

ratio

THE INNOVATORS USER GUIDE

RATIO HOW TOS

SEPTEMBER 2023

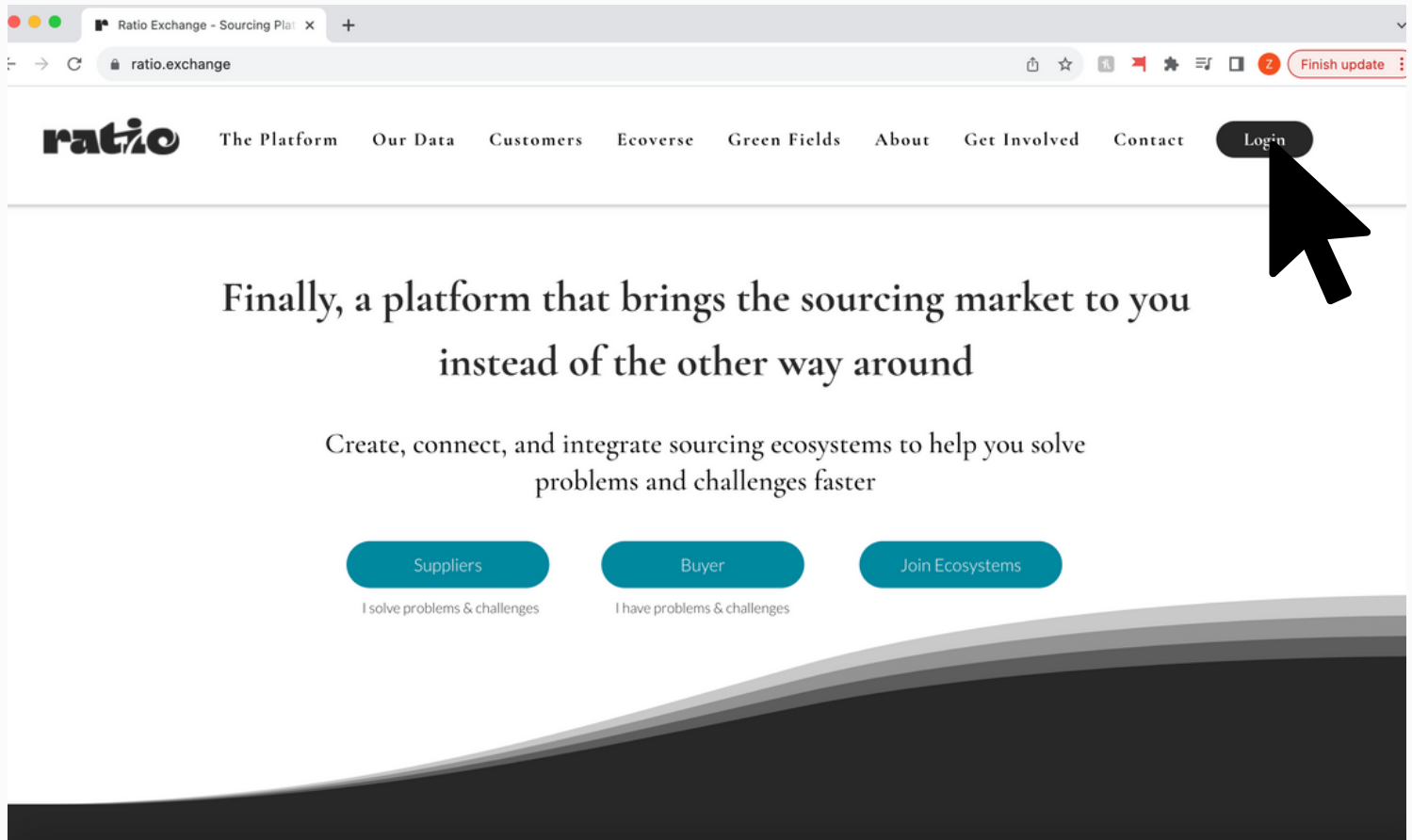
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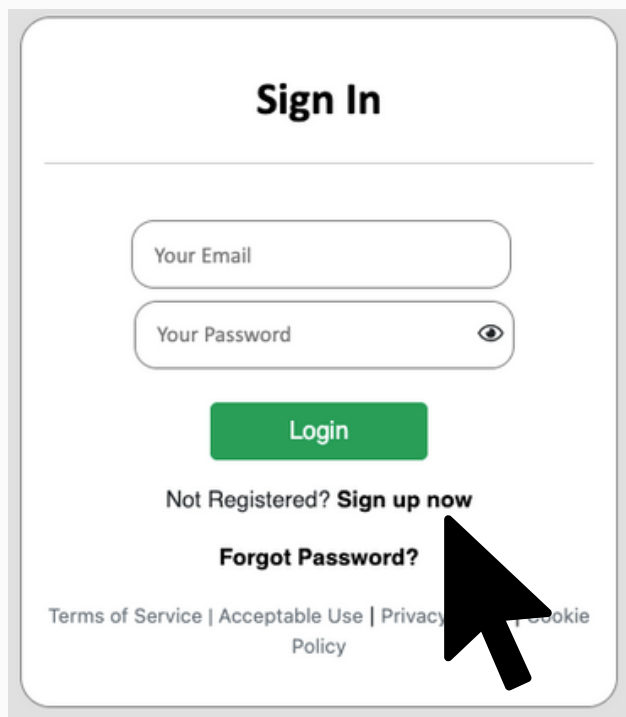
HOW TO CREATE AN ACCOUNT

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A. Click “Login” at www.ratio.exchange



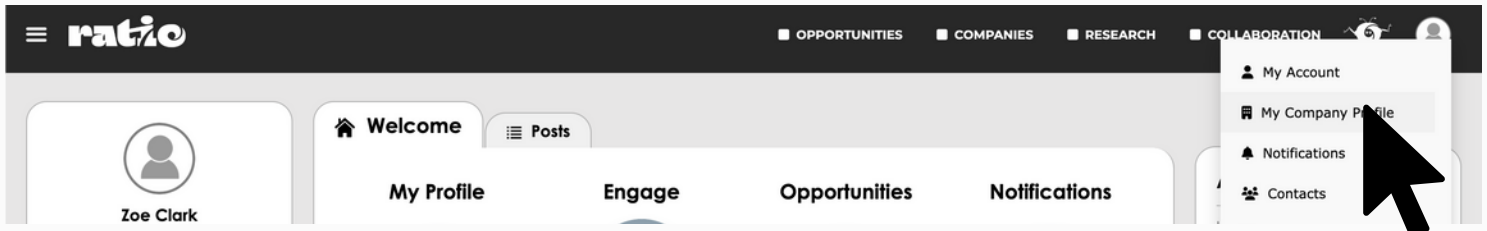
B. Select “Sign up Now” & follow prompts



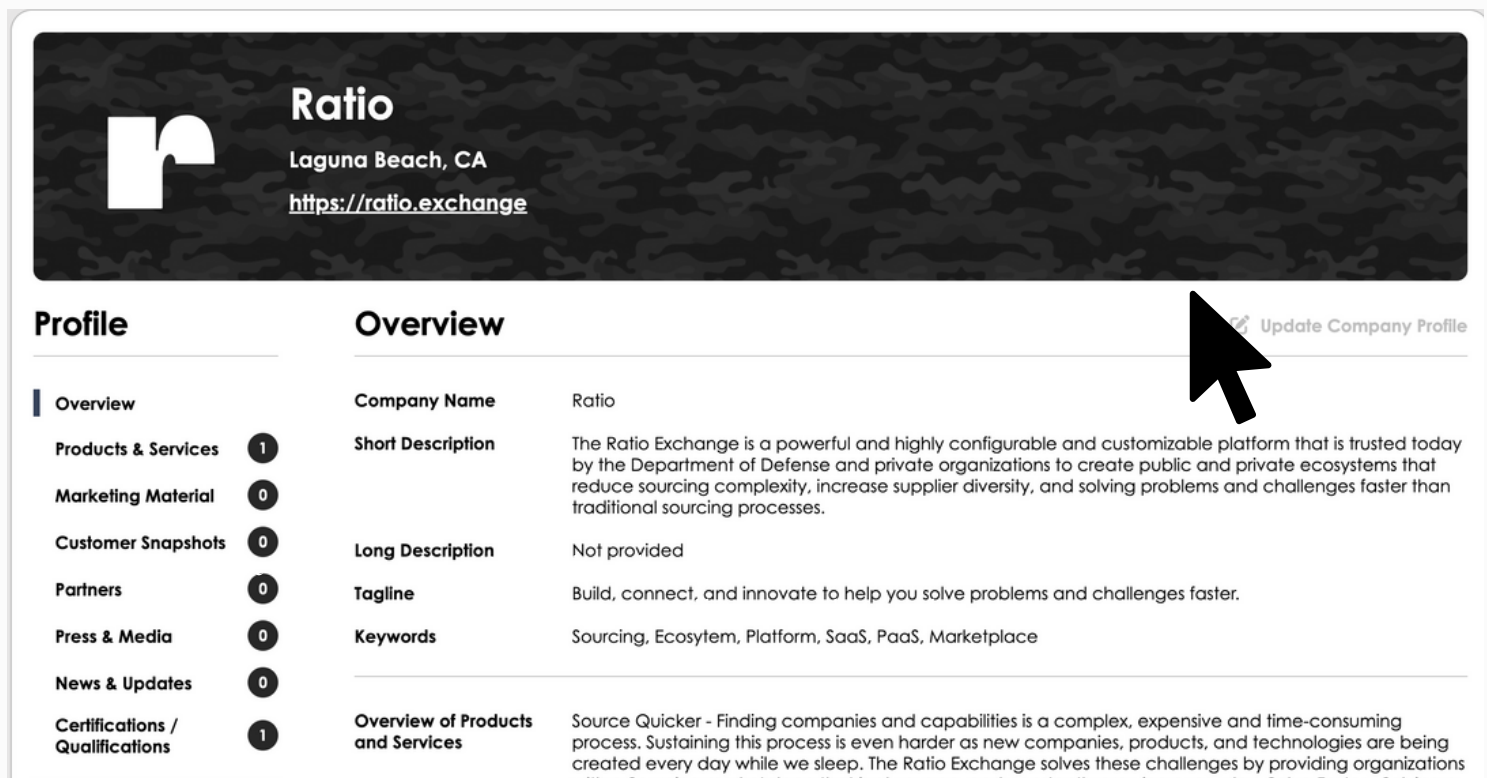
HOW TO UPDATE YOUR COMPANY PROFILE

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A. Select “My Company Profile” under on your profile icon in top right corner



B. Select “Update Company Profile”



C. Fill out your Company Name, Tagline, About, Full Description, Keywords, and Products & Services.

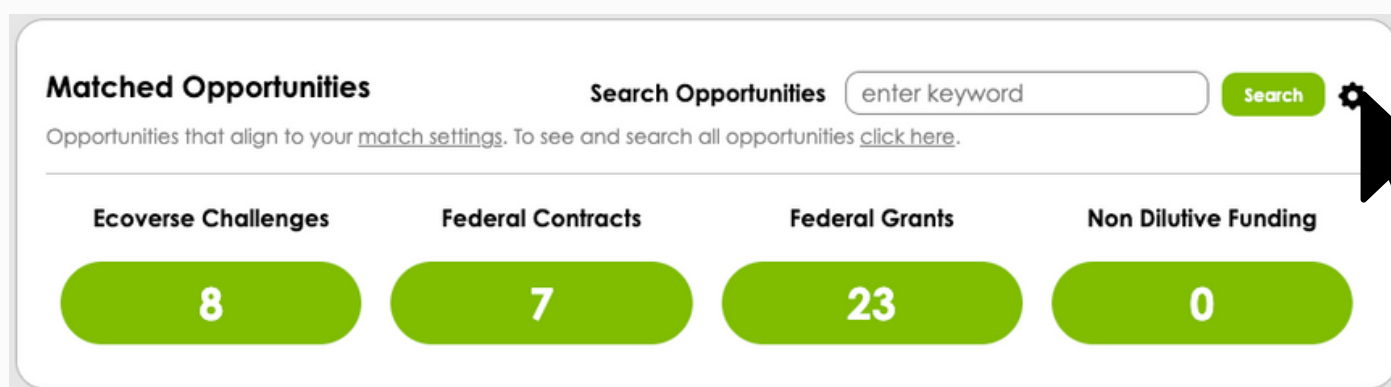
Government Agencies source & match with innovators using content on this page. Fill it out to be as robust as possible!



HOW TO SET UP YOUR MATCHED OPPORTUNITY DASHBOARD

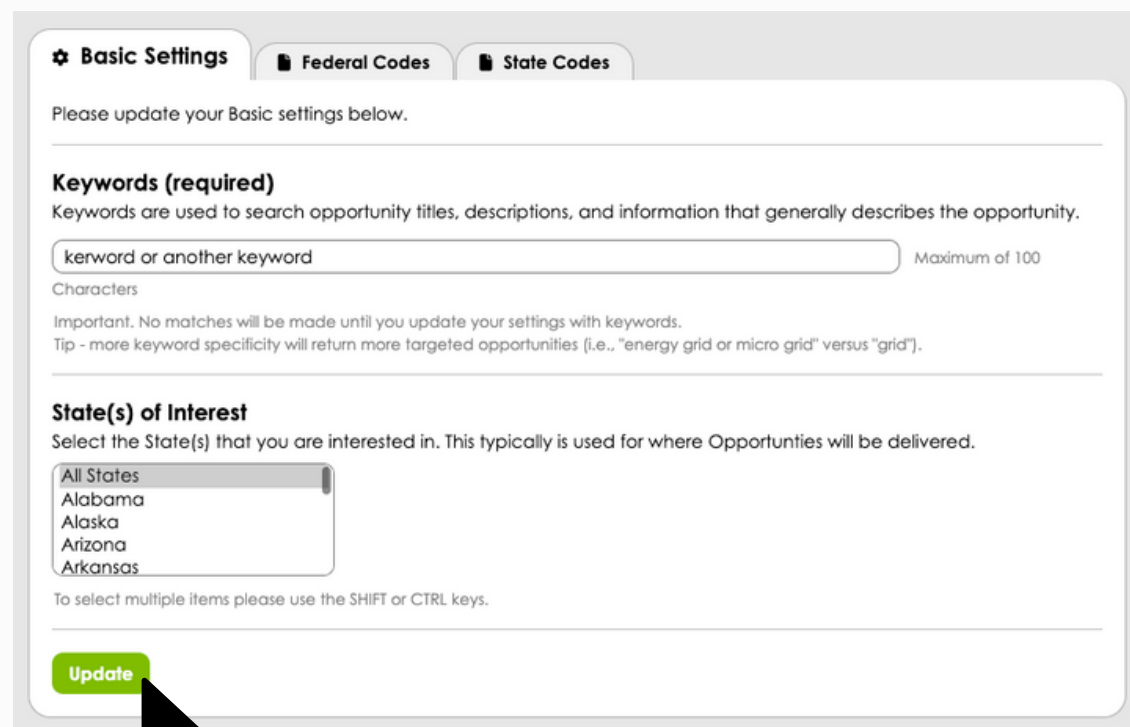
Create a personalized dashboard of Ecoverse Challenges, Federal Contracts, Federal Grants and Non-Dilutive Funding. Updated every 2 minutes.

A. Find “Matched Opportunities” on your homepage then select the setting wheel



The screenshot shows the 'Matched Opportunities' section of a dashboard. At the top left is the title 'Matched Opportunities'. To its right is a search bar labeled 'Search Opportunities' with the placeholder text 'enter keyword' and a green 'Search' button. A gear icon for settings is located to the right of the search bar, with a black mouse cursor pointing at it. Below the search bar is a subtitle: 'Opportunities that align to your [match settings](#). To see and search all opportunities [click here](#).' Underneath are four green rounded rectangular buttons representing different categories and their counts: 'Ecoverse Challenges' with '8', 'Federal Contracts' with '7', 'Federal Grants' with '23', and 'Non Dilutive Funding' with '0'.

B. Enter your capabilities using “and” and “or” to separate keywords



The screenshot shows the 'Basic Settings' page. At the top are three tabs: 'Basic Settings' (selected), 'Federal Codes', and 'State Codes'. Below the tabs is a message: 'Please update your Basic settings below.' The main section is titled 'Keywords (required)' and includes the instruction: 'Keywords are used to search opportunity titles, descriptions, and information that generally describes the opportunity.' There is a text input field with the placeholder 'keyword or another keyword' and a 'Maximum of 100 Characters' label. Below the field is a tip: 'Important. No matches will be made until you update your settings with keywords. Tip - more keyword specificity will return more targeted opportunities (i.e., "energy grid or micro grid" versus "grid").' The next section is 'State(s) of Interest' with the instruction: 'Select the State(s) that you are interested in. This typically is used for where Opportunities will be delivered.' A dropdown menu is open, showing a list of states: 'All States', 'Alabama', 'Alaska', 'Arizona', and 'Arkansas'. Below the dropdown is a note: 'To select multiple items please use the SHIFT or CTRL keys.' At the bottom left of the settings area is a green 'Update' button with a black mouse cursor pointing at it.

C. Press update!

HOW TO MANUALLY SEARCH OPPORTUNITIES

A. Select “Open Challenges” under the “Opportunities” bar

The screenshot shows the Ratio Exchange website interface. At the top, there is a navigation bar with the following items: OPPORTUNITIES, COMPANIES, RESEARCH, and COLLABORATION. Under the OPPORTUNITIES dropdown, 'Open Challenges' is highlighted with a blue arrow. Below the navigation bar, there are tabs for 'My Opps', 'Federal Contracts', 'State Contr...', 'Opportunity Board...', 'S/STTRs', 'Needs', 'Challenges', and 'Tech Transfer'. The 'Challenges' tab is selected. The main content area is titled 'Search Challenges' and includes a search bar with the placeholder text 'Search for a Challenge...'. Below the search bar, there are filters for 'All', 'Status', and 'All'. A green 'Search' button is located to the right of the search bar. Below the search bar, there are tabs for 'Recently Posted', 'Ecosystem Challenges (138)', and 'Other Challenges (200)'. The 'Ecosystem Challenges (138)' tab is selected. Below the tabs, there are filters for 'Filter Challenges', 'Select Ecosystem' (set to 'All'), 'Status' (set to 'Open'), and 'Sort By' (set to 'Close Date (earliest)'). A blue arrow points to the 'Status' dropdown menu. Below the filters, there is a list of challenges. The first challenge is 'Engineered Resilient Systems - Broad Other Transaction Authority Announcement (BOTAA)' by ERDCWERX. It includes a green 'Open' button and a star icon.

B. Search by keywords or capability

The screenshot shows the 'Search Challenges' section of the Ratio Exchange website. It includes a search bar with the placeholder text 'Search for a Challenge...'. Below the search bar, there are filters for 'All', 'Status', and 'All'. A green 'Search' button is located to the right of the search bar. Below the search bar, there are tabs for 'Recently Posted', 'Ecosystem Challenges (138)', and 'Other Challenges (200)'. The 'Ecosystem Challenges (138)' tab is selected. Below the tabs, there are filters for 'Filter Challenges', 'Select Ecosystem' (set to 'All'), 'Status' (set to 'Open'), and 'Sort By' (set to 'Close Date (earliest)').

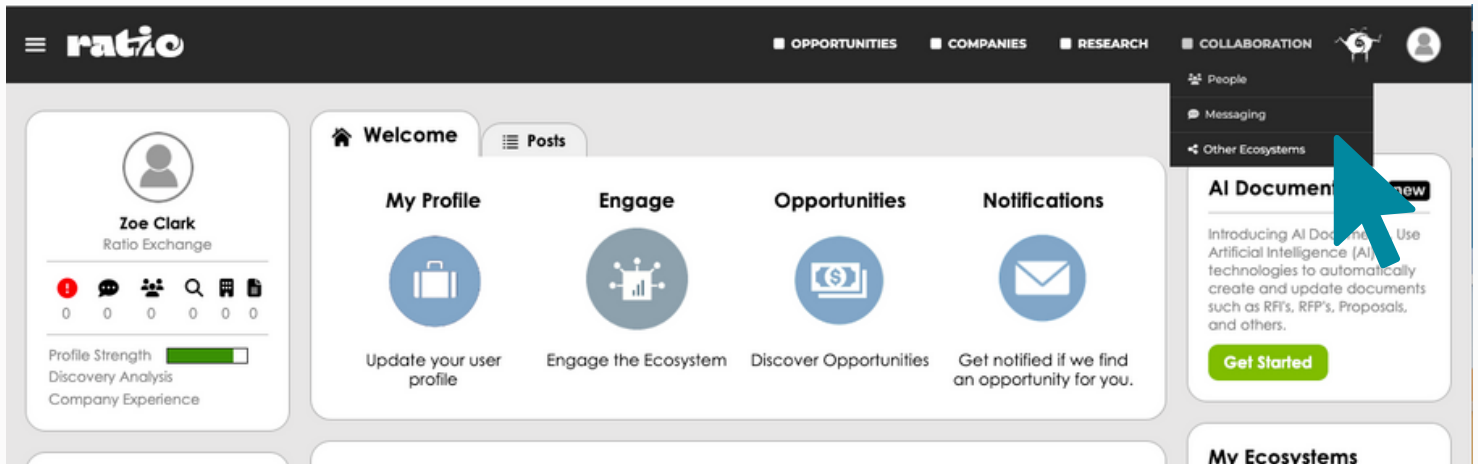
C. Save opportunities by clicking the thumbtack

The screenshot shows the 'Filter Challenges' section of the Ratio Exchange website. It includes a search bar with the placeholder text 'Search for a Challenge...'. Below the search bar, there are filters for 'All', 'Status', and 'All'. A green 'Search' button is located to the right of the search bar. Below the search bar, there are tabs for 'Recently Posted', 'Ecosystem Challenges (138)', and 'Other Challenges (200)'. The 'Ecosystem Challenges (138)' tab is selected. Below the tabs, there are filters for 'Filter Challenges', 'Select Ecosystem' (set to 'ENERGYWERX'), 'Status' (set to 'Open'), and 'Sort By' (set to 'Close Date (earliest)'). Below the filters, there is a list of challenges. The first challenge is 'Voucher Opportunity 1 - Pre-Demonstration Commercialization Support (OCED/EERE)' by ENERGYWERX / DOE. It includes a green 'Open' button and a star icon. A blue arrow points to the star icon.

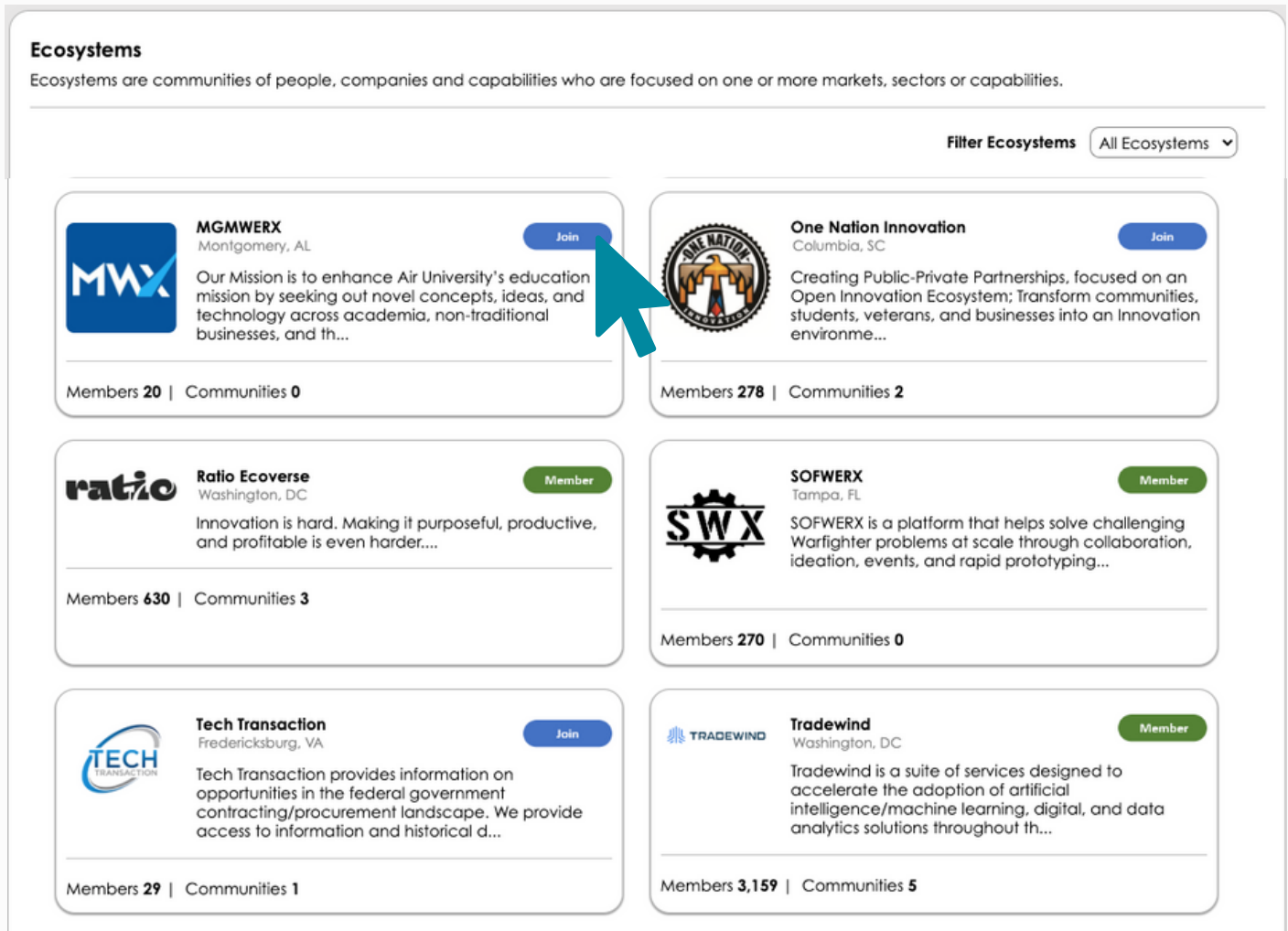
HOW TO JOIN ECOSYSTEMS

Government Agencies and Corporations build Ecosystems of innovative companies on Ratio to issue market specific challenges and award top responses.

A. Select “Other Ecosystems”

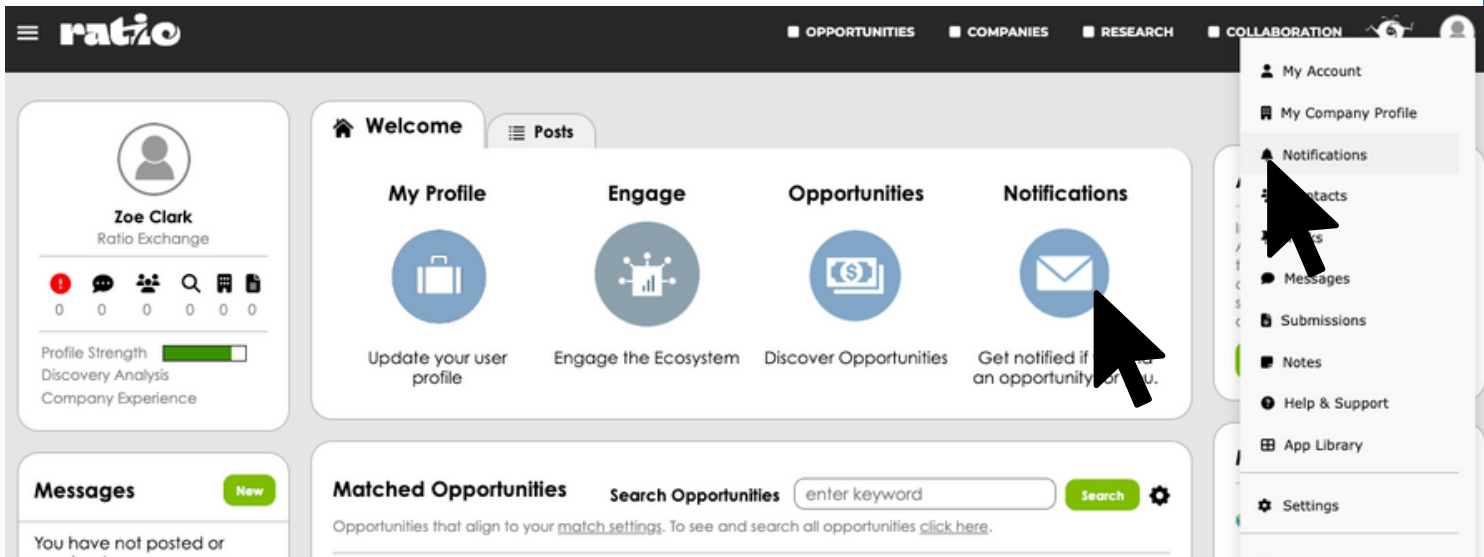


B. Join Ecosystems of markets you work in

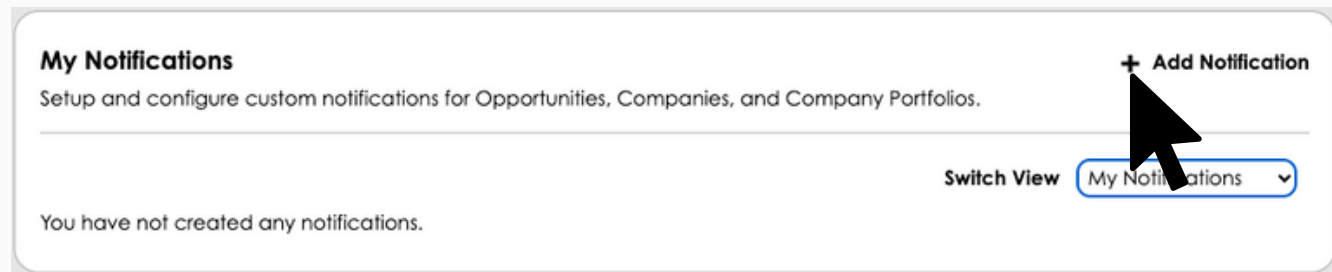


HOW TO SET UP EMAIL NOTIFICATIONS

A. Select “Notifications” in your shortcuts or under profile



B. Click “Add Notifications”



C. For Opportunities Click Open Opportunities

The left screenshot shows the 'Add Notification' form with the 'Open Opportunities' radio button selected. The right screenshot shows the form with the following fields filled out:

- Notification Type:** Open Opportunities
- Notification Name:** (empty)
- Description:** (empty)
- Opportunity Categories:** Federal Contracts, Grants, SBIR/STTRs, Challenges, State Contracts, In Network Opportunities (all checked)
- Place of Performance:** Any State
- Search Keywords:** (empty)
- NAICS Code(s):** (empty)
- PSC Code(s):** (empty)
- Notification Schedule:** Daily (Daily - 7am (EDT) each day, Weekly - 7am (EDT) every Monday, Monthly - 7am (EDT) on the 1st of each month)
- Status:** On (Active)

A 'Save Notification' button is visible at the bottom of the form.

D. Fill in Required Fields*

Note: Keywords need to be separate by “and” or “or”, Be sure not to use commas!

RATIO LEARNING

For more how-tos and tips on mastering Ratio and winning funding subscribe to the Ratio newsletter on our website and follow us on Instagram and LinkedIn and Youtube. You'll receive updates on open and closing challenges, latest blogs, and more. We can be funny sometimes - tap in.



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