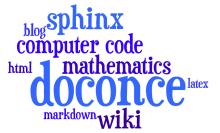
Scientific Writing and Publishing for the Future

Hans Petter Langtangen

Sep 22, 2015



Challenges with tools for scientific writing

Pros and cons of various tools

3 DocOnce: Write once, include anywhere

4 A tour of DocOnce

Challenges with tools for scientific writing





Scientific writing = LATEX

- Pre 1980: handwriting + publisher
- Post 1985: scientists write LATEX
- Post 2010: a few scientists explore new digital formats

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\def\FrameCommand{\colorbox{shadecolor}}\FrameRule0.6pt
\MakeFramed {\FrameRestore}\vskip3mm}{\vskip0mm\endMakeFramed}
\providecommand{\shadedquoteBlue}{}
\renewenvironment{shadedquoteBlue}[1][]{
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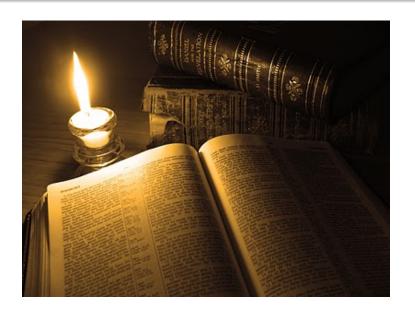
Big late 1990s question: Will MS Word replace LATEX? It never did!

LATEX PDF is mostly suboptimal for the new devices





The book will survive (LATEX is ideal)



The classical report/paper will survive (LATEX is ideal)

UNIVERSITÉ DE NICE - SOPHIA ANTIPOLIS

ÉCOLE DOCTORALE STIC SCIENCES ET TECHNOLOGIES DE L'INFORMATION ET DE LA COMMUNICATION

THÈSE

pour obtenir le titre de

Docteur en Sciences

de l'Université de Nice - Sophia Antipolis Mention : INFORMATIQUE

> Présentée et soutenue par Olivier COMMOWICK

Création et utilisation d'atlas anatomiques numériques pour la radiothérapie

Thèse dirigée par Grégoire Malandain préparée à l'Inria Sophia Antipolis, Projet Asclepios Journal paper template . April 2012 . Vol. XXI, No. 1

Long Titles Look More Impressive Than Short Ones

JONATHAN S. DOE* University of Technology, Delft frits@howtoTeX.com

Abstract

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I. SECTION TITLE EXAMPLE

Maecenas sed ultricies felis. Sed imperdiet dictum arcu a egestas.

• Donec dolor arcu, rutrum id molestie in,

- viverra sed diam.
- Curabitur feugiat,
- turpis sed auctor facilisis,
 arcu eros accumsan lorem, at posuere mi diam sit amet tortor.
- Fusce fermentum, mi sit amet euismod rutrum,
 sem lorem molestie diam, iaculis aliquet
- sapien tortor non nisi.

 Pellentesque bibendum pretium aliquet.

But there is an explosion of new platforms for digital learning systems!

MOOCs, Kahn Academy, ndla, H5P, Haiku Learning, Opigno, ...





My headache: How to write scientific material that can be easily published through old and new media?



LaTeX-for-paper and HTML-for-screen are two very different writing styles and technology platforms.

Scope: documents with *much* math and computer code

Key question:

What tools should I use for scientific writing?

PALEX









IP[y]: IPython
Interactive Computing

There is a jungle of outlets your scientific writings should address

- BW paper
- Color paper
- Slides
- Web w/design
- Wiki
- Blog
- Notebook
- ...



Can lassemble lots of different writings to a new future document (book)?

Suppose I write various types of scientific material,

- LATEX document,
- blog posts (HTML),
- web pages (HTML),
- Sphinx documents,
- IPython notebooks,
- wikis.
- Markdown files, ...

and later want to collect the pieces into a larger document, maybe some book - is that at all feasible?

Probably not, but I have a solution



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Pros and cons of various tools

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4 A tour of DocOnce

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- LATEX has lots of fancy layouts, but few translates to other formats
- LATEX inline math: works with all math-enabled formats (LATEX, MathJax, Sphinx, Markdown, MediaWiki, Confluence, ...)
- ATEX equation math:
 - LaTeX: equation*, equation, align*, align + eqnarray, split, alignat, ... (numerous!)
 - MathJax: equation*, equation, align*, align
 - MediaWiki: equation*, equation, align*, align
 - Sphinx: equation*, equation, align*
 - Markdown: equation*, equation, eqnarray*, align* (but no labels)

- Figures: all
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- Margin notes: LATEX, HTML with tailored css code
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Highly non-trivial to translate from/to $oxtimes_{ extstyle ext$

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- Index: LATEX, Sphinx
- Hyperlinks: all (but not on paper!)
- Interactive programs: Sphinx, IPython notebook, raw HTML
- Searching in multi-page doc.: Sphinx, MediaWiki, LATEX PDF

My colleagues face fundamental problem with going from LATEX to IPython notebook (=Markdown)

Plan

I am used to write LATEX paper/book-style with lots of cross-references and *floating* figures, code snippets, tables, algorithms, but now I want to convert to IPython notebooks.

Problem

Must have fixed figures, code snippets, tables. No algorithm environment, cross-referencing, equation referencing. All code needed for a snippet to run must be included. It's a different writing style, but lots of new opportunities.

- Sphinx refers to figures by the caption (has to be short!) and strips away any math notation (avoid that!).
- Sphinx refers to sections by the title, but removes math in the reference, so avoid math in headlines.
- Tables cannot be referred to by numbers and have to appear at fixed positions in the text.
- Computer code has to appear at fixed positions in the text.
- Algorithms must be written up using basic elements like lists or paragraphs with headings.
- Recipes are often typeset as enumerated lists. For recipes with code or math blocks: drop the list (gives problems in some formats) and use paragraph (or subsubsection) headings with "Step 1.", "Step 2.", etc.

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- Footnotes must appear as part of the running text (e.g., sentences surrounded by parenthesis), since only a few formats support footnotes.
- Sphinx does not handle code blocks where the first line is indented.
- Multiple plots in the same figure: mount the plots to one image file and include this (montage for png, gif, jpeg; pdftk, pdfnup, and pdfcrop for PDF).
- If you need several equations numbered in an align environment, recall that Sphinx, Markdown, and MediaWiki cannot handle this, although they have LATEX math support.
- Markdown tolerates labels in equations but cannot refer to them.

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- Index words can appear anywhere in LaTeX, but should be outside paragraphs in other tools.
- References to tables, program code and algorithms can only be made in LATEX.
- Figures are floating in LATEX, but fixed in other tools, so place figures exactly where they are needed the first time.
- Curve plots with color lines do not work well in black-and-white printing. Make sure plots makes sense in color and BW (e.g., by using colors and markers).

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Solution I: Use a format that translates to many

- Sphinx can do nice HTML, LATEX, epub, (almost) plain text, man pages, Gnome devhelp files, Qt help files, texinfo, JSON
- Markdown can do LATEX, HTML, MS Word, OpenOffice, XML, reStructuredText, epub, DocBook, ... but not Sphinx
- IPython notebook: can do LATEX, reStructuredText, HTML, PDF, Python script
- Sphinx and Markdown has some limited math support

Solution II: Use DocOnce

DocOnce offers minimalistic typing, great flexibility wrt format, especially for scientific writing with *much math and code*.

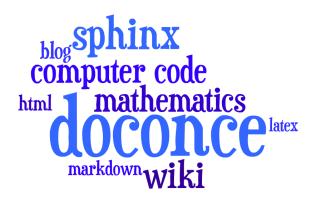
- Can generate LATEX, HTML, Sphinx, Markdown, MediaWiki, Google wiki, Creole wiki, reST, plain text
- Made for large science books and small notes
- Targets paper and screen
- Many special features (code snippets from files, embedded movies, admonitions, modern LATEX layouts, extended math support for Sphinx/Markdown, ...)
- Very effective for generating slides from ordinary text
- Applies Mako: DocOnce text is a program (!)
- Much like Markdown, less tagged than LATEX, HTML, Sphinx

Challenges with tools for scientific writing

Pros and cons of various tools

Occonce: Write once, include anywhere

4 A tour of DocOnce



DocOnce demos

http://hplgit.github.com/teamods/writing_reports/

- LaTeX-based PDF for screen, for printing, for phone
- Plain HTML or Bootstrap or Bootswatch or with a template or another template or solarized
- Sphinx: agni, pyramid, classy, fenics, redcloud
- HTML for Google or Wordpress for blog posts
- MediaWiki (Wikipedia, Wikibooks, etc)
- DocOnce source code and tutorial

DocOnce disclaimer

 Based on text transformations (reg.exp.) so valid syntax may occasionally give problems

DocOnce divorce

At any time one can divorce from DocOnce and marry one of the output formats, such as LATEX or Sphinx. The generated code is clean.

DocOnce experience

- Code generation is a great thing
- Preprocessors a la Mako is a great thing
- Less tagging than LaTeX/HTML is a great thing
- Code generation software becomes a repository of advanced and nice constructs for layout

Challenges with tools for scientific writing

2 Pros and cons of various tools

3 DocOnce: Write once, include anywhere

4 A tour of DocOnce

Title, authors, date, toc

TITLE: Some Title

AUTHOR: name1 at institution1, with more info & institution2

AUTHOR: name2 email:name2@web.com at institution

DATE: today

A table of contents is optional:

TOC: on

Notice

Title and authors must have all information on a single line!

Abstract

```
__Abstract.__
Here goes the abstract...

Or:
__Summary.__
Here goes the summary...
```

Section headings

```
Headings are surrounded by = signs:

====== This is an H1/chapter heading ======

==== This is an H2/section heading =====

==== This is an H3/subsection heading ====

=== This is an H4/paragraph heading ===

_This is a paragraph heading.__
```

Markup and lists

- * Bullet list items start with '*'
 and may span several lines
- * *Emphasized words* are possible
- * _Boldface words_ are also possible
- * color{red}{colored words} too
- * 'inline verbatim code' is featured
 - o and sublists with enumerated items starting with 'o' o items are just indented as you would do in email

This gets rendered as

- Bullet lists start with * and may span several lines
- Emphasized words are possible
- Boldface words are also possible
- colored words too
- inline verbatim code is featured
 - and sublists with enumerated items starting with o
 - items are just indented as you would do in email

Labels, references, index items

```
# Insert index items in the source
idx{key word1} idx{key word2}
# Label
==== Some section =====
label{this:section}
# Make reference
As we saw in Section ref{this:section}, references, index
items and labels follow a syntax similar to LaTeX
but without backslashes.
# Make reference to equations
See (ref{eq1})-(ref{myeq}).
# Make hyperlink
"some link text": "https://github.com/hplgit/doconce"
# Hyperlink with complete URL as link text
URL: "https://github.com/hplgit/doconce"
```

Figures and movies

Important:

Figures with HTML and LATEX size info, and caption: everything on one line

```
FIGURE: [figdir/myfig, width=300 frac=1.2] My caption. label{fig1}
```

Movies are also supported:

```
MOVIE: [http://youtu.be/IDeGDFZSYo8, width=420 height=315]
```

and rendered as

http://youtube.com/IDeGDFZSYo8

Math

Inline math as in LATEX:

...where $a=\int_{\infty} \int_{\infty} dx$ is an integral.

gets rendered as ...where $a=\int_{\Omega}fdx$ is an integral.

An equation environment is surrounded by !bt and !et tags, the rest is plain LATEX:

```
!bt
\begin{align}
\frac{\partial u}{\partial t} &= \nabla^2 u,
label{a:eq}\\
\nabla\cdot\pmb{v} & = 0
label{b:eq}
\end{align}
!et
```

which is rendered as

$$\frac{\partial u}{\partial t} = \nabla^2 u, \tag{1}$$
$$\nabla \cdot \mathbf{v} = 0 \tag{2}$$

Math flexibility

Limit math environments to

```
\[ ... \]
\begin{equation*}
\begin{equation}
\begin{equation}
\begin{align*}
\end{align*}
\begin{align}
\end{align}
```

DocOnce fix of shortcomings

- Sphinx, Markdown, and MediaWiki cannot have align with labels
- MathJax (HTML, Sphinx, Markdown, Mediawiki, ...) cannot handle equation references across web pages

Displaying code

return u. t

Code is enclosed in !bc and !ec tags:

```
!bc pycod
def solver(I, a, T, dt, theta):
    """Solve u'=-a*u, u(0)=I, for t in (0,T] with steps of dt."""
    dt = float(dt); N = int(round(T/dt)); T = N*dt
    u = zeros(N+1); t = linspace(0, T, N+1)
   u[0] = I
    for n in range(0, N):
        u[n+1] = (1 - (1-theta)*a*dt)/(1 + theta*dt*a)*u[n]
    return u. t
!ec
This gets rendered as
 def solver(I, a, T, dt, theta):
     """Solve u'=-a*u, u(0)=I, for t in (0,T] with steps of dt."""
     dt = float(dt); N = int(round(T/dt)); T = N*dt
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     u[0] = I
     for n in range (0, N):
         u[n+1] = (1 - (1-theta)*a*dt)/(1 + theta*dt*a)*u[n]
```

Copying code from source files

We recommend to copy as much code as possible directly from the source files:

```
@@@CODE path/to/file
@@@CODE path/to/file fromto: start-regex@end-regex
```

For example, copying a code snippet starting with def solver(and ending with (line not included) def next(x, y, is specified by start and end regular expressions:

```
{\tt @Q@CODE src/somefile.py fromto: def solver} ({\tt @def next} \xspace(x,\space,\space)) \\
```

Typesetting of code is implied by the file extension

- .py: pypro if complete file, pycod if snippet
- pyopt: visualized execution via the Online Python Tutor
- .f, .f90, f.95: fpro and fcod
- .cpp, .cxx: cpppro and cppcod
- .c: cpro and ccod
- .*sh: shpro and shcod
- .m: mpro and mcod
- ptex2tex: between 40+ code styles in LATEX
- pygments is used for code in HTML (ca 10 styles)

Demonstrating code execution; Online Python Tutor

With !bc pyoptpro or a file *.pyopt, the code applies the Online Python Tutor for displaying program flow and state of variables:

```
def solver(I, a, T, dt, theta):
     dt = float(dt)
     N = int(round(T/dt))
     T = N*dt
     u = [0.0] * (N+1)
     t = [i*dt for i in range(N+1)]
     u[0] = I
     for n in range (0, N):
         u[n+1] = (1 - (1-theta)*a*dt)/(1 + theta*dt*a)*u[n]
     return u. t
u, t = solver(I=1, a=1, T=3, dt=1., theta=0.5)
print u
(Visualize execution)
```

Demonstrating code execution; Sage Cell Server

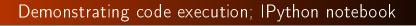
With !bc pyscpro or a file *.pysc, the code is typeset in a sage cell:

```
a = 2
b = 3
print 'a+b:', a + b

# In a sage cell we can also plot
from matplotlib.pyplot import *
from numpy import *
x = linspace(0, 4*pi, 101)
y = exp(-0.1*x)*cos(x)
plot(x, y)
xlabel('x'); ylabel('y')
show()
```

Warning

Works only in Sphinx documents (but HTML support is possible).



Can take a DocOnce source and transform to an IPython notebook with source

Tables

time		acceleration
0.0	1.4186 1.376512 1.1E+1	-5.01 11.919 14.717624

Gets rendered as

time	velocity	acceleration
0.0	1.4186	-5.01
2.0	1.376512	11.919
4.0	1.1E+1	14.717624

Newcommands for math

- newcommands*.tex files contain newcommands
- Used directly in LATEX
- Substitution made for many other formats

Labels, citations, index, bibliography

Lables, citations, index, and bibliography follow the ideas of LATEX, but without backslashes:

```
==== My Section =====
label{sec:mysec}
idx{key equation} idx{$\u$ conservation}
We refer to Section ref{sec:yoursec} for background material on
the *key equation*. Here we focus on the extension
!bt
\begin{equation}
Ddt\{u\} = \mycommand\{v\} \ label\{mysec:eq:Dudt\}
\end{equation}
!et
Equation (ref{mysec:eq:Dudt}) is important, see
cite{Larsen_et_al_2002, Johnson_Friedman_2010a}.
Also, cite{Miller_2000} supports such a view.
Figure ref{mysec:fig:myfig} displays the features.
FIGURE: [fig/myfile, width=600] My figure. label{mysec:fig:myfig}
==== References =====
BIBFILE: papers.pub
```

Exercises

DocOnce offers a special format for exercises, problems, projects, and examples:

```
===== Problem: Flip a Coin =====
label{demo:ex:1}
files=flip_coin.py, flip_coin.pdf
solutions=mysol.txt, mysol_flip_coin.py
keywords = random numbers; Monte Carlo simulation
!bsubex
Make a program that simulates flipping a coin $N$ times.
!bhint
Use 'r = random.random()' and define head as 'r \leq 0.5'.
!ehint
!esubex
!bsubex
Compute the probability of getting heads.
!bans
0.5
!eans
!esubex
```

Exercises

All exercises, problems, and projects in a document are parsed and available in a data structure (list of dicts) for further processing (e.g., making a book of problems).

Use of preprocessors

- Simple if-else tests a la the C/C++ preprocessor
- FORMAT variable can be used to test on format, e.g.,
 - if latex/pdflatex do one sort of code (raw LATEX)
 - if html, do another type of code (raw HTML)
- Easy to comment out large portions of text
- Easy to make different versions of the document
- The make preprocessor is really powerful gives a complete programming language inside the document!

DocOnce admonitions

Use with caution!

Such environments may light up the document, but can be disturbing too. Some admon styles have icons.

Going deeper.

More details can be separated from the rest.

Time for review!

Tasks:

- Maybe ask a question?
- Or two?

Conclusion:

 A special "block" admonition has less pronounced typesetting and can be used when no special icon is desired. Good for slides.

Generalized references

- Chapters can be stand-alone documents or parts of a book
- In a book you frequently refer to other chapters
- When a chapter is a stand-alone document, it must refer to another stand-alone chapter document
- This requires generalized cross-referencing
- ATEX has a solution: xr
- DocOnce has a solution also for HTML, Sphinx, Markdown, ...

```
ref[internal][latex cite][external]
```

```
...as shown in ref[Section ref{sec:eqs}][ in cite{math_eqs_2020}][ the document "Mathematical Equations":
"http://some.net/doc/matheqs.html" cite{math_eqs_2020}].
```

Slides

Very effective way to generate slides from running text:

- Take a copy of your DocOnce prose
- Strip off as much text as possible
- Emphasize key points in bullet items
- Focus on key equations, figures, movies, key code snippets
- Insert !split wherever you want a new slide to begin
- Insert !bpop and !epop around elements to pop up in sequence (or insert |\pause| inside code blocks)
- Use 7 = or 5 = in headings (H2 or H3)
- Supported slide types: Beamer, HTML, HTML5 (reveal.js, deck.js, csss, dzslides)

Example on slide code

```
!split
==== Headline =====
 * Key point 1
 * Key point 2
 * Key point 3: Although long
   bullet points are not recommended in general, we need
   it here for demonstration purposes to investigate
   what happens with the slide layout where there is
   so much text under one point
FIGURE: [fig/teacher1, width=100 frac=0.4]
Key equation:
!bt
\[ -\nabla^2 u = f \quad\hbox{in }\Omega \]
!et
And maybe a final comment?
!split
===== Next slide... =====
```

Grid layout of slide: MxN cells

Example with a bullet list to the left and a figure to the right (two cells: 00 and 01):

```
!split
==== Headline =====
!bslidecell 00
!bpop
 * Key point 1
 * Key point 2
 * Key point 3
!epop
!bpop
!bt
\[ -\nabla^2 u = f \quad\hbox{in }\Omega \]
!et
!epop
!eslidecell
!bslidecell 01
FIGURE: [fig/broken_pen_and_paper, width=400 frac=0.8]
!eslidecell
!split
===== Next slide... =====
```

Classic slide types

- LATEX Beamer
- Plain HTML w/various styles
 - separate slides w/navigation
 - one big slide

- Supported HTML5 packages:
 - reveal.js
 - deck.is
 - dzslides
 - CSSS
- Problem: each package has its own syntax (though similar)
 - Solution: slide code is autogenerated from DocOnce
- Problem: reveal and deck have numerous styles
 - Solution: easy to autogenerate all styles for a talk
- Problem: HTML5 slides need many style files
 - Solution: autocopy all files to talk directory
- Problem: original versions of the styles have too large fontssections, and other features not so suitable for lectures with much math and code
 - Solution: DocOnce contains adjusted css files

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- Problem: reveal and deck have numerous styles
 - Solution: easy to autogenerate all styles for a talk
- Problem: HTML5 slides need many style files
 - Solution: autocopy all files to talk directory
- Problem: original versions of the styles have too large fonts, centering, and other features not so suitable for lectures with much math and code
 - Solution: DocOnce contains adjusted css files

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DocOnce to HTML

Run in terminal window:

doconce format html doconcefile

```
# Solarized HTML style
doconce format html doconcefile --html_solarized

# Control pygments typesetting of code
doconce format html doconcefile --pygments_html_style=native

# Or use plain pre> tag for code
doconce format html doconcefile --no_pygments_html

# Further making of slides
doconce slides_html doconcefile reveal --html_slide_theme=darkgray
```

Output for blog posts

Two formats of blog posts are supported:

- Google's blogspot.com: just paste the raw HTML (full support of math and code)
- Wordpress: despite limited math, DocOnce manipulates the math such that even equation and align work in Wordpress :-)

For wordpress, add -wordpress:

doconce format html doconcefile --wordpress

and paste the code into the text area.

DocOnce to pdf LATEX

```
doconce format pdflatex doconcefile --latex_code_style=lst
pdflatex doconcefile
bibtex doconcefile
pdflatex doconcefile
```

DocOnce to Sphinx

```
doconce format sphinx doconcefile

# Autocreate sphinx directory
doconce sphinx_dir theme=pyramid doconcefile

# Copy files and build HTML document
python automake-sphinx.py
google-chrome sphinx-rootdir/_build/html/index.html
```

Much easier than running the Sphinx tools manually!

Output for wiki

Only MediaWiki supports math.

doconce format mwiki doconcefile

Recommended site:

ShoutWiki for standard wikis

Publishing of "official" documents:

- Wikibooks (can test code in the sandbox)
- Wikipedia

DocOnce to other formats

```
doconce format pandoc doconcefile # (Pandoc extended) Markdown doconce format gwiki doconcefile # Googlecode wiki doconce format cwiki doconcefile # Creole wiki (Bitbucket) doconce format rst doconcefile # reStructuredText doconce format plain doconcefile # plain, untagged text for email
```

Installation

- Source at GitHub (recommended!)
 - git clone + sudo python setyp.py install
- Many dependencies...
 - Must have preprocess and mako
 - Need latex, sphinx, pandoc, etc. (see the Installation description)
 - Easy for slides: only preprocess and make are needed:-)

Writing tips for LATEX writers who want to convert to DocOnce and generate other formats

- doconce latex2doconce helps the translation
- Use \[\], equation, equation*, align, align* and nothing more for equations
- Figures: avoid subfigures (combine image files instead), use \includegraphics, have captions after graphics, use short figure captions, position exactly where needed
- Tables: have them inline (not floating), with no caption
- Computer codes: have them inline (not floating)
- Rewrite all pageref commands
- Do not use algorithm environments, use simple list formatting instead
- Avoid math in section headings
- Use pdflatex or xetex
- Use BibTEX (can easily be converted to publish used by DocOnce)
- Use \href for links (and insert links frequently)
- Use the bm package for boldface u

DocOnce writing tips

Figures and movies:

- Prepare figures in the right format: EPS for latex, PDF for pdflatex, PNG, GIF or JPEG for HTML formats (html, and HTML output from sphinx, rst, pandoc). One can omit the figure file extension and doconce will pick the most appropriate file for the given output format.
- Let plotting programs produce both PDF/EPS and PNG files. (Recall that PDF and EPS are vector graphics formats that can scale to any size with much higher quality than PNG or other bitmap formats.)
- Use doconce combine_images to combine several images into one.
- Store all figures in a directory (tree) with name fig or fig-X, where X is some short logical name for the current document.
- Store all movies in a directory (tree) with name mov or mov-X.
- Favor the movie formats MP4, WebM, and Ogg (best suited for modern browsers).

DocOnce writing tips

- \bm{u} gives nicer boldface typesetting of math symbols than the alternatives \boldsymbol{u} and \pmb{u}.
- For HTML-based formats using MathJax, \bm{u} is not supported and therefore automatically replaced by \boldsymbol{u} by DocOnce.
- Use \\textcolor{blue}{formula} in math expressions to color a part.
- Not all LATEX math is supported by MathJax. Some legal LATEX math might give MathJax problems then one has to rewrite the expression to find a syntax that works both with LATEX and MathJax.
- Use doconce spellcheck *.do.txt to automatically spellcheck files.
- Avoid page references and footnotes.

Writing tips for sphinx and other formats

For output formats different from latex, pdflatex, and html:

- Use labels only right after section headings and in equations.
- Be careful with labels in align math environments: pandoc and mwiki cannot refer to them.
- sphinx output requires
 - no math in section headings or figure captions (gets removed in references).
 - running text to start in column 1.
 - progressive section headings: after chapter (9 =) comes section (7 =), then subsection (5 =), then paragraph (3 =). Do not make jumps in this progression.
 - index entries (\index{keyword}) before the paragraph where they are introduced and place them before subsubsection headings (=== ... ===) and after subsection and section headings.
 - a line of text and no comment or math before code or list.