



MANUAL INTEGRATED MANAGEMENT SYSTEM

(Abstract) 2023

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ACRONYMS AND ABBREVIATIONS

BioBIP	Bioenergy and Business Incubator of Portalegre
BSC	Balanced Scorecard
CLiC	Language and Culture Centre of the Polytechnic of Portalegre
CEAQ	Strategic Council for Evaluation and Quality
C3i	Interdisciplinary Coordination for Research and Innovation
ESAE	School of Agrarian Studies- Elvas
ESECS	School of Education and Social Studies
ESS	School of Health
ESTG	School of Technology and Business Studies
FCT	Foundation for Science and Technology
GAQ	Office of Evaluation and Quality
GEE	Entrepreneurship and Employment Office
GMC	Continuous Improvement Group
MSIG	Integrated Management System Manual
NFC	Continuous Training Unit
SAS	Social Welfare Services
QUAR	Evaluation and Accountability Framework
MIS	Integrated Management System
UI	Research Unit
UO	Organic Unit

INTRODUCTION

1. The Polytechnic Institute of Portalegre is an institution of higher education that integrates organic units globally oriented to the pursuit, among others, of the same scope, of the following purposes:
 2. a) the training of pupils with a high level of quality in cultural, scientific, technical, artistic and professional aspects; b) carrying out research and applied research activities; c) the provision of services to the community;
 3. d) cultural, scientific and technical exchanges with national and foreign counterparts; e) participation in regional, national and international cooperation projects;
 4. f) Compliance with all the principles of the social responsibility management system and conciliation between professional, family and personal life;
5. For this purpose:
 6. Communicates to the various levels of the Institute the importance of fulfilling the legal requirements and the requirements of our clients (students);
 7. define a Policy for the Organization and its Objectives;
 8. promote the follow-up of objectives and periodic reviews of the Integrated Management System;
 9. ensure that the necessary resources are available;
 10. ensure that appropriate communication processes are established within the organisation;
 11. ensure that the processes necessary for the Integrated Management System are established, implemented and maintained;
 12. assess the performance of the System and any improvement needs;
 13. It ensures that the entire Institute is aware of the need to meet the requirements of clients (students).

14. The promulgation of the Integrated Management System Manual (MSIG) represents the President's written commitment that Policies are planned, executed and evaluated in order to ensure its continued applicability and suitability to our clients and to the evolution of the teaching needs.

2. STRUCTURE AND FRAMEWORK OF THE MANUAL

This manual describes the Integrated Management System (SIG) implemented at the Polytechnic of Portalegre and the means available to comply with its policies, being a reference document for the Institute and its stakeholders.

This version was approved in March 2020 and is available on the Institute's website.

3. CHARACTERIZATION OF THE INSTITUTE

3.1. DESCRIPTION

The Polytechnic of Portalegre integrates four Schools - Higher School of Education and Social Sciences (ESECS), Higher School of Technology and Management (ESTG), Higher School of Health (ESS), in Portalegre, and the Higher Agricultural School of Elvas (ESAE) - focused on education and training projects that ensure education, training, research and other activities in the respective scientific, pedagogical, technical and artistic scope.

It also integrates functional units to support the academic activity, research and innovation activity, management activity and services to the community. These are the Languages and Culture Centre (CLiC), the Communication and Image Office (GCI), the Entrepreneurship and Employment Office (GEE), the Research and Innovation Office (GII) and the International Relations Office (GRI).

Politécnico also integrates the Social Services (SAS), which include Food, Accommodation and Psycho-pedagogical Office and are also an organic unit of Politécnico.

The Services ensure permanent functions oriented towards technical or administrative support to IPP's activities and its several organic units.

The General Services include Academic Services, Procurement and Supply Services, Archive and Document Management Services, Auxiliary and Maintenance Services, Financial and Budget Management Services, Computing Services and Human Resources Services.

The Assessment and Quality Office (GAQ) is a technical support service to the Institute's quality management system.

The training offer of the Polytechnic of Portalegre covers diversified areas of knowledge, according to the training matrix of each of its schools. Education/training, social work, tourism, journalism/communication, management, engineering and technology, computing, design, marketing, agriculture, horse husbandry, nursing and health technologies are the fundamental areas of knowledge that sustain the training, research and intervention of the Polytechnic and its schools.

One of the main concerns of the Polytechnic of Portalegre is regional development, having a strong relationship with the surrounding community. On the other hand, it is concerned with accompanying the professional insertion of its students, creating the conditions for their settlement in the region. Despite this strong regional commitment, the Polytechnic does not neglect the exchange and national and international external relations.

In this sense, the Interdisciplinary Coordination of Research and Innovation, the Ongoing Training Centre, the Language and Culture Centre, the Entrepreneurship and Employment Office, the International Relations Office and the Europe Direct Office, are strong and consolidated bets of intervention units of the Polytechnic Institute of Portalegre. In 2015, the Polytechnic of Portalegre made a new commitment to BioBIP's active participation in the development of the region. BioBIP – Bioenergy and Business Incubator of Portalegre – is a structure of the Polytechnic dedicated to the incubation of companies and/or projects, essentially technology-based, related to the Institute's training areas, or to the use of the region's resources. The direction of BioBIP is ensured by the Office of Entrepreneurship and Employment of the Polytechnic of Portalegre, which is responsible for the global management of the structure's activities and all the material and human

resources attached to it.

Linking the areas of Entrepreneurship and Employment with Research and Innovation, BioBIP technology-based incubator has spaces for business incubation and a space for the production of bioenergy. This equipment also integrates the Circular Laboratory of Alentejo, in partnership with CCDRA, as well as the Energy and Climate Forum, and the Forest Support Laboratory, the AGIFR. In 2020 and 2021, BioBIP, through a new project, BioBIP2 TECH TRANSFER, will see its incubation space increased, as well as integrating other laboratories in the technological and digital areas to support the development of companies and to cross training-research- companies, and definitively bring teaching and learning closer together in this strategic triangle for the development of the Polytechnic and the region.

Since 2019, the Polytechnic has had a research unit accredited by the Foundation for Science and Technology (FCT). This unit - VALORIZA - is focused on the investigation and valorization of endogenous resources, assuming disadvantaged, low-density and cross-border territories, as a research field with specific characteristics, fitting in the institutional mission of a higher education institution polytechnic, with regional and cross-border implantation, as is the Polytechnic of Portalegre.

VALORIZA has privileged links to the socio-economic fabric of the surrounding region, through a close and involving approach of entities linked to the public and private sectors, with special emphasis on some companies operating in the region, consolidating a strong network of partnerships.

Its team of researchers, with different institutional affiliations to universities and polytechnics, brings together skills, recognized and scientifically validated, nationally and internationally, in multiple fields of knowledge (engineering and agronomy sciences, economics and management, social sciences, education and information technologies).

VALORIZA is organized, in an inter and transdisciplinary way, in a single research group, concentrating its main research focus in three thematic areas:

- (i) energy and waste recovery
- (ii) sustainable production and environment
- (ii) enhancement of low-density cross-border territories

Assuming itself as a UI strongly committed to the territory where its main management entity operates, it integrates a set of concerns, of a scientific and technological nature, namely: Food and Forestry, the Economy of Mineral, Natural and Environmental Resources, Critical Technologies and Energy, as well as the Social Economy.

In this context, the carrying out of projects and other dynamics of scientific research are particularly relevant, enhancing networking and cross-border cooperation, continuing a practice carried out by the respective research team. The participation and integration of the Polytechnic of Portalegre in the National Collaborative Laboratory for Biorefineries, COLAB BIOREF, together with other higher education institutions, research centers and companies, is a good example of this aspect.

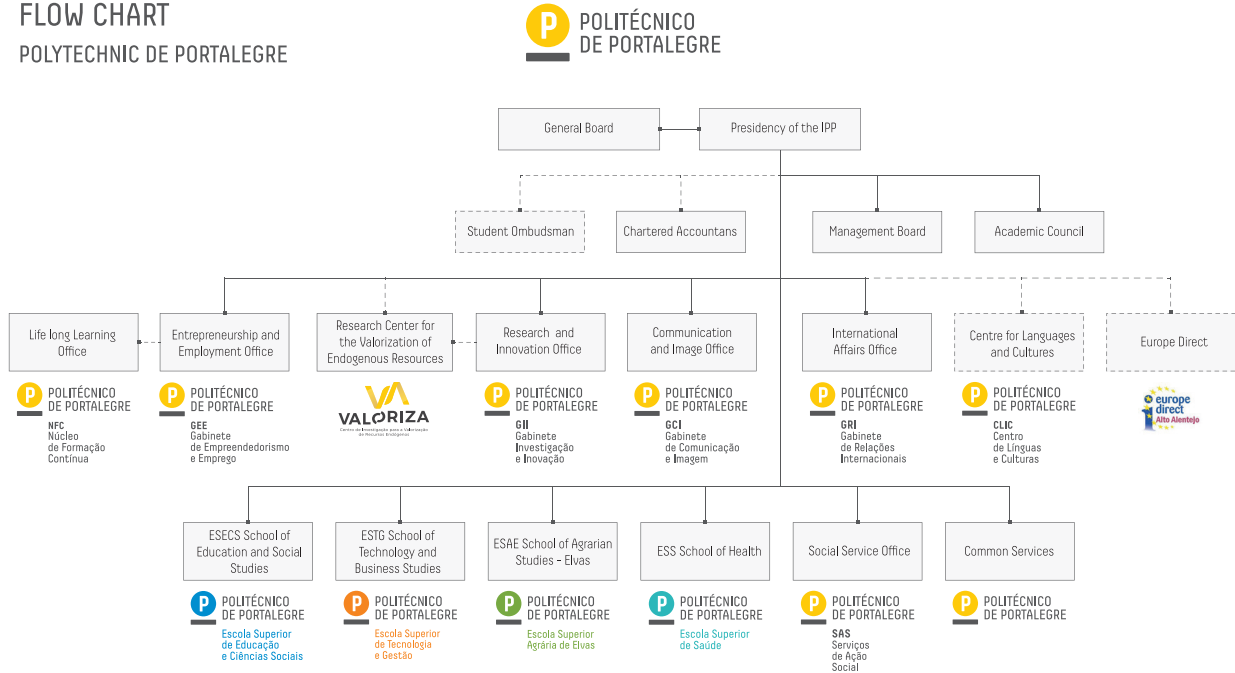
Social concern has been the Polytechnic's motto and bet since its foundation. The creation and deepening of social action services, the development of quality and excellent teaching, support for the school community, support for graduates in their insertion into active life and interaction with the surrounding environment are dominant concerns. But also social inclusion, the creation of conditions for the practice of sports, concern with the health and safety of students, teachers and employees are social practices of the Polytechnic of Portalegre that are institutionally asserting themselves.

Consistent with its concerns and principles, the Polytechnic of Portalegre is creating increasingly sustainable conditions to support the community, favoring the practice of volunteering by students and employees, as well as creating conditions to deal with internal situations of social emergency, namely by developing the Psychopedagogical Support Office, which has a wide range of work and intervention programmes.

Following the institutional progress that has already been made, the intention of achieving one more important step comes about in 2019, in a perspective of continued improvement, around the theme of conciliation of work, family and personal life. For this, the Polytechnic has incorporated the requirements of the NP 4552:2016 standard in its integrated management system, having been certified in February 2022.

3.2. Flow Chart

FLOW CHART POLYTECHNIC DE PORTALEGRE



3.3. Mission, vision and values

MISSION

The Polytechnic Institute of Portalegre is the Public Institution of Higher Education that creates, transmits and disseminates knowledge, professionally oriented, through training and qualification, of high level, for differentiated audiences, at various times in academic and professional life, and in research and technological development for the promotion of communities, in cooperation with regional, national and international entities.

VISION

A CLOSE AND COMMITTED POLYTECHNIC - that strives for the development of local answers to global challenges; that pushes for change which fosters public participation and citizenship; that creates conditions to guarantee equal opportunities for all; that promotes the sustainable development goals (SDGs), encouraging a collaborative management based on principles of rigour, transparency and merit recognition; that values creativity, innovation, entrepreneurship and scientific-pedagogical freedom; and that promotes health, wellness and respect towards the other, executing its mission with complete independence from the established authorities, whatever their origin, nature and form, valuing above all the people and institutional autonomy.

VALUES

The values of the Polytechnic Institute of Portalegre are:

Organizational excellence - Exceed the expectations of external stakeholders with high motivational standards of employees.

Ethics and transparency - Link of the employees of the Polytechnic of Portalegre to a conduct of rigor, zeal and transparency, stimulating dialogue and information sharing.

Subsidiarity - The Polytechnic of Portalegre believes in the capacity and autonomy of stakeholders,

both internal and external, to maintain social order and the common good, intervening only in their inability.

Stakeholder involvement and guidance - Work always and with stakeholders.

Sustainable development - Achieve in a balanced way the growth of the Portalegre Polytechnic and the well-being of the stakeholders, making a rational use of the available resources.

3.4. Principles of Quality and Social Responsibility and Conciliation

In defining its **Policy**, the Polytechnic of Portalegre assumes the principles of **Quality**

- Focus on the Client
- Leadership
- Commitment of people
- Process approach
- Improvement
- Evidence-based decision-making
- Management of relations

In defining its **Policy**, the Polytechnic of Portalegre assumes the following principles of Conciliation

- Equality and non-discrimination of any person;
- Conciliation of work organisation, taking into account family, personal and social needs of workers;
- Accountability for the actions and omissions of the organisation and its impact on stakeholders,

in the economy and in society;

- Transparency of policies, decisions and activities;
- Ethical Conduct based in values of honesty, equity and integrity to its workers, stakeholders and society in general;
- Respect, consider and answer to the interests of its stakeholders;

3.5. Policy of Quality, Social Responsibility and Conciliation

The Polytechnic of Portalegre, through its governing bodies and its academic community, undertakes to develop a policy of compliance with legal, regulatory and other requirements to which the Institute subscribes, with the involvement of interested parties, its different activities and management system, with the implementation of a dynamic process of continuous improvement in the development of its processes and activities, and with full respect for the principles of social responsibility and conciliation defining quality objectives and social responsibilities in response to the significant liability aspects identified, aiming at the satisfaction of its significant stakeholders.

In the development of the Social Responsibility policy, based on its Code of Ethics, the Polytechnic of Portalegre identified a number of concerns.

- Education of quality and excellence;
- Assistance of graduates entering working life;
- Social inclusion;
- Health;
- Support for the school community;
- Safety;
- Volunteer work;

- Sustainability of the job positions of employees;
- Support in crisis situations arising from social emergencies;
- Merit recognition;
- The practice of sports;
- Environmental impact;
- The interaction with the surrounding environment;
- The development of applied investigation;
- The valuation of the endogenous resources;

The answer to these concerns is reflected in the Social Responsibility programs, available on the website of the Polytechnic of Portalegre.

The stakeholders and the aspects of Social Responsibility are reviewed periodically after their definition, in accordance with the procedure established for the effect.

The Quality and Social Responsibility policy frames and supports the Strategic Multi-annual Development Plan.

Furthermore, we are committed to implementing a policy of conciliation between personal, family and work life, as condition for an effective equality between men and women, for wellness and for a sustainable standard of life for our employees. For this, we make the following commitments:

- To take steps towards the improvement of our workers well-being and standard of life, with a view of the conciliation of work, family and personal life of the employees;
- Guarantee the compliance with the principles and values of the Conciliation, assuming a commitment with the employees in three areas: good work practices, services and benefits, and

professional support and personal development;

3.6. Strategic Development Plan

The Strategic Multi-Annual Development Plan is set on several areas of intervention that materialise in diverse strategic objectives.

Each objective assumes the determination of actions that lead to its realisation. The performance of the polytechnic, guided by the defined strategy, is monitored and evaluated through the indicators associated to different actions, whose targets are previously defined by the Chairmanship of the Institute. The Strategic Development Plan is described in its specific document.

04.1 - Institutional identity: developing lines of action based on principles of transparency and democraticity that favour quality and excellence, considering an organizational model capable of meeting the requirements set out in the A3ES benchmarks for internal quality assurance systems.

04.2 - Valuing human resources: developing lines of action that take advantage of the installed capacity, promote the progression and enhancement of teaching and non-teaching staff.

04.3 - Infrastructure and equipment management: develop lines of action that taking advantage of the physical and patrimonial resources of the Polytechnic of Portalegre allow to enhance the valorization of infrastructures, assigning to the Polytechnic Campus a new centrality.

The objectives and strategic axes are described in a more developed way in the Strategic Development Plan of the Polytechnic of Portalegre [2018/2021], which includes the various actions, indicators and annual targets.

4. INTERNAL QUALITY ASSURANCE SYSTEM

4.1. Scope

The following was defined as the scope of the Quality Management System, the Social Responsibility System and the Conciliation between professional, family and personal life Management System:

“Training, research and scientific and technological development, community services and social services, in all organic units of the Polytechnic of Portalegre”.

4.2. Stakeholders

In the Quality, Social Responsibility and Conciliation Policy, the Polytechnic of Portalegre is committed to the satisfaction of its stakeholders. For this, it identified stakeholders as well as their needs and expectations, seeking to identify actions that meet those needs and expectations, with particular attention to significant Stakeholders, through various mechanisms of involvement. The stakeholders, their needs and expectations are regularly reviewed, according to proper procedures. The Polytechnic of Portalegre keeps a permanent list of its Stakeholders, as well as their associated needs and expectations.

4.3. System organisation

The Internal Quality Assurance System of the Polytechnic is part of an integrated management philosophy, which includes the quality management system, the social responsibility management system, the evaluation system of teaching and non-teaching workers, as well as the BSC - Balanced Scorecard methodology, thus forming an Integrated Management System (GIS).

The quality and social responsibility management systems are certified by ISO 9001:2015 and NP 4469:2019 standards, respectively. The quality assurance system was certified by the Agency for Assessment and Accreditation of Higher Education (A3ES). It is intended, in the short term, the certification of the conciliation management system by NP 4552:2016.

The current organisation of the MIS took into account the A3ES guidelines for internal quality assurance systems in higher education institutions, approved in October 2016.

The current review of the system also had as a guiding principle, the version of the statutes of the Polytechnic of Portalegre and its Schools, approved and implemented during the year 2016 and revised in 2021.

4.4. System management

The responsibility of ensuring quality, social responsibility and conciliation is not exclusive to those responsible for Top Management, but a privilege shared by all employees of the Polytechnic of Portalegre and the elements that develop activities in its name.

Management of the system is ensured by two structures: the Strategic Council for Evaluation and Quality (CEAQ) and the Office for Evaluation and Quality (GAQ).

The CEAQ consists of the President, the Vice-president of the Polytechnic of Portalegre, the Principals of the Schools, the Administrator of the Polytechnic and an element of the coordination of the GAQ. It also integrates an internal consultant, an external consultant and a student.

The GAQ is a service of the Polytechnic of Portalegre, provided for in its statutes, whose functions and competences are summarized as follows:

Collect and provide data for the development of the self-evaluation and external evaluation of the study cycles of the Polytechnic of Portalegre;

Permanently secure the reporting of information to the Higher Education Assessment and Accreditation Agency (A3ES) in regard to the accreditation of study cycles, the accreditation of the internal quality assurance system and institutional evaluation;

Regularly listen to the needs and levels of satisfaction of the stakeholders, as well as proceeding with the processing, analysis and disclosure of the respective results;

Operationalise the questionnaires that are to be applied to the different stakeholders which may be requested by the several structures and services of the Polytechnic of Portalegre;

Ensure the technical and operational support of the Integrated Management System (SIG) and guarantee the update of the system's document repository;

Ensure the integrated management and the continuous improvement of the SIG, as well as the interfaces with the structures in each Organic Unit, ensuring, simultaneously, the monitoring of the activities of the continuous improvement groups;

Keep track of and control the processing of occurrences, complaints and nonconformities;

Prepare and accompany the development of the audits program;

Guarantee the update of the indicators of the Strategic Map and the Evaluation and Accountability Framework (QUAR);

Ensure the availability and update of the information required by the Legal Framework of Higher Education Institutions and the European standards of quality;

Permanently ensure the report of information to the certifying entities of the ISO standards;

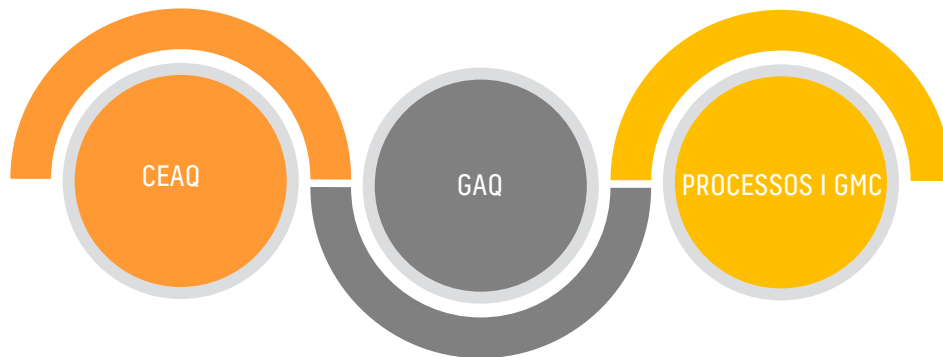
Oversee the compliance with the plan for the Prevention of Risks of Corruption and Related Infringements, ensuring the implementation of audits and the elaboration of annual reports.

The GAQ is coordinated by a head of division, who reports to the President of the Polytechnic of Portalegre.

All issues of day-to-day management of the SIG are discussed with the President who approves them and establishes the lines of action necessary to pursue the Quality Policy approved by the CEAQ.

The Strategic Council for Evaluation and Quality is generally responsible for:

- a) To collaborate with the Presidency in defining the Quality, Social Responsibility and Conciliation Policy of the Polytechnic of Portalegre.
- b) Articulate the Quality, Social Responsibility and Conciliation Policy with the organs and structures of the Polytechnic of Portalegre, Schools, Research Units and Functional Units
- c) Identify the external factors that influence the Polytechnic of Portalegre
- d) Identify the needs and expectations of the stakeholders of the Polytechnic of Portalegre
- e) Approve the organisation of the SIG and its revisions
- f) Appoint process members and managers of continuous improvement groups
- g) Coordinate the work of Management Review
- h) Evaluate the performance results of the system



4.5. Process approach

The process approach consists in the organization of work by functional areas, bringing together all workers, teachers and non-teachers, who, in different Organic Units (UO), perform the same functions. In this sense, to implement the Quality, Social Responsibility and Conciliation Policy, Continuous Improvement Groups (GMC) were established.

The GMC, which cover all the functional areas of the Institute, develop activities that promote the achievement of the objectives defined in the Strategic Development Plan, taking into account the A3ES benchmarks.

For the constitution of the GMC, the CEAQ invites an element from each of these areas to integrate a first-line group, bringing together representatives from the various areas that, by their nature, can best articulate themselves to, jointly meet the objectives set out in the A3ES benchmarks.

Whenever possible, the GMC of the nuclear processes should count on the participation of students.

The presence of the students is not mandatory for all moments of the group's activity. They must, however, be convened whenever the pending issues are directed towards their interests.

With this philosophy of constitution and management is ensured the participation of all UO and functional areas.

These working groups are the assurance of permanent improvement, in a balanced way, in all the Organic Units of the Institute, generating significant efficiency gains.

The groups meet periodically. Such groups are responsible for managing the process, for complying with the matrix, for analysing the reports of the Balanced Scorecard, with the indicators that concern them, and for proposing solutions to the management bodies to improve their services.

Each group establishes the modes of action (including responsible and scheduling) through Working Instructions.

Depending on the importance of the subjects, the continuous improvement groups propose to the Academic Council or the Management Board (depending on the nature of the subjects) the implementation of generic procedures, the implementation of which should apply to the whole Institute, established by Deliberations of those entities.

Each Group has a Coordinator (Process Manager), who, in addition to the functions inherent to all members of the Group, has the task of convening and logistically ensuring the functioning of the Group, as well as articulating with the GAQ, including the preparation of the annual Management Review document.

The identification of the processes and their articulation with the A3ES references is described in the following topic.

The Social Responsibility Management System and the Conciliation Management System are transversal to the whole Institution. Thus, the different continuous improvement groups incorporate in their objectives, activities and indicators, the principles of social responsibility assumed by the Institution and develop programs that enable or facilitate the objectives of Social Responsibility and Conciliation defined by the Polytechnic of Portalegre.

With regards to the conciliation management system, the evaluation and quality office and, naturally, the top management are of particular importance, for the implementation and management of conciliation programs and the process of resources management – where the human resources service is included.

4.6. System processes

The current system organization has been in force since April 2019 and integrates the following processes:

EDUCATION AND TRAINING

Objectives: to define procedures for the creation, approval and evaluation of the training offer; to promote the standardization of procedures and respective regulations applied to students, including those related to admission, progression, evaluation, recognition and certification, ensuring the conditions and support necessary for students to progress normally in their academic careers.

RESEARCH INNOVATION AND DEVELOPMENT

Objectives: to promote, value and evaluate R&D / Targeted research and high-level professional development; to promote inter-institutional and community collaboration.

INTERNATIONALIZATION

Objectives: to promote, keep track, evaluate and improve international cooperation activities

RESOURCE MANAGEMENT

Objectives: to establish mechanisms to plan, manage and improve services and material and human resources, with a view to the adequate development of students' learning and other scientific-pedagogical activities

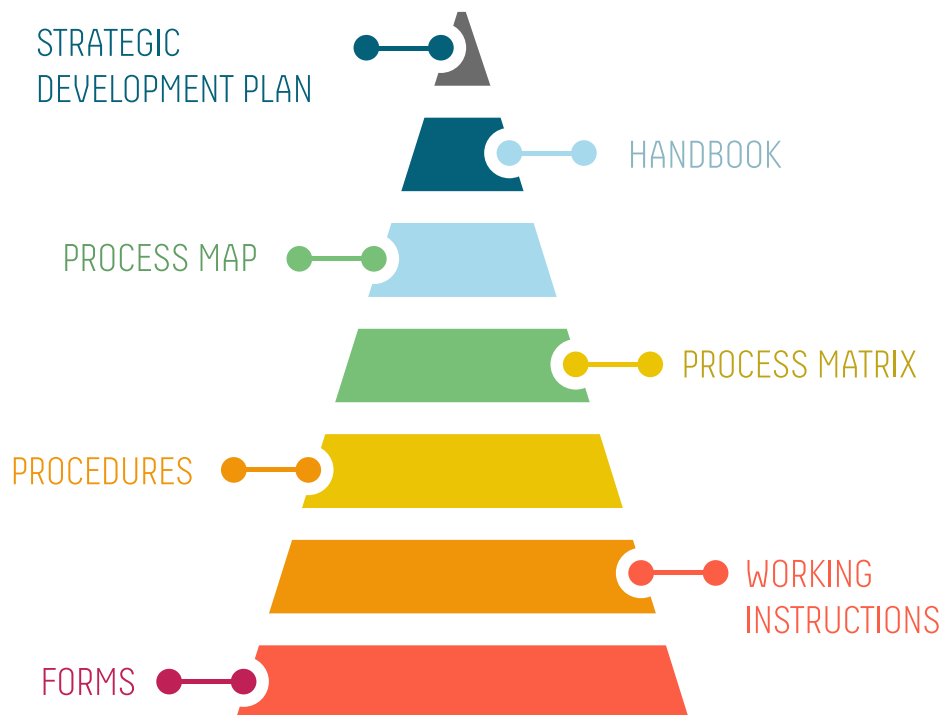
COMMUNICATION AND INFORMATION SYSTEMS

Objectives: to develop tools to ensure the collection, analysis and dissemination of information to the different stakeholders.

REFERENCES OF A3ES	CONTINUOUS IMPROVEMENT GROUP/SERVICES
Reference number (2) <i>Design and approval of the training offer</i>	EDUCATION AND TRAINING
Reference number (3) <i>Student-centred teaching, learning and evaluation</i>	
Reference number (4) <i>Student admission, progression, recognition and certification</i>	
Reference number (5) <i>Continuous monitoring and periodic review of courses</i>	
Reference number (6) <i>Research and development / Targeted research and high-level professional development</i>	RESEARCH, INNOVATION AND DEVELOPMENT
Reference number (7) <i>Interinstitutional collaboration and with the community</i>	
Reference number (8) <i>Internationalization</i>	INTERNATIONALIZATION
Reference number (9) <i>Human Resources</i>	RESOURCE MANAGEMENT
Frame of reference (11) <i>Information management</i>	COMMUNICATION AND INFORMATION SYSTEMS
Frame of reference (12) <i>Public information</i>	
Reference number (1) <i>Policy adoption for quality assurance and pursuit of quality objectives</i>	STRATEGIC ASSESSMENT AND QUALITY BOARD
Referential (13) <i>Cyclical character of external quality assurance</i>	

4.7. Document structure

The constituent documents of the Integrated Management System are organised as follows:



CULTURAL AND SPORTS SCIENCE EDUCATIONAL PROJECT

Document that defines the technical-scientific fields of action, based on the requirements of the region, with the identification, for each of the technical-scientific fields, of four dimensions: training offer, research, community intervention and partnerships.

STRATEGIC DEVELOPMENT PLAN

Four-year document establishing the objectives and indicators determined to address the Policy defined in the Institution.

HANDBOOK

Guiding document of the system organization.

PROCESS MAP

A guidance document for the system establishing relationships between processes and bodies of the Institute to ensure that the objectives set out in the Strategic Development Plan are met (Annex 5.2 in the full version of the Manual).

PROCESS MATRIX

The continuous improvement groups lead their activities according to what is defined in the respective process matrix. This document identifies the objectives and indicators of the GMC, the activities carried out to achieve the defined objectives, detailing the stakeholders for each of the activities, as well as related information/documentation for the inputs and outputs, support the start and end of the activity, respectively (Annex 5.3 in the full version of the Manual).

PROCEDURES:

With the implementation of the Integrated Management System, several procedures have been established to regulate the execution of tasks of general scope, the application of which relates to the whole Institute. The procedures are periodically reviewed by the GAQ, to ensure the maintenance of its adequacy. Whenever necessary, the procedures are corrected/adapted to the practices considered convenient for the assurance of the maintenance of the integrated management system.

By initiative of the management of the system, procedures may be created and/or eliminated.

The GAQ will permanently disclose, on the PAE platform, all applicable procedures, publishing the alterations that occurred to all of the Polytechnic of Portalegre.

WORKING INSTRUCTIONS

Each group establishes the modes of action, where determines the tasks, responsible and schedule through Work Instructions. The working instructions shall be verified by the QA and approved by the Management Board. After approval, they will be made available in the PAE, in the group folder.

FORMS

All forms, documents and records are checked in accordance with Procedure 5.

All system documentation is available on the PAE platform.

4.8. Monitoring, evaluation and continuous improvement

4.8.1. Instruments

QUAR

Since the Strategic Development Plan is a document that reflects a multi-annual programme, there is, however, another management and planning instrument that defines for the Polytechnic of Portalegre the objectives to be achieved annually. This instrument is the Evaluation and Accountability Framework (QUAR), under the SIADAP, approved by the Coordinating Council of the Evaluation of the Institute.

Elaborated the QUAR, based on this instrument, each Continuous Improvement Group defines the objectives associated with the respective processes of the Quality Management System, available in the process matrices.

INDICATORS

The performance evaluation of Continuous Improvement Groups is done through indicators. Their determination and continuation shall be carried out at defined intervals with the aim of quantifying and thereby continuously improving their efficiency and effectiveness.

The Strategic Council for Evaluation and Quality, through the Office for Evaluation and Quality, ensures the continuous monitoring of the performance of the different processes.

Where the indicators do not reach the targets previously defined, action plans shall be drawn up with a view to correcting the deviations recorded.

The summary of the indicator map is given in Annex 5.4 (full version of the Manual).

PERFORMANCE ASSESSMENT

Each Continuous Improvement Group establishes its own monitoring and self-assessment mechanisms, according to its activities.

Compilation of these instruments is available in Annex 5.7 (full version of the Manual)

BALANCED SCORECARD

In the construction of the Balanced Scorecard, the original methodology of the model, by Kaplan and Norton, was followed, consisting of the four perspectives - financial, client, internal processes, learning and growth.

In each perspective, the corresponding objectives and indicators, previously defined in the Strategic Development Plan, were identified.

STRATEGIC MAP

The strategic map makes it possible to identify the determinant cause-effect link in the organization, which is transversal to all perspectives, requiring special attention in monitoring the results obtained in the various

indicators.

Through the analysis of the Strategic Map, the Management Board establishes corrective action plans for deviations from the targets set.

MANAGEMENT REVIEW

Every year, during the months of December and January, the CEAQ carries out a critical analysis of the Integrated Management System, referring the preliminary report to the top management which is subsequently presented in an extended session of the Academic Council of the Polytechnic of Portalegre, with the presence of executives and representatives of organs and structures, non-teaching staff and students. At this meeting, a reflection is made, resulting in conclusions which are then considered in the final document of the review by management.

This report aims to assess the performance and results of each year. It results from the contributions of the Continuous Improvement Groups and is then completed, harmonised and discussed in the CEAQ.

Decisions shall contribute to the preparation of the forward documents for the following year.

SATISFACTION ASSESSMENT

Each year, the QA shall consult the Stakeholders to determine their level of satisfaction. The reports produced shall be referred to the Management Board, which shall evaluate them and shall define a corrective action plan for the least achieved results.

In addition to these instruments, which are widely applied throughout the Institute, the Continuous Improvement Groups develop and implement their own instruments, identified in Annex 5.7. (Full Version of the Manual).

AUDITS

Each year the system is subject to internal and external audits. An external audit by the certifying body and an internal audit under the responsibility of the GAQ are part of the annual programme.

The GAQ is also responsible for organizing the internal audit of the study cycles, which in each school year will be evaluated by A3ES. This audit takes place in the calendar year preceding the A3ES audit.

Each year an audit of the Plan for the Prevention of Corruption, Risks of Corruption and Related Infractions, ensured by the GAQ, as well as the internal control system in the financial and human resources area, under the responsibility of the Single Tax.

4.8.2. Responsibilities

The performance of the system shall be planned and assessed at various levels:

STAKEHOLDERS	RESPONSABILIDADES NO SISTEMA
Chairmanship	Defines Policy Sets strategic objectives and indicators in the Strategic Development Plan
Academic Council	Sends out opinions on results and annual action plans Sends out opinions on academic procedures
Management Board	Analyses the results and establishes action plans
CEAQ	Establishes guidelines for the system Elaborates the Management Review
GAQ	Ensures the functioning of the system: definition of models and system tools; implementation of monitoring mechanisms (audits and satisfaction assessment); articulation between the GMC and CEAQ
GMC	Defines objectives according to the DPE Create working instructions to support your activity Establish mechanisms for self-assessment

4.9. Information system

In the Polytechnic of Portalegre there are several platforms/ information systems: SIGES, for academic management; Spring for the management of accounting information, financial and human resources management; Cognos, for the management of indicators of the whole system; edoclink for document management; PAE - Enterprise Architecture Platform of the Polytechnic of Portalegre - as a platform for information management, integrating the various systems used in the Institution, in addition to various monitoring and management functionalities of the Institution's various areas of activity.

In order to store, preserve, disseminate and give access to the intellectual production of the Polytechnic (articles published, communications accepted and published in conferences, theses and dissertations approved) in digital format, the common repository is used, indexed by the RCAAP portal.

Information management in libraries is done using PRISMA software.

In order to make information available to the community, which is collected in the various existing information systems, the PAE system is a key element, since it facilitates the connection between the various systems, to improve the effectiveness of decision-making with a view to continuous improvement, allowing for the analysis of results and reasoned decision-making on the main activities in the Institution.

The following are some functionalities of the systems that, due to the functions they provide, are used by all teaching and non-teaching collaborators: PAE and EDOC

PAE-IPP (POLYTECHNIC DE PORTALEGRE ENTERPRISE ARCHITECTURE PLATFORM)

The technological base of the PAE is composed in its entirety by free software and the development of the system was fully conceived by Human Resources of the Polytechnic of Portalegre. From an early age this platform proved to be able to overcome all the needs of integration of the numerous information, processing and document management systems of the Polytechnic, which is why it has become the central base of many of the processes that the Polytechnic has today, and that are mostly digital processing.

The PAE System has been designed and designed, since its inception, to be a centralized system accessible

on the Web and on the mobile devices of the community, aiming to support the processes integrated and designed to standardise working methods and access to information at the Polytechnic Institute of Portalegre.

All improvement processes are part of the SAP development process. The problems are analyzed from a global perspective, ensuring that they allow maximum automation and re-use, from a service development perspective, with a solid and systemic basis. An example of this systemic development was the adoption of practices for producing evaluation reports of the courses, teachers, among others, generated automatically, based on academic information produced during the year. This functionality facilitates the work of information analysis by the teaching staff and scientific-pedagogical bodies, aiming at improving the teaching - learning process. Another example of this is the CLOUD Ippdrive, which has been specially developed to be the basis of all the information that exists in the form of files. The PAE is also one of the major gains in supporting distance lessons. The integration of the PAE with the distance learning systems of the FCCN, since its inception, has in fact been an excellent way of adapting to the methodologies and tools of distance learning, which, although not embedded in the platform, are an extension of the platform, This allows teachers and students an extraordinary ease in scheduling synchronous classes as well as the availability of asynchronous sessions, videos and offline content through their CLOUD Ippdrive.

the fact that the SAP has been progressively used over the last few years as a means of communication between teachers and students and vice versa, considering the ease of use of any kind of documentation through the CLOUD Ippdrive, whether in the placement of advertisements and other information which, in addition to being available on the platform, are also the subject of notification to the interested community at the same time as they are made available, it facilitated the transition to distance learning in a preponderant way.

having regard to the excellent response of this platform to the needs arising from the new methodologies of distance learning, new features have been developed, such as the chat for direct communication between users of the platform, the online assessment test module, and the voting module for collegiate meetings. In the PAE are available several modules to support the management and monitoring of continuous improvement processes: construction, approval and updating of curricular unit sheets; management of the pedagogical technical dossiers of curricular units; monitoring and system management of suggestions, concerns, occurrences and complaints (Helpdesk); document repository of quality management system and social responsibility; regulatory repository and legislation supporting the various areas of work; management of educational assessment questionnaires of the Curricular Units, by students; management of consents and access profiles, in accordance with the General Data Protection Regulation, among others.

EDOC - DOCUMENT MANAGEMENT SOFTWARE AND ONE-STOP SHOP FOR EDUCATION

The edoc platform - Document Management Software and One-Stop Desk for Education - is a platform to support the dematerialization of procedures, integrating, among others, the following applications and modules: document management, which will provide both document management and document repository functions; digital and digitised signature features via electronic certificates or Citizen Card; "One-Stop Shop" support platform providing online services/forms integrated with Document Management; support platform for Dematerialised Meetings Management; drafting documents in numbered process format.

This solution allows the dematerialisation of processes with the consequent decrease of the paper circulation; make available a single, centralized repository of digital document archiving; make available a centralized document archiving/repository mechanism, as well as ensuring fast access and effective access control over all information circulating within the Polytechnic; Implement a Single Counter platform (online, anywhere and at any time) in order to provide all its regular services to students, candidates, teachers, former students and the general public.

