Manage contacts

GrACE User Manual for external users

Version 1, July 2025

EEA and Norway Grants
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Grants Management Systems Unit
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1. Introduction

GrACE is short for Grants Administration and Collaboration Environment. The system is used for the management of the EEA and Norwegian Financial Mechanisms 2021-2028 and is used by Donor and Beneficiary State entities and the Financial Mechanism Office (FMO). The screenshots you see in this document is showing GrACE as blue, as this is the theme colour for the old mechanism (2014-2021) however the process is the same for the new, “green” themed mechanism so the instructions are the same.

This manual serves as a guidance for users on how to manage the contacts in GrACE. More specifically

- how to request new user accounts for persons within their organisation
- how to deactivate contacts which do not work in their organisation anymore
- where to find the contacts from their organisation which have a GrACE account

For further help and support, please contact grace.support@efta.int. This user manual and other manuals can be found at our website https://eeagrants.org/gracemanuals, be sure to check in sometimes for updated versions.

2. Managing contacts in GrACE

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

✔

- Create contacts for your organisation in GrACE
- Request user accounts for these contacts
- Edit the existing contacts in your organisation in GrACE
- Deactivate users from your organisation in GrACE
- Manage the Role access for you and your colleagues

✘

- Create/edit/deactivate users for other organisations (besides yours)
- Change organisation details (name, location etc)

⇨ Contact GrACE support if these are needed

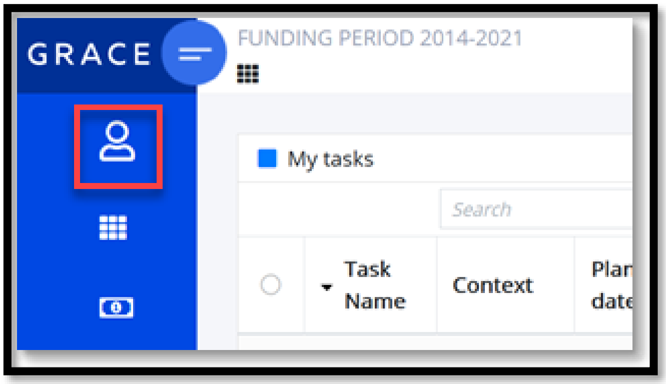
3. Creating new contacts

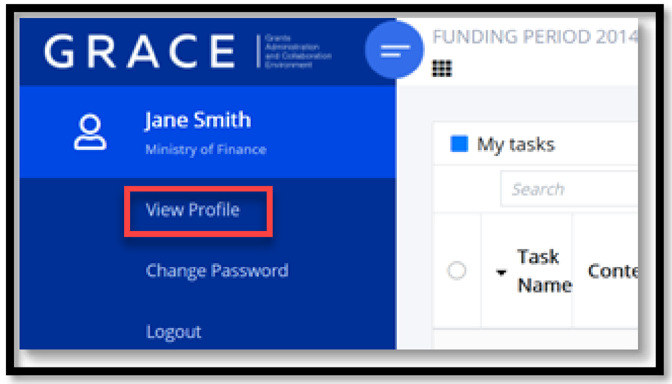
In GrACE, there are two types of accounts:

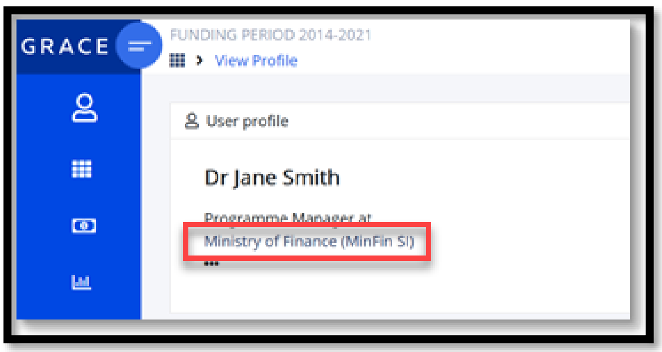
1) **Contact**: This is a basic type of account and can be used for simply administration purposes if needed. This creates a profile for a person with name and contact details. Registering as a contact is the first step in making an active user which can login, but it can also be the only step needed if you would simply like to have the contact details stored in GrACE for administrative purposes like an address book.

2) **User**: This is making the previously mentioned contact into an active user in GrACE who can login to the system to perform tasks. The contact will be sent to FMO for approval before being able to login.

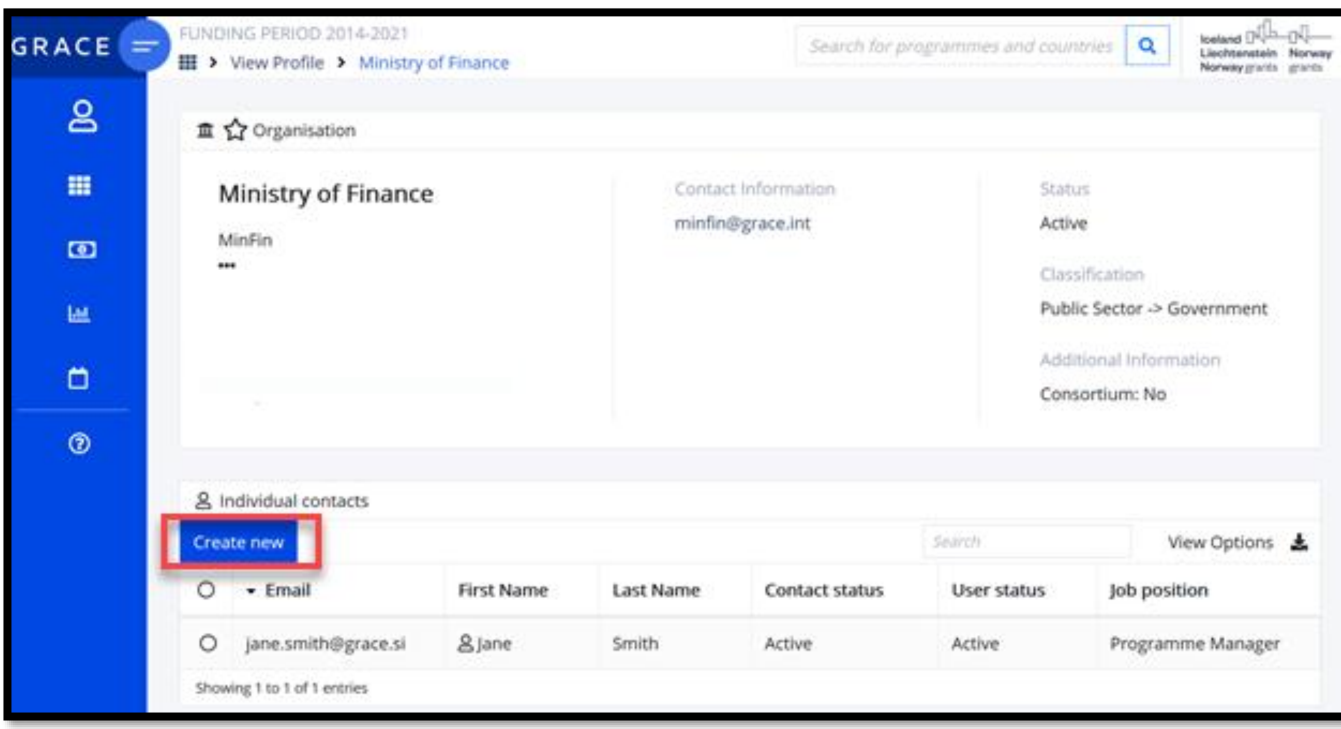
GrACE users can create new contacts and users within their organisations (e.g., within the same Programme Operator). This is done through the organisation page, which is accessed from the user profile.



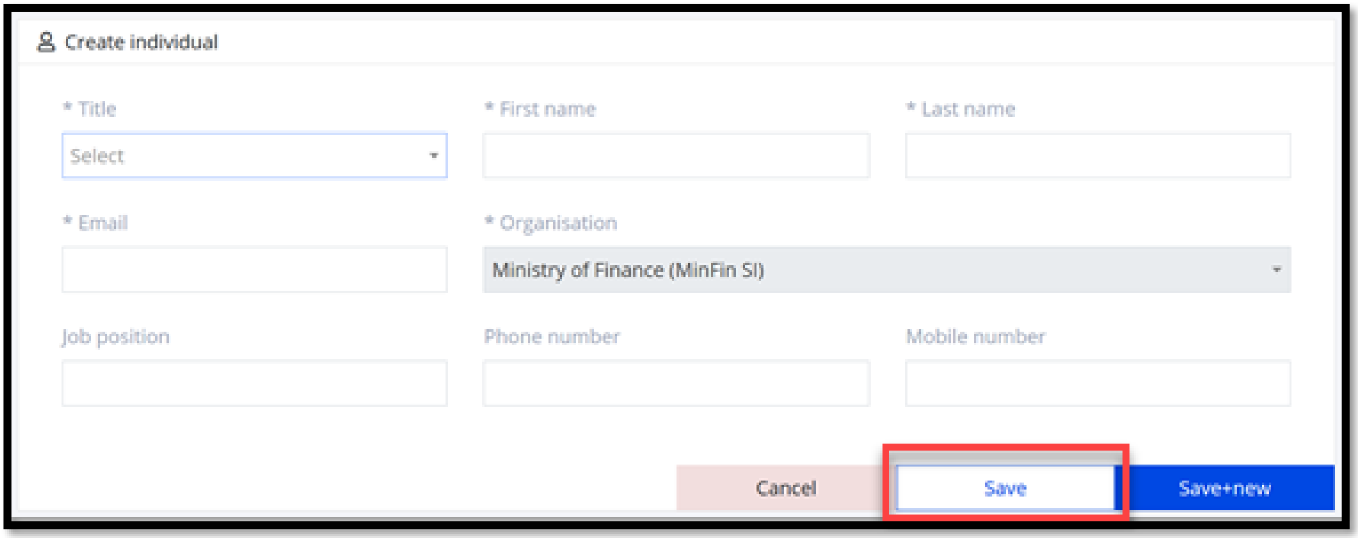




A new contact is created by selecting **Create new**.



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



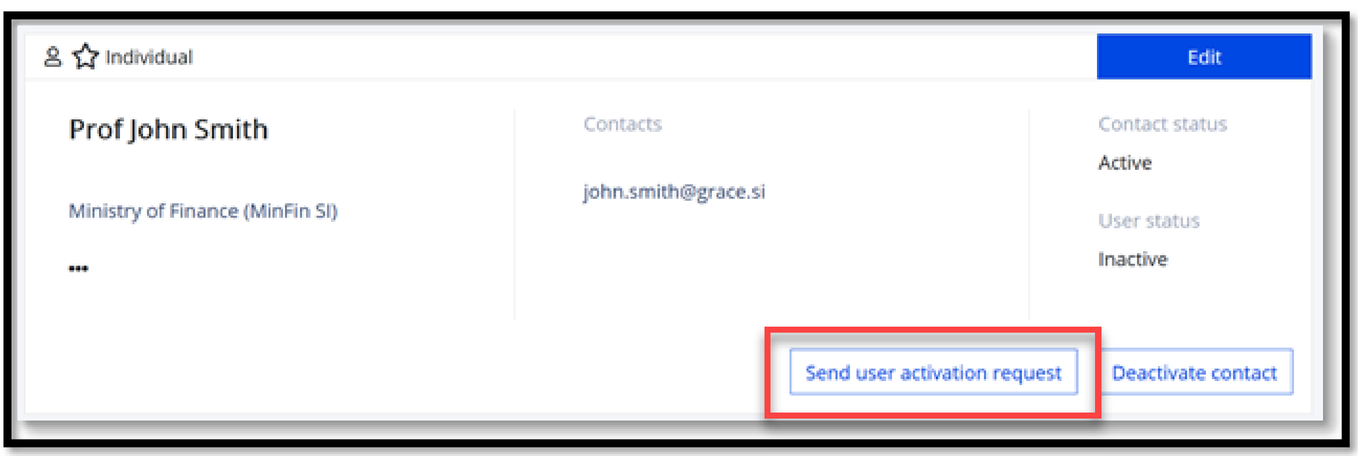
By selecting **Save** the contact is created. By selecting **Save+new** the contact is created, and a new blank form appears allowing the user to create more contacts at once.

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

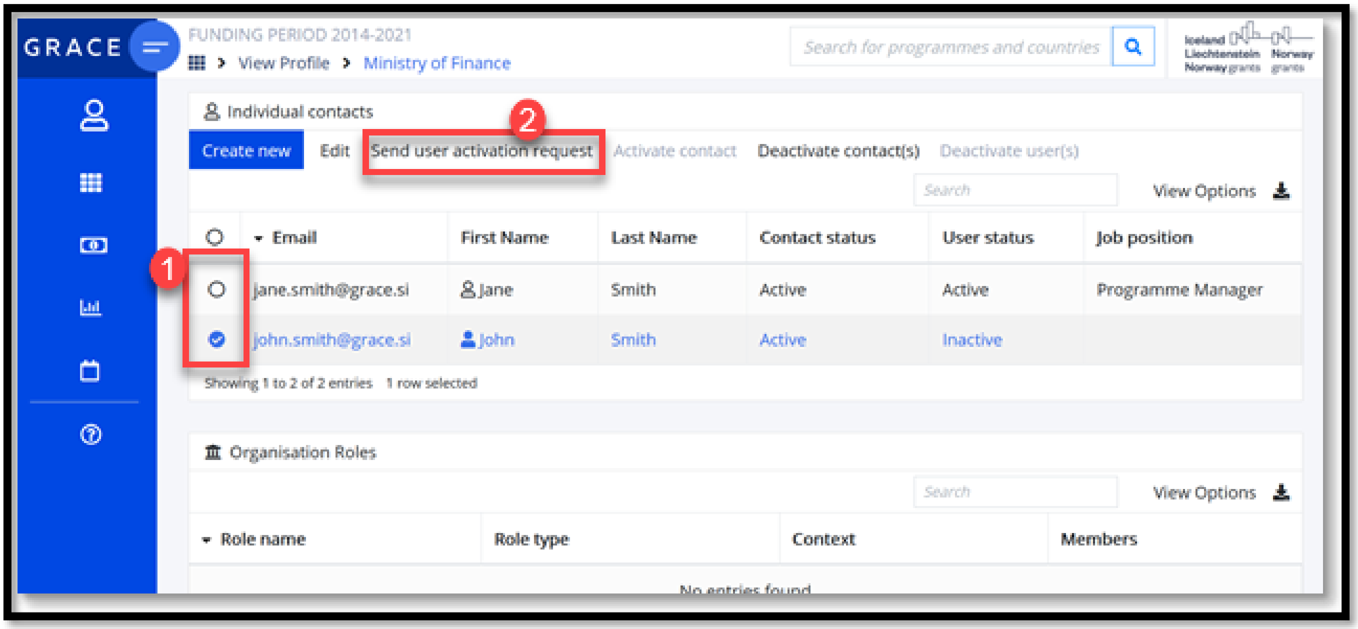
4. Requesting user activation

Following the creation of contacts, a user activation request must be sent to the FMO, before the contact will be able to login as a GrACE user. It is normally accepted by the FMO within a day or so.

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



You can also send for multiple contacts at once:



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

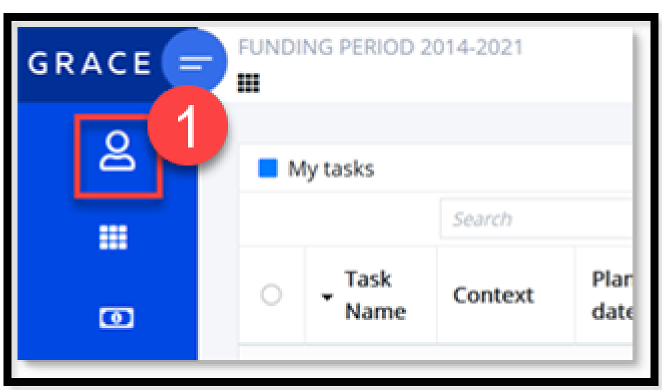
The activation is usually done the same day by GrACE support. Be sure to let your colleagues know about the Introduction to GrACE user manual, the basic user manual telling you how to best use GrACE in general – it can be found in a link in the email they receive to activate their account, but it can also be found together with all our other user manuals at https://eeagrants.org/gracemanuals or from the ? Help Sections inside of GrACE.

5. Managing organisation roles

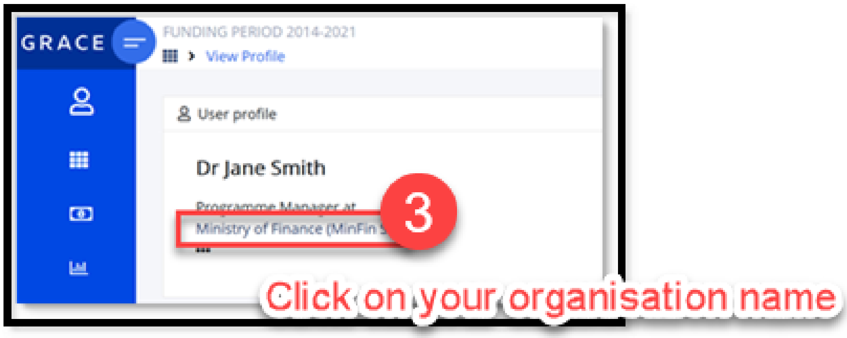
You can decide which organisation roles your colleagues should have access to if your organisation has many roles.

5.1. Giving access rights

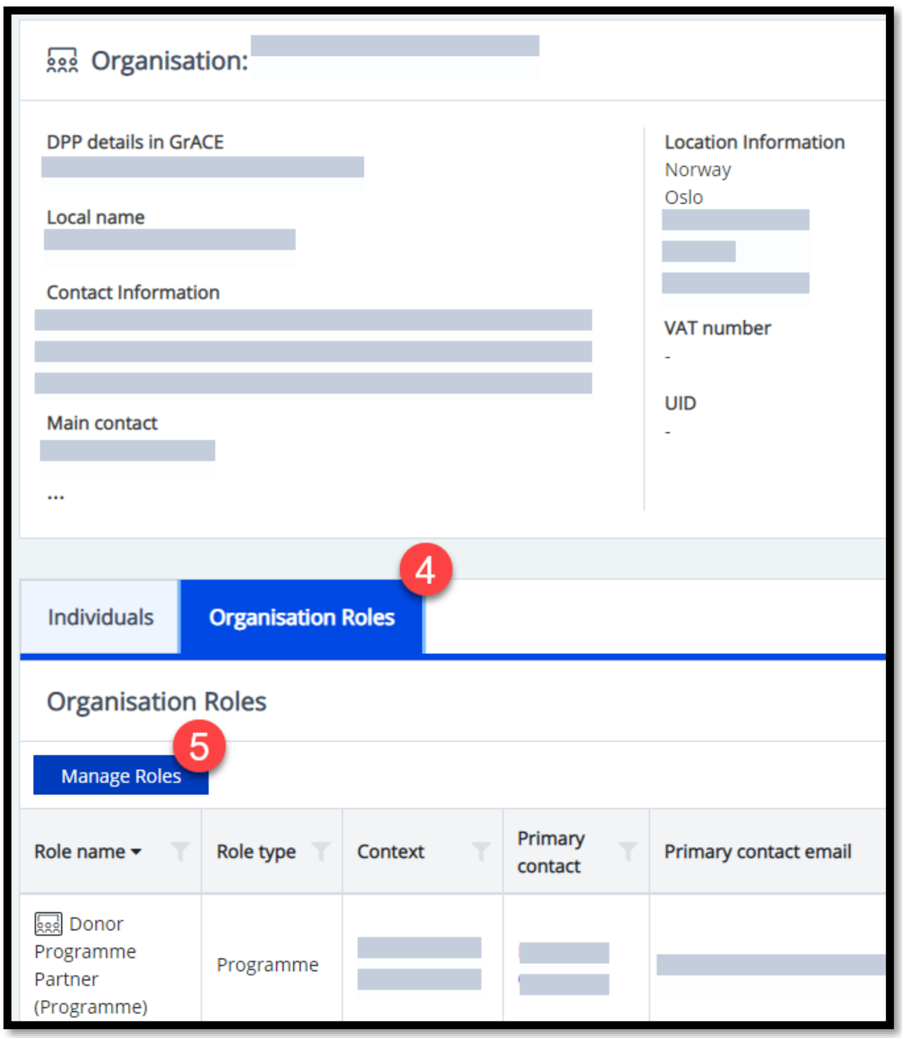
1) Select the user icon in the menu
2) Select “View Profile”



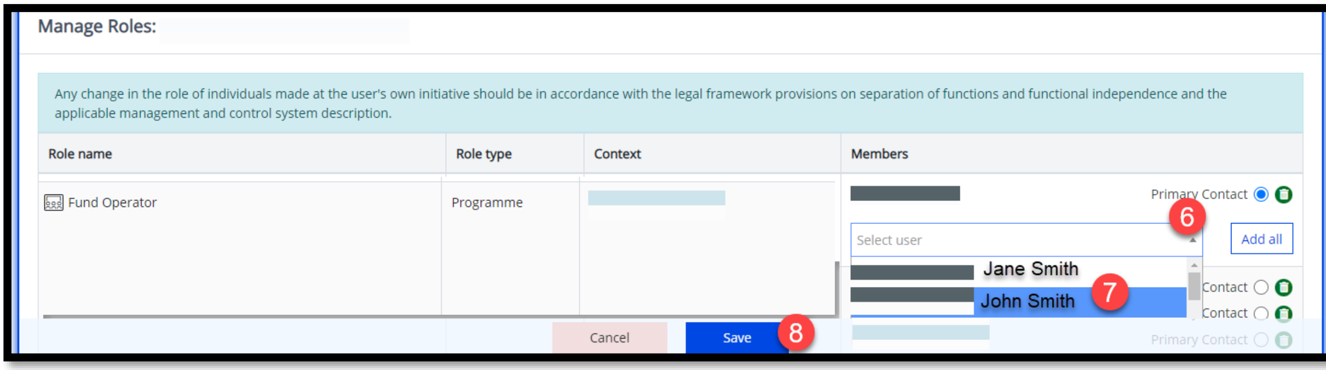
3) Click on your organisation name



4) Click on “Organisation Roles”
5) Click on “Manage Roles”



6) Click on the drop-down list for the Role name you would like to add colleagues to
7) Select the colleague you would like to add
8) Click on “Save”.



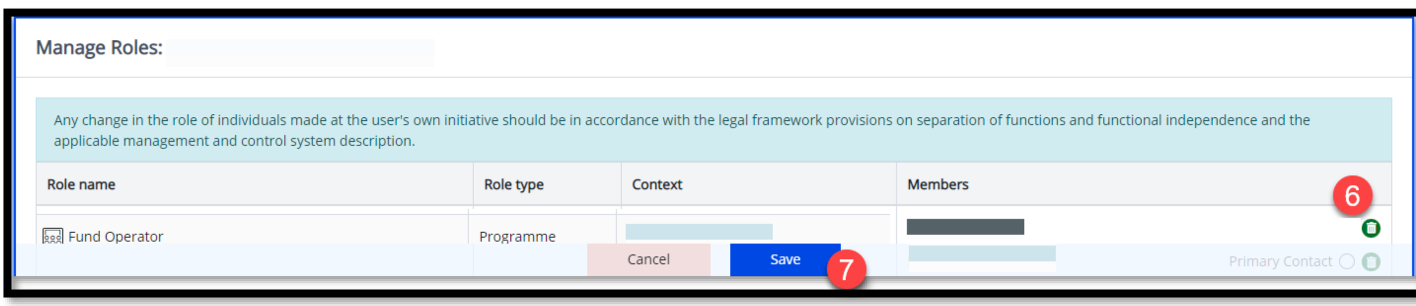
5.2. Removing access rights

If you would like to remove a user's access rights, please follow steps 1-5 above, then:

6) Next to the Role name you would like to remove the access from, click on the green rubbish bin symbol next to the user's name.

7) Click "Save"

The user no longer have access rights to the role you removed them from.



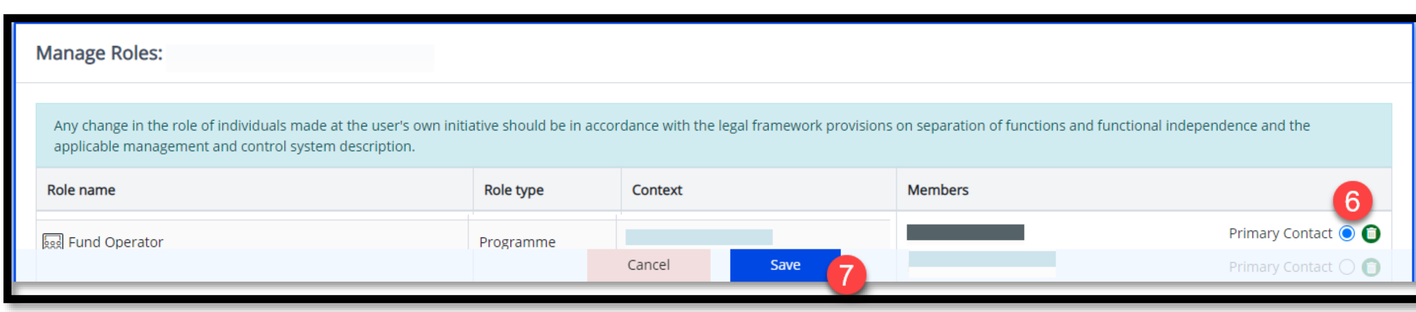
5.3. Setting a new Primary Contact for a Role

The Primary Contact for a Role is the user who will get the task assigned to them and receive an email / notification that they have a task waiting for them in GrACE. The other colleagues in the same Role will be able to see this task in GrACE and can take over the task if necessary, from their dashboard, as explained in the beginning of the user manuals for the various tasks.

To set a new primary contact for a specific role, please follow steps 1-5 above, then:

6) Next to the Role name, click on the circle next to the user's name so that the blue dot appear next to the user name.

7) Click "Save"

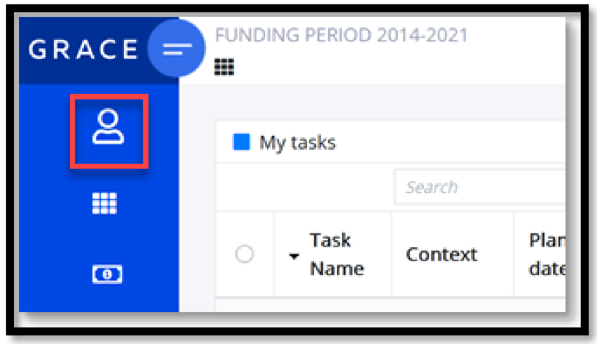


6. Edit existing contacts from your organisation

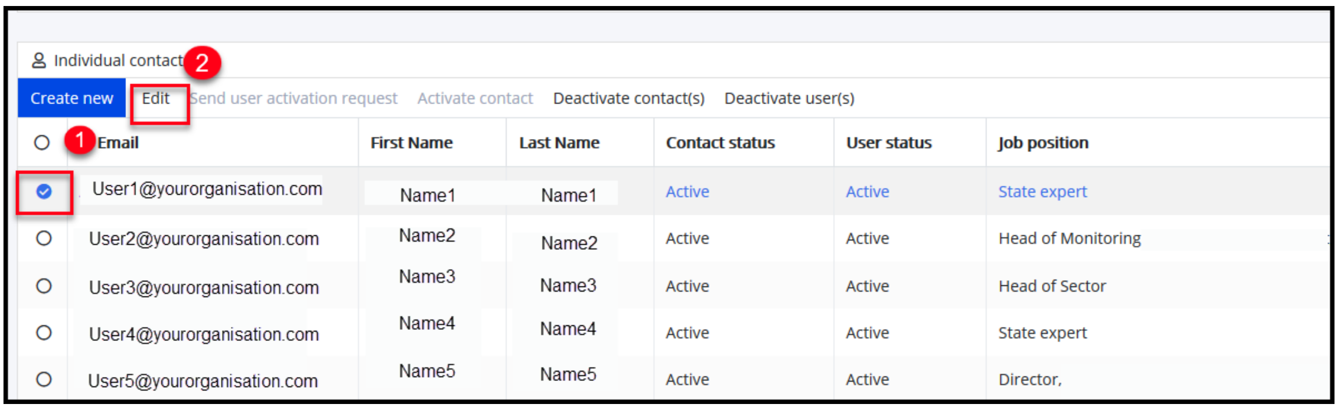
You can edit at any point the information for your user profile or for other users from your organisation in GrACE to keep the contact details up to date.

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

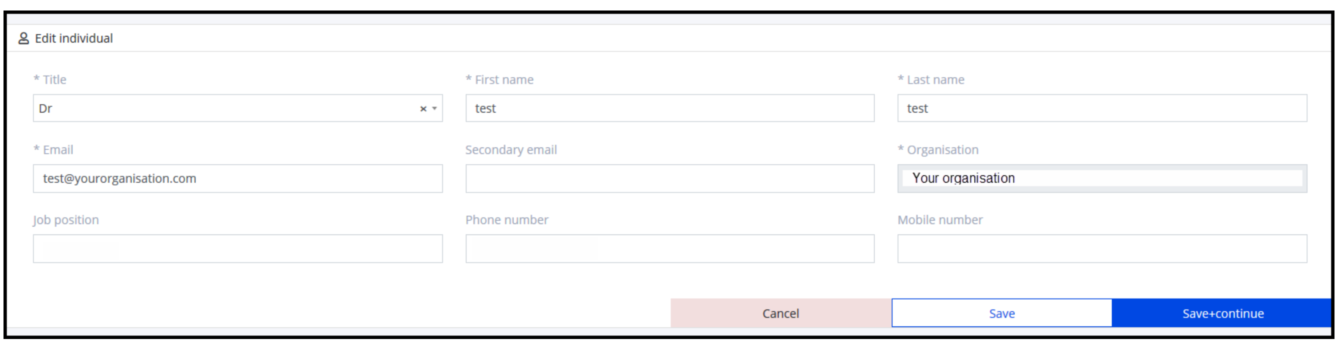
You can always edit your profile by accessing your profile then click **Edit**.



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



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



After editing the contact details, you can click on

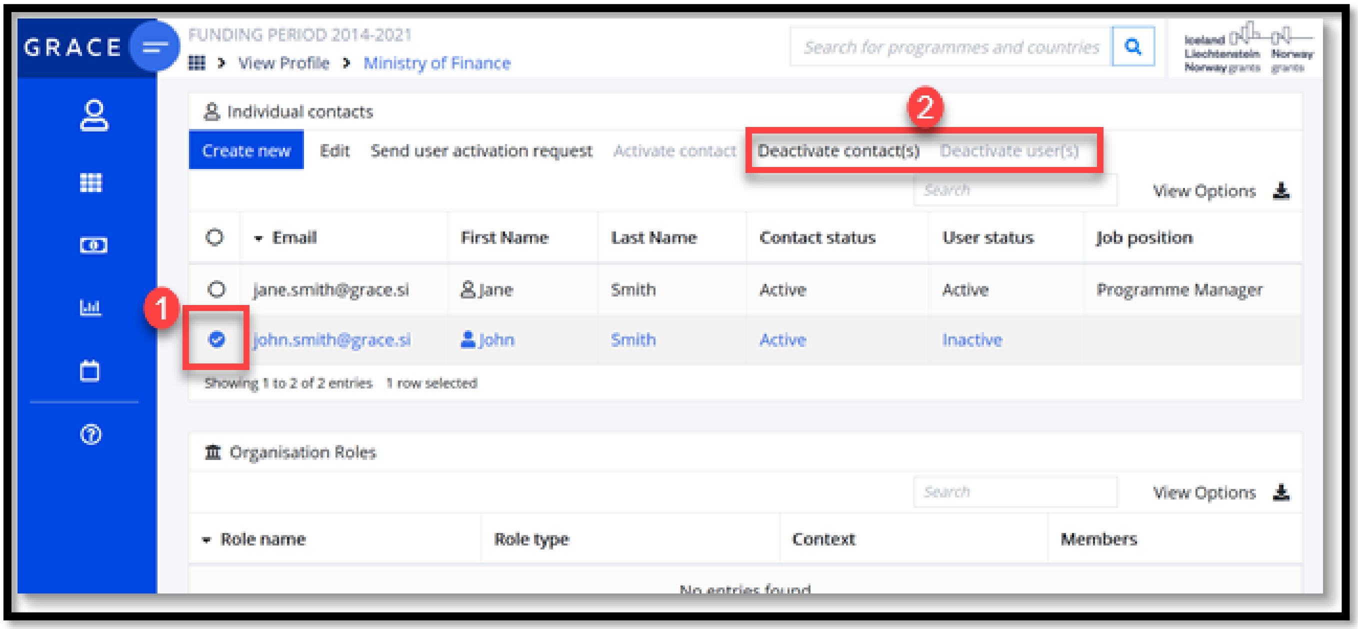
- **Save:** this will save the information and go out from edit mode
- **Save+continue:** this will save the information and allow you to continue editing the information for the contact

7. Deactivate contacts

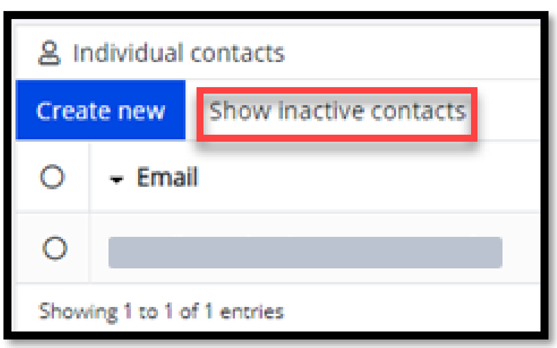
If someone no longer should have access to your organisation, you can deactivate this person. In chapter 3 we explained the two types of accounts available in GrACE, namely **Contact** and **User**. Please refer to that chapter for further explanations of the two.

To deactivate, there are two options:

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



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



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

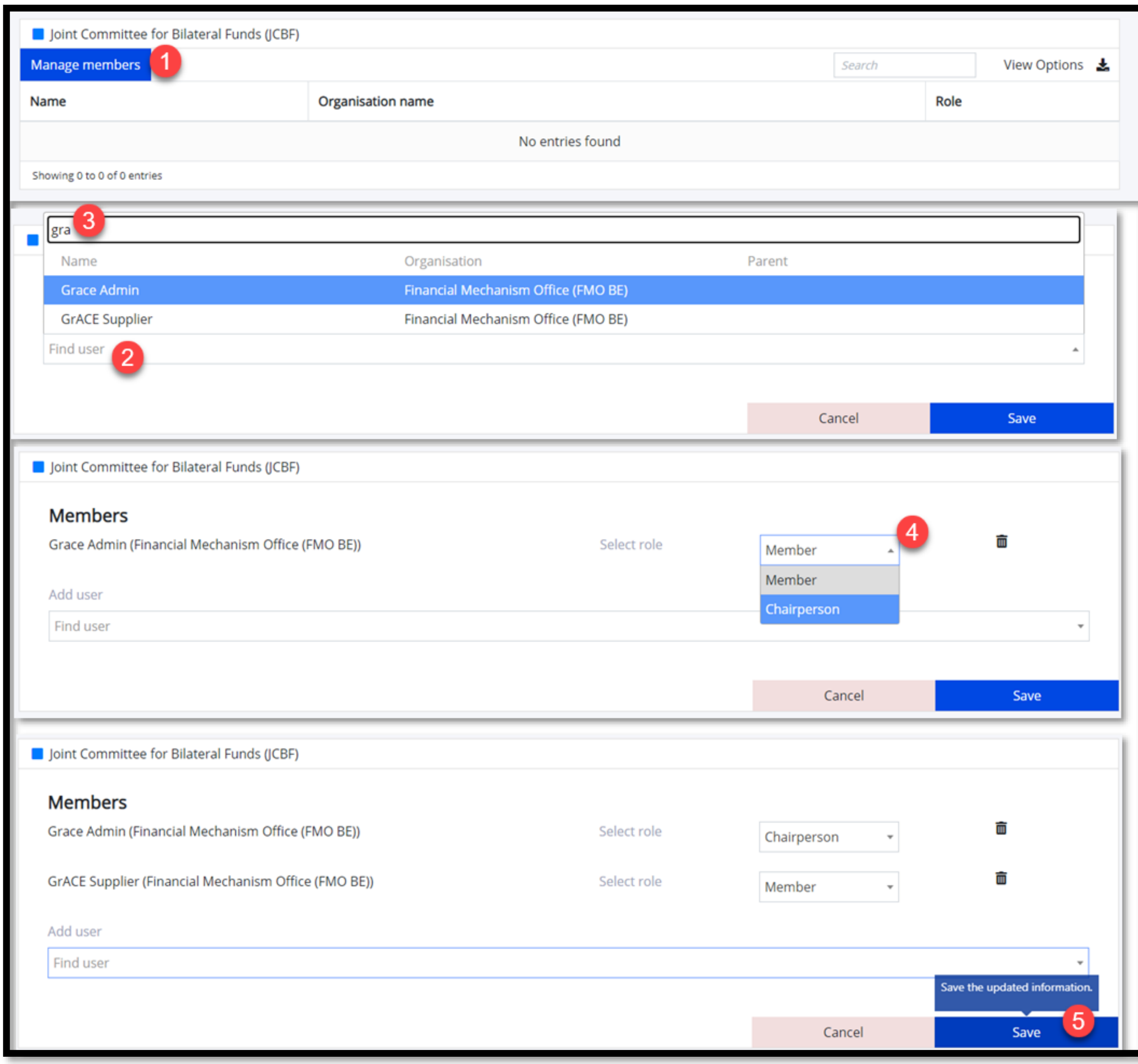
- **Activate contact** to make the user's details visible as an active contact in your organisation
- If the user (log in functionality) is inactive: **Send user activation request** to FMO

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

As a National Focal Point (NFP) user, you can edit the Joint Committee for Bilateral Funds (JCBF) from your country page. Open the Contacts tab, and you will see JCBF presented. Here, you can add users from your own organisation and FMO. You can also change the chairperson and remove members.

Note: you cannot see details for or add members from Donor organisations as this is maintained by the FMO.

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

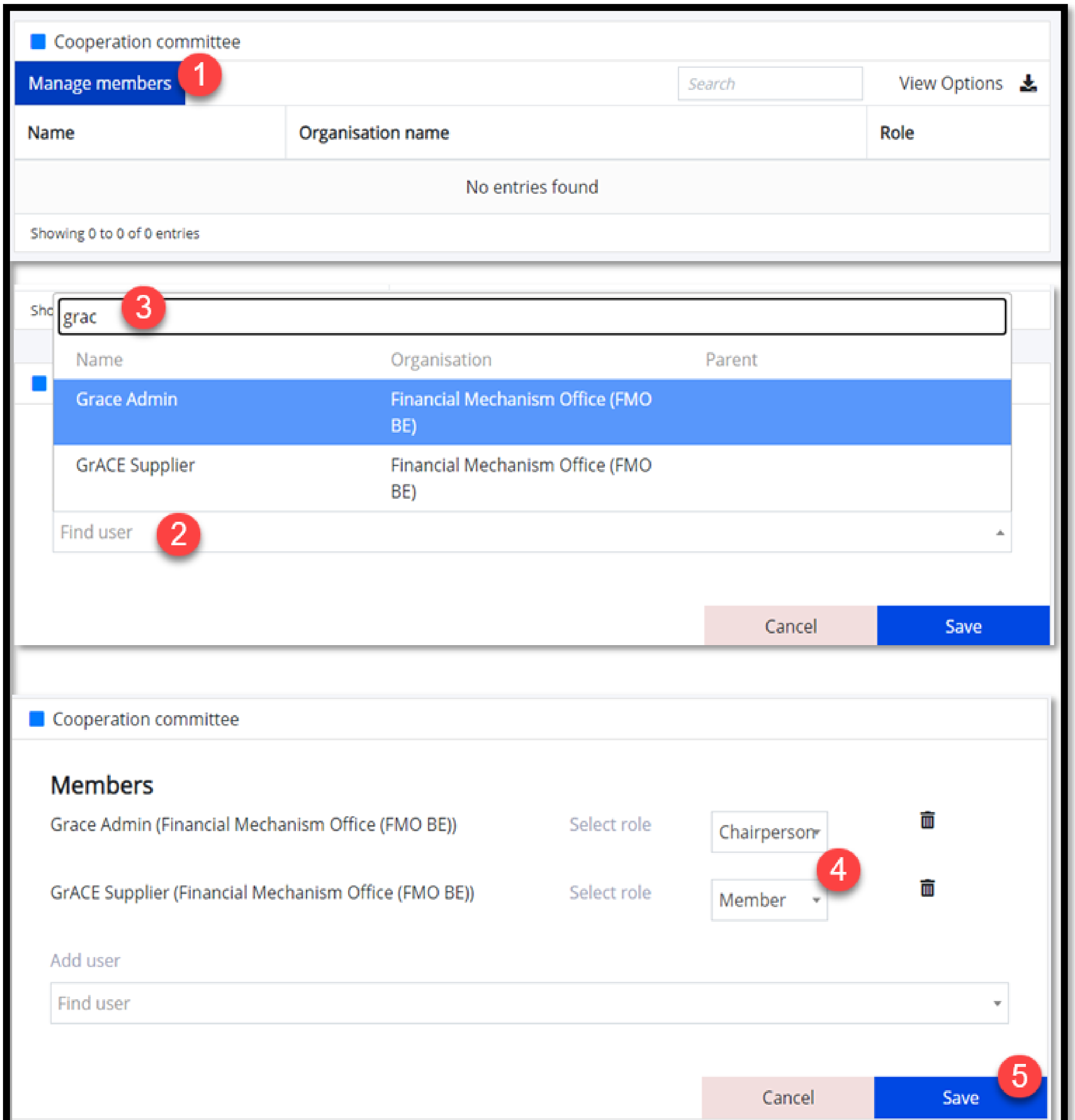


9. Manage Cooperation Committee members for a programme (by PO/FO)

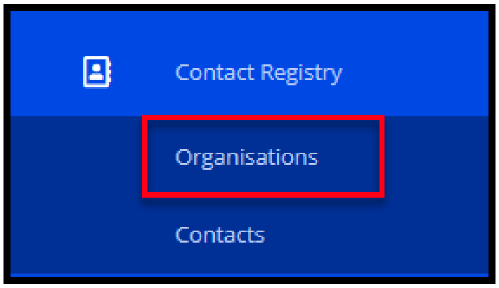
If the programme has a Donor Programme Partner (DPP) or an International Partner Organisation (IPO), there will be a Cooperation Committee option from the Programme site. Here, the Programme Operator (PO) or Fund Operator (FO) can add and amend the roles of the committee members.

Note: Programme/Fund Operators will not be able to add contacts from the Donor organisations as this is maintained by the FMO.

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



10. View Contacts Registry – Organisation



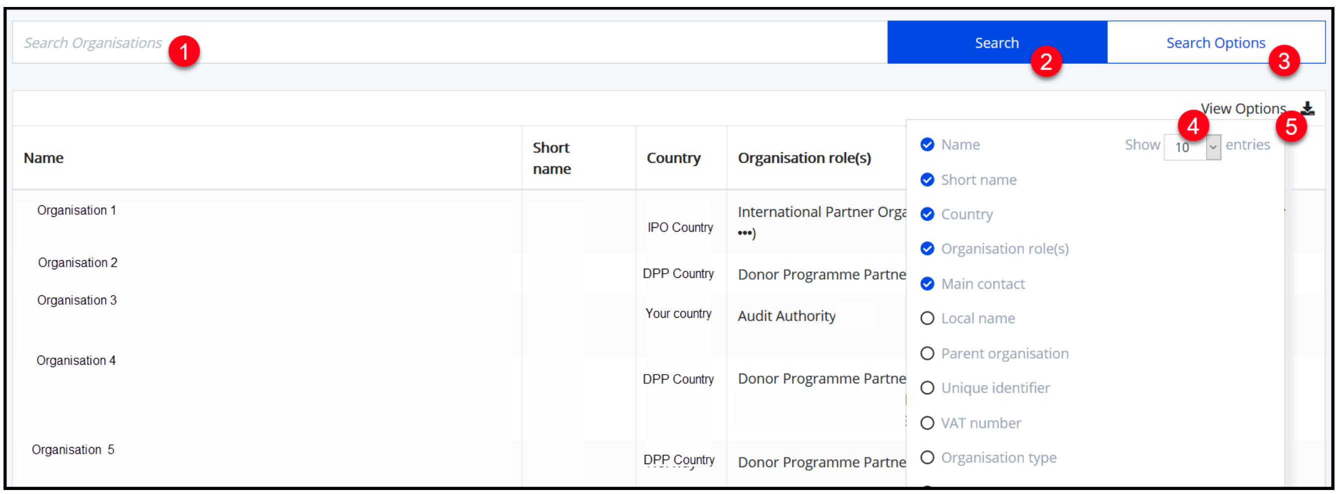
You can access the list of organisations stored in GrACE by going to **Contact Registry / Organisations** from the blue left side menu.

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

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

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

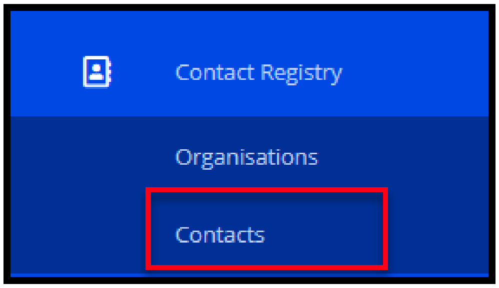
By clicking on **View Options**, you can add/remove further fields to this list (4). By clicking on the download symbol (5), you can export this list to Excel.



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

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

11. View Contacts Registry – Contacts



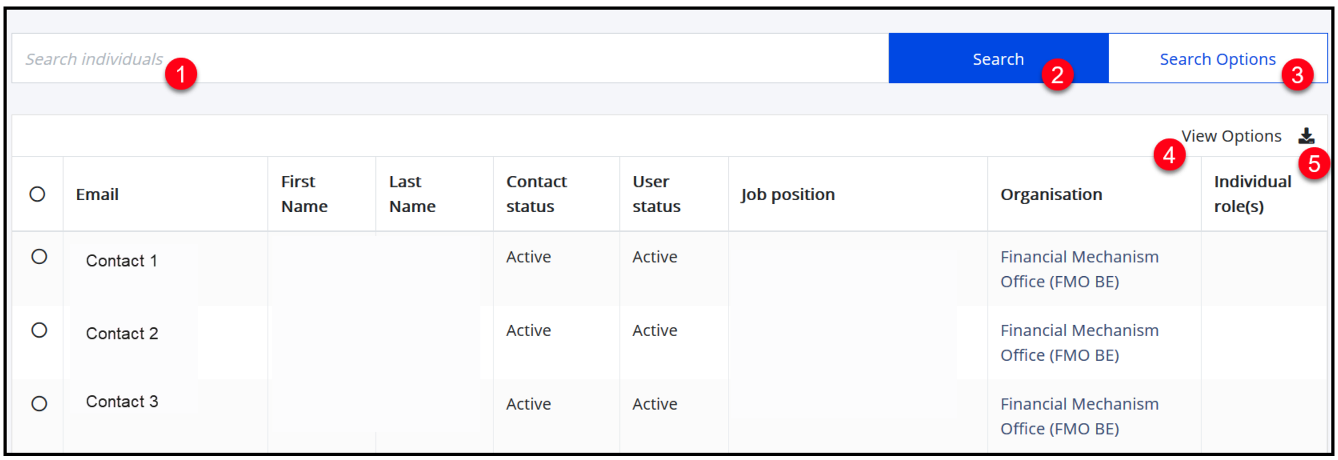
You can access the list of organisations stored in GrACE by going to **Contact Registry / Contacts** from the blue left side menu.

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

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

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

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



12. Version control revision log

Below you can see what has changed between each revision of the document:

Version	Date	Author	Rationale
1.0	10 July 2025	Silje Lærk	First version