GRACE Grants Administration and Collaboration Environment

Self-service data analysis

GrACE User manual

Version 2.0, March 2021

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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 date¹. 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.

Norway

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 else²
- Modify their data analyses (ie. those created or cloned by themselves)
- Save, export and share a data analysis with other users³

TIP FOR EXCEL USERS

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

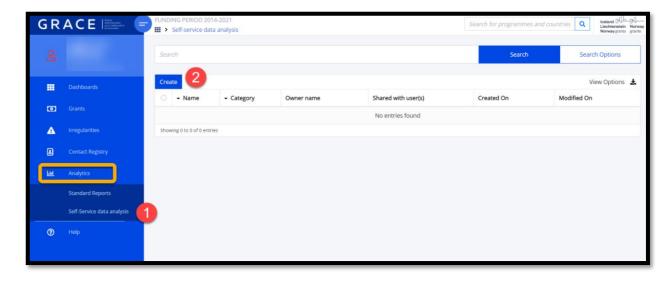
REPORTING SUPPORT

If you have any questions or you wish to make sure your analysis is correct, please contact **GrACE support** (<u>Grace.Support@efta.int</u>) 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:

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

Norway

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*).

Create self-service data analysis		
* Data Source		1
Programmes - Programmes and funds and related	financial aggregates	
Payments and payment dates	All payments per budget heading in time	•
Priority sectors	Priority sectors and related financial aggregates	<u> </u>
Programme areas	Programme areas and related financial aggregates	
Programme payments and budget headings	Programme funding per outcome (or other budget heading) to date	
Programmes 3	Programmes and funds and related financial aggregates	
Project target groups	This set contains a list of all target groups and related projects	-

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)

Data Source											
	10 1 1 1 1 1 0 10 1	1									- 00
Programmes - Programmes ar	id funds and related financi	al aggregate	S								
le										* Order	
											1
te											
	1										
									2		
											H
xport Grid Charts										Format Options Fields	Fullscr
_	2	3	4	5	6	7	8	9	10	11 12	K
PROGRAMME SHORT NAME	tal Sum of Grant per Programme										
BG-ACTIVECITIZENS	15 500 000										
BG-BF	4 202 000										
BG-CULTURE	10 000 000										
BG-DECENTWORK	951 000										
	28 000 000										
BG-ENERGY											
BG-ENVIRONMENT	13 000 000										
BG-ENVIRONMENT	13 000 000 21 500 000										
BG-ENERGY BG-ENVIRONMENT BG-HOMEAFFAIRS BG-INNOVATION											



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.

Ê						\$	₩,	1 🛙
Export	Grid Charts					Options	Fields	Fullscreen
1 PROGR.	Fields			E	Add calculated value	CANC	EL	
3 BG-BF	Drag and drop fields to arrange							
4 BG-CUL	All Fields Expand All	Q	Report Filters		Columns			
5 BG-DEC	Filter: Signed programmes (Yes/No)	= ^			∑ Values			
6 BG-ENE	Filter: TA Programme (Yes/No)	-	4					
7 BG-ENV	Grant (EEA) per Programme	Σ	Drop field here		Drop field here			
8 BG-H 2	Grant (Norway) per Programme	2 3						
9 BG-INN	Grant per Programme	Σ Σ	Rows		Values			
10 BG-JUS	- Host Programme Area	•	Host Programme Area		Sum of Grant per Programme	Σ^{\sim}		
12 BG-TA	Incurred		Programme Short Name		Sum of Grant (EEA) per Programme	Σ^{\sim}		
13 CY-ACTI	Incurred (EEA)	$\Sigma \equiv \downarrow$	Drop field here		Sum of Grant (Norway) per Programme	Σ \sim		
Add nev	w table/chart				Cancel		Save	

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.

Data Source										
Programmes - Programmes and	funds and related financia	al aggregates								- 00
			A							
tle			-							
		- /								
-										
ote										
		-								
								E C	G .0.	
Export Grid Charts	2	3	4	5	6	7	8	Format 9	Options Fields	Fullsc
1 HOST PROGRAMME AREA 🔅	2	3	4	5	ō	1	9	а	10	
2 PROGRAMME SHORT NAME & Tota	al Sum of Grant per Programme	Total Sum of Grant (EEA) per Programme	Total Sum of Grant (Norway) per Programme	Total Sum of Disbursed						
4 ▶ GFRC	29 283 041.99									
5 F GEVE	46 233 279			18 248 397.16						
6 ► PA01	309 500 000	90 500 000	219 000 000	20 599 480.43						
7 > PA02	211 600 000	64 600 000	147 000 000	32 090 319.14						
^B * PA03	52 000 000	40 000 000	12 000 000	18 140 626.21						
9 CZ-EDUCATION	6 500 000	6 500 000		2 939 923.24						
0 PL-EDUCATION	20 000 000	20 000 000		5 050 863.11						
1 RO-EDUCATION	12 000 000	12 000 000		6 409 655.41						
	13 500 000	1 500 000	12 000 000	3 740 184.45						
2 SI-EDUCATION	6 000 000	6 000 000		2 031 381.85						
2 SI-EDUCATION 3 ▶ PA04	28 792 860									

3.4. Formatting numerical values

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

Create self-service data analysis										-
* Data Source										
Programmes - Programmes and funds and	d related financia	al aggregates								· Ø0
Title										
Note										
							1			
									念展	R.N
Export Grid Charts								Format	Dptions Fields	Fullscreen
1	2	3	4	5	6	7	8	9	10	
1 HOST PROGRAMME AREA 🌣										
2 PROGRAMME SHORT NAME C Total Sum of Gr			Total Sum of Grant (Norway) per Programme	Total Sum of Disbursed						
4 ▶ GFRC	29 283 041.99	16 178 880.72								
5	46 233 279 309 500 000									
7 ▶ PA02	211 600 000									
8 v PA03	52 000 000	40 000 000								

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)

	3		6			7
		Format cells	APPLY	CANCEL		1
er Programme	Total Sum of Grant (EEA) p	2			d	
29 283 041.99		CHOOSE VALUE	Choose value	\sim	000	
46 233 279					7.16	
309 500 000		Text align	right	\sim	0.43	
211 600 000		Text diigh	ngn	~	9.14	
52 000 000		Thousand separator	(Space)	\sim	6.21	
6 500 000					3.24	
20 000 000		Decimal separator		\checkmark	3.11	
12 000 000		3 Decimal places	None	\sim	5.41	
13 500 000		-			4.45	
6 000 000		4 Currency symbol			1.85	
28 792 860		Null value			360	
		5 Format as percent	false	\sim		
		I office as percent	10130	~		Canc

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



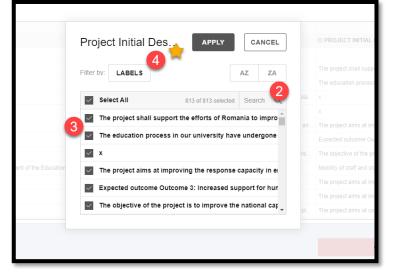
3.5. Filtering

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)

1	2	3	4	5 6	7
1 © PROGRAMME SHORT NAME	PROJECT NAME	© PROJECT CODE	# PROJECT INITIAL DESCRIPTION		
2			-		
23 RO-HEALTH	Creating a register to track left ventricular remodeling result of acute myocardial infarct	RO-HEALTH-0004	The project, implemented as a pilot project in 8 counties in the western part of Romani		
24 RO-HEALTH	Strengthening the TB control in Romania through implementation of the WHO END TB	RO-HEALTH-0005	The project shall support the Romanian TB control and surveillance system and netwo		
25 RO-HEALTH	Increase performance regarding diagnosis and treatment of cancers in children by imp	RO-HEALTH-0006	The project shall focus on the improved diagnosis and treatment of children's cancer $t \ldots$		
26 RO-HEALTH	Support for the Development of Community Mental services for children and adolescents	RO-HEALTH-0007	The project shall support raising awareness and improving capacities of community m		
27 RO-HEALTH	Strengthening the capacity to address antimicrobial resistance (AMR) and healthcare \ldots	RO-HEALTH-0008	The project shall support monitoring of Anti-Microbial Resistance (AMR) and Hospital \ldots		
28 BG-LOCALDEV	Grow through Activating Local Potential (GALOP)	BG-LOCALDEV-0001	While the larger municipalities in Bulgaria have learned to successfully use their local \ldots		
29 BG-LOCALDEV	Innovative Community Care Models in Favour of People with Chronic Diseases and P	BG-LOCALDEV-0002	The goal of the project is to establish an innovative model of distant chronic disease m_{\cdots}		
30 BG-LOCALDEV	Recovery Centre for Children with Oncoheamathological Diseases	BG-LOCALDEV-0003	In Bulgaria, about 200 children in the age between 0 and 18 have cancer. Every child \ldots		
31 BG-LOCALDEV	Novel Approaches to Generating Data on Hard-to-reach Populations at Risk of Violatio	BG-LOCALDEV-0006	The demand for data disaggregated by various vulnerability criteria (ethnicity, gender, \ldots		
32 RO-LOCALDEV	Sustainable social and education integration through sport activities	RO-LOCALDEV-0001	According to Eurostat reports, at the end of 2015, Romania has one of the highest pe		
33 RO-LOCALDEV	Improving access and quality of services to citizens - transparent, responsible and ac	RO-LOCALDEV-0003	Law enforcement and translating policy into practice remains a challenge in Romania. \ldots		

- A pop-up window appears, where you can either
 - search for specific words (2),
 - manually select the descriptions you want to include (3),
 - o 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).

Liechtenstein	Norway
Norway grants	grants

PROJEC	T NAME 🌼 PRO	DJECT INITIAL	DESCRIPTIC
or clean a nergy Aud ustainable nergy Aud		CANCEL	ng civic in ication is energy a
lergy Aud	Contain ^ air quality		dit for 3 p
-	Equal	ar label filter	
	Not equal		
	Begin		
	Not begin		
	End		- 4
	Not end		
	Contain 🗸		- 1
	Not contain		
	8	Format Option	is Fields
	4	5	6
\$	PROJECT INITIAL DESCRIPTION		
т	he project aims at boosting civic involvement, stimulating initiative and volunteering, \ldots		
uilding T	he propose with this application is to receive support in undertaking an energy audit f		
gs S	upport in undertaking an energy audit for 2 public buildings belonging to Târnăveni M		



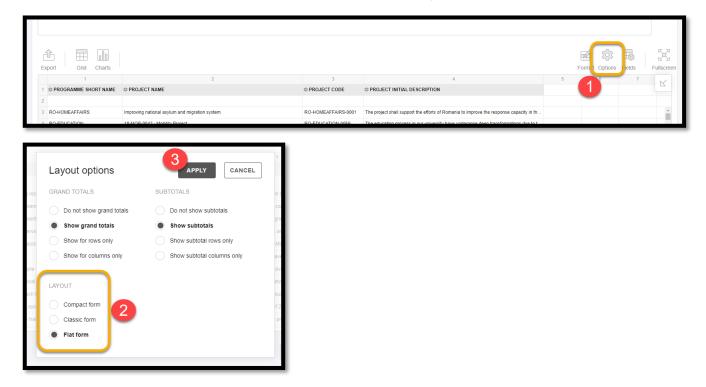
3.6. Grid layout options

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.

		4		-
Q	Report Filters		Columns	
	Programme Area Code	=	∑ Values	
	Filter: Predefined Project (Yes/No)	=		
	Project Sector	=	Dron field here	
			Dioprice noic	
	Rows		Values	
	Country	=	Sum of Project Grant	$\Sigma^{\vee} \equiv$
=	Programme Short Name			
	Project Name			
	 ■ 3 ■ 3 ■ 4 ■ 5 ■ 5 ■ 6 ■ 7 ■ 7	Programme Area Code Filter: Predefined Project (Yes/No) Project Sector Rows Country Programme Short Name	Report Filters Programme Area Code Filter: Predefined Project (Yes/No) Project Sector Rows Country Programme Short Name	Report Filters Columns ∑ = Frogramme Area Code = Filter: Predefined Project (Yes/No) = Project Sector = Rows Drop field here Country = Programme Short Name =

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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 \sum 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 %

Export	Grid Charts				•	Format Op	tion Fields
1 PROGRAI 2 PROJEC	Fields Drag and drop fields to arrange				Add calculated value		
3 PROJ	All Fields	Q	Report Filters		Columns		
	Project Grant Rate	*	Programme Area Code		∑ Values		=
	Project Initial Description		Filter: Predefined Project (Yes/No)			Sum 🗸 🔺	
			Project Sector		Drop f	Count	
	Project Location					Distinct Count	
	Project Name		Rows		Values	Average	
	Project Outcome(s)		Country	=	Sum of Project Grant	Median	Σ~
	Project Results Description		Programme Short Name	=		Product	-0
	Project Sector		Project Name	=			4
		•	-	•	Drop f	Min	
						Max	

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.

Data Source							
Programmes - Programmes and funds a	and related financial aggregate	s					• 🔗
ïtle							
How many programmes do we have in	implementation at the momen	π.					
lote							
			(2)			Data source: Programmer	5
Below you can see the number of programme	es per Programme status . Click on	a status to see the progr	ammes in question.				
This table excludes							
Bilateral Funds							
 Technical assistance Country level Social Dialogue - Decen 	tt Work programmes (instead it cou	nts Social Dialogue - D	ecent Work as one n	rogramme 'SDT) W'')		
- county to to count prairing at a poort	a	an and an and an and an and and and and	in the second				
							Я
Export Grid Charts							
						Format Options Fields	Fullso
FILTER: BF PROGRAMME (YES/NO) TO FILTER	t: TA PROGRAMME (YES/NO) 🕆 🕸 HO	ST PROGRAMME AREA 🌣					
1	2	3 4	5	6	7	8 9 1	0
1 PROGRAMME STATUS							
2 PROGRAMME SHORT NAME 🔻 🌣 Total Sun							
3 Programme implementation	€ 2 050 245 380.99 € 120 000 000	89					
4 ► Programme agreement preparation 5 ► MoU signed	€ 24 500 000	2					
6 Programme approved	€ 17 500 000	2					
7 Grand Total	€ 2 212 245 380.99	97					
8							
						3	
Add new table/chart					Cano	el Save	
							_
		C	arch for orograf				
lame	Category						
		MO					
lame xample analysis: Programmes per stat		MO					
xample analysis: Programmes per stat scription		МО					
xample analysis: Programmes per stat		MO					
xample analysis: Programmes per stat scription		MO					
xample analysis: Programmes per stal scription his analysis shows		мо					
xample analysis: Programmes per stat scription		мо	ľ				
xample analysis: Programmes per stal scription his analysis shows		мо					
xample analysis: Programmes per stal scription his analysis shows		MO					
xample analysis: Programmes per stal scription his analysis shows		MO					

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.

	Self-service data analysis View Example analysis: Programmes	Norway grants grants									
ප	Example analysis: Programmes	Edit									
	This analysis presents example summaries of data stored in GrACE. The information is updated whenever this report is opened (maximum Katariina Pentti lag is 15 minutes).										
O	If you have questions on how to use self-service, please see user manual: (url coming)										
1 1	Modify analysis Delete Clone Share										
A											
	Self-service data anaysis										
Ð	How many programmes do we have in implementation at the moment? Data source: Programmes										
<u>lan</u>	Below you can see the number of programmes per Programme status . Click on a status to see the programmes in question.										
Ö	This table excludes Bilisteral Funds										
1 2	Technical assistance Country level Social Dialogue - Decent Work programmes (instead, it counts Social Dialogue - Decent Work as one programme, 'SDDW)										
•		K N K N									
0	Export Grid Charls	Fullscreen									
	FILTER: BF PROGRAMME (YESNO) 7 th FILTER: TA PROGRAMME (YESNO) 7 th HOST PROGRAMME AREA th Al										
	1 2 3 4 5 6 7 8	9 10									
	2 PROGRAMME SHORT NAME ▼ Total Sum of Grant per Programme Number of programmes ↓										
	3 ▶ Programme implementation € 2 050 245 380.99 89										
	4 ▶ Programme agreement preparation € 120 000 000 4										
	5 ► MoU signed € 24 500 000 2										

14-202	.1				Faaro	- Car araar	
ta ana	Share	self-service data analysis					nines a
is: Pro	Select	sharing role/ group					
esents	0	Role Level	Role				naximu
s).	0	Roles	FMO All Users				
stions	* Role Selec	t 2 .		Cancel	3	ave	nalysis
a anay:	Indivi	duals			ОК	Cancel	men
the nu	mber of	programmes per Programme status . Click	on a status to see t	the programm	nes in quest	ion.	

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.

		How many program	mmes do we l	have in ir	nplemen	tation at i	the mom	ent?		
									Data source:	Programm
Below you can see	the number of	f programmes per Programm	ne status. Click on a s	tatus to see	the programm	nes in questio	n.			
This table excludes										
Bilateral Funds										
• Te sistal		t Work programmes (instead, it counts	s Social Dialogue - Decent V	Vork as one proer	amme. 'SDDW')					
n m										5
Export Grid	Charts									Fullso
Print	: (YES/NO) ¥ 🛱	FILTER: TA PROGRAMME (YES/NO false	All	ME AREA 🐺						
To HTML		2	3	4	5	6	7	8	9	10
To CSV	; 🗘									
	3 ¢ (TNAME ▼¢	Total Sum of Grant per Programme	Number of programmes 👃							
To Excel	3 ¢ IT NAME ▼ ¢ itation	Total Sum of Grant per Programme € 2 050 245 380.99	Number of programmes \$							
To Excel			89							
To Excel	itation	€ 2 050 245 380.99	89							
To Excel	itation nt preparation	€ 2 050 245 380.99 € 120 000 000	89 4 2							

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.

GRACE	FUNDING PERIOD 2014-2021 Search for programmes and countries Q (?)
ද 	Example analysis: Programmes & Projects Edit C ^ This analysis is shared with all GrACE users and presents example summaries of data stored in GrACE. The information is Katarina Pentti
•	updated whenever this report is opened (maximum lag is 15 minutes).
<u>ش</u>	
	Self-service data anaysis
	How many projects have been signed to date?
۵	The table below presents a summary of contracted projects (where Project Level Information has been submitted to FMO) and their grants. This excludes any terminated projects.

3.10. Advanced: join data sources

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

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

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

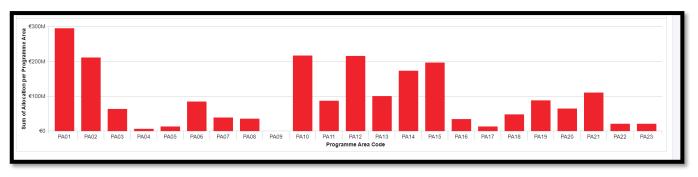
- Click Fields (4) to configure the rows and the columns for the report.
- Expand (5) the fields of the DataMart tables to select the needed ones for the report.
- When your selection is ready, press Apply (6)

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

Norway

id CHH tenstein aygrants					Norway grants
GRACE	FUNDING PERIOD 2014-2021 Self-service data analysis Create self-service data analysis	lysis	Sear	ch for programme	s and countries Q looland DL Liochtenstein Norway grants
2	Projects and target groups				
	* Data Source				1
0	Project target groups - This set contains a list of all target gro				
	Projects - Project level information and related financial aggr	regates 2	v	Project target g	groups.Project Code
Ê	Title				
A	Projects and target groups				
	Note				
ß					
					4
Lat					
•	Export Grid Charts		6	12	Format Options Fields Fulls
<u>1</u>	1 COUNT Fields		Add calculated value 📰 APPLY	CANCEL	
	2 (blank) Drag and drop fields to arrange 3 Bulg 5 All Fields Expand All Q	Report Filters	Columns		
·	4 Cro. 8 Cyonus • Project target groups		Σ Values		
0	© Czech Country =				
	7 Estona Programme Short Name 8 Greece Project Code	Drop field here	Drop field here		
	9 Latvia	Rows	Values		
	10 Lithuan Target Group (intermediary)	Target Group (end beneficiary)	Sum of Project Grant	$\Sigma^{\vee} \equiv$	
	12 Poland Projects	Country			
	13 Portuge	Drop field here	Drop field here		*

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).

* Data Source		
Programme areas - Programme areas and related finance	ial aggregates	_ 0
Priority sectors	Priority sectors and related financial aggregates	•
Programme areas	Programme areas and related financial aggregates	
Achievement progress	This set contains results frameworks and achievements in time per programme (also core/common indicators available)	
Results per disaggregation	This set contains achievements for those indicators, which have a disaggregation, per programme and disaggregation category	
Payments	All payments in time (including payments to DPP, IPO, DS travel costs etc)	
Programme payments and budget headings	Programme funding per outcome (or other budget heading) to date	_

- 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"

Programme areas - Programme areas and related finar	icial aggregates			- 00
tle				
ote				
Export Grid Charts	2		Format	Options Fields Fullscr
1	2	3	4	5
PRIORITY SECTOR NAME	CODE ROGRAMME AREA CODE	© PROGRAMME AREA NAME	ALLOCATION (EEA) PER PROGRAMME AREA	
2	-		1 322 031 270.5200002	
Culture, civil society, good governance, fundamental rights and freedoms	PA14	Cultural Entrepreneurship, Cultural Heritage and Cultural Cooperation	176 696 500	
Culture, civil society, good governance, fundamental rights and freedoms	PA15	Civil Society	198 008 500	
Culture, civil society, good governance, fundamental rights and freedoms	PA16	Good Governance, Accountable Institutions, Transparency	24 282 500	
Culture, civil society, good governance, fundamental rights and freedoms	PA17	Human Rights – National Implementation	4 988 250	
Environment, energy, climate change and low carbon economy	PA11	Environment and Ecosystems	50 982 550	
Environment, energy, climate change and low carbon economy	PA12	Renewable Energy, Energy Efficiency, Energy Security	182 003 399	
Environment, energy, climate change and low carbon economy	PA13	Climate Change Mitigation and Adaptation	73 407 051	
0 Fund for regional cooperation	GFRC 0	Fund for regional cooperation across the priority sectors	16 178 880.72	
1 Fund for regional cooperation	GFYE	Fund for promotion of sustainable and quality youth employment	25 543 886.64	
2 Innovation, research, education and competitiveness	PA01	Business Development, Innovation and SMEs	78 275 000	
3 Innovation research education and competitiveness	P402	Pesesrch	R0 833 584	
1				•
Add new table/chart			Cancel	Save

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Norway

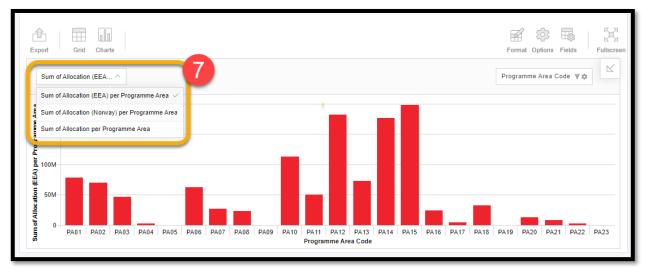
- Choose how to present your data – for example you can deselect the fields *Priority Sector Name* and *Programme Area Name* (4). You can also grab and drag the fields to rearrange them as you like. When you're done, hit apply (5)

RAMME AREA 🔅 A	Fields E APPLY CANCEL	MME AREA	
031 270.5200002	Select and arrange columns	376 316 534.15	
16 178 880.72	Select All	29 283 041.99	
25 543 886.64		46 233 279	
28 184 002	Programme Area Code	50 688 670	
38 052 240	\checkmark Allocation per Programme Area $~~\Sigma^{\vee}\equiv~$	80 403 241	
1 572 061	Allocation (EEA) per Programme Area $\Sigma^{\vee} \equiv$	2 086 062	
17 548 499.97	Allocation (Norway) per Programme Area $\Sigma^{\vee} \equiv$	32 560 500	
78 275 000		295 175 000	
69 832 564 4	Priority Sector Name	211 358 081	
46 992 438	Programme Area Name	63 537 869	
3 365 000		6 595 000	
		13 343 040	

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

	ort Grid	Charts			Format	Options	Fields	Fulls
	1	Column 6	2	3	4	5		6
1	PROGRAMME AR	Bar	N PER PROGRAMME AREA	ALLOCATION (EEA) PER PROGRAMME AREA	ALLOCATION (NORWAY) PER PROGRAMME AREA			Ľ
2			2 376 316 534.15	1 322 031 270.5200002	1 054 285 263.63			
3	PA01	/ Line	295 175 000	78 275 000	216 900 000			
4	PA02	,°°' Scatter	211 358 081	69 832 564	141 525 517			
5	PA03	Die Pie	63 537 869	46 992 436	16 545 433			
в	PA04		6 595 000	3 365 000	3 230 000			
7	PA05	stacked column	13 343 040		13 343 040			
в	PA06	Column line	85 012 650.09	63 116 326.09	21 896 324			
9	PA07	🦼 Geo Map	39 508 225	27 650 000	11 858 225			
0	PA08	Multiple values	36 194 181	24 012 000	12 182 181			
1	PA09	wumple values	0	0	0			
2	PA10		212 764 344	112 988 732	99 775 612			
2	PA11		86 714 771	50 982 550	35 732 221			

- 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).



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	х			
City	х		x	
Country	х		x	
District	х		x	
District code	х		x	
Email address	х			
Fax	х			
Filter: Active organisation (Yes/No)	х			
Organisation	х	x	x	When used as a value (count or distinct count) you get the number of organisations in your selection
Organisation classification	х		x	
Organisation classification sector	х		x	
Organisation local name	х		x	
Organisation type	Х		х	
Phone	Х			
Postal code	Х		х	
Website	Х			

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	х		х	
Filter: Project organisation (Yes/No)			х	
Funding Period	х		х	
Organisation	x		х	
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		х	

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Norway

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		х	
Filter: Latest forecast (Yes/No)		x		
Forecast document name	x	x	х	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		х		
Forecasted year	x		x	
Programme short name	x		x	
Forecast status	x		x	
Document submission month	x		x	
Document submission year	x		х	

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	х		x	
BTO reference	х		x	
Country	х		x	
IFR submission deadline	х			
Disbursed		x		
Disbursed (EEA)		x		
Disbursed (Norway)		x		
Financial report reference	x	x	х	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)	х			
Incurred end date		x		
Incurred start date	х			
Interest earned		x		
Interest earned EEA		x		
Interest earned Norway		x		
Organisation (non-programme related payments)	x		x	
Payment date	x			
Processing status	х		x	

Programme short name	х		х	
Proposed expenditures end date	х			
Proposed expenditures start date	х			
Requested		х		
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	Х		x	
Payment date	x			
Payment reference	x			
Payment status	x		x	
Programme area code	x		x	
Programme short name	x		Х	
Priority sector code	x		Х	
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		х	
Budget heading title	х		x	
Co-financing		x		
Country	x		x	
Disbursed		х		
Eligible expenditure		х		
Financial Mechanism	x		x	
Grant		x		
Incurred		x		
Outcome		x		

Iceland [Ъ.
Liechtens	stein
Norway g	rants



Programme area code	Х		Х	
Programme short name	x		х	
Priority sector code	х		х	
Reported incurred		х		
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	х		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

Can be used in rows / columns	Can be used as a value	Can be used as a filter	Note
x		x	
x	x	x	When used as a value (count or distinct count) you get the number of countries in your selection
Х		х	
	x		
X		x	
	x		
	x x x x x	used in rows / columnsCan be used as a valueXXXXXXXXXXXXXXXXXXXXXXXXXX	used in rows / columnsCan be used as a valueCan be used as a filterXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

Self-service data analysis

Public

Iceland Liechtenstein Norway grants

Gross Allocation (Norway)		х		
Gross Allocation	х			
Legal officer	х		x	
MOU Signature Date (EEA)	х			
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		х	
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		х	
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		х		
Allocation per programme area		х		
Objective	х		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	х		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	х		x	
Funding period	x		х	
Grant name	x		х	
Grant short name	x		х	
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	х	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	х			
BI grant		x		
BI implementation end date	x			
BI implementation start date	х			
BI initial description	х			
BI name	x		x	
BI partners	x		x	
BI results description	x			
BI status	x		x	
BIURL	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)			х	

Filter: BI type study tour (Yes/No)		х	
initial submission date	x		
Last review date	x		
Last update date	х		
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	intoi	
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		Х		
Bilateral call level (Country/Programme)	x		х	
Call amount		x		
Call created date	x			
Call number	x		х	
Call publication date	x			
Call status	x		х	
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		х	
Call URL	x			
Country	x		х	
Decision date	x			
Filter: Bilateral call (Yes/No)			х	
Filter: Call published on eeagrants.org (Yes/No)			x	
Filter: Relaunched call (Yes/No)			х	
Filter: Rolling call (Yes/No)			х	
Financial Mechanism	x		х	
Grant applied for in calls		х		
Grant awarded in calls		х		
Initial call submission date	x			
Call last updated date	x			
Projects contracted		х		

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Iceland DL Liechtenstein Norway grants				Norway grants
Projects contracted from the reserve list		х		
Programme short name	x		х	
Related outcome(s)	x		х	

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	х		х	
Communication officer	х		x	
Country	х		x	
Disbursed		x		
Disbursed (EEA)		x		
Disbursed (Norway)		x		
Donor Programme Partner (DPP)	х		x	
Eligibility start date	х		x	
Eligibility end date	х		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	х	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	х		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	х		х	
Programme name	Х		х	
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	Х		х	
Programme summary	х		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)	х		х	

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	х		х	
Country	х		х	
Filter: Best practice project (Yes/No)			х	
Filter: dpp project (Yes/No)			х	
Filter: Project marked for review (Yes/No)			х	
Filter: Predefined project (Yes/No)			х	
Filter: Project published (Yes/No)			х	
Filter: Project reviewed (Yes/No)			х	
Filter: Cooperation will continue (Yes/No)			х	
Financial Mechanism	x		х	
Implementation modality	x		х	
Policy marker filter: Antidiscrimination			х	
Policy marker filter: Gender equality			х	
Policy marker filter: Roma			х	
Policy marker filter: Transparency			х	
Policy marker filter: Vulnerable Groups			х	
Priority sector codes	x		х	
Programme area codes	x		х	
Programme short name	x		х	
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	х		x	

Norway grants				grants
Project education type	х		x	
Project eligibility date	х		x	
Project eligible expenditure		х		
Project grant rate	х	х	x	
Project grant		х		
Project grant incurred in the IFRs		х		
Project initial description	х			
Location	x		x	
Location NUTS 0	х		x	
Location NUTS 1	х		x	
Location NUTS 2	х		x	
Location NUTS 3	х		x	
Project name	х		x	
Project activities completed date	х		x	
Project outcome(s)	х		x	
Project results description	х			
Project sector	х		x	
Project sector detailed	х		x	
Project signature sate	X			
Status	X		Х	
URL	x			

5.4.6. Data source: Risk Assessment

Iceland RL Liechtenstein

Field name	Can be used in rows / columns	Can be used as a value	Can be used as a filter	Note
Completion date	х		х	
Country	x		х	
Filter: Risk applicable (Yes/No)			х	
Programme short name	x		х	
Actual response to risk	x			
Type of risk assessment	x			
Risk consequence		х		
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		х		
Planned response to risk	x			
Risk related to	x		х	
Risk report	х			
Risk response type	x		х	
Risk score		х		
Type of risk	x		х	
Year of risk report	x		х	

Norway

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

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
Achievement numerator				calculated field
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	

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Output	Х		х	
Programme area code	х		x	
Programme area name	х		x	
Programme short name	х		x	
Target		x		Numerical field
Target (text)	х			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		×		These can be used together through a
Achievement numerator		X		calculated field
Core/common indicator name	х		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	х		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	х		Х	
Programme area code	х		Х	
Programme area name	x		x	
Programme short name	x		x	