

## User Guide to HelloPartnering

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## Introduction & Log-In

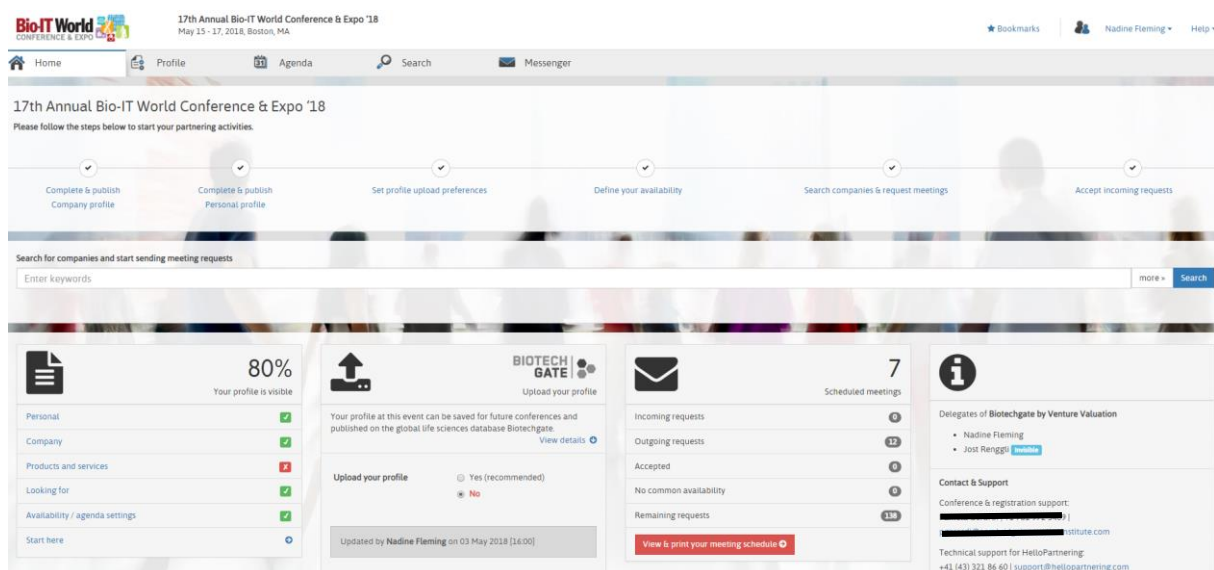
This document is an overview and guide of how to use and navigate the HelloPartnering platform from a user's/conference attendee's point of view. It will cover the necessary steps to complete a profile and agenda, as well as the use of all available features including the search & request function and messenger.

To login / access a conference:

1. Login by either clicking on the direct link provided by the conference organizer or sent by HelloPartnering ([support@hellopartnering.com](mailto:support@hellopartnering.com)) which will take you automatically to the conference's login page.  
**Alternatively** the applicable conference can be selected on [www.hellopartnering.com](http://www.hellopartnering.com) by clicking on "Partnering login" on the upper right corner.

**Recommendation:** We recommend to add "[support@hellopartnering.com](mailto:support@hellopartnering.com)" to the list of safe/approved emails (i.e. marking as "not spam") to avoid any HelloPartnering relevant communication ending up in the Junk/Spam folder.

2. Enter your email address and password<sup>1</sup> and click "Sign in" to access your account  
 Once logged in, you will see your dashboard/overview screen:



The screenshot displays the user's dashboard for the 17th Annual Bio-IT World Conference & Expo '18. The top navigation bar includes Home, Profile, Agenda, Search, and Messenger. A progress bar indicates the user's profile completion status: 80% visible. Below this, there are several widgets: a search bar for companies, a 'Biotech Gate' profile upload status widget showing 'Upload your profile' with 'Yes (recommended)' and 'No' options, a 'Scheduled meetings' widget showing 7 meetings, and a 'Delegates of Biotechgate by Venture Valuation' widget listing delegates like Nadine Fleming and Jost Renggli. The dashboard also includes a 'Contact & Support' section with conference registration support details.

<sup>1</sup> If you have forgotten your password, use the "Forgot password"-link below the password field.

If you haven't defined a password or don't have access yet, click on the "No access yet? Click to create your account"-link and follow the steps to get access.

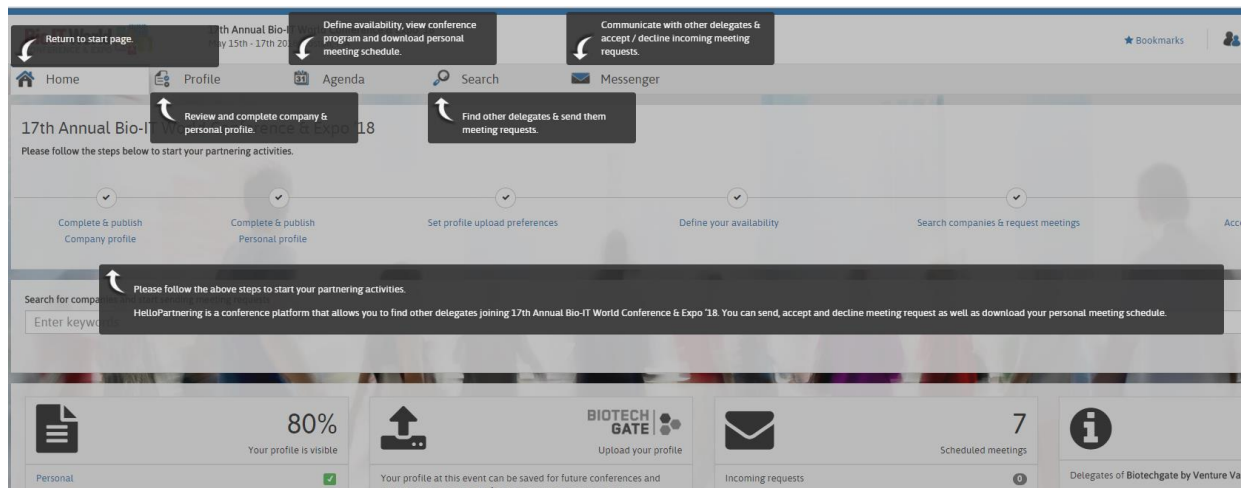
## Navigation & Help Feature

There is a simple way on finding out how to navigate through your HelloPartnering account: Clicking “Help” in the top right corner will open the available help options:

1. “Show navigation hints” & 2. “Show step-by-step wizard”

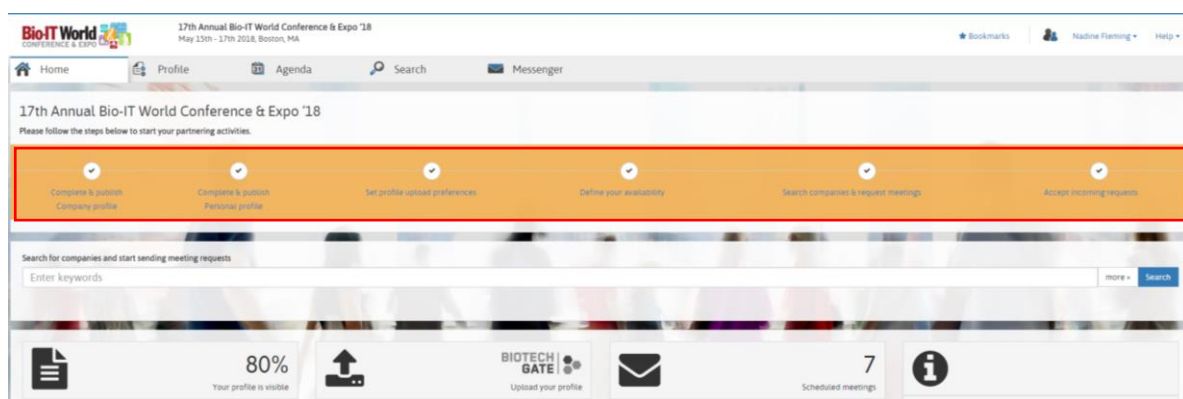
### 1. Show navigation hints

Clicking this will change the normal screen to the one below and explain which tab offers which feature/function.



### 2. Show step-by-step wizard

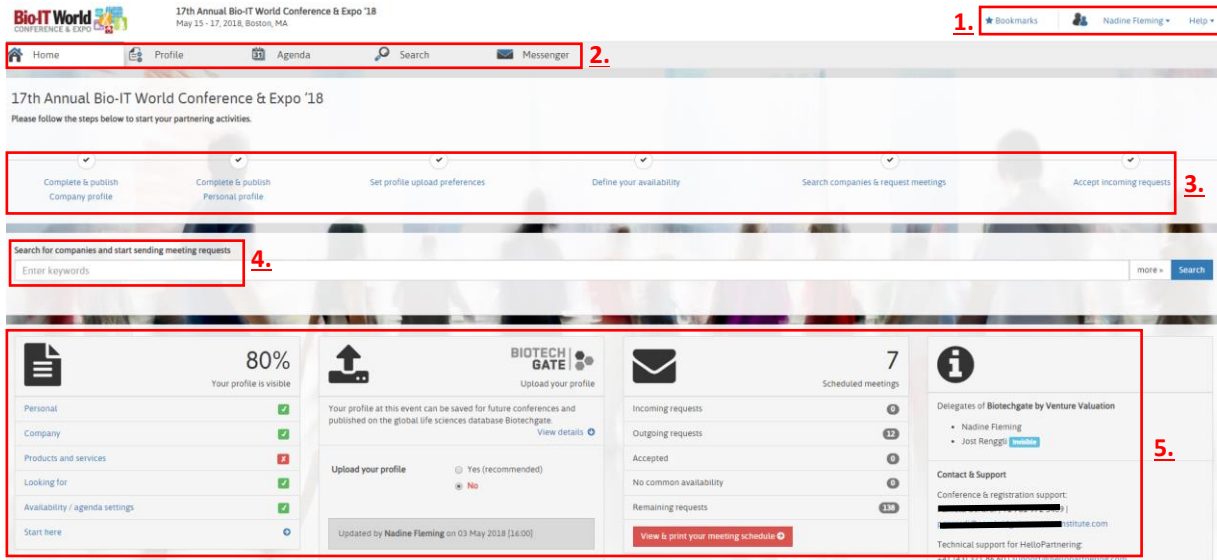
Clicking it will bring up all the steps that require completion prior to using HelloPartnering to request & accept meetings. The steps are highlighted in orange below and will inform you whether a step/section has been completed or not.



## Dashboard

The dashboard is the screen you land on after logging in and it offers access to every feature of your HelloPartnering account. Clicking on “Home” in the navigation panel on top will always take you back to this screen.

All features/sections are shown & explained below:



The screenshot shows the dashboard for the 17th Annual Bio-IT World Conference & Expo '18. The navigation bar at the top includes Home, Profile, Agenda, Search, and Messenger. A progress bar below the navigation bar shows the following steps: Complete & publish Company profile, Complete & publish Personal profile, Set profile upload preferences, Define your availability, Search companies & request meetings, and Accept incoming requests. A search bar is located below the progress bar. The dashboard is divided into several summary boxes: 1. Profile completion: 80% Your profile is visible, with links to Personal, Company, Products and services, Looking for, and Availability / agenda settings. 2. Biotech Gate: Upload your profile, with options for Yes (recommended) and No. 3. Meeting & Request overview: Incoming requests (3), Outgoing requests (12), Accepted (3), No common availability (0), and Remaining requests (138). 4. Information box: Delegates of Biotechgate by Venture Valuation (Nadine Fleming, Jost Renggli), Contact & Support details, and Technical support for HelloPartnering.

1. Bookmarks shortcut (you can bookmark other company and personal profiles), Log-Out & Help feature
2. Navigation panel for quick access to dashboard (**Home**), **Profile** (personal & company), **Agenda** (conference program and personal meeting schedule), **Search** (find companies, assets & other participants) and **Messenger**  
→ Details on each feature can be found in the relevant chapters further down
3. Step-by-step wizard showing the progress of your profile completion & activation in chronological order
4. Quick search function
5. Overview/summary boxes:
  - Profile completion in % with quick access to individual sections to complete/amend<sup>2</sup>
  - Opt-in or out to have your company’s profile saved for future conferences and also be published on the global life sciences database Biotechgate.
  - Meeting & Request overview showing incoming, outgoing, accepted & remaining requests, as well as accepted requests without mutual availability<sup>3</sup>
  - Information box showing other attendees from your company (if applicable) as well as Contact & Support details for this particular event

<sup>2</sup> It is not necessary to reach 100%; the percentage merely indicates how much information has been entered into the personal & company profile

<sup>3</sup> Every registered attendee has a specific amount of requests to send out by default; once a request has been accepted or declined by the other party, it will go back onto the balance of remaining requests.

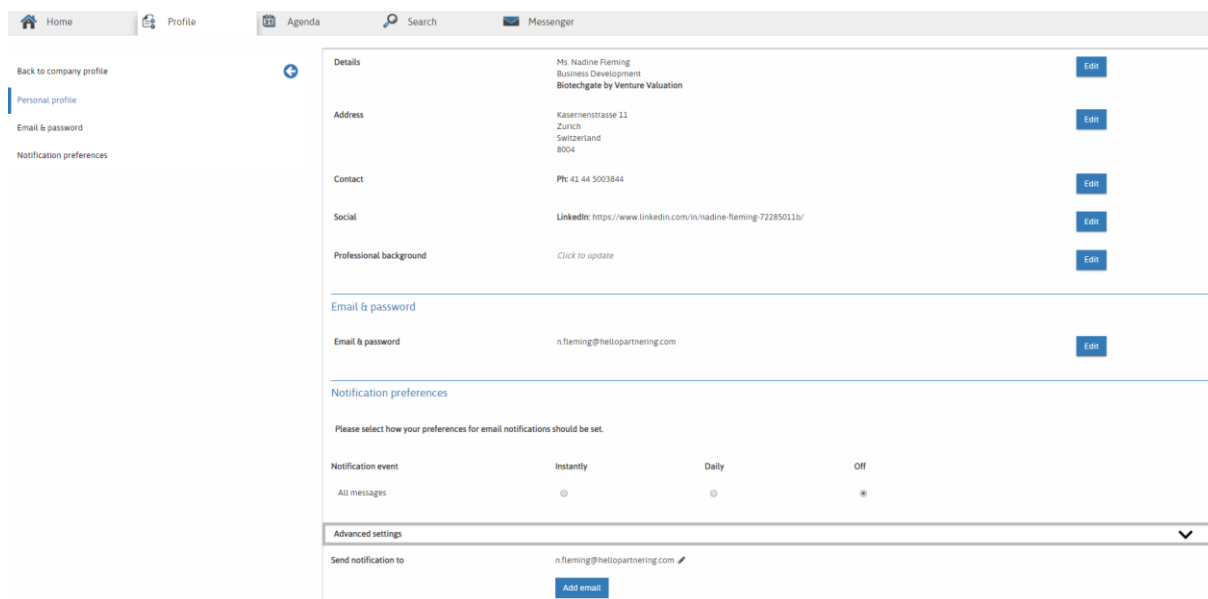
## Profile

Clicking on the „Profile“-tab at the top of the page will allow you to fill in details for two different types of profile: 1) **“Personal profile”** and 2) **“Company profile”**; this section also features the option to 3) publish a profile for partnering activities and 4) to import your profile from Biotechgate or a previous conference you’ve attended and used HelloPartnering.

### 1) Personal Profile

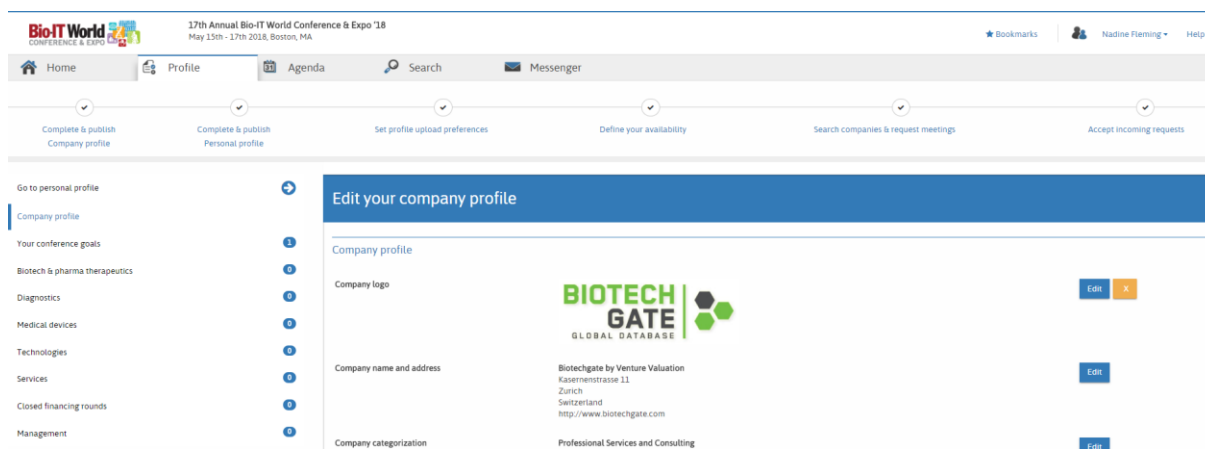
In this section you can add personal information such as a link to a social media profile (e.g. LinkedIn, etc.) or a professional background.

In addition to that you can also change your password and set your notification preferences and frequency for any new requests, messages and meetings.



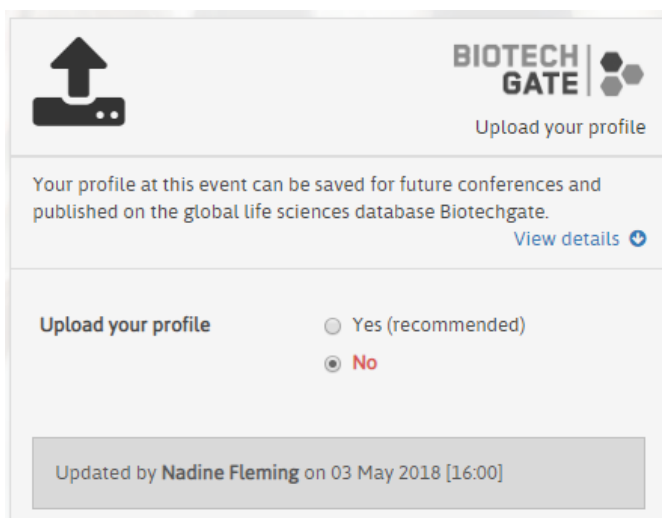
### 2) Company Profile

Any information regarding your organisation as well as your organisation’s conference goals can be entered.<sup>4</sup>



<sup>4</sup> The available sections to enter company information vary as they depend on the type of conference.

- 3) Publishing<sup>5</sup> your profile (making it “visible”) after providing as much company and personal information as you wish is essential & mandatory if you want to use the partnering features of HelloPartnering: being visible allows you to send out meeting requests/messages as well as receiving them as it enables other participants to “find” you through the search function. If your profile is not published yet, simply click the “Publish profile”-button on top of the profile page.
- 4) You can choose to import your profile from a previous conference you’ve attended/used HelloPartnering (if this had been enabled by you), or import your company’s profile from the Biotechgate database. You have the option to enable this throughout the process of completing your personal and company profile or alternatively there is a quick access from the dashboard:



The screenshot shows a web form titled "BIOTECH GATE" with a sub-header "Upload your profile". It includes an upload icon, a text box with a "View details" link, and radio buttons for "Yes (recommended)" and "No". A footer indicates the form was updated by Nadine Fleming on 03 May 2018 at 16:00.

**BIOTECH GATE**  
Upload your profile

Your profile at this event can be saved for future conferences and published on the global life sciences database Biotechgate.  
[View details](#)

Upload your profile  Yes (recommended)  No

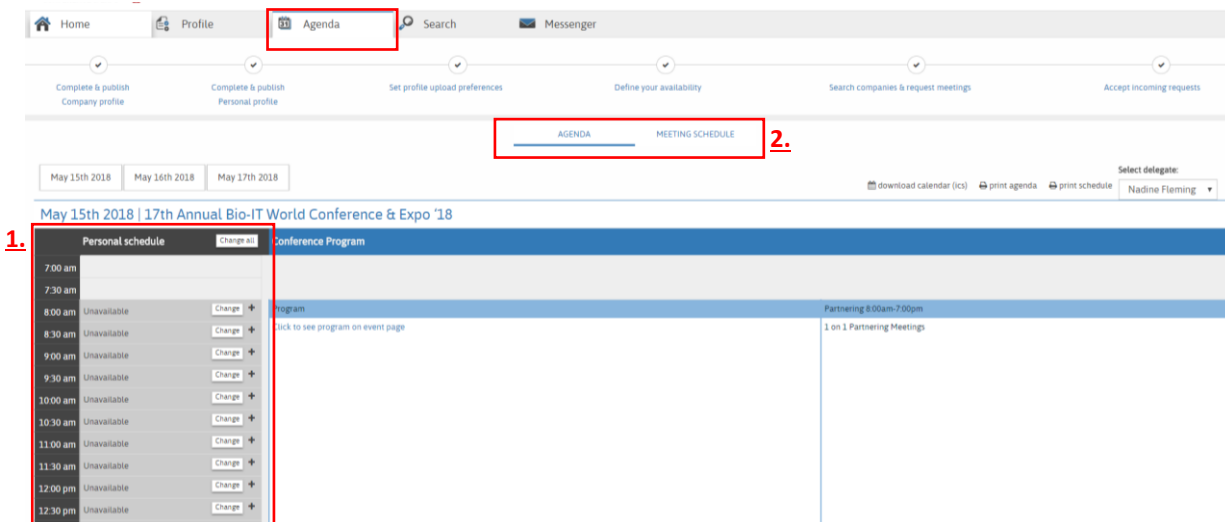
Updated by Nadine Fleming on 03 May 2018 [16:00]

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<sup>5</sup> Your profiles (personal & company) may already be visible/published when you first log-in; this varies from event to event but prior notification would’ve been included in any initial HelloPartnering related communication. You can still set your profile to invisible should you not wish to participate in any partnering activities.

## Agenda & Meeting Schedule

The “Agenda”-section will show you the event’s schedule & program for each day and allows you 1) to set your own availability/schedule for the entire duration of the conference (“**Personal schedule**”) and once the scheduling of meetings has started, this section also lets you 2) to view, print & download your **meeting schedule**.<sup>6</sup>



### 1) Personal Schedule

Setting your own availability can be done by selecting individual slots and either set to them to available/unavailable by clicking the “Change” button next to any slot. Alternatively the availability for an entire day can be changed by simply clicking “Change all”. Available slots are shown in green, unavailable slots remain grey.

Any slots marked as available will be used by the system to schedule accepted meetings; any unavailable slots will be left untouched and can be utilized by you as you wish (e.g. lunches, networking, other engagements, etc.).

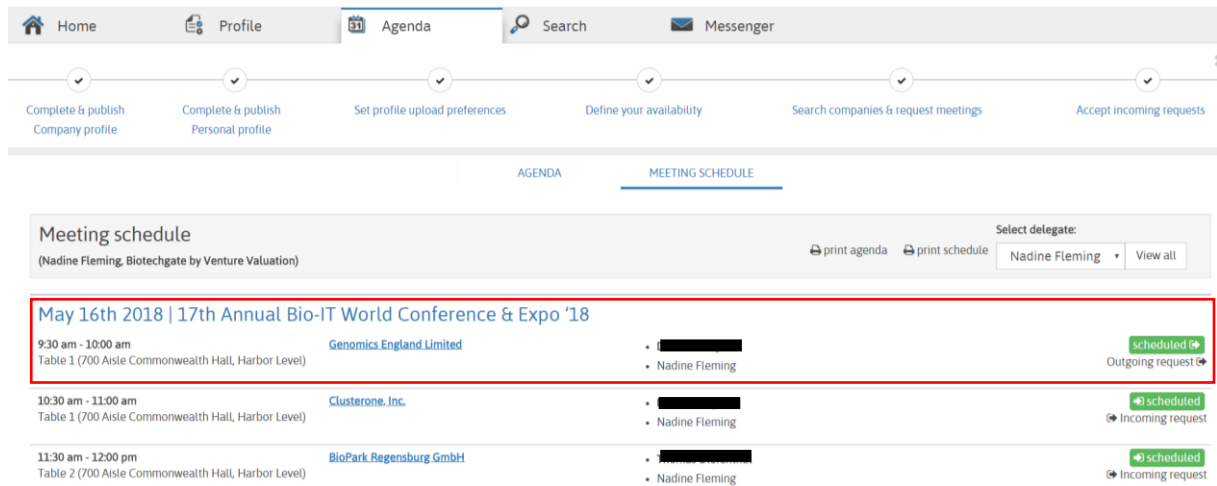
**Recommendation:** We recommend to have plenty of availability set over the course of the event to avoid any meetings not taking place due to missing and/or no mutual availability between the two parties.

<sup>6</sup> The Agenda can only be accessed and utilized once you’ve published your profile; otherwise a message prompting you to do so appears.

## 2) Meeting schedule

Once scheduling of all accepted meeting requests has started (usually between 1-2 weeks prior to the event), you can access your meeting schedule by clicking on the “Agenda”-tab and then “Meeting Schedule”. This section will also allow you to print the schedule as well as the event’s agenda or download into your calendar.

You will see all your scheduled meetings in chronological order; including the date, timeslot, location, company and delegate names. It also shows if this meeting is from an outgoing or incoming request. The location of each meeting will usually get added approx. 1 (business) day prior to the event.



The screenshot shows the 'Meeting schedule' page for Nadine Fleming at Biotechgate by Venture Valuation. The page includes a navigation bar with 'Home', 'Profile', 'Agenda', 'Search', and 'Messenger'. Below the navigation bar is a progress bar with six steps: 'Complete & publish Company profile', 'Complete & publish Personal profile', 'Set profile upload preferences', 'Define your availability', 'Search companies & request meetings', and 'Accept incoming requests'. The 'Meeting schedule' section is active, showing a list of meetings for 'May 16th 2018 | 17th Annual Bio-IT World Conference & Expo '18'. The first meeting is highlighted with a red box.

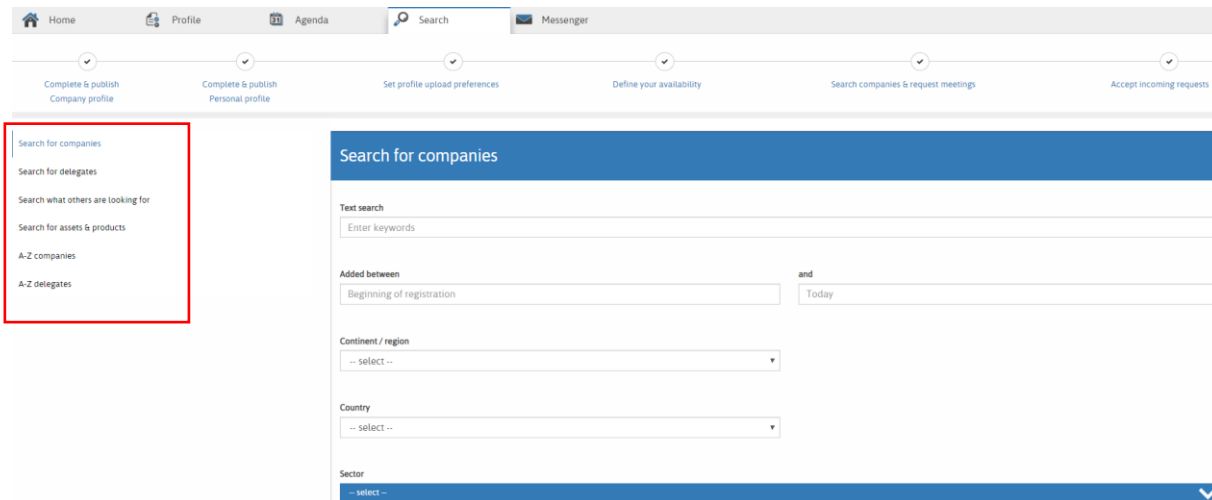
Time	Location	Company	Delegate	Status
9:30 am - 10:00 am	Table 1 (700 Aisle Commonwealth Hall, Harbor Level)	Genomics England Limited	Nadine Fleming	scheduled Outgoing request
10:30 am - 11:00 am	Table 1 (700 Aisle Commonwealth Hall, Harbor Level)	Clusterone, Inc.	Nadine Fleming	scheduled Incoming request
11:30 am - 12:00 pm	Table 2 (700 Aisle Commonwealth Hall, Harbor Level)	BioPark Regensburg GmbH	Nadine Fleming	scheduled Incoming request



## Search

The search page offers a variety of different search masks & filters which allow you to find the right companies and delegates to request meetings with and/or message.

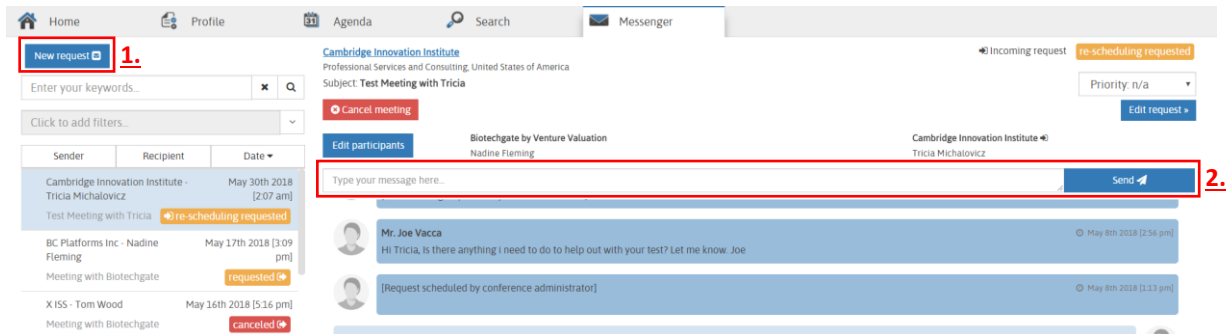
The search results will feature a company overview as well as the company's delegates for the event. Alternatively you can see a list of all companies and delegates in alphabetical order by simply clicking on "A-Z companies / delegates":



**Tip:** You can bookmark any company or delegate by opening their profile from the search results and then clicking the little "star" symbol next to their name.

## Messenger

The messenger is your tool to either 1) send out **meeting requests** to other companies/delegates for this event as well as accepting incoming requests or to simply 2) **message** another company/delegate (e.g. to discuss details prior to a meeting, etc.).

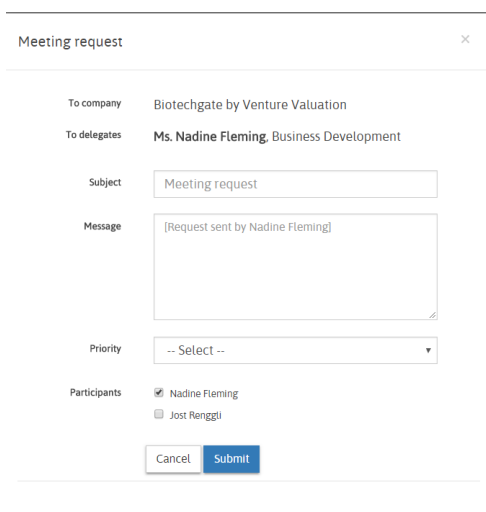


The page gives you an overview of all existing requests as follows:

- Color-coding indicates the status of a request:  
green = accepted/scheduled, orange = requested (i.e. it has neither been accepted nor declined by the other party yet) & red = cancelled/declined.
- A little symbol next to the status indicated if a request is outgoing (sent by you) or incoming (initiated by the other party)
- You can do a keyword search (on the left) through all your requests
- You can filter your requests by status (also on the left)

### 1) New request

To send a new meeting request, simply click on “New request” (top left); the following window will open:



Firstly select the applicable company from the drop down menu, then pick a delegate (if more than one is listed) and fill out the subject & message box.

Next choose your own company’s participants (if more than one is listed) and you can also select a priority for this request.

Finally click “Submit” to send your request to the other party; it will now show on your message overview as “requested”.

## 2) Send a message

To message a company/delegate, select the existing request from your list on the left and then type your message in the box above the request feed and hit “Send”.

The message will immediately show below in the message and action history for this particular request.

**Tip:** If you receive an email notification about a new message/request, you will have to log into your partnering account to reply/accept! A direct reply to the email you’ve received will not reach the other party. Instead click on the “Reply” button in the notification email which will lead you to the specific message in HelloPartnering.