Preparing FP7 EU Proposals and Reports in LaTeX with `euproposal.cls`

Michael Kohlhase
Computer Science, Jacobs University Bremen
http://kwarc.info/kohlhase

April 15, 2016

Abstract

The `euproposal` class supports many of the specific elements of a Framework 7 Proposal. It is optimized towards collaborative projects. The package comes with an extensive example (a fake EU proposal) that shows all elements in action.

Contents

1 Introduction

Writing grant proposals is a collaborative effort that requires the integration of contributions from many individuals. The use of an ASCII-based format like LaTeX allows to coordinate the process via a source code control system like Subversion, allowing the proposal writing team to concentrate on the contents rather than the mechanics of wrangling with text fragments and revisions.

The `euproposal` class extends the `proposal` class [Koh15a] and supports many of the specific elements of Part B of a Framework 7 Proposal. The package documentation is still preliminary, fragmented and incomplete and only dwells on the particulars of DFG proposals, so we treat [Koh15a] as a prerequisite. Please consult the example proposal `propB.tex`, which comes with the package and shows the usage of the class in action. It is intended as a template for your proposal, but please bear in mind that the EU guidelines may change from call to call, if in doubt, please consult the FP7 guide for proposers.[1] EdN:1

The `eureporting` class supports most of the specific elements of the project reports to the EC. The example report `dfg/report.tex` is intended as a template for your final report[2]. EdN:2

The `euproposal` and `eureporting` classes and the `eupdata` package are distributed under the terms of the LaTeX Project Public License from CTAN archives in directory macros/latex/base/lppl.txt. Either version 1.0 or, at your option, any later version. The CTAN archive always contains the latest stable version, the development version can be found at https://github.com/KWARC/LaTeX-proposal. For bug reports please use the sTeX TRAC at https://github.com/KWARC/LaTeX-proposal/issues.

2 The User Interface

In this section we will describe the functionality offered by the `euproposal` class along the lines of the macros and environments the class provides. Much of the functionality can better be understood by studying the functional example `proposal.tex` (and its dependents) that comes with the `euproposal` package in conjunction with the proposer's EU proposer's guidelines (we have included it as `***` for convenience into the package distribution).[3] EdN:3

2.1 Package Options

As usual in LaTeX, the package is loaded by `\documentclass[`⟨*options*⟩`]{euproposal}`, where `[`⟨*options*⟩`]` is optional and gives a comma separated list of options specified in [Koh15a]. Some versions EU proposals want non-standard numbering schemes (e.g. starting with **B...** since we are writing Part B.), this can be reached by giving the `propB` option.

2.2 Proposal Metadata and Title page

The metadata of the proposal is specified in the `proposal` environment, which also generates the title page and the first section of the proposal as well as the last pages of the proposal with the signatures, enclosures, and references. The `proposal` environment should contain all the mandatory parts of the proposal text. The `proposal` environment uses the following EU-specific keys to specify metadata. `proposal`

- `callname` specifies the call the proposal addresses. It is usually a string of the form `ICT Call 1`, `callid` is the corresponding identifier, usually a string of the form `FP7-???-200?-?`. An overview over open calls can be found at http://cordis.europa.eu/fp7/dc/index.cfm `callname` `callid`
- The `challenge`, `objective`, and `outcome` keys specifies the specific parts in the call this proposal addresses. These are specified in the "call fiche" that can be obtained from the URL above. All of these have an identifier, which can be specified via the `challengeid`, `challenge` `objective` `outcome` `challengeid`

[1] EdNote: say something about the proposers guide.
[2] EdNote: say something about reporting
[3] EdNote: MK@MK do that and talk about reporting as well.

objectiveid
outcomeid
EdN:4
topicsaddressed
coordinator
coordinatorsite
iconrowheight

objectiveid, and outcomeid keys.[4]

- topicsaddressed allows to enter free-form text instead of specifying the challenge*, objective*, and outcome* keys.
- The coordinator key gives the identifier of the proposal coordinator. The euproposal package uses the workaddress package for representation of personal metadata, see [Koh15b] for details.
- The coordinatorsite key gives the identifier of the coordinating site (for the table).
- If given, the iconrowheight key instructs the euproposal class to make a line with the logos of the participants at the bottom of the title page, and specify their heights; 1.5cm is often a good value.

2.3 Work Packages and Work Areas

type

The type key specifies the activity type of the work package: RTD = Research and technological development (including any activities to prepare for the dissemination and/or exploitation of project results, and coordination activities); DEM = Demonstration; MGT = Management of the consortium; OTHER = Other specific activities, if applicable in this call.

2.4 Milestones and Deliverables

verif
\milestone
\milestonetable
caption
wname
wdeliv
wverif

euproposal.cls adds the verif key to for specifying a means of verification that the milestone has been successful.

With this, we can generate the milestone table that is required in many EU proposals. This can simply be done via the \milestonetable macro. It takes a keyword argument with the keys caption for specifying a different caption, and the widths wname, wdeliv, and wverif that can be used to specify different widths for the name/deliverables/verification columns in the milestone table.

2.5 Risks

In some EU proposals (e.g. FET), we need to identify risks and contingency and specify mitigation plans for them. In the euproposal we use two environments to mark them up.

risk
riskcont
BNP:5

\begin{risk}{⟨title⟩}{⟨prob⟩}{⟨grav⟩}...\end{risk} makes a paragraph no a risk ⟨title⟩ with gravity ⟨grav⟩ and probability ⟨prob⟩, where the body of the environment contains a description of the risk. The riskcont is a variant, where ⟨title⟩ names a risk and the body is a description of the contingency plan.

2.6 Reporting Infrastructure

report
key
ENP:5

The eureporting class gives an infrastructure for writing final reports of completed projects (see the file finalreport.tex in the package distribution). The report environment has functionality analogous to the proposal environment. It takes the same metadata keys — making it easy to generate by copy/paste from the proposal — but adds the keys key can be used to specify the reference key (something like KO 2428 47-11) given to the project by EU. Note that in the case of multiple proposers, you can use multiple instances of key to specify more than one reference key.

3 Limitations and Enhancements

The euproposal is relatively early in its development, and many enhancements are conceivable. We will list them here.

[4] EdNote: MK@MK: the outcomeid should key should be a list key, I am not implementing this right now, since it comes more natural when we change the class to metakeys support.

[5] New Part: MK@MK: This is new, and only partially implemented

1. none reported yet.

If you have other enhancements to propose or feel you can alleviate some limitation, please feel free to contact the author.

4 The Implementation

In this section we describe the implementation of the functionality of the `euproposal` and `eureporting` classes and the `eupdata` package.

4.1 Package Options and Format Initialization

We first set up the options for the package.

```
⟨*cls⟩
\newif\ifpartB\partBfalse
\DeclareOption{partB}{\partBtrue}
\DeclareOption*{\PassOptionsToClass{\CurrentOption}{proposal}}
⟨/cls⟩
⟨reporting⟩\DeclareOption*{\PassOptionsToClass{\CurrentOption}{reporting}}
⟨cls | reporting⟩\ProcessOptions
```

Then we load the packages we make use of

```
⟨cls⟩\ifpartB\LoadClass[report,noRAM]{proposal}\else\LoadClass[noRAM]{proposal}\fi
⟨reporting⟩\LoadClass[report,noRAM]{reporting}
⟨*cls | reporting⟩
\RequirePackage{longtable}
\RequirePackage{eurosym}
\RequirePackage{wrapfig}
\RequirePackage{eupdata}
```

we want to change the numbering of figures and tables

```
\RequirePackage{chngcntr}
\counterwithin{figure}{subsection}
\counterwithin{table}{subsection}
⟨/cls | reporting⟩
```

4.2 Proposal Metadata and Title Page

We extend the metadata keys from the `proposal` class.

```
⟨*pdata⟩
\define@key{prop@gen}{coordinator}{\def\prop@gen@coordinator{#1}\pdata@def{prop}{gen}{coordinator}{#1}}
\define@key{prop@gen}{coordinatorsite}{\def\prop@gen@coordinatorsite{#1}\pdata@def{prop}{gen}{coordinator}{#1
\def\prop@gen@challenge{??}\def\prop@gen@challengeid{??}
\define@key{prop@gen}{challenge}{\def\prop@gen@challenge{#1}\pdata@def{prop}{gen}{challenge}{#1}}
\define@key{prop@gen}{challengeid}{\def\prop@gen@challengeid{#1}\pdata@def{prop}{gen}{challengeid}{#1}}
\def\prop@gen@objective{??}\def\prop@gen@objectiveid{??}
\define@key{prop@gen}{objective}{\def\prop@gen@objective{#1}\pdata@def{prop}{gen}{objective}{#1}}
\define@key{prop@gen}{objectiveid}{\def\prop@gen@objectiveid{#1}\pdata@def{prop}{gen}{objectiveid}{#1}}
\def\prop@gen@outcome{??}\def\prop@gen@outcomeid{??}
\define@key{prop@gen}{outcome}{\def\prop@gen@outcome{#1}\pdata@def{prop}{gen}{outcome}{#1}}
\define@key{prop@gen}{outcomeid}{\def\prop@gen@outcomeid{#1}\pdata@def{prop}{gen}{outcomeid}{#1}}
\define@key{prop@gen}{callname}{\def\prop@gen@call{#1}\pdata@def{prop}{gen}{callname}{#1}}
\define@key{prop@gen}{callid}{\def\prop@gen@call{#1}\pdata@def{prop}{gen}{callid}{#1}}
\define@key{prop@gen}{iconrowheight}{\def\prop@gen@iconrowheight{#1}}
\define@key{prop@gen}{topicsaddressed}{\def\prop@gen@topicsaddressed{#1}}
⟨/pdata⟩
```

and now the ones for the final report

```
⟨*reporting⟩
\define@key{prop@gen}{reportperiod}{\def\prop@gen@reportperiod{#1}}
\define@key{prop@gen}{key}{\@dmp{key=#1}%
\@ifundefined{prop@gen@keys}{\xdef\prop@gen@keys{#1}}{\xdef\prop@gen@keys{\prop@gen@keys,#1}}}
\define@key{prop@gen}{projpapers}{\def\prop@gen@projpapers{#1}}
⟨/reporting⟩
```

and the default values, these will be used, if the author does not specify something better.

If the propB option is given, we need to redefine some of the internal counters and table of contents mechanisms to adapt to the fact that the proposal text is just Part B.

```
⟨*cls⟩
\ifpartB
\def\thepart{\Alph{part}}
\setcounter{part}{2}
\def\thechapter{\thepart.\arabic{chapter}}
\def\numberline#1{\hb@xt@\@tempdima{#1\hfil} }
\fi
```

\prop@sites@table

```
\newcommand\prop@sites@table{\def\@@table{}
{\let\tabularnewline\relax\let\hline\relax
\@for\@I:=\prop@gen@sites\do{\xdef\@@table{\@@table\pdataref{site}\@I{number}}
\xdef\@@table{\@@table&\@nameuse{wa@institution@\@I @name}
\ifx\@I\prop@gen@coordinatorsite (coordinator)\fi}
\xdef\@@table{\@@table&\@nameuse{wa@institution@\@I @acronym}}
\xdef\@@table{\@@table&\@nameuse{wa@institution@\@I @countryshort}\tabularnewline\hline}}}
\begin{tabular}{|l|p{8cm}|l|l|}\hline%|
\# & Participant organisation name & Short name &  Country\\\hline\hline
\@@table
\end{tabular}}
```

prop@proposal

```
\renewenvironment{prop@proposal}
{\ifgrantagreement\else
  \thispagestyle{empty}\begin{center}
  {\Large \prop@gen@instrument}\\[.2cm]
  {\Large\textbf\prop@gen@callname}\\[.4cm]
  {\LARGE \prop@gen@callid}\\[.8cm]
  {\huge\textbf\prop@gen@title}\\[.4cm]
  {\LARGE Acronym: {\prop@gen@acronym}}\\[2cm]
\end{center}
%{\large\prop@gen@instrument}\\
{\large\textbf{Date of Preparation: \today}}
% \ifsubmit\else\if@svninfo\if@gitinfo\\
% {\large\textbf{Revision}:
% \if@svninfo\svnInfoRevision\fi\if@gitinfo\gitAbbrevHash\fi
%  of
% \if@svninfo\svnInfoDate\fi\if@gitinfo\gitAuthorDate\fi}
% \fi\fi\fi
\\[1em]
\begin{large}
 \begin{description}
  % \item[Work program topics addressed by \pn:]
  %   \@ifundefined{prop@gen@topicsaddressed}
  %   {\textbf{Challenge \prop@gen@challengeid}: \prop@gen@challenge,
  %   \textbf{Objective \prop@gen@objectiveid}: \prop@gen@objective,
  %   \textbf{target outcome \prop@gen@outcomeid}) \prop@gen@outcome.
  %   {\prop@gen@topicsaddressed}\\[1em]
  \item[Coordinator:] \wa@ref{person}\prop@gen@coordinator{name}
  \item[e-mail:] \wa@ref{person}\prop@gen@coordinator{email}
  \item[tel/fax:] \wa@ref{person}\prop@gen@coordinator{worktelfax}
    \@ifundefined{prop@gen@keywords}{}{\item[Keywords:]  \prop@gen@keywords}
  \end{description}
\end{large}
\vspace*{1em}
```

```
\begin{center}
\prop@sites@table\vfill
\@ifundefined{prop@gen@iconrowheight}{}
{\@for\@site:=\prop@gen@sites\do{\wa@institution@logo[height=\prop@gen@iconrowheight]\@site\qquad}}
\end{center}
\newpage
\fi% ifgrantagreement
\setcounter{tocdepth}{2}\setcounter{part}{2}}
{\newpage\printbibliography[heading=warnpubs,maxnames=999]}

\def\prop@gen@instrument{Proposal Instrument (e.g. IP)}
```

4.3 Site Descriptions

EdN:6 [6]

sitedescription EdN:7 [7] `\begin{sitedescritpion}[`⟨*opt*⟩`]{\meta{site}}` marks up the description for the site ⟨*site*⟩. It looks up the relevant metadata from the respective `\WAinstitution` declarations. The options argument ⟨*opt*⟩ is a key-value list for the keys `logo` (add the logo from `\WAinstitution` to the site description), `width`, `height` (intended dimensions of the logo), [8].

logo
width
height

EdN:8

```
\define@key{site@desc}{box}[true]{\def\site@desc@box{#1}%
\pdata@def{sitedesc}{\@site}{box}{#1}}
\define@key{site@desc}{logo}[true]{\def\site@desc@logo{#1}%
\pdata@def{sitedesc}{\@site}{logo}{#1}}
\define@key{site@desc}{width}{\def\site@desc@width{#1}%
\pdata@def{sitedesc}{\@site}{width}{#1}\@dmp{wd=#1}}
\define@key{site@desc}{height}{\def\site@desc@height{#1}%
\pdata@def{sitedesc}{\@site}{height}{#1}\@dmp{ht=#1}}
\newenvironment{sitedescription}[2][]%
{\def\c@site{#2}% remember the site ID
\newcounter{site@#2@PM} % for the site PM
\def\site@desc@box{false}% not box unless requested
\def\site@desc@logo{false}% not logo unless requested
\def\site@desc@height{1.3cm}% default height
\def\site@desc@width{5cm}% default width
\setkeys{site@desc}{#1}% read the keys to overwrite the defaults
\ifx\@site@desc@box\@true% if we want a logo
\begin{wrapfigure}{r}{\site@desc@width}\vspace{-2.5ex}%
\begin{tabular}{|p{\site@desc@width}|}\hline\vspace{1mm}%
\ifx\@site@desc@logo\@true% if we want a logo
\wa@institution@logo[height=\site@desc@width]{#2}\\[1ex]%
\fi% end logo
\textbf{\wa@ref{institution}{#2}{type}.\hfill \wa@ref{institution}{#2}{country}}\\%
\small\wa@ref{institution}{#2}{streetaddress}, \wa@ref{institution}{#2}{townzip}\\\hline%
\end{tabular}\vspace{-2.5ex}%
\end{wrapfigure}%
\fi% end box
\pdata@target{site}{#2}%
{\subsubsection{\wa@ref{institution}{#2}{acronym}: % space here
{\textsc{\wa@ref{institution}{#2}{name}}  (\wa@ref{institution}{#2}{countryshort})}}}%
\small%
\renewcommand\paragraph{\@startsection{paragraph}{4}{\z@}%
                                    {0.25ex \@plus1ex \@minus.2ex}%
                                    {-1em}%
                                    {\normalfont\normalsize\bfseries}}}
```

[6] EdNote: this functionality should probably be refactored into proposal.dtx
[7] EdNote: document this above
[8] EdNote: more?

```
{\pdata@def{site}{\c@site}{reqPM}{\csname thesite@\c@site @PM\endcsname}}
```

participant [9] `\begin{picv}[`⟨*PM*⟩`]{\meta{name}}` marks up the CV and metadata about a principal investigator of a site (it can only be use inside a `sitedescription` environment). The first argument ⟨*PM*⟩ specifies the involvement in person months: a fair estimation this PI will spend on this specific project over its whole duration. EdN:9

```
\define@key{site@part}{type}{\def\site@part@type{#1}\@dmp{type=#1}}
\define@key{site@part}{PM}{\def\site@part@PM{#1}\@dmp{PM=#1}}
\define@key{site@part}{salary}{\def\site@part@salary{#1}}%\@dmp{\euro=#1}}
\define@key{site@part}{gender}{\def\site@part@gender{#1}}%\@dmp{\euro=#1}}
\newenvironment{participant}[2][]%
{\def\site@part@type{}\def\site@part@PM{}\def\site@part@salary{}\def\site@part@gender{}%
\setkeys{site@part}{#1}%
\ifx\site@part@PM\@empty\else\addtocounter{site@\c@site @PM}{\site@part@PM}\fi%
\paragraph*{#2\ %
(\ifx\site@part@type\@empty\else\site@part@type\fi%
\ifx\site@part@gender\@empty\else, \site@part@gender\fi%
\ifx\site@part@PM\@empty\else, \site@part@PM~PM\fi%
)}%
\ignorespaces}
{\par\medskip}
```

4.4 Work Packages, Work Areas, and Deliverables

wp*

```
\newmdenv[frametitle=Objectives]{wpobjectives}
\newmdenv[frametitle=Description]{wpdescription}
```

workpackage

```
\renewenvironment{workpackage}[1][]
{\begin{work@package}[#1]\medskip\wpheadertable%
\addcontentsline{toc}{subsubsection}{\wp@label\wp@num: \pdataref{wp}\wp@id{title}}}
{\end{work@package}}
```

\wpheadertable We redefine the macro that computes the default work package header table, since there are more sites in a EU proposal, we do this in a tabular form as asked for in the template. We use the internal counter `@sites@po` (sites plus one) for convenience.

```
\newcounter{@sitespo}\newcounter{@sitespt}
\renewcommand\wpheadertable{%
\wp@sites@efforts@lines%
\setcounter{@sitespo}{\thewp@sites@num}\addtocounter{@sitespo}{1}%
\par\noindent\begin{tabular}{|l|*{\thewp@sites@num}{c|}c|}\hline%
\multicolumn{\the@sitespo}{|l|}{\textbf{\wp@mk@title{\wp@num}: }%
\textsf{\pdata@target{wp}{\wp@id}{\pdataref{wp}\wp@id{title}}}}
&\textbf{Start: }\pdataref{wp}\wp@id{start}\\\hline%
\wp@sites@line\\\hline%
\wp@efforts@line\\\hline%
\end{tabular}\smallskip\par\noindent\ignorespaces}
```

4.5 Milestones and Deliverables

wpdelivs We make the deliverables boxed in EU proposals, this is simple with `mdframed.sty`.

```
\surroundwithmdframed{wpdelivs}
```

\milestone

```
\define@key{milestone}{verif}{\gdef\mile@verif{#1}\pdata@def{mile}\mile@id{verif}{#1}}
```

[9] EdNote: document this above

milestonetable here we do the work.

```
\define@key{mst}{caption}{\gdef\mst@caption{#1}}
\define@key{mst}{wname}{\gdef\mst@wname{#1}}
\define@key{mst}{wdeliv}{\gdef\mst@wdeliv{#1}}
\define@key{mst}{wverif}{\gdef\mst@wverif{#1}}
\newcommand\milestonetable[1][]{%
\def\mst@caption{Milestones, Deliverables, and Verification}%
\def\mst@wname{2.5cm}\def\mst@wdeliv{7cm}\def\mst@wverif{4cm}
\setkeys{mst}{#1}%
{\gdef\mst@lines{}%initialize
\let\tabularnewline\relax\let\hline\relax% so they
\let\textbf\relax\let\emph\relax% do not bother us
\edef\@@miles{\pdataref{all}{mile}{ids}}
\@for\@I:=\@@miles\do{
\edef\@delivs{\pdataref@safe{mile}{\@I}{delivs}}%
\def\@@delivs{}
\@for\@J:=\@delivs\do{\xdef\@@delivs{\@@delivs\ \pdataref{deliv}\@J{label}}}
\def\@@line{
\textbf{\pdataref{mile}\@I{label}}&
\emph{\pdataref{mile}{\@I}{title}} &
\@@delivs&
\pdataref{mile}\@I{month} &
\pdataref{mile}\@I{verif}}
\xdef\mst@lines{\mst@lines\@@line\tabularnewline\hline}}}
\begin{table}[ht]
\begin{tabular}{|l|p{\mst@wname}|p{\mst@wdeliv}|l|p{\mst@wverif}|}\hline
\#&\textbf{\miles@legend@name}
&\textbf{\miles@legend@involved}
&\textbf{\miles@legend@mo}
&\textbf{\miles@legend@verif}\\\hline\hline
\mst@lines
\end{tabular}
\caption{\mst@caption}\label{tab:milestonetable}
\end{table}
\footnotetext\miles@legend@footnote}
```

now the multilinguality support

```
\newcommand\miles@legend@name{Name}
\newcommand\miles@legend@mo{Mo}
\newcommand\miles@legend@verif{Means of Verif.}
\newcommand\miles@legend@involved{WPs\footnotemark/Deliverables involved}
\newcommand\miles@legend@footnote{The work package number is the first number in the deliverable number.}
```

\prop@milesfor the due date is the first argument to facilitate sorting

```
\newcommand\prop@milesfor[1]{\edef\@delivs{\pdataref@safe{mile}{#1}{delivs}}%
\let\m@sep=\relax\def\new@sep{,\ }%
\@for\@I:=\@delivs\do{\m@sep\pdataRef{deliv}\@I{label}\let\m@sep=\new@sep}}
```

4.6 Risks

risk

```
\newenvironment{risk}[3]
{\paragraph{Risk: #1}\hfill\emph{probability}: #2, \emph{gravity}: #3\par\noindent\ignorespaces}
{}
```

riskcont

```
\newenvironment{riskcont}[3]
{\begin{risk}{#1}{#2}{#3}\textbf{Contingency:} }
{\end{risk}}
```

4.7 Relevant Papers

\keypubs [10] EdN:10

```
\newcommand\keypubs[1]{%
\paragraph{Key publications relevant to the project}%
{\renewcommand{\baselinestretch}{.9}\prop@paperlist{#1}}}
```
⟨/cls⟩

[10] EdNote: MK: the baselinestretch manipulation does not work here, since `prop@paperslist` makes its own provisions. We should provide a way of manipulating sizes here.

References

[Koh15a] Michael Kohlhase. *Preparing Proposals in LaTeX with* `proposal.cls`. Self-documenting LaTeX package. 2015. URL: http://github.com/KWARC/LaTeX-proposal/base/proposal.pdf.

[Koh15b] Michael Kohlhase. *`workaddress.sty`: An Infrastructure for marking up Dublin Core Metadata in LaTeX documents*. Self-documenting LaTeX package. Comprehensive TeX Archive Network (CTAN), 2015. URL: http://mirror.ctan.org/macros/latex/contrib/stex/sty/workaddress/workaddress.pdf.