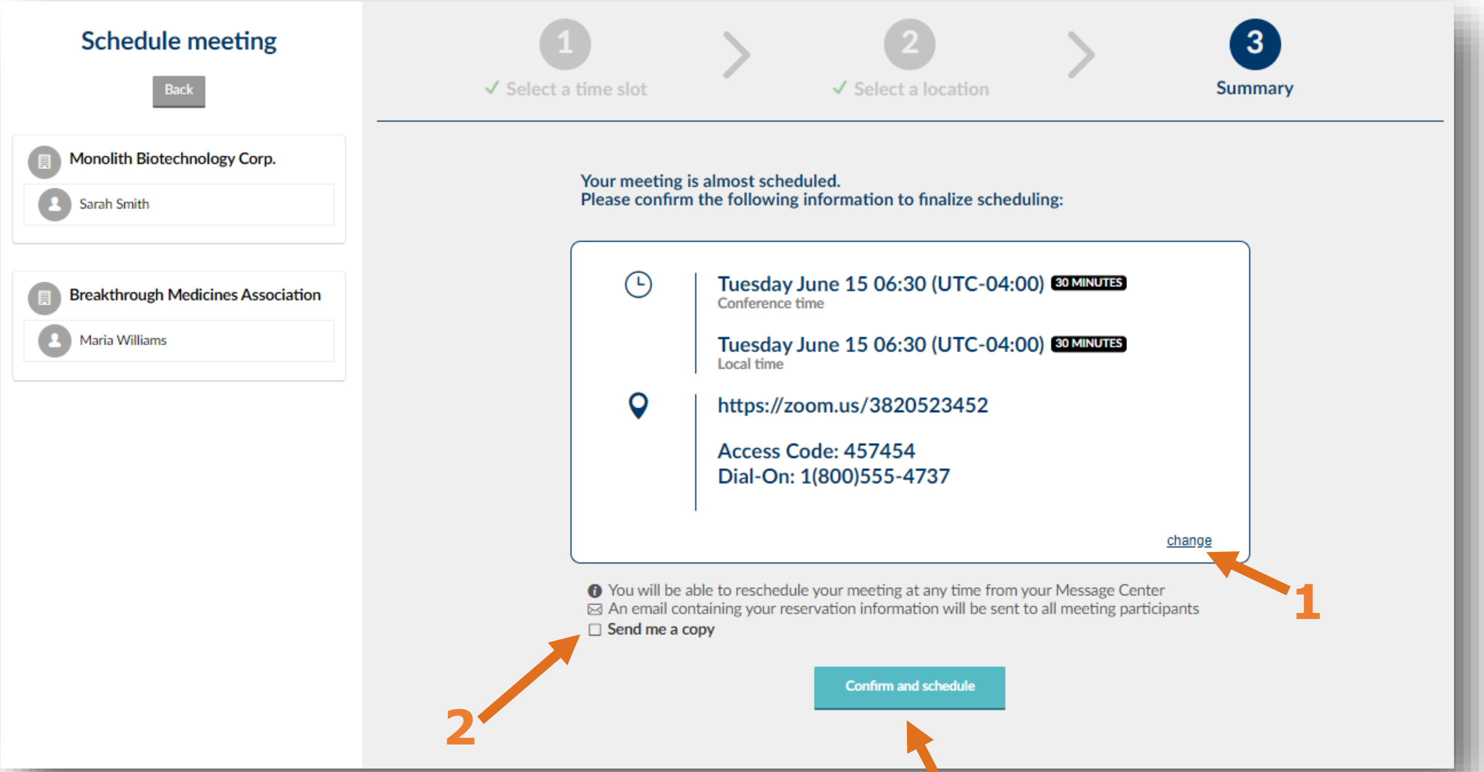
4. Select **Use this location** to confirm your meeting



PLEASE NOTE:
*Once you click **Use this location**, you will be taken to the summary screen.*

Summary when using your own Meeting Link

- After you have confirmed a meeting, 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.
- 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.*

Add customized tags

Update the meeting time and virtual location

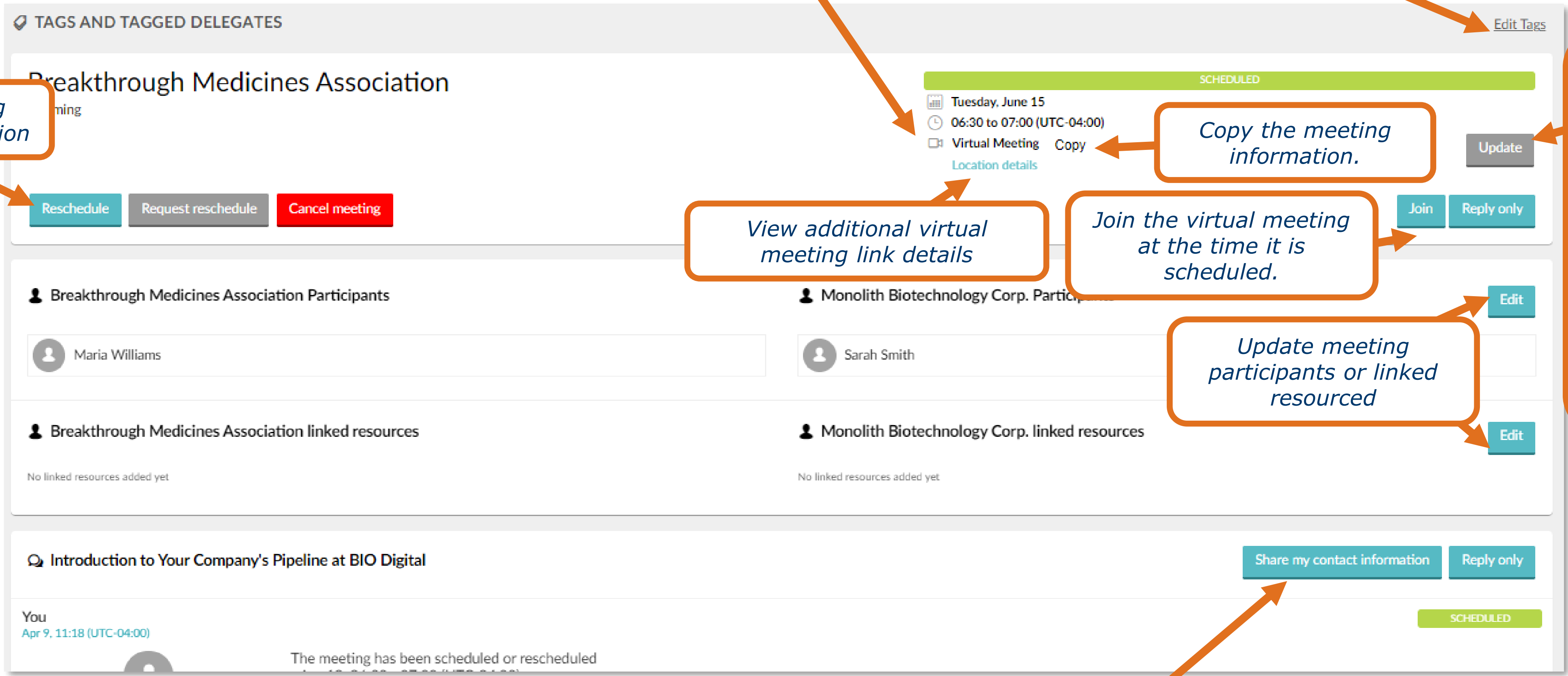
Quickly update the virtual meeting link details. You will need to select "Reschedule" on the left side of the meeting request if you wish to update the meeting time.

Copy the meeting information.

View additional virtual meeting link details

Join the virtual meeting at the time it is scheduled.

Update meeting participants or linked resourced



If you select the option to use a BIO meeting link, your meeting will be assigned one as soon as the meeting is scheduled.

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

TIP: *If you accidentally cancel a meeting, or your plans change, you will be given the option to uncancel the meeting. This will revert the meeting back to "Requested."*

Contact Information

ONE ON ONE PARTNERING™

Powered by BIO

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@bio1x1

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