

# GrACE User Manual for IPOs

Version 1.0, January 2023

## Table of Contents

|      |  |   |
|------|--|---|
| 1.   | Introduction .....                               | 3 |
| 2.   | Annual Progress Report and Financial Report..... | 3 |
| 2.1. | Completing Annual Progress Report on GrACE.....  | 4 |
| 2.2. | Submitting Financial Report and APR .....        | 8 |

## 1. Introduction

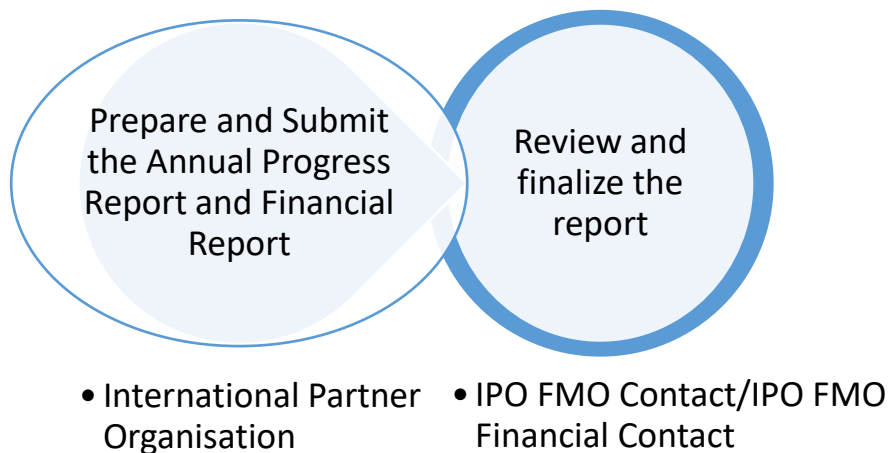
GrACE is short for Grants Administration and Collaboration Environment. The system is used for the management of the EEA and Norwegian Financial Mechanisms 2014-2021 and is intended to be accessed by Donor and Beneficiary State entities and the Financial Mechanism Office (FMO). GrACE is accessed through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

The purpose of this user manual is to give International Partner Organisations (IPOs) a detailed overview of how to submit the Annual Progress Report and Financial Report in GrACE.

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 periodically check for updated versions.

## 2. Annual Progress Report and Financial Report

This chapter describes the layout of the Annual Progress Reports, along with the Financial Report, and how it should be completed by IPOs.



The APR and Financial Report shall be submitted once a year:

- 31<sup>st</sup> of March– the Annual Progress Report is started automatically by GrACE on the 15<sup>th</sup> of January each year to be submitted by the International Partner Organisations by the 31<sup>st</sup> of March according to the cooperation agreements. The Financial Report is submitted at the same time (31<sup>st</sup> of March).

The IPO contact is assigned the task in GrACE. The name of the report is automatically set to <IPO name> Annual Progress Report - <year>. The IPO FMO Contact or the IPO FMO Financial Contact then review the report.

Annual Progress Reports (APRs) provide structured information and narrative assessment regarding the activities undertaken in the past year, including any highlights and lessons learned. Annual expenditures are also expected to be accounted for. FMO has access to APRs for all IPOs and IPOs have access to the APRs on their own page.

Available in the report are:

- the lists of programmes and projects as of date when the report is created
- any changes done in GrACE which are reflected in the APR until it's "approved".

## 2.1. Completing Annual Progress Report on GrACE

After receiving an automatic notification by GrACE on 15th<sup>st</sup> of January, the first step is to submit the **Annual Progress Report (APR)** along with the **Financial Report** to be reviewed by FMO.

The task for uploading both documents is available under the **My tasks** section, located on the top left side of your GrACE Dashboard. If there are multiple users in your organisation, the task will go to the contact person set as primary for the IPO organisation role in GrACE.

Click on the name of the task to open it. Always access the task by clicking on the task name and not on the document name.

|                          | Task name ▼                        | Context ▼  | Planned end date ▼ | Document ▼   |
|--------------------------|------------------------------------|--|--------------------|--|
| <input type="checkbox"/> | Fill in IPO Annual Progress Report | Organisation for Economic Co-operation and Development (OECD FR) |                    | Organisation for Economic Co-operation and Development Annual Progress Report - 2022 |

The task can be seen by other team members/users from the same organisation. It can be acquired from these users under **My team(s) tasks** in the Dashboard, by clicking the checkbox in front of the task (1) and then **Take over** (2).

|                                     | Task name ▼                        | Context ▼  | Planned end date ▼ | Document ▼   | Role/Group ▼                                      |
|-------------------------------------|------------------------------------|--|--------------------|--|---|
| <input checked="" type="checkbox"/> | Fill in IPO Annual Progress Report | Organisation for Economic Co-operation and Development (OECD FR) |                    | Organisation for Economic Co-operation and Development Annual Progress Report - 2022 | International Partner Organisation (Organisation) |

Before submitting the APR, you are required to fill out the various sections of the APR template. The sections are located under the **Structured data** tab (1). Click “edit” in the left-hand corner to begin (2).

The screenshot shows a task interface for 'Fill in IPO Annual Progress Report'. The 'Structured Data' tab is selected and marked with a red circle '1'. A red arrow points to the 'Edit' button in the bottom right corner, which is also circled with a red circle '2'. The interface includes sections for 'Workflow', 'Main document', 'Secondary documents', 'Other documents', 'Upload documents', and 'Actions'.

Please note that the four sections of the APR template – General overview (A), Progress report per programme (B), Progress report per project (C) and Additional comments (D) – must be filled out individually. Therefore, the steps listed above need to be repeated for each section, albeit with slight modifications that will be explained below:

The screenshot shows the document interface for 'Organisation for Economic Co-operation and Development Annual Progress Report - 2022'. The 'Structured Data' tab is highlighted with a red circle 'A'. Red circles 'B', 'C', and 'D' are placed over the 'Progress report per programme', 'Progress report per project', and 'Additional comments' tabs respectively. The 'General overview' tab is also visible.

For **(A)**, a box will appear where you can write the highlights during the reporting year (3) and the total cost of the programme (4). The total cost should be the same as the total reported in the Financial Report. Click on **Save** (5) to save the information and upload it into the template.

Document: Organisation for Economic Co-operation and Development Annual Progress Report - 2022

Preview | **Structured Data**

General overview | Progress report per programme | Progress report per project | Additional comments

General overview

Summary of highlights during the reporting period **3**

Required for submission. Words 0, characters 0.

\* Total cost **4**

€ 100,000

Cancel | **Save** **5**

For **(B)**, click on tab Progress report per programme under **Structured data** (1) and then edit on the right-hand corner to insert the necessary information (2).

Document: Organisation for Economic Co-operation and Development Annual Progress Report - 2022

Preview | **Structured Data**

General overview | **Progress report per programme** **1** | Progress report per project | Additional comments

GR-GOODGOVERNANCE - Good Governance, Accountable Institutions, Transparency, Greece **2** | **Edit**

Expand all / Collapse all

After you click edit, the name of each programme the IPO oversees will appear on the top left-hand corner (3). Fill out the categories corresponding with main results achieved, main outputs achieved and relationship assessments (4). Repeat for all programmes listed. Once all the required information is filled out, click **Save** (5).

The screenshot shows a form titled "PL-LOCALDEV - Local Development. Poland" with a red circle '3' next to the title. The form contains three main sections, each with a red circle '4' next to its title:

- Main results achieved**: "Assessment of the programme's progress in the reporting period and whether it is on track". It includes a text input field and a "Required for submission." label.
- Main outputs achieved**: "Main outputs to the programme preparation & development phase" and "Main outputs to the programme implementation phase". Each has a text input field and a "Required for submission." label.
- Relationships assessment**: "An assessment of the relationship between the Programme Operator, the DPP(s) and the IPO". It includes a text input field and a "Required for submission." label.

At the bottom right, there are "Cancel" and "Save" buttons, with a red circle '5' next to the "Save" button.

By clicking "edit" in the upper right-hand corner, the same process is repeated for:

(C) Progress report per project, and

The screenshot shows a document titled "Organisation for Economic Co-operation and Development Annual Progress Report - 2022". The "Structured Data" tab is active, showing a "Progress report per project" section with a red circle '1' next to the tab label. The section contains two entries:

- CZ-GOVERNANCE**: A grey bar with a red circle '2' next to the label and a red circle '3' next to the bar. Below it is a text input field and a "Required for submission." label.
- LV-HOMEAFFAIRS**: A grey bar with a red circle '2' next to the label and a red circle '3' next to the bar. Below it is a text input field and a "Required for submission." label.

At the bottom right, there are "Cancel" and "Save" buttons, with a red circle '4' next to the "Save" button.

(D) Additional comments. This section is for reporting on activities and progress additional projects that the IPO is involved in but not as a formal project partner. Use the same headings as for programmes when inputting info per project Moreover, you can report on other activities, such as cooperation on events, communications etc. Remember to always click **Save** to not lose any information (3).

Document: Organisation for Economic Co-operation and Development Annual Progress Report - 2022

Preview Structured Data

General overview Progress report per programme Progress report per project **Additional comments** 1

Additional comments

2

Words 0, characters 0.

Cancel Save 3

## 2.2 Submitting Financial Report and APR

Once the structured data templates are filled out, return to the upper left-hand corner of the tasks to submit the Financial Report. Tick the box next to \*Financial Report and then the green cloud icon next to **Upload documents** (1). There is no structured data for the report on GrACE so it's necessary to manually upload it.

Main document

Organisation for Economic Co-operation and Development Annual ... 15.01.2023

Secondary documents  
None

Other documents   
None

Upload documents 1

\*Financial Report

Actions

Select

Write your comments here...

Submit

Upload the Financial Report from your computer or drag and drop it (2). The report should be certified and signed/stamped and include the breakdown of budget/cost categories. PDF versions are preferred.

Task: Fill in IPO Annual Progress Report In progress

Details Comments (0)

Upload documents: \*Financial Report

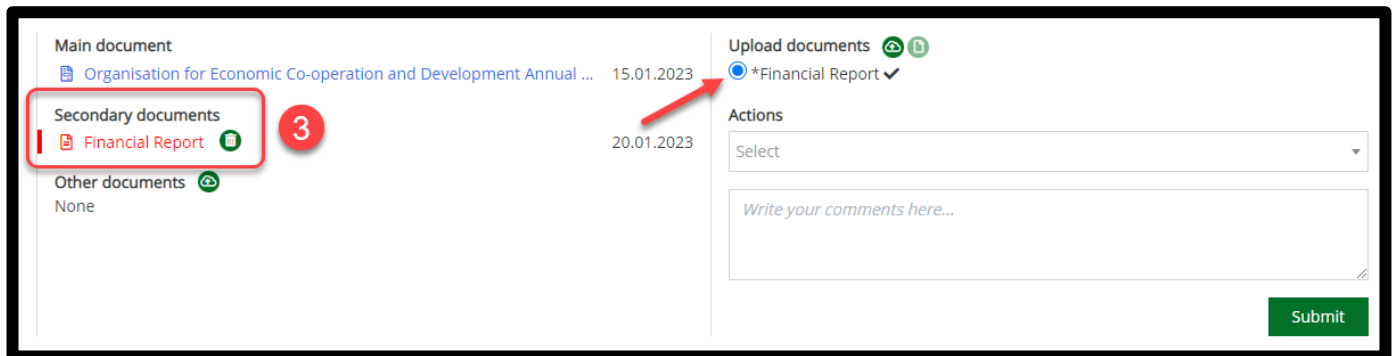
2 Upload one file

Or drag and drop a file here

Cancel



Once the file has been successfully uploaded, it will appear under **Secondary documents** as “Financial Report” (3) and a black checkmark will be placed next to \*Financial Report. It is possible to replace the report by clicking on the green bin icon and then repeating steps 1-2.



On the upper right-hand corner, select “Submit to FMO” under **Actions** (4) and then **Submit** (5). The APR and Financial Report are then submitted simultaneously.

