version 2022/1.1

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This is a modern plain format for the LuaTeX engine, adding improved low-level support for many LuaTeX extensions and newer PDF features. While it can be used as drop-in replacement for plain TeX, it probably is most useful as a basis for your own formats.

Most features included in the format are provided by separate packages that can be used on their own; see the packages

minim-mp for mplib (MetaPost) support minim-math for Unicode mathematics minim-pdf for hypertext and Tagged PDF minim-xmp for XMP (metadata) inclusion

The documentation for the above packages will be replicated in separate chapters below.

You can use this package by simply saying \input minim; this will load the file minim.tex. For building your own format files, you can re-use the file minim.ini: if you define \fmtname before inputting this file, no \dump will be performed.

Contents

minim

	Compatibility		
N	Metapost	•	3
	Metapost instances		3
	Running tex from within metapost		
	Partial paths and the even-odd rule		5
	Running lua from within metapost		5
	Tiling patterns		6
	Other metapost extensions		6
	Lua interface		7
	Debugging		7
	Extending metapost		
N	Mathematics		8
	Styles and alphabets		8
	Character variants		
	Setting up fonts		9
	Shorthands and additions	. 1	10
	Best practices	. 1	11
H	Iypertext	1	2
	Hyperlinks	. 1	12
	Bookmarks	. 1	12
	Page labels	. 1	12
	PDF/A		
	Embedded files		

\mathbf{I}	agged PDF	14
	Purpose, limitations and pitfalls	14
	General overview	15
	Marked content items	15
	Artifacts	15
	Document structure	16
	Structure element aliases	16
	Manipulating the logical order	16
	Structure element options	. 17
	Languages	17
	Helper macros	18
N	I etadata	19
	Setting metadata	19
	Getting metadata	. 19
	Supported metadata keys	20
	Adding new keys and schemas	20
	Generated XMP	22
P	rogramming macros	23
	Format files	23
	Register allocation	23
	Callbacks	24
	Programming helpers	25
	Miscellaneous functions	25
	Miscellaneous helper macros	26

Compatibility

One central design goal of minim is to be as unobtrusive as possible: you should be able to safely ignore any function you do not want to use. Please get in touch if you find this not the case.

Particular care has been taken to be compatible with <a href="https://literalcommons.org/ltms.com/ltms

Licence

This package may be distributed under the terms of the European Union Public Licence (EUPL) version 1.2 or later. An english version of this licence has been included as an attachment to this file; copies in other languages can be obtained at

https://joinup.ec.europa.eu/collection/eupl/eupl-text-eupl-12

Metapost

This package offers low-level mplib integration for plain luatex. The use of multiple simultaneous metapost instances is supported, as well as running tex or lua code from within metapost. In order to use it, simply say \input minim-mp.tex.

After this, \directmetapost [options] { mp code } will result in a series of images corresponding to the beginfig ... endfig statements in your mp code. Every image will be in a box of its own.

Every call to \directmetapost opens and closes a separate metapost instance. If you want your second call to remember the first, you will have to define a persistent metapost instance. This will also give you more control over image extraction. See below under "Metapost instances". The options will also be explained there (for simple cases, you will not need them).

The logging of the metapost run will be included in the regular log file. If an error occurs, the logging will also be shown on the terminal.

This package can also be used as a stand-alone metapost compiler. Saying

```
luatex --fmt=minim-mp your_file.mp
```

will create a pdf file of all images in your_file.mp, in order, with page sizes adjusted to image dimensions. You might need generate the format first, this is done with

```
luatex --ini minim-mp.ini
```

Use minim-lamp instead of minim-mp for an experimental latex-based version of the minim-mp format.

Metapost instances

For more complicated uses, you can define your own instances by saying \newmetapostinstance [options] \id. An instance can be closed with \closemetapostinstance \id. These are the options you can use:

```
Option
           Default
                           Description
           ':metapost:'
                           Used in error messages.
jobname
           'plain.mp'
                           Format to initialise the instance with.
format
           'scaled'
                           One of scaled, decimal or double.
math
                           Random seed for this instance.
seed
           nil
                           Catcode table for btex ... etex.
catcodes
           copy of _G
                           Lua environment; see below.
```

Now that you have your own instance, you can run chunks of metapost code in it with \runmetapost \id { code }. Any images that your code may have contained will have to be extracted explicitly. This is possible in a number of ways, although each image can be retrieved only once.

\getnextmpimage \id - Writes the first unretrieved image to the current node list. There, the image will be contained in a single box node.

\getnamedmpimage \id {name} - Retrieves an image by name regardless of its position, and writes it to the current node list.

\boxnextmpimage \id box-nr - Puts the next unretrieved image in box box-nr. The number may be anything tex can parse as a number.

\boxnamedmpimage \id box-nr {name} - Puts the image named name in box box-nr.

Say \remainingmpimages \id for the number of images not yet retrieved. Finally, as a shorthand, \runmetapostimage \id { code } will add beginfig ... endfig to your code and write the resulting image immediately to the current list.

Running tex from within metapost

You can include tex snippets with either maketext "tex text" or btex ... etex statements. The tex code will be executed in the current environment without an extra grouping level. The result of either statement at the place where it is invoked is an image object of the proper dimensions that can be moved, scaled, rotated and mirrored. You can even specify a colour. Its contents, however, will only be added afterwards and are invisible to metapost.

Arbitrary tex statements may be included in **verbatimtex** ... **etex**, which may occur anywhere. These **btex** and **verbatimtex** statements are executed in the order they are given.

Previously-defined box resources can be included with boxresource(nr). The result will be an image object with the proper dimensions. This image can be transformed in any way you like, but you cannot inspect the contents of the resource within metapost.

You can also use metapost's **infont** operator, which restricts the text to-betypeset to a single font, but returns an **picture** containing a **picture** for each character. The right-hand argument of **infont** should either be a (numerical) font id or the (cs)name of a font (without backslash).

One possible use of the infont operator is setting text along curves:

For the greatest amount of control, however, you will need the <code>glyph</code> <code>g</code> of <code>f</code> operator, which returns the contours that make up a glyph. It is a bit more versatile than its traditional metapost counterpart: <code>g</code> may also be the name of the glyph instead of its index, while <code>f</code> can be a font id or font name (as with <code>infont</code>).

A variant of glyph of is the contours t of f macro: it first typesets the string t in the same way as infont does (so that kerning and font shaping are

applied), but returns a (comma-separated) list of contours, such as may be used in a for loop. Due to rounding errors, the glyphs will not match exactly.

Be aware that the contours returned by these operators may be disjoint: a letter o, for example, will consists of two. This means you cannot recreate the characters by just filling each contour: this would turn the o into a filled-in circle. Instead, you must use multifill on the entire output of glyph of or contours of (see the next section).

Partial paths and the even-odd rule

You can fill or draw two or more disjoint paths in one go by using **nofill** as drawing operator for all paths but the last. This may make it easier to cut something out of a shape, since you do not have to worry about stitching the paths together.

While metapost fills paths according to the winding number, the pdf format also supports filling according to the even-odd rule. This has been made possible with the **eofill** and **eofilldraw** drawing statements, which can of course also be used as the final statement after a series of nofills.

The macros multi(draw|fill|filldraw|eofill|eofilldraw) take a list of paths between parentheses and can be followed by the usual drawing options. For example, multidraw (contours "example" of "tenbf") withpen currentpen scaled 1/10; will give the word example in a thin outline.

Finally, two handy clipping macros have been added: clipout and clipto, which both receive a list of paths as a 'text' parameter and either clip their ensemble out of the picture, or the picture to the ensemble.

Running lua from within metapost

You can call out to lua with runscript "lua code". For this purpose, each metapost instance carries around its own lua environment so that assignments you make are local to the instance. (You can of course order the global environment to be used by giving env = _G as option to \newmetapostinstance.)

If your lua snippet returns nothing, the runscript call will be invisible to metapost. If on the other hand it does return a value, that value will have to be translated to metapost. Numbers and strings will be returned as they are (so make sure the string is surrounded by quotes if you want to return a metapost string). You can return a point or colour by returning an array of two to four elements. For other return values, tostring() will be called.

Do keep in mind that metapost and lua represent numbers in different ways and that rounding errors may occur. For instance, metapost's decimal epsilon returns 0.00002, which metapost understands as 1/65536, but lua as 1/50000. Use the metapost macro hexadecimal instead of decimal for passing unambiguous numbers to lua.

Additionally, you should be aware that metapost uses slightly bigger points than tex, so that epsilon when taken as a dimension is not quite equal to 1sp. Use the metapost macro scaledpoints for passing to lua a metapost dimension as an integral number of scaled points.

Tiling patterns

The withpattern(<name>) added to a fill statement will fill the path with a pattern instead of a solid colour. If the patterns contains no colour information of itself, it will have the colour given by withcolor. Stroking operations (the draw part) will not be affected. Patterns will always look the same, irrespective of any transformations you apply to the picture.

To define a pattern, sketch it between beginpattern(<name>) ... endpattern(xstep, ystep); where <name> is a suffix and (xstep, ystep) are the horizontal and vertical distances between applications of the pattern. Inside the definition, you can draw the pattern using whatever coordinates you like; assign a value to the matrix transformation to specify how the pattern should be projected onto the page. This matrix will also be applied to xstep and ystep.

You can also change the internal variable **tilingtype** and the normal variable **painttype**, although the latter will be set to 1 automatically if you use any colour inside the pattern definition. Consult the pdf specification for more information on these parameters.

You can use text inside patterns, as in this example:

```
% define the pattern
picture letter; letter = maketext("a");
beginpattern(a)
    draw letter rotated 45;
    matrix = identity rotated 45;
endpattern(12pt,12pt);
% use the pattern
beginfig(1)
    fill fullcircle scaled 3cm withpattern(a) withcolor 3/4red;
    draw fullcircle scaled 3cm withpen pencircle scaled 1;
endfig;
```

A small pattern library is available in the minim-hatching.mp file; see the accompanying documentation sheet for an overview of patterns.

Other metapost extensions

You can set the baseline of an image with <code>baseline(p)</code>. There, <code>p</code> must either be a point through which the baseline should pass, or a number (where an <code>x</code> coordinate of zero will be added). Transformations will be taken into account, hence the specification of two coordinates. The last given baseline will be used.

You can write to tex's log directly with texmessage "hello".

You can write direct pdf statements with special "pdf: statements" and you can add comments to the pdf file with special "pdfcomment: comments". Say special "latelua: lua code" to insert a late_lua whatsit. All three specials can also be given as pre- or postscripts to another object. In that case, they will be added before or after the object they are attached to. Do note that all special statements will appear at the beginning of the image; use pre- and postscripts to drawing statements if the order matters.

Minim-mp also provides a few elementary macros and constants that are conspicuously absent from plain.mp; I hope their addition is uncontroversial. The constants are pi (355/113), fullsquare, unitcircle and the cmyk-colours cyan, magenta, yellow and key. The macros are clockwise, xshifted, yshifted,

hflip and vflip, where the flips are defined in such a way that p & hflip p gives the expected result.

Lua interface

In what follows, you should assume M to be the result of

```
M = require('minim-mp')
```

as this package does not claim a table in the global environment for itself.

You can open a new instance with nr = M.open {options}. This returns an index in the M.instances table. Run code with M.run (nr, code) and close the instance with M.close (nr). Images can be retrieved only with box_node = M.get_image(nr, [name]); omit the name to select the first image. Say nr_remaining = M.left(nr) for the number of remaining images.

Each metapost instance is a table containing the following entries:

```
jobname The jobname.

instance The primitive metapost instance.

results A linked list of unretrieved images.

status The last exit status (will never decrease).

catcodes Number of the catcode table used with btex ... etex.

env The lua environment for runscript.
```

Debugging

You can enable (global) debugging by saying debug_pdf to metapost or M.en-able_debugging() to lua. This will write out a summary of metapost object information to the pdf file, just above the pdf instructions that object was translated into. For this purpose, the pdf will be generated uncompressed. Additionally, a small summary of every generated image will be written to log and terminal.

Extending metapost

You can extend this package by adding new metapost specials. Specials should have the form "identifier: instructions" and can be added as pre- or postscript to metapost objects. A single object can carry multiple specials and a special "..." statement is equivalent to an empty object with a single prefix.

Handling of specials is specified in three lua tables: M.specials, M.prescripts and M.postscripts. The identifier above should equal the key of an entry in the relevant table, while the value of an entry in one of these tables should be a function with three parameters: the internal image processor state, the instructions from above and the metapost object itself.

If the identifier of a prescript is present in the first table, the corresponding function will replace normal object processing. Only one prescript may match with this table. Functions in the the other two tables will run before or after normal processing.

Specials can store information in the user table of the picture that is being processed; this information is still available inside the finish_mpfigure callback that is executed just before the processed image is surrounded by properly-dimensioned boxes.

The M.init_code table contains the code used for initialing new instances. In it, the string INIT will be replaced with the value of the format option (normally plain.mp).

Mathematics

This package gives a simple and higly-configurable way of using unicode and OpenType mathematics with plain LuaTeX, making use of most of the latter engine's new capabilities in mathematical typesetting. Also included are proper settings and definitions for nearly all unicode mathematical characters, as well as a few shorthands and helper macros that seemed useful additions.

Load the package by saying \input minim-math.tex; this will set up luatex for using opentype mathematical fonts and unicode math input. It will not, however, select mathematical fonts for you. That you will have to do for yourself; see below for instructions.

Styles and alphabets

Shorthand	Value of style	Result
\mup	\mathtt{up}/\mathtt{rm}	ABC
\mit	it	ABC
\mbf	bf	ABC
\mbfit	bfit	ABC
\mbb	bb	\mathbb{ABC}
\frak	frak	\mathfrak{ABC}
\bffrak	bffrak	ABC
\scr	cal/scr	\mathcal{ABC}
\bfscr	bfscr	\mathcal{ABC}

Styles without shorthand are sans/sf, sfit, sfbf, sfbfit, tt/mono and finally the special value clear for using the default style. You can use the shorthands directly in sub- and superscripts: v^{-} scr F will result in $v^{\mathcal{F}}$.

While math families are not used anymore for switching between styles (see below), you still can use \fam with the values 0, 1, 2, 4, 5, 6 or 7 for doing so. This means that plain tex's \rm, \it, \cal, \sl, \bf and \tt can still be used (at least in math mode).

Please note that \mup is not the right choice for upright multiletter symbols or operators: you should use \mord or \mop instead (see near the end of this chapter). For nonmathematical text, you should use \text instead of \mup.

The default properties of characters can be set with one of the following three commands:

```
\mathmap {character list} {style}
\mathclass {character list} {class}
\mathfam {character list} nr
```

There, style is one of the above and class is the name of a class as below. Finally, the character list should be a comma-separated list with elements of one of the following forms:

- 1. a list of characters, like abc or \partial or \mathbb{R} ;
- 2. a character range, like `A-`Z, 65-90 or "41-"5A;

- 3. one of the alphabets [L1]atin, [Gg]reek, or digits;
- 4. one of the style groups bold, boldgreek, sans, sansgreek, mono, black-board, fraktur or script;
- 5. the name of a math class: ord, op, bin, rel, fence, open, close or punct.

Note that unicode is somewhat irregular in its encoding of mathematical letters; this is taken into account when using ranges as under (2) above. Thus, `mscra-`mscrz really gives you all lowercase script characters, despite e.g. e being well outside that range.

The default style settings are \mathmap {latin, greek, Latin}{it}. Since the math family setting is not used anymore for selecting different styles, the default family of every symbol is zero. Instead, you can use \mathfam for mixing fonts (see below). The class option to \mathclass should be one of the names under 5.

Character variants

You can change the default appearance of several greek characters with \use-mathvariant {chars} or \usemathdefault {chars}, where chars is a list of normal greek characters. As in unicode but against tex's tradition, the variants are $\epsilon\vartheta\Theta\varkappa\varpi\varrho\phi$ and the defaults $\epsilon\vartheta\Theta\kappa\pi\rho\varphi$. The macros \usebararepsilon etc. have been updated to reflect the unicode variants.

The appearance of root symbols can be set with \closedroots ($\sqrt{2}$) and \normalroots ($\sqrt{2}$, the default).

Say \unicodedots to use the unicode dots characters $(\dots; \dots)$ and \traditionaldots to construct these characters from periods $(\dots; \dots; \dots)$, the default). Both settings affect the meaning of both the actual characters and the \xdots macros $(x \in \{1, v, c, a, d\})$. Unlike in traditional plain tex, the traditional dots are available in script sizes, too.

Say \decimalcomma and have commas appear as 1,2 instead of 1,2 (\nodecimalcomma restores the default). The explicit \comma, like \colon, will always be punctuation.

The behaviour of limits on integral signs can be set by redefining \intlimits (the default is \let \intlimits = \nolimits).

If you want to change the meaning (inside math mode) altogether for a single character, you can use the commands $\mbox{mathdef}$ and $\mbox{mathlet}$. For example, by default, you can use the letter h for the reduced planck constant \hbar ; this has been made so with $\mbox{mathdef}$ h \mbox{hbar} .

Setting up fonts

The minimum you need do to set up a mathematical font is this:

```
\scriptfont 0 = \tenmaths
\scriptscriptfont 0 = \tenmathss
```

Note that you only have to set up the font for a single family: opentype mathematical fonts typically contain all necessary variants of all mathematical characters. Therefore, the \fam setting has been made a no-op (use \setfam if you really need the old primitive) and the default family of all symbols has been set to zero.

As mentioned above, you can still change the family number of specific characters and this allows you to mix mathematical fonts. For instance, if you dislike the current blackboard bold characters, just assign a second font to family 1 and say \mathfam {blackboard} 1. Less useful are the parameters \accentfam, \radicalfam and \extensiblefam that control the family of all accents, radicals and extensibles.

Do note that various spacing constants are set according to the *last* math family that is assigned to. Therefore, you should assign your main math font to a family after all others.

Shorthands and additions

You can use \text for adding nonmathematical text to your equations. It will behave well in sub- and superscripts: \text{word}^\\text{word} gives word word. By default, the font used is the normal mathematical font. You can change this by setting the \textfam parameter to some nonzero value and assigning a different font to that family (see above). You probably want to do this, since most commonly-used mathematical fonts do not include a normal kerning table.

All the usual arrows can be made extensible by prefacing them with an x, including $\mbox{xmapsfrom}$. Alternatively, you can use $\mbox{$\rightarrow$}$ etc. as shorthands. Additionally, you can use the following:

Result
$\langle x , y angle$
$\langle x y\rangle$
$\left x\right ,\left\ x\right\ $
$x \stackrel{?}{=} y$
$x \overset{a}{+} y$
f^{-1} (cf. f^{-1})
$a \xrightarrow[down]{up} b$
$a \stackrel{up}{===} b$
$\frac{1}{2}, \frac{1}{2}, \frac{1}{2}$

Also new are the operators \Tr, \tr, \Span, \GL, \SU, \U, \SO, \O, \Sp, \im, \End, \Aut, \Dom and \Codom. You can define new operators with \newmathop and \newlargemathop: \newmathop{op} will define the new operator \op. For single use of an upright symbol, operator or large operator you can use \mord, \mop and \mlop. The difference between \mord and \mup is that \mord also applies the correct symbol spacing.

The accents \overbrace, \underbracket etc. allow a label between square brackets: $\$ underbrace [=1]{(x^2+y^2)}\$\$ gives

$$\underbrace{(x^2+y^2)}_{=1}.$$

Best practices

The following remarks on mathematical typesetting have no relation to the contents of this package; I have included them because I find them hard to remember.

- 1. \eqalign gives a vertically centered box and can occur many times in an equation, while \eqalignno and \leqalignno span whole lines (put the equation numbers in the third column). All assume the relation (or operator) appears at the right hand side of the ampsersand.
- 2. The command \displaylines can only have one column that spans the whole line (and you will have to add the equation number by hand).
- 3. Further alignment commands are \cases, \matrix, \pmatrix (with parentheses) and \bordermatrix (includes labels for lines and columns).
- 4. Finetuning alignments can be done with \smash, \phantom, \hphantom and \vphantom.
- 5. Small matrices like $\binom{1}{3} \binom{1}{4}$ can be made by misusing \choose or \atop.
- 6. If you start a line with a binary operator, put a {} before it: this way, tex recognises it as such.
- 7. Thin spaces $(\,)$ should be inserted: before dx, before units, after factorials and after $\$ dots if those are followed by a closing parenthesis.
- 8. Whether the differential operator should be set upright or not is as of yet an open question in mathematics.
- 9. You should prefer \bigr and \bigl etc. over \big, \Big, \bigg and \Bigg.
- 10. An overview of mathematical symbols, with control sequences and their availability in different fonts, can be found in unimath-symbols.pdf, which is part of the unicode-math package.

Hypertext

This chapter and the next document the support of the modern pdf features provided by the minim-pdf package. Load it by saying \input minim-pdf. The next chapter concerns the creation of tagged pdf; all other features of the package are described here.

Hyperlinks

For most simple cases, you can use \hyperlink [name {...} | url {...}] ... \endlink for linking to a named destination in your own document or to an external hyperlink respectively. There is no support for nonsimple cases.

A named destination can be created with \nameddestination \{\ldots\} (also in horizontal mode, unlike the backend primitive) and if you cannot think of a name, \newdestinationname should generate a unique one. If you need the latter twice, \lastdestinationname gives the last generated name.

Bookmarks

Bookmarks can be added with **\outline** [open|closed] [dest {name}] {title}. Add open or closed to have the bookmark appear initially open or closed (default), and say dest {name} for having it refer to a specific named destination (otherwise, a new one will be created where the **\outline** command appears).

A bookmark is automatically associated with the current structure element and the hierarchy of structure elements determines the nesting of bookmarks. Therefore, if you want nested bookmarks, you *must* precede the **\outline** command with a declaration of the current structure element, even if you have otherwise disabled tagging. See the next chapter on how to do this.

Page labels

If the page numbers of your document are not a simple sequence starting with 1, you can use \setpagelabels [pre {prefix}] style nr for communicating this to the pdf viewer. This command affects the page labels from the next page on: nr should be the numerical page number of that page. The prefix is prepended to each number and the style must be one of decimal, roman, Roman, alphabetic, Alphabetic or none. In the last case, only the prefix is used.

PDF/A

You can declare pdf/a conformance with \pdfalevel xy, with version $x \in \{1,2,3\}$ and conformance level $y \in \{a,b,u\}$. This will set the correct pdf version and pdfaid metadata. If the conformance level is 'a', tagging will be enabled (see the next chapter). Finally, a default RGB colour profile will be included. The conformance level can be queried from the \pdfaconformancelevel register.

Note that merely declaring conformance will not make your document pdf/a compliant, and that minim will not warn you if it is not. However, the features described in this chapter and the next should be enough to make pdf/a compliance possible.

Also note that there currently is no documented way of choosing a different colour profile from the default (i.e. the default rgb profile provided by the colorprofiles package). Should you need do that, you will have to do so manually, after disabling the automatic inclusion by saying \expandafter\let \csname minim:default:rgb:profile\endcsname = \relax.

Finally, note that pdf/a requires that spaces are represented by actual space characters and that discretionary hyphens are marked as soft hyphens (U+00AD). Since both features benefit accessibility and text extraction in general, they are enabled by default. You can disable them by setting \writehyphensandspaces to a nonpositive value.

Embedded files

You can attach (associate) files with \embedfile <options>. The file will be attached to the current structure element (see the next chapter) unless the global option is given: then it will be added to the document catalog. Arguments consisting of a single word can be given without braces and exactly one of the options file or string must be present.

```
file
          {...}
                  The file to embed.
          {...}
                  The string to embed.
string
global
                  Attach to the document catalog.
uncompressed
                  Do not compress the file stream.
                  The file's mime type.
mimetype {...}
moddate {...}*
                  The modification date (see * below).
desc
          {...}
                  A description (the /Desc key).
relation {...}
                  The /AFRelationship value as defined in pdf/a-3.
                  The file name (only required when writing a string).
name
          {...}
```

Lua module

The interface of the lua module (available via local M = require('minim-pdf')) should be stable by now. Though it contains lua equivalents for most tex commands described here, using them directly is not very ergonomical and not recommended. Please consult the source if you do want to use them anyway.

^{*} The modification date must be of the form yyyy[-m[m][-d[d]]]. A default moddate can be set with \setembeddedfilesmoddate {default}. The default date will be expanded fully at the time of embedding. With the minim-xmp package, a useful setting is \setembeddedfilesmoddate {\getmetadata date}.

Tagged PDF

This chapter is a continuation of the previous and describes the parts of minim-pdf that concern the creation of tagged pdf. All features in this chapter must be explicitly enabled by setting \writedocumentstructure to a positive value. This will be done automatically if you declare pdf/a conformance (see above).

This part of the package is rather low-level and this chapter rather technical. For a more general introduction to and discussion of tagged pdf, please read the (excellent) manual of latex's tagpdf package.

Purpose, limitations and pitfalls

The main purpose of this package is semi-automatically marking up the (hierarchical) structure of your document, thereby creating so-called tagged pdf. The mechanism presented here is not quite as versatile as the pdf format allows. The most important restriction is that all content of the document must be seen by tex's stomach in the *logical* order.

Furthermore, while the macros in this package are sophisticated enough that tagging can be done without any manual intervantion, it is quite possible and rather easy to generate the wrong document structure, or even cause syntax errors in the resulting pdf code. You should always check the result in an external application.

This is the full list of limitations, pitfalls and shortcomings:

- 1. Document content must be seen by tex in its logical order (although you can mark out-of-order content explicitly if you know what you are doing; see below).
- 2. The contents of \localleftbox and \localrightbox must be marked manually, probably as artifact.
- 3. You must mark page header, page footer and footnote rule yourself; no default is set.
- 4. There currently is no way of marking xforms or other pdf objects as content items of themselves.
- 5. The content of xforms (i.e. pdf objects created by \useboxresource) should not contain tagging commands.
- 6. Likewise, you should be careful with box reuse: it might work, but you should check.
- 7. This package currently only supports pdf 1.7 tagging and is not yet ready for use with pdf 2.0.

In order to help you debugging, some errors will refer you to the resulting pdf file. If you get such errors, decompress the pdf and search for the string 'Warning:'. It will appear in the pdf stream at the exact spot the problem occurs.

General overview

When speaking about tagging, we have to do with two (or perhaps three) separate and orthogonal tagging processes. The first is the creation of a hierarchical document structure, made up of structure elements (SEs). The document structure describes the logical structure of a document, made up of chapters, paragraphs, references etc. The second tagging process is the tagging of marked content items (MCIs): this is the partition of the actual page contents into (disjoint) blocks that can be assigned to the proper structure element. Finally, as a separate process, some parts of the page can be marked as artifacts, excluding their content from both content and structure tagging.

When using this package, artifacts and structure elements (excluding paragraphs; see below) must be marked explicitly, while marked content items will be created, marked and assigned automatically. There is some (partial and optional) logic for automatically arranging structure elements in their correct hierarchical relation.

The mechanism through which this is achieved uses attributes and whatsits for marking the contents and borders of SEs, MCIs and artifacts. At the end of the output routine, just before the pdf page is assembled, this information will be converted into markers inserted in the pdf stream.

Marked content items

Content items are automatically delineated at page, artifact and structure element boundaries and terminated at paragraph or display skips. This should relieve you from any manual intervention. However, if you run into problems, the commands below might be helpful.

Use of ActualText, Alt or Lang attribute on MCIs, while allowed by the pdf standard, is not supported by this package. You should set these on the structure element instead.

The begining and ending of a content item can be forced with \start-contentitem and \stopcontentitem, while \ensurecontentitem will only open a new content item if you are currently outside any. If you need some part to be a single content item, you can use \startsinglecontentitem ... \stopsinglecontentitem. This will disable all SE and MCI tagging inside.

Tagging (both of MCIs and SEs) can be disabled and re-enabled locally with \stoptagging and \starttagging.

Artifacts

Artifacts can be marked in two ways: with \markartifact {type} {...} or with \startartifact {type} ... \stopartifact. The type is written to the pdf attribute dictionary directly, so that if you need a subtype, you can write e.g. \startartifact {Pagination /Subtype/Header} etc.

Inside artifacts, other structure content markers will be ignored. Furthermore, this package makes sure artifacts are never part of marked content items, automatically closing and re-opening content items before and after the artifact. While the pdf standard does not require the latter, not enforcing this seems to confuse some pdf software.

Document structure

Like artifacts, structure elements can be given as \markelement {Tag} {...} or \startelement {Tag} ... \stopelement {Tag}. Here, in many cases the \stopelement is optional: whenever opening an element would cause a nesting of incompatible Tags, the current element will be closed until such a nesting is possible. Thus, opening a TR will close the previous TR, opening an H1 will automatically close any open inline or block structure elements, opening a TOCI will close all elements up until the current TOC etc. etc.

As a special case, the tags Document, Part, Art, Sect and Div (and their aliases) will try and close all open structure elements up to and including the last structure element with the same tag. (An alias will of course only match the same alias.)

While the above can greatly reduce the effort of tagging, the logic is neither perfect nor complete. You should always check the results in an external application. Particular care should be taken when 'skipping' structure levels: the sequence chapter – subsection – section will result in the section beneath the subsection. If you are in doubt whether an element has been closed already, you can use \ensurestopelement {Tag} instead of \stopelement to prevent an error being raised.

All these helpful features can be disabled by setting \strictstructuretagging to a positive value. Then, every structure element will have to be closed by an explicit closing tag, as in xml. In this case, \stopelement and \ensurestopelement will be equivalent.

By default, P structure elements are inserted automatically at the start of every paragraph. The tag can be changed with \nextpartag {Tag}; leaving the argument empty will prevent marking the next paragraph. Keep in mind that the reassignment is local: if a paragraph marked with \nextpartag starts inside a group, it will not reset. Auto-marking paragraphs can be (locally) disabled or enabled by saying \markparagraphsfalse or \markparagraphstrue.

Structure element aliases

New structure element tags can be created with \addstructuretype [options] Existing Alias. This will create a new structure tag named Alias with the same properties as Existing. The properties can be modified by specifying options: these will set values of the corresponding entry in the structure_types table (see the lua source file for this package). Any aliases you declare will be written to the pdf's RoleMap only if they have actually been used.

Manipulating the logical order

With the process outlined above, the logical order of structure elements has to coincide with the order in which the SEs are 'digested' by tex. This, together with the marked content items being assigned to structure elements in their order of appearance, lies behind the restriction that logical and processing orders should match.

With manual intervention, this restriction can be relaxed somewhat. Issuing the pair \savecurrentelement ... \continueelement will append the MCIs following \continueelement to the SE containing \savecurrentelement. Since the assignments made here are global, this process cannot be nested; in more

complicated situations you should therefore use \savecurrentelementto\name ... \continueelementfrom\name which restores the current SE from a named identifier \name.

Structure element options

The \startelement command allows a few options that are not mentioned above: its full syntax is \startelement <options> {Tag}. The three most useful options are alt for setting an alt-text (the /Alt entry in the structure element dicionary), actual for a text replacement (/ActualText) and lang for the language (/Lang; see the next section). The alternative and actual texts can also be given after the fact with \setalttext{...} and \setactualtext{...}; these apply to the current structure element.

Structure element attributes can be given with attr <owner> <key> <value>, e.g. attr Layout Placement /Inline. Note that for the owner and key the initial slash must be omitted; the value on the other hand will be written to the pdf verbatim. Any number of attributes can be added.

Finally, structure element classes can be given with the class <classname> keyword, which can be repeated. Classes can be defined with \newattribute-class classname <attributes> where <attributes> can be any number of attr statements as above.

Languages

If you do not specify a language code for a structure element, its language will be determined automatically. In order for this to work, you must associate a language code to every used language; you can do so with \setlanguagecode name code, where name must be an identifier used with \uselanguage {name} and code must be a two or three-letter language code, optionally followed by a dialect specification, a country code, and/or some other tag. Note that the language code is associated to a language name, not to the numerical value of the \language parameter. This allows you to assign separate codes to dialects.

There is a small set of default language code associations, which can be found in the file minim-languagecodes.lua. It covers most languages defined by the hyph-utf8 package, as well as (due to their ubiquitous use) some ancient languages.

An actual language change introduced by \uselanguage will not otherwise be acted upon by this package. Therefore, you will probably want to add \startelement{Span} after every in-line invocation of \uselanguage.

You can set the document language with \setdocumentlanguage language code. If unset, the language code associated with the first \uselanguage statement will be used, or else und (undetermined). The only function of the document language is that it is mentioned in the pdf catalog: it has no other influence.

New languages can be declared with \newnamedlanguage {name} {lhm} {rhm} and new dialects with \newnameddialect {language name} {dialect name}. Dialects will use the same hyphenation patterns (and will indeed have the same \language value) as their parent languages; newly declared languages will start with no hyphenation patterns. Do note that you will probably also have to specify language codes for new languages or dialects.

This package ensures the existence of the nohyph, nolang, uncoded and undetermined dummy languages, all without hyphenation.

Helper macros

For marking up an entry in a table of contents, you can use the macro \marktocentry {dest} {lbl} {title} {filler} {pageno}, which should insert all tags in the correct way. (The dest is a link destination and can be empty; the lbl is a section number and can also be empty.)

For marking up tables, a whole array of helper macros is available. First, \marktable should be given before the \halign. Then, in the template, the first cell should start with \marktablerow and each subsequent cell with \marktablecell. If your table starts with a header, insert \marktableheader before it and \marktablebody after. Before a table footer, insert \marktablefooter.

For greater convenience, insert just \automarktable before the \halign. Then you can leave out all the above commands (unless you \omit a template of course). This assumes the table has a single header row and more than one column. If you use a table for typesetting a list, you can use \marktableaslist instead, which marks the first column as list label and the second column as list item. Of course, this only works with two-column tables.

Finally, you can auto-tag equations as formulas by specifing \autotagformulas. This is especially dangerous, because sometimes equations are used for lay-out and should not be marked as such. After the latter command, auto-tagging can be switched off and on with \stopformulatagging and \startformulatagging.

The source of the equation can be associated with the Formula structure element in various ways, which can be configured with \includeformulasources {option}, where the option must be one of none, actualtext, attachment or both. The actualtext option will use the unexpanded source code of the equation, surrounded by the appropriate number of dollar signs. The attachment option will only work if \pdfaconformancelevel equals three: then the source of the formula will be attached in an embedded file with the /AFRelation set to Source. The name of this file can be changed by redefining \formulafilename inside the equation. The default value is both.

Metadata

This package enables simple XMP (eXtensible Metadata Platform) packet inclusion and will automatically generate pdf/a extension schemas. Use it by saying \input minim-xmp.tex. Thereafter, you can use \setmetadata key {value} and \getmetadata key for setting and retrieving document-level metadata values.

You do not need this package if you have your metadata ready-made in a separate file, for then you can simply say

```
\immediate\pdfextension obj uncompressed
    stream attr {/Type/Metadata /Subtype/XML}
    file {your-file.xmp}
\pdfextension catalog
    {/Metadata \pdffeedback lastobj 0 R}
```

Setting metadata

Metadata fields that contain (ordered or unordered) lists will be split on the \metadataseparator character; this is a semicolon by default. Alternatively, you can just make multiple assignments: these will be concatenated.

Where applicable, language alternatives can be given like \setmetadata /de dc:title {...} or \setmetadata /{de_DE} dc:title {...}. Braces are necessary in the second case because the catcode of the underscore is not 11 or 12. When no alternative is given, the value x-default will be used.

Instead of using \setmetadata, multiple fields can be set in one go with \startmetadata. This way is particularly useful when assigning structured data to a key (see later on). In this example, key1 contains a normal value, key2 language alternatives and key3 structured data:

```
key1 {...}
key2 {... (default) ...}
    /alt1 {...}
    /alt2 {...}
key3
    /field1 {...}
    /field2 {...}
```

\startmetadata

Since metadata values are read by lua as text, linebreaks and paragraphs are not preserved. You can work around this by saying {\def\par{\Uchar"A\Uchar"A}\setmetadata abstract {...}}.

Getting metadata

stopmetadata

Metadata values can be retrieved again with **\getmetadata key**. This command is fully expandible.

If the data is a list, it will be returned according to the current value of \metadataseparator. If the data has language alternatives, the x-default value will be returned: the alternatives are accessible by \getmetadata /lang key.

For structured types (discussed below), \getmetadata /field key will return the value of a single field and \getmetadata key will return all fields as /{field1} {value1} /{field2} {value2} ... (this can be used again as input to \startmetadata).

Supported metadata keys

Initially, the \setmetadata and \getmetadata recognise all pdf/a compatible fields in the pdf, pdfaid, dc, xmp, xmpMM and xmpRights namespaces. Keys should be prefixed with their namespace, e.g. dc:creator or xmp:CreatorTool. Note that the dc namespace has lower-case fields; field names are case-sensitive.

Because the precise details of the above metadata namespaces can be confusing, you might want use one of the aliases author (dc:creator), title (dc:title), date (dc:date and xmp:CreateDate), language (dc:language), keywords (dc:subject and pdf:Keywords), publisher (dc:publisher), abstract (dc:description), copyright (dc:rights), version (xmpMM:VersionID) and identifier (dc:identifier). New aliases can be defined in the aliases table of the lua module.

Adding new keys and schemas

New metadata namespaces can be added in the following way:

```
require('minim-xmp').add_namespace(
   'Example namespace', 'colours',
   'http://example.com/minim/colours/', {
        -- metadata keys
      Favourite = { 'Colour', 'The author's favourite colour' },
   }, {
        -- value types
      Colour = { 'RGB Colour', {
            R = { 'Integer', 'Red component' },
            G = { 'Integer', 'Green component' },
            B = { 'Integer', 'Blue component' }
      }, prefix = 'c' },
})
```

This will setup a namespace with prefix colours and one key: Favourite, of type Colour. That value type happens to be a structured type with three fields, which are also described. You can now use this namespace as

```
\ or the equivalent but more verbose
```

```
</colours:Favourite>
</rdf:Description>
```

If use of the pdf/a format is detected (i.e. a pdfaid entry is present in the metadata), the following pdf/a extension schema will also be generated:

```
<rdf:Description rdf:about=""
    xmlns:pdfaExtension="http://www.aiim.org/pdfa/ns/extension/"
    xmlns:pdfaSchema="http://www.aiim.org/pdfa/ns/schema#
   xmlns:pdfaProperty="http://www.aiim.org/pdfa/ns/property#"
   xmlns:pdfaType="http://www.aiim.org/pdfa/ns/type#"
   xmlns:pdfaField="http://www.aiim.org/pdfa/ns/field#" >
  <pdfaExtension:schemas>
      <rdf:li rdf:parseType="Resource">
        <pdfaSchema:schema>Example namespace</pdfaSchema:schema>
        <pdfaSchema:namespaceURI>http://example.com/minim/colours/</pdfaSchema:namespaceURI>
        <pdfaSchema:prefix>colours</pdfaSchema:prefix>
        <pdfaSchema:property>
          <rdf:Seq>
            <rdf:li rdf:parseType="Resource">
              <pdfaProperty:name>Favourite</pdfaProperty:name>
              <pdfaProperty:valueType>Colour</pdfaProperty:valueType>
              <pdfaProperty:category>external</pdfaProperty:category>
              <pdfaProperty:description>The author's favourite colour</pdfaProperty:description>
            </rdf:li>
          </rdf:Seq>
        </pdfaSchema:property>
        <pdfaSchema:valueType>
          <rdf:Seq>
            <rdf:li rdf:parseTvpe="Resource">
              <pdfaType:type>Colour</pdfaType:type>
              <pdfaType:namespaceURI>http://example.com/minim/colours/</pdfaType:namespaceURI>
              <pdfaType:prefix>c</pdfaType:prefix>
              <pdfaType:description>RGB Colour</pdfaType:description>
              <pdd><pdfaTvpe:field>
                <rdf:Seq>
                  <rdf:li rdf:parseType="Resource">
                    <pdfaField:name>B</pdfaField:name>
                    <pdfaField:valueType>Integer</pdfaField:valueType>
                    <pdfaField:description>Blue component</pdfaField:description>
                  </rdf:li>
                  <rdf:li rdf:parseType="Resource">
                    <pdfaField:name>G</pdfaField:name>
                    <pdfaField:valueType>Integer</pdfaField:valueType>
                    <pdfaField:description>Green component</pdfaField:description>
                  </rdf:li>
                  <rdf:li rdf:parseType="Resource">
                    <pdfaField:name>R</pdfaField:name>
                    <pdfaField:valueType>Integer</pdfaField:valueType>
                    <pdfaField:description>Red component</pdfaField:description>
                  </rdf:li>
                </rdf:Sea>
              </pdfaType:field>
            </rdf:li>
          </rdf:Seq>
        </pdfaSchema:valueTvpe>
      </rdf:1i>
    </rdf:Bag>
  </pdfaExtension:schemas>
</rdf:Description>
```

You probably will not need defining your own value types, so in most cases you should omit the fifth argument to add_namespace. If you do define a new value type, you can specify its prefix if it differs from the namespace prefix (as is done above) and likewise its uri identifier if it differs from the namespace URI.

List types can be given as 'Bag TypeName' or 'Seq TypeName'; language alternatives as 'Lang Alt'. All other types will be treated as 'Text', though for 'Boolean', 'Integer' and 'Date' some validation is performed when setting values.

Additional metadata value type handling can be defined in the getters and setters tables of the lua module. Appropriate entries to those tables will be generated automatically for new structured types (which is why you could set the colour like we did above). Value types without fields, however, will be stored and retrieved as if they were Text until you provide another way.

Generated XMP

All metadata will be written to the PDF file uncompressed.

If the document-level metadata contains values in the pdfaid namespace, metadata extension schemas will be appended to the document-level metadata packet automatically. These extension schema's will only include keys that have been set somewhere, though they need not have been set in the document-level metadata. No extension schemas are generated for the built-in namespaces, as they are already included in the pdf/a standards.

Programming macros

This chapter describes the programming helper modules on which all the above modules depend. It mainly concerns register allocation, callback management and format file inclusion.

They can be loaded separately by saying \input minim-alloc; thereafter, you can use local M = require('minim-alloc') to access the lua interface. In this chapter, when discussing lua functions, you are assumed to have issued the latter statement, so that the table M refers to the contents of this module.

The callback-related code lives in a separate file that can and must be loaded separately as local C = require('minim-callbacks'). This is the only file in this collection that does not itself depend on the minim-alloc module.

There is a large functional overlap between this module and the ltluatex package. You can use both at the same time, however, and the order in which you load both packages should not matter.

Format files

A major motivation for writing this module (and not, instead, depending on ltluatex.tex) is the ability to write lua-heavy code that can be safely included in format files. For this purpose, the register allocation functions described below allow ensuring that the allocation is made only once.

Apart from registers, you need only do two more things to make your code format file safe. The first is saying M.remember('your-file.lua') somewhere, anywhere. This will mark your file for inclusion in the format. At the start of every job, all remembered files will be executed (in order) and their return values will be stored to be retrieved whenever you say require('your-file'). Note that while this feature does not improve speed in any meaningful way, it will ensure the lua file used by the format is identical to the one used to create it.

It does mean, however, that your file may be executed twice: once when building the format and once when the format is used. In most cases (e.g. callback registration) this is exactly what you want. Sometimes however, you may need to store variable (configurable) data in the format file. You can do this by saying local t = M.saved_table('identifier', default-table). This will retrieve the table from the format file if possible; otherwise, it will return default-table and mark it to be saved to the format. A missing second argument is equivalent to an empty table. Saved tables may only contain (arbitrary but non-cyclic nestings of) tables, numbers and strings.

Register allocation

For allocating the new luatex registers, you can use the following: \newfunction, \newattribute, \newhatsit, \newluabytecode, \newluachunkname, \newcatcodetable and \newuserrule. Note the one difference with ltluatex, which has \newluafunction instead. (The reason for this is that ltluatex, instead of a more sensible method, uses this macro for determining whether it has been read before.) Internally, the very same counts are used for keeping track of register allocation as in ltluatex. Their effect should therefore be identical in all circumstances, with one exception: no bounds checking is performed on any

allocation macro defined by minim. Please do not go and use more than sixty five thousand different whatsits.

All the above and all traditional registers can be allocated from within lua as well, using M.new_count('name'), M.new_whatsit('name') etc. All return the allocated number. The (optional) string name prevents the same allocation from being made twice: if another register has been retrieved with the same name, the number of that register will be returned. You will need this when you want to allow your lua code to be included in a format file; it has nothing to do with the tex-side \countdef and the like.

If you want to access from lua a register defined in tex, the function M.registernumber('name') will give you the index of register \name.

Besides \newluachunkname \name, you can also use \setluachunkname \name \actual name} to enter the value of the name directly.

Finally, for the registers for which etex defines a local allocation macro (and for those only), you can use M.local_count() etc. These allocation functions take no parameters.

Callbacks

As noted at the beginning of this chapter, the callback functions are only available after you say local C = require('minim-callbacks').

The simple function of this module is allowing multiple callbacks to co-exist. Different callbacks call for different implementations, and some callbacks can only contain a single function. Its interface matches the primitive interface, with C.register(callback, fn), C.find(callback) and C.list() taking the same arguments. In addition to these, C.deregister(fn) will allow you to remove a callback. This is necessary when you want to remove a callback from a list or from the bottom of a stack. The fn variable should point to the same object.

Any callbacks that are already assigned before loading this module will be preserved and the primitive callback interface is still available, though callbacks registered through the latter will actually use the new functions. Ltluatex may be loaded either before or after this module.

You can create your own callbacks with C.new_callback(name, type). The type should be one of the types mentioned below or 'single' for callbacks that allow only one function. If the name is that of a primitive callback, new registrations will target your new callback. You can call the new callback with C.call_callback(name, ...), adding any number of parameters.

Callbacks of type node operate on a node list: for these, all registered functions will be called in order, each function receiving the result of the last. After one function returns false, no others will be called. Callbacks of this type are pre_linebreak_filter, post_linebreak_filter, hpack_filter, vpack_filter, pre_output_filter and mlist_to_mlist.

Similarly, for the data callbacks process_input_buffer, process_output_buffer and process_jobname, all registered functions will be called in order on the output of the previous. Returning false will in this case result in the output of the previous function passing to the next.

For stack callbacks, a stack is kept and only the top function on the stack will be called. These are mlist_to_hlist, hpack_quality, vpack_quality,

hyphenate, linebreak_filter, buildpage_filter and build_page_insert. Register nil at the callback to pop a function off the stack.

Finally, for the simple callbacks uselanguage, contribute_filter, pre_dump, wrapup_run, finish_pdffile, finish_pdfpage, insert_local_par, ligaturing, kerning and process_rule. all registered functions are called in order with the same arguments.

Two callbacks are new: the new mlist_to_mlist callback is called before mlist_to_hlist and should not convert noads to nodes, while the uselanguage callback is called from \uselanguage.

If you create a new callback with a number for a name, that callback will replace the **process_rule** callback when its number matches the index property of the rule.

Programming helpers

Optional keyword arguments to tex macros can be defined with help of M.options_scanner(). An example from the definition of minim-pdf's \outline:

```
local s = M.options_scanner()
          :keyword('open', 'closed')
          :string('dest')
          :scan()
s.title = token.scan_string()
M.add_bookmark(s)
```

Here, the keyword function adds two opposite keywords: if one is present, its value will be set to true and the other's to false (the second keyword is optional). The string function stores the result of token.scan_string under its key. Of the same form you have int, glue, dimen, argument, word and list. All these take an optional second argument: if true then the keyword can be repeated and its values will be stored as a list.

The scan function, finally, scans all keywords, which may appear in any order. You can give it a table with default values. In the example given above, the argument s to M.add_bookmark will consist of a table with at most the following entries: open, closed, dest and title, though entries whose keywords do not occur will not be present.

This function is particularly useful when used together with M.luadef('csname', function, ...), which defines primitive-like tex macros from lua. There, function can be any function (it will be assigned a lua function register) and at the place of the dots you may append 'protected' and/or 'global'.

Miscellaneous functions

The small functions M.msg(...), M.log(...) and M.err(...) include a call to M.string.format; additionally, M.amsg(...) and M.alog(...) do not start a new line.

Both ${\tt M.unset}$ and ${\tt \unset}$ contain the value ${\tt -0x7FFFFFF}$ that can be used for clearing attributes.

When writing data to pdf literals, M.pdf_string(...), M.pdf_name(...) and M.pdf_date(...) may be useful: they produce strings that can be written to the pdf directly. Surrounding <> or () characters or a leading / will be included

in the return value. The M.pdf_date function expects a value of the form yyyy[-mm[-dd]] and returns a date of the form (D:yyyymmdd). The function M.pdf_string is also available to tex through the macro \pdfstring.

Finally the function M.table_to_text(table) may be useful when debugging lua code: it dumps a table as a (lua-readable) string. Cyclic references will spin in into an eternal loop, however.

Miscellaneous helper macros

On the tex side, \voidbox, \ignore, \spacechar, \unbrace, \firstoftwo and \secondoftwo should be self-explanatory and uncontroversial additions. For looking ahead, you can use \nextif \token {executed if present} {executed if not} or its siblings \nextifx and \nextifcat. For defining macros with optional arguments, \withoptions[default]{code} will ensure something within square brackets follows code.

Finally, \splitcommalist {code} {list} will apply code to every nonempty item on a comma-separated list. Items of the list will be re-tokenised and have surrounding spaces removed. This macro is fully expandable.

Because of their usefulness and simplicity, these macros have been made available without special characters in their names; I hope you can tolerate their presence. Please let me know if their names clash with something important.