omdoc.sty/cls: Semantic Markup for Open Mathematical Documents in LATEX

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Abstract

The omdoc package is part of the STEX collection, a version of TEX/LATEX that allows to markup TEX/LATEX documents semantically without leaving the document format, essentially turning TEX/LATEX into a document format for mathematical knowledge management (MKM).

This package supplies an infrastructure for writing OMDoc documents in LaTeX. This includes a simple structure sharing mechanism for STeX that allows to to move from a copy-and-paste document development model to a copy-and-reference model, which conserves space and simplifies document management. The augmented structure can be used by MKM systems for added-value services, either directly from the STeX sources, or after translation.

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1 Introduction

STEX is a version of TeX/IATeX that allows to markup TeX/IATeX documents semantically without leaving the document format, essentially turning TeX/IATeX into a document format for mathematical knowledge management (MKM). The package supports direct translation to the OMDoc format [Koh06]

The omdoc package supplies macros and environment that allow to label document fragments and to reference them later in the same document or in other documents. In essence, this enhances the document-as-trees model to documents-as-directed-acyclic-graphs (DAG) model. This structure can be used by MKM systems for added-value services, either directly from the STEX sources, or after translation. Currently, trans-document referencing provided by this package can only be used in the STEX collection.

DAG models of documents allow to replace the "Copy and Paste" in the source document with a label-and-reference model where document are shared in the document source and the formatter does the copying during document formatting/presentation.¹

2 The User Interface

The omdoc package generates two files: omdoc.cls, and omdoc.sty. The OMDoc class is a minimally changed variant of the standard article class that includes the functionality provided by omdoc.sty. The rest of the documentation pertains to the functionality introduced by omdoc.sty.

2.1 Package and Class Options

The omdoc class accept the following options:

class= $\langle name \rangle$	$load \langle name \rangle.cls instead of article.cls$
$\texttt{topsect=} \langle \textit{number} \rangle$	The top-level sectioning level; the default is section
showignores	show the the contents of the ignore environment after all
showmeta	show the metadata; see metakeys.sty
showmods	show modules; see modules.sty
extrefs	allow external references; see sref.sty
defindex	index definienda; see statements.sty
mh	MathHub support; see [Kohlhase:mss:ctan]

The omdoc package accepts the same except the first two.

2.2 Document Structure

document \documentkeys

EdN:1

The top-level document environment can be given key/value information by the \documentkeys macro in the preamble¹. This can be used to give metadata about

 $^{^{1}\}mathrm{EdNote}\colon$ integrate with latexml's XMRef in the Math mode.

ıa

the document. For the moment only the id key is used to give an identifier to the omdoc element resulting from the LATEXML transformation.

omgroup

id creators contributors short loadmodules The structure of the document is given by the omgroup environment just like in OMDoc. In the LATEX route, the omgroup environment is flexibly mapped to sectioning commands, inducing the proper sectioning level from the nesting of omgroup environments. Correspondingly, the omgroup environment takes an optional key/value argument for metadata followed by a regular argument for the (section) title of the omgroup. The optional metadata argument has the keys id for an identifier, creators and contributors for the Dublin Core metadata [DCM03]; see [Koh16a] for details of the format. The short allows to give a short title for the generated section. If the title contains semantic macros, they need to be protected by \protect, and we need to give the loadmodules key it needs no value. For instance we would have

```
\begin{module}{foo}
\symdef{bar}{B^a_r}
...
\begin{omgroup}[id=barderiv,loadmodules]
{Introducing $\protect\bar$ Derivations}
```

blindomgroup

STEX automatically computes the sectioning level, from the nesting of omgroup environments. But sometimes, we want to skip levels (e.g. to use a subsection* as an introduction for a chapter). Therefore the omdoc package provides a variant blindomgroup that does not produce markup, but increments the sectioning level and logically groups document parts that belong together, but where traditional document markup relies on convention rather than explicit markup. The blindomgroup environment is useful e.g. for creating frontmatter at the correct level. Example 1 shows a typical setup for the outer document structure of a book with parts and chapters. We use two levels of blindomgroup:

- The outer one groups the introductory parts of the book (which we assume to have a sectioning hierarchy topping at the part level). This blindomgroup makes sure that the introductory remarks become a "chapter" instead of a "part"
- Th inner one groups the frontmatter² and makes the preface of the book a section-level construct. Note that here the display=flow on the omgroup environment prevents numbering as is traditional for prefaces.

\currentsectionlevel \CurrentSectionLevel The \currentsectionlevel macro supplies the name of the current sectioning level, e.g. "chapter", or "subsection". \CurrentSectionLevel is the capitalized variant. They are useful to write something like "In this \currentsectionlevel, we will..." in an omgroup environment, where we do not know which sectioning level we will end up.

¹We cannot patch the document environment to accept an optional argument, since other packages we load already do; pity.

²We shied away from redefining the **frontmatter** to induce a blindomgroup, but this may be the "right" way to go in the future.

```
\begin{document}
\begin{blindomgroup}
\begin{blindomgroup}
\begin{frontmatter}
\maketitle\newpage
\begin{omgroup}[display=flow]{Preface}
... <<pre><<pre>c<<pre>
\end{omgroup}
\clearpage\setcounter{tocdepth}{4}\tableofcontents\clearpage
\end{frontmatter}
\end{blindomgroup}
... <<introductory remarks>> ...
\end{blindomgroup}
\begin{omgroup}{Introduction}
... <<intro>> ...
\end{omgroup}
... <<more chapters>> ...
\bibliographystyle{alpha}\bibliography{kwarc}
\end{document}
```

Example 1: A typical Document Structure of a Book

2.3 Ignoring Inputs

ignore

showignores

The ignore environment can be used for hiding text parts from the document structure. The body of the environment is not PDF or DVI output unless the showignores option is given to the omdoc class or package. But in the generated OMDoc result, the body is marked up with a ignore element. This is useful in two situations. For

editing One may want to hide unfinished or obsolete parts of a document

narrative/content markup In STEX we mark up narrative-structured documents. In the generated OMDoc documents we want to be able to cache content objects that are not directly visible. For instance in the statements package [Koh16c] we use the \inlinedef macro to mark up phrase-level definitions, which verbalize more formal definitions. The latter can be hidden by an ignore and referenced by the verbalizes key in \inlinedef.

2.4 Structure Sharing

\STRlabel \STRcopy

The \STRlabel macro takes two arguments: a label and the content and stores the the content for later use by \STRcopy[$\langle URL \rangle$] { $\langle label \rangle$ }, which expands to the previously stored content. If the \STRlabel macro was in a different file, then we can give a URL $\langle URL \rangle$ that lets LaTeXML generate the correct reference.

\STRsemantics

The \STRlabel macro has a variant \STRsemantics, where the label argument is optional, and which takes a third argument, which is ignored in LATEX. This allows to specify the meaning of the content (whatever that may mean) in cases,

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where the source document is not formatted for presentation, but is transformed into some content markup format.²

2.5 Global Variables

Text fragments and modules can be made more re-usable by the use of global variables. For instance, the admin section of a course can be made course-independent (and therefore re-usable) by using variables (actually token registers) courseAcronym and courseTitle instead of the text itself. The variables can then be set in the STEX preamble of the course notes file. $\setSGvar\{\langle vname\rangle\}\{\langle text\rangle\}$ to set the global variable $\langle vname\rangle$ to $\langle text\rangle$ and $\setSGvar\{\langle vname\rangle\}$ to reference it

\setSGvar \useSGvar

\ifSGvar

With \ifSGvar we can test for the contents of a global variable: the macro call \ifSGvar{ $\langle vname \rangle$ }{ $\langle val \rangle$ }{ $\langle ctext \rangle$ } tests the content of the global variable $\langle vname \rangle$, only if (after expansion) it is equal to $\langle val \rangle$, the conditional text $\langle ctext \rangle$ is formatted.

2.6 Colors

\blue \red

\black

For convenience, the omdoc package defines a couple of color macros for the color package: For instance \blue abbreviates \textcolor{blue}, so that \blue{something} writes something in blue. The macros \red \green, \cyan, \magenta, \brown, \yellow, \orange, \gray, and finally \black are analogous.

3 Limitations

In this section we document known limitations. If you want to help alleviate them, please feel free to contact the package author. Some of them are currently discussed in the ST_EX GitHub repository [sTeX].

when option book which uses \pagestyle{headings} is given and semantic
macros are given in the omgroup titles, then they sometimes are not defined
by the time the heading is formatted. Need to look into how the headings
are made.

 $^{^2\}mathrm{EdNote}$: document LMID und LMXREf here if we decide to keep them.

4 Implementation: The OMDoc Class

The functionality is spread over the omdoc class and package. The class provides the document environment and the omdoc element corresponds to it, whereas the package provides the concrete functionality.

4.1 Class Options

\omdoc@cls@class

To initialize the omdoc class, we declare and process the necessary options using the kvoptions package for key/value options handling. For omdoc.cls this is quite simple. We have options report and book, which set the \omdoc@cls@class macro and pass on the macro to omdoc.sty for further processing.

```
1 (*cls)
  2 \RequirePackage{kvoptions}
  3 \SetupKeyvalOptions{family=omdoc@cls,prefix=omdoc@cls@}
  4 \DeclareStringOption[article]{class}
  5 \RequirePackage{etoolbox}
        the following options are deprecated.
  6 \DeclareVoidOption{report}{\def\omdoc@cls@class{report}%
  7 \ClassWarning{omdoc}{the option 'report' is deprecated, use 'class=report', instead}}
  8 \DeclareVoidOption{book}{\def\omdoc@cls@class{book}%
  9 \ClassWarning{omdoc}{the option 'bookpart' is deprecated, use 'class=book', instead}}
10 \DeclareVoidOption{bookpart}{\def\omdoc@cls@class{book}%
11 \PassOptionToPackage{topsect=chapter}{omdoc}%
12 \verb|\| ClassWarning{omdoc}{the option 'bookpart' is deprecated, use 'class=book, topsect=chapter', instance of the continuous content of the content of t
the rest of the options are only passed on to omdoc.sty and the class selected by
the first options.
13 \def\@omdoc@cls@docopt{}
14 \DeclareDefaultOption{%
15 \ifx\@omdoc@cls@docopt\@empty%
16 \xdef\@omdoc@cls@docopt{\CurrentOption}%
17 \else\xappto\@omdoc@cls@docopt{,\CurrentOption}%
19 \PassOptionsToPackage{\CurrentOption}{omdoc}
20 \PassOptionsToPackage{\CurrentOption}{stex}
21 \ProcessKeyvalOptions{omdoc@cls}
        We load article.cls, and the desired packages. For the LATEXML bindings,
we make sure the right packages are loaded.
22 \LoadClass[\@omdoc@cls@docopt]{\omdoc@cls@class}
23 \RequirePackage{omdoc}
24 \RequirePackage{stex}
```

4.2 Beefing up the document environment

Now, we will define the environments we need. The top-level one is the document environment, which we redefined so that we can provide keyval arguments.

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For the moment we do not use them on the LATEX level, but the document identifier is picked up by LATEXML.³

```
25 \srefaddidkey{document}
```

- 26 \newcommand\documentkeys[1]{\metasetkeys{document}{#1}}
- 27 \let\orig@document=\document
- 28 \srefaddidkey{document}
- 29 \renewcommand{\document}[1][]{\metasetkeys{document}{#1}\orig@document}
- 30 (/cls)

5 Implementation: OMDoc Package

5.1 Package Options

We declare some switches which will modify the behavior according to the package options. Generally, an option xxx will just set the appropriate switches to true (otherwise they stay false).

```
31 (*package)
```

- 32 \RequirePackage{kvoptions}
- 33 \SetupKeyvalOptions{family=omdoc@sty,prefix=omdoc@sty@}
- 34 \DeclareBoolOption{mh}
- 35 \DeclareBoolOption{showignores}
- 36 \DeclareStringOption[section] {topsect}
- 37 \newcount\section@level
- 38 \DeclareDefaultOption{\PassOptionsToPackage{\CurrentOption}{sref}}
- 39 \ProcessKeyvalOptions{omdoc@sty}

Then we need to set up the packages by requiring the **sref** package to be loaded.

```
40 \ifomdoc@sty@mh\RequirePackage{omdoc-mh}\fi
```

- 41 \RequirePackage{etoolbox}
- 42 \RequirePackage{sref}
- 43 \RequirePackage{xspace}
- 44 \RequirePackage{comment}
- 45 \RequirePackage{pathsuris}

\section@level

Finally, we set the \section@level macro that governs sectioning.

- 46 \section@level=2
- $47 \ \texttt{\{nondoc@sty@topsect\}{part}{\section@level=0}{}} \\$
- $48 \ \texttt{\chapter}{\texttt{\chapter}}$
- 49 \ifdefstring{\omdoc@cls@class}{book}{\section@level=0}{}
- 50 \ifdefstring{\omdoc@cls@class}{report}{\section@level=0}{}

5.2 Document Structure

The structure of the document is given by the omgroup environment just like in OMDoc. The hierarchy is adjusted automatically according to the LATEX class in effect.

 $^{^3\}mathrm{EdNote}\colon$ faking documentkeys for now. QHANG, please implement

EdN:4

\currentsectionlevel For the \currentsectionlevel and \Currentsectionlevel macros we use an internal macro \current@section@level that only contains the keyword (no markup). We initialize it with "document" as a default. In the generated OMDoc, we only generate a text element of class omdoc_currentsectionlevel, wich will be instantiated by CSS later.⁴

- 51 \def\current@section@level{document}%
- 52 \newcommand\currentsectionlevel{\lowercase\expandafter{\current@section@level}\xspace}%
- 53 \newcommand\Currentsectionlevel{\expandafter\MakeUppercase\current@section@level\xspace}%

blindomgroup

- 54 \newcommand\at@begin@blindomgroup[1]{}
- 55 \newenvironment{blindomgroup}
- 56 {\advance\section@level by 1\at@begin@blindomgroup\setion@level}
- 57 {\advance\section@level by -1}

\omgroup@nonum

convenience macro: $\mbox{\convenience macro: } \mbox{\convenience macro: } \mbox{\co$ tioning with title $\langle title \rangle$ at level $\langle level \rangle$.

- 58 \newcommand\omgroup@nonum[2]{%
- 59 \ifx\hyper@anchor\@undefined\else\phantomsection\fi%
- 60 \addcontentsline{toc}{#1}{#2}\@nameuse{#1}*{#2}}

\omgroup@num

convenience macro: ω on ω on ω on ω was numbered sectioning with title $\langle title \rangle$ at level $\langle level \rangle$. We have to check the short key was given in the omgroup environment and – if it is use it. But how to do that depends on whether the rdfmeta package has been loaded. In the end we call \sref@label@id to enable crossreferencing.

- 61 \newcommand\omgroup@num[2]{%
- 62 \edef\@@ID{\sref@id}
- 63 \ifx\omgroup@short\@empty% no short title
- 64 \@nameuse{#1}{#2}%
- 65 \else% we have a short title
- 66 \@ifundefined{rdfmeta@sectioning}%
- {\@nameuse{#1}[\omgroup@short]{#2}}%
- 68 {\@nameuse{rdfmeta@#1@old}[\omgroup@short]{#2}}%
- 70 \sref@label@id@arg{\omdoc@sect@name~\@nameuse{the#1}}\@@ID}

omgroup

- 71 \def\@true{true}
- 72 \def\@false{false}
- 73 \srefaddidkey{omgroup}
- 74 \addmetakey{omgroup}{date}
- 75 \addmetakey{omgroup}{creators}
- 76 \addmetakey{omgroup}{contributors}
- 77 \addmetakey{omgroup}{srccite}
- 78 \addmetakey{omgroup}{type}

 $^{^4\}mathrm{EdNote}$: MK: we may have to experiment with the more powerful uppercasing macro from mfirstuc.sty once we internationalize.

```
we define a switch for numbering lines and a hook for the beginning of groups:
                  The \at@begin@omgroup macro allows customization. It is run at the beginning
\at@begin@omgroup
                  of the omgroup, i.e. after the section heading.
                  82 \newif\if@@num\@@numtrue
                  83 \newif\if@frontmatter\@frontmatterfalse
                  84 \newif\if@backmatter\@backmatterfalse
                  85 \newcommand\at@begin@omgroup[3][]{}
                     Then we define a helper macro that takes care of the sectioning magic. It
                  comes with its own key/value interface for customization.
                  86 \addmetakey{omdoc@sect}{name}
                  87 \addmetakey[false] {omdoc@sect} {clear} [true]
                  88 \addmetakey{omdoc@sect}{ref}
                  89 \addmetakey[false] {omdoc@sect} {num} [true]
                  90 \newcommand\omdoc@sectioning[3][]{\metasetkeys{omdoc@sect}{#1}%
                  91 \ifx\omdoc@sect@clear\@true\cleardoublepage\fi%
                  92 \if@@num% numbering not overridden by frontmatter, etc.
                  93 \ifx\omdoc@sect@num\@true\omgroup@num{#2}{#3}\else\omgroup@nonum{#2}{#3}\fi%
                  94 \def\current@section@level{\omdoc@sect@name}%
                  95 \else\omgroup@nonum{#2}{#3}%
                  96 \fi}% if@@num
                  and another one, if redefines the \addtocontentsline macro of LATEX to import
                  the respective macros. It takes as an argument a list of module names.<sup>5</sup>
                  97 \newcommand\omgroup@redefine@addtocontents[1]{%
                  98 \edef\@@import{#1}%
                  99 \@for\@I:=\@@import\do{%
                 100 \edef\@path{\csname module@\@I @path\endcsname}%
                 101 \@ifundefined{tf@toc}\relax%
                         {\protected@write\tf@toc{}{\string\@requiremodules{\@path}{sms}}}}
                 102
                 103 \ifx\hyper@anchor\@undefined% hyperref.sty loaded?
                 104 \def\addcontentsline##1##2##3{%
                 106 \else% hyperref.sty not loaded
                 107 \def\addcontentsline##1##2##3{%
                 109 \fi}% hypreref.sty loaded?
                  now the omgroup environment itself. This takes care of the table of contents via
                  the helper macro above and then selects the appropriate sectioning command from
```

79 \addmetakey*{omgroup}{short}
80 \addmetakey*{omgroup}{display}

article.cls.

110 \newenvironment{omgroup}[2][]% keys, title
111 {\metasetkeys{omgroup}{#1}\sref@target%
112 \ifx\omgroup@display\st@flow\@@numfalse\fi

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81 \addmetakey[false]{omgroup}{loadmodules}[true]

 $^{^5\}mathrm{Ed}\mathrm{Note}\colon$ MK: the extension sms is hard-coded here, but should not be. This will not work in multilingual settings.

```
113 \if@frontmatter\@@numfalse\fi
```

If the loadmodules key is set on \begin{omgroup}, we redefine the \addcontetsline macro that determines how the sectioning commands below construct the entries for the table of contents.

```
114 \ifx\omgroup@loadmodules\@true%
```

- 115 \omgroup@redefine@addtocontents{\@ifundefined{mod@id}\used@modules%
- 116 {\@ifundefined{module@\mod@id @path}{\used@modules}\mod@id}}\fi%

now we only need to construct the right sectioning depending on the value of \section@level.

```
117 \advance\section@level by 1\relax%
```

- 118 \ifcase\section@level%
- 119 \or\omdoc@sectioning[name=Part,clear,num]{part}{#2}%
- 120 \or\omdoc@sectioning[name=Chapter,clear,num]{chapter}{#2}%
- 121 \or\omdoc@sectioning[name=Section,num]{section}{#2}%
- 122 \or\omdoc@sectioning[name=Subsection,num]{subsection}{#2}%
- 123 \or\omdoc@sectioning[name=Subsubsection,num]{subsubsection}{#2}%
- 124 \or\omdoc@sectioning[name=Paragraph,ref=this paragraph]{paragraph}{#2}%
- 125 \or\omdoc@sectioning[name=Subparagraph,ref=this subparagraph]{paragraph}{#2}%
- 126 \fi% \ifcase
- 127 \at@begin@omgroup[#1]\section@level{#2}}% for customization
- 128 {\advance\section@level by -1}

5.3 Front and Backmatter

Index markup is provided by the omtext package [Koh16b], so in the omdoc package we only need to supply the corresponding \printindex command, if it is not already defined

\printindex

```
129 \providecommand\printindex{\IfFileExists{\jobname.ind}{\input{\jobname.ind}}{}}
130~\langle/\mathsf{package}\rangle
```

frontmatter some classes (e.g. book.cls) already have \frontmatter and \mainmatter macros. We use those (possibly defining them).

- 131 (*cls)
- 132 \ifcsdef{frontmatter}% to redefine if necessary
- 133 {\cslet{orig@frontmatter}{\frontmatter}\cslet{frontmatter}{\relax}}
- 134 {\cslet{orig@frontmatter}{\clearpage\@mainmatterfalse\pagenumbering{roman}}}
- 135 \newenvironment{frontmatter}
- 136 {\@frontmattertrue\orig@mainmatter}
- 137 {\@frontmatterfalse%
- 138 \ifcsdef{mainmatter}{\mainmatter}%
- 139 {\clearpage\@mainmattertrue\pagenumbering{arabic}}}

backmatter some classes (e.g. book.cls) already have a \backmatter macro. We use that (possibly defining it).

 $140\ \ensuremath{\mbox{\sc if necessary}}\$ to redefine if necessary

```
141 {\cslet{orig@backmatter}{\backmatter}\cslet{backmatter}{\relax}}
142 {\cslet{orig@backmatter}{\clearpage\@mainmatterfalse\pagenumbering{roman}}}
143 \newenvironment{backmatter}{\orig@backmatter\@backmattertrue}{\@backmatterfalse}
144 (/cls)
```

5.4 Ignoring Inputs

```
ignore
```

```
145 (*package)
147 \addmetakey{ignore}{type}
148 \addmetakey{ignore}{comment}
149 \newenvironment{ignore}[1][]
150 {\metasetkeys{ignore}{#1}\textless\ignore@type\textgreater\bgroup\itshape}
151 {\egroup\textless/\ignore@type\textgreater}
152 \renewenvironment{ignore}{}{}\else\excludecomment{ignore}\fi
```

Structure Sharing 5.5

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```
153 \providecommand{\lxDocumentID}[1]{}%
```

154 \def\LXMID#1#2{\expandafter\gdef\csname xmarg#1\endcsname{#2}\csname xmarg#1\endcsname}

155 \def\LXMRef#1{\csname xmarg#1\endcsname}

6

\STRlabel The main macro, it it used to attach a label to some text expansion. Later on, using the \STRcopy macro, the author can use this label to get the expansion originally assigned.

 $156 \end{area} $156 \end{are$

\STRcopy

The \STRcopy macro is used to call the expansion of a given label. In case the label is not defined it will issue a warning.⁷

157 \newcommand\STRcopy[2][]{\expandafter\ifx\csname STR0#2\endcsname\relax

158 \message{STR warning: reference #2 undefined!}

159 \else\csname STR@#2\endcsname\fi}

\STRsemantics if we have a presentation form and a semantic form, then we can use

160 \newcommand\STRsemantics[3][]{#2\def\@test{#1}\ifx\@test\@empty\STRlabeldef{#1}{#2}\fi}

\STRlabeldef This is the macro that does the actual labeling. Is it called inside \STRlabel

161 \def\STRlabeldef#1{\expandafter\gdef\csname STR0#1\endcsname}

 $^{^6\}mathrm{EdNote}$: The following is simply copied over from the latexml package, which we eliminated, we should integrate better.

 $^{^7\}mathrm{EdNote}\colon\, \mathrm{MK}\colon we \ \mathsf{need}$ to do something about the ref!

5.6 Global Variables

168 \def\red#1{\textcolor{red}{#1}}
169 \def\green#1{\textcolor{green}{#1}}
170 \def\cyan#1{\textcolor{cyan}{#1}}
171 \def\magenta#1{\textcolor{magenta}{#1}}
172 \def\brown#1{\textcolor{brown}{#1}}
173 \def\yellow#1{\textcolor{yellow}{#1}}
174 \def\orange#1{\textcolor{orange}{#1}}

Change History

v0.1	v1.0
General: First Version 1	General: separated out omtext.dtx 1
v0.2	v1.1
General: added OMDoc class 1	General: integrated etoolbox
v0.3	package 1
General: moved omtext and friends	v1.2
here from the statements package 1	General: front/backmatter 1
v0.4	v1.3
General: added quotes 1	General: changed to keyval
v0.5	class/package options, allowed
General: more package/class	arbitrary classes 1
options 1	global variables and switches 1
v0.7	removing keyval arg from
General: giving keyval arguments	document in favor of
to the document environment . 1	\documentkeys macro 1

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- [sTeX] KWARC/sTeX. URL: https://github.com/KWARC/sTeX (visited on 05/15/2015).