**RATIO Exchange Summer’ 20 Release Notes (2.1)**

**FIND COMPANIES | SOURCE FASTER | SOLVE QUICKER| SEE OPPORTUNITIES**

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**RATIO Exchange Summer ’20 Release Notes**

# SUMMER’ 2020 RELEASE

The Summer’ 20 Release represents a new perspective in collaboration, capability and functionality. The Exchange is now in its 2nd year of production and represents the culmination and harmonization between brokers, members, companies, and the valued input given by all. We heard and have listened to what you have been saying. So, we have made the Exchange easier to find what is important to you, added easy to navigate dashboards and graphs that make information understandable, all the while keeping the functionality that allows members who really want to dive into the data the opportunity to do so . We have learned so much and are continuing to refine, grow and improve. We are dedicated continuously bring in new resources, expand functionality and grow the Exchange experience.

# 2. EXCHANGE CAPABILITES and FUNCTIONALITY

The Exchange sources, organizes and integrates information from dozens of private and public resources to provide users with insights and intelligence to make informed decisions. This information is structured within and across 8 major categories.

* **ANALYTICS –** Are applications that analyze Exchange data and create insights and opportunities.
  + Buying Patterns
  + Capability Trends
  + Competitive Analysis
  + Market Reports
  + Partner Finder
  + Socio Economic Analyzer
* **MARKETPLACE -** An eco-system of Information that describes capabilities, products, services, people, and partners of private and public sector companies, organizations, communities, networks, Exchanges, and brokers
  + - Company Profile Information
    - In Network
    - Out of Network
    - Brokers
    - Exchanges
    - Networks
* **OPPORTUNITIES -** Active Federal government procurements, industry challenges, and other channels that broadcast the need and demand for products, capabilities, services resources, and technology. Sources include:
  + - Open Federal Contracts
    - Grants
    - The Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR)
    - Needs-Requests that customers post on the Exchange seeking insights, information or approaches to help them solve their challenges or problems.
    - Challenges - Opportunities to help customers solve problems in a competitive environment.
* **RESEARCH –** Find information on Federal government awards including:
  + Federal prime contracts & Federal subcontracts
  + Federal grants
  + Federal SBIR/STTR awards
  + Federal contract vehicles
  + Small Business Set-asides / Socio Economic Status
* **INNOVATION & TECH –** Find and source innovations and technologies from:
  + University Technologies
  + Federal Laboratories
  + US Patents
  + Innovation websites
  + Incubators and Accelerators
* **SOURCING** – Are applications and functionalities used to locate and manage the resources needed to become successful
  + Need manager - Broadcast your needs to your Exchange or other Exchanges.
  + Investors & Investments - Search and find Investors and the Investments they have made in Companies.
  + Sponsors - Manage and display your sponsors.
  + Events and Programs
  + Resource Library
* **TOOLS** – Are applications that are used to aggregate, interrogate, summarize, or give perspective on data within the Exchange
  + - * + Challenge Manager
        + Company Portfolios
        + Contract Vehicles
        + Contracting Points of Contact
        + Names Research (company) PoC
        + Opportunity Boards
        + Risk Management (BETA)
* **COLLABORATON -** Are applications and functionalities that focus on working with another person or group to achieve and create opportunities
  + - * + Communities
        + Group Management
  + Message
  + People

# 3. WHAT’S NEW

## 3.1 User Interface

* The Exchange user interface has been reimagined. It is now possible to configure the look & feel, capability, and functions of an Exchange, while still providing digestible information and members with rapid access to information and opportunities
* Exchange applications, functions and features have been organized into 7 categories: Marketplace, Opportunities, Research, Innovations & Technologies, Sourcing, Tools, and collaboration
* Member functionality and capability is now based on Roles (permissions) configured by the local Exchange admin
* We have added the ability to message and receives messages with other Exchange members
* Your own personal network, you can now follow other Exchange members, keep track of your connections, see who is viewing your profile and follow companies within the Exchange to see what is new.
* Newswire is a new look on an old function, this function keeps you updated about what is going. You can choose if you want to receive announcements, events, and Updates.
* In all keyword searches you are able to string keywords together using Boolean logic (and, or not statements) i.e., (machine learning or artificial intelligence and cloud)
* You are able to add NAICS and PSC Codes to keyword searches
* We have added active dashboards and programable custom links to provide a streamline user experience.
  + Active Dashboards let you dive down into the data and information from the dashboard
  + Programmable custom links provide you a quick link to any function within the exchange or links to other websites

## 3.2 Help & Support

* We have a knowledge Center, ask questions, search for help, get insights and access our knowledge base get more information about how to use and capitalize upon the Exchange.
* We have integrated Customer Support and the Exchange Knowledge Center

## 3.3 Application Library

* We now have an App Library see all the application available
  + View applications by Category
  + See what application are new
  + My apps will display all applications that are currently installed on your Exchange

## 3.4 Notification

* My Feed has evolved into Notifications
* Define and monitor open opportunities from Contracts (Beta.sam.gov), Grants, SBIR/STTRs, and Challenges
* Define and monitor New awards
* Search using Key words, NAICS, PSC, and DUNS
* Receive notifications to your email or create a notification email list to provide the same information to your team
* Receive notifications daily, weekly, monthly, or run query for real time updates
* Save opportunity feeds to your portfolios, share with others, or engage the ecosystem with our post functionality
* Notification are activated under your Profile

## 3.5 Personal Profile

* Change and manage your Notifications
* Added field so you can list your Certifications
* Created the ability to change or associate to a new company
* Added the ability to link your Facebook, LinkedIn, and Twitter URLs

## 3.6 Admin Capability (Exchange Settings)

* + - * Administration or what we are calling Exchange settings is where an Exchange Administrator or a Broker Administrator can configure and perform limited customization to their Exchanges
        + Manage and add / remove members
        + Create and configure member types i.e. (Business Developer, Business Analyst)
        + Under role management you can add, edit, configure, and customize a role, the home page, the menu bar, and the drop downs
        + Create certification categories and then add those certifications to a member’s profile
        + We have added a Usage log providing and account of when a member has logged in and where a member has been in the Exchange
        + Add and remove companies based on your Exchange
        + Configure custom fields for your users enhancing inside information that can be entered
        + Assign tiers to companies i.e. (Tier 1, Tier 2, etc.)
        + Create categories based on your Exchange or Brokers programs i.e. (Commercial Partner, Premier Partner, Favorable Small Business, etc.)
        + You can now add agreement you have with a company in that company’s profile i.e. (Teaming Agreement, Non-disclosure Agreement (NDA) etc.)
        + Create and add Comments and ratings to that only you or your coworkers can see
        + Configure and manage your Exchanges profile
        + Add and configure sibling Exchanges and communities
        + Configure your help and support, add, and configure support categories and topics
        + We have added the ability to restrict Ip addresses to your exchange
        + You can manage Post
        + Create Newswire categories
        + You can now customize your welcome message to include HTML tags such as bold, underline or links to external URLs, images, or graphics.

# ANALYTICS

Are tools within the exchange that analyze Exchange data and create insights and opportunities.

## 4.1 General

* Applications are available and or priced based on the member’s Exchange, Broker, or license agreement
* Applications can be purchased separately in addition to a license agreement if available on that Exchange

## 4.2 Buying Patterns

* We have added the capability to analyze Buying Patterns
  + - Currently intended for Team and Enterprise Exchanges
    - This Application is still in Alpha Phase
    - It provides administrator managed Exchange and Network based detailed dashboards
    - Uses robust Boolean Searches

## 4.3 Capability Trends

* You can now search for by a capability and see the annual buying trends. The Capability Trends App provides users with quick and reliable access to who is buying, investing, and innovating creating a quick market analysis.
* Research technologies using keywords and analyze federal demand for like technologies
* Be able to see market trends with over all views of awarded contracts, grants, SBIR/STTRs, and Patents
* You can now drill down into each of the views, and see the companies, organizations, institutions. What city and states they are located in. The value and the number of contracts.

## 4.4 Market Reports

* You can now create Market Reports by using key words
  + Create a high-level Market Analysis for a capabilities, products, or services
  + Look at a visual representation of how your company is competing in the Market
  + You can string keywords together using Boolean logic (and, or, and not statements) i.e., (machine learning or artificial intelligence and cloud)
  + Use active dashboard to see how your company compares and drill down into the market
  + Display the contracts, awards, and the awards values of other companies in that market
  + Display your companies awards in the market
  + Display the customers, see who is buying and bought your capabilities, products, and services
  + Display your competitors to complete your high-level market analysis
  + You can now share the report with your team

## 4.5 Partner Finder

* You can now quickly discover companies that could be partners or competition for specific opportunities
  + You can string keywords together using Boolean logic (and, or, and not statements) i.e., (machine learning or artificial intelligence and cloud)
  + Search by location, department, or contract

## 4.6 Socio Economic Analyzer

* You can now search for companies by Small Business Set-asides or Socio-Economic status.
* Search for businesses that are: 8(a), WOSB, EDWOSB, Veteran owned, SDVOSB, NAOB, and Minority owned
* See when a company’s 8(a) status expires
* Searches are broken out by state

# 5. MARKETPLACE

The Marketplace has been optimized making it easier to search for companies either by a company’s name or by a capability

## 5.1 General

* + When searching by a capability you can add filters to narrow your search even more
    - * + We have added In Network and Out of Network Sections. By adding companies to In Network companies you can keep track of the businesses you directly working with or just want to keep track of
        + When searching for a company by name the results will show a company’s parent DUNS and the number of companies underneath that DUNS
        + You are able see and find other Exchanges and their networks if made public
* You can find Brokers, discover what they are offering and how they can help you
* Removed Featured Companies
* We have added an In Network indicator to the initial search returns allowing you to quickly identify if a company is already a part of your (In Network Companies)
* View Funding Rounds- Displays the latest funding round if applicable
* People – See a company’s team and the people that have or have had an association with this Company.
* Certifications – Displays any published company certifications
* Patents- See the patents that are related to a company. Patents are matched to company profiles based on EXACT name match with the United States Patent Office (USPTO)
* Partners and Alliances- display public information around a company’s partners or alliances
* Companies – Displays the sibling DUNS and companies that belong to the Parent Company DUNS
* Contract Vehicle- Displays the contract Vehicles that the company is on
* Subcontract – displays “if reported” the prime company and the subcontract information
* Subcontractors - displays a list of all the companies and the contract information

## 5.2 Options Menu

* + We have added an Options Menu in the banner of every company’s overview that provides quick links making it easier to organize your Exchange
    - * The Options Menu contains the following:
        + Add to Portfolio
        + Add to Opportunity
        + Follow a Company
        + Add/remove to Network (placing or removing the company selected into In Network)
        + Add Comments (add personal comments on a company that only you can see)

## 5.3 Company views / Overview

* + We have reorganized company views and overview sections to be Exchange specific
    - * Content created and viewable in a specific exchange now stays in that exchange.
      * Notes and personal data you have added in a company’s overview in regard to the below fields is viewable or stored as part of publicly available data.
      * You can now enter information in the following fields making it even easier to manage your relations ships with other companies:
        + Under Overview

Company Comments (Legacy Company Intelligence)

Company Contacts

Agreements

* + - * + Under Related Information
      * Certification – add information around certifications that pertain to what important to you
      * Partners and Alliances – add information around a company’s partners or alliance as it pertains to you

**5.4 In Network Companies**

* + With the creation of the In Network Companies you are now able to keep notes, documents, and company perspective information at your fingertips.
* Optimized the Search Marketplace capability to provide faster access to Companies and Capabilities within your own In Network
* Add/remove companies from your own list of companies that you are working with or want to have quick access to.
* Categorize your (In Network companies) with your own custom fields and search by name, capability, and the categories you have designated
* Create custom fields that are important to you and your company enhancing your own information around your In-Network Companies
* Keep track of the relationship manage and record your point of contact so both are readily available when viewing a company that is in your In Network.
* Keep a copy of any agreements or documents that are related to a specific company all in one place
* Add a company to a portfolio directly from In Network

# 6. OPPORTUNITIES

Opportunities are active federal government procurements, industry challenges, and other channels that broadcast the need and demand for products, capabilities, services resources, and technology

## 6.1 General

* Opportunities are broken out into 6 main areas: Dashboard, Contracts, Grants, SBIR/STTRs, Needs, and Challenges
* We have added the ability to string keywords together using Boolean logic (and, or, and not statements) i.e., (machine learning or artificial intelligence and cloud)
* We have added the ability to save your searches
* You are now able to “pin” an opportunity to an opportunity board

## 6.2 Dashboards

* Opportunity dashboards have 3 main areas:
  + - * Search for open opportunities - a quick search based on keywords with check boxes for the 5 opportunity areas, and a drop-down box for (today, yesterday, this week, this month, this year)
      * Opportunity Boards - Contain opportunities that you have shown interest in and have pinned to a board.
      * Opportunity topics - allow you to use keywords, NAICS codes, PSC codes or any combination of the three to create an active dashboard based on open opportunities

## 6.3 Contracts

* Contracts are open federal solicitations and opportunities mainly sourced from Beta.Sam.Gov
* We have added the ability to search multiple NAICS code and PSC codes

## 6.4 Grants

* Grants are opportunities to fund your research and development to assist the Federal Government in solving specific challenges or needs mainly sourced from Grants.gov.
* We have added the ability to search by source, funding type, and status (active, archived, or all)

## 6.5 SBIR/STTRs

* The Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) are needs from the Federal Government that provide companies and organizations with non-dilutive capital
* We have added the ability to search by source, and status (open, closed, or all)

## 6.6 Needs

* Needs are requests that customers post on the Exchange seeking insights, information or approaches to help them solve their requirements or problems

## 6.7 Challenges

* Challenges are opportunities to help customers solve problems in a competitive environment
* There are two types of challenges Exchange challenges and Other (external) challenges
  + Exchange Challenges are generated by Federal Agencies using the Exchange to find a company based on a capability, a service, or a product.
  + Other Challenges are generated from external challenge websites

# 7. RESEARCH

Used to find information on awarded Federal government opportunities dating back to 2014

## 7.1 General

* In all keyword searches you are able to string keywords together using Boolean logic (and, or not statements) i.e., (machine learning or artificial intelligence and cloud)
* You can add NAICS and PSC Codes to keyword searches
* You can string multiple NAICS and PSC codes by separating NAICS or PSC codes with a comma and no spaces.

# 8. INNOVATION & TECH

We have added a capability to source new technologies & products, and the companies, labs, and universities behind them. We are now ingesting data form, US patents, University technology transfer sites, the National Laboratories, innovation websites, and incubator and accelerator websites

## 8.1 General

* In all keyword searches you are able to string keywords together using Boolean logic (and, or, and not statements) i.e., (machine learning or artificial intelligence and cloud)

## 8.2 Universities

* You can search by the name of the university

## 8.3 National Laboratories

**•** You can search by Department

## 8.4 US Patents

* You can search by patent number, subject, company, or person

# 9. SOURCING

Are applications used to locate and manage the resources needed to become successful: Need manager, Investors & Investments, Sponsors, Events and Programs, and Resource Library

## 9.1 General

* In all keyword searches you are able to string keywords together using Boolean logic (and, or, and not statements) i.e., (machine learning or artificial intelligence and cloud)

## 9.2 Need Manager

* Broadcast your needs to your Exchange or other Exchanges creating collaboration around questions, capabilities, and technologies.
  + Provide a full description of your published need
  + Provide clear and concise instructions, making sure you get the answers you need
  + Allow questions, creating even more collaboration with a question and answers
  + Add “due by” dates (receive all questions by, responses due by)

## 9.3 Investors & Investments

* Search and find Investors
* Search to find the Investments that have made in companies
* You can search by investor name, company name, or topic area
* Bring back information around:
  + - * + Funding Round
        + Total Funds received
        + Last funding date
        + Type funding
        + Amount of funding
        + Number of investors, and who those investors are

## 9.4 Sponsors

* Exchanges and Brokers now have the ability to display and manage your sponsors

## 9.5 Events and Programs

* For Exchanges and Brokers, we have added an application that lets you see or add upcoming events and programs
  + Exchanges and Brokerages can now advertise custom events and programs
  + You can now create your own categories based on the programs that your Exchange offers
  + You can create links to those events and programs for more details or RSVP type functions
* For members based on your Exchange permissions or license level you can see upcoming local, regional, and national events
* Based on your Exchange, you can see available offered programs designed to help you grow, accelerate, or be a part of a community
* Search for events or programs by key words or categories

## 9.6 Resource Library

* We have added the ability to create a resource library.
* A repository where you can add tools, documents, articles, and other forms of information to help your members.
* Topics are searchable by keyword and or category
* View by when a topic was posted (week, month, and quarter)

# 10. TOOLS

Are applications that are used to aggregate, interrogate, summarize, or give perspective on data within the Exchange

## 10.1 General

* Applications are available and or priced based on the member’s Exchange, Broker, or license agreement
* Applications can be purchased separately in addition to a license agreement if available on that Exchange

## 10.2 Challenge Manager

* You can now create a Challenge and broadcast it out to the Exchange directly to the Marketplace
* Challenge Manager allows members to source products, services, technologies, and companies outside traditional channels exposing opportunities and finding companies and capabilities faster, increasing the number of sourcing channels, and reducing cost
* You can create, configure, and manage challenges on the Exchange around your processes
* Collaborate internally and externally, share insights and information throughout the entire process, creating transparency
* You can choose the option to broadcast challenges to other Exchanges and Brokers
* The Challenge Manager has customizable processes and phases
* You can allow Exchange members to ask questions creating even more transparency and collaboration
* You can keep the challenge anonymous allowing you to see the results without being bombarded with phone calls and inquires
* Document Challenge learnings
* Source and down-select companies
* Search for companies and capabilities across multiple channels (i.e., awards, grants, SBIR/STTRs, patents, lab tech, etc.)
* Add / associate Challenge attachments and documents and external URLs
* Post Challenge updates to members
* Create instant contact lists to engage companies directly

## 10.3 Company Portfolios

* You can now add companies to a portfolio and compare performance
  + You can compare and view total Revenue
  + Compare and view the number of departments and agencies companies have contracts with
  + See the amount of funding raised by a company
  + Compare and view how many unique contracts a company has
* Information on customers, award amounts, and contracts are now based on the last 3 years of performance
* You can compare a maximum of 5 companies at one time out of a portfolio
* Get a summary overview of each company in your portfolio
  + See up to 6 years of performance, revenue, average number of employees, and contracts
* You can now add companies from a portfolio to an opportunity board

## 10.4 Contract Vehicles

* Analyze federal contract vehicles and discover awards made to prime contract holders.
* We have added the ability to add a Vehicle and analyze a contract award number to find the other companies on that contract vehicle and the amount of contract and revenue that contract vehicle is generating

## 10.5 Contract points of Contact

* We have now bought the capability to find Contracting Officers, names, phone numbers and email address within Federal Departments, Agencies, and Offices**.**

## 10.6 Names Research

* Search for and individual points of contact from over the companies in the Exchange
  + The Exchange looks through the records of Sam.Gov, Crunchbase, the Exchange, and other websites to capture and display points of contact
  + Use first name, last name, or both to search
  + Break out results, by Sam.Gov, Crunchbase, or the Exchange

## 10.7 Opportunity Boards

* You can now create and manage Opportunity Boards
  + Create customer or market focused opportunity boards to group opportunities of interest
  + Track progress against submission goals. Capture activity timelines, attach important files, create focused notes
  + Identify potential partners or competitors, analyze competition, research past contracts and market trends and patterns
  + Share your opportunities with colleagues

## 10.8 Risk Management (BETA)

* We have added the ability to create a high-level configurable risk analysis, Identify, manage, and mitigate risk in the market
  + You can enter a description and background
  + Configure the terms to match your processes around: timing, status, strategy, risk level, risk magnitude, impact, and likelihood
  + Display and configure multiple mitigation Strategies
  + List the impacts, describe the indicators, list the stakeholders, list assumptions
  + There are multiple date categories (created, last updated, Identified, planned closed, and mitigated by)
  + You can also share with you team

# 11. COLLABORATION

We have combined the ability to search for federal market opportunities, award researches, and market intelligence with online social network capabilities

## 11.1 General

* Collaboration applications focus on working with another person or group to achieve and create opportunities
* View messages
* Create and view connections with Exchange members
* Follow other Exchange members and see who is following you on the Exchange
* See who has viewed your profile
* Follow companies that are of interest

## 11.2 Communities

* We have added the functionality to create and manage communities of interest
* Communities are a collaboration space with controlled exposure and membership
* Share posts, calendars, documents, and opportunity boards with a collective group of like-minded and similarly focused users.
* Community Types (Open, Standard, or Private)

## 11.3 Group Management

* You can now create and manage groups, add them to portfolios, opportunity boards, and email list

## 11.4 Messaging

* You can now collaborate with other members on the Exchange.
* Send and receive messages
* Track and keep older messages

## 11.5 People

* We have added searchable profiles for members in your Exchange
* View a member’s contact information
* For Exchanges and Brokers create entire configurable profiles for your members i.e. (company and title, experience, certificates, education, etc.)
* In network and out of network identifier