



# **Submit and Update Bilateral Fund Workplan**

## **GrACE User Manual for National Focal Point**

Version 1.1, October 2023

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## 1. Introduction

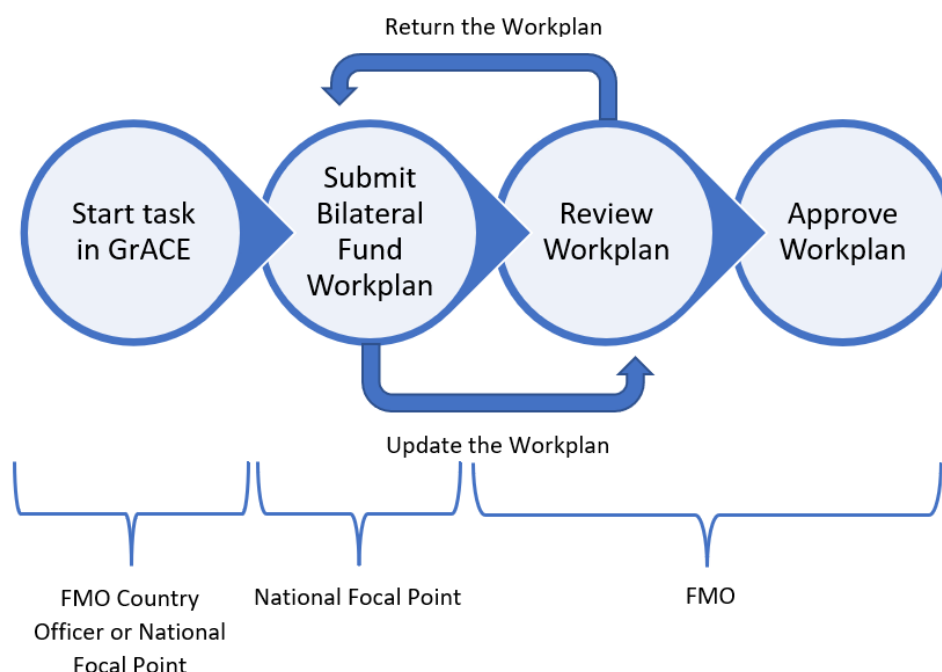
GrACE stands for Grants Administration and Collaboration Environment. The system supports the management of the EEA and Norwegian Financial Mechanisms 2014-2021 and is used by Donor and Beneficiary State entities and the Financial Mechanism Office (FMO). Users access GrACE through the website <https://grace.eeagrants.org/>.

The National Focal Point (NFP) prepares the Bilateral Fund Workplan. 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 Workplan and the NFP updates it at least once per year.

For further help and support, please contact [grace.support@efta.int](mailto: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.

## 2. Bilateral Fund Workplan in GrACE

The following represents the Bilateral Fund Workplan workflow in GrACE. The workflow is started either by the Country Officer or the NFP. Both parties can find the task in their dashboard. There is no fixed date for submission, but it should be in accordance with any annual updates. When the NFP has submitted the Workplan in GrACE, the FMO Country Officer reviews it.

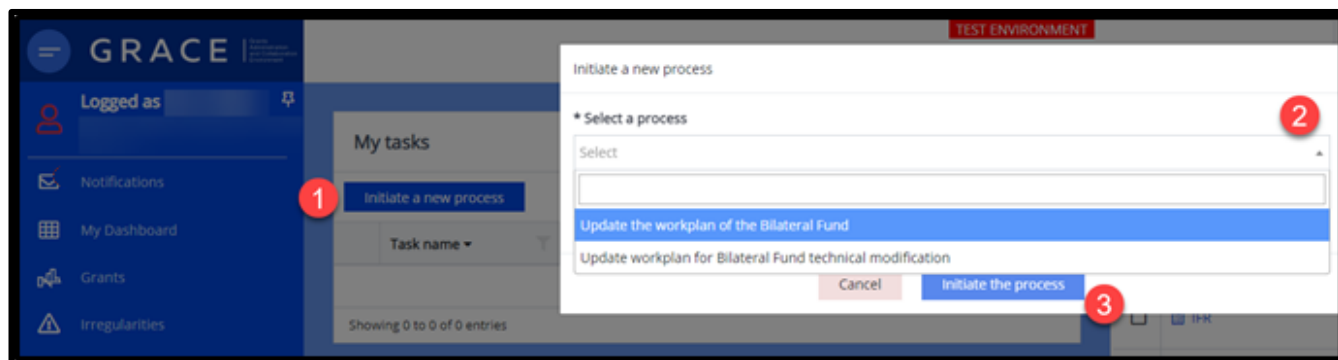


The Joint Committee for Bilateral Funds (JCBF) members are representatives of the NFP, Ministry of Foreign Affairs of the Beneficiary State and the Ministries of Foreign Affairs of Iceland, Liechtenstein and Norway, represented by their respective Embassies. Representatives of the FMO serve as observers in the JCBF. The Workplan for the Bilateral Fund is prepared by the NFP in consultation with the Donors and submitted to the FMO through GrACE.

The FMO may return the Workplan to the NFP with comments. The NFP will then make any necessary changes and re-submit the Workplan to the FMO. The FMO reviews the Workplan once more and then validates the final version in GrACE. Keep in mind that bilateral initiatives will not appear in GrACE unless they are submitted separately from the Workplan.

### 3. Start the Bilateral Fund Workplan workflow

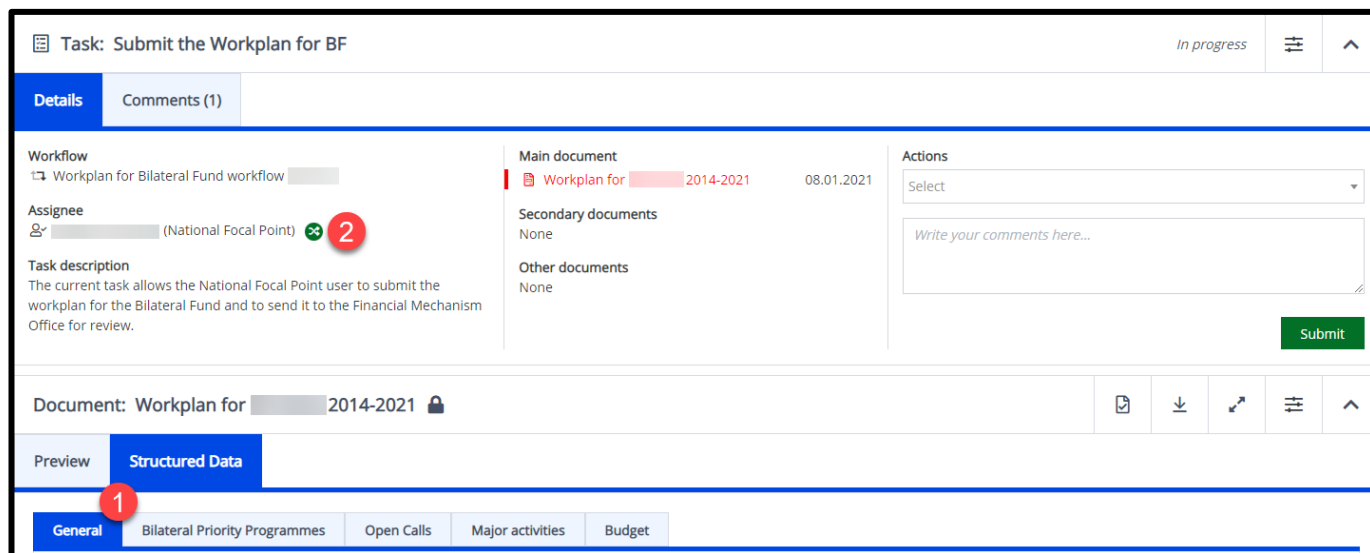
To start the workflow for the Bilateral Fund Workplan, click on 'Initiate a new process' under My tasks on your dashboard (1). Select 'Update the Workplan of the Bilateral Fund' (2) and click on **Initiate the process** (3).



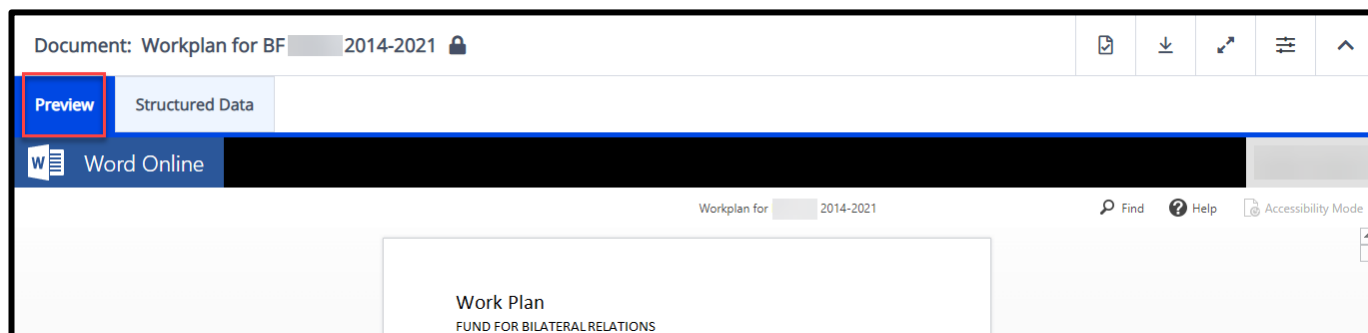
This task can also be started when you are looking at the current workplan by clicking **Initiate a new process** (4).



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). You will register the relevant data and information in the **Structured Data** section. You can reassign the **Update Workplan for Bilateral Fund** to another user with the same role (2).



You can see a printable version of the Workplan that GrACE has created by clicking on the **Preview** tab. This document contains information currently registered under the Structured Data tab.



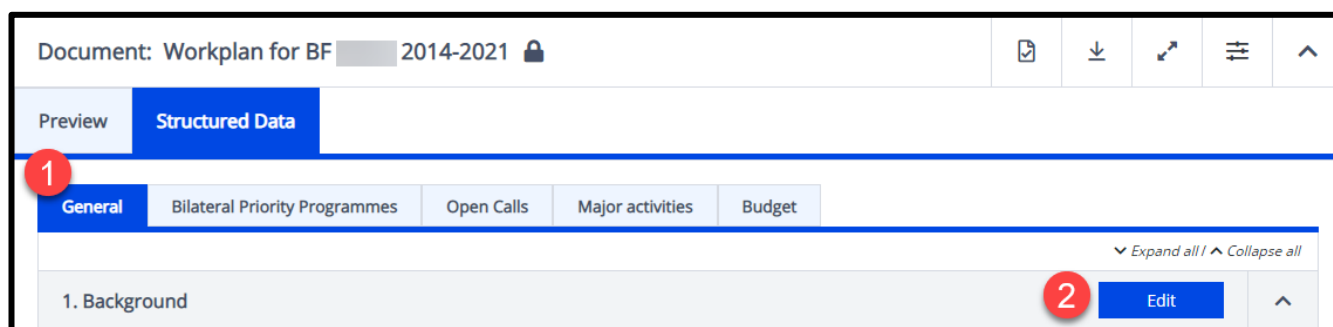
Until you press **Submit**, you have the possibility to **Edit/Update/Save** the information registered as many times as necessary.

#### 4. Fill-in the Workplan

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

- General text of the Workplan
- Bilateral Priority Programmes
- Open Calls
- Major activities
- Budget

The General tab (1) contains text boxes for the first three sections of the Workplan: Background, Main objective, and Implementation system. To fill in, 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 automatically resize according to the amount of text. Clicking **Save** (4) for each section edited will save the data and exit the edit mode. You must do this process individually for each of the three sections of the Workplan under the General tab.

Preview Structured Data

General Bilateral Priority Programmes Open Calls Major activities Budget

Format Arial 18

Words 445, characters 3027.

Cancel Save

The “Bilateral Priority Programmes” tab gives an overview of allocations of Bilateral Funds to programmes from the Memorandum of Understanding (MoU). The Bilateral Priority Programmes are automatically included in the Workplan template. Therefore, it is not possible to add new programmes or remove existing ones. You can, however, click on **Edit** to amend information about the programmes listed, i.e. in case of modifications of the MoU allocation, by selecting the checkbox in front of the programme short name. This will make a text box appear where you can add or remove information. You are also able to modify the figures in the column “JCBF allocation”, i.e. in case of Expressions of Interest.

Document: Workplan for BF 2014-2021

Preview Structured Data

General Bilateral Priority Programmes Open Calls Major activities Budget

Bilateral Priority Programmes

Edit

	Short name	DPP(s)	Funds allocated in MoU	JCBF Allocation	Total Allocation
<input checked="" type="checkbox"/>			€ 0	€ 0	€ 0

The “Open Calls” tab shows the Bilateral Fund’s Open Calls, if any, approved by the JCBF. GrACE does not automatically include information about Open Calls. To add a call, click the **Add** button as highlighted in the picture below. To edit or remove a call, tick the box in front of the call, then click **Edit** or **Remove**.

Document: Workplan for BF 2014-2021

Preview Structured Data

General Bilateral Priority Programmes Open Calls Major activities Budget

Open Calls

Add Edit Remove

	Focus	Indicative timing	Amount set aside in EUR	Max/Min amount grant
<input checked="" type="checkbox"/>	Test	2024-Q1	€ 1,000	

Remember to click **Save** once information is added, edited, or removed to exit the Edit window.

The “Major activities” tab contains the pre-defined bilateral initiatives that the JCBF has approved. The same process as for the Open Calls applies, to Add, Edit or Remove bilateral initiatives. Remember to click **Save** once you have added, edited or deleted information.

The screenshot shows the 'Major activities' tab selected. At the top, there's a document header 'Document: Workplan for BF [redacted] 2014-2021' with a lock icon. Below this are tabs for 'General', 'Bilateral Priority Programmes', 'Open Calls', 'Major activities' (selected), and 'Budget'. Under the 'Major activities' tab, there's a section titled 'Major activities' with a sub-header 'Initiative' and an 'Allocations' column. A table lists one initiative with a budget of € 363,210. Above the table, there are 'Add', 'Edit', and 'Remove' buttons, with the 'Add' button highlighted by a red box.

The Budget tab gives an overview of the allocations of Bilateral Funds that the JCBF has decided. Under this tab, the titles (Bilateral Priority Programmes, Open Calls and Major activities,) are set and not possible to change. The budget amounts for these titles are carried over from the corresponding tabs, and hence not possible to change in this tab. You can, however, edit the budget for “Activities carried out by the NFP” and “Pre-defined activities”. Additionally, it is possible to add or change comments for all titles by clicking on **Edit** in the upper right-hand corner:

The screenshot shows the 'Budget' tab selected. The document header is the same. The tabs are 'General', 'Bilateral Priority Programmes', 'Open Calls', 'Major activities', and 'Budget' (selected). Under the 'Budget' tab, there's a section titled 'Budget' with a sub-header 'Title', 'Budget', and 'Comments'. A table lists two titles with budget amounts of € 250,000. In the top right corner of the 'Budget' section, there is an 'Edit' button highlighted by a red box.

You will be able to click and edit info in the Budget number column (1) as well as the Comments column (2). When finished, click **Save** (3).

Document: Workplan for 2014-2021

Preview Structured Data

General Bilateral Priority Programmes Open Calls Major activities **Budget**

**Budget**

Title	Budget	Comments
Activities carried out by the NFP	€	
Pre-defined activities (total budget for planned pre-defined activities at national level)	€ 179,620	includes all the major activities
LOCALDEV	€ 0	0
Funds still to be allocated	€ 160,380	
Total	€ 340,000	

Cancel Save

Please see instructions for the tab “Bilateral Priority Programmes” for how to update JCBF budget allocation if you need to change this.

## 5. Submit the Workplan

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 Workplan. Optionally, you can leave a comment for FMO.

Task: Submit the Workplan for BF In progress

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.

**Main document**  
Workplan for BF 2014-2021 25.01.2021

**Secondary documents**  
None

**Other documents**  
None

**Actions**  
Send to Financial Mechanism Office

Write your comments here...

Submit

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



## 6. Update the Workplan further to FMO comments

In case further changes are needed, the FMO Country Officer will return the Update Workplan for Bilateral Fund task to the NFP. Accordingly, you will receive an Update Workplan for Bilateral Fund task in GrACE.

In the task details, you can access the document with comments from FMO (if any) in the section Secondary Documents:

Additionally, you can see the track changes/how many changes were made on which page under the **View Changes** tab:

In the “Comments” tab, you can view any comments left by FMO:

Task/Workflow	Action taken: Comment	Date created	Author
<input type="checkbox"/> Review Workplan submission	Return to NFP	06.03.2023 14:06:17	(FMO)

Showing 1 to 1 of 1 entries

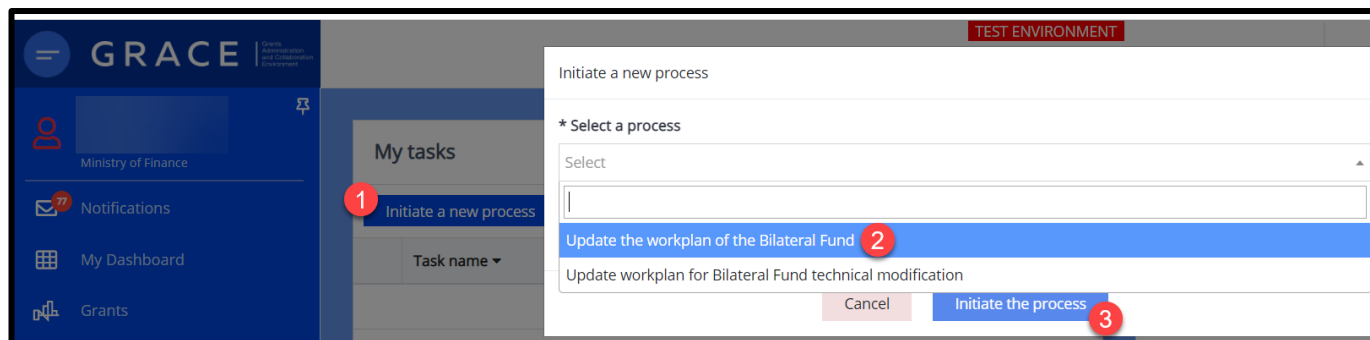
You can now edit the Workplan as shown above in Chapter 4 – Fill in the Bilateral Fund Workplan. When ready, you can submit the Workplan to FMO once more.

## 7. Updating the Workplan at a later stage

### 7.1. Amendment of the Workplan decided by the JCBF

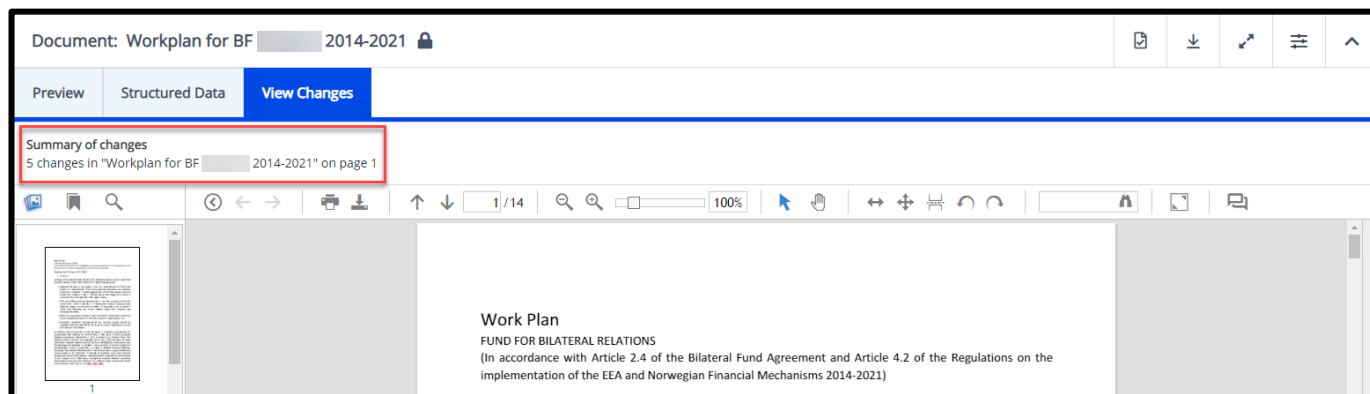
In the previous steps we have shown how to submit the Workplan to the FMO.

To update a Workplan that has already been submitted and approved by the FMO, further to a decision by the JCBF to amend the Workplan (e.g. to include new initiatives or modify priorities), the NFP has the possibility to start the update Workplan workflow itself. You will find this option from your Dashboard by clicking **Initiate a new process** (1) and then select "Update the Workplan 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 Workplan 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** tab. This tab will show the number of changes and on which page they were made by comparing the previously submitted Workplan with the new edits.



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

When you submit you will be asked at what time the new Workplan 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.

TEST ENVIRONMENT

\* Input adoption date

1

2

3

Main document		
Workplan for	2014-2021	14.01.2021
Secondary documents		
None		
Other documents		

## 7.2. Updating the Workplan with a technical modification

If there is a technical modification needed for the Workplan, the NFP can initiate this from the dashboard. Please see the steps described in the sections above on how to fill in the Workplan and submit it to the FMO. This option is relevant e.g. to correct clerical mistakes. Moreover, should a JCBF decide to approve the amended Workplan, e.g. once a year or at a JCBF meeting, the NFP could use this option to include in GrACE the individual modifications decided by the JCBF, and then submit all the changes in one go to the JCBF as described in 7.1.

GRACE

Ministry of Finance

Notifications my Dashboard

Grants

My tasks

1

Initiate a new process

task name

TEST ENVIRONMENT

Initiate a new process

\* Select a process

Select

2

Update workplan for Bilateral Fund technical modification

3

Cancel

Initiate the process

## 8. View the Workplan

The final Workplan can be viewed under the Finance tab under the Bilateral Fund programme page (1). The latest version can either be previewed in GrACE (2) or downloaded as a Word document or PDF by clicking on the **Download** button in the right-hand corner (3).

Programme: BF

Programme implementation

Title  
Bilateral Fund

Beneficiary State

Legal Framework & Contacts

MoU Data

Bilateral Fund Agreement

Agreement Modifications

Irregularity Cases

Contacts

Finance

Workplan

Budget

Payments

Forecasts

FMO Audits

Modalities

Calls

Bilateral Initiatives

Assessment

Implementation status

Documents

Documents

Document: Workplan for BF 2014-2021

Final

Version 6.0 (latest final version)

Preview

Structured Data

Word Online

Workplan for BF 2014-2021

Find

Help

Accessibility Mode

To access older versions of the Workplan and/or to compare the latest version, first click the 'Workplan' tab (1). Then click the down-facing arrow of *Document: Workplan for BF [Beneficiary State] 2014-2021* (2)

Programme: EE-BF

Programme implementation

Title  
Bilateral Fund

Beneficiary State  
Estonia

Legal Framework & Contacts

MoU Data

Bilateral Fund Agreement

Agreement Modifications

Irregularity Cases

Contacts

Finance

Workplan

Budget

Payments

Forecasts

FMO Audits

Modalities

Calls

Bilateral Initiatives

Assessment

Implementation status

Documents

Documents

Document: Workplan for BF Estonia 2014-2021

Final

Expand/Collapse

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).

Document: Workplan for BF 2014-2021
Final

Details
Signatures
**Versions**
Related Objects
Linked Documents

Download
Print Preview
Revert to
Compare
Hide old minor versions

<input type="checkbox"/>	Version	Created by	Created by organisation	Date	Status
<input checked="" type="checkbox"/>	6.0		Financial Mechanism Office (FMO BE)	22.03.2023 15:18:15	Final
<input checked="" type="checkbox"/>	5.0		Financial Mechanism Office (FMO BE)	29.11.2022 17:09:43	Outdated
<input type="checkbox"/>	4.0		Financial Mechanism Office (FMO BE)	28.11.2022 11:21:37	Outdated
<input type="checkbox"/>	3.0		Financial Mechanism Office (FMO BE)	02.05.2022 13:40:45	Outdated
<input type="checkbox"/>	2.0		Financial Mechanism Office (FMO BE)	07.09.2021 14:17:52	Outdated

Showing 1 to 5 of 5 entries 2 rows selected

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