



## **Idealist2018 Project**

Contract n° 645216

# **Ideal-ist Face2Face Brokerage Event Guide**

Informal internal support document

**Restricted**

**Version 1.0**

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**Section 0. Change control**

<i>Version</i>	<i>Type</i>	<i>Date</i>	<i>Author</i>	<i>Organization</i>
0.1	First draft	15 May 2018	Edina Nemeth	INNOREG KM RIU
1.0	Second draft	15 Nov 2018	Edina Nemeth	INNOREG KM RIU

**Change History**

- 0.1 is the initial draft based on past events' guides with updates of screenshots, links, and additional information of relevance to the current year's event
- 1.0 update on how to book meetings

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## Section 2. Introduction

The Ideal-ist Face2Face brokerage event will be organised as a part of [ICT 2018](#) on 4-6 December 2018 in Vienna, Austria. As in the past, Ideal-ist, the network of national contact points (NCP) for information and communication technologies (ICT) in Horizon 2020 is organising the event in cooperation with the Enterprise Europe Network (EEN).

For such events, two systems are being used simultaneously:

- The European Commission's (EC) event system
- The b2match brokerage system

Participants often confuse the registration steps, profiles, and other functionalities available on the two different systems, therefore this guide provides step-by-step screenshots of each system, to help you understand the networking opportunities each provides, and identify which system and which step a participant may need support with (Please see [Annex 1](#), [Annex 2](#), and [Annex 3](#) for details).

### 2.1 B2Match system

Ideal-ist is using the b2match system to support the Face2Face brokerage event. In 2018 a new version of b2match is being used for ICT 2018.

#### 2.1.1 Front end

The brokerage event site **front end** is available here:

<https://ict2018.b2match.io> and <https://ict2018.ideal-ist.eu> (TBC)

All participant profiles, project ideas, and other cooperation offers are available online publically.

#### 2.1.2 Back end - administration

However, if you would like to support participants directly by editing their profile, you need to access the administrative pages. **Administrative pages** for NCPs are available here (all NCPs are added to the system):

<http://admin.b2match.com>

You can edit the profiles of all participants from your country, by logging in to the system through admin pages.

If you need more information about how the b2match system works, please see the [online help](#), or contact the event team (Ideal-ist: Edina Nemeth. EEN: Thomas Röblreiter).

### 2.2 Participant Registration

**No direct registration** on the brokerage event (b2match) page is possible for participants. This is to ensure, that all participants register and get badges for the main event, ICT 2018.

**Registration steps** (see screenshots in [Annex 1](#)):

1. First register for [ICT 2018](#) on the EC site.
2. When logged in, click on "[My Event](#)".
3. Click on "Participate in the [Ideal-ist face2face brokerage event at the ICT 2018 event](#)".
4. Click on "[Take me to the Ideal-ist face2face brokerage event registration page now](#)".
5. You will be transferred to the b2match registration.

Participants who have used b2match in the past may already have an account set up.

- If they already have an account, they can login with their credentials (or ask for a password reset)
- If they do not have an account yet, they need to set one up, and confirm their account registration

Following this, they can set up their profile, specific to the ICT 2018 face2face brokerage.

Here is a summary of the type of accounts a participant has, and the type of information included within such accounts, to help you identify, in which system, and where a participant may need help.

ICT 2018	Account	<p>This is set up in the DG CNECT system, and can be used to register for events used by DG CNECT.</p> <p>This includes general information: name, email, login, organisation, description, country, website, social media accounts, picture</p> <p>It can be accessed through "Edit your registration information" page of the EC ICT 2018 event</p>
	Event profile	<p>This is the registration for a specific event, like ICT 2018</p> <p>This includes your participation details, such as dates, exhibitions or sessions you organise, and the possibility to submit a <b>presentation for a work programme session</b> (by 3 Dec, see Figure 1)</p> <p>It can be accessed through "My event" page of the EC ICT 2018 event</p>
Face2Face Brokerage (B2match)	Account	<p>The account can be set up and used to register for any brokerage events using the b2match system.</p> <p>This includes general information: email, password and the list of events you participated at.</p> <p>It can be accessed after logging in and visiting the following page: <a href="https://ict2018.b2match.io/my/account">https://ict2018.b2match.io/my/account</a></p>
	Event profile	<p>This profile is used to feature a person participating at a specific brokerage event, for example the Face2Face brokerage at ICT 2018.</p> <p>This includes general information: name, telephone, position, organisation (name, description), picture, logo, country, address, <a href="#">agenda</a>, meetings.</p> <p>It also includes event-specific information as attendance (availability), <b>areas of activity</b> (e.g. ICT topics, see Figure 2 below)</p>
	<a href="#">Marketplace</a>	<p>This is event specific. You can add the following type of information about the type of cooperation you are looking for (see Figure 3 below):</p> <ul style="list-style-type: none"> <li>• <b>Product</b></li> <li>• <b>Project cooperation</b></li> <li>• <b>Investment</b></li> <li>• <b>Expertise</b></li> <li>• <b>Request</b></li> </ul>

As ICT 2018 addresses (nearly) **all ICT topics in Horizon 2020**, the Face2Face brokerage is also giving the opportunity to participants to choose from all ICT topics.

**Important note:** EC sessions and presentations in the work programme track will focus on 2019 topics, later topics may not be presented.

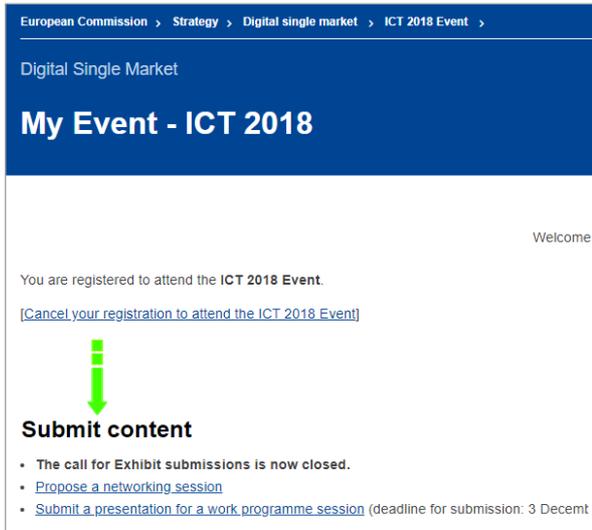


Figure 1: Adding a presentation to a work programme session

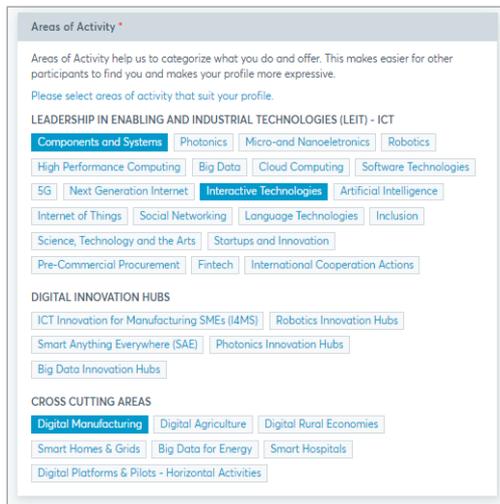


Figure 2: adding areas of activity to profile

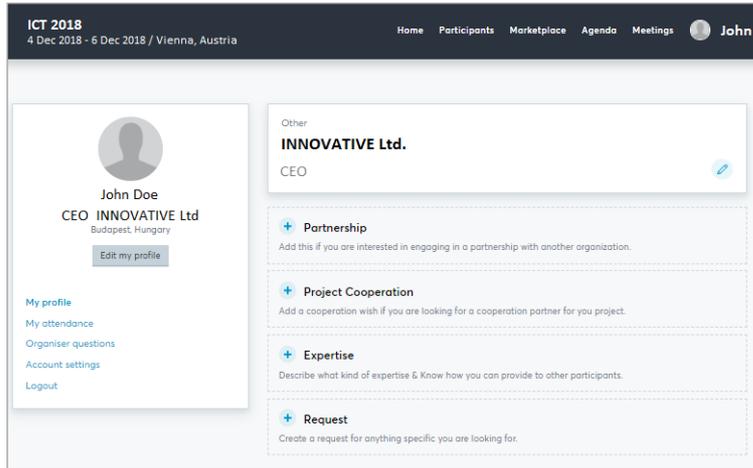


Figure 3: Adding cooperation offers/requests to marketplace

### Section 3. Quick start guide

Participants who register for the brokerage are **immediately and automatically published on the b2match** site. All registered participants' NCPs have access to the profiles from their country, and, if needed can offer support to proposers in order to ensure good quality organisation profiles and cooperation profiles, and thus higher chances for well-targeted meetings.

The main process remains similar at each Ideal-ist event, however, there are some important differences **depending on the availability of the work programme**:

- Organisation profiles should be checked according to [section 4.1](#).
- In years of work programme publication (when it becomes available only shortly before the event), **project cooperation offers** in the **marketplace** ideas should be checked following proposers' having a chance to tailor them to work programme content (see [section 4.2](#)).
- In second (or later) years following the publication of the work programme, **project cooperation offers** in the **marketplace** should be checked throughout the registration period (see [section 4.2](#)).

**NCPs are the main contact for proposers** from their country.

All NCPs (listed on the Ideal-ist representatives' page) are registered as co-administrators in the system. NCPs of a given country will **no longer receive automatic notification** when participants from their country, even if such an option is selected in their profile.

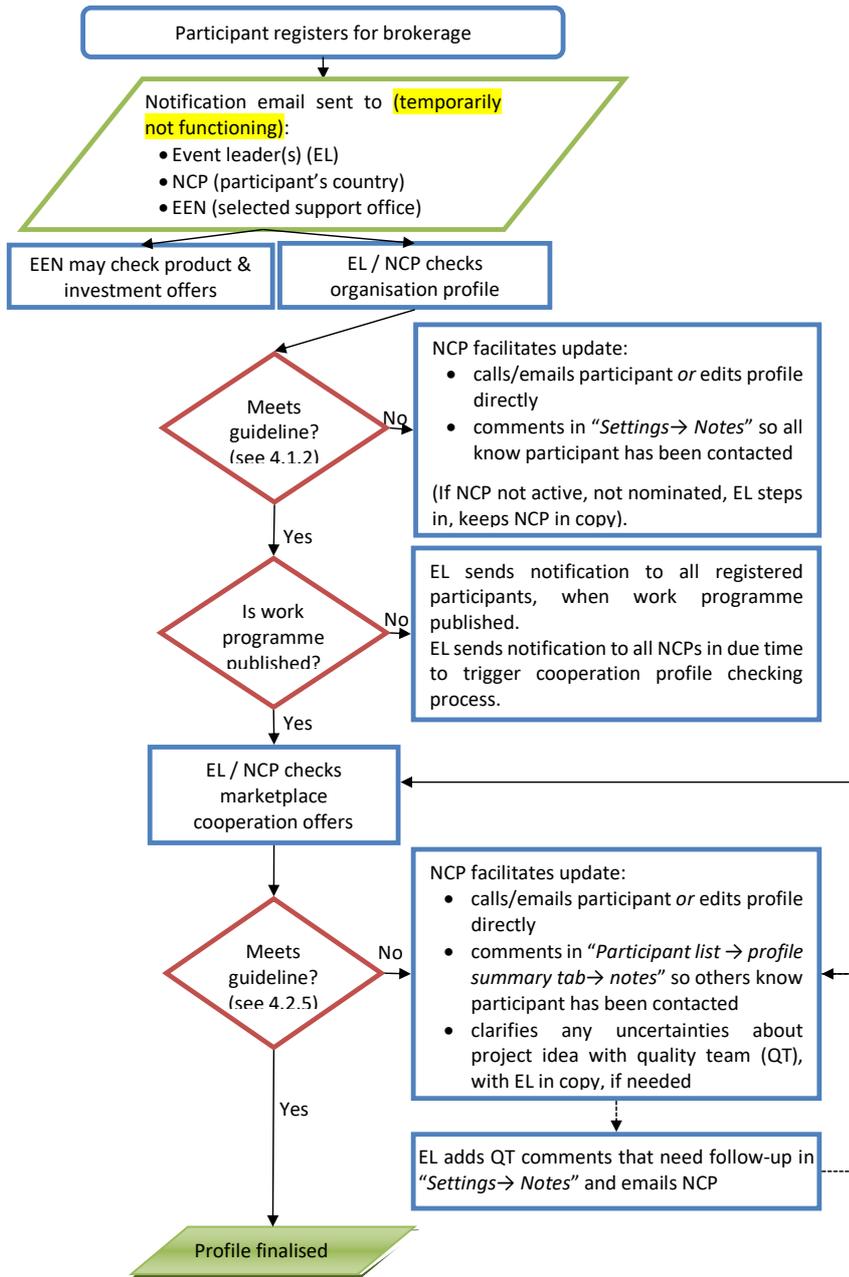
**(Please note: this is a temporary situation, as the new version of b2match does not yet include this functionality for events, that require registration for a main event as a first step.)**

As the event approaches, NCPs can use this as a chance to get in touch with proposers and advise them on how to best prepare for participation at the event.

- **NCPs** are responsible for:
  - Contacting participants registered for the main event, but not yet registered for the brokerage to invite them
  - Checking organisation profiles and giving feedback for improving them (see [section 4.1](#))
  - Checking marketplace entries (project cooperation and expertise offers) and giving feedback for improving them (see [section 4.2](#))
  - Contacting the quality team, in case there is a question regarding the suitability of H2020 project ideas ([#t4\\_1\\_proposers](#) on slack, with event leader(s) mentioned in the form @name\_of\_event\_leader)
- The **event team** will be responsible for
  - Sending centralised messages to registered participants when important information / system functionalities become available (work programme publication, event agenda publication, meeting selection period, Ideal-ist activities at the event)
  - Periodically checking profiles, and sending centralized messages to participants to update parts of their profiles (e.g. availability, adding project ideas)
  - Reminding NCPs in cases, where proposers are not responding and improvements are required
  - If the NCP is away, inactive, or is not nominated for a particular country, the event team may take over the tasks for that country

- **EEN** may also contact participants to offer advice on innovation offers/requests that are outside the scope of Horizon 2020, and inform participants about their services for Horizon 2020 (such as services for SME Instrument beneficiaries) or beyond Horizon 2020.

**Section 4. Process flowchart**



**4.1 A – Participant profiles with only organisation profile**

**4.1.1 Process overview**

(while notifications are not functioning, in lieu of the tasks described in this section, centralised mails will be sent out to remind participants of key information needed)

Organisation profiles will be immediately published on the b2match site. Nevertheless, NCPs should check profiles, to ensure they are complete and contain a sufficient level of detail for meaningful meetings periodically as the event date approaches:

- When a participant registers, an automatic notification email will be sent to (this functionality is temporarily not working):
  - Event leader(s)
  - NCP(s) in the country of the participant
  - Selected EEN support office
- EL / NCP(s) should check organisation profile:
  - **if profile is suitable:** no further action needed
  - if profile needs improvement:
    - recommendations should be communicated to proposer (via phone or email)
    - EL / NCP(s) can make a note to describe action taken/needed in the future (e.g. date of contact, email/phone, response, recommendations given). This can be done in the system as follows: (1) go to the participant list; (2) click the participant; (3) on the right hand side profile panel, click on “notes”;
- EL centralized mails and NCP(s) in discussions should recommend that participants enhance visibility by inserting cooperation interests in the marketplace (cooperation project ideas, expertise offers and requests (see recommended text in email template in [Annex A.4.1](#)))

Good organisation profiles, relevant to the ICT work programme offer:

- better chances for well-targeted meetings, and
- better chances for involvement in good proposals.

**4.1.2 Checklist for organisation profiles**

(Many fields are mandatory. In the following optional fields, please check that sufficient level of detail is included, to be selected for meetings)

ORGANISATION PROFILES		
✓	Organisation description	Brief summary of company activities, e.g.: - In general - Framework programme experience
✓	Participant	<i>Highly recommended:</i> picture, for better chances of recognition at meetings
✓	Participant	Mobile phone number is requested so we can reach participant during the event for changes, cancellations
✓	Areas of activity	Should select at least one Horizon ICT area

## 4.2 B – Participants who enter cooperation interests on the marketplace

### 4.2.1 Process overview

(while notifications are not functioning, in lieu of the tasks described in this section, centralised mails will be sent out to remind participants of key information needed)

- When a participant registers, an automatic notification email will be sent to: (this functionality is temporarily not working):
  - Event leader(s)
  - NCP(s) in the country of the participant
  - Selected EEN support office
- If profile(s) are suitable: no further action needed.
- if profile(s) need improvement:
  - NCP(s) can make a note to describe action taken/needed in the future (e.g. date of contact, email/phone, response, recommendations given). This can be done in the system as follows: (1) go to the participant list; (2) click the participant; (3) on the right hand side profile panel, click on “notes”;
  - In case of uncertainties with respect to a Horizon 2020 project idea or expertise profile, NCP(s) can contact the quality team ([#t4\\_1\\_proposers](#) on slack, with event leader(s) mentioned in the form @name\_of\_event\_leader).
  - Event leader can log recommendations of quality team in the “notes” tab described above.
  - NCP(s) should pass on recommendations to proposer.

Good cooperation offers on the marketplace, relevant to the ICT work programme offer:

- better chances for well-targeted meetings, and
- better chances for involvement in good proposals

### 4.2.2 Check list for cooperation offers on the marketplace

In the new b2match the cooperation offer types and their content have been simplified, and now offered on the “marketplace”. There are several types of cooperation offers available for ICT 2018:

- Product
- Project cooperation
- Investment opportunity
- Expertise
- Request

Each cooperation offer type has only a small number of fields to be filled in: title, description, and a selection of tags (e.g. topics) to select. In past editions of b2match, this interface was customised, to offer fields where important information was added (e.g. call topics, project types), however, there are currently no such fields available.

Where possible, the **presence of information important for Horizon 2020** (e.g. call topic, project type) **should be encouraged** in the selection of tags and the description text.

NCPs (and event leader(s)) should check that sufficient level of detail is included, to be selected for well-targeted meetings.

#### Checklists:

COOPERATION OFFER ON MARKETPLACE		
Expertise		
✓	Topic	- Which Horizon 2020 ICT areas is it addressing (if relevant)? The relevant tag can be selected, plus a specific a call topic identifier can be included in the description
✓	Description	- Is description relevant to the selected ICT areas? - Is there sufficient detail provided for matchmaking, e.g. <ul style="list-style-type: none"> <li>- brief description</li> <li>- potential application area</li> <li>- work programme topic(s) (if relevant)</li> <li>- innovative aspects</li> <li>- target partner sought</li> </ul>

PROJECT COOPERATION		
✓	Work Programme Topic	- Which Horizon ICT (or other) topic is it addressing?
✓	Type of Project	- Research & Innovation Action (RIA), Innovation Action (IA), PCP, CSA, etc.
✓	Project objectives	- Clear statement of objective - Target technical outcome(s) - Target socio-economic impact(s)
✓	Wanted	- Competences & skills wanted (e.g. technical, design, coordination, writing etc.) - Type of partner sought (e.g. industry, SME, RTD centre, university, user-groups, etc.) - Work to be performed (e.g: prototyping, programming, system integration, dissemination, engineering, etc.)
✓	Participant's skills	- Description of participant's skills, competences and expertise relevant to the project idea

OTHER (NON-HORIZON 2020 ICT) RELATED COOPERATION OFFERS (e.g. product, investment)		
✓		EEN uses own quality criteria

#### 4.3 Additional steps to prevent incomplete profiles

- Ideal-ist event leader(s) will proactively check profiles bi-weekly (or more frequently, if needed, as the event date approaches)
- Event leader(s) will notify NCPs who have many registered participants who are not responding to centralized notifications and therefore need personal attention (if the event leader(s) contacts participants directly, NCP will be in copy and/or interactions will be logged in "notes" box)

#### 4.4 Profile checking: step-by-step

0. Go to participant list and click on the orange “My participants” button ([Screen 1](#)).
1. Click on “Edit” icon next at the end of the line of each participant ([Screen 1](#)).
2. You can get a quick view of the main information in the participant’s profile, if you click on the line for the participant.

In this quick view, you can also add notes, to log your interactions with the participants, and the recommendations you have made for them ([Screen 1a](#)).

3. Check information provided on each profile tab ([Screen 2a](#)).
  - a. **Profile – General information** (e.g. organisation name, website, description) can be edited on the top part of this page. You may also find out, if the person is interested in receiving more information about Ideal-ist and NCP services.

Participants should provide a **meaningful description of their organisation** for the event.
  - b. **Profile – Marketplace items** (e.g. project cooperation, expertise, product, etc.) can be added and/or edited here. See guidelines on recommended content in Chapter 4.2.2. The most important cooperation offers with respect to Horizon 2020 are:
    - **Project cooperation:** Does the participant have a Horizon 2020 project idea, for which they are seeking partners? Please make sure the participant specifies the work programme topic (and part of the topic targeted, if relevant), as well as the type of project. Please make sure the idea is in line with the work programme expectations. Please make sure there is sufficient level of detail on the types of partners they are looking for. If you are in doubt, feel free to ask the quality team ([#t4\\_1\\_proposers](#) on slack, with event leader(s) mentioned in the form @name\_of\_event\_leader).
    - **Expertise:** Does the participant want to offer expertise for specific Horizon 2020 topics? Please make sure the participant sufficiently describes their expertise and past experience in the area. If possible, the participant should specify Horizon 2020 topics where this expertise is relevant.
  - c. **Attendance** ([Screen 2b](#), middle): Please make sure at least one time slot is selected! If the participant doesn’t indicate any **availability**, he/she cannot book meetings.
  - d. **Meetings:** this page lists the meetings requested by participants, as well as the meetings requested from participants by others. The meetings are set to “accepted” by default. For large events, in order to maximize the number of meetings, event leaders will schedule the meetings a few days prior to the event on the basis of the meetings requested.

If your participant has no meetings, you can remind the participant that he/she can request meetings.
  - e. **Settings:** here you can see if an organisation selected a support office (this is typically relevant for EEN, as they work regionally, whereas NCPs – having responsibilities nationally - are assigned all participants from their country by default).
  - f. **Activities** ([Screen 2c](#)): this page is for information. You can follow the important steps the participant has taken within the system, such as registration and meeting booking.
4. You can help participants edit further information, if you login as the user.

- a. **Login as User** If you are helping the user navigate and change information, you can click on the “Login as User” button, to see what the user sees.
- b. **Edit my profile:** when logged in as a user, basic profile information can be edited, such as the name, job position, telephone number, profile picture, organization (name, description, logo), country, address, areas of activity.

Encourage participants to add their **profile picture** to ease recognition, as well as a **mobile** number for easy contact at the event.

**Areas of activity:** participants should indicate Horizon 2020 topics of interest to them.

- c. **Cancelling participation:** if a user wants to cancel participation, you can use the “Login as User” button, go to the “Attendance” page, and click on “CANCEL PARTICIPATION” (in red).

(Please note: participants are reminded via central emails of the need to cancel, if they are not able to participate).

**Important:** For all cooperation offers, participants should use **descriptive texts** with important **key words**, in order to ensure their profiles end up in **search results**.

## 5. Feedback to participants

### ORGANISATION PROFILE CHECK

- a. Organisation profile **is complete**
  - **Notes:** Leave comment with date, name, and short description (e.g. 15.07 – Jane Doe checked profile)
- b. Organisation profile is **NOT** complete
  - Prepare e-mail to participant (see email template in [Annex A.4.1](#))
  - **Notes:** Leave comment with date, name and short description to ensure all are aware of current status of profile and follow up measures completed so far (e.g. 15.07 – Jane Doe asked participant for photo, better org description)
- c. If you think a profile needs to be deleted, please contact the event leaders.

### COOPERATION OFFER CHECK (Project cooperation, expertise)

- d. Cooperation profile is **NOT** complete or – in case of projects – not in line with the ICT work programme
  - Prepare e-mail to participant (including feedback from quality team, if feedback was requested) (see email template in [Annex A.4.2](#) for project ideas and [Annex A.4.3](#) for expertise)
  - **Notes:** Leave comment with date, name and short description to ensure all are aware of current status of profile and follow up measures completed so far (e.g. 15.07 – Jane Doe asked participant to align project idea to ICT WP)
- e. If you think a profile needs to be deleted, please contact the event leaders.

### Annex 1. Matrix of functionalities on the EC event website and/or Face2Face b2match

The following matrix provides an overview of the main functionalities and networking opportunities offered by the EC event website and/or b2match. Please note, that certain functionalities are available separately on the two websites (e.g. profiles, project ideas) and have to be entered separately on the two websites. Therefore, someone who does not want to engage in Face2Face meetings through b2match, can still present a profile on the EC website.

	EC event system	Face2Face b2match brokerage system
Registration*	<a href="#">Step 1</a>	<a href="#">Step 2</a> available through the EC system on <a href="#">My event</a> page, by clicking "Participate in the " <a href="#">Ideal-ist face2face brokerage ....</a>
Registration confirmation mail from	<a href="mailto:CNECT-ICT2018@ec.europa.eu">CNECT-ICT2018@ec.europa.eu</a>	<a href="mailto:noreply@b2match.io">noreply@b2match.io</a> <b>TEMPORARILY NOT FUNCTIONING</b>
Profile (person, organisation)	✓ ( <a href="#">log in</a> , edit registration info)	✓ ( <a href="#">log in</a> or use autologin links sent by email)
Photo	✓	✓
Logo		✓
Possible partner for WP topic	Not available this year	✓ submit an expertise offer in the marketplace
<a href="#">Presentation for WP topic/session</a>	✓	
Project idea for WP topic/session	Not available this year, submit presentation instead	✓ submit a project cooperation offer in the marketplace
<a href="#">Marketplace: Cooperation offer(s)</a>	Expertise	✓
	Project cooperation	✓
	Investment	✓
	Product	✓
	Request	✓

\* Please note: all links shown in the table above are accessible **only** if a participant is logged into the given system.

## Annex 2. Registration process on EC event site – for your information

These are the steps participants need to take to register for ICT 2018 on the EC website, and then to the Face2Face brokerage. You can send these instructions to participants having questions/problems.

### Registration step 1:

Go to ICT 2018 on the EC website:

<https://ec.europa.eu/digital-single-market/en/events/ict-2018-imagine-digital-connect-europe>

Click on

“Register & Attend >”



European Commission > Strategy > Digital Single Market > News >

Digital Single Market

EVENT | AUSTRIA CENTER VIENNA, BRUNO-KREISKY-PLATZ 1, 1220, WIEN | 4 December 2018 to 6 December 2018

## ICT 2018: Imagine Digital - Connect Europe

ICT 2018 will take place in Vienna on 4-6 December 2018. This research and innovation event will focus on the European Union's priorities in the digital transformation of society and industry. It will present an opportunity for the people involved in this transformation to share their experience and vision of Europe in the digital age.



In an open and participatory event, organised by the European Commission and the [Austrian Presidency](#) of the Council of the European Union, citizens can join science community members, policymakers, and fellow ICT-enthusiasts to discuss the future in a digital Europe.

[Register & Attend >](#)

### Explore ICT 2018

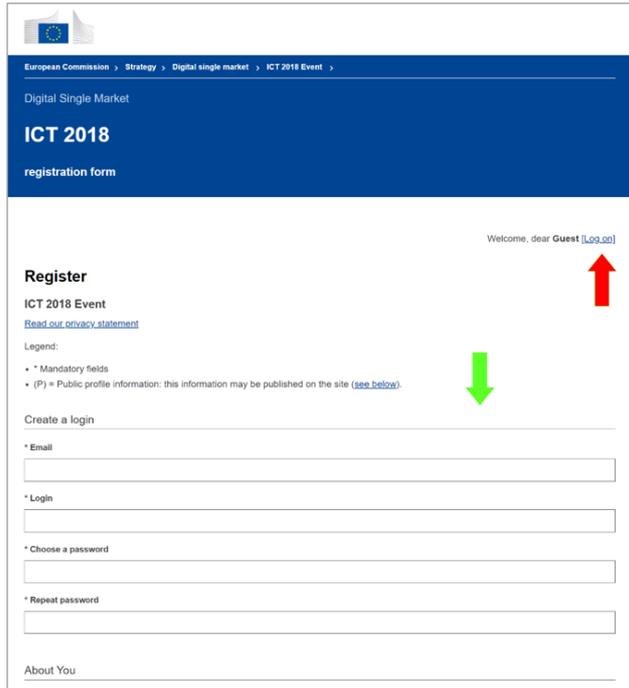
ICT 2018 will have four main components converging around the theme *Imagine Digital – Connect Europe*: Conference, Exhibition, Networking opportunities and Innovation and Startups forum.

**Registration step 2:** Register or log in.

You should be on this page:

<https://ec.europa.eu/digital-single-market/events/cf/ict2018/register.cfm>

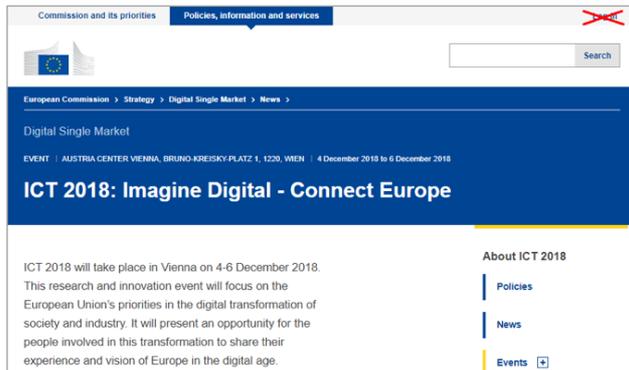
If you have already registered, click on “**Log In**” or “**Log on**” on this page



**Please note:**

Participants who are already registered may try to login via ECAS on the main event website (first link above, crossed out with red X).

**This will not take them to the event page.** Please be sure they log in through the registration page above.



**Registration step 3:**  
Click on “My Event”

The screenshot shows the 'ICT 2018 registration form' page. At the top, there is a breadcrumb trail: 'European Commission > Strategy > Digital single market > ICT 2018 Event >'. Below this, the page title is 'Digital Single Market ICT 2018 registration form'. A welcome message reads: 'Welcome, John SMITH [Log out] [My Event] [Back office]'. The main heading is 'Edit your registration information'. Underneath, it says 'ICT 2018 Event' and provides a link to 'Read our privacy statement'. A legend indicates that fields with an asterisk are mandatory and that (P) denotes public profile information. There are two input fields: 'Your login' (containing 'john.smith@abc.com') and 'Login' (containing 'john').

**Registration step 4:**  
Click on link marked with green arrow

The screenshot shows the 'My Event - ICT 2018' page. The breadcrumb trail is 'European Commission > Strategy > Digital single market > ICT 2018 Event >'. The page title is 'Digital Single Market My Event - ICT 2018'. A welcome message reads: 'Welcome, John SMITH [Log out] [My Event]'. The main content states: 'You are registered to attend the ICT 2018 Event.' and provides a link: '[Cancel your registration to attend the ICT 2018 Event]'. It then explains that to access the event, a confirmation email is needed, sent to 'john.smith@abc.com'. It offers a link to 'Please send it again.' and provides instructions for users who didn't receive the email or use email filtering services, including the email address 'CNECT-ICT-2018@ec.europa.eu'. A green arrow points to the link: 'Participate in the [Ideal-ist face2face brokerage event at the ICT 2018 Event](#)'. Below this is the 'About You' section with links for '[Your public profile]', '[Edit your registration information]', and '[Change Password]'.

**Registration step 5:**

Click on link "Take me to the Ideal-ist face2face brokerage event registration page now", marked with green arrow

European Commission > Strategy > Digital single market > ICT 2018 Event >

Digital Single Market

Welcome, Edina NEMETH [[Log out](#)] [[My Event](#)]

## Ideal-ist face2face brokerage event at the ICT 2018

Register and book meetings until the 21st of November

Ideal-ist, the ICT National Contact Point Network, is organising in cooperation with the Enterprise Europe Network (EEN), a brokerage event with pre-arranged face2face meetings. It offers an additional way of networking and possibly meeting potential cooperation partners at the event.

The face2face brokerage event uses a matchmaking tool that is hosted outside the ICT 2018 Event website. First you register to it online and submit your own cooperation profile. Then you can search through other people's cooperation profiles that are published on the website and select who to meet personally. A few days before the event you will receive your personal meeting schedule.

The meetings are pre-arranged and strictly limited to 20 minutes. They will take place in a dedicated area of the venue.

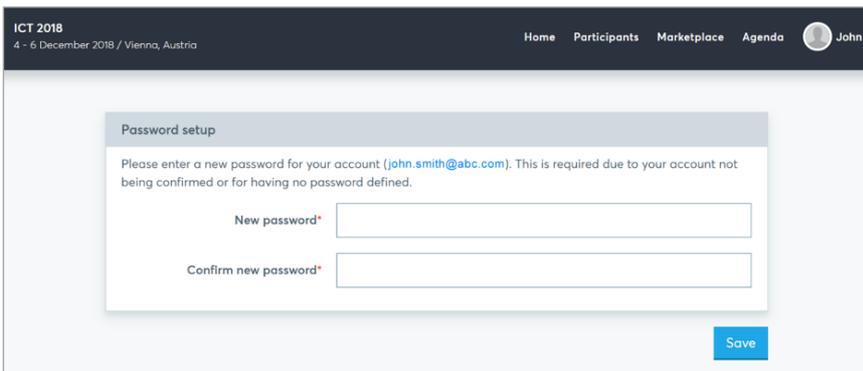
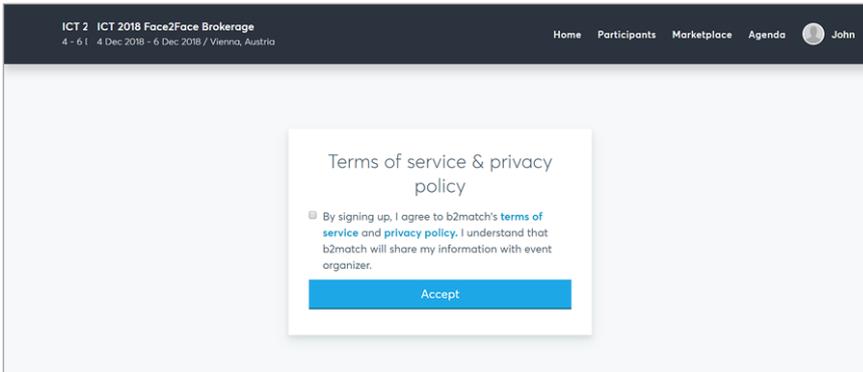
### How to participate in the face2face brokerage event?

The Ideal-ist face2face brokerage event at the ICT 2018 Event is an optional service and requires a separate registration.

[Take me to the Ideal-ist face2face brokerage event registration page now](#)

**Registration step 6:**

You will be re-directed to the Face2Face brokerage website, and asked to accept terms. If you do not have an account, you may need to set it up and select a password. Some of your registration data is pre-filled with information from your ICT 2018 registration. Fill in missing fields to register.



**Registration step 7:**

Your Face2Face brokerage profile page will open. Some of the data is pre-filled (job position, organisation, name). You can edit your organisation and add cooperation offers to be displayed on the marketplace for ICT 2018 (e.g. project cooperation, expertise, etc.)

The screenshot shows the user's profile page on the 'ICT 2018 Face2Face Brokerage' platform. The header includes the event name, dates (4 Dec 2018 - 6 Dec 2018 / Vienna, Austria), and navigation links (Home, Participants, Marketplace, Agenda) along with the user's name 'John'. The profile card on the left displays the user's name 'John Smith', title 'CEO at ABC Innovation Ltd', and location 'Budapest, Hungary', with an 'Edit my profile' button. A 'My profile' menu lists 'My attendance', 'Organiser questions', 'Account settings', and 'Logout'. The main content area shows the current organization 'ABC Innovation Ltd.' and five sections for adding offers: 'Product', 'Project Cooperation', 'Investment', 'Expertise', and 'Request', each with a brief description of what to add.

**Registration step 8:**

You can also edit your profile information (e.g. name, position, photo, organisation logo etc.)

ICT 2018 Face2Face Brokerage  
4 Dec 2018 - 6 Dec 2018 / Vienna, Austria

Home Participants Marketplace Agenda John

**John Smith**  
CEO at ABC Innovation Ltd  
Budapest, Hungary  
[Edit my profile](#)

[My profile](#)  
[My attendance](#)  
[Organiser questions](#)  
[Logout](#)

**Personal Information**

First Name \* John

Last Name \* Smith

Job Position \* CEO

Phone Number \*  
Only the Events Organiser can see your phone number

Profile Picture  
[Click here to upload a profile picture](#)  
Use a picture that gives the attendees a good impression of who you are. No logos or pictures of landscapes please.

**Organisation Information**

Organisation Name \* ABC Innovation Ltd.

Organisation Type \* Others

Website www.abc.com

Organisation description \*  
Write a short description about what your organisation does. Keep it short and enjoyable to read.

Organisation Logo  
[Click here to upload an organisation](#)  
Upload your organisation's logo. It will be visible inside your profile.

**Location**

Country \* Hungary

State province

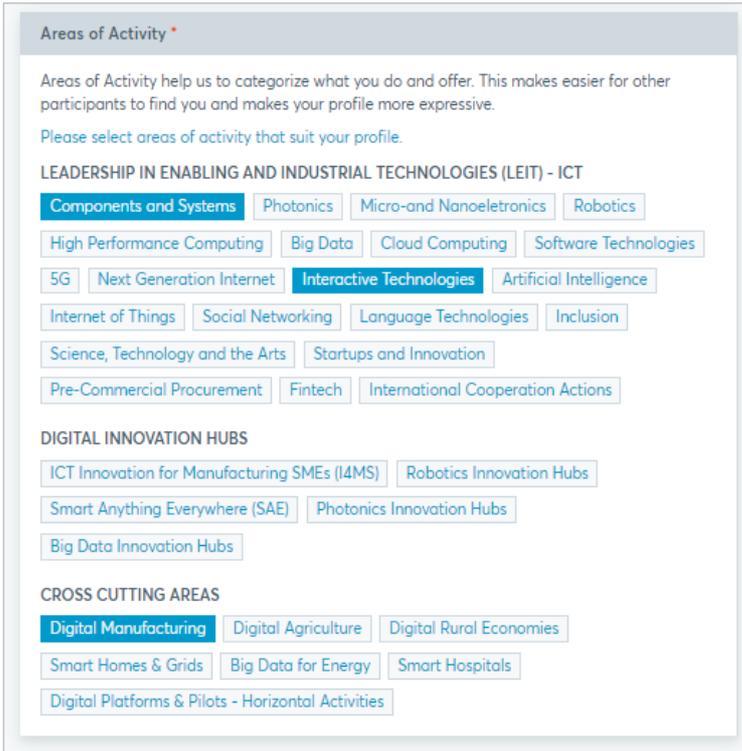
City \*

Zip code

Address

**Registration step 9: Selecting areas of activity**

This same page also includes a very important part, where participants can mark their work programme activity areas, by clicking on the tags of interest:



Click on the "Save" button at the bottom of the page.

**Registration step 10: Add a cooperation offer on the marketplace**

When you are back on your Face2Face brokerage profile page, expand let other participants know what type of cooperation you are interested in, by adding a cooperation offer (e.g. project cooperation, expertise) to the marketplace. Clicking on the plus sign, to expand the type of cooperation offer you want to add. When entering information for project cooperation and expertise, you can click on tags of topics of interest, which correspond to Horizon 2020 call topics.

**NEW PROJECT COOPERATION** x

**Title\*** (0/160)

**Description\***

**Project stage**  
Idea | Concept | Proposal | Ongoing | Project | Finished Project

**Topic**  
Components and Systems | Micro-and Nanoelectronics | Photonics | Robotics  
High Performance Computing | Big Data | Cloud Computing  
Software Technologies | 5G | Next Generation Internet | Interactive Technologies  
Artificial Intelligence | Internet of Things | Social Networking  
Language Technologies | Inclusion | Science, Technology and the Arts  
Startups and Innovation | Pre-Commercial Procurement  
International Cooperation Actions | Fintech | Digital Innovation Hubs  
Manufacturing | Cybersecurity | Quantum Technologies | ICT in Agriculture & Food  
Smart Homes & Grids | eHealth | ICT for Energy Efficiency  
Smart Cities & Communities | Smart Transport | Circular Economy  
ICT in Governance | ICT in Culture | Critical Infrastructure Protection  
Responsible Research and Innovation | Social Sciences & Humanities  
einfrastructures | Future and Emerging Technologies | FET Flagships | ICT in Water

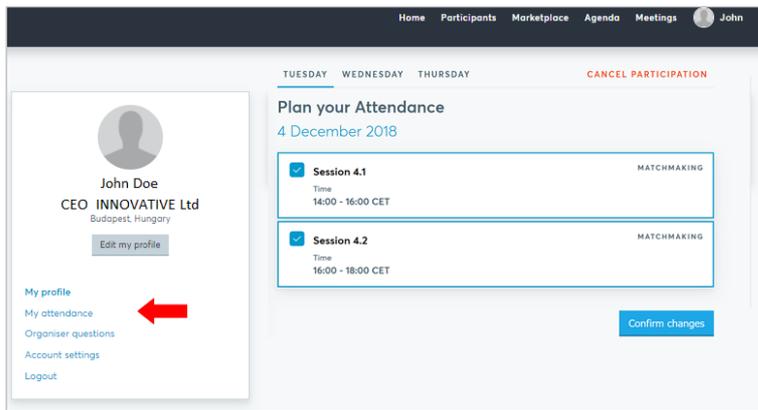
**Type of cooperation sought**  
Project Management/Coordination | Research work | Prototype development  
Testing the product/application | Performing surveys and statistical analyses  
Dissemination/communication activities | Exploitation/Commercialization

Cancel Save

**Registration step 10: Set your attendance or cancel your participation**

In order to ensure that you are only booked and scheduled for meetings at times that you are available, you need to set your attendance.

If you have to cancel your participation, you can do that on this page too.



You can also answer organisers questions, for example if you would like to receive more information about Ideal-ist.

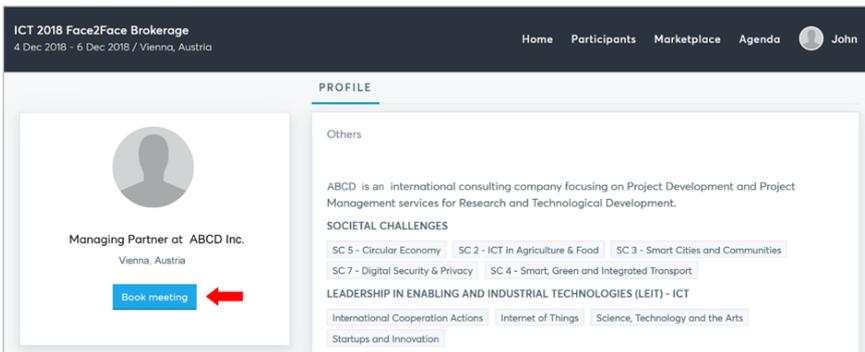
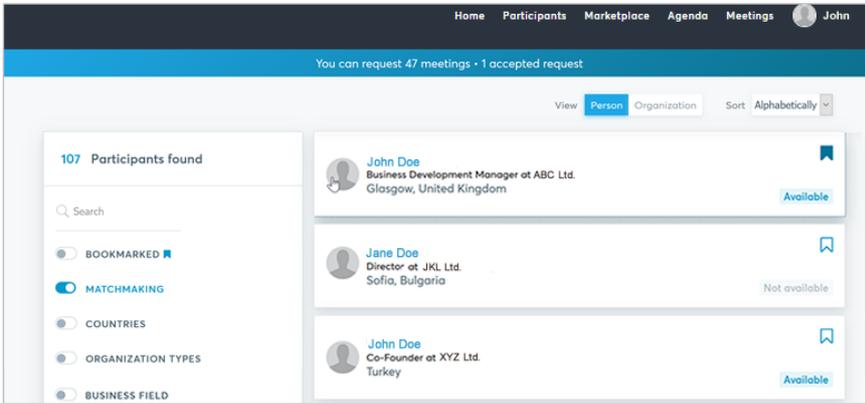
**Registration step 11: Searching for participants and booking meetings**

The event will have a meeting booking period, with a beginning and an end date.

Already prior to the booking period you can search through participants and bookmark the ones you are interested in meeting.

Once the meeting booking starts, you can filter by turning on the “bookmark” option to list all participants you are interested in. You can then click on individual participants and request meetings. All meetings are accepted by default.

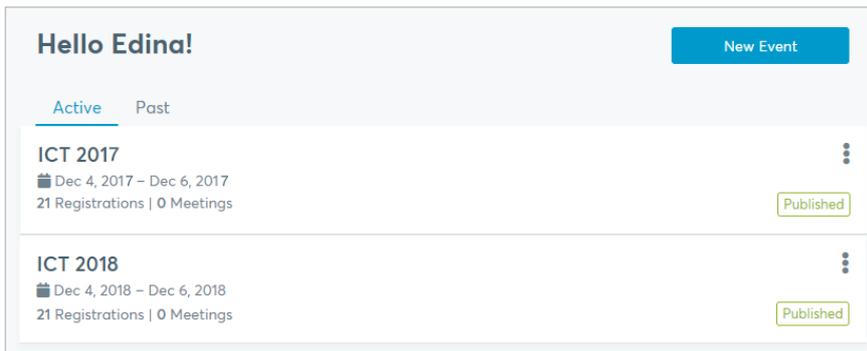
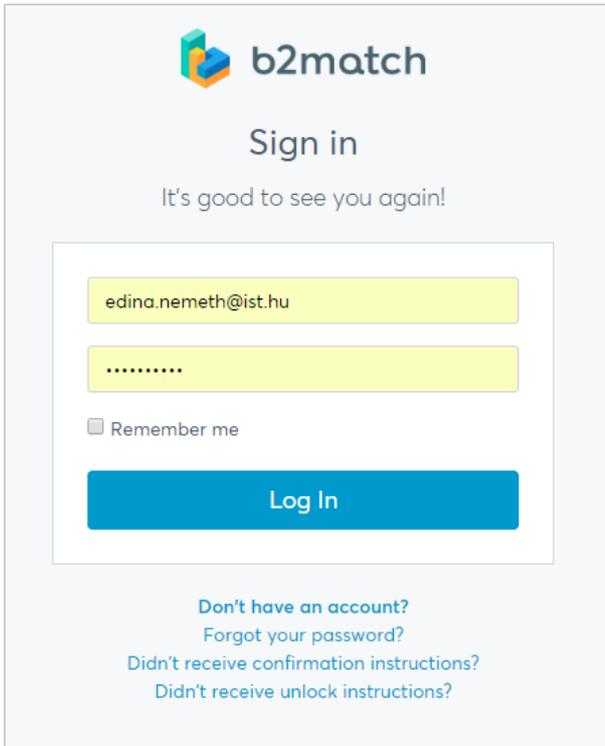
Once the booking period ends, organisers will schedule meetings according to the availability indicated by participants. The schedules will be available online and through the b2match app. Participants will be notified when the schedule becomes available.



### Annex 3. Screenshots - b2match instructions for administrators

#### Screen 0: Login & Overview

When you want to edit participants, you should login in as an administrator, by visiting the following url: <http://admin.b2match.com>  
(Do not use the login button on the public event site, that is for participants).



**Screen 1: Full participant List**

See the profiles you are responsible for by clicking on "PARTICIPANTS" in the left hand side menu, and then on the orange "My participants" button. You can edit only those you are responsible for, by clicking the "Edit" button.

The screenshot shows the 'Participants' screen with the following elements:

- Search Bar:** Search for participant
- Buttons:** Add Participant, Predefined Filters, Advanced Search
- Filters:** My participants (highlighted), Registration: All, Activated: All, Matchmaking: All
- Table:** A table with columns: Participant #, Organization #, Country #, Registration #, Matchmaking #, Marketplace #, Activated #, Visible #, and Edit.

Participant #	Organization #	Country #	Registration #	Matchmaking #	Marketplace #	Activated #	Visible #	Edit
21	ABC Innovation Ltd.	Austria	s2 s5 s9	0 0 0	1	✓	👁	Edit
20	XYZ University	Spain	No sessions	Not Participating	2	✓	👁	Edit
19	---	Germany	5 sessions	0 0 0	0	✓	👁	Edit
18	---	Turkey	s1 s6 s8	0 0 0	0	✓	👁	Edit
17	---	Netherlands	s7	0 0 0	0	✓	👁	Edit
16	---	Israel	7 sessions	0 0 0	0	✓	👁	Edit
15	---	Belgium	s2 s5 s9	0 0 0	0	✓	👁	Edit
14	---	Israel	s7 s8	0 0 0	0	✓	👁	Edit
13	---	Germany	s5 s8	0 0 0	0	✓	👁	Edit
12	---	Spain	s1 s6 s8	0 0 0	0	✓	👁	Edit
11	---	Italy	s2	0 0 0	0	✓	👁	Edit
10	---	Latvia	6 sessions	0 0 0	2	✓	👁	Edit

**Screen 1a: Full participant List** – Quick view of profile

If you click on a single line, you can see the a quick view of the most important information about the participant on the side panel.

In this quick profile view, you can click on “notes” to add information about phone and email contacts made, recommendations for changes, etc.

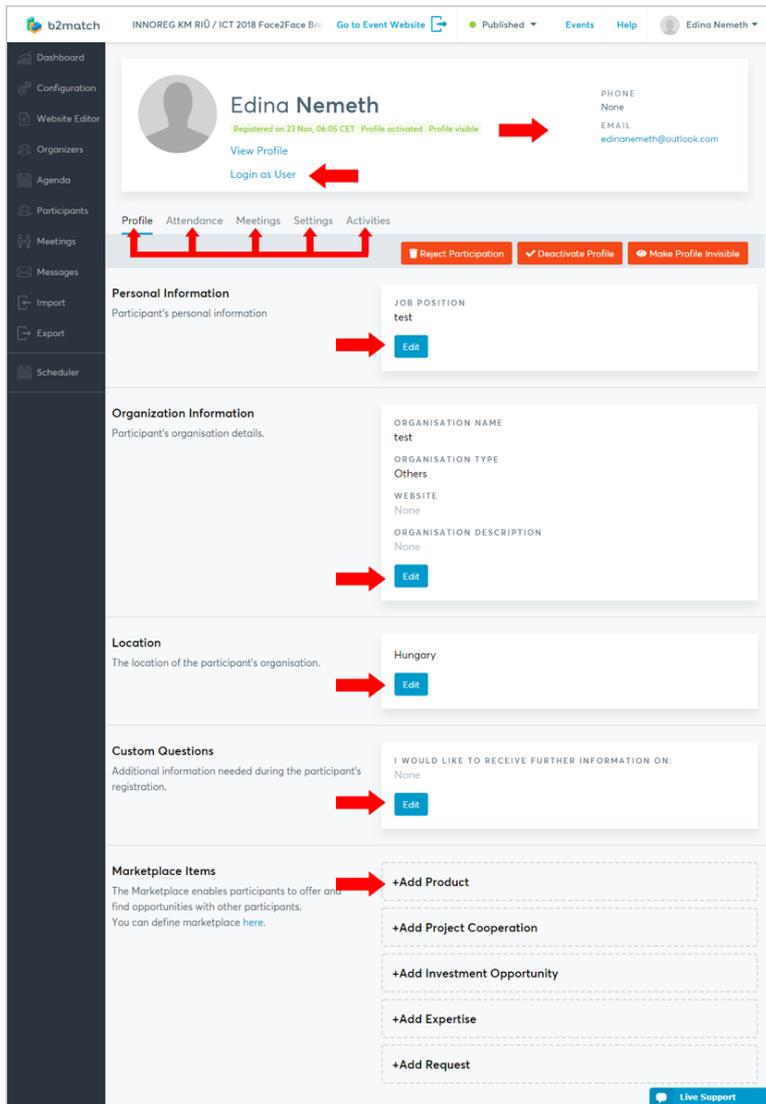
The screenshot displays a web interface for managing participants. At the top, there is a search bar and filter options for 'All participants', 'Registration: All', 'Activated: All', and 'Matchmaking: All'. Below this are buttons for 'Add Participant', 'Predefined Filters', and 'Advanced Search'. The main area shows a table of participants with columns for ID, Name, Company, Sessions, and other metrics. Two participants are visible: John Doe (ID 64) and Nemeth Edina (ID 35). The right-hand side panel shows the profile for Edina Nemeth, including a profile picture, name, test status, and location (Hungary). It also lists registration status (Registered on 23 Nov, 06:05 CET), support office (Without support office), email (edinanemeth@outlook.com), phone (None), marketplace (None), sessions (0), bookings (0), and documents (PDF Agenda). A 'Login as User' button is at the bottom of the profile panel.

ID	Name	Company	Sessions	Other Metrics	Actions
64	John Doe	ABC Innovations Ltd	4 sessions	11 0 0 1	✓ [Eye Icon] Edit
35	Nemeth Edina	test	No sessions	Not Participating 0	✓ [Eye Icon] Edit

**Screen 2a: Participant profile – administrators view**

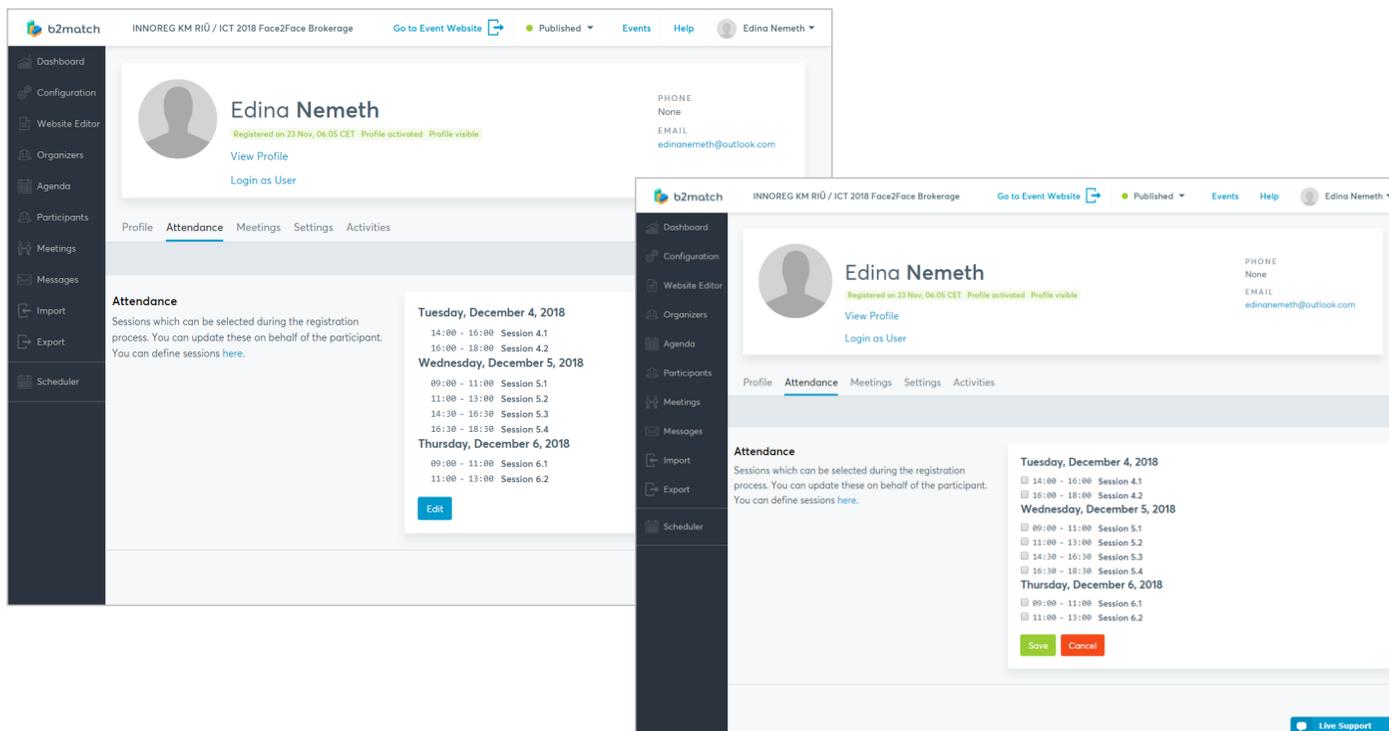
You can edit participants 2 ways: (1) login as user (use the relevant button) and follow user instructions in section above. (2) edit as administrator

Click through tabs to see information entered by the Participant. See project idea by clicking on “Cooperation Profiles” tab. Log any action you have taken on the “Settings” tab. Return to participant list by clicking on it in top right corner.



### Screen 2b: Attendance

This is where the participants can indicate their availability for Face2Face meetings. At least one time slot should be selected. If nothing is selected, the participant cannot book meetings (participants will be reminded of this through centralised emails). Click on edit, check the boxes, and don't forget to save.



**Screen 2c: Activities**

Under the activities tab you can get an overview on all the interactions the participant has had with the b2match system (dates of registration, messages received, meetings booked, etc..

**Scott Stephens**  
Registered on 27 Mar, 10:20 CEST | Profile activated | Profile visible  
[View Profile](#)

Profile Attendance Meetings Settings **Activities**

Meetings  Messages  Profile

Date	Time	Activity
Apr 10, 2018	13:01	✔ "OPEN 2018 - Invitation to participate again " message was delivered.
	12:40	✔ "Testing emails" message was delivered.
	12:11	✔ "Welcome!" message was delivered.
Mar 28, 2018	11:33	✔ "Invitation" message was delivered.
	11:29	✘ Rejected a meeting request from <b>Vicêncio Da paz</b> .
	11:29	✔ "Meeting was requested" message sent.
	11:29	✔ "Meeting request was cancelled" message sent.

### Annex 4. Email templates for contacting participants about their profiles

#### A.4.1. Email template for feedback on Organisation Profile only

**Subject:** Your organisation profile for the the ICT 2018 Face2Face brokerage

Dear <ParticipantName>

**Commented [A1]:** Fill in the participant's name

Thank you for your interest and registration for the **Ideal-ist / EEN brokerage event at ICT 2018** taking place in Vienna, Austria on 4-6 December 2018. I am contacting you as your National Contact Point for ICT in Horizon 2020.

I would like to recommend that you extend your profile in order to maximize your chance of being booked for well-targeted Face2Face meetings.

The more concrete your profile is (e.g. your experience in Horizon 2020) the better visibility and the more interest it gets.

#### YOUR PROFILE

We highly recommend that you add further details to your **organisation description**, e.g:

- Briefly describe your key activities and services.
- Describe research & innovation experience, especially within the EU Framework Programme(s).
- Select at least one ICT area, for better, more focused Face2Face meetings.
- We also recommend including a picture in your profile as experience shows that this significantly increases your chance of being booked for Face2Face meetings.

**Commented [A2]:** If organisation description is insufficient – only list missing items

**Commented [A3]:** Only if picture is missing

#### PUBLISH A HIGH QUALITY CO-OPERATION PROFILE

In addition, we highly recommend that you publish your **cooperation interests in the marketplace**. Cooperation offers give you the opportunity to spotlight, publish and promote your collaboration interests: H2020 project ideas, expertise offers, requests, products and investment offers. You can submit several cooperation offers. All participants of the event will be able to see your organisation details and your published cooperation offers.

A statistical analysis of many matchmaking events showed that high quality profiles are visited about 50 to 150 times before the event and will still be viewed after the event. **Your profiles are the best impression other organisations receive from you.**

**Commented [A4]:** Recommend that participants publish cooperation profiles for better targeted meetings (H2020 project ideas, H2020 expertise offers, innovation offers / requests

Please inform me after finishing your updates so that I can review your profile.

Don't hesitate to contact me if you have further questions.

Best regards,  
<YourName>

**Commented [A5]:** Fill in your name

### A.4.2. Email template for feedback on Project Idea

**Subject:** Your Horizon 2020 ICT Project Idea for the the ICT 2018 Face2Face brokerage

Dear <ParticipantName>

**Commented [A6]:** Fill in the participant's name

Thank you for your interest and registration for the **Ideal-ist / EEN brokerage event at ICT 2018** taking place in Vienna, Austria on 4-6 December 2018. I am contacting you as your National Contact Point for ICT in Horizon 2020.

You submitted a **Horizon ICT Project Idea**. To make your participation as successful as possible **please include information on**

**DESCRIPTION OF PROJECT IDEA:**

- Topic (please specify the topic/subtopic as defined in the [ICT \(or related\) work programme](#))
- Type of Project (Research and Innovation Action, Innovation Action, etc.)
- Project objectives (target technical outcome(s), target socio-economic impact(s))

**WANTED:**

- Competences & skills wanted
- Type of partner sought (industry, SME, RTD centre, university, user-groups etc.)
- Work to be performed (research, development, prototyping, programming, system integration, dissemination, engineering etc.)

**YOUR SKILLS:**

- Please describe your own skills, competences and expertise relevant to the project idea

**Commented [A7]:** Only keep missing items

**ADDITIONAL RECOMMENDATIONS:**

- Please ...

**Commented [A8]:** Please insert any other recommendations you may have

We encourage you to submit several cooperation offers on the marketplace – including H2020 project ideas, expertise offers, as well as requests for competences you may need from others.

If you **do not yet have a specific project idea** you can still highlight your expertise related to future to Horizon 2020 ICT collaborations.

**Commented [A9]:** If a participant includes a cooperation profile with a project idea, but the content of this does not include a project description, please recommend that the participant changes the profile type.

Please inform me after finishing your updates so that I can review your profile.

Are you looking for more exposure for your project idea?

You can apply on the "My event" section of the [main ICT 2018 event page](#) to present your idea by uploading a presentation!

Don't hesitate to contact me if you have further questions.

Best regards,  
<YourName>

**Commented [A10]:** Fill in your name

#### A.4.3. Email template for feedback on H2020 expertise offer:

**Subject:** Your Horizon 2020 ICT expertise offer for the ICT 2018 Face2Face brokerage

Dear <ParticipantName>

**Commented [A11]:** Fill in the participant's name

Thank you for your interest and registration for the **Ideal-ist / EEN brokerage event at ICT 2018** taking place in Vienna, Austria on 4-6 December 2018. I am contacting you as your National Contact Point for ICT in Horizon 2020.

You submitted an **expertise offer**. To make your participation as successful as possible **please include information on:**

**DESCRIPTION OF EXPERTISE OFFERED:**

- Expertise, staff, equipment and commitment offered
- Topic (if relevant, please specify the topic(s)/subtopic(s) as defined in the [ICT \(or related\) work programme](#))

**PREVIOUS EXPERIENCE IN FP & H2020 PROJECTS:**

- Please describe your experience in projects you have coordinated or participated in – please list those most relevant to the topic you selected.

**ADDITIONAL RECOMMENDATIONS:**

- Please ...

**Commented [A12]:** Please insert the recommendations of the quality team

We encourage you to submit several cooperation offers in the marketplace: including H2020 project ideas, expertise offers, as well as requests for expertise from others.

If you **have a specific project idea** you we highly recommend that you add a **Horizon 2020 ICT Project cooperation** offer on the **Marketplace**, as experience shows that specific project ideas get the most interest.

Please inform me after finishing your updates so that I can review your profile.

Don't hesitate to contact me if you have further questions.

Best regards,  
<YourName>

**Commented [A13]:** Fill in your name