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GRACE Grants Administration and Collaboration Environment

# Self-service data analysis

**GrACE User manual**

Version 1.0, July 2020

EEA Grants / Norway Grants
Financial Mechanism Office
Grants Management Systems Unit
Boulevard du Régent 47-48
1000 Brussels, Belgium

www.eeagrants.org
www.norwaygrants.org

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# 1. Introduction

The purpose of this document is to instruct GrACE users on how to use Self-service data analysis (GrACE functionality made available in April 2020).

# 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. More accurately, the users will experience a maximum lag of 15 min between when information is registered or modified on other GrACE sections, and when they should see it reflected in SSDA. 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.

The amount of information a user can analyse using the tool 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 Civil Society programmes).
- Programme Partners have access to all countries and programmes where they act as a partner.

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 | Donors/DPPs |
| 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) | All users |
| Grants | Priority sectors | Priority sectors 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 |
| 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 is able to:

- Create a new analysis using the provided data sources
  - One analysis can contain several visualisations (graphs or tables)
- View up-to-date results of data analysis reports
- Add a title and notes explaining the purpose of the analysis
- Save, export and share a data analysis with other users[1]
- Make their own "clone" of a data analysis shared with them by someone else[2]
- Modify their data analyses (ie. those created or cloned by themselves)

## TIP FOR EXCEL USERS

The GrACE Self-service data analysis functionality follows to a large extent a similar logic as Excel pivot tables.

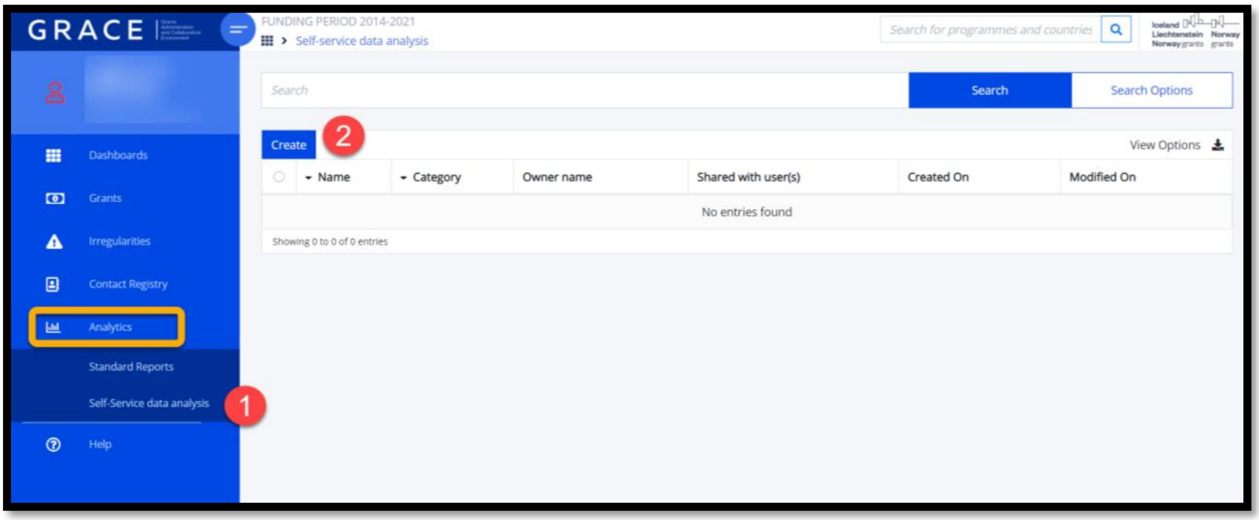
## REPORTING SUPPORT

If you have any questions or you wish to make sure your analysis is correct, please contact **GrACE support** (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.



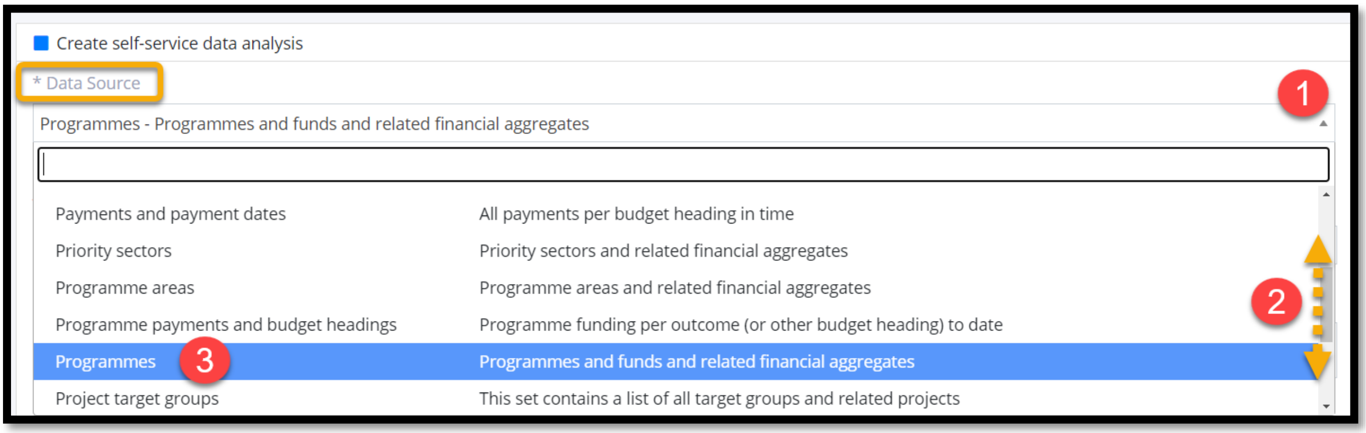

The user can choose to add several visualisations in the same analysis. The following sections instruct you on how to build your analysis, for example:

- 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.

[1] 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.
[2] Similar to "save as" in MS Office tools

## 3.2. Choose a data source

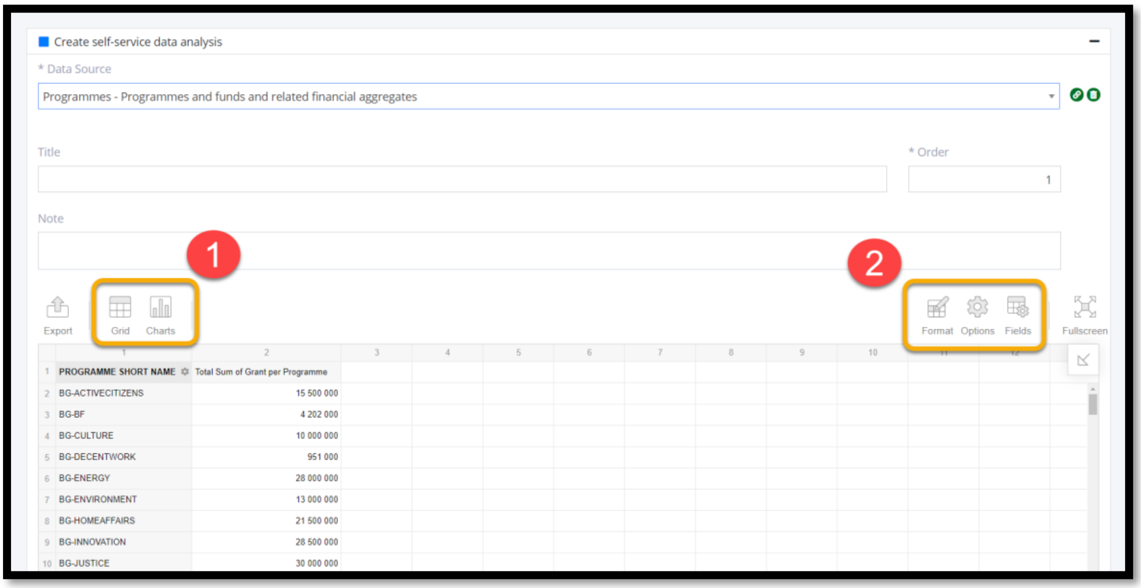
The user is asked to select a data source from a collection of tables **(1-2-3).** On the left you see the name of a data source (here: *Programmes*) and on the right its description (here: *Programmes and funds and related financial aggregates*).




## 3.3. Set up your visualisation

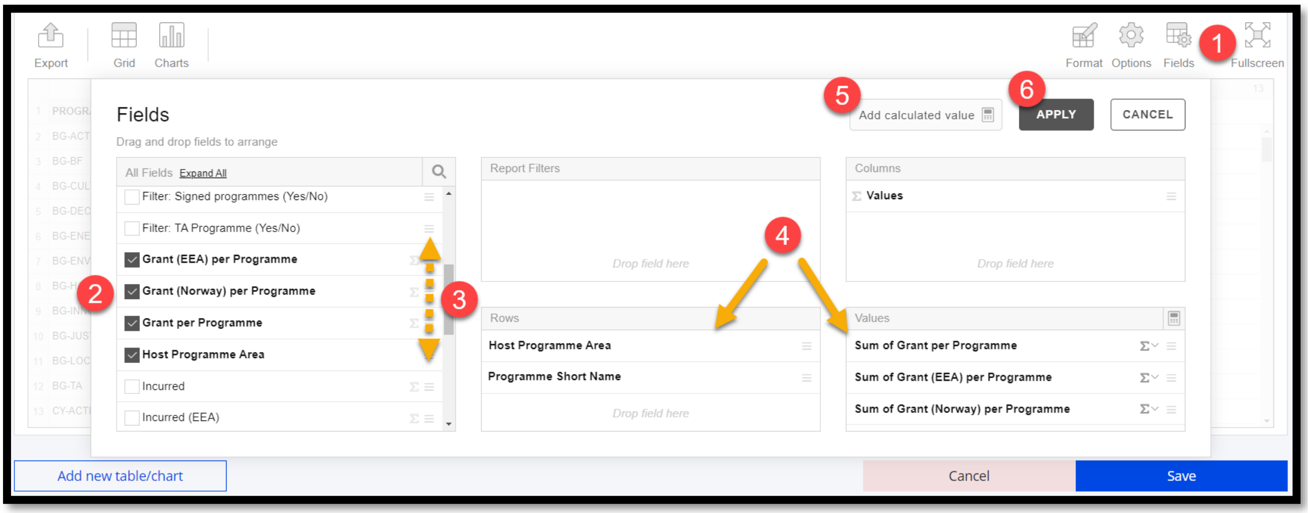
Once a data source is selected, the tool will present a default table setup for that specific source. The user will then make the desired changes by for example

**(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. the values presented (Format)
   ii. the layout of a grid (Options)
   iii. choosing different fields and how to use them (Fields)



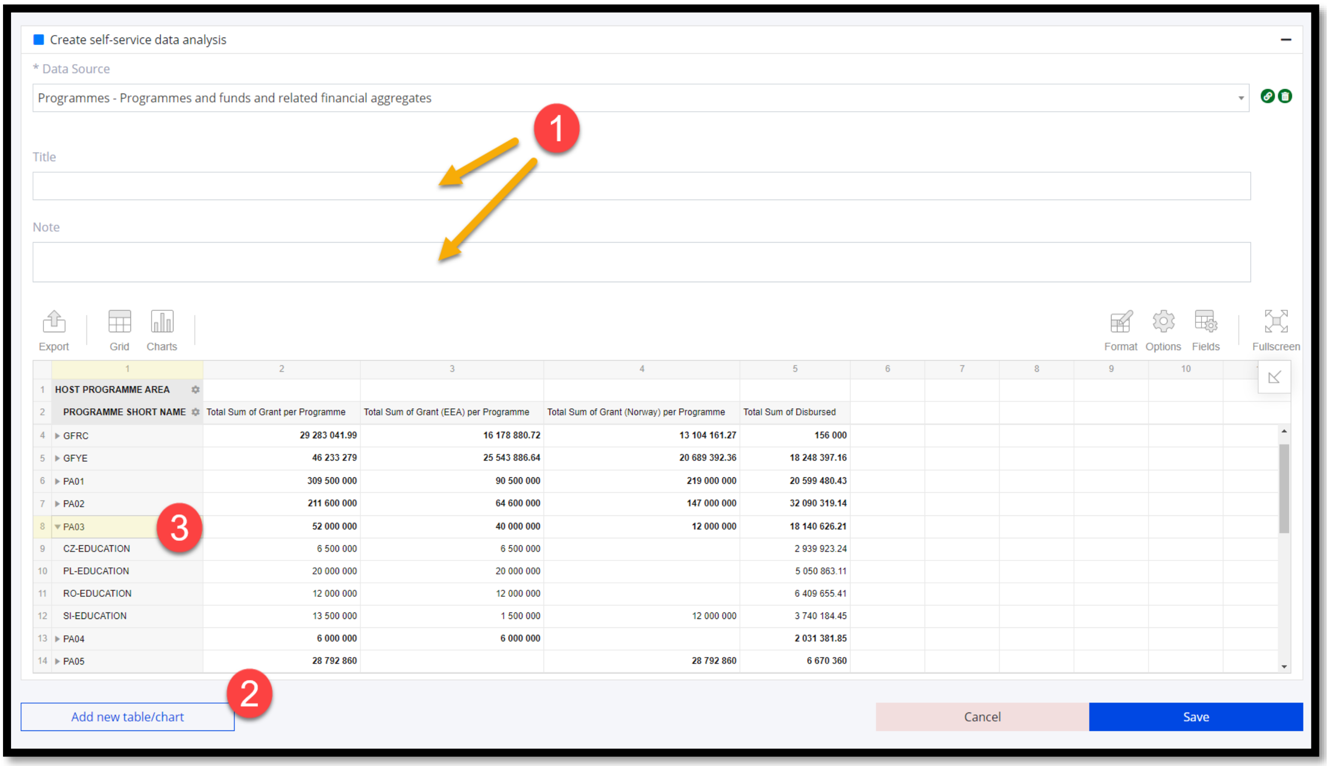
By opening the “Fields” menu **(1)**, the user can

- 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.



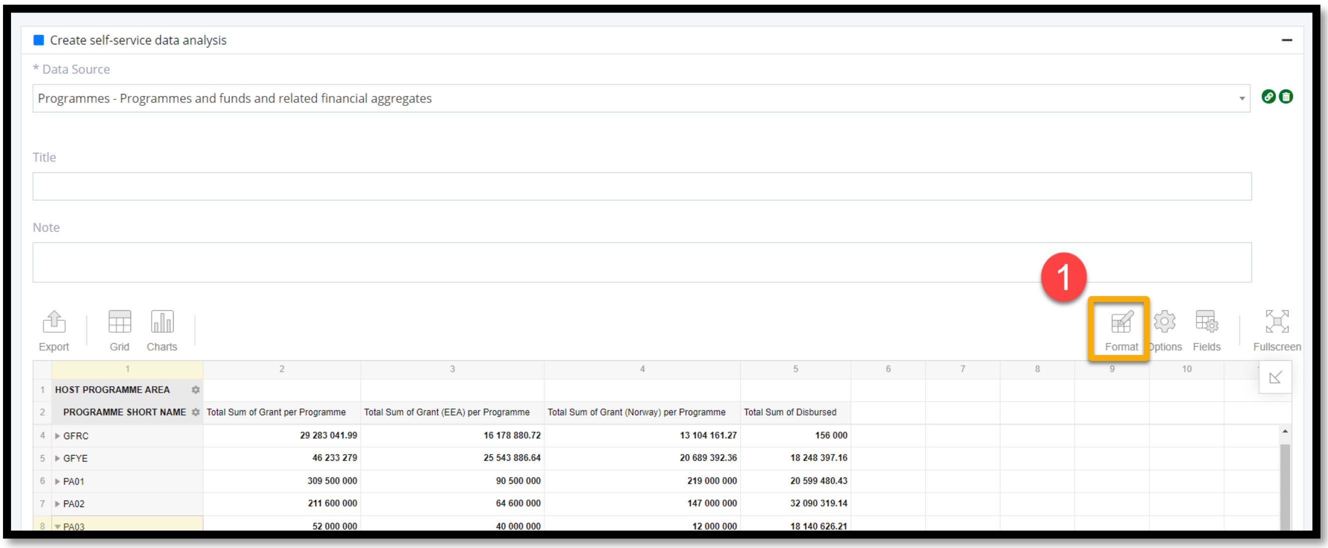

Once the analysis is done, give it a title and description to clarify what the analysis shows **(1)**. You can also continue to add a new table/chart by clicking the button at the bottom **(2).**

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 3.5. for instructions on how to change the layout.



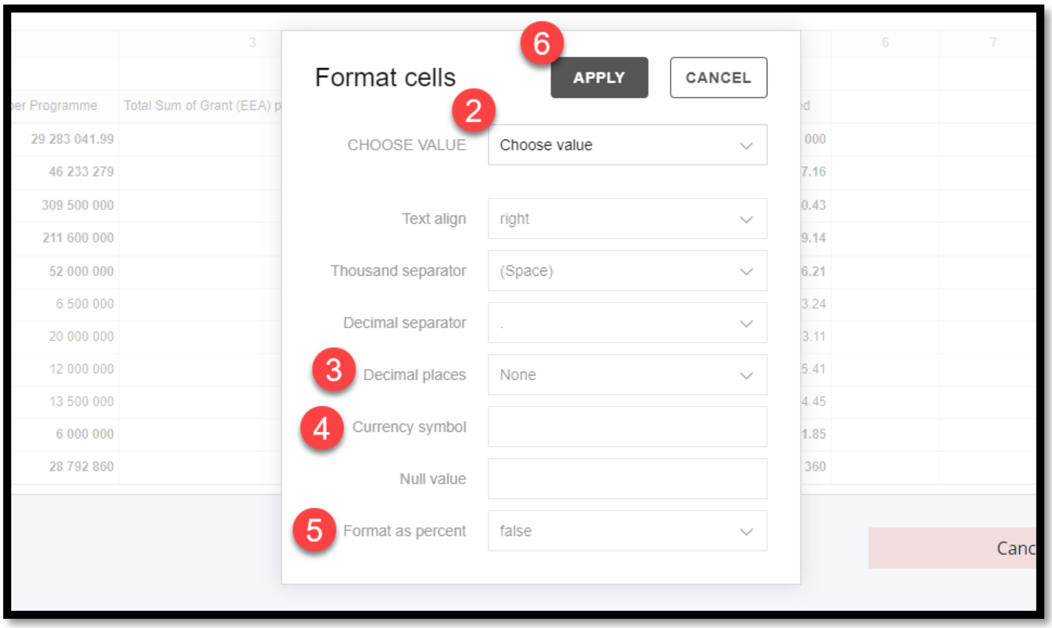
## 3.4. Formatting numerical values

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**




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

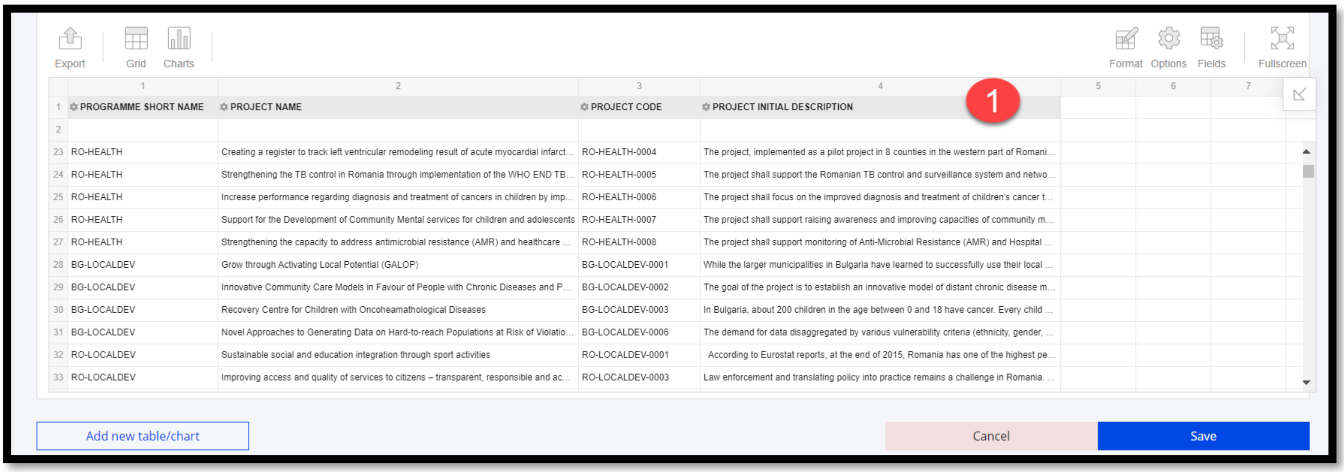



If you want, you can change your visualisation to a graph and keep the formatting.

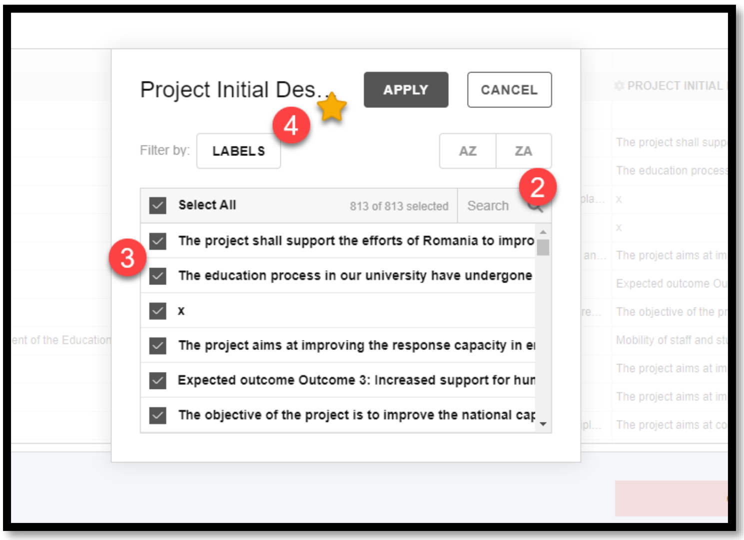
## 3.5. Filtering and grid layout options

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”

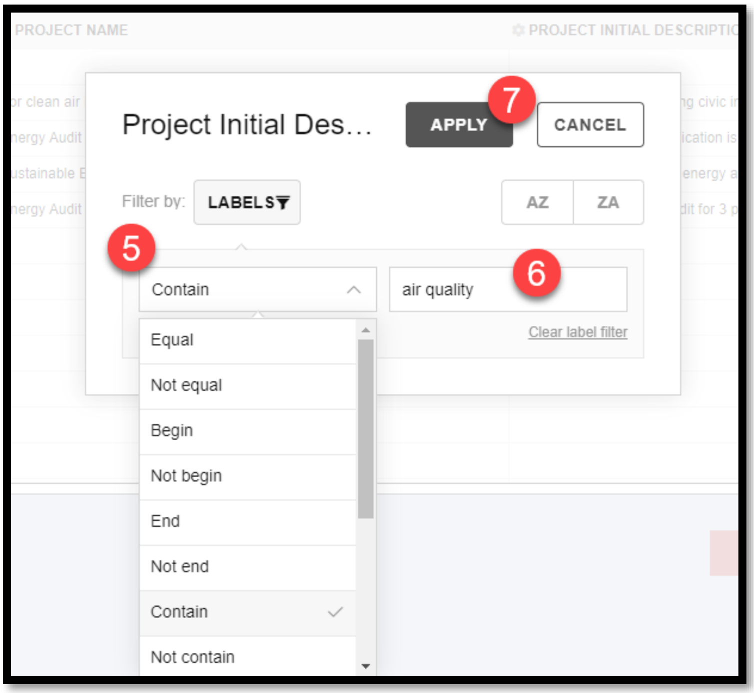
- In the flat grid (selecting fields is described in section 3.3.), click on the title **(1)**

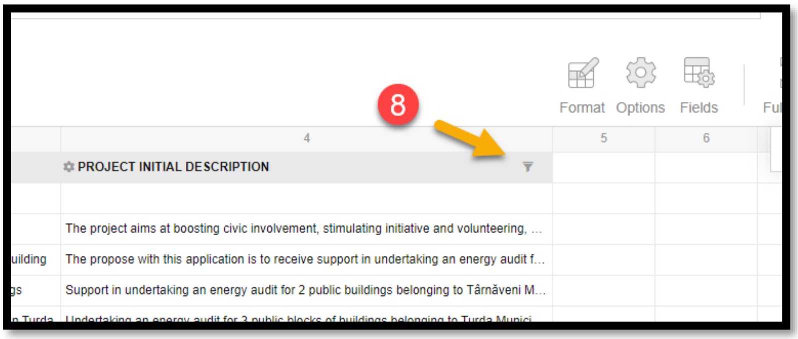



- A pop-up window appears, where you can either
    - search for specific words **(2),**
    - manually select the descriptions you want to include **(3),**
    - or click on the button *Labels* **(4)** to create a rule for filtering project descriptions
        - this will automatically include any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



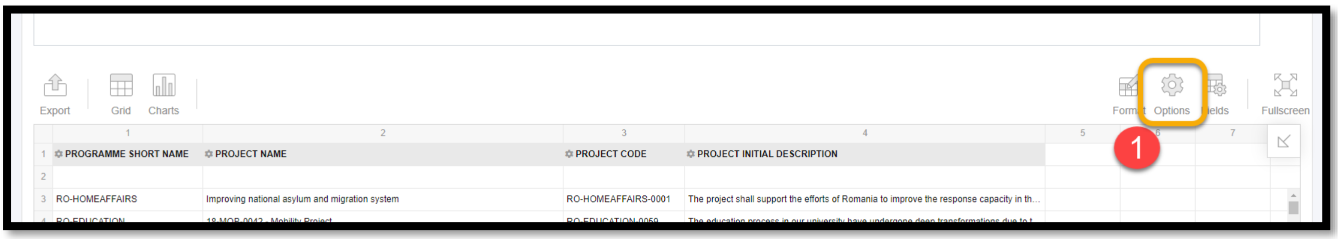

- If you click on *Labels*, a new pop-up will open where you can determine your filtering condition. In this example we want to show only those projects, where the description mentions (contains) the keyword “air quality”.
    - Select a suitable filtering operator **(5)**
    - Define the keyword **(6)**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

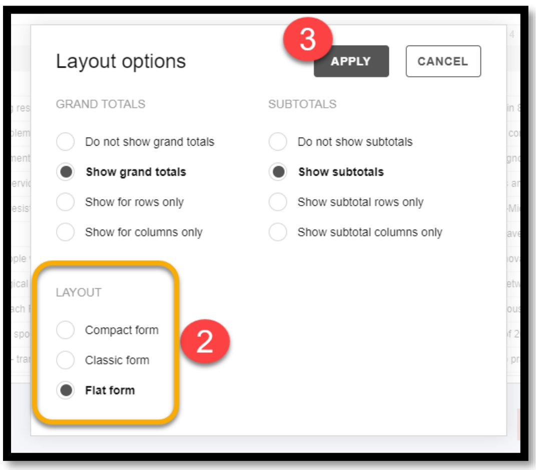



You can also change the layout of your grid. Here are the steps for changing the grid layout from flat to compact or classic:

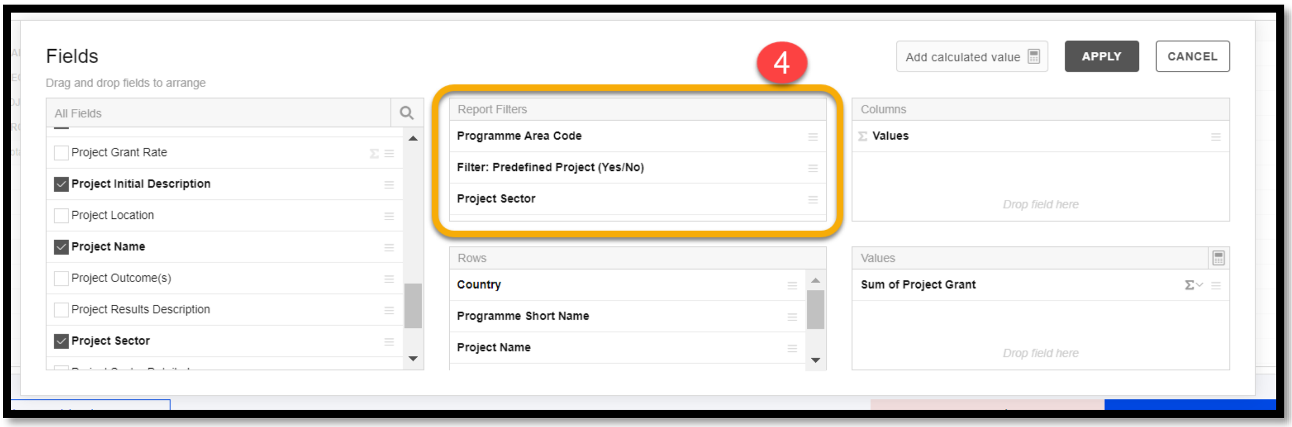
- Click “Options” **(1)**
- in the popup window choose either compact or classic layout **(2)** and hit “Apply” **(3)**



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 hit “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.




## 3.6. 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:

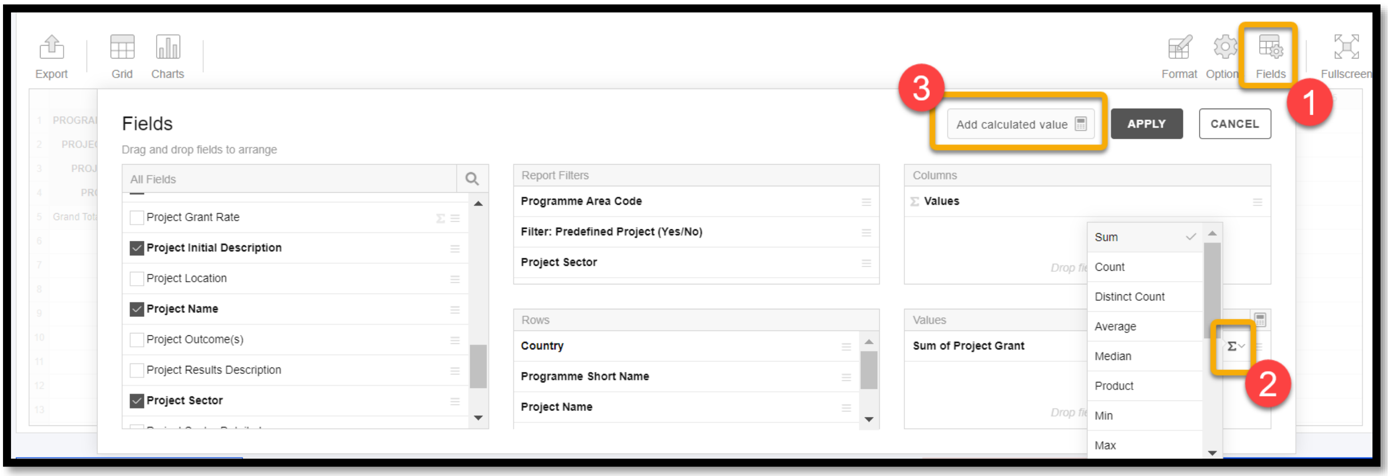
- Count (calculates the number of values e.g. number of countries)
- Distinct Count (calculates the number of individual values)

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

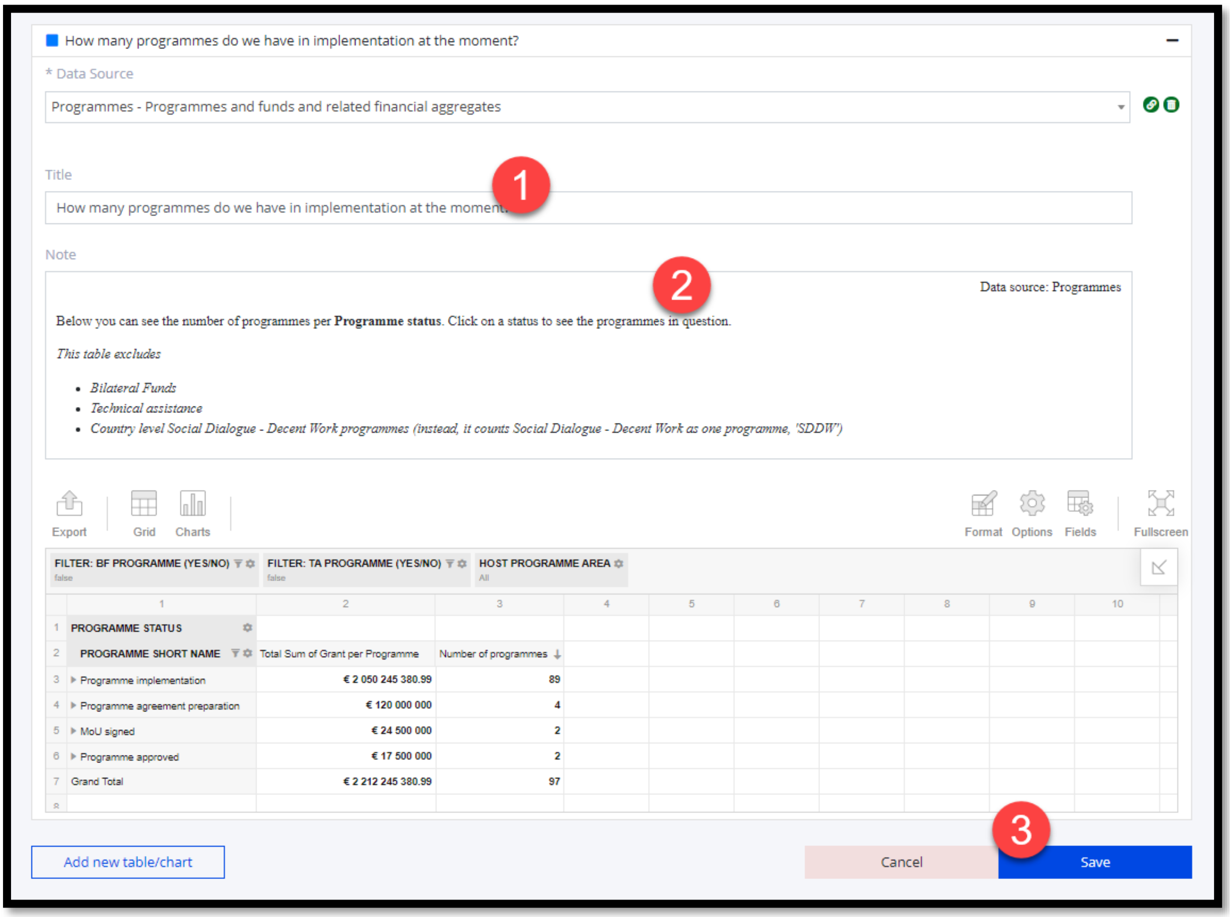
a. Fields **(1)** and then click on the sum symbol ∑ next to your value field **(2)**
b. Add a calculated value, where you can configure your own custom calculation **(3)**
   a. for example: (disbursed amount / programme grant) = disbursed rate %



# 3.7. Save, share & export

## 3.7.1 Save

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





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

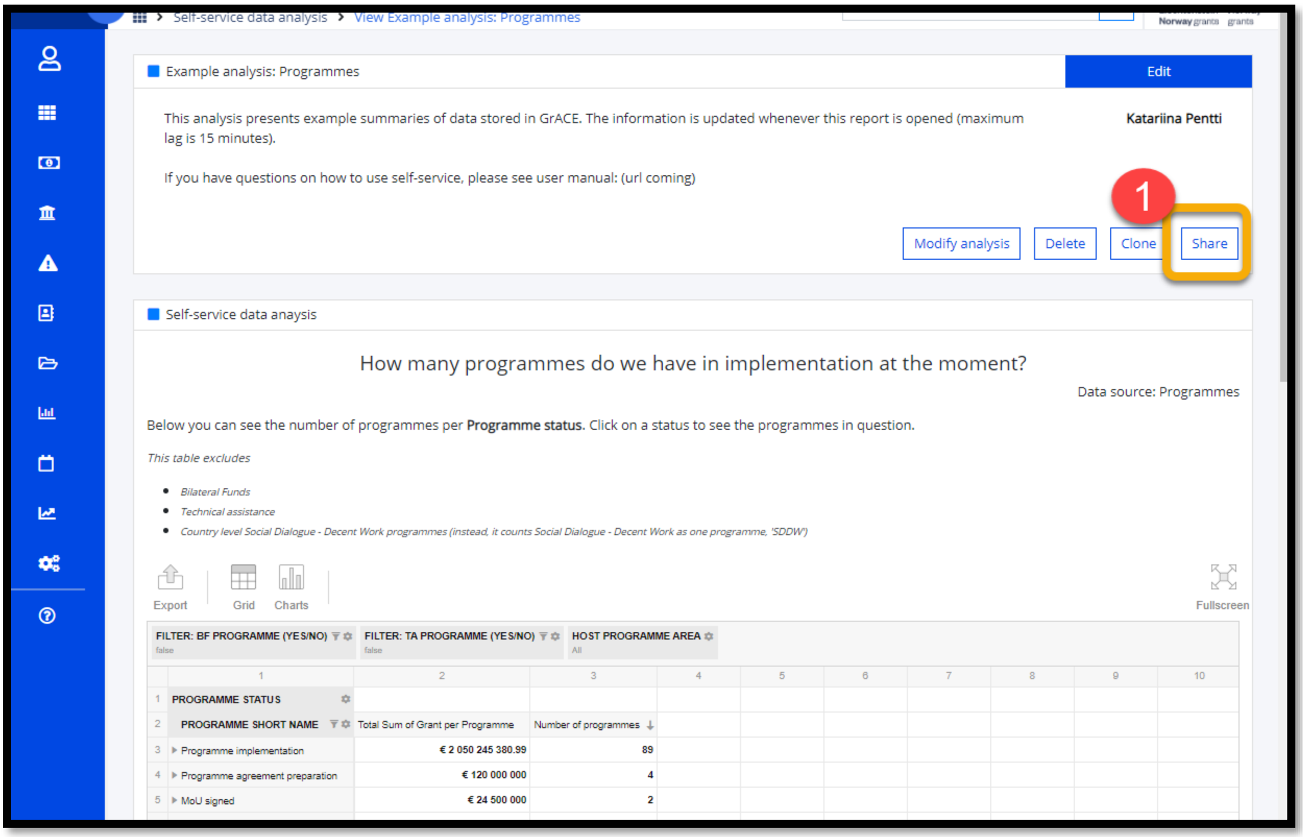
- Name – Here you give a name for the whole analysis (this is common for all the tables and graphs you added in the analysis)
- Category – optional, to help keep your analyses organised
- Description of the analysis - Here you give a description for the whole analysis (this is common for all the tables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

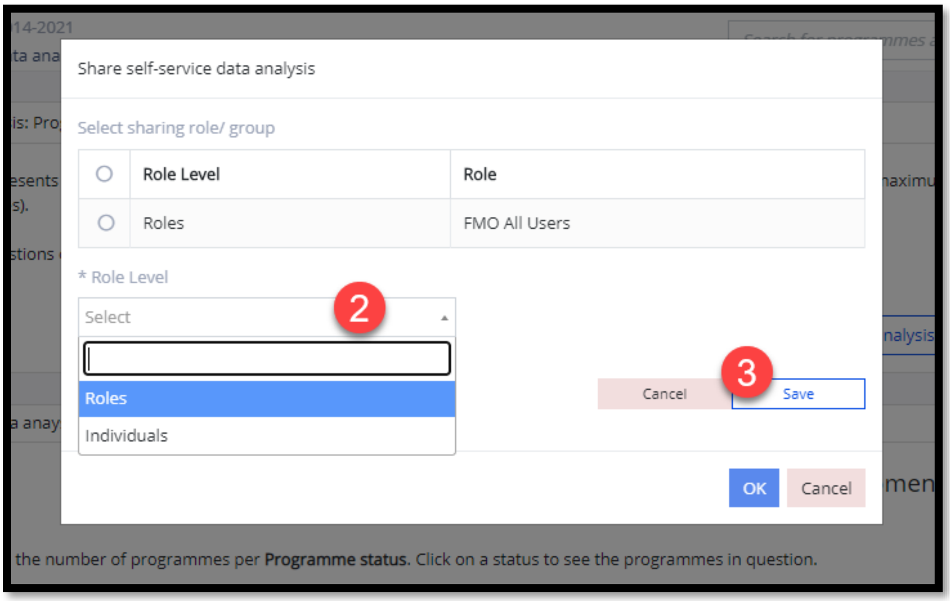
Then press OK to finish saving.

## 3.7.2 Share

Once you have shared 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.



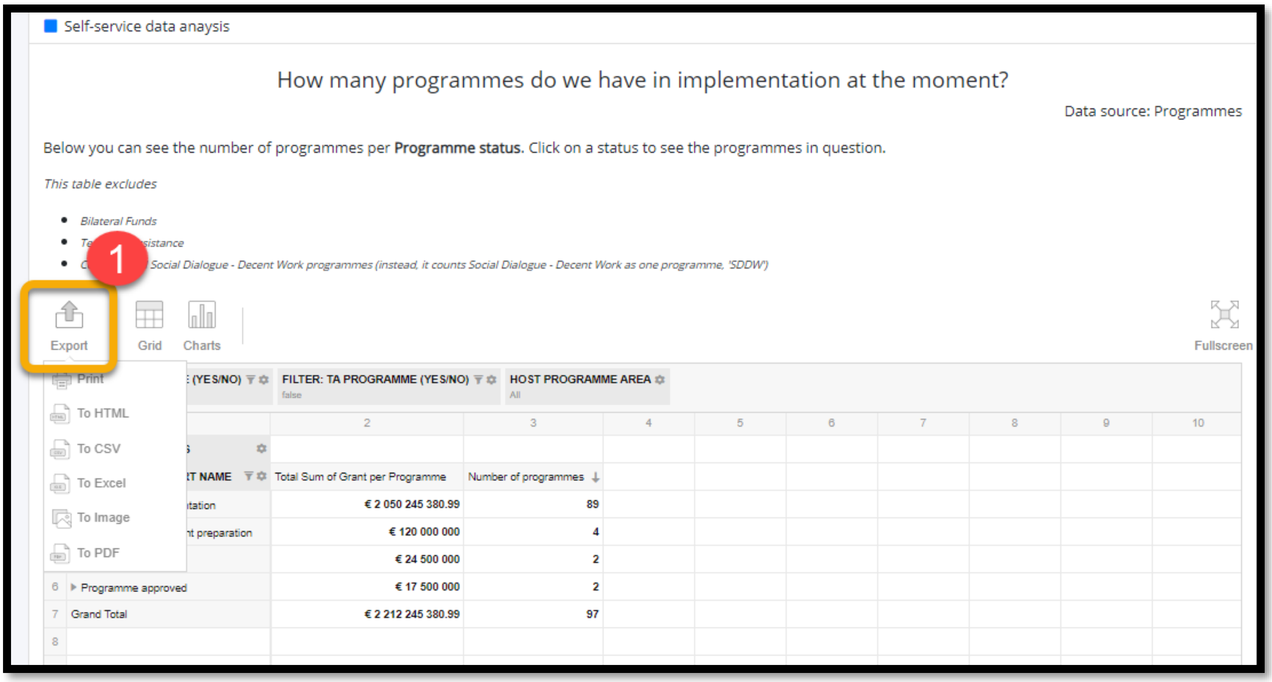




The other users will only see what is visible to them according to their user access, for example a Programme Operator will only see information related to their own programme.

### 3.7.3 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.

## 3.8. Advanced: join data sources

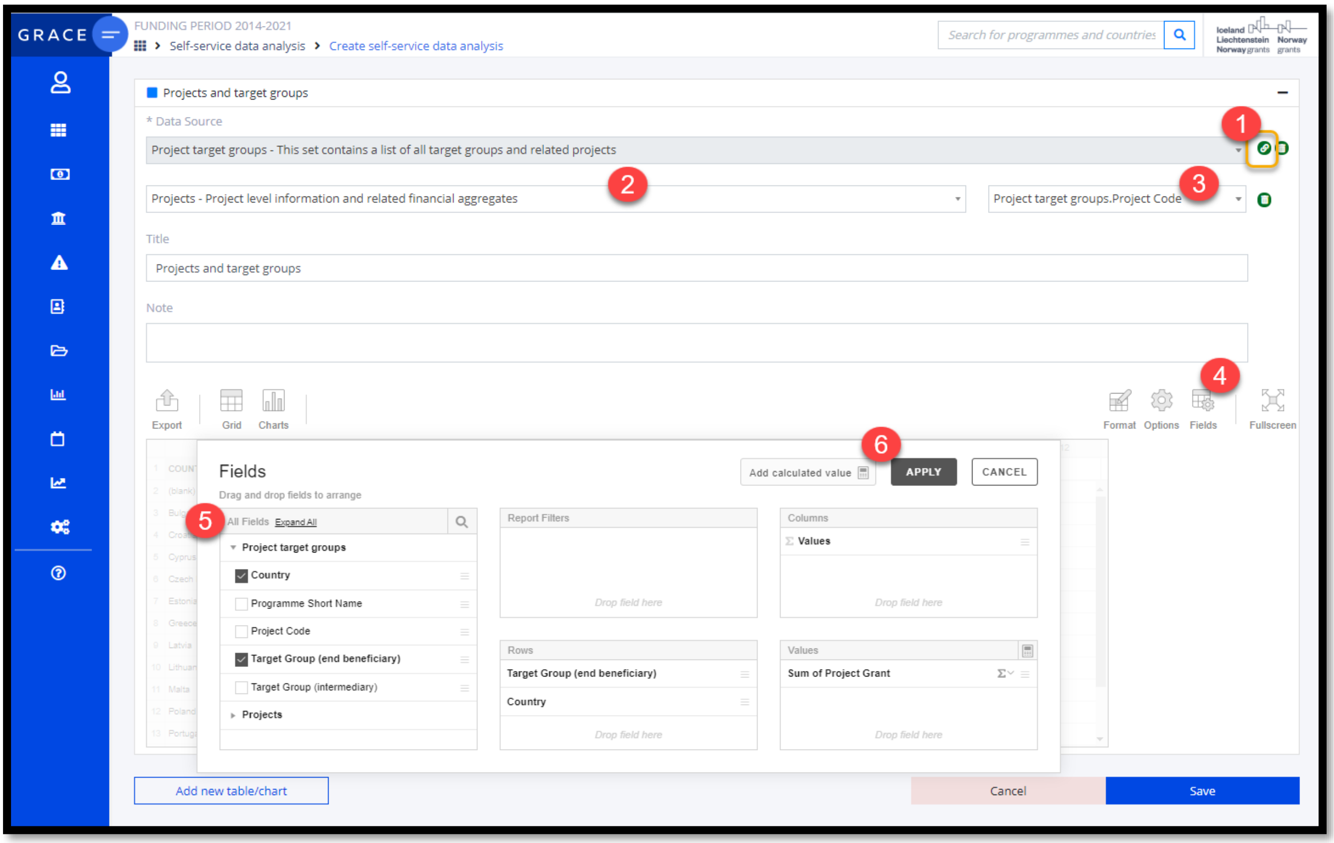
Self-service data analysis allows users to combine information from several data sources in one visualisation by joining them (full join). Using this feature **requires a good understanding of the relevant data and its structure**. Please don't hesitate to ask for help from the FMO Reporting and Data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

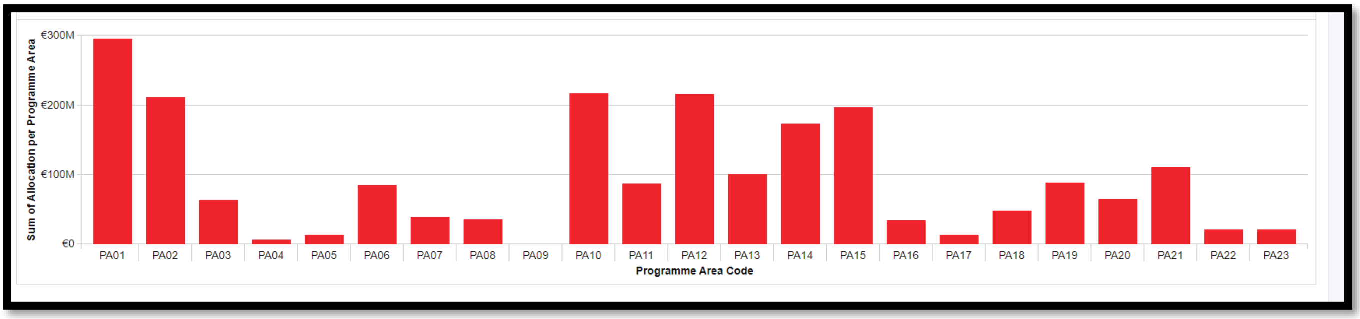
- Click **Fields (4)** to configure the rows and the columns for the report.
- Expand **(5)** the fields of the DataMart tables to select the needed ones for the report.
- When your selection is ready, press Apply **(6)**

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

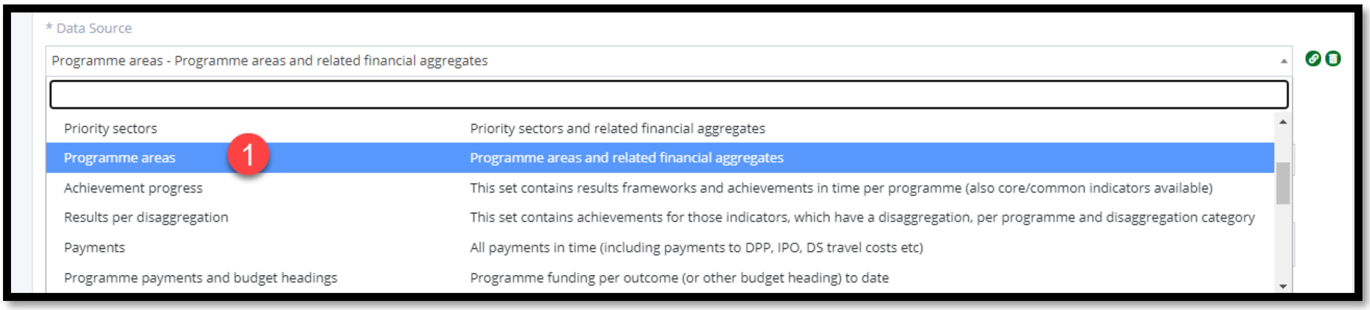


# 4. Example analysis – Programme area allocation

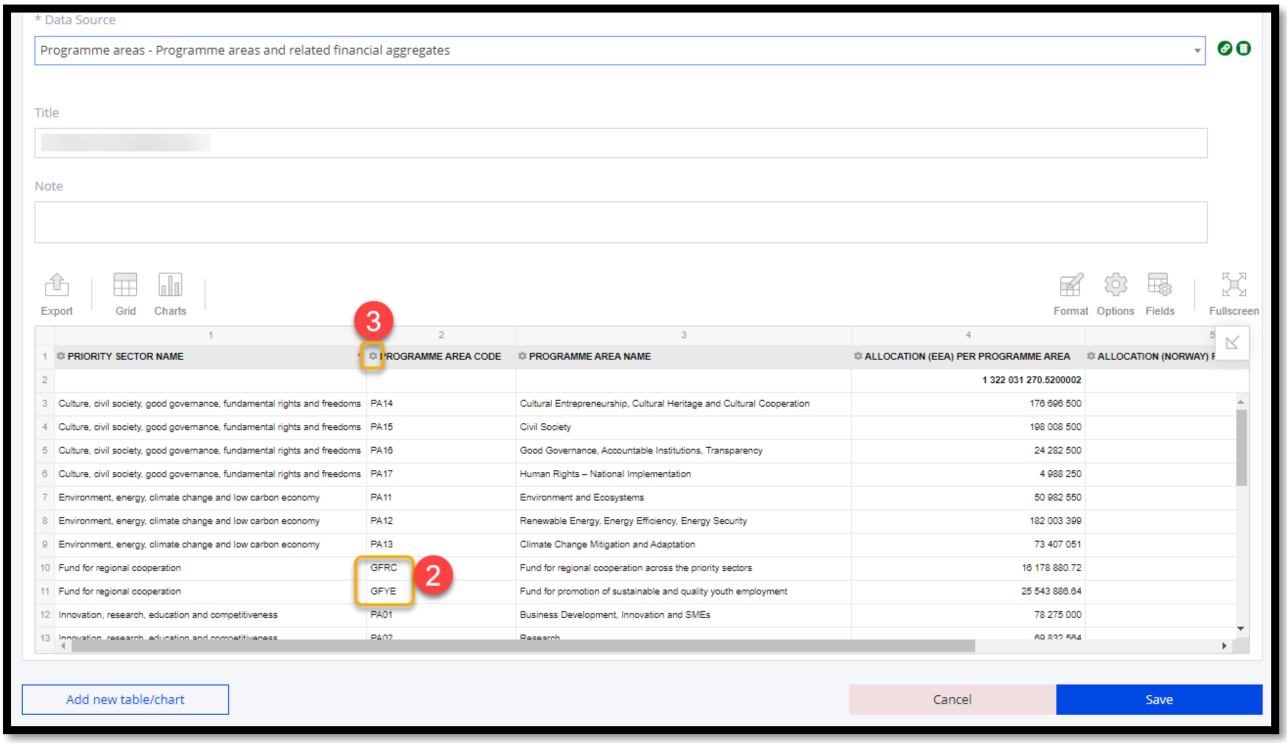
Below you can see the steps needed for producing this example visualisation, which illustrates how funding in the entire EEA & Norway Grants Financial Mechanism 14-21 is allocated to different Programme Areas:



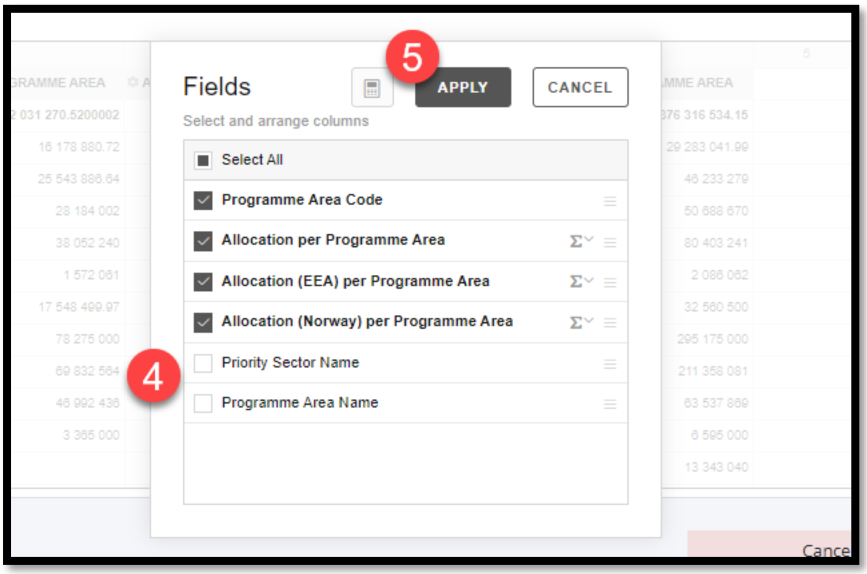

- Choose *Programme areas* **(1)** as the data source. A default grid selection opens (flat layout in this case).



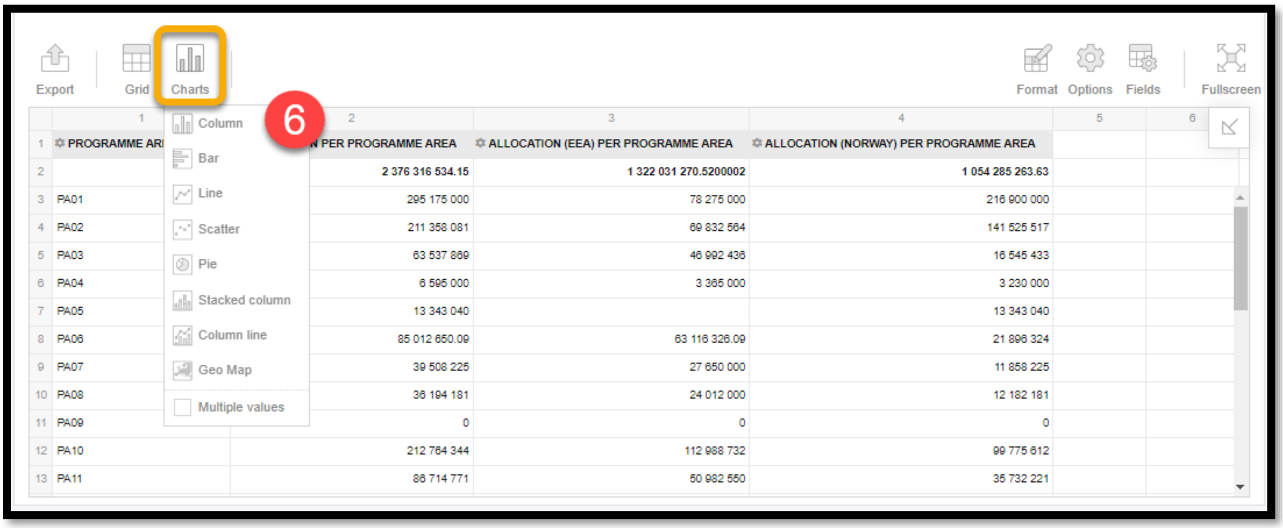

- Some programmes don't fit well into the Programme Area classification (for example Regional Funds). You might want to filter out the "Other categories" **(2)** by clicking on the gear symbol **(3)** and selecting only those which start with "PA"



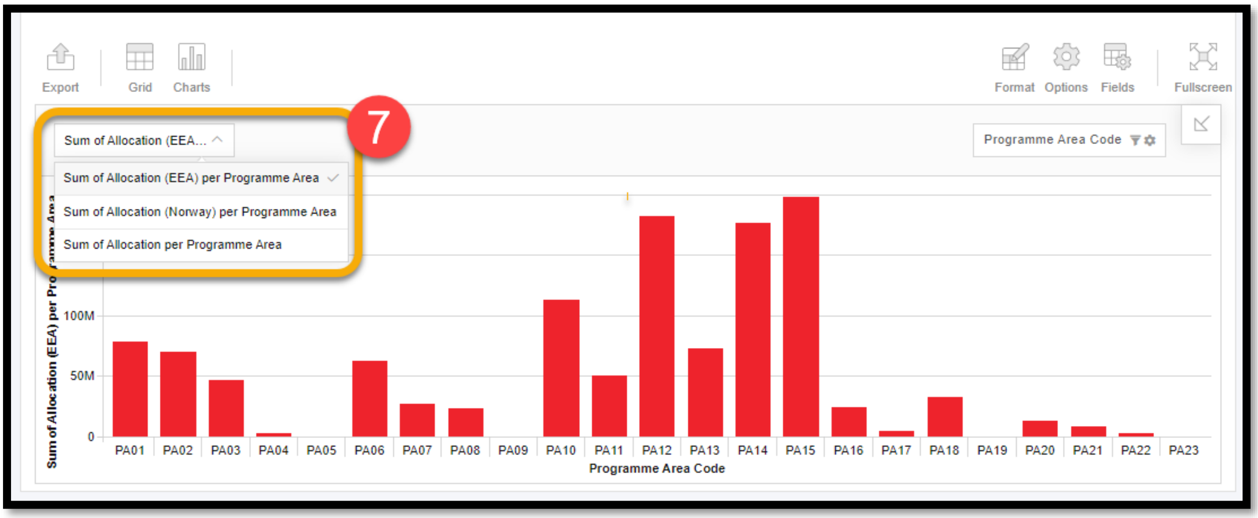
- Choose how to present your data – for example you can deselect the fields *Priority Sector Name* and *Programme Area Name* **(4).** You can also grab and drag the fields to rearrange them as you like. When you're done, hit apply **(5)**




- 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 | | | |
| Funding Period | x | | 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 | |
| Filter: Project Organisation (Yes/No) | | | x | |
| Funding Period | x | | x | |
| Organisation | 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 | |
| Programme Code | x | | x | |
| Project Code | x | | x | |

## 5.2. Theme: Finance

### 5.2.1. Data source: Forecasts

NB. 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 | |
| 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 |
| Forecasted Amount EEA | | x | | |
| Forecasted Amount Norway | | x | | |
| Forecasted Amount Total | | x | | |
| Forecasted Year | x | | x | |
| Funding Period | x | | x | |
| Programme Short Name | x | | x | |
| Status of the Forecast | x | | x | |

### 5.2.2. Data source: Payments

| Field name | Can be used in rows / columns | Can be used as a value | Can be used as a filter | Note |
|---|---|---|---|---|
| Approved Date | x | | | |
| Beneficiary Type | x | | x | |
| BTO Reference | x | | x | |
| Country | x | | x | |
| Deadline IFR | x | | | |
| Disbursed | | x | | |
| Disbursed EEA | | x | | |
| Disbursed Norway | | x | | |
| Financial Report Reference | x | x | x | When used as a value (distinct count) you get the number of financial reports in your selection |
| Financial Report Type | x | | x | |
| Funding Period | x | | x | |
| Incurred | | x | | |
| Incurred EEA | | x | | |
| Incurred End Date | x | | | |
| Incurred Norway | | x | | |
| Incurred Start Date | x | | | |
| Interest Earned | | x | | |
| Interest Earned EEA | | x | | |
| Interest Earned Norway | | x | | |
| Organisation (non-programme related payments) | x | | x | |
| Payment Date | x | | | |
| Processing Status | x | | x | |

| | | | | |
|---|---|---|---|---|
| Programme Short Name | x | | x | |
| Proposed Expenditures End Date | x | | | |
| Proposed Expenditures Start Date | x | | | |
| Requested | | x | | |
| Requested Co-Financing | | x | | |
| Requested EEA | | x | | |
| Requested 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 |
|---|---|---|---|---|
| Budget Heading Category | x | | x | |
| Budget Heading Title | x | x | x | When used as a value (distinct count) you get the number of budget headings in your selection |
| Country | x | | x | |
| Disbursed | | x | | |
| Incurred | | x | | |
| Incurred Description | x | | x | |
| Outcome | x | | x | |
| Payment Category | x | | x | |
| Payment Date | x | | | |
| Payment Reference | x | | | |
| Payment Status | x | | x | |
| Programme Area Code | x | | x | |
| Programme Short Name | x | | 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 | |
| Budget Heading Title | x | | x | |
| Co-Financing | | x | | |
| Country | x | | x | |
| Disbursed | | x | | |
| Eligible Expenditure | | x | | |
| Financial Mechanism | x | | x | |
| Funding Period | x | | x | |
| Grant | | x | | |
| Incurred | | x | | |
| Outcome | | x | | |
| Programme Area Code | x | | x | |
| Programme Short Name | x | | x | |

### 5.2.5. Data source: Work plans

| 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 | | |
| Funding Period | x | | x | |
| Miscellaneous Paid | | x | | |
| Miscellaneous Workplan | | x | | |
| Organisation | x | | x | |
| Organisation Short Name | x | | x | |
| Programme Code | x | | x | |
| Salary Paid | | x | | |
| Salary Workplan | | x | | |
| Submitted Date | x | | | |
| Total Paid | | x | | |
| Total Workplan | | x | | |
| Travel Paid | | x | | |
| Travel Workplan | | x | | |
| Workplan | x | | x | |
| Workplan Status | x | | x | |
| 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 | 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 per country | | x | | |
| Funding Period | x | | x | |
| Gross Allocation (EEA) per country | | x | | |
| Gross Allocation (Norway) per country | | x | | |
| Gross Allocation per country | x | | | |
| MOU Signature Date (EEA) | x | | | |
| MOU Signature Date (Norway) | | x | | |
| Net Allocation (EEA) per country | | x | | |
| Net Allocation (Norway) per country | | x | | |
| Net Allocation per country | | 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 (NO) | | 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 | | |
| Funding Period | 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 | |

# 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 |
|---|---|---|---|---|
| Bilateral Initiative Code | x | x | x | When used as a value (count or distinct count) you get the number of bilateral initiatives in your selection |
| Bilateral Initiative Completed Date | x | | | |
| Bilateral Initiative Cooperation Continue | x | | | |
| Bilateral Initiative Deviation Description | x | | | |
| Bilateral Initiative Grant | | x | | |
| Bilateral Initiative Implementation End Date | x | | | |
| Bilateral Initiative Implementation Start Date | x | | | |
| Bilateral Initiative Initial Description | x | | | |
| Bilateral Initiative Name | x | | x | |
| Bilateral Initiative Partners | x | | x | |
| Bilateral Initiative Results Description | x | | | |
| Bilateral Initiative Status | x | | x | |
| Bilateral Initiative 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 | |
| Funding Period | x | | 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 | |

### 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 Received in calls | | x | | |
| Call Amount | | x | | |
| Call Created Date | x | | | |
| Call Level (Country/Programme) | 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 (Yes/No) | | | x | |
| Filter: Relaunched call (Yes/No) | | | x | |
| Filter: Rolling call (Yes/No) | | | x | |
| Financial Mechanism | x | | x | |
| Funding Period | x | | x | |
| Grant Applied for in calls | | x | | |
| Grant Awarded in calls | | x | | |
| Initial Call Submission Date | x | | | |
| Last Call UpDate Date | x | | | |
| Number of applications approved for funding | | x | | |
| Number of applications approved for funding with a dpp | | x | | |
| Number of applications approved for funding with a dpp from Iceland | | x | | |
| Number of applications approved for funding with a dpp from Liechtenstein | | x | | |
| Number of applications approved for funding with a dpp from Norway | | x | | |
| Number of applications on the reserve list | | x | | |
| Number of applications received with a donor project partner | | x | | |
| Number of applications rejected for non-compliance with criteria | | x | | |
| Number of projects contracted from the reserve list in calls | | x | | |
| Number of projects contracted in calls | | 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 |
|---|---|---|---|---|
| Country | x | | x | |
| Disbursed | | x | | |
| Disbursed (EEA) | | x | | |
| Disbursed (Norway) | | x | | |
| Donor Programme Partner DPP | x | | 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 | |
| Funding Period | x | | x | |
| Grant (EEA) per Programme | | x | | |
| Grant (Norway) per Programme | | x | | |
| Grant per Programme | | x | | |
| Host Programme Area | x | | x | |
| Incurred | | x | | |
| Incurred (EEA) | | x | | |
| Incurred (Norway) | | x | | |
| International Programme Organisation (IPO) | x | | x | |
| Programme Agreement Signature Date | | x | | |
| Programme Co-Financing | | x | | |
| Programme Grant Rate | | x | | |
| Programme Name | 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 | |

### 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 | |
| Funding Period | 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 |
|---|---|---|---|---|
| Call | x | | x | |
| Country | x | | x | |
| Filter: Best Practice Project (Yes/No) | | | x | |
| Filter: dpp Project (Yes/No) | | | x | |
| Filter: Predefined Project (Yes/No) | | | x | |
| Filter: Project Published (Yes/No) | | | x | |
| Filter: Project Reviewed (Yes/No) | | | x | |
| Financial Mechanism | x | | x | |
| Funding Period | x | | x | |
| Implementation Modality | x | | x | |
| Policy marker filter: Antidiscrimination (Relevant/Fundamental/Non-applicable) | | | x | |
| Policy marker filter: Gender Equality (Relevant/Fundamental/Non-applicable) | | | x | |
| Policy marker filter: Roma (Relevant/Fundamental/Non-applicable) | | | x | |
| Policy marker filter: Transparency (Relevant/Fundamental/Non-applicable) | | | x | |
| Policy marker filter: Vulnerable Groups (Relevant/Fundamental/Non-applicable) | | | x | |
| Priority Sector Code | x | | x | |
| Programme Area Code | 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 Date | x | | x | |
| Project Eligible Expenditure | | x | | |
| Project Grant Rate | x | x | x | |
| Project Grant | | x | | |
| Project Initial Description | x | | | |
| Project Location | x | | x | |
| Project Location NUTS 0 | x | | x | |
| Project Location NUTS 1 | x | | x | |
| Project Location NUTS 2 | x | | x | |
| Project Location NUTS 3 | x | | x | |
| Project Name | x | | x | |
| Project Outcome(s) | x | | x | |
| Project Results Description | x | | | |
| Project Sector | x | | x | |
| Project Sector Detailed | x | | x | |
| Project Signature Date | x | | | |
| Project Status | x | | x | |
| Project 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) | | | | |
| Funding Period | x | | x | |
| Programme Code | x | | x | |
| Risk Actual Response | x | | | |
| Risk Assessment Type | 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 |
| Risk Future Planned Response | x | | | |
| Risk Likelihood | | x | | |
| Risk Planned Response | x | | | |
| Risk Related To | x | | x | |
| Risk Report | x | | | |
| Risk Report Year | x | | x | |
| Risk Response Type | x | | x | |
| Risk Score | | x | | |
| Risk Type | 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 Source | x | | x | |
| 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 | |
| Funding Period | x | | 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 | | |
| 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 | | | | |
| 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 |
| Outcome | x | | x | |
| Output | x | | x | |
| Programme Area Code | x | | x | |
| Programme Area Name | x | | x | |
| Programme Short Name | x | | x | |