

PreTeXt Author's Guide

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Preface

This guide will help you *author* a PreTeXt document. So it serves as a description of the PreTeXt XML vocabulary, along with the mechanics of creating the source and common output formats. Note that this is different than *publishing* your document, which is described in the *PreTeXt Publisher's Guide*. Even if you intend to distribute your document with an open license, and you are both author *and* publisher, it is still helpful and instructive to understand, and separate, the two different steps and roles.

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Chapter 1

Start Here

Welcome to the Author’s Guide for PreTeXt. You are likely eager to get started, but familiarizing yourself with this chapter should save you a lot of time in the long run. We will try to keep it short and at the end of early chapters we will guide you on where to go next. Not everything we say here will make sense on your first reading, so come back after your first few trial runs.

1.1 Philosophy

PreTeXt is a **markup language**, which means that you explicitly specify the logical parts of your document and not how these parts should be displayed. This is very liberating for an author, since it frees you to concentrate on capturing your ideas to share with others, leaving the construction of the visual presentation to the software. As an example, you might specify the content of the title of a chapter to be `Further Experiments`, but you will not be concerned if a 36 point sans-serif font in black will be used for this title in the print version of your book, or a CSS class specifying 18 pixel height in blue is used for a title in an online web version of your book. You can just trust that a reasonable choice has been made for displaying a title of a chapter in a way that a reader will recognize it as a name for a chapter. (And if all that talk of fonts was unfamiliar, all the more reason to trust the design to software.)

You are also freed from the technical details of presenting your ideas in the plethora of new formats available as a consequence of the advances in computers (including tablets and smartphones) and networks (global and wireless). Your output “just works” and the software keeps up with technical advances and the introduction of new formats, while you concentrate on the content of your book (or article, or report, or proposal, or ...).

If you have never used a markup language, it can be unfamiliar at first. Even if you have used a markup language before (such as HTML or basic \LaTeX) you will need to make a few adjustments. Most word-processors are WYSIWYG (“what you see is what you get”). That approach is likely very helpful if you are designing the front page of a newspaper, but not if you are writing about the life-cycle of a salamander. In the old days, programs like `troff` and its predecessor, `RUNOFF` (1964), implemented simple markup languages to allow early computers to do limited text-formatting. Sometimes the old ways are the best ways.

PreTeXt is what is called an **XML application** or an **XML vocabulary** (I prefer the latter). Authoring in XML might seem cumbersome at first, but you will eventually appreciate the long-run economies, so keep an open mind. And if you are already familiar with XML, realize we have been very careful to design this vocabulary with human authors foremost in our mind.

Principles The creation, design, development and maintenance of PreTeXt (MBX here) is guided by the following list of principles. They may not be fully understood on a first reading, but should be useful as you become more familiar with authoring texts with PreTeXt and should amplify some of the previous discussion.

1. MBX is a markup language that captures the structure of textbooks and research papers in the mathematical sciences.
2. MBX is human-readable and human-writable.
3. MBX documents serve as a single source which can be easily converted to multiple other formats, current and future.
4. MBX respects the good design practices which have been developed over the past centuries.
5. MBX makes it easy for authors to implement features which are both common and reasonable.
6. MBX supports online documents which make use of the full capabilities of the Web.
7. MBX output is styled by selecting from a list of available templates, relieving the author of the burden involved in micromanaging the output format.
8. MBX is free: the software is available at no cost, with an open license. The use of MBX does not impose any constraints on documents prepared with the system.
9. MBX is not a closed system: documents can be converted to L^AT_EX and then developed using standard L^AT_EX tools.

List 1.1.1: PreTeXt Principles

1.2 Formatting Your Source

There are a lot of details related to how you prepare your **source**: the actual files that you, and you alone, will create. At least skim through the following, come back here often, and also consult $\langle\langle$ exhaustive-chapter-on-source-files $\rangle\rangle$.

File Format Your source should be plain **ASCII files** which you will create with a text editor. In other words, do not create your source with Word, LibreOffice, WordPerfect, AbiWord, Pages or similar programs. Popular text editors include vi, emacs, Notepad, Notepad++, Atom, TextWrangler, and BBEdit. I have had a very good experience with Sublime Text, which is cross-platform (Windows, OS X, Linux), and can be used for free, though it has a very liberal license and is well worth the cost. Sometimes these editors are known as a **programmer's editor** (though we will be doing no programming). Support for writing HTML sometimes translates directly to good support for XML.

There are **XML editors**, which I have generally found too complex for authoring in PreTeXt. They do have some advantages and XML Copy Editor is one that I have found that is possibly useful.

Learn to Use Your Editor Because XML requires a closing tag for every opening tag, it feels like a lot of typing. Your editor should know what tag to close next and there should be a simple command to do that. Discover this first and consider switching editors if it is not available. For me, in Sublime Text on Linux, I just press **Alt-Period** and get a closing tag. Not only is this quick and easy, I often recognize that I am not getting the tag I expected since I forgot to close one earlier. This one shortcut can pretty much cut your authoring overhead in half.

If your editor can predict your opening tag, all the better. Sublime Text recognizes that I already have a `<section>` elsewhere, so when I start my second section, I very quickly (and automatically) get a short list of choices as I type, with the one I want at the top of the list, or close to it.

Invest a little time early on to learn, and configure, your editor and you can be even more efficient about capturing your ideas with a minimum of overhead and interference.

Revision Control If you are writing a book, or if you are collaborating with co-authors, then you owe it to yourself and your co-authors to learn how to use revision control, which works well with PreTeXt. The hands-down favorite is `git` which has a steep learning curve, and so is beyond the scope of this guide. But see `<(topic-git-coexistence)>` which has hints on how to best use `git` together with a PreTeXt project and look for Beezer and Farmer’s *Git For Authors*.

Whitespace The term **whitespace** refers to characters you type but typically do not see. For us they are **space**, **non-breaking space**, **tab** and **newline** (also known as a “carriage return” and/or “line feed”). Unlike some other markup languages, PreTeXt *does not ever use whitespace* to convey formatting information.

In some parts of a PreTeXt document, every single whitespace character is important and will be transmitted to your output, such as in the `<input>` and `<output>` portions of a `<sage>` element. Since Sage code mostly follows Python syntax, indentation is important and leading spaces must be preserved. But you can indent all of your code to match your XML indentation and the entire `<input>` (or `<output>`) content will be uniformly shifted left to the margin in your final output.

In other parts of a PreTeXt document, every single whitespace character is ignored, and you have the freedom to use indentation and blank lines to help you understand the logical structure of your document. An example is that you can add as much whitespace as you like between the paragraphs of a section, such as a preceding blank line and indentation, and none of it will affect your output in any way.

Never use tabs, they can only cause problems. You may be able to set your editor to translate the tab key to a certain number of spaces, or to translate tabs to spaces when you save a file (and these behaviors are useful). I have Sublime Text configured to show me every single space as a small faint dot, since I like to be certain I have no stray whitespace *anywhere*.

Structure of your Source XML is hierarchical, like a family tree. Books contain chapters, chapters contain sections, sections contain paragraphs, etc. I like to reflect each new level of containment by consistently indenting four spaces (you might prefer two spaces). A good editor will visually respect this indentation, and help you with maintaining the right indentation with each new line, so much so, that you will forget how much assistance it is providing.

Develop a style and stick with it. I put titles on a new line (indented) after I create a new chapter or section, some people like them on the same line, immediately adjacent. I put a single blank line before each new paragraph, but not after the last. And so on. The choice is yours, but consistency will pay off when you inevitably come back to edit something. You have put a lot of work and effort into your source. You will be rewarded with fewer problems if you keep it neat and tidy, and you will also get very clean output.

1.3 Where Next?

We will end each of the early chapters with suggestions on where to read next.

If you are impatient (sometimes a good quality!), then [Chapter 2](#) should be next, where we construct and process a short example and then expand it slightly with several additions.

If you would like a general, high-level overview of features skip ahead to [Chapter 3](#).

Chapter 2

A Careful, Quick, Minimal Example

We are going to walk you through a simple example carefully, with some explanation along the way. There are two steps. First we will author your source and then after some setup, we will process your source file into output.

2.1 Authoring

Having read already about text editors in [Section 1.2](#), fire up your text editor and begin a text file that you will name `quickstart.xml`.

Though it is optional, it will be good practice to always make the first line of your file the following. This will identify your source file as an XML file, but the exact particulars are not important now.

```
<?xml version="1.0" encoding="UTF-8"?>
```

Every PreTeXt document is enclosed inside `<mathbook>` tags and we will be writing an `<article>`. So extend your source to the following.

```
<?xml version="1.0" encoding="UTF-8"?>
<mathbook>
  <article>
  </article>
</mathbook>
```

Notice how every opening tag (no slash) has a paired closing tag (with a slash, plus the identical name). We would like to our article to have some content, so we will add a short paragraph with a single sentence. So finish your file off as follows and save it.

```
<?xml version="1.0" encoding="UTF-8"?>
<mathbook>
  <article>
    <p>This is a short sentence.</p>
  </article>
</mathbook>
```

That's it. You now have a complete, properly-formed PreTeXt document. You are ready to organize the two tools necessary to process your source into different formats.

2.2 Setup

There are two components to processing your document, the PreTeXt stylesheets and the `xsltproc` program. We work at the **command-line** inside of a **terminal** or **console**. If you do not know what this is, it will

seem very primitive at first. Sometimes the old ways are the best ways. This will be called a “Command Prompt” in Windows or a “Terminal” on a Mac. In Linux it may be known as a “console” or a “shell”. A tutorial, which is Linux-specific, can be found at [Ryan’s Tutorials](#) and certainly others exist.

The operating system on a Mac is built on Unix, which is very similar to Linux, so most of the directions here will be little changed between the two. Procedures can be very different in Windows ([Appendix E](#), [Appendix F](#)). One alternative is [CoCalc](#) which provides a full Linux computer for free in your web browser, so that may be an excellent place for initial experiments ([Section 4.12](#)).

Step 1: PreTeXt You need to obtain the PreTeXt stylesheets, which are the main part of PreTeXt. Since you are reading this, it may be possible that you have this already. You can use `git` to **clone** the PreTeXt from the GitHub repository, and then be sure to checkout the `dev` branch to have the latest version. This is the best way to go, and you should only download the repository as a zip file once for an initial experiment, and then switch to using a clone instead.

Once you have a clone of the repository, you can issue `git pull`, and git will update your local copy with any recent changes. You should do this *regularly*—meaning on the order of *daily*. See the [FAQ entry](#) for more about why we *expect* you to do this.

See the website at mathbook.pugetsound.edu for details and commands for this step, right on the main page.

Step 2: xsltproc This is the command-line program which takes your document and a PreTeXt stylesheet to together produce output. On Linux or a Mac you probably already have it installed as part of system software. On Windows it is not so simple.

In either case see the website for details about verifying you have this, or how to install it.

2.3 Processing

At a command prompt in your terminal or console adjust the pathnames for the two files and execute:

```
xsltproc /path/to/mathbook/xsl/mathbook-html.xsl /path/to/quickstart.xml
```

In the current working directory you should now find the file `article-1.html` which you can view in a web browser. (You will want an internet connection since various parts of the page come from the network. Someday we will create output for the offline situation.) It will look very plain, but you should be able to read the sentence.

Now, try the following, again with adjusted paths:

```
xsltproc /path/to/mathbook/xsl/mathbook-latex.xsl /path/to/quickstart.xml
```

In the current working directory you should now find the file `article-1.tex` which you can process with `pdflatex` or `xelatex` at the command line as below. If you do not have \LaTeX installed on your system, you could process this file within a variety of online services, and CoCalc would be an obvious choice.

```
pdflatex article-1.tex
```

In the current working directory you should now find the file `article-1.pdf` which you can view or print with standard PDF viewing software. You could even send it to a print-on-demand service to get nice hardback books, though I suspect sales will not be great.

That’s it. You now know all the basics of authoring with PreTeXt, since you have produced two radically different output formats with identical content from the exact same structured input, via two different command lines. Everything you need to author a complete article or textbook, and produce it in many different formats, is just an extension or variation on what you just did. Let us look at a few simple extensions right away before being more methodical.

2.4 Extending the Minimal Example

We will not keep reproducing the entire example but instead suggest a series of modifications. After each edit, process the file again to make sure your syntax is correct (before you get too far along) and to see the changes.

The generic name of the resulting files is pretty bland, and it would be nice to have a title for our article. We will add an **attribute** to the `<article>` tag, specifically `@xml:id`, which is a very important part of PreTeXt and used frequently. For now, it will be used to generate the names of the output files. (The “at” symbol is a way of reminding you that it is an attribute, it is not part of what you author.)

So make the following modifications:

```
<article xml:id="quick">
  <title>My First Small Example</title>

  <p>This is a short sentence.</p>
```

Your outputs should now have a title, and more importantly, the filenames will be `quick.html` and `quick.tex`. Of course, you might like your outputs to have similar names to your input, but you see that this is not necessary.

Let us give our article a bit of structure. We will have an introduction and two sections with their own titles. So replace the one-sentence paragraph by the following, all following the article title and contained within the `<article>` tags. Remember, *do not* include any newlines (carriage returns, line feeds, hard wrap) in the longer lines. (We have to format things differently so you can see exactly what is happening.)

```
<introduction>
  <p>Let's get started.</p>
</introduction>

<section xml:id="section-short">
  <title>Beginnings</title>

  <p>This is a short sentence.</p>
</section>
```

```
<section xml:id="section-multiple-paragraph">
  <title>Endings</title>

  <p>This is a longer sentence that is followed by another sentence.
  Two sentences, and a second paragraph to follow.</p>

  <p>One more paragraph.</p>
</section>
```

The L^AT_EX/PDF output will be a bit odd looking since every paragraph is so short, but all the content should be there. Notice that the HTML output now has a table of contents to the left and active navigation buttons. Also the two sections are in their own files and the URLs have been constructed from the supplied values of the `@xml:id` attribute.

One last experiment—let us add some mathematics. We use XML tags, `<m>` for “inline” mathematics and `<me>` for a “math equation” which will be rendered with a bit of vertical separation and centered from left to right. We use L^AT_EX syntax for mathematics, which has been the standard for working mathematicians for decades. For electronic presentation, we rely on the excellent [MathJax](#) project which basically supports all the syntax of the [amsmath](#) package from the American Mathematical Society. Add the following sentence to any of the paragraphs of your article.

If the two sides of a right triangle have lengths `<m>a</m>` and `<m>b</m>` and the hypotenuse has length `<m>c</m>`, then the equation `<me>a2 + b2 = c2</me>` will always hold.

So your final source file might look like the following. You now have many of the basic skills you would need to write an entire research article in mathematics, and should be in a position to learn the remainder easily and quickly.

```
<mathbook>
  <article xml:id="quick">
    <title>My First Small Example</title>

    <introduction>
      <p>Let's get started.</p>
    </introduction>

    <section xml:id="section-short">
      <title>Beginnings</title>

      <p>This is a short sentence.</p>
    </section>

    <section xml:id="section-multiple-paragraph">
      <title>Endings</title>

      <p>This is a longer sentence that is followed by another sentence.
      Two sentences, and a second paragraph to follow.</p>

      <p>One more paragraph. If the two sides of a right triangle have
      lengths <m>a</m> and <m>b</m> and the hypotenuse has length <m>c</m>,
      then the equation <me>a^2 + b^2 = c^2</me> will always hold.</p>
    </section>
  </article>
</mathbook>
```

2.5 Where Next?

Next chapter has more detail.

Chapter 3

Overview of Features

This chapter is a high-level view of the important concepts, features and design decisions that go into the creation of PreTeXt. For careful exact descriptions of details, we will direct you to one of the many sections in the (*) [Topics](#) chapter. So this chapter should make you aware of what is possible and expand on the philosophy described earlier in [Section 1.1](#), while also giving you examples of many basic constructions you can use to get started quickly.

3.1 Structure

A PreTeXt document is a nested sequence of **structural divisions**. For a book, these would go `<part>`, `<chapter>`, `<section>`, `<subsection>`, and `<subsubsection>`. Using `<part>` is optional (and not yet fully implemented), but a book must always use `<chapter>` (or else it is not a book!). No skipping over divisions. For example, you cannot divide a `<section>` directly into several `<subsubsection>`s without an intervening `<subsection>`.

An `<article>` starts divisions from `<section>`, though it may choose to have no divisions at all. `<paragraphs>` are exceptional. They lack a full set of features, but can be used to divide anything, in books or in articles, though they are always terminal since you cannot divide them further. You will have noticed that we prefer the generic term **division** (rather than “section”) since a `<section>` is a very particular division.

A division may be unstructured, in which case you fill it with paragraphs and lists and figures and theorems and so on. But if you choose to structure a division it must look like an optional `<introduction>`, followed by multiple divisions of the next finer granularity, with an optional `<conclusion>`.

Every division tag can carry an `@xml:id` attribute, and it is a good practice to (a) provide one, (b) use a very short list of words describing the content, and (c) adopt a consistent pattern of your choosing. Do not use numbers, you may later regret it. These are optional, and with practice you will learn how best to use them. See [Section 3.3](#) just below for more on this.

The `<exercises>` and `<references>` tags are special divisions, see [Section 6.1](#) and [Section 6.2](#).

This explanation is expanded and reiterated at [Section 6.5](#) and is worth reading earlier rather than later.

3.2 Paragraphs

Once you have divisions, what do you put into them? Most likely, paragraphs. We use long, exact names for tags that are used infrequently, like `<subsubsection>`. But for frequently used elements, we use abbreviated tags, often identical to names used in HTML. So a paragraph is delimited by simply the `<p>` tag.

Lots of things can happen in paragraphs, some things can *only* happen in a paragraph, and some things are *banned* in paragraphs. Inside a paragraph, you can emphasize some text (``), you can quote some text (`<q>`), you can mark a phrase as being from another language (`<foreign>`), and much more. You can use special characters like an ampersand (&, `<ampersand />`) or an octothorpe, aka “hash tag” (#, `<hash />`). You must put a list inside a paragraph, and all mathematics ([Section 3.5](#)) will occur inside a paragraph. You

cannot put a `<table>` or a `<figure>` in a paragraph, and many other structured components are prohibited in paragraphs.

Paragraphs are also used as part of the structure of other parts of your document. For example, a `<remark>` could be composed of several `<p>`. As you get started with PreTeXt, remember that much of your actual writing will occur inside of a `<p>` and you will have a collection of tags you can use there to express your meaning to your readers.

3.3 Cross-References

Cross-references in a PreTeXt document are easy, powerful and flexible. So it is worth familiarizing yourselves with them early, here and then ahead in [Section 6.4](#).

Any element that you place a `@xml:id` on can become the target of a cross-reference. This could be a division, a remark, a bibliographic entry, or a figure. So for example, suppose your source had `<subsection xml:id="subsection-flowers">` and someplace else you wrote `<xref ref="subsection-flowers" />`. Then at the latter location you would get a reference to the Subsection that discusses flowers. In print this might just be the number for the subsection, but in various electronic output formats, these cross-references can be very powerful interactive ways to explore the content. And the mechanism is always the same, pair up an `@xml:id` on a target with a `@ref` on an `<xref>` cross-reference.

Since the value of an `@xml:id` is also used in a variety of ways, such as to construct some file names, some care should be taken in how you author them. We limit the possible characters to letters and numbers (a-z, A-Z, 0-9), with hyphens and underscores (-_) available as word-separators. Our advice is to stick to lowercase letters, though we are not yet aware of any problems with case-insensitivity. So in short, use **kebab-case** or **snake-case** for your `@xml:id` values.

For more, see [Section 6.4](#) because cross-references have many features. But first, here are two features you do not want to miss. In the early stages of writing, you can author `<xref provisional="subsection-flowers" />` to point to a subsection you are contemplating (but have not written yet) and you will get various polite reminders to get that straightened out eventually. Also the default behavior is to automatically provide the generic name of the target, so you will get something like “Subsection 4.3.2” without ever typing the “Subsection” part. If you move the target, the generic name will adjust if necessary, and if you switch to one of the supported languages, the generic name will switch language (see `<<topic-on-languages>>`).

3.4 Titles

Divisions always need titles, you accomplish this with a `<title>` tag first thing. Almost everything that you can use in a paragraph can be used in a title, but a few constructions are banned, such as a displayed mathematical equation (for good reason). Try to avoid using footnotes in titles, even if we have tried to make them possible.

Lots of other structures admit titles. Experiment, or look at specific descriptions of the structure you are interested in. Titles are very integral to PreTeXt, much like cross-references. Titles migrate to the Table of Contents, get used in page headers for print output, can be used in lists (such as a List of Figures), and can be used as the text of a cross-reference, instead of a number. You might not be inclined to give a `<remark>` a title, but it would be good practice to do so. Your electronic outputs will be much more useful to your readers if you routinely title every structure that allows.

3.5 Mathematics

With experience, you may realize that PreTeXt utilizes three principal languages. One is the narrative of everyday sentences and paragraphs. Most of what you write in a paragraph, or a table cell, or a title, or a caption, or an index heading, is in this language. Then there is the structural language, which is the majority of the elements in PreTeXt, such as `<chapter>`, `<theorem>`, or `<figure>`. Then finally, there is the language of mathematical symbols and notation.

A key design decision is that mathematical symbols, expressions and equations are authored using L^AT_EX

syntax. More precisely, we support the symbols and constructions provided by [MathJax](#), which quite closely follows the `amsmath` package maintained by the American Mathematical Society. Neither you nor I want to write [MathML](#) by hand!

For **inline** mathematics, use the short `<m>` tag within a `<p>` (or within a `<title>` or `<caption>`). For example, `<m>\alpha^2 + \beta^4</m>` will do what you expect, in print and in electronic outputs. To get a single equation, centered, with some vertical separation before and after, use the `<me>` tag (“math equation”) in the same way within a `<p>`, but do not try using it within a `<title>`. For example, `<me>\rho = \alpha^2 + \beta^4</me>`. If you want your equation numbered, switch to the `<men>` tag (n = “numbered”).

There is a way to incorporate your own (simple) custom \LaTeX macros within mathematics (only). They will be effective in your print and electronic outputs, and can be employed in graphics languages like `tikz` and `Asymptote`. You can also author multi-line **display mathematics** using the `<md>` tag surrounding a sequence of `<mrow>` elements (or the `<mdn>` variant for numbered equations). We defer the details to [Section 6.6](#).

3.6 Images

You can include an image via the `<image>` tag. You can use the `@source` attribute to provide a filename, likely prefixed by a relative path, that points at an image file. It is your responsibility to locate that file properly relative to your output, and that the file format is compatible. So, for example, suppose your source contained `<image source="images/butterflies.jpg" />`. Then you would want to have a directory named `images` below wherever you process your \LaTeX output, or wherever you place your HTML output on a web server. The `@width` attribute can be used to control the size of the image. Widths are expressed as a percentage of the available width, such as `width="60%"`.

You may want to wrap your image in a `<figure>` to have it centered, and to have some vertical separation above and below. A `<figure>` must also have a `<caption>`, and the figure will be numbered.

If you want to place an anonymous image (no caption, no number), then you must wrap it in a `<sidebyside>`. Note also that the `<sidebyside>` tag provides some very flexible options for placing several images ([Section 3.15](#)) together, or combining figures with subcaptions.

If you wish to construct technical diagrams, with editable source, and perhaps including the use of \LaTeX macros, `PreTeXt` provides support for graphics languages like `PGF`, `TikZ`, and `Asymptote`, in addition to using Sage code to describe a plot or image. In most cases output can be obtained as smoothly-scalable SVG images, in addition to other formats like PDF or PNG. Making all this happen is one of the more technical aspects of `PreTeXt`, so we save the discussion for one of the topics, `<<topic-image-languages>>`.

3.7 Lists

Ordered lists (numbered), unordered lists (bullets) and description lists (defined terms) are all supported, and syntax generally follows HTML. Lists always live within a paragraph (`<p>`). Their structure is given by the ``, ``, `<dl>` tags (respectively). These can specify a variety of options for the labels via attributes, as described in [Section 6.7](#). Because a paragraph has mixed-content, you want to place these list-initiating tags immediately after the character preceding it, with no intervening whitespace, and specifically not with an intervening newline.

Once inside a list, you may use as much whitespace as you choose between the list items. Typically you would indent one level, start each list item on its own line, and perhaps use blank lines between list items of a complicated list.

List items, for any of the three types, are delimited with the `` tag. What is different from HTML is that the contents of a list item may be structured, with paragraphs (`<p>`) being the most likely. So to nest lists you begin a paragraph in a list item of the outer list, then begin the inner list within that paragraph. But a simple list item may be authored as mixed-content, much like a sentence elsewhere. For a description list, the list item should contain a `<title>`, which will become the text that is being described. A description list typically does not contain a nested list, nor is a description list contained within another list.

3.8 Exercises

An exercise can appear in the narrative as an **inline exercise** or in a special `<exercises>` division and is then known as a **sectional exercise**. The syntax is the same in both cases, there are just some minor differences in their use and treatment. The `<exercises>` division can be used at any level. In other words, it can be a peer of any other division.

An `<exercise>` is a mandatory `<statement>` followed by possibly several optional `<hint>`, `<answer>` and/or `<solution>`. Conceptually, an `<answer>` is a short final result, while a `<solution>` provides details about the route to the answer. Each of these four components is structured further, with paragraph-like elements, and the exercise itself may have a `<title>`.

You need (and want) to have the hints, answers and solutions grouped with the statement, but there is a lot of flexibility on making these available at the location of the exercise, or in the back matter. See [Section 6.8](#) for more.

An inline exercise typically gets a fully qualified unique number and is rendered similar to an `<example>` or a `<remark>`. A sectional exercise only gets a sequential number, though this can be overridden with the `@number` attribute if you want to maintain stable numbering in response to edits. (Be careful, once you override the sequential numbering, you probably need to manually specify every subsequent number, so save overrides for when your project matures.)

Within a run of sectional exercises a subgroup can be delimited as an `<exercisegroup>`, which allows an `<introduction>` and/or `<conclusion>` to explain some commonality. An `<exercisegroup>` should be rendered in some way that makes it clear to the reader that they are a group.

3.9 References

Like `<exercises>`, a `<references>` division may go anywhere a more typical division could go. This allows for things like a “Further Reading” list at the end of every chapter of a book. These are populated with `<biblio>` items that are individual bibliographic entries. Support is presently very minimal, but is planned to improve.

3.10 Figures and Tables

Figures and tables have outer structures, `<figure>` and `<table>` which can contain a `<title>` (for cross-references, such as in a list of figures) and a `<caption>`. The presence of a `<caption>` generates a number for the figure or table. These outer structures also generate some vertical separation between surrounding elements.

A `<table>` may only contain a `<tabular>`, which is the structure containing the rows and columns of a table. Details can be found in [Section 6.10](#).

A `<figure>` is more liberal than a `<table>` and may contain a variety of items. Most probably, you will include an `<image>` (see [Section 3.6](#)).

3.11 Programs and Consoles

If you are writing about scientific or engineering topics, you may wish to include sample computer programs, or command-line sessions.

A `<program>` will be treated as verbatim text (see [Section 3.13](#)), subject to all the exceptions for exceptional characters. Indentation will be preserved, though an equal amount of leading whitespace will be stripped from every line, so as to keep the code shifted left as far as possible. So you can indent your code consistently along with your XML indentation. For this reason it is best to indent with spaces, and not tabs. A mix will almost surely end badly, and in some programming languages tabs are discouraged (e.g. Python).

The `@language` attribute may be used to get some degree of language-specific syntax highlighting. See [Section 6.11](#) for details.

A `<console>` is a transcript of an interactive session in a terminal at a command-line. It is a sequence of the following elements, in this order, possibly repeated many times as a group: `<prompt>`, `<input>`,

and `<output>`. The `<output>` is optional, and a `<prompt>` is only displayed when there is an immediately subsequent `<input>` (which could be empty). The content is treated as verbatim text (see [Section 3.13](#)), subject to all the exceptions for exceptional characters.

A `<program>` or `<console>` may be wrapped in a `<listing>`, which is analogous to a `<figure>` or `<table>`. A `<listing>` may contain a `<title>` for use in cross-references or lists. A `<caption>` will be displayed and will generate a number.

3.12 Special Characters

An advantage of XML syntax is that very few characters are reserved for the language’s use, and thus very few characters need to be escaped. Of course, there is always the need to escape the escape character.

The escape character for XML is the ampersand, `&`. The other dangerous character is the left angle bracket, the “less than,” `<`. Mostly to be symmetric, we also handle the right angle bracket, the “greater than,” `>`, similarly. Single and double quotation marks are used to delimit attributes, so are part of the XML specification, but do not present difficulties in narrative text.

In normal writing, always use the empty elements `<ampersand />`, `<less />`, and `<greater />`. Inside of mathematics elements, or code for images written in \LaTeX , always use the pre-defined macros, `\amp;`, `\lt;`, `\gt;`. In verbatim text (such as programs) always use the XML entities `&`, `<`, `>`.

If you consistently follow the rules in the previous paragraph you will avoid a descent into escape-character hell and avoid a lot of head-scratching. In particular, you should have no need of the `<![CDATA[]>` mechanism of XML, so just forget we even mentioned it.

Print and PDF output is generated via \LaTeX , which has a good many special characters. So to preserve conversion to this format, you should consistently use provided empty elements for these characters. Here are the characters and their corresponding elements.

#	<code><hash /></code>
\$	<code><dollar /></code>
%	<code><percent /></code>
^	<code><circumflex /></code>
&	<code><ampersand /></code>
_	<code><underscore /></code>
{	<code><lbrace /></code>
}	<code><rbrace /></code>
~	<code><tilde /></code>
\	<code><backslash /></code>

Table 3.12.1: \LaTeX ’s reserved characters and their elements

There are some other empty elements, which are conveniences for certain characters, or sequences of characters, that are difficult or unusual in \LaTeX and also somewhat obscure as Unicode characters. Two examples are the copyright symbol, $\text{\textcircled{C}}$, and constructions like the abbreviation “e.g.” for *exempli gratia*. We will document these later.

3.13 Verbatim and Literal Text

Typesetting literal text, usually in a monospace font, can sometimes be tricky. For short bits of such text, as part of a sentence in a paragraph, or in a caption or title, use the `<c>` tag, which is short for “code.” For much longer blocks of literal text, with line breaks that are to be preserved, use the `<cd>` element within a paragraph (“code display”). Outside a paragraph, most anywhere you could place a regular paragraph, use the `<pre>` tag, which is short for “pre-formatted”.

For the content of a `<pre>` element, the indentation will be preserved, though an equal amount of leading

whitespace will be stripped from every line, so as to keep the code shifted left as far as possible.

The behavior of these two tags is to preserve characters exactly. Certainly the ASCII character set will behave as expected, and Unicode characters will migrate successfully to output formats based on HTML. As mentioned in [Section 3.12](#) the ampersand and left angle bracket will confuse the initial XML processing. So use the XML entities `&`, `<`, `>` to represent these characters to the XML processor, `xsltproc`. See [Section 6.3](#) for further details.

3.14 Sage

[Sage](#) is an open source library of computational routines for symbolic, exact and numerical mathematics. It is designed to be a “viable free open source alternative to Magma, Maple, Mathematica, and Matlab.” PreTeXt contains extensive support for including example Sage into your document.

A typical use of the `<sage>` tag is to include an `<input>` element, followed by an `<output>` element. The content of the `<input>` element may be presented statically in PDF output, or dynamically as a Sage Cell in an output format based on HTML. Of course, for output as a CoCalc worksheet, the Sage code is presented in the worksheet’s native format.

The content of the `<output>` element is included in PDF output, but not in dynamic instances, since it can be re-computed. Notably, there is a conversion which pairs input and output into a single file in the format used by Sage’s `doctest` framework. So if expected output is provided, it becomes automatic to identify when Sage has diverged from your expectations, and you can adjust your examples accordingly.

The Sage Cell Server can also be configured to interpret different languages, because Sage by default contains everything needed to evaluate code in these languages. This is done by providing a `@language` attribute, where possible values are `sage`, `gap`, `gp`, `html`, `maxima`, `octave`, `python`, `r`, and `singular`. The default is `sage`.

Note that the dynamic formats (including the Sage Cell) may run Sage “interacts,” so that is possible to embed interactive demonstrations into your dynamic output formats.

3.15 Side-by-Side Panels

A `<sidebyside>` is a useful organization of elements in a horizontal layout, and so begins to blur the line between content and presentation. While we default to organizing information in a vertical sequence, it is often desirable to organize smaller elements adjacent to each other horizontally. Specifically, images, tabular, figures, tables, paragraphs, and more, may all be combined and there is good control over vertical and horizontal alignment. Captioning, both overall and individually, is especially flexible. An `<sbsgroup>` (“side-by-side group”) collects multiple `<sidebyside>` to stack vertically, which allows for displays in grids. See [Section 6.12](#) for details.

3.16 Mathematical Results

Definitions, theorems, corollaries, etc. are supported by the tags: `<theorem>`, `<corollary>`, `<lemma>`, `<algorithm>`, `<proposition>`, `<claim>`, `<fact>`, `<definition>`, `<conjecture>`, `<axiom>`, and `<principle>`. Each may have a `<title>` (strongly encouraged), and then contains a `<statement>` which is a sequence of paragraphs and other elements. As appropriate, some of these elements (such as a `<lemma>`) may contain an optional `<proof>` (or several), while other elements may not have a `<proof>` (such as a `<conjecture>`).

A `<definition>` is a natural place to define notation as well (see [Section 3.19](#)), and to use the `<term>` tag to identify the terminology being defined.

In order to assist readers locating numbered items, these items are all numbered consecutively in a group that includes `<example>`s, `<remark>`s and inline `<exercise>`s.

3.17 Front Matter

In the beginning of your `<book>` or `<article>` you can have a `<frontmatter>` element that contains various items that would precede your first `<chapter>` or `<section>` (respectively). Possibilities include `<titlepage>`, `<colophon>`, `<biography>`, `<abstract>`, `<dedication>`, `<acknowledgement>`, `<foreword>`, and `<preface>`. Some of these may be duplicated (e.g. several prefaces for multiple editions), many of these items are restricted to books (e.g. a foreword), and some items are restricted to articles (e.g. an abstract). The DTD (`<<dtd-info>>`) will help you place them in the right order in your source. See [Section 6.13](#) for details.

3.18 Back Matter

Similar to front matter, there is material you might wish to include after your book’s final `<chapter>` or your article’s final `<section>`. Possibilities to place in a `<backmatter>` include `<appendix>`, `<references>`, `<index-part>`, and `<colophon>`. There are empty tags you can place into an appendix to generate lists of notation, or lists of particular elements of your choice, such as a list of figures. A similar empty element actually generates the index, `<index-list />`. See [Section 6.13](#) for details on the back matter generally, and [Section 6.14](#) for more on automatic lists.

3.19 Index and Notation Entries

Construction of an index and a list of notation is accomplished by placing information into your text in the appropriate places in the right way.

The `<idx>` tags denote an index entry. These should be placed within the element that they describe. By this we mean that an `<idx>` element can be placed within a `<theorem>` to refer to just that theorem, or it might be placed within a `<subsection>` to refer to that subsection. In this way, electronic versions of your work can have an index that is more informative than a traditional index that uses just page numbers. Note that the text contained within the `<idx>` tags does not actually appear in the article—it only serves to mark the location the index entry points to. You can have several levels of headings by structuring your `<idx>` element with up to three `<h>` tags. Alternatively, after the first use of an `<h>` element, you can use `<see>` or `<seealso>` to denote a “see” or “see also” in the index entry, respectively.

A similar device is used to create a list of notation for a technical (mathematical) work. Place a `<notation>` element as close as possible to the place where notation is first introduced. If you use the `<definition>` tag for your definitions, then this is a very natural place to also introduce notation. Inside of `<notation>` use the `<usage>` tag to include a short example of the notation in use. This will be treated as mathematics, so imagine that it will be wrapped in an `<m>` tag and use L^AT_EX syntax. The `<description>` tag should contain a very short description in words of what the notation is for. So “center of a group” would be a good description to accompany the usage “ $Z(G)$.”

3.20 WeBWorK Exercises

It is possible to author WeBWorK automated homework problems directly within your source. A static version will be rendered in your L^AT_EX/PDF/print output, and a “live” version will be rendered into HTML output (though a student is not able to authenticate against a course). However, you can also extract *all* of the WeBWorK questions from a textbook into a single archive suitable for uploading into a traditional WeBWorK server. This is a big topic, so see the dedicated [Chapter 9](#) for details.

3.21 URLs and External References

The `<url>` tag always requires an `@href` attribute. Usually this will be some external web page, or other resource. If the `<url>` is empty, then the value of the `@href` attribute will be the link text, typically in a monospace font. You can also provide your own content, using elements much like any other piece of text that would occur in a paragraph. Of course, there is no need to anticipate any problems with L^AT_EX output

and special characters like a tilde. Use the character itself in the @href, and use the <tilde> element in the content (or wrap the content in the <c> element and use the literal character).

This element may also be used to link to external data files. See [Section 6.15](#) for details.

3.22 Video

Videos, either author-hosted or hosted on YouTube, may be embedded in a PreTeXt document using HTML, or may be “popped-out” to view on another page. For a YouTube video, an author need only supply the identification string, and all the details of the embedding are handled by PreTeXt. See [Section 6.16](#) for details.

3.23 Scientific Units

If you are writing about science or engineering, or even if you are not, there is extensive support for scientific units. So, for example, you could author a force in metric units as

```
<quantity>
  <mag>20.7</mag>
  <unit prefix="kilo" base="gram" />
  <unit base="meter" />
  <per base="second" exp="2" />
</quantity>
```

This would be rendered as $20.7 \frac{\text{kg}\cdot\text{m}}{\text{s}^2}$. More in [Section 6.17](#).

3.24 Accessibility

The [Web Accessibility Initiative](#) at W3C (www.w3.org) says:

The Web is fundamentally designed to work for all people, whatever their hardware, software, language, culture, location, or physical or mental ability. When the Web meets this goal, it is accessible to people with a diverse range of hearing, movement, sight, and cognitive ability.

Thus the impact of disability is radically changed on the Web because the Web removes barriers to communication and interaction that many people face in the physical world. However, when websites, web technologies, or web tools are badly designed, they can create barriers that exclude people from using the Web.

Since we are interested in helping authors produce documents with open licenses, and we concentrate on employing open standards for the HTML output we create, we are positioned to help you easily create highly-accessible documents. There are some technical features which happen automatically, and there are some features which we make available for your use as an author. See [Section 6.21](#) for full details and ways you can make the HTML version of your document more accessible.

Chapter 4

Processing, Tools and Workflow

This chapter explains in full detail how to combine your source file with an XSL stylesheet to produce output. It expands on the simple example in [Chapter 2](#) and should also be read in conjunction with the chapter on the `mbx` script ([Chapter 8](#)).

4.1 Basic Processing

The executable program `xsltproc` implements Version 1.0 of the **eXtensible Stylesheet Language (XSL)**. This is a declarative language that walks the hierarchical tree of an XML source file, and for each element describes some output to produce before, and after, recursively processing the contained elements. (That is a simplified description.)

`xsltproc` is typically installed by default on Linux systems and as part of Mac OS. See the PreTeXt website for details for Windows systems. The most basic operation is to provide `xsltproc` with an XSL stylesheet from the PreTeXt distribution and an XML document of your creation that is valid PreTeXt. This is done at the command-line, inside of a terminal or shell. Describing command-line operations, along with file and directory management, is beyond the scope of this guide, so consult another resource if this is unfamiliar. So here is a hypothetical simple example:

```
rob@lava:~/mathbook$ xsltproc xsl/mathbook-html.xsl ~/books/aota/animals.xml
```

By default, `xsltproc` writes output to `stdout` (the screen), which you could redirect to a file, or you could use the `-o` switch to send the output to a named file. However, PreTeXt automatically writes to a file whose name is derived from the `@xml:id` attribute of the top-level `<book>` or `<article>` tag. If no such attribute is given the filename will be derived from `book-1` or `article-1`. All output is produced in whatever the current default directory is, so you will likely want to set this beforehand.

The `xsl` subdirectory of the PreTeXt distribution contains a variety of XSL stylesheets, which I will also refer to as **converters** or **conversions**. The ones that you will use as an author all have filenames of the form `xsl/mathbook-XXX.xsl`, where `XXX` is some indication of the output produced. Conversions to \LaTeX or HTML output are the two most mature converters.

Note that authors are not responsible for creating XSL stylesheets. Stock conversions are part of the PreTeXt distribution, and anybody is welcome to assume a source document is valid PreTeXt and create new conversions to process it to existing, or as yet unimagined, formats.

4.2 Modular Source Files

For a large project, such as a book, you will likely want to split up your source into logical units, such as chapters and sections. `xsltproc` supports an include mechanism that makes this possible. Let us suppose that your book on animals has a chapter on mammals with a section on monkeys. Then you need to do the following:

1. For the file containing the `<chapter>` tag for the chapter on mammals, place the attribute `xmlns:xi="http://www.w3.org/2001/XInclude"` on the outermost tag in the file.
2. Within the `<chapter>` element for the chapter on mammals, add the line `<xi:include href="monkeys.xml" />` to “pull in” the section on monkeys at that location. The `@href` attribute can point to a file in a subdirectory, but will be interpreted relative to the location of the file containing the mammal chapter element.
3. Add the switch `-xinclude` to your invocation of `xsltproc`, just after `xsltproc`, but before the filenames for the stylesheet and the master source file. Note that for some versions of `xsltproc` it might be necessary to use two dashes for the switch, `--xinclude`.

So now a typical invocation (using one dash) might look like

```
xsltproc -xinclude xsl/mathbook-html.xsl ~/books/aota/animals.xml
```

Note that when you invoke `xsltproc` the default directory can be far away from your source, and the processor will locate all the component files of your project through the relative file locations in the `@href` attribute. Several comments are in order.

- Begin small and start a project *without* using modular files. Modularizing seems to add a layer of complexity that sometimes obscures other beginner’s errors. So get comfortable with a single source file before branching out.
- I am forever forgetting the `-xinclude` switch. Empty output, or cryptic error messages, are your first clue to this simple, but common, mistake.
- The XML specification requires that a source file only contain a single outermost element. So for example, two `<chapter>` elements cannot go into the same file as simultaneous outermost elements.
- Any file that uses an `<xi:include>` element will need the `xmlns` declaration on the outermost element. So in our animal book example, the “master” file, which presumably includes several chapter files, would need this declaration on the `<mathbook>` element.
- In practice, there is not a lot to be gained by creating a subdirectory structure mirroring your modularization—all your source files can go into one big directory and the XML hierarchy will take care of the organization. I do sometimes like to name my files accordingly, so for example `chapter-mammals.xml` and `section-monkeys.xml`.

The sample book in `examples/sample-book` amply demonstrates different ways to modularize parts of a project (but in no way should be taken as best practice in this regard). This guide, in `doc/author-guide` is a simple example of modular source files, and might be a good template to follow for your book. See [Section 6.20](#) for some of the finer points of this topic.

4.3 Verifying your Source

A **schema**, in our case a RELAX-NG schema, is a formal specification of an XML vocabulary (the allowed tags and attributes), and how they relate to each other. So, for example, the restrictions that say you cannot nest a `<book>` inside of a `<chapter>`, nor can you nest a `<subsection>` in a `<chapter>` without an intervening `<section>`, are expressed and enforced by the schema. One of the beauties of the schema is that it is written using a very specific syntax and then there are tools that use a schema as input. In particular, a PreTeXt source file that conforms to the PreTeXt schema is said to be **valid**. You should strive to always, always, always have valid source files, and therefore you want to regularly verify that this is the case.

You can find the PreTeXt schema in the `schema` directory. The version we author and maintain is `pretext.xml`, which is used to create `pretext.rnc`, which uses the compact syntax of the RELAX-NG

specification. By providing the schema and your source to a program called a **validator** you can check if your source is valid, and if not, why. See [Chapter 5](#) for the details on doing this.

If you author source that is valid PreTeXt, then a conversion of your source to another format should succeed. And maybe in the future, somebody will create a new conversion to a new output format, and your source should still produce faithful output, with no extra effort from you. Think of the schema as a contract between authors of source files and developers of converters. This is different than performing a conversion and getting good-looking output—that can just be a happy accident and your source may not succeed with some other conversion.

We cannot stress enough the importance of setting up and performing regular validation and preventing many consistent errors of the same type. You will learn what elements are allowed where, and which are not, from the messages produced by validation errors. And when a conversion fails, or produces spectacularly incorrect output, validating your source should be your first reaction. Always.

The other beauty of a schema is that you can supply it to a text editor ([Section 1.2](#)) and then you will get context-sensitive help that greatly assists you in using only the tags and attributes that are allowed in a given location of your source. [XML Copy Editor](#) is the one editor like this we have tried, but we do not have extensive experience.

We have devoted an entire chapter ([Chapter 5](#)) to amplifying this introduction and providing more details, such as where to find details on installing a validator.

4.4 Customizations, String Parameters

There are some aspects of your output that are entirely divorced from the actual content, and are presumably all about how that content is presented. Two good examples are the size of the font used in L^AT_EX/PDF/print output, and the granularity of web pages in HTML output (by this we mean, is each web page a whole chapter, a whole section, a whole subsection?). Producing output with varying values of these parameters does absolutely nothing to change your content in any way, and so should not be a part of your source. Thus we provide values for these parameters on the command-line *at processing time*. They have become known as **stringparam** for a soon-to-be obvious reason.

Suppose you want to make a large-font version of your textbook for a student who has limited vision. Look inside the top of `xsl/mathbook-latex.xsl` and find the `latex.font.size` parameter. The preceding comments in this file suggest `20pt` is the maximum supported. So you would use a command-line like the following (possibly with `--xinclude`, etc.).

```
$ xsltproc --stringparam latex.font.size "20pt"
/path/to/xsl/mathbook-latex.xsl ~/books/aota/animals.xml
```

You can use as many `stringparam` as you like on the command-line (or in your scripts). The quotation marks are not strictly needed in this example, but if the value of the parameter has spaces, slashes, etc., then you need to quote-protect the string from the command-line processor, and either single or double quotes will work (and protect the other kind).

These parameters are documented in the XSL files themselves, principally `-common`, `-latex` and `-html`, and occur near the top. They assume sensible defaults for beginners, and error-checking is careful and robust. They will be easier to locate and use when we have the time to document them more carefully here in the Author's Guide.

One caveat for using these is that experience has taught us that some of the parameters we created early on really do affect your content. We will change some of these, but always provide a smooth upgrade path through deprecations, with little or no disruption to your workflow.

4.5 Customizations, Thin XSL Stylesheets

Stringparams ([Section 4.4](#)) are an easy way to effect global changes in the presentation of your writing. But putting ten of them on every command-line gets old and cumbersome fast.

You may also wish to customize your output in some stylistic way. This might be especially true for L^AT_EX/PDF/print output. For example, you might wish to have every chapter heading of your book in a nice

shade of light blue, with the title flush right to the margin, countered by a thick solid rule extending all the way right, to the edge of the paper. Notice that this does not affect your content, it is strictly presentation.

We have done several things to encourage such customizations. We have tried to put as much stylistic information as possible in the \LaTeX preamble and keep as much as possible out of the body. (There is always room for improvement on this score, please be in touch if you have a need.) For small adjustments the `latex.preamble.early` and `latex.preamble.late` stringparam are possible vehicles, though all the \LaTeX code to make light blue, flush-right rules is going to be messy on the command-line.

Instead, you can make a small XSL file, to use as input to `xsltproc`. The first thing it should do is import the stock PreTeXt file for the type of output you want to create. You can use an absolute path to the PreTeXt distribution (which will not be very portable), or utilize the `mathbook/user` directory and a relative path from there. The easiest thing to put in this file is elements like

```
<xsl:param name="latex.font.size" select="'20pt'" />
```

which is functionally equivalent to our example in [Section 4.4](#). Values given on the command-line supersede those given in an XSL file this way.

You can augment the \LaTeX preamble with as much \LaTeX code as you like in the following way.

```
<xsl:param name="latex.preamble.late">
  <xsl:text>% Proof environment with heading in small caps&#xa;</xsl:text>
  <xsl:text>\expandafter\let\expandafter\oldp\csname\string\proof\endcsname&#xa;</xsl:text>
  <xsl:text>\let\oldep\endproof&#xa;</xsl:text>
  <xsl:text>\renewenvironment{proof}[1][\proofname]{\oldp[\scshape #1]}{\oldep}&#xa;</xsl:text>
</xsl:param>
```

There are a variety of things you can do generally, by overriding the imported XSL templates to change behavior, but such modifications are beyond the scope of this guide.

4.6 Images and the `mbx` Script

We believe it is important to preserve a record of how diagrams and other graphics are produced. This can be easy when a graphics language is employed to describe the graphical elements, rather than creating a bit-mapped image with some other interface. So we have `<asy>`, `<latex-image-code>`, and `<sageplot>` for elements holding code to produce diagrams or images.

The upside to this is that small edits to the code can easily accomplish minor changes or corrections necessary for the images. The \LaTeX macros provided by an author can be used in the text *and* in a diagram, leading to greater consistency between the two. Finally, starting from source, we can do the best possible job of producing image formats that are compatible with the document output formats and which scale smoothly in PDFs and in web browsers.

The downside to this is that XSL is not a general purpose programming language, and so in particular, cannot call “helper” programs such as `asy`, `pdf \LaTeX` , and `sage`. The general strategy is to use XSL to identify and isolate the parts of a document that lie in the elements designed for graphics languages. A Python script, the `mbx` script, employs these XSL stylesheets and then feeds each image file to the appropriate helper program.

This script has a variety of options, so we document it fully in [Chapter 8](#).

4.7 Keeping Your Source Up-to-Date

Once in a while it becomes necessary to adjust how the PreTeXt vocabulary is arranged, which involves adding or removing elements or attributes, or changing their behavior. When elements or attributes are removed, or their relationships with other elements change, we say that certain items or behaviors are **deprecated**. Fortunately, we can often automate the changes.

When there is a deprecation, a warning is added so that any conversion will report the presence of the old use in the console. Sometimes we can preserve the old behavior, so there is no rush to make changes to

your source. Sometimes a change needs to be more urgent. And frequently old behaviors do not get updates or bug-fixes. Our warnings provide advice and information about what you need to do. There are also announcements on public discussion groups, clearly marked as deprecations. Also, the schema will change as part of any deprecation, so the old elements or old use will be reported.

The rest of this section describes a tool you can use to automate the process of adjusting your source when there are deprecations. Generally, there is an XSLT stylesheet which will convert your XML source to another XML source file, fixing many of the deprecations automatically. However, it is the nature of XML processing that your source file will undergo some cosmetic changes. For example, the order of attributes is never relevant, so an XML-to-XML conversion is free to re-order the attributes of an element, perhaps different from how you like to author them.

So you have two choices:

- Process your source with any of the provided conversions and edit by hand until the warnings all disappear.
- Run the deprecation-fixing conversion and accept the changes in XML formatting. (Read on for more specifics about these changes.)

You perform this conversion using `xsl/utilities/fix-deprecations.xsl` on an XML source file in the usual way. By default, output appears on the console, so you will want to specify an output file, for example with the `-o` flag of `xsltproc`. You will discover a safety measure that requires you to also use a parameter, which you can pass in to `xsltproc` with the `-stringparam` command-line argument.

One choice of the parameter will result in just “copying” your source file and making all the cosmetic source format changes (we refer to this here as **normalization**). This might be a useful thing to do first, all by itself, either as a first step, or an exploratory experiment. The other value of the parameter will actually make changes, and report some information about progress.

Here are some notes:

- Be sure to experiment on copies of your source in a scratch directory. Send your output to another directory. When finished, use a diff tool to inspect the actual changes made. You can record your eventual changes using revision-control ([Appendix D](#)).
- Do not enable `xinclude` processing or else your several files will all be merged into one as output and any modularity of your source will be lost.
- Every single bit of indentation and whitespace in your source will be preserved, except perhaps for some blank lines near the top of your source files, and limited exceptions noted below.
- Attributes will likely be re-ordered, with normalized spacing between them.
- Empty elements will have any spaces removed from the end of the tag.
- Elements with no content may be written with a single empty tag.
- CDATA sections will be converted to text acceptable to the XML parser. In other words, the CDATA wrapper will be removed and dangerous characters (`&`, `<`, `>`) will be replaced by equivalent entities (such as `&`). If you have many matrices expressed in $\text{L}^{\text{A}}\text{T}_{\text{E}}\text{X}$ and wrapped in a CDATA, this might be a big change.
- The output files will be labeled as having UTF-8 encoding.
- It could be necessary to run this conversion more than once if deprecations build on one another. In other words, we do not update specific conversions, but rely on regular use to keep source up-to-date.
- It should be safe to run this conversion repeatedly, even after new deprecations are added. In fact, it is encouraged.
- The PreTeXt source file `examples/sample-errors-and-warnings.xml` is intentionally full of lots of bad stuff. You can experiment with it, should you want to see interesting things happen. We have already performed the normalization step, so you can concentrate on substantive changes.

To process a directory with multiple source files, I would proceed as follows. First make three temporary directories, `/tmp/original`, `/tmp/normal`, `/tmp/clean`, and copy my source files into `/tmp/original`. Then, using a BASH shell, and inputting the command all on one long line,

```
rob@lava:/tmp/original$ for f in *.xml; do xsltproc -o ../normal/$f -stringparam fix normalize
/home/rob/mathbook/xsl/utilities/fix-deprecations.xsl $f; done
```

This will loop over every XML file in the current working directory, `/tmp/original`, running the normalization conversion on each file, with the output files using the same filename, but now being placed in the `/tmp/normal` directory. If you change to the `/tmp` directory, then you can compare the results. I like to use the `diff` utility provided by `git`.

```
rob@lava:/tmp$ git diff original normal
```

Or, try this for a view that might be more informative.

```
rob@lava:/tmp$ git diff --word-diff original normal
```

You may only do the above once, on your first use of this conversion stylesheet. You will see how your style of authoring XML will undergo some minor changes. We can repeat the above to actual make the changes necessary due to PreTeXt deprecations. Make `/tmp/normal` the working directory.

```
rob@lava:/tmp/normal$ for f in *.xml; do xsltproc -o ../clean/$f -stringparam fix all
/home/rob/mathbook/xsl/utilities/fix-deprecations.xsl $f; done
```

And as above, you can now compare the `normal` and `clean` directories to see actual changes. If you are satisfied with the changes, you can copy the files in the `clean` directory back onto your source files. If you are using revision-control (you are, aren't you?) then you can make a commit that holds these changes ([Appendix D](#)). Or maybe even make two commits, one from the normalization step, and a second with the substantive changes.

4.8 File Management

PreTeXt, at its core, is the formal specification of the XML vocabulary, as expressed in the DTD ([Section 4.3](#)). We have provided converters to process source files into useful output. However, we have not yet built a point-and-click application for the production of a book. So you need to take some responsibility in a large project for managing your files, both input and output. We have tried to provide flexible tools to make an author's job easier. The following is advice and practices we have successfully employed in several book projects.

Source I am fond of describing my own books with an initialism formed from the title. So *A First Course in Linear Algebra* becomes FCLA, and in file and directory names becomes `fcla`. So I have a top-level directory `books` and then `books/fcla`, but this directory is not the book itself, this is all the extra stuff that goes along with writing a book, much of it in `books/fcla/local`. The actual book, the part everybody sees with an open license, lives in `books/fcla/fcla`. This subdirectory has files like `COPYING`, which is a free software standard for license information, and `README.md` which is a file in the simplistic Markdown format that is picked up automatically by GitHub and displayed nicely at the book's repository's main page. Subdirectories include `src` for the actual XML files, `xsl` for any customizing XSL ([Section 4.5](#)), and `script` for shell scripts used to process the book (see below).

I do not use any additional directory structure below `src` to manage modular files for a book, since the XML and the `--xinclude` mechanism manage that just fine. I see little benefit to extra subdirectories for organization and some resulting inconvenience. I do typically have a single subdirectory `src/images` for raster images and other graphics files.

I believe it is critically important to put your project under revision control, and if licensed openly, in a public GitHub repository. So the `books/fcla/fcla` directory and all of its contents and subdirectories is tracked as a `git` repository and hosted on GitHub. Because this directory is *source* I try very hard to *never* have any temporary files in these directories since I do not want to accidentally incorporate them into the

git repository. As a general rule-of-thumb, only original material goes in this directory and anything that can be re-created belongs outside.

A tutorial on git would be way outside the scope of this guide, but Beezer and Farmer *have* written *Git For Authors*, so perhaps look for that.

Image Files Some images are raster images (e.g. photographs) that are not easily changed, and perhaps unlikely to be changed. Other images will come from source-level languages via the `mbx` script. For your convenience, this script has a command-line option that allows you to direct output (graphics files) to a directory of your choice.

In the early stages of writing a book, I put image files produced from source code in a directory outside of what is tracked by git. It is only when a project is very mature that I begin to include completed graphics files into the `src/images` directory for tracking by git.

Build Scripts When you have a mature book project, the various files, processing options, and a desire for multiple outputs can all get a bit confusing. Writing simple scripts is a good idea and the investment of time doing this early in a project will pay off through the course of further writing and editing. The particular setup you employ is less important.

I have fallen into the habit of using the `make` program. It allows me to define common variables upfront (such as paths to the PreTeXt distribution and the main directory for the project it applies to). Then I can easily make “targets” for different outputs. So, for example I typically go `make pdf` or `make html` to produce output, and have simple companion targets so that I can go `make viewpdf` or `make viewhtml`. Other targets do things like checking my source against the DTD (Section 4.3). I have split out the variable definitions in a way that a collaborator can join the project and simply edit the file of definitions just once to reflect their setup, and still participate in future upgrades to the script by pulling from GitHub and not overwrite their local information.

My use of `make` is a bit of an abuse, since it is really designed for large software projects, with the aim of reducing duplicative compilations and that is not at all the purpose. You could likely have exactly the same effect with a shell script and a case (or switch) statement.

My general strategy is to assemble all the necessary files into a temporary directory (under `/tmp` in Linux) by copying them out of their permanent home, copy customizing XSL into the right place (typically `mathbook/user`), run the `mbx` script as necessary and direct the results to the right place, and finally copy results out of the temporary directory if they are meant to be permanent. Interesting, an exception to staging all these files is the source of the book itself which is only read for each conversion and then not needed for the output. So you can just point directly to a master file and the `xinclude` mechanism locates any other necessary source files.

A good example of this general strategy is the use and placement of image files for HTML output. It is your responsibility to place images into the location your resulting HTML files expect to locate them. By default, this is a subdirectory of the directory holding the HTML files, named `images`. You will want to copy images, such as photographs, out of your main source directory (`src/images?`). But you may be actively modifying source code for diagrams, and you want to re-run the `mbx` script for each run, and make sure the output of the script is directed to the correct subdirectory for the HTML output. Running the `mbx` script frequently can get tiresome, so maybe you have a makefile target `make diagrams` that updates a permanent directory, outside of your tracked files in the repository, and you copy those files into the correct subdirectory for the output. That way, you can update images only when you are actively editing them, or when you are producing a draft that you want to be as up-to-date as possible. As a project matures, you can add images into the directory tracked by git so they are available to others without getting involved with the `mbx` script.

We did not say it would be easy, but we feel much of this sort of project management is outside the scope of the PreTeXt project itself, while in its initial stages, and existing tools to manage the complexity are available and documented. (We *have* been encouraged to create sample scripts, which we may do.) Just remember the strategy: stage necessary components in a temporary directory, build output in that directory, copy out desired semi-permanent results, and limit additions to the source directory to that which is original, or mature and time-consuming to reproduce.

4.9 Testing HTML Output Locally

Certain complicated parts of HTML output will not always function when you look at PreTeXt output by just opening files in your web browser. These include knows, Sage cells, and YouTube videos. This is a consequence of security policies and so will vary from browser to browser. A solution is to run a web server on your own machine, which is much easier than it sounds. The one prerequisite is that you have Python installed, as is normally the case on any Linux or Mac computer. On Windows, you may need to install Python yourself, but you may eventually need it for the `mbx` script anyway ([Chapter 8](#)). The following has been tested on Ubuntu Linux 16.10 and MacOS 10.12 (2017-08-06).

Python 2 and Python 3 are different in some regards, and that is the case here. Your system may have commands `python2`, `python3`, and/or plain `python`. Experiment with variants of the following two commands. First, at a command-line, set your working directory to be the location of a directory containing the HTML files you want to test.

```
python3 -m http.server
```

```
python2 -m SimpleHTTPServer
```

Use `--help` if you want to see the (limited) options for configuration. Then go to the address bar of your browser and use

```
http://0.0.0.0:8000/index.html
```

to actually view the files from a web server. Running the Python command should tell you which address to use (the `0.0.0.0`) and your project might not have an `index.html` file, so adjust accordingly.

Official documentation: [Python 3](#) and [Python 2](#).

You may also be able to configure your `hosts` file so that this webserver looks like it lives somewhere else. Clues at bowerwebsolutions.com.

4.10 Doctesting Sage Code

Adding computer code to your textbook is a tricky proposition. You can propose that it is merely an illustration, and not meant to have all the necessary details, or you can make it exact, correct and executable, and then risk inevitable changes to render your code obsolete. At least you have the option of editing and reposting online versions quickly and easily.

One of our main motivations for this project was mixing in code from the powerful, open source, mathematical software project, Sage ([Section 3.14](#)). When you add example Sage code to illustrate mathematical ideas, you are then encouraged to also include expected output in the `<output>` element. Here comes one of the powerful advantages of XML source and XSL processing.

The `mathbook/xsl/mathbook-sage-doctest.xsl` stylesheet, used in the usual way, will create one (or several, depending on the `chunk.level` stringparam) file(s), in *exactly* the format Sage expects for automated testing. So all your words are gone, and all your Sage input and output is packaged so Sage can run all the `<input>` and compare the results to the expected `<output>`.

We have many years' experience testing hundreds of non-trivial Sage examples from textbooks, for linear algebra and abstract algebra. Roughly every six months, we discover ten to twenty examples that fail. Frequently the failures are trivial (usually output gets re-ordered), but some are significant changes in behavior that leads us to re-word surrounding guidance in the text, and in a few cases the failures have exposed bugs introduced into Sage. It has been relatively easy to do this maintenance on a regular basis, and if it had not been done, the accumulated errors would be enough to greatly degrade confidence in the accuracy of the examples.

Exact details for this process can be found in [Section 6.19](#). Note that Sage is really just a huge Python library, so it might be possible to test pure Python code with this facility, but we have not tested this at all. Similar support for other languages can be considered if requested for use in a serious project.

4.11 Author Tools

The general stringparam `author-tools` may be set to `yes` to activate special handling of the `<todo>` element, the `@provisional` attribute of an `<xref>` element, and notation and index entries. The L^AT_EX-specific stringparam `latex.draft` set to `yes` will automatically activate the previous features, in addition to a few others appropriate to the printed page. We have an XSL stylesheet that dumps every `<todo>` and every `@provisional` attribute to the screen as a simply-formatted text report, but it is not public now.

The intent here is to make a rough draft, for an author or collaborator only, reporting as much as possible that is incomplete, pending or hidden in the usual output. But none of this is carefully supported. Requests for improvements, and overall comments, from working authors are invited. They will help to make this feature more useful for everybody.

4.12 Building Output in CoCalc

CoCalc cocalc.com has *all* the tools you need to author with MathBook XML. You will need an upgrade from a subscription to allow Internet connectivity, but at a minimum a colleague with a paid plan can spare you one, they are plentiful and meant to be shared.

- Text editor: reasonably good, partially XML syntax-aware.
- `git`: installed (so clone PreTeXt).
- L^AT_EX: installed with many additional packages.
- Python: installed, necessary for `mbx` script.
- PDF viewer: handed off to your browser.
- HTML viewer: convert to the “raw” URL and you can preview.
- HTML server: nope. Zip up output and host elsewhere.

Chapter 5

PreTeXt Vocabulary Specification

This Author’s Guide, along with the sample article and sample book distributed with the PreTeXt source, provide a wealth of examples of how to author in PreTeXt. However, at some point, you will undoubtedly encounter a situation where some of your text fails to appear in your output or `xsltproc` produces an error. Those are good moments to start investigating the formal specifications of the PreTeXt vocabulary, as most likely you tried to use something in a way incompatible with those specifications. This chapter will help you understand and work with the formal specification of PreTeXt.

5.1 RELAX-NG Schema

A **schema** is a set of patterns which describe how the elements of a language may be combined. The PreTeXt vocabulary is described by a RELAX-NG schema, which is included in the PreTeXt distribution. (RELAX-NG stands for “REgular LAnguage for XML Next Generation” and is pronounced “relaxing”.) In general terms, the schema tells you which elements are available, which attributes they may carry, and which other elements they may contain. You can then infer where you can place an element. The schema also indicates if an element is required or optional, if it may be repeated, or if it needs to appear in a prescribed order with other elements, and may limit attribute values.

Besides providing a concise formal description of the PreTeXt vocabulary, your XML source and the RELAX-NG schema can be provided to tools which will automatically **validate** your source against the formal definition. The best validators will provide accurate and helpful messages about errors in your source. Further, some editing tools will use a schema to provide context-sensitive assistance on available elements and attributes as you write, sparing you typographical errors, misplaced elements, and the need to frequently context-switch in order to consult reference material.

The schema does not tell you anything about how an element or attribute will behave. But hopefully there is not much ambiguity about the behavior of the content of a `<title>` element nested within a `<chapter>` element. You would not be surprised to see that content duplicated in the Table of Contents of a book. The purpose of this guide, and other documentation, is to help you understand what to expect. It is better to think of the schema as a contract between you and the developers of conversion tools. If your source conforms to the schema, then a conversion tool will produce reasonable output that conveys the structure and meaning of your writing. Twenty years from now, when GEF is the dominant document format, a conversion of your source will preserve your meaning, while also taking advantage of the amazing features of GEF. (GEF stands for “Great Electronic Format of the Future”.)

In summary, the RELAX-NG schema

- is the formal specification of the PreTeXt vocabulary,
- is the key input to validation,
- can be incredibly helpful in the editing process, and
- provides guidance to implementors of conversions.

As such, we are very deliberate about changes, and hope over time to make changes only very rarely.

5.2 Versions of the Schema

The schema is born within a PreTeXt document, `schema/pretext.xml`, where surrounding text provides documentation and guidance on implementation. The literate programming support in PreTeXt (see `<<literate programming documentation>>`) is used to produce a file, `schema/pretext.rnc`, which is a RELAX-NG specification in compact syntax. As the literate programming support improves from 2017-07-21, HTML and PDF versions will be made available on the PreTeXt website as documentation. We provide some guidance below on reading the compact syntax.

The compact syntax is a faithful representation of the more verbose XML syntax. And vice-versa, so it is possible to translate back-and-forth between the two syntaxes. In practice, we convert the compact version to the XML version, producing a file `schema/pretext.rng`. Some tools require this latter (100% equivalent) version. We perform this conversion with `trang`, an open source program written by James Clark, one of the authors of RELAX-NG. (`trang` stands for “TRAnslator for relax NG”.) The compact syntax is often indicated as RNC and the XML syntax is often indicated as RNG.

XSD (XML Schema Definition), from the World Wide Web Consortium (w3C), is an alternative to the RELAX-NG syntax. It cannot express as many situations as the RELAX-NG syntax, but we have created the PreTeXt schema in a way that `trang` can convert to an XSD specification without introducing any more-permissive “approximations.” But the XSD version seems to have a few small inaccuracies, and in particular should not be used for validation. That said, `schema/pretext.xsd` may be useful for tools (e.g. editors) that require it.

The files `pretext.xml`, `pretext.rnc`, `pretext.rng`, and `pretext.xsd` are all provided in the `schema` directory under revision control, and are updated by the `schema/build.sh` script when changes are made to `pretext.xml`. So as an author, you do not need to install or run `trang` and should just link to the (continually updated) copies in your `mathbook` directory.

We once provided a **document type definition** (DTD) as a description of the PreTeXt vocabulary. [Mitch Keller](#) wrote an excellent initial version of this chapter to help others understand similar principles in the context of the DTD. However, the DTD was not sufficiently flexible to handle elements that behave differently in different locations, such as an `<introduction>` to a `<chapter>` versus an `<introduction>` to an `<exercisegroup>`. As further evidence, `trang` will knowingly refuse to convert the PreTeXt schema to a DTD since the DTD syntax is not sufficiently expressive to describe PreTeXt.

If you are interested in conversions, more tools can be found at relaxng.org and we have information on installation in [Appendix C](#). We would be pleased to learn more about authors’ experiences with other converters.

5.3 Reading RELAX-NG Compact Syntax

The compact syntax might remind you of Java or C++ syntax. We do not provide a tutorial here, but do provide some hints on the various delimiters and special symbols, which may make it fairly easy to see your way through to the meaning. The fundamental object of the schema is a **pattern**, and **named patterns** can be reused in order to reuse common patterns and modularize the description. One approach to validation is to remove portions of your source that match required patterns until only optional material remains. Notice that if you were to chase your way through substituting the named patterns with their employment, you would have a single (large) pattern which every possible PreTeXt document would match, and by definition an XML document that does not match is not PreTeXt. (OK, that is a slight exaggeration, see [Section 5.6](#).)

element foo { }	Define <foo> and children
attribute bar { }	Define @bar and values
text	Sequence of characters (any length)
mixed { }	Mixed-content, characters interleaved in pattern
	Exactly one (required)
+	One or more (required)
*	Zero or more (optional)
?	Zero or one (optional)
,	Sequence, in prescribed order
	Choice
&	Sequence, any order
()	Grouping
=	Define named pattern
=	Accumulate named pattern as a choice

Table 5.3.1: RELAX-NG Compact Syntax Summary

5.4 Validation

We cannot stress enough the importance of validating your source early and frequently. Error conditions and messages can be built into processing (we have some anyway), but they are much better accommodated by tools built for just this purpose. If your processing with `xsltproc` suddenly fails, or if chunks of your content fail to materialize, it is highly likely that a validation check will tell you where the problem lies. If you integrate regular checks into your workflow, then sudden problems can be traced to recent changes. (Perhaps paired with using `git bisect`, in the extreme. You are using revision control, aren't you?)

We use `jing` for validation, an open source companion to the `trang` converter described above. As a Java program, it should be cross-platform. It is also packaged for Debian and Ubuntu Linux. It provides messages keyed to the line number and character number of your source, and the messages are very clear and informative. See notes on installation in [Appendix C](#). We would be pleased to learn more about authors' experiences with other validators.

You might get a lot of error messages the first time you use `jing`. If so, it might be that many of them are the same situation. If you pipe the output of `jing` through `sort -k 2` then the output will group similar messages together.

If you use `xsltproc` as your XSLT processor, then you likely automatically also have the `xmllint` program, which will perform validation with RELAX-NG schema. Our experience is that it bails out at the first warning, or at least does not process the remainder of the current subtree, and that the error messages are often very misleading. We will not support questions about validation based on output from `xmllint`.

5.5 Schema Browser

We use the DocFlex/XML [XML Schema Documentation Generator](#) to automatically produce hyperlinked documentation of the schema as part of the online documentation at the PreTeXt website, located at mathbook.pugetsound.edu/doc/schema/. Because this is produced from the XSD version of the schema, it will reproduce the small inaccuracies mentioned above. But it is still a very convenient and informative way to explore the schema, or use it for reference. If you know of a similar tool of the same quality, but which documents RELAX-NG schema, a report would be greatly appreciated.

Do not be intimidated by the list of roughly 300 elements in the left navigation panel. Many are configuration options, many are special-purpose, and many you will never use. (Someday we will do lexical analysis on a substantial range of PreTeXt texts to see just which elements do get used most frequently). Instead, scroll down to the 70 or so "Element Groups". These are thematic bundles of related elements, named to help you locate them later. The right panel will list the elements near the top as part of the "Complex Content Model." Just below you will see the "Known Usage Locations" which list places every element in the group

may appear. Similarly, if you explore a particular element, you can see the pattern describing the attributes and elements allowed as children, and lists of the possible parents.

The XML Schema Documentation Generator is a commercial program, but provides a free license allowing minimal customization and embedding promotion in the output. (Thank-you, Filigris Works!) In particular, as an author you should not need to install or use this program.

5.6 Schematron Rules

Schematron’s inventor, Rick Jelliffe, described [Schematron](#) as “a feather duster to reach the parts other schema languages cannot reach.”

We will augment the RELAX-NG schema with Schematron rules, and migrate source-specific error messages and special conditions away from the XSLT processing step. It appears possible to integrate Schematron rules into the PreTeXt document describing the schema and to conduct processing with existing tools (i.e., `xsltproc`).

5.7 Editor Support for Schema

We collect summary information about editors that make use of schema. See [Appendix B](#) for more specific information, links, etc..

Editor	Formats	Notes
emacs	RNC	Schema-sensitive editing, open source
XML Copy Editor	RNG, XSD	Validation, “tag completion”, open source
oXygen	RNC, RNG	Validation and completion, commercial

Table 5.7.1: Schema Support in Editors

Chapter 6

(*) Topics

Careful descriptions arranged into topics. Unwritten sections provide a temporary outline.

6.1 (*) Exercises, Inline and Sectional

6.2 (*) Lists of Works Cited (References)

6.3 Verbatim and Literal Text

This section expands on parts of [Section 3.13](#). For descriptions of more involved uses, such as program listings and console sessions, see [Section 6.11](#).

The tags described here contain *only raw characters*. By that we typically mean the first 128 characters of the ASCII code. Unicode characters are likely to migrate to HTML output just fine, but results for L^AT_EX output will be variable. The restriction to character data has two consequences. First, any markup mistakenly included will have its content silently ignored and dropped. Second, you need to observe the rules on special characters and escaped characters for XML for literal text, which are mercifully simple.

In your source, use `&` for an `&`, and use `<` and `>` for `<` and `>`. Otherwise, every other ASCII character will render faithfully across all possible formats.

6.3.1 Short, Inline, Verbatim Text

The `<c>` tag is a mnemonic for “code”, but is really meant to be any chunk of literal characters that you want to emphasise that way. So a “typewriter” font of fixed-width characters would be a typical presentation. It is meant for use within a sentence or caption (“inline”) so its use is limited to those situations, and others that are similar, such as a title or a cell of a table. Typically these pieces of text do not hyphenate words, and so can lead to spillover into a right margin. In these situations, consider options below for longer pieces of text.

6.3.2 Longer, Inline, Verbatim Text

For longer pieces of verbatim text, use the `<cd>` tag, which is short for “code display”, analogous to the `<md>` for mathematics. It is used within sentences of a paragraph and will be presented with a vertical break above and below, but without interrupting the paragraph. Because of the display presentation, it cannot be used other places, such as a `<title>`, where a vertical gap is not appropriate. All of the previous discussion about special characters applies for this tag.

You have two options in use. You may author inline with the rest of a sentence, with no extra newlines or whitespace before, after, or within the content. The result will be a single displayed line.

Or you may structure the content using one, or more, of the `<cline>` tag, which is meant to be similar to the `<line>` tag used elsewhere. You should still take care to not place any extra whitespace before or after

the `<cd>` element, but inbetween the `<cline>` you may use as much visual formatting of your source as you wish, especially if you like your source to mirror your output.

6.3.3 Blocks of Verbatim Text

If you want to isolate large chunks of verbatim text outside of paragraphs, the `<pre>` tag is the one to use. It can be used as a peer of paragraphs (and other structures) as a child of a division, or it can be placed into a `<listing>` to receive a caption, title and number.

You can structure the contents with `<cline>` in exactly the same manner as for `<cd>`. But you may find this tedious. Instead, you can make the content of `<pre>` a sequence of lines separated by newlines. So that you can preserve the indentation of your source, the line closest to the left margin is taken to actually be the left margin, and a corresponding amount of leading whitespace will be removed from every line. This will work well if you recognize two caveats. First, results will be unpredictable if you mix spaces and tabs for indentation. Sticking with spaces is best. Second, if your first characters of content immediately follow the `<pre>` tag then there is no leading whitespace and it is as if that line is already at the left margin. Then subsequent indentation may seem too severe to you.

As previously mentioned, [Section 6.11](#) discusses the `<console>` and `<program>` tags which are more specific, and hence more capable. Review the possibilities before you decide between `<pre>`, `<console>`, and `<program>`.

6.4 Cross-References and Citations

When you read a novel, you would likely read it cover-to-cover (in one sitting?) and then put it away and never read it again. But for a textbook, you may read cover-to-cover, but you may also frequently skip around, especially at exam time. And once read, it might become a reference work for you, since you know it so well. So years later you might come back looking for something. Cross-references help with all this, so use them liberally. Recognize that an index is really just a specialized way to provide an abundance of cross-references.

It is a two-step process to make a cross-reference.

1. Put an `@xml:id` attribute on any element you think you might want to reference later. Be organized about the values of these attributes, and in particular do not number them, as this has no place in your source, and you do not want to maintain the changing numbers over the life of your project. See the advice in [Section 3.3](#) about banned characters. Some elements do not accept this attribute because the element has nothing to identify it (no number, no title). Typically these are **containers** like `<sidebar>` or `<statement>`. In these cases, put the attribute on the closest enclosing element.
2. To make a cross reference, you create an `<xref />` element with a `@ref` attribute with the same value as `@xml:id` attribute on the element you want to reference.

Simple. It is meant to be, so you can use it liberally. But we also know authors want some flexibility.

By default, a cross-reference will visually be text like Theorem 5.2. Depending on your output format, it may have various devices to help you locate that theorem. Maybe a page number, or it is a hyperlink, or the whole theorem is the content of a knowl. You can change the default look of cross-references by setting the `@text` attribute in `docinfo/cross-references`. But you can also change the visual appearance of a cross-reference on a case-by-case basis. Add a `@text` attribute to your `<xref />` element to override the document-wide setting. The first column of this table lists the possible attribute values, either document-wide, or on a per-cross-reference basis. The second column has live cross-references to a section of an earlier chapter (that is far away). The third column has live cross-references to another section of this chapter (which is close by). For the fourth column, we have placed content (“Extra”) into the `<xref>` element as an override of, or addition to, some of the text for the cross-references of the preceding column. Study the table and then read some more explanation following. Note that `type-hybrid` is the default.

@text	Far Away	Close By	With Content
type-local	Section 4	Section 5	Extra 5
type-global	Section 3.4	Section 6.5	Extra 6.5
type-hybrid	Section 3.4	Section 5	Extra 5
local	4	5	Extra 5
global	3.4	6.5	Extra 6.5
hybrid	3.4	5	Extra 5
phrase-global	Section 4 of Chapter 3	Section 5 of Chapter 6	Warning
phrase-hybrid	Section 4 of Chapter 3	Section 5	Warning
title	Titles	Divisions	Extra

Table 6.4.1: Cross-reference visual text styles

Note that `local/global` describes the uniqueness of the number (and is affected by your choice of numbering schemes), while `type` refers to an automatic prefix of the number. The text of the type will vary according to the document’s language. If a cross-reference and its target are close to each other, a number like 5.8.2.4 might be overkill, when just a 4 would suffice. A `hybrid` scheme will use the shorter number whenever it makes sense. Finally, there are two `phrase` schemes, and it should be clear what text `title` will produce (though realize there must be a title for the object, possibly a default provided by PreTeXt).

You can also override the text used in a cross-reference link. You do this by providing content to the `<xref>` element. In other words, do not use an empty tag, but put some (simple) text in the element. Generally, this additional text becomes a prefix of a number, a replacement of a type, or a replacement of a title. It is better to use these overrides, since in electronic formats, the text of the override will be incorporated into the “clickable” portion of the resulting link, making a larger item to hit.

Here are careful examples, where we have provided the content “Division” in the live examples. The list is not exhaustive. Note that overriding a title provides a way to provide any text you would like.

@text	Example
'global'	Division 6.4
'type-global'	Division 6.4
'title'	Division

Table 6.4.2: Cross-reference text overrides

Citations, which are cross-references to `<biblio>` elements behave the same way, but will always visually look like [23]. References to equations (`<men>` and `<mrow>` elements) will visually look like (4.2), where the type is implied by the parentheses. Notice that you cannot cross-reference an `<me>` (no number) or `<md>` (just a container).

Further, there are some variant formats.

- Replace `@ref` by `@provisional` and give it a value with some simple text like `subsection on eagle habitat` and you will get reminders that once you write this future subsection you need to link it in right here. This is just a convenience for authors during the early stages of a writing project.
- Replace `@ref` by the pair `@first` and `@last`. Provide attribute values just as you would for `@ref`. The code will check that the targets have the exact same tag, and that the order is correct. You will get a link that looks like a range, separated by an en-dash. As a link, only `@first` will be used for the linking mechanism (i.e., one link is generated, not two). Experiment with `@text` and content overrides.
- The `@ref` attribute may be a list of `@xml:id`, separated by commas or by spaces. Then you will get back a list of cross-references. This is meant for a list of citations, producing a look like [5, 9, 22], but it makes no restriction to this case. Use it generally, but it is unlikely to get any more capable. If you want a different list, just use multiple `<xref>` and format as you desire.

You can create many different combinations with the text options and the variants. Here is one example. You want to say [Chapters 1–5](#). As a range you use the variant with two references. You would get “Chapter” out front automatically with the `type-global` scheme, but a plural form makes more sense. So you use that text as an override. We could use either `type-global` or `global` to get the same text, and possibly `type-hybrid` depending on the place where you built the cross-reference. So possibly, one of these schemes might be your document-wide setting and you do not need to specify it now. Here is what we just used:

```
<xref first="start-here" last="schema" text="global">Chapters</xref>
```

You can place a cross-reference into a `<title>` element, but a particular conversion is free to simply render it as text, and not as an active link.

Finally, there is fairly robust error-checking to protect against typographical errors in the attribute values that need to match up for all this to work. Also, there is a check that the `@xml:id` are unique. But all this checking happens at processing-time, not at the validation step. Any suggestions for improvements that make these checks even more robust are welcome.

Note 6.4.3 (Best Practices). With numbering schemes for divisions, theorems, figures, equations, and citations, along with nine different text styles, plus variants, per-cross-reference settings, and text overrides, there are a lot of combinations. Likely you can create some fairly ugly cross-references. Use the flexibility sensibly.

6.5 Divisions

A **division** is a structured component of a book or article that would be recognized by most any reader. They are essential to the organization of a PreTeXt project. Notice that we use the generic term division, since a `<section>` is just one example of a division.

divisions are `<book>`, `<article>`, `<part>`, `<chapter>`, `<section>`, `<subsection>`, `<subsubsection>`, and `<paragraphs>`. Their use is fairly intuitive, though there are some restrictions, so please read on.

A `<book>` must contain at least one `<chapter>`, which may contain `<section>`, `<subsection>`, and `<subsubsection>`. The tag `<part>` is planned for books, between `<book>` and `<chapter>`. It will function in two user-selectable ways: structural (e.g. numbering will reset), or decorative (merely inserting a decorative page between two chapters and sectioning the Table of Contents).

An `<article>` is simpler and shorter than a book. It might be really simple and have no divisions at all, or it may have `<section>`s. It cannot have `<chapter>`s, as that would be a `<book>`. Within a `<section>`, `<subsection>`s and `<subsubsection>`s may follow.

Divisions must nest properly and may not be skipped. So a `<section>` cannot contain a `<chapter>` and a `<subsection>` may not be contained in a `<chapter>` without an intervening `<section>`.

A division *must* contain a `<title>`, and may contain one or more index entries (see `<<topic-index>>`), which should appear before anything else. Any division may be unstructured, with just a sequence of **top-level content** such as paragraphs, figures, lists, theorems, etc. Or a division may be structured, and in this case it must follow a prescribed pattern. There may be a single, optional `<introduction>`, filled with top-level content, followed by a sequence of at least one of the appropriate divisions, ending with a single, optional `<conclusion>`, filled with top-level content. It is an error to begin with a run of top-level content inside a division and then begin to use divisions. (The solution is to make the initial content an `<introduction>` and/or one or several divisions.)

There are exceptions to the above. For one, `<paragraphs>` is an anomalous division, as a sort of lightweight sectioning command. It may appear in any division, at any location within a division, it may not be divided further (it is a leaf of the document tree), it never gets a number, and its title is formatted in a subsidiary way. I especially like to use this in a two- or three-page `<article>` that has no other divisions at all. Typical presentation has the title in bold, without much change in font size (if at all), inline with the first paragraph, and perhaps a bit of vertical space as it begins and ends. Despite the name, it may contain more than just paragraphs, so may contain any top-level-content that would go in any other division.

Two other anomalous divisions are `<exercises>` and `<references>`. These can function as a further division of any other division. So for example, an `<exercises>` could be a peer of several `<section>`s, contained within a structured `<chapter>`, and in this case would behave like the other `<section>`s with

regard to numbering and presentation. Detail on allowed content and its behavior are in [Section 6.1](#) and [Section 6.2](#), respectively.

6.6 Mathematics

As mentioned in the overview, [Section 3.5](#), we use L^AT_EX syntax for mathematics. In order to allow for quality display in HTML, and other electronic formats, this limits us to the subset of L^AT_EX supported by the very capable [MathJax](#) Javascript library. Generally this looks like the `amsmath` package maintained by the American Mathematical Society at their [AMS-LaTeX page](#). For a complete and precise list of what MathJax supports, see the [MathJax Supported LaTeX commands](#) page.

6.6.1 Inline Mathematics

Use the `<m>` to place variables or very short expressions within a sentence of a paragraph, the content of a `<title>`, a `<cell>` of a table, a footnote, or other similar locations of sentence-like text. You can't cross-reference this text, nor make a knowl with it. Though you can typically cross-reference a containing element.

Do not use L^AT_EX-isms like `\displaystyle` to try to end-run the inline nature. It will just lead to poor results.

6.6.2 One-Line Display Mathematics

The `<me>` element can be used for longer expressions or a single equation. Typically you will get vertical separation above and below, and the contents will be centered. See below about concluding periods (and other punctuation), and alignment. The `<men>` variant will produce a numbered equation, and therefore with a provided `@xml:id` attribute, can be the target of a cross-reference (`<xref>`).

6.6.3 Multi-line Display Mathematics

We begin with a pure container, either `<md>` or `<mdn>`. The former numbers no lines, the latter numbers every line. Within the container, content, on a per-line basis, goes into a `<mrow>` element. You can think of `<mrow>` as being very similar to `<me>`. If you are tempted to put a L^AT_EX `\` into an `<mrow>`, think twice.

On any given `<mrow>` you can place the `@number` attribute, with allowable values of `yes` and `no`. These will typically be used to override the behavior inherited by the container, but there is no harm if they are redundant. A given line of the display may be the target of a cross-reference, though the numbering flexibility means you can try (and fail) to target an unnumbered equation.

An `<mrow>` may have a `@tag` attribute in place of a `@number` attribute. This will create a “number” on the equation which is just a symbol. This is meant for situations where you do not want to use numbers, and the resulting cross-reference is “local.” In other words, the `<xref>` and its target are not far apart, such as maybe within the same `<example>` or the same `<proof>`. Allowable values for the attribute are: `star`, `dstar`, `tstar`, `dagger`, `ddagger`, `tdagger`, `hash`, `dhash`, `thash`, `maltese`, `dmaltese`, `tmaltese`. These are the names of symbols, with prefixes where the prefix `d` means “double”, and the prefix `t` means “triple”. Cross-references to these tagged equations happens in the usual way and should behave as expected. See [Section 3.3](#) and [Section 6.4](#) for more on cross-references.

6.6.4 Special Characters

The L^AT_EX macros, `\amp;`, `\lt;`, and `\gt;` are always available within these mathematics elements, so that you can avoid the special XML characters `&`, `<` and `>`. See [Section 3.12](#) for this same information, but in the broader context of your entire document.

6.6.5 Text in Mathematics

Once in a while, you need a little bit of “regular” text within an expression and you do not want it to look like a product of a bunch of one-letter variables. Use the `\text{}` macro for these.

- Do place surrounding spaces inside the `\text{}` macro.
- Do not place any mathematics inside the `\text{}` macro.
- Do not use the `\mbox{}` macro as a substitute.

For example,

```
<me>f(x) = \begin{cases} x^2 \amp \text{if } x > 0 \\ -7 \amp \text{otherwise} \end{cases}</me>
```

produces

$$f(x) = \begin{cases} x^2 & \text{if } x > 0 \\ -7 & \text{otherwise} \end{cases}.$$

This example amply illustrates the use of macros for XML special characters (twice), appropriate use of the `\text{}` macro (twice), spaces in the `\text{}` macro (once), sentence-ending punctuation (see the source, the period is *not* inside the `<me>` element) and yes, we did think twice about the `\` (an exception to the rule).

6.6.6 Cross-References in Display Mathematics

A cross-reference is achieved with the `<xref>` element, see [Section 3.3](#). You can place an `<xref>` inside a `<mrow>`, and remarkably, it will do the right thing. This is one of only two XML elements you can mix-in with L^AT_EX syntax. A typical use is to provide a justification or explanation for a step in a proof, derivation, or simplification. And it works best with alignment, see below.

6.6.7 Alignment in Display Mathematics

Displayed mathematics is implemented with the AMS-L^AT_EX `align` environment. Ampersands are used to control this, so use the `\amp` macro for these. The first ampersand in a line or row is an alignment point, typically a symbol, like an equality. The next ampersand is a column separator, then the next is an alignment point, then a column separator, then... The moral of the story is you should have n alignment points, with $n - 1$ column separators, for a total of $2n - 1$ ampersands—always an odd number.

For example,

```
<md>
  <mrow>A \amp = B \amp D \amp = E \amp \amp \text{Because}</mrow>
  <mrow> \amp = C \amp \amp \amp = F \amp \amp <xref ref="txo" /></mrow>
</md>
```

produces

$$\begin{array}{lll} A = B & D = E & \text{Because} \\ = C & = F & \text{Table 6.4.2.} \end{array}$$

Sometimes you want several short equations on one line. Do not use `<me>`. Instead use a single `<mrow>` inside an `<md>`, and use alignment to spread them out evenly.

For multi-line display mathematics with no ampersands present, each line will be centered. This is implemented with the AMS-L^AT_EX `gather` environment.

You can fool the alignment behavior by hiding all your ampersands in macro definitions, so there is the optional `@alignment` attribute for the `<md>` or `<mdn>` element, in order to force the right kind of alignment. Allowable values are `gather`, `align`, and `alignat`. The latter is similar to `align`, but no space is automatically

provided between columns. You can leave it that way, or explicitly add your own. For example, this allows you to precisely arrange individual terms of a system of linear equations, especially when terms with zero coefficients are omitted. When using the `alignat` option PreTeXt tries to count ampersands to see how many columns you intend, since L^AT_EX needs this number (we are not sure why). This detection can be fooled too, especially if you have something like a matrix with lots of ampersands for other purposes. So set the `@alignat-columns` attribute to the *number of intended columns*, if necessary.

6.6.8 Fill-In Blanks in Mathematics

The other mix-in XML element is `<fillin>` with an optional `@characters` attribute that takes an integer value. You will get a thin horizontal line, on the baseline, which can suggest to a reader that they should supply something within the surrounding mathematics. The attribute suggests the length of the line—experiment a bit, since it is not super-precise.

6.6.9 Page Breaks for Tall Display Mathematics

For print output, do nothing additional and L^AT_EX will do its best to break your display between lines. You can turn this behavior off by setting the `@break` attribute on the `<md>` or `<mdn>` to the value `no`. Once you do this, you can then selectively allow a page break after a given `<mrow>` by setting the `@break` attribute on the `<mrow>` to the value `yes`.

6.6.10 Your Macros

These go in the `<docinfo>` section, wrapped in a `<macros>` element. Keep them simple—one or two arguments, and one-line definitions. This is not the place to be fancy, and not the place to try to end-run the structural aspects of PreTeXt. The idea is to define something like `\adjoint{A}` for the matrix A to be a superscript asterisk, and later you can change your mind and use a superscript dagger instead. Keep in the spirit of PreTeXt and use readable, semantic macros. For example, do not use `\a{A}` for the adjoint of A.

PreTeXt will use your macros correctly for print and for HTML, after erasing whitespace from the left margin, and stripping L^AT_EX comments.

6.6.11 Punctuation After Display Math

If a chunk of displayed math concludes a sentence, then the sentence-ending punctuation should appear at the conclusion of the display. (And certainly not at the start of the first line after the display!) But do not author the punctuation within the mathematics element, put it afterwards, where it logically belongs.

More specifically, place a sentence-ending period (say) *immediately* after the closing of an `<me>`, `<men>`, `<md>`, or `<mdn>` element. PreTeXt will place the period in your output in the right place and in the right way. (By using L^AT_EX's `\text{}` macro, if you are curious to know the details.) Here is an example. The XML source

```
<md>
  <mrow>(a+b)^2</mrow>
</md>. Now...
```

will render as

$$(a + b)^2.$$

Now...

This all applies more generally to clause-ending punctuation, such as a comma. Take notice of the requirement that the punctuation must be *immediately* after the closing tag of the math element, otherwise it will not migrate properly. For example, do not interrupt the flow with whitespace, or an XML comment, or anything else.

Here is a technical subtlety that will demonstrate some of the inner machinery of PreTeXt and our conversions. In your work, locate a theorem that has some numbered display mathematics (`mdn`) which is

at the end of a sentence, and which you have authored as described above. In HTML output, test a cross-reference (`xref`) to the theorem and you will see the period for the end of the sentence at the end of the display, where it should be. Now test a cross-reference (`xref`) to one of the numbered equations. First, the `knowl` will contain the entire display, to provide context, but it also will not contain the period, since the rest of the sentence is not in the `knowl` and so the period is not necessary.

6.6.12 Additional Packages

Generally, you cannot add additional packages for use within mathematics. The exception is a package with support available optionally within MathJax. And it must have the same name as its normal L^AT_EX version. Then set a `docinfo/latex-preamble/package` element to be the common name of the package. (The `cancel` package is one such example.)

Then the supported macros of the package will be available with your mathematics elements, and you can use them within other macro definitions. We do not guarantee the absence of conflicts with other packages in use, even if employed by PreTeXt. Nor do we support debugging such conflicts.

6.6.13 Extras

There are two existing additional options, which we might want to remove some day for technical reasons. Macros from the `extpfeil` extensible arrows package are available by default, and an `\sfrac{}{}` macro is available for appealing inline “slanted fractions.”

6.7 (*) Lists and their Labels

6.8 (*) Exercises and their Answers

6.9 Images

6.9.1 Raster Images

A **raster image** is an image described pixel-by-pixel, with different colors and intensities. Photographs are good examples. Common formats are Portable Network Graphics (PNG) and Joint Photographic Experts Group (JPEG, JPG), which will both work with `pdflatex` and modern browsers. JPEG are a good choice for photographs since they are compressed on the assumption they will be viewed by a human, while PNG is a lossless format and good for line art, diagrams and similar images (if you do not have vector graphics versions, see below).

To use these images, you simply provide the filename, with a relative path. A subdirectory such as `images` is a good choice for a place to put them. It is your responsibility to place these images where the L^AT_EX output will find them or where the HTML output will find them. The XML would look like:

```
<image source="images/crocodiles.png" width="50%" />
```

Typically you would wrap this in a `<figure>` that might have an `@xml:id` attribute for cross-references, with or without a caption. There is no `@height` attribute, so the aspect ratio of your image is your responsibility outside of PreTeXt. The `@width` attribute is a percentage of the available width of the text (outside of a `<sidebyside>` panel). Default width is typically 90%.

You may also provide a `<description>` which will aid accessibility for electronic formats. Keep such readers in mind and provide as much description as possible. Keep the markup simple, since this will typically migrate to an HTML attribute that cannot contain any structure. Be careful to avoid double-quotes. For example,

```
<image source="images/crocodiles.jpeg" width="50%">
  <description>Five crocodiles partially submerged in the shallows.</description>
</image>
```


6.9.2 Vector Graphics

An image is a **vector graphic** if the file describes the geometric shapes that constitute the image. So a simple diagram would be a good candidate, but a photograph would not. Popular formats are Portable Document Format (PDF) and Scalable Vector Graphics (SVG). You will get the best results with PDF images in L^AT_EX output and SVG images for HTML. The principal advantage of these formats is that they scale (big or small) smoothly, along with fonts. This is critical when you cannot predict the screen size for a reader of an electronic version.

Unless you describe these images with a language (see next subsection), you are responsible for providing the PDF and SVG versions. The `pdf2svg` utility is very useful if you have PDF images only. To use these images, you simply follow the instructions above, but do not include a file extension. This alerts the conversion to use the best possible choice. So presuming we had files `images/toad-life-cycle.pdf` and `images/toad-life-cycle.svg`, an example would be:

```
<image source="images/toad-life-cycle" width="85%">
  <description>Diagram of the four stages of a toad's life.</description>
</image>
```

6.9.3 (*) Images Described by Source Code

To be written once elements and tags solidify, see sample article for examples.

6.9.4 Image Archives

As an instructor, you might want to recycle images from a text for a classroom presentation, a project handout, or an examination question. As an author, you can elect to make images files available through links in the HTML version, and it is easy and flexible to produce those links automatically.

First, it is your responsibility to manufacture the files. For making different formats, the `mbx` script can sometimes help (Chapter 8). The Image Magick `convert` command is a quick way to make raster images in different formats, while the `pdf2svg` executable is good for converting vector graphics PDFs into SVGs. Also, to make this easy to specify, different versions of the same image must have identical paths and names, other than the suffixes. Finally, the case and spelling of the suffix in your MBX source must match the filename (e.g. `jpg` versus `JPEG`). OK, those are the ground rules.

For links for a single image, add the `@archive` attribute to the `<image>` element, such as

```
<image ... archive="pdf svg">
```

to get two links for a single image.

To have every single image receive an identical collection of links, in `docinfo/images` place an `<archive>` element whose content is the space-separated list of suffixes/formats.

```
<archive>png JPEG tex ods</archive>
```

will provide four links on every image, including a link to an OpenDocument spreadsheet.

For a collection of images that is contained within some portion of your document, you can place an `@xml:id` on the enclosing element and then in `docinfo/images` place

```
<archive from="the-xml-id-on-the-portion">svg png</archive>
```

to get two links on every image *only* in that portion (chapter, subsection, side-by-side, etc.). The `@from` attribute is meant to suggest the root of a subtree of your hierarchical document. If you use this, then *do not* use the global form that does not have `@from`.

You may accumulate several of the above semi-global semi-local forms in succession. An image will receive links according to the last `<archive>` whose `@from` subtree contains the image. So the strategy is to place general, large subtree, specifications early, and use refined, smaller subtree specifications later. For example,

```
<archive from="the-xml:id-on-a-chapter">svg png</archive>
<archive from="the-xml:id-on-the-introduction">jpeg</archive>
<archive from="the-xml:id-on-a-section-within" />
```

will put two links on every image of a chapter, but just one link on images in the introduction, and no links at all on every image within one specific section. Again, do not mix with the global form. You can use the root document node (e.g. <book>) for @from to obtain a global treatment, but it is unnecessary (and inefficient) to provide empty content for the root node as first in the list—the same effect is the default behavior.

Notice that this facility does not restrict you to providing files of the same image, or even images at all. You could choose to make data files available for each data plot you provide, as spreadsheets, or text files, or whatever you have, or whatever you think your readers need.

Finally, “archive” may be a bit of a misnomer, since there is no historical aspect to any of this. Maybe “repository” would be more accurate. Though for a history textbook, it might be a perfect name.

6.10 (*) Tables and Tabulars

6.11 (*) Program Listings

6.12 Side-by-Side Panels

Documents, pages, and screens tend to run vertically from top to bottom. But sometimes you want to control elements laid out horizontally. A <sidebyside> is designed to play this role. It is best thought of as a container, enclosing **panels**, and specifying their layout. Examples include three images, all the same size and equally spaced. Or a poem occupying two-thirds of the available width, with commentary adjacent in the remaining third. Or an image next to a table. But the most common use may be a single image (with no caption, and hence no number), whose width and horizontal placement are controlled by the layout.

See the schema for the exact items that are allowed in a <sidebyside>. To author, just place these items within <sidebyside> in the order they should appear, left to right. Then you add attributes to the <sidebyside> element to affect placement.

Instead of placing a @width attribute on each item, instead place this on the <sidebyside> element. A single @width will use the same value for each panel. For different widths, use the plural form @widths and provide a space-separated list of percentages. The default is to give each panel the same width, and as large as possible, which will result in no gap between panels.

The margins can be specified with the @margins attribute, which if given as a single percentage will be used for both the left and right sides. You may also specify asymmetric left and right margins with two percentages, separated by a space, in the same attribute. An additional option is to use the value *auto* which will set each margin to half of the (common) space between panels. This is also the default. In the case of a single panel, the left margin, right margin, and panel width should all add up to 100%.

Once the widths and margins are known, any additional available width is used to create a common distance separating panels. (Which is not possible when there is just a single panel.)

Independent of horizontal positioning, individual panels may be aligned vertically. The attribute is @valign and its value is a space-separated list of *top*, *middle*, and *bottom*. The singular version, @valign, is used to give every panel the same alignment, using the same keywords. The default is to have every panel at the *top*.

We could give lots of examples, but instead it might be best to just experiment. Error-checking is very robust, so it is hard to get it too wrong. OK, we will do just one to help explain. Suppose a <sidebyside> contains three panels and has layout parameters given by

```
<sidebyside widths="20% 40% 25%" margins="auto" valign="middle">
```

Then there will be 15% of the width left to space out the panels. The two gaps are each 5% of the width, and the remaining 5% is split between the margins at 2.5% each. And the vertical midlines of each panel

are all aligned.

For a single panel with no attributes, the panel will occupy 100% of the width. A single panel with a specified width will get equal (auto) margins, resulting in a centered panel.

Captioned items as panels deserve special mention. These will continue to be numbered consecutively, with one exception. If you place a `<sidebyside>` inside of a `<figure>`, then the `<figure>` will be numbered, and the captioned items inside the `<sidebyside>` will be **sub-captioned**. In other words, the second captioned panel of a `<sidebyside>` inside Figure 5.2 would be referenced as Figure 5.2.b.

An `<sbsgroup>` (“side-by-side group”) contains only `<sidebyside>`, which are displayed in order. However, all of the layout parameters allowed on a `<sidebyside>` may be used on an `<sbsgroup>`. This might allow a collection of fifteen images to be laid out in three rows of five images each, with widths and spacing identical for each row because the parameters are specified on the `<sbsgroup>` element. In this way, simple grids can be constructed. Note that any layout parameters given on an enclosed `<sidebyside>` will take priority over those given on the `<sbsgroup>`. Captioning behavior extends to an entire `<sbsgroup>`.

Since `<sidebyside>` and `<sbsgroup>` are containers they cannot be referenced and so do not have an `@xml:id`. However, you can reference their individual contents if they are captioned, and you can reference an enclosing `<figure>`.

Generally, a `<sidebyside>` or `<sbsgroup>` can be placed as a child of a division, or within various blocks, such as `<proof>` for example. See the schema for (evolving) specifics.

It should be clear now that a `<sidebyside>` is more about presentation than most PreTeXt elements, though there is some semantic information being conveyed by grouping the panels with one another.

6.13 (*) Front and Back Matter

6.14 (*) Automatic Lists

6.15 URLs and External References

6.15.1 URLs to External Web Pages

The `<url>` tag can be used to point to external items (as distinct from other portions of your current document, which is accomplished with the `<xref />` element, [Section 3.3](#)). It always needs a value for the `@href` attribute, most likely a URL. Most of this time, this will point to some resource available on the Internet but it could be a file on the system hosting your document, perhaps using a relative address (but see the rest of this section for some cautions). Here are three scenarios:

- The `<url>` element is empty. Then the value of the `@href` is also used for the visible text of the link, verbatim, and usually in a monospace font. Use **percent-encoding** (aka **URL encoding**) for the `@href` attribute to include special characters, such as spaces.
- The `<url>` element has content. Now the content should be authored as you would any other text in a sentence. Potentially problematic characters, such as a tilde should be authored with provided empty elements, but authored literally in the `@href` attribute.
- The `<url>` element has content, but you want this content to look like a URL. Use the `<c>` element around the content, and follow the rules for verbatim text. I do this often for simple URLs that point to the top level of a website. The `@href` is a complete URL like `http://mathbook.pugetsound.edu/` but for content I use a less-imposing reader-friendly version like `mathbook.pugetsound.edu`.

You can place an external reference into a `<title>` element, but a particular conversion is free to simply render it as text, and not as an active link.

For \LaTeX output it gets quite tricky to handle all the various meanings of certain escape characters in URLs in more complicated contexts (such as tables, footnotes, and titles), so there may be some special cases where the formatting is off or you get an error when compiling your \LaTeX . We handle most of these situations, but we always appreciate reports of missed cases.

6.15.2 URLs to External Data Files

The `<url>` element can be used to make data files available to your reader. Consider the example of a spreadsheet containing a large data set that a reader needs to analyze as part of an exercise. Here are our recommendations on how to accomplish this:

- If the file is hosted on some server unassociated with your project, and does not have a license compatible with your project, then just set the `@href` to the complete address. Be sure to include enough of the address for the reader of a print version to be able to type in the URL, either as the content of the `<url>` or in close vicinity.
- If you authored the spreadsheet, or you are allowed to legally copy and distribute it, then place it on your server where you host your book project. Then do as above and use the full URL for the `@href` attribute, with a visible version available for PDF and print versions.
- If you have control over the placement of the file, you can host it on your server, and use a URL relative to the location of your HTML, PDF, or other files that comprise your document. This might be a good choice if your book will be posted many places and you can give it to others as an archive, like a `*.zip` file. It is a bad idea if a reader downloads a PDF without the data file following along and remaining in the same relative location. It is an impossible idea if your document gets printed on paper and there is no idea what a relative URL means and there is not even a link to click on.

Consider your audience and think about how much guidance they need about using context menus or helper/viewer applications to make use of the file formats you are providing. This advice may be different depending on the type of files and the types of output for your document.

6.16 Video

The `<video>` element is used to embed a video in output formed from HTML. It may be placed inside a `<figure>` or can be a panel of a `<sidebyside>`. The former will have a caption, be numbered, and hence can be the target of a cross-reference (`<xref>`). The latter is anonymous, but allows for horizontal layout, and combinations with other panels.

Size is controlled by a `@width` attribute expressed as a percentage (on the `<video>` element when used in a figure, or as part of the `<sidebyside>` layout parameters). Height is controlled by giving the **aspect ratio** with the `@aspect` attribute on the `<video>` element. The value can be a ratio expressed like 4:3 or a decimal number computed from the width divided by the height, such as 1.333. The default for videos is a 16:9 aspect ratio, which is very common.

If you host the video content as part of your output, then the `@source` should be a relative file name that points to the file containing the video, but *without an extension*. The supported formats are MP4, Ogg, and WebM. Browser capabilities and provided files are searched preferentially in that order. In other words, you can provide files in more than one format and increase the likelihood that a reader's browser will find a format it can playback.

For a video hosted at YouTube, find the 11-character identification string in the address of a video you are viewing. It will look something like `hAzdgU_kpGo`. Then simply provide this with the `@youtube` attribute, such as

```
youtube="hAzdgU_kpGo"
```

Options include specifying a `@start` and an `@end` in seconds as integers (no units) if you only want to highlight a key portion of a video. The `@play-at` attribute can take the following values

embed Play in place (the default action).

popup Play in new window or tab, at 150% width.

select Provide the reader the choice of the other two options.

In an educational setting, sometimes the preview images provided by YouTube can be distracting, or for an author-hosted video you may wish to provide your own preview image. The `@preview` attribute can take on the following values

default Whatever the video playback provides (also the default action).

generic PreTeXt supplies a Play-button image.

custom Not implemented yet (2017-08-28). Send a request.

The `mbx` script (Chapter 8) may be used to download the provided preview images for YouTube videos. Filenames will be formed from the `@xml:id` of the `<video>` element. These will be used in static versions of output, such as `print`. Once custom preview images are implemented for author-hosted video, their static representation will improve.

Contemplated extensions, as of 2017-08-28, would be specifying content from Vimeo, and/or Google Drive. Send requests if these are of use.

6.17 (*) Units of Measure

6.18 Unicode Characters

PreTeXt supports (and encourages) the use of Unicode characters. Here are some relevant comments.

- Unicode characters will migrate well to any output format based on HTML. Most browsers will have a variety of fonts with glyphs to realize these characters.
- L^AT_EX will not always behave as smoothly. For openers, you definitely will want to use the `xelatex` engine to build a PDF. Then you need to be sure your system has a font with the necessary characters and you make the font known to `xelatex`. We are working out the details of the best way to accomplish this.
- How do you get a Unicode character into your source? In part this is specific to your operating system and editor, so is outside the scope of this guide, but we have hints below for popular operating systems.
- You can always place a Unicode character in your source using XML syntax. The first thing an XML parser will do is convert this syntax into a character. The number of the SECTION SIGN in hexadecimal is `A7`, so the syntax `§`; is identical to the character §. Of course, this will get tedious fast.
- The [Full Unicode Input](http://www.cs.tut.fi/~jkorpela/fui.html#8) utility at `www.cs.tut.fi/~jkorpela/fui.html#8` will allow you to specify a chunk of 256 consecutive Unicode numbers and then you can click on characters to make a string of several or many. You can cut/paste these into your source, or convert the whole lot to XML syntax all at once.
- Unicode characters have standardized names. You can find these, and more information, including font support, at the Unicode section of [FileFormat.info](http://www.fileformat.info/info/unicode/), `www.fileformat.info/info/unicode/`. If you are struggling to find a specific character, then using this site's name in a search will often quickly locate what you need. Be sure to experiment with the test pages there for browser and font support (including checking your local configuration).
- **Warning:** do not use Unicode characters as a way to get mathematical symbols (that is delegated to our use of L^AT_EX syntax). And do not use Unicode when we have provided an empty element for a character, especially when that character may be used in a markup syntax for some output, such as L^AT_EX, HTML, JSON, Markdown, . . .

For example, if you put many naked hash symbols (`#`) in your source, then you will get nice HTML, but when you try to get `print` from a PDF from L^AT_EX you will have a train wreck on your hands when you compile the L^AT_EX. Instead, be sure to always use the provided `<hash />` element. *Always*. Other empty elements are conveniences, which spare you from looking up Unicode numbers and make your source more readable, rather than a necessity to avoid special characters. An example is `<times />`, for use outside of a strictly mathematical setting: “I bought a 2×4 at the lumberyard.”

6.18.1 Unicode Support in OSX

Mitch Keller reports on 2017-01-12 a way to get some popular characters with OSX. Use the Keyboard preference pane under System Preferences. In there, you can enable

Show Keyboard, Emoji, & Symbols Viewers in menu bar

Once you activate the keyboard viewer, you get a keyboard on your screen. When you hold down `opt`, it shows you what other symbol you would get if you push `opt+letter`. For instance, `opt+w` gives an upper-case Greek sigma and `opt+=` gives a not-equals sign (neither of which we can handle when processing the latex version of this guide). To get `ä`, you type `opt+u` and then hit `a`. This is illustrated by the keys for diacritical marks being highlighted in orange while holding `opt`. The shift key can have an effect to produce variations of some characters, such as quote marks (dumb versus smart).

6.18.2 (*) Unicode Support in Linux

6.18.3 (*) Unicode Support in Windows

6.19 (*) Testing Sage Examples

6.20 Xinclude Modularization

The `xinclude` mechanism is not part of PreTeXt, *per se*. It is of some use for organizing your authoring, so you do not have mammoth files open in your text editor. As discussed in [Section 4.2](#) there is very little value in modularizing so much that you have many very small files, and also almost no benefit whatsoever to using directory structure to duplicate the inherent tree-like structure of XML. Many small files, or deeply-nested directories, seem to be of little help and can cause more headaches than they are worth.

The `xinclude` mechanism automatically introduces a `@xml:base` attribute, which we need to account for in the RELAX-NG schema ([Chapter 5](#)). So we limit which PreTeXt elements may be the root element of an included file. The rough, general rule is that if an element *can* have a title, then it can be the root element of an included file. So in particular each of the divisions (`<chapter>`, `<section>`, etc.) is a candidate.

One special exception to this restriction is the use of text files, containing absolutely no markup at all. Two good examples are the `<input>` child of a `<program>` or the `<latex-image-code>` element used to describe an `<image>` by source code that L^AT_EX understands.

In both cases you can put the text content of these elements in a separate file, use the `@href` attribute of `<xi:include>` to point to the file, and then the twist is to set the `@parse` attribute to the value `text`. This has two general benefits. First, you now *cannot* have any XML in the file, so you do not have to have a single root element for the file (and so the schema imposes no restrictions). Second, you do not need to escape any problematic characters like ampersands and angle brackets ([Section 6.3](#)), nor use the misunderstood CDATA mechanism.

Additionally, in the case of `<latex-image-code>` you can park unsightly code away in files so you do not have to look at it, or you can create a small driver L^AT_EX program to test each one, or even better, you may want to use the same image more than once (maybe in different figures?) and can just include it repeatedly, while only ever editing the single copy.

Finally, the `<input>` and `<output>` children of `<program>`, `<sage>`, and `<console>` are also candidates for this device. In particular, you may want to have the code for a program in its own file where you can test it easily with an interpreter or compiler. There is one gotcha. If you were to put a newline between `<input>` and `<xi:include>` there is the very real potential of unwanted whitespace bleeding into your PreTeXt output. Our suggested remedy uses an example from Bob Plantz. Convert

```
<program language="c">
  <input>
    <xi:include parse="text" href="intAndFloat.c"/>
  </input>
</program>
```

to

```
<program language="c">
  <input><xi:include parse="text" href="intAndFloat.c"/></input>
</program>
```

There are some fancy XSLT tricks you can employ to use more complicated content repeatedly. Your source will be less portable, and we do not support or recommend these techniques. But if you want to go anyway, see hints at www.sagehill.net/docbookxsl/DuplicateIDs.html. Note the reliance on `xpointer()`, and that the final technique is restricted to DocBook, a different XML vocabulary.

6.21 Accessibility

Continuing our discussion from [Section 3.24](#) we begin by listing features of our conversion to HTML which happen automatically.

CSS Wherever possible we supply HTML elements and class names that will be interpreted sensibly by a screen reader in the absence of styling provided by CSS.

Mathematics MathJax (mathjax.org) is the JavaScript library we use to render mathematics. It provides extensive capabilities for screen readers to render the mathematics audibly, and by default your document is configured to take advantage of these features. We refer the reader to the MathJax documentation of [Accessibility Features](#) at docs.mathjax.org.

Skip to Main Content Repeatedly pressing the Tab key will move a reader from one location to the next in a web document. Since your Table of Contents in the left sidebar is a series of many links, a reader will need to tab through *all* of these to eventually reach the interesting content on a page.

However, we support a common device. The first link on every page is hidden from all readers, but an initial Tab will present a link labeled Skip to Main Content which when executed will take the reader past the Table of Contents and to the start of the content at the top of the page.

Colors We are sensitive to the fact that some readers have difficulty distinguishing between certain colors. So we do our best to distinguish text, or other elements, without relying exclusively on color. For example, the `<delete>` and `<insert>` elements may render text with strike-through and underlining (respectively) to show the distinction.

Here are features which are provided, but require your participation as the author.

Image Description Images you author or supply will be invisible to some readers. Within every `<image>` element you can use a `<description>` element. The content here will migrate to places like the HTML `@alt` attribute to be picked up by screen readers.

Make the content very expressive and detailed, but also do not use any markup whatsoever, just simple characters, and avoid quotation marks.

Image Formats University offices that provide services for students with disabilities are often interested in the images themselves from a text, as standalone files. You could use the `mbx` script to produce a variety of different formats and bundle these up in a single archive file for distribution at your book's website. Or you can make each image available through adjacent links placed automatically. We call these "image archives." See [Subsection 6.9.4](#).

Cross-References [Section 6.4](#) describes a variety of ways to customize the look and content of a cross-reference. You can create a larger target for clickable items by making the text as long as possible. So for example an `<xref>` authored as

```
<xref ref="theorem-FTC" text="type-global" />
```

would cause the clickable portion to be something like "Theorem 5.16", whereas

```
<xref ref="theorem-FTC" text="global" />
```

would then cause the clickable portion to be simply the much shorter “5.16”. Of course, you can set a default style for your entire document, so it is not necessary to continually provide the `@text` attribute.

Chapter 7

(*) Add-Ons

Some features of the HTML version of a document rely on third-party services. Once an author configures them, then PreTeXt will do the rest for you. This chapter provides guidance on the configuration processes.

7.1 (*) Analytics

7.2 Search

Search facilities are enabled through [Google Custom Search Engine](#). Please, please report any discrepancies in the following instructions as the setup interface at Google changes out from underneath us. These instructions are accurate as of 2016-12-12.

Besides being useful for search facilities, setting up a search engine might be a good way to alert Google of something newly available, and initiate your book's rise up the search results rankings.

1. Create an account with Google (GMail, YouTube, etc.) and make sure you are signed in.
2. Visit [GCSE](#) and Add a new search engine of follow `New Search Engine`.
3. Provide a URL for the top-level domain name/directory for your book/document. Everything below this will be indexed. We have taken some care to mark knowl content in a way compatible with the search facility, but there is more work to do here.
4. Give the engine a GCSE-specific name, so you can tell later which one it is when you have several.
5. Under `Edit Search Engine > Setup > Basics > Details > Search engine ID` find a string which uniquely identifies your new search engine. Save this, you'll need to make it part of your MBX document.
6. Under `Edit Search Engine > Setup > Admin` add co-authors or trusted backup personnel.
7. Under `Edit Search Engine > Business > Settings` set your Advertising status to the non-profit setting if you qualify (most universties should).
8. Fiddle with `Edit Search Engine > Look and Feel` at your own risk! Only the defaults are tested and supported.
9. `Edit Search Engine > Setup > Indexing` sends you to Google Search Console to see if your book is already being indexed. YOu may need to go through a confirmation process

to establish that you are the owner of the website being indexed. If you see that your book is not yet being indexed, you may want to wait as long as a week before your material does get indexed and you make a search box available.

List 7.2.1: Configuring Google Custom Search

1. The Search engine ID you saved from above is referenced in Google's code as a `cx` number. Add an element in your MBX source as `docinfo/search/google/cx` with the value of your book's ID as the content. See the sample article for a working example to mimic.
2. The `cx` element will alert the PreTeXt conversion and fully enable and implement search. You're done, and everything should just work. You should see a Google-branded search box to the top right of each of your pages. (We have no control over the branding.)
3. Time to rebuild your official HTML output and make the improved version available.

List 7.2.2: Configuring PreTeXt for Google Search

7.3 (*) Annotation

Chapter 8

The `mbx` Script

XSL is a very powerful language for text processing. However, it cannot do everything. The `mbx` script is a Swiss Army Knife of sorts to operate on parts of your document and manage processing that requires the application of external programs, such as L^AT_EX and Sage.

8.1 Running `mbx`

`mbx` is a Python script, so you will need to have the Python interpreter on your system. At a command-line (in a terminal or console), you can run

```
mbx -h
```

to get a summary of the commands. Some of the processing may take a long time, or you may experience trouble. There are two switches to enable more verbose output in your terminal or console.

```
mbx -v
```

will provide progress indicators, while

```
mbx -vv
```

will provide progress indicators along with additional information that will help you or a fellow author to discern where a problem lies. Please *include all of this output* if you are asking for help, and do not assume you know exactly which part is relevant.

8.2 Example Use

Here is a typical example of using `mbx`. You have several (or many!) diagrams and figures in your PreTeXt source, all authored in the TikZ language, and so packaged up within `<latex-image-code>` elements. Your L^AT_EX/PDF output looks beautiful, since PreTeXt simply inserts the TikZ code into the right place in the generated `*.tex` file, and you have done this several times until your figures look just right.

Now you need to generate the SVG versions of your images that will accompany your HTML version of your book and provide nice scalable graphics. This is exactly the sort of chore the `mbx` script was designed for. You might run

```
mbx -vv -c latex-image -f svg -d ~/books/aota/images ~/books/aota/animals.xml
```

Here `-c` is specifying the “component” of your book to process, and `-f` is specifying the “format” of what is being produced. The `-d` argument specifies a directory where the output ends up, in this case a collection of SVG files, one per image.

8.3 Strategy

Much like the build advice at the end of [Section 4.8](#), the `mbx` script collects necessary bits into a system-created temporary directory, does its work, and copies out the desired results. So in the example of the previous section, each chunk of TikZ code is isolated, your \LaTeX macros are copied from `<docinfo>`, and a syntactically correct \LaTeX file is produced (one per image). Then `mbx` calls your \LaTeX executable on each of these files to produce a one-page PDF. This is then cropped and converted to an SVG version, which at the end is copied to the location specified in the `-d` argument.

Some insight into failures can be found in the temporary directory where all this processing happened. (We leave the directory, and its contents, behind for the system to clean-up later). Early in the `-vv` doubly-verbose output, this directory is reported after the string `temporary directory:`.

Some notes:

- If you have modularized your source across more than one XML file, then be sure to provide your “top-level” or “master” file as the final argument to the script, just like you would for an invocation of `xsltproc`. It is important to understand that your source is one huge “source tree” and your file-by-file modularization is never respected or recognized in any way. In particular, use of the `xinclude` mechanism is handled by the script, and you should not apply the script to each of your source files individually. If image production (or some other task) takes a long time, see [Section 8.5](#) for a way to have the script restrict its action to only a portion of your project.
- Certain arguments that are filenames require a full (not relative) path to locate the right objects. In the example above, you can see the source file requires this (where the shell in use here will expand the `~` to the user’s home directory). The `-d` flag does not require a full path, and so can be specified relative to the current working directory.
- Do not place the script, or configuration files, anywhere else (except as recommended for your personal copy of the configuration file). The locations are important for locating other files, such as the stylesheets used to isolate parts of your project for processing.
- Much of the work of this script happens in the temporary directory described above. We leave a lot of intermediate work behind in this directory. Often, exploring this directory is helpful when debugging problems, or a failure to finish successfully.

8.4 Debugging Image Generation

A principal use of the `mbx` script is to isolate source code from `latex-image-code` sections, package them up as proper `*.tex` files, run \LaTeX to make cropped PDF versions, and then convert these to other formats such as SVG or PNG.

Much of this activity happens in a temporary directory. If you use the `-vv` switch described above, then one of the messages early in the output describing the initialization will be the name of this directory. Looking to see what files end up there, and what those files contain, is often useful in determining the step where this toolchain fails, and maybe even why.

Another option is to ask for the actual `*.tex` files as the result of a run. This is accomplished with the `-f` source option when invoking `mbx`. If the right packages or macros are not being employed in these files, this is an easy way to get at the source files for inspection and analysis.

8.5 Restricting the Scope

The `-r` (`--restrict`) switch deserves special mention. It is followed by the value of an `@xml:id` attribute present in your source XML file. Then whatever action the script is asked to perform, it will only act on a subtree of the hierarchy, rooted at the element with the given `@xml:id` value.

So if your images are complex or numerous (or both!) and take a long time to process, you can restrict attention to whatever part of the document you are actively editing, and you can even restrict to a single `<image>` and so produce just a single graphics file.

8.6 Configuring External Helper Programs

Our main processor, `xsltproc`, is not a general-purpose compiler, and does not “call” external programs. That is the primary purpose of the `mbx` script. You will see a configuration file, `script/mbx.cfg`, as part of the distribution. Read the comments at the top of this file, but foremost, realize that you are not meant to edit this file. It is a template, and any changes you make will be overwritten with an original version when you update. Instead, make a copy and place it as `mathbook/user/mbx.cfg`. The script will look for this copy first, then fallback to the generic version.

The entries of this file are the names of executable files that perform certain tasks as part of the script’s functions. If it seems that certain helper programs are not being found, you can provide full path names, and that may solve the problem.

8.7 Output

Once the `mbx` script produces results, it is your responsibility to keep track of them. Early in a project, you may wish to regenerate images regularly, and not save the results permanently (for instance, you may not want to track them under version control). In this case, a build script is very useful. For a mature project, you may only regenerate images you know have changed, or when you create a new edition. And you may wish to include them with your source files, under revision control, for your readers to use.

More critically, you need to place items generated by the `mbx` script where the rest of your output can find them. For example, by default HTML output expects images to be in a subdirectory named `images`. (This default can be changed, though it seems almost nobody does.)

8.8 `mbx` Capabilities

Again, the command `mbx -h` will remind you of the various options for the script. The following is a brief summary, in general terms, of what is possible.

L^AT_EX Graphics L^AT_EX has a variety of languages for specifying images, such as `xypic`, `pgfplots`, and `TikZ`.

By including the necessary packages or setup commands in `docinfo/latex-preamble`, these can all be generated at once, in the manner of the example earlier.

Asymptote Images described by the Asymptote language can be processed in a manner entirely similar to that for images described with L^AT_EX graphics languages. This requires having the `asy` executable on your system and locatable via the `mbx` configuration file.

Sage Plot If you have a version of Sage installed on your system, you can specify the path to the executable and obtain images described by Sage code. See the sample article for more information.

All Formats If you desire images in a wide variety of formats, the option `-f all` will oblige.

YouTube Thumbnails For each YouTube video you specify, the script will go the YouTube site and grab a thumbnail image for that video. These get used in static formats, such as PDF.

WeBWorK Various conversions of WeBWorK problems are facilitated through communication with a WeBWorK server. This server is specified as an argument to the `-s` option. See [Chapter 9](#) for the details of this procedure.

8.9 `mbx` on Windows

At present, the `mbx` script assumes that your installation is similar to the one described in [Appendix E](#). Making the `mbx` script Windows-compatible is an ongoing project. It is possible you may find a bug, which we would ask that you report. In addition, if you have followed the directions in [Appendix E](#), then you will

need to customize the `mbx.cfg` configuration file, which tells `mbx` where to find the helper programs it relies on. See below for the details.

The script uses a \LaTeX utility called `pdfcrop` to, well, crop PDF images generated by a \LaTeX engine. This utility has not been made to work in the Windows CMD shell. If you want to generate images on Windows, you should use the Git Bash shell as described in [Section E.3](#).

1. Copy the file

```
/path/to/mathbook/script/mbx.cfg
```

to

```
/path/to/mathbook/user/mbx.cfg
```

2. Replace the right-hand side of the entry for `pdfpng` with the full path name of the `convert` utility installed with ImageMagick ([Section E.5](#)), *using forward slashes*. It will be something like

```
c:/ImageMagick-7.0.1-Q16/convert.exe
```

8.10 Python requests Library

In some situations the `mbx` script will go out on the Internet to fetch some interesting bits for you, saving you the trouble. These include

- Grabbing, downloading, and organizing stock thumbnails for YouTube videos, using a standard API provided for this purpose. These get used in PDF output in place of embedded videos.
- WeBWorK problems that are stored on a remote server will give up \LaTeX versions if asked. Again, these are used for PDF output in place of interactive versions.

We use the Python `requests` module/library to manage the connections to these external servers. There are two items to be aware of.

Installation This library is not available on Apple computers by default. From Alex Jordan comes the following incantation at the command line,

```
sudo easy_install pip
sudo pip install requests
```

which was last tested 2017-03-31. Please update us if the situation has changed or there is more to add here.

Warnings Using this library to connect to a webserver securely via HTTPS will raise a warning since the support for SSL certificates is not complete. You will see messages similar to

```
site-packages/requests/packages/urllib3/connectionpool.py:843:
InsecureRequestWarning: Unverified HTTPS request is being made.
Adding certificate verification is strongly advised.
See: https://urllib3.readthedocs.io/en/latest/advanced-usage.html#ssl-warnings
InsecureRequestWarning
```

We have not figured out the best way to stop these, as of 2017-04-01.

Chapter 9

WeBWorK Automated Homework Problems

Alex Jordan

With a WeBWorK server (version 2.12 or higher, limited support with 2.11) and a little setup work, you can embed WeBWorK exercises in your MBX project. HTML output will have interactive problem cells. PDF output will contain static versions of exercises. And all such exercises can be archived by the `mbx` script into a file tree to be uploaded onto the WeBWorK server for use in the “traditional” way.

9.1 Configuring a WeBWorK Course for MBX

We assume a mild familiarity with administrating a WeBWorK server. The version of WeBWorK needs to be 2.12 or later for use with MBX, although with version 2.11 all features should function except for latex output with server-based problems (see [Subsection 9.3.2](#). Using the `admin` course, create a course named `anonymous`. In the course’s Course Configuration menu, set all permissions to `admin` (or perhaps set some to the even more restrictive `nobody`). Except set “Allowed to login to the course” to `login_proctor`.

In the Classlist Editor, add a user named `anonymous`, and set that user’s permission level to `login_proctor`, the permission level one higher than `student`. Set that user’s password to `anonymous`. Note that because this is public information, anyone will be able to log into this course as user `anonymous`. This is why setting the permissions earlier is very important. (Especially preventing this user from changing its own password.)

Add the following lines to the `course.conf` file (which lives in the parent folder of the `templates/` folder.)

```
# Hide message about previewing hints and solutions for instructors
$pg{specialPGEEnvironmentVars}{ALWAYS_SHOW_HINT_PERMISSION_LEVEL} = 100;
$pg{specialPGEEnvironmentVars}{ALWAYS_SHOW_SOLUTION_PERMISSION_LEVEL} = 100;
```

In the `templates/macros/` folder, edit `PGcourse.pl` (or create it if need be) and add the lines:

```
#### Replace essay boxes with a message
sub essay_box {
    my $out = MODES(
        TeX => '',
        Latex2HTML => '',
        HTML => qq!<P>If you were logged into a WeBWorK course
        and this problem were assigned to you,
        you would be able to submit an essay answer
        that would be graded later by a human being.</P>!
    );
    $out;
```

```
};

#### Suppress essay help link
sub essay_help {};

#### How many attempts until hint is available
$showHint = -1;
# May be a bug that WeBWork requires -1 instead of 0
# for immediate access to hints

1;
```

Now both xsltproc with `mathbook-html.xsl` and the `mbx` script will be able to communicate with this course to retrieve what is needed.

9.2 WeBWork Problems in Source

A `<webwork>` tag must be inside an `<exercise>`, optionally preceded by an `<introduction>`, and optionally followed by a `<conclusion>`.

```
<exercise>
  <introduction>
  </introduction>

  <webwork>
  </webwork>

  <conclusion>
  </conclusion>
</exercise>
```

There are several methods for putting content into the `<webwork>`. (Note that an empty `<webwork>` with no attributes will simply produce the camelcase WeBWork logo.)

9.2.1 Using an Existing WeBWork Problem

If a problem already exists and is accessible from the anonymous course's `templates/` folder, then you can simply include it as a `@source` attribute. For example, if it is a problem in the Open Problem Library (OPL) then relative to the `templates/` folder, its path is `Library/...` and you may use:

```
<webwork source="Library/PCC/BasicAlgebra/Exponents/exponentsMultiplication0.pg" />
```

Or if you have a problem's PG file, you can upload it into the anonymous course's `templates/local/` folder and use it with:

```
<webwork source="local/my_probem.pg" />
```

9.2.2 Perl-free Problems

If you'd just like to rattle off a quick question with no randomization, you can do as in this example:

```
<exercise>
  <webwork>
    <statement>
      <p><m>1+2=</m><var name="3" width="5" /></p>
    </statement>
  </webwork>
</exercise>
```


The above example could be given an optional title, introduction, conclusion, hint, and solution. These are discussed in [Subsection 9.2.3](#).

In the above example, "3" is the @name attribute to a <var> element. This is how to create an answer blank that is expecting 3 as the answer. What you give as a @name attribute will be passed as a string to PG's Compute() command, so it needs to be valid input for Compute(). It should *not* begin with a \$.

The default context is Numeric, which understands numerical expressions and formulaic expressions in the variable x . You can activate some other context as in this example:

```
<exercise>
  <webwork>
    <setup>
      <pg-code>
        Context("ImplicitPlane");
      </pg-code>
    </setup>
    <statement>
      <p>The answer is <m> $x+y=1$ </m>.</p>
      <p><var name="x+y=1" width="8" /></p>
    </statement>
  </webwork>
</exercise>
```

Many special contexts are automatically detected by MBX, and it loads the appropriate macro file into the PG problem. However you may need to explicitly load a macro file as described in [Subsection 9.2.3](#).

You should only use this (nearly) Perl-free shortcut if the @name attribute could be put in math mode and simultaneously serve as a printed answer in something like a solutions manual. In the above two examples, this is the case. But in a question with, say, @name="cos(x)/2", if you'd like the solutions manual to print using $\frac{\cos(x)}{2}$, then you should write the problem as described in [Subsection 9.2.3](#).

Additionally, in shortcutting around the structure described in [Subsection 9.2.3](#), you will not have access to certain other features, such as answer format help links.

9.2.3 PG code in Problems

To have randomization in problems or otherwise take advantage of the algorithmic programming capabilities of Perl and WeBWorK's PG language requires using a <setup> tag. Having at least a little familiarity with coding problems in WeBWorK is necessary, although for simpler problems you could get away with mimicking the sample article in mathbook/examples/webwork/. A <statement>, (optional) <hint>, and (optional) <solution> follow. The whole thing can have an optional <title>.

```
<webwork>
  <title>Optional</title>

  <setup>
  </setup>

  <statement>
  </statement>

  <hint>
    <p>Optional</p>
  </hint>

  <solution>
    <p>Optional</p>
  </solution>
```

```
</webwork>
```

The `<setup>` contains a section of `<var>` tags followed by a `<pg-code>`. If you are familiar with code for WeBWorK PG problems, the `<pg-code>` contains lines of PG code that would appear in the “setup” portion of the problem. Typically, this is the code that follows `TEXT(beginproblem())`; and precedes the first `BEGIN_TEXT` or `BEGIN_PGML`. If your code needs any special WeBWorK macro libraries, you may load them in a `<pg-macros>` tag prior to `<setup>`, with each such .pl file’s name inside a `<macro-file>` tag. However many of the most common macro libraries will be loaded automatically based on the content and attributes you use in the rest of your problem.

For each perl variable (scalar, array, or hash) that is used in the `<pg-code>` and which will *also* be used in the `<statement>`, `<solution>`, or as an answer to an answer blank, there should be a `<var>`. These `<var>` tags are primarily to help MBX handle static output, but they also allow for some optimal leveraging of WeBWorK features.

A `<var>` in the `<setup>` always has a `@name` attribute, which should match the variable’s name in your `<pg-code>` (e.g. `$x`, `@a`, etc.). Each `<var>` should usually have a `<static>` tag with \LaTeX code for the static version of the answer (possibly inside a `\text{}`). For PDF and other static output modes, this \LaTeX code will be used to print `<var>` values, since the WeBWorK server will play no role.

Lastly, a `<var>` in the `<setup>` can have a `@category` attribute. This is intended for variables which will be used as answers. Based on a `@category`, an automatic help syntax link will be provided adjacent to an answer blank. For instance `@category="point"` will provide a link explaining the syntax for typing a point.

Here is a small example. Following the example, we’ll continue discussing `<statement>` and `<solution>`.

```
<webwork>
  <title>Integer Addition</title>

  <setup>
    <var name="$a">
      <static>9</static>
    </var>
    <var name="$b">
      <static>8</static>
    </var>
    <var name="$c" category="integer">
      <static>17</static>
    </var>

    <pg-code>
      $a = Compute(random(1, 9, 1));
      $b = Compute(random(1, 9, 1));
      $c = $a + $b;
    </pg-code>
  </setup>

  <statement>
    <p>Compute <m><var name="$a" />+<var name="$b" /></m>.</p>
    <instruction>Type your answer without using the <c>+</c> sign.</instruction>
    <p>The sum is <var name="$c" width="2" />.</p>
  </statement>

  <solution>
    <p><m><var name="$a" />+<var name="$b" />=<var name="$c" /></m>.</p>
  </solution>
</webwork>
```

Within a `<statement>`, `<hint>`, or `<solution>`, reference `<var>` tags by `@name`. For HTML and PG output, the Perl variable will be used. For static output, the `<var>` tag's static child will be used.

Within the `<statement>`, a `<var>` tag with either a `@width` or `@form` attribute creates an input field. The `@name` attribute declares what the answer will be.

An `<var>` can have `@form="essay"`, in which case it need not have a `@name` attribute. This is for open-ended questions that must be graded by a human. The form field will be an expandable input block if the question is served to an authenticated user within WeBWorK. But for the WeBWorK cells in MBX HTML output, there will just be a message explaining that there is no place to enter an answer.

An `<var>` can have `@form="array"`. You would use this when the answer is a Matrix or Vector MathObject (a WeBWorK classification) to cause the input form to be an array of smaller fields instead of one big field.

An `<var>` can have `@form="popup"` or `@form="buttons"`. These are not necessary for HTML and PG output to behave, but are needed if you intend for PDF output to emulate these answer entry field types.

If you are writing a multiple choice question and using `@form="popup"` or `@form="buttons"` in your `<var>`, instead of a `<static>` in the corresponding `<var>` from the `<setup>`, use a `<set>` tag, with `<member>` children. The `<member>` tags would be the multiple choice options, and each can have a `@correct="yes"` attribute to identify the correct choice(s). There is some unavoidable redundancy between listing these `<member>` tags in the `<setup>` and listing them again in the actual `<pg-code>`.

If you are familiar with PG, then in your `<pg-code>` you might write a custom evaluator (a combination of a custom answer checker, post filters, pre filters, etc.). If you store this similar to

```
$my_evaluator = $answer -> cmp(...);
```

then the `<var>` can have `@evaluator="$my_evaluator"`.

An `<instruction>` is specific instructions for how the reader might type or otherwise electronically submit their answer. Contents of an `<instruction>` will be omitted from print and other static output forms. The `<instruction>` is a peer to `<p>`, but may only contain "short text" children.

9.2.4 Reusing a `<webwork>` by `@xml:id`

Planned.

9.3 Processing

9.3.1 `xsltproc`

If your project has `<webwork>` tags, then when you execute `xsltproc`, pass a `webwork.server` string parameter to it specifying where the server is that will do your processing. Example:

```
$ xsltproc --stringparam webwork.server https://webwork.myschool.edu <xsl> <xml>
```

If your `webwork.server` is running version 2.11 (the first version which can be used with MBX), then you should additionally pass `--stringparam webwork.version 2.11`.

For HTML output, this is all that is needed. For \LaTeX , you may need to do more first. See [Subsection 9.3.2](#).

9.3.2 \LaTeX output

If your project uses PG files that live on the WeBWorK server, or if you have `<webwork>` tags that have image creation code in their `<pg-code>` tag, then you will need to retrieve \LaTeX chunks from the server before you use `xsltproc`. The `mbx` script handles this, but only for WeBWorK 2.12 and later:

```
$ mbx -c webwork-tex -s https://webwork.myschool.edu -d <storage location> <xml>
```

The storage location would typically be a folder called `webwork-tex/` located inside wherever you are having `xsltproc` put your output. Then when you run `xsltproc`, tell it where to access this content:

```
$ xsltproc --stringparam webwork.server.latex <storage location> <xsl> <xml>
```

9.3.3 Creating Files for Uploading to WeBWorK

All of the `<webwork>` that you have written into your project can be “harvested” and put into their own `.pg` files by the `mbx` script (this excludes `<webwork>` tags where you gave a `@source` attribute.) These files are created with a folder structure that follows the chunking scheme you specify. This process also creates set definition files (`.def`) for each chunk. For example, you might specify to chunk by section, and then you will have a `.def` file for each section, listing all of the `.pg` files associated with that section. For `<webwork>` tags that used a `@source` attribute, the `.def` file will include them as well. Lastly, this archiving process creates `.pg` files to be used as set header files to go along with each set definition.

```
$ xsltproc --stringparam chunk.level 2 <path to mathbook-webwork-archive.xsl> <xml>
```

This creates a folder called `local/` that will have a subfolder corresponding to your project, which in turn has a folder tree with all of the `.pg` and `.def` files laid out according to your chunk level. You can tarball this `local/` folder (compress it into a `.tgz` file and upload it into an active WeBWorK course where you may then assign the sets to your students (and modify, as you like).

Appendix A

FAQ: Frequently Asked Questions

This is a list of answers to frequent questions, in no particular order.

Why is there no tag for bold? That would be presentation, not content. I will answer that question with a question: *why* do you want to print something in bold? Is it emphasis? (See ``.) Is it the volume number of a journal? (See `<journal>`.) Do you want to SHOUT? Try `<alert>`. And so on. There are lots of good answers, some of which are not yet implemented. We would love to hear about elements you need that are about expressing content, and not about altering presentation. See [Item 1.1.1:1](#) in the .

Why does your conversion to HTML use a fixed width for the text? There is an optimal number of characters per line for human readers, based on research and centuries of book design. So we set a fixed width such that that the default font comes close to achieving this optimal value. We also use responsive design to accomodate the constraints of a small screen as best as possible. A reader will not want to have to carefully resize a browser window to achieve the optimal width, nor should a line of text spread to many, many characters across a very expansive screen. See [Item 1.1.1:4](#) in the .

Everything looks right, but why do I get empty output and some warnings about bugs? There is a good chance you have “modularized” your source files and have not included the `--xinclude` switch on the command-line when you ran `xsltproc`. (See [Section 4.2](#).) We can often recognize this mistake—did you not get a warning? (If not, we can improve the warning if you tell us how your source was organized. So please do, since we would love to hear about it.)

I don’t like surprises and have not updated in months. Now I have a problem. We almost never release mistaken code that breaks output produced from valid source ([Chapter 5](#)). And when we have, the cause is usually a small typo, or something that gets fixed easily and quickly. We do sometimes make backwards-incompatible changes, but you always get warnings, often the changes can wait, there are announcements on the mailing lists, and whenever possible, we update tools that automate the changes.

As volunteers, we cannot support problems from old versions, and sometimes we have to implement changes in reaction to third-party software (like MathJax), which is beyond our control. So while development is rapid, we implore you to remain on the `dev` branch of the repository and `git pull` regularly. Such as *daily*, with your morning coffee as you sit down to write, or with your last compilation of the evening. You will have *far fewer unpleasant surprises* this way, and we can help you better.

We understand that PreTeXt is a moving target, but we are iterating to a better state, and it is best to have everybody along for the *whole* ride.

How do I put mathematics into my list labels? First, realize that the way L^AT_EX uses the term **label** in the context of lists is different from how much of the rest of the world uses the term in this context. In our case the `@label` attribute describes the style of the grouping markers. For example, bullets versus squares on items of an unordered list, or Roman numerals versus Arabic numerals on an ordered

list. So this attribute conveys information *about* the list, not content *of* the list. And even if you tried putting an `<m>` tag into the value of the attribute, you would not have any luck since XML does not even allow that construction. Finally, there is no real good way to accomplish this in HTML, so conversion to that format would be difficult.

The alternative is to use a description list, with tag `<dl>`. You are reading one right now. Put your mathematics in the `<title>` and the associated content into the remainder of the ``.

Why are theorems, definitions, examples, remarks, etc. all numbered using the same counter?

The following is an argument in favor of using common counters for blocks of similar appearance. The argument is stronger in the context of using a printed copy of the book, where physical page flipping is necessary, but also applies to scrolling through a (long) page in a web browser.

Suppose your math professor gave you a note to review Theorem 2.4.7 in your textbook. The “2.4” is useful information directing you to Chapter 2, Section 4. You can tell by the “7” that the theorem is probably not right at the beginning of the section, so you open to the middle of the section. You find yourself on a page with no theorems, but you do see Example 2.4.11. What do you do: flip forward or flip backward?

If theorems and examples are numbered using separate counters, you have no information about which way to go. You need to make a random decision, and flip pages until you find another theorem that you can use as a guidepost. And theorems may be rare and sparse, so it may take quite a bit of page flipping to find that guidepost. You may end up at Theorem 2.4.8, telling you that you need to flip backward now. But how far? Will it be one page earlier or twenty?

If theorems and examples are using the same counter, then you know that you need to flip backward. And perhaps more importantly, the oblivious reader who thinks they are looking for “2.4.7” (and is not thinking about “Theorem”) sees the “2.4.11” and correctly flips backward without even realizing the potential for different counters. As they pass Definition 2.4.10 and Example 2.4.9, they have a sense of the pace at which they are converging on Theorem 2.4.7. This is the main argument for the use of common counters: it makes everything easier to locate.

For another point, perhaps you have read a math book in the past and have seen something like “and according to 2.4.7...”. What if the book has Theorem 2.4.7 and also Example 2.4.7? Which one is the author talking about? If you are lucky, you are conscious that there are multiple possibilities. If you are unlucky, you flip to Example 2.4.7 but the author meant Theorem 2.4.7, and you go a bit mad trying to make Example 2.4.7 logically relevant to the reference.

PreTeXt makes it easy to avoid this particular annoyance, because cross references can identify their “type”, especially through the use of the global “autonaming” feature. But even when the text explicitly says “and according to Theorem 2.4.7...”, with humans being human, some readers will still focus on the “2.4.7” and begin a search for that number rather than the theorem with that number. With common counters, once 2.4.7 is a Theorem, there will never be an Example 2.4.7.

One counterargument is that it feels “wrong” to allow for an Example 2.4.9 and an Example 2.4.11 with no Example 2.4.10 existing in between. This violates our instinct to categorize and order objects. And perhaps the “missing” Example 2.4.10 will indeed cause some confusion to some readers. However, we suggest that such idealized views should be subservient to our goal of producing textbooks that provide a useful resource for the vast majority of our students.

We plan to allow figures and tables to use different counters, since they look obviously different, so you can quickly distinguish the previous, or next, item as you scan a page. Notice that it is their *distinctive appearance* that is the criteria for an independent counter. For example, numbers for displayed equations meet this criteria. They have their own counter, they are displayed distinctively when originally formatted, and a cross-reference emphasizes their distinctive type through the use of parentheses (e.g., Equation (2.4.7)).

Also, as an author, recognize that there is a very flexible mechanism for making lists of objects that may be included in the `<backmatter>`. To continue the example here, you could make a list of all the theorems in the book, and a separate list of all the examples. Each list would be in the order of appearance, include the number (and a title if you provide one). In HTML output, each is a knowl

which will quickly provide the content (independent of location), and also provides an “in-context” link to take you to the location for surrounding material. This useful feature requires very little additional effort, especially if you title your blocks as you author them.

I do not want my examples in knowls. You can change that! See the section on conversions in the Publisher’s Guide.

Why are my knowls empty? When viewing the HTML version on your laptop or local computer as files, do not expect knowls to render properly. This is a known bug/feature, and there is nothing to be done about it, unless you run a web server on your own machine, which fortunately is a very easy thing to do (see [Section 4.9](#)). Think of it this way: the knowl content comes from a server, but on your laptop there is no web server. You are just looking at files.

My L^AT_EX output has errors. Almost certainly your PreTeXt is not correct. Or your L^AT_EX syntax within a math element (`<m>`, `<me>`, and friends) is not correct. You have to be very deliberate to make legitimate PreTeXt that produces L^AT_EX that fails to compile. The converse is that L^AT_EX compilation is a good check on the quality of your PreTeXt, even if you do not care about print output for your project.

If the L^AT_EX error does not help you locate the problem, a good first step in this case is to validate your PreTeXt source—see [Chapter 5](#).

I have great output, but validation produces hundreds of errors. Success with a tool like `xsltproc`, in terms of no errors and great-looking output, does not mean your source is correct. XSLT processing can be forgiving, and many invalid constructions just work, and look great. But that is no guarantee this situation will continue, or the same happy accidents occur for a conversion to a different output format.

We do raise some errors during processing with `xsltproc`, but error-checking your input is a job for a validator, so in theory we should not ever produce any errors during a conversion. So strive for having 100% valid PreTeXt source, not simply great-looking results. See [Chapter 5](#) and [Appendix C](#).

I’d like to make one small adjustment in my output. There are no plans to make it easy to change one thing in the layout (such as changing the title of all sub-sub-sections from flush-left to centered). If you know enough, then you can hack such things yourself. But doing so is inadvisable, except in the case where you are the rare person who has done a lot of studying and put a lot of effort into learning book design. If that is the case, then it would be better to make a completely new layout and then share it so it is an option for other people to use. See [Principle 1.1.1:7](#).

Why does the HTML output load so many external resources? The subtext perhaps being, “Why shouldn’t I host these on my own server?” A main goal for PreTeXt is to spare authors the headaches of learning new technologies just so they can get their content in front of readers. That knowledge should be built into software, so an author can work at a higher level, explaining the intricacies of their discipline. So we only assume an author can place locally-built HTML output onto some public server they have permission to use. Any extra enabling technology we do not want to create ourselves gets pulled from other public servers. MathJax, both code and fonts, is a good example, as one of the enabling projects. Perhaps it is *the* enabling project.

This way,

- Authors can concentrate on their writing, not updating services on their server.
- Servers that are hostile to ad-hoc configurations (think “learning management systems”) are not an impediment to hosting projects.
- For the most part, updates to external resources happen automatically. This allows authors and PreTeXt developers to concentrate on other aspects of their work.

We get MathJax from a **content delivery network** (CDN). Once we have that dependency, then fonts and search from Google, CSS and Javascript from the American Institute of Mathematics, and other components, all have the same dependency: a decent internet connection. Our experience over

several years is that these resources have good uptimes and good bandwidth, and so are not a source of problems. A good offline version, with resources packaged via a script, would be a good long-term project.

Finally, we do not load minor resources indiscriminately. Something in your source should suggest they are necessary and we perform those checks, document-wide. However, since a cross-reference is usually implemented as a `knowl`, and we cannot be sure what a `knowl` might contain, we do tend to load resources on *every* page, even if only needed once. We hope to improve this situation. And you are encouraged to help if you have technical skills in these areas.

Searching my PDF output is broken. PreTeXt goes to great lengths to make a high-quality PDF, but if you manipulate it by adding in new pages, or adjust the intermediate L^AT_EX to use other fonts, you run the risk of breaking some of the features.

A ligature is a combination of two characters into one, like a lower-case “f” followed closely by a lower-case i without a dot. These can confuse a search. Verbatim text sometimes ends up with “smart” quotes, where left and right versions are inverted. This frustrates copying source code into an actual program. And so on. If you see problems like this with un-customized PDF output, we would like to hear about it.

Appendix B

(*) Text Editors

This appendix has information about using various text editors efficiently with MathBook XML source. The choice of an editor that suits you is a big part of being a productive author. Despite not being open source, we are partial to Sublime Text, due to its unlimited trial period, reasonable licensing (cost and terms), range of features, and cross-platform support. So we lead with Sublime Text, but also include Emacs and XML Copy Editor. A summary table of schema-aware editors can be found at [Section 5.7](#).

B.1 Sublime Text

Dave Rosoff

Sublime Text is a fast cross-platform editor with thousands of user-contributed packages implemented in its Python API. It is not free or open-source, although most of the user-contributed packages are both. Development is active as of June 2016.

Here, we outline several of the most important Sublime Text features that will help you to minimize your typing overhead and work more efficiently with your MathBook XML project. We also introduce the MBXTools package designed to help MathBook XML authors work more efficiently.

Sublime Text 2 and 3 are both available for an unlimited evaluation period, but a licence must be purchased for continued use. I have found the additional features of Sublime Text 3 to be well worth the cost of the license.

B.1.1 Settings

Sublime Text settings are stored and managed in a collection of JSON files as key-value pairs, in files that have a `.sublime-settings` extension. You change the settings by visiting these files and editing the values away from their defaults.

To edit your Sublime Text settings, you can use the Preferences/Settings — User menu (Sublime Text/Preferences... on OS X). Make sure that when you go to edit Settings, you always choose the User option. Changes to Default settings files will be overwritten when Sublime Text updates. It is recommended to use the Default files to see what settings are available to change. There are a lot, and not all are documented.

All Sublime Text users should be aware that a particular view (buffer) may receive settings in several different ways, e.g., from global default settings, from global OS-specific settings, from package-provided settings, from user-provided settings, and so on.

Key bindings are also stored in files with a similar format. There are only so many keyboard shortcuts available, although Sublime Text does support multistep shortcuts like Emacs. If you find that you wish to reassign shortcuts, this is certainly possible through the Preferences/Key Bindings — User menu (Sublime Text/Preferences... on OS X).

B.1.2 Package Control

Sublime Text’s Python API exposes a lot of the Sublime Text internals to plugin and package authors. Packages extend Sublime Text’s functionality, much like Emacs major modes. A package usually consists of some Python scripts that define Sublime Text events and actions, some text-based configuration files (XML/JSON/YAML files defining language syntax, symbol recognition, custom snippet insertion triggers and contexts, keybindings for new and old commands, etc.), and perhaps some other stuff too. These typically get bundled into a .zip archive that is disguised with the unusual extension `.sublime-package`. These archives live in the Packages directory, accessible via the Preferences menu (the Sublime Text/Preferences menu on OS X). Sublime Text monitors the Packages directory for changes and reloads all affected plugins on the fly.

The first thing you should do after installing Sublime Text is install the Package Control package. This package manager operates within Sublime Text to automatically fetch updates for packages you have installed (unless you disable this feature). You can also list currently installed packages, find new packages to investigate, remove packages, etc.

Thousands of user-contributed packages are available for easy installation via Package Control. It is possible to maintain packages by hand, since most package authors publish via GitHub, but Package Control is the universally recommended method of obtaining, managing, and removing packages for your installation.

1. Visit the [Package Control download site](#).
2. Find the Sublime Text console command (make sure the correct version of Sublime Text is selected) and copy it to the clipboard.
3. Open the Sublime Text console (Ctrl-`) and paste the command into the window that appears, then press Enter.

Having installed Package Control, you can use the command palette to deploy its commands, such as Install Package, List Packages, and Remove Package. See the documentation for more. A few packages that are especially useful are recommended throughout this section, and summarized in [Subsection B.1.9](#).

B.1.3 (*) Keyboard Shortcuts

To be written.

B.1.4 Project Management

Like many modern editors, Sublime Text has good project management features. These allow files that are part of a larger project to work together. For example, Sublime’s Goto Anything command allows quick access to any file in a project. The Find in Project command permits users to search and replace (with or without regular expressions) across an entire project. Matches are displayed in a text buffer and double-clicking opens the relevant file at the appropriate position.

The sidebar provides a convenient view of all of the files and directories in a project—or, if you like, a filtered view, where files of your choice are excluded. The MBXTools package ([Subsection B.1.7](#)) also makes some use of project-specific settings in order to provide some of its functionality.

B.1.4.1 The Open Folder Command

The easiest way to make use of the project management functionality is to store related files in a single directory and its subdirectories. If you then use the File/Open Folder... command, the entire directory is opened and all its subdirectories and files are shown in the sidebar. You can toggle the sidebar with either the command palette or directly with Ctrl+K, Ctrl+B (Cmd+K, Cmd+B on OS X).

By making use of this command you are already using project management, even if you never save your project. Sublime Text always has an implicit project open if you don’t open an explicit one. This is good enough for many users a lot of the time, since it provides the most useful feature (Find/Find in Project). The Goto/Go To Symbol in Project command is also useful, but not fully implemented in MBXTools ([Subsection B.1.7](#)). Some of the benefits of explicit project management are outlined below.

B.1.4.2 Explicit Projects

To save your project explicitly, use the Project menu to choose Save As Project... and choose an appropriate name and location. For a MathBook XML project, this would probably be the same name and location as the document root file. Use the Project menu commands to open and close your project.

There are a few benefits to using an explicit project to group files.

- You can group together files and folders in different parts of the filesystem, instead of being restricted to subtrees.
- You can have project-specific settings that are different from Sublime Text's defaults and different from your user preferences (`sublime-project-settings`).
- Sublime's project workspaces will remember which files you had open when you last closed the project, and at which positions.
- If you get very fancy, you can have multiple workspaces for the same project, with different filters and views for different purposes.
- It is fine to include `.sublime-project` files in Git repositories, but `.sublime-workspace` files should *never* be so included (according to the Sublime Text documentation).

B.1.4.3 Using the Sidebar

The project sidebar allows you to view the entire directory tree (rooted at the folder you opened with the Open Folder command), or, if you've opened an explicit project as described above, all of its files and folders. You can use the sidebar to copy, move, rename, delete, and duplicate files, for example, as well as opening them.

The package SideBarEnhancements is highly recommended (install via Package Control). It makes the sidebar much more useful.

An alternative to the sidebar that Emacs users especially will find helpful is the [dired package](#). The link is to a git repository since the package is no longer available from Package Control. This package allows you to browse the directory tree in a Sublime Text buffer. You can rename and move files within it—using all your favorite Sublime commands, including multiple selections ([Subsection B.1.5](#)). You might also try the SublimeFileBrowser package, which is actively maintained, available in Package Control, and seems to provide similar functionality.

B.1.5 Multiple selections

Multiple selections are the single most useful and irreplaceable feature of Sublime Text, the one that will keep you coming back. From the documentation:

Any praise about multiple selections is an understatement.

The base functionality of multiple selections is simple. Hold down the Ctrl key (Cmd on OS X), and click somewhere in the open view to get a second cursor. Continue to add more cursors. All of them will behave together when you type: text will be inserted, most snippets or other text commands function as usual, etc. Even mouse commands work in an intuitive way with multiple selections.

It is hard to explain exactly what makes multiple selections so powerful. You just have to try it for yourself. Here is a typical example. In a structured document, many bits of text occur quite frequently—element and attribute names, for example. You may want to update several occurrences of a fragment at once—making several identical changes. Sublime's Quick Add Next command (Ctrl+D/Cmd+D) makes this a snap.

1. Place the caret somewhere in the word you'd like to modify.
2. Use Quick Add Next to expand your (empty) selection to the current word.
3. Use Quick Add Next again to add the next instance to the selection, which will then typically be disconnected.

4. Continue to Quick Add Next as many times as you like. Use Quick Skip Next (`Ctrl+K`, `Ctrl+D/Cmd+K`, `Cmd+D`) to jump over instances you would like to leave alone. If you go too far and select in error, hit `Ctrl+U/Cmd+U` to undo.
5. Make your modification, only one time.

Another example that occurs frequently when authoring XML is when you use the Wrap with Tag snippet (`Alt+Shift+W/Ctrl+Shift+W`). This snippet wraps the selection(s) in a `<p>` tag, with the tag name highlighted in both the start and end tags. If the `p` element is not what you wanted, just type. Both tags are replaced. This is a huge benefit to the XML author that makes essential use of multiple selections, even though you are barely aware of this as you use the feature.

Column selection allows you to select a rectangular area of a file. This is unbelievably useful when editing a structured document. There are lots of ways to do it (see the [Sublime Text documentation](#) for a mostly exhaustive list), but the most frequently used is to hold down `Shift` while clicking and dragging with the right mouse button (on OS X, hold down `Option` while dragging with the right mouse button). See the documentation for keyboard-based shortcuts.

Column selection becomes even more useful when used in combination with the keyboard shortcuts for moving and selecting, such as `Ctrl+Shift+Right` (select to end of word) and `Shift+End` (select to end of line).

Yet another example of the appallingly great utility of multiple selection comes when copying and pasting from a different file format. Suppose you have copied some lines of text and wish each such line to become a list item in your MathBook XML source.

1. Use column selection, as described above, to select each line individually.
2. Use Wrap with Tag to wrap each of the selected lines with matched begin/end `` tags, all at once.
3. Now you have to select the lines again, to wrap them with matched begin/end `<p>` tags. First, hit `Shift+End` to select to end of line.
4. If your lines are wrapped, you may need to hit `Shift+End` again to get to the end of the wrapped lines.
5. Now you've selected too far: the `` are selected as well. Hold down `Ctrl+Shift` and hit the left arrow twice (unselect by word). (After a little practice, steps like this seem automatic.)
6. Use Wrap with Tag to wrap each of the selected lines with matched begin/end `<p>` tags, all at once.

This does take a little mouse-work, but the keystroke savings can be considerable. (The Emmet package, described in [Subsection B.1.6](#), provides an even quicker way to do this task and much more complicated ones.)

There are so many incredibly handy ways to use multiple selections that we will forgo any further examples to leave the reader the pleasure of discovering her own favorites. One particularly helpful package is Text Pastry, which provides some autonumbering and text insertion commands that work nicely with multiple selections. There are also a handful of packages that extend multiple selection functionality, such as PowerCursors and MultiEditUtils. PowerCursors allows you to add cursors and manipulate them without using the mouse. MultiEditUtils provides additional text processing commands designed to work with multiple selections.

B.1.6 Emmet

Emmet is the most downloaded plugin for Sublime Text (1.82 million installs via Package Control). It is mostly used by HTML and CSS authors and provides a lot of functionality for them. It is also useful for writing XML, as we see below. The main benefits of working with Emmet are ease of tag creation, manipulation, and removal.

Emmet by default overrides Sublime's binding for the `Tab` key, endowing it with new behavior (the command Expand Abbreviation). This new behavior is to create a matching XML tag pair for whatever word is to the left of the caret, or with whatever words are selected. For example, if you were to type "ol" and press the `Tab` key, the resulting text would be

```
<ol></ol>
```

with the caret positioned between the two newly created tags. Pressing `Tab` a further time moves the caret to the right of the end tag.

Emmet will produce any word it does not recognize into a matched tag pair when the Expand Abbreviation command is run. Some XML elements are empty, though. Within a matched tag pair, the command Split/Join Tag (`Ctrl+Shift+`/Cmd+Shift+``) will contract it into an empty tag, removing any text between the existing begin and end tags. (If the caret is *inside* a tag for an empty element, this command replaces the empty element with a matching begin/end tag pair.)

The default behavior (creating tag pairs whenever `Tab` is pressed) interferes with Sublime Text's usual Tab-completion, which may be undesirable. It may be disabled by setting

```
"disabled_keymap_actions": "expand_abbreviation_by_tab"
```

in the Preferences/Package Settings/Emmet/Settings — User file. The functionality of Expand Abbreviation will still be available through `Ctrl+E`.

For a more involved example of abbreviations, suppose you have pasted the items of an ordered list. Now you need to structure it with `ol`, `li`, and so on.

Lists are often good.

You can provide list items with `<c>@xml:id</c>`.

You probably don't want to number them, though.

The desired output is:

```
<ol>
  <li xml:id="item1">Lists are often good.</li>
  <li xml:id="item2">You can provide list items with <c>@xml:id</c>.</li>
  <li xml:id="item3">You probably don't want to number them, though.</li>
</ol>
```

Using Emmet, one produces it by executing the Wrap as you Type command (`Ctrl+Shift+G/Ctrl+W`) and entering the following expression in the minibuffer.

```
ol>li[xml:id=item$]*>p
```

The `>` symbol denotes a child element, the square brackets (with or without assignment) denote an attribute list, the `$` provides the line-based numbering, and the `*` specifies wrapping each selected line with the indicated subtree (so each line is wrapped with `<p>`, instead of the entire selection).

Emmet can produce a large hierarchy of nested XML tags at various levels using this abbreviation syntax. For example, suppose you know that you will need to produce a tag structure of the following form.

```
<section xml:id="">
  <introduction>
    <p></p>
  </introduction>
  <subsection xml:id="">
    <p></p>
    <p></p>
    <figure></figure>
    <p></p>
    <ol>
      <li></li>
      <li></li>
      <li></li>
    </ol>
  </subsection>
</section>
```

```

    <p></p>
  </conclusion>
</section>

```

Admittedly, this is a bit much, but it makes the point. The Emmet “abbreviation” for this structure is:

```
section[xml:id]>introduction>p^(subsection[xml:id]>p*2+figure+p+ol>li*3)^conclusion>p
```

Upon typing this string and placing the caret to the right of it, hit `Ctrl+E` (or `Tab`, if you didn’t disable the Emmet default). The entire tree structure is created immediately, with tab stops for the missing attribute values and for each matching begin/end pair.

The Expand Abbreviation As You Type command allows you to tweak such abbreviations interactively. Hit `Ctrl+Alt+Enter` and type the expression above into the minibuffer at the bottom of the window, watching the tree appear as you type.

Emmet is a very powerful package that can do much more than is outlined here. However, it is by default mostly adapted to writing CSS and HTML. Customizing it to work more directly with MathBook XML is an ongoing project. You can discover more about Emmet by examining the [Emmet documentation](#) or poking around in the Settings and Keymap files.

B.1.7 MBXTools—a Sublime Text package for MathBook XML

MBXTools is a Sublime Text package designed to assist authors using MathBook XML. It is very experimental and may behave unexpectedly.

The package owes its inspiration and much of its code to the excellent [LaTeXTools](#) package. Please let the author know of any bugs you find or any features you would like to see included in MBXTools by [creating a GitHub issue](#).

B.1.7.1 Installation

via Package Control It is recommended to install MBXTools via [Package Control](#). If you have not installed Package Control yet, you should do that first (and restart Sublime Text afterward).

After Package Control is installed, use the `Install Package` command to search for the MBXTools package, and select it from the Quick Panel to install. This method of installation allows Package Control to automatically update your installation and show you appropriate release notes.

via git You may also install MBXTools via `git`. Change directories into your Packages folder. To find the Packages folder, select Browse Packages from the Preferences menu (from the Sublime Text 3 menu on OS X). Make sure you are in the Packages folder and *not* Packages/User.

Then, run

```
git clone https://github.com/daverosoff/MBXTools.git
```

and restart Sublime Text (probably not necessary).

B.1.7.2 Usage

You can activate the package features by enabling the MathBook XML syntax. The syntax definition looks for `.mbx` file extensions, which most of us do not use (yet?). If your MathBook XML files end with `.xml`, you will either need to add a comment to the first line of each file (after the XML declaration):

```
<!-- MBX -->
```

or you will need to enable the syntax manually using the command palette. To enable it manually, open a MathBook XML file and press `Ctrl+Shift+P` (`Cmd+Shift+P` on OS X) and type `mbx`. Select “Set Syntax: MathBook XML” from the list of options.

You should see the text “MathBook XML” in the lower right corner if you have the status bar visible (command palette: `Toggle Status Bar`).

There are only a few features implemented so far.

1. If you have some sectioning in your MBX file, hit `Ctrl+R` (`Cmd+R` on OS X) to run the Go To Symbol command. You should see a panel showing all the divisions' `@xml:id` names.
2. If you have been using `@xml:id` to label your stuff, try typing `<xref ref=`" (the beginning of a cross-reference). Sublime Text should show you a panel containing all `@xml:id` values along with the elements they go with. Choose one to insert it at the caret and close the `xref` tag. Alternatively, type `ref` and hit `Tab` to activate the `xref` snippet. Then hit `Ctrl+l` followed by `x` or `Ctrl+l` followed by `Ctrl+Space` to bring up the completions menu. There are several variants of the `ref` snippet, namely `refa`, `refp`, and `refpa`.
3. Type `chp`, `sec`, `ssec`, or `sssec` and hit `Tab` to activate the division snippets. A blank `title` element is provided and the cursor positioned within it. As you type, the `@xml:id` field for the division is filled with similar text mirroring the title you are entering.

B.1.7.3 Known issues

1. When manually adding an `xref` (not using the snippets or autocomplete), you will frequently see a spurious "Unrecognized format" error.
2. The `ref` snippet does not bring up the quick panel. Should it?
3. Recursive search through included files for labels is not yet implemented.
This will only work for `xref` completion, not Go To Symbol.
4. Nothing has been tested on OS X or Linux.

B.1.8 (*) Sublime Linter

To be written.

B.1.9 Recommended Packages

1. Package Control
2. Emmet
3. SideBarEnhancements
4. PowerCursors
5. MultiEditUtils
6. Text Pastry
7. Git or SublimeGit
8. SublimeLinter
9. MBXTools

B.2 emacs

Jason Underdown reports on 2016-05-12 that emacs' [nXML mode](http://www.gnu.org/software/emacs/manual/html_mono/nxml.html) works well with a RELAX-NG schema. While we work on building a hand-crafted RELAX-NG schema, you can use the [trang](http://www.thaiopensource.com/relaxng/trang.html) tool to convert the PreTeXt DTD to a RELAX-NG schema.

You simply put your cursor at any point in the document, start a new tag with `<` and then call the `completion-at-point` function (I bound it to the key-chord: `C-<return>`) to get a list of possible completions. Or you can start typing a few characters to narrow the list of possibilities. It will also let you know if the element you are trying to insert is invalid.

—Jason Underdown

B.3 XML Copy Editor

Michael Doob reports on 2017-02-03 that [XML Copy Editor](http://xml-copy-editor.sourceforge.net) works well, in particular on Windows. This is an open source program, for Windows and a variety of popular Linux distributions, that supports both DTD and RELAX-NG schemas. It is less of a general programmer's editor and more like dedicated tools for working strictly with XML documents.

B.4 (*) vi, vim

Contributions welcome.

Appendix C

Schema Tools

This appendix has technical information about tools that work with the RELAX-NG schema.

C.1 Jing and Trang

These tools come from James Clark, an author of the RELAX-NG syntax. `trang` is a converter between different formats for schemas. An author should not need it. A PreTeXt developer might find it useful, and it is a by-product the `jing` install described below, and is also packaged for Debian and Ubuntu Linux (which is how we use it).

`jing` is our recommendation for validation by authors, and works very well. It is also packaged for Debian and Ubuntu Linux. Reports of other similarly easy installations for other operating systems are especially welcome. We have only used the installation from source described below, so in particular have not tested `xinclude` support in the packaged versions.

Installation notes for `jing` and `trang` follow.

Clone Clone the git repository at github.com/relaxng/jing-trang. You will end up with a new `jing-trang` directory, which we reference below in a relative fashion.

readme.md Follow the instructions in the top-level `readme.md`, observing the following notes keyed to the four steps. These helpful notes come courtesy of Jahrme Risner, Mitch Keller, Bruce Yoshiwara, Ken Levasseur, and Jessica Sklar.

- 1. JDK** It is necessary to have a version of `java` on your machine. Try `which java` to see if one is already available. Any output here might help in the next step. JDK is the Java Development Kit.
- 2. JAVA_HOME** You will need to have this environment variable set correctly. You can see if `echo ${JAVA_HOME}` on Linux to see if it produces anything sensible and/or consistent with Step 1. Ken Levasseur notes that on OSX you can go

```
echo $(/usr/libexec/java_home)
```

and the output is what you set to the `JAVA_HOME` variable.

On Windows you may need to set Environmental Variables in the Windows System Properties GUI, here and in Step 4.

- 3. Root Directory** This should not cause any particular difficulties.

- 4. ANT** You may need to install this tool, almost certainly on Windows. Again, on Windows you may need to set an `ANT_HOME` environment variable. On Linux, this may be all set for you already as a system tool.

The README suggests changing slashes on Windows. But you may already be using a shell that gives Unix-like behavior. So try both directions, if necessary. Also, the README suggests running `./ant`

test (or `.\ant test`). Doing this on Windows may yield a BUILD FAILED message, but jing may still work.

Results Change into the build subdirectory. You may have more files here, but the two you really want are `jing.jar` and `trang.jar`. So if you have these, you are in good shape.

If you have modularized your source files (Section 4.2) then you need one more library. Look in the top-level `lib` directory (a peer of `build`) for `xercesImpl.jar`. You have two and a half choices now.

Copy `lib/xercesImpl.jar` into `build`.

Or make a “symbolic link” to the third JAR archive. Be sure you are in `build` and go

```
ln -s ../lib/xercesImpl.jar
```

which will just make your operating system think this third archive is in the `build` directory.

A third option would be to adjust/augment some classpath information below and send us a report of success. We have not tested this.

Now you are ready to use `jing` to validate a PreTeXt document. Note that the commands below require the XML version of the schema, which is the non-compact version.

For a document contained in a single file, run (with suitable working directory and path prefixes).

```
java -jar jing-trang/build/jing.jar pretext.rng my-book.xml
```

For a document modularized across several files using the `xinclude` mechanism, issue as one single command line (again, with suitable working directory and path prefixes). This presumes you have moved or symlinked the `lib/xercesImpl.jar` file into the `build` directory. Do not leave any spaces around the equals-sign, we have split that line there for readability, so the `-D` option should not have any spaces in its argument.

```
java -classpath jing-trang/build
-Dorg.apache.xerces.xni.parser.XMLParserConfiguration=
  org.apache.xerces.parsers.XIncludeParserConfiguration
-jar jing-trang/build/jing.jar pretext.rng my-book.xml
```

It may go without saying that scripting this task will make you more likely to do it as often as is necessary and you will save yourself much time and a little frustration in the process.

Jahrme Risner provides the following setup he uses to make it very convenient to regularly validate his sources. This is a “shell script”, which a Linux user might add to their `~/.bashrc` file. Note that we have again split the line with the `-D` option at the equals-sign, without a line-continuation character. Do not do that in your version.

```
ptx-check() {
  java\
    -classpath ~/GitHub/jing-trang/build\
    -Dorg.apache.xerces.xni.parser.XMLParserConfiguration=
      org.apache.xerces.parsers.XIncludeParserConfiguration\
    -jar ~/GitHub/jing-trang/build/jing.jar\
    ~/GitHub/mathbook/Schema/pretext.rng "$1"
}
```

Then he can simply go

```
~ $ ptx-check my-book.xml
```

at anytime. Note that you might have to provide or adjust some of the paths above for your situation. And there are other ways to script tasks like this.

Appendix D

Revision Control: git

Authoring a textbook without revision control is like driving without a seat belt. Sooner or later, you will wish you had used it. `git` is a popular program for revision control for software projects, and works quite well with PreTeXt, though not perfectly. Notes here are designed to help. For more on `git` itself, in the context of authoring a book, see [Git for Authors](#), by Robert Beezer and David Farmer at mathbook.pugetsound.edu/gfa/html.

Word Wrap `git` is designed for code, where a newline often expresses the end of a statement. In PreTeXt, it might make sense to author an entire (long) paragraph without any newlines. If so, a line-oriented file diff is not so useful. Fortunately, `git` has a flag, `--word-diff`, which does an excellent job of displaying small edits precisely.

Messages for Commits and Merges When you make a commit or merge, you can supply a message at the command line with the `-m` argument. Otherwise you get thrown into an editor, with the default being `vi`, which can be hard to get out of if you have not used it before. Better, as Joe Fields suggests, is to tell `git` which editor you want to use. To set `pico` as the default editor, the one-time command-line incantation would be:

```
git config --global core.editor "pico"
```

You can also directly edit the configuration file at `~/.gitconfig`. More suggestions can be found on [this thread](#) on StackOverflow at stackoverflow.com/questions/2596805.

Appendix E

Windows Installation Notes

Dave Rosoff

This appendix explains the best known way to install the PreTeXt toolchain in a Windows environment, rather than a Unix-flavored operating system (such as Linux and Apple’s OS X). It has been tested on Windows 7, 8, and 10. We assume that none of the listed tools or equivalents have been previously installed. That may complicate matters. This is especially true if you use Cygwin, or if you have already installed Python on your machine. PreTeXt compatibility with existing Python installations is addressed elsewhere in this document ([python-mbx-compatibility](#)).

If you have Windows 10, be sure to read about WSL in [Appendix F](#), which could be a whole lot easier to setup and maintain.

E.1 Setup

In this section, we do some initial setup, establish notation, and issue warnings. Some of the steps in this process are dangerous. Typos could lead to an unstable system, or possibly even to unrecoverable system errors. Double-check everything.

E.1.1 Notation

Strings enclosed in `<angle brackets>` are variables whose values you should substitute in typed expressions. `<username>`, for example, should be replaced with your Windows username (e.g., mine is `drosoff`). Throughout this installation process it is very important to pay attention to the direction of slashes `/` and backslashes `\`.

E.1.2 Initial Windows setup

It is easier to see what is happening if your Windows file browser is not set up to hide file extensions from you. Disable the “hide file extensions” behavior before proceeding. In Windows 7/8, this can be done through the Control Panel. In Windows 10, there is a checkbox somewhere in the ribbon for it.

- On Windows 7 or 8:
 1. Open the Start Menu and type “Control Panel”. Select the Control Panel entry from the popup list.
 2. Type “Folder Options” into the search box in the Control Panel window. Select Folder Options when it appears.
 3. Select the View tab.

4. Uncheck the box for “Hide extensions for known file types”.
 5. Click OK until there are no more OKs to click.
- On Windows 10:
 1. Open the Start Menu (icon shaped like a Window at the bottom left, typically). Select the File Explorer option, right above Settings, from the popup list.
 2. Click on this, and then select View from the “ribbon lists” of options along the top.
 3. After clicking this, on the right there should be a check box for “File Name Extensions”. Click this box; that should do it.

E.1.3 A word on path names

An appallingly large fraction of the difficulties of using GNU/Linux-based utilities with Windows come from the differences in formatting path names. Windows path names begin with a drive letter (usually “C”) and a colon. Like all path names, they describe a path in a rooted tree. The root directory (folder) in Windows is called `\`, a backslash. Note the direction carefully. Children of the root node are either subdirectories or files in the root directory (leaves). The path to my downloads folder is:

```
C:\Users\drossoff\Downloads\
```

The trailing backslash is often unnecessary, but it is an easy way to see immediately whether a path name refers to a file or to a directory. Windows path names are not case-sensitive.

Linux/Mac OS X path names are quite similar, but lack drive letters, start with an explicit reference to the root, use forward slashes, and are case-sensitive (more or less so, in Mac’s case). A path to a typical Linux user’s download folder might be

```
/home/typical.username/Downloads
```

Again, Linux pathnames are case-sensitive and Mac OS X pathnames are typically ‘case-preserving’. The Git Bash shell for Windows is an emulation of a Linux environment, and the utilities within it expect path names that follow Linux conventions. So we conform to this expectation as follows.

1. Remove the colon, but keep the drive letter.
2. All backslashes `\` become slashes `/`.
3. Add an initial slash preceding the drive letter.

The path name to my Windows download folder becomes

```
/c/users/drossoff/Downloads
```

Even though Git Bash is pretending to be a Linux shell, path names are still the underlying Windows path names, and therefore are not case sensitive. You can verify this using tab-completion.

Path names that begin with the drive letter (Windows) or the root `/` (Linux/Mac OS X) are called **absolute path names**. Their referents do not depend on the location from which the path name is invoked. **Relative path names**, on the other hand, begin in the so-called **current working directory**. A relative pathname might look something like this:

```
../../examples/sample-article/sample-article.xml
```

The symbol `..` is a shortcut for the parent of the current directory. Thus, the relative path name above means from where we are, ascend two levels, then descend into the `examples` and `sample-article` subdirectories, and find the file `sample-article.xml`.

Path names that contain spaces are *evil*, and should be avoided in many cases. Unfortunately, all Windows default program installation locations contain at least one space (directory name “Program Files”). This does not appear to cause problems, except when installing ImageMagick (Section E.5). To be extra careful, you could always choose an installation location that is free of space characters.

E.1.4 Do I have 64-bit Windows?

Find out on Windows 7:

1. Open the start menu and type “Computer”. Right-click the Computer item in the popup menu.
2. Select Properties from the drop-down menu.
3. Read in the right-hand side of the pane to find the “System” heading.
4. From the “System type” entry, read whether you have a 32- or a 64-bit OS.

Now you are ready to begin installing the various pieces of the PreTeXt puzzle. The first one, `xsltproc` (Section E.2), is the most annoying. You might want to go get a snack or another cup of coffee.

E.2 Installing `xsltproc`

E.2.1 `xsltproc` binaries

This is the most annoying part of the installation. Obtain four zip archives from [Igor Zlatkovic’s FTP site](#) that hosts the most recent Libxml binaries for Windows. At the time of this writing, the 64-bit binaries were considered experimental. I have had no trouble using the 32-bit binaries on my 64-bit Windows 7 system, so I suggest that all MBX users download the most recent 32-bit version of the following libraries:

1. `iconv` (filename something like `iconv-1.9.2.win32.zip`)
2. `libxml2` (filename something like `libxml2-2.7.8.win32.zip`)
3. `libxslt` (filename something like `libxslt-1.1.26.win32.zip`)
4. `zlib` (filename something like `zlib-1.2.5.win32.zip`)

We only need a handful of files from these archives. So the simplest thing is to leave them in your Downloads folder and grab what we need. Create a new folder `C:\xsltproc` (it can be anywhere, as long as it’s a new location). We’ll call this location `<xsltproc>` in case you named your folder something different.

Extract the following files from the four zip archives you downloaded above into `<xsltproc>`:

1. From `iconv-*.win32.zip`:
 - (a) `iconv-*.win32\bin\iconv.dll`
2. From `libxml2-*.win32.zip`:
 - (a) `libxml2-*.win32\bin\libxml2.dll`
 - (b) `libxml2-*.win32\bin\xmllint.exe`
3. From `libxslt-*.win32.zip`:
 - (a) `libxslt-*.win32\bin\libxslt.dll`
 - (b) `libxslt-*.win32\bin\libxslt.dll`
 - (c) `libxslt-*.win32\bin\xsltproc.exe`

4. From `zlib-*.win32.zip`:
 - (a) `zlib-*.win32\bin\zlib1.dll`

E.2.2 Change PATH environment variable

Note: if you prefer not to meddle with this, it can be avoided. Now, we need to make sure your system can find these files when we need them.

1. Open the Start menu and start typing “Edit the system environment variables”. Select this option when it becomes visible.
2. Click the Environment Variables button near the bottom of the dialog.
3. In the bottom part of the dialog labeled “System environment variables”, look for a variable named PATH. You may need to scroll.
 - (a) If you do not find one, create it using the New... button. Make sure to use all capital letters. (This really shouldn’t happen. Make sure you are editing the *system* environment variables, not the *user* environment variables.)
 - (b) If you do find the PATH variable, select it and click the Edit... button.
4. Regardless of which of steps 1 and 2 you followed, now you should see a dialog with two text fields. Your variable name should be PATH.
5. If you created this variable, populate the second field with the full path name of `<xsltproc>`, the location where you put the seven files from Igor’s zip archives. For me this looks like `C:\xsltproc`.
6. If you are editing the PATH variable, place the cursor in the existing value and press the End key, so that the cursor moves to the back of the line. The PATH string is a ;-delimited list of full path names, so append the string `<xsltproc>;` (note the semicolon) to the existing value. If you named `<xsltproc>` as we suggested above, then the last part of your PATH variable is now `C:\xsltproc;`.
7. Click OK to save changes.

Congratulations, you have successfully installed `xsltproc`.

Note that you have installed the `xmllint` utility as part of this procedure. This utility will allow some text editors to **lint** your PreTeXt files, that is, to automatically detect and highlight errors, and perhaps even to explain them.

E.3 Installing git

In this section we install the `git` version control system and some tools to interact with it, including a fairly full-featured emulation of the `bash` command line shell. I strongly recommend you use the Git Bash shell or another `bash` emulation, so that you can use Linux commands referenced elsewhere.

One feature in particular, `pdfcrop`, has not been made to work in the normal Windows `cmd` shell, although the rest of PreTeXt has. To generate images using the `mbx` script [Section 8.9](#), you will need the Git Bash shell or something like it.

E.3.1 Steps to install git

1. Visit the official [git download page](#) (download starts automatically) and obtain the latest binary for your system.
2. Find the installer in your Download location and run it.
3. Choose whatever location you like for the `git` installation folder. I recommend you use the default.
4. At the “Adjusting your PATH environment” dialog, select either of the first two items. I recommend the second, “Add `git` executable to Windows PATH”. This will allow you to use `git` from within other Windows programs, such as Sublime Text or other text editors, which can be extremely convenient. If you are apprehensive about adding `git` to the Windows PATH, select the first option. I do not recommend the third option.
5. Accept the default options for all the remaining prompts.

E.3.2 Changing the path with `.bashrc`

In [Subsection E.2.2](#), we promised that you could avoid messing with the Windows environment variables. If you install something else later that wants to use `xsltproc`, then this might not be the best idea. But if you are only going to use it from within Git Bash, then this will work fine.

From the Git Bash command prompt, enter this line of text and hit Enter. Do not make any typos. You should substitute your value of `<xsltproc>` where indicated, but make sure to conform to the conventions at the end of [Subsection E.1.3](#) regarding Windows path names in Git Bash. (I warned you this was going to be annoying.)

```
echo "export PATH=<xsltproc>:$PATH" >> ~/.bashrc
```

You may get a message from Git Bash the next time you run it about `.bash_profile`, which you may safely ignore.

Congratulations, you have successfully installed `git`.

E.4 Installing Anaconda

Anaconda is a well-regulated development environment for Python under Windows, and I recommend it for users who do not already have Python installed. The essential `mbx` script has [recently been updated](#) to support both Python 2 and Python 3. Therefore we make no recommendation about which Python version to choose.

If you already have a working Python installation, skip to [Section E.5](#).

You have some choice with your Anaconda installation. It actually supports the installation of several independent Pythons side-by-side (since both 2.7 and 3.x are in active use, this is more reasonable than it seems). If you do not need Python for anything else or are simply a minimalist, Miniconda is also an option. Miniconda installs no packages, but these can be installed via the `conda` utility at the command line later.

1. Download either Miniconda, Python 2.7, or Python 3.5 from the [Anaconda download page](#).
2. Run the installer and accept all the default suggestions.

Congratulations, you have successfully installed Python.

If you do not care about images, you can stop here. Much of the MBX functionality is already present. However, to use the `mbx` script to create SVG images from sources like PDF/PNG images, Sage, Asymptote, or TikZ, you need to install ImageMagick and Ghostscript using the directions in [Section E.5](#) and [Section E.6](#).

E.5 Installing ImageMagick

Visit the [ImageMagick downloads page](#) and grab a binary. If you have a 64-bit Windows installation ([Subsection E.1.4](#)), use the recommended version. If you have a 32-bit installation, find the version whose filename is obtained from that of the recommended version by substituting `x86` for `x64`. For example, if the recommended version's filename is:

```
ImageMagick-7.0.1-6-Q16-x64-dll.exe
```

then a good choice for a 32-bit Windows would be

```
ImageMagick-7.0.1-6-Q16-x86-dll.exe
```

1. Run the installer from your download location.
2. Accept the license agreement.
3. Choose a default installation location that has no spaces in its folder name. The default choice “Program Files” causes problems because of path name issues. I chose

```
c:\ImageMagick-7.0.1-Q16\
```

It matters because the ImageMagick utility `convert` is used by the `mbx` script to convert your images into different formats. The `mbx` script will have a lot of trouble with path names that contain spaces.

4. When confronted with “Select additional tasks”, make sure that the boxes for “Add application directory to your system path” and “Install legacy utilities” are checked.
5. If you like, carry out the procedure to verify your installation.

Congratulations, you have successfully installed ImageMagick.

E.6 Installing Ghostscript

Visit the [Ghostscript download area](#) and download the most current binary for either 64-bit or 32-bit Windows ([Subsection E.1.4](#)). Run the installer. You can accept almost all the default options. As with ImageMagick ([Section E.5](#)), it is probably best to choose an installation location whose path name is free of spaces, such as `c:\gs`. We refer to this installation location as `<gs>` below.

E.6.1 Change PATH environment variable

The `pdfcrop` utility needs to be told which Ghostscript command to use. We need to add the file `gswin64c.exe` to the Windows PATH. This is similar to what is done above, in [Subsection E.2.2](#).

1. Open the Start menu and start typing “Edit the system environment variables”. Select this option when it becomes visible.
2. Click the Environment Variables button near the bottom of the dialog.
3. In the bottom part of the dialog labeled “System environment variables”, look for a variable named PATH. You may need to scroll.
4. If you do find the PATH variable, select it and click the Edit... button.
5. You should see a dialog with two text fields. Your variable name should be PATH.
6. Place the cursor in the existing value and press the End key, so that the cursor moves to the back of the line. The PATH string is a ;-delimited list of full path names, so append the string <gs>; (note the semicolon) to the existing value. If you named <gs> as we suggested above, then the last part of your PATH variable is now C:\gs;.
7. Click OK to save changes.

Congratulations, you have successfully installed Ghostscript.

E.7 Installing pdf2svg

The installation procedure uses `git`. Open Git Bash and change to your root directory:

```
cd /c
```

Clone the repository into C:\pdf2svg:

```
git clone https://github.com/jalios/pdf2svg-windows.git pdf2svg
```

E.7.1 Change PATH environment variable

We need to add the `pdf2svg` program to the Windows PATH. This is similar to what is done above, in [Subsection E.2.2](#) and [Subsection E.6.1](#).

1. Open the Start menu and start typing “Edit the system environment variables”. Select this option when it becomes visible.
2. Click the Environment Variables button near the bottom of the dialog.
3. In the bottom part of the dialog labeled “System environment variables”, look for a variable named PATH. You may need to scroll.
4. If you do find the PATH variable, select it and click the Edit... button.
5. You should see a dialog with two text fields. Your variable name should be PATH.
6. Place the cursor in the existing value and press the End key, so that the cursor moves to the back of the line. The PATH string is a ;-delimited list of full path names, so append the string C:\pdf2svg\dist-32bits; or C:\pdf2svg\dist-64bits; (note the semicolon) to the existing value.
7. Click OK to save changes.

Congratulations, you have successfully installed pdf2svg.

E.8 What's Missing

Development of a Windows-compatible mbx script ([Chapter 8](#)) is mostly complete. If you need help with mbx, contact Dave Rosoff. There are still a few use cases that haven't been tested, mostly those to do with Asymptote.

At present, it only seems to be possible to install Sage on Windows by way of the Windows Subsystem for Linux, available only in Windows 10.

If you find any problems or bugs, please let us know at the PreTeXt Support group in Google Groups, or email [drosoff AT collegeofidaho DOT edu](mailto:drosoff@collegeofidaho.edu).

Appendix F

Windows Subsystem for Linux

With Windows 10 you can install the **Windows Subsystem for Linux** (WSL). This is basically Ubuntu Linux (one of the most popular versions of Linux) integrated into Windows 10 in a way that command-line Linux programs can be executed easily. News and announcements can be found at <https://msdn.microsoft.com/commandline/wsl/about> (msdn.microsoft.com/commandline/wsl/about). Michael Doob reports on 2017-06-02 that this works quite well for the programs necessary to author with PreTeXt, and provides the following help.

Installing WSL If you have the “Anniversary Edition” of Windows 10 (later than August 2016), then installing WSL is not difficult. Just follow the (reasonably straightforward) instructions given by Microsoft at the address https://msdn.microsoft.com/en-us/commandline/wsl/install_guide.

Upon completion of the installation, you should

- be able to use the `bash` command from the PowerShell window,
- have your own WSL userid (distinct from Windows),
- have your own WSL password (distinct from Windows).

A little background about using about the command line

- You type in commands (terminated by the Enter key) and the operating system responds. For example, if you type in `date`, the operating system responds with (what it considers to be) the date. Using the command line is an ongoing conversation between you and the operating system.
- The `sudo` command: when a command starts with `sudo`, the rest of the command is executed with administrative privileges. This is needed, for example, to install software or update the operating system. You must give your password when you run `sudo` (although you get a little window of time after the first usage when it is not necessary to do so).
- The `sudo apt-get update` command: this is used to resynchronize the local listing of installed packages with those in the official repository.
- The `sudo apt-get upgrade` command: this is used to bring all the local software up to date with those in the official repository.

Run `sudo apt-get update` followed by `sudo apt-get upgrade` with a new system to bring it up to date. It is a good idea to repeat this frequently to have the latest software on your computer.

Installing software The default configuration of WSL does not have the software needed for creating documents with PreTeXt. There are a few commands to be run before you can get started.

- The program **git** is used to download the PreTeXt software onto your local computer. It is installed with the command `sudo apt-get install git`.
- The program **xsltproc** is used to create your readable documents. It is installed with the command `sudo apt-get install xsltproc`.

After these are installed, you are ready to set up PreTeXt.

Putting PreTeXt on your computer Here are the steps necessary to get the PreTeXt software onto your computer:

- Make a new directory `mkdir mathbook`
- Make your own clone of the PreTeXt repository `git clone https://github.com/rbeezer/mathbook.git`
- Move to the new directory `cd mathbook`
- Initialize the new directory with `git pull`

This last command synchronizes your files with those in the official repository. You should run it frequently to keep your files up to date.

The simplest example Here is a brief description of the use of WSL to create readable files. You, as the author, create the XML file. The system will contain an appropriate XSL file that translates your XML file to something readable.

Several editors come with WSL by default including NANO, PICO, VI, and VIM. Here are the steps to follow:

1. Type the command `cd` to align yourself in your home directory.
2. Use one of the editors to create a file called `hw.xml` (you could use the command `nano hw.xml`), and add the following text:

```
<?xml version="1.0" encoding="UTF-8" ?>
<mathbook>
  <article xml:id="hw">
    <p>Hello, World!</p>
  </article>
</mathbook>
```

3. Run the command `xsltproc mathbook/xsl/mathbook-html.xsl hw.xml` Upon completion, you should have a file called `hw.html`.
4. Now the tricky part: you want to view the `hw.html` file in a browser, but the usual Windows programs cannot see the files created within WSL. So we have to copy them to a place where they are visible. Fortunately, this is pretty easy to do. To put `hw.html` on your desktop, use the command `cp hw.html /mnt/c/Users/username/Desktop` (note that “username” must be replaced by your Windows user name). Once the file is on the desktop, a double click will open it in a browser.

The `edit-xsltproc-view` cycle just given may seem daunting at first blush. Some things that can help:

- Pressing the up arrow when at the command line displays the previously executed commands. Hitting the enter key while such a command is displayed executes it. This saves a lot of retyping.
- It is possible to define aliases to shorten commands. Your local Linux guru can show how this is done.
- It is possible to define scripts to shorten multiple commands. Your local Linux guru can show how this is done.

Appendix G

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