



e-COST Action Management Tool (eCAMT) User Guide

Version 2015-08-06



COST is supported by
the EU Framework Programme
Horizon 2020

COST Association
Avenue Louise 149 | 1050 Brussels, Belgium
t: +32 (0)2 533 3800 | f: +32 (0)2 533 3890
office@cost.eu | www.cost.eu

Contents

Introduction	2
Summary process overview.....	3
1. Proposer accepts e-COST role “Proposer” and assigns MC Chair candidate and GH candidate SR (Proposer)	4
1.1 Proposer accepts the e-COST role “Proposer”	4
1.2 Proposer assigns the “MC Chair candidate” and “Grant Holder institution candidate Scientific Representative(s)”	4
2. Creating Grant Holder (candidate) institution profile (Grant Holder/ candidate).....	8
2.1 Grant Holder Scientific Representative (GHSR)	8
2.2 Grant Holder Financial Representative (GHFR)	10
2.3 MC appointment of Grant Holder institution	11
2.4 Assignment of Grant Holder institution to Grant Period in e-COST by COST Association AO (AO)	11
2.5 Grant Holder Legal Representative (GHLR) and Grant Holder Manager/ Administrator Representative (GH M/A R)	12
2.6 Grant Holder bank account encoding in e-COST by GHFR (GHFR).....	14
3. Encode MC1 meeting date and Grant Period dates and allocated budget (Science Officer)	17
4. Work & Budget Plan (WBP) drafting / revising, submission and approval (MC Chair/ COST Association/ MC)	18
4.1 Review MoU objectives, enter/ update WG Leader names and number of participants	18
4.2 Work & Budget Plan (WBP) drafting / revising and submission (Chair)	18
4.3 Work and Budget Plan approval (COST Association, MC Members).....	22
5. Generation and (electronic) signing of Action Grant Agreement (AGA) and Annex A (AO, GHLR, COST Director)	26
5.1 Setting instalment percentages (AO)	26
5.2 Generating and checking AGA and Annex A (AO and COST Finance))	26
5.3 Grant Holder (electronically) signs the Action Grant Agreement (AGA) and Annex A and Grant Period activated (Grant Holder Legal Representative (GHLR)).....	28
5.4 COST Association (electronically) signs the Action Grant Agreement (AGA) and Annex A (COST Association Administration Director)	29
5.5 Payment of the first instalment	31
Annex I Roles and Acronyms	32

Introduction

This user guide explains the main functions of the newly released e-COST Action Management Tool (eCAMT). The guide is structured in five sections describing the main functionalities of the eCAMT. Screen shots and examples of automatic emails “e-notifications” are provided throughout the document.

Important (description of roles):

“Proposer”

- the e-COST role allocated to the person that led the proposal of an Action that has been approved by the CSO but has not yet held its first Management Committee meeting (therefore there is no Chair)
- enables the Proposer to assign in e-COST the following roles:
 - “MC Chair candidate”
 - “Grant Holder institution candidate(s)” by selecting the “Grant Holder institution candidate Scientific Representative” from a list of Management Committee members

“MC Chair candidate”

- Assigned in e-COST by the “Proposer”, only one MC Chair candidate can be assigned,
- has access to the online Work and Budget Plan drafting tool in order to assist them in preparing a draft Work and Budget Plan for presentation and discussion at the first MC meeting,
- after the first MC meeting access to the Work and Budget Plan will be assigned to the Chair elected by the Management Committee who will then further revise the Work and Budget Plan according to the MC discussions,

“Grant Holder institution (candidate) Scientific Representative”

- must be an MC Member

“Grant Holder institution (candidate) Financial Representative (GHFR)”

- the Grant Holder institution (candidate) representative that has the authority to approve expenditures relating to the Grant Agreement and to commit the institution to working within the COST rules (eg the flat rate components of participant reimbursements)

“Grant Holder Legal Representative (GHLR)”

- the Grant Holder institution representative that has the authority to sign the Action Grant Agreement on the institution’s behalf

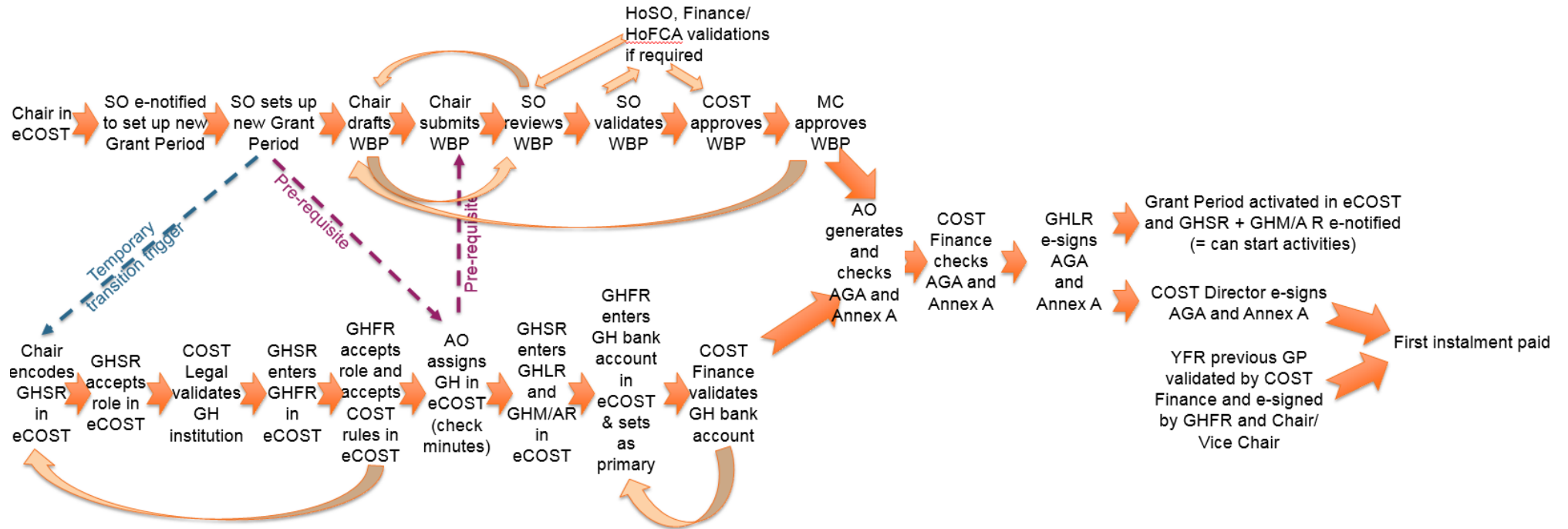
“Grant Holder Management/ Administration Representative (GHM/AR)”

- the Grant Holder institution representative that will carry out the administrative tasks associated with the Grant Holder activities – eg sending official e-COST invitations and approvals to participants and processing reimbursement requests in accordance with the COST rules



Summary process overview

The following diagram depicts the main steps only. It does not show every message and confirmation.



COST is supported by the EU Framework Programme Horizon 2020

COST Association
 Avenue Louise 149 | 1050 Brussels, Belgium
 t: +32 (0)2 533 3800 | f: +32 (0)2 533 3890
 office@cost.eu | www.cost.eu

1. Proposer accepts e-COST role “Proposer” and assigns MC Chair candidate and GH candidate SR (Proposer)

1.1 Proposer accepts the e-COST role “Proposer”

After the approval of a proposal by the Committee of Senior Officials (CSO) has been communicated to the proposer, they will receive an email from e-COST inviting them to click on a link to accept the e-COST role “Proposer” for the newly approved Action.

To: anne.mangen@uis.no
C: tdy@rcn.no
==Original message follows==

Dear Dr. Anne Mangen,

I. You have been allocated the e-COST role “proposer”. Please click on the following link to accept this role (if you do not already have an e-COST account you will have to create one, using the same email address at which you received this email)

http://test.cost.eu/nomination/registration/2_89ec9108a36bb3e40c8e43bfb768823e

II. Please make sure that your COST National Coordinator (CNC) uses this email address when nominating you as a MC Member for this Action

III. Once at least 5 COST countries, including your country, have accepted the MoU of this Action you will receive an email asking you to identify the “MC Chair Candidate” (usually the proposer) and the “Grant Holder institution candidate” for the Action.

The Science Officer of the Action will contact you to arrange the first Management Committee meeting.

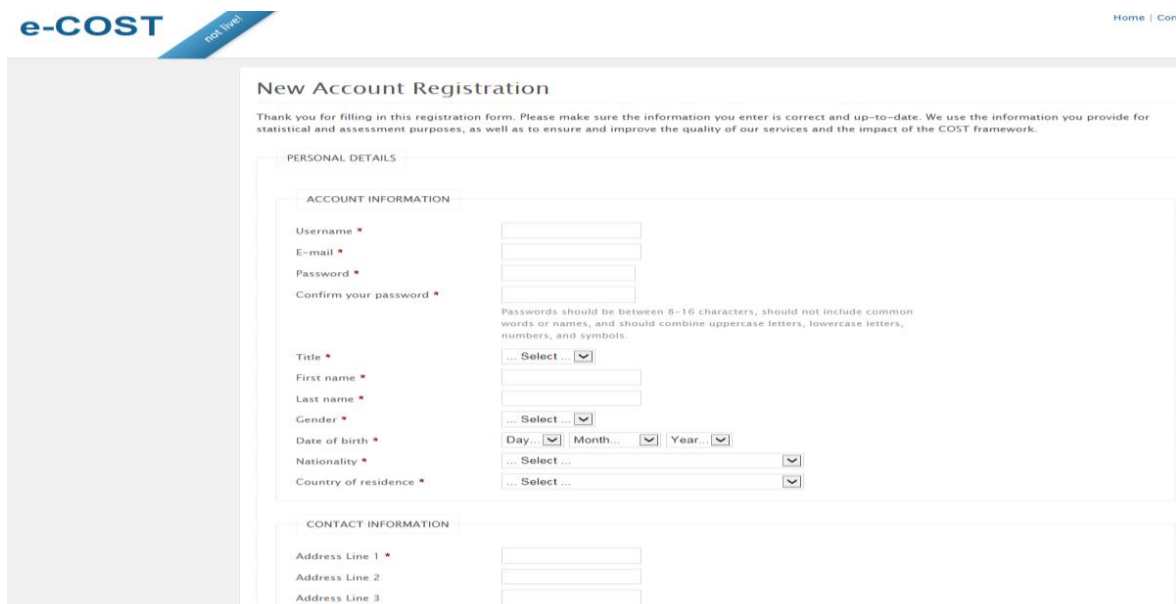
Best regards,

COST Association
Avenue Louise 149
1050 Brussels | Belgium
www.cost.eu

Ref: E-1

Figure 1 Email received by Proposer requesting they accept the e-COST role “Proposer”

When the proposer clicks on the link, they will be prompted to either log in to e-COST (if they have an existing e-COST account) or, in the rare case that they do not already have an existing e-COST account, to create an e-COST account and then login in order to accept the role.



The screenshot shows the 'New Account Registration' page on the e-COST website. The page has a blue header with the e-COST logo and a 'Home | Cont' link. Below the header, there is a section titled 'PERSONAL DETAILS' which contains 'ACCOUNT INFORMATION' and 'CONTACT INFORMATION' sections. The 'ACCOUNT INFORMATION' section includes fields for Username, E-mail, Password, Confirm your password, Title (dropdown), First name, Last name, Gender (dropdown), Date of birth (Day, Month, Year dropdowns), Nationality (dropdown), and Country of residence (dropdown). A note specifies that passwords should be between 8-16 characters and include uppercase letters, lowercase letters, numbers, and symbols. The 'CONTACT INFORMATION' section includes three fields for Address Line 1, Address Line 2, and Address Line 3.

Figure 2 Registration of a new e-COST account (if Proposer does not already have one)

1.2 Proposer assigns the “MC Chair candidate” and “Grant Holder institution candidate Scientific Representative(s)”

1.2.1 The proposer assigns in e-COST the “MC Chair candidate” (the one person that will have access to the eCAMT Work and Budget Plan drafting functionality in preparation for the first

Management Committee) meeting by first indicating whether they are or are not a candidate for the position of MC Chair.

- If the proposer indicates that they are a candidate for the position of MC Chair, the screen immediately moves to the assignment of the Grant Holder institution candidate(s) Scientific Representative(s) (section 1.2.2),
- If the proposer indicates that they are not a candidate for the position of MC Chair, e-COST will provide a list of all the MC Members nominated so far and the Proposer must select from the list the one MC Member that is the MC Chair candidate,
- There is also an option to select that the country of the intended MC Chair candidate has not yet made its MC Member nominations and request to be reminded when a specified country has made these nominations.



Dashboard
MC1 Decisions
Assign Candidates
Grant Holders
Grant Periods
Action Overview

Assign MC Chair and Grant Holder Candidates

COST Action IS1404
Individuals, Societies, Cultures and Health

Evolution of reading in the age of digitisation (E-READ)

Step 1: Assign MC Chair candidate

The Action Proposer of the Action is Dr Anne Mangen

Please encode the following information for COST Action IS1404 candidates.

Dr Anne Mangen is candidate for MC Chair of this Action

Dr Anne Mangen is not a candidate for MC Chair of this Action and therefore I wish to select a MC Chair Candidate from the list of MC Members

Please select the MC Chair candidate by clicking in the box at the end of the row

Name	Country	Institution	Select MC Chair
Charalambos Vrasidas	Cyprus	Centre for the Advancement of Research and Development in Educational Technology - CARDET	<input type="radio"/>
Jiri Travnicek	Czech Republic	Institute of Czech Literature - Czech Academy of Sciences	<input checked="" type="radio"/>
Yvonne Kammerer	Germany		<input type="radio"/>
Jf Arthur Jacobs	Germany	FU Berlin	<input type="radio"/>
Gitte Balling	Denmark	University of Copenhagen	<input type="radio"/>
Theresa Schilhab	Denmark	University of Aarhus	<input type="radio"/>
Jf Nuria Castells Gómez	Spain	University of Barcelona	<input type="radio"/>
Ladislao Salmeron	Spain	University of Valencia	<input type="radio"/>
Jf Thierry BACCINO	France	University of Paris 8	<input type="radio"/>
Jf Brigitte OUVRY-VIAL	France	Université du Maine	<input type="radio"/>
Johanna Kaakinen	Finland	University of Turku	<input type="radio"/>
Jf Paavo Leppänen	Finland	University of Jyväskylä	<input type="radio"/>

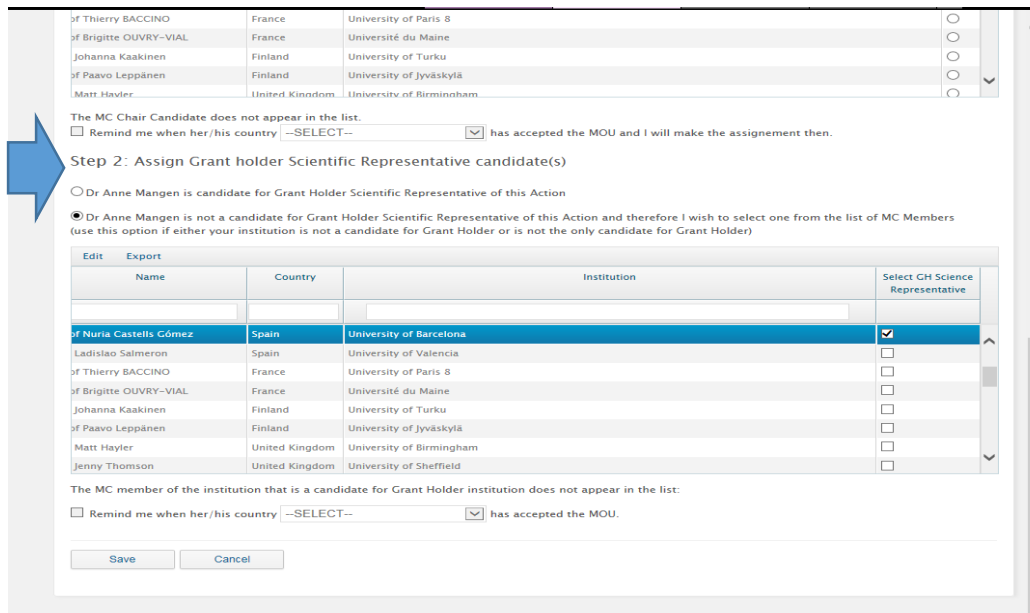
Figure 3 If not themselves a candidate for the position of MC Chair the proposer assigns the MC Chair candidate from the list of MC members.

1.2.2 The proposer assigns in e-COST at least one “Grant Holder institution candidate Scientific Representative(s)” (GHcSR) so that before the first Management Committee meeting where the Grant Holder institution for the Action will be officially appointed by the Management Committee:

- the COST Association can decide whether or not it would accept the Grant Holder institution candidate(s), and
- the Financial Representatives of any institutions that would be accepted by the COST Association can indicate that their institution would work within the COST rules (eg flat rate components of reimbursements).

Again the proposer first indicates whether or not their institution is a candidate for Grant Holder institution (and themselves as Grant Holder Scientific Representative):

- If the proposer indicates that they are a candidate for the position of Grant Holder Scientific Representative, this part of the process is complete,
- If the proposer indicates that they are not a candidate for Grant Holder Scientific Representative, e-COST will provide a list of all the MC Members nominated so far and the Proposer must select from the list the MC Member that is the Grant Holder candidate(s) Scientific Representative(s).
- There is also an option to select that the country of the intended Grant Holder candidate Scientific Representative has not yet made its MC Member nominations and request to be reminded when a specified country has made these nominations



The MC Chair Candidate does not appear in the list.
 Remind me when her/his country --SELECT-- has accepted the MOU and I will make the assignment then.

Step 2: Assign Grant holder Scientific Representative candidate(s)

Dr Anne Mangen is candidate for Grant Holder Scientific Representative of this Action

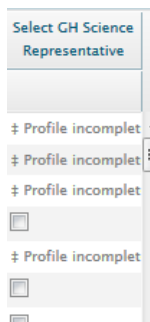
Dr Anne Mangen is not a candidate for Grant Holder Scientific Representative of this Action and therefore I wish to select one from the list of MC Members (use this option if either your institution is not a candidate for Grant Holder or is not the only candidate for Grant Holder)

Name	Country	Institution	Select GH Science Representative
Dr Nuria Castells Gómez	Spain	University of Barcelona	<input checked="" type="checkbox"/>
Ladislao Salmeron	Spain	University of Valencia	<input type="checkbox"/>
Dr Thierry BACCINO	France	University of Paris 8	<input type="checkbox"/>
Dr Brigitte OUVRY-VIAL	France	Université du Maine	<input type="checkbox"/>
Johanna Kaakinen	Finland	University of Turku	<input type="checkbox"/>
Dr Paavo Leppänen	Finland	University of Jyväskylä	<input type="checkbox"/>
Matt Hayler	United Kingdom	University of Birmingham	<input type="checkbox"/>
Jenny Thomson	United Kingdom	University of Sheffield	<input type="checkbox"/>

The MC member of the institution that is a candidate for Grant Holder institution does not appear in the list:
 Remind me when her/his country --SELECT-- has accepted the MOU.

Figure 4 The proposer indicates whether they are a candidate for GHcSR, and if not, assigns the GHcSR from the list of MC members

In order for it to be possible to assign a MC Member as a MC Chair candidate or a Grant Holder candidate Scientific Representative the MC Member must have a complete eCOST profile. If when trying to make the assignment the Proposer/ Chair finds the following symbol/ message “‡ Profile incomplete” instead of a check box it means that that MC Member does not have a complete eCOST profile. It is necessary to contact that MC Member and ask them to log into eCOST and click on “Home” where an overview of the missing information will be provided and then to click on the relevant buttons on the left hand menu in order to complete the missing information.



The MC Chair candidate and the Grant Holder candidate Scientific Representative each receive an automatic email asking them to accept this role in e-COST.

MC Chair candidate email

To: JiriTravnicek@seznam.cz
Cc: Rossella.Magli@cost.eu

==Original message follows==

Dear Prof Jiri Travnicek,

You have been identified as a candidate for the role of Chair of the Management Committee of COST Action. Please click below to accept the role "MC Chair Candidate".

http://test.cost.eu/nomination/registration/1_ff84f3b395ebd6d0726aad1e4a26ef68

Accepting the role is necessary in order for you to be able to begin drafting the Work & Budget Plan for discussion at the first MC meeting. Once the SO has established the tentative start and end dates for the first Grant Period in e-COST you will receive a hyperlink enabling you to begin drafting the Work and Budget Plan. The official election of the Management Committee of the MC Chair will take place at the first Management Committee meeting.

If you have any questions please contact the Science Officer of IS1404, Ms Rossella Magli, Rossella.Magli@cost.eu

Best regards,

COST Association
Avenue Louise 149

Grant Holder candidate Scientific Representative email

To: nuria.castells@ub.edu
Cc: Rossella.Magli@cost.eu

==Original message follows==

Dear Prof Nuria Castells Gómez,

Your institution has been assigned as a candidate for the role of Grant Holder institution of COST Action and Grant Holder Scientific Representative. Please click here to accept this role.

http://test.cost.eu/nomination/registration/5_2fcc51387a6cc5f71c86c1a82db3c860

Once you have accepted the role the COST Association will assess whether your institution would be accepted as a Grant Holder institution.

If the COST Association would accept the institution as a potential Grant Holder then you will be asked to enter the email address of the person that would be the Grant Holder Financial Representative (the person that would be responsible for the Action Financial Reports generated by the Grant Holder) so that this person can confirm the institution's agreement to work within the COST rules.

If your institution is appointed as the Grant Holder institution for COST Action IS1404 at the first Management Committee meeting (2014-11-13) then you will be asked to enter the email addresses of the people that would be the Grant Holder institution Legal Representative (the person that will sign the Grant Agreement with COST), the Grant Holder institution Administration Representative (the person who will provide the administrative coordination for the Action activities, in e-cost: eg. sending invitations, verifying expense requests etc).

Further information about the role of the Grant Holder is available in the following documents:

- Section 2 of the COST Vademecum Part 1 www.cost.eu/COST_Vademecum_Part_1
- Q&A for Grant Holders www.cost.eu/QA_Grant_Holders
- Grant Agreement Template www.cost.eu/grant_agreement_template

If you have any questions please contact the Administrative Officer of COST Action IS1404 Ms Valentina Vignoli (valentina.vignoli@cost.eu).

Best regards,

Figure 5 Emails received by MC Chair candidate and Grant Holder institution candidate(s) Scientific Representative(s)

Upon receiving the above email:

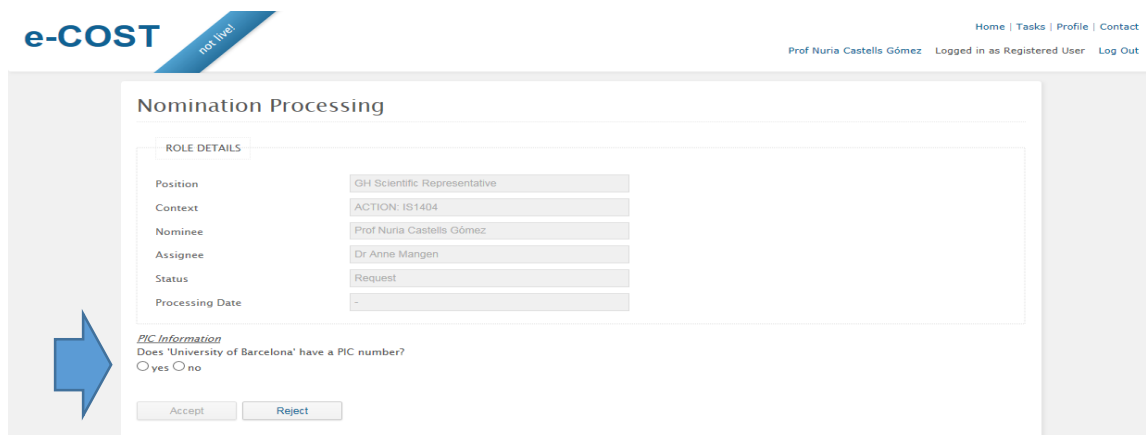
- the GH candidate(s) SR proceeds as described in section 2.1,
- the MC Chair candidate accepts the role and waits to receive the email described in section 4.2 which contains the hyperlink via which the Work and Budget Plan can be drafted in e-COST (Chairs that have already been appointed by the Management Committee do not follow this "candidate" process).

2. Creating Grant Holder (candidate) institution profile (Grant Holder/ candidate)

2.1 Grant Holder Scientific Representative (GHSR)

2.1.1 After being notified by email, the GH (candidate) SR accepts his/her assignment by clicking on the link in the e-notification. The GH (candidate) SR is prompted to log in to e-COST and will see the screen shown below. The role details are prefilled, but the GH candidate SR must indicate whether the GH (candidate) institution has a European Commission Participant Identification Code (PIC) and if so enter this code into the field that appears. The GH candidate SR then either accepts or rejects the assignment as GH candidate SR:

- Acceptance leads to the next step,
- Rejection results in the Proposer/ Chair being notified to assign another Grant Holder candidate Scientific Representative.



e-COST not logged in

Home | Tasks | Profile | Contact
Prof Nuria Castells Gómez Logged in as Registered User Log Out

Nomination Processing

ROLE DETAILS	
Position	GH Scientific Representative
Context	ACTION: IS1404
Nominee	Prof Nuria Castells Gómez
Assignee	Dr Anne Mangen
Status	Request
Processing Date	-

PIC Information
Does 'University of Barcelona' have a PIC number?
 yes no

Accept Reject

Figure 6 Screen Grant Holder Scientific Representative sees after clicking on hyperlink in email they receive (and logging in to e-COST)

If the GH candidate SR accepts the assignment, s/he receives an automatic email (below) confirming the acceptance and asking them to review and update their profile, as well as the institutional profile.

To: nuria.castells@ub.edu
Cc: valentina.vignoli@cost.eu

===Original message follows===

Dear Prof Nuria Castells Gómez,

You have accepted the role of Grant Holder candidate Scientific Representative for **IS1404**. This assignment will only become official after the decision of the Management Committee at the first MC meeting.

In order to prepare for an efficient start of the Action please click on the following link :

<http://test.cost.eu/?module=user&action=indexProfile>

and

- review your own profile
- review the institutional profile

Once this is done, the COST Association will assess whether your institution fulfils the conditions to become a Grant Holder.

0 of 0 - -

Figure 7 Email received by Grant Holder candidate Scientific Representative after confirming acceptance of the GH(c)SR position

Before accepting the role of GHSR the GHSR should update their own profile, ensuring that they include the Organisation's (legal) name in the eCOST fields "Name of Organisation" and again in the field "Name". The Name of Organisation and Name should be the name of the legal entity that the VAT number is associated with. No reference to departments, units, institutes etc should be included. The

VAT/ Fiscal identification number must be added and, where applicable the EC Participant Identification Code (PIC) should also be added.

Name of Organisation *

Do not include here the name of your department, unit or laboratory!

Fiscal Code/VAT Number

PIC Number

The address of your Primary Institution will be used by the COST Association for any postal correspondence as a DC/MC Member or Expert.

You work in national headquarters of your organisation? * Yes No

Name *

Department/Unit/Laboratory Name

Figure 8 Completion of the GHSR's profile prior to acceptance of GHSR role.

2.1.2 If after entering the VAT number and clicking to submit the organisation to COST legal the GHSR sees on their screen the message that there is already a GH organisation in eCOST with that VAT number the GHSR should select to submit this pre-existing organisation. If some of the organisational details are incorrect (eg the "Organisation Name" or "Name" fields include references to an institute/ department of the GH institution) then the GHSR should immediately click on Edit button and correct this information.

2.1.3 Once completed this triggers a notification to the COST Association who determines whether or not the Grant Holder institution candidate meets the requirements to be a COST Action Grant Holder institution. If the COST Association:

- does not accept (validate) the candidate GH institution the Chair is asked to assign another candidate Grant Holder institution
- requires more information before deciding whether or not to accept the candidate GH institution the GHcandidateSR will receive an email indicating the additional information required,
- does accept (validate) the candidate GH institution the process continues as described below.

2.1.4 The GH SR receives an email informing him/her about the validation by the COST Association and asking him/her to follow a hyperlink to e-COST and encode the details (title, first name, last name and email address) of the person who will be the institution's Grant Holder Financial Representative (GH FR), that is, the person that will sign Action Financial Reports submitted by the Grant Holder.

To: nuria.castells@ub.edu

===Original message follows===

Dear Prof Nuria Castells Gómez,

The COST Association has accepted "University of Barcelona" as a valid potential Grant Holder institution.

Please click on the following link <http://test.cost.eu/action/JS1404/grantHolder/manage/20> to enter the email address of the person who will be your institution's Grant Holder Financial Representative (the person who will sign Financial Reports at the end of each Grant Period).

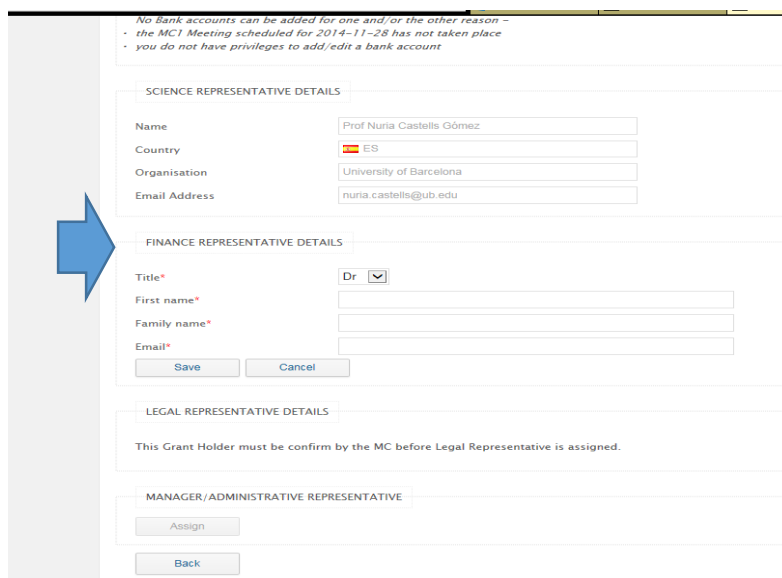
The Grant Holder Financial Representative will receive an e-notification from e-COST asking him/her to confirm before the first Management Committee meeting the institution's commitment to apply the COST rules.

Best regards,

COST Association
Avenue Louise 149
1050 Brussels | Belgium
www.cost.eu

Ref: E-11

Figure 9 Email received by Grant Holder (candidate) Scientific Representative after validation of the Grant Holder institution candidate by COST Association



No bank accounts can be added for one and/or the other reason -
 • the MC1 Meeting scheduled for 2014-11-28 has not taken place
 • you do not have privileges to add/edit a bank account

SCIENCE REPRESENTATIVE DETAILS

Name: Prof Nuria Castells Gómez
 Country: ES
 Organisation: University of Barcelona
 Email Address: nuria.castells@ub.edu

FINANCE REPRESENTATIVE DETAILS

Title*: Dr
 First name*:
 Family name*:
 Email*:
 Save Cancel

LEGAL REPRESENTATIVE DETAILS

This Grant Holder must be confirm by the MC before Legal Representative is assigned.

MANAGER/ADMINISTRATIVE REPRESENTATIVE

Assign
 Back

Figure 10 Screen in which the GH(c)SR enters the Grant Holder (candidate) Financial Representative contact details

2.2 Grant Holder Financial Representative (GHFR)

The GH FR candidate will then receive an email (see below) asking him/her to accept the role and verify that the institution would carry out the Grant Holder role in accordance with COST rules. When the GHFR clicks on the hyperlink in the email they will be directed to either log in to e-COST (if they already have an e-COST profile) or to create an e-COST profile. The GHFR should not select the box to be considered as a COST Expert as doing so will require the entry of a more comprehensive e-COST profile (including cv and classification of scientific expertise).

Dear Mr Thierry Baccino

The proposer of COST Action IS1404 has indicated that at the first Management Committee meeting, the MC will be asked to appoint University of Barcelona as Grant Holder for the Action. Under the COST rules Prof Nurria Castells Gomez will be known as the Grant Holder Scientific Representative.

Prof Nurria Castells Gomez as Grant Holder Scientific Representative, has indicated that you will be the "Grant Holder Financial Representative" for COST Action IS1404. The Grant Holder Financial Representative has two tasks:

- confirming that the Grant Holder institution will carry out the role of Grant Holder in compliance with the COST rules and without imposing additional burdens on the participants in the Action, and
- signing the Financial Reports on behalf of the Grant Holder institution (the reports are generated automatically in e-COST, the system that must be used by the Grant Holder institution to carry out the Grant Holder tasks).

Please do the following (you will have to log in to e-COST in order to do so, if you do not already have an e-COST profile you will be asked to create one):

Click the following link to accept the position of Grant Holder Financial Representative, this must be done before the MC1 Meeting date (which has ended): https://e-services.cost.eu/nomination/registration/5_b4f65908da1a3fe0cb26a2c499b

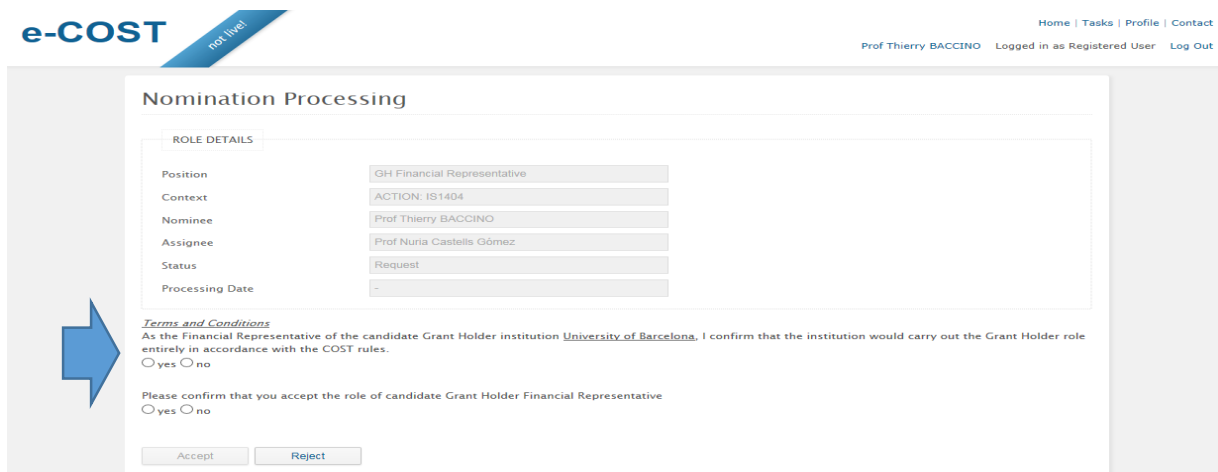
1. confirm that your institution accepts to work within the COST rules (this must be done before which has ended)
2. enter the institutional bank account to which funds under the Grant Agreement for COST Action IS1404 should be paid

Further information about the role of the Grant Holder is available in the following documents:

- Section 2 of the COST Vademecum | www.cost.eu/Vademecum
- Q&A for Grant Holders www.cost.eu/QA_Grant_Holders
- Grant Agreement Template www.cost.eu/grant_agreement_template

If you need assistance with the process or further information please contact the Administrative Officer of COST Action IS1404.

Figure 11 Email received by GH(c)FR requesting acceptance of the GHFR role and agreement to work within the COST rules.



e-COST not live!

Home | Tasks | Profile | Contact
Prof Thierry BACCINO Logged in as Registered User Log Out

Nomination Processing

ROLE DETAILS

Position	GH Financial Representative
Context	ACTION: IS1404
Nominee	Prof Thierry BACCINO
Assignee	Prof Nurria Castells Gómez
Status	Request
Processing Date	-

Terms and Conditions
As the Financial Representative of the candidate Grant Holder institution University of Barcelona, I confirm that the institution would carry out the Grant Holder role entirely in accordance with the COST rules.
 yes no

Please confirm that you accept the role of candidate Grant Holder Financial Representative
 yes no

Accept Reject

Figure 12 Screen via which GH(c)FR enters acceptance of the GHFR role and agreement to work within the COST rules

2.3 MC appointment of Grant Holder institution

A Grant Holder institution is appointed by the Management Committee at the first Management Committee Meeting of every Action. A new Grant Holder can be appointed by the Management Committee at any time either at a MC meeting (recorded in the minutes thereof) or via written procedure.

2.4 Assignment of Grant Holder institution to Grant Period in e-COST by COST Association AO (AO)

Once the MC Chair candidate and the SR and FR of the Grant Holder institution candidate(s) have completed the tasks described above and the Grant Holder institution has been appointed by the Management Committee the COST Association Administrative Officer (AO) confirms in e-COST (using the

“Management Tools” option) the MC Chair, Vice Chair and Grant Holder institution appointed by the Management Committee.

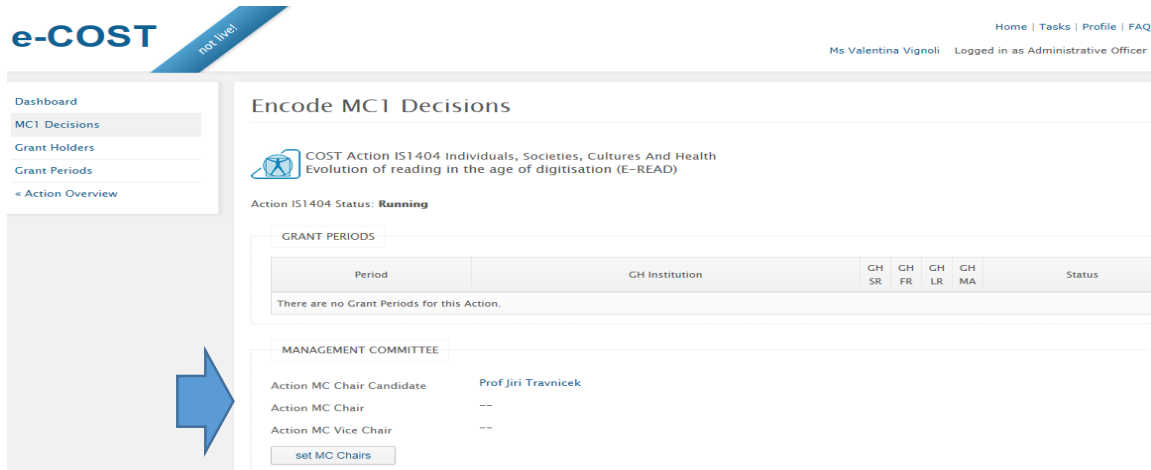


Figure 13 The screen view through which the COST Association Administrative Officer encodes the MC Chair and Vice Chair.

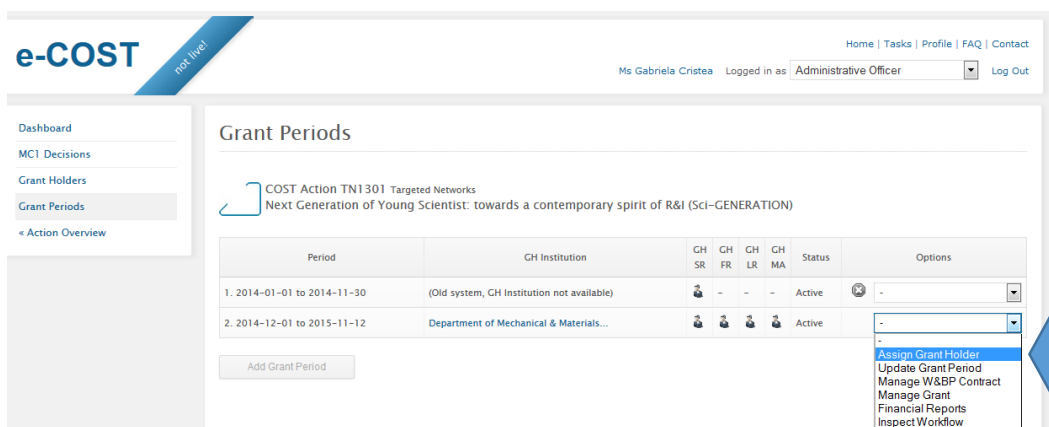


Figure 14 The screen view through which the COST Association Administrative Officer assigns the Grant Holder institution for a Grant Period

2.5 Grant Holder Legal Representative (GHLR) and Grant Holder Manager/ Administrator Representative (GH M/A R)

The GH SR of the Grant Holder institution appointed by the MC will then receive an email (see below) asking him/her to encode title, first name, last name and email address of the candidates for the positions of the Grant Holder Legal Representative (GH LR) and the GH Management/ Administration (GHM/A R). In order to do so, the GH SR needs to go to “Management Tools”.

Dear Prof Nuria Castells Gómez,

Please enter email addresses of the Legal Representative (the person who will sign the Grant Agreement with COST) and Management/ Administration Representative (the person who will provide the administrative coordination related to the Action activities, in e-cost: eg. sending invitations, verifying expense requests, etc), if you have not already done so.

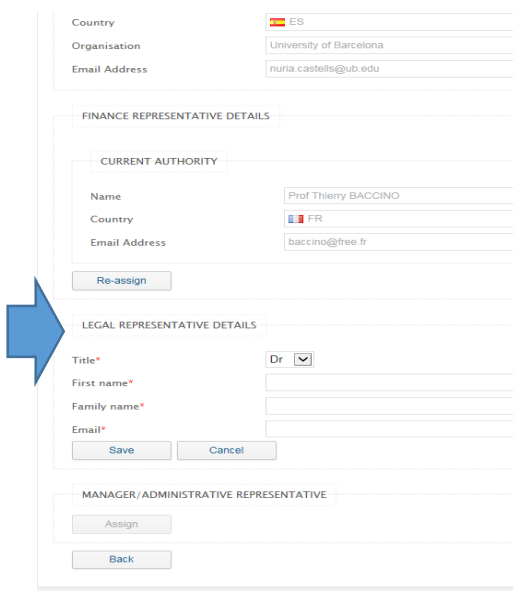
They will each receive an email asking them to complete their profile and accept their role in order for the Grant Agreement documentation to be prepared and signed.

Best regards,

COST Association
 Avenue Louise 149
 1050 Brussels | Belgium
www.cost.eu

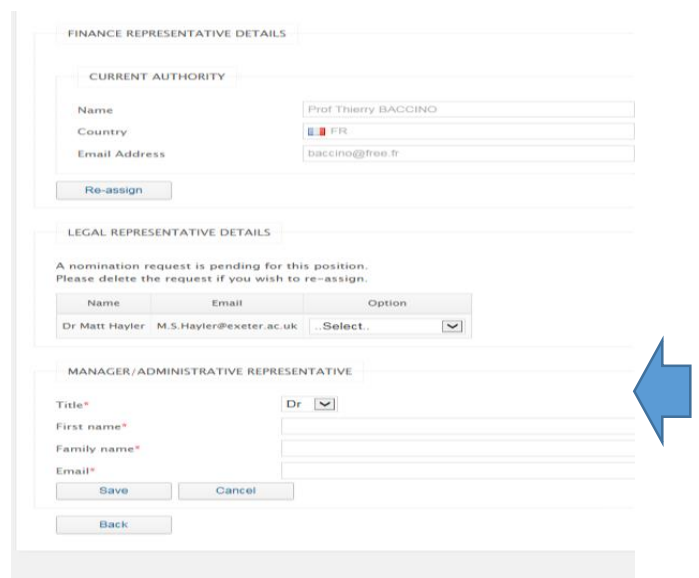
Ref: E-14

Figure 15 The e-notification received by the GHSR once their institution has been assigned as Grant Holder for the Action with a hyperlink via which they can enter the details of the GHLR and GHM/AR



This screenshot shows a web form for entering GHLR details. At the top, there are fields for Country (ES), Organisation (University of Barcelona), and Email Address (nuria.castells@ub.edu). Below this is the 'FINANCE REPRESENTATIVE DETAILS' section, which includes a 'CURRENT AUTHORITY' sub-section with fields for Name (Prof Thierry BACCINO), Country (FR), and Email Address (baccino@free.fr), and a 'Re-assign' button. The 'LEGAL REPRESENTATIVE DETAILS' section has a 'Title*' dropdown (Dr), and fields for First name*, Family name*, and Email*. There are 'Save' and 'Cancel' buttons. At the bottom is the 'MANAGER/ADMINISTRATIVE REPRESENTATIVE' section with an 'Assign' button and a 'Back' button. A blue arrow points to the 'LEGAL REPRESENTATIVE DETAILS' section.

Figure 16 Screen via which GHSR enters GHLR details



This screenshot shows a web form for entering GHM/AR details. It has a title 'FINANCE REPRESENTATIVE DETAILS' and a 'CURRENT AUTHORITY' sub-section with fields for Name (Prof Thierry BACCINO), Country (FR), and Email Address (baccino@free.fr), and a 'Re-assign' button. Below is the 'LEGAL REPRESENTATIVE DETAILS' section with a message: 'A nomination request is pending for this position. Please delete the request if you wish to re-assign.' It includes a table with columns 'Name', 'Email', and 'Option', containing 'Dr Matt Hayler', 'M.S.Hayler@exeter.ac.uk', and a dropdown menu. The 'MANAGER/ADMINISTRATIVE REPRESENTATIVE' section has a 'Title*' dropdown (Dr), and fields for First name*, Family name*, and Email*. There are 'Save' and 'Cancel' buttons, and a 'Back' button at the bottom. A blue arrow points to the 'MANAGER/ADMINISTRATIVE REPRESENTATIVE' section.

Figure 17 Screen via which GHSR enters GHM/AR details

The GH LR candidate receives an email asking him/her to accept the role. By clicking on the link, the candidate will come to a page with prefilled information where he/she can process the nomination.

The GH Management/ Administration representative receives an email asking him/her to accept the role. By clicking on the link, the candidate will come to a page with prefilled information where he/she can process the nomination.

To: M.S.Hayler@exeter.ac.uk
Cc: valentina.vignoli@cost.eu, nuria.castells@ub.edu

===Original message follows===

Dear Dr Matt Hayler,

At the first Management Committee meeting of COST Action IS1404 the Management Committee appointed University of Barcelona as the Grant Holder institution for this Action. The Grant Holder Scientific Representative Prof Nuria Castells Gómez (nuria.castells@ub.edu) has encoded you as the GH Legal Representative [GH-IS1404-4].

To enable the preparation of the Grant Agreement, please follow the link below to confirm your acceptance of GH Legal Representative [GH-IS1404-4] for COST Action IS1404.

http://test.cost.eu/nomination/registration/5_86eb714cad3d58964f11034ceaed4e56

Further information about the role of the Grant Holder is available in the following documents:

- Section 2 of the COST Vademecum: www.cost.eu/COST_Vademecum
- Q&A for Grant Holders www.cost.eu/QA_Grant_Holders
- Grant Agreement Template www.cost.eu/grant_agreement_template

If you need assistance with the process or further information please contact the Administrative Officer of COST Action IS1404, Ms Valentina Vignoli (valentina.vignoli@cost.eu).

Best regards,

COST Association
Avenue Louise 149
1050 Brussels | Belgium
www.cost.eu

Ref: E-15

Figure 18 E-notification received by GHLR containing hyperlink via which they can accept the role of GHLR

To: paavo.ht.leppanen@jyu.fi
Cc: valentina.vignoli@cost.eu, nuria.castells@ub.edu

===Original message follows===

Dear Prof Paavo Leppänen,

At the first Management Committee meeting of COST Action IS1404 the Management Committee appointed University of Barcelona as the Grant Holder institution for this Action. The Grant Holder Scientific Representative Prof Nuria Castells Gómez (nuria.castells@ub.edu) has encoded you as the GH Manager/Administrator [GH-IS1404-4].

To enable the preparation of the Grant Agreement, please follow the link below to your acceptance of GH Manager/Administrator [GH-IS1404-4] for COST Action IS1404.

http://test.cost.eu/nomination/registration/5_c6283ea968a190117da76080c15b42c

Further information about the role of the Grant Holder is available in the following documents:

- Section 2 of the COST Vademecum: www.cost.eu/COST_Vademecum
- Q&A for Grant Holders www.cost.eu/QA_Grant_Holders
- Grant Agreement Template www.cost.eu/grant_agreement_template

If you need assistance with the process or further information please contact the Administrative Officer of COST Action IS1404, Ms Valentina Vignoli (valentina.vignoli@cost.eu).

Best regards,

COST Association
Avenue Louise 149
1050 Brussels | Belgium
www.cost.eu

Ref: E-15

Figure 19E-notification received by GH M/A R containing hyperlink via which they can accept the role of GH M/A R

By clicking on the link, they will come to a page with prefilled information where they can accept the nomination as GH M/A R.

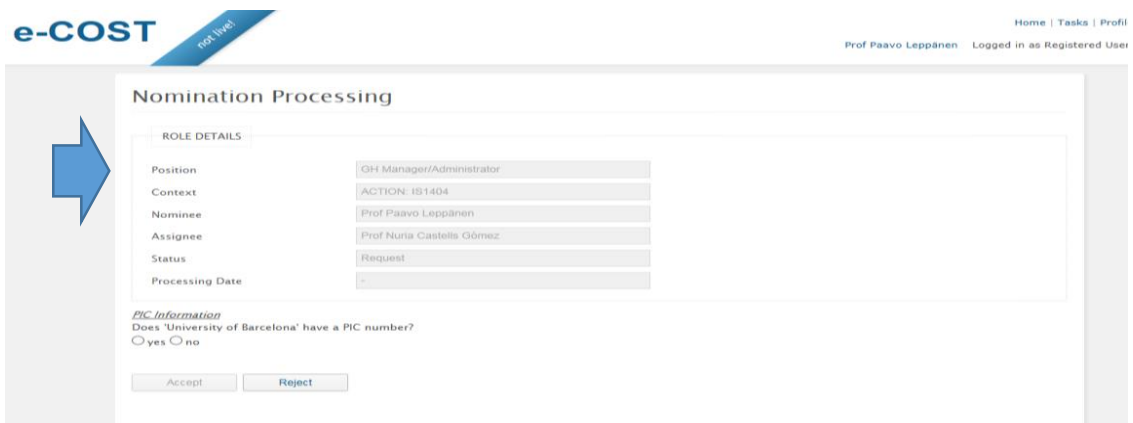


Figure 18-a Screen via which the GHLR and GHA/MR accept their roles

The GHLR and GHM/A R should not select the box to be considered as a COST Expert as doing so will require the entry of a more comprehensive e-COST profile (including cv and classification of scientific expertise).

The GHLR must ensure that the field 'Position/Job Title' related to his/her profile is complete so that this information appears in the Action Grant agreement.

2.6 Grant Holder bank account encoding in e-COST by GHFR (GHFR)

The GH FR receives an email asking them to encode/update the institution bank account. By following the link in the email, the GH FR will be able to add a bank account and click on "Submit". The GHFR should then set it as the primary account (click on "Tasks", "Grant Holder Financial Representative of <Action Code>",

“Bank Accounts” then select “set as primary” next to the bank account) in order to trigger a notification to the COST Financial Unit for validation of the bank account. If the bank account is not set as primary then the process will not continue.

To: baccino@free.fr
Cc: valentina.vignoli@cost.eu

===Original message follows===

Dear Sir/ Madam,

At the first Management Committee meeting of COST Action **IS1404**, the Management Committee appointed "University of Barcelona" as the Grant Holder institution for this Action.

To enable the preparation of the Grant Agreement, please enter the Grant Holder institution bank account to which payments relating to should be made by following the link below:




<http://test.cost.eu/action/IS1404/grantHolder/manage/20>

Best regards,

COST Association
Avenue Louise 149
1050 Brussels | Belgium
www.cost.eu

Ref: E-16

Figure 19 E-notification received by GHLR with hyperlink via which they encode the GH institution bank account

Organisation Name	University of Barcelona
Country	Spain
Fiscal Code/VAT Number	ES
<input type="button" value="Save"/>	
COST LEGAL VALIDATION REPORT	
Has been validated?	Legal Approved
BANK ACCOUNT DETAILS	
<i>No Bank Account added for this Grant Holder Organisation</i>	
<input type="button" value="Add Bank Account"/>	
SCIENCE REPRESENTATIVE DETAILS	
Name	Prof Nuria Castells Gómez
Country	 ES
Organisation	University of Barcelona



Your Bank Accounts

On this page you can register your banking details.
Please note that any reimbursement claims can be processed only after you complete your registration including full IBAN and SWIFT/BIC codes which you can obtain by contacting your bank.
To add a new bank account, please use the "Add new bank account" link below.
If you decide to register more than one bank account under your e-COST profile then the first bank account that you register will be set as primary. Any of the reimbursement payments will automatically be transferred to the bank account registered in your e-COST profile as primary. You can set any of your bank accounts as your primary account by choosing the respective menu option next to that bank account. Please note that there can only be one primary bank account.
Please note that your bank details will not be published and will ONLY be used for COST payment related purposes.

***Bank account cannot be deleted if they are associated to a Grant Holder
**Bank account will be validated only when the organisation is associated as a Grant holder to an Action. To select the action, please go to the [view organisation](#) page for the list of action.*

Add bank account

Please note that your bank details will not be published on the COST website and will ONLY be used for COST payment related purposes.
All fields marked with a star (*) are mandatory.
You will be able to edit or delete this information at any stage. Please note that an email reminder will be sent to you each time there is a recorded change in your banking information.

Any reimbursement claims can only be processed after you complete your registration including full IBAN and SWIFT/BIC codes.

BENEFICIARY DETAILS

Type of Account*

Institution's Email Address *

A copy of the payment-related email will also be sent to the Institution's email address.

Account Holder's Name*

Account holder's Address*

Address line 2

Address line 3

Account holder's Country*

EDIT BANK DETAILS

Bank Country*

Figure 20 Screens via which the GHLR encodes the GH institution bank account

The COST Financial Unit then validates the GH bank account via the screen below.

e-COST not live!

Home | Tasks | Profile | FAQ | Contact
Ms Teresa Oliveros Martinez Logged in as Select Profile... Log Out

Dashboard
MCI Decisions
Assign Candidates
Grant Holders
Grant Periods
« Action Overview

Validate Bank Account

ORGANISATION DETAILS

Organisation Name

Country

BANK DETAILS

Type of Account

Account holder's address

Receiving Bank Country

Bank Name

Receiving IBAN

Bank's Swift/BIC Code

Validate Bank?

Figure 21 Screen via which the COST Association Finance Team validates the GH institution bank account

3. Encode MC1 meeting date and Grant Period dates and allocated budget (Science Officer)

Triggered by either:

- (GP1) the acceptance of the MoU by at least 5 COST countries including the country of the Proposer, or
- (subsequent GPs) reaching the date 4 months from the end of the current Grant Period

The Science Officer (SO) receives an email with the request to encode:

- (all GPs) the dates and allocated budget for the Grant Period, and
- (GP1 only) the date for the first Management Committee meeting (MC1) – in the “COST Action Overview”.

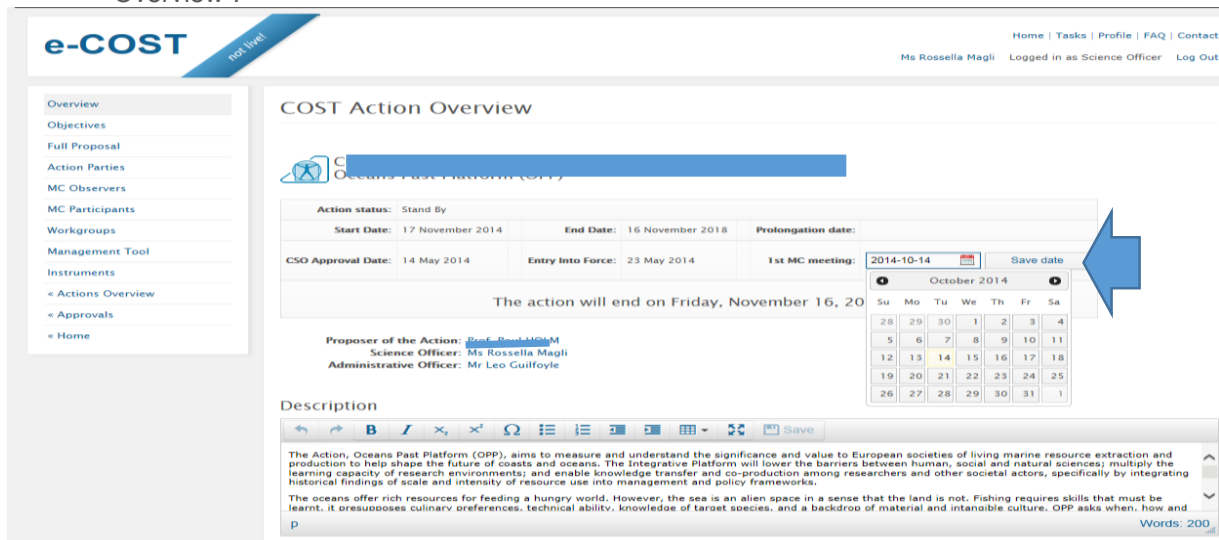
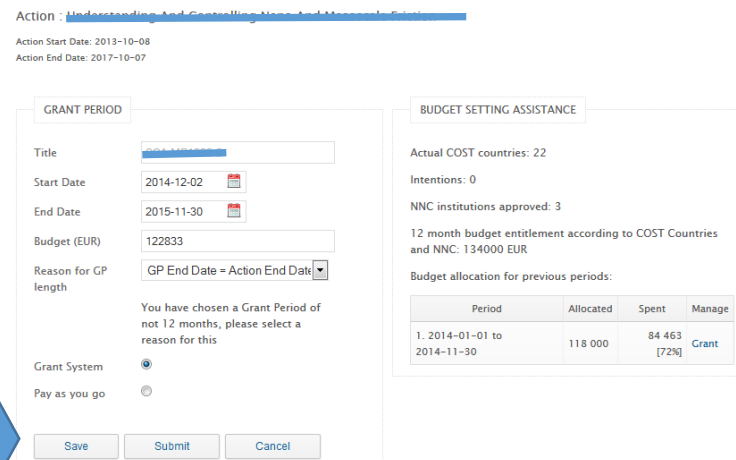


Figure 22 Setting the first Management Committee meeting (MCM1) date

The SO sets the Grant Period start and end dates and the budget amount by going to “Management Tool”, “Grant Periods”, “Add Grant Period”. e-COST makes automatic suggestions for the Grant Period dates and the allocated budget which can be overwritten by the SO. The SO must click “Submit” to submit the data to e-COST (be careful: clicking “Save” only saves the data, it does not submit it (for validation or communication to Action Chair)). After the SO clicks “Submit”, e-COST checks the allocated budget against the Action’s budget entitlement according to the Budget Entitlement Table and automatically requests any justification or validation (by Head of Science Operations, Finance and Head of Financial Control and Accounting) that is required.



Period	Allocated	Spent	Manage
1. 2014-01-01 to 2014-11-30	118 000	84 463 [72%]	Grant

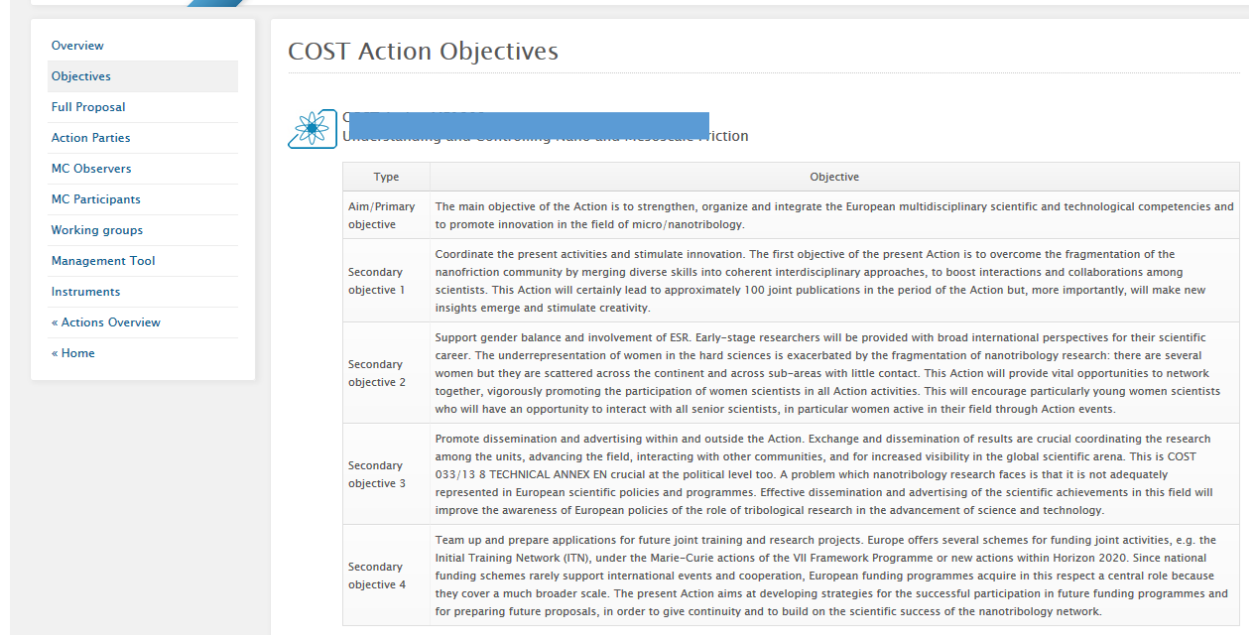
Figure 23 Setting the Grant Period start and end dates and allocated budget

4. Work & Budget Plan (WBP) drafting / revising, submission and approval (MC Chair/ COST Association/ MC)

4.1 Review MoU objectives, enter/ update WG Leader names and number of participants

4.1.1 Review MoU objectives

The first time that you use eCAMT you must log in to e-COST and navigate to “Objectives” on the left side menu by clicking first on “Tasks” (top right corner) and then on the code of the Action of which you are Chair. Review the MoU objectives that have been transferred to e-COST from the MoU of the Action and if you find that any errors have been introduced during the transfer process bring these to the attention of the SO of the Action by email.

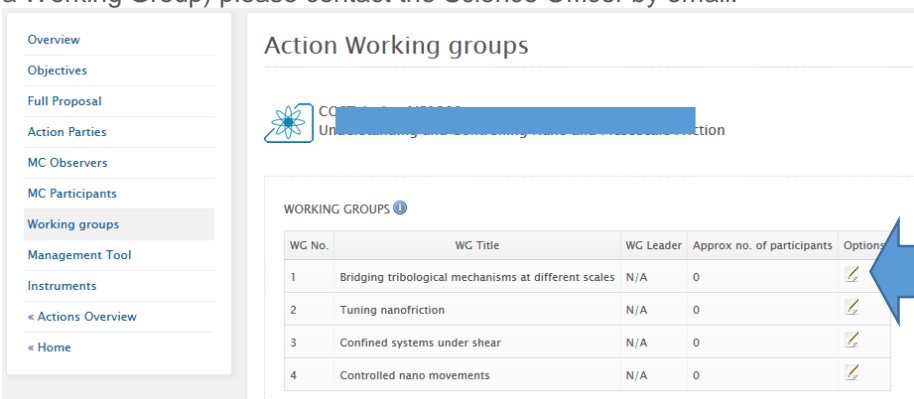


Type	Objective
Aim/Primary objective	The main objective of the Action is to strengthen, organize and integrate the European multidisciplinary scientific and technological competencies and to promote innovation in the field of micro/nanotribology.
Secondary objective 1	Coordinate the present activities and stimulate innovation. The first objective of the present Action is to overcome the fragmentation of the nanofriction community by merging diverse skills into coherent interdisciplinary approaches, to boost interactions and collaborations among scientists. This Action will certainly lead to approximately 100 joint publications in the period of the Action but, more importantly, will make new insights emerge and stimulate creativity.
Secondary objective 2	Support gender balance and involvement of ESR. Early-stage researchers will be provided with broad international perspectives for their scientific career. The underrepresentation of women in the hard sciences is exacerbated by the fragmentation of nanotribology research: there are several women but they are scattered across the continent and across sub-areas with little contact. This Action will provide vital opportunities to network together, vigorously promoting the participation of women scientists in all Action activities. This will encourage particularly young women scientists who will have an opportunity to interact with all senior scientists, in particular women active in their field through Action events.
Secondary objective 3	Promote dissemination and advertising within and outside the Action. Exchange and dissemination of results are crucial coordinating the research among the units, advancing the field, interacting with other communities, and for increased visibility in the global scientific arena. This is COST 033/13 8 TECHNICAL ANNEX EN crucial at the political level too. A problem which nanotribology research faces is that it is not adequately represented in European scientific policies and programmes. Effective dissemination and advertising of the scientific achievements in this field will improve the awareness of European policies of the role of tribological research in the advancement of science and technology.
Secondary objective 4	Team up and prepare applications for future joint training and research projects. Europe offers several schemes for funding joint activities, e.g. the Initial Training Network (ITN), under the Marie-Curie actions of the VII Framework Programme or new actions within Horizon 2020. Since national funding schemes rarely support international events and cooperation, European funding programmes acquire in this respect a central role because they cover a much broader scale. The present Action aims at developing strategies for the successful participation in future funding programmes and for preparing future proposals, in order to give continuity and to build on the scientific success of the nanotribology network.

Figure 24 Reviewing the Action MoU objectives

4.1.2 Enter/ update WG Leaders and number of participants per Working Group

Each year when the Chair prepares to draft the Work and Budget Plan they must log in to e-COST and navigate to “Working Groups” on the left hand menu. Click on the edit icon next to a Working Group and enter/ update the number of participants in that Working Group and the name of the Working Group Leader (by selecting from a list of MC Members). In case of any difficulties (eg not finding the name of the Leader of a Working Group) please contact the Science Officer by email.







WG No.	WG Title	WG Leader	Approx no. of participants	Options
1	Bridging tribological mechanisms at different scales	N/A	0	
2	Tuning nanofriction	N/A	0	
3	Confined systems under shear	N/A	0	
4	Controlled nano movements	N/A	0	

Figure 25 Entering/ updating WG Leader names and number of participants

4.2 Work & Budget Plan (WBP) drafting / revising and submission (Chair)

The MC Chair (or, prior to the first MC meeting, the MC Chair candidate) receives an automatic email with a hyperlink to draft (or revise) the Work and Budget Plan (WBP). The Work and Budget Plan has the following sections:

- Section I – Action Profile which contains prefilled information already stored on e-COST;
- Section II – Work Plan where the Chair must enter
 - Grant Period Goals and
 - Networking Tool usage (for each use of a Networking Tool (Meeting, Training School, STSM, Dissemination, OERSA) the Chair must enter (i) a description of the activity, (ii) the outputs of the activity and (iii) the logistical/ financial details of the activity;
- Section III – Budget Plan overview which
 - provides an automatic summary of the financial details entered in Section II, and
 - enables the Chair to enter the FSAC rate that the MC decided for the Grant Holder institution.

To:
Cc: valentina.vignoli@cost.eu, Rossella.Magli@cost.eu

===Original message follows===

Dear [MC Chair Candidate Name not available],

The COST Association has allocated a budget of 156000 EUR for COST Action for Grant Period 1 (2014-12-01 to 2015-11-30).

Please click on the link below to log into e-cost and follow the instructions to draft the Work and Budget Plan for this Grant Period. You will only be able to encode activities that occur during the Grant Period and are permitted under the COST rules.

<http://test.cost.eu/action/IS1404/1234/wbp/instructions>

e-COST will prompt you to enter a justification for any activities that require an exceptional approval from the COST Association or if the budget that you encode exceeds the allocated budget. These request and justifications will then be reviewed by the COST Association.

After the first Management Committee meeting the Work and Budget Plan will be revised by the person elected Chair by the Management Committee and submitted for review by the COST Association. Once approved by the COST Association it will be automatically sent for MC approval via the e-COST based MC online approval tool and the Grant Agreement documentation will be prepared.

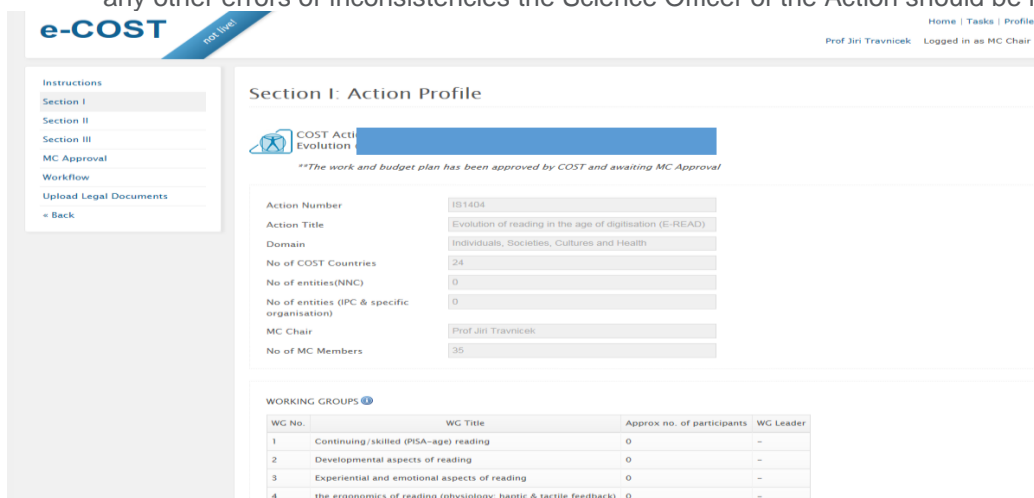
If you have any questions please contact the Science Officer for IS1404, Ms Rossella Magli (Rossella.Magli@cost.eu)

Best regards,

COST Association
Avenue Louise 149
1050 Brussels | Belgium
www.cost.eu

Figure 26 E-notification received by Action Chair with hyperlink via which the Work and Budget Plan must be prepared and submitted

4.2.1 The Chair should then review Section I (Action Profile). If the Working Group Leader names or number of participants need to be revised see Section 4.1 of this User Guide. If the Chair finds any other errors or inconsistencies the Science Officer of the Action should be informed.



e-COST not logged in

Home | Tasks | Profile | Prof Jiri Travnicek | Logged in as MC Chair

Section I: Action Profile

COST Action Evolution

***The work and budget plan has been approved by COST and awaiting MC Approval*

Action Number: IS1404
 Action Title: Evolution of reading in the age of digitalisation (E-READ)
 Domain: Individuals, Societies, Cultures and Health
 No of COST Countries: 24
 No of entities (NNC): 0
 No of entities (PC & specific organisation): 0
 MC Chair: Prof Jiri Travnicek
 No of MC Members: 35

WC No.	WC Title	Approx no. of participants	WC Leader
1	Continuing /skilled (PISA-age) reading	0	-
2	Developmental aspects of reading	0	-
3	Experiential and emotional aspects of reading	0	-
4	the ergonomics of reading (physiology, haptic & tactile feedback)	0	-

Figure 27 Work and Budget Plan Section I Action Profile

4.2.2 The Chair should then navigate to Section III and enter the FSAC % approved by the Management Committee for the Grant Holder institution (this will be verified by the COST Association). This will ensure that the budget summary in Section III takes the FSAC into account when calculating the Total Expenditure (which should not exceed the budget allocated by the COST Association).

4.2.3 The Chair must then enter the Grant Period Goals for the Grant Period. These are the goals whose achievement this Grant Period is necessary to ensure the achievement of the MoU objectives after four years.

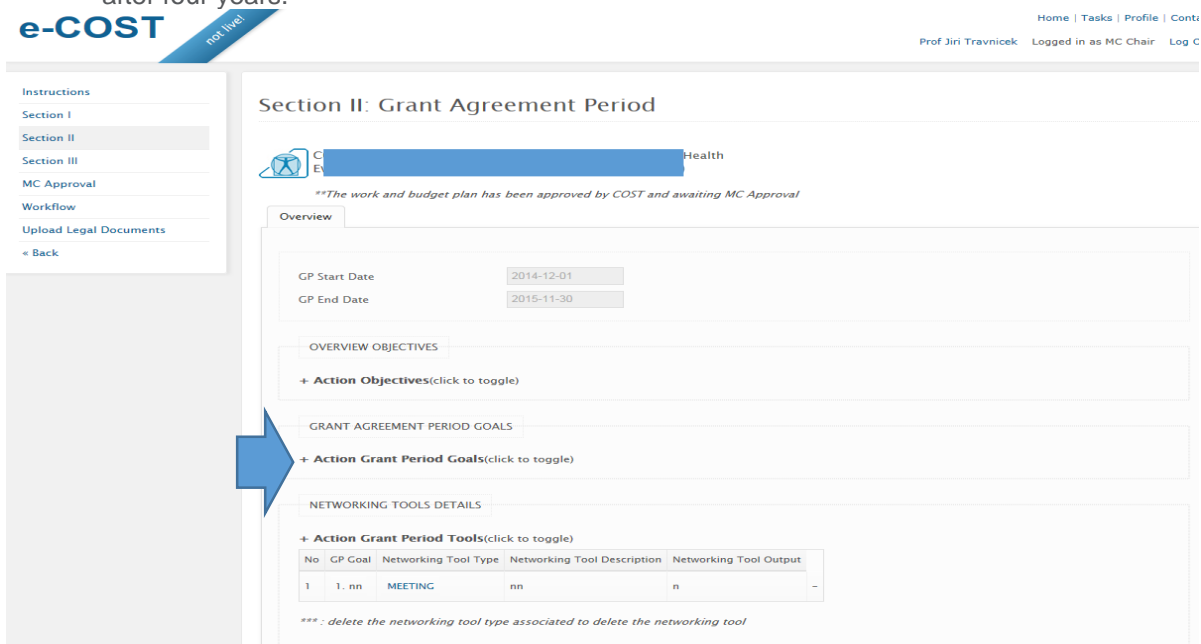


Figure 28 Work and Budget Plan Section II Drafting the Grant Period Goals

4.2.4 Once all the Grant Period Goals have been entered the Chair must then add the Networking Tools through which the Grant Period Goals will be achieved during the Grant Period. For each Networking Tool added the first screen requires the entry of the description of the activity and the output(s) of the activity.

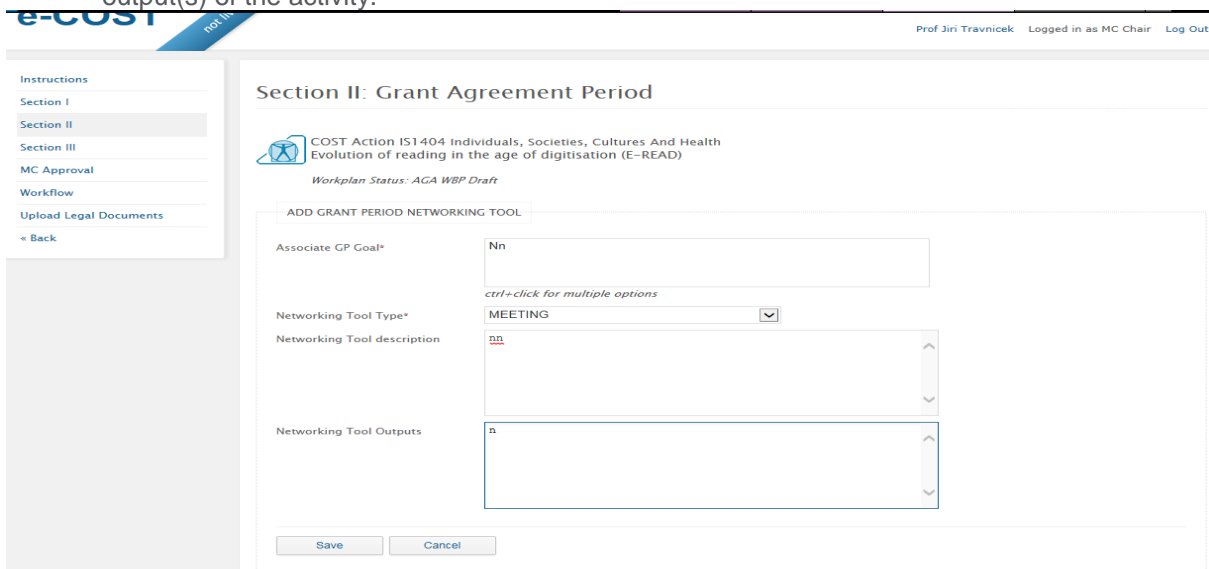
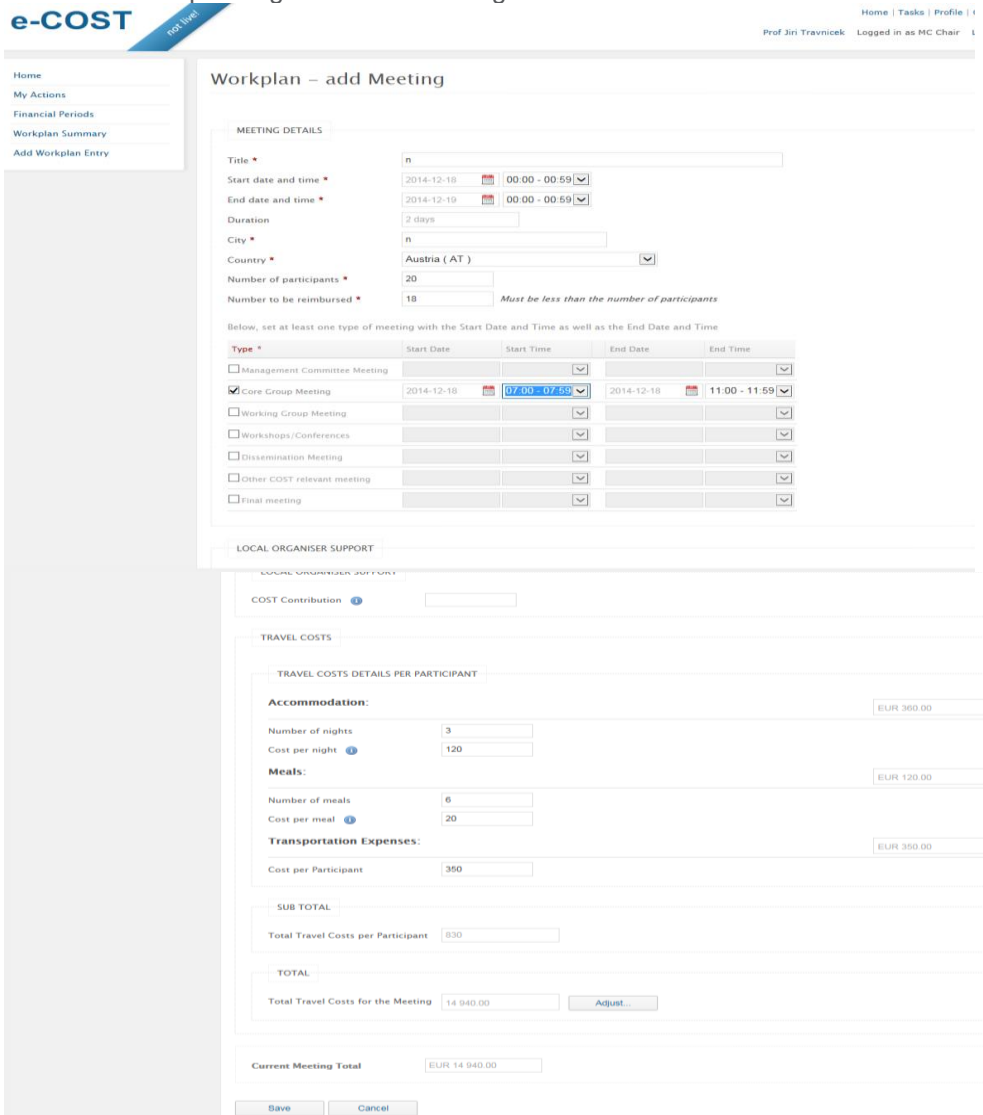


Figure 29 Networking Tool first data entry screen (same screen for all Networking Tools)

After the description and output(s) have been entered and the Chair has clicked “Save” a screen appears via which the logistical/ financial details of the networking Tool must be entered. This screen differs depending on the Networking Tool selected.



Workplan – add Meeting

MEETING DETAILS

Title * n

Start date and time * 2014-12-18 00:00 - 00:59

End date and time * 2014-12-19 00:00 - 00:59

Duration 2 days

City * n

Country * Austria (AT)

Number of participants * 20

Number to be reimbursed * 18 *Must be less than the number of participants*

Below, set at least one type of meeting with the Start Date and Time as well as the End Date and Time

Type *	Start Date	Start Time	End Date	End Time
<input type="checkbox"/> Management Committee Meeting				
<input checked="" type="checkbox"/> Core Group Meeting	2014-12-18	07:00 - 07:59	2014-12-18	11:00 - 11:59
<input type="checkbox"/> Working Group Meeting				
<input type="checkbox"/> Workshops/Conferences				
<input type="checkbox"/> Dissemination Meeting				
<input type="checkbox"/> Other COST relevant meeting				
<input type="checkbox"/> Final meeting				

LOCAL ORGANISER SUPPORT

COST Contribution 1

TRAVEL COSTS

TRAVEL COSTS DETAILS PER PARTICIPANT

Accommodation: EUR 360.00

Number of nights 3

Cost per night 120

Meals: EUR 120.00

Number of meals 6

Cost per meal 20

Transportation Expenses: EUR 350.00

Cost per Participant 350

SUB TOTAL

Total Travel Costs per Participant 830

TOTAL

Total Travel Costs for the Meeting 14 940.00

Current Meeting Total EUR 14 940.00

Figure 30 Networking Tool second data entry screen (different screen for each type of Networking Tool)

Three Networking Tools (Meetings, Training Schools and Dissemination) are entered by creating a new Networking Tool with associated description, output(s) and logistical/ financial details for each activity. However for STSMs one single “activity” is entered comprising all STSMs foreseen for that Grant Period. The descriptions entered in the activity description and activity output fields must encompass all the foreseen STSMs as must the budget detail (number of STSMs and cost).

4.2.5 While drafting the Work and Budget Plan in Section II the Chair can click at any time on Section III to see the overview of the budget entered to date. Section III Budget Plan overview which provides an automatic summary of the financial details entered in Section II. Each item expands when clicked. At the end of this section, MC Chair can submit the WBP to the COST Association for approval. Each of the Networking Tool types (eg “Meetings”) will expand if clicked.

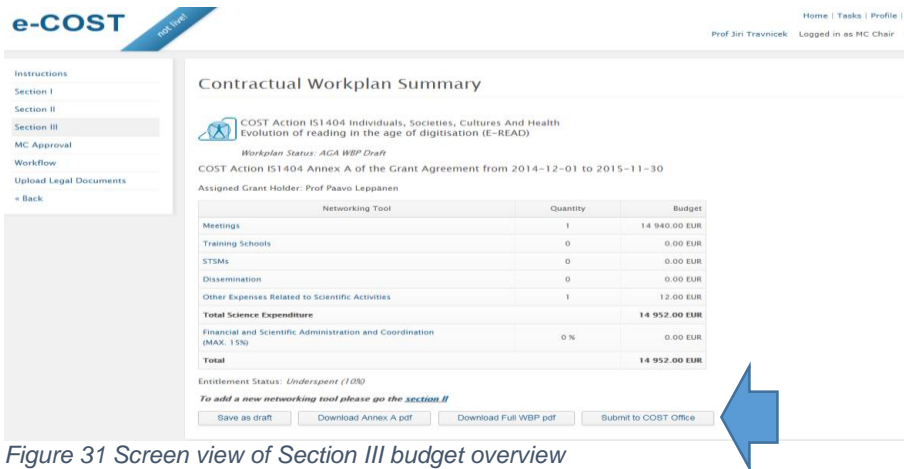


Figure 31 Screen view of Section III budget overview

4.2.6 The Chair can only **submit the Work and Budget Plan** by clicking on the “submit to COST” button after the first Management Committee Meeting and after the COST Association Administrative Officer has assigned, in e-COST the Grant Holder for the Grant Period (Section 2.4) which is not possible until the Grant Holder Financial Representative has accepted the GHFR role and confirmed that the institution will work within the COST rules (Section 2.2). Prior to submission the Chair will be required to enter a justification for any derogation requests contained in the Work and Budget Plan. Derogation requests should remain exceptional.

4.3 Work and Budget Plan approval (COST Association, MC Members)

4.3.1 When the WBP is submitted by the Chair the SO receives an email notification. The SO reviews the WBP and either:

- Returns it to the Chair for further revision along with an explanation of the revisions required, or
- Validates it.

If the WBP is returned to the Chair or if the SO validates a WBP containing a budget request in excess of the Action budget entitlement or request(s) for derogation(s) the SO must enter into e-COST the justification for the decision.

Training Schools	0	0.00 EUR
STSMs	0	0.00 EUR
Dissemination	0	0.00 EUR
Other Expenses Related to Scientific Activities	1	12.00 EUR
Total Science Expenditure		14 952.00 EUR
Financial and Scientific Administration and Coordination (MAX. 15%)	0%	0.00 EUR
Total		14 952.00 EUR

Entitlement Status: *Underspent (10%)*

* = in case of change of grant amount and/or period

MC Justification for requesting derogation

JUSTIFICATION

Encode justification :

Download Annex A pdf

Download Full WBP pdf

Approve

Reject

Figure 32 Screen on which the SO approves or does not approve the WBP submitted by Chair and enters justification for the decision (where required).

4.3.2 If the SO validated a WBP containing either (or both) a budget request other than the Action’s budget entitlement or a request(s) for derogation(s) to the COST rules then e-COST automatically sends the SO-validated WBP for validation by the Head of Science Operations (HoSO) and, depending on the situation Finance/ Head of Financial Control and Accounting (HoFCA). In each case the WBP can either be:

- returned for revision/ further explanation, or
- validated

Once all the necessary validations have been completed (the validations required depend on the budget requested and the presence of any requests for derogations from the COST rules) the WBP is deemed approved by COST (“COST approved”).

4.3.3 Once the WBP has been approved by the COST Association e-COST will automatically launch an online MC vote for approval of the WBP. The rules as described in COST 4114/13 “Action Management” apply to this vote. It will last for 7 days, all MC Members will be invited to vote, non-voting will be considered as approval. In case of a vote to not approve the Work and Budget Plan the MC Member casting that vote will be required to enter an explanation/ justification to assist the Chair in revising the Work and Budget Plan if it is not accepted by the Management Committee.

Dear MC Member of COST Action **IS1404**,

The Chair of **IS1404** has submitted the Work & Budget Plan for Grant Period 1 (2014-12-01 to 2015-11-30). This Work and Budget Plan has been accepted by the COST Association. The approval of the Management Committee is now needed so that the COST Office can sign the Grant Agreement with the Grant Holder.

Please click on the following link to cast your vote on the Work & Budget Plan

<http://test.cost.eu/action/IS1404/1234/wbp/approval>

In accordance with the COST rules:

1. absence of casting a vote will be considered a vote to accept the Work and Budget Plan,
2. the vote starts now and will remain open for 7 days (until 2014-10-24 at 15:20)
3. conflicting votes cast by MC Members representing the same country will be constitute an invalid vote unless the conflict is resolved before the end of the voting period.

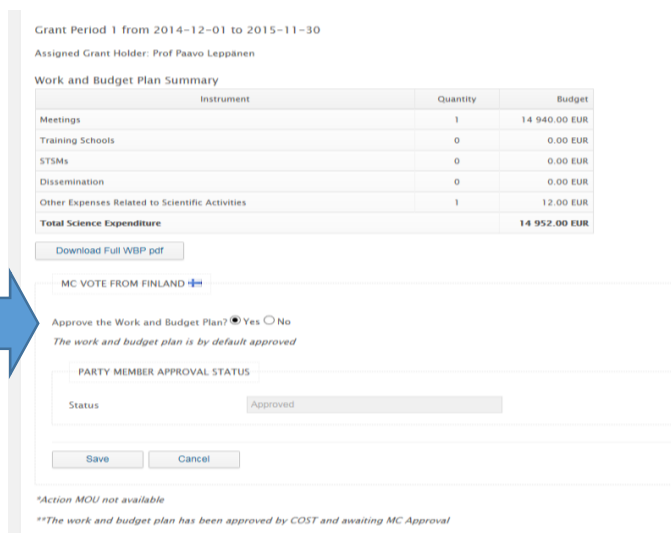
After the end of the voting period the outcome of the vote (approval/ non approval of the Work and Budget Plan) and the implications thereof (signing of a Grant Agreement/ revision by the Action Chair) will be communicated by email.

Best regards,

COST Association
Avenue Louise 149
1050 Brussels | Belgium
www.cost.eu

Ref: E-35

Figure 33 Email received by MC Members inviting them to review the WBP submitted by Chair and approved by COST Association and vote whether or not to approve it



Grant Period 1 from 2014-12-01 to 2015-11-30
Assigned Grant Holder: Prof Paavo Leppänen

Work and Budget Plan Summary

Instrument	Quantity	Budget
Meetings	1	14 940.00 EUR
Training Schools	0	0.00 EUR
STSMs	0	0.00 EUR
Dissemination	0	0.00 EUR
Other Expenses Related to Scientific Activities	1	12.00 EUR
Total Science Expenditure		14 952.00 EUR

Download Full WBP.pdf

MC VOTE FROM FINLAND

Approve the Work and Budget Plan? Yes No
The work and budget plan is by default approved

PARTY MEMBER APPROVAL STATUS

Status: Approved

Save Cancel

*Action MOU not available
**The work and budget plan has been approved by COST and awaiting MC Approval

Figure 34 The screen MC Members see after clicking on the hyperlink in the email inviting them to vote on whether to approve the WBP submitted by the Chair and approved by the COST Association

4.3.4 At the end of the (seven day) voting period the outcome of the MC vote is communicated to the MC (see email below)

The result of the MC online vote regarding the approval of the **IS1404** Work and Budget Plan for GP 1 (2014-12-01 to 2015-11-30) is: Approved.

The Voting Status can be viewed by following the link below:

<http://test.cost.eu/action/IS1404/1234/wbp/approval>

The COST Association will now sign a Grant Agreement with the Grant Holder on this basis.

Best regards,

COST Association
Avenue Louise 149
1050 Brussels | Belgium
www.cost.eu

Ref: E-36.A

Figure 35 Email received by MC Members informing them of the outcome of the MC vote regarding the WBP submitted by the Chair and approved by the COST Association

and if the WBP is:

- Not approved by the Management Committee the Chair will receive an automatic email stating that the WBP must be revised (as per Sections 4.2.3 to 0 and providing a hyperlink to read the comments made by the countries that voted to not approve the WBP to assist in the revision, after revision the Chair must resubmit the WBP (as per Section 4.2.6),
- Approved by the Management Committee the COST Association Administrative Officer will receive an automatic notification to generate and check the Action Grant Agreement (AGA) and Annex A as described in Section 5.

5. Generation and (electronic) signing of Action Grant Agreement (AGA) and Annex A (AO, GHLR, COST Director)

5.1 Setting instalment percentages (AO)

After being notified (e-notification) that the Work and Budget Plan is approved by the COST Association and by the Management Committee, the AO validates or modifies the instalments percentages.

To: valentina.vignoli@cost.eu

===Original message follows===

Dear Ms Valentina Vignoli

The Grant Period 1 (2014-12-01 to 2015-11-30) Work and Budget Plan has now been approved by the COST Association and the COST Action **IS1404** Management Committee.

Please follow the link below to generate the Grant Agreement and Annex A.

<http://test.cost.eu/action/IS1404/1234/wbp/step3>

In case you find any errors in these documents, please resolve them before proceeding. Otherwise please click the button necessary to release the two documents to COST Finance for a final check.

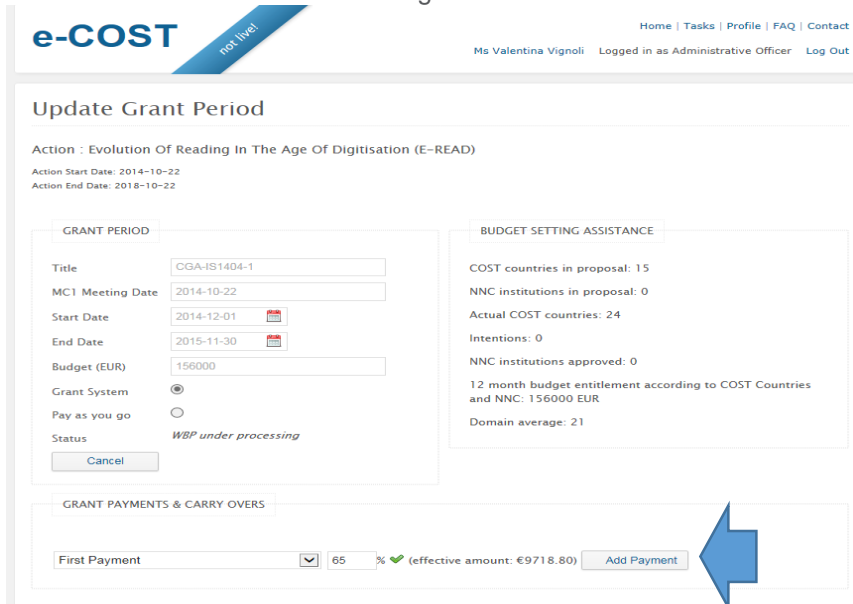
Best regards, eCost.

Ref: E-43

Figure 36 E-notification that COST Association AO receives when Work and Budget Plan is approved by Management Committee and AGA should be prepared

By default the values are prefilled with:

- First Instalment Percentage: 65%
- Second Instalment Percentage: 35%
- Third Instalment Percentage: 0%



The screenshot shows the 'Update Grant Period' interface in the e-COST system. The page header includes the e-COST logo and navigation links. The main content area displays the details for the 'Evolution Of Reading In The Age Of Digitisation (E-READ)' action, including start and end dates. Below this, there are two main sections: 'GRANT PERIOD' and 'BUDGET SETTING ASSISTANCE'. The 'GRANT PERIOD' section contains input fields for Title (CGA-IS1404-1), MC1 Meeting Date (2014-10-22), Start Date (2014-12-01), End Date (2015-11-30), Budget (EUR) (156000), Grant System (radio buttons), and Pay as you go (radio buttons). The 'BUDGET SETTING ASSISTANCE' section provides summary statistics: COST countries in proposal (15), NNC institutions in proposal (0), Actual COST countries (24), Intentions (0), NNC institutions approved (0), 12 month budget entitlement (156000 EUR), and Domain average (21). At the bottom, the 'GRANT PAYMENTS & CARRY OVERS' section shows a dropdown menu for 'First Payment' set to 65%, with an 'Add Payment' button highlighted by a blue arrow.

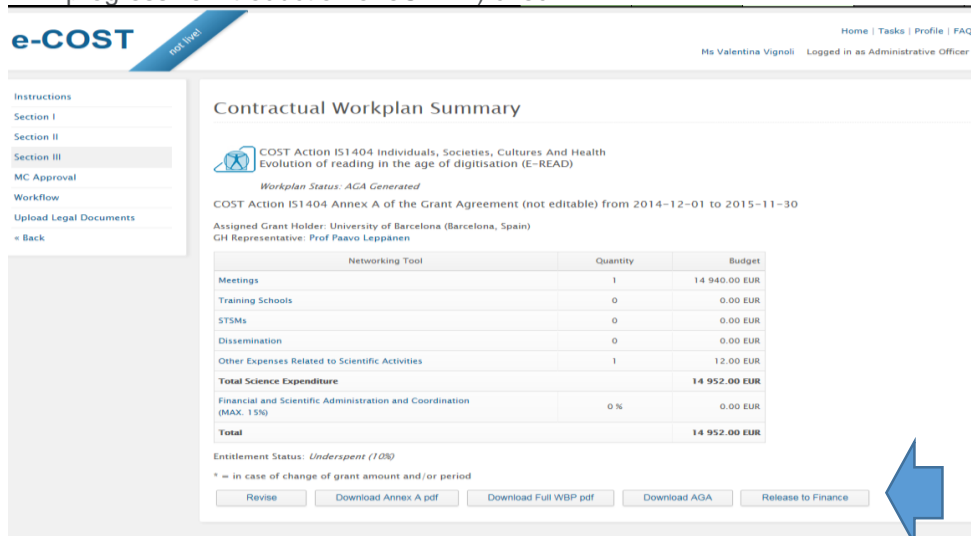
Figure 37 Screen via which the AO validates/ modifies the installments percentages

5.2 Generating and checking AGA and Annex A (AO and COST Finance)

After setting the instalment percentages the AO generates the Action Grant Agreement (AGA) and Annex A and checks them, in particular to ensure that no (special) character translation errors have occurred in names of people or institutions:

- If errors are found the AO should revise/ seek the assistance of IT Helpdesk,

- If there are no errors the AO releases the document to finance for a final (temporary during progressive introduction of eCAMT) check.



e-COST not tested! Home | Tasks | Profile | FAQ | Ms Valentina Vignoli | Logged in as Administrative Officer

Contractual Workplan Summary

COST ACTION IS1404 Individuals, Societies, Cultures And Health
Evolution of reading in the age of digitisation (E-READ)

Workplan Status: AGA Generated

COST ACTION IS1404 Annex A of the Grant Agreement (not editable) from 2014-12-01 to 2015-11-30

Assigned Grant Holder: University of Barcelona (Barcelona, Spain)
GH Representative: Prof Paavo Leppänen

Networking Tool	Quantity	Budget
Meetings	1	14 940.00 EUR
Training Schools	0	0.00 EUR
STSMs	0	0.00 EUR
Dissemination	0	0.00 EUR
Other Expenses Related to Scientific Activities	1	12.00 EUR
Total Science Expenditure		14 952.00 EUR
Financial and Scientific Administration and Coordination (MAX. 15%)	0 %	0.00 EUR
Total		14 952.00 EUR

Entitlement Status: *Underspent (10%)*

* = in case of change of grant amount and/or period

Figure 38 Screen via which the AO reviews the AGA and Annex A and releases it to COST Finance

The COST Finance Team receives an e-notification to check and validate the AGA and Annex A.

to: finance@cost.eu
Cc: valentina.vignoli@cost.eu

===Original message follows===

Dear COST Finance Team,

The **IS1404** Grant Period 1 (2014-12-01 to 2015-11-30) Grant Agreement documentation (AGA and Annex A) has been checked and released to you by the AO and now requires validation by Finance.

Please check and validate the documentation as soon as possible by clicking the link below :

<http://test.cost.eu/action/IS1404/1234/wbp/step3>

Upon validation it will be automatically sent to the Grant Holder Legal representative for e-signing, then to the COST Association Director for e-signing and then to Accounting for payment. If you find any errors the AO should be informed to correct the errors and re-generate the documentation.

For any questions please contact the Action Administrative Officer: Ms Valentina Vignoli, valentina.vignoli@cost.eu.

Best regards, eCOST.

Ref: E-44

Figure 39 E-notification via which COST Finance Team is requested to review the AGA and Annex A and release to the Grant Holder Legal Representative for electronic signature

After checking the document the COST Finance Team either:

- Returns to the AO if errors are found, or
- Releases the AGA and Annex A to the GHLR for signature using Strong Authentication.

Workflow

Upload Legal Documents

+ Back

Workplan Status: AGA checked and released by AO

COST Action IS1404 Annex A of the Grant Agreement (not editable) from 2014-12-01 to 2015-11-30

Assigned Grant Holder: University of Barcelona (Barcelona, Spain)

GH Representative: Prof Paevo Leppänen

Networking Tool	Quantity	Budget
Meetings	1	14 940.00 EUR
Training Schools	0	0.00 EUR
STSMs	0	0.00 EUR
Dissemination	0	0.00 EUR
Other Expenses Related to Scientific Activities	1	12.00 EUR
Total Science Expenditure		14 952.00 EUR
Financial and Scientific Administration and Coordination (MAX. 15%)	0 %	0.00 EUR
Total		14 952.00 EUR

Entitlement Status: *Underspent (100)*

* = in case of change of grant amount and/or period

MC Justification for requesting derogation

Download Annex A.pdf Download Full WBP.pdf Download AGA Re-release to Finance Return to AO Validate




Figure 40 Screen via which the COST Finance Team reviews the AGA and Annex A and either return to AO or release to GHLR

5.3 Grant Holder (electronically) signs the Action Grant Agreement (AGA) and Annex A and Grant Period activated (Grant Holder Legal Representative (GHLR))

The Grant Holder Legal Representative receives an e-notification to sign the AGA and Annex A electronically in e-COST using Strong Authentication. Before being able to e-sign, the GH LR needs to create a Strong Authentication user profile.

Dear Grant Holder Legal Representative for **IS1404**,

The **IS1404** Grant Agreement documentation (Grant Agreement and Annex A) for Grant Period 1 (2014-12-01 to 2015-11-30) is available for signing in the Grant Holder Legal Representative e-COST profile, follow the link below:

<http://test.cost.eu/action/IS1404/1234/wbp/step3>

Please e-sign the documentation at your earliest convenience which will automatically activate the Grant Period in e-COST and will return the e-signed documents to the COST Association via e-COST.

You will be notified once the documentation has been e-signed by the COST Association Director.

Please refer to the Administrative Officer of **IS1404**, Ms Valentina Vignoli, valentina.vignoli@cost.eu if you have any questions.

Best regards,

COST Association
Avenue Louise 149
1050 Brussels | Belgium
www.cost.eu

Ref: E-46

Figure 41 E-notification received by GH Legal Representative the with hyperlink via which they can electronically sign the Action Grant Agreement and Annex A using Strong Authentication

Instructions

Section I

Section II

Section III

MC Approval

Workflow

Upload Legal Documents

« Back

Contractual Workplan Summary

COST Action IS1404 Individuals, Societies, Cultures And Health
Evolution of reading in the age of digitisation (E-READ)

Workplan Status: AGA approved COST

COST Action IS1404 Annex A of the Grant Agreement (not editable) from 2014-12-01 to 2015-11-30

Assigned Grant Holder: University of Barcelona (Barcelona, Spain)
GH Representative: Prof Paavo Leppänen

Networking Tool	Quantity	Budget
Meetings	1	14 940.00 EUR
Training Schools	0	0.00 EUR
STSMs	0	0.00 EUR
Dissemination	0	0.00 EUR
Other Expenses Related to Scientific Activities	1	12.00 EUR
Total Science Expenditure		14 952.00 EUR
Financial and Scientific Administration and Coordination (MAX. 15%)	0 %	0.00 EUR
Total		14 952.00 EUR

Entitlement Status: *Underspent (10%)*

* = in case of change of grant amount and/or period

[Download Annex A pdf](#)
 [Download Full WBP pdf](#)
 [Download AGA](#)

The Grant Agreement is pending e-signing by the Grant Holder Legal Representative

[e-Sign AGA](#)

not live!

[Home](#) | [Tasks](#) | [Profile](#) | [FAQ](#) | [Contact](#)
 Dr Matt Hayler Logged in as Registered User [Log Out](#)

inWebo Secure Authentication

Connect as **Matt Hayler**

Your antiphishing seal: yes yes

Password: [I forgot my password](#)

Helium by inWebo © 2014

If your user profile is not listed above, activate this browser

Figure 42 Screens via which the GH Legal Representative electronically signs the AGA and Annex A using Strong Authentication

Once the Grant Holder Legal Representative has electronically signed the Action Grant Agreement and Annex A in e-COST using Strong Authentication:

- the Grant Period is automatically activated and the GHSR and GHM/AR informed by e-notification. This means that the Grant Holder can immediately start to send official e-COST invitations and approvals, and
- the COST Association Director receives an e-notification to electronically sign the Action Grant Agreement and Annex A in e-COST using Strong Authentication.

5.4 COST Association (electronically) signs the Action Grant Agreement (AGA) and Annex A (COST Association Administration Director)

After being notified (e-notification) the COST Director e-signs (using Strong Authentication) the AGA and Annex A.

Dear Dr Monica Dietl,

The Grant Agreement documentation (Grant Agreement and Annex A) for the following Action and Grant Period has been validated by Finance and e-signed by the Grant Holder and is now available for you to e-sign: **IS1404** Grant Period 1 (2014-12-01 to 2015-11-30).

Please click here the link below to e-sign the documentation at your earliest convenience.

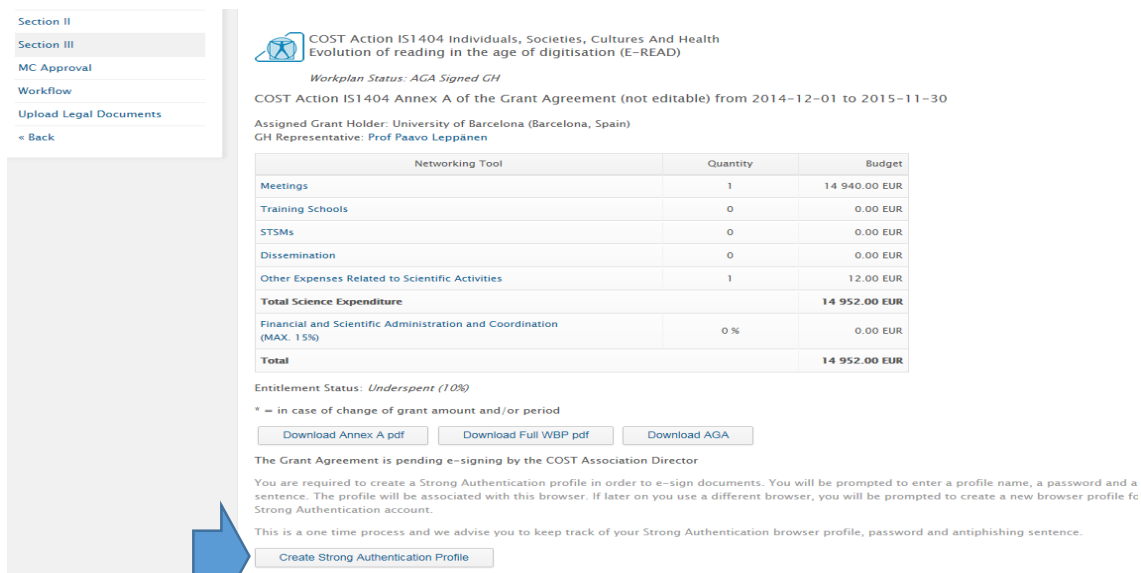
<http://test.cost.eu/action/IS1404/1234/wbp/step3>

For any questions please contact the Action SO Ms Rossella Magli or the Action AO Ms Valentina Vignoli.


Best regards, eCost.

Ref: E-48

Figure 43 E-notification received by the COST Association Director via which they can electronically sign the AGA and Annex A using Strong Authentication



Section II
Section III
MC Approval
Workflow
Upload Legal Documents
← Back

 COST Action IS1404 Individuals, Societies, Cultures And Health Evolution of reading in the age of digitisation (E-READ)
Workplan Status: AGA Signed GH

COST Action IS1404 Annex A of the Grant Agreement (not editable) from 2014-12-01 to 2015-11-30
Assigned Grant Holder: University of Barcelona (Barcelona, Spain)
GH Representative: Prof Paavo Leppänen

Networking Tool	Quantity	Budget
Meetings	1	14 940.00 EUR
Training Schools	0	0.00 EUR
STSMs	0	0.00 EUR
Dissemination	0	0.00 EUR
Other Expenses Related to Scientific Activities	1	12.00 EUR
Total Science Expenditure		14 952.00 EUR
Financial and Scientific Administration and Coordination (MAX. 1.5%)	0 %	0.00 EUR
Total		14 952.00 EUR

Entitlement Status: Underspent (10%)
* = in case of change of grant amount and/or period

The Grant Agreement is pending e-signing by the COST Association Director

You are required to create a Strong Authentication profile in order to e-sign documents. You will be prompted to enter a profile name, a password and a sentence. The profile will be associated with this browser. If later on you use a different browser, you will be prompted to create a new browser profile for Strong Authentication account.

This is a one time process and we advise you to keep track of your Strong Authentication browser profile, password and antiphishing sentence.

Figure 44 Screen via which the COST Association Director creates a Strong Authentication profile in order to electronically sign the AGA and Annex A

Activate inWebo authentication service

Site: test.cost.eu Browser: IE on Windows

This site is protected by inWebo authentication service. Please activate it in this browser.

User profile and browser

User profile *:

Monica Dietl E.g.: your name, your initials

Your user profile associated to this browser:

Monica Dietl - IE on Windows

Your user profile is automatically inserted

Authentication data

Password *:

7 to 16 characters, with at least one digit and one letter

Confirm password *:

Antiphishing seal *:

This secret sentence will be displayed each time you connect, asserting you are on the right web site

Email address:

monica.dietl@cost.eu

Activate inWebo

Helium by inWebo © 2014

Activate inWebo authentication service

Activation of inWebo service successful

inWebo, your authentication service, has been successfully activated for test.cost.eu. An authentication device, inWebo Helium, is configured in this browser.

A confirmation email has been sent to monica.dietl@cost.eu.

Check my list of secured sites, accessible using inWebo Helium

OK

Helium by inWebo © 2014

Figure 45 Screens via which the COST Association uses Strong Authentication to electronically sign the AGA and Annex A

5.5 Payment of the first instalment

The payment of the first instalment is made once:

- the Action Grant Agreement and Annex A has been electronically signed in e-COST using Strong Authentication by the COST Association Director, and
- for Grant Periods other than the first GP, any other requirements (for example the validation and signature of the yearly Financial Report for any preceding Grant Period) have been fulfilled.

Annex I Roles and Acronyms

Roles

COST Association

- Science Officer (SO)
- Administrative Officer (AO)
- Finance Team
- Legal Officer
- Head of Financial Control and Accounting (HoFCA)
- Head of Science Operations (HoSO)

Action

- Proposer
- MC Chair Candidate
- MC Chair
- MC Vice-Chair

Grant Holder

- Grant Holder institution candidate
- Grant Holder institution
- Grant Holder Scientific Representative (GHSR) - this is the MC Member affiliated with the Grant Holder and represents this institution within the MC.
- Grant Holder Financial Representative (GHFR) - the person from the Grant Holder Institution who has the legal authority to financially commit the institution in question and to approve and sign off on financial reports.
- Grant Holder Legal Representative (GHLR) - the person within the institution who bears legal authority to sign the COST Grant Agreement (e.g. the Rector of a University).
- GH Management/Administration Representative (GHM/AR) - this is the person affiliated with the Grant Holder in charge of the administrative management of the COST Action.

Acronyms

AGA: Action Grant Agreement

AO: Administrative Officer

CNC: COST National Coordinator

COST: European Cooperation in Science and Technology

CSO: Committee of Senior Officials

GH: Grant Holder

GHFR: Grant Holder Financial Representative

GHLR: Grant Holder Legal Representative

GHSR: Grant Holder Scientific Representative

GHM/AR: Grant Holder Management/Administration Representative

MC: Management Committee

SO: Science Officer

WBP: Work & Budget Plan

For more information please consult the Vademecum at www.cost.eu/Vademecum.