



Manage contacts

GrACE User Manual for external users

Version 4.0, November 2022

Table of contents

1. Introduction	3
2. Managing contacts in GrACE	3
3. Creating new contacts.....	3
4. Managing organisation roles	5
4.1. Giving access rights:.....	5
4.2. Removing access rights:.....	7
4.3. Setting a new Primary Contact for a Role	7
5. Requesting user activation.....	8
6. Edit existing contacts from your organisation	9
7. Deactivate contacts.....	10
8. Manage Joint Committee for Bilateral Funds (JCBF) members (by NFP).....	11
9. Manage Cooperation Committee members for a programme (by PO/FO).....	12
10. View Contacts Registry – Organisation.....	13
11. View Contacts Registry – Contacts	14

1. Introduction

GrACE is short for Grants Administration and Collaboration Environment. 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).



This manual serves as a guidance for users on how to manage the contacts in GrACE. More specifically

- how to request new user accounts for persons within their organisation
- how to deactivate contacts which do not work in their organisation anymore
- where to find the contacts from their organisation which have a GrACE account

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 for updated versions.

2. Managing contacts in GrACE

Here is a summary of the actions that you can perform in GrACE as a user, further detailed in the next chapters:

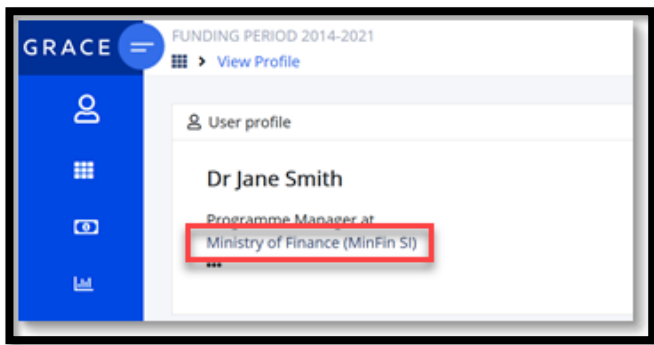
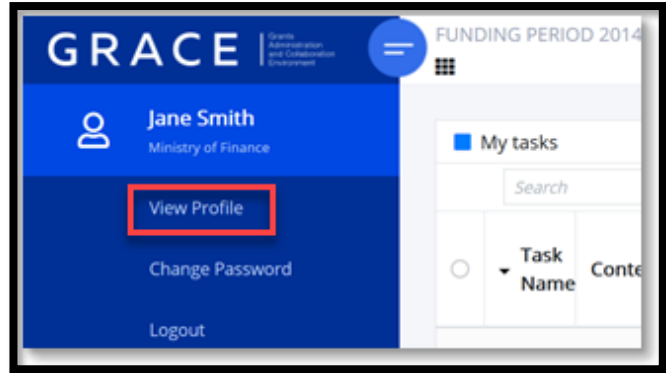
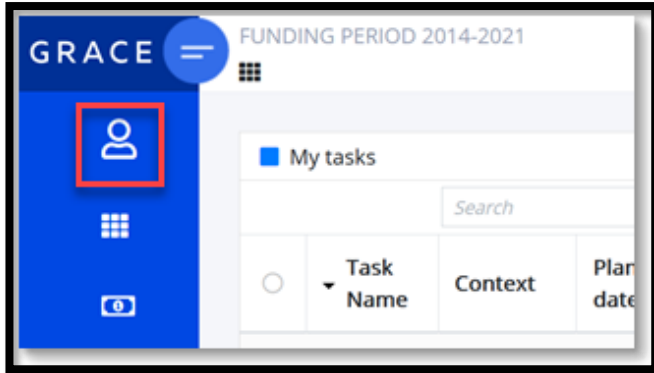
- Create contacts for your organisation in GrACE
 - Request user accounts for these contacts
 - Edit the existing contacts in your organisation in GrACE
 - Deactivate users from your organisation in GrACE
 - Manage the Role access for you and your colleagues
-  
- Create/edit/deactivate users for other organisations (besides yours) ⇒ Contact GrACE support if these are needed
 - Change organisation details (name, location etc)

3. Creating new contacts

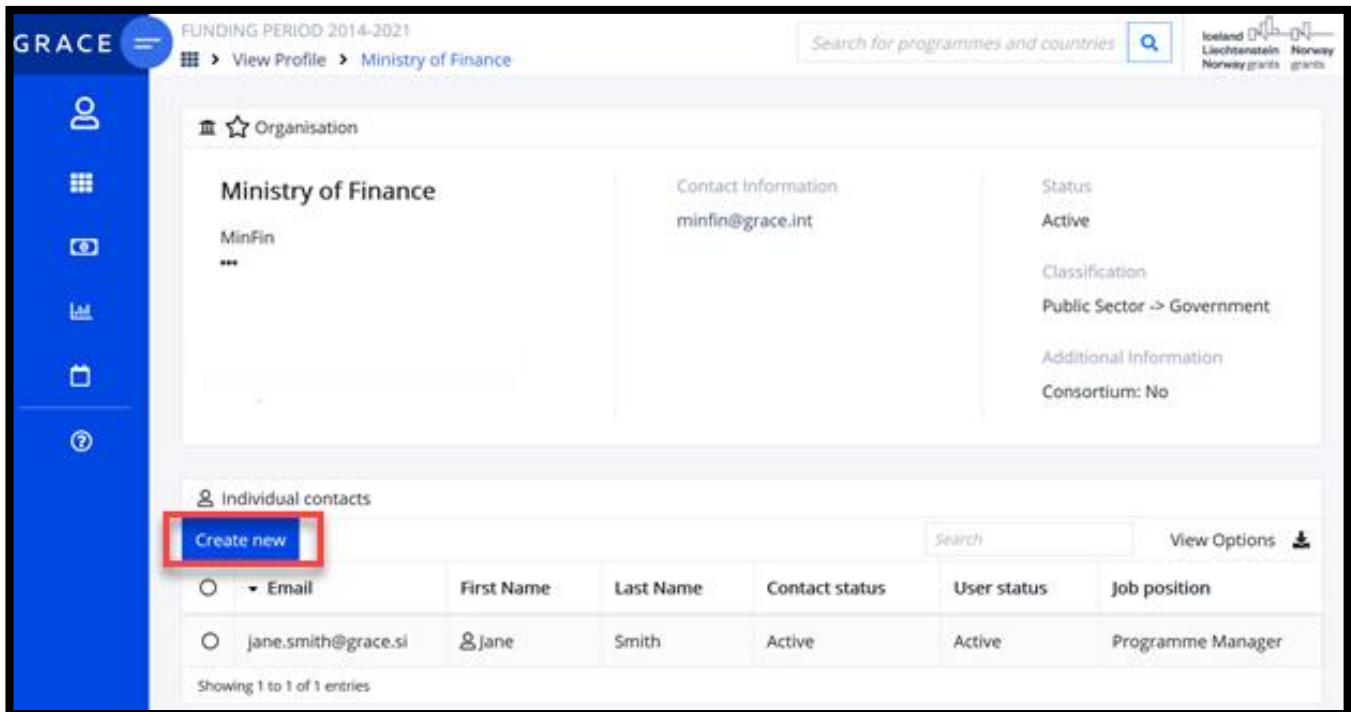
In GrACE, there are two types of accounts:

- 1) **Contact:** This is a basic type of account and can be used for simply administration purposes if needed. This creates a profile for a person with name and contact details. Registering as a contact is the first step in making an active user which can login, but it can also be the only step needed if you would simply like to have the contact details stored in GrACE for administrative purposes like an address book.
- 2) **User:** This is making the previously mentioned contact into an active user in GrACE who can login to the system to perform tasks. The contact will be sent to FMO for approval before being able to login.

GrACE users can create new contacts and users within their organisations (e.g., within the same Programme Operator). This is done through the organisation page, which is accessed from the user profile.



A new contact is created by selecting **Create new**.



Please fill in the below form. Fields marked with an asterisk are mandatory, however, it is preferred that all fields are filled in, if possible.

By selecting **Save** the contact is created. By selecting **Save+new** the contact is created, and a new blank form appears allowing the user to create more contacts at once.

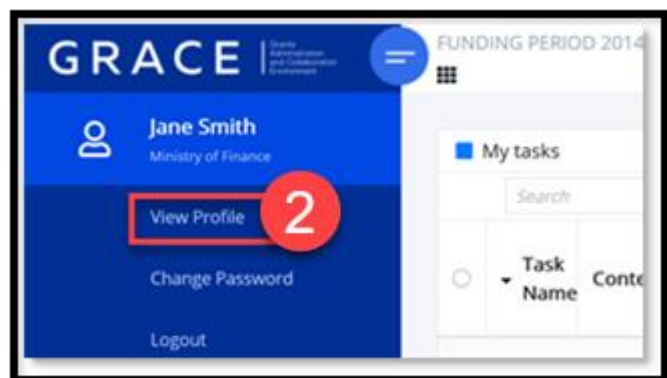
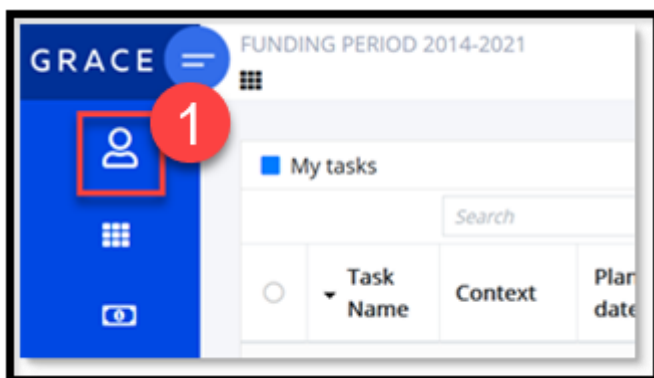
If the contact is registered for administrative purposes and for storing of their contact details, this is now complete. If you wish to convert the contact into an active user who will be able to login to the system, please request a user activation as mentioned in the next chapter.

4. Managing organisation roles

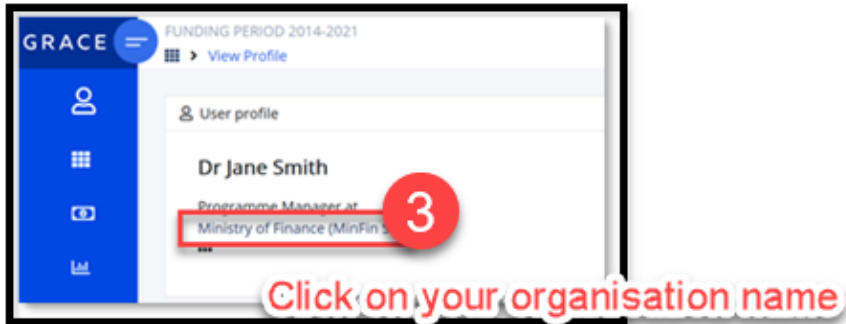
You can decide which organisation roles your colleagues should have access to if your organisation has many roles.

4.1. Giving access rights

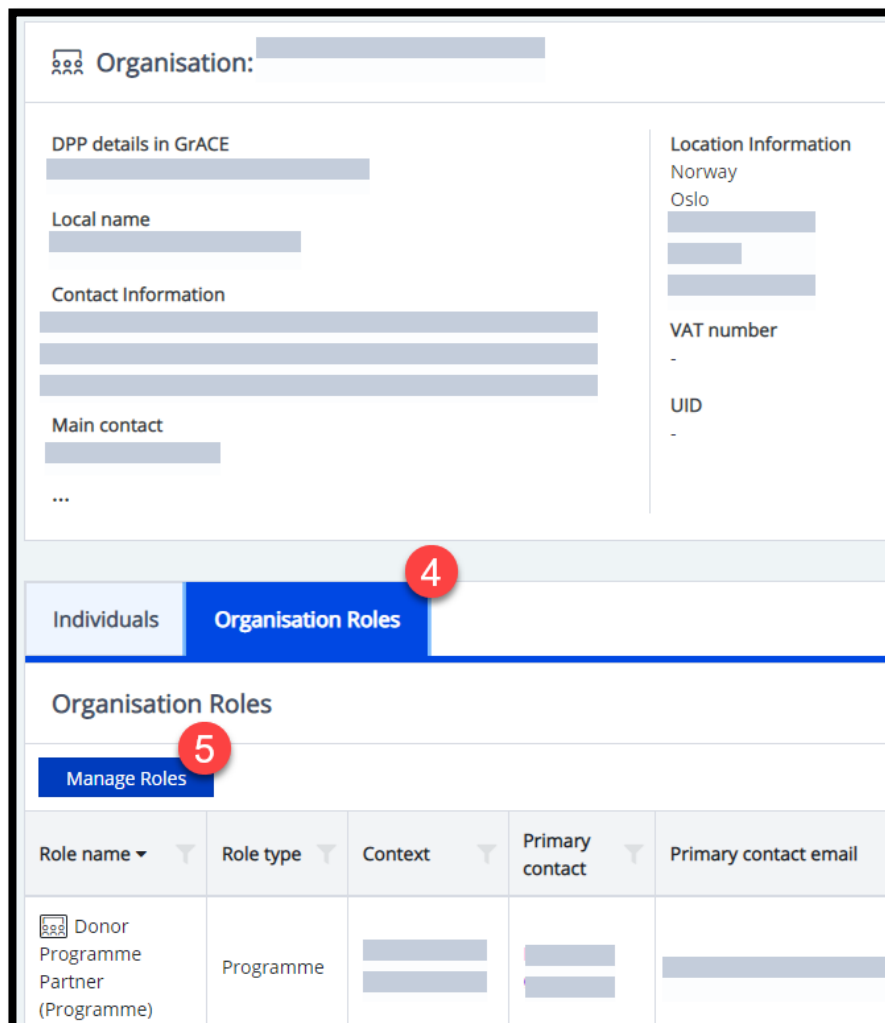
- 1) Select the user icon in the menu
- 2) Select "View Profile"



- 3) Click on your organisation name




- 4) Click on "Organisation Roles"
- 5) Click on "Manage Roles"



- 6) Click on the drop-down list for the Role name you would like to add colleagues to
- 7) Select the colleague you would like to add
- 8) Click on "Save".

Manage Roles:

Any change in the role of individuals made at the user's own initiative should be in accordance with the legal framework provisions on separation of functions and functional independence and the applicable management and control system description.

Role name	Role type	Context	Members
 Fund Operator	Programme		<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="width: 80%;"> <input type="text" value="Select user"/> </div> <div style="text-align: right;"> Primary Contact <input checked="" type="radio"/> </div> </div> <div style="border: 1px solid #ccc; padding: 2px;"> Add all <div style="display: flex; justify-content: space-between;"> <div style="width: 90%;"> <div style="background-color: #f0f0f0; padding: 2px;">Jane Smith</div> <div style="background-color: #e0e0e0; padding: 2px;">John Smith</div> </div> <div style="width: 5%; text-align: center;"> <input type="radio"/> Contact <input type="radio"/> Contact </div> </div> </div> <div style="display: flex; justify-content: space-between; align-items: center; margin-top: 5px;"> Primary Contact <input type="radio"/> </div>

4.2. Removing access rights

If you would like to remove a user's access rights, please follow steps 1-5 above, then:


6) Next to the Role name you would like to remove the access from, click on the green rubbish bin symbol next to the user's name.

7) Click "Save"

The user no longer have access rights to the role you removed them from.

Manage Roles:

Any change in the role of individuals made at the user's own initiative should be in accordance with the legal framework provisions on separation of functions and functional independence and the applicable management and control system description.

Role name	Role type	Context	Members
 Fund Operator	Programme		<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="width: 80%;"> <input type="text" value="Select user"/> </div> <div style="text-align: right;"> Primary Contact <input type="radio"/> </div> </div> <div style="border: 1px solid #ccc; padding: 2px;"> Add all <div style="display: flex; justify-content: space-between;"> <div style="width: 90%;"> <div style="background-color: #f0f0f0; padding: 2px;">Jane Smith</div> <div style="background-color: #e0e0e0; padding: 2px;">John Smith</div> </div> <div style="width: 5%; text-align: center;"> <input type="radio"/> Contact <input type="radio"/> Contact </div> </div> </div> <div style="display: flex; justify-content: space-between; align-items: center; margin-top: 5px;"> Primary Contact <input type="radio"/> </div>

4.3. Setting a new Primary Contact for a Role

The Primary Contact for a Role is the user who will get the task assigned to them and receive an email / notification that they have a task waiting for them in GrACE. The other colleagues in the same Role will be able to see this task in GrACE and can take over the task if necessary, from their dashboard, as explained in the beginning of the user manuals for the various tasks.


To set a new primary contact for a specific role, please follow steps 1-5 above, then:

6) Next to the Role name, click on the circle next to the user's name so that the blue dot appear next to the user name.

7) Click "Save"

Manage Roles:

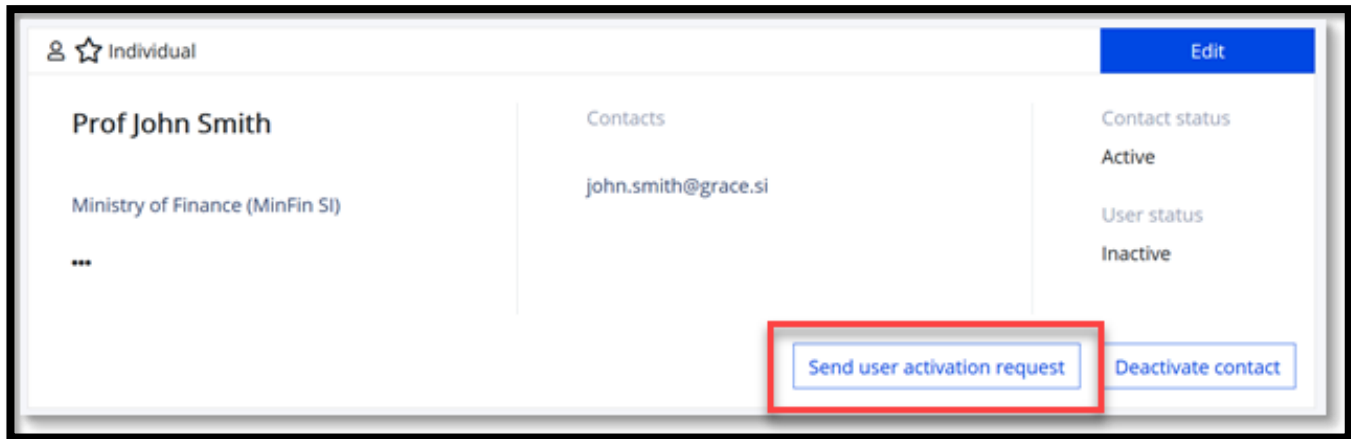
Any change in the role of individuals made at the user's own initiative should be in accordance with the legal framework provisions on separation of functions and functional independence and the applicable management and control system description.

Role name	Role type	Context	Members
 Fund Operator	Programme		<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="width: 80%;"> <input type="text" value="Select user"/> </div> <div style="text-align: right;"> Primary Contact <input checked="" type="radio"/> </div> </div> <div style="border: 1px solid #ccc; padding: 2px;"> Add all <div style="display: flex; justify-content: space-between;"> <div style="width: 90%;"> <div style="background-color: #f0f0f0; padding: 2px;">Jane Smith</div> <div style="background-color: #e0e0e0; padding: 2px;">John Smith</div> </div> <div style="width: 5%; text-align: center;"> <input type="radio"/> Contact <input type="radio"/> Contact </div> </div> </div> <div style="display: flex; justify-content: space-between; align-items: center; margin-top: 5px;"> Primary Contact <input type="radio"/> </div>

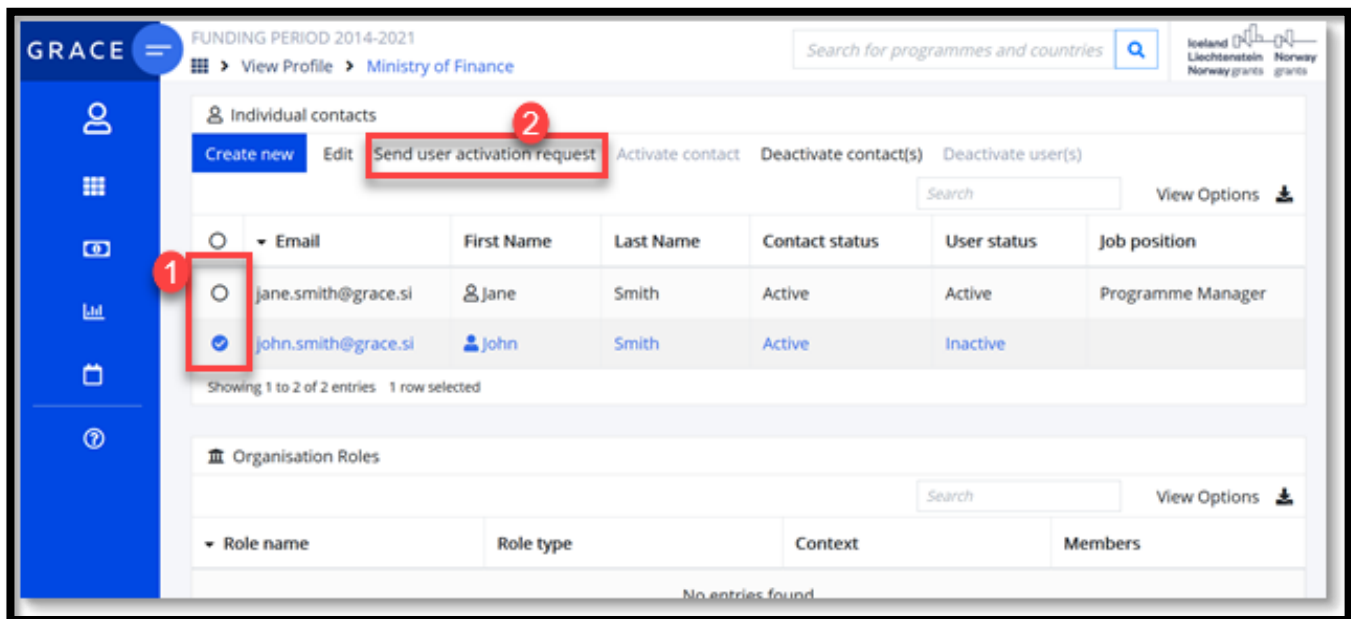
5. Requesting user activation

Following the creation of contacts, a user activation request must be sent to the FMO, before the contact will be able to login as a GrACE user. It is normally accepted by the FMO within a day or so.

This request can be sent individually for each contact directly from the user profile:



You can also send for multiple contacts at once:



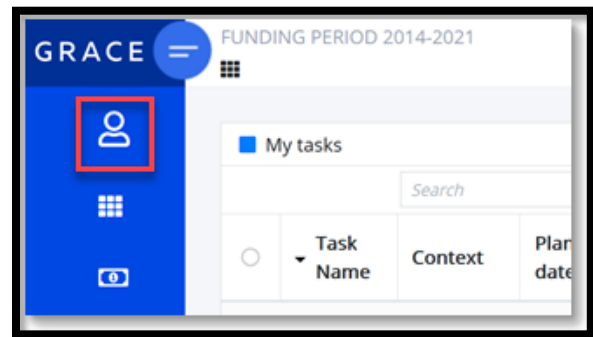
Once users are approved by the FMO, they will receive an automatic email from GrACE with instructions on how to create a personal password. After that the users can start enjoying GrACE!

6. Edit existing contacts from your organisation

You can edit at any point the information for your user profile or for other users from your organisation in GrACE to keep the contact details up to date.

Important: You can only edit the contacts from your organisation. If you notice that a contact from another organisation in your country must be updated, please inform grace.support@efta.int.

You can always edit your profile by accessing your profile then click **Edit**.



To edit other contacts from your organisation, go to your organisation page and on the **Individual contacts** section check the desired contact, then click **Edit**.

Individual contact 2

Create new Edit send user activation request Activate contact Deactivate contact(s) Deactivate user(s)

<input type="radio"/> 1 Email	First Name	Last Name	Contact status	User status	Job position
<input checked="" type="radio"/> User1@yourorganisation.com	Name1	Name1	Active	Active	State expert
<input type="radio"/> User2@yourorganisation.com	Name2	Name2	Active	Active	Head of Monitoring
<input type="radio"/> User3@yourorganisation.com	Name3	Name3	Active	Active	Head of Sector
<input type="radio"/> User4@yourorganisation.com	Name4	Name4	Active	Active	State expert
<input type="radio"/> User5@yourorganisation.com	Name5	Name5	Active	Active	Director,

After you will click **Edit**, you will be directed to the individual contact page. You can edit any of the fields except the organisation on this page.

Edit individual

* Title * First name * Last name

* Email Secondary email * Organisation

Job position Phone number Mobile number

After editing the contact details, you can click on

- **Save:** this will save the information and go out from edit mode
- **Save+continue:** this will save the information and allow you to continue editing the information for the contact

7. Deactivate contacts

If someone no longer should have access to your organisation, you can deactivate this person. In chapter 3 we explained the two types of accounts available in GrACE, namely **Contact** and **User**. Please refer to that chapter for further explanations of the two.

To deactivate, there are two options:

- **Deactivate user(s)**: If you would like to keep the person's details for administrative purposes, but they do not need to log into the system. The user will no longer be able to log into the GrACE system but will be visible as a contact in the organisation, like in an address book.
- **Deactivate contact(s)**: If the person has left the organisation, this option will both make the user hidden from the organisation and make them unable to login to the system. They will disappear from the list of users for the organisation.

The screenshot shows the 'Individual contacts' page in the GrACE system. The top navigation bar includes 'GRACE', 'FUNDING PERIOD 2014-2021', and 'View Profile > Ministry of Finance'. A search bar is present on the right. The main content area has a toolbar with buttons: 'Create new', 'Edit', 'Send user activation request', 'Activate contact', 'Deactivate contact(s)', and 'Deactivate user(s)'. Below the toolbar is a table of contacts. The first row is for 'jane.smith@grace.si' (Jane Smith, Active, Active, Programme Manager). The second row is for 'john.smith@grace.si' (John Smith, Active, Inactive). A red box highlights the 'Deactivate contact(s)' button, and another red box highlights the selection checkbox for the second contact. The page also shows 'Organisation Roles' below the contacts table.

Only active contacts are shown by default in the organisation's list. As soon as a contact is inactive, they will be hidden, however, you can click on **Show inactive contacts** to show them all.

This is a close-up of the 'Individual contacts' page toolbar. It shows the 'Create new' button and the 'Show inactive contacts' button, which is highlighted with a red box. Below the toolbar, the start of a table with an 'Email' column is visible.

A user or contact could always be re-activated again, if necessary, at a later stage. To do this, click on **Show inactive contacts** and then tick the box in front of the inactive user/contact and select

- **Activate contact** to make the user's details visible as an active contact in your organisation
- If the user (log in functionality) is inactive: **Send user activation request** to FMO

8. Manage Joint Committee for Bilateral Funds (JCBF) members (by NFP)

As a National Focal Point (NFP) user, you can edit the Joint Committee for Bilateral Funds (JCBF) from your country page. Open the Contacts tab, and you will see JCBF presented. Here, you can add users from your own organisation and FMO. You can also change the chairperson and remove members.

Note: you cannot see details for or add members from Donor organisations as this is maintained by the FMO.

Click on **Manage members**, then search for the existing GrACE contact you would like to add and select the person from the list. (If the contact does not show up, s/he might not be an existing contact in GrACE. Please create the contact first by following the steps explained earlier in this user manual.) Then, set the correct chairperson and the others as members. **Save** when finished.

The screenshots illustrate the process of managing JCBF members in the GrACE system:

- Step 1:** The user is on the 'Joint Committee for Bilateral Funds (JCBF)' page. The 'Manage members' button is highlighted with a red circle '1'.
- Step 2:** The user enters 'gra' into the 'Find user' search field, highlighted with a red circle '2'.
- Step 3:** The search results show 'Grace Admin' from 'Financial Mechanism Office (FMO BE)'. This entry is highlighted with a red circle '3'.
- Step 4:** The user selects 'Grace Admin' and opens the role dropdown menu. 'Chairperson' is selected, highlighted with a red circle '4'.
- Step 5:** The user clicks the 'Save' button to update the information, highlighted with a red circle '5'.

9. Manage Cooperation Committee members for a programme (by PO/FO)

If the programme has a Donor Programme Partner (DPP) or an International Partner Organisation (IPO), there will be a Cooperation Committee option from the Programme site. Here, the Programme Operator (PO) or Fund Operator (FO) can add and amend the roles of the committee members.

Note: Programme/Fund Operators will not be able to add contacts from the Donor organisations as this is maintained by the FMO.

Click on **Manage members**, then search for the existing GrACE contact you would like to add and select the person from the list. (If the contact does not show up, s/he might not be an existing contact in GrACE. Please create the contact first by following the steps explained earlier in this user manual.) Then, set the correct chairperson and the others as members. **Save** when finished.

Cooperation committee

Manage members 1

Search View Options

Name	Organisation name	Role
No entries found		
Showing 0 to 0 of 0 entries		

Search 3

Name	Organisation	Parent
Grace Admin	Financial Mechanism Office (FMO BE)	
GrACE Supplier	Financial Mechanism Office (FMO BE)	

Find user 2

Cancel Save

Cooperation committee

Members

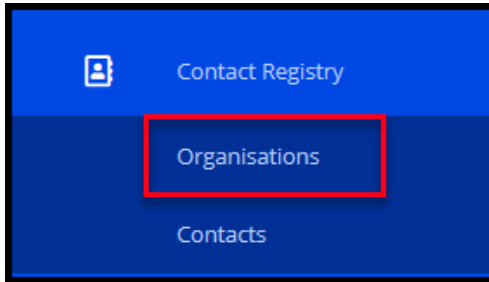
Grace Admin (Financial Mechanism Office (FMO BE))	Select role	Chairperson	
GrACE Supplier (Financial Mechanism Office (FMO BE))	Select role	Member 4	

Add user

Find user

Cancel Save 5

10. View Contacts Registry – Organisation



You can access the list of organisations stored in GrACE by going to **Contact Registry / Organisations** from the blue left side menu.

You will only see organisations from your country/programme (National Focal Point, Certifying Authority, Audit Authority, Irregularity Authority, Programme Operator, DPP and IPO) and FMO.

Note: FMO and Donors can see all the organisations stored in GrACE.

If you need to search for a specific organisation, you can type in its name (1) and click **Search** (2). By clicking on **Search Options** (3) you can do a more advanced search on multiple organisation related fields (e.g., search the organisation(s) involved in your programme(s) which have a DPP role from Iceland).

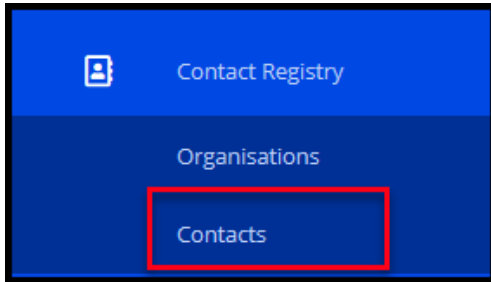
By clicking on **View Options**, you can add/remove further fields to this list (4). By clicking on the download symbol (5), you can export this list to Excel.

Name	Short name	Country	Organisation role(s)
Organisation 1		IPO Country	International Partner Orga ...)
Organisation 2		DPP Country	Donor Programme Partne
Organisation 3		Your country	Audit Authority
Organisation 4		DPP Country	Donor Programme Partne
Organisation 5		DPP Country	Donor Programme Partne

You might notice that in the organisation list above, there's a field Parent Organisation which is filled-in for some organisations. In this case the field Organisation Type is Organisation Unit instead of Organisation. This is the situation where different units/departments from the same organisation have different GrACE roles. In this case each was registered as a separate entry and all entries have the same Parent Organisation.

Important: In case of any changes occurring for your organisation (or for another organisation from your country) such as a name change, location change etc, please inform grace.support@efta.int to apply the change in GrACE.

11. View Contacts Registry – Contacts



You can access the list of organisations stored in GrACE by going to **Contact Registry / Contacts** from the blue left side menu.

You will only see the contacts from the organisations from your country/programme (National Focal Point, Certifying Authority, Audit Authority, Irregularity Authority, Programme Operator, DPP and IPO) and FMO.

Note: FMO and Donors can see all the contacts and organisations stored in GrACE.

If you need to search for a specific person, you can type in the person's name (1) and click **Search** (2). By clicking on **Search Options** (3) you can do a more advanced search on multiple contact-related fields (e.g., search for persons in a specific organisation or with a specific organisation role).

By clicking on **View Options**, you can add/remove further fields to this list (4). By clicking on the download symbol (5), you can export this list to Excel.

The screenshot shows a search results page with a table of contacts. Red circles 1-5 highlight specific UI elements: 1. Search input field, 2. Search button, 3. Search Options button, 4. View Options button, and 5. Download icon.

	Email	First Name	Last Name	Contact status	User status	Job position	Organisation	Individual role(s)
<input type="radio"/>	Contact 1			Active	Active		Financial Mechanism Office (FMO BE)	
<input type="radio"/>	Contact 2			Active	Active		Financial Mechanism Office (FMO BE)	
<input type="radio"/>	Contact 3			Active	Active		Financial Mechanism Office (FMO BE)	