

GRACE

Grants
Administration
and Collaboration
Environment

Bilateral Fund Work plan

GrACE User Manual for National Focal Point

Version 1.1, July 2025

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Introduction

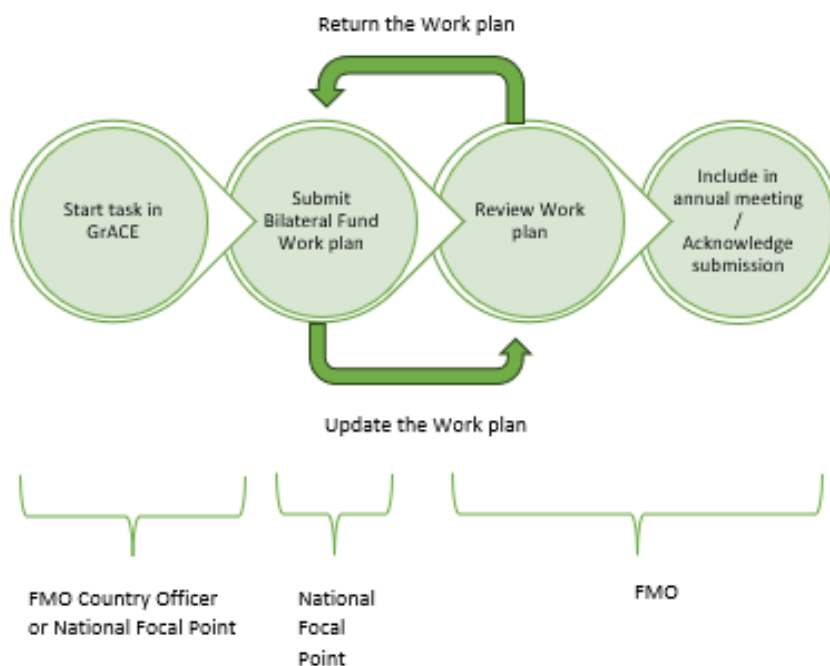
GrACE stands for Grants Administration and Collaboration Environment. The system supports the management of the EEA and Norwegian Financial Mechanisms 2021-2028. GrACE is used by the Donor and Beneficiary State entities and the Financial Mechanism Office (FMO). Users access GrACE through the website <https://grace.eeagrants.org/>.

The National Focal Point (NFP) prepares the Bilateral Fund (BF) Work plan. It describes the proposed activities to be implemented under the Fund for Bilateral Relations for the duration of the fund and in consultation with the Donors. The Joint Committee for the Bilateral Fund (JCBF) then defines the Work plan and the NFP updates it at least once per year.

For further help and support, please contact grace.support@efta.int. You can find this user manual and other manuals on our website <https://eeagrants.org/gracemanuals>. Be sure to regularly check for updated versions.

1. Bilateral Fund Work plan in GrACE

The following represents the Bilateral Fund Work plan workflow in GrACE. The workflow is started by the NFP; the Country Officer can also start it if needed. Both parties can find the task in their dashboard. According to the regulations¹, the initial draft of the workplan should be submitted at least 4 weeks prior to the first meeting of the Joint Committee. When the NFP has submitted the Work plan in GrACE, the FMO Country Officer reviews it.



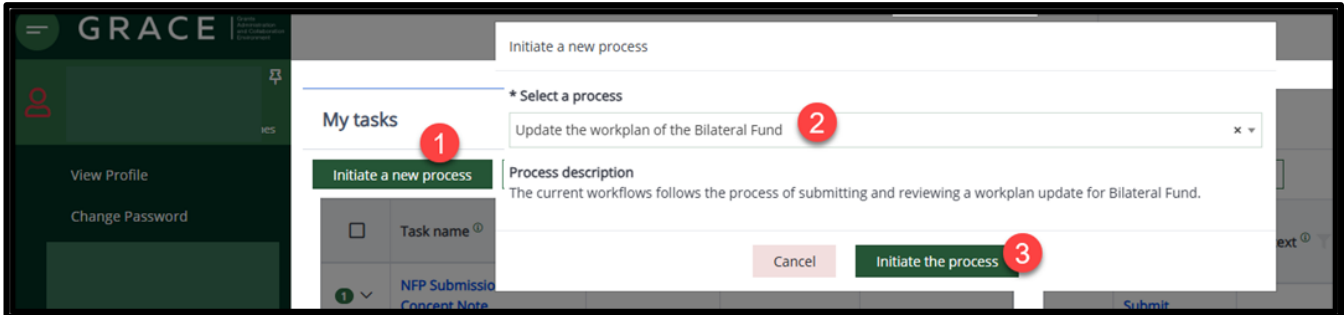
The NFP prepares the Work plan for the Bilateral Fund in consultation with the JCBF and submits it to the FMO through GrACE.

The FMO may return the Work plan to the NFP with comments. The NFP will then make any necessary changes and re-submit the Work plan to the FMO. The FMO reviews the plan once more and then validates the final version in GrACE. Upon the initial submission of the plan, when the Work plan has passed the review successfully, FMO will add it to the annual meeting portfolio. At a later stage if the plan is updated, FMO will acknowledge the submission after review.

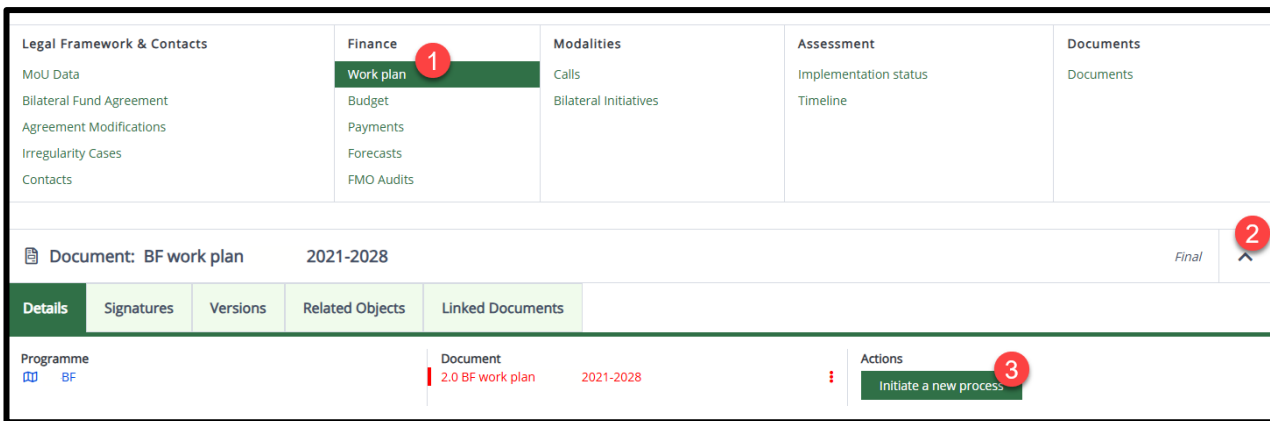
¹ Article 2.6 «Work plan», <https://eeagrants.org/resources/regulation-implementation-eea-grants-including-annexes-2021-2028>

2. Start the Bilateral Fund Work plan workflow

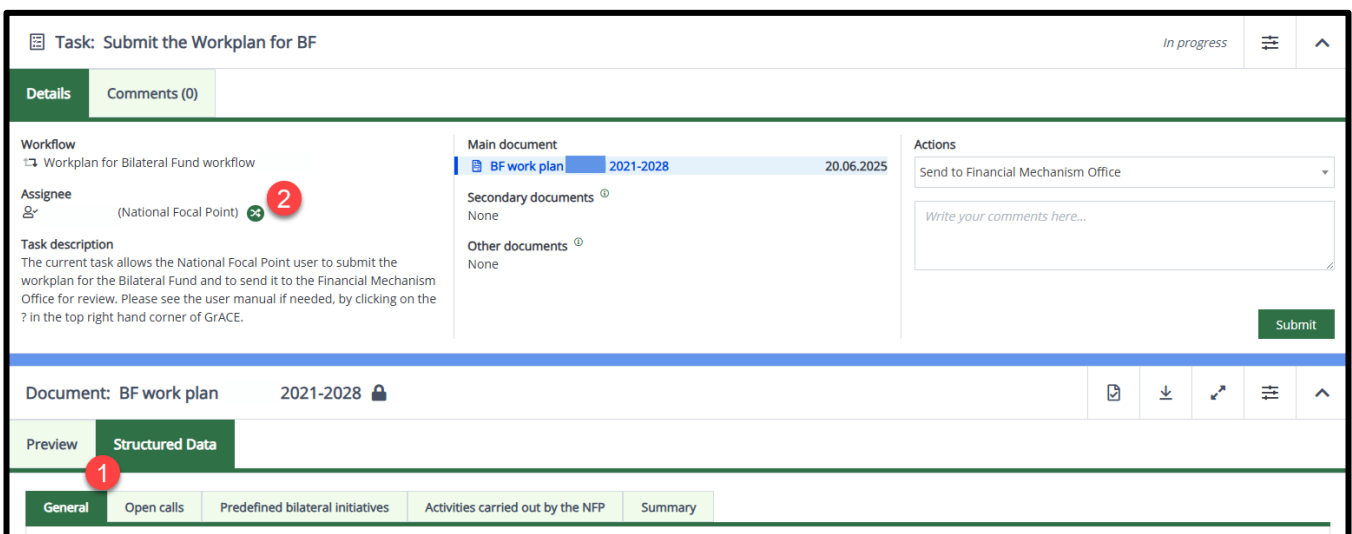
To start the workflow for the Bilateral Fund Work plan, click on 'Initiate a new process' under My tasks on your dashboard (1). Select 'Update the Work plan of the Bilateral Fund' (2) and click on **Initiate the process** (3).



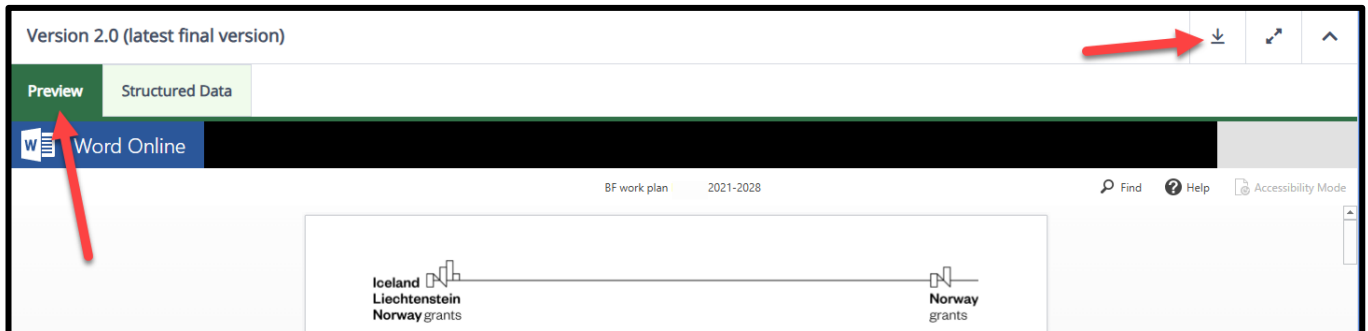
This task can also be started when looking at the current work plan (1. You might need to expand the *Document* properties by clicking on the arrow (2) and then you will see the option to **Initiate a new process** (3).



A task page will appear once the process is initiated. To navigate through the different sections, click on the different titles under the *Structured Data* tab (1). Register the relevant data and information as needed. To reassign the task to a colleague, you can click on the green button next to your name (2) and assign it to someone else.



You can view a printable version of the Work plan that GrACE creates by clicking on the *Preview* tab. This document contains information currently registered under the *Structured Data* tab. You can also download the document by clicking on the download arrow in the right-hand corner.



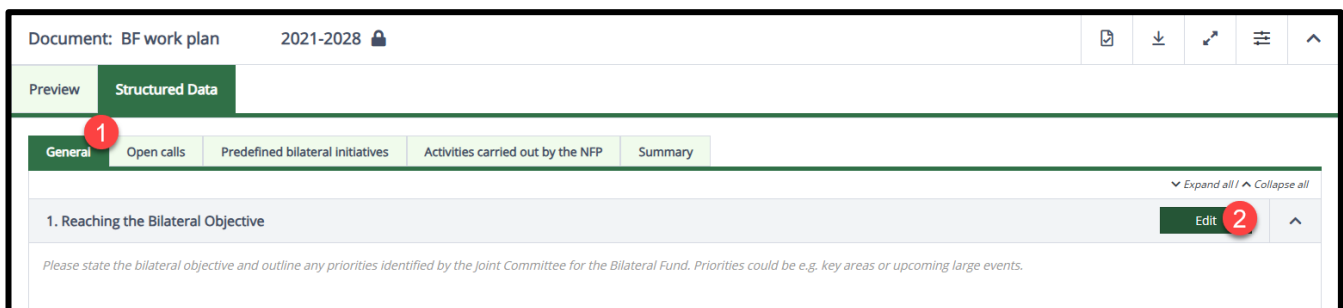
Until you press **Submit**, you have the possibility to **Edit/Update/Save** the information registered, as many times as necessary. The Work plan is not submitted to the FMO Until you submit the workplan and the task disappears from your Dashboard (the first page) in GrACE.

3. Fill in the Work plan

The Structured Data tab is composed of five tabs in which you will register the changes in the Work plan, in line with the template in Chapter 3:

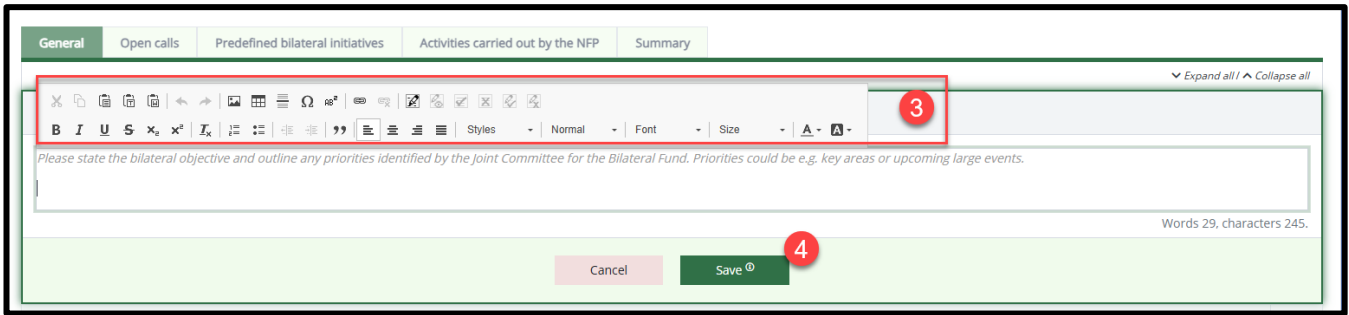
- General
- Open Calls
- Predefined bilateral initiatives
- Activities carried out by the NFP
- Summary

The *General* tab (1) contains text boxes for the first three sections of the Work plan: *Objective and priorities*, *Implementation system*, and *Donor shares and Donor priorities*. To enter data into these sections, click **Edit** on each section (2).

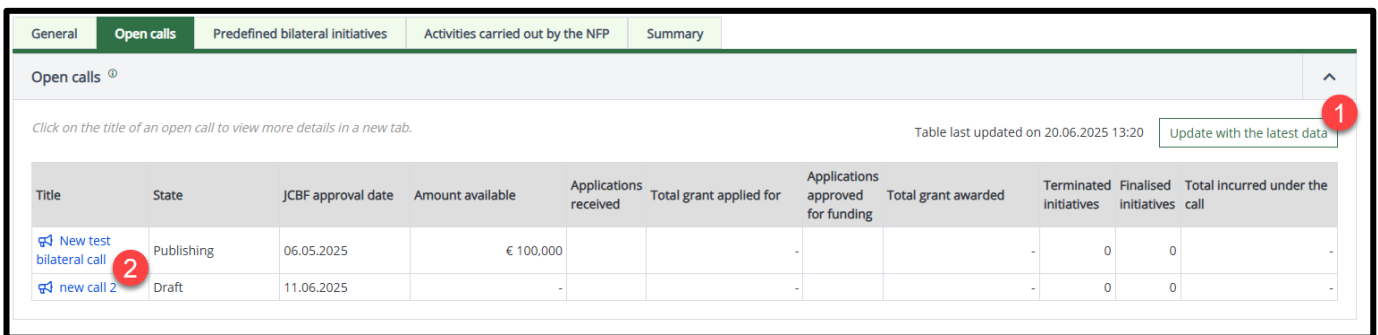


After you click **Edit**, the text editor opens. You can then type in or paste the formatted text in the field. You can also use the word processing bar to further format the text (3).

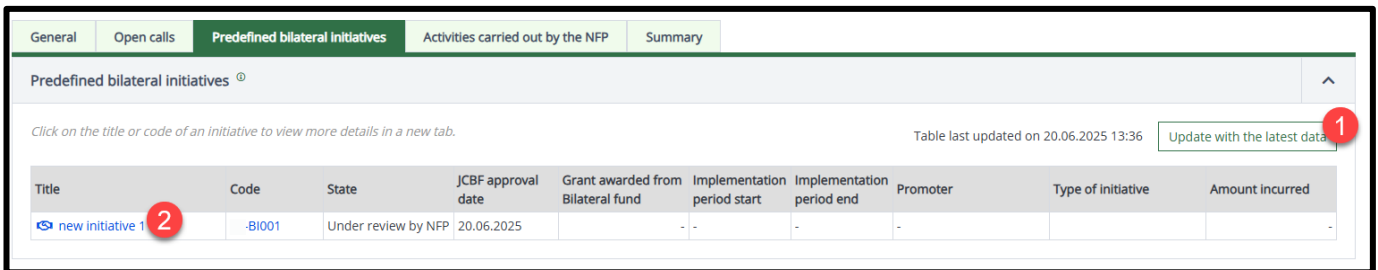
The field will automatically resize according to the amount of text. Clicking **Save** (4) for each section edited will save the data and exit the edit mode.



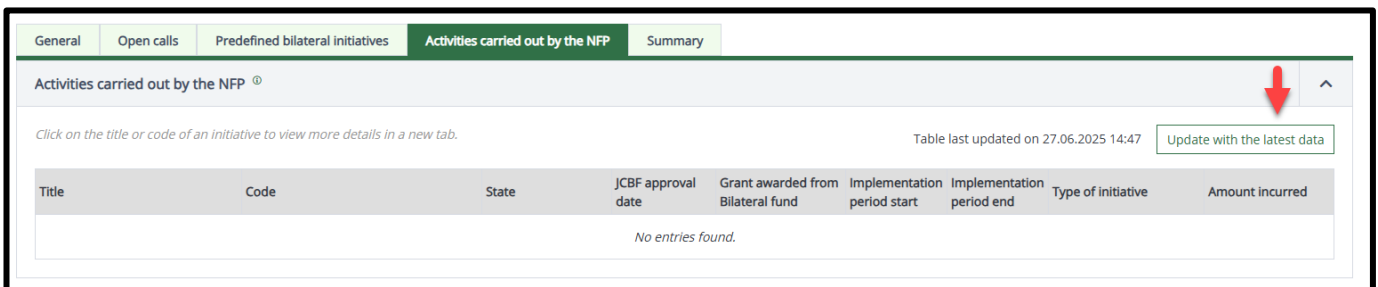
The *Open calls* tab includes a table with current calls and a button to update the list with the latest data from the individual entries in GrACE of initiatives selected further to calls (1). Click on the title of an open call to view more details in a new tab in your browser (2), it will take you to the page of the call itself.



The same can be done with the *Predefined bilateral initiatives* tab. Here you will see predefined initiatives where the NFP is not the promoter:



The tab *Activities carried out by the NFP* has the same setup. This tab contains a table with predefined initiatives where the NFP is the promoter. In the top right corner, there is a button to update the content with the latest data, which will be pulled in from the predefined Bilateral Initiatives registered at national level.



In the *Summary* tab, there is a table showing a summary of the previous tabs, with their budgets. The NFP can add comments in the Comments column. This table will be updated if any data in the other tabs are updated. The budget amounts are carried over from the corresponding tabs, and hence not possible to change in this view. You can add or change comments by clicking on **Edit (1)** in the upper right-hand corner, then editing a comment (2) and clicking **Save (3)**.

| Title | Budget | Comments |
|--|---------------------|----------|
| Activities carried out by the NFP | € 0 | |
| New test bilateral call | € 100,000 | |
| new call 2 | - | |
| Pre-defined activities (total budget for planned pre-defined activities at national level) | € 0 | |
| Funds still to be allocated | € 11,600,888 | |
| Total | € 11,700,888 | |

4. Submit the Work plan

After finalising the registration of information in all *Structured Data* tabs, select **Send to Financial Mechanism Office (1)** and then click **Submit (2)**. The system will notify you in case there are empty textboxes. If this is the case, then you must fill them in before submitting the Work plan. Optionally, you can leave a comment for FMO.

Details | Comments (0)

Workflow
Update workplan for Bilateral Fund workflow

Assignee
(National Focal Point)

Task description
The current task allows the National Focal Point user to submit the workplan for the Bilateral Fund and to send it to the Financial Mechanism Office for review. Please see the user manual if needed, by clicking on the ? in the top right hand corner of GrACE.

Main document
BF work plan 2021-2028 20.06.2025

Secondary documents
None

Other documents
None

Actions (1)
Send to Financial Mechanism Office

Write your comments here...

Submit (2)

The FMO Country Officer will receive a task to Review Work plan submission.

5. Update the Work plan further to FMO comments

In case further changes are needed, the FMO Country Officer will return the *Update Work plan for Bilateral Fund* task to the NFP. Accordingly, you will receive a notification by email and a task to update the work plan, in GrACE.

In the task details, you can access the document with comments from FMO (if any) in the section “Secondary documents” (1) – or it might be that the feedback was left as Comments, in that case please find them in the “Comments” (2) tab:

You can now edit the Work plan as shown above in 3 Fill in the Work plan. When ready, you can submit the Work plan to FMO once more.

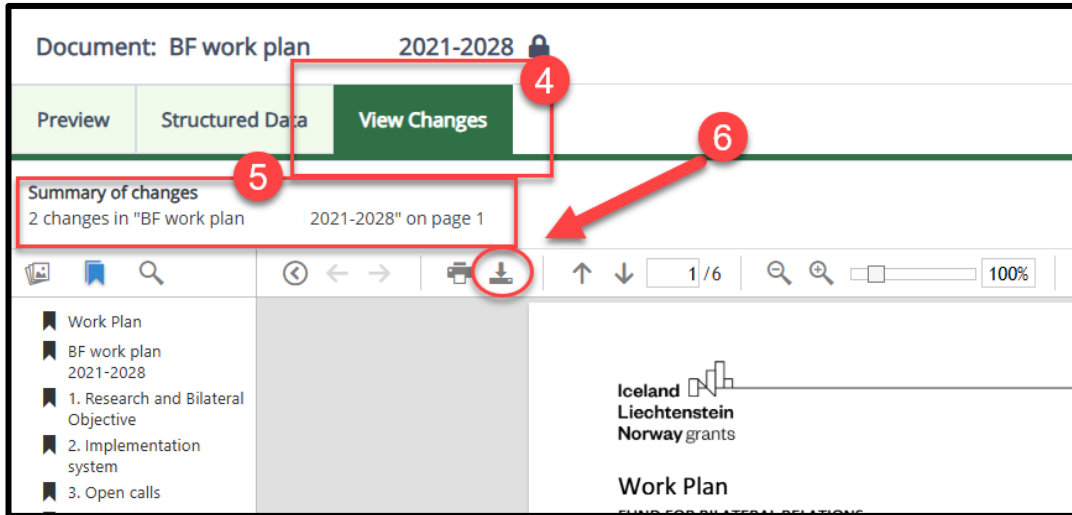
6. Updating the Work plan at a later stage

To update a Work plan that has already been submitted and approved by the FMO, further to a decision by the JCBF to amend the Work plan (e.g. to include new initiatives or modify priorities), the NFP can initiate the workflow itself.

You will find this option from your Dashboard when you first log into GrACE. Start the workflow by clicking **Initiate a new process** (1) and then select “Update the Work plan of the Bilateral Fund” (2). Click **Initiate the process** (3) to start it.

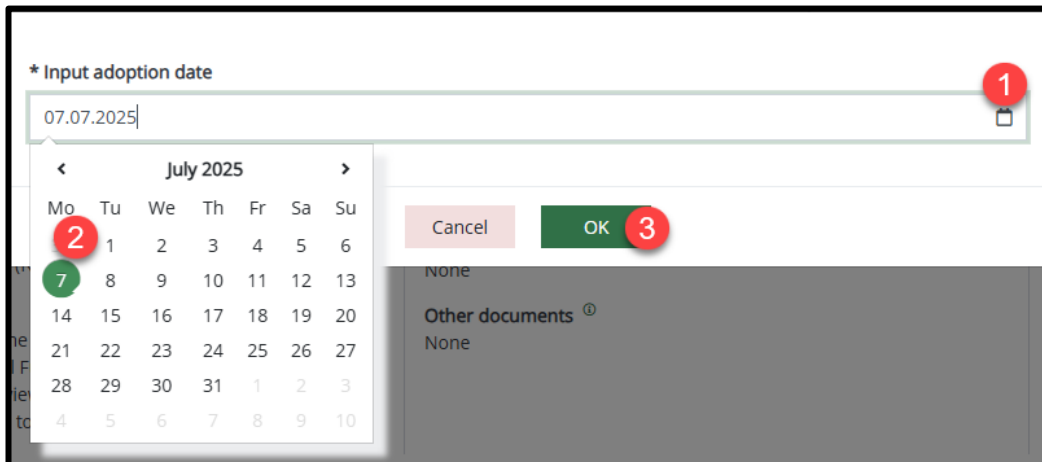
The new workflow will start, and you will once more find the task for submitting the Work plan on your dashboard as explained in the previous chapters of this user manual.

Inside the task of the update workflow, you can see the *View Changes* (4) tab. This tab will show the number of changes and on which page they were made (5) by comparing the previously submitted Work plan with the new edits. You can download this comparison document by clicking on the download icon (6) on the menu right above the document, this document can be viewed in Word showing the changes between the versions.



When the updated Work plan is ready to be submitted, submit as explained in *Submit the Work plan*.

When you submit you will be asked at what date the Work plan was adopted by the JCBF. Select the icon for the calendar (1), select the adoption date (2) and click on **OK** (3). It will now be submitted to the FMO.



7. View the Work plan

The final Work plan can be viewed under the Finance section on the Bilateral Fund programme page (1). The latest version can either be previewed in GrACE or downloaded as a Word document or PDF by clicking on the **Download** button in the right-hand corner (2).

The screenshot shows a navigation menu with five main sections: Legal Framework & Contacts, Finance, Modalities, Assessment, and Documents. The 'Finance' section is expanded, and 'Work plan' is highlighted with a red circle and the number 1. In the top right corner of the document area, there is a download icon (a downward arrow) with a red circle and the number 2 next to it, and a red arrow pointing to it.

To access older versions of the Work plan and/or to compare the latest version, first click the 'Work plan' (1) item in the menu. Then click the down-facing arrow (2) of in the right-hand corner of the document, to open the menu with options for the document.

The screenshot shows the document header 'Document: BF work plan 2021-2028' with a 'Final' status and a down-facing arrow icon (2) in the top right corner. Below the header, there are five tabs: Details, Signatures, Versions, Related Objects, and Linked Documents. The 'Versions' tab is selected and highlighted with a red circle and the number 3.

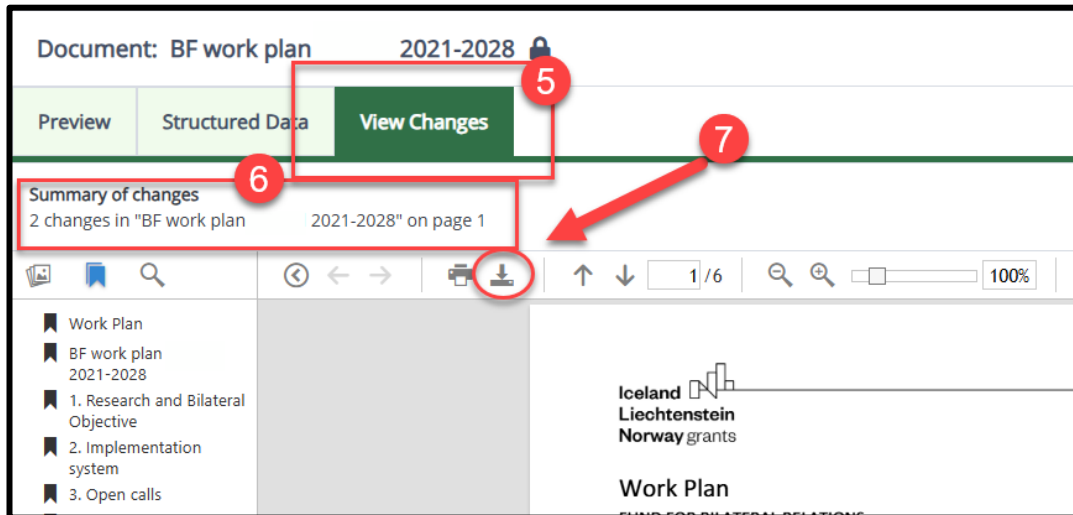
Under the *Versions* tab (3), tick the checkboxes of the versions you want to compare (4). Click on **Compare** to view the track changes merged into one document (5).

The screenshot shows the 'Versions' tab interface. At the top, there are buttons for 'Download', 'Print Preview', 'Revert to', and 'Compare' (5). Below these is a table of document versions. The first two rows have their checkboxes selected (4).

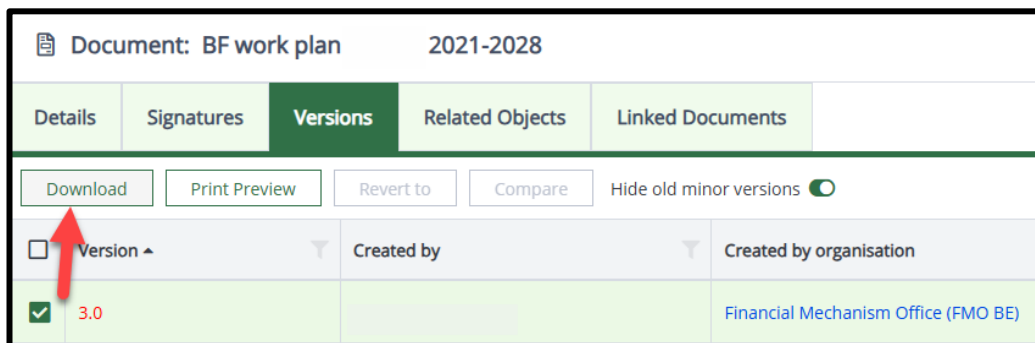
| Version | Created by | Created by organisation | Date | Status |
|---|------------|-------------------------------------|---------------------|----------|
| <input checked="" type="checkbox"/> 3.0 | | Financial Mechanism Office (FMO BE) | 07.07.2025 15:05:21 | Final |
| <input checked="" type="checkbox"/> 2.0 | | Financial Mechanism Office (FMO BE) | 07.07.2025 14:55:10 | Outdated |
| <input type="checkbox"/> 1.0 | | Financial Mechanism Office (FMO BE) | 07.07.2025 14:46:36 | Outdated |

Showing 1 to 3 of 3 entries 2 rows selected

Once the comparison page loads, you will see the *View Changes* (5) tab. This tab will show the number of changes and on which page they were made (6) by comparing the previously submitted Work plan with the new edits. You can download this comparison document by clicking on the download icon (7) on the menu right above the document, this document can be viewed in Word showing the changes between the versions.



It is also possible to download older versions as a document by ticking the checkbox next to a version and then clicking **Download**.



8. Version control revision log

Below you can see what has changed between each revision of the document:

| Version | Date | Author | Rationale |
|---------|---------------|---------------------------|---|
| 1.0 | 10 July 2025 | Silje Lærk | First version |
| 1.1 | 16. July 2025 | Silje Lærk, Niels Bekkhus | Updated first pages with general information plus information about what is available per tab in the Work plan. |