

Manage contacts in GrACE

GrACE User manual for external users

Version 2.0, July 2020

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1. Introduction

GrACE is short for Grants Administration and Collaboration Environment. The system is used for the management of the EEA and Norwegian Financial Mechanisms 2014-2021 and is intended to be used by Donor and Beneficiary State entities and the Financial Mechanism Office (FMO).

This manual serves as a guidance for users on how to manage the contacts in GrACE. More specifically, how to request new user accounts for persons within their organisation, how to deactivate contacts which do not work in their organisation anymore, where to find the contacts from their organisation which have a GrACE account.

Should you experience any technical problems while using the system, please contact us at grace-support@efta.int.

2. Managing contacts in GrACE

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



- Create contacts for your organisation in GrACE
- Request user accounts for these contacts
- Edit the existing contacts in your organisation in GrACE
- Deactivate users from your organisation in GrACE



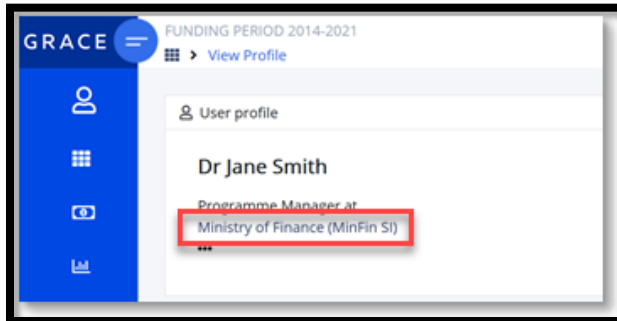
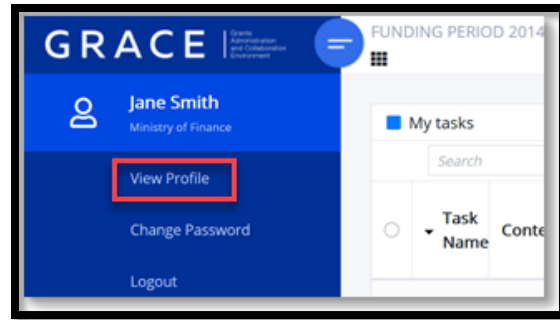
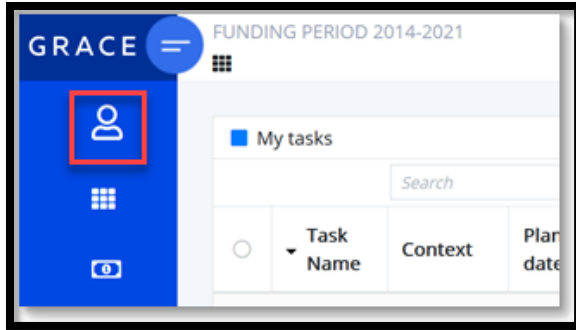
- Create/edit/deactivate users for other organisations (besides yours) ⇒ Contact GrACE support if these are needed
- Change organisation details (name, location etc)

3. Creating new contacts

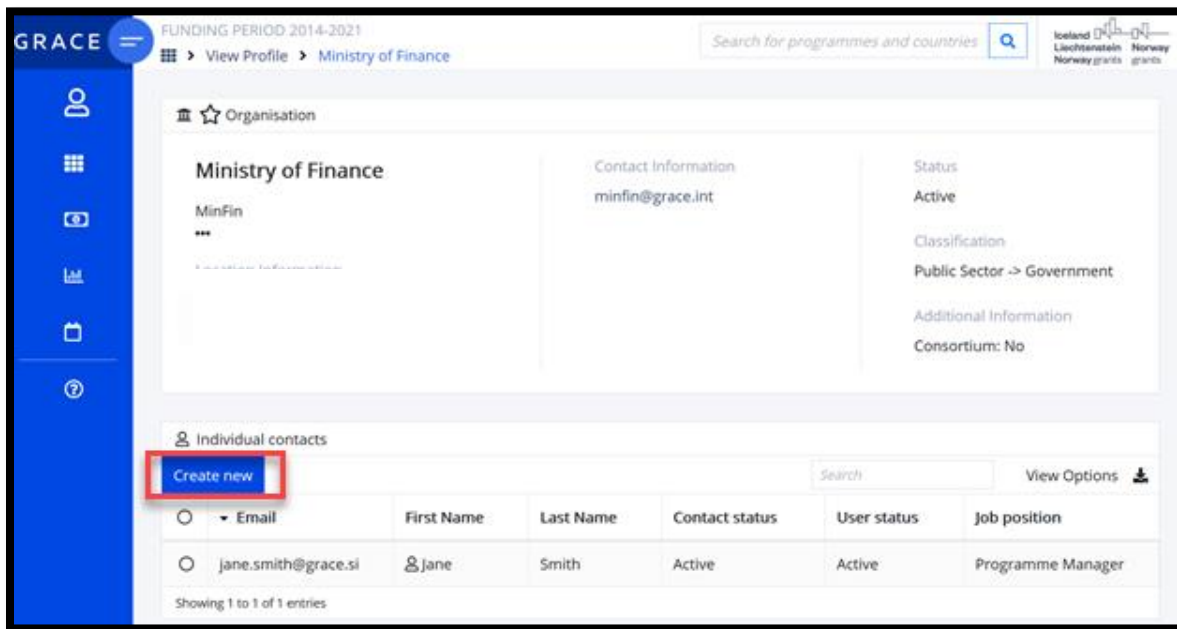
In GrACE, there are 2 types of accounts possible.

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

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



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



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

Create individual

* Title: Select

* First name: [text input]

* Last name: [text input]

* Email: [text input]

* Organisation: Ministry of Finance (MinFin SI)

Job position: [text input]

Phone number: [text input]

Mobile number: [text input]

Buttons: Cancel, Save, Save+new

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

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

4. Requesting user activation

Following the creation of contacts, a user activation request must be sent to the FMO, before the contact will be able to login as a GrACE user.

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

Individual

Prof John Smith

Ministry of Finance (MinFin SI)

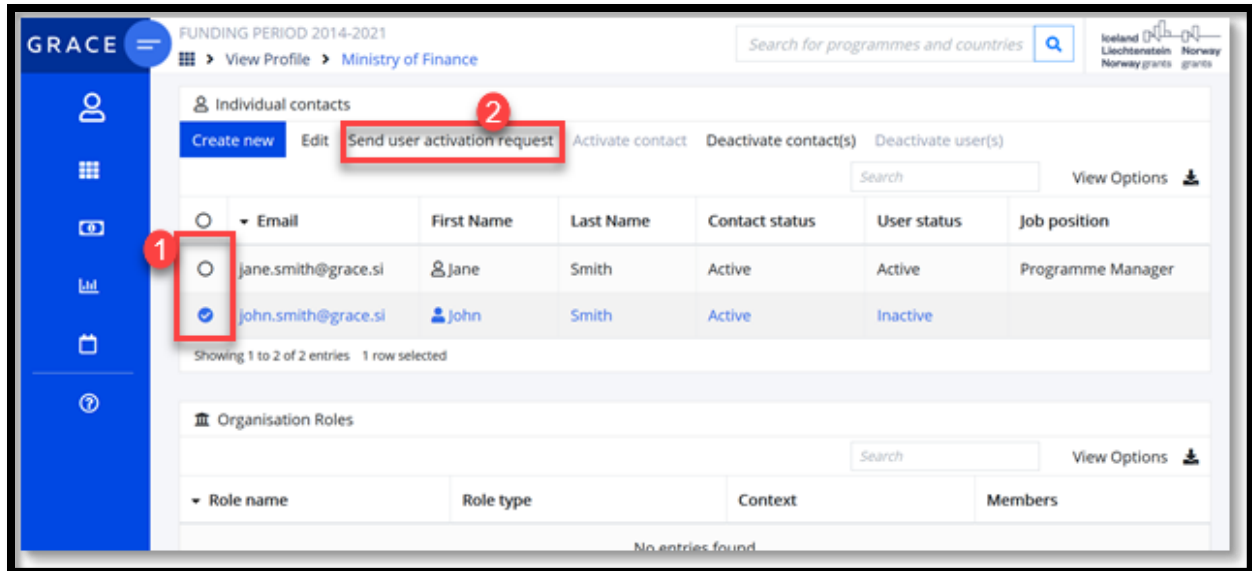
Contacts: john.smith@grace.si

Contact status: Active

User status: Inactive

Buttons: Send user activation request, Deactivate contact

You can also send for multiple contacts at once:



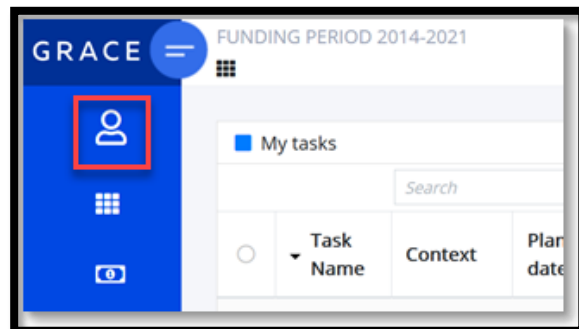
Once users are approved by the FMO, they will receive an automatic email from GrACE with instructions on how to create a personal password. After that the users can start enjoying GrACE!

5. Edit existing contacts from your organisation

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

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

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



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

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

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

Edit individual

* Title: Dr

* First name: test

* Last name: test

* Email: test@yourorganisation.com

Secondary email:

* Organisation: Your organisation

Job position:

Phone number:

Mobile number:

Buttons: Cancel, Save, Save+continue

After editing the contact details, you can click on:

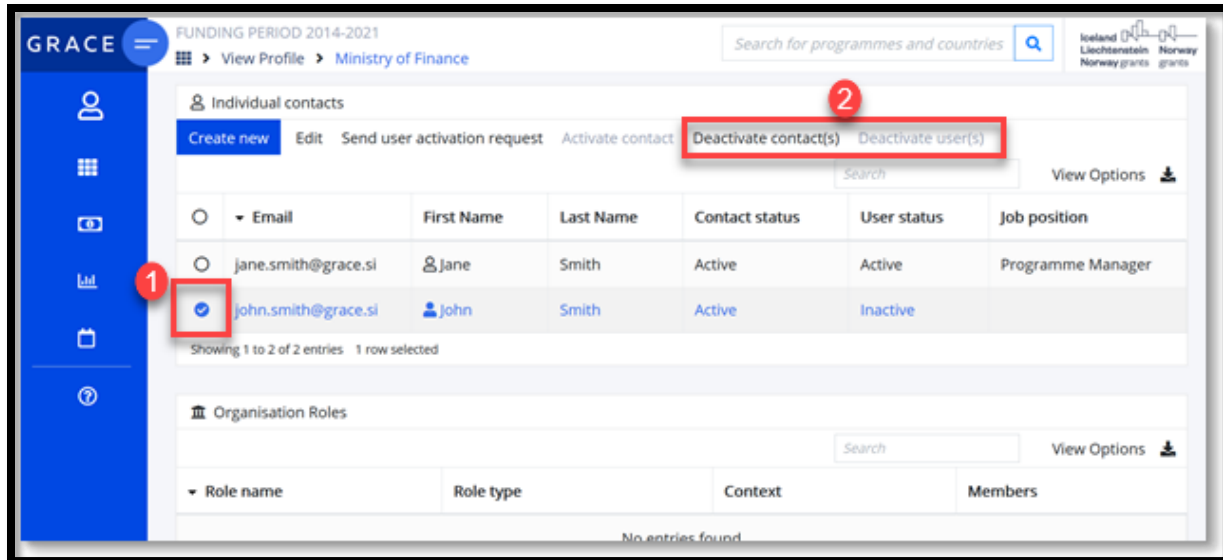
- **Save:** this will save the information and go out from Edit mode
- **Save+continue:** this will save the information and allow you to continue editing the information for the contact

6. Deactivate contacts

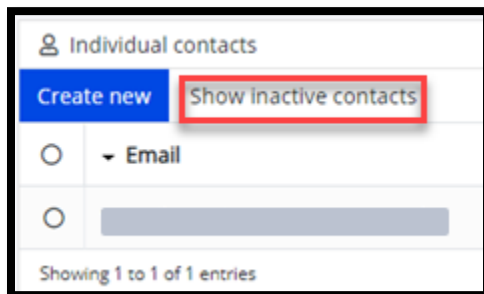
If someone no longer should have access to your organisation, you can deactivate this person. In chapter 3 we explained the two types of accounts available in GrACE, namely “contact” and “user”. Please refer to that chapter for further explanations of the two.

To deactivate, there are two options:

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



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



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

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

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

As a National Focal Point user, you can edit the Joint Committee for Bilateral Funds (JCBF) from your country page. Open the Contacts tab, and you will see JCBF presented. Here, you can add users from your own organisation and FMO. You can also change the chairperson and remove members. Please note, you cannot see details for or add members from Donor organisations as this is maintained by the FMO.

Click on "Manage members", then search for the existing GrACE contact you would like to add and select the person from the list. (If the contact does not show up, s/he might not be an existing

contact in GrACE. Please create the contact first by following the steps explained earlier in this user manual.) Then, set the correct chairperson and the others as members. Save when finished.

The image consists of three screenshots from the GrACE system, illustrating the steps to manage members for the Joint Committee for Bilateral Funds (JCBF).

- Top Screenshot:** Shows the 'Manage members' page for the JCBF. A red circle '1' highlights the 'Manage members' button. The table below it is empty, displaying 'No entries found'.
- Middle Screenshot:** Shows the search process. A red circle '3' highlights the search input field containing 'gra'. A red circle '2' highlights the 'Find user' button. The search results table lists:

Name	Organisation	Parent
Grace Admin	Financial Mechanism Office (FMO BE)	
GrACE Supplier	Financial Mechanism Office (FMO BE)	
- Bottom Screenshot:** Shows the 'Members' page. A red circle '4' highlights the role dropdown menu for 'Grace Admin', which is set to 'Chairperson'. The 'GrACE Supplier' role is set to 'Member'. A red circle '5' highlights the 'Save' button at the bottom right.

8. Manage Cooperation Committee member for a programme (by PO/FO)

If the programme has a Donor Programme Partner or an International Partner Organisation, there will be a Cooperation committee option from the Programme site. Here, the Programme Operator or Fund Operator can add and amend the roles of the committee members. Note: PO/FO will not be able to add contacts from the Donor organisations, this can be done by the FMO.

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

Cooperation committee

Manage members **1**

Search View Options

Name	Organisation name	Role
No entries found		

Showing 0 to 0 of 0 entries

Search: grac **3**

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

Find user **2**

Cancel Save

Cooperation committee

Members

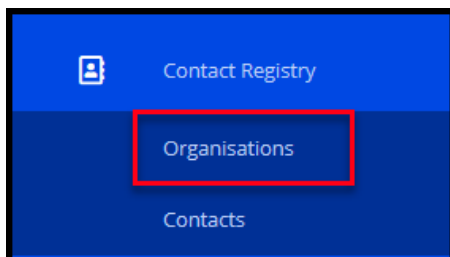
Grace Admin (Financial Mechanism Office (FMO BE))	Select role	Chairperson	🗑️
GrACE Supplier (Financial Mechanism Office (FMO BE))	Select role	Member 4	🗑️

Add user

Find user

Cancel Save **5**

9. View Contacts registry – Organisation



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

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

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

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

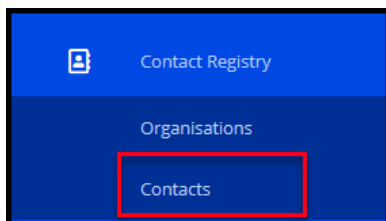
By clicking on View Options, you can add/remove further fields to this list (4). By clicking on the download symbol (5), you can export this list to Excel.

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

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

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

10. View Contacts registry – Contacts



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

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

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

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

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

<i>Search individuals</i> 1								Search 2	Search Options 3
<input type="radio"/>	Email	First Name	Last Name	Contact status	User status	Job position	Organisation 4	Individual role(s) 5	
<input type="radio"/>	Contact 1			Active	Active		Financial Mechanism Office (FMO BE)		
<input type="radio"/>	Contact 2			Active	Active		Financial Mechanism Office (FMO BE)		
<input type="radio"/>	Contact 3			Active	Active		Financial Mechanism Office (FMO BE)		