



PROTASIS

Propositions Management System

User Manual

v. 1.0.1 (2024-11-12)

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1 Introduction

The **PROTASIS** Propositions Management Application is a web-based tool designed to manage Calls for propositions and Propositions efficiently. The application helps organise, store, and manage the lifecycle of propositions, from creation to evaluation, and supports advanced analytics and reporting. This manual provides instructions for using the application, including managing propositions, accessing reports, and using the analytics features.

1.1 Calls and Propositions

PROTASIS revolves around two main concepts: **Calls** for propositions and the **Propositions** themselves. Although these are interdependent, it's essential to view their life cycles as distinct processes.

Calls are formal invitations or requests issued by an organization for **Proposals, Expressions of Interest, Tenders, or Framework Agreements** to undertake a specific project or provide certain services. Calls initiate the process of collecting responses from interested parties and are typically followed by an evaluation and selection process.

Once a Call is created in PROTASIS, it moves to the "Active" state, meaning it is open to receiving propositions or responses from interested parties. The Editor and Manager of each department enters the necessary data of the pertinent Call of their department. When the submission deadline is reached, the Call automatically transitions to the "Closed" state, indicating it is no longer accepting responses and is ready for the evaluation phase

Propositions are formal responses submitted to a Call. They outline the proposer's approach, methodology, and proposed resources to fulfil the requirements of the Call.

A Proposition is always associated with a specific Call. Filing a Proposition record in PROTASIS indicates the development group's initial interest in responding to the Call, setting the Proposition's state to "In Progress" as they prepare the response details. When ready, the proposer can choose to submit the Proposition, transitioning it to the "Submitted" state. If the decision is made not to proceed, the Proposition is marked as "Dropped." Once submitted, the Proposition enters the evaluation stage, following one of two possible paths depending on its type. For certain types of propositions, the first step is to determine whether it will be shortlisted. If shortlisted, LDK prepares and submits a proposal which proceeds to the final evaluation, where it can be either "Awarded" (accepted) or "Rejected" if it does not meet the selection criteria. For other proposition types, the evaluation leads directly to the final decision without a shortlisting step, resulting in either an "Awarded" or "Rejected" outcome. This workflow provides a structured and transparent progression from creation to final decision, allowing for efficient tracking and management of each proposition.

Figure 1 illustrates the state transition of a Proposition in form of a diagram, in which, colours indicate state categories: white ovals for creation, yellow rectangles for active or ongoing stages, white diamonds for decision points, and red rectangles for final states.

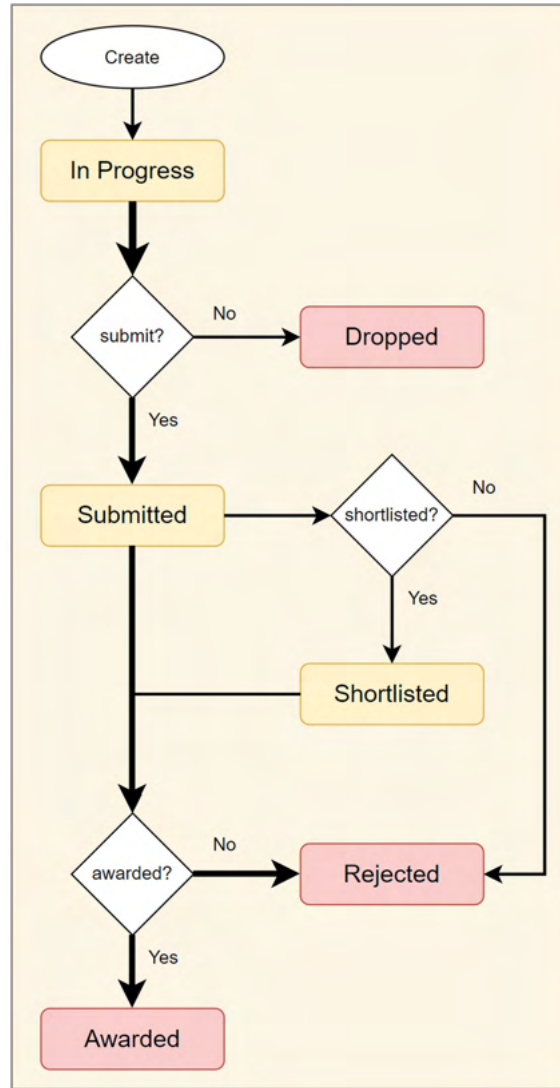


Figure 1: State transition diagram of Propositions

1.2 User roles and permissions

In the PROTASIS application, user roles and permissions are organised per department to ensure secure and role-specific access. The updated roles are as follows:

- **Staff Member:** This role provides read-only access to propositions and calls within their assigned department(s). Staff Members can view propositions, reference data, calls and view analytics and statistics concerning their department but cannot make any changes. This role is designed for team members who need to monitor department activities without direct involvement in editing or managing data.
- **Editor:** Editors have the ability to create, edit, and delete propositions and calls within their assigned department(s). This role is intended for users who are actively involved in managing

the content and details of propositions and calls but do not require access to system-wide analytics.

- **Manager:** Managers have full access to proposition and call management for their assigned department(s), including the ability to create, edit, and delete. In addition, Managers can access department-specific analytics and statistical information, allowing them to evaluate proposition performance and trends within their department.
- **Administrator:** The Administrator has the highest level of access and control across all departments. In addition to managing propositions and calls, they are responsible for user account management, assigning roles, and configuring system-wide settings.

Each user is assigned at least one role within at least one department, but users may have multiple roles across different departments, providing flexibility in managing permissions and responsibilities across various parts of the organisation.

2 Getting Started

2.1 Logging into PROTASIS

Upon accessing the application, users will be presented with a login form (Figure 2). To access the system:

- Enter your username and password.
- Click the 'Login' button.

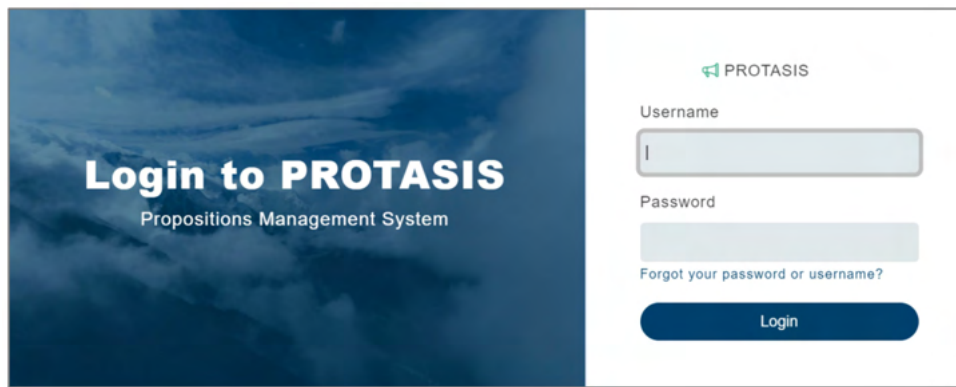


Figure 2: Login form

2.2 Retrieve your password

In case you forget your password or username, follow these steps to reset it:

- Click the 'Forgot your password or username?' link located below the login form.
- You will be prompted to enter the email address associated with your account.
- After entering your email, click the 'Reset my password' button.
- The system will send an email with a link to reset your password.
- Check your email inbox (and the spam/junk folder if necessary) for the reset email.
- Click on the password reset link in the email, which will direct you to a secure page where you can create a new password.
- Enter a new password and confirm it by typing it again in the confirmation field.
- Click 'Reset my password' to finalize the password change.
- Once the password is successfully updated, return to the login page, and use your new password to log in.

3 Main dashboard

3.1 Overview of the main dashboard

Once logged in, the main dashboard (Figure 2) is your entry point to the system’s core functionalities. The dashboard provides quick access to recent propositions and calls and navigation links to create or view propositions, generate reports, and access analytics.

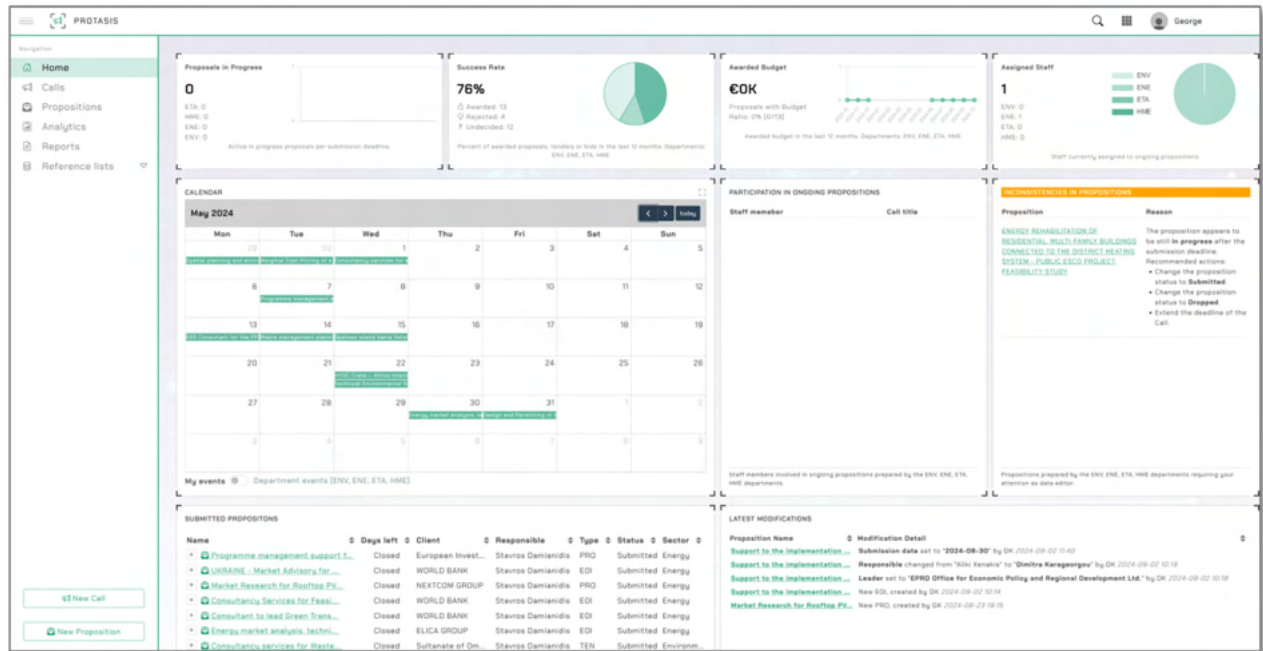


Figure 3: Main page of PROTASIS

3.2 Header

The header of the PROTASIS application provides key functionality, including a **full-text search** over the metadata of propositions and calls, allowing users to quickly locate relevant information. It also offers direct access to the **change password** page and the option to **exit the application**. Additionally, privileged users have access to their **profile settings**, enabling them to manage their personal preferences and system roles.

3.3 Main menu

The **main menu** of the PROTASIS application serves as the central navigation hub, providing users with quick access to the system’s key features and functionalities. Located on the left side of the screen, the main menu includes the following options:

- **Home:** This option directs users back to the main dashboard, offering an overview of ongoing propositions, deadlines, and key metrics.

- **Calls for Propositions:** Provides access to the list of all active and archived calls, allowing users to view, create, or edit calls for propositions.
- **Propositions:** Displays a list of propositions, where users can manage their status, view details, and take action on specific propositions.
- **Analytics:** Directs to the statistical analysis tool, offering users the ability to perform detailed evaluations of propositions, allowing users to analyse success rates, awarded budgets, and staff involvement with precision. By providing structured data, this tool helps users draw meaningful insights and make informed decisions based on the proposition metrics. This option is available only to Administrators and Managers.
- **Reports:** Allows users to generate specific reports on propositions and calls, which are exported in Excel format for further analysis. This option is available only to Administrators.
- **Reference Lists:** Provides users with the ability to manage key entities such as users, organisations, legal entities, departments, sectors, sub-sectors, country groups, and currencies, ensuring consistency and control over these essential datasets across propositions. This option is available only to Administrators and Editors.

3.4 Summary widgets

These widgets are visible only to privileged users.

At the top of the screen, provided that the user has the necessary rights, four key summary widgets appear that enable managers and administrators to monitor the overall performance and progress of propositions, track success rates, oversee awarded budgets, and manage staff assignments across different departments and propositions in real-time (Figure 4).

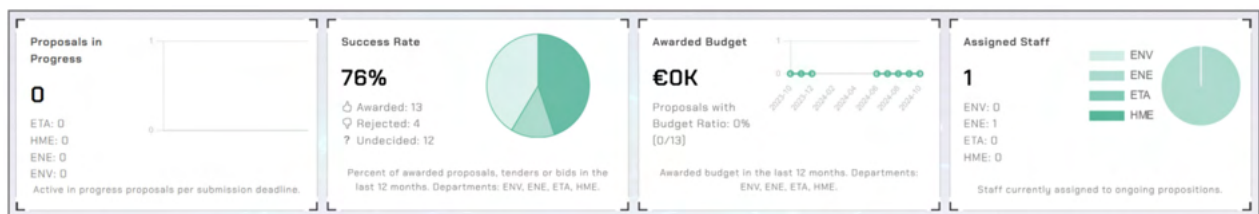


Figure 4: Summary widgets

The summary widgets provide detailed information on the following:

- **Propositions in Progress:** Shows the current number of propositions in progress, including how many are planned, submitted, awarded, or rejected. This helps the user track the overall status of propositions at a glance.
- **Success Rate:** Displays the success rate of propositions as a percentage. The total number of awarded propositions compared to submitted ones is shown as a pie chart, providing a visual representation of success and progress.

- **Awarded Budget:** Displays the total budget awarded for propositions. This is updated based on the successful propositions and their associated budgets.
- **Assigned Staff:** Lists the number of staff members assigned to ongoing propositions. The pie chart shows the proportion of assigned staff member by department.

3.5 Calendar

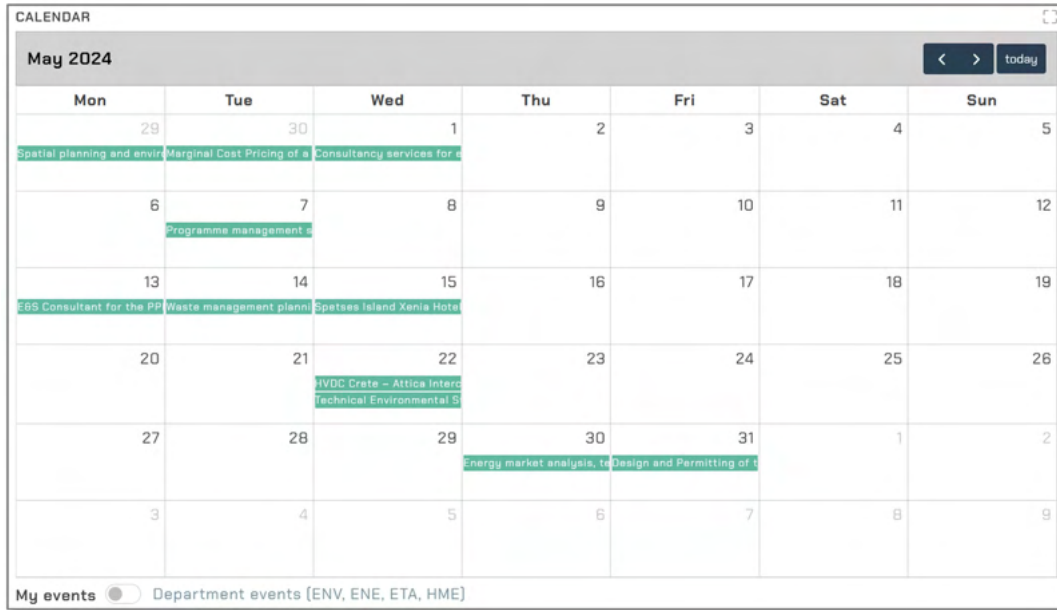


Figure 5: PROTASIS calendar

The calendar functionality in the PROTASIS application is designed to help users stay organized by displaying key deadlines. It shows **submission deadlines** of calls clearly, and with a faint background, it highlights **clarification deadlines** to ensure users are aware of important dates related to ongoing propositions. By default, the calendar only displays deadlines for propositions in which the user is directly involved, allowing for a focused view. However, users can choose to see a broader range of events by activating the **switch** at the bottom of the calendar that reveals **department events**, ensuring they remain informed about all relevant activities and deadlines within their department.

By clicking on a deadline in the calendar, users are directed to the call factsheet, where they can access detailed information about the specific call.

3.6 Additional Dashboard Sections

The **Latest Modifications** section provides a real-time overview of recent changes made to propositions or calls within the system. It displays information such as the proposition or call title, the type of modification, and the user who performed the update. This section ensures transparency and helps users stay up to date with the latest developments relevant to their work, making it easier to track changes and respond to them accordingly.

The **Submitted Propositions** section lists all propositions that have been officially submitted by the department of the user for review. Each entry includes critical information such as the proposition title, submission date, client, and the current status. This section allows users to easily monitor the progress and follow-up actions related to submitted propositions.

The **Ongoing Propositions** section highlights the involvement of staff in active propositions. It displays a list of active propositions, the individuals participating, and provides direct access to the corresponding proposition pages.

The **Inconsistencies in Propositions** section is available only to privileged users, such as managers or administrators, who are responsible for maintaining data integrity. It identifies and flags any data discrepancies or errors within submitted or ongoing propositions, such as missing information, conflicting details, or misaligned data.

4 Calls for Propositions

4.1 Call types

In procurement and contracting, organizations utilize various types of calls to invite suppliers, contractors, or partners to participate in projects, supply goods, or deliver services. Each call type serves a distinct purpose within the procurement lifecycle and is tailored to meet the unique needs of the project or organization. For example, an **Expression of Interest** acts as an initial outreach, allowing organizations to gauge the interest and suitability of potential vendors before formal engagement. **Proposals** and **Tenders** represent more detailed processes, with Proposals focusing on a vendor's unique solution and approach to meet the client's objectives, while Tenders are primarily price-driven and follow a competitive bidding process based on strict technical specifications.

For long-term or recurring needs, **Framework Agreements** provide a structure for ongoing relationships with one or more suppliers, allowing for repeated transactions under agreed-upon terms. Individual **FA Contracts** are issued within these frameworks for specific purchases, simplifying procurement processes over time. **Direct Assignments** enable organizations to award contracts directly to specific vendors in cases requiring urgency or specialized expertise without a competitive process. In PROTASIS, the **Other** category is designated for unique or unconventional procurement needs that do not align with traditional classifications.

Each of these call types, supported by PROTASIS, offers structured processes and selection criteria to help organizations achieve their goals efficiently, balancing considerations like cost, quality, expertise, and project timelines.

4.2 The Calls List Page

The Calls List Page offers a comprehensive view of calls with various tools and options for filtering, viewing details, creating new entries, and exporting data for ease of use and management.

To access the Calls List Page (Figure 6), navigate from the main menu by selecting "Calls." This will direct you to the Calls list page, where the main characteristics of the calls are displayed in a structured, tabular format.

The screenshot displays the 'Calls for Propositions' interface. At the top, there is a search bar and a 'NEW' button. Below the search bar is a table with columns: Title, Type, Sector, Department, Days left, Proposition, and Client. The table contains 15 rows of data. To the right of the table is a 'Filters' sidebar with a 'NEW' button and a 'Clear Filters' button. The sidebar includes filters for Sector, Department, Client, Countries, and Type. Below the filters, there is a note: 'List of calls assigned to the departments: ENV, ENE, ETA, HME'.

Title	Type	Sector	Department	Days left	Proposition	Client
81302574- Study Technical and	Proposal	Energy	Energy	Closed	SD	GIZ
ΑΕΠΟ ΦΡ Μυσοβορύι σύνοψη	Proposal	Energy	Energy	Closed	SD	A. APABIAHΣ
UKRAINE - Market Advisory for	Expression of Interest	Energy	Energy	Closed	SD	WORLD BANK
Provision of Construction Supp...	Proposal	Energy	Energy	Closed	SD	AYTOKINHTOΔPOMO...
Market Research for Rooftop PV	Proposal	Energy	Energy	Closed	SD	NEXTCOM GROUP
Green transformation in consul...	Direct Assignment	Energy	Energy	Closed	SD	European Bank f...
PR 01854 North Macedonia Dec...	Proposal	Energy	Energy	Closed	SD	European Bank f...
Consultancy Services for Feasi...	Expression of Interest	Energy	Energy	Closed	SD	WORLD BANK
UZBEKISTAN Energy Efficiency	Proposal	Energy	Energy	Closed	SD	European Bank f...
Almiros TOD - Greece	Proposal	Energy	Energy	Closed	SD	CUBICO
Consultant to lead Green Trans...	Expression of Interest	Energy	Energy	Closed	SD	WORLD BANK
Framework Agreement to Support...	Framework Agreement	Energy	Energy	Closed	SD	European Invest...
Technical consultant - Kosovo	Expression of Interest	Energy	Energy	Closed	SD	WORLD BANK
Marginal Cost Pricing of a Com...	Proposal	Energy	Energy	Closed	SD	BIOLAND
Programme management support f...	Proposal	Energy	Energy	Closed	SD	European Invest...
Energy market analysis techni...	Expression of Interest	Energy	Energy	Closed	SD	ELICA GROUP

Figure 6: List of calls for propositions

The "NEW" button, located in the top-right corner, directs the user to the New Call data entry form, enabling the creation of a new call record.

4.2.1 Call Table Overview

Each call is displayed as a row in the table, with the following main characteristics shown as columns:

- **Title:** The name of the call. Clicking on a title will navigate the user to the factsheet page of that specific call, where the full list of call attributes is displayed (see section 4.3).
- **Type:** The category of the call (e.g., Proposal, Expression of Interest).
- **Sector:** The sector that the call belongs to, such as Energy or Environment.
- **Department:** The department responsible for the call.
- **Days Left:** Displays the status of the call (e.g., "Closed") or the number of days left until its deadline.
- **Proposition:** A status indicator for whether the call has a linked proposition, showing the initials of the proposition coordinator.
- **Client:** The name of the client associated with the call.
- **Countries:** The country or countries associated with the call, indicated by a country code.
- **Region:** The geographical region associated with the call.
- **Timestamp:** The date and time the call record was created or modified.
- **Deadline:** The due date for submissions related to the call.

Pagination and Entry Limit: The results are shown in pages, with an option at the top to specify the number of entries displayed per page (e.g., 10, 20, 50). This allows users to manage the list size according to their preference.

Export Options: Users have the option to export the entire list of calls in various formats, including CSV, a printer-friendly format and Excel, using the export buttons provided above the table. This feature is useful for offline viewing or further analysis.

Responsive Design: The table is responsive, meaning that depending on the display width, some columns will be visible directly in the list, while others will be accessible only after clicking the Plus icon on the left side of each row. This design allows users on smaller screens or devices to view essential information without clutter while still having access to all details in the expanded view.

4.2.2 Call filters

A set of filters on the right side allows users to refine the list of calls based on specific criteria:

- **Active Calls switch:** By default, all recorded calls are displayed in the list, including those that have been pursued, abandoned, or are still active. A switch is available to filter for only active calls if desired.
- **Sector:** Filter calls by sector, such as Energy or Environment.
- **Department:** Filter calls by the department handling them.
- **Client:** Filter based on the client organization.
- **Countries:** Filter calls by associated countries.
- **Type:** Select a specific call type to filter by (e.g., Proposal, Expression of Interest).

These filters help users narrow down their search results. To reset all filters, use the "Clear Filters" button.

4.3 Call Factsheet

By clicking on the title of a Call in the Calls List Page, the user is directed to the **Call Factsheet** page (Figure 7), where they can view detailed information about the selected Call. This page provides a comprehensive overview of the Call's attributes, including its purpose, client details, associated sectors, budget, deadlines, and any additional notes or requirements. From the Call Factsheet, users with appropriate permissions (Editors, Managers, and Administrators) can also edit or update the information, as well as create or link Propositions in response to the Call.

CALLS / CALL & PROPOSITION

UKRAINE - Market Advisory for Ukraine Energy Sector

Expired

Call **Proposition**

Company department *
Energy

Specific division or sector within the company involved in the call.

Client *
WORLD BANK

The contracting authority that issues the call for propositions.

Sector *
Energy

The specific domain or industry targeted by the call.

Sub-sectors

The specific sub-sectors targeted by the call.

Framework Programme

The overarching scheme or initiative under which the call for propositions is issued.

Notes

Any additional information regarding the call.

URL

The web address where more information about the call can be found.

Donor

The entity providing the financial resources for the propositions, in case it differs from the client.

Countries
Ukraine

The country or countries that are primarily involved or targeted by the call.

Country Group

A region or a collection of countries.

Budget
4000.0

The total amount of funds allocated for the propositions resulting from the call.

Budget in the contractual currency
4545.0 USD

The total amount of funds allocated for the propositions resulting from the call, expressed in the currency specified in the contract's financial terms.

Call type *

Expression of Interest

Proposal Tender

Framework Agreement

FA Contract

Direct Assignment

Other

Submission deadline *
2024-02-05

Clarification deadline

[EDIT CALL](#)

Last updated by George Karavokiros on 28 Aug 2024, 8:31 p.m.

Figure 7: Call factsheet

4.4 Creating and Editing a Call

The Call Factsheet form in PROTASIS is available for users with **Editor**, **Manager**, or **Administrator** roles, allowing them to create new calls or modify existing ones (Figure 8). Users can access this form by clicking the "NEW" button located in the top right corner of the Calls list page or by selecting the "New Call" button in the bottom left corner of the screen. For editing an existing call, users can navigate to the Calls list, locate the specific call, and click on its title to open the form in edit mode.

Within the form, mandatory fields are clearly marked by displaying their titles in **bold** with an asterisk (*), indicating the required information that must be completed before saving.

The form also includes an **auto-complete widget** for selecting multiple countries associated with the call. To use this feature, start typing the name of a country; a list of matching options will appear, and each selected country will be added to the list. Additionally, if predefined **country groups** are available,

users can select a relevant group in which the call is associated, alongside any specific countries they may have specified.

For existing calls, a **Delete** button is located at the bottom of the form. Clicking this button opens a confirmation window (as shown in the image), prompting the user to confirm the deletion. This action permanently removes the call and all associated proposition data. If the user selects "Cancel," the call and its data remain unchanged, providing an option to reconsider the deletion.

CALLS / CALL FOR PROPOSITION

Title *

Code
A unique string used to identify and reference the specific call.

Company department *
Specific division or sector within the company involved in the call.

Client *
The contracting authority that issues the call for propositions.

Sector *
The specific domain or industry targeted by the call.

Sub-sectors
The specific sub-sectors targeted by the call.

- Solid Waste Management
- Recycling
- Environmental Impacts
- Pollution Control

Framework Programme
The overarching scheme or initiative under which the call for propositions is issued.

Notes
Any additional information regarding the call.

URL
The web address where more information about the call can be found.

Donor
The entity providing the financial resources for the propositions, in case it differs from the client.

Countries
The country or countries that are primarily involved or targeted by the call.

Country Group
A region or a collection of countries.

Budget
The total amount of funds allocated for the propositions resulting from the call.

Budget in the contractual currency

Call type *

- Expression of Interest
- Proposal
- Tender
- Framework Agreement
- FA Contract
- Direct Assignment
- Other

Submission deadline *

Clarification deadline

* Required field

SAVE **CANCEL**

Figure 8: Form to edit or create a new call factsheet

5 Managing Propositions

5.1 The Propositions List Page

The Propositions List Page provides a detailed view of all propositions and expressions of interest, with tools and options for filtering, viewing details, creating new entries, and exporting data for efficient management.

To access the Propositions List Page (Figure 9), navigate from the main menu by selecting "Propositions." This will direct you to the Propositions List Page, where the main attributes of each proposition are displayed in a structured, tabular format.

The screenshot displays the 'PROPOSITIONS' interface. At the top, it says 'Proposals and Expressions of Interest'. Below this is a table with columns: Name, Days left, Client, Responsible, Type, and Status. The table contains 10 entries, all with a status of 'Submitted'. To the right of the table is a 'Filters' sidebar with a '+ NEW' button. The filters include: Active propositions (checkbox), Sector (Environment), Department (Environment), Client (---Any---), Type (Tender), Status (Submitted), and Period (From: January 2024, To: May 2024). At the bottom right, there is a note: 'List of propositions assigned to the departments: ENV, ENE, ETA, HME'.

Name	Days left	Client	Responsible	Type	Status
+ Consultancy services for Waste...	Closed	Sultanate of Om...	Stavros Damianidis	TEN	Submitted
+ National Archaeological Museum...	Closed	David Chipperfi...	Stavros Damianidis	TEN	Submitted
+ Provision of Urban / Spatial P...	Closed	Εταιρεία Ακινήτ...	Stavros Damianidis	TEN	Submitted
+ Subsea electrical interconnect...	Closed	Copelouzou Grou...	Stavros Damianidis	TEN	Submitted
+ Advancing waste collection and...	Closed	United Nations ...	Stavros Damianidis	TEN	Submitted
+ Consultancy services for estab...	Closed	Abu Dhabi Gover...	Stavros Damianidis	TEN	Submitted
+ EBS Consultant for the PPP Pro...	Closed	European Bank f...	Stavros Damianidis	TEN	Submitted
+ Spetses Island Xenia Hotel Ref...	Closed	MRP Greece IKE	Stavros Damianidis	TEN	Submitted
+ HVDC Crete – Attica Interconne...	Closed	Ανεξάρτητος Διδ...	Stavros Damianidis	TEN	Submitted
+ Design and Permitting of the L...	Closed	Alcatel Submari...	Stavros Damianidis	TEN	Submitted

Figure 9: List of propositions

By clicking on the “New” button the user is directed to the Edit form to create a new Proposition (see section 5.2), in response to a Call.

5.1.1 Proposition Table Overview

Each proposition is displayed as a row in the table, with the following main characteristics shown as columns:

- **Name:** The title of the proposition. Clicking on a title will navigate the user to the factsheet page for that specific proposition, where additional information is available (see section 5.2).

- **Days Left:** Displays the status of the call associated with the proposition (e.g., "Closed") or indicates the number of days left until its deadline.
- **Client:** The client related to the proposition.
- **Responsible:** The individual in charge of the proposition, typically the lead for the submission.
- **Type:** The type of proposition, such as a Tender or Proposal.
- **Status:** The current state of the proposition (e.g., "Submitted," "In Progress").
- **Sector:** This field indicates the main industry or domain relevant to the proposition, such as Energy or Environment. It helps categorize the proposition according to the sector it addresses.
- **Department:** The specific department within the organization responsible for preparing and managing the proposition. This is represented by an abbreviation (e.g., ENE for Energy) and defines the internal team handling the proposition.
- **Leader:** The entity designated as the leader of the proposition effort. This may be an external partner who is accountable for overseeing the proposition process and ensuring its timely submission.
- **Budget:** The estimated or allocated budget for the proposition, detailing the financial resources required or proposed to meet the project's objectives.
- **Share:** The percentage of the total project budget or resources that the organisation anticipates receiving or managing if the proposition is awarded.
- **Submission Date:** The date when the proposition is submitted to the client.

Pagination and Entry Limit: Results are displayed in pages, with an option at the top to specify the number of entries per page (e.g., 10, 20, 50). This setting allows users to manage the size of the list according to their preference.

Export Options: Users have the option to export the entire list of propositions in various formats, including CSV, Excel, and a printer-friendly format, using the export buttons provided above the table. This feature is helpful for offline analysis or record-keeping.

Responsive Design: The table is responsive, meaning that some columns may be displayed directly in the list on larger screens, while others can be accessed by clicking the Plus icon on the left side of each row. This design allows users on smaller screens to view essential information without clutter, while still having access to all details in the expanded view.

5.1.2 Proposition Filters

A set of filters on the right side of the page allows users to refine the list of propositions based on specific criteria:

- **Active Propositions switch:** By default, all recorded propositions are displayed, regardless of whether they are active, submitted, or closed. A switch is available to filter for only active propositions if desired.
- **Sector:** Filter propositions by the relevant sector, such as Environment or Energy.
- **Department:** Filter propositions by the department responsible for their preparation.
- **Client:** Filter based on the client organization associated with the proposition.

- **Type:** Filter propositions by type, such as Tender or Expression of Interest.
- **Status:** Select a specific status (e.g., "Submitted," "In Progress") to filter propositions accordingly.
- **Period:** Use date fields to set a date range and filter propositions based on the closing date of the call.

These filters help users narrow down their results efficiently. To reset all filters, use the "Clear Filters" button.

5.2 Proposition Factsheet

When a user clicks on the title of a proposition listed on the **Propositions List Page**, they are directed to the detailed **Proposition Factsheet** page (see Figure 10). This page provides comprehensive information on the selected proposition, including its current status (e.g., In Progress, Dropped, Submitted, Awarded, Rejected, Shortlisted), the anticipated share of the total project budget or resources the organization expects to manage, and other key details. The factsheet is designed to give users quick access to essential insights, enabling informed decision-making and efficient tracking of proposition progress and status updates.

By clicking on the "Call" tab, the user is redirected to the related Call Factsheet page (refer to section 4.3). This page provides comprehensive details about the call associated with the proposition, offering relevant information and context for further evaluation and decision-making.

CALLS / CALL & PROPOSITION

UKRAINE - Market Advisory for Ukraine Energy Sector

Expired

Call
Proposition

Responsible *

The person within the organisation accountable for the delivery and success of the proposition.

Contributors

Staff member that have a role in supporting or executing the proposition.

Company *

Legal entity involved in the proposition.

Title

Abbreviation

A short form or acronym of the title, used for easier reference.

Code

A unique identifier assigned to the proposition for tracking and administrative purposes.

Status *

In Progress

Dropped

Submitted

Shortlisted

Awarded Rejected

Role

Leader Partner

Subcontractor

Submission date

The date on which the proposition was officially submitted to the call or request.

EDIT PROPOSITION

Budget

The total financial requirement for the entire project.

Budget in the contractual currency
 USD
The total financial requirement for the entire project, expressed in the currency specified in the contract's financial terms.

Share

The budget amount allocated for the company's contribution to the project.

Share in the contractual currency
 USD
The budget amount allocated for the company's contribution to the project, expressed in the currency specified in the contract's financial terms.

Score

The score that the proposal has received.

Notes

Additional information or comments related to the proposition that provide context or clarify specific points.

Project leader

The organization designated to coordinate the project stemming from the proposition.

Project ID

A unique code or identifier assigned in the event the proposition materializes into a project.

Project partners

Other entities or organizations collaborating or participating in the project.

Figure 10: Proposition Factsheet page

5.3 Creating and Editing a Proposition

The **Proposition Edit** page in PROTASIS is accessible to users with **Editor**, **Manager**, or **Administrator** roles, allowing them to create new propositions or modify existing ones (Figure 11). Users can open this form by selecting the "NEW" button on the Propositions List page for creating a new proposition or by clicking on the title of an existing proposition to enter edit mode.

PROPOSITIONS / Proposals and Expressions of Interest

Title

Abbreviation

A short form or acronym of the title, used for easier reference.

Code

A unique identifier assigned to the proposition for tracking and administrative purposes.

Company *

Legal entity involved in the proposition.

Responsible *

The person within the organisation accountable for the delivery and success of the proposition.

Call *

The specific request or opportunity to which the proposition is being submitted.

Contributors

Staff member that have a role in supporting or executing the proposition.

Status *

In Progress
 Dropped
 Submitted
 Shortlisted
 Awarded
 Rejected

Role

Leader
 Partner
 Subcontractor

Submission date

The date on which the proposition was officially submitted to the call or request.

Budget

The total financial requirement for the entire project.

Share

The budget amount allocated for the company's contribution to the project.

Score

The score that the proposal has received.

Project leader

The organization designated to coordinate the project stemming from the proposition.

Project ID

A unique code or identifier assigned in the event the proposition materializes into a project.

Project partners

Other entities or organizations collaborating or participating in the project.

Notes

Additional information or comments related to the proposition that provide context or clarify specific points.

* Required field

Files

Name:

File: No file chosen

Delete:

Name:

File: No file chosen

Delete:

Figure 11: Form to edit or create a new proposition factsheet

The form includes several mandatory fields, marked in bold with an asterisk (*), which must be completed to successfully save the proposition. This structure ensures that critical information required for accurate proposition tracking and management is entered consistently.

Key fields on the Proposition Edit page include:

- **Title, Abbreviation** and **Code** fields allow users to specify a unique identifier and name for the proposition, facilitating easy reference and searchability within the system. Please note that the title chosen for the proposition, if specified, should differ from the Call title.
- **Countries and Country Group**: Using an auto-complete widget, users can add multiple countries associated with the proposition by typing part of the country's name. Additionally, a predefined country group can be selected if applicable, in conjunction with individually selected countries.
- **Budget and Budget in the Contractual Currency**: These fields capture the financial allocation for the proposition, both in the default currency and, if applicable, in the currency specified in the contract.
- **Submission Date**: Users can specify the submission date of the Proposition.

Files related to the Proposition can be uploaded alongside the proposition factsheet.

The **Save** button, located at the bottom of the form, allows users to save their changes, while the **Cancel** button discards any unsaved edits and returns the user to the Propositions List page.

For existing propositions, the form includes a **Delete** button, which prompts a confirmation window when selected, ensuring that users confirm their intent to permanently remove the proposition and all related data.

6 Analytics

6.1 Statistical Analysis

The statistical analysis feature in PROTASIS is available to **Managers** and **Administrators** (Figure 12). It provides users with insights into proposition data across multiple dimensions, allowing for a comprehensive breakdown of information based on specific parameters.

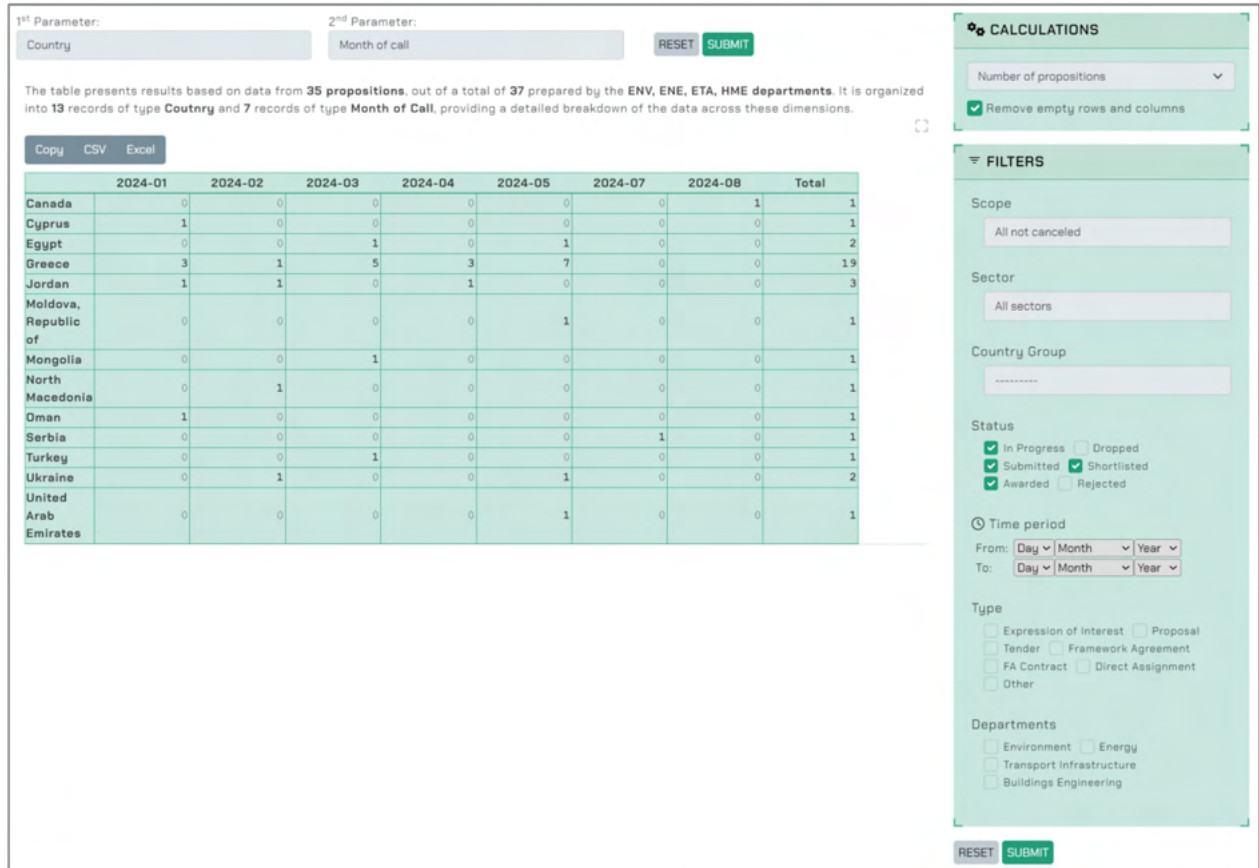


Figure 12: Analytics page

This analysis consists of three main components:

1. **Calculation:** Users can select from four different calculations to be applied to the proposition data:
 - **Number of Propositions:** Counts the total propositions within the selected parameters.
 - **Budget:** Sums the budgets of the propositions matching the specified criteria.
 - **Average Budget:** Calculates the average budget across the selected propositions.
 - **Success Rate:** Determines the rate of propositions awarded relative to the total submitted.

2. **Results Table:** Once a calculation is selected, the results are presented in a table format. The table structure is defined by two dimensions, which are chosen by the user as parameters. These parameters organize the data across rows and columns, providing a detailed breakdown. The available parameters include options such as call type, country, month of call, department, and other relevant dimensions. This setup allows users to view the calculation results in a structured way, categorized by the selected dimensions for easy comparison.
3. **Filters and Options:** The analysis is further customizable with filters that refine the data displayed in the table. Users can filter by scope, sector, country group, status, time period, type, and department.

Additionally, users have options for exporting the table results in various formats (Copy, CSV, Excel) for further analysis or reporting.

This statistical analysis tool enables users to interpret proposition data meaningfully, making it easier to track performance, budget allocations, and success metrics across different organisational dimensions.

6.2 Generating Reports

The **Reports on Propositions** feature is available only to **Administrators** (Figure 13).

The screenshot shows the 'Reports on Propositions' interface. At the top, there is a 'REPORTS' header. The main title is 'Reports on Propositions'. Below this, there are two main sections:

- Number of propositions:** This section provides statistics on the number of propositions categorized by status and department. It includes a checkbox to 'Classify by Call Type' (which is checked) and a dropdown menu for 'Call Type' with the following options: Expression of Interest (8), Proposal (10), Tender (20), and Framework Agreement (1). There are also dropdowns for 'Start month' (January) and 'End month' (December) for the year 2024. A green 'SUBMIT' button is located at the bottom of this section.
- New projects and participations in calls:** This section provides a list of new projects and participations in calls for a given time period. It includes dropdowns for 'Start month' (January) and 'End month' (December) for the year 2024. A green 'SUBMIT' button is located below these filters.

Figure 13: Reports page

It enables users to generate detailed reports on proposition data in Excel format, offering insights into various metrics and facilitating data analysis. This functionality includes two main types of reports:

- **Number of Propositions:** This report provides statistics on the number of propositions, categorized by status and department. Users can specify a date range by selecting a **Start Month** and **End Month** and can further classify propositions by **Call Type** if desired. If the classification option is left unchecked, all call types are included in the report. Once the parameters are set, clicking the **SUBMIT** button generates the report, which can then be downloaded in Excel format. This report allows for an overview of proposition activity, showing how propositions are distributed across departments and statuses within the selected period.
- **New Projects and Participations in Calls:** This report lists new projects and participations in calls within a defined time period. Users select a **Start Month** and **End Month** to set the reporting period, then click **SUBMIT** to generate the report. The resulting Excel file provides a record of new proposition entries and participation levels, helping to monitor engagement with new opportunities over time.

These reports, exported in Excel format, allow for flexibility in analyzing and sharing data. Users can manipulate the data further, create visualizations, or integrate it with other reporting tools as needed, enhancing organizational insights into proposition management.

7 Full Text Search

Full text search allows users to quickly find relevant information within the PROTASIS system by searching through text data across different records. This search functionality enables users to enter keywords and retrieve matching results that span various fields, making it easier to locate specific calls or organizations based on descriptive metadata.

To use the full text search, click on the magnifying glass icon located in the header of the PROTASIS interface. Once selected, a search bar will appear where you can enter a keyword or phrase. The search engine then scans through the metadata of **Calls** and **Organisations**, delivering results based on relevance. Please note that this search does not extend to the contents of attached files, such as Contracts or Grant Agreements.

In the results (see Figure 14), the system displays all entries that contain the given keyword within the metadata. Each result includes:

- **Title of the Call:** Displayed in bold, clickable, and linked to the detailed information page of that call.
- **Keyword Highlighting:** The keyword is highlighted in red within the title and description fields, making it easy to spot where the term appears in the context.

The use of different colours helps users quickly identify important elements: the **green text** for clickable titles, which direct the user to more details, and **red text** to highlight the specific search term within the descriptions. This color-coded approach enhances readability and ensures users can easily navigate through their search results.

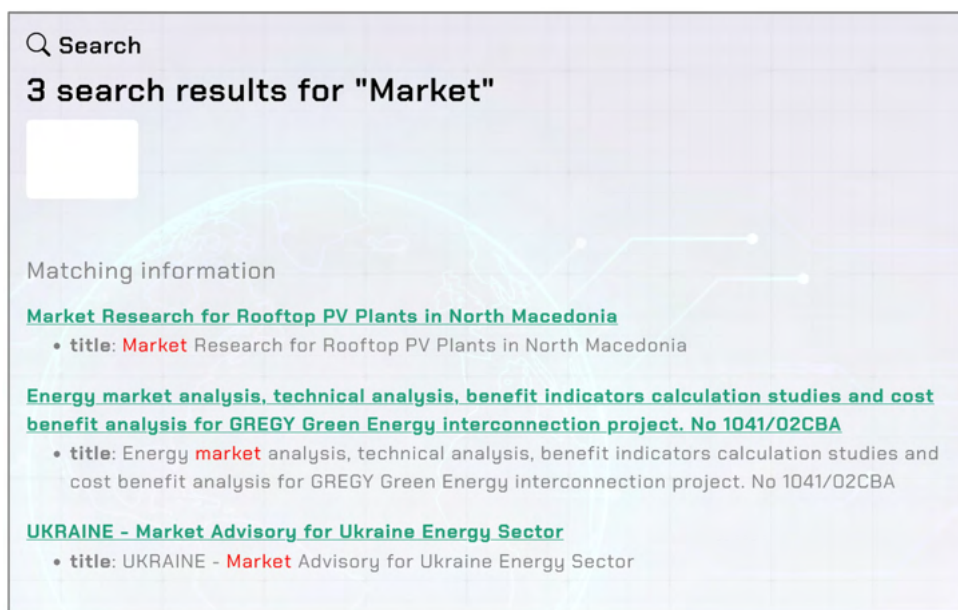


Figure 14: Example of full text search results