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Literate data analysis with Stata and Markdown

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Abstract. In this article, I introduce `markstat`, a command for combining Stata code and output with comments and annotations written in Markdown into a beautiful webpage or PDF file, thus encouraging literate programming and reproducible research. The command tangles the input separating Stata and Markdown code, runs the Stata code, relies on Pandoc to process the Markdown code, and then weaves the outputs into a single file. HTML documents may include inline and display math using MathJax. Generating PDF output requires access to \LaTeX and a style file from Stata but works with the same input file.

Editors' note. Stata 15, released while this article was in production, has support for Markdown and dynamic documents. However, `markstat` can produce HTML and PDF documents with the same script and has other distinctive features. For a detailed comparison, see <http://data.princeton.edu/stata/markdown/stata15>.

Keywords: pr0067, markstat, Markdown, Pandoc, \LaTeX literate programming, dynamic documents, reproducible research

1 Introduction

Donald Knuth, author of *The Art of Computer Programming* and the creator of \TeX , is a strong believer in documenting computer programs. He argues that when we write a program, we are not just providing instructions for the computer to complete a task but also communicating to other human beings exactly what it is we are trying to do. He believes that we can achieve much higher documentation standards if we view programs as works of literature, hence, his advocacy of “literate programming” (Knuth 1992).

These ideas apply equally well, if not more forcefully, to the field of data analysis, where careful documentation of all the steps followed, including data processing, data analysis, and the production of tables and figures, is essential to help ensure reproducibility of results. The most efficient way to accomplish this objective is to integrate the data analysis code with the narrative that explains the steps taken and the results obtained, preferably in a single document, in an approach I like to call “literate data analysis”, a term coined by Leisch (2002); see also Rossini (2001) for an early survey.

The purpose of this article is to introduce a Stata command that will help applied researchers do literate data analysis. The idea is quite simple. We prepare a file that uses Markdown to communicate with the reader and Stata to talk to the computer. Markdown is a simple markup language that is very easy to learn. And of course, you know Stata. The input is a plain text file that can be edited using Stata’s code editor,

which also means that we can select and run the Stata commands while we are authoring our piece. When the file is ready, we run it through the `markstat` command, which tangles or separates the Markdown and Stata code, runs each in turn, and then weaves the outputs together into a nice webpage or PDF file.

I believe this command will help us climb what Barba (2016) has called “the hard road to reproducible research”, encouraging and facilitating documentation of each stage of our work:

- At the data processing stage, instead of a few cryptic comments in a do-file, we can describe all the steps used to wrangle the raw data into analysis variables, producing a nicely formatted and readable document.
- At the data analysis stage, we can include the code; explain the reasons for trying particular models; include output, tables, and figures; and comment on the results, all without tedious and error-prone cutting and pasting.
- At the presentation stage, we can produce a report that focuses on the results, with an option to hide the actual commands used so that they are not shown in the final document.

The command may also be used to produce teaching materials showing how to do statistical analysis with Stata, in which case we will probably want to include all the code in the resulting handout, webpage, or blog post.

In all cases, however, the original Stata Markdown script remains as a complete and reproducible record of exactly how everything was done.

Documents that combine code and annotations are often called dynamic documents, not because they are live or interactive as Xie (2016) has noted, but simply because if the data change, or if we want to tweak the code, all we need to do is rerun the input script and all the output will be updated automatically. There is a lot more to reproducible research than producing dynamic documents (see, for example, Peng [2009] for a short overview), but this is at least a step in the right direction. The R community has excellent tools for reproducible research (see the book by Gandrud [2015], for example), and part of my aim here is to help bring similar tools to the world of Stata.

My approach is different from lower-level commands that generate HTML or PDF output, such as the `ht` suite by Quintó et al. (2012) or Stata’s own PDF Mata classes. It is also different from solutions that produce publication-quality tables, often with an option to export to \LaTeX , Word, or Excel, such as `outreg` (Gallup 1999), `outreg2` (Wada 2005), `esttab` (Jann 2005), or `tabout` (Watson 2016), although it can work with some of these. It is similar to approaches that embed HTML, \LaTeX , or Markdown annotations in special comment blocks in Stata do-files, such as `webdoc` (Jann 2016a), `texdoc` (Jann 2016b), `markdoc` (Haghish 2016), or my earlier `weave`. But with `markstat`, I embed Stata code in Markdown, do not require knowledge of HTML or \LaTeX , and put a high premium on making the input script clean and readable “as is”, just like Markdown itself. My solution is thus closer in spirit to (if less ambitious than) R’s `rmarkdown`

(Allaire et al. 2016), which builds on `knitr` (Xie 2016), itself a descendant of `sweave` (Leisch 2002), all of these R functions. It is possible to weave Stata code with `knitr` in R—as noted, for example, by Hemken (2015)—but I do not require running R to run Stata. The next section has an example.

2 Sample input

The `markstat` command is available from the Statistical Software Components archive and can be installed by typing `ssc install markstat`. You also need to install Pandoc as explained in section 4.

The basic idea here is to prepare a file that contains annotations written in Markdown and Stata code, which appears in blocks indented one tab or four spaces, as in the following example:

```
Stata Markdown
-----

Let us read the fuel efficiency data that ships with Stata

    sysuse auto, clear

To study how fuel efficiency depends on weight it is useful to
transform the dependent variable from "miles per gallon" to
"gallons per 100 miles"

    gen gphm = 100/mpg

We then obtain a fairly linear relationship

    twoway scatter gphm weight || lfit gphm weight, ///
        ytitle(Gallons per 100 Miles) legend(off)
    graph export auto.png, width(500) replace

! [Fuel Efficiency by Weight] (auto.png)

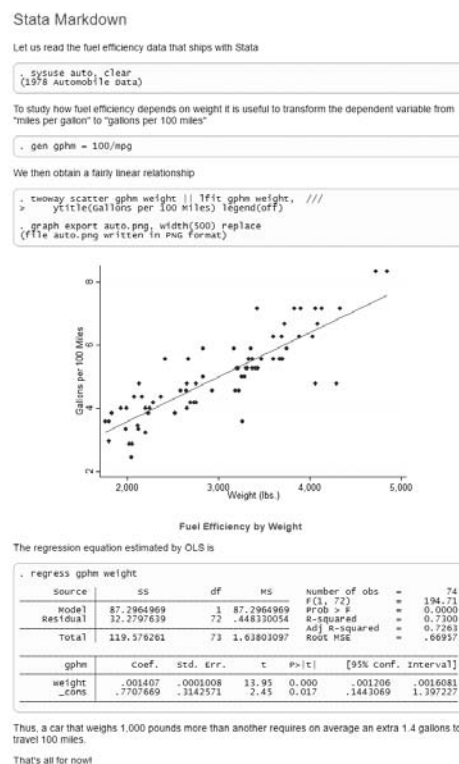
The regression equation estimated by OLS is

    regress gphm weight

Thus, a car that weighs 1,000 pounds more than another requires
on average an extra 1.4 gallons to travel 100 miles.

That's all for now!
```

Saving the file as `auto.stmd` and running `markstat using auto` generates the webpage shown at <http://data.princeton.edu/stata/markdown/auto>. A screenshot of the webpage is shown below, in figure 1.

Figure 1. Screenshot of `auto.html`

The `markstat` command extracts the Markdown and Stata code into separate `.md` and `.do` files, taking care to mark where the code blocks came from. It then runs the Markdown code through an external program called Pandoc, runs the do-file through Stata, and then weaves all the output together into a beautiful webpage.

There are options to generate a PDF file instead of HTML and to use the MathJax library to render equations on a webpage. But before I explain these options, let me tell you a bit about Markdown and Pandoc.

3 Markdown

Markdown is a lightweight markup language invented by John Gruber. It is easy to write, and more importantly, it was designed to be readable “as is”, without intrusive markings. Yet it can easily be converted into valid HTML or PDF.

This section is a quick introduction to Markdown, and you can refer to [Gruber’s \(2004\) *Markdown: Basics*](#) for more information. There is an ongoing effort to standardize Common Markdown, with reference implementations in C and JavaScript; visit <http://commonmark.org> for details.

In Markdown, you create a heading by “underlining” your text using `===` for a level 1 heading and `---` for a level 2 heading (as we did in our example). You can also define headings at levels one to six by starting a line with one to six hashmarks, as in `### A level 3 heading`.

You define a paragraph break by leaving a blank line. If you need a line break, end the line with two or more spaces (which are hard to see) or end the line with `\`.

To indicate emphasis using an *italic* style, type an asterisk or underscore on both sides of the text, as in `*italic*` or `_italic_`. For strong emphasis using a **bold** font, type two asterisks or underscores on both sides of the text, as in `**bold**` or `__bold__`. For a monospace font suitable for code, type a backtick on both sides of the text, as in ``regress`` to refer to the `regress` command.

Create a list by starting a line with `*`, `+`, or `-` for a bulleted/unordered list or with `1.` for a numbered/ordered list. You add items to a list by starting a line with the same symbol or with a number. Items in ordered lists are numbered consecutively regardless of which numbers you use. To end the list, you enter a blank line.

You can link to another document by putting the anchor in square brackets and the link in parentheses, as in `[GR’s website] (http://data.princeton.edu)`.

To link to an image, start with a bang (exclamation mark), type a title in square brackets, and end with the source of the image in parenthesis. An illustration from our example above is `![Fuel Efficiency by Weight](auto.png)`.

An important feature of Markdown is that you can include HTML if you wish. For example, we could have coded the image as `` or a line break as `
`. However, this is not recommended if the aim is to generate a PDF document.

4 Pandoc

To convert Markdown to HTML (or other formats), you need a document converter. I find that Pandoc works very well and is easy to install, with binaries for Linux, Mac, and Windows, so that is what we will use. Please visit <http://pandoc.org/installing> to download and install the program, unless of course it is already installed in your system.

To tell Stata where Pandoc was installed, we use the `whereis` command (Rodríguez 2017b), available from the Statistical Software Components archive. Just type `ssc install whereis`. This command maintains a registry of ancillary programs. To register the location of Pandoc, you type in Stata

```
whereis pandoc full-path-to-pandoc-executable
```

where the path should be quoted if it contains spaces.

For example, on a Mac the full path may be `/usr/local/bin/pandoc`, and on a Windows system it may be `"c:\program files (x86)\pandoc\pandoc.exe"`. If you need assistance finding the location of Pandoc, try `help whereis` and read the section *Tips for Users*, which notes how you can use the Unix commands `which` and `whereis` or the Windows command `where` to help locate the file.

Subsequent calls to `whereis pandoc` return the registered location, which is how `markstat` can find it.

Pandoc implements several extensions to Markdown; refer to John MacFarlane's (2017) *Pandoc User's Guide* for details. For example, the use of `\` to force a line break is a Pandoc extension.

Another extension of note is that Pandoc will use the image title or alt-text, as specified in square brackets, to generate a caption for the figure. This means that your Stata code for generating the graph should probably not contain a title. Alternatively, you may leave the alt-text blank or turn off captioning by ensuring that the image is not a separate paragraph, which you do by adding a backslash at the end of the line, as in `![alt-text](source)\`.

5 Syntax

The syntax of the `markstat` command is quite simple:

```
markstat using filename [, pdf mathjax strict]
```

The input file should have the extension `.stmd`, which is short for Stata Markdown, and as usual with Stata commands, it can be omitted. For example, the sample file is called `auto.stmd` in my system, and I ran it by typing `markstat using auto`.

If you just want to generate HTML and your document does not include mathematical equations, you do not need any of the options. Thus, I will provide only a brief summary here, leaving details to later sections. This also means that if you downloaded Pandoc and registered it with `whereis`, you are now ready to run `markstat`.

The `pdf` option is used to generate a PDF document, which is done by first generating L^AT_EX, so it requires additional tooling as explained in section 10.

The `mathjax` option is used to include inline and display math in a webpage using the MathJax JavaScript library; see section 7. The option is ignored for PDF output.

The `strict` option has to do with how we separate Markdown and Stata code. The “one tab or four spaces” rule is simple and supports clean documents, but it precludes some advanced Markdown options. The `strict` syntax uses code fences for maximum flexibility and is described in section 11.

The first thing the command does is tangle the file, extracting the Markdown and Stata blocks into separate files, which have the same name as the input file but with the extensions `.md` and `.do`, respectively.

The Markdown file has all Stata code removed, leaving placeholders of the form `{{n}}` for the n th code chunk, which is why you should not use double braces as part of your annotations. But then, who does?

The command will try to convert this file to HTML or \LaTeX using Pandoc, producing a file with the same name as the input but with the extension `.pdx`. This is a regular HTML or \LaTeX file, but it has a custom extension to distinguish it from the file that will incorporate Stata output later in the pipeline.

The Stata do-file has all annotations removed. Instead, it has comments of the form `//_n` to mark the start of the n th code chunk and `//_~` to mark the end of the last chunk, so please avoid this pattern in your own comments.

The next thing the command does is run this file through Stata. If something goes wrong, you will see the reason in the Results window. The output of this step is a log file in SMCL format, with the extension `.smcl`.

The command then weaves the Markdown and Stata output files, inserting the output in the appropriate places in the narrative as indicated by the placeholders. This produces a file with the same name as the input file but with the extension `.html` for HTML or `.tex` for \LaTeX .

If you are generating HTML, you are done. Generating a PDF document requires an extra step: running `pdflatex` to convert the \LaTeX file to PDF, which `markstat` does by running an external program and using a Stata \LaTeX package as described below.

Finally, `markstat` issues the Stata command `view browse` to show the final document in your default web browser or in Acrobat Reader.

6 Images

If your Stata program produced graphs and you generated HTML, the resulting file will not be self-contained because it will only have links to the images, which will reside in your computer's hard drive. If you were to email the file to a colleague, it would be missing the images.

The `bundle` command ([Rodríguez 2017a](#)), also available from the Statistical Software Components archive, provides a solution. This command takes as input the name of an HTML file and goes through the code. Each time it finds a link to an image in PNG format, it grabs the image file, encodes it as text using the same base-64 encoding as email attachments, and rewrites the image link to include the encoded image as uniform resource identifier data. By default, the output file has the same name as the input but with `-b` appended to indicate that it is a bundle; however, there is an option to specify a different name.

For example, to turn our fuel efficiency example into a self-contained webpage, we could use

```
bundle using auto
```

This will read `auto.html` and write `auto-b.html` with the image bundled in.

Another way to include images is to save the HTML file as PDF, which browsers such as Chrome will do for you. Yet another way is to read the HTML file into Word, which does a reasonably good job of parsing the code, and then save it as PDF. Still another way is to generate PDF instead of HTML, as explained in section 10 below—this method will embed the images automatically.

7 Inline and display math

Pandoc will take any text between dollar signs as a \LaTeX formula, so you may write a regression model as `$y = \alpha + \beta x + e$`. Exactly how the equation is rendered depends on the type of output you are generating and the options in effect.

If you are generating HTML, Pandoc will render the equation as well as possible using Unicode characters. This is often all you need for simple equations. A more general solution is to use MathJax, which is enabled by `markstat`'s `mathjax` option.

MathJax is a JavaScript library that can render \LaTeX formulas in an HTML page with excellent results. Pandoc will let you use single dollar signs for inline math and double dollar signs for display math, just as you would in a \LaTeX document, and will translate them to `\(` and `\)` for inline equations and `\[` and `\]` for display equations, which is what MathJax prefers.

Pandoc will also make sure that the HTML file includes a link to the MathJax script using their content distribution network. Visit MathJax.org for more information.

If you are generating PDF via \LaTeX , you can use single and double dollar signs too, and the inline and display math will be rendered natively by \LaTeX .

When typing inline math, ensure there is no space between the equation and the opening or closing dollar signs. For example, `$ y = \alpha + \beta x + e $` will not work. For display math, you can include the entire expression in one line by using double dollar signs, but you can also display it as

```
$$
    y = \alpha + \beta x + e
$$
```

which I think improves readability. I tend to indent the math in display equations, and of course I would not want it to be mistaken for Stata code under the “one tab or four spaces” rule, so `markstat` suspends that rule inside display math, provided that the double dollar signs are the only text in the opening and closing lines.

By the way, the code above renders in PDF as

$$y = \alpha + \beta x + e$$

Try generating HTML with and without the `mathjax` option to see what works for you.

8 Metadata

Pandoc has an option to include a document's title, author, and date as metadata. Simply begin the document with three lines that each start with a `%` symbol and contain the relevant information:

```
% Stata Markdown
% Your Name Here
% 26 October 2016
```

In L^AT_EX, this information will populate the title, author, and date macros before generating the title page. In HTML, it will appear both as metadata and as headings at levels 1, 2, and 3 at the start of the document.

To omit the title, author, or date, leave the line blank except for the `%`. If the title is too long, you may continue on extra lines, provided you start them with a space. Multiple authors may be listed separated by semicolons or on continuation lines. The date may be generated using inline code, as noted in [section 12](#).

Alternatively, you may use the YAML format to enter the metadata. See the *User's Guide* ([MacFarlane 2017](#)) for more information.

9 Custom styles

The `markstat` command comes with a cascading style sheet (CSS) file that contains styles to be used in HTML output. The file has rules for headings, text, and of course Stata input and output blocks. It also provides styles for Pandoc-generated items such as metadata, figure environments, and figure captions. The CSS file is called `markstat.css`, will be saved in the ado-path when the command is installed, and will be injected in the output when you generate HTML, so no external links are needed.

It is possible to customize the styles by using your own set of rules. All you have to do is define a CSS file and save it as `markstat.css` in the current directory, which is searched before the system directories. This setup also allows you to have a different style file for each project; you just use different folders, each with its own CSS file. The best way to get started is by editing the standard style.

All Stata input and output is rendered in HTML as preformatted text using a `<pre>` tag with class `stata`, with a light gray background and a border, both easily changed. The horizontal and vertical rules, corners, crossings, and T-junctions typical of Stata output are rendered using Unicode versions of the original IBM drawing characters. I get

best results specifying a Lucida Console font on Windows and just trusting the browser to pick a `monospace` font otherwise, with the `line-height` equal to the `font-size`. I recommend you keep these settings.

10 Generating PDF

The simplest way to generate PDF output is to first generate HTML and then have your browser save the file as PDF, or read the file into Word and save it as PDF, as noted at the end of section 6 in the context of bundling figures. This may be all you need.

For superior results, however, there is no substitute for first generating \LaTeX and then converting that to PDF, which is what the `pdf` option does. The good news is that you do not need to learn \LaTeX ; you can author your annotations in Markdown, which is much easier.

Unfortunately, this option requires additional tooling. You need to have access to a \LaTeX -to-PDF converter, which will usually be part of a \TeX installation such as MiKTeX on Windows, MacTeX on Mac OS X, or \TeX Live on Unix. If you are not a \LaTeX user, you will need to download one of these distributions.

You then use the `whereis` command introduced earlier to let `markstat` know where to find `pdflatex`, typing in Stata

```
whereis pdflatex full-path-to-pdflatex-executable
```

For example, on a Windows system, the path might be `c:\Program Files (x86)\MikTeX 2.9\mixtex\bin\pdflatex.exe`; on a Mac, it may be `/usr/local/texlive/2015/bin/x86_64-darwin/pdflatex`. Type `help whereis` for tips on locating the file.

You also need a Stata package used to render Stata logs in \LaTeX . The file is called `stata.sty` and is available from the *Stata Journal*. The `sjlatex` command will install all journal files, but we only need `stata.sty`, which can be downloaded from <http://www.stata-journal/production/sjlatex/stata.sty>. The file may be in the current directory, but it is more convenient to copy it to your local \TeX installation and then update the \TeX filename database so that the package is always available. Having access to a local \TeX guru may be invaluable at this stage.

Once these two tooling requirements have been satisfied, using the `pdf` option will cause `markstat` to tangle the input, run Pandoc to generate \LaTeX from the Markdown code, run the Stata do-file, ask Stata to convert the SMCL log to \TeX via the `log texman` command, weave the outputs into a single \LaTeX file, run `pdflatex`, and finally display the PDF file in Acrobat Reader via Stata's `view browse` command.

On some systems, `pdflatex` may not be able to write to the PDF file if it is open in Adobe Reader. The workaround is to close the reader, and then press *Enter* in the Converter window so that it can resume its work. Even better is to make a habit of

closing the PDF file before rerunning the `markstat` command. Other PDF viewers do not lock the file, but I prefer to follow Stata defaults.

If you are generating a PDF file, the images will have been embedded automatically. For best results, however, your `graph export` command should probably generate images in PDF rather than PNG format. PDF uses a vector format (essentially, instructions for drawing the image) and scales better than PNG, which is a raster format consisting basically of a matrix of pixels of different colors.

11 Strict code blocks

The decision to define a Stata block by indenting each line of code one tab or four spaces produces clean-looking input files that happen to be legal Markdown code.

There is, however, a small problem. The Common Markdown specification allows a list item to have more than one paragraph or to include nested lists, with the subsequent paragraphs or lists indented one tab or four spaces. As a result, our simple rule will mistake those lines for Stata commands. The workaround is simple: stick to simple lists, or read on for an alternative.

There is also an issue if you want to include verbatim blocks that are not intended to be run through Stata, but this problem can be solved by using code fences, lines with three or more backticks or tildes inserted before and after a block of code. The `markstat` parser will not treat fenced code as Stata commands, even if indented.

A more general solution is to use code fences for Stata blocks themselves, coding

```
```{s}
 // Stata commands here
```
```

This makes the block clear and unambiguous, with the `{s}` indicating that the code is to be run through Stata. It also allows multiparagraph list items and nested lists. But it does make the input file look a bit more cluttered (which is why, in the interest of readability, this is not the default setting).

The `strict` option of the `markstat` command turns on Stata code fences, with the option to omit the braces, so a Stata block can start with the line ````{s}` or just ````s` and end with the line `````. For example, the last part of our fuel efficiency example could be coded in strict mode as follows:

```
The regression equation estimated by ordinary least squares is

```s
 regress gphm weight
```
```

```
Thus, a car that weighs 1,000 pounds more than another requires
on average an extra 1.4 gallons to travel 100 miles.
```

When this option is in effect, indented blocks without Stata code fences will be treated as Markdown rather than Stata code, and therefore will be passed on to Pandoc for processing.

Code inside Stata fences may be indented to improve readability, as I did in the above example, and `markstat` will remove one level of indentation (if present) when generating the do-file. Pandoc requires that fenced code blocks be separated from surrounding text by blank lines, but `markstat` makes those optional for Stata code blocks.

Using strict code blocks also allows you to turn off echoing the Stata commands in a code chunk, which you do by coding the opening fence as ````{s/}` or just ````s/`. Examples are provided in sections 13 and 14.

This option may seem to run against the aim of full reproducibility of results, but it may be desirable when generating dynamic reports, where the commands themselves are of secondary interest and may safely be relegated to the `.stmd` file (which as noted in the introduction remains as a complete reproducible record of how everything was done).

There is no chunk option for suppressing Stata output because this can always be achieved using the `quietly` prefix. I imagine one might combine suppressing both input and output and running a script only for its side effects, which brings us to the next topic.

12 Inline code

Sometimes your annotations need to quote results. For example, after running a regression, you may want to quote the value of R^2 . You could, of course, type something like, “The proportion of variance explained or R^2 can be read from the output as 0.0077 or less than one percent.”

But that risks transcription errors. We know that Stata stores R^2 as `e(r2)`, and it would be nice to access the stored result. One can always add `display e(r2)` to a code block, but the result would not be spliced with the text.

Enter inline code, which lets you quote results using an optional format and an expression with the following syntax

```
`s [fmt] expression`
```

The code will extract the optional format and expression, run it through Stata using a `display` command, and then splice the output inline with the text.

For example, we could say `R-squared is `s e(r2)``, but you may not want to display R^2 to eight decimal places, so try `R-squared is `s %5.3f e(r2)`` instead.

This feature is intended for short text. Inline code should not span multiple lines, but a line of Markdown text may include multiple inline expressions. The `markstat` command will retrieve just one line of output per expression.

Here is an example quoting an estimated coefficient dynamically:

Let us regress gallons per 100 miles on weight

```
regress gphm weight
```

A car that weighs 1,000 pounds more than another will use on average an extra `s %5.2f 1000*_b[weight]` gallons to travel 100 miles.

The output from `markstat` with the `pdf` option will render as follows:

Let us regress gallons per 100 miles on weight

```
. regress gphm weight
```

| Source | SS | df | MS | Number of obs | = | 74 |
|----------|------------|----|------------|---------------|---|--------|
| Model | 87.2964969 | 1 | 87.2964969 | F(1, 72) | = | 194.71 |
| Residual | 32.2797639 | 72 | .448330054 | Prob > F | = | 0.0000 |
| Total | 119.576261 | 73 | 1.63803097 | R-squared | = | 0.7300 |
| | | | | Adj R-squared | = | 0.7263 |
| | | | | Root MSE | = | .66957 |

| gphm | Coef. | Std. Err. | t | P> t | [95% Conf. Interval] | |
|--------|----------|-----------|-------|-------|----------------------|----------|
| weight | .001407 | .0001008 | 13.95 | 0.000 | .001206 | .0016081 |
| _cons | .7707669 | .3142571 | 2.45 | 0.017 | .1443069 | 1.397227 |

A car that weighs 1,000 pounds more than another will use on average an extra 1.41 gallons to travel 100 miles.

It is possible to style the output of inline expressions as code by using double backticks. For example, in the fuel efficiency data we could state that the variance was estimated using the ``s e(vce)`` method, which in this case would render as “the `ols` method”, with `ols` in a monospace font.

Inline code may be inserted anywhere in Markdown, including the metadata. For example, the date line may read % `s c(current_date)` to insert the current date as provided by Stata’s `c-class`.

Finally, inline code may include macro evaluations or compound quotes. Just keep in mind that Stata macros use an opening backtick and a closing single quote, whereas inline code uses opening and closing backticks, which is how the parser can distinguish them. We will see an example in the next section.

13 Markdown tables

On occasion, your narrative may need to include a table of results. Markdown does not have a syntax for tables, relying on HTML markup instead, but Pandoc provides a simple syntax extension, best described through an example.

Here is code for a table showing average fuel efficiency in gallons per 100 miles for foreign and domestic cars, before and after adjusting for weight.

| Car type | Unadjusted | Adjusted |
|----------|------------|----------|
| Foreign | 4.31 | 5.46 |
| Domestic | 5.32 | 4.83 |

Basically, you line up the columns yourself. Text alignment is determined by the position of the header relative to the “underlining” below it. Our first column is left-aligned, and the other two are right-aligned.

While pleasantly simple, this syntax will not work if we have inline code, because the expressions, their placeholders, and the final output may all have different widths. Fortunately, Pandoc has an alternative syntax, pipe tables, where columns are separated by the pipe character (|) and alignment is indicated by the placing of a colon in the header underlining. The previous example would look as follows:

| Car type | Unadjusted | Adjusted |
|----------|------------|----------|
| :----- | :----- | :----- |
| Foreign | 4.31 | 5.46 |
| Domestic | 5.32 | 4.83 |

Now, we can make the table truly dynamic. We regress gallons per 100 miles on the indicator of foreign cars and store the coefficients in a matrix. We then compute the mean weight and store it for later use. Finally, we add weight to the regression model. To keep the code short, I stored the baseline prediction (domestic cars of average weight) in a scalar. Because we want to display all results to just two decimal places, we store a common format in a macro. This is also a good candidate for hiding all commands.

```

```s/
 quietly reg gphm foreign
 mat b = e(b)
 quietly sum weight
 scalar mw = r(mean)
 quietly reg gphm weight foreign
 scalar dom = _b[_cons] + _b[weight] * mw
 local f %6.2f
...

```

We are then ready to layout the table using inline code, as shown below. I lined up the pipe characters to improve readability, but that is not required, and in any case it would no longer hold after `markstat` splices the actual results.

Car type	Unadjusted	Adjusted
:-----	:-----	:-----
Foreign	`s `f` b[1,1]+b[1,2]`	`s `f` dom + _b[foreign]`
Domestic	`s `f` b[1,2]`	`s `f` dom`

This code with the `pdf` and `strict` options renders the following table:

Car type	Unadjusted	Adjusted
Foreign	4.31	5.46
Domestic	5.32	4.83

Foreign cars use less fuel than domestic cars but are also lighter. When we compare cars with the same weight, the imports use about six-tenths of a gallon more per 100 miles than comparable domestic cars.

## 14 Tables of estimates

I mentioned in the introduction commands aimed at producing publication-quality tables, some of which have options to export results to L<sup>A</sup>T<sub>E</sub>X, Word, or Excel. As long as they also produce standard Stata output, however, they can be used with `markstat`.

I will illustrate this possibility using Jann's (2007) `esttab`, a nice wrapper for `estout` that works with `eststo` to store equation results. The following Stata Markdown script fits two models to the fuel efficiency data and compares them side by side. We use the strict syntax and suppress command echoing to show what a dynamic summary report might look like:

The table below shows estimated differences in fuel efficiency between foreign and domestic cars with and without adjustment for weight, using gallons per 100 miles as the outcome.

```

```s/
    eststo clear
    quietly eststo: regress gphm foreign
    quietly eststo: regress gphm foreign weight
    esttab
...

```

We see that on average foreign cars are more economical, but if we adjust for weight they are less fuel efficient, using `%3.1f _b[foreign]` gallons **more** instead of one gallon **less** per 100 miles.

Running this code with the `pdf` and `strict` options produces the following output:

The table below shows estimated differences in fuel efficiency between foreign and domestic cars with and without adjustment for weight, using gallons per 100 miles as the outcome.

	(1) gphm	(2) gphm
foreign	-1.005** (-3.29)	0.622** (3.11)
weight		0.00163*** (13.74)
_cons	5.318*** (31.92)	-0.0735 (-0.18)
N	74	74

t statistics in parentheses

* p<0.05, ** p<0.01, *** p<0.001

We see that on average foreign cars are more economical, but if we adjust for weight they are less fuel efficient, using 0.6 gallons *more* instead of one gallon *less* per 100 miles.

The `estout` command can also produce HTML and \LaTeX tables, as can `tabout` (Watson 2016). It is possible to include these tables in the output as long as they are in the target language, and I provide examples online.

15 Conclusion

Rising (2016) has a nice review of current tools for producing dynamic documents in Stata. I believe `markstat` fills all the requirements he mentions for teaching and research—such as including or hiding commands or results, inserting graphs, and quoting results in the narrative—and has an important advantage over other tools in the simplicity of the single-file input script.

In fact, the overriding concern in the design of the `markstat` command has been simplicity. I wanted the input file to be easy to write and, just as importantly, easy to read, much in the spirit of Markdown itself, with minimal intrusion from the need to distinguish Stata and Markdown code.

I rely on a simple “one tab or four spaces” indentation rule to produce clean input, but allow fenced blocks for maximum flexibility, as well as inline code for quoting results. All the inline or block code is plain Stata, without the need for special commands, and everything outside those elements is plain Markdown.

I modeled the output on Stata's own documentation and this journal. The task was made easier, at least when generating PDF output, by using the same L^AT_EX style. The HTML output tries to live up to that standard by taking advantage of Unicode to render horizontal and vertical rules using the original IBM drawing characters, which are available in modern monospace fonts.

To facilitate troubleshooting, I make minimal use of temporary files, keeping all important pieces around. As noted earlier, the tangle step generates a standard Stata do-file, and if something goes wrong there, you will soon see the cause in the Results window.

The command also generates a standard Markdown file, but if something goes wrong with Pandoc, it may be harder to detect the problem because the shell will have closed. My advice here is to run Pandoc from a terminal or Command window. Producing a PDF is harder because it requires L^AT_EX, and my troubleshooting advice again is to run `pdflatex` directly on a console to see what went wrong.

I have assumed that the user will be writing Stata code and Markdown annotations at the same time, but as a reviewer noted, it is also possible to convert existing do-files into Stata Markdown scripts, indenting the code and rewriting or expanding the comments using Markdown syntax.

The Stata Markdown section of my website has installation tips and a growing collection of examples. It also includes answers to frequently asked questions. See <http://data.princeton.edu/stata/markdown>.

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17 References

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