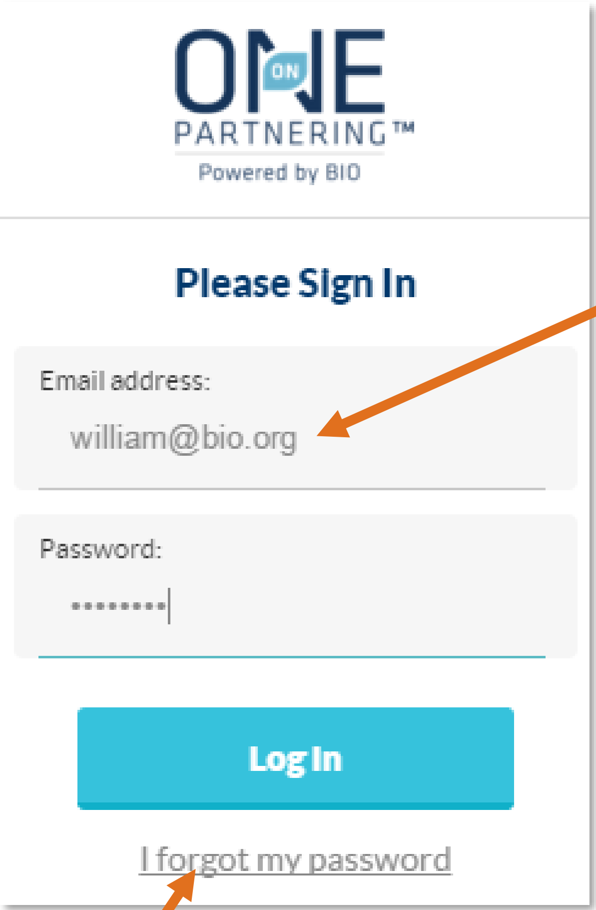
The BIO One-on-One Partnering™
BIO Digital Tutorial

ONE ON
PARTNERING™
Powered by BIO

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

Logging In

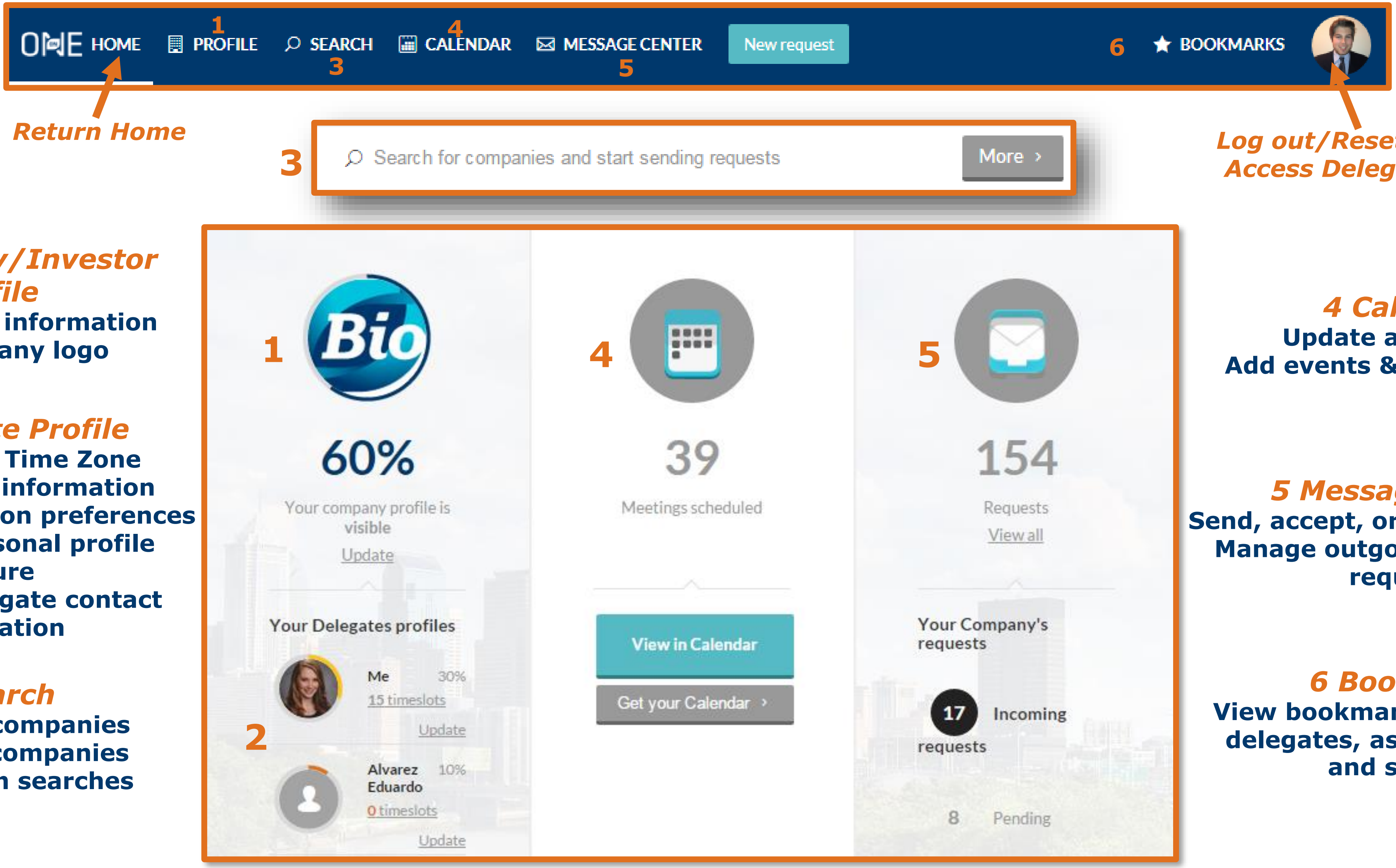
- Typically, you will receive a confirmation with login instructions from BIO Partnering within **one to three business days after applying for** partnering.
- If you used BIO's partnering system at a previous event, you may use the same password. The email will also contain a link to reset your password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



1 Company/Investor Profile
Add company information
Add company logo

2 Delegate Profile
Update your Time Zone
Add personal information
Update notification preferences
Add your personal profile picture
Add your Delegate contact information

3 Search
Search for companies
Bookmark companies
Save custom searches

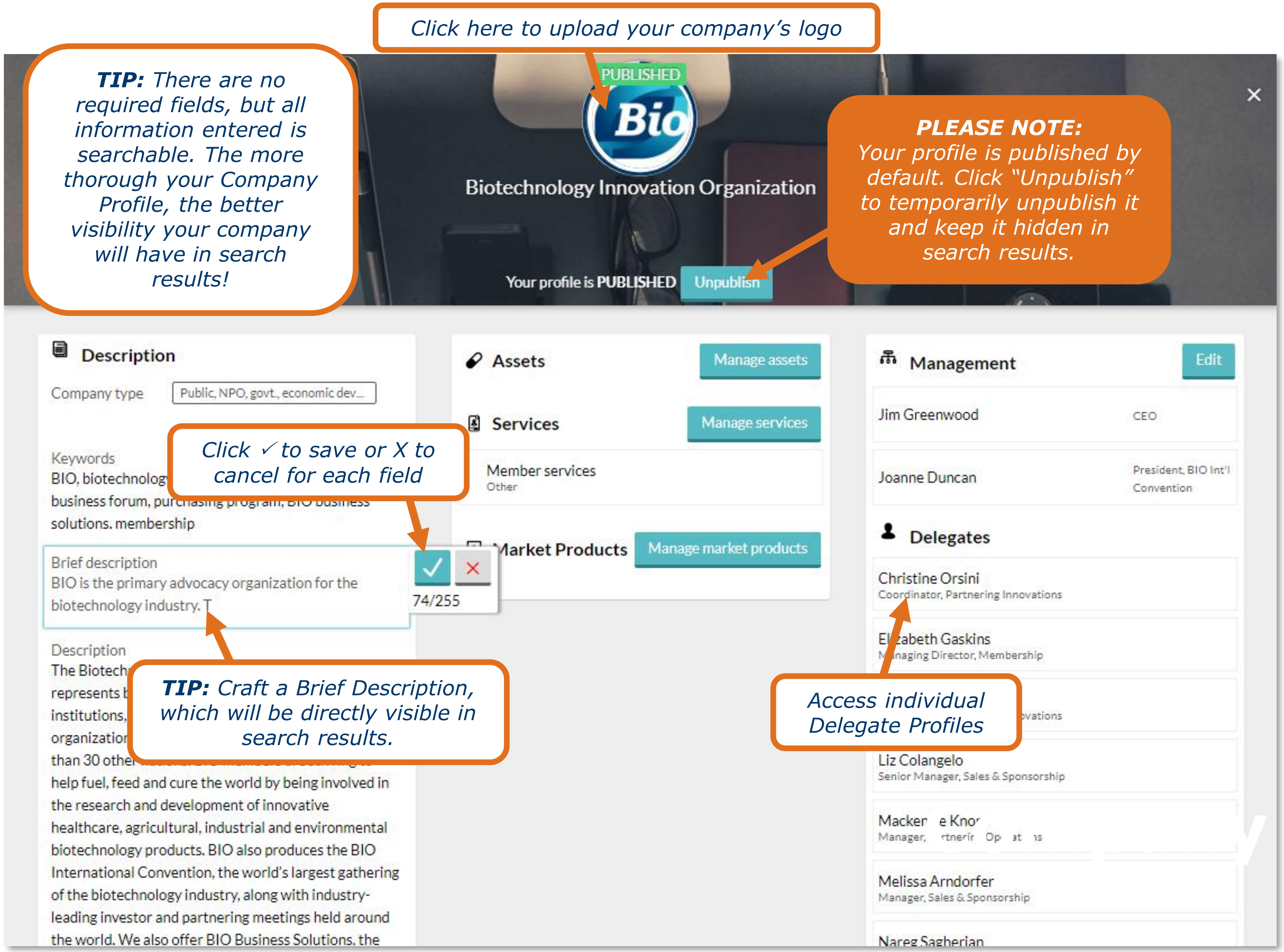
4 Calendar
Update availability
Add events & programming

5 Message Center
Send, accept, or decline requests
Manage outgoing & incoming requests

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

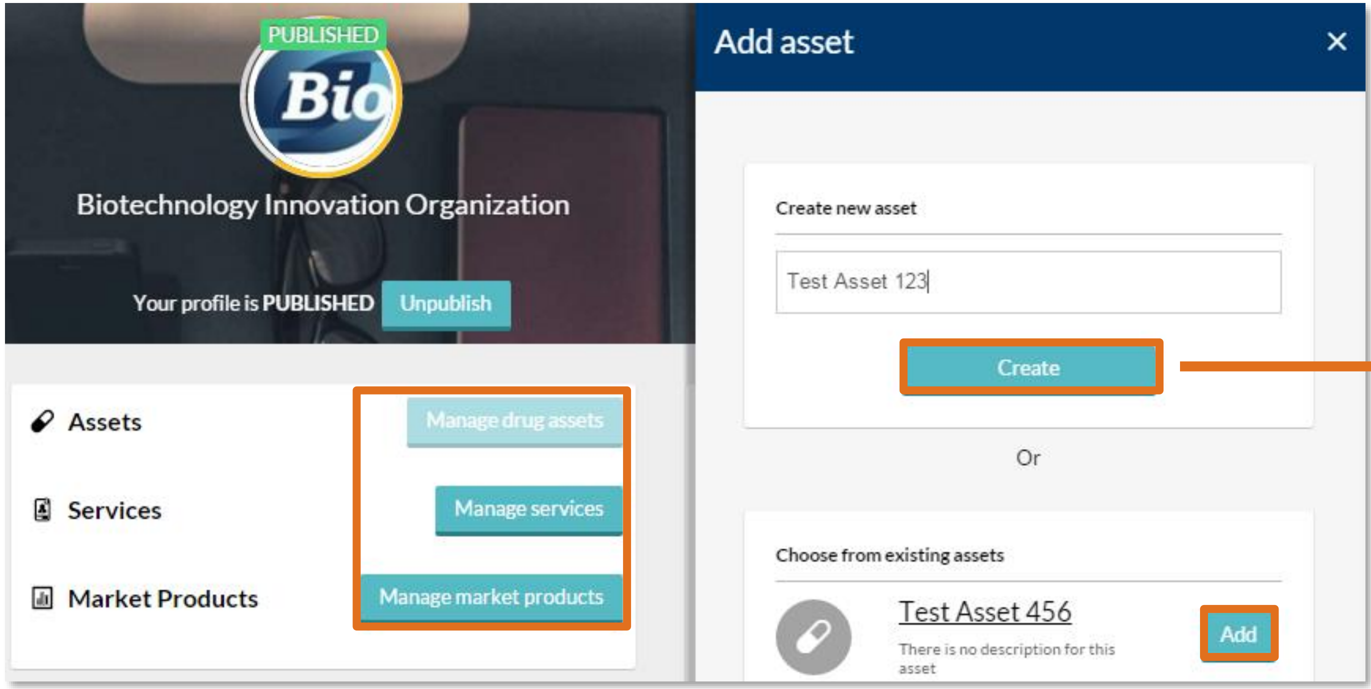
Company Profile

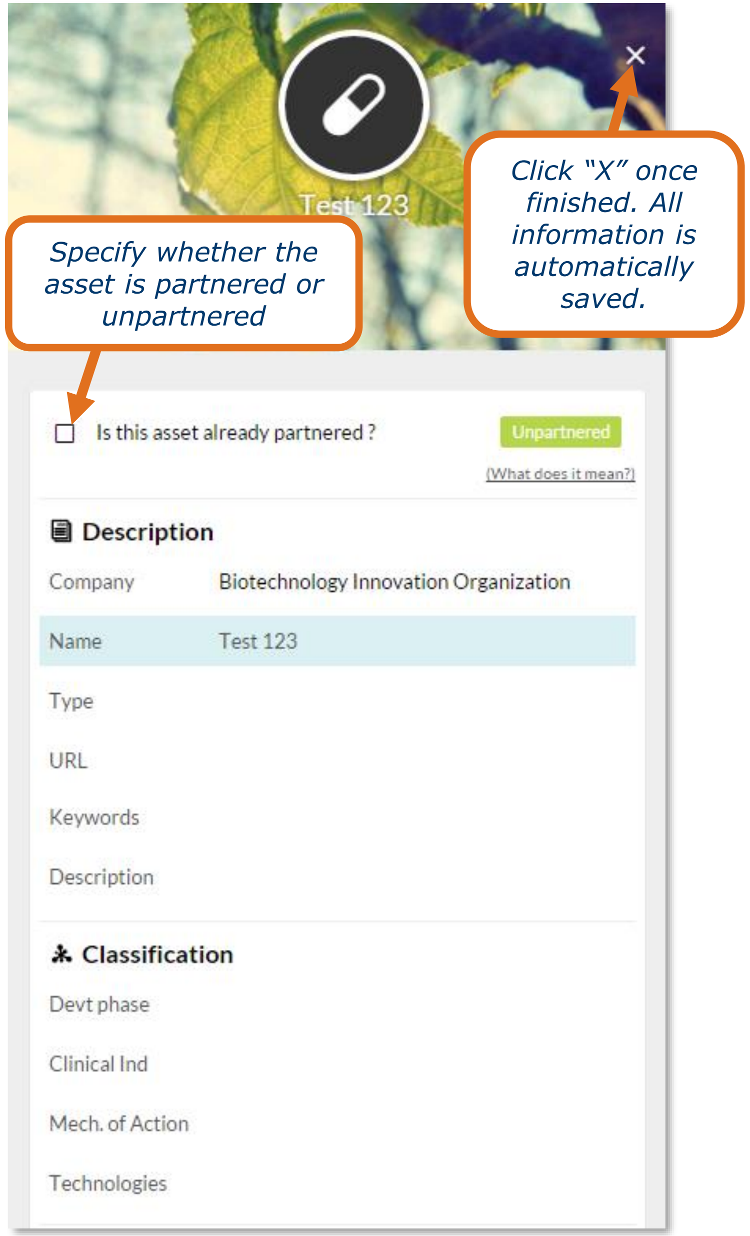
- ✓ Complete all applicable fields, especially those in the **Description, Areas of Interest, Financials,** and **Contact Information** sections
- ✓ Add **Assets, Services,** and **Market Products** if applicable
- ✓ Upload your company's logo
- ✓ Upload documents, graphics, and videos to the "Content"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



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

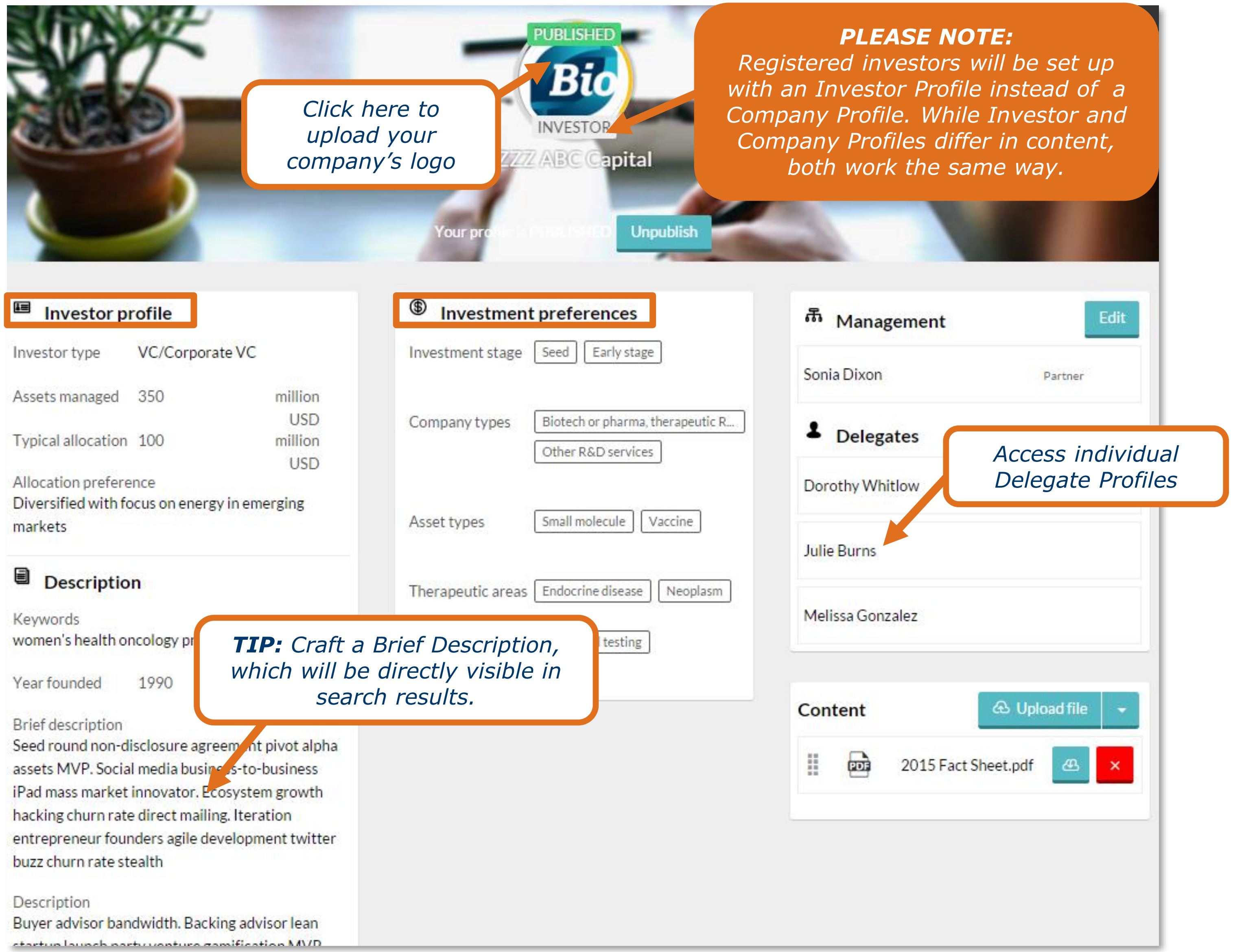




Investor Profile

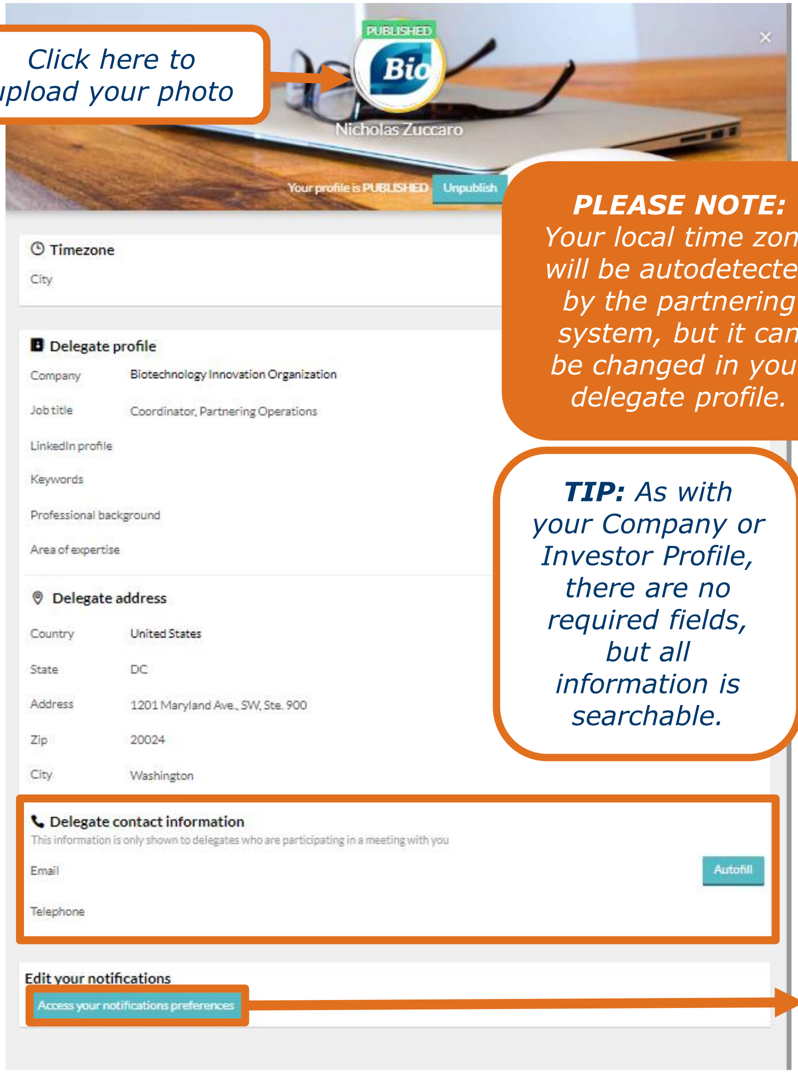
PLEASE NOTE:
Your profile is published by default. Click "Unpublish" to temporarily unpublish it and keep it hidden in search results.

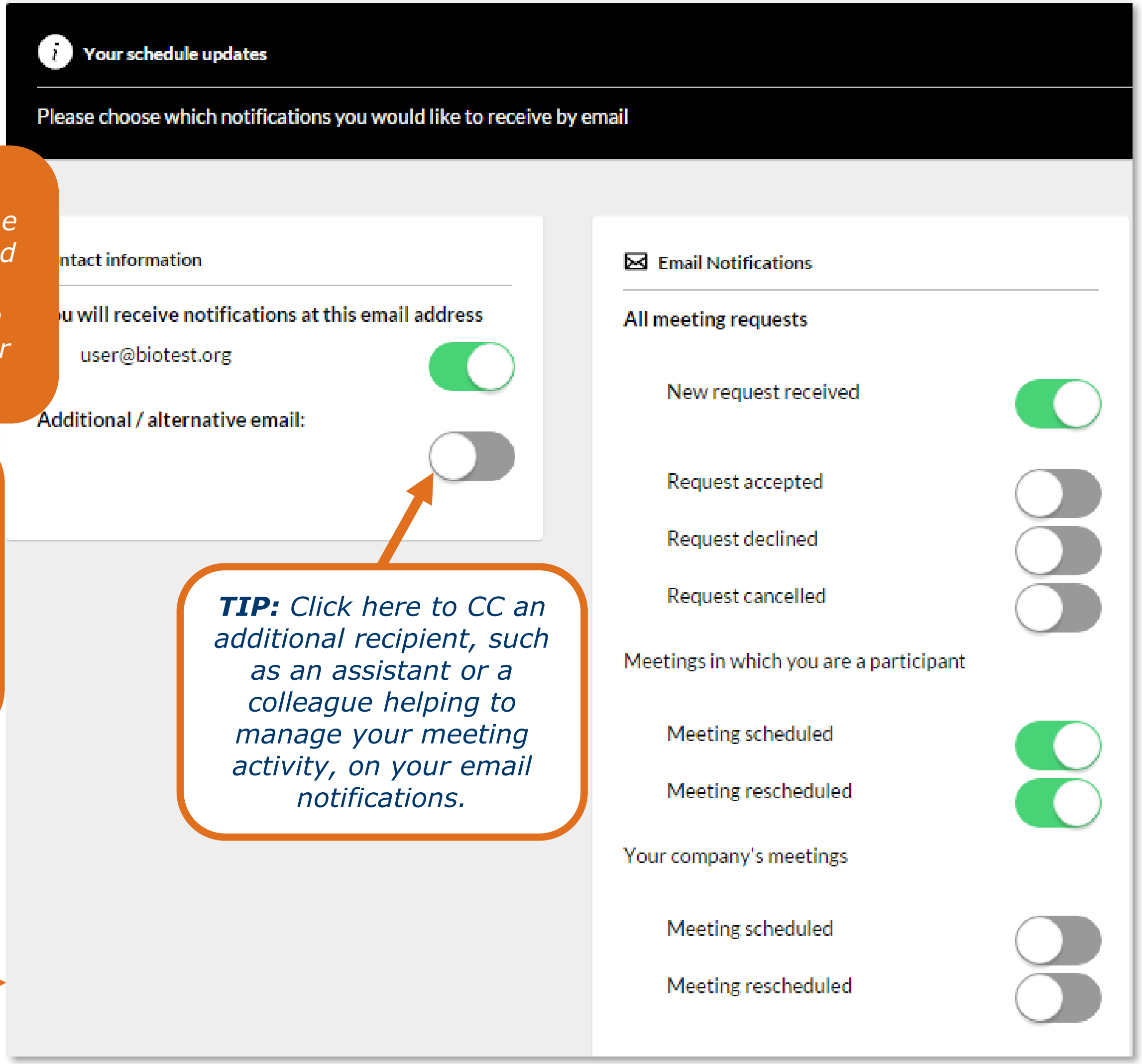
- ✓ Complete all applicable fields, especially those in the **Investor Profile, Description, Investment Preferences,** and **Contact Information** sections
- ✓ Upload your company logo
- ✓ Upload documents, graphics, and videos



Delegate Profile & Notification Preferences

- ✓ Set your Time Zone
- ✓ Complete all applicable fields, especially **Job Title**, **Professional Background**, and **Area of Expertise**
- ✓ Upload your headshot
- ✓ Tailor your notification preferences
- ✓ You can enter your preferred contact info and share it with a company in the Message Center. This information is only viewable by them.

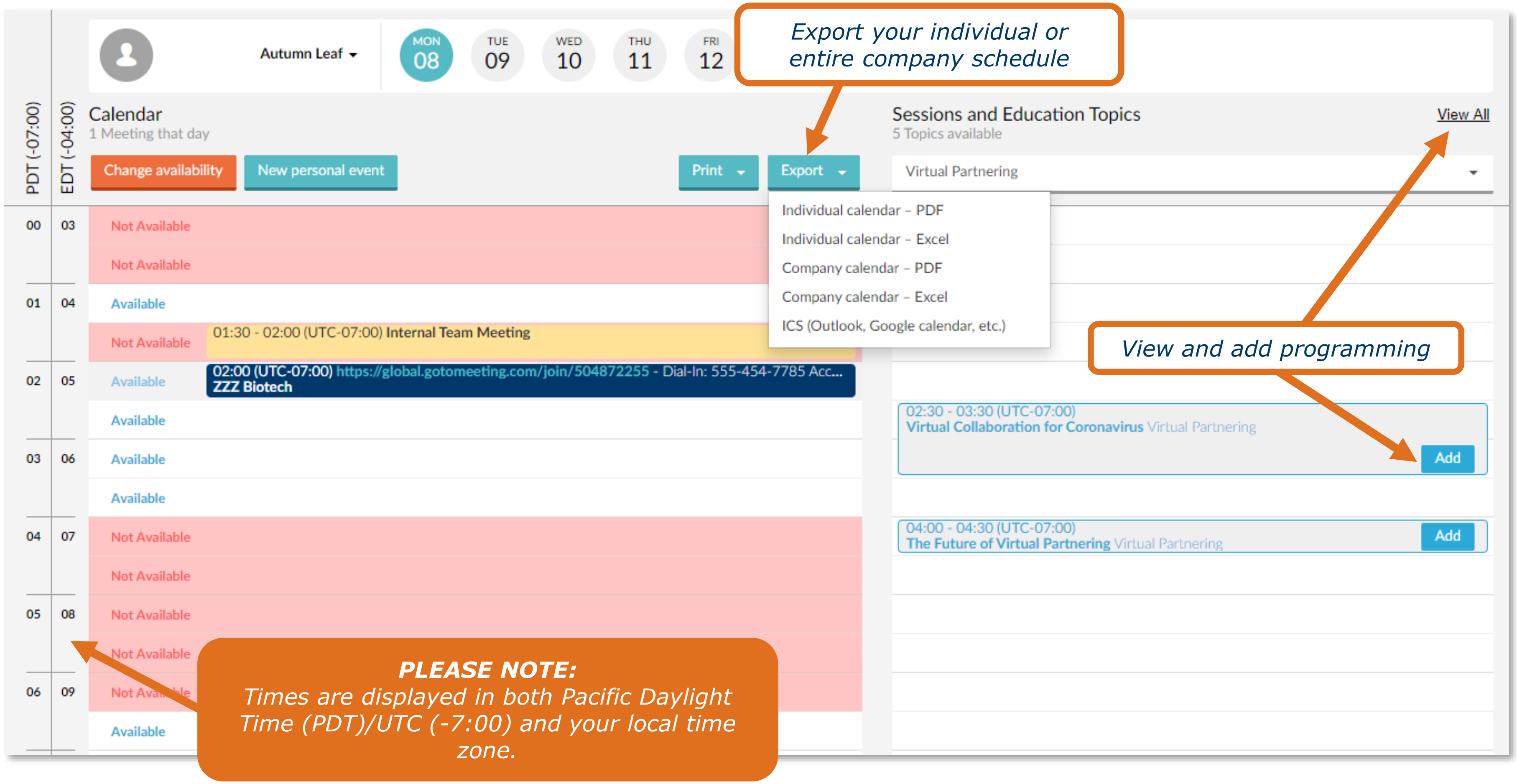




Disclaimer: This is an optional step. This information is only viewable to companies on meeting requests whom you share it with. BIO protects your privacy and does not publicly display your contact information or make it exportable.

Calendar

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



Updating Calendar Availability

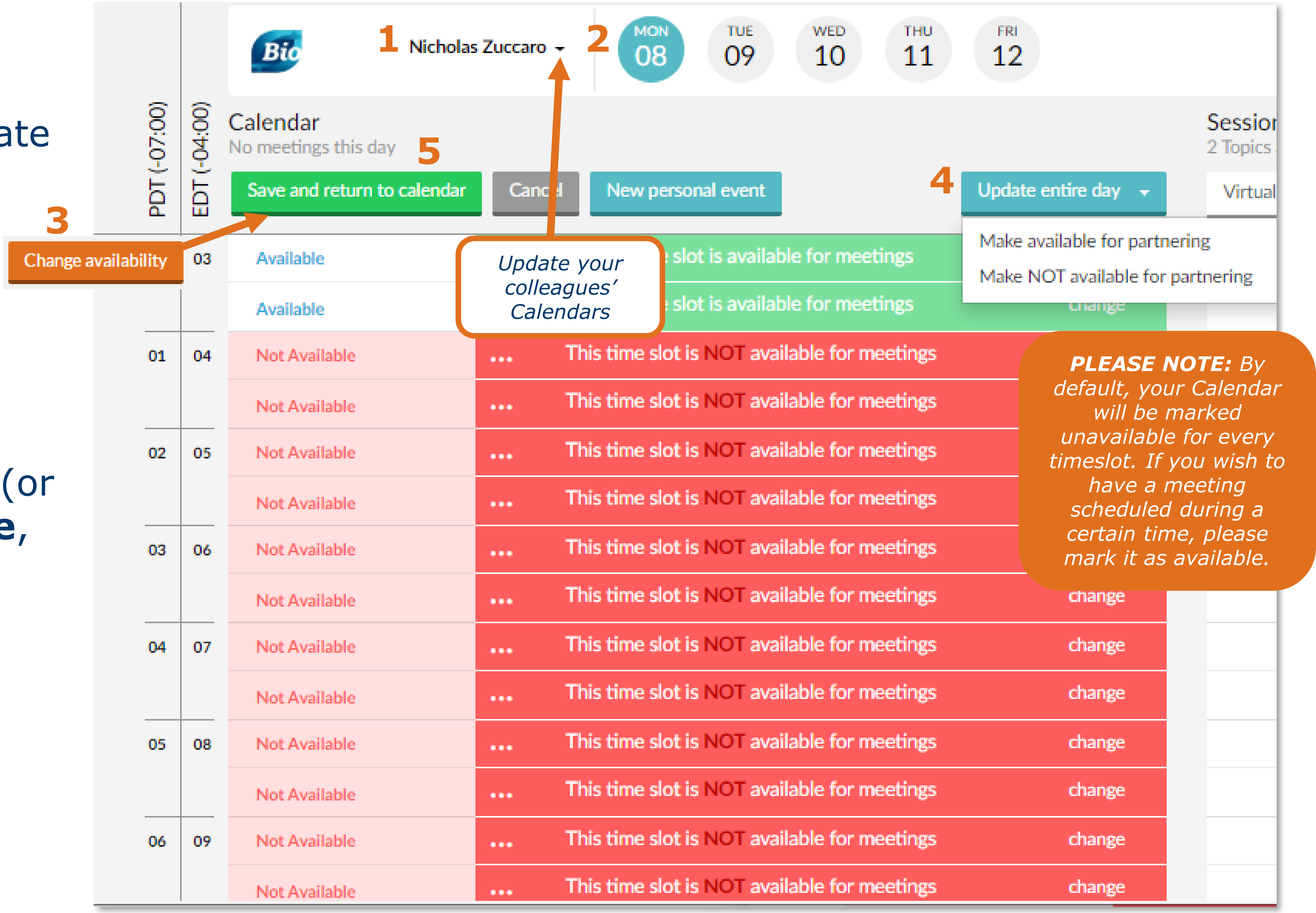
1. Select the appropriate delegate from the top left drop-menu

2. Select the correct day of the week

3. Click **Change availability**

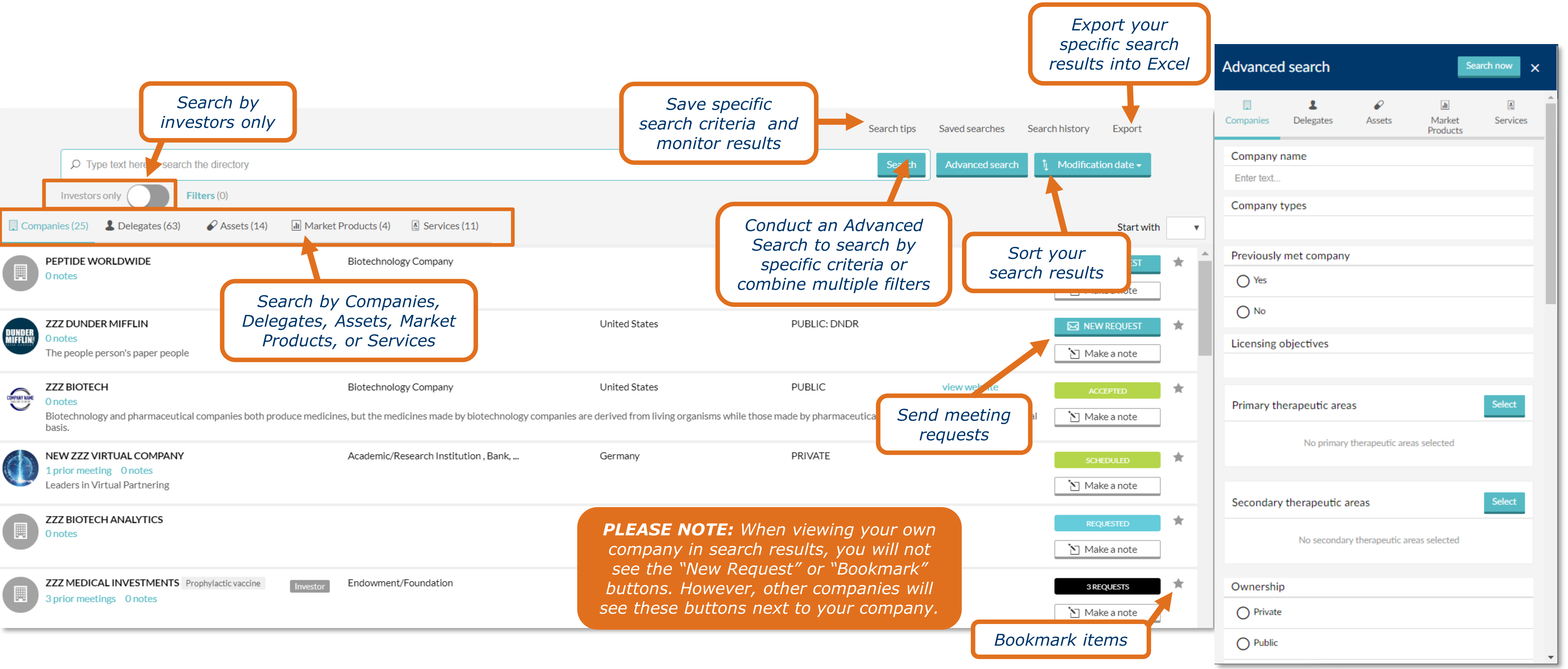
4. Mark the timeslots available (or unavailable) by clicking **Change**, or update the entire day

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



PLEASE NOTE: By default, your Calendar will be marked unavailable for every timeslot. If you wish to have a meeting scheduled during a certain time, please mark it as available.

Search & Advanced Search

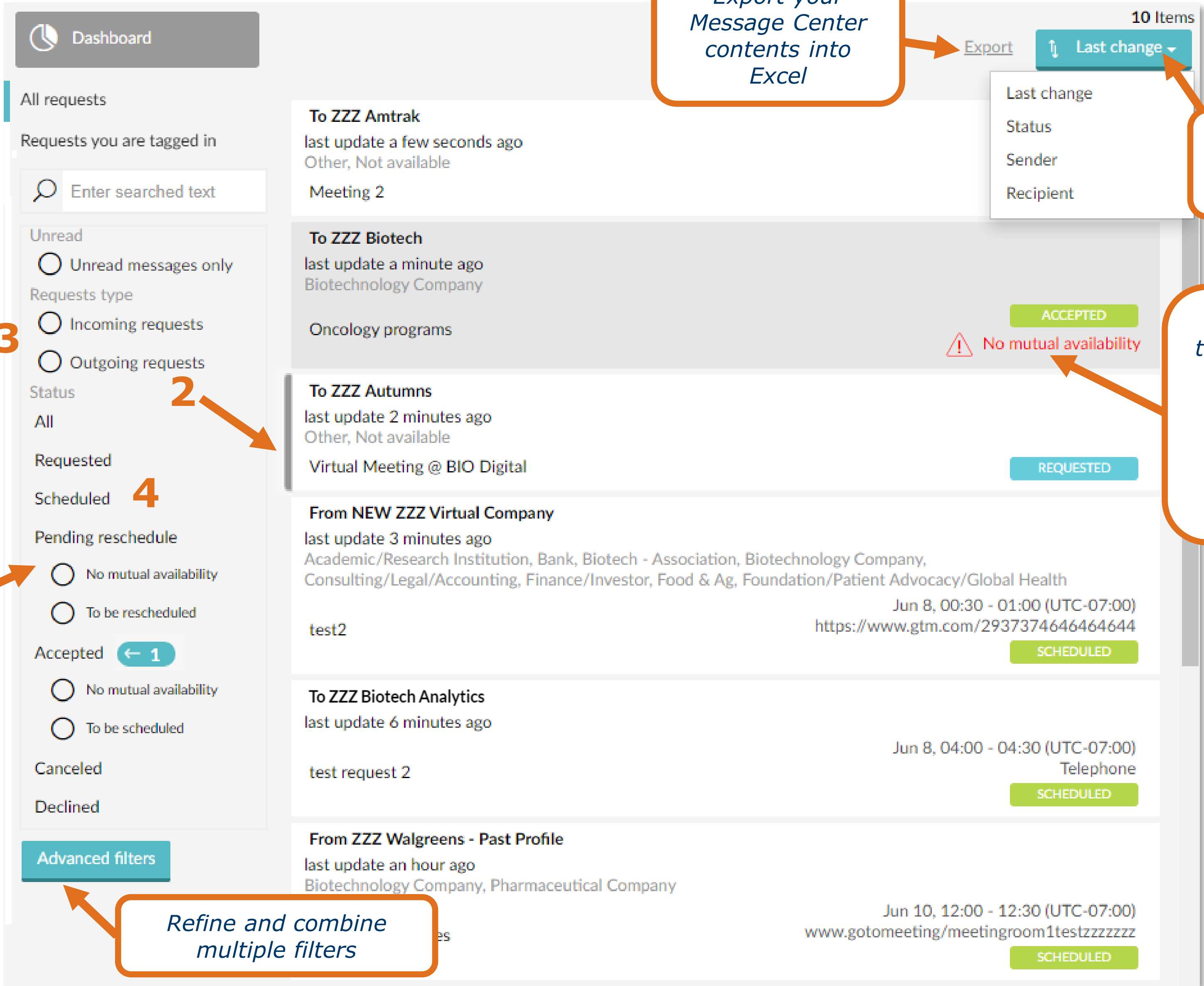


Message Center

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" and ready to be scheduled

Refine and combine multiple filters

Sending Meeting Requests

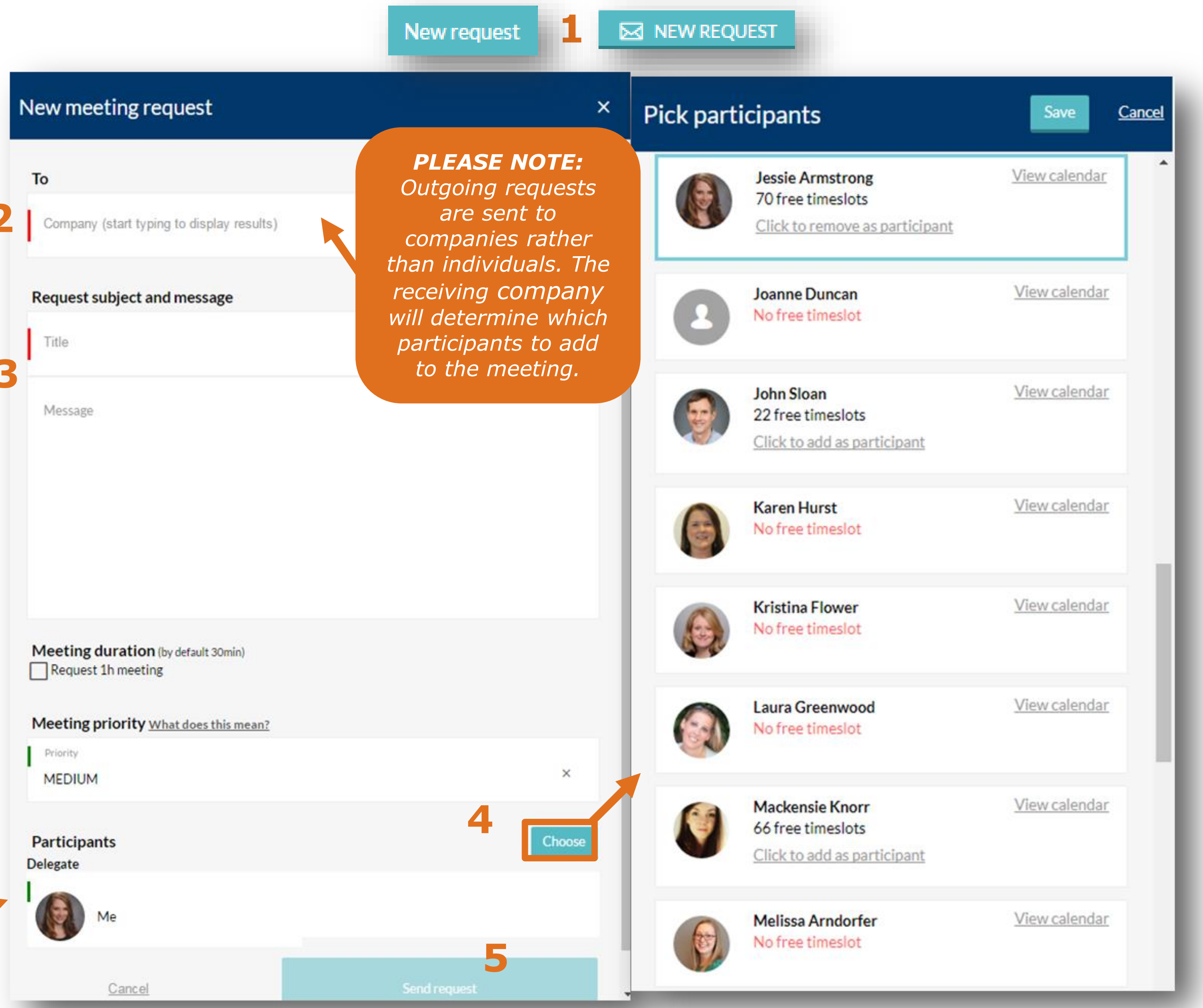
1. Click **New Request** at the top of the page, or the envelope in your search results

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

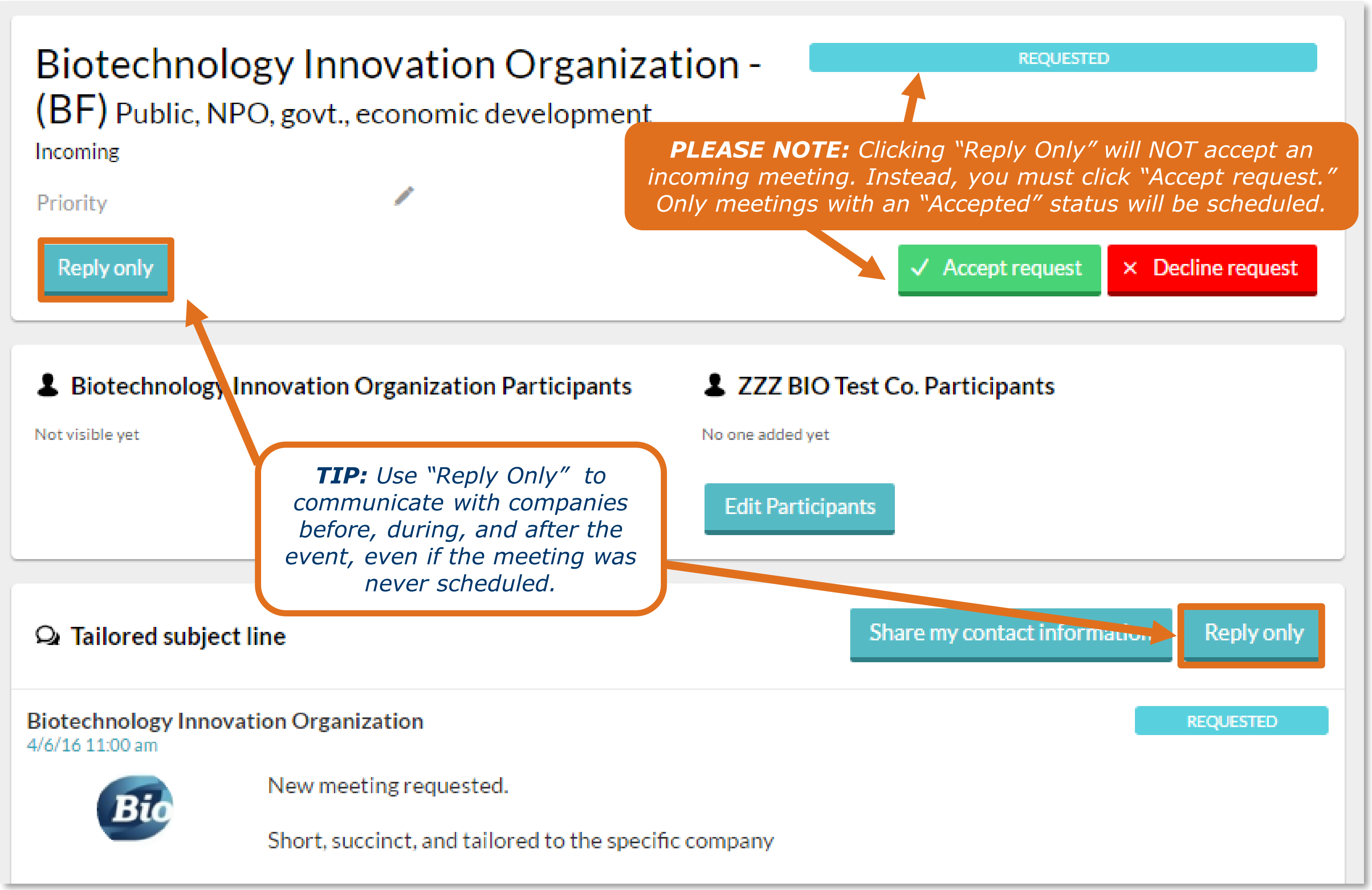
5. Click **Send Request**



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.*

“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

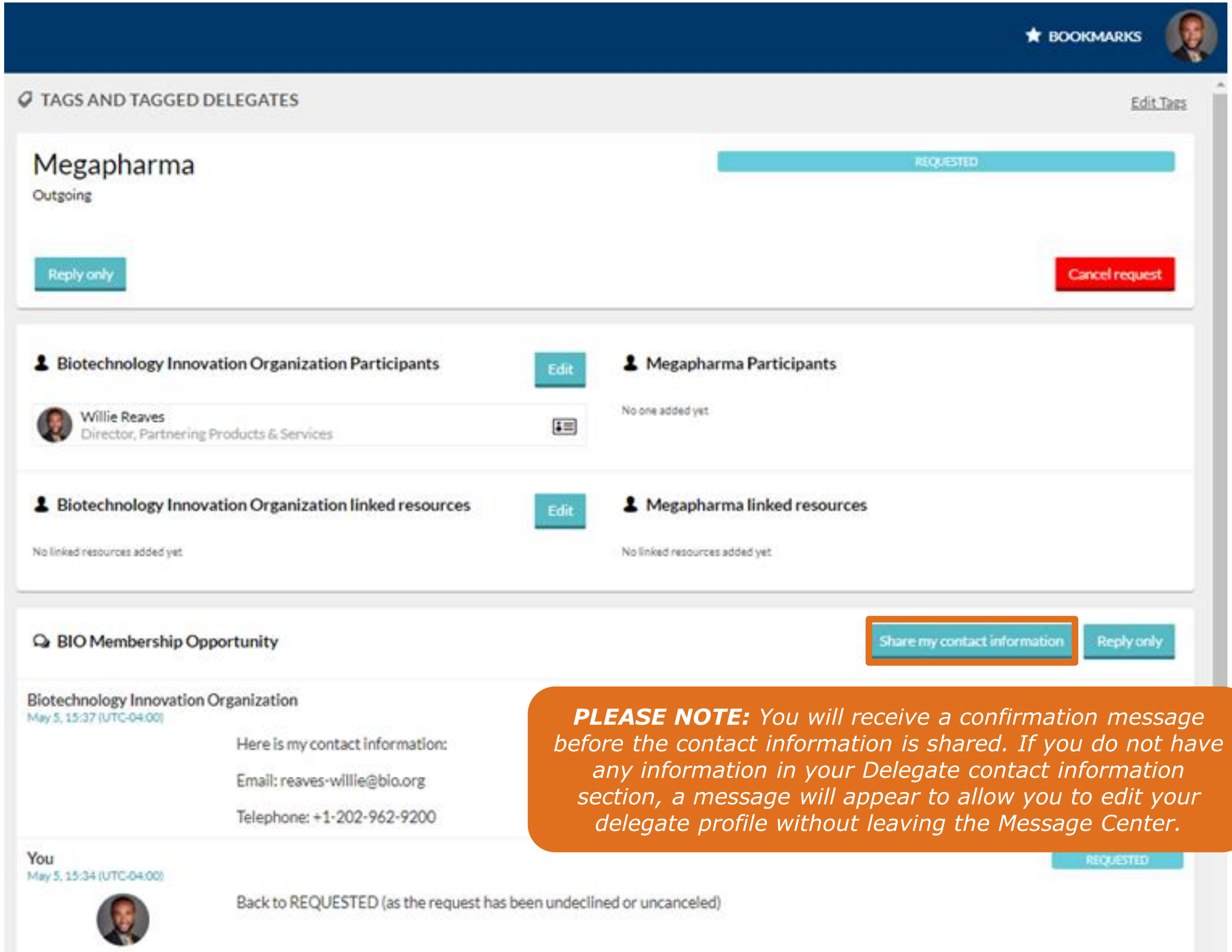


Sharing Your Contact Information

On a meeting request, click **"Share my contact information"**

- Your contact information will be visible to delegates from your company and the other company
- It will appear as an entry in the message thread
- Sharing is on a **per company** basis to protect your privacy

Disclaimer: This is an optional step. This information is only viewable to companies on meeting requests whom you share it with. BIO protects your privacy and does not publicly display your contact information or make it exportable.



PLEASE NOTE: *You will receive a confirmation message before the contact information is shared. If you do not have any information in your Delegate contact information section, a message will appear to allow you to edit your delegate profile without leaving the Message Center.*

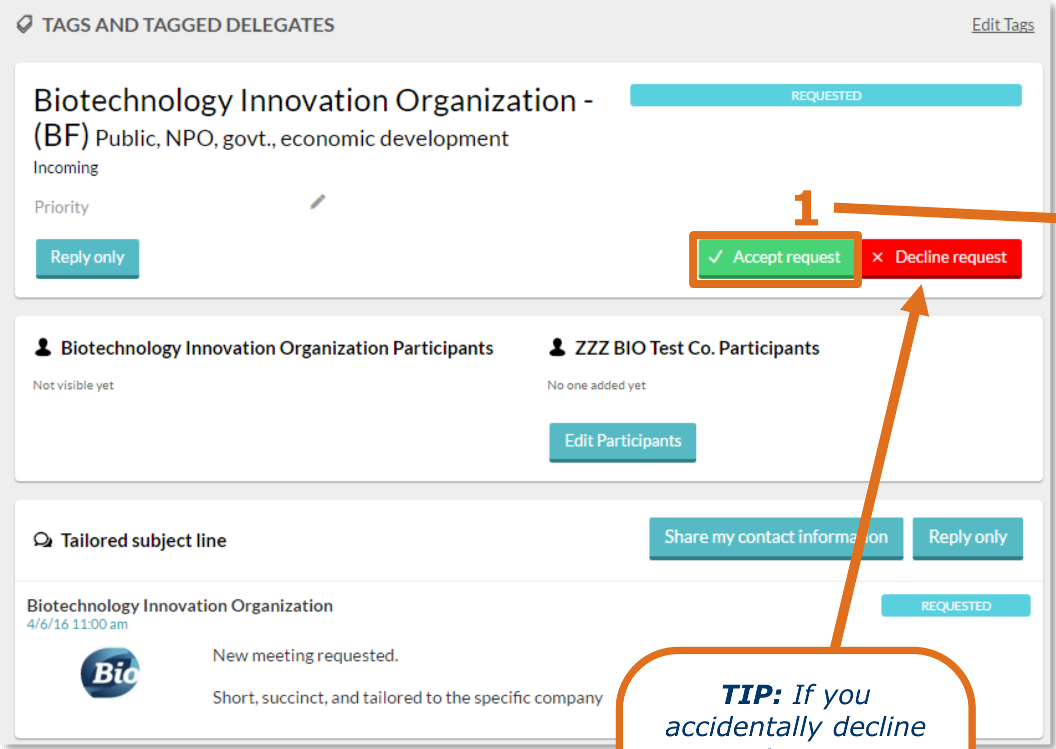
Accepting, Declining, & Canceling Meeting Requests

Accept

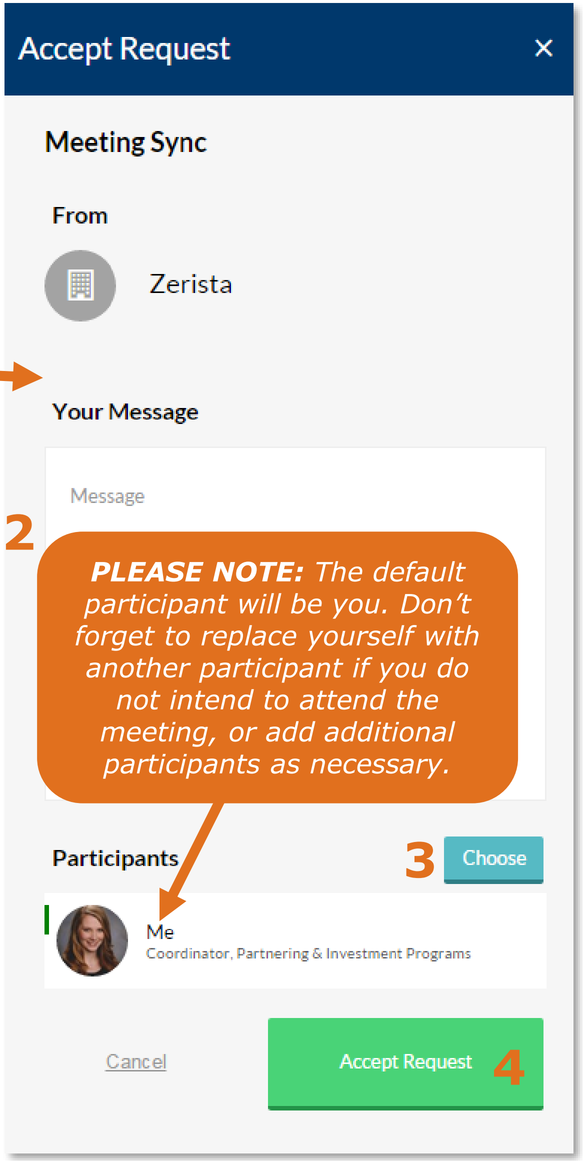
1. Click **Accept Request**
2. Include an explanation in the **Message** field (optional)
3. Update meeting participants and availability, if necessary
4. Click **Accept Request**

Decline (not pictured)

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



***TIP:** If you accidentally decline a meeting, or your change your mind, you will have the option to undecline the meeting. This will revert meeting's status back to "Requested."*



***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.*

Scheduling an Accepted Meeting Request

TAGS AND TAGGED DELEGATES

Edit Tags

ZZZ Biotech Biotechnology Company

Outgoing

ACCEPTED

Schedule

Cancel request

SELF SCHEDULING: This meeting needs to be scheduled.

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.

utumn Participants

Edit

Autumn Leaf

Add or remove participants from your company to this meeting

ZZZ Biotech Participants

Betty Brown

Quickly share the information from your Delegate contact information section in your Delegate Profile with the other company.

Message meeting participants in partnering system

ZZZ Autumn linked resources

Edit

No linked resources added yet

ZZZ Biotech linked resources

No linked resources added yet

Add or remove linked resources from your company profile's content section or your company's listed assets, market products, or services

Virtual Meeting @ BIO Digital

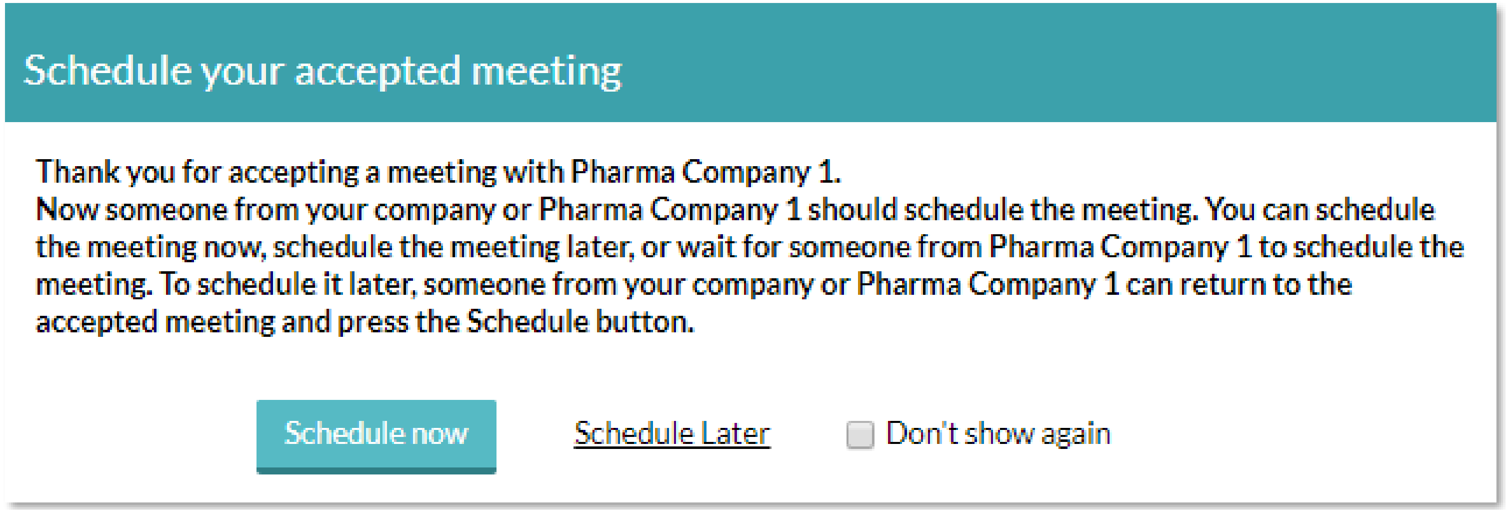
Share my contact information

Reply only

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

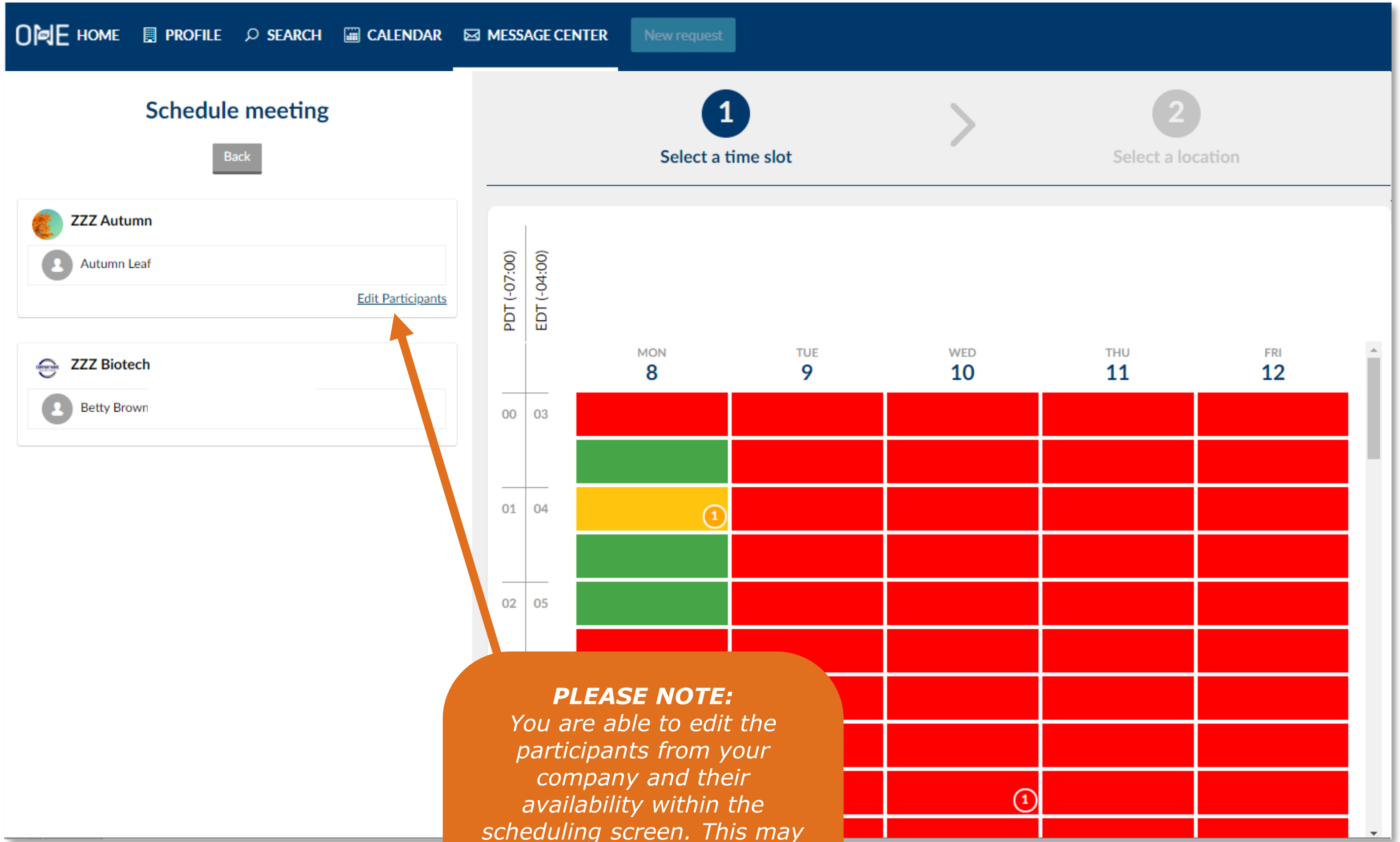
- If you accept an incoming meeting request, you will receive a popup in the **Message Center** asking if you would like to schedule the meeting now or later.



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

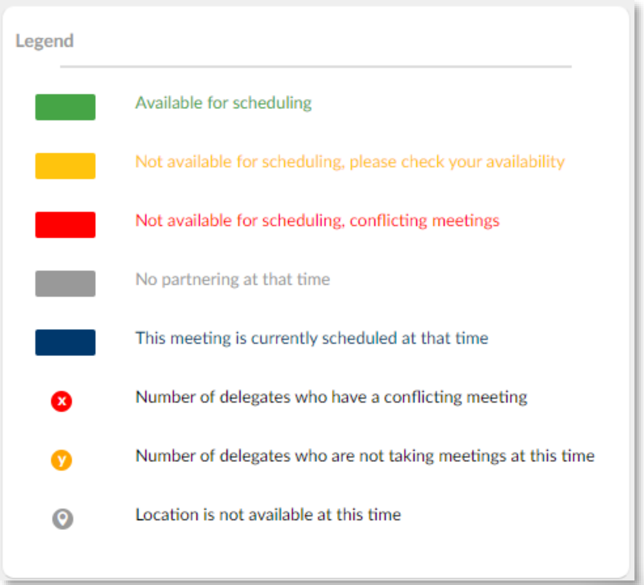
- Click on an available timeslot to bring up your choices for the meeting location
- Both the conference time zone and your own time zone will be displayed on the left-hand side



PLEASE NOTE:
You are able to edit the participants from your company and their availability within the scheduling screen. This may help you find an open timeslot with the other company.
You will still be able to edit your participants after scheduling your meeting within the Message Center.

Scheduling an Accepted Meeting Request

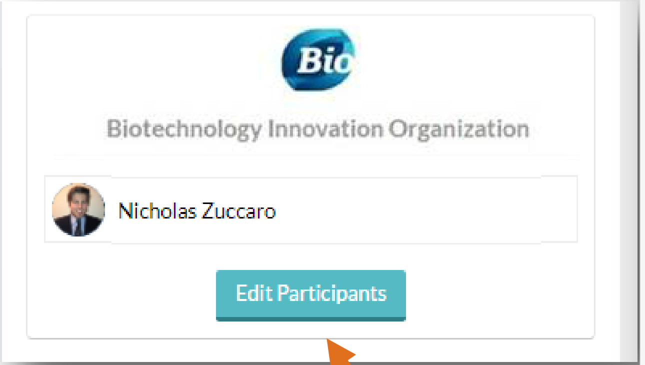
- Within the scheduling window, you will encounter all available timeslots.
- Opening more timeslots increases the chances of having mutual availability to schedule your meeting.

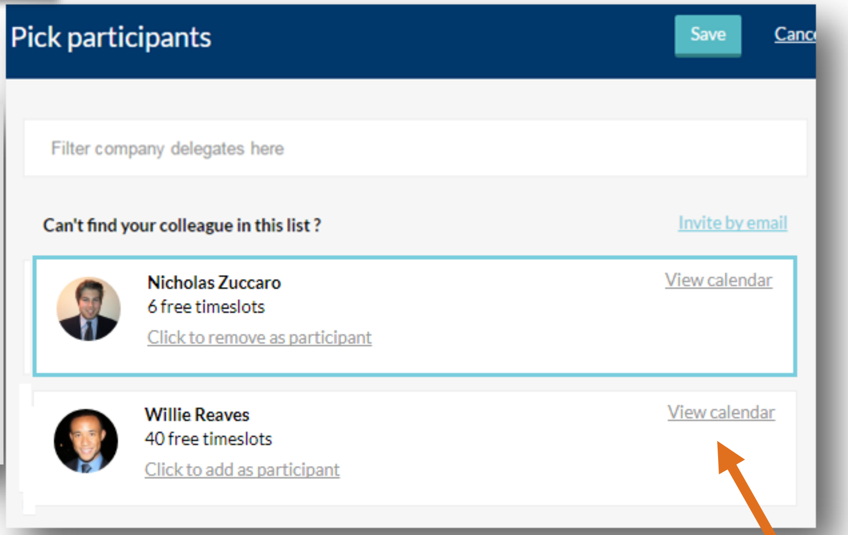


Changing Availability

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.

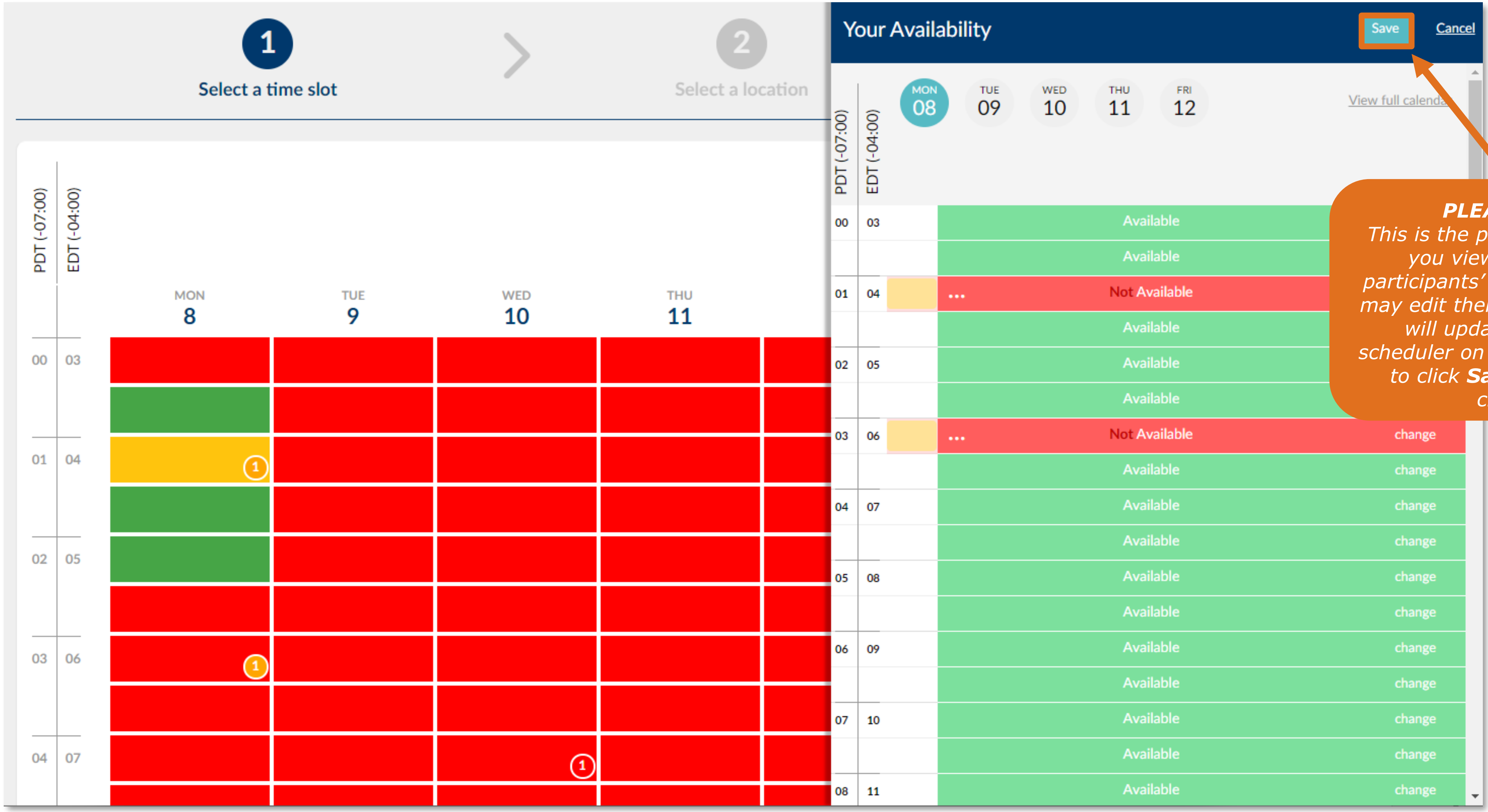




1

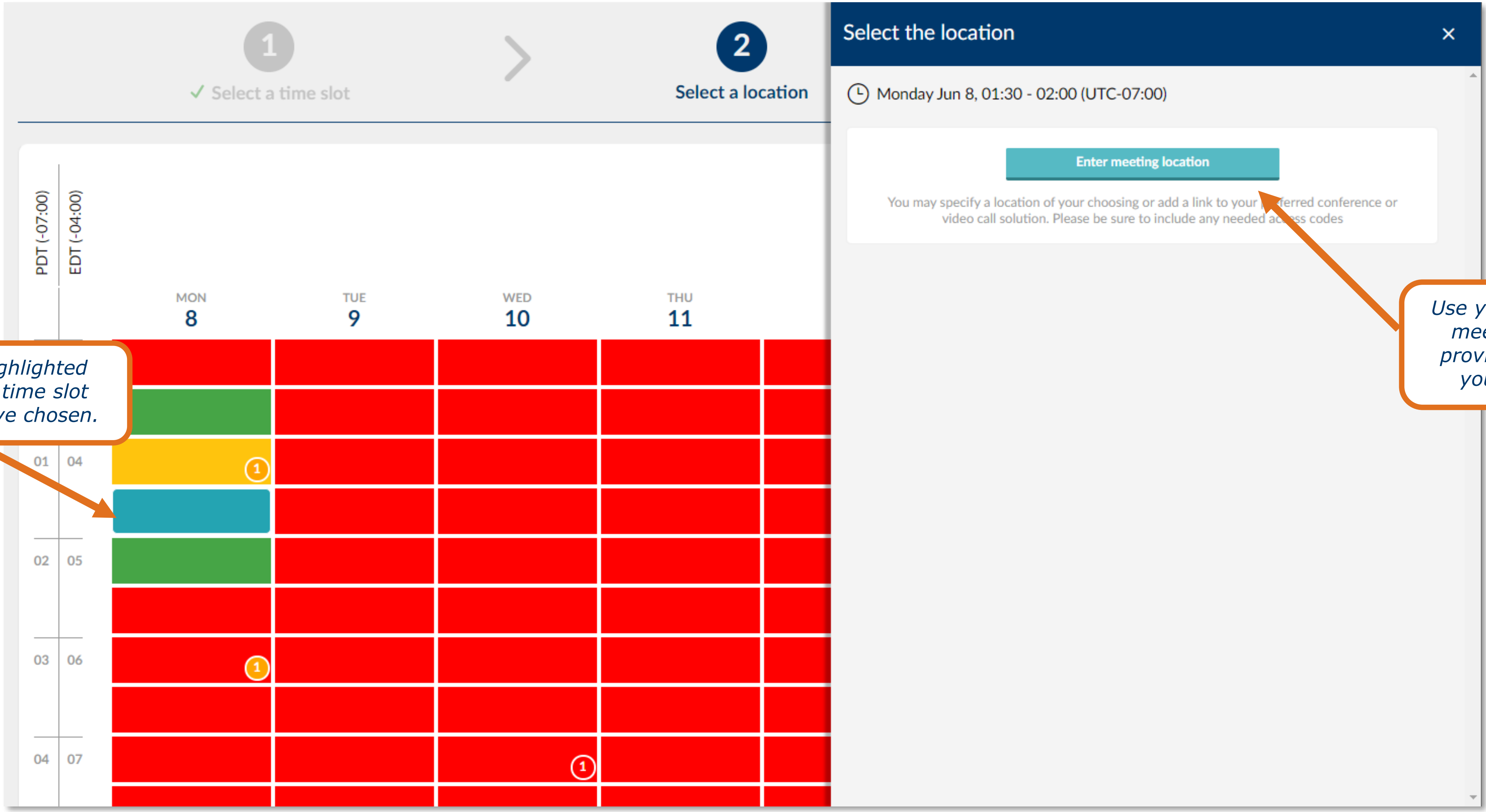
2

Changing Availability Within Scheduling



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



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

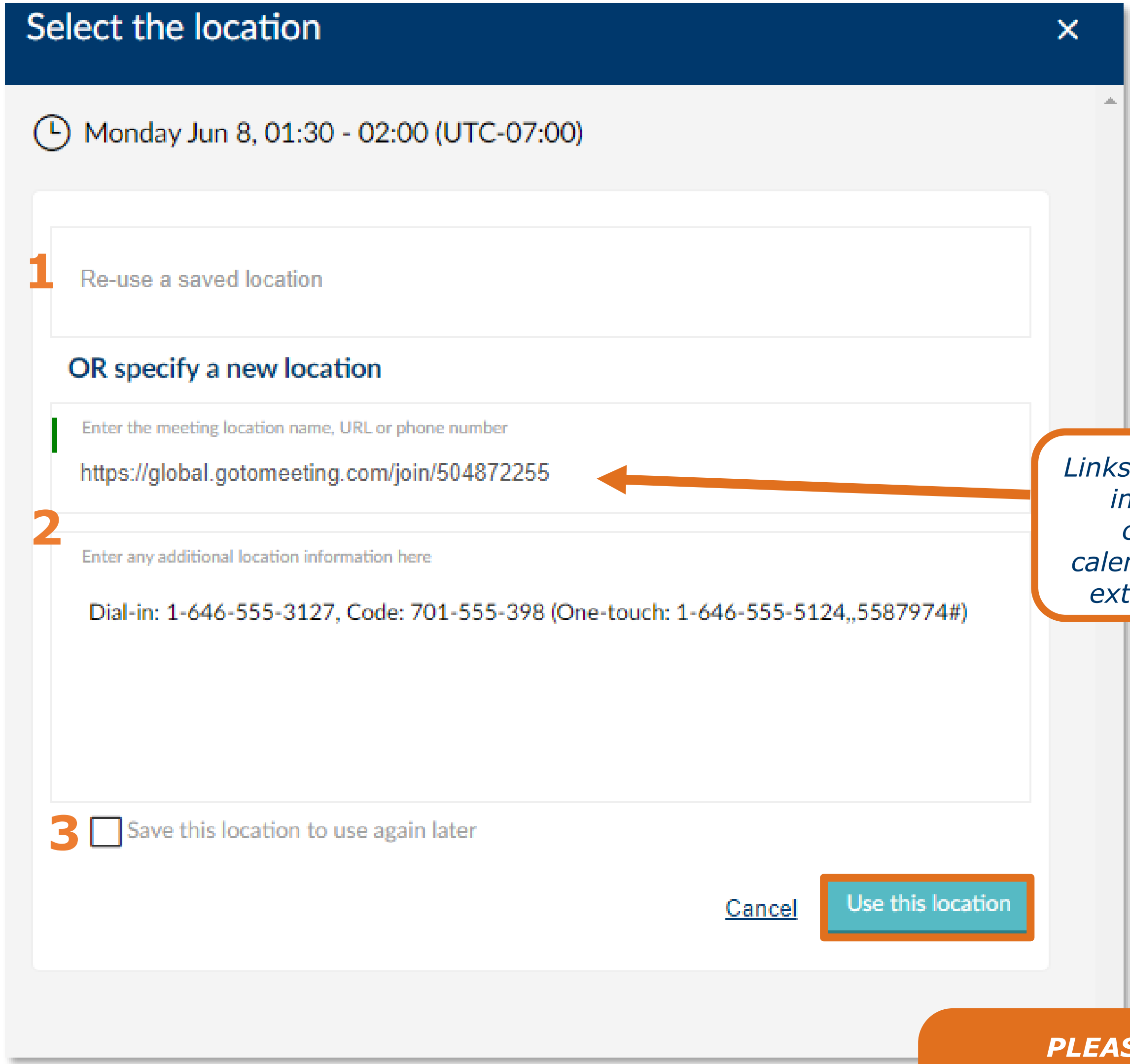
Use your own virtual meeting location provided by you or your company.

Using your own Virtual Meeting Space

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 name or url, any dial-in numbers, and a brief description

3. If you plan on using this location again, click the box that says "Save this location…", then select **Use this location** to confirm your meeting

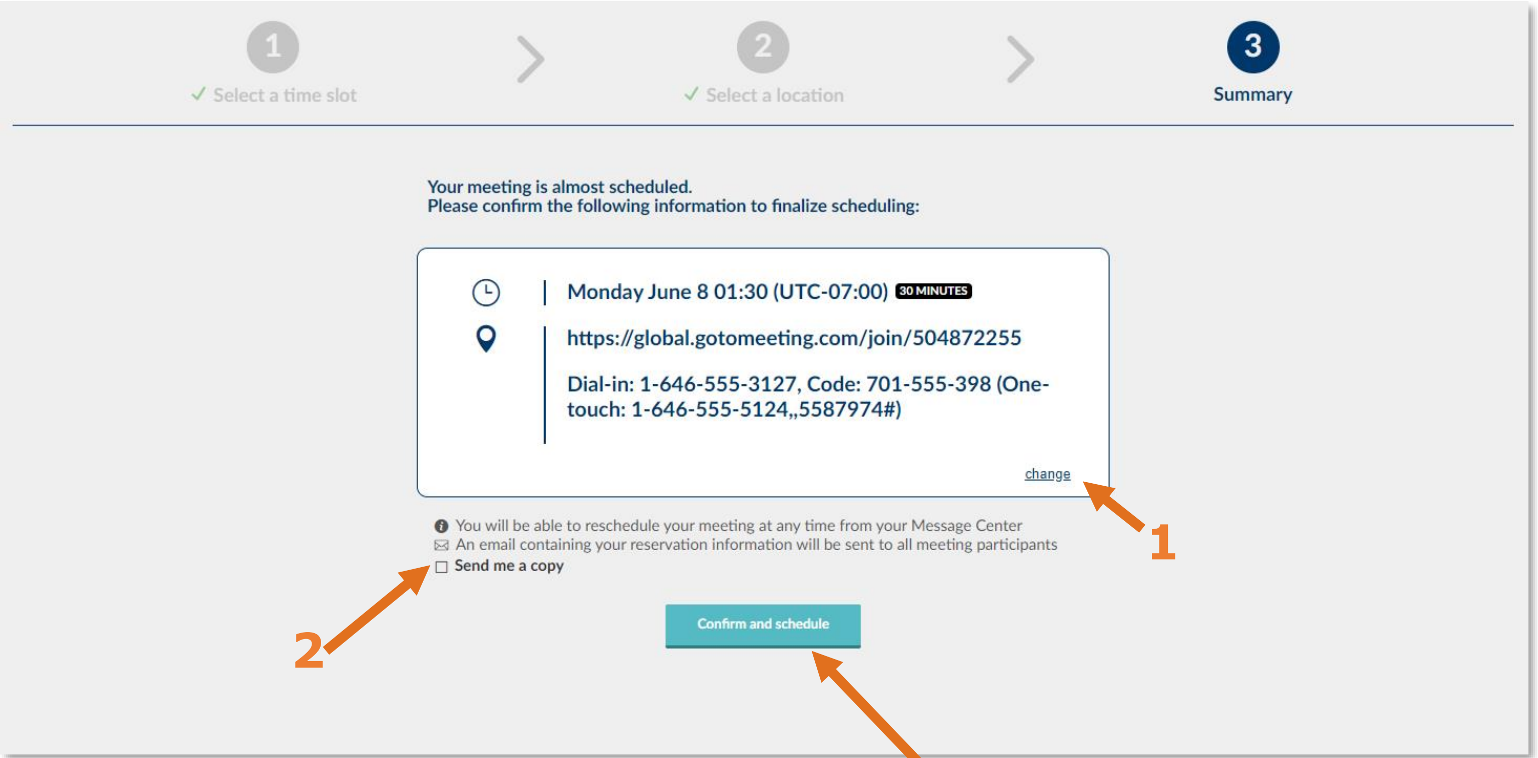


Links will be displayed in the message center, in the calendar, and on any external calendars

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

Summary of Meeting

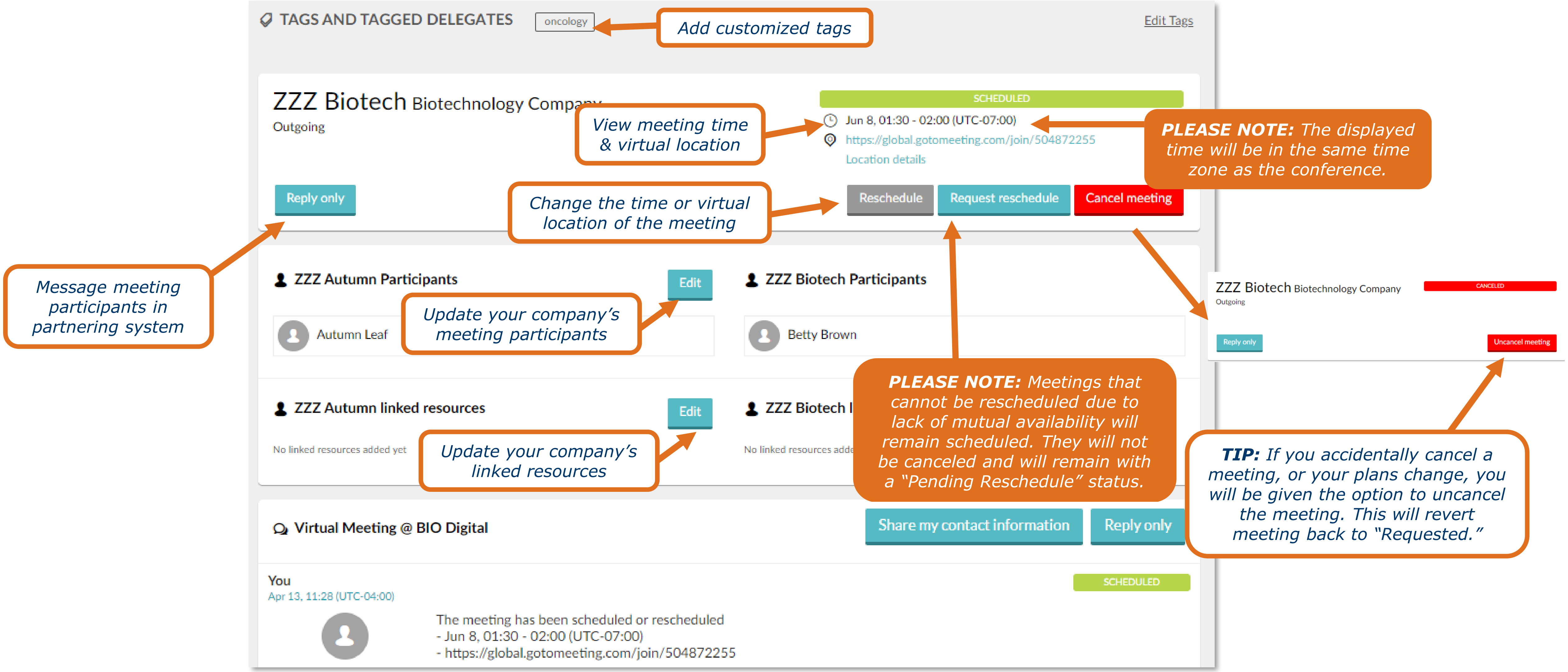
- After you have confirmed a meeting, you will be brought to the "Summary" page to review and confirm your meeting.
- Click "Change**"** (**1**) to go back to the previous screen to edit any of the meeting details.
- If you are scheduling a meeting for another delegate within your company, you can click 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

- Once a meeting has been scheduled, you can return to your Message Center at any time to update details of the meeting.



Contact Information

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