

# Self-service Data Analysis

## GrACE User Manual for external users

Version 4.0, March 2023

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## 1. Introduction

This document aims to instruct GrACE users on how to use Self-Service Data Analysis (SSDA).

For further help and support, please contact [grace.support@efta.int](mailto: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. What is self-service data analysis?

Self-service data analysis (SSDA) allows all GrACE users to perform their own analysis of data stored in GrACE. The functionality allows users to make customised and refreshable tables, charts, export and share with other users, etc.

The data presented through self-service data analysis is always up to date<sup>1</sup>. Because of this, SSDA is a useful tool for quality assuring data: it displays exactly what is stored in the system. If you notice something is missing or incorrect, please notify the person responsible for the data in question (for example the Programme/Fund Operator in the case of calls or projects).

The amount of information a user can analyse depends on the user's general access permissions:

- Programme Operators and Fund Operators have access to their respective programmes.
- National Focal Points, Irregularity Authorities, Audit Authorities and Certifying Authorities have access to the programmes in their respective country (excluding Active Citizens Funds).
- Programme Partners have access to all countries and programmes where they act as a partner.
- Donors have access to all countries and programmes.

The following data sources are available:

| Theme      | Data source                            | Description   | Who can see this data source? |
|------------|--|---|-------------------------------|
| Contacts   | Organisations                          | All organisations and their contact details   | Donors/DPPs                   |
| Contacts   | Roles in programmes/projects           | This set contains a list of all organisations and their roles per programme or project                              | Donors/DPPs                   |
| Finance    | Forecasts                              | This set contains a list of all forecasts per programme   | All users                     |
| Finance    | Payments                               | All payments in time (including payments to DPP, IPO, DS travel costs etc)  | All users                     |
| Finance    | Payments and payment dates             | All payments per budget heading in time   | All users                     |
| Finance    | Programme payments and budget headings | Programme funding per outcome (or other budget heading) to date   | All users                     |
| Finance    | Workplans                              | This set contains a list of all yearly workplans per programme  | Donors/DPPs                   |
| Grants     | Countries                              | Countries and related financial aggregates (filter by country type to see only Beneficiary States)                  | Donors                        |
| Grants     | Priority sectors                       | Priority sectors and related financial aggregates   | All users                     |
| Grants     | Financial mechanisms                   | Financial mechanisms and related financial aggregates   | All users                     |
| Grants     | Programme areas                        | Programme areas and related financial aggregates  | All users                     |
| Programmes | Bilateral initiatives                  | Bilateral initiatives information and related financial aggregates  | All users                     |
| Programmes | Calls                                  | Calls and related information   | All users                     |
| Programmes | Programmes                             | Programmes and funds and related financial aggregates   | All users                     |
| Programmes | Project target groups                  | This set contains a list of all target groups and related projects  | All users                     |
| Programmes | Projects                               | Projects level information and related financial aggregates   | All users                     |
| Programmes | Risk Assessment                        | This set contains a list of all risk assessments per programme  | All users                     |
| Results    | Achievement progress                   | This set contains results frameworks and achievements in time per programme (also core/common indicators available) | All users                     |

<sup>1</sup> More precisely, the users can experience a maximum lag of 15 min between when information is registered or modified on other GrACE sections before they should see it reflected in SSDA.

|         |                            |   |           |
|---------|----------------------------|---|-----------|
| Results | Results framework          | Results frameworks and achievements to date per programme (also core/common indicators available)                           | All users |
| Results | Results per disaggregation | This set contains achievements for those indicators, which have a disaggregation, per programme and disaggregation category | All users |

To see a list of available fields in each data source, please see chapter 5.

### 3. How to use self-service data analysis?

By using self-service data analysis, a GrACE user can:

- Create a new analysis using the provided data sources
  - One analysis can contain several visualisations (graphs or tables)
- View up-to-date results of existing data analysis reports
- Make their own “clone” of a data analysis shared with them by someone else<sup>2</sup>
- Modify their data analyses (i.e., those created or cloned by themselves)
- Save, export, and share a data analysis with other users<sup>3</sup>

#### TIP FOR EXCEL USERS

The GrACE self-service data analysis functionality follows to a large extent a similar logic as [Excel pivot tables](#).

#### REPORTING SUPPORT

If you have any questions or wish to make sure your analysis is correct, please contact **GrACE support** on [grace.support@efta.int](mailto:grace.support@efta.int) and mention the word *analytics* in the subject.

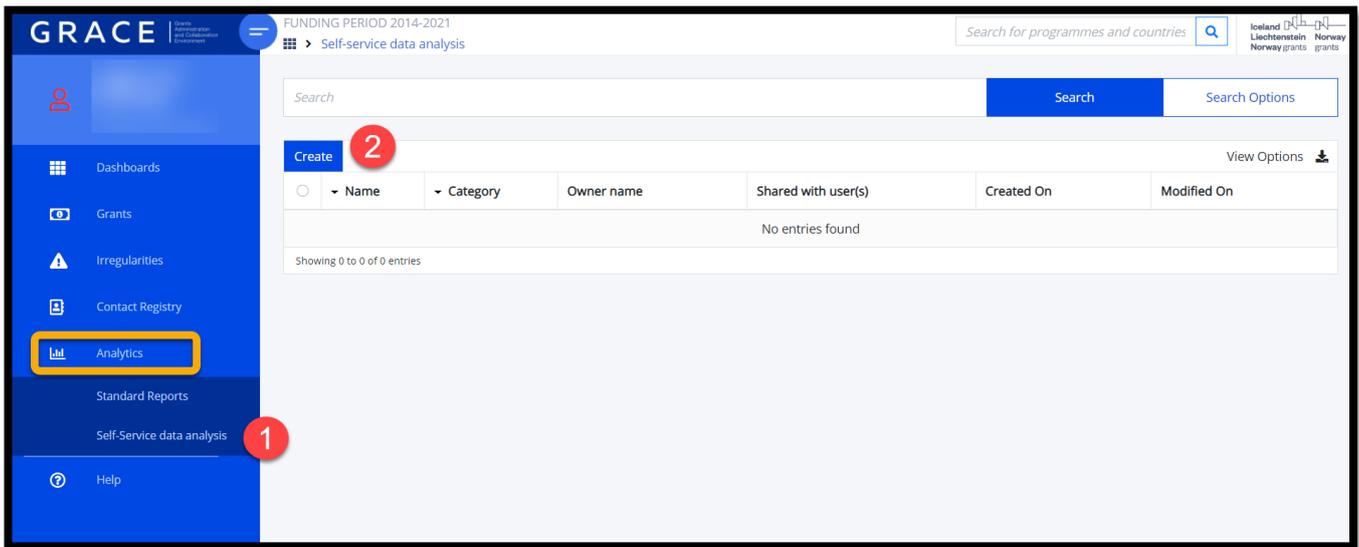
### 3.1. Create a new data analysis

Open self-service data analysis by

- Navigating from the main menu **Analytics > Self-service data analysis** (1). A page is opened, where the user can create an analysis.
- When clicking **Create** (2), a new page opens, where the user can define the analysis content.

<sup>2</sup> Similar to “save as” in MS Office tools.

<sup>3</sup> External users will only see what is available for them according to their access rights, also when a report is shared with them through GrACE.

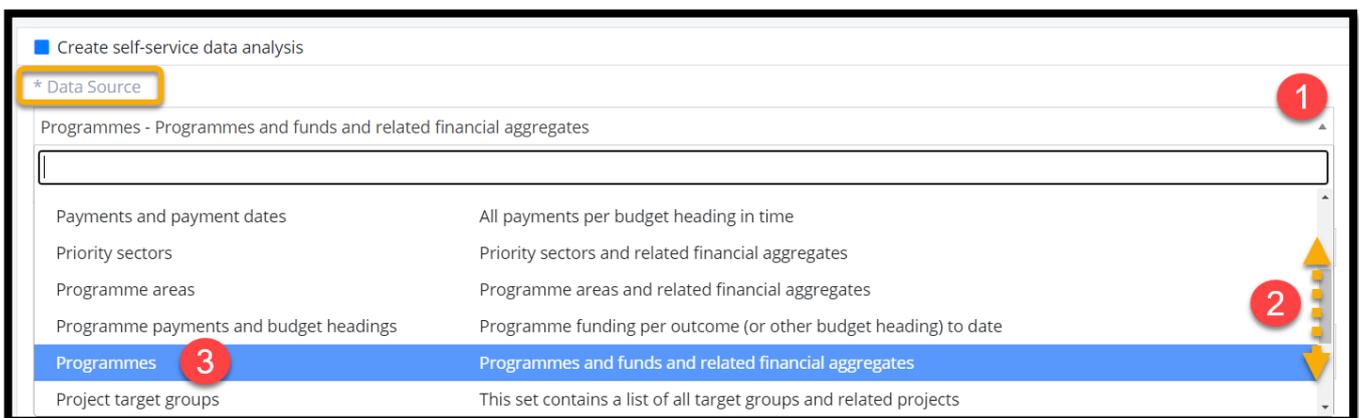


The user can choose to add several visualisations in the same analysis. The following sections instruct you on how to build your analysis, for example:

- Choose a data source
- Choose which fields to present and how
- Add a title and description to each visualisation, to document what is presented in the table/graph.

### 3.2. Choose a data source

The user is asked to select a data source from a collection of tables (1-2-3). On the left you see the name of a data source (here: *Programmes*) and on the right its description (here: *Programmes and funds and related financial aggregates*).



### 3.3. Set up your visualisation

Once a data source is selected, the tool will present a default table setup for that specific source. The user will then make the desired changes by for example

- (1) Selecting whether to present the data in a grid or a chart
- (2) Selecting one of the icons on the right to customise
  - i. choosing different fields and how to use them (Fields)
  - ii. the values presented (Format)
  - iii. the layout of a grid (Options)

| PROGRAMME SHORT NAME | Total Sum of Grant per Programme |
|----------------------|----------------------------------|
| BG-ACTIVECITIZENS    | 15 500 000                       |
| BG-BF                | 4 202 000                        |
| BG-CULTURE           | 10 000 000                       |
| BG-DECENTWORK        | 951 000                          |
| BG-ENERGY            | 28 000 000                       |
| BG-ENVIRONMENT       | 13 000 000                       |
| BG-HOMEAFFAIRS       | 21 500 000                       |
| BG-INNOVATION        | 28 500 000                       |
| BG-JUSTICE           | 30 000 000                       |

By opening the **Fields** menu (1), the user can

- Select the fields to be shown on the visualisation (2-3).
- Arrange the fields in rows or columns (4).
- Add a calculated field (5) (see section 3.6 for more on this)
- Click **Apply** (6) to see the current preview of the report.

Once the analysis is done, give it a title and description to clarify what the analysis shows (1). You can also continue to add a new table/chart by clicking the button at the bottom (2).

When using a **compact or classic** layout option you may expand (3) a label to show the following field (in this case we've grouped the programmes by Host Programme Area). When using the **flat form** layout option, you are always shown the full list of data you've selected. See section 3.6 for instructions on how to change the layout.

Create self-service data analysis

\* Data Source  
Programmes - Programmes and funds and related financial aggregates

Title

Note

Export Grid Charts

Format Options Fields Fullscreen

| 1  | 2                    | 3                                | 4                                      | 5   | 6                      | 7 | 8 | 9 | 10 |
|----|----------------------|----------------------------------|--|---|------------------------|---|---|---|----|
| 1  | HOST PROGRAMME AREA  |                                  |  |   |                        |   |   |   |    |
| 2  | PROGRAMME SHORT NAME | Total Sum of Grant per Programme | Total Sum of Grant (EEA) per Programme | Total Sum of Grant (Norway) per Programme | Total Sum of Disbursed |   |   |   |    |
| 4  | GFRC                 | 29 283 041.99                    | 16 178 880.72                          | 13 104 161.27                             | 156 000                |   |   |   |    |
| 5  | GFYE                 | 46 233 279                       | 25 543 886.64                          | 20 689 392.36                             | 18 248 397.16          |   |   |   |    |
| 6  | PA01                 | 309 500 000                      | 90 500 000                             | 219 000 000                               | 20 599 480.43          |   |   |   |    |
| 7  | PA02                 | 211 600 000                      | 64 600 000                             | 147 000 000                               | 32 090 319.14          |   |   |   |    |
| 8  | PA03                 | 52 000 000                       | 40 000 000                             | 12 000 000                                | 18 140 626.21          |   |   |   |    |
| 9  | CZ-EDUCATION         | 6 500 000                        | 6 500 000                              |   | 2 939 923.24           |   |   |   |    |
| 10 | PL-EDUCATION         | 20 000 000                       | 20 000 000                             |   | 5 050 863.11           |   |   |   |    |
| 11 | RO-EDUCATION         | 12 000 000                       | 12 000 000                             |   | 6 409 655.41           |   |   |   |    |
| 12 | SI-EDUCATION         | 13 500 000                       | 1 500 000                              | 12 000 000                                | 3 740 184.45           |   |   |   |    |
| 13 | PA04                 | 6 000 000                        | 6 000 000                              |   | 2 031 381.85           |   |   |   |    |
| 14 | PA05                 | 28 792 860                       |  | 28 792 860                                | 6 670 360              |   |   |   |    |

Add new table/chart

Cancel Save

### 3.4. Formatting numerical values

This section describes how to format a value field as percentage or euros, adjust decimals etc. First set up your fields as described in section 3.3. Then click on the **Format** icon (1) and select **Format cells**.

Create self-service data analysis

\* Data Source  
Programmes - Programmes and funds and related financial aggregates

Title

Note

Export Grid Charts

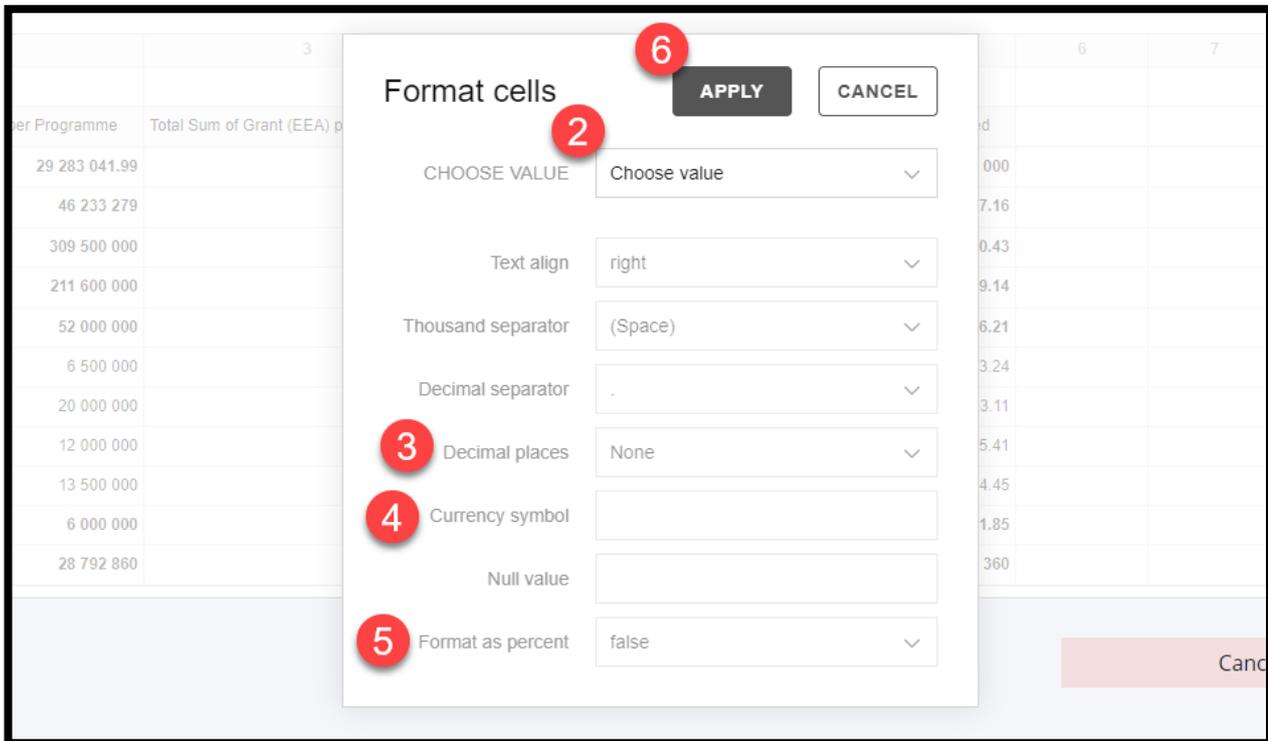
Format Options Fields Fullscreen

| 1 | 2                    | 3                                | 4                                      | 5   | 6                      | 7 | 8 | 9 | 10 |
|---|----------------------|----------------------------------|--|---|------------------------|---|---|---|----|
| 1 | HOST PROGRAMME AREA  |                                  |  |   |                        |   |   |   |    |
| 2 | PROGRAMME SHORT NAME | Total Sum of Grant per Programme | Total Sum of Grant (EEA) per Programme | Total Sum of Grant (Norway) per Programme | Total Sum of Disbursed |   |   |   |    |
| 4 | GFRC                 | 29 283 041.99                    | 16 178 880.72                          | 13 104 161.27                             | 156 000                |   |   |   |    |
| 5 | GFYE                 | 46 233 279                       | 25 543 886.64                          | 20 689 392.36                             | 18 248 397.16          |   |   |   |    |
| 6 | PA01                 | 309 500 000                      | 90 500 000                             | 219 000 000                               | 20 599 480.43          |   |   |   |    |
| 7 | PA02                 | 211 600 000                      | 64 600 000                             | 147 000 000                               | 32 090 319.14          |   |   |   |    |
| 8 | PA03                 | 52 000 000                       | 40 000 000                             | 12 000 000                                | 18 140 626.21          |   |   |   |    |

A popup window appears, where you can for example:

- Choose the field to format (2)
- Choose how many decimal places to show (3)
  - Here **None** means no selection. Choose 0 if you don't want to show decimals
- Add your own currency symbol (for example €) (4)
- Format as percent (5)

- Click **Apply** to make the changes visible in your analysis (6)

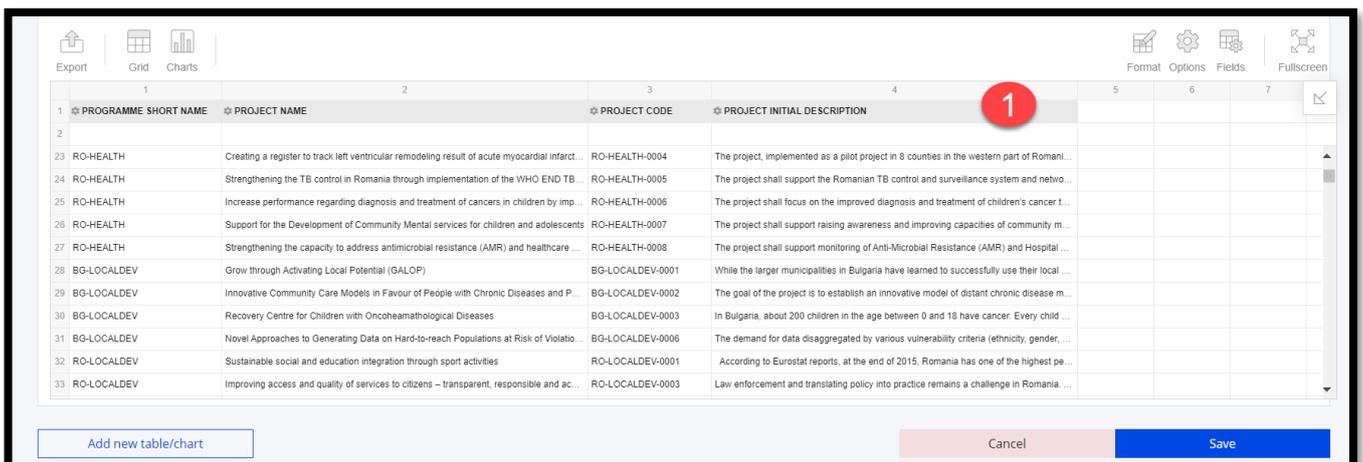


You can also change your visualisation to a graph and keep the selected number formatting.

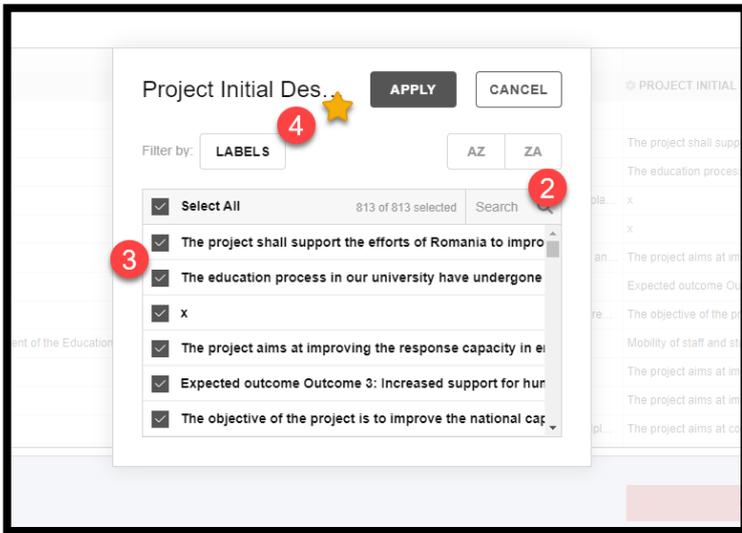
### 3.5. Filtering

In a grid view, any visible field name can be used to filter the information. Graphs can be filtered using the same principle. Here's a way to search for projects where the initial project description mentions "air quality".

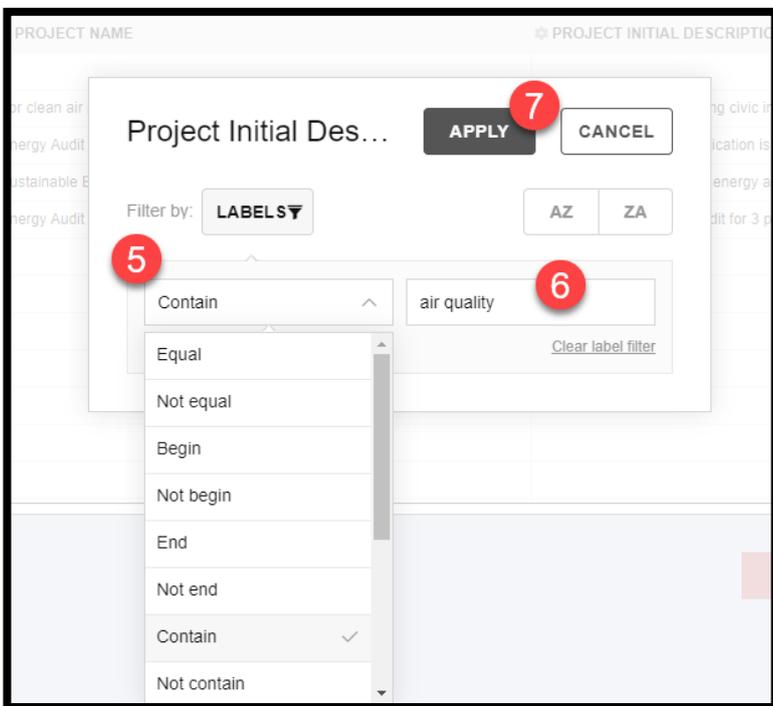
- In the flat grid (selecting fields is described in section 3.3), click on the title (1)



- A pop-up window appears, where you can either
  - search for specific words (2),
  - manually select the descriptions you want to include (3),
  - or click on the button **Labels** (4) to create a rule for filtering project descriptions
    - this will automatically include any new projects which fit the condition



- If you click on **Labels**, a new pop-up will open where you can determine your filtering condition. In this example we want to show only those projects, where the description mentions (contains) the keyword “air quality”.
  - Select a suitable filtering operator (5)
  - Define the keyword (6)
  - Click **Apply** (7)
  - A filter symbol on the description title indicates that this field is being filtered (8).



| 4  | 5 | 6 |
|--|---|---|
| ✱ PROJECT INITIAL DESCRIPTION  |   |   |
| The project aims at boosting civic involvement, stimulating initiative and volunteering, ...         |   |   |
| building The propose with this application is to receive support in undertaking an energy audit f... |   |   |
| gs Support in undertaking an energy audit for 2 public buildings belonging to Tárnáveni M...         |   |   |
| o Turda Undertaking an energy audit for 2 public blocks of buildings belonging to Turda Municipi     |   |   |

### 3.6. Grid layout options

GrACE offers three alternative grid layout options. The first two can be used to summarise data, whereas the last one shows all possible rows in the selection:

- Compact
- Classic
- Flat

Here are the steps for changing the grid layout from flat to compact or classic:

- Click **Options** (1)
- in the popup window choose either compact or classic layout (2) and click **Apply** (3)

| 1                    | 2  | 3                   | 4  | 5 | 6 | 7 |
|----------------------|--|---------------------|--|---|---|---|
| PROGRAMME SHORT NAME | PROJECT NAME                                   | PROJECT CODE        | PROJECT INITIAL DESCRIPTION  |   |   |   |
| RO-HOMEAFFAIRS       | Improving national asylum and migration system | RO-HOMEAFFAIRS-0001 | The project shall support the efforts of Romania to improve the response capacity in th... |   |   |   |
| RO EDUCATION         | 18-1108-0013 - Mobile-Resilient                | RO EDUCATION-0059   | The education process in our country has undergone a deep transformation due to t...       |   |   |   |

Layout options

GRAND TOTALS

Do not show grand totals

Show grand totals

Show for rows only

Show for columns only

SUBTOTALS

Do not show subtotals

Show subtotals

Show subtotal rows only

Show subtotal columns only

LAYOUT

Compact form

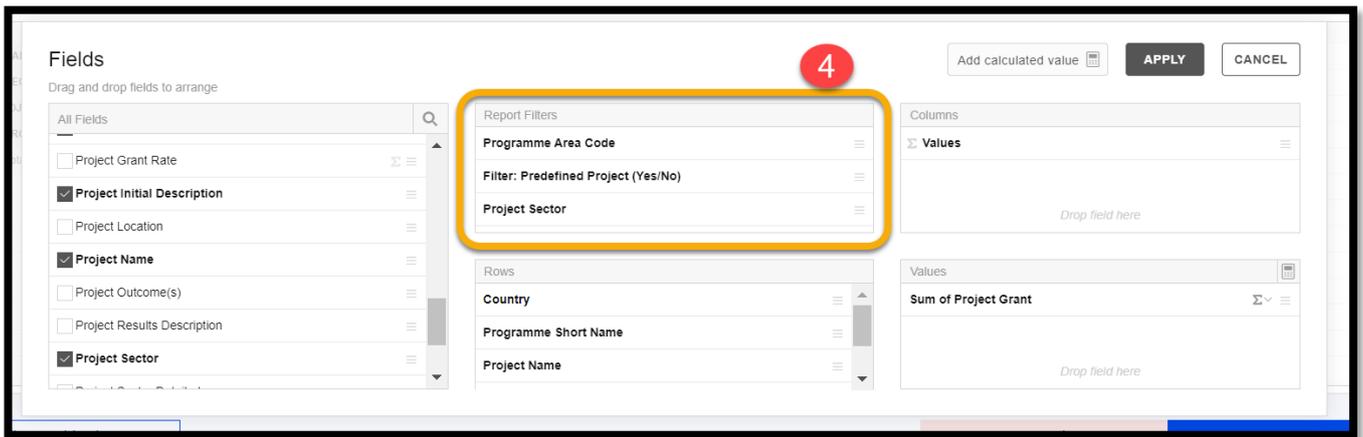
Classic form

Flat form

APPLY CANCEL

If you are using compact or classic layout and wish to **filter by a field but to not present it in the grid**, you can

- Open Fields and choose the fields you wish to filter by (4), then click **Apply**. The report filter buttons will now be visible above your visualisation, and you can click on them to choose the values you would like to show.



### 3.7. Aggregation functions

Self-service allows the user to flexibly summarize results using the functions listed below. **Count** functions can be used especially for text fields, to find out the number of instances in your selection:

- Count (calculates the number of values e.g., number of countries)
- Distinct Count (calculates the number of individual values)

The other functions are for numerical values only:

- Sum
- Average
- Median
- Product
- Min
- Max
- % of Grand Total
- % of Column
- % of Row
- Index
- Difference
- % Difference
- Population StDev (Population standard deviation)
- Sample StDev (Sample standard deviation)
- Running Totals

To make changes to your calculations, you can navigate through either

- Fields (1) and then click on the sum symbol  $\Sigma$  next to your value field (2)
- Add a calculated value, where you can configure your own custom calculation (3)
  - for example: (disbursed amount / programme grant) = disbursed rate %

### 3.8. Save, Share, and Export

#### Save

Once you've finished your analysis, you should give it a **Title** (1) and description in the section **Note** (2). Click **Save** (3) at the bottom of the page.

**Title**

How many programmes do we have in implementation at the moment.

**Note**

Below you can see the number of programmes per **Programme status**. Click on a status to see the programmes in question.

*This table excludes*

- Bilateral Funds
- Technical assistance
- Country level Social Dialogue - Decent Work programmes (instead, it counts Social Dialogue - Decent Work as one programme, 'SDDW')

| PROGRAMME STATUS                | Total Sum of Grant per Programme | Number of programmes |
|---------------------------------|----------------------------------|----------------------|
| Programme implementation        | € 2 050 245 380.99               | 89                   |
| Programme agreement preparation | € 120 000 000                    | 4                    |
| MoU signed                      | € 24 500 000                     | 2                    |
| Programme approved              | € 17 500 000                     | 2                    |
| <b>Grand Total</b>              | <b>€ 2 212 245 380.99</b>        | <b>97</b>            |

Buttons: Add new table/chart, Cancel, Save

\* Name: Example analysis: Programmes per status

Category: Examples for FMO

Description: This analysis shows

Keywords:

OK Cancel

The tool now asks you to the following information in a pop-up window:

- **Name:** Here you give a name for the whole analysis (this is common for all the tables and graphs you added in the analysis)
- **Category:** Optional, to help keep your analyses organised
- **Description of the analysis:** Here you give a description for the whole analysis (this is common for all the tables and graphs you added in the analysis)
- **Keywords:** Optional, to help you search for different themes

Then click **OK** to finish saving. By default, the analysis is only visible to the user who created it – next you can see how to make it visible to others.

## Share

Once you have created an analysis, you can share it with other GrACE users. Please be mindful to share your analysis with only those users to whom it is relevant.

- After saving your analysis, click on **Share** (1)
- A pop-up window appears, where you can share the analysis by user group or name (2).
- Remember to **Save** (3) at the end.

Example analysis: Programmes

This analysis presents example summaries of data stored in GrACE. The information is updated whenever this report is opened (maximum lag is 15 minutes).

If you have questions on how to use self-service, please see user manual: (url coming)

Katarina Pentti

Modify analysis Delete Clone Share

Self-service data analysis

How many programmes do we have in implementation at the moment?

Data source: Programmes

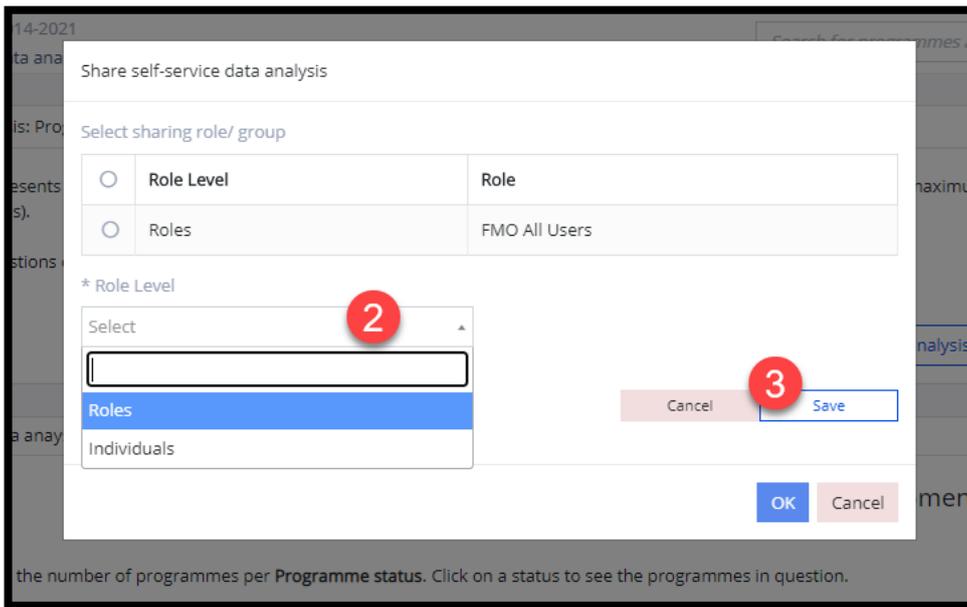
Below you can see the number of programmes per **Programme status**. Click on a status to see the programmes in question.

This table excludes

- Bilateral Funds
- Technical assistance
- Country level Social Dialogue - Decent Work programmes (instead, it counts Social Dialogue - Decent Work as one programme, SDDW)

Export Grid Charts Fullscreen

|                                   | 1                                | 2 | 3                    | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|-----------------------------------|----------------------------------|---|----------------------|---|---|---|---|---|---|----|
| 1 PROGRAMME STATUS                |                                  |   |                      |   |   |   |   |   |   |    |
| 2 PROGRAMME SHORT NAME            | Total Sum of Grant per Programme |   | Number of programmes |   |   |   |   |   |   |    |
| 3 Programme implementation        | € 2 050 245 380.99               |   | 89                   |   |   |   |   |   |   |    |
| 4 Programme agreement preparation | € 120 000 000                    |   | 4                    |   |   |   |   |   |   |    |
| 5 MoU signed                      | € 24 500 000                     |   | 2                    |   |   |   |   |   |   |    |

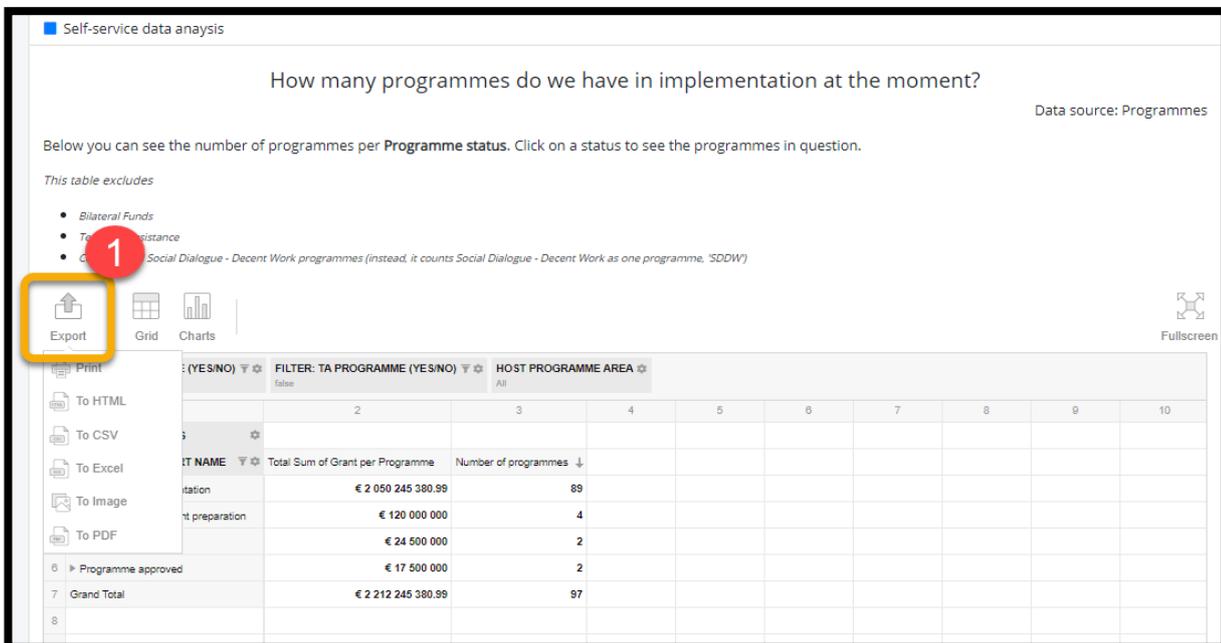


The other users will only see what is visible to them according to their user access, for example a Programme Operator will only see information related to their own programme.

## Export

You can always export the data visible in your analysis by clicking on the **Export** icon (1). It is also possible to retain the visual look by exporting in .pdf or .png format.

Please note that if you wish to export all the selected data to Excel, selecting a flat layout works best (see section 3.5).



## REPORTING TIP

Exporting your visualisation to Excel will not allow you to keep any formatting you have put in place in GrACE. If you would like to use Excel as your reporting platform, but using data from self-service data analysis, you could design your process for example like this:

1. Save a self-service data analysis with only the raw data selections (recommendation: flat layout grid)
2. Build your report in Excel (for example with [a pivot table](#))
3. Whenever an update is needed, retrieve the data from Self-service to refresh your report in Excel.

### 3.9. Clone & Modify

Once you have created and saved an analysis, you can always go back and make changes to it by clicking on **Modify analysis** (1).

You can also choose to **Clone** (2) the analysis, if you either want to:

- a. Use an analysis **created by someone else** as a basis for your own analysis
- b. Use an analysis **created by yourself** as a basis for your analysis (but keeping the current version as it is)

To summarise: **Modify analysis** makes changes to the current analysis (and is only available in analyses you have created yourself), **Clone** creates a copy of the current analysis.

The screenshot shows the GrACE interface. At the top, there is a search bar and navigation links. The main content area displays an analysis titled 'Example analysis: Programmes & Projects'. Below the title, there is a description of the analysis and a user name 'Katriina Pentti'. Two buttons are highlighted with red circles and numbered 1 and 2: 'Modify analysis' (1) and 'Clone' (2). Below this, there is a section for 'Self-service data analysis' with a question 'How many projects have been signed to date?' and a data source of 'Projects'.

### 3.10. Advanced: join data sources

Self-service data analysis allows users to combine information from several data sources in one visualisation by joining them (left join). Using this feature **requires a good understanding of the relevant data and its structure**. Please don't hesitate to ask for help from the FMO Reporting and Data Quality Officer to get started. Here are the technical steps for joining data sources:

- Choose one of the data sources you want to use, then click the link icon (1).
- Select the second data source (2), which should be joined with the first.
- Choose which field to join by from the drop-down list (3) (here *Project Code* is the most accurate level).

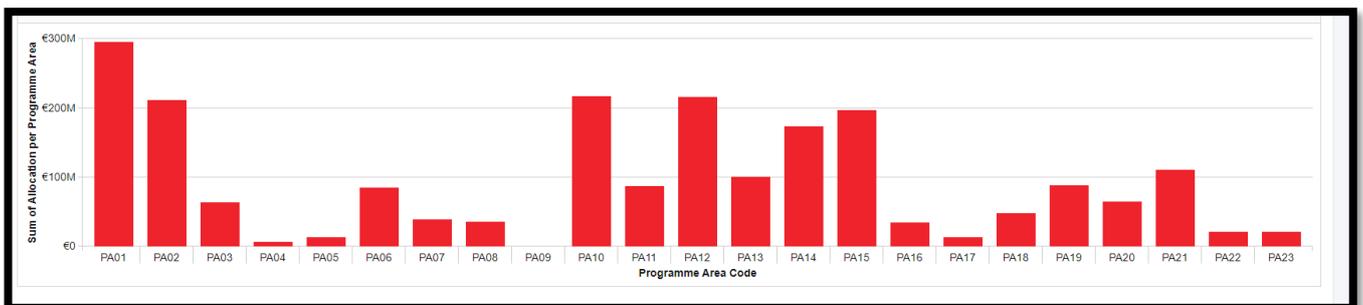
The full list of fields/columns is grouped by table. The **different data sources may have fields/columns with the same meaning**. To continue to set up your analysis:

- Click **Fields** (4) to configure the rows and the columns for the report.
- Expand (5) the fields of the DataMart tables to select the needed ones for the report.
- When your selection is ready, click **Apply** (6).

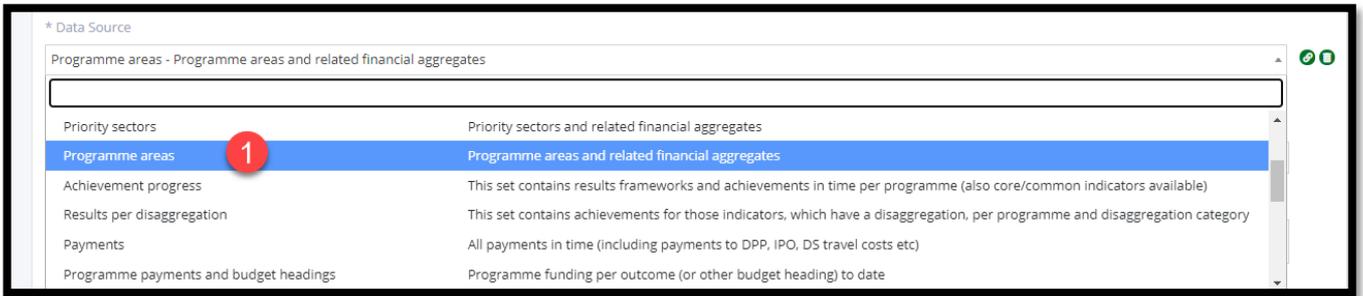
**Note:** More data sources could be selected and joined via the link icon (1).

#### 4. Example analysis – Programme area allocation

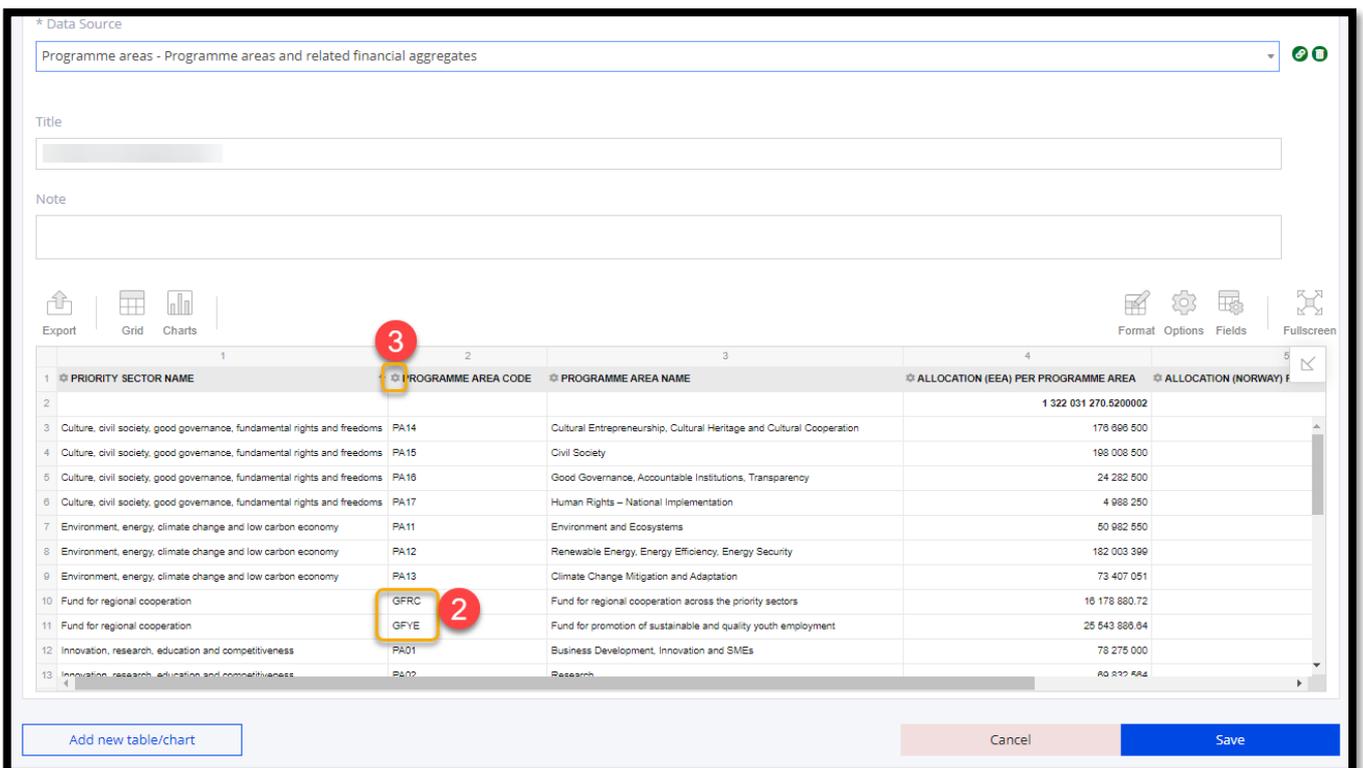
Below you can see the steps needed for producing this example visualisation, which illustrates how funding in the entire EEA & Norway Grants Financial Mechanism 14-21 is allocated to different Programme Areas:



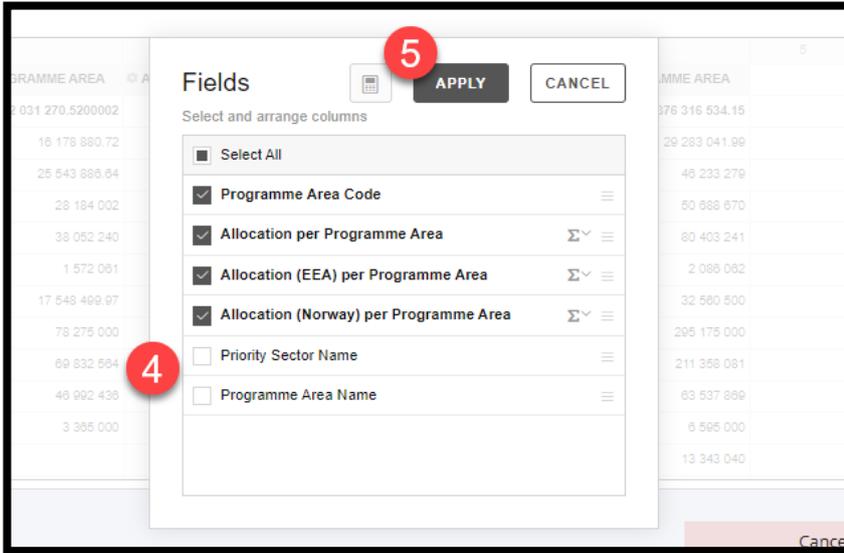
- Choose **Programme areas** (1) as the data source. A default grid selection opens (flat layout in this case).



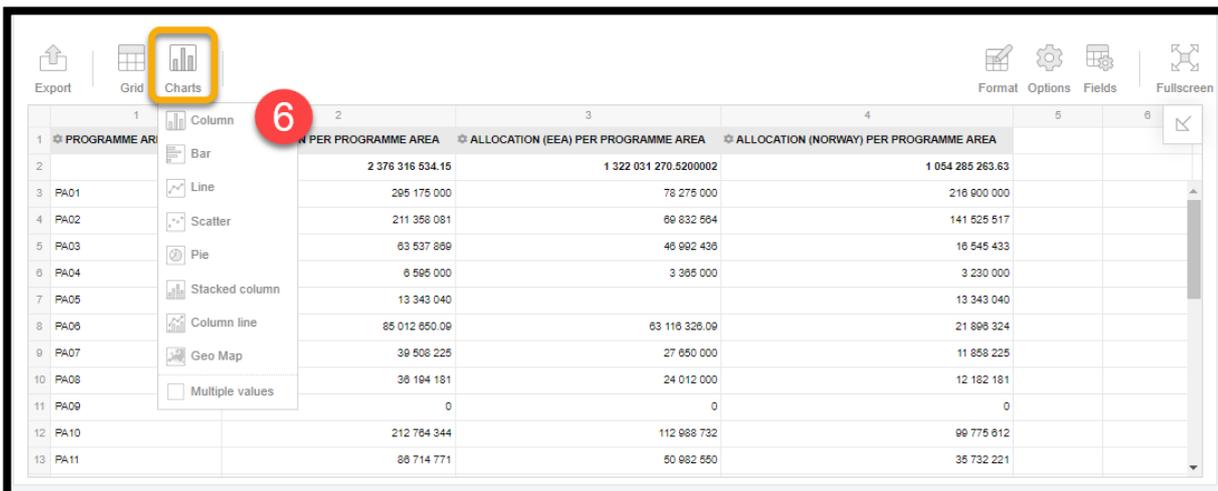
- Some programmes don't fit well into the Programme Area classification (for example Regional Funds). You might want to filter out the **Other categories** (2) by clicking on the gear symbol (3) and selecting only those which start with PA.



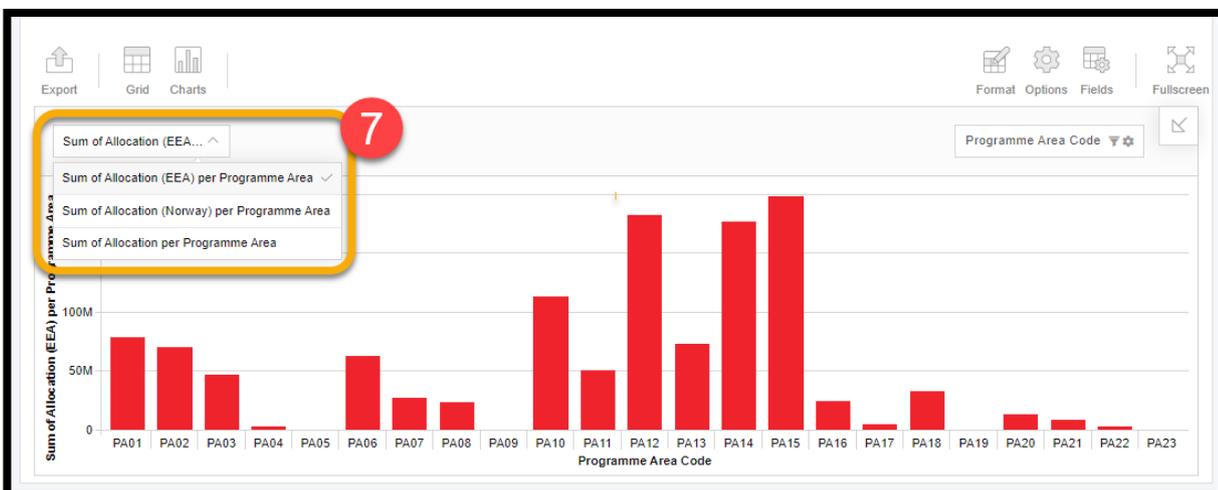
- Choose how to present your data – for example you can deselect the fields **Priority Sector Name** and **Programme Area Name** (4). You can also grab and drag the fields to rearrange them as you like. When you're done, click **Apply** (5).



- Choose for example column plot from the graph selection (6).



- Because we have all three options of financial mechanism (FM) selected in the Fields (EEA, Norway, Total), you can use the drop-down button above the graph to choose which one you want to show (7).



## 5. Available information by theme and data source

In this section we provide detailed information on the information available through self-service data analysis. For each data source you can find a table listing all the available fields and how to best use them. The data sources are grouped by themes in this order:

1. Contacts
2. Finance
3. Grants
4. Programmes
5. Results

### 5.1. Theme: Contacts

#### 5.1.1. Data source: Organisations

| Field name                           | Can be used in rows / columns | Can be used as a value | Can be used as a filter | Note   |
|--------------------------------------|-------------------------------|------------------------|-------------------------|--|
| Address                              | x                             |                        |                         |  |
| City                                 | x                             |                        | x                       |  |
| Country                              | x                             |                        | x                       |  |
| District                             | x                             |                        | x                       |  |
| District code                        | x                             |                        | x                       |  |
| Email address                        | x                             |                        |                         |  |
| Fax                                  | x                             |                        |                         |  |
| Filter: Active organisation (Yes/No) | x                             |                        |                         |  |
| Organisation                         | x                             | x                      | x                       | When used as a value (count or distinct count) you get the number of organisations in your selection |
| Organisation classification          | x                             |                        | x                       |  |
| Organisation classification sector   | x                             |                        | x                       |  |
| Organisation local name              | x                             |                        | x                       |  |
| Organisation type                    | x                             |                        | x                       |  |
| Phone                                | x                             |                        |                         |  |
| Postal code                          | x                             |                        | x                       |  |
| Website                              | x                             |                        |                         |  |

## 5.1.2. Data source: Roles in programmes/projects

| Field name                            | Can be used in rows / columns | Can be used as a value | Can be used as a filter | Note   |
|---------------------------------------|-------------------------------|------------------------|-------------------------|--|
| Country                               | x                             |                        | x                       |  |
| Estimated amount                      |                               |                        |                         |  |
| Filter: Project organisation (Yes/No) |                               |                        | x                       |  |
| Organisation                          | x                             |                        | x                       |  |
| Organisation classification           | x                             |                        | x                       |  |
| Organisation classification sector    | x                             |                        | x                       |  |
| Organisation country                  | x                             |                        | x                       |  |
| Organisation role                     | x                             | x                      | x                       | When used as a value (distinct count) you get the number of organisation roles in your selection |
| Organisation role acronym             | x                             |                        | x                       |  |
| Organisation role e-mail              | x                             |                        | x                       |  |
| Programme short name                  | x                             |                        | x                       |  |
| Project code                          | x                             |                        | x                       |  |
| Project title                         | x                             |                        | x                       |  |

## 5.2. Theme: Finance

### 5.2.1. Data source: Forecasts

**Note:** This data source presents forecasts which FMO receives from the Certifying Authority.

The forecasts reported to Donors by the FMO are stored outside GrACE for the moment.

| Field name                       | Can be used in rows / columns | Can be used as a value | Can be used as a filter | Note   |
|----------------------------------|-------------------------------|------------------------|-------------------------|--|
| Country                          | x                             |                        | x                       |  |
| Document submission month        | x                             |                        | x                       |  |
| Document submission year         | x                             |                        | x                       |  |
| Filter: Latest forecast (Yes/No) |                               | x                      |                         |  |
| Forecast document name           | x                             | x                      | x                       | When used as a value (distinct count) you get the number of forecast documents in your selection |
| Forecast status                  | x                             |                        | x                       |  |
| Forecasted amount (EEA)          |                               | x                      |                         |  |
| Forecasted amount (Norway)       |                               | x                      |                         |  |
| Forecasted amount total          |                               | x                      |                         |  |
| Forecasted year                  | x                             |                        | x                       |  |
| Programme short name             | x                             |                        | x                       |  |

## 5.2.2. Data source: Payments

| Field name                                    | Can be used in rows / columns / filter | Can be used as a value | Note   |
|---|--|------------------------|--|
| Amount to be approved                         |  | x                      |  |
| Amount to be approved (co-financing)          |  | x                      |  |
| Amount to be approved (EEA)                   |  | x                      |  |
| Amount to be approved (Norway)                |  | x                      |  |
| Beneficiary type                              | x                                      |                        |  |
| BTO reference                                 | x                                      |                        |  |
| Country                                       | x                                      |                        |  |
| Disbursed                                     |  | x                      | Value of grant paid.   |
| Disbursed (EEA)                               |  | x                      | Value of grant paid (EEA).   |
| Disbursed (Norway)                            |  | x                      | Value of grant paid (Norway).  |
| EEA Distribution Key Iceland                  |  | x                      |  |
| EEA Distribution key Liechtenstein            |  | x                      |  |
| EEA Distribution key Norway                   |  | x                      |  |
| IFR approved date                             | x                                      |                        |  |
| IFR submission deadline                       | x                                      |                        |  |
| Financial report reference                    | x                                      | x                      | When used as a value (distinct count) you get the number of financial reports in your selection<br><br>Advance, Credit Note, Debit note, DPP payment, DS travel cost payment, IFR, IPO payment, payments to other organisations, reallocation. |
| Financial report type                         | x                                      |                        | Payment request for Exceptional Advance Payment, IFR#1, IFR#2 etc.   |
| Incurred                                      |  | x                      | Incurred amounts from approved IFRs.   |
| Incurred (EEA)                                |  | x                      |  |
| Incurred (Norway)                             |  | x                      |  |
| Incurred end date                             | x                                      |                        |  |
| Incurred start date                           | x                                      |                        |  |
| Incurred local currency                       |  | x                      |  |
| Incurred local currency (EEA)                 |  | x                      |  |
| Incurred local currency (Norway)              |  | x                      |  |
| Interest earned                               |  | x                      |  |
| Interest earned EEA                           |  | x                      |  |
| Interest earned Norway                        |  | x                      |  |
| Local currency                                | x                                      |                        |  |
| Organisation (non-programme related payments) | x                                      |                        |  |
| Payment date                                  | x                                      |                        | The date and time a payment was made   |
| Payment date group                            |  |                        | The year, quarter, month and day of the month a payment was made.  |

|                                  |   |   |  |
|----------------------------------|---|---|--|
| Processing status                | x |   | (BTO approved, created, paid, submitted to FMO). |
| Programme short name             | x |   |  |
| Proposed expenditures end date   | x |   |  |
| Proposed expenditures start date | x |   |  |
| Requested                        |   | x |  |
| Requested co-financing           |   | x |  |
| Requested amount (EEA)           |   | x |  |
| Requested amount (Norway)        |   | x |  |
| Submission date                  | x |   |  |

### 5.2.3. Data source: Payments and payment dates

| Field name                     | Can be used in rows / columns | Can be used as a value | Can be used as a filter | Note / example   |
|--------------------------------|-------------------------------|------------------------|-------------------------|--|
| Amounts to be approved         |                               | x                      |                         |  |
| Budget heading category        | x                             |                        | x                       | Programme Management, Outcome, Technical Assistance, etc.)             |
| Budget heading title           | x                             | x                      | x                       | <b>Budget heading Category</b>   |
|                                |                               |                        |                         | <i>Programme Management</i>  |
|                                |                               |                        |                         | <i>Outcome</i>   |
|                                |                               |                        |                         | <i>Technical Assistance</i>  |
|                                |                               |                        |                         | <b>Budget heading title</b>  |
|                                |                               |                        |                         | <i>Programme Management</i>  |
|                                |                               |                        |                         | <i>Cultural Heritage Management Enhanced</i>                           |
|                                |                               |                        |                         | <i>National Focal Point, Audit Authority etc.</i>                      |
| Country                        | x                             |                        | x                       |  |
| Disbursed                      |                               | x                      |                         | Value of grant paid per budget heading, budget title or outcome.       |
| Distribution key Iceland       |                               | x                      |                         |  |
| Distribution key Liechtenstein |                               | x                      |                         |  |
| Distribution key Norway        |                               | x                      |                         |  |
| Incurred                       |                               | x                      |                         | Incurred amounts from approved IFRs.                                   |
| Incurred description           | x                             |                        | x                       |  |
| Incurred local currency        |                               | x                      |                         |  |
| Local currency                 |                               | x                      |                         |  |
| Outcome                        | x                             |                        | x                       |  |
| Payment category               | x                             |                        | x                       | Advance, Credit Note, Debit Note, IFR, FPR.                            |
| Financial Mechanism            | X                             |                        | x                       | EEA, Norway, Co-financing  |
| Payment date                   | x                             |                        |                         | The date and time a payment was made                                   |
| Payment date group             |                               |                        |                         | The year, quarter, month and day of the month a payment was made.      |
| Payment reference              | x                             |                        |                         | Payment request for Exceptional Advance Payment, IFR#1, IFR#2 etc.     |
| Payment status                 | x                             |                        | x                       | Deleted, Stub, Created, Submitted, Approved, BTO Created, BTO Approved |

|                                |   |   |   |   |
|--------------------------------|---|---|---|---|
|                                |   |   |   | BTO Sent, BTO in Isabel, Paid                         |
| Programme area code            | x |   | x |   |
| Programme short name           | x |   | x |   |
| Priority sector code           | x |   | x |   |
| Reported incurred              |   | x |   | Incurred amounts of submitted IFRs and approved IFRs. |
| Report incurred local currency |   | x |   |   |
| Requested                      |   | x |   |   |

#### 5.2.4. Data source: Programme payments and budget headings

| Field name                       | Can be used in rows / columns | Can be used as a value | Can be used as a filter | Note  |  |
|----------------------------------|-------------------------------|------------------------|-------------------------|---|--|
| Budget heading category          | x                             |                        | x                       | Programme Management, Outcome, Technical Assistance, etc.)      |  |
| Budget heading title             | x                             |                        | x                       | <b>Budget heading Category</b><br><i>Programme Management</i>   | <b>Budget heading title</b><br><i>Programme Management</i> |
|                                  |                               |                        |                         | <i>Outcome</i>  | <i>Cultural Heritage Management Enhanced</i>               |
|                                  |                               |                        |                         | <i>Technical Assistance</i>                                     | <i>National Focal Point, Audit Authority etc.</i>          |
| Country                          | x                             |                        | x                       |   |  |
| Disbursed                        |                               | x                      |                         |   |  |
| Eligible expenditure             |                               | x                      |                         |   |  |
| Financial Mechanism              | x                             |                        | x                       | EEA, Norway, Co-financing                                       |  |
| Grant                            |                               | x                      |                         | Value of grant amount per financial mechanism.                  |  |
| Incurred                         |                               | x                      |                         | Value of incurred amount per financial mechanism.               |  |
| Incurred local currency          |                               | x                      |                         |   |  |
| Local currency                   |                               | x                      |                         |   |  |
| Outcome                          |                               | x                      |                         |   |  |
| Programme area code              | x                             |                        | x                       |   |  |
| Programme short name             | x                             |                        | x                       |   |  |
| Priority sector code             | x                             |                        | x                       |   |  |
| Reported incurred                |                               | x                      |                         | Incurred amounts of IFRs with the status approved or submitted. |  |
| Reported incurred local currency |                               | x                      |                         |   |  |
| Requested                        |                               | x                      |                         |   |  |

#### 5.2.5. Data source: Workplans

| Field name            | Can be used in rows / columns | Can be used as a value | Can be used as a filter | Note |
|-----------------------|-------------------------------|------------------------|-------------------------|------|
| Beneficiary programme | x                             |                        | x                       |      |

|                         |   |   |   |  |
|-------------------------|---|---|---|--|
| Consultants paid        |   | x |   |  |
| Consultants workplan    |   | x |   |  |
| Donor country           | x |   | x |  |
| DPP currency            | x |   | x |  |
| DPP unit cost           |   | x |   |  |
| Miscellaneous paid      |   | x |   |  |
| Miscellaneous workplan  |   | x |   |  |
| Organisation            | x |   | x |  |
| Organisation short name | x |   | x |  |
| Programme short name    | x |   | x |  |
| Salary paid             |   | x |   |  |
| Salary workplan         |   | x |   |  |
| Workplan submitted date | x |   |   |  |
| Total paid              |   | x |   |  |
| Total workplan          |   | x |   |  |
| Travel paid             |   | x |   |  |
| Travel workplan         |   | x |   |  |
| Workplan                | x |   | x |  |
| Workplan status         | x |   | x |  |
| Workplan year           | x |   | x |  |

### 5.3. Theme: Grants

#### 5.3.1. Data source: Countries

| Field name                  | Can be used in rows / columns | Can be used as a value | Can be used as a filter | Note   |
|-----------------------------|-------------------------------|------------------------|-------------------------|--|
| Country abbreviation        | x                             |                        | x                       |  |
| Country                     | x                             | x                      | x                       | When used as a value (count or distinct count) you get the number of countries in your selection |
| Country type                | x                             |                        | x                       |  |
| Disbursed                   |                               | x                      |                         |  |
| Disbursed (EEA)             |                               |                        |                         |  |
| Disbursed (Norway)          |                               |                        |                         |  |
| Financial officer           | x                             |                        | x                       |  |
| Gross Allocation (EEA)      |                               | x                      |                         |  |
| Gross Allocation (Norway)   |                               | x                      |                         |  |
| Gross Allocation            | x                             |                        |                         |  |
| Legal officer               | x                             |                        | x                       |  |
| MOU Signature Date (EEA)    | x                             |                        |                         |  |
| MOU Signature Date (Norway) |                               | x                      |                         |  |
| Net Allocation (EEA)        |                               | x                      |                         |  |
| Net Allocation (Norway)     |                               | x                      |                         |  |
| Net Allocation              |                               | x                      |                         |  |
| Results officer             | x                             |                        | x                       |  |

#### 5.3.2. Data source: Priority sectors

| Field name                          | Can be used in rows / columns | Can be used as a value | Can be used as a filter | Note  |
|-------------------------------------|-------------------------------|------------------------|-------------------------|---|
| Funding Period                      | x                             |                        | x                       |   |
| Priority sector allocation          |                               | x                      |                         |   |
| Priority sector allocation (EEA)    |                               | x                      |                         |   |
| Priority sector allocation (Norway) |                               | x                      |                         |   |
| Priority sector code                | x                             | x                      | x                       | When used as a value (count or distinct count) you get the number of priority sectors in your selection |
| Priority sector description         | x                             |                        | x                       |   |
| Priority sector name                | x                             |                        | x                       |   |

### 5.3.3. Data source: Programme areas

| Field name                             | Can be used in rows / columns | Can be used as a value | Can be used as a filter | Note   |
|--|-------------------------------|------------------------|-------------------------|--|
| Allocation (EEA) per programme area    |                               | x                      |                         |  |
| Allocation (Norway) per programme area |                               | x                      |                         |  |
| Allocation per programme area          |                               | x                      |                         |  |
| Objective                              | x                             |                        | x                       |  |
| Priority sector code                   | x                             |                        | x                       |  |
| Priority sector name                   | x                             |                        | x                       |  |
| Programme area code                    | x                             | x                      | x                       | When used as a value (count or distinct count) you get the number of programme areas in your selection |
| Programme area name                    | x                             |                        | x                       |  |
| Programme area short name              | x                             |                        | x                       |  |

### 5.3.4. Data source: Financial mechanisms

| Field name          | Can be used in rows / columns | Can be used as a value | Can be used as a filter | Note |
|---------------------|-------------------------------|------------------------|-------------------------|------|
| Financial Mechanism | x                             |                        | x                       |      |
| Funding period      | x                             |                        | x                       |      |
| Grant name          | x                             |                        | x                       |      |
| Grant short name    | x                             |                        | x                       |      |
| Gross allocation    |                               | x                      |                         |      |
| Management cost     |                               | x                      |                         |      |
| Net allocation      |                               | x                      |                         |      |

## 5.4. Theme: Programmes

### 5.4.1. Data source: Bilateral Initiatives

| Field name                                 | Can be used in rows / columns | Can be used as a value | Can be used as a filter | Note   |
|--|-------------------------------|------------------------|-------------------------|--|
| BI code                                    | x                             | x                      | x                       | When used as a value (count or distinct count) you get the number of bilateral initiatives in your selection |
| BI completion date                         | x                             |                        |                         |  |
| BI cooperation continues                   | x                             |                        |                         |  |
| BI deviation description                   | x                             |                        |                         |  |
| BI grant                                   |                               | x                      |                         |  |
| BI implementation end date                 | x                             |                        |                         |  |
| BI implementation start date               | x                             |                        |                         |  |
| BI initial description                     | x                             |                        |                         |  |
| BI name                                    | x                             |                        | x                       |  |
| BI partners                                | x                             |                        | x                       |  |
| BI results description                     | x                             |                        |                         |  |
| BI status                                  | x                             |                        | x                       |  |
| BI URL                                     | x                             |                        |                         |  |
| Call title                                 | x                             |                        | x                       |  |
| Country                                    | x                             |                        | x                       |  |
| Filter: BI deviated (Yes/No)               |                               |                        | x                       |  |
| Filter: BI level (Programme/National)      |                               |                        | x                       |  |
| Filter: BI predefined (Yes/No)             |                               |                        | x                       |  |
| Filter: BI published (Yes/No)              |                               |                        | x                       |  |
| Filter: BI terminated (Yes/No)             |                               |                        | x                       |  |
| Filter: BI type campaign (Yes/No)          |                               |                        | x                       |  |
| Filter: BI type capacity building (Yes/No) |                               |                        | x                       |  |
| Filter: BI type conference (Yes/No)        |                               |                        | x                       |  |
| Filter: BI type data collection (Yes/No)   |                               |                        | x                       |  |
| Filter: BI type internship (Yes/No)        |                               |                        | x                       |  |
| Filter: BI type matchmaking (Yes/No)       |                               |                        | x                       |  |
| Filter: BI type preparation (Yes/No)       |                               |                        | x                       |  |
| Filter: BI type study tour (Yes/No)        |                               |                        | x                       |  |
| initial submission date                    | x                             |                        |                         |  |
| Last review date                           | x                             |                        |                         |  |
| Last update date                           | x                             |                        |                         |  |
| Programme area codes                       | x                             |                        | x                       |  |
| Programme short name                       | x                             |                        | x                       |  |
| Project code (BI)                          | x                             |                        | x                       |  |
| Promoter country                           | x                             |                        | x                       |  |
| Promoter organisation                      | x                             |                        | x                       |  |
| Promoter organisation e-mail               |                               | x                      |                         |  |
| Russian invasion (yes/no)                  |                               | x                      |                         |  |

|                                |  |   |  |  |
|--------------------------------|--|---|--|--|
| Russian invasion amount        |  | x |  |  |
| Russian invasion beneficiaries |  | x |  |  |

### 5.4.2. Data source: Calls

| Field name  | Can be used in rows / columns | Can be used as a value | Can be used as a filter | Note   |
|---|-------------------------------|------------------------|-------------------------|--|
| Applications approved for funding                               |                               | x                      |                         |  |
| Applications approved for funding with a DPP                    |                               | x                      |                         |  |
| Applications approved for funding with a DPP from Iceland       |                               | x                      |                         |  |
| Applications approved for funding with a DPP from Liechtenstein |                               | x                      |                         |  |
| Applications approved for funding with a DPP from Norway        |                               | x                      |                         |  |
| Applications received in calls                                  |                               | x                      |                         |  |
| Applications received with a donor project partner              |                               | x                      |                         |  |
| Applications rejected for non-compliance with criteria          |                               | x                      |                         |  |
| Applications on the reserve list                                |                               | x                      |                         |  |
| Bilateral call level (Country/Programme)                        | x                             |                        | x                       |  |
| Call amount   |                               | x                      |                         |  |
| Call created date   | x                             |                        |                         |  |
| Call number   | x                             |                        | x                       |  |
| Call publication date   | x                             |                        |                         |  |
| Call status   | x                             |                        | x                       |  |
| Call submission deadline  | x                             |                        |                         |  |
| Call title  | x                             | x                      | x                       | When used as a value (count or distinct count) you get the number of calls in your selection |
| Call type   | x                             |                        | x                       |  |
| Call URL  | x                             |                        |                         |  |
| Country   | x                             |                        | x                       |  |
| Decision date   | x                             |                        |                         |  |
| Filter: Bilateral call (Yes/No)                                 |                               |                        | x                       |  |
| Filter: Call published on eeagrants.org (Yes/No)                |                               |                        | x                       |  |
| Filter: Relunched call (Yes/No)                                 |                               |                        | x                       |  |
| Filter: Rolling call (Yes/No)                                   |                               |                        | x                       |  |
| Financial Mechanism   | x                             |                        | x                       |  |
| Grant applied for in calls                                      |                               | x                      |                         |  |
| Grant awarded in calls  |                               | x                      |                         |  |
| Initial submission date   | x                             |                        |                         |  |
| Call last updated date  | x                             |                        |                         |  |
| Projects contracted   |                               | x                      |                         |  |
| Projects contracted from the reserve list                       |                               | x                      |                         |  |
| Programme short name  | x                             |                        | x                       |  |
| Related outcome(s)  | x                             |                        | x                       |  |

### 5.4.3. Data source: Programmes

| Field name                                     | Can be used in rows / columns | Can be used as a value | Can be used as a filter | Note   |
|--|-------------------------------|------------------------|-------------------------|--|
| Bilateral status                               | x                             |                        | x                       |  |
| Communication officer                          | x                             |                        | x                       |  |
| Country  | x                             |                        | x                       |  |
| Disbursed                                      |                               | x                      |                         |  |
| Disbursed (EEA)                                |                               | x                      |                         |  |
| Disbursed (Norway)                             |                               | x                      |                         |  |
| Donor Programme Partner (DPP)                  | x                             |                        | x                       |  |
| Eligibility start date                         | x                             |                        | x                       |  |
| Eligibility end date                           | x                             |                        | x                       |  |
| Eligible expenditure                           |                               | x                      |                         |  |
| Filter: BF programme (Yes/No)                  |                               |                        | x                       |  |
| Filter: Directly contracted programme (Yes/No) |                               |                        | x                       |  |
| Filter: Signed programmes (Yes/No)             |                               |                        | x                       |  |
| Filter: TA programme (Yes/No)                  |                               |                        | x                       |  |
| Finance officer                                | x                             |                        | x                       |  |
| Fund operator (FO)                             | x                             |                        | x                       |  |
| Grant (EEA)                                    |                               | x                      |                         |  |
| Grant (Norway)                                 |                               | x                      |                         |  |
| Grant  |                               | x                      |                         |  |
| Grant rate                                     | x                             | x                      | x                       |  |
| Host programme area                            | x                             |                        | x                       |  |
| Incurred                                       |                               | x                      |                         |  |
| Incurred (EEA)                                 |                               | x                      |                         |  |
| Incurred (Norway)                              |                               | x                      |                         |  |
| International Programme Organisation (IPO)     | x                             |                        | x                       |  |
| Legal officer                                  |                               |                        |                         |  |
| National Focal Point (NFP)                     | x                             |                        | x                       |  |
| Operational issues status                      | x                             |                        | x                       |  |
| Programme Agreement signature date             | x                             |                        | x                       |  |
| Programme areas                                | x                             | x                      | x                       | When used as a value (count or distinct count) you get the number of programme areas in your selection |
| Programme co-financing                         |                               | x                      |                         |  |
| Programme manager                              | x                             |                        | x                       |  |
| Programme name                                 | x                             |                        | x                       |  |
| Programme operator                             | x                             |                        | x                       |  |
| Programme short name                           | x                             | x                      | x                       | When used as a value (count or distinct count) you get the number of programmes in your selection      |
| Programme status                               | x                             |                        | x                       |  |

|                                 |   |   |   |  |
|---------------------------------|---|---|---|--|
| Programme summary               | x |   | x |  |
| Progress index                  |   | x |   |  |
| Requested amount                |   | x |   |  |
| Requested amount (co-financing) |   | x |   |  |
| Requested amount (EEA)          |   | x |   |  |
| Requested amount (Norway)       |   | x |   |  |
| Results and evaluation officer  | x |   | x |  |

#### 5.4.4. Data source: Project target groups

| Field name                     | Can be used in rows / columns | Can be used as a value | Can be used as a filter | Note |
|--------------------------------|-------------------------------|------------------------|-------------------------|------|
| Country                        | x                             |                        | x                       |      |
| Programme short name           | x                             |                        | x                       |      |
| Project code                   | x                             |                        | x                       |      |
| Target group (end beneficiary) | x                             |                        | x                       |      |
| Target group (intermediary)    | x                             |                        | x                       |      |

#### 5.4.5. Data source: Projects

| Field name  | Can be used in rows / columns | Can be used as a value | Can be used as a filter | Note |
|---|-------------------------------|------------------------|-------------------------|------|
| ACF capacity building amount                      |                               | x                      |                         |      |
| Call  | x                             |                        | x                       |      |
| Country   | x                             |                        | x                       |      |
| Eligibility end date group                        |                               | x                      |                         |      |
| Estimated CO2 emissions reduction/year contracted |                               | x                      |                         |      |
| Filter: Best practice project (Yes/No)            |                               |                        | x                       |      |
| Filter: DPP project (Yes/No)                      |                               |                        | x                       |      |
| Filter: Project marked for review (Yes/No)        |                               |                        | x                       |      |
| Filter: Predefined project (Yes/No)               |                               |                        | x                       |      |
| Filter: Project published (Yes/No)                |                               |                        | x                       |      |
| Filter: Project reviewed (Yes/No)                 |                               |                        | x                       |      |
| Filter: Cooperation will continue (Yes/No)        |                               |                        | x                       |      |
| Financial Mechanism                               | x                             |                        | x                       |      |
| Implementation modality                           | x                             |                        | x                       |      |
| Initial project description                       |                               | x                      |                         |      |
| Internal comments                                 |                               | x                      |                         |      |
| Last review date                                  |                               | x                      |                         |      |
| Last review date group                            |                               | x                      |                         |      |
| Local currency                                    |                               | x                      |                         |      |
| Policy marker filter: Antidiscrimination          |                               |                        | x                       |      |

|   |   |   |   |   |
|---|---|---|---|---|
| Policy marker filter: Gender equality   |   |   | x |   |
| Policy marker filter: Roma              |   |   | x |   |
| Policy marker filter: Transparency      |   |   | x |   |
| Policy marker filter: Vulnerable Groups |   |   | x |   |
| Priority sector codes                   | x |   | x |   |
| Programme area codes                    | x |   | x |   |
| Programme short name                    | x |   | x |   |
| Project bilateral description           | x |   |   |   |
| Project code                            | x | x | x | When used as a value (count or distinct count) you get the number of projects in your selection |
| Project contract status                 | x |   | x |   |
| Project education type                  | x |   | x |   |
| Project eligibility end date            | x |   | x |   |
| Project eligible expenditure            |   | x |   |   |
| Project grant rate                      | x | x | x |   |
| Project grant                           |   | x |   |   |
| Project grant incurred in the IFRs      |   | x |   |   |
| Project initial description             | x |   |   |   |
| Location                                | x |   | x |   |
| Location NUTS 0                         | x |   | x |   |
| Location NUTS 1                         | x |   | x |   |
| Location NUTS 2                         | x |   | x |   |
| Location NUTS 3                         | x |   | x |   |
| Project name                            | x |   | x |   |
| Project activities completed date       | x |   | x |   |
| Project outcome(s)                      | x |   | x |   |
| Project outcome(s) number               |   |   |   |   |
| Project promoter e-mail                 |   |   |   |   |
| Project results description             | x |   |   |   |
| Project sector                          | x |   | x |   |
| Project sector detailed                 | x |   | x |   |
| Project signature sate                  | x |   |   |   |
| Research discipline                     | x |   | x |   |
| Research type                           | x |   | x |   |
| Russian invasion (yes/no)               |   | x |   |   |
| Russian invasion amount                 |   | x |   |   |
| Russian invasion beneficiaries          |   | x |   |   |
| Status                                  | x |   | x |   |
| Tags                                    |   | x |   |   |
| URL                                     | x |   |   |   |

### 5.4.6. Data source: Risk Assessment

| Field name                       | Can be used in rows / columns | Can be used as a value | Can be used as a filter | Note   |
|----------------------------------|-------------------------------|------------------------|-------------------------|--|
| Completion date                  | x                             |                        | x                       |  |
| Country                          | x                             |                        | x                       |  |
| Filter: Risk applicable (Yes/No) |                               |                        | x                       |  |
| Programme short name             | x                             |                        | x                       |  |
| Actual response to risk          | x                             |                        |                         |  |
| Type of risk assessment          | x                             |                        |                         |  |
| Risk consequence                 |                               | x                      |                         |  |
| Risk description                 | x                             | x                      |                         | When used as a value (count or distinct count) you get the number of risks in your selection |
| Planned future response to risk  | x                             |                        |                         |  |
| Risk likelihood                  |                               | x                      |                         |  |
| Planned response to risk         | x                             |                        |                         |  |
| Risk related to                  | x                             |                        | x                       |  |
| Risk report                      | x                             |                        |                         |  |
| Risk response type               | x                             |                        | x                       |  |
| Risk score                       |                               | x                      |                         |  |
| Type of risk                     | x                             |                        | x                       |  |
| Year of risk report              | x                             |                        | x                       |  |

## 5.5. Theme: Results

### 5.5.1. Data source: Achievement progress

| Field name                        | Can be used in rows / columns | Can be used as a value | Can be used as a filter | Note   |
|-----------------------------------|-------------------------------|------------------------|-------------------------|--|
| Achievement                       |                               | x                      |                         | Numerical field  |
| Achievement (text)                | x                             |                        |                         | Includes also any text inserted in the field   |
| Achievement denominator           |                               | x                      |                         | These can be used together through a calculated field                                    |
| Achievement numerator             |                               |                        |                         |  |
| Achievement source                |                               |                        |                         |  |
| Achievement year                  | x                             |                        | x                       |  |
| Baseline                          |                               | x                      |                         | Numerical field  |
| Baseline (text)                   | x                             |                        |                         | Includes also any text inserted in the field   |
| Core/common indicator name        | x                             |                        | x                       |  |
| Country                           | x                             |                        | x                       |  |
| Filter: Common indicator (Yes/No) |                               |                        | x                       |  |
| Filter: Core indicator (Yes/No)   |                               |                        | x                       |  |
| Indicator                         | x                             | x                      | x                       | When used as a value (distinct count) you get the number of indicators in your selection |
| Outcome                           | x                             |                        | x                       |  |
| Output                            | x                             |                        | x                       |  |
| Programme area code               | x                             |                        | x                       |  |
| Programme area name               | x                             |                        | x                       |  |
| Programme short name              | x                             |                        | x                       |  |
| Target                            |                               | x                      |                         |  |
| Target (text)                     | x                             |                        |                         |  |
| Unit of measurement               | x                             |                        | x                       |  |

## 5.5.2. Data source: Results framework

| Field name                        | Can be used in rows / columns | Can be used as a value | Can be used as a filter | Note  |
|-----------------------------------|-------------------------------|------------------------|-------------------------|---|
| Achievement                       |                               | x                      |                         | Numerical field   |
| Achievement (text)                | x                             |                        |                         | Includes also any text inserted in the field  |
| Achievement denominator           |                               | x                      |                         | These can be used together through a calculated field   |
| Achievement numerator             |                               |                        |                         |   |
| Baseline                          |                               | x                      |                         | Numerical field   |
| Baseline (text)                   | x                             |                        |                         | Includes also any text inserted in the field  |
| Core/common indicator name        | x                             |                        | x                       |   |
| Country                           | x                             |                        | x                       |   |
| Filter: Common indicator (Yes/No) |                               |                        | x                       |   |
| Filter: Core indicator (Yes/No)   |                               |                        | x                       |   |
| Funding period                    | x                             |                        | x                       |   |
| Indicator                         | x                             | x                      | x                       | When used as a value (count or distinct count) you get the number of indicators in your selection |
| Outcome                           | x                             |                        | x                       |   |
| Output                            | x                             |                        | x                       |   |
| Programme area code               | x                             |                        | x                       |   |
| Programme area name               | x                             |                        | x                       |   |
| Programme short name              | x                             |                        | x                       |   |
| Target                            |                               | x                      |                         | Numerical field   |
| Target (text)                     | x                             |                        |                         | Includes also any text inserted in the field  |
| Unit of measurement               | x                             |                        | x                       |   |

### 5.5.3. Data source: Results per disaggregation

| Field name                             | Can be used in rows / columns | Can be used as a value | Can be used as a filter | Note  |
|--|-------------------------------|------------------------|-------------------------|---|
| Achievement                            |                               | x                      |                         |   |
| Achievement (text)                     | x                             |                        | x                       |   |
| Achievement denominator                |                               | x                      |                         | These can be used together through a calculated field   |
| Achievement numerator                  |                               |                        |                         |   |
| Core/common indicator name             | x                             |                        | x                       |   |
| Country                                |                               | x                      |                         |   |
| Disaggregation category                | x                             |                        | x                       |   |
| Disaggregation type (gender, age, ...) | x                             |                        | x                       | When used as a value (distinct count) you get the number of indicator disaggregations in your selection |
| Indicator                              | x                             |                        | x                       | When used as a value (distinct count) you get the number of indicators in your selection                |
| Filter: Common indicator (Yes/No)      |                               |                        | x                       |   |
| Filter: Core indicator (Yes/No)        |                               |                        | x                       |   |
| Outcome                                | x                             |                        | x                       |   |
| Output                                 | x                             |                        | x                       |   |
| Programme area code                    | x                             |                        | x                       |   |
| Programme area name                    | x                             |                        | x                       |   |
| Programme short name                   | x                             |                        | x                       |   |