



## **PARTECS 2.0 Preview**

**AN INTER-LANGUAGE, INTER-MEDIA,  
TWO-WAY COMMUNICATION PLATFORM  
FOR REMOTE DELIBERATION**

**Product Overview**

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## Introduction to PARTECS

ParTecs SRL - Participatory Technologies is an international software company with head-office in Rome (5), Italy and fully owned Research and Development facilities in Bangalore (22), India.

PARTECS, our flagship product, is a **software-based communication platform for remote organising and deliberation**. Its modules and services have been developed to solve mission-critical internal information and communication needs of large political organisations and public participation programs of provincial and regional governmental agencies.

**It enables members and officials of large multi-language political organisations to complement meetings, email, and telephone with effective participation in formal and informal organizational processes via web, e-mail, post, fax and telephone.**

It aims at managing hierarchical communities and enhancing communication patterns of bodies distributed across time and geography. It makes processes of organising and deliberation easier, faster, and cheaper; through intuitive usage and high configurability. It facilitates the translation of geographically-dispersed physical bodies into sustained and active remote communities.

The platform and each of its modules are developed through the extension, customisation and integration of existing FLOSS (Free/Libre and Open Source Software) software applications. In particular, it extends several modules of the Zope web application framework. All software developed for the PARTECS platform is distributed under a license that permanently guarantees all its users freedom to access, distribution, and modification of the original and any modified version, starting 12 months after their first use. See the full text of Partecs License at: <http://www.partecs.com/ppl.html>

## Others' Solutions

Many large political organizations, to foster the efficiency and the effectiveness of their internal organisational processes, have been struggling to realize the potential of Information Communication Technologies.

In the recent past, all large political organisations have internally deployed new information and communication technologies: they maintain *websites* to publicize their initiatives, post news, share campaign material, and raise funds; they extensively use *email* to rapidly and inexpensively communicate, share information, and broadcast newsletters to their members; and they use the *Internet* to find information, news, and data.

Some have experimented or started implementing social networking systems (blogs, forums, chats, etc.) and organizing tools (event planning softwares, wikis) to increase the number and activity of their members. These tools however present the following disadvantages:

- Only users with access and the ability to use email or internet can participate;
- Users can interface only with same-language users;
- Difficulties in sorting and reading through large numbers of messages;
- Inability to build consensus and agreement except for in simple issues;
- Inevitable struggles around unclear moderation powers;
- Important authentication, security and privacy problems;
- Often lead to chaotic and pointless discussions;
- Often dominated by non-representative demographic groups.

These technologies have enabled remote members to communicate and share information. However, they have failed to envision and realize the promise of new telecommunication technologies: to enable the maintenance, creation, and expansion of effective and lasting democratic communities across time, space, and language, via remote communications.

## Features at a Glance

### NETWORKING

- Co-create and co-manage *Workgroups* or *Forums*
- Evolve discussion *Forums* into deliberative *Workgroups*
- Search partners and members by location, interest and profile

### CONSENSUS BUILDING

- General Consensus building
- Co-organize audio or live Meetings
- Self-Polling and Deliberative Polling™

### DELIBERATION

- Co-manage complex multi-Phase Drafting Processes
- Fine-grained configuration; manage templates of *Resolution* types
- Setups for majority, supermajority, and unanimous decisions
- Supports all preference conversions methods

### INFORMATION SHARING

- Share text, audio and video with peers
- Co-manage web-based *Libraries* of text, audio and video items
- Co-manage *Newsletters* in web, post, fax and email formats
- Co-manage personal or collective *Multimedia Blogs*

### ACTIONS

- Co-create and co-manage *Campaigns*
- Co-create and co-manage *Petitions*

### INTEGRATION WITH LIVE MEETINGS

- Co-decide place, time and agenda of live meetings
- Submit and Integrate transcripts: text, video and audio
- Start discussion before or continue deliberation after live meeting

### INTEGRATION WITH EMAIL

- Full participation offline, through any IMAP-enabled email client
- Internal Messaging* with sophisticated email forwarding

### INTEGRATION WITH TELEPHONE

- Submit preferences, drafts and comments via any telephone
- Co-decide time, date and agenda for audio-conferences

## The PARTECS Communication Platform

ParTecs has developed a **software-based communication platform that enables members and delegates of large multilingual political organisations to complement their synchronous email, telephone, and in-person communications, with asynchronous participation in critical organizational processes via Internet, email, postal services, telephone, and fax-in forms.**

Through its *Media Conversion Workflow Module* and its *Translation Workflow Module*, it **enables client organisations to bridge the digital and linguistic divides within their organisations, effectively and inexpensively.**

Our platform enables multiple bodies of large organisations to remotely maintain efficient, continuous, and intense access to deliberative organisational processes; thus ensuring decision-making processes that are faster, better, more informed, and based on a larger consensus. It enables economising in travel time, travel costs, and simultaneous translation costs by making live meetings more productive.

The platform is primarily made of highly configurable objects, **Group Areas, Newsletters, and Libraries**, which may be arranged in complex hierarchical and relationship-based architectures.

All modules, explained in detail in this brochure, share these common functionalities:

- **Multi-Language:** Users set a preferred interface language that applies to all media. Users also set languages that they are fluent with, so that messages are shown to them only in those languages.
- **Inter-Language:** Users speaking different languages can communicate effectively through the support of the integrated *Automated Translation Workflow Management*, which also optimises limited translation resources.
- **Multi-Media:** Users can submit any structured text items (drafts, news, amendments, etc.) via media of their choice: web, email, fax, telephone or regular mail. Apart from the web, users can choose to receive complete *Personalised Interactive Bulletins* (PIBs) through one, more or all media options.

- **Inter-Media:** Users can fully participate in deliberative processes and information exchanges, whatever the media they prefer or is available to them at a given moment. Our *Analog-2-Digital Conversion Module* ensures that users can fully participate via fax, post, email or telephone.
- **Highly configurable:** All modules, especially Discussion Areas, are highly configurable by non-technical administrators to adapt their configuration to communication preferences, as well as complex institutional architectures according to statutes and rules of procedures.
- **User Friendly:** All its different media interfaces have been designed with the support of the global leaders in web usability design, Human Factors International, so that interfaces of the different media are easy for users with very low experience and inclination towards interactive systems.

## ***Group Areas***

Group Areas are inter-media communication spaces where the remote deliberative processes of an organisation's bodies actually take place through a sequential structuring of conversations and discussions. The Groups are sophisticated, well-articulated, and highly configurable spaces supported effectively by inter-media and inter-language options. They contain ***Decision Items*** that can be chosen from templates and structured in various sequential phases.

In practice, authorised users, utilizing their choice of media and language, can do the following anytime and anywhere:

- View Decision Item drafts and amendments, and easily compare and visualize differences among versions;
- Submit *Decision Item* drafts, amendments to existing drafts, comments, petitions, endorsements and motions;
- Submit detailed proposals for: new Forums, new Groups, new Decision Items, Campaigns and Petitions;
- Express preference on all items.

Groups are designed to be easily adaptable to existing organisational decision-making rules, as reported in statutes, rules of procedures and regulations.

Each Group has members, possibly with varying access rights, as well as a Group Moderator(s) and a Group Coordinator. The Group is a space where a number of Decision Items are introduced to generate deliberation and ideation to build consensus or reach a decision. These may be created by the Coordinator, based on internal organisational obligations and internal political goals, to suit the most varied needs like co-drafting of budget plans; arranging for in-person meetings, audio conferences and events; initiating informal processes of data collection through petition campaigns; soliciting endorsements and polls; introducing policies and agendas; generating discussions; and reaching a consensus by ensuring visibility and voice to all the members.

For each Decision Item (DI), the Group Coordinator or his/her assistant may specify the detailed configuration of sequential deliberative phases. For each of these phases, s/he may define: preference expression methods; preference conversion parameters; permissions to submit, comment, express preference; enabled DI templates; expiration date; moderation rules; required quorum; required majority level; and more.

Groups may be used to collectively discuss and deliberate upon a wide variety of different matters public statements, live meeting plans, tele-conference plans, legislative proposals, statute changes, budget plans, strategic plans, agenda plans, and rules of procedures. Such versatility is accomplished through six basic **Decision Item Types**:

- *Simple Text*;
- *Structured Text*;
- *Text List*;
- *Budget List*;
- *In-Person-Meeting Plan*;
- *Tele-Meeting Plan (audio or video)*.

For each Decision Item Type, the Group Coordinator can maintain one or more customized templates according to group rules or personal preferences; S/he may or may not enable users to modify those templates while proposing new Decision Items.

One or more “Assistant Proxies” may be created by Group Coordinators or members to enable their personal secretaries to securely and accountably interact with the system on their behalf.



A “*Delegated Proxy*” functionality can be enabled or disabled by each Group Coordinator.

When enabled, any user can select a “Proxy”, or temporary representative, from a list of volunteers, for specific Decision Item types for which they feel they do not have the time, experience and/or skill required to participate adequately. The user can monitor a complete activity history of his/her proxy at all times, and s/he can transfer or revoke the assignment at any time. If required, the user can be set to retain the final say, allowing him/her to overwrite the choices of his proxy any time s/he considers it necessary.

## ***Newsletters and Libraries***

PARTECS enables the collective management of **Participatory Knowledge Bases (PKBs)**, which come in 2 different kinds: multimedia ***Newsletters*** or web-based ***Libraries***.

Both enable the collective creation and aggregation of useful bodies of information, and are highly integrated with discussion *Forums* and deliberative *Group Areas*.

***Newsletters*** are inter-media participatory content generation systems that enable single members, their delegates, readers, appointed editorial groups or open collectives, to *effectively* manage remotely, the content of each box of each edition.

Each box of each column of any Newsletter edition may be configured so that the content is determined through one or more the following methods:

- Individually by elected or appointed individual;
- Collectively by the majority of members of a group, appointed or elected;
- Collectively by informal working groups, self-selected, appointed or elected;
- Automatically generated by the elaboration of internal and external sources based on one or more of the following constraints:
  - Rating or ranking by a selected group;
  - Thematic area, temporal duration, geographic scope and other values.

***Libraries*** enable the collective categorization, tagging and prioritisation of submitted information items, in text, audio or video; as well as their conversion in widely accessible data

formats. Libraries offer many of the co-operative content management functionalities that are offered by Groups and Newsletters.

One of the most important part of any ideation process are the ephemeral thoughts produced by the participants in the process. Instead of defining knowledge from an authoritative position, *Participation Archives* recognise discussions, comments, submitted transcripts and other participant produced data as valuable knowledge, which needs to be archived and used effectively. With an easy archival process and intuitive usage, the *Participation Archives* would prove valuable to any organisation.

## ***Inter-Language Support***

**All modules of PARTECS support two-way communication among different languages, allowing users to participate effectively, using the language(s) they know.**

Considering the high cost of manual translations, and the current imperfect state of software-only translation systems, ParTecs SRL has developed an *Automated Translations Workflow Management* module that provides for an optimal allocation of limited available translation funds, through the automatic selection, dispatching, and management of translation jobs. The module allows for quick, timely, and relevant translation results within limited budgets.

The translation workflow is tightly and seamlessly integrated into Group Areas and Newsletter modules, effectively enabling users using different languages to cooperate effectively with each other.

In practice, all submitted text items are prioritised for one of three different translation quality levels, on the basis of one or more of the following parameters, maintained by the Group and PKB Coordinators:

- A fixed or maximum translations budget for each specific Group or Newsletter;
- Relevance and/or approval level assigned to each item through its direct rating by other users of the same language sub-group;
- Specific document types or specific authors that are set to automatically trigger a translation job of a given translation quality level.

In detail, the different translation quality levels entail:

1. **Professional Manual Translations:** Executed manually through a web form by a paid or unpaid internal *Professional Translator Group*, by an external professional translation service, by the author him/herself; and then checked by a member of a *Translation Quality Assurance Group*.
2. **Quick Manual Translation:** Members of the *Professional Translator Group* or the *Translation Quality Assurance Group* will provide for a quick check and correction of software-based translations.
3. **Automatic Software Translations:** Items will be processed and translated through a self-learning advanced software-based translation system.

Both the *Professional Translator Group* and the *Translation Quality Assurance Group* may be managed by the *ParTecs SRL Translation Management Service*, by the customer or by a third-party organisation.

The main administrator may decide how much the organisation wishes to spend every month on translation services for each Group or PKB space.

In addition, Group Decision Items can be configured so that the outcome of the deliberative discussion consists of multiple versions in different official languages.

## ***Inter-Media Support***

**Based on the availability of communication tools, personal inclination or ability, each user can participate effectively in Groups and Newsletters, via one or more of the following media: web, email, fax, telephones and regular paper mail.**

Non-web participation is enabled by ***Personal Interactive Bulletins (PIBs) (or Bulletins)***, which subscribing users receive via post, email and/or fax, on a weekly, monthly or tri-monthly basis. These contain the subscribed Newsletters and the most relevant documents of the subscribed Groups.

New users, during the registration process - via post, fax, email, telephone, or web - are asked to set their personal preferences, such as:

- Choice of one or more *receiving* media, with relative contact details for each, and frequency of reception of each fax, post and email *Bulletin*;
- Choice of one or more *submitting* media to enable, and relative contact details for each (for authentication purposes);
- Choice of Group Areas and Newsletters to include in each fax, email or post *Bulletin*;
- Choice of their preferred interface language, spoken languages, thematic areas of interest, geographical areas of interest, and more.

According to such preferences, users receive different fax, post, or email *Bulletins* on a weekly, monthly, or tri-monthly basis.

Through the *Interaction Forms* attached to email, fax, and post *Bulletins*, users can perform any of the functions available to web users, by checking the appropriate personalised check boxes and writing in special text input boxes with pen, pencil, or typewriter. Users may then periodically submit completed ***Interaction Forms***, via email, fax, or post.

Users can also use their fixed or mobile telephones to submit items or preference expression related to any of the items they receive in their *Bulletins*:

1. Initially, the user is identified through a combination of 2 or more of the following: the calling telephone number, a dialled permanent PIN number, a dialled *Bulletin*-specific PIN number, the user's own pre-recorded voice-print (optional);
2. By punching in 5-digits numbers, unique to each item on the *Bulletin*, they identify items to which they would like to interact;
3. By punching a single digit number, they can choose to comment, submit a draft, or express a preference;
4. They submit a comment or draft by recording a voice message. Alternatively, they express their preference by punching numbers on the keypad;
5. Voice recordings are transcribed by the *Media Conversion Workflow System* and introduced as regular PARTECS objects for all to view through other media.

PARTECS dispatches scanned *Interaction Forms* and *Telephone Submittals* to a *Media Conversion Team* and to *Media Conversion Quality Team*. These view and listen to the submittals and convert the contents to properly formatted data through simple web-based interfaces.

*Conversion Teams* are aided in their work by client-specific vocabularies and glossaries, continually maintained by the system of terms and nouns most used within the organization. Accuracy is ensured by the ability of users to correct each submittal when it is sent to them for confirmation in their next *Personal Interactive Bulletin*.

Through this tool, we can proudly say we **fully solve the digital divide within political organizations**, provided the organization is willing to bear the minor costs of inter-media conversion workflows.

## ***Representation Profile/Profiling of Representation***

It enables Group Coordinators to configure *Representativity Parameters*, such that Decision Items *democratically weigh* the preference expressions of each organisational representative according to their estimated democratic representativity and accountability credentials.

Through this optional functionality, PARTECS may be easily configured to enable networks, confederations, and loose federations to self-aggregate and self-manage their communication, decision-making and constituent processes, or to be coordinated in doing so by a reference “umbrella” organisation or local governmental agency.

## ***Internal Electronic Mail***

Each user has an *internal email address*, through which s/he can maintain intense and open communications with other users with no risk of overloading his/her personal electronic mailbox. Any user may configure his/her internal mail address, and forward certain messages to his/her personal or professional email address, on the basis of self-configured parameters and filters. These filters can be based on relationships with the sender, key words, message type, or other values.

## ***Security and Privacy Features***

Our platform is not (yet) meant to be used in user scenarios where security and privacy requirements are extreme, such as: voting for governmental elections or ratification of critical organizational decisions and elections.

Its purpose is to enable decisions on non-mission-critical matters and foster consensus on mission-critical matters. The latter are typically voted upon in subsequent traditional in-person ratification process.

Nonetheless, PARTECS can be configured by System Administrators for the preferred compromise of usability/accessibility and security/privacy. Users are identified through single or double factor authentication processes, which may include: permanent PIN number, temporary PIN number, fax or telephone number, mobile smart card authentication, IP address, postal mailing address, handwritten signature, *Interaction Form* barcodes, and voice-print authentication.

High levels of privacy for the expression of preferences may be provided whereby a trusted 3<sup>rd</sup> party-managed system may first perform the authentication of each user and then release a digital anonymous permission voucher, which hides completely the identity of the user.

## PARTECS Services and Solutions

### *Integration and Customisation Services*

ParTecs offers customisation, integration, deployment, hosting, development, data migration, training, support, and module extension services related to our current **PARTECS 1.6**, as well as our upcoming **PARTECS 2.0** software-based communication platform. This multi-modular platform is mainly built upon Zope, the most widespread software application server and development framework available today under FLOSS license. In addition, we also offer extensive integration services with other typical client systems, such as: LDAP, emails servers, knowledge management systems, mailings lists, member and donor management systems, and all major databases.

### *Fully-Hosted Solutions*

We plan to offer, in the near future, free trials and monthly subscription plans to small and medium organisations, completely managed by ParTecs, via our inter-media ParTecs Basic Hosted Services (PBHS). PBHS offers the basic functionalities of the PARTECS platform, and it requires no installation or technical knowledge by administrators and coordinators.

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