GRACE Grants Administration and Collaboration Environment

Self-service data analysis

GrACE User manual

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1. Introduction

This document aims to instruct GrACE users on how to use self-service data analysis (SSDA).

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[1]. 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
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.

[1] 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.

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[2]
- Modify their data analyses (ie. those created or cloned by themselves)
- Save, export and share a data analysis with other users[3]

TIP FOR EXCEL USERS

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

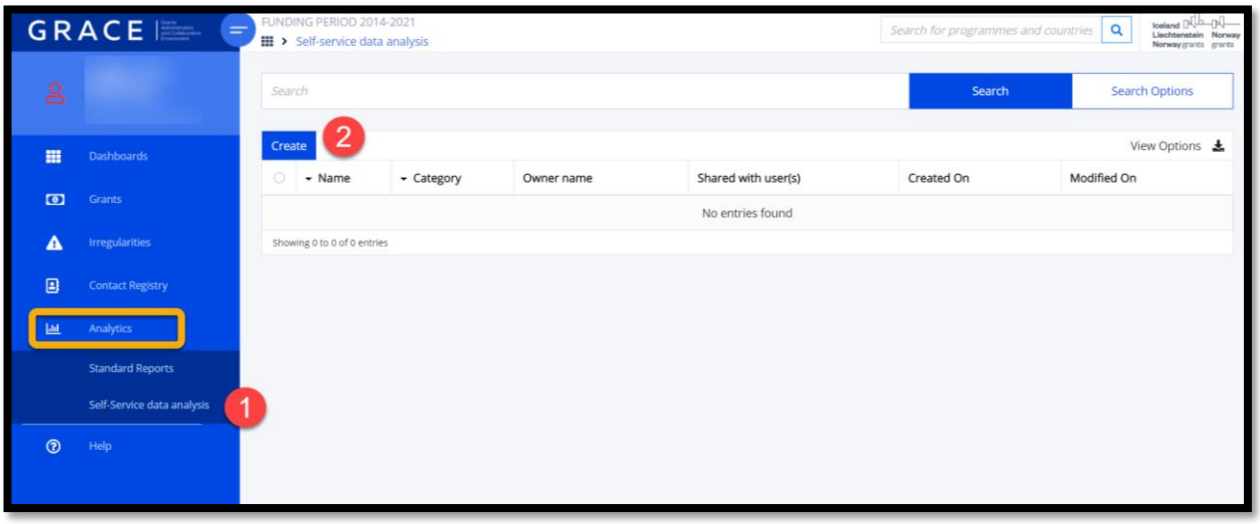
REPORTING SUPPORT

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:

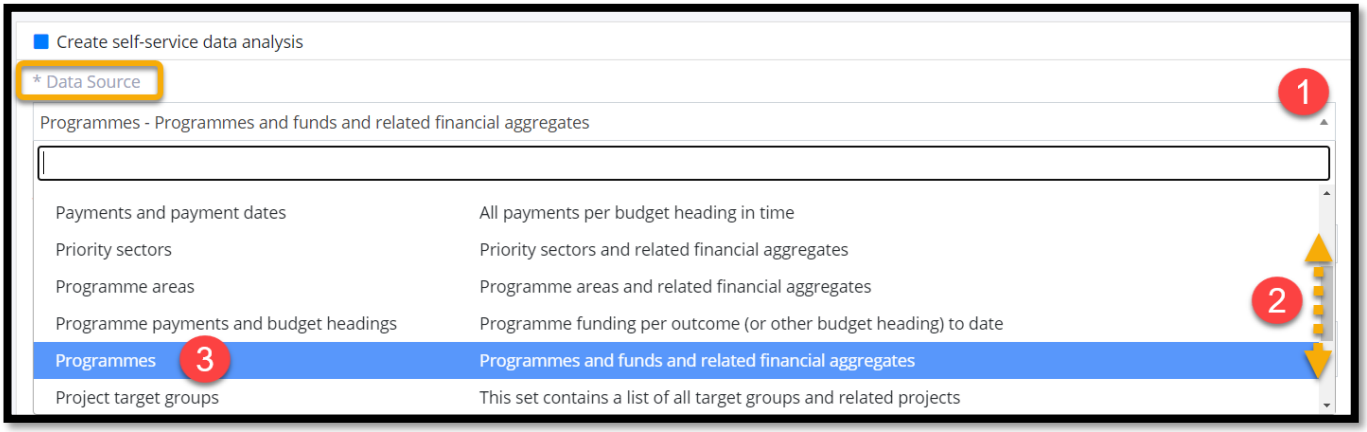
- Choose a data source
- Choose which fields to present and how
- Add a title and description to each visualisation, to document what is presented in the table/graph.

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

[3] 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.

3.2. Choose a data source

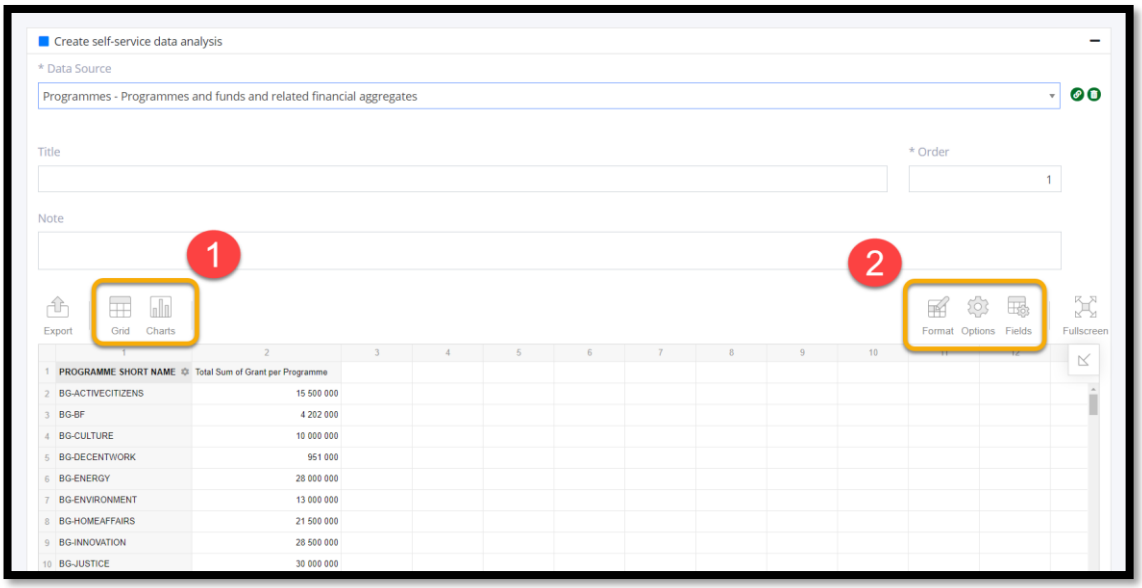
The user is asked to select a data source from a collection of tables **(1-2-3).** On the left you see the name of a data source (here: *Programmes*) and on the right its description (here: *Programmes and funds and related financial aggregates*).



3.3. Set up your visualisation

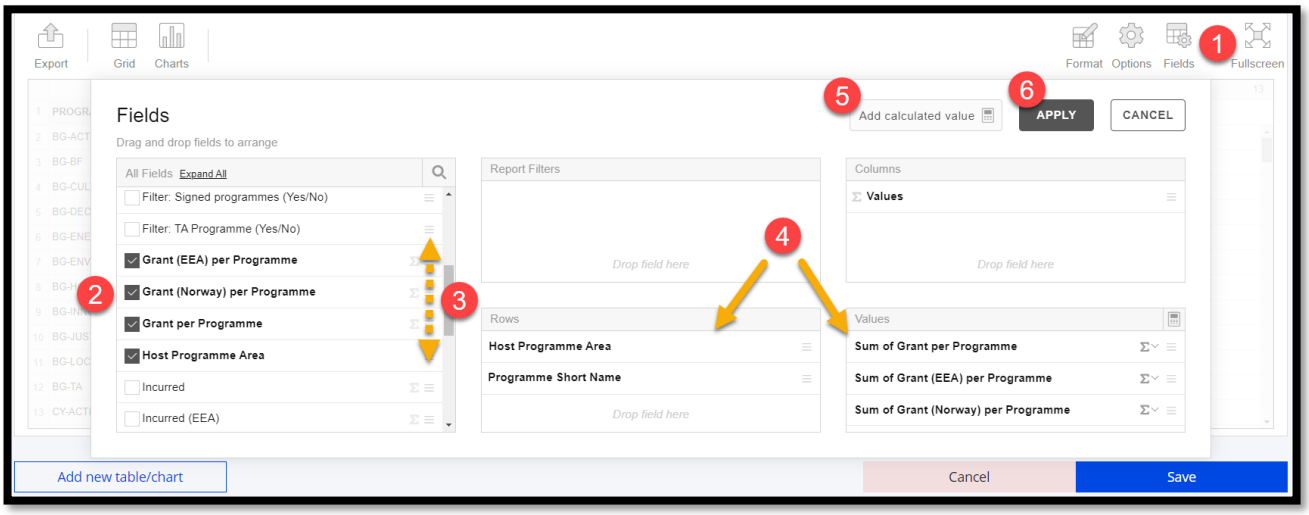
Once a data source is selected, the tool will present a default table setup for that specific source. The user will then make the desired changes by for example

(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)



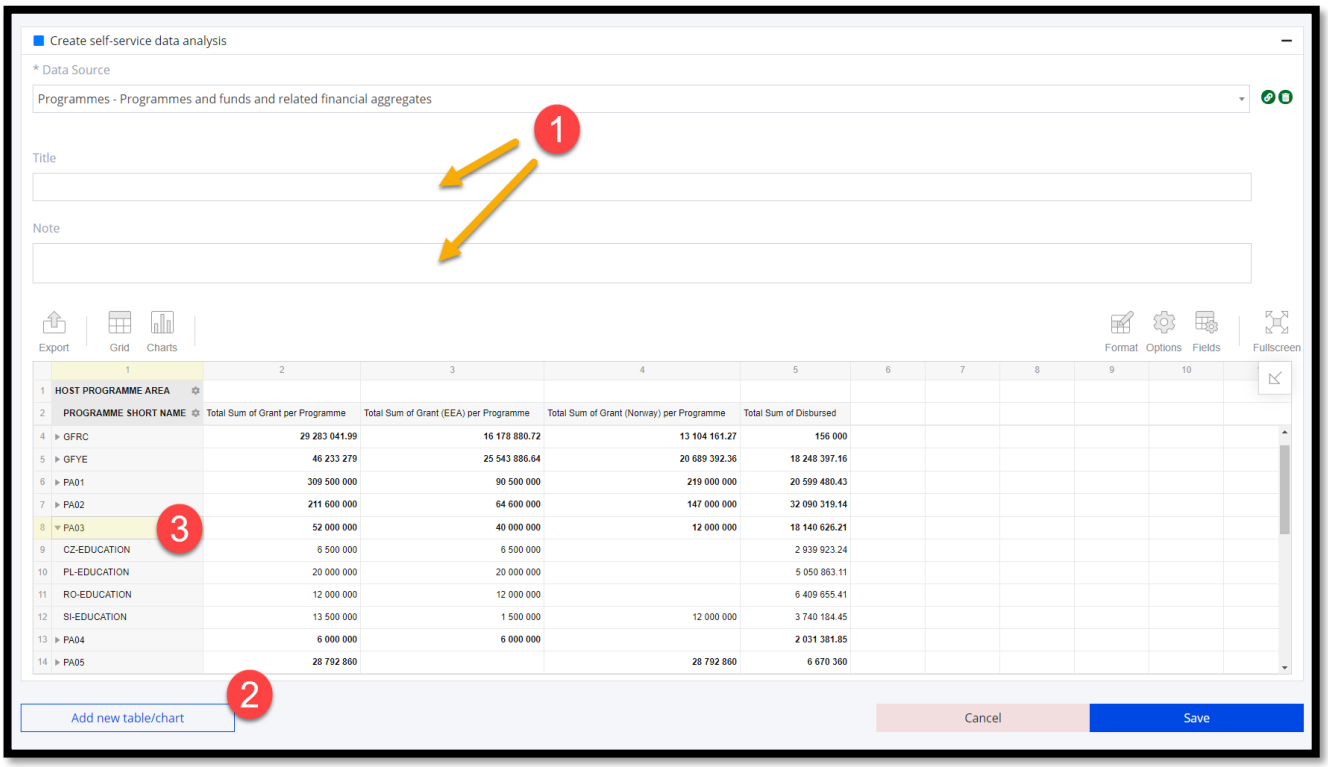
By opening the “Fields” menu **(1)**, the user can

- 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.



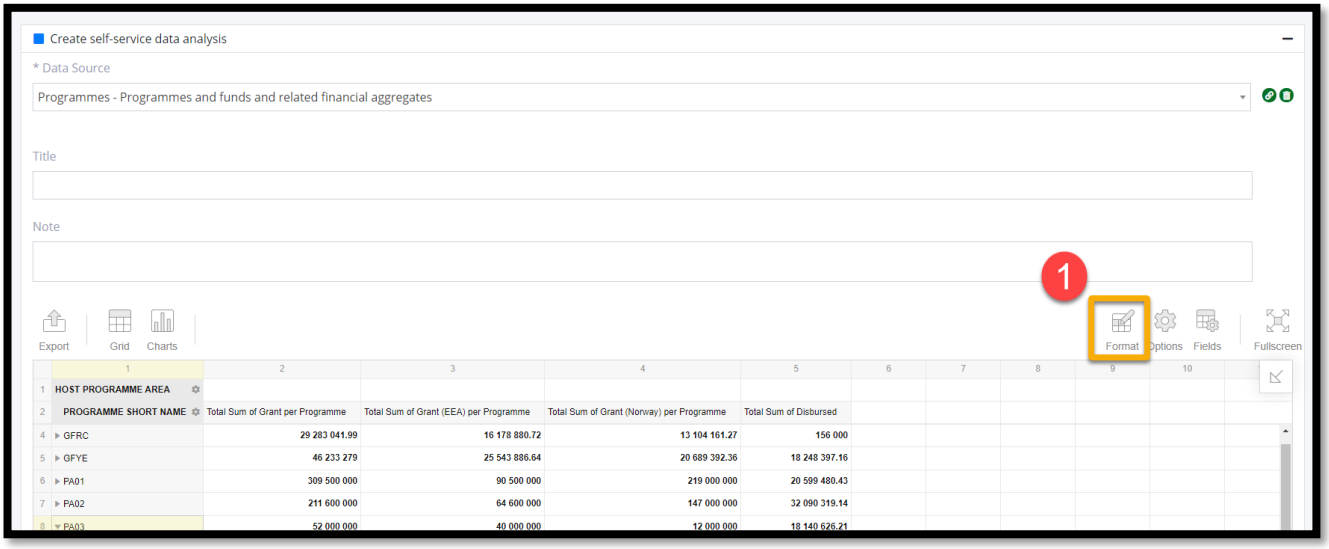
Once the analysis is done, give it a title and description to clarify what the analysis shows **(1)**. You can also continue to add a new table/chart by clicking the button at the bottom **(2).**

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.



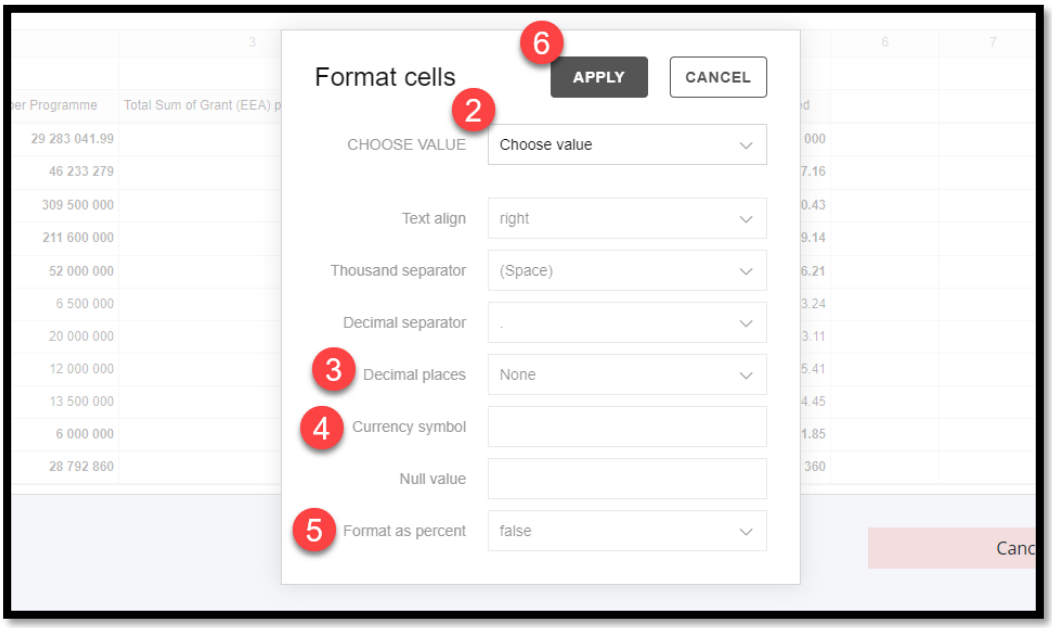
3.4. Formatting numerical values

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)**

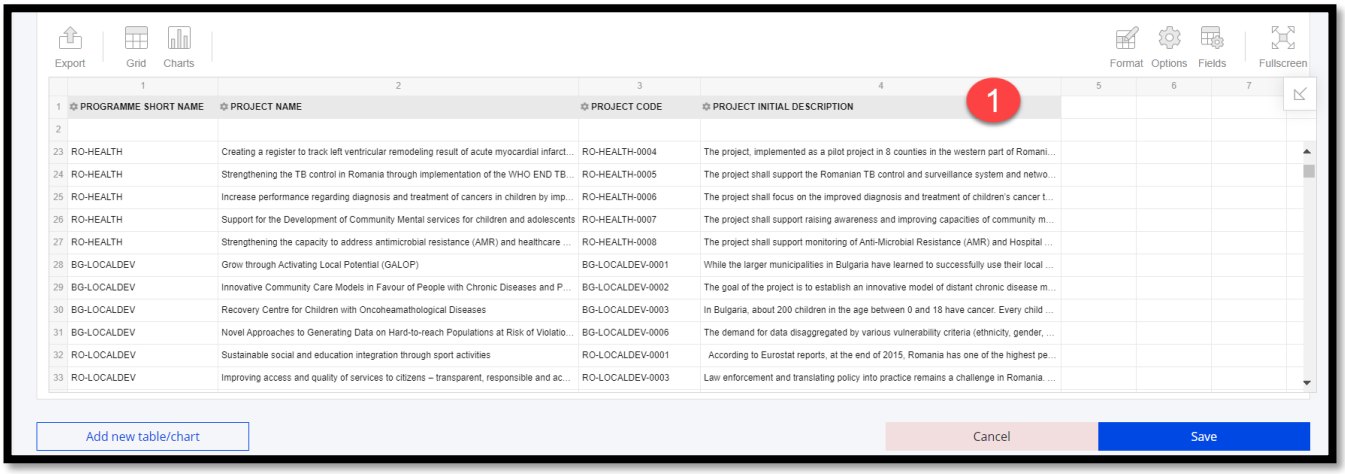


You can also change your visualisation to a graph and keep the selected number formatting.

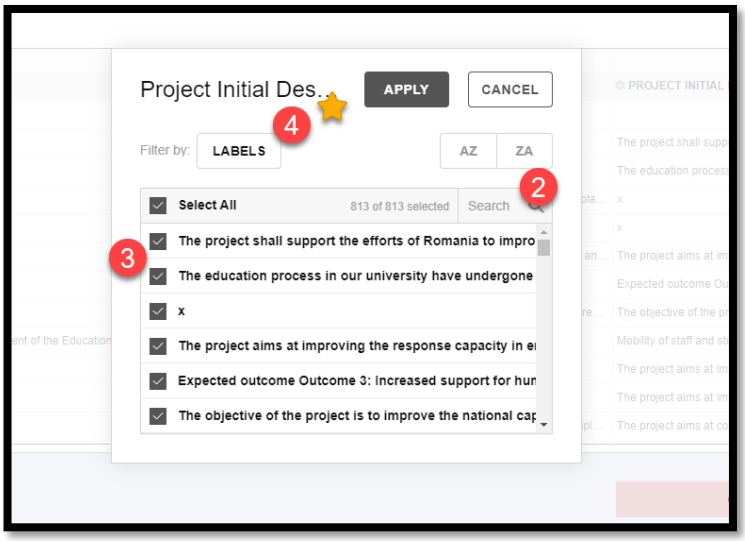
3.5. Filtering

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"

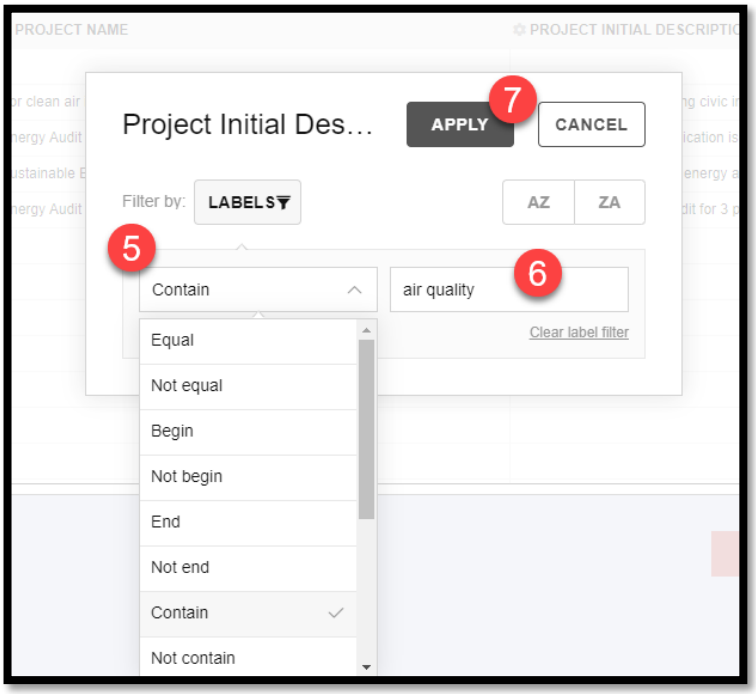
- In the flat grid (selecting fields is described in section 3.3.), click on the title **(1)**

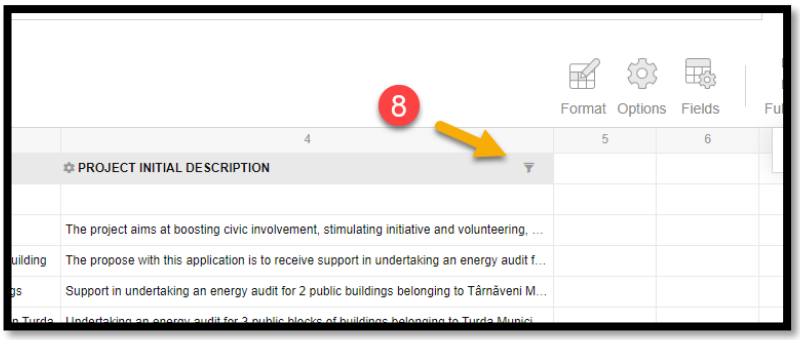


- A pop-up window appears, where you can either
  - search for specific words **(2),**
  - manually select the descriptions you want to include **(3),**
  - or click on the button *Labels* **(4)** to create a rule for filtering project descriptions
    - this will automatically include any new projects 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)**
  - Hit apply **(7)**
  - A filter symbol on the description title indicates that this field is being filtered **(8).**


PROJECT NAME
PROJECT INITIAL DESCRIPTIO
Project Initial Des…
APPLY
CANCEL
7
Filter by:
LABELS
AZ
ZA
5
Contain
air quality
6
Clear label filter
Equal
Not equal
Begin
Not begin
End
Not end
Contain
Not contain


Format
Options
Fields
8
4
5
6
PROJECT INITIAL DESCRIPTION
The project aims at boosting civic involvement, stimulating initiative and volunteering, …
The propose with this application is to receive support in undertaking an energy audit f…
Support in undertaking an energy audit for 2 public buildings belonging to Târnăveni M…

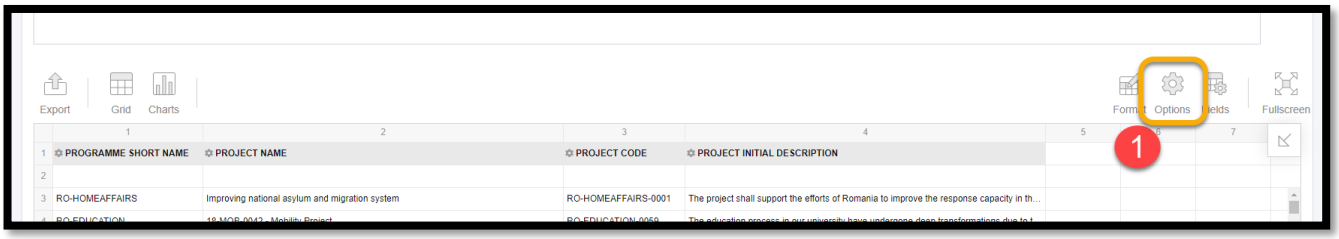
3.6. Grid layout options

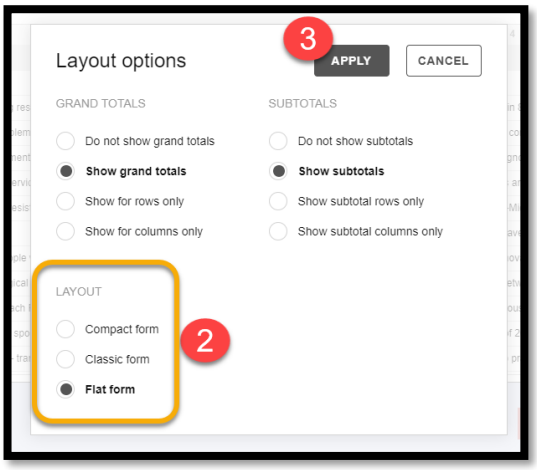
GrACE offers 3 alternative grid layout options. The first 2 can be used to summarise data, whereas the last one shows all possible rows in the selection:

a. Compact
b. Classic
c. Flat

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

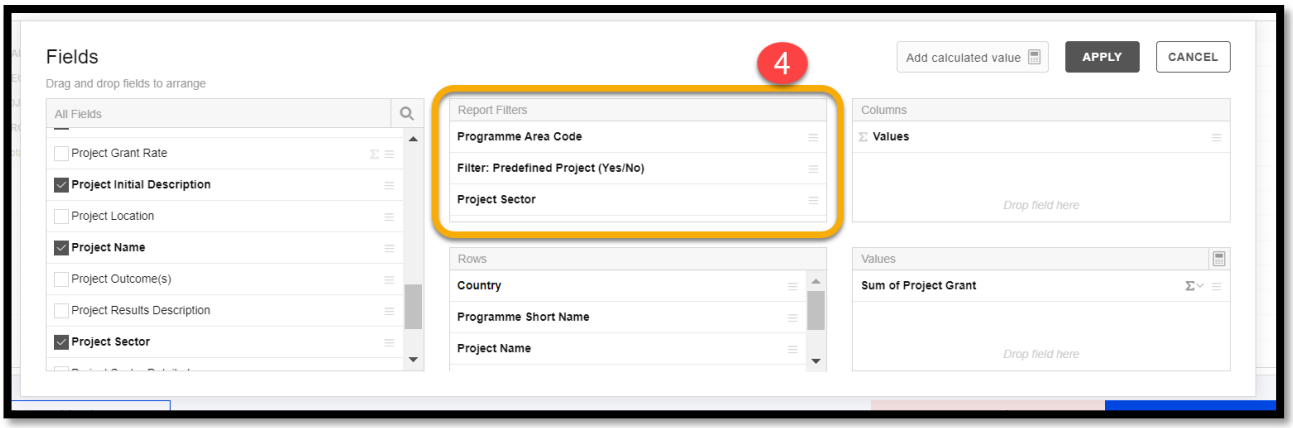
- Click “Options” **(1)**
- in the popup window choose either compact or classic layout **(2)** and hit “Apply” **(3)**





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.



3.7. 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:

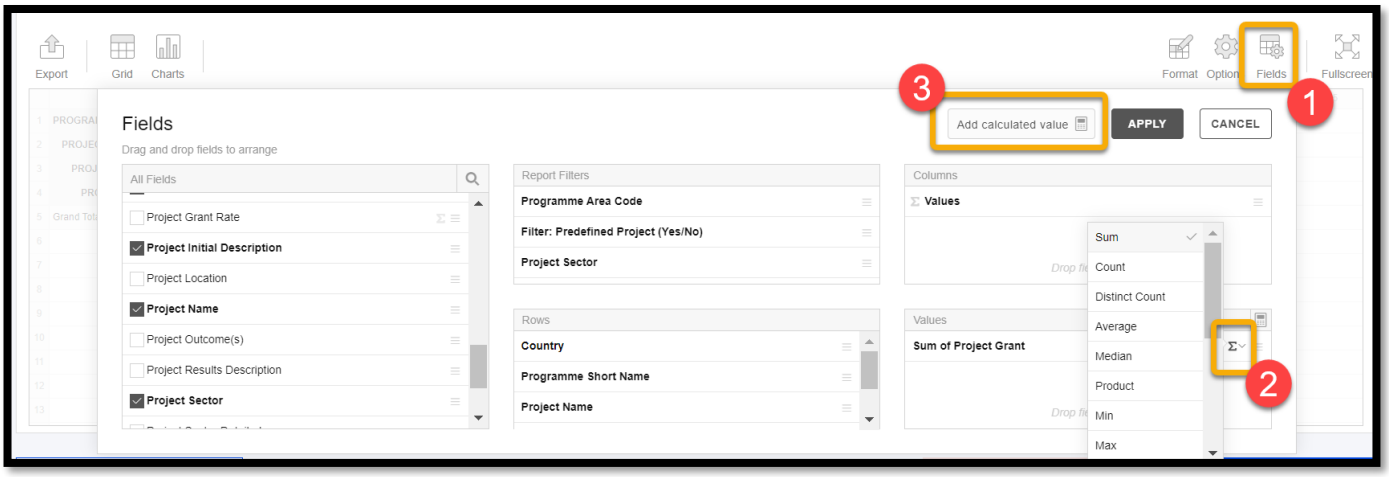
- Count (calculates the number of values e.g. number of countries)
- Distinct Count (calculates the number of individual values)

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

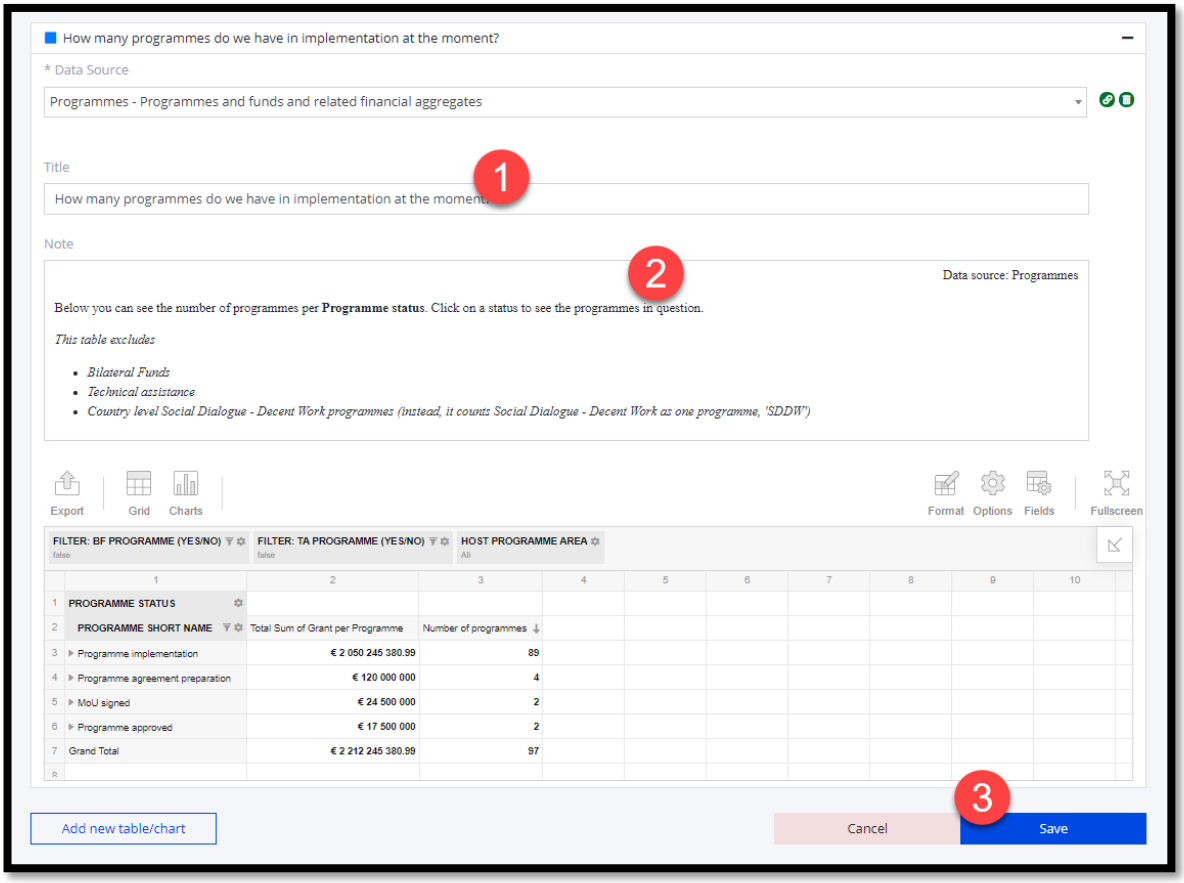
a. Fields **(1)** and then click on the sum symbol ∑ next to your value field **(2)**
b. Add a calculated value, where you can configure your own custom calculation **(3)**
    a. for example: (disbursed amount / programme grant) = disbursed rate %



3.8. Save, share & export

3.8.1 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:

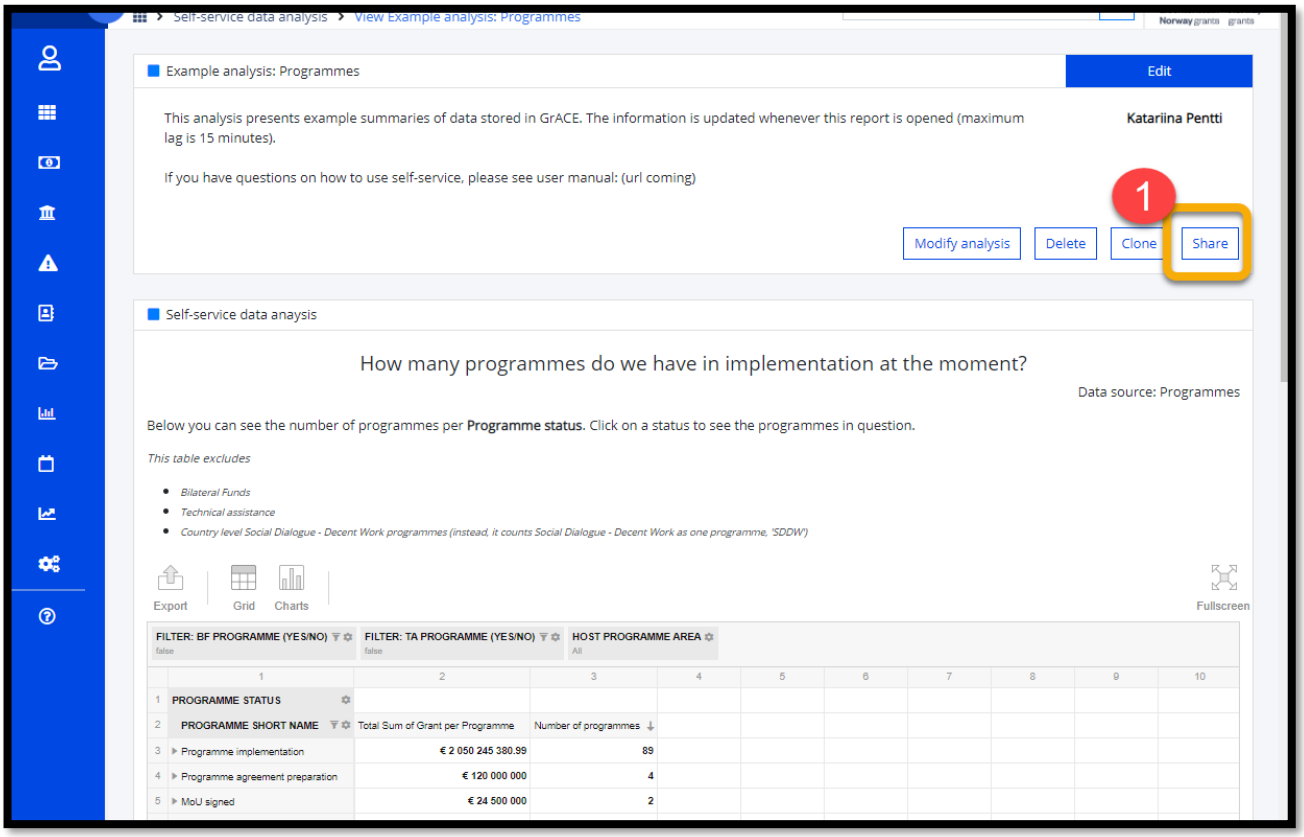
- Name – Here you give a name for the whole analysis (this is common for all the tables and graphs you added in the analysis)
- Category – optional, to help keep your analyses organised
- Description of the analysis - Here you give a description for the whole analysis (this is common for all the tables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

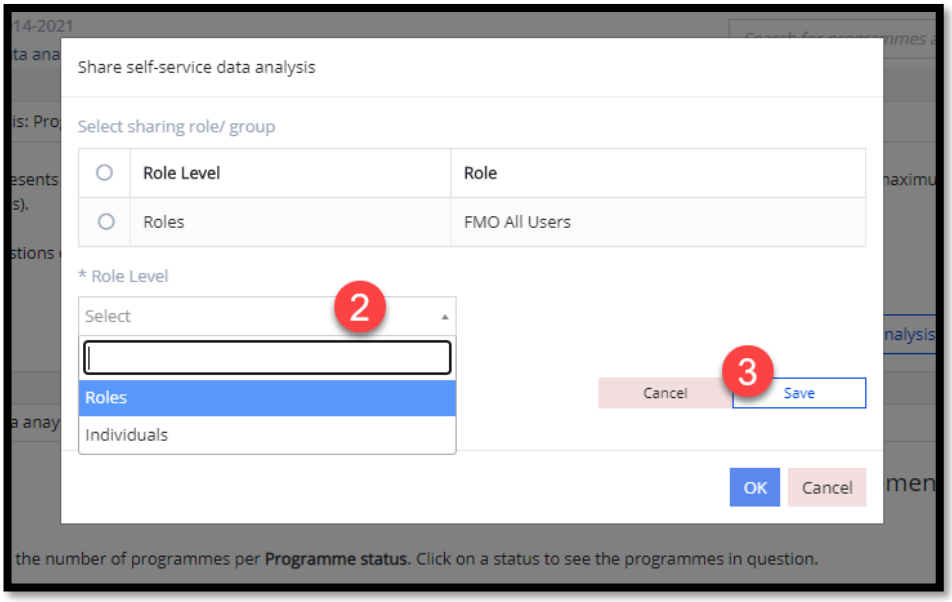
Then press OK to finish saving. By default, the analysis is only visible to the user who created it – next you can see how to make it visible to others.

3.8.2 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.



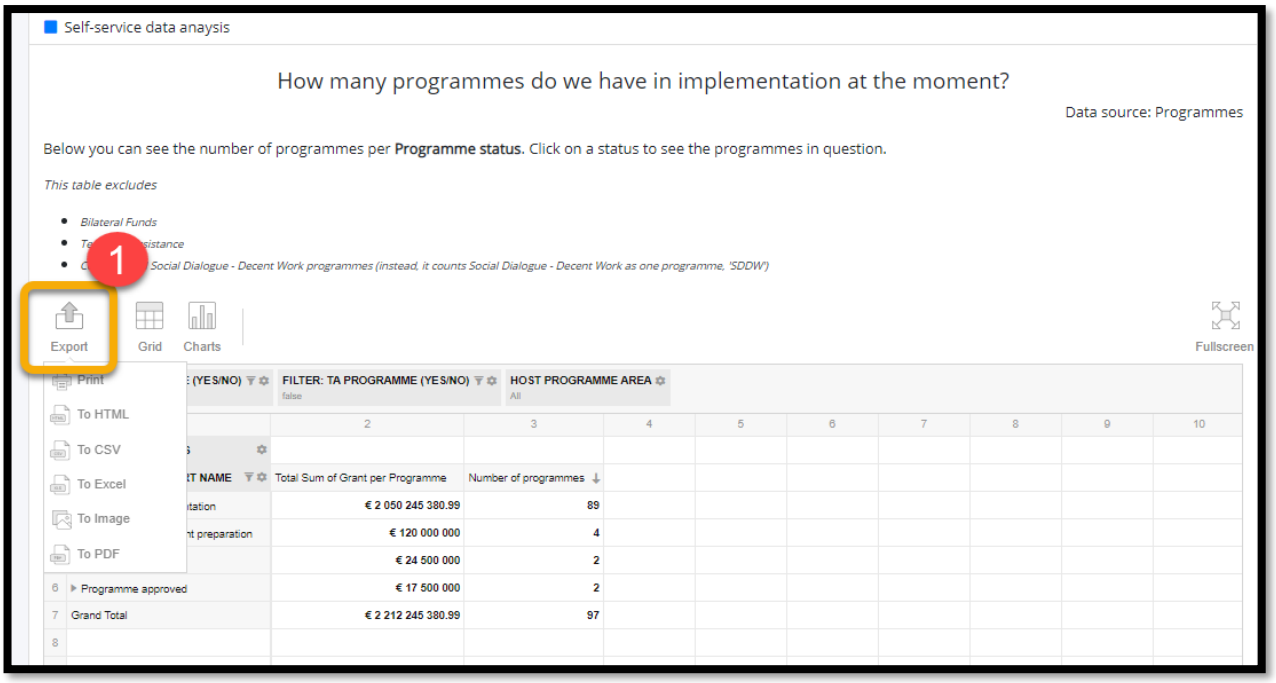


The other users will only see what is visible to them according to their user access, for example a Programme Operator will only see information related to their own programme.

3.8.3 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.

3.9. Clone & Modify

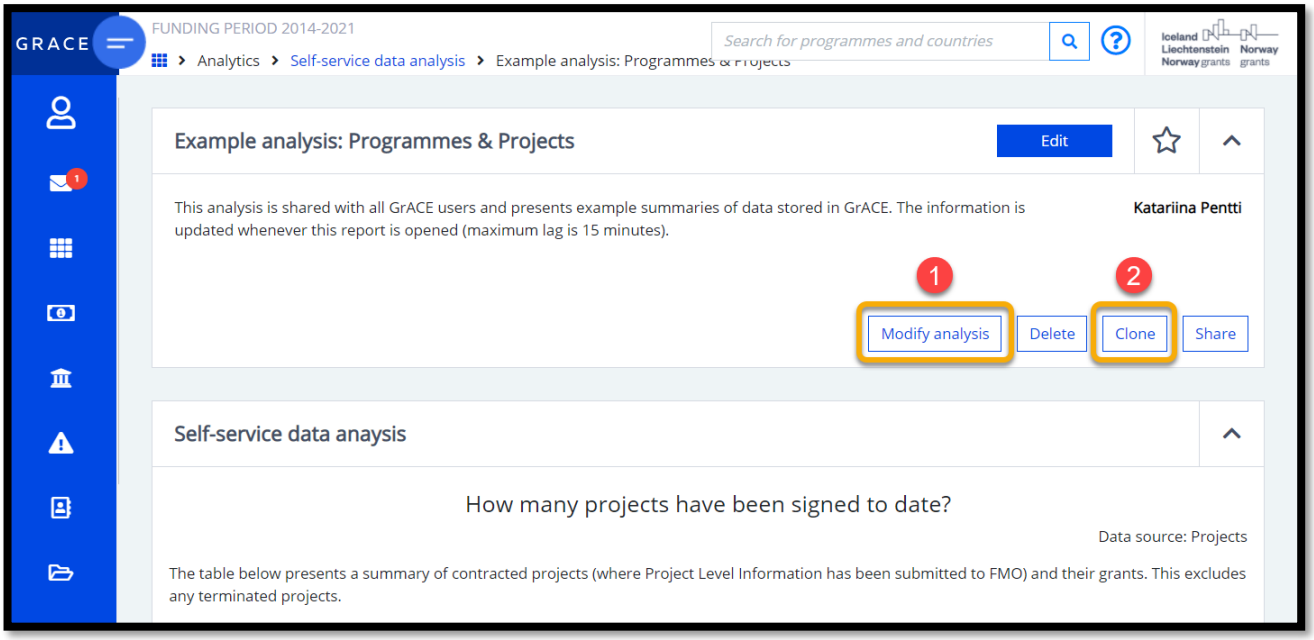
Once you've created and saved an analysis, you can always go back and make changes to it by clicking on *Modify analysis* (1).

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

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've created yourself), *Clone* creates a copy of the current analysis.



3.10. Advanced: join data sources

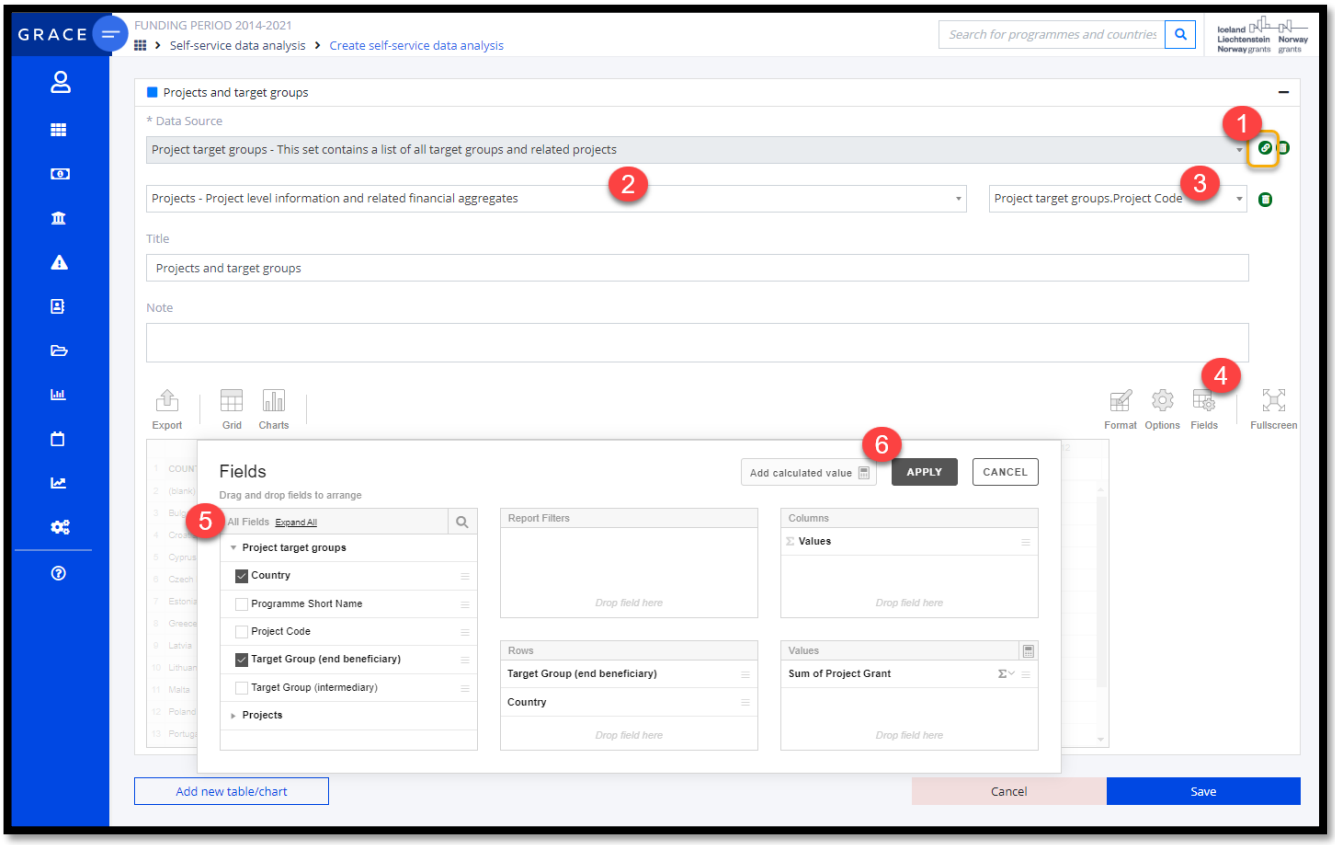
Self-service data analysis allows users to combine information from several data sources in one visualisation by joining them (left join). Using this feature **requires a good understanding of the relevant data and its structure**. Please don't hesitate to ask for help from the FMO Reporting and Data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

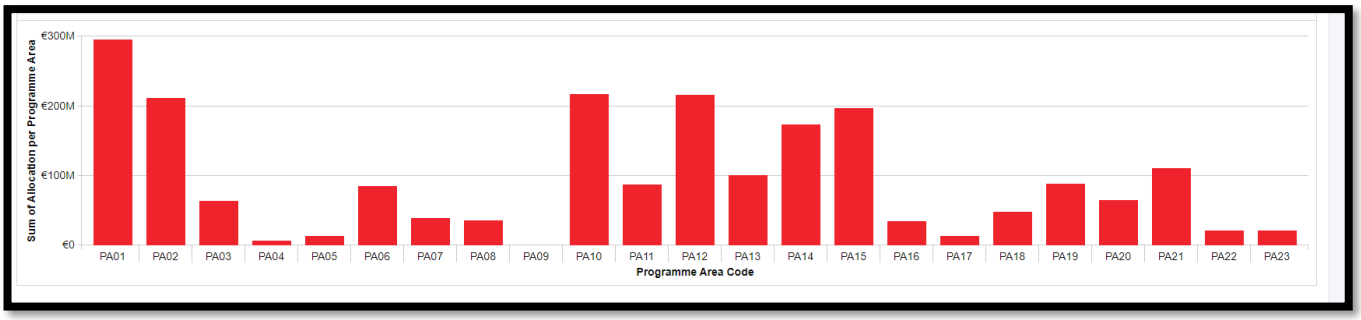
- Click **Fields (4)** to configure the rows and the columns for the report.
- Expand **(5)** the fields of the DataMart tables to select the needed ones for the report.
- When your selection is ready, press Apply **(6)**

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

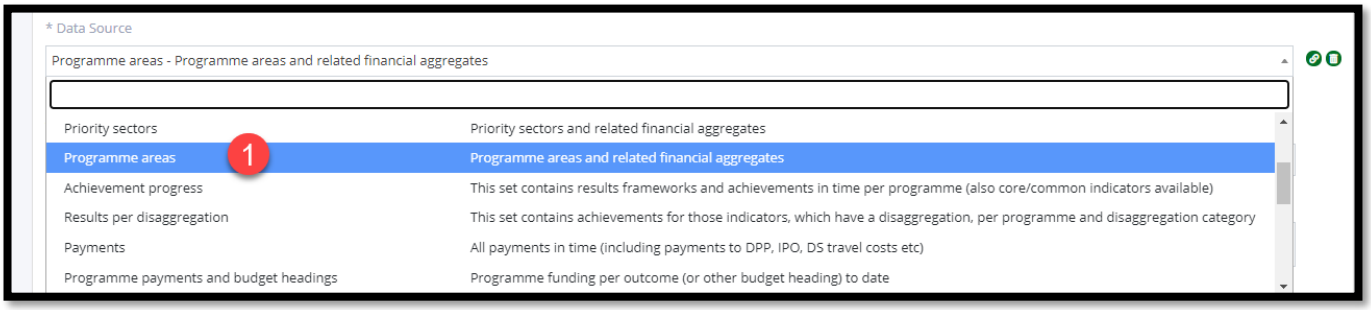

GRACE
FUNDING PERIOD 2014-2021
Self-service data analysis
Create self-service data analysis
Search for programmes and countries
Projects and target groups
* Data Source
Project target groups - This set contains a list of all target groups and related projects
Projects - Project level information and related financial aggregates
Project target groups.Project Code
Title
Projects and target groups
Note
Export
Grid
Charts
Format
Options
Fields
Fullscreen
Fields
Drag and drop fields to arrange
Add calculated value
APPLY
CANCEL
All Fields
Expand All
Project target groups
Country
Programme Short Name
Project Code
Target Group (end beneficiary)
Target Group (intermediary)
Projects
Report Filters
Drop field here
Columns
Values
Rows
Target Group (end beneficiary)
Country
Values
Sum of Project Grant
Add new table/chart
Cancel
Save
1
2
3
4
5
6

4. Example analysis – Programme area allocation

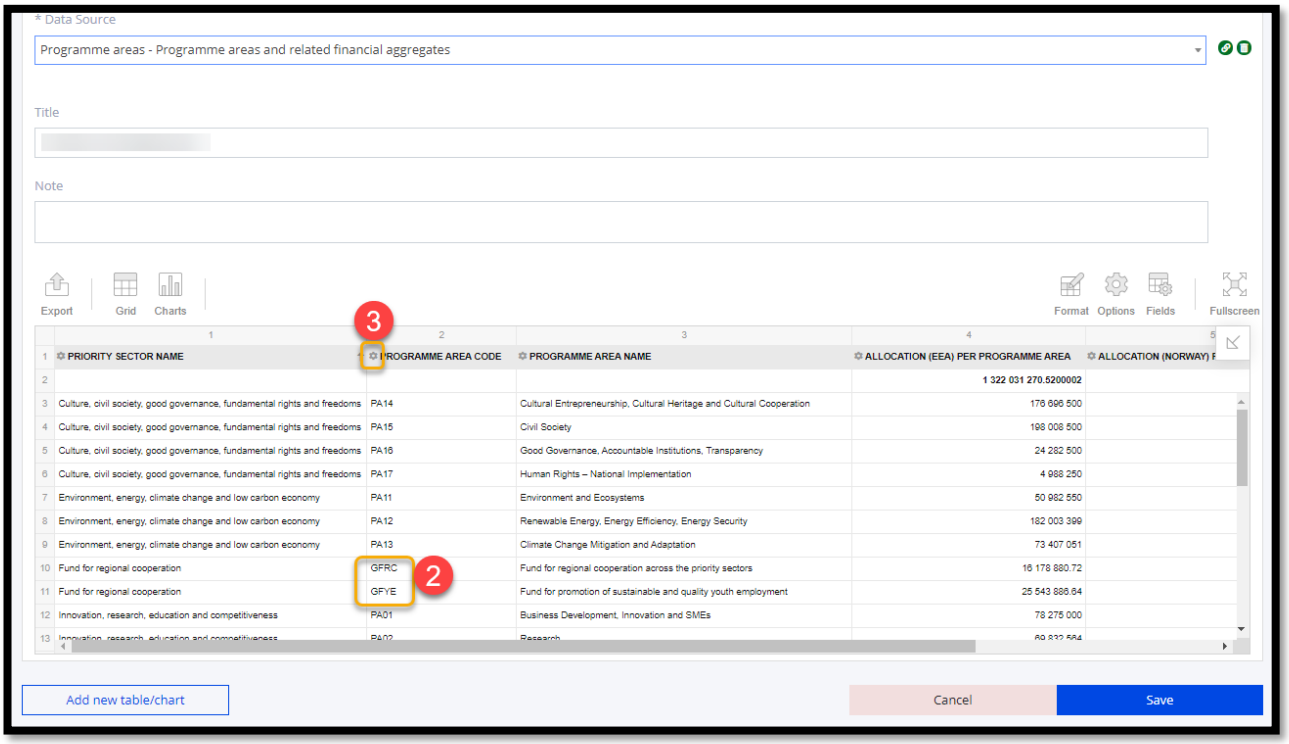
Below you can see the steps needed for producing this example visualisation, which illustrates how funding in the entire EEA & Norway Grants Financial Mechanism 14-21 is allocated to different Programme Areas:



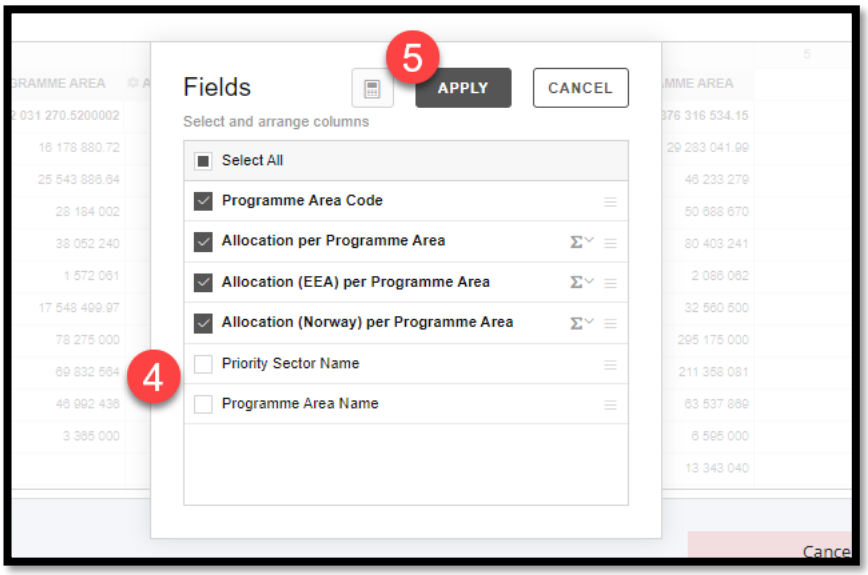
- Choose *Programme areas* **(1)** as the data source. A default grid selection opens (flat layout in this case).



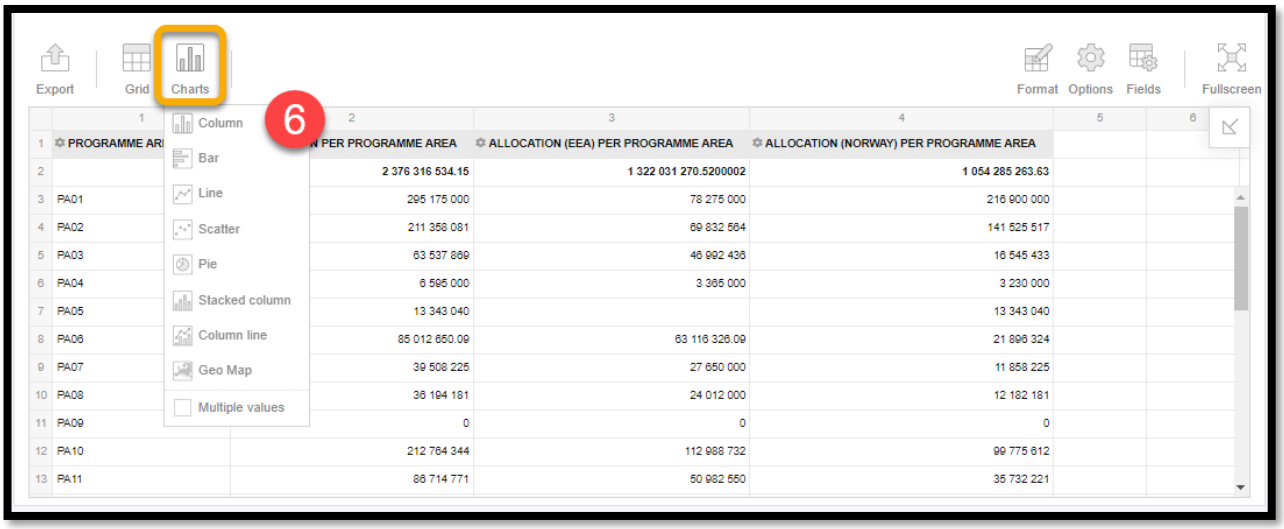
- Some programmes don't fit well into the Programme Area classification (for example Regional Funds). You might want to filter out the "Other categories" **(2)** by clicking on the gear symbol **(3)** and selecting only those which start with "PA"



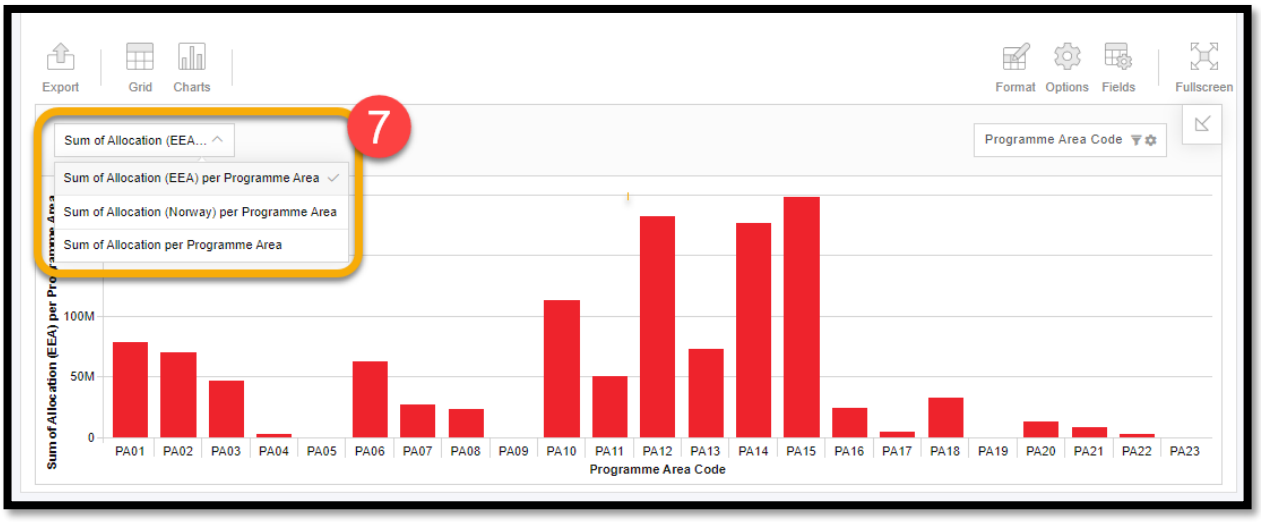
- Choose how to present your data – for example you can deselect the fields *Priority Sector Name* and *Programme Area Name* **(4).** You can also grab and drag the fields to rearrange them as you like. When you're done, hit apply **(5)**



- 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			
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	
Programme short name	x		x	
Forecast status	x		x	
Document submission month	x		x	
Document submission year	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
IFR approved date	x			
Beneficiary type	x		x	
BTO reference	x		x	
Country	x		x	
IFR submission deadline	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	
Incurred		x		
Incurred (EEA)		x		
Incurred (Norway)	x			
Incurred end date		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 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
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	
Financial Mechanism	X		x	
Payment date	x			
Payment reference	x			
Payment status	x		x	
Programme area code	x		x	
Programme short name	x		x	
Priority sector code	x		x	
Reported incurred		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	
Grant		x		
Incurred		x		
Outcome		x		

Programme area code	x		x	
Programme short name	x		x	
Priority sector code	x		x	
Reported incurred		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 continue	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	

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: Relaunched 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 call 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	
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	
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: 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	
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 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 results description	x			
Project sector	x		x	
Project sector detailed	x		x	
Project signature sate	x			
Status	x		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	