

SustainX

 **Pre-Assessment**
Tool for SMEs

D3.2. – Pre-assessment tool for SMEs I3



KEARNEY

IMP³ROVE



Funded by
the European Union

Deliverable information

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Lead partner:	DIZ		
Author(s):	Cristina Varvaruc (DIZ), Irina Robulet (DIZ), Adelina Marinescu (DIZ), Cristina Baghiu (DIZ), Georgiana Oprescu (DIZ), Lidia Alexa (TUIASI)		
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0.6	20.02.2026	Irina Robulet (DIZ), Adelina Marinescu (DIZ)	Structure and content reinement
1.0	27.02.2026	Cristina Baghiu (DIZ), Lidia Alexa (TUIASI)	Final revision

Additional information

Disclaimer

This document has been produced in the context of the SustainX Project. The SustainX project is part of the European Innovation Council and SMEs Executive Agency (EISMEA) and is as such funded by the European Commission. All information in this document is provided as is and no guarantee or warranty is given that the information is fit for any particular purpose. The user thereof uses the information at its sole risk and liability. For the avoidance of all doubts, the European Commission has no liability with respect to this document, which is merely representing the authors' view.

Executive Summary

Deliverable D3.2 presents the Pre-Assessment Tool for SMEs I3, developed within the SustainX project as a structured digital platform for standardized SME evaluation. The tool provides a transparent, auditable and scalable framework for assessing SME readiness across innovation, sustainability and investment dimensions.

The platform evaluates SMEs across seven core areas: Organizational Capacity, Innovation Readiness, Technology Readiness Level (TRL), Strategic & Market Positioning, Sustainability Initial Assessment, Financial & Investment Readiness, and Compliance & Documentation Preparedness. This multi-dimensional approach ensures a holistic understanding of SME maturity and development needs.

The operational model is based on clearly defined roles (Admin, Partner, SME), strict access control mechanisms and controlled validation workflows. Automated notifications, scoring logic and real-time dashboards support efficient monitoring and data-driven decision-making. All actions are recorded in an audit trail to ensure transparency and compliance.

Overall, the Pre-Assessment Tool strengthens governance, standardizes evaluation processes and supports SMEs in improving their readiness for innovation programmes, sustainability transition and access to finance within the SustainX framework.

The preassessment tool is currently under development and in pilot mode under the one stop shop DIZ & TUIASI concept. It is planned to be in full use by all partners after 15 of March 2026.

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Introduction



Introduction

The **Pre-Assessment Tool for SMEs I3** is developed within the SustainX project to provide a structured, digital and transparent mechanism for supporting the SMEs to assess their capacity to participate in innovation and investment support programmes.

The tool addresses the need for:

- A standardized methodology for SME pre-assessment
- Clear evaluation criteria and scoring logic
- Transparent validation processes
- Secure document management
- Real-time monitoring of progress and results

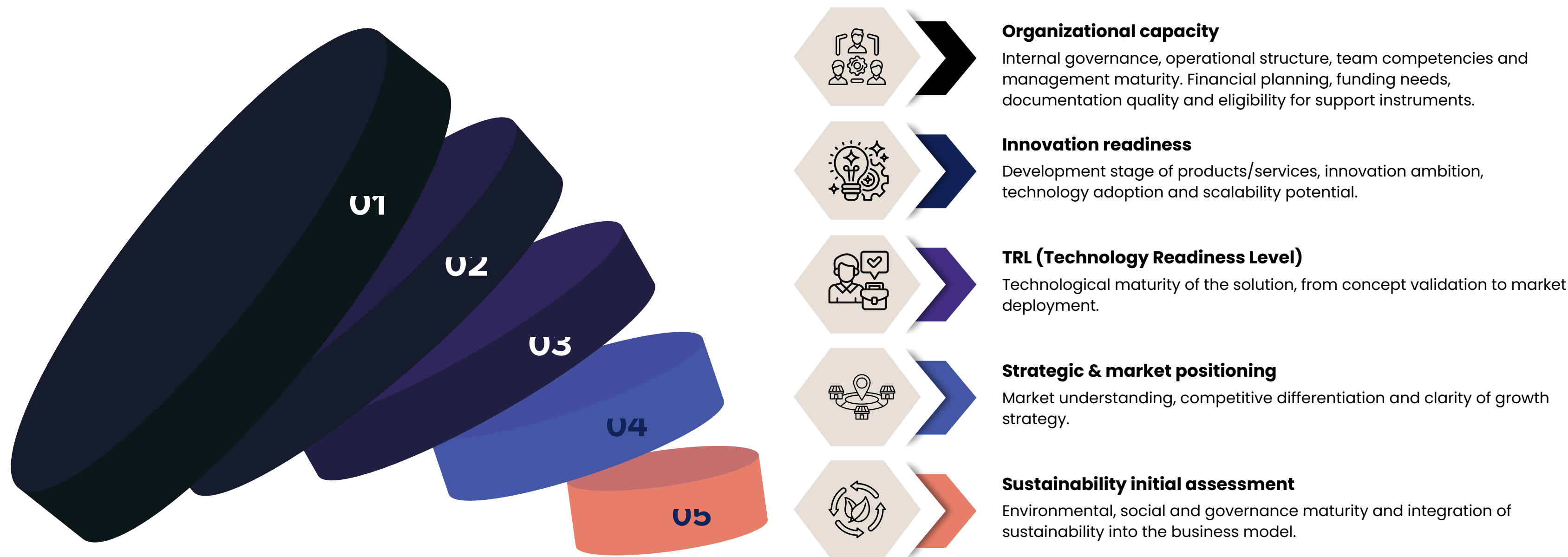
It provides a standardized, transparent and auditable framework for pre-assessing SMEs across multiple projects and regions.

Additional information

The information provided through the pre-assessment tool is collected to support the programme team in understanding the needs, capacities, and development priorities of the organization. The results displayed after the SMEs provide the requested information represent an initial aggregation of the information submitted and are intended for informative and guidance purposes only. The outcomes of the assessment do not constitute a final evaluation, certification, or eligibility decision for funding or investment. All information collected will be used by the programme team solely to design and deliver appropriate support, services, and guidance tailored to the needs of the organization. All data is treated confidentially and processed in accordance with applicable data protection regulations.

Assessment framework overview

The tool evaluates SMEs across key dimensions related to innovation and development readiness, including:



This structured framework ensures a holistic evaluation of SME maturity, identifying strengths, gaps and priority areas for development and targeted support.

Strategic objectives & challenges addressed

Strategic objective

- ✓ Standardized SME pre-assessment across innovation projects
- ✓ Transparent and auditable decision-making
- ✓ Digital transformation of assessment processes
- ✓ Ecosystem-level monitoring and comparability

It acts as a structured bridge between SMEs and pre-assessment instruments.

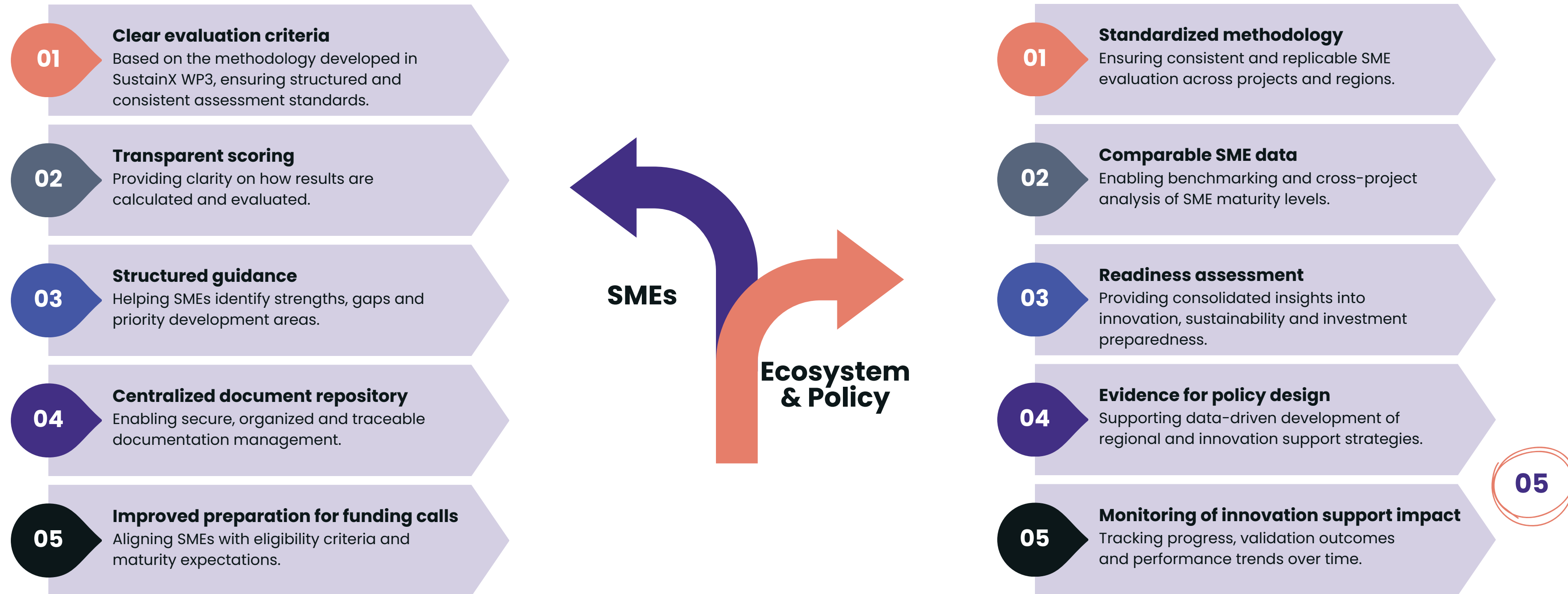


Challenges addressed

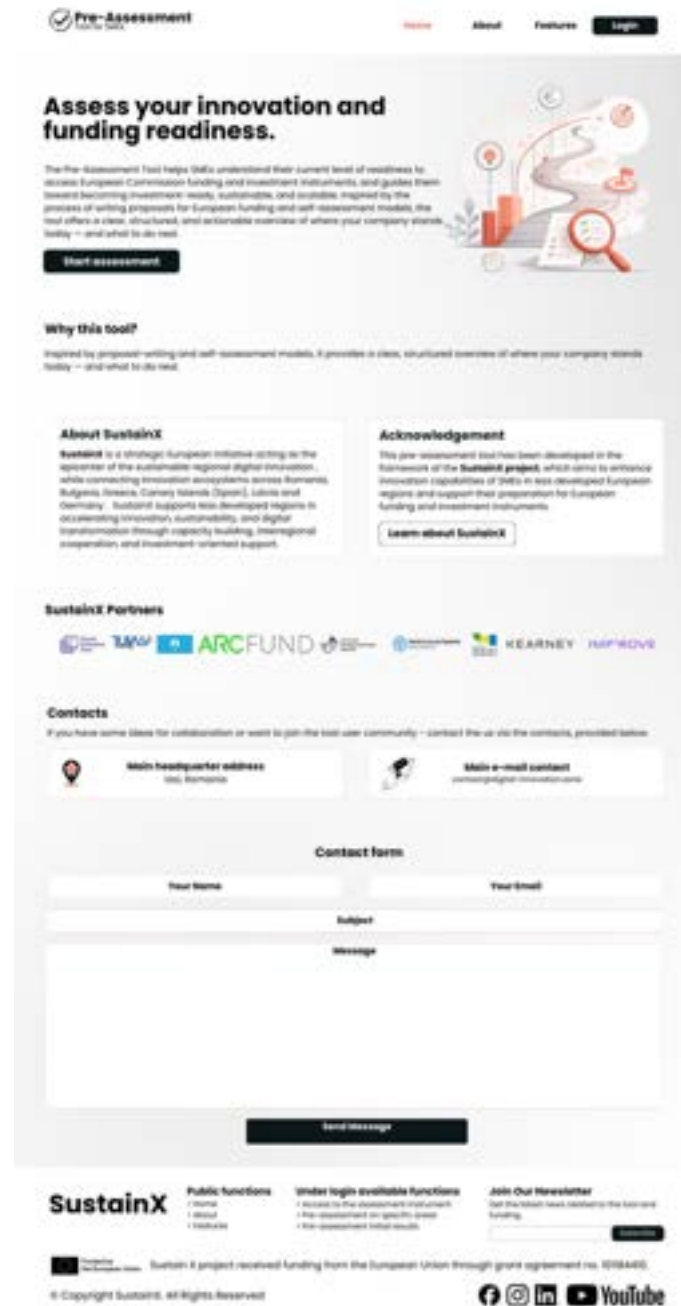
- Assessments were manual and inconsistent ✓
- Documents were scattered and difficult to track ✓
- Validation processes lacked traceability ✓
- Scoring criteria were not standardized ✓
- Communication between actors was fragmented ✓

The platform solves these issues through automation and structure.

Added value for SMEs, Ecosystem & Policy



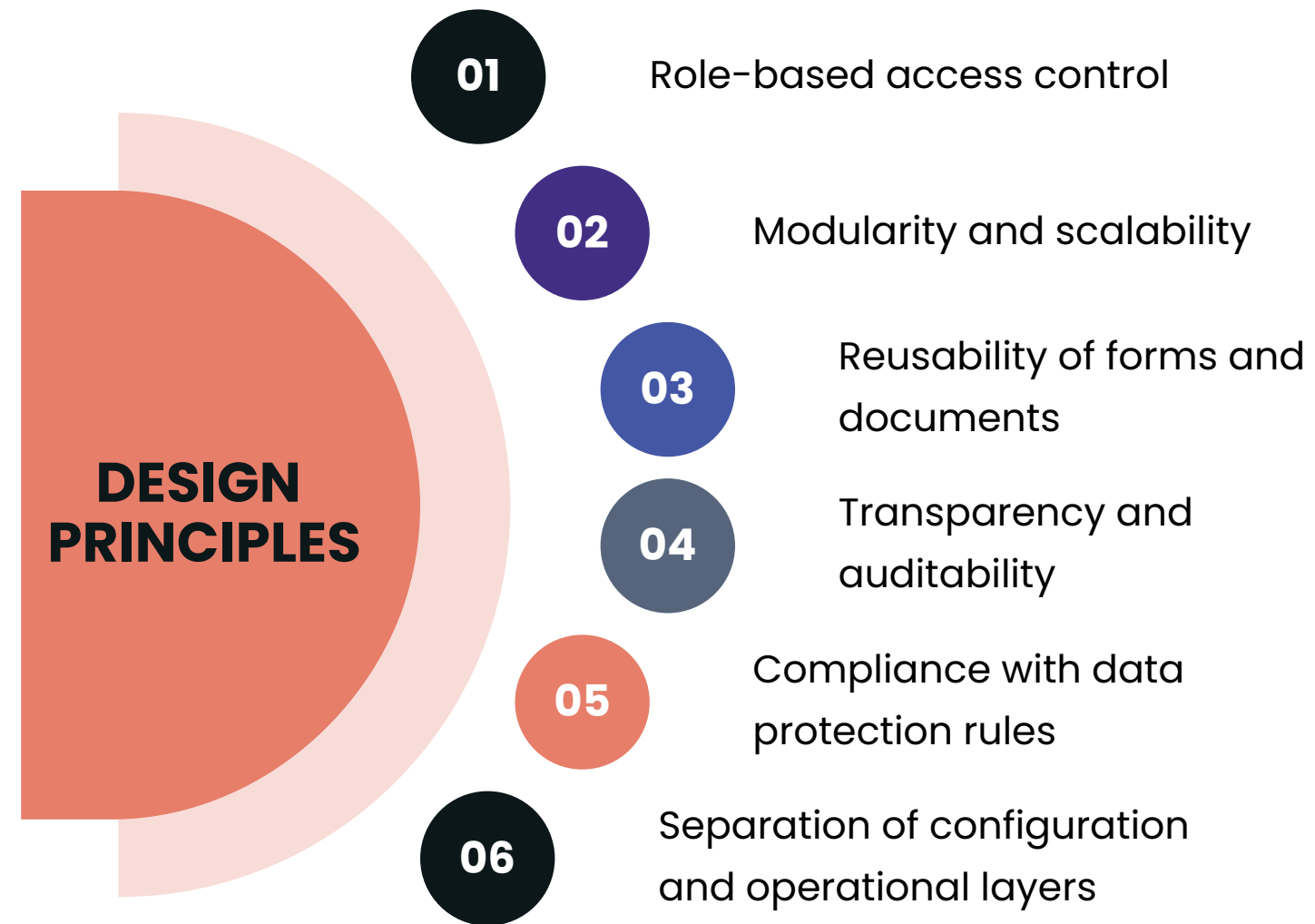
Pre-assessment landing page initial design



The functional logic and operational model

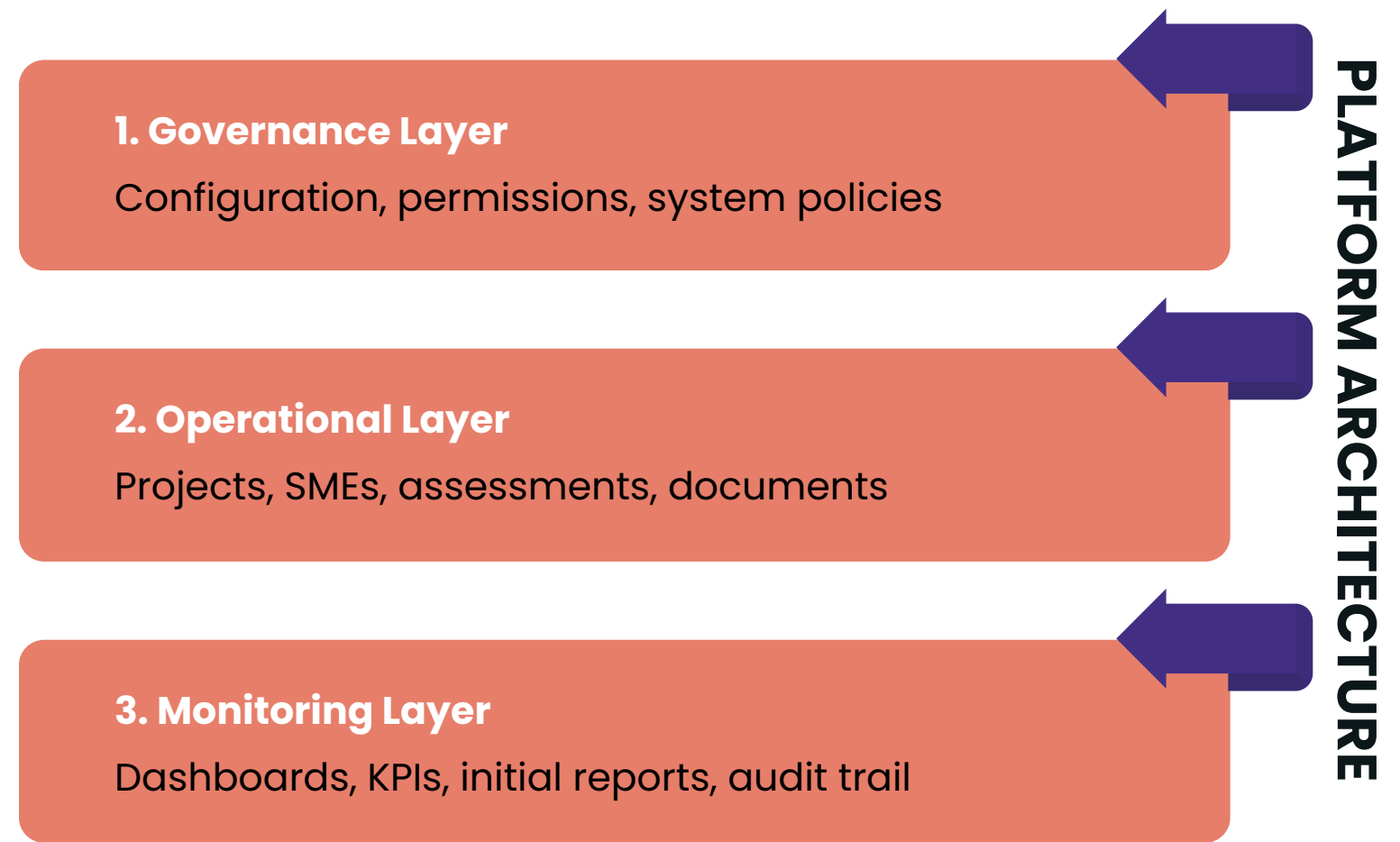


Design principles & platform architecture



This ensures long-term sustainability and adaptability.

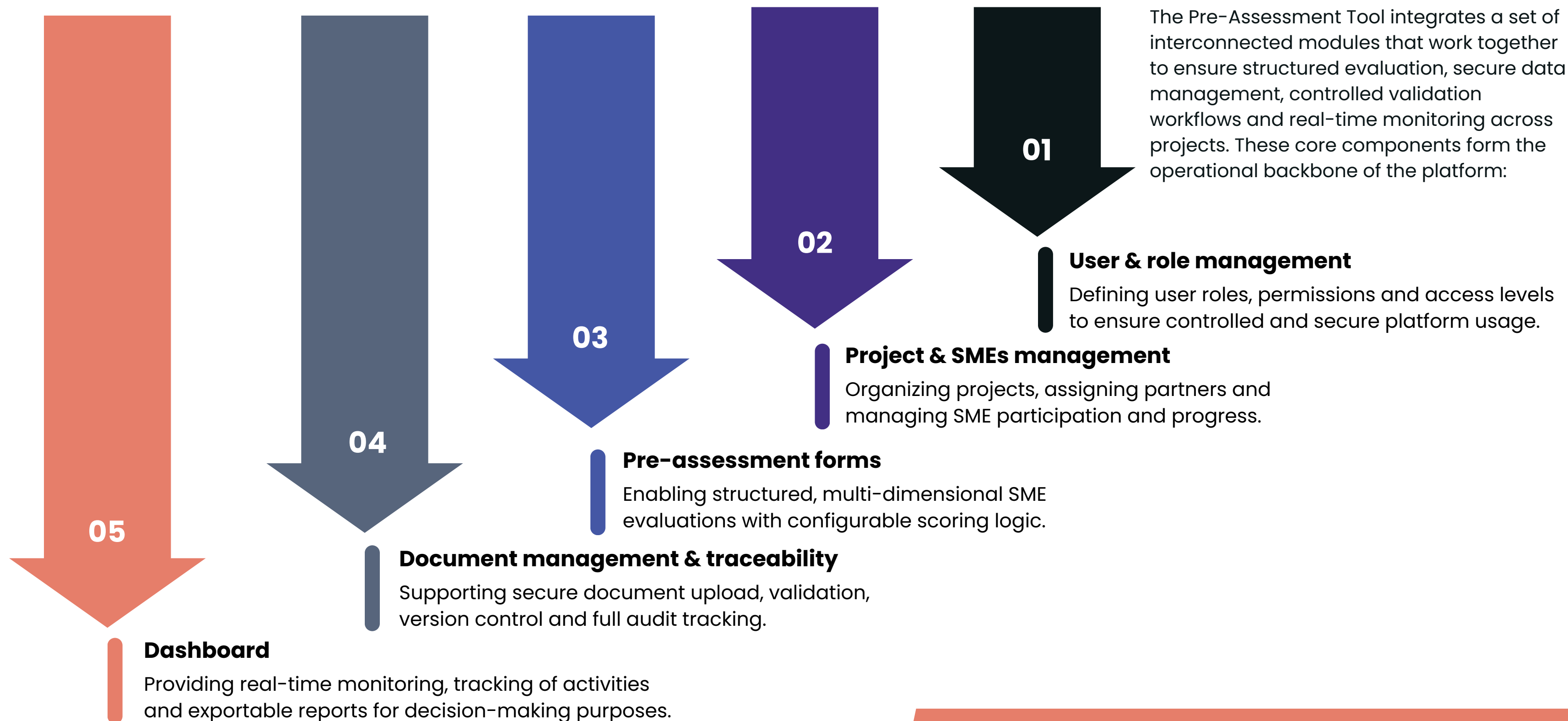
The platform operates on three levels:



08

These layers interact but remain clearly structured.

Core Modules



Organizational capacity assessment

The tool evaluates the internal strength and operational maturity of the SME, focusing on:

Governance Structure

Clarity of roles and responsibilities, decision-making processes and leadership structure.

Internal Processes

Existence of documented procedures, workflow organization, quality control mechanisms and operational efficiency.

Team Competencies

Skills, expertise, experience and capability alignment with business objectives.

Operational Maturity

Level of formalization, management systems in place and ability to scale operations sustainably.

Purpose

This dimension identifies whether the SME has the internal capacity to successfully implement innovation and growth initiatives.

10

Disclaimer

The results presented above are indicative and are based on the initial findings generated through the Pre-Assessment Tool. The achievement of these outcomes depends on the baseline assessment results and the subsequent tailored support provided by the implementation team. Final progress and impact will be determined by the SME's engagement, commitment to recommended actions, and the structured guidance delivered throughout the implementation process.

Innovation Readiness Assessment

The tool assesses the SME's ability to generate, develop and scale innovative solutions by analysing:

Innovation Ambition

Strategic commitment to innovation and clarity of innovation objectives.

Development Stage

Maturity of products/services (idea, prototype, validated solution, market-ready).

Technology Adoption

Use of digital tools, emerging technologies and R&D integration.

Scalability Potential

Capacity to expand products/services to new markets or customer segments.

Purpose

This dimension evaluates how prepared the SME is to move from idea to implementation and sustainable market growth.

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TRL (Technology Readiness Level) assessment

The tool pre-assesses the technological maturity of the SME's innovation using the TRL framework, focusing on:

- Structured approach to ease the process of the TRL level pre-assessment.
- Identification of the TRL level reached.
- Identification of gaps that might occur for reaching each TRL level.
- Initial pre-assessment results available as soon as the form is filled in.

Purpose

The TRL assessment ensures a clear and objective evaluation of innovation maturity, identifying development gaps and supporting alignment with funding and commercialization requirements.

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Strategic & market positioning assessment

The tool reviews how clearly and effectively the SME positions itself in the market, focusing on:

Market Understanding

Knowledge of target customers, demand trends and industry dynamics.

Competitive Positioning

Differentiation strategy, value proposition clarity and competitive advantage.

Growth Strategy

Defined expansion partnerships.

Purpose

This dimension determines whether the SME has a coherent strategic direction aligned with market realities and growth objectives.

Disclaimer

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Sustainability initial assessment

The tool evaluates the SME's sustainability maturity across:

Environmental, Social and Economical pre-assessment

Resource efficiency, emissions awareness, waste management and environmental impact mitigation.
Integration of sustainability principles into products, services and value creation.
Presence of sustainability policies, targets and monitoring indicators.
Workforce practices, inclusion, stakeholder engagement and community impact.

Sustainability Awareness

Assessment of sustainability standards, regulatory requirements and reporting preparedness.

Purpose

This dimension supports SMEs in aligning with sustainability frameworks and transitioning toward resilient, future-oriented business models.

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Financial & investment readiness

The tool analyses the SME's preparedness to attract and manage funding by assessing:

- Financial Documentation
- Availability and quality of financial statements and supporting documents.
- Funding Needs Identification
- Clarity of financing requirements and capital structure.
- Eligibility for financial opportunities calls
- Alignment with funding criteria and compliance requirements.

Purpose

This dimension determines whether the SME is financially structured and prepared to access innovation funding or investment instruments.

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Compliance & documentation preparedness

The tool verifies the SME's administrative and legal readiness by reviewing:

- Legal Documentation
- Registration certificates and/or statutory documents.
- Financial Documentation
- Document accuracy and alignment with funding calls requirements.
- Ability to maintain updated documentation across multiple projects.

Purpose

This dimension ensures that SMEs meet minimum regulatory and administrative standards required for participation in innovation and funding programmes.

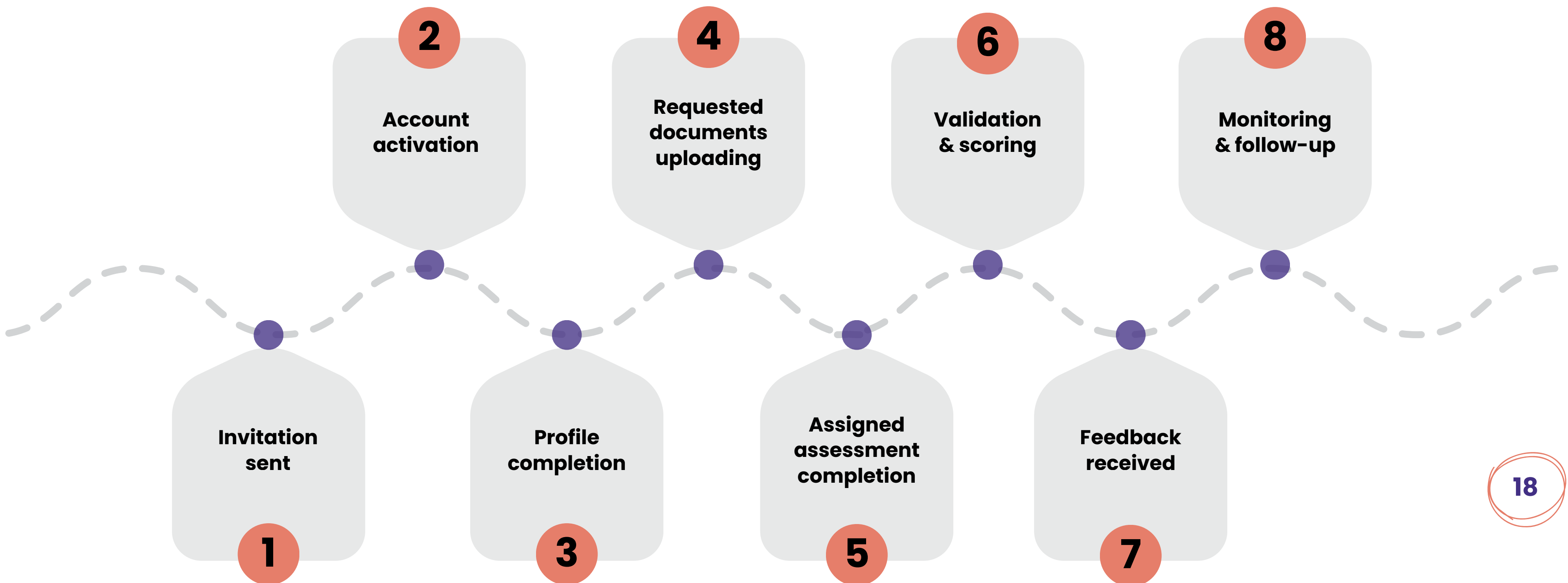
Disclaimer

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The user and evaluation workflow



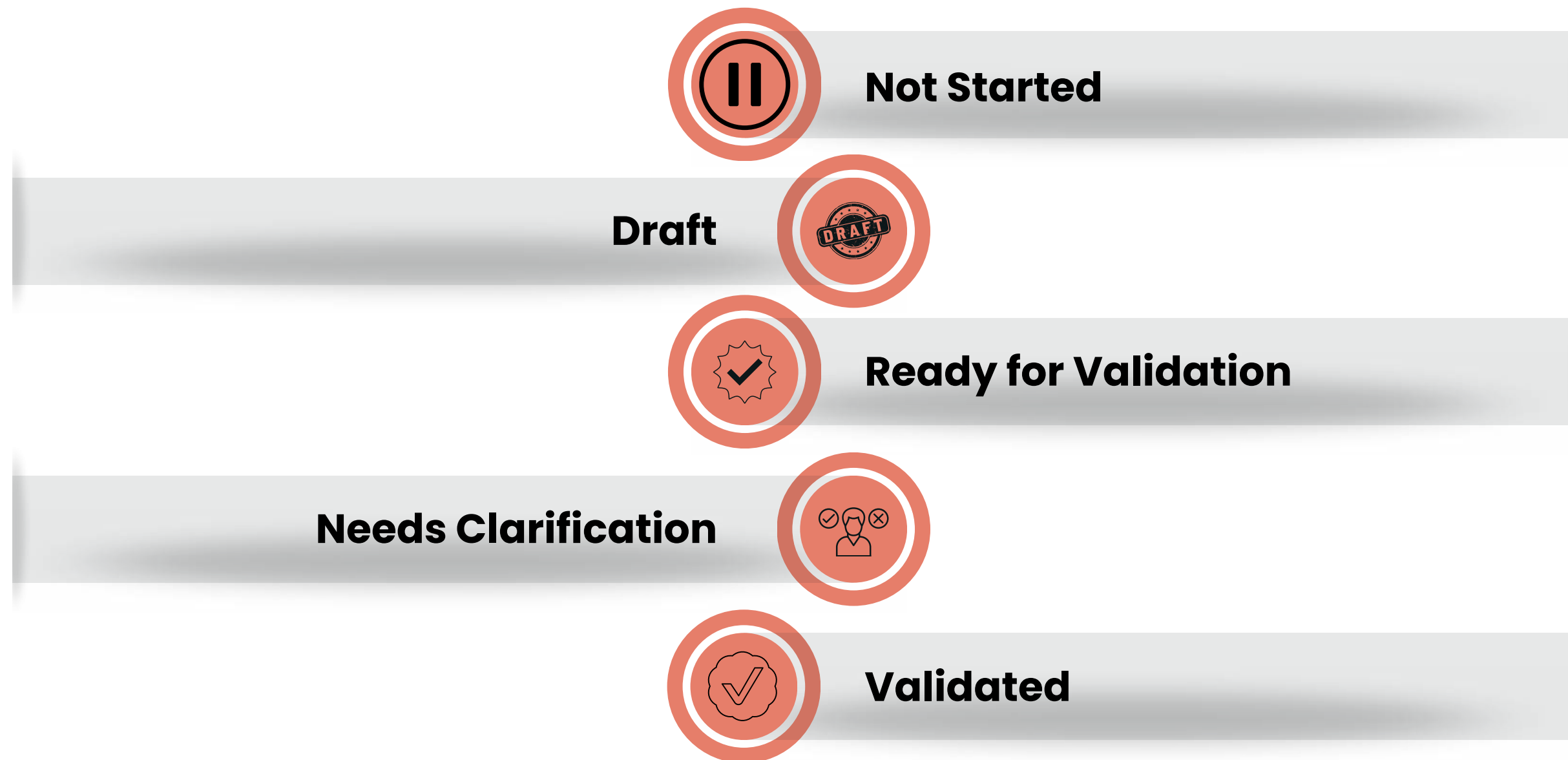
Beneficiary lifecycle



Each step is logged and traceable.

Assessment status flow

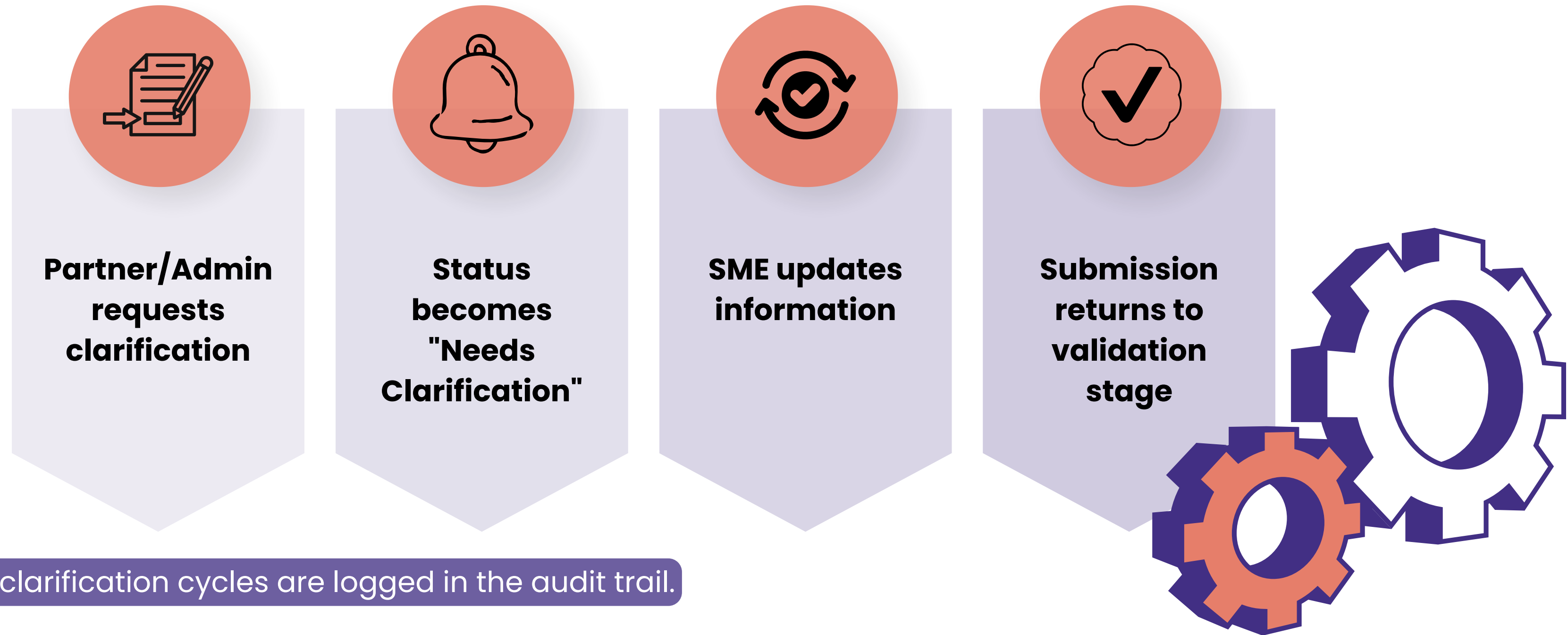
Each assessment moves through a controlled status cycle:



Status transitions are controlled by role permissions. No actor can bypass the validation process.

Clarification mechanism

If information is incomplete:



All clarification cycles are logged in the audit trail.

Document management logic & status lifecycle

The document module ensures

- Controlled upload formats
- Version history tracking
- Expiry validation
- Prevention of reuse of invalid documents
- Secure storage integration
- Full traceability
upload, approval and rejection



Documents follow a defined cycle

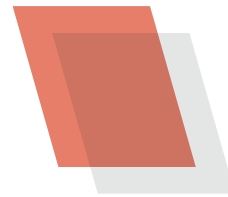
- Pending Validation
- Approved
- Rejected
- Needs Clarification
- Expired
- The cycle restarts if required

Documents are linked to activities and assessments.

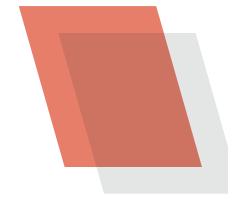
Expired or rejected documents cannot be reused.

Document modules

The document module ensures:



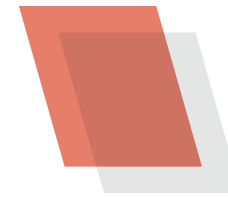
Controlled upload formats



Prevention of reuse of invalid documents



Version history tracking

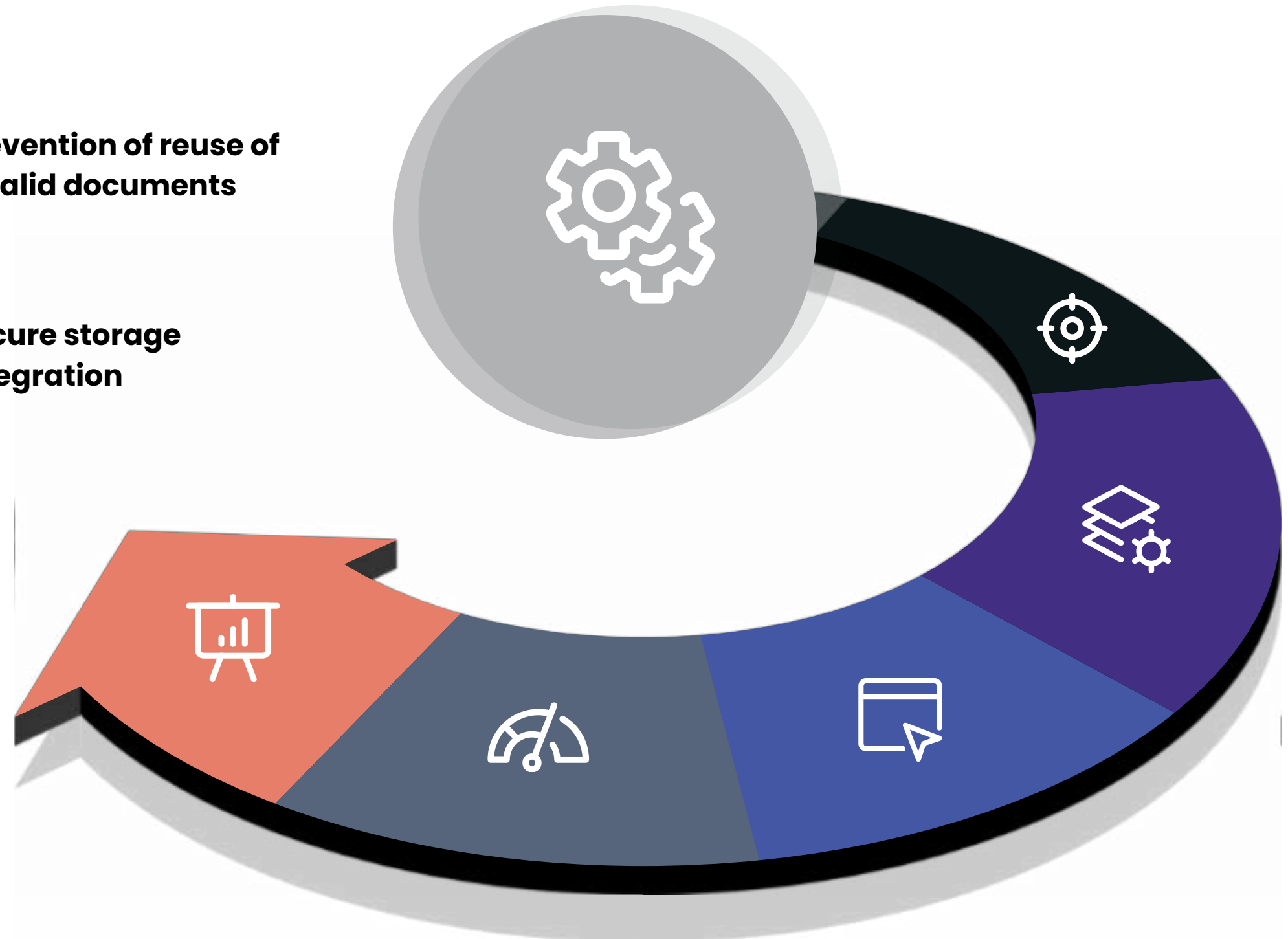


Secure storage integration



Expiry validation

Documents are linked to the pre-assessments process.



Types of questions supported by the pre-assessment tool

The tool supports a variety of structured response formats to ensure comprehensive and flexible data collection while maintaining methodological consistency:

Numerical scales – allowing quantitative evaluation and scoring.

Single choice – enabling clear selection among predefined options.

Multiple choice – capturing complex or multi-faceted responses.

Open text responses – providing space for qualitative explanations and contextual information.

Mandatory/optional questions – ensuring essential data is collected while allowing flexibility where appropriate.

Conditional logic (where applicable) – adapting questions dynamically based on previous answers.

Supporting document uploads – enabling evidence-based validation of responses.

This structured flexibility ensures comprehensive assessment while preserving clarity, comparability and methodological rigor.

Scoring Logic

The scoring mechanism is designed to ensure objective and consistent evaluation across all assessment dimensions and may include:

Automatic calculation based on predefined rules – applying standardized scoring logic to ensure consistency.

Weighted domains – assigning differentiated importance to specific assessment areas.

Aggregated readiness score – generating an overall maturity indicator based on combined results.

Eligibility thresholds – defining minimum criteria for validation or programme participation.

Category-based evaluation – classifying SMEs into maturity levels or readiness categories.

All scores are stored per assessment instance and cannot be modified without a recorded audit trace, ensuring transparency and accountability.

Automated System Functions

The platform automatically:

Sends invitations and reminders – ensuring timely engagement and follow-up.

Updates status transitions – applying predefined workflow logic without manual intervention.

Generates notifications – informing relevant actors about submissions, validations or required actions.

Logs all actions – recording every activity in the audit trail for traceability.

Applies scoring logic – calculating results consistently based on configured rules.

Updates dashboards in real time – reflecting progress and performance indicators instantly.

Automation reduces human error, increases operational efficiency and strengthens transparency throughout the evaluation process.

Project management structure

Each project within the platform is structured as a dedicated evaluation environment and includes:

Defined partners – clearly assigned stakeholders responsible for validation and coordination.

Assigned SMEs – beneficiaries grouped under the project for structured monitoring and assessment.

Activated modules (e.g. TRL, sustainability, etc.) – selected assessment components tailored to the initiative's objectives.

Configured deadlines – defined submission and validation timelines to ensure efficient workflow management.

Associated forms – specific assessment templates aligned with the project scope.

Linked document requirements – required supporting documentation connected to activities and evaluations.

Projects function as independent and configurable evaluation environments within the platform, ensuring clarity, organization and controlled implementation.

Operational Sustainability

The tool supports long-term sustainability through:

Centralized configuration – enabling consistent system management and structured governance across projects.

Modular upgrades – allowing new features and assessment components to be integrated without disrupting existing structures.

Audit-based governance – ensuring transparency, accountability and traceability of all actions and decisions.

Standardized workflows – applying consistent validation and assessment processes across initiatives.

Reusable evaluation models – permitting adaptation and replication of assessment frameworks for future projects.

By digitizing and structuring these processes, the platform significantly reduces dependency on manual administrative workflows and enhances operational efficiency.

Risk mitigation

The platform reduces operational and governance risks such as:

Unvalidated submissions – ensuring that all assessments follow a controlled validation workflow.

Data loss – centralizing information within a secure and structured digital environment.

Unauthorized access – enforcing strict role-based access control (ACL).

Untraceable decisions – recording all actions and validation steps in an immutable audit trail.

Inconsistent evaluation criteria – applying standardized assessment methodologies across projects.

Manual administrative errors – automating status updates, scoring logic and notification processes.

By integrating these safeguards, the platform introduces structure, accountability and strong governance mechanisms into the SME evaluation process.

Governance and access structure



Role Structure

The platform operates under a clearly defined governance structure, where each actor has specific responsibilities to ensure transparency, accountability and efficient workflow management.

Super Admin (DIZ) – holds full configuration and validation authority, including project setup, module management, scoring oversight and system-level governance controls.

Admin (Partner) – manages assigned SMEs, reviews submissions, requests clarifications and performs validation activities within their allocated scope.

Beneficiaries (SMEs) – complete assessment forms, upload required documentation and respond to clarification requests within the platform.

System (Automated Layer) – handles notifications, status transitions, scoring logic application and full audit logging of all actions.

This structured role distribution ensures controlled access, clear responsibilities and a transparent evaluation process across all projects.

Access Control (ACL)

Access to data within the Pre-Assessment Tool is governed by strict role-based access control (ACL), ensuring confidentiality, data integrity and clear accountability across all projects.

SMEs – have access only to their own data, including assessments, documents, status updates and feedback.

Partners – have access only to the SMEs assigned to them and the related project data within their scope of responsibility.

Super Admin (DIZ) – has full visibility across all projects, beneficiaries, assessments and system configurations.

System (Automated Control) – enforces permissions automatically based on the defined governance structure, preventing unauthorized access or actions.

This access model guarantees secure data segregation, transparency and compliance with governance and data protection requirements.

Governance Controls

To ensure flexibility and adaptability across different initiatives, the platform provides a set of configurable governance controls that allow structured management and operational customization at project level. These controls enable efficient coordination, clear accountability and alignment with project-specific objectives.

Configurable project setup – allowing the creation and structuring of projects according to the specific initiative, including beneficiary grouping and activity definition.

Module activation/deactivation – enabling the selective use of assessment components depending on the scope and needs of each project.

Configurable notifications – allowing tailored communication flows, reminders and validation alerts based on project requirements.

Deadline management – supporting the definition and monitoring of submission timelines and validation periods.

Role-based validation authority – ensuring that validation rights are clearly assigned according to governance structure and access control rules.

Together, these governance mechanisms ensure that the Pre-Assessment Tool remains adaptable while maintaining a controlled, transparent and accountable evaluation environment.

Scalability & Replicability

The Pre-Assessment Tool is built with scalability and long-term usability in mind, ensuring that it can evolve alongside future initiatives and expanding SME ecosystems.

Support multiple projects simultaneously – allowing parallel implementation of different programmes within the same platform.

Allow addition of new assessment types – enabling the integration of new evaluation dimensions or thematic modules as needs evolve.

Enable activation/deactivation of modules – providing flexibility to tailor functionality according to project objectives.

Scale to larger SME cohorts – supporting increased numbers of beneficiaries without compromising structure or performance.

Be replicated in other regions – facilitating transferability and adaptation to different regional innovation ecosystems.

Overall, the platform is modular, adaptable and designed for sustainable expansion.

User Manual



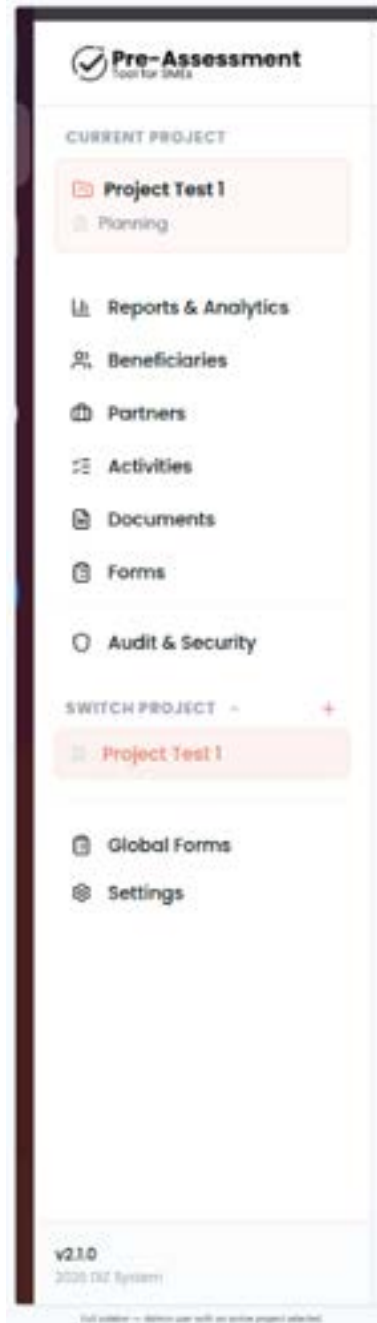
Disclaimer

The Pre-Assessment Tool for SMEs was designed not only for the current implementation phase of SustainX project, but also to support future activities and initiatives. Its modular and scalable structure allows SMEs/beneficiaries to be grouped into specific categories or projects that belong to the same programme or support initiative, ensuring efficient coordination and implementation of project activities in line with the platform's operational logic.

Additionally, the tool allows Admins to personalize and configure the assessment process according to the specific needs of each initiative. While the platform includes a comprehensive set of assessment dimensions and functionalities, Admins can activate, adapt or combine selected modules, forms and evaluation components based on the objectives of the project. This flexibility ensures that SMEs are assessed in a targeted and relevant manner, while still benefiting from the full potential and structured framework of the platform.

The tool is still under development at the moment of deliverable submission and the it might suffer modification on structure and content based on the testing phase.

Menu navigation



SECTION 1

Sidebar Navigation

The left-hand panel that gives access to all features. Always visible on desktop; tap ☰ on mobile to open it.

1 Overview




After logging in, the sidebar is divided into four areas from top to bottom:

- **Logo** — application branding.
- **Current Project card** — quick-access info about the active project.
- **Navigation links** — pages for the selected project.
- **Switch Project / Admin tools** — project switcher and admin-only links at the bottom.

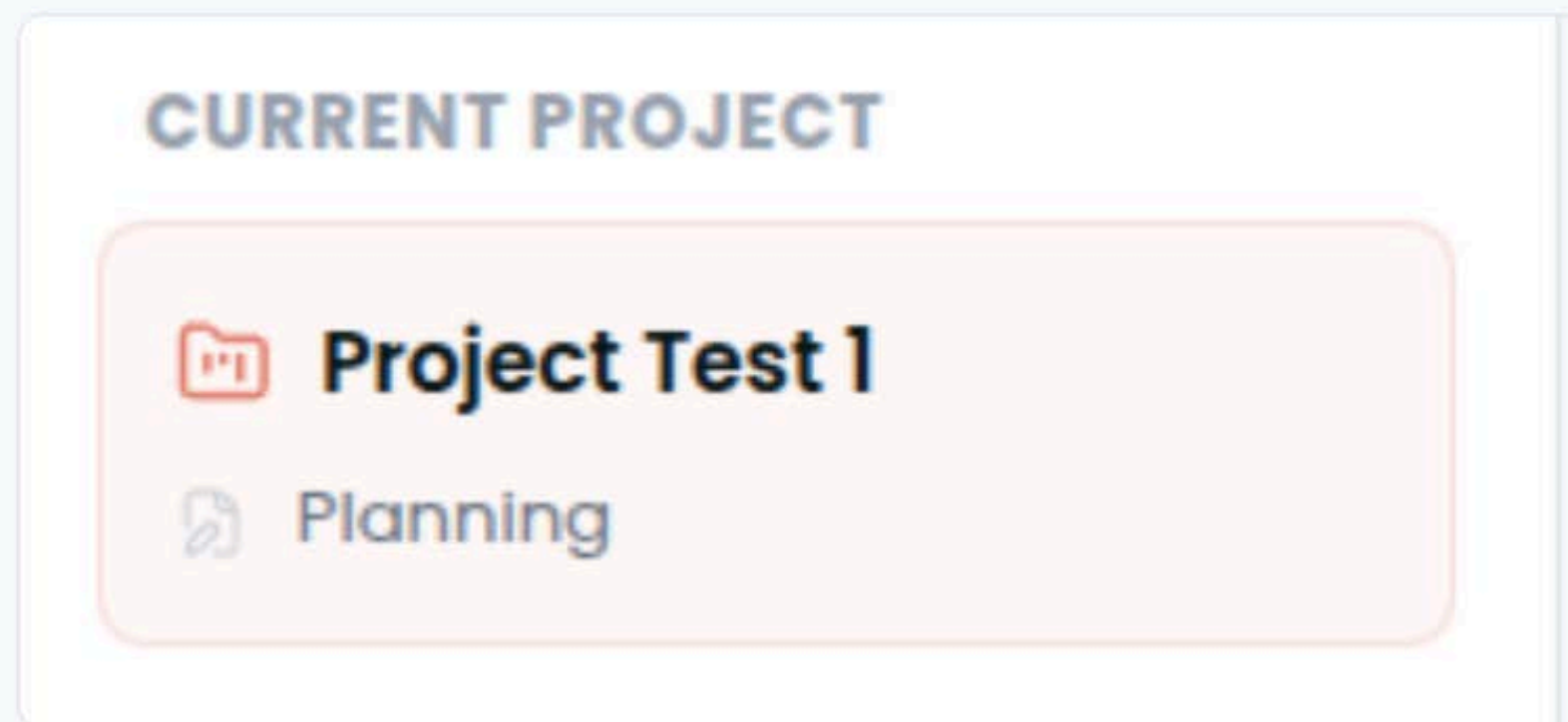
Menu navigation

2 Current Project panel

When a project is active, a highlighted card shows the project name and its current status:

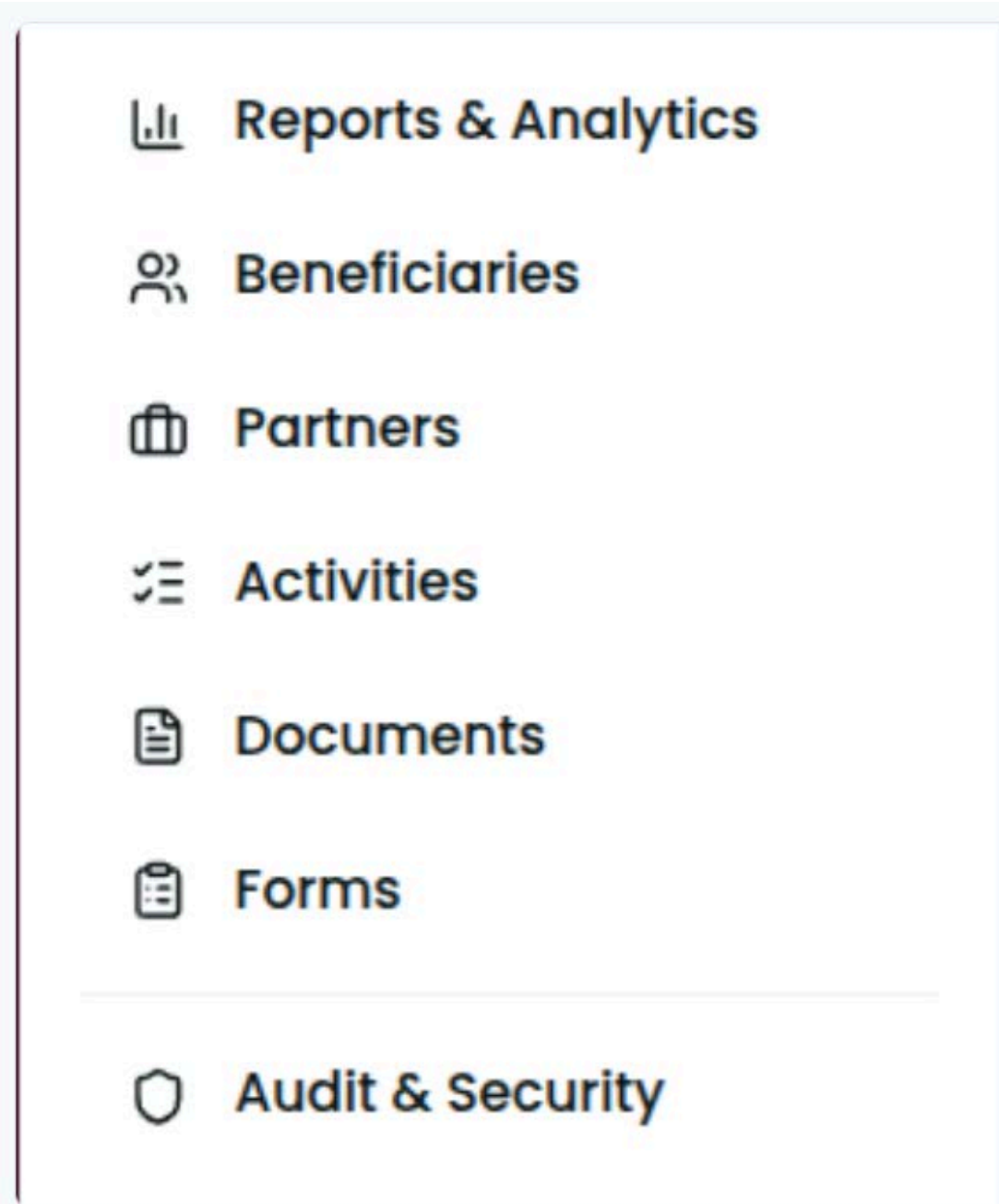
-  **Active** — project is running.
-  **Completed / Archived** — project has ended or been archived.
-  *Other* — planning or unknown state.

 Click anywhere on the Current Project card to navigate directly to that project's home page.



Current Project card showing name and Active status indicator.

Menu navigation



Navigation links for an Admin with a project selected.

3 Navigation items

Below the Current Project panel are the page links. The active page is highlighted in **Terra Cotta**. Some links are role-restricted.

LINK	VISIBLE TO	WHAT IT OPENS
Reports & Analytics	ADMIN PARTNER BENEFICIARY	Project statistics and KPI overview.
Beneficiaries	ADMIN PARTNER	Manage beneficiary organizations for this project.
Partners	ADMIN	Manage partner organizations assigned to this project.
Activities	ADMIN PARTNER BENEFICIARY	View and manage workshops, trainings, evaluations, etc.
Documents	ADMIN PARTNER BENEFICIARY	Upload and view project documents.
Forms	ADMIN PARTNER BENEFICIARY	View and fill assessment forms linked to the project.

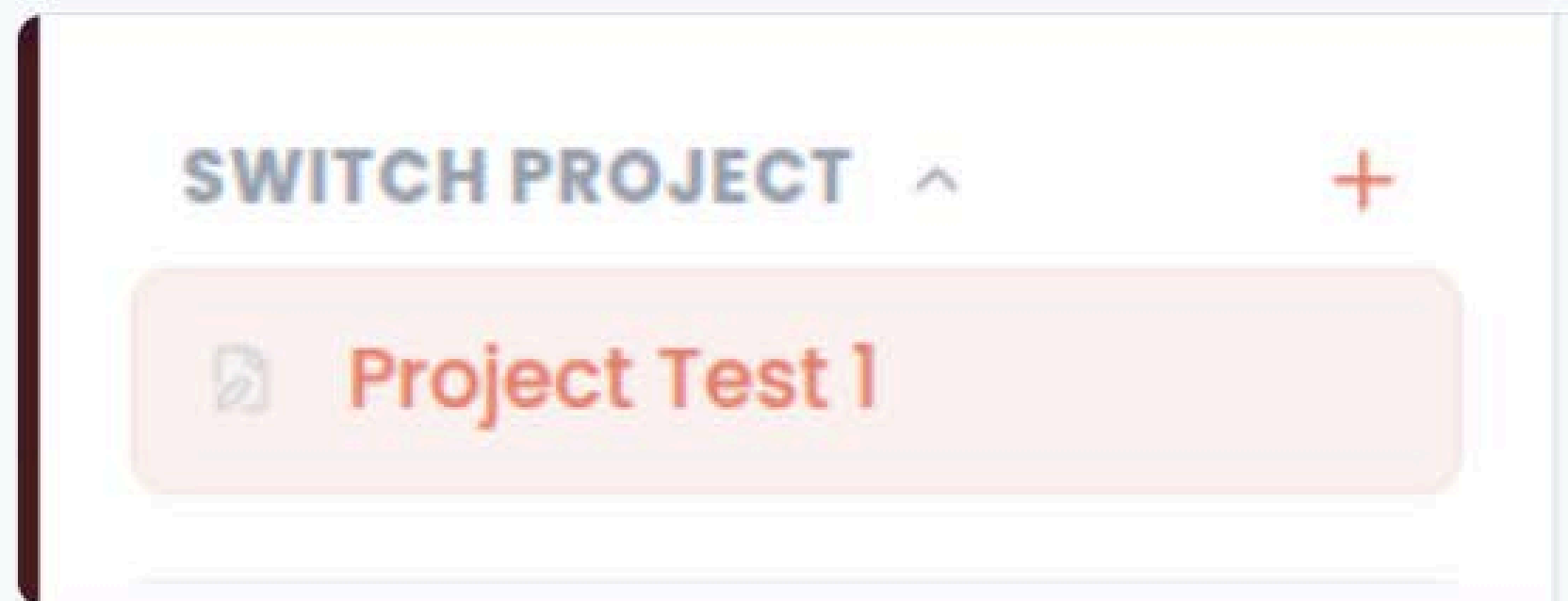
i Beneficiaries, Partners, Activities, Documents, and Forms links only appear once a project is selected. Without an active project, only **Reports & Analytics** is shown.

Menu navigation

4 Switch Project

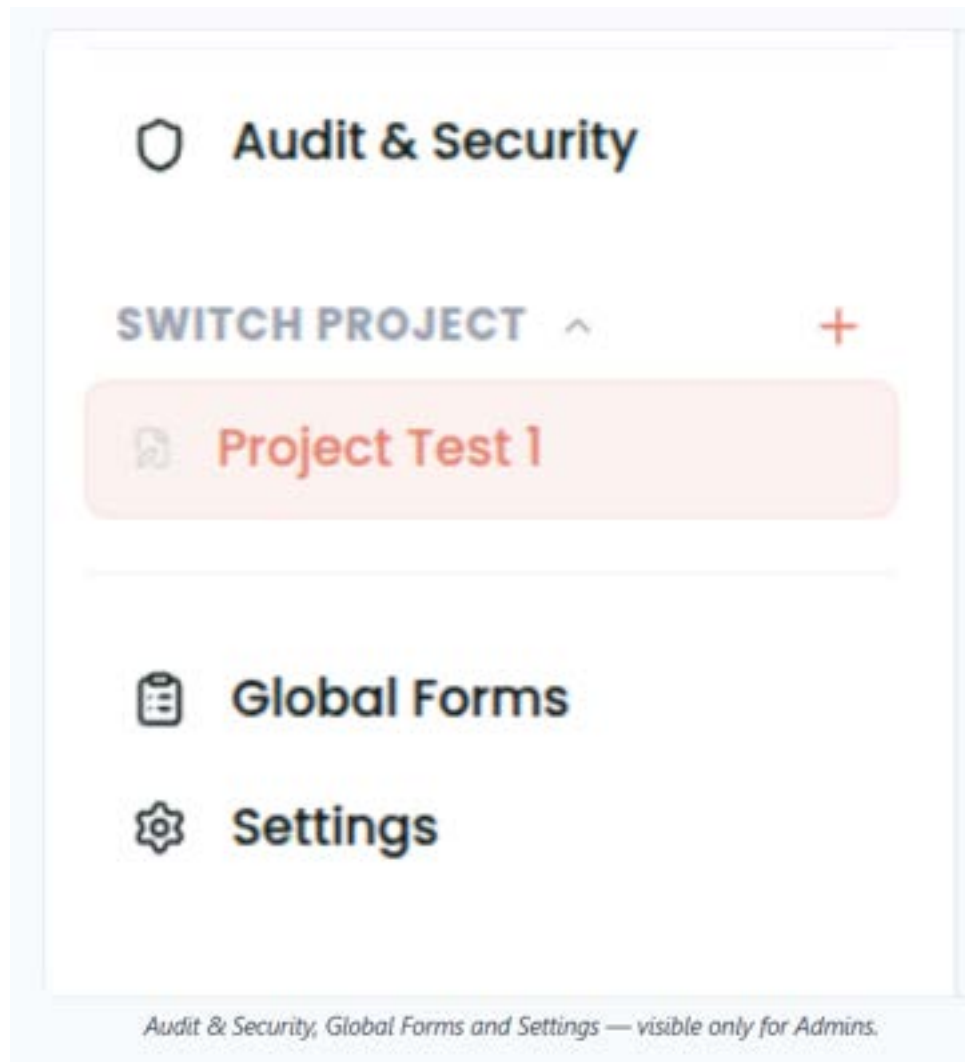
Below the navigation links is the **Switch Project** section — an expandable list of all projects you have access to.

- Click the **Switch Project** label to expand or collapse the list.
- The currently selected project has a **coloured ring** highlight.
- Click any project name to make it active — all navigation links update to point to that project.
- Admins see a **+** icon beside the section title to create a new project (see *Create New Project* in the sidebar).



Switch Project panel expanded — active project highlighted, + button visible for Admins.


Menu navigation



5 Admin-only items ADMIN

At the bottom of the navigation, Admins see three additional items separated by a divider:

ITEM	WHAT IT OPENS
Audit & Security	A full audit log of every action taken in the system — who did what and when. Used for compliance and security review. This link appears <i>inside the project context</i> (below a divider in the navigation links area).
Global Forms	Form templates that can be reused across all projects.
Settings	System-wide configuration: email templates, activity statuses, and more.

 These links are hidden for Partner and Beneficiary roles. Only system Admins have access.

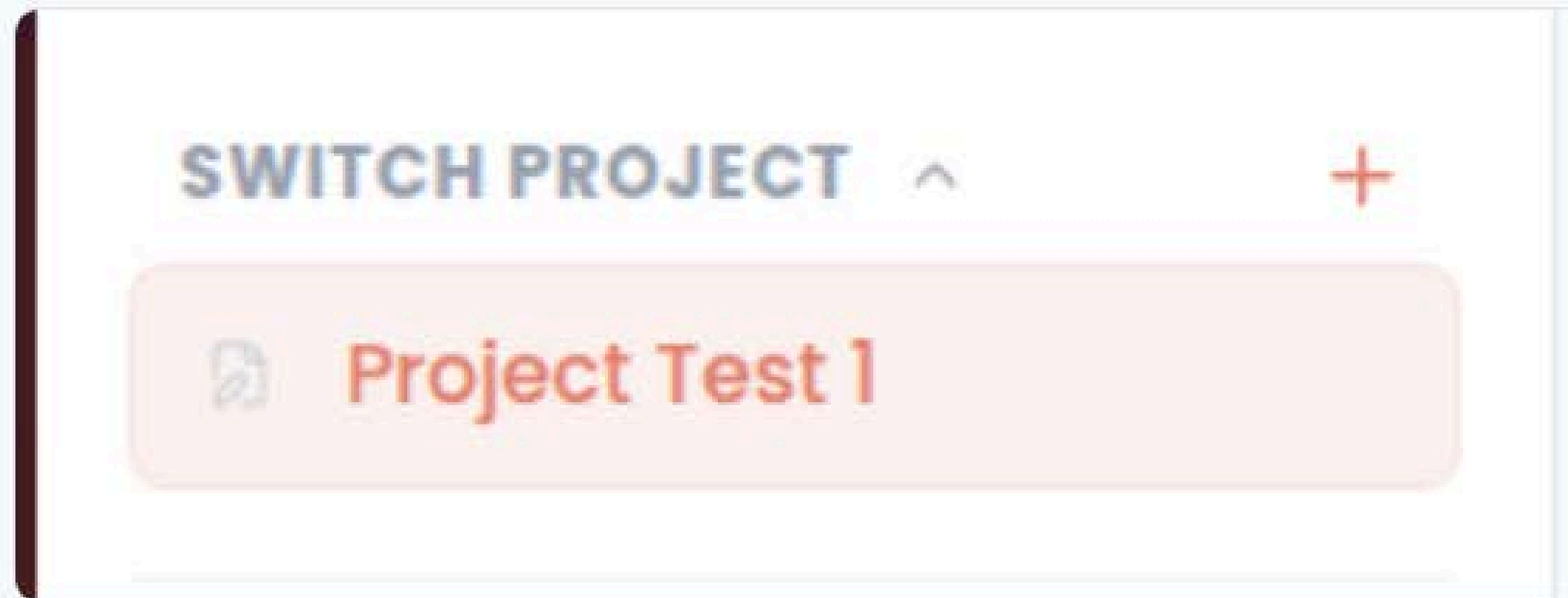
How to create a new project

Only users with the **ADMIN** role can create projects.

1 How to open the form

There are two entry points:

- **Sidebar + button** — click the **+** icon next to *Switch Project* in the sidebar.
- **Empty state card** — if no projects exist yet, the sidebar shows a **Create Project** button inside a dashed card.



The + button in Switch Project section and the empty-state Create Project button.

How to create a new project

2 Project Information

The first card collects the project's core details.

FIELD	REQUIRED	DESCRIPTION
Name	Yes	Full project name, e.g. "Community Health Initiative".
Project Type	Yes	One of: <i>Innovation, Research, Development, EU Funded, National.</i>
Description	Yes	Brief summary of objectives and scope.

Project Information
Basic details about the project

Name * Select type

Description *

Project Information card — Name, Type, and Description fields.

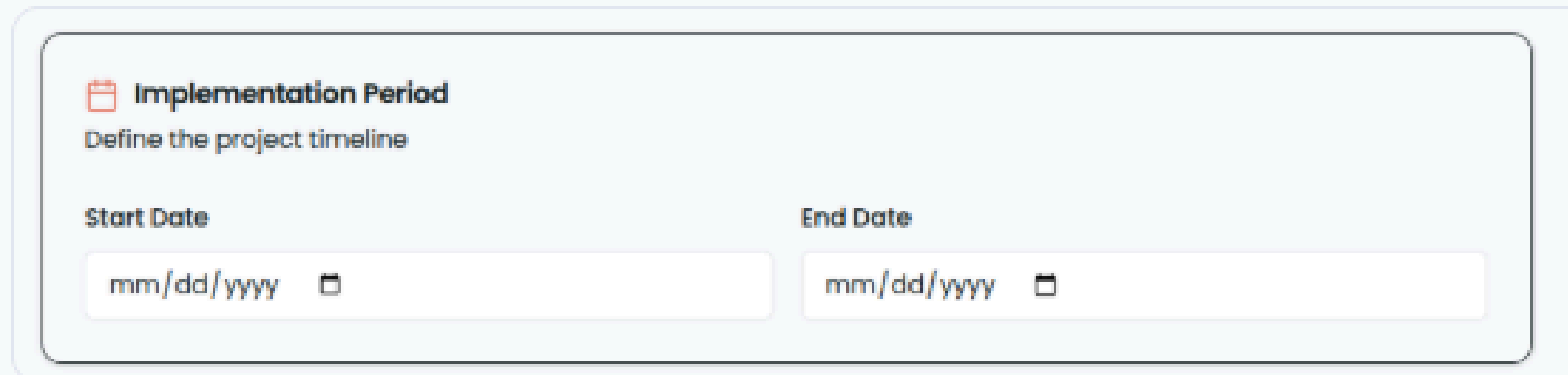
How to create a new project

3 Implementation Period

Set the project timeframe using the date pickers.

FIELD	REQUIRED	DESCRIPTION
Start Date	Yes	Official project start date.
End Date	No	Planned completion date. Must be <i>after</i> the Start Date.

Click the calendar icon to open the date picker, or type the date directly in YYYY-MM-DD format.



The screenshot shows a card titled "Implementation Period" with the subtitle "Define the project timeline". Below the title, there are two date picker fields. The first is labeled "Start Date" and the second is labeled "End Date". Both fields contain the placeholder text "mm/dd/yyyy" and a small calendar icon to the right of the text.

Implementation Period card — Start Date and End Date pickers.

How to create a new project

4 Involved Partners

Select which partner organizations participate in this project.

- Tick the checkbox next to each partner to include them.
- Each row shows the organization **name** and **type**.
- Multiple partners can be selected at once.

Involved Partners
Select partner organizations that will participate in this project

Partner 1

Involved Partners card — tick checkboxes to assign partners.

How to create a new project

5 Project Settings

Google Drive URLs

Attach shared Drive folder links to the project (resources, templates, etc.).

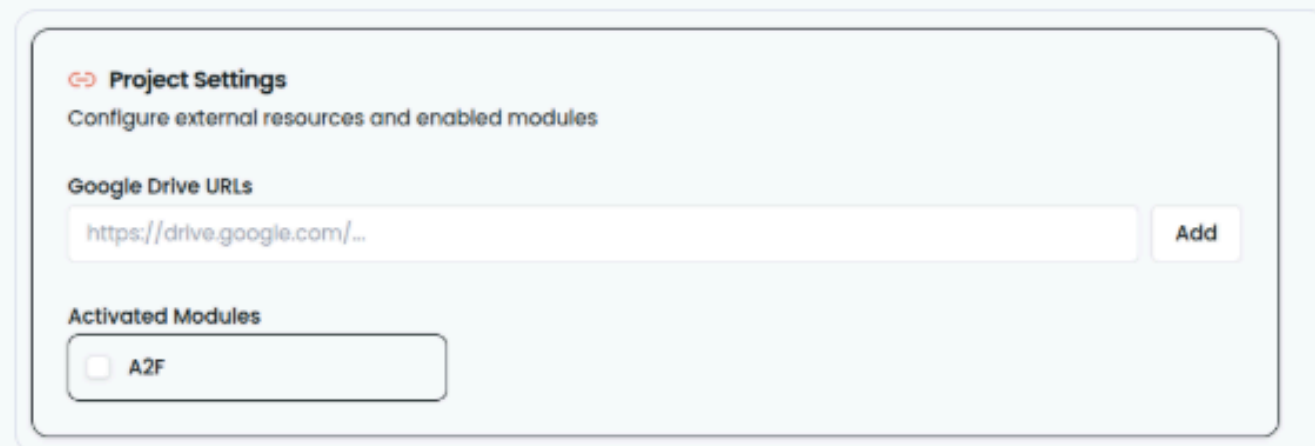
- Paste the full URL in the input field and click **Add**.
- Click **Delete** next to a URL to remove it.
- Multiple URLs are supported.

Activated Modules

Choose which optional modules are enabled. Currently available:

- **A2F** — Access to Finance module, enabling financial assessment forms and evaluations for beneficiaries.

Tick the checkbox next to each module to enable it. Modules can be changed later by editing the project.



The screenshot shows a 'Project Settings' panel with the following elements:

- Project Settings** header with a subtitle 'Configure external resources and enabled modules'.
- Google Drive URLs** section with a text input field containing 'https://drive.google.com/...' and an 'Add' button.
- Activated Modules** section with a checkbox and the label 'A2F'.

Project Settings — Google Drive URLs and Activated Modules.

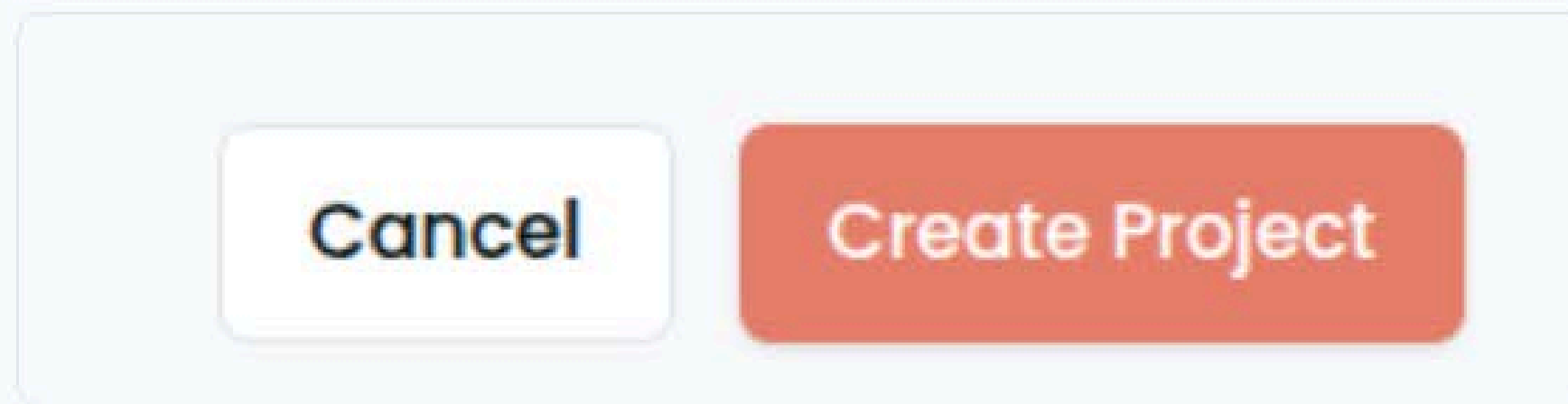
How to create a new project

6 Saving the project

At the bottom of the form:

- **Cancel** — discards all entries and returns to the dashboard.
- **Create Project** — validates and saves. On success you are redirected to the dashboard where the project now appears in the sidebar.

i If required fields are missing, a red error message appears at the bottom of the form. The required fields are **Name**, **Description**, and **Start Date**.



Cancel and Create Project buttons at the bottom of the form.

Project management (dashboard)

The project home page is reached by clicking a project name in the sidebar. It shows different content depending on your role — Admins and Partners see the project settings and details, while Beneficiaries see their assigned activities.

1 How to Access

Click any project name in the **Switch Project** section of the sidebar. The project is loaded into context and you land on the project dashboard automatically.

Project Test 1

Your activities and deliverables for this project

My Activities				
Activities	Type	Status	Progress	Actions
Test 3	Document	In Progress	1/1 completed	Request Validation
> Test 2	Document	Validated	2/2 completed	
> Test 1	Document	Validated	3/3 completed	

Clicking a project in the sidebar opens its dashboard.

Project management (dashboard)

2 Admin & Partner View — Project Settings

Admins and Partners see the **Project Settings** page with four read-only cards. Admins additionally see **Edit** and **Delete** buttons in the header.

The project settings page as seen by an Admin. Partners see the same page without the Edit/Delete buttons.

Card	Fields shown
Project Information	Name, project type, status badge, description
Implementation Period	Start date and end date
Project Settings	Google Drive URLs (clickable links), activated modules (badges)

Admin only: The **Edit** button turns all card fields into inline editable inputs (name, type, status, description, dates, Drive URLs, modules). Click **Save Changes** to persist. The **Delete** button opens a confirmation dialog — deletion is permanent and removes all project members.

Project management (dashboard)

3 Beneficiary View — My Activities

Beneficiaries land on the **My Activities** table. It lists every activity assigned to them in the current project, along with their completion status and progress.

Project Test 1

Your activities and deliverables for this project

Activities	Type	Status	Progress	Actions
Test 3	Document	In Progress	1/1 completed	Request Validation
> Test 2	Document	Validated	2/2 completed	
> Test 1	Document	Validated	3/3 completed	

The My Activities table on the beneficiary's project dashboard.

Column	Description
↑ (expand)	Arrow icon appears when an activity has more than one item (forms + requirements). Click to expand sub-rows.
Activity	Title and short description of the activity.
Type	Activity type badge (Document, Evaluation, Workshop, etc.).
Status	Current submission status: <i>In Progress</i> , <i>Pending Validation</i> , <i>Validated by Partner</i> , or <i>Validated</i> .
Progress	<i>X/Y completed</i> counter — turns green when all items are done, orange if partially done, red if none started.
Actions	Request Validation button appears only when all items are completed and status is still <i>In Progress</i> .

Project management (dashboard)

4 Expanding a Multi-Item Activity

When an activity contains multiple forms or document requirements, a ► chevron appears in the first column. Click the row to expand it and see each individual item as a sub-row.

▼ Test 2	Document	Validated	2/2 completed
📄 Form	Submitted	Form	
⬆️ How are you?	Submitted	Text	

Expanded activity showing form and requirement sub-rows. Completed items show a green "Submitted" badge.

- **Form sub-row** — 📄 icon + form title. Click to open the form. Shows a green *Submitted* badge if already completed.
- **Requirement sub-row** — ⬆️ icon + requirement description + type badge (Document or Text). Click to open the activity detail page.

Project management (dashboard)

5 Requesting Validation

Once all forms and requirements of an activity are completed and the activity is still in *In Progress* status, a **Request Validation** button appears in the Actions column. Clicking it changes the status to **Pending Validation** and notifies the responsible Partner or Admin.

Progress	Actions
1/1 completed	Request Validation

The "Request Validation" button appears only when progress is 100% and status is In Progress.

After requesting validation the button disappears and the status badge changes to

Pending Validation






. Further editing of the activity is locked until the validator approves or requests changes.

Activities

Tasks assigned to beneficiaries within a project — forms to fill, documents to upload, workshops to attend, and evaluations to complete.

1 Overview

An **Activity** is a structured task created by an Admin and assigned to beneficiaries. Each activity has a type, a deadline, and can include forms and document requirements. The lifecycle goes from creation to validation.

ACTIVITY TYPE	PURPOSE
 Document	Beneficiary uploads one or more files (certificates, reports, etc.).
 Explicatie	Beneficiary provides a written explanation or text answer.
 Evaluare	Beneficiary completes a scored assessment form to evaluate progress.
 Workshop	An interactive session; may include forms or document submissions.
 Training	An educational program with associated deliverables.

Activities

Status flow

Each activity progresses through a status sequence managed by Admins:

- **Draft** — created but not yet visible to beneficiaries.
- **Active** — beneficiaries can see and submit their work.
- **Completed** — all submissions reviewed; activity closed.
- **Cancelled** — activity was abandoned.

 Statuses and their colors can be customized by Admins in **Settings** → **Activity Statuses**.

Activities

2 Activities list page

Accessed via **Activities** in the sidebar. Shows all activities for the current project.

- **Filter by status** — narrow to a specific status (Draft, Active, etc.).
- **Filter by type** — show only a specific activity type.
- **Filter by date range** — filter by creation date.
- **Table rows** — each row shows title, type, status, and date range. Click a row to open the activity detail.
- **Create New Activity** button **ADMIN** — opens the creation form (see step 4).
- **Print / Download** icons — export the current list.

Activities Management
Manage project activities, forms, and assignments

[Create New Activity](#)

Filters

Status: Created From: Created To: Activity Type:

Search:

Activity Title	Activity Type	Status	Start Date	End Date
Test 3	Document	Draft	20.02.2026	18.03.2026
Test 2	Document	Draft	20.02.2026	21.03.2026
Test1	Document	Draft	20.02.2026	28.02.2026

Rows per page: 1-3 of 3

Activities list — filters, table, and Create New Activity button.




Activities

3 Activity detail page

Click any row in the list to open the detail page. The layout adapts depending on your role.

Header

Shows the activity **title**, **type badge**, **status badge**, and **date range**. A time-remaining badge appears in the top-right corner:

-  **Overdue** — past the end date.
-  **X days left** — fewer than 7 days remaining.
-  **X days left** — more than 7 days remaining.

Assigned Beneficiaries & Partners

Cards listing the organizations assigned to this activity, shown as avatar initials with organization names.

Deliverables (Documents & Forms tabs)

- **Documents tab** — support materials provided by the Admin (files or links). Beneficiaries can view and download them.
- **Forms tab** — assessment forms attached to this activity.
 - **BENEFICIARY** sees an **Open Form** button to fill the form.
 - **ADMIN** / **PARTNER** see a **View Submissions** button to review all beneficiary answers.

Activities

Requirements section **BENEFICIARY VIEW**

Each requirement card shows what the beneficiary must submit:

- **Document requirement** — a file upload field. After uploading, a preview/download link appears.
- **Text requirement** — a text input field with a **Submit** button.
- Once all requirements and forms are submitted, a **Request Validation** button becomes available — clicking it sends the submission to the Admin/Partner for review.

Beneficiary Submissions **ADMIN** / **PARTNER** view

A list of all organizations that have submitted work, with their current validation status. Click a row to open the validation page for that submission.

Admin Settings panel **ADMIN**

A sticky right-sidebar panel with a **Status** dropdown. Admins can move the activity between Draft, Active, Completed, and Cancelled at any time.

Activities

The screenshot shows the 'Activity Details' page for 'Test 3'. At the top, there is a breadcrumb 'Activities > Activity Details', a 'Draft' status, a date range '20.02.2026 - 11.03.2026', and a 'Settings' button. Below this is a 'Description' section with the text 'No description provided.' and a '15 days left' timer. The 'Requirements (1)' section contains an 'Upload a document' button and a table with two rows: 'Beneficiary 1' with status 'Not submitted' and 'Beneficiary 2' with status '-'. The 'Beneficiary Submissions (2)' section shows two rows for 'Beneficiary 1' and 'Beneficiary 2', both with status 'In Progress' and a 'Review' button.

Activity detail — header, deliverables tabs, requirements, and Admin settings panel.

Activities

4 Reviewing & validating submissions

When a beneficiary clicks **Request Validation**, the Admin/Partner is notified and can open the **Validation page**.

Left column — submissions


- **Requirements** — text and file submissions are shown with preview/download buttons.
- **Forms** — each attached form shows its submission status. Click a form row to view the beneficiary's answers in full.

Right sidebar — validation actions

- **Validate Activity** — approves the submission. Status becomes **Validated by Partner** or **Validated by Admin**.
- **Require Completion** — sends the submission back to the beneficiary with a written comment explaining what needs to be fixed.

Activity History timeline

Below the actions, a timeline shows every status change: who made it, when, and any accompanying comment.

 PDF documents can be previewed inline directly on the validation page — no need to download to review.

Activities

4 Reviewing & validating submissions

When a beneficiary clicks **Request Validation**, the Admin/Partner is notified and can open the **Validation page**.

Left column — submissions


- **Requirements** — text and file submissions are shown with preview/download buttons.
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Right sidebar — validation actions

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Activity History timeline

Below the actions, a timeline shows every status change: who made it, when, and any accompanying comment.

 PDF documents can be previewed inline directly on the validation page — no need to download to review.

Activities

← Activity Details → Review Submission

Test 3 Beneficiary 1 In Progress

Requirements (1)

Upload a document Document test submitted

No response submitted yet.

Validation Actions

Validation is only available when the beneficiary has requested it (status: Pending Validation).

Validate Activity

Require Completion

Submission History

No history yet.

Validation page — submissions on the left, validate/require completion actions on the right.

Activities

5 Creating a new activity ADMIN

Click Create New Activity on the list page. The form has three cards.

Card 1 — Core Definition

FIELD	REQUIRED	DESCRIPTION
Activity Title	Yes	Short descriptive name, e.g. "Upload Registration Certificate".
Activity Type	Yes	Choose one of five visual cards: Document , Explicație , Evaluare , Workshop , or Training . The selected card is highlighted with a coloured border.
Description	No	Detailed instructions and context shown to beneficiaries.


Activities

Core Definition


Define the activity name, type, and description

Activity Title *


Activity Type *




Document
Request file uploads




Explanation
Provide information



Evaluation
Evaluate progress



Workshop
Interactive session



Training
Educational program


Description

Core Definition — Title field and five Activity Type selector cards.

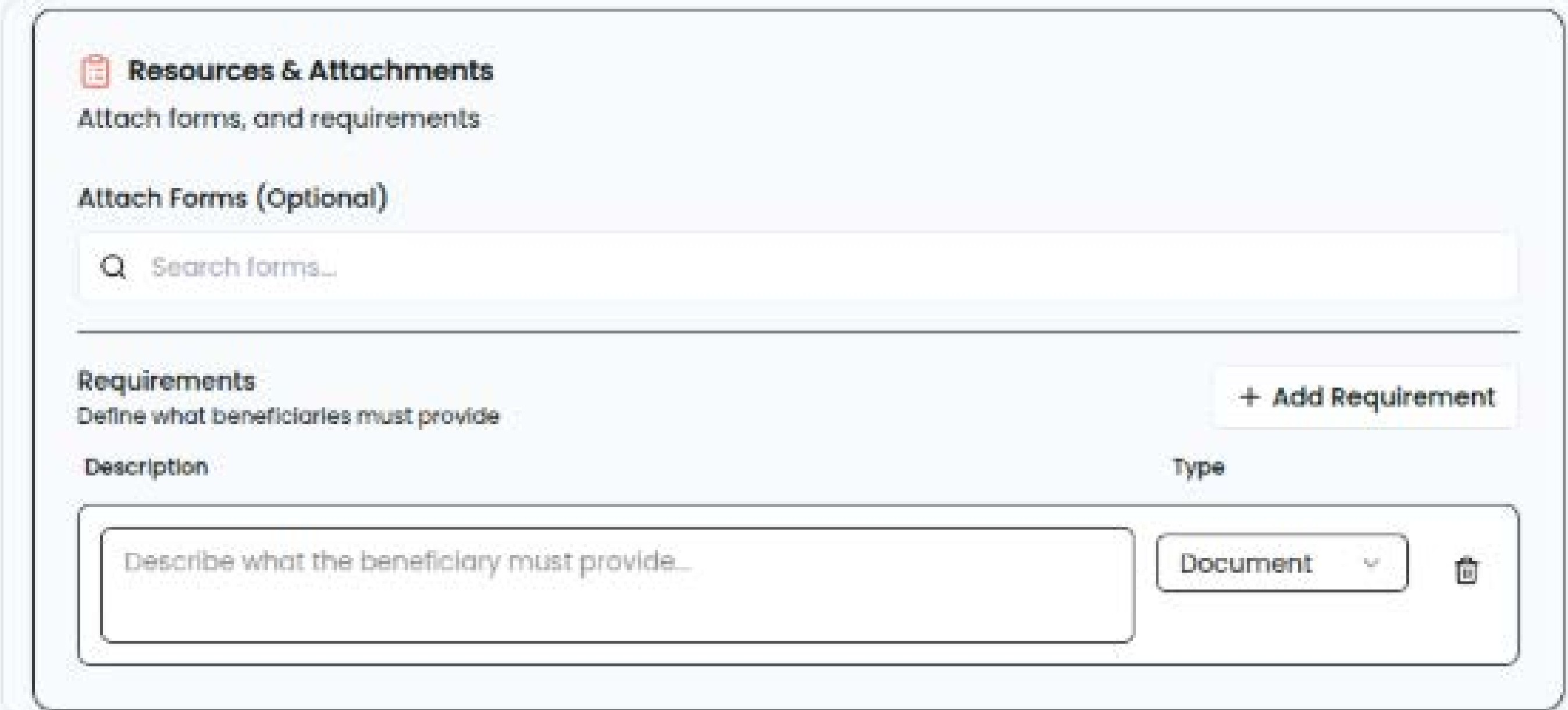
Activities

Card 2 — Resources & Attachments

Attach supporting materials that beneficiaries will use to complete the activity.

FIELD	REQUIRED	DESCRIPTION
Attach Forms	No	Select one or more form templates from the multi-select dropdown. Beneficiaries will be asked to complete these forms as part of the activity.
Document Requirements	No	<p>Define what beneficiaries must submit. Click + Add Requirement to add a row.</p> <p>Each requirement has:</p> <ul style="list-style-type: none"> • Description — instructions for what to submit. • Type — <i>Document</i> (file upload) or <i>Text</i> (written answer). <p>Click the  trash icon to remove a requirement.</p>

Activities



The screenshot displays the 'Resources & Attachments' section of a software interface. It features a search bar for forms, a section for defining requirements with an 'Add Requirement' button, and a table for managing requirements. The table has columns for 'Description' and 'Type'. A single requirement is shown with the description 'Describe what the beneficiary must provide...' and the type 'Document'. A trash icon is visible next to the requirement type.

Resources & Attachments
Attach forms, and requirements

Attach Forms (Optional)

Search forms...

Requirements
Define what beneficiaries must provide

+ Add Requirement

Description	Type
Describe what the beneficiary must provide...	Document




Resources & Attachments — form selector and document requirements builder.


Activities

Card 3 — Timeline

FIELD	REQUIRED	DESCRIPTION
Start Date	Yes	When the activity becomes available to beneficiaries. Defaults to today.
End Date	Yes	Deadline for submissions. Must be after the Start Date.

After both dates are set, a **Duration** chip appears automatically:

-  **Warning** (orange) — duration is 3 days or fewer, or the same day.
-  **Normal** (grey) — duration is 4 days or more.
-  **Error** (red) — end date is before start date.

 **Timeline**

Set the activity start and end dates

Start Date *

End Date *

Cancel
Create New Activity

Timeline card — Start Date, End Date, and automatic Duration chip.

Activities

Saving

- **Cancel** — discards entries and returns to the Activities list.
- **Create New Activity** — validates and saves. The activity is created with status **Draft** by default. Change it to Active from the detail page when ready.

i A new activity starts as **Draft** — beneficiaries cannot see it until an Admin switches the status to **Active** using the settings panel on the detail page.



Pre-assessment process

Assessment forms that beneficiaries fill in as part of activities. Results are scored automatically and can be reviewed by Admins and Partners.

1 Overview

A **Form** is a structured questionnaire attached to an activity. After a beneficiary submits their answers, the system calculates a score and readiness level automatically. Admins and Partners can then review all submissions in one place.

Question types

TYPE	HOW IT LOOKS	HOW IT SCORES
Boolean	Two large buttons:  	TRUE/FALSE counts used in percentage or threshold scoring.
Single choice	Radio buttons — select one option.	Each option carries a point value; selected option's score is added.
Multiple choice	Checkboxes — select one or more options.	Points for each selected option are summed.
Scale	Radio buttons on a numeric scale (e.g. 1–5).	Selected value is added to the total score.

Pre-assessment process

Scoring strategies

STRATEGY	HOW IT WORKS
Additive	Sums all option scores into a total. The total is matched against ranges to determine a level (e.g. Low / Medium / High).
Percentage	Calculates the percentage of TRUE answers. The percentage determines a readiness level.
Threshold (TRL)	Checks whether each section individually meets a required threshold. Used for Technology Readiness Level (TRL) assessments.

Pre-assessment process

2 Forms list page

Accessed via **Forms** in the sidebar. Shows all forms attached to activities in the current project, displayed as cards.

Each card shows:

- Form **icon** and **title**.
- Number of **sections** and **questions**.
- A list of **section names**.
- An action button — its label depends on your role and submission status:

ROLE & STATE	BUTTON LABEL
ADMIN PARTNER — any state	View Submissions
BENEFICIARY — not yet started	Start Assessment
BENEFICIARY — revision requested by reviewer	Revise & Resubmit
BENEFICIARY — submission validated	View Results

Pre-assessment process

Project Forms
Assessment forms assigned to your project

- Project Readiness Assessment**
4 sections | 13 questions
 - Project relevance and clarity
 - Innovation & added value
 - Financial feasibility
 - Administrative capacity[View Submissions](#)
- Go-To-Market Readiness**
4 sections | 18 questions
 - Market value Clarity
 - Customer and Market Understanding
 - Business Model and Monetization
 - Go-To-Market Strategy[View Submissions](#)
- TRL Assessment**
8 sections | 62 questions
 - TRL 1
 - TRL 2
 - TRL 3
 - TRL 4
 - TRL 5
 - TRL 6
 - TRL 7
 - TRL 8
 - TRL 9[View Submissions](#)

Forms list — grid of assessment form cards with action buttons.

Pre-assessment process

3 Filling a form BENEFICIARY

Click (or) on a form card to open the assessment. The form is organised into collapsible sections.

Status banner

A coloured badge at the top of the form shows the current submission state:

- **Not Started** — form has not been submitted yet.
- **Submitted** — answers were submitted and are awaiting review.
- **Revision Required** — the reviewer has sent it back with comments. The reviewer's note is shown below the banner.


Sections & progress

- Each section is a collapsible card with a numbered badge. Click the header to expand or collapse it.
- A **section progress bar** fills as you answer questions in that section.
- An **overall progress bar** at the top of the form tracks total completion.
- Completed sections are highlighted in green.
- Use / to manage all sections at once.

Pre-assessment process

Submitting

Once all required questions are answered, the **Submit** button becomes active. After submission you are taken directly to your results.

 If revisions were requested, your previous answers are pre-filled — you only need to change the items flagged by the reviewer.

Pre-assessment process

Instructions

Answer each question with TRUE or FALSE based on your current go-to-market readiness. Your overall GTM readiness is calculated based on the percentage of TRUE answers.

Overall Progress 8/18 TRUE (44%)

1 Market Value Clarity 6/6 answered
4 TRUE

2 Customer and Market Understanding 4/4 answered
4 TRUE

1. The primary customer segment is clearly defined.

TRUE FALSE

2. The market size is known.

TRUE FALSE

3. Interviews or focus groups were conducted with potential customers.

TRUE FALSE

Assessment form — collapsible sections, progress bars, and question types.

Pre-assessment process

4 Viewing your results BENEFICIARY

After submitting, the results page appears automatically. You can also reach it later via the [View Results](#) button on the Forms list.

Overall score card

A prominent card at the top shows your **total score** and **readiness level** (e.g. Low / Medium / High or a TRL level). The level label and colour depend on the form's scoring configuration.

Section breakdown

Each section is listed with its individual score and level. Sections below the threshold may be highlighted in red or orange.

Recommendations

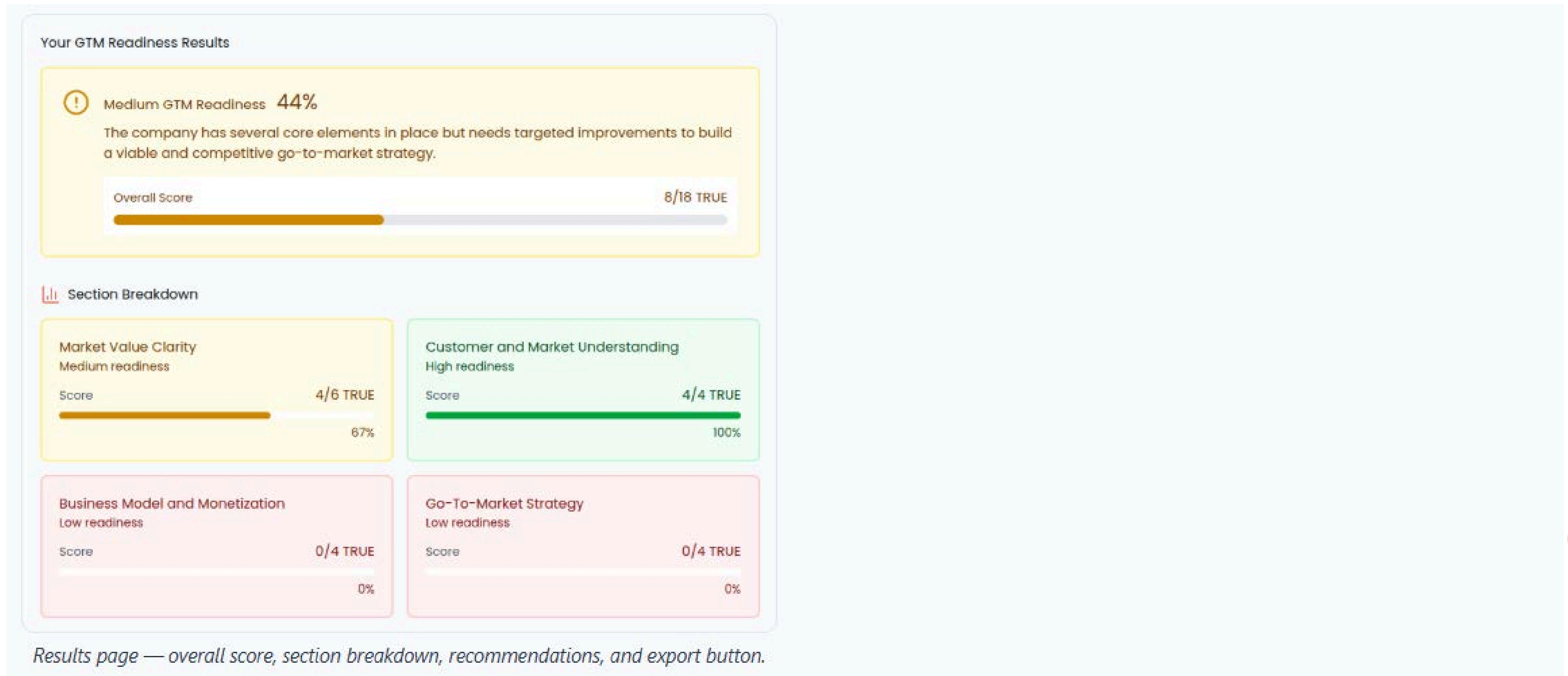
Personalised recommendations based on your answers:

- **Additive forms** — item-by-item suggestions for each question you answered below the maximum.
- **Percentage / Threshold forms** — grouped recommendations by section.
- If all answers are optimal, a success message is shown instead.

Export

Click [Export Results](#) to download your results as an HTML file that can be printed or saved.

Pre-assessment process



Pre-assessment process

5 Reviewing all submissions ADMIN PARTNER

Click View Submissions on a form card to see every beneficiary's submission in a table.

Submissions table

COLUMN	WHAT IT SHOWS
Organization	Name of the beneficiary organization that submitted.
Score	Calculated total score, colour-coded by level (● high · ● medium · ● low).
Level	Readiness level label derived from the score range.
Submission Date	Timestamp of the last submission.

- Click any row to open the full **submission detail view** (step 6).
- An Export button per row lets you download that submission as an HTML report.

Pre-assessment process

Project Readiness Assessment

Q Search...

Organization	Score	Level	Submitted	
BE Beneficiary 1	Not submitted	–	–	Export
BE Beneficiary 2	19/30	Medium Overall Readiness	23.02.2026	Export

Rows per page 20 1-2 of 2

Submissions table — all beneficiary results with colour-coded scores.

Pre-assessment process

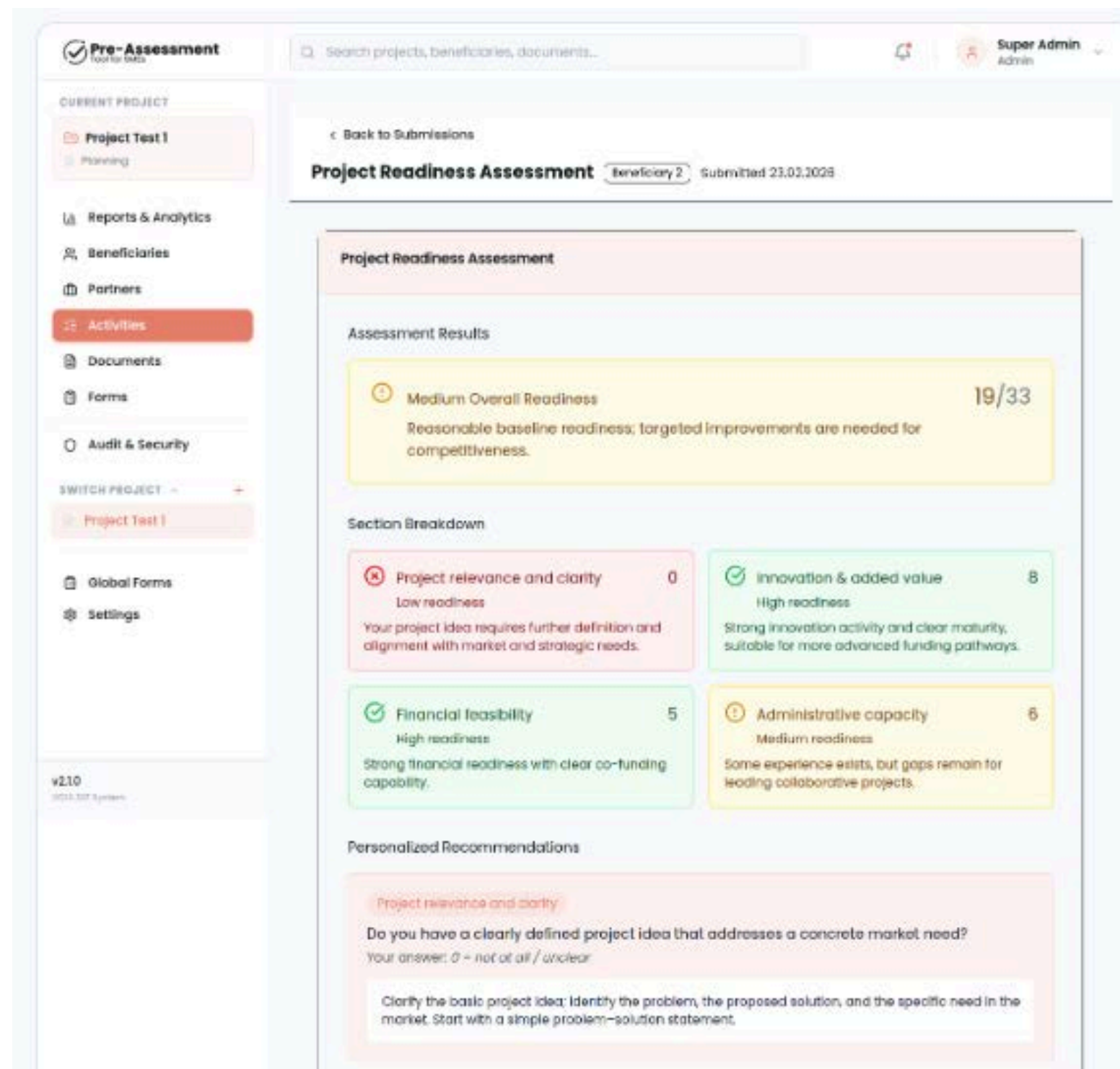
6 Submission detail view ADMIN PARTNER

Click a row in the submissions table to open the result for that beneficiary. This view shows **scores and recommendations**.

- **Header** — form title, beneficiary organization name (as a badge), and submission date.
- **Overall score card** — the calculated total score and readiness level for this submission.
- **Section breakdown** — each section's individual score and level.
- **Recommendations** — generated recommendations based on the scoring result.
- **Back button** — returns to the submissions table for that form.

i Admins and Partners see only the **computed results** (scores and recommendations), not the beneficiary's individual answers to each question.

Pre-assessment process



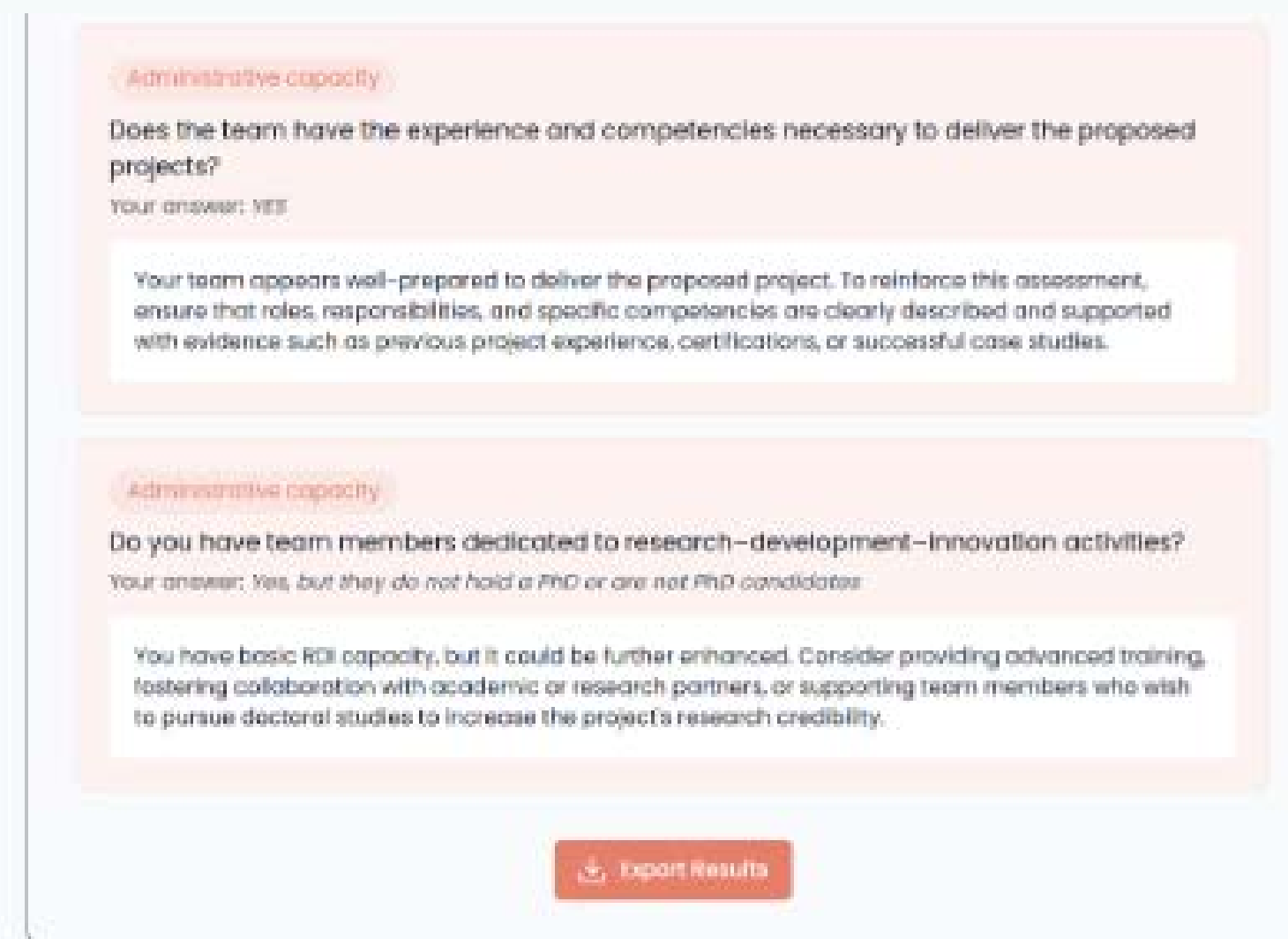
The screenshot shows the 'Project Readiness Assessment' results for 'Beneficiary 2', submitted on 23.03.2024. The overall score is 19/33, categorized as 'Medium Overall Readiness'. The assessment results are broken down into four sections:

Section	Score	Readiness Level	Description
Project relevance and clarity	0	Low readiness	Your project idea requires further definition and alignment with market and strategic needs.
Innovation & added value	8	High readiness	Strong innovation activity and clear maturity, suitable for more advanced funding pathways.
Financial feasibility	5	High readiness	Strong financial readiness with clear co-funding capability.
Administrative capacity	6	Medium readiness	Some experience exists, but gaps remain for leading collaborative projects.

Personalized Recommendations for 'Project relevance and clarity':

Do you have a clearly defined project idea that addresses a concrete market need?
Your answer: 0 - not at all / unclear

Clarify the basic project idea; identify the problem, the proposed solution, and the specific need in the market. Start with a simple problem-solution statement.



Administrative capacity

Does the team have the experience and competencies necessary to deliver the proposed projects?
Your answer: YES

Your team appears well-prepared to deliver the proposed project. To reinforce this assessment, ensure that roles, responsibilities, and specific competencies are clearly described and supported with evidence such as previous project experience, certifications, or successful case studies.

Administrative capacity

Do you have team members dedicated to research-development-innovation activities?
Your answer: Yes, but they do not hold a PhD or are not PhD candidates

You have basic RDI capacity, but it could be further enhanced. Consider providing advanced training, fostering collaboration with academic or research partners, or supporting team members who wish to pursue doctoral studies to increase the project's research credibility.

[Export Results](#)

Submission detail — computed scores, section breakdown, and recommendations for one beneficiary.

Pre-assessment process

7 Global Forms ADMIN

Accessed via **Global Forms** at the bottom of the sidebar (no project context required). This is where Admins manage the master library of form templates that can be attached to any activity.

Global Forms list

All form templates are shown as cards with an icon (readiness, TRL, GTM), title, and the number of sections and questions.

- Click any card to open the **template preview**.

Template preview page

A two-tab interface for inspecting a form template before deploying it to an activity:

- **Form Preview tab** — renders the full form as a beneficiary would see it. Admins can fill in test answers to try the form.
- **Results Preview tab** — shows the scoring results for the test answers entered in the Form Preview tab. Useful for verifying that scoring ranges and recommendations are configured correctly.

i Answers entered in Form Preview are shared with Results Preview — click **Results Preview** after filling the test form to see how the scoring will look.

Pre-assessment process

Form Templates

Manage assessment form templates

Project Readiness Assessment

4 sections 13 questions

- Project relevance and clarity
- Innovation & added value
- Financial feasibility
- Administrative capacity

View Template

Go-To-Market Readiness

4 sections 18 questions

- Market Value Clarity
- Customer and Market Understanding
- Business Model and Monetization
- Go-To-Market Strategy

View Template

TRL Assessment

9 sections 62 questions

- TRL 1
- TRL 2
- TRL 3
- TRL 4
- TRL 5
- TRL 6
- TRL 7
- TRL 8
- TRL 9

View Template

Global Forms list — master library of form templates for Admins.

Pre-assessment process


Form template preview — Form Preview tab (left) and Results Preview tab (right).

Documnets

A unified view of all files uploaded by beneficiaries across every activity in the project.

1 Overview




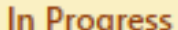
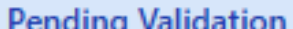
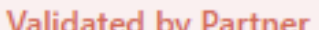
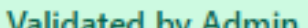
The Documents page aggregates every file that beneficiaries have uploaded as part of activity requirements. It is a **read-only view** — files can be previewed or downloaded but not added, edited, or deleted from here. Files are created through activity submissions.

 To upload a document, beneficiaries must do so via the **activity detail page** by completing a Document-type requirement.

Pre-assessment process

2 Documents table

Accessed via **Documents** in the sidebar. All uploaded files for the current project are listed in a searchable, sortable table.


COLUMN	WHAT IT SHOWS
File	File name with a type icon and a format badge (PDF, PNG, DOCX, etc.): <ul style="list-style-type: none">  PDF — red icon  Image — blue icon  Other — grey paperclip icon
Activity	Name of the activity this file was submitted for.
Beneficiary	Name of the beneficiary organization that uploaded the file.
Status	The validation status of the activity result this document belongs to: <ul style="list-style-type: none">  In Progress — submission is still in progress.  Pending Validation — awaiting review.  Validated by Partner — approved by partner.  Validated by Admin — fully approved.

Pre-assessment process

3 Opening files

Click any row to open the file. The behaviour depends on the file type:

- **PDF files** — an inline **PDF preview modal** opens directly in the browser. You can scroll through the document without downloading it. Close it with the × button.
- **Images and other file types** — the file is **downloaded** immediately to your device.

 PDFs can be reviewed without leaving the page. For other file types, use the download and open them in the appropriate application.

Documents
Documents uploaded by beneficiaries across project activities

Search...

File	Activity	Beneficiary	Status
 brand_guidelines_diz_1771853674.pdf	Test1	Beneficiary 2	Validated by Admin
 screenshot_from_2026-02-20_09-49-36_1771924403.png	Test 3	Beneficiary 2	In Progress

Rows per page: 20 | 1-2 of 2 | « < > »

Documents page — file table with type icons, activity/beneficiary columns, and status badges.



Inline PDF preview modal — opens when clicking a PDF row.

Partners & Beneficiaries

Two closely related sections for managing organizations within a project. Partners manage beneficiaries; beneficiaries receive services.

1 Overview

Both sections share the same visual structure: a filterable list page and a detail page. The main differences are the access level and the information shown on the detail page.

FEATURE	PARTNERS	BENEFICIARIES
Who can see the list	ADMIN	ADMIN PARTNER
Who can add new	ADMIN	ADMIN PARTNER
Detail tab: Managed Beneficiaries	✔ Shows all beneficiaries managed by this partner	— (not applicable)
Detail tab: Managed By Partner	— (not applicable)	✔ Shows the partner responsible for this beneficiary
Detail tabs	Managed Beneficiaries · Organization Details	Details · Forms · Documents

Partners & Beneficiaries

2 List page

Accessed via **Partners** or **Beneficiaries** in the sidebar. Both list pages work identically:

- **Filter by status** — show Active, Suspended, or Pending organizations.
- **Filter by date range** — narrow results by creation date.
- **Table rows** — each row shows the organization name, type, status, and creation date. Click a row to open the detail page.
- **Add New Partner** / **Add New Beneficiary** button (top-right) — opens the creation form (see step 4).

Partners Management
Manage partner organizations and their profiles

Filters

Status: Created From: Created To:

Search:

Organization	Created	Last Activity	Invitation Expiry	Status
Partner 1	19.02.2026	19.02.2026	--	Invited

Rows per page: 20 | 1-1 of 1

Partners list page — filterable table with Add New Partner button.

Partners & Beneficiaries

3 Partner detail page

Click any row in the Partners list to open the detail page.

Header

Shows the partner's **logo** (if set), **name**, **type**, **fiscal code**, and current **status**. Admin action buttons appear in the top-right corner:

- **Edit** — open the edit form to modify partner details.
- **Suspend** / **Reactivate** — toggle the partner's active status.

KPI cards

Three summary cards show the partner's beneficiary portfolio at a glance:

- **Portfolio Size** — total number of beneficiaries managed by this partner.
- **Validation Load** — number of inactive (pending validation) beneficiaries.
- **Validated** — number of active (validated) beneficiaries.

Tabs

- **Managed Beneficiaries** — table of all beneficiary organizations this partner is responsible for. Includes name, type, creation date, and status.
- **Organization Details** — full profile: type, founding year, domain codes, address, website, description.

Partners & Beneficiaries

Partner detail page — KPI cards and Managed Beneficiaries tab.

Partners & Beneficiaries

4 Beneficiary detail page

Click any row in the Beneficiaries list to open the detail page.

Header

Shows the beneficiary's **name**, **type badge**, **role badge**, **status**, and **fiscal code**. Action buttons:

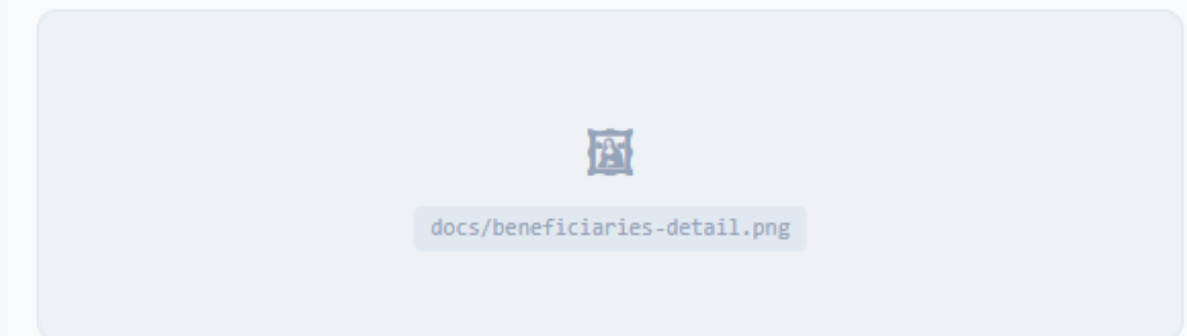
- **Edit** — modify beneficiary details.
- **Suspend** / **Reactivate** — toggle status.

Managed By Partner

A card showing which partner organization is responsible for this beneficiary. Admins can click **Reassign** to move the beneficiary to a different partner.

Tabs

- **Details** — organization profile: size, founding year, address, website, legal representative.
- **Forms** — assessment forms assigned to this beneficiary (feature in progress).
- **Documents** — documents linked to this beneficiary (feature in progress).



Beneficiary detail page — header, Managed By Partner card, and tabs.

Partners & Beneficiaries

5 Adding a new Partner or Beneficiary

Click or on the list page. The same creation form is used for both — only the organization role differs.

Organization Information

FIELD	REQUIRED	NOTES
Organization Name	Yes	Full legal name.
Fiscal Code	Yes	Must be unique across the system.
Type	Yes	Company, ONG, Public Institution, or Cluster.
Size	No	Micro, Small, Medium, or Large.
Founding Year	No	Four-digit year.
Address	No	Registered address.
Description	No	Brief description of the organization.
Website	No	Organization website URL.

Partners & Beneficiaries

Legal Representative

Contact details for the person legally representing the organization:

- **Name, Function/Title, Email, Phone Number**

Invite or create directly

After filling in the organization details, choose how to add the user account:

- **Send Invitation** — an email invitation is sent to the legal representative's address. The recipient registers using the invite link. The invitation expires after **72 hours**.
- **Create directly** — creates the user account immediately without sending an email (useful when the admin manages onboarding manually).

i For invitations to work, at least one **email template** must be configured in **Settings** → **Email Templates**. If no template exists, only direct creation is available.

Partners & Beneficiaries

Create New Beneficiary
Add a new beneficiary organization to the system

Organization Information
Enter the basic details of the organization

Organization Name * Fiscal Code

Organization Type *

Assign to my organization
This beneficiary will be managed by your organization.

Main Domain (CAEN Code) * Secondary Domain (CAEN Code)

Founding Year *

Address

Description

Legal Representative
Information about the organization's legal representative

First Name * Last Name *

Email Address *

Online Presence (optional)
Website and branding assets

Website URL

Logo URL Banner URL

New organization form — Organization Information, Legal Representative, and invite/create options.






💡 After a new organization is saved, it appears immediately in the list and can be assigned to other projects without re-entering data.

Settings

System-wide configuration for Admins — email templates, activity statuses, and more. **ADMIN ONLY**

1 Settings hub

Accessed via **Settings** at the bottom of the sidebar. The hub displays a grid of configuration cards. Click any active card to enter that settings area.

CARD	WHAT IT CONFIGURES	STATUS
 Email Templates	Templates for invitation and notification emails sent by the system.	Active
 Activity Statuses	Custom status labels and their display colors used across all activities.	Active
 General Settings	General application configuration.	<i>Coming soon</i>
 Notifications	Notification preferences.	<i>Coming soon</i>
 Security	Security settings and access controls.	<i>Coming soon</i>

Cards marked *Coming soon* are greyed out and cannot be clicked.

Settings

Cards marked *Coming soon* are greyed out and cannot be clicked.

Settings
Manage application settings and configurations

- Email Templates**
Manage email templates for invitations, notifications, and more
- Activity Statuses**
Manage activity status types and their display colors
- General Settings**
Configure general application settings
Coming soon
- Notifications**
Configure notification preferences
Coming soon
- Security**
Manage security settings and access controls
Coming soon

Settings hub — grid of configuration cards, greyed cards are coming soon.

Settings

2 Email Templates




Click the **Email Templates** card to manage the HTML email templates used when sending invitations and system notifications.

Templates table

Each row represents one email template. The columns are:

COLUMN	WHAT IT SHOWS
Action	The event that triggers this email (e.g. <i>Invite Partner, Invite Beneficiary</i>). Each action can only have one template.
Subject	The email subject line.
CC	Optional CC email address included on every send.
Created	Date the template was created.

Row actions

-  **Preview** — opens a modal showing a rendered preview of the email HTML and subject.
-  **Edit** — opens the editor modal to change the subject, CC, or HTML body.
-  **Delete** — deletes the template after confirmation.

Settings

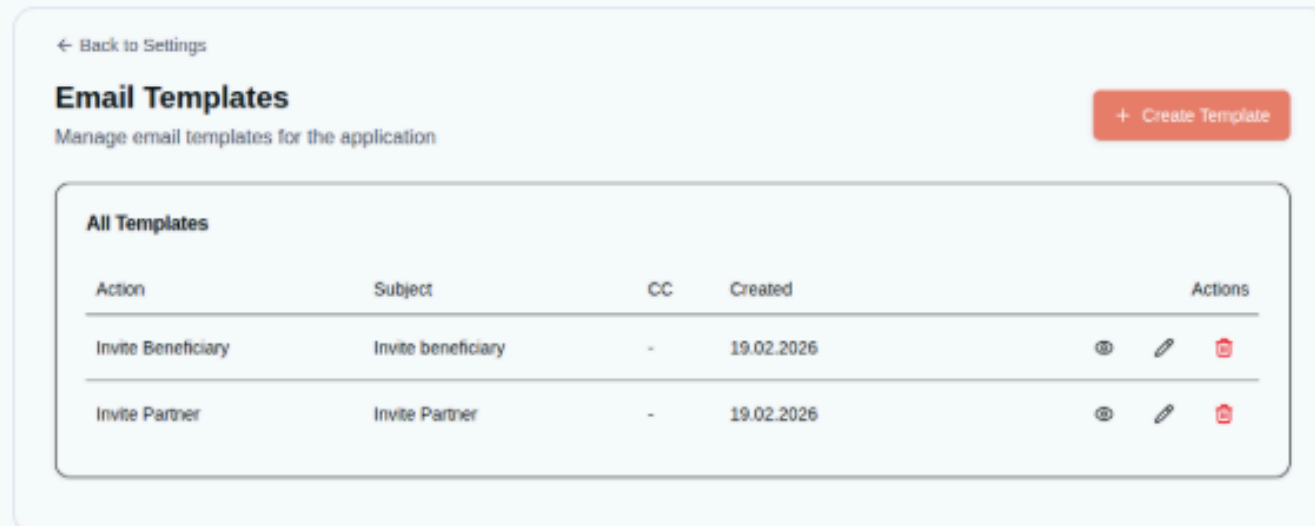
Creating a new template

Click **+ Create Template** (top-right). A modal opens with:

- **Action** — select which event this template handles. Only actions without an existing template are available.
- **Subject** — the email subject line.
- **CC** — optional CC address.
- **HTML body** — the full HTML content of the email.

⚠ The **+ Create Template** button is **disabled** when all available actions already have a template. Delete an existing template first to replace it.

i At least one email template must exist for the invitation workflow (Add New Partner / Beneficiary) to offer the *Send Invitation* option. Without a template, only direct creation is available.



Email Templates page — table with Preview, Edit, Delete actions and Create Template button.

Settings



3 Activity Statuses

Click the **Activity Statuses** card to manage the status labels shown on activities throughout the app.

Statuses table

COLUMN	WHAT IT SHOWS
Status Name	The label displayed as a coloured badge using the configured colour.
Color	A colour swatch and the hex code (e.g. #27AE60).
System Status	A <i>System</i> badge marks built-in statuses (Draft, Active, Completed, Cancelled). Custom statuses show a dash.


Row actions

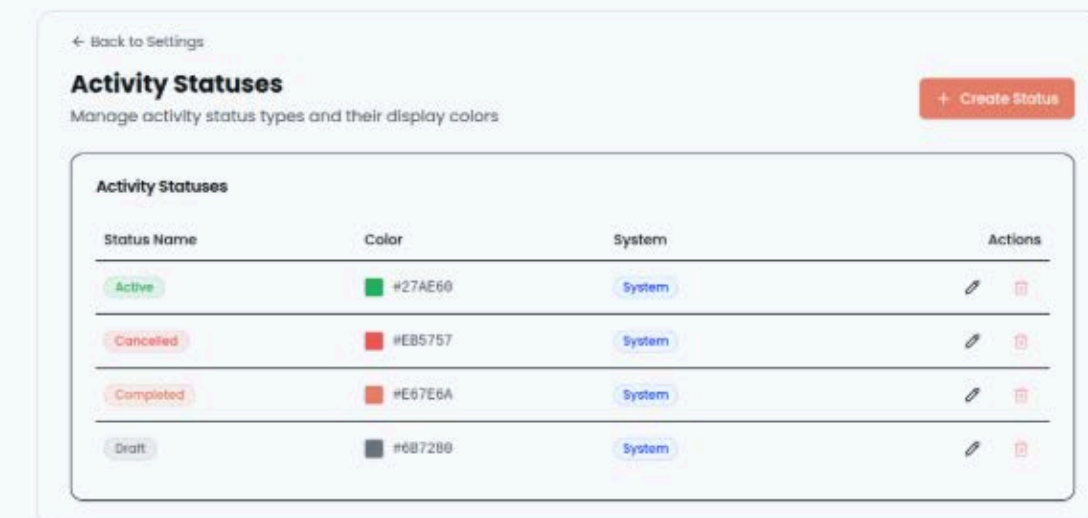
-  **Edit** — change the name or colour of any status.
-  **Delete** — remove a custom status. **System statuses cannot be deleted** — the trash icon is disabled for them.

Creating a new status

Click **+ Create Status**. A modal opens with:

- **Status Name** — a short label (up to 50 characters), e.g. "In Review".
- **Color** — click the colour picker to choose any hex colour. A live preview badge updates as you pick.

 Custom statuses appear in the activity status dropdown alongside the four built-in statuses. Use them to add intermediate workflow steps specific to your project.



Activity Statuses — coloured badge previews, system status indicator, and colour picker in the create/edit modal.

Conclusion

Conclusion

Deliverable **D3.2 presents the Pre-Assessment Tool for SMEs I3** as a structured digital framework developed within the SustainX project to standardize and operationalize SME evaluation processes. The tool integrates pre-assessment, documentation management and monitoring within a unified governance structure, ensuring methodological consistency and transparency.

By applying a multi-dimensional evaluation model – covering organizational capacity, innovation readiness, TRL, strategic positioning, sustainability, financial readiness and compliance preparedness – the tool enables a comprehensive and comparable pre-assessment of SMEs that will contribute to the innovation investment projects better support. The implementation of role-based access control, automated workflows and full audit traceability further ensures accountability, data integrity and compliance with governance requirements.

The modular and configurable architecture of the tool allows adaptation to different initiatives, supports simultaneous project implementation and enables replication across regional ecosystems. As such, the Pre-Assessment Tool constitutes a core operational instrument within SustainX, strengthening structured SME innovation assessment and supporting evidence-based programme implementation.

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Project partners



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