

The sTeX3 Manual *

Michael Kohlhase, Dennis Müller
FAU Erlangen-Nürnberg
<http://kwarc.info/>

2022-02-15

Abstract

sTeX is a collection of L^AT_EX package that allow to markup documents semantically without leaving the document format, essentially turning L^AT_EX into a document format for mathematical knowledge management (MKM). sTeX augments L^AT_EX with

- *Semantic macros* that denote and distinguish between mathematical concepts, operators, etc. independent of their notational presentation,
- A powerful *module system* that allows for authoring and importing individual fragments containing document text and/or semantic macros, independent of – and without hard coding – directory paths relative to the current document,
- A mechanism for exporting sTeX documents to (modular) XHTML, preserving all the semantic information for semantically informed knowledge management services.

This is the user manual for the sTeX package and associated software. It is primarily directed at end-users who want to use sTeX to author semantically enriched documents. For the full documentation, see [the sTeX documentation](#)

*Version 3.0 (last revised 2022-02-15)

Contents

Chapter 1

What is sTeX?

Formal systems for mathematics (such as interactive theorem provers) have the potential to significantly increase both the accessibility of published knowledge, as well as the confidence in its veracity, by rendering the precise semantics of statements machine actionable. This allows for a plurality of added-value services, from semantic search up to verification and automated theorem proving. Unfortunately, their usefulness is hidden behind severe barriers to accessibility; primarily related to their surface languages reminiscent of programming languages and very unlike informal standards of presentation.

sTeX minimizes this gap between informal and formal mathematics by integrating formal methods into established and widespread authoring workflows, primarily L^AT_EX, via non-intrusive semantic annotations of arbitrary informal document fragments. That way formal knowledge management services become available for informal documents, accessible via an IDE for authors and via generated *active* documents for readers, while remaining fully compatible with existing authoring workflows and publishing systems.

Additionally, an extensible library of reusable document fragments is being developed, that serve as reference targets for global disambiguation, intermediaries for content exchange between systems and other services.

Every component of the system is designed modularly and extensibly, and thus lay the groundwork for a potential full integration of interactive theorem proving systems into established informal document authoring workflows.

The general sTeX workflow combines functionalities provided by several pieces of software:

- The sTeX package to use semantic annotations in L^AT_EX documents,
- RuSTeX to convert `tex` sources to (semantically enriched) `xhtml`,
- The MMT software, that extracts semantic information from the thus generated `xhtml` and provides semantically informed added value services.

Chapter 2

Quickstart

2.1 Setup

2.1.1 The sTeX IDE

TODO: VSCode Plugin

2.1.2 Manual Setup

Foregoing on the sTeX IDE, we will need several pieces of software; namely:

- **The sTeX-Package** available [here](#)¹. Note, that the CTAN repository for L^AT_EX packages may contain outdated versions of the sTeX package, so make sure, that your TEXMF system variable is configured such that the packages available in the linked repository are prioritized over potential default packages that come with your T_EX distribution.

- **The Mmt System** available [here](#)². We recommend following the setup routine documented [here](#).

Following the setup routine (Step 3) will entail designating a **MathHub**-directory on your local file system, where the MMT system will look for sTeX/MMT content archives.

- To make sure that sTeX too knows where to find its archives, we need to set a global system variable **MATHHUB**, that points to your local **MathHub**-directory (see [chapter 4](#)).

- **sTeX Archives** If we only care about L^AT_EX and generating pdfs, we do not technically need MMT at all; however, we still need the MATHHUB system variable to be set. Furthermore, MMT can make downloading content archives we might want to use significantly easier, since it makes sure that all dependencies of (often highly interrelated) sTeX archives are cloned as well.

Once set up, we can run **mmt** in a shell and download an archive along with all of its dependencies like this: `lmh install <name-of-repository>`, or a whole *group* of archives; for example, `lmh install smglom` will download all smglom archives.

¹EdNOTE: For now, we require the latex3-branch

²EdNOTE: For now, we require the sTeX-branch, requiring manually compiling the MMT sources

- **R_US_TE_X** The MMT system will also set up R_US_TE_X for you, which is used to generate (semantically annotated) `xhtml` from `tex` sources. In lieu of using MMT, you can also download and use R_US_TE_X directly [here](#).

2.2 A First $\text{\texttt{sTeX}}$ Document

Having set everything up, we can write a first $\text{\texttt{sTeX}}$ document. As an example, we will use the `smglom/calculus` and `smglom/arithmetics` archives, which should be present in the designated MathHub-folder.

The document we will consider is the following:

```
\documentclass{article}
\usepackage{stex}
\usepackage{xcolor}
\def\compemph#1{\textcolor{blue}{#1}}

\begin{document}
\usemodule[smglom/calculus]{series}
\usemodule[smglom/arithmetics]{realarith}

The \symref{series}{series}  $\sum_{n=1}^{\infty} \frac{1}{2^n}$ 
\realdivide[\frac]{1}{2}
\realpower{2}{n}
\symref{converges}{converges} towards 1$.
\end{document}
```

Compiling this document with `pdflatex` should yield the output

The **series** $\sum_{n=1}^{\infty} \frac{1}{2^n}$ **converges** towards 1.

Note that the \sum and ∞ -symbols are highlighted in blue, and the words “series” and “converges” in bold. This signifies that these words and symbols reference $\text{\texttt{sTeX}}$ *symbols* formally declared somewhere; associating their *presentation* in the document with their (formal) definition - i.e. their semantics. The precise way in which they are highlighted (if at all) can of course be customized (see ³).

\usemodule

The command `\usemodule[some/archive]{modulename}` finds some module in the appropriate archive – in the first case (`\usemodule[smglom/calculus]{series}`), $\text{\texttt{sTeX}}$ looks for the archive `smglom/calculus` in our local MathHub-directory (see [chapter 4](#)), and in its source-folder for a file `series.tex`. Since no such file exists, and by default the document is assumed to be in *english*, it picks the file `series.en.tex`, and indeed, in here we find a statement `\begin{smodule}{series}`.

$\text{\texttt{sTeX}}$ now reads this file and makes all semantic macros therein available to use, along with all its dependencies. This enables the usage of `\infinitiesum` later on.

Analogously, `\usemodule[smglom/arithmetics]{realarith}` opens the file `realarith.en.tex` in the `.../smglom/arithmetics/source-folder` and makes its contents available, e.g. `\realdivide` and `\realpower`.

³EdNOTE: somewhere later

`\symref`
`\symname`

The command `\symref{symbolname}{text}` marks the `text` in the second argument as representing the `symbolname` in the first argument – which is why the word “series” is set in boldface. In the pdf, this is all that happens. In the `xhtml` (which we will investigate shortly) however, we will note that the word “series” is now annotated with the full URI of the symbol denoting the *mathematical concept of a series*. In other words, the word is associated with an unambiguous semantics.

Notably, in both cases above (*series* and *converges*) the text that *references* the symbol and the name of the symbol are identical. Since this occurs quite often, the shorthand `\symname{converges}` would have worked as well, where `\symname{foo-bar}` behaves exactly like `\symref{foo-bar}{foo bar}` - i.e. the text is simply the name of the symbol with “-” replaced by a space.

`\importmodule`

If you investigated the contents of the imported modules (`realarith` and `series`) more closely, you’ll note that none of them contain a symbol “converges”. Yet, we can use `\symref` to refer to “converges”. That is because the symbol `converges` is found in `smglom/calculus/source/sequenceConvergence.en.tex`, and `series.en.tex` contains the line `\importmodule{sequenceConvergence}`. The `\importmodule`-statement makes the module referenced available to all documents that include the current module. As such, a “current module” has to exist for `\importmodule` to work, which is why the command is only allowed within a `module-environment`.

TODO explain `xhtml` conversion, MMT compilation (requires an archive...?).

Chapter 3

Using Semantic Macros

TODO

Chapter 4

TeX Archives

4.1 The Local MathHub-Directory

`\usemodule`, `\importmodule`, `\inputref` etc. allow for including content modularly without having to specify absolute paths, which would differ between users and machines. Instead, TeX uses *archives* that determine the global namespaces for symbols and statements and make it possible for TeX to find content referenced via such URIs.

All TeX archives need to exist in the local MathHub-directory. TeX knows where this folder is via one of three means:

1. If the TeX package is loaded with the option `mathhub=/path/to/mathhub`, then TeX will consider `/path/to/mathhub` as the local MathHub-directory.
2. If the `mathhub` package option is *not* set, but the macro `\mathhub` exists when the TeX-package is loaded, then this macro is assumed to point to the local MathHub-directory; i.e. `\def\mathhub{/path/to/mathhub}\usepackage{stex}` will set the MathHub-directory as `path/to/mathhub`.
3. Otherwise, TeX will attempt to retrieve the system variable `MATHHUB`, assuming it will point to the local MathHub-directory. Since this variant needs setting up only *once* and is machine-specific (rather than defined in tex code), it is compatible with collaborating and sharing tex content, and hence recommended.

4.2 The Structure of TeX Archives

An TeX archive `group/name` needs to be stored in the directory `/path/to/mathhub/group/name`; e.g. assuming your local MathHub-directory is set as `/user/foo/MathHub`, then in order for the `smglom/calculus`-archive to be found by the TeX system, it needs to be in `/user/foo/MathHub/smglom/calculus`.

Each such archive needs two subdirectories:

- `/source` – this is where all your tex files go.
- `/META-INF` – a directory containing a single file `MANIFEST.MF`, the content of which we will consider shortly

An additional `lib`-directory is optional, and is where \TeX will look for files included via `\libinput`.

Additionally a *group* of archives `group/name` may have an additional archive `group/meta-inf`. If this `meta-inf`-archive has a `/lib`-subdirectory, it too will be searched by `\libinput` from all tex files in any archive in the `group/*-group`.

4.3 MANIFEST.MF-Files

The `MANIFEST.MF` in the `META-INF`-directory consists of key-value-pairs, instructing \TeX (and associated software) of various properties of an archive. For example, the `MANIFEST.MF` of the `smglom/calculus`-archive looks like this:

```
id: smglom/calculus
source-base: http://mathhub.info/smglob/calculus
narration-base: http://mathhub.info/smglob/calculus
dependencies: smglom/arithmetic,smglom/sets,smglom/topology,
              smglom/mv,smglom/linear-algebra,smglom/algebra
responsible: Michael.Kohlhase@FAU.de
title: Elementary Calculus
teaser: Terminology for the mathematical study of change.
description: desc.html
```

Many of these are in fact ignored by \TeX , but some are important:

`id`: The name of the archive, including its group (e.g. `smglom/calculus`),

`source-base` or

`ns`: The namespace from which all symbol and module URIs in this repository are formed, see (TODO),

`narration-base`: The namespace from which all document URIs in this repository are formed, see (TODO),

`url`: The URL that is formed as a basis for *external references*, see (TODO),

`dependencies`: All archives that this archive depends on. \TeX ignores this field, but MMT can pick up on them to resolve dependencies, e.g. for `lmh install`.

Chapter 5

Creating New Modules and Symbols

TODO

Example 1

```
\begin{smodule}{assoctest}
\symdef[ args=1 a ]{foo}{\comp{a:}#1\comp{; b:}#2\comp{; c:}#3}{\comp[#1\comp{;}# #1\comp{##2\comp{;#2\comp{}}}
$ \foo {w_1}{w_2}{x,y,z}$
\end{smodule}
```

Module 1: $a : w_1; b : w_2; c : [w_1; x + [w_1; y + z; w_2]; w_2]$

5.1 Advanced Structuring Mechanisms

Given modules:

Example 2

```
\begin{smodule}{magma}
\symdef{universe}{\comp{\mathcal U}}
\symdef[ args=2, op=\circ ]{operation}{#1 \comp{\circ} #2}
\end{smodule}
\begin{smodule}{monoid}
\importmodule{magma}
\symdef{unit}{\comp{e}}
\end{smodule}
\begin{smodule}{group}
\importmodule{monoid}
\symdef[ args=1 ]{inverse}{\comp{-1}}
\end{smodule}
```

Module 2:
Module 3:
Module 4:

We can form a module for *rings* by “cloning” an instance of `group` (for addition) and `monoid` (for multiplication), respectively, and “glueing them together” to ensure they share the same universe:

Example 3

```
\begin{smodule}{ring}
\begin{copymodule}{group}{addition}
\renamedcl[name=universe]{universe}{runiverse}
\renamedcl[name=plus]{operation}{rplus}
\renamedcl[name=zero]{unit}{rzero}
\renamedcl[name=uminus]{inverse}{rminus}
\end{copymodule}
\notation[plus,op=+,prec=60]{rplus}{#1 \comp+ #2}
\notation[zero]{rzero}{\comp0}
\notation[uminus,op=-]{rminus}{\comp- #1}
\begin{copymodule}{monoid}{multiplication}
\assign{universe}{\runiverse}
\renamedcl[name=times]{operation}{rtimes}
\renamedcl[name=one]{unit}{rone}
\end{copymodule}
\notation[cdot,op=\cdot,prec=50]{rtimes}{#1 \comp\cdot #2}
\notation[one]{rone}{\comp1}

Test: $\rtimes a{\rplus c{\rtimes de}}$
\end{smodule}
```

Module 5:
Test: $a \cdot (c + d \cdot e)$

TODO: explain donotclone

Example 4

```
\begin{smodule}{int}
\symdef{Integers}{\comp{\mathbb Z}}
\symdef[args=2,op=+]{plus}{#1 \comp+ #2}
\symdef[zero]{\comp0}
\symdef[args=1,op=-]{uminus}{\comp-#1}

\begin{interpretmodule}{group}{intisgroup}
\assign{universe}{\Integers}
\assign{operation}{\plus!}
\assign{unit}{\zero}
\assign{inverse}{\uminus!}
\end{interpretmodule}
\end{smodule}
```

Module 6:

5.2 Primitive Symbols (The sTeX Metatheory)

Chapter 6

TeX Statements (Definitions, Theorems, Examples, ...)

Chapter 7

Additional Packages

7.1 Modular Document Structuring

7.2 Slides and Course Notes

7.3 Homework, Problems and Exams

Chapter 8

Stuff

8.1 Modules

`\sTeX` Both print this \TeX logo.
`\stex`

8.1.1 Semantic Macros and Notations

Semantic macros invoke a formally declared symbol.

To declare a symbol (in a module), we use `\symdecl`, which takes as argument the name of the corresponding semantic macro, e.g. `\symdecl{foo}` introduces the macro `\foo`. Additionally, `\symdecl` takes several options, the most important one being its arity. `foo` as declared above yields a *constant* symbol. To introduce an *operator* which takes arguments, we have to specify which arguments it takes.

Module 7: For example, to introduce binary multiplication, we can do `\symdecl[args=2]{mult}`. We can then supply the semantic macro with arbitrarily many notations, such as `\notation{mult}{#1 #2}`.

Example 5

```
\symdecl[args=2]{mult}
\notation{mult}{#1 #2}
 $\mult{a}{b}$ 
```

ab

Since usually, a freshly introduced symbol also comes with a notation from the start, the `\symdef` command combines `\symdecl` and `\notation`. So instead of the above, we could have also written

```
\symdef[args=2]{mult}{#1 #2}
```

Adding more notations like `\notation[cdot]{mult}{#1 \comp{\cdot} #2}` or `\notation[times]{mult}{#1 \comp{\times} #2}` allows us to write $\mult[cdot]{a}{b}$ and $\mult[times]{a}{b}$:

Example 6

```
\notation[cdot]{mult}{#1 \comp{\cdot} #2}
\notation[times]{mult}{#1 \comp{\times} #2}
 $\mult[cdot]{a}{b}$  and  $\mult[times]{a}{b}$ 
```

$a \cdot b$ and $a \times b$

.

Not using an explicit option with a semantic macro yields the first declared notation, unless changed⁴.

Outside of math mode, or by using the starred variant `\foo*`, allows to provide a custom notation, where notational (or textual) components can be given explicitly in square brackets.

Example 7

```
 $\mult*{a}[\comp{\ast}]{b}$  is the
\mult[\comp{product of}][ $a$ ][ $b$ ]
```

$a * b$ is the product of a and b

.

In custom mode, prefixing an argument with a star will not print that argument, but still export it to OMDoc:

Example 8

```
\mult[\comp{Multiplying}]* $\mult{a}{b}$ [ again by  $b$  yields ...]
```

Multiplying again by b yields...

The syntax `*[int]` allows switching the order of arguments. For example, given a 2-ary semantic macro `\forevery` with exemplary notation `\forall #1. #2`, we can write

Example 9

```
\symdecl[ args=2]{forevery}
\forevery* [2]{The proposition  $P$ }[ $\comp{holds for every}$ ][1]{ $x \in A$ }
```

The proposition P holds for every $x \in A$

⁴EdNOTE: TODO

representing the argument types – e.g. instead of writing `args=2`, we can equivalently write `args=ii`, indicating that the macro takes two i-type arguments.

Besides i-type arguments, \TeX has two other types, which we will discuss now.

The first are *binding* (b-type) arguments, representing variables that are *bound* by the operator. This is the case for example in the above `\forevery`-macro: The first argument is not actually an argument that the `forevery` “function” is “applied” to; rather, the first argument is a new variable (e.g. x) that is *bound* in the subsequent argument. More accurately, the macro should therefore have been implemented thusly:

```
\symdef[args=bi]{forevery}{\forall #1.\; #2}
```

Module 8: b-type arguments are indistinguishable from i-type arguments within \TeX , but are treated very differently in OMDoc and by MMT. More interesting *within* \TeX are a-type arguments, which represent (associative) arguments of flexible arity, which are provided as comma-separated lists. This allows e.g. better representing the `\mult`-macro above:

Example 12

```
\symdef[ args=a]{mult}{#1}{##1 \comp\cdot ##2}
$\mult{a,b,c,{d^e},f}$
```

$$a \cdot b \cdot c \cdot d^e \cdot f$$

As the example above shows, notations get a little more complicated for associative arguments. For every a-type argument, the `\notation`-macro takes an additional argument that declares how individual entries in an a-type argument list are aggregated. The first notation argument then describes how the aggregated expression is combined into the full representation.

For a more interesting example, consider a flexary operator for ordered sequences in ordered set, that taking arguments $\{a, b, c\}$ and `\mathbb{R}` prints $a \leq b \leq c \in \mathbb{R}$. This operator takes two arguments (an a-type argument and an i-type argument), aggregates the individuals of the associative argument using `\leq`, and combines the result with `\in` and the second argument thusly:

Example 13

```
\symdef[ args=ai]{numseq}{#1 \comp\in ##2}{##1 \comp\leq ##2}
$\numseq{a,b,c}{\mathbb{R}}$
```

$$a \leq b \leq c \in \mathbb{R}$$

Finally, B-type arguments combine the functionalities of a and b, i.e. they represent flexary binding operator arguments.

5 6

⁵EDNOTE: what about e.g. `\int \int \int f dx dy dz`?

⁶EDNOTE: “decompose” a-type arguments into fixed-arity operators?

Precedences

Every notation has an (upwards) *operator precedence* and for each argument a (downwards) *argument precedence* used for automated bracketing. For example, a notation for a binary operator `\foo` could be declared like this:

```
\notation[prec=200;500x600]{foo}{#1 \comp{+} #2}
```

assigning an operator precedence of 200, an argument precedence of 500 for the first argument, and an argument precedence of 600 for the second argument.

\TeX insert brackets thusly: Upon encountering a semantic macro (such as `\foo`), its operator precedence (e.g. 200) is compared to the current downwards precedence (initially `\neginfprec`). If the operator precedence is *larger* than the current downwards precedence, parentheses are inserted around the semantic macro.

Notations for symbols of arity 0 have a default precedence of `\infprec`, i.e. by default, parentheses are never inserted around constants. Notations for symbols with arity > 0 have a default operator precedence of 0. If no argument precedences are explicitly provided, then by default they are equal to the operator precedence.

Consequently, if some operator A should bind stronger than some operator B , then A ’s operator precedence should be smaller than B ’s argument precedences.

For example:

Module 9:

Example 14

```
\notation[prec=100]{plus}{#1 \comp{+} #2}
\notation[prec=50]{times}{#1 \comp{\cdot} #2}
 $\plus{a}{\times{b}{c}}$  and  $\times{a}{\plus{b}{c}}$ 
```

$a + b \cdot c$ and $a \cdot (b + c)$

8.1.2 Archives and Imports

Namespaces

Ideally, \TeX would use arbitrary URIs for modules, with no forced relationships between the *logical* namespace of a module and the *physical* location of the file declaring the module – like MMT does things.

Unfortunately, \TeX only provides very restricted access to the file system, so we are forced to generate namespaces systematically in such a way that they reflect the physical location of the associated files, so that \TeX can resolve them accordingly. Largely, users need not concern themselves with namespaces at all, but for completeness sake, we describe how they are constructed:

- If `\begin{module}{Foo}` occurs in a file `/path/to/file/Foo[.<lang>].tex` which does not belong to an archive, the namespace is `file://path/to/file`.
- If the same statement occurs in a file `/path/to/file/bar[.<lang>].tex`, the namespace is `file://path/to/file/bar`.

In other words: outside of archives, the namespace corresponds to the file URI with the filename dropped iff it is equal to the module name, and ignoring the (optional) language suffix¹.

If the current file is in an archive, the procedure is the same except that the initial segment of the file path up to the archive's `source`-folder is replaced by the archive's namespace URI.

Paths in Import-Statements

Conversely, here is how namespaces/URIs and file paths are computed in import statements, exemplary `\importmodule`:

- `\importmodule{Foo}` outside of an archive refers to module `Foo` in the current namespace. Consequently, `Foo` must have been declared earlier in the same document or, if not, in a file `Foo[.<lang>].tex` in the same directory.
- The same statement *within* an archive refers to either the module `Foo` declared earlier in the same document, or otherwise to the module `Foo` in the archive's top-level namespace. In the latter case, it has to be declared in a file `Foo[.<lang>].tex` directly in the archive's `source`-folder.
- Similarly, in `\importmodule{some/path?Foo}` the path `some/path` refers to either the sub-directory and relative namespace path of the current directory and namespace outside of an archive, or relative to the current archive's top-level namespace and `source`-folder, respectively.

The module `Foo` must either be declared in the file `<top-directory>/some/path/Foo[.<lang>].tex`, or in `<top-directory>/some/path[.<lang>].tex` (which are checked in that order).

- Similarly, `\importmodule[Some/Archive]{some/path?Foo}` is resolved like the previous cases, but relative to the archive `Some/Archive` in the mathhub-directory.
- Finally, `\importmodule{full://uri?Foo}` naturally refers to the module `Foo` in the namespace `full://uri`. Since the file this module is declared in can not be determined directly from the URI, the module must be in memory already, e.g. by being referenced earlier in the same document.

Since this is less compatible with a modular development, using full URIs directly is discouraged.

¹which is internally attached to the module name instead, but a user need not worry about that.