



Introduction to GrACE

GrACE User Manual for all users

Version 1.0, December 2022

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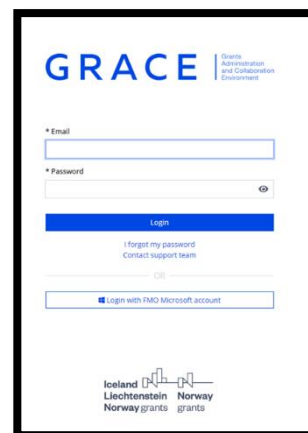
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1. Introduction

GrACE is short for **GR**ants **A**dministration and **C**ollaboration **E**nvironment. The system is used for the management of the EEA and Norwegian Financial Mechanisms 2014-2021 and is intended to be used by Donor and Beneficiary State entities and the Financial Mechanism Office (FMO). GrACE is accessed through the website <https://GrACE.eeagrants.org/>. GrACE is also possible to access from your mobile phone or tablet this way. The system will adjust to use the space available, so a small screen will show a more compact version than a large computer screen, but the same information will be available.

What information you will be able to see and access in GrACE depends on your role and function in the system. For example, Programme Operators will have access to their needed information and tasks in GrACE while Certifying Authorities will have different access rights and tasks available to them. Therefore, the screenshots and images you see in this manual might be slightly different than what you will find when you login to the system.

For further help and support, please contact GrACE.support@efta.int. This user manual and other manuals can be found at our website <https://eeagrants.org/GrACEmanuals>, be sure to check in sometimes so you are sure you have the latest version of the user manual.



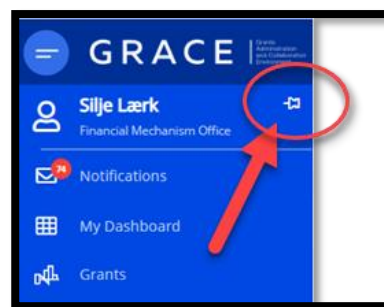
2. Account creation and login

For information on user accounts and contact details, please follow the instructions in the Contacts user manual found here: <https://eeagrants.org/resources/GrACE-user-manual-manage-contacts>

For instructions on the 2-factor authentication security, please check the 2-factor user manual found here: <https://eeagrants.org/resources/GrACE-user-manual-2-factor-authentication>

3. The menu

The left-hand menu is always visible, but it will become smaller by default when you are not using it. You can choose to pin it to always be open, by clicking the little pin symbol next to your name:



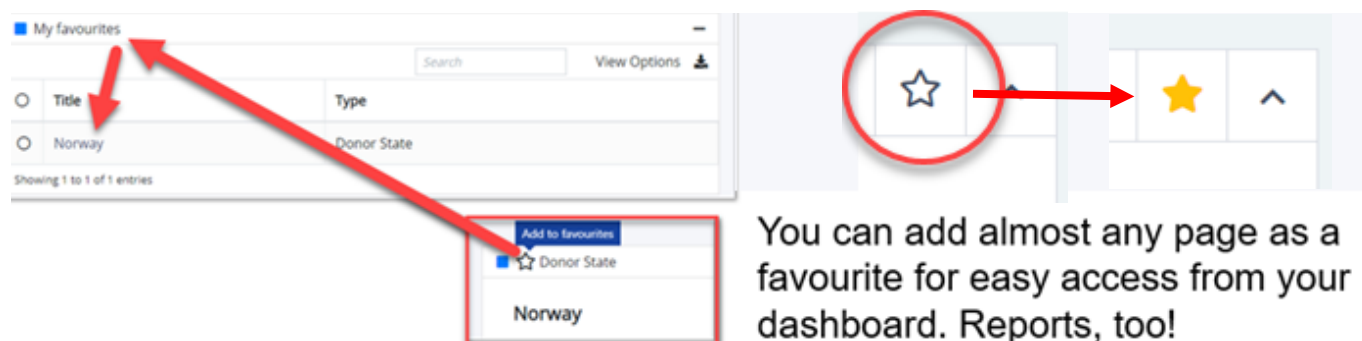
What you see listed on this menu depends on your access rights and needs in GrACE. FMO will see different items on the list than a PO or FO for example.

4. Dashboard

The dashboard is the main area you will see when you first login to GrACE (unless you followed a link that took you directly to a document or a task). In the dashboard you will find your favourites, your tasks, saved searches and other useful links and information.

4.1. Favourites

Several sections in GrACE have a little white star symbol in the corner. By clicking on this star so that it becomes filled in and golden, you make it a favourite. It will then be visible on your dashboard for easy access, like a bookmark.



4.2. Sections handling

Below you will find an image with numbers, please find the numbers in the picture corresponding to the following points:

- 1) If you would like to get back to the start page, the dashboard, you can access it here from the main menu.
- 2) "My tasks" shows tasks that the system is waiting for you to perform. Click on the task name to open up your task and perform it.
- 3) "My team(s) tasks" is where you can see which tasks your colleagues currently have. If you are on holiday, your colleagues will be able to take over your tasks by seeing them here and using the buttons available to take over. You can do the same with your colleagues' tasks from this area.
- 4)



Each section has buttons in the corner. In the red frame next to number 4 in the picture, you see on the first row of buttons the Toggle full screen to maximize the section and make it bigger. You can also expand or collapse the section to only 1 small header line.



On the second row of buttons, you see the Quick Search icon which searches through the results in this section only (so not *all* of GrACE!)




In the middle of the second row, you see the Options button which is shaped like a tract/funnel, with a cogwheel next to it. This button is divided into 2 – by clicking on the Tract you will access the View Options where you can turn on and off Columns and search/filter. By clicking on the arrow, you will access previously stored searches. This functionality is the same all over GrACE and can be very useful to hide and show columns for example.

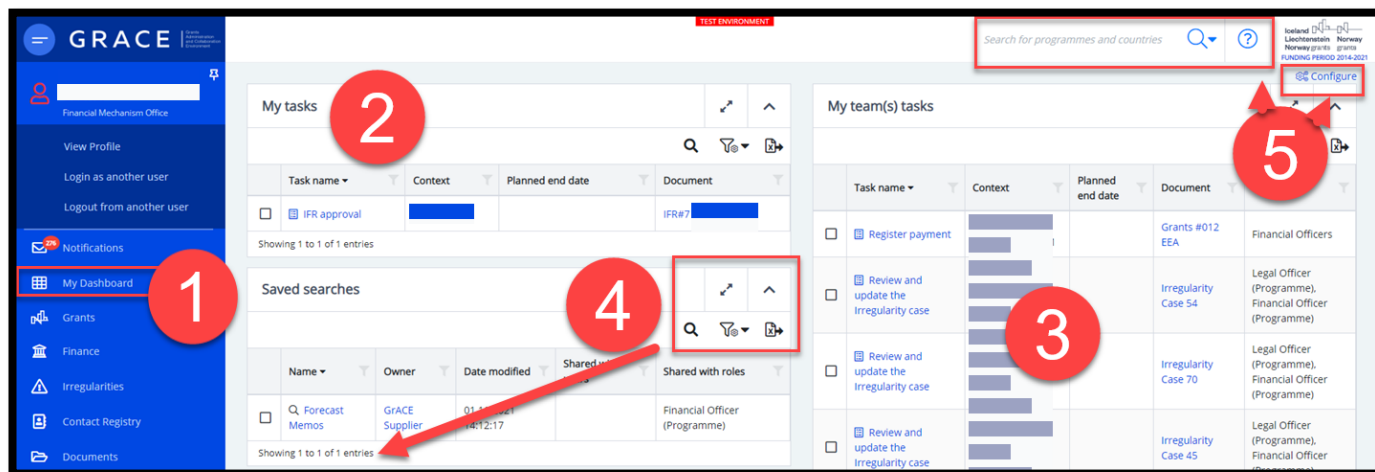


The last button on the second row is for exporting what you see, for example to an Excel spreadsheet file.

- 5) In the right-hand corner you find the option to **Configure** your personal preference settings for this dashboard.

Here you will find the main general **search** for GrACE. You can start typing a country name or an abbreviation for the programme you are looking for and the search is smart enough to take you directly to the main page of that country/programme if there is only 1 match in the search results. Notice that there is an arrow next to the search icon, this will take you to other more specific searches in GrACE.

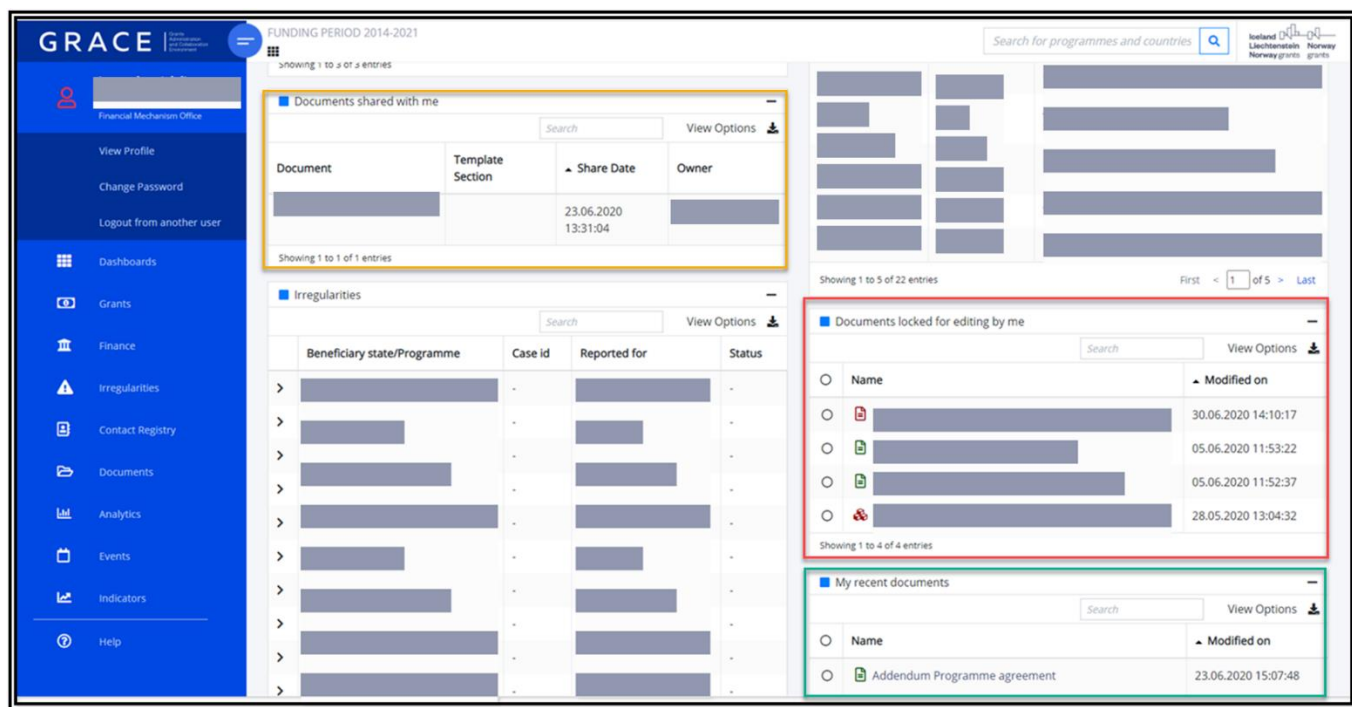
The **help** icon  is smart in the sense that it will change which help sections you see, depending on which page you are looking at when you click on it.



The screenshot shows the GRACE dashboard interface. Numbered callouts highlight the following elements:

- 1**: The 'My Dashboard' menu item in the left sidebar.
- 2**: The 'My tasks' section, which displays a table of tasks with columns for Task name, Context, Planned end date, and Document.
- 3**: The 'My team(s) tasks' section, which displays a table of tasks assigned to team members, including columns for Task name, Context, Planned end date, Document, and the assigned officer.
- 4**: The 'Saved searches' section, which displays a table of saved searches with columns for Name, Owner, Date modified, and Shared with roles.
- 5**: The 'Configure' button located in the top right corner of the dashboard.

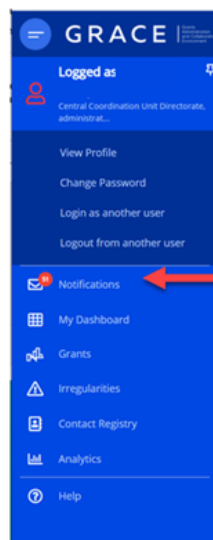
Different sections appear on the dashboard as needed:



The screenshot shows the GRACE dashboard interface with different sections visible based on the user's role. The sections are:

- Documents shared with me**: A table showing documents shared with the user, with columns for Document, Template Section, Share Date, and Owner.
- Irregularities**: A table showing irregularities, with columns for Beneficiary state/Programme, Case id, Reported for, and Status.
- Documents locked for editing by me**: A table showing documents locked for editing by the user, with columns for Name, Modified on, and a status icon.
- My recent documents**: A table showing recent documents, with columns for Name, Modified on, and a status icon.

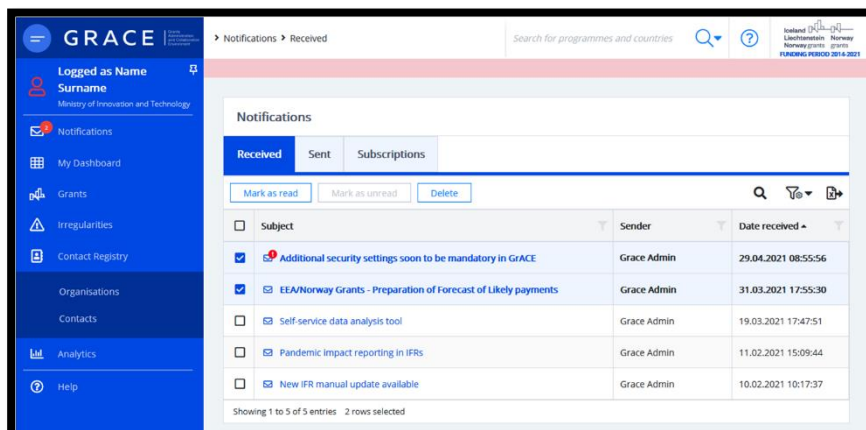
5. Notifications



"Notifications" contains the communication sent to the user.

GrACE will send you an email when you have a task waiting for you in the system, as well as a notification here.

The FMO might also communicate with you through the system notifications. You can access the notifications from the envelope icon on the menu bar (see arrow in left picture). The notifications will be listed in the main window (below).



6. Searches and filters

There are many places to search and filter in GrACE. In the top right-hand corner, you find the main search:

It is possible to just type

Search for programmes and countries



..or to select a specific search and find these things:

Available searches

Organisations

Contacts

Bilateral Initiatives

What you see when you click on the arrow next to the search icon depends on your access privileges and rights in the system.

6.1. Section searches

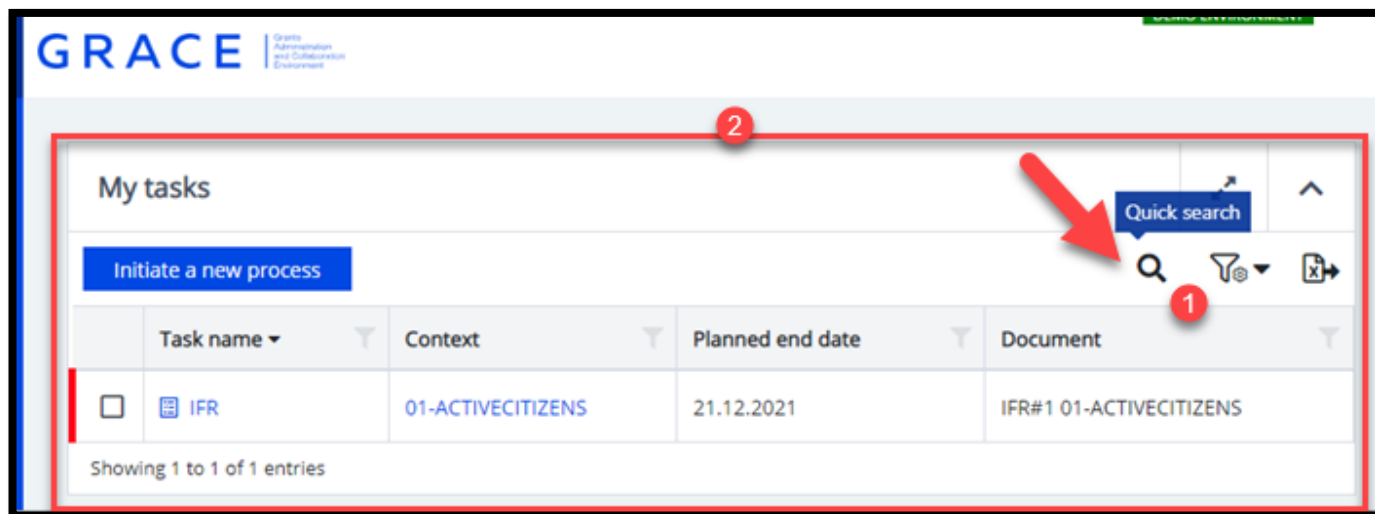
As mentioned in the chapter covering *The* menu

The left-hand menu is always visible, but it will become smaller by default when you are not using it. You can choose to pin it to always be open, by clicking the little pin symbol next to your name:



What you see listed on this menu depends on your access rights and needs in GrACE. FMO will see different items on the list than a PO or FO for example.

Dashboard, you can also search (1) inside a section [e.g., 'my tasks'] (2). When you see the small search icon in the corner of a section it means that a Quick Search (1) for only that section is available, and GrACE will only search in that specific section – not all of GrACE:



6.2. Section filter

In most sections inside GrACE, you can set up a filter to show what is useful for *you*. These filters can be stored as quick searches (see the previous chapter 4.2, *Sections handling*) for future use, and you can also choose the default way of displaying results for your profile in GrACE. Please see the picture below and find the corresponding numbers as explanation:



1. Click on the tract / funnel icon to open up the Filtering and settings
2. Tick the boxes on / off for the columns you would like to see
3. Enter search words/filters here if you want, but you do not need to - these can stay empty
4. Select how many rows of results you want to see (be careful with "all" as it can slow things down)
5. Apply – or alternatively, click the arrow and save this view as the default for you

A closer look at step 5:

Here you can save the selected columns and set this specific search/filtering as your default. If you always want a specific column to show, or always see only certain results, this option will let you see the results this way every time – it will become your new default. If you want to reset the view to how it was, click on the “Load system default” to reset the view to standard.

When you click Apply, you can store the search / filtering for later – click on the small arrow behind the filter symbol and select “Save as new”. This way you can run the same search later, perhaps this is something you want to do periodically. You can also export the results.

7. Tables setup

The sections in GrACE usually have a table inside of them to display information.

Size of the table

The system adjusts to the internet browser's size. If you view GrACE on a large PC screen and your browser window fills the whole computer screen, you will see more details on the screen than if you view it on a mobile phone.

<input type="checkbox"/>	Country	Contract status	Programme	Programme areas	Project code	Project internal ID	Project title	Financial Mechanisms	Date of project signature	Date of last modification	Published
<input type="checkbox"/>	Greece	Signed	GR-ACTIVECITIZENS	PA15	GR-ACTIVECITIZENS-0105	E.3.3/EEA-811	Safe at Work	EEA Grants	01.03.2022	18.08.2022 22:37:51	Yes
<input type="checkbox"/>	Greece	Signed	GR-ACTIVECITIZENS	PA15	GR-ACTIVECITIZENS-0107	E.2.5/EEA-856	Tackling gender inequalities in research and higher education in Greece (ENDRHED)	EEA Grants	01.03.2022	18.08.2022 22:37:10	Yes
<input type="checkbox"/>	Greece	Signed	GR-ACTIVECITIZENS	PA15	GR-ACTIVECITIZENS-0084	E.3.3/EEA-172	... in health, prevention and human rights: a new methodological approach	EEA Grants	23.12.2021	18.08.2022 22:30:14	Yes
<input type="checkbox"/>	Czech Republic	Completed	CZ-ACTIVECITIZENS	PA15	CZ-ACTIVECITIZENS-0028	62500-2019-003-0121	Between the lines - how the media sometimes lie	EEA Grants	23.04.2020	18.08.2022 16:52:12	Yes
<input type="checkbox"/>	Bulgaria	Signed	BG-LOCALDEV	PA10	BG-LOCALDEV-0002	BGLD-1.001-0001	Innovative Community Care Models in Favour of People with Chronic Diseases and Permanent Disabilities	EEA Grants	17.05.2019	18.08.2022 15:12:01	Yes

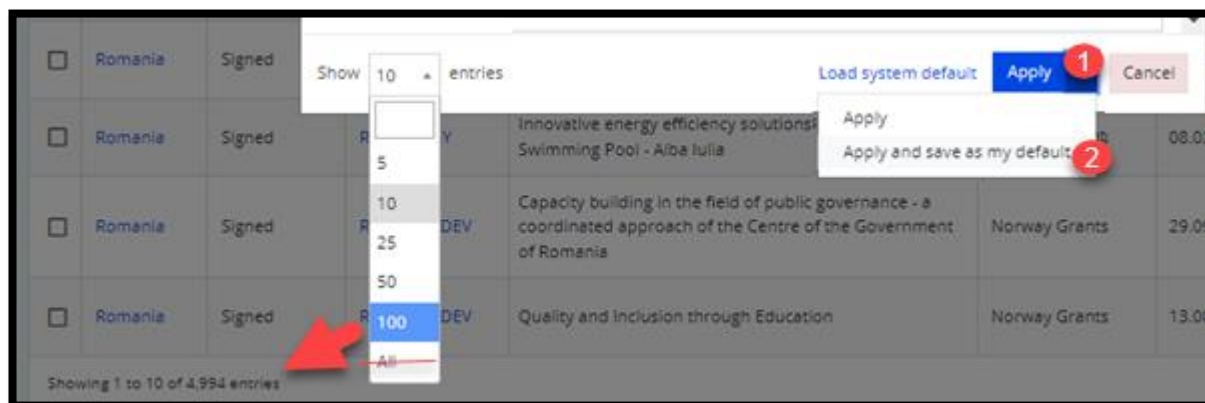
However, all the same information is possible to be shown, it is just more compact. Click on the left-hand + symbol. Example:

<input type="checkbox"/>	Country	Contract status
<input type="checkbox"/>	Greece	Signed
<input type="checkbox"/>	Greece	Signed
<input type="checkbox"/>	Greece	Signed
<input type="checkbox"/>	Czech Republic	Completed
<input type="checkbox"/>	Bulgaria	Signed

<input type="checkbox"/>	<input type="checkbox"/>	Country	Contract status
<input type="checkbox"/>	<input type="checkbox"/>	Greece	Signed
Programme GR-ACTIVECITIZENS			
Programme areas PA15			
Project code GR-ACTIVECITIZENS-0105			
Project internal ID E.3.3/EEA-811			
Project title Safe at Work			
Financial Mechanisms EEA Grants			
Date of project signature 01.03.2022			
Date of last modification 18.08.2022 22:37:51			
Published Yes			

Number of results

You can decide to display more results on each page if there are many hits in your tables. This can be saved as your default, see the previous chapter for more information on setting up filters. Note that you should be careful about selecting “all” as this can make GrACE slower for you – see example in picture below, where “All” would be displaying nearly 5000 entries every time you open GrACE to this page. If you want to see many results on each page, it is safer to select 50 or 100 and then turn to page 2 if needed.

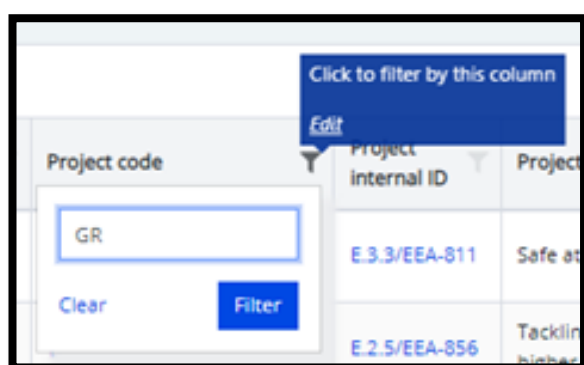


Below you see an example of 10 entries being shown and this gives 18 pages of results. You can type in the box where the current page number is being shown (in the example “1”) and jump directly to for example page 5. You can also jump to the first and last page, or next and previous:

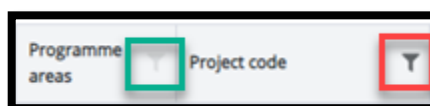


Filtering columns

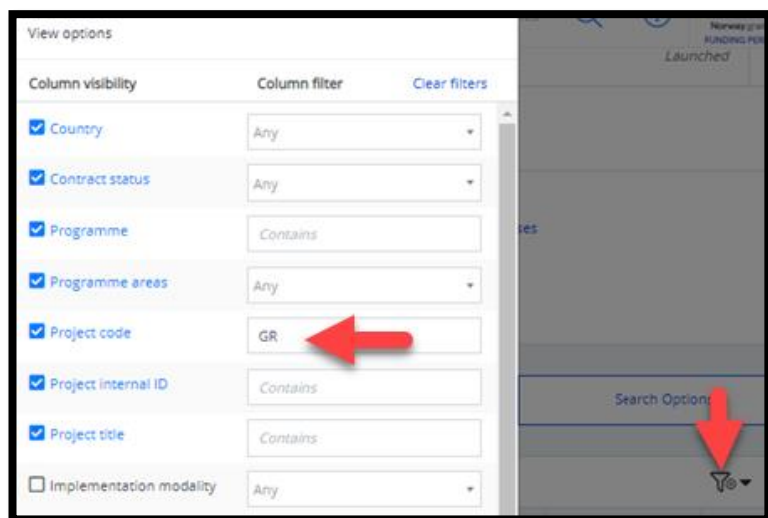
Like the filtering and searching for the whole section as mentioned in chapter 6.2 *Section filter*, you can click on the Tract icon on any column header to filter so that you only see the results searched for.



You can check if there is a filter or not on by the colour and the symbol itself. See example below, the symbol behind “Programme areas” is not activated but the symbol after “Project code” is filtered and active.



If you click on the filtering icon for the whole section, you will see that the filtering for Project code is indeed on.



8. Workflow setup

Workflow is the name used for the process of getting a set of tasks done in the system. One or several documents will be attached to the workflow, and it will be sent from person to person and organisation to organisation until the pre-defined order of actions is completed.

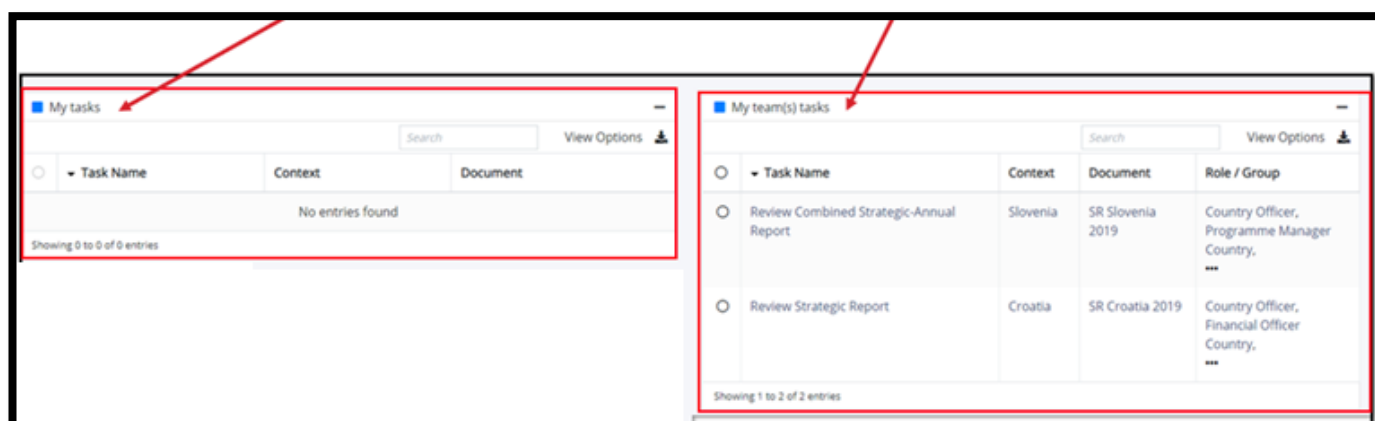
8.1. Tasks in a workflow

If you need to deliver a report to the FMO, there is probably a workflow for this in GrACE. A workflow consists of several tasks - there is a task for you, then a task for a second person after that, then perhaps a third before in the end the workflow goes to the FMO and is completed.

You will receive an email and notification in GrACE when you have a task waiting for you. They are all listed in your dashboard when you login to GrACE. On the left side is your tasks and, on the right, your team's. You and your team can send the tasks between yourselves.

Tasks for you.

Tasks for your whole team. Your colleagues will see *your* tasks here.



To view and start on a task given to you, click on the link of the task name under the column title "Task Name".

My tasks

	Task name ▾	Context ▾	Planned end date ▾	Document ▾
<input type="checkbox"/>	Upload signed replenishment letters	Norway		FMO Admin #007 EEA
<input type="checkbox"/>	Upload signed replenishment letters	Norway		FMO Admin #008 Norway

8.2. Documents in a workflow

There are often many documents as part of workflows. Sometimes these are generated by the system based on templates created by the FMO. Some of the documents such as selection committee meeting minutes or signed versions of documents, are uploaded by you. This depends on the workflow. Please see user manuals for specific reports and tasks at our website <https://eeagrants.org/GrACEmanuals>.

In a workflow, there can be many documents. Jump between them by clicking on them. A red mark in front means selected, you can also see it by the title below.

Task: IFR

Details Comments (0)

Workflow

Interim Financial Reporting for Directly contracted programmes (ACTIVECITIZENS)

Assignee

FO one for BS one (Fund Operator)

Task description

Please fill in the IFR and sign it electronically or upload a signed paper copy.

Main document

IFR#1 01-ACTIVECITIZENS

Secondary documents

None

Other documents

None

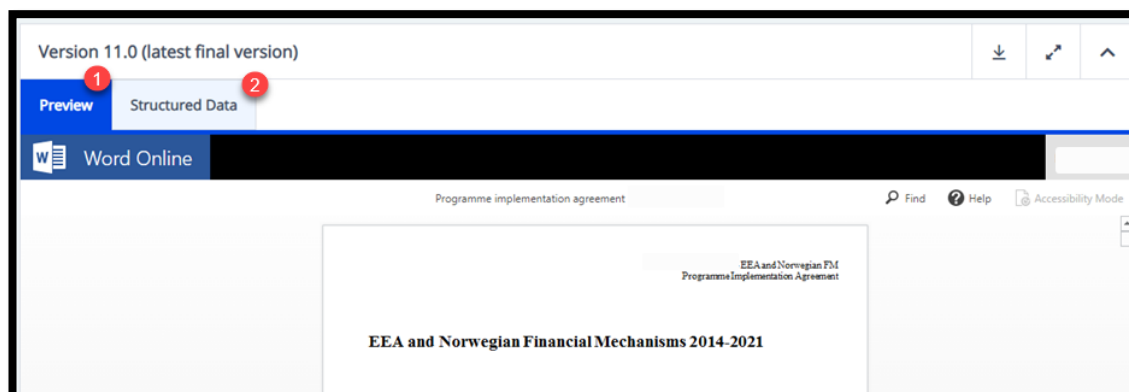
Document: IFR#1 01-ACTIVECITIZENS

Preview Structured Data

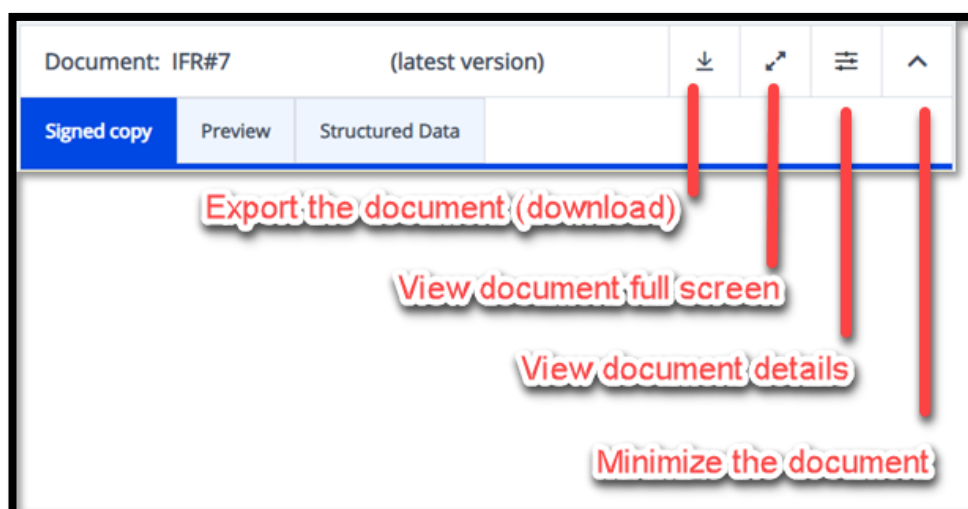
Included (Part A) Proposed (Part B) Outcomes Milestones Certification FO

8.2.1. Viewing documents

When viewing a document, in a workflow or otherwise, you might only see 2 tabs initially. This is Preview (1) and then the Structured Data (2). Once you click on Structured Data, several sub-tabs (3-7) might reveal themselves, depending on the workflow and your tasks:

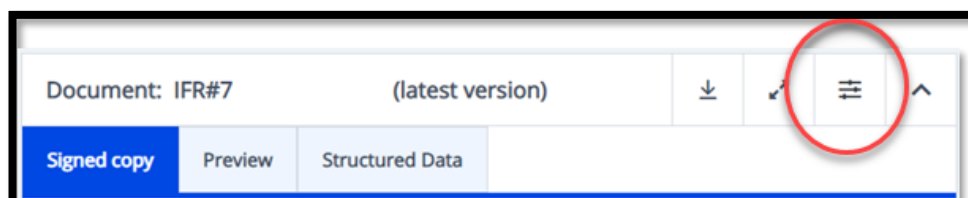


In the right-hand corner of the title bar, you will find different icons regarding the document:



8.2.2. Details of a document

To view more details regarding a document, click on the 3 lines in the corner of the title bar.



Depending on your access rights and which kind of document you are viewing, you will see the Versions tab.

1. Click on Versions at the top

- Old minor versions (minor versions are not full numbers like version 1 or 2, but smaller work-versions like 0.3, 0.4) are hidden by default so that the list will not be so long and confusing. However, you can show them if you want by sliding this button (2).
- Here you can see the version number.
- Below the versions, the document is shown. You can see in the title bar which version you are currently looking at – and it will also tell you if you are looking at the latest version of the document or not.



If someone else are working on the document, you might not be able to see the latest version or the latest changes. In that case, it will most likely be available to you as soon as the other person has finished editing in their task. (This depends on your access to the system.) See point 4 above for how to check if you are looking at the latest document.

9. Contacts

When accessing contacts in GrACE, it is possible to search for them either by organisation (1) or individually (2) under Contact Registry in the left-hand menu.

Usually, it's best to search for contacts by emails since it's possible for multiple contacts to have the same name. Like other sections of GrACE, it is possible to filter contacts using filters such as country and various roles (organisation, individual, job positions etc.).

For more information, please refer to our user manual 'managing contacts' at <https://eeagrants.org/GrACEmanuals>.