Semantic Markup for Mathematical Statements*

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Abstract

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

This package provides semantic markup facilities for mathematical statements like Theorems, Lemmata, Axioms, Definitions, etc. in $\LaTeX$ files. This structure can be used by MKM systems for added-value services, either directly from the $\LaTeX$ sources, or after translation.

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1 Introduction

The motivation for the *statements* package is very similar to that for semantic macros in the *modules* package: We want to annotate the structural semantic properties of statements in the source, but present them as usual in the formatted documents. In contrast to the case for mathematical objects, the repertoire of mathematical statements and their structure is more or less fixed.

This structure can be used by MKM systems for added-value services, either directly from the sTeX sources, or after translation. Even though it is part of the sTeX collection, it can be used independently, like its sister package sproofs.

sTeX \cite{Koh08} is a version of \TeX/La\TeX that allows to markup \TeX/La\TeX documents semantically without leaving the document format, essentially turning \TeX/La\TeX into a document format for mathematical knowledge management (MKM). Currently the OMDoc format \cite{Koh06} is directly supported.

2 The User Interface

The *statements* package supplies a semantically oriented infrastructure for marking up mathematical statements: fragments of natural language that state properties of mathematical objects, e.g. axioms, definitions, or theorems. The *statement* package provides an infrastructure for marking up the semantic relations between statements for the OMDoc transformation and uses the *ntheorem* package \cite{MS} for formatting (i.e. transformation to PDF).

2.1 Package Options

**defindex**

The *statements* package provides the *defindex* option to sTeX. If this is set, then definienda are automatically passed into the index of the document. Furthermore, the *statements* package passes the *showmeta* to the *metakeys* package. If this is set, then the metadata keys are shown (see \cite{Koh16a} for details and customization options). The *nontheorem* option tells statements not to load the *ntheorem* package – in case some other theorem package is already loaded; e.g. by the *beamer* package and we prefer that. Note that using the *nontheorem* option in a case where no theorem package is loaded will lead to errors.

2.2 Statements

All the statements are marked up as environments, that take a KeyVal argument that allows to annotate semantic information. Generally, we distinguish two forms of statements:

**block statements** have explicit discourse markers that delimit their content in the surrounding text, e.g. the boldface word “Theorem:” as a start marker and a little line-end box as an end marker of a proof.
flow statements do not have explicit markers, they are interspersed with the surrounding text.

Since they have the same semantic status, they must both be marked up, but styled differently. We distinguish between these two presentational forms with the display key, which is allowed on all statement environments. If it has the value block (the default), then the statement will be presented in a paragraph of its own, have explicit discourse markers for its begin and end, possibly numbering, etc. If it has the value flow, then no extra presentation will be added the semantic information is invisible to the reader. Another key that is present on all statement environments in the id key it allows to identify the statement with a name and to reference it with the semantic referencing infrastructure provided by the sref package [Koh16c].

2.2.1 Axioms and Assertions

The assertion environment is used for marking up statements that can be justified from previously existing knowledge (usually marked with the monikers “Theorem”, “Lemma”, “Proposition”, etc. in mathematical vernacular). The environment assertion is used for all of them, and the particular subtype of assertion is given in the type key. So instead of \begin{Lemma} we have to write \begin{assertion}[type=lemma] (see Example 1 for an example).

\begin{assertion}[id=sum-over-odds,type=lemma]
\sum_{i=1}^{n}{2i-1}=n^2
\end{assertion}

will lead to the result

**Lemma 2.1** \[ \sum_{i=1}^{n}{2i-1}=n^2 \]

Example 1: Semantic Markup for a Lemma in a module context

Whether we will see the keyword “Lemma” will depend on the value of the optional display key. In all of the assertion environments, the presentation expectation is that the text will be presented in italic font. The presentation (keywords, spacing, and numbering) of the assertion environment is delegated to a theorem styles from the ntheorem environment. For an assertion of type \langle type \rangle the assertion environment calls the $\text{ST} \langle type \rangle \text{AssEnv}$ environment provided by the statements package; see Figure 2 for a list of provided assertion types. Their formatting can be customized by redefining the $\text{ST} \langle type \rangle \text{AssEnv}$ environment via the \renewtheorem command from the ntheorem package; see [MS] for details.

The axiom environment is similar to assertion, but the content has a different ontological status: axioms are assumed without (formal) justification, whereas assertions are expected to be justified from other assertions, axioms or definitions. This environment relegates the formatting to the STaxiomEnv environment, which can be redefined for configuration.
<table>
<thead>
<tr>
<th>Value</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>theorem, proposition</td>
<td>an important assertion with a proof</td>
</tr>
<tr>
<td></td>
<td>Note that the meaning of theorem (in this case the existence of a proof) is not enforced by OMDoc applications. It can be appropriate to give an assertion the theorem, if the author knows of a proof (e.g. in the literature), but has not formalized it in OMDoc yet.</td>
</tr>
<tr>
<td>lemma</td>
<td>a less important assertion with a proof</td>
</tr>
<tr>
<td></td>
<td>The difference of importance specified here is even softer than the other ones, since e.g. reusing a mathematical paper as a chapter in a larger monograph, may make it necessary to downgrade a theorem (e.g. the main theorem of the paper) and give it the status of a lemma in the overall work.</td>
</tr>
<tr>
<td>corollary</td>
<td>a simple consequence</td>
</tr>
<tr>
<td></td>
<td>An assertion is sometimes marked as a corollary to some other statement, if the proof is considered simple. This is often the case for important theorems that are simple to get from technical lemmata.</td>
</tr>
<tr>
<td>postulate, conjecture</td>
<td>an assertion without proof or counter-example</td>
</tr>
<tr>
<td></td>
<td>Conjectures are assertions, whose semantic value is not yet decided, but which the author considers likely to be true. In particular, there is no proof or counter-example.</td>
</tr>
<tr>
<td>false-conjecture</td>
<td>an assertion with a counter-example</td>
</tr>
<tr>
<td></td>
<td>A conjecture that has proven to be false, i.e. it has a counter-example. Such assertions are often kept for illustration and historical purposes.</td>
</tr>
<tr>
<td>obligation, assumption</td>
<td>an assertion on which a proof of another depends</td>
</tr>
<tr>
<td></td>
<td>These kinds of assertions are convenient during the exploration of a mathematical theory. They can be used and proven later (or assumed as an axiom).</td>
</tr>
<tr>
<td>rule</td>
<td>a normative assertion</td>
</tr>
<tr>
<td>observation, remark</td>
<td>if everything else fails</td>
</tr>
<tr>
<td></td>
<td>This type is the catch-all if none of the others applies.</td>
</tr>
</tbody>
</table>

**Example 2:** Types of Mathematical Assertions
2.2.2 Symbols

The \texttt{symboldec} environment can be used for declaring concepts and symbols. Note the \texttt{symdef} forms from the \texttt{modules} package will not do this automatically (but the \texttt{definition} environment and the \texttt{inlinedef} macro will for all the definienda; see below). The \texttt{symboldec} environment takes an optional keywords argument with the keys \texttt{id}, \texttt{role}, \texttt{title} and \texttt{name}. The first is for general identification, the \texttt{role} specifies the OPENMATH/OMDoc role, which is one of \texttt{object}, \texttt{type}, \texttt{sort}, \texttt{binder}, \texttt{attribution}, \texttt{application}, \texttt{constant}, \texttt{semantic-attribution}, and \texttt{error} (see the OMDoc specification for details). The \texttt{name} key specifies the OPENMATH name of the symbol, it should coincide with the control sequence introduced by the corresponding \texttt{symdef} (if one is present). The \texttt{title} key is for presenting the title of this symbol as in other statements. Usually, \texttt{axiom} and \texttt{symboldec} environments are used together as in Figure 3.

2.2.3 Types

In many cases, we can give additional information for symbols in the form of type assignments. \LaTeX{} does not fix a type system, but allows types to be arbitrary mathematical objects that they can be defined in (imported) modules. The \texttt{\symtype} macro can be used to assign a type to a symbol:

\begin{verbatim}
\symtype[\langle keys\rangle]{\langle sym\rangle}{\langle type\rangle}
\end{verbatim}

assigns the type \langle type\rangle to a symbol with name \langle sym\rangle. For instance

\begin{verbatim}
\symtype[id=plus-nat.type,system=sts]{plus}{\fntype{\Nat,\Nat}\Nat}
\end{verbatim}

assigns the type $\Nat \times \Nat \to \Nat$ (in the \texttt{sts} type system) to the symbol \texttt{plus}. This states (type assignments are statements epistemologically) that addition is a binary function on natural numbers. The \texttt{\symtype} macro supports the keys \texttt{id} (for identifiers) and \texttt{system} for the type system.

Often, type assignments occur in informal context, where the type assignment is given by a natural language sentence or phrase. For this, the \texttt{statements} package supplies the \texttt{typedec} environment and the \texttt{inlinetypedec} macro. Both take an optional keyval argument followed by the type. The phrase/sentence is the body of the \texttt{typedec} environment and the last argument of the \texttt{inlinetypedec} macro. The symbol name is given in via the \texttt{for} key. For convenience, the macro \texttt{\thedectype} is bound to the type. So we can use

\begin{verbatim}
\begin{typedec}[for=plus,id=plus-nat.type]{\fntype{\Nat,\Nat}\Nat}
  \+\texttt{:\thedectype}\texttt{ is a binary function on }\Nat\Nat
\end{typedec}
\end{verbatim}

instead of the \texttt{\symtype} above in an informal setting.
Symbol \texttt{zero}: (The number zero)
The number zero, it is used as the base case of the inductive definition of natural numbers via the Peano Axioms.

Symbol \texttt{succ}: (The Successor Function)
The successor function, it is used for the step case of the inductive definition of natural numbers via the Peano Axioms.

Symbol \texttt{NaturalNumbers}: (The Natural Numbers)
The natural numbers inductively defined via the Peano Axioms.

Axiom 2.2 (P1) $0$ is a natural number.

...  
Axiom 2.6 (P5) Any property $P$ such $P(0)$ and $P(s(n))$ whenever $P(n)$ holds for all $n$ in \texttt{NaturalNumbers}
2.2.4  Definitions, and Definienda

The *definition* environment is used for marking up mathematical definitions. Its peculiarity is that it defines (i.e. gives a meaning to) new mathematical concepts or objects. These are identified by the \definiendum macro, which is used as \definiendum{⟨keys⟩}{⟨text⟩}. Here, ⟨text⟩ is the text that is to be emphasized in the presentation. \definiendum takes the key name for the optional system name of the symbol defined (for reference via \termref, see Section 2.3). If the name key is not given, then ⟨text⟩ is used as a system name instead, which is usually sufficient for most situations. The set of keys is extensible to add additional metadata for the definiendum. Currently only the lemma key is supported, which allows to specify the base form of the name of the concept involved – e.g. for referencing in a glossary or index.

\symdef{one}{1}
\begin{definition}[id=one.def,for=one]
  \definiendum[one]{\one} is the successor of \zero (formally: \one := \succ \zero)
\end{definition}

will lead to the result

Definition 2.7 1 is the successor of 0 (formally: $1 := s(0)$)

Example 4: A Definition based on Figure 3

The \defi{⟨word⟩} macro combines the functionality of the \definiendum macro with index markup from the omdoc package [Koh16b]. For definienda where the lemma and ⟨text⟩ coincide use

\defi[⟨name⟩]{⟨lemma⟩}{⟨indexkeys⟩}

to markup a definiendum ⟨lemma⟩ with system name ⟨name⟩ that appear in the index (where ⟨indexkeys⟩ are passed to the \omdoc@index* macros from the omtext package) — in other words in almost all definitions of single-word concepts. We also have the variants \defii, \defiii, and \defiv for (adjectivized) multi-word compounds. Note that if the definiendum contains semantic macros, then we need to specify the loadmodules key and also protect the semantic macro. For instance if \eset is the semantic macro for ∅, then we would use

\defii[eset-comp]{$\protect\eset$}{compatible}[loadmodules]

for the definiendum markup.

For the cases where the lemma and ⟨text⟩ are different we can use the variants \adefi, \adefii, \adefiii, and \adefiv that have an additional first argument that allows to specify an alternative ⟨text⟩; see Figure 5. The main use of these is to mark up inflected forms as in Figure 5.
A \textit{graph} consists of \textit{vertices} and \textit{edges}.

\begin{example}

Definienda where Lemma and Text Form differ

As the greatest number of these are plurals, which tends to be regular (e.g. adding a trailing “s” in English), we provide the variants \texttt{defis}, \texttt{defiis}, \texttt{defiiis}, and \texttt{defivs} for that case: \texttt{defiiis\{simple\}\{group\}} is equivalent to much longer \texttt{defiis\{simple groups\}\{simple\}\{group\}} (but also see Figure 5).

\begin{tabular}{|c|c|c|}
\hline
\texttt{source} & \texttt{system name} & \texttt{result} \\
\hline
\texttt{defi\{concept\}} & \texttt{concept} & \texttt{concept} \\
\hline
\texttt{defi\{csymbol\}\{concept\}} & \texttt{csymbol} & \texttt{concept} \\
\hline
\texttt{adefi\{csymbol\}\{concepts\}\{concept\}} & \texttt{csymbol} & \texttt{concepts} \\
\hline
\texttt{defii\{concept\}\{group\}} & \texttt{concept-group} & \texttt{concept group, concept group, concept group} \\
\hline
\texttt{adefi\{small\}\{concept\}\{group\}} & \texttt{small-concept-group} & \texttt{small concept group, concept group} \\
\hline
\end{tabular}

\end{example}

\begin{example}

Some definienda with Index

Note that the \texttt{definiendum}, \texttt{defi*}, \texttt{adefi*}, and \texttt{defi*s} macros can only be used inside the definitional situation, i.e. in a \texttt{definition} or \texttt{symboldec} environment or a \texttt{inlinedef} macro. If you find yourself in a situation where you want to use it outside, you will most likely want to wrap the appropriate text fragment in a \texttt{begin\{definition\}\{display=flow\}} ... and \texttt{end\{definition\}}. For instance, we could continue the example in Figure 3 with the \texttt{definition} environment in Figure 4.

\begin{verbatim}
\begin{definition}[display=flow]...
\end{definition}
\end{verbatim}

Sometimes we define mathematical concepts in passing, e.g. in a phrase like “...s(o) which we call \texttt{one}.”. For this we cannot use the \texttt{definition} environment, which presupposes that its content gives all that is needed to understand the definition. But we do want to make use of the infrastructure introduced for the \texttt{definition} environment. In this situation, we just wrap the phrase in an \texttt{inlinedef} macro that makes them available. The \texttt{inlinedef} macro accepts the same \texttt{id} and \texttt{for} keys in its optional argument, and additionally the \texttt{verbalizes} key which can be used to point to a full definition of the concept somewhere else.

Note that definienda can only be referenced via a \texttt{term} element, if they are only allowed inside a named module, i.e. a \texttt{module} environment with a name given by the \texttt{id=} key or the \texttt{theory=} key on is specified on the definitional environment.
2.2.5 Examples

The example environment is a generic statement environment, except that the for key should be given to specify the identifier what this is an example for. The example environment also expects a type key to be specified, so that we know whether this is an example or a counterexample.

\texttt{\textbackslash \texttt{inlineex}} The \texttt{\textbackslash \texttt{inlineex}} is analogous to \texttt{\textbackslash \texttt{inlinedef}}, only that it is used for inline examples, e.g. “...mammals, e.g. goats”. Note that we have used an inline example for an inline example.

2.3 Cross-Referencing Symbols and Concepts

If we have defined a concept with the \texttt{\textbackslash \texttt{definiendum}} macro, then we can mark up other occurrences of the term as referring to this concept. Note that this process cannot be fully automatized yet, since that would need advanced language technology to get around problems of disambiguation, inflection, and non-contiguous phrase\footnote{We do have a program that helps annotate larger text collections spotting the easy cases; see \url{http://kwarc.info/projects/stex} and look for the program termin.}. Therefore, the \texttt{\textbackslash \texttt{termref}} can be used to make this information explicit. It takes the keys

\begin{itemize}
  \item \texttt{\textbackslash \texttt{termref}} \texttt{\{cd=\langle cd \rangle, name=\langle name \rangle\\}\{\langle text \rangle\}} will just typeset the link text \texttt{\langle text \rangle} with (if the \texttt{hyperref} package is loaded) a hyperlink to the definition in module \texttt{\langle cd \rangle} that defines the concept \texttt{\langle name \rangle}, e.g. that contains \texttt{\textbackslash \texttt{defi}\{(\langle name \rangle)\}\{\langle text \rangle\}}.
  \item Just as the \texttt{\textbackslash \texttt{definiendum}} macro has the convenience variants \texttt{\textbackslash \texttt{defi}} and \texttt{\textbackslash \texttt{?defi*}}, the \texttt{\textbackslash \texttt{termref}} has variants \texttt{\textbackslash \texttt{trefi}}, \texttt{\textbackslash \texttt{trefii}}, \texttt{\textbackslash \texttt{trefiii}}, and \texttt{\textbackslash \texttt{trefiv}} that take two and three arguments for the parts of the compositum. In the same module, concepts that are marked up by \texttt{\textbackslash \texttt{defi}\{(\langle name \rangle)\}} in the definition can be referenced by \texttt{\textbackslash \texttt{trefi}\{(\langle name \rangle)\}}. Here the link text is just \texttt{\langle name \rangle}. Concepts defined via \texttt{\textbackslash \texttt{defii}\{(\langle first \rangle)\}\{\langle second \rangle\}} can be referenced by \texttt{\textbackslash \texttt{trefii}\{(\langle first \rangle)\}\{\langle second \rangle\}} (with link text “\texttt{\langle first \rangle \langle second \rangle}”) and analogously for \texttt{\textbackslash \texttt{trefiii}} and \texttt{\textbackslash \texttt{trefiv}}.
  \item We have variants \texttt{\textbackslash \texttt{atrefi}}, \texttt{\textbackslash \texttt{atrefii}}, \texttt{\textbackslash \texttt{atrefiii}}, and \texttt{\textbackslash \texttt{atrefiv}} with alternative link text. For instance \texttt{\textbackslash \texttt{atrefii}\{(\langle text \rangle)\}\{\langle first \rangle\}\{\langle second \rangle\}} references a concept introduced by \texttt{\textbackslash \texttt{defii}\{(\langle first \rangle)\}\{\langle second \rangle\}} but with link text \texttt{\langle text \rangle}. Of course, if the system identifier is given explicitly in the optional argument of the definition
form, as in \texttt{\defi{name}{\{first\}}{\{second\}}}, then the terms are referenced by \texttt{\tref{name}}.

For referencing terms outside the current module, the module name can be specified in the first optional argument of the \texttt{\*tref*} macros. To specify the \texttt{cdbase}, we have to resort to the \texttt{\termref} macro with the keyval arguments.

Note that the \texttt{\termref} treatment above is natural for “concepts” declared by the \texttt{\termdef} macro from the \texttt{modules} package \[KGA16\]. Concepts are natural language names for mathematical objects. For “symbols”, i.e. symbolic identifiers for mathematical objects used in mathematical formulae, we use the \texttt{\symdef} macro from the \texttt{modules} package. Sometimes, symbols also have an associated natural language concept, and we want to use the symbol name to reference it (instead of specifying \texttt{cd} and \texttt{name} which is more inconvenient). For this the \texttt{\symref statements} package supplies the \texttt{\symref} macro. Like \texttt{\termref}, and invocation of \texttt{\symref{\{cseq\} \{text\}}} will just typeset \texttt{\{text\}} with a hyperlink to the relevant definition (i.e. the one that has the declaration \texttt{for=\{cseq\}} in the metadata argument.)

The \texttt{\term} macro is a variant of the \texttt{\termref} macro that marks up a phrase as a (possible) term reference, which does not have a link \emph{yet}. This macro is a convenient placeholder for authoring, where a \texttt{\termref} annotation is (currently) too tedious or the link target has not been authored yet. It facilitates lazy flexification workflows, where definitions for mathematical concepts are supplied or marked up by need (e.g. after a \texttt{grep} shows that the number of \texttt{\term} annotations of a concept is above a threshold). Editors or active documents can also support the \texttt{\term} macro like a wiki-like dangling link: a click on \texttt{\term{\{phrase\}}} could generate a new editor buffer with a stub definition (an \texttt{definition} environment with \texttt{\definiendum} macro and appropriate metadata).

\section{Configuration of the Presentation}

The \texttt{\defemph} macro is a configuration hook that allows to specify the style of presentation of the definiendum. By default, it is set to \texttt{\bf} as a fallback, since we can be sure that this is always available. It can be customized by redefinition: For instance \texttt{\renewcommand{\defemph}{1}{\bf\#1}}, changes the default behavior to italics.

The \texttt{\termemph} macro does the same for the style for \texttt{\termref}, it is empty by default. Note the term might carry an implicit hyper-reference to the defining occurrence and that the presentation engine might mark this up, changing this behavior.

The \texttt{\stDMemph} macro does the same for the style for the markup of the discourse markers like “Theorem”. If it is not defined, it is set to \texttt{\bf}; that allows to preset this in the class file.

Some authors like to lowercase the semantic references, i.e. use “axiom 2.6” instead of the default \texttt{Axiom 2.6} to refer to the last axiom in Figure 3. This can

\begin{itemize}
  \item[] \textsuperscript{1} EdNote: MK: we probably need multi-part variants for \texttt{\*tref*}
  \item[] \textsuperscript{2} EdNote: function declarations
\end{itemize}
be achieved by redefining the \texttt{\textbackslash STpresent} macro, which is applied to the keyword of the \texttt{\textbackslash ST*Env} theorem environments.\footnote{EdNote: this does not quite work as yet, since \texttt{\textbackslash STpresent} is applied when the label is written. But we would really like to have it applied when the reference is constructed. But for that we need to split the label into keyword and number in package \texttt{sref}.}

Finally, we provide configuration hooks in Figure 7 for the statement types provided by the \texttt{statement} package. These are mainly intended for package authors building on \texttt{statements}, e.g. for multi-language support. The language bindings are given in the \texttt{smultiling [KG16]} package not in \texttt{statements} itself.

<table>
<thead>
<tr>
<th>Environment</th>
<th>configuration macro</th>
<th>value</th>
</tr>
</thead>
<tbody>
<tr>
<td>\texttt{\textbackslash STtheoremAssEnv}</td>
<td>\texttt{\textbackslash st@theorem@kw}</td>
<td>Theorem</td>
</tr>
<tr>
<td>\texttt{\textbackslash STlemmaAssEnv}</td>
<td>\texttt{\textbackslash st@lemma@kw}</td>
<td>Lemma</td>
</tr>
<tr>
<td>\texttt{\textbackslash STpropositionAssEnv}</td>
<td>\texttt{\textbackslash st@proposition@kw}</td>
<td>Proposition</td>
</tr>
<tr>
<td>\texttt{\textbackslash STcorollaryAssEnv}</td>
<td>\texttt{\textbackslash st@corollary@kw}</td>
<td>Corollary</td>
</tr>
<tr>
<td>\texttt{\textbackslash STconjectureAssEnv}</td>
<td>\texttt{\textbackslash st@conjecture@kw}</td>
<td>Conjecture</td>
</tr>
<tr>
<td>\texttt{\textbackslash STfalseconjectureAssEnv}</td>
<td>\texttt{\textbackslash st@falseconjecture@kw}</td>
<td>Conjecture (false)</td>
</tr>
<tr>
<td>\texttt{\textbackslash STpostulateAssEnv}</td>
<td>\texttt{\textbackslash st@postulate@kw}</td>
<td>Postulate</td>
</tr>
<tr>
<td>\texttt{\textbackslash STobligationAssEnv}</td>
<td>\texttt{\textbackslash st@obligation@kw}</td>
<td>Obligation</td>
</tr>
<tr>
<td>\texttt{\textbackslash STassumptionAssEnv}</td>
<td>\texttt{\textbackslash st@assumption@kw}</td>
<td>Assumption</td>
</tr>
<tr>
<td>\texttt{\textbackslash STobservationAssEnv}</td>
<td>\texttt{\textbackslash st@observation@kw}</td>
<td>Observation</td>
</tr>
<tr>
<td>\texttt{\textbackslash STremarkAssEnv}</td>
<td>\texttt{\textbackslash st@remark@kw}</td>
<td>Remark</td>
</tr>
<tr>
<td>\texttt{\textbackslash STruleAssEnv}</td>
<td>\texttt{\textbackslash st@rule@kw}</td>
<td>Rule</td>
</tr>
<tr>
<td>\texttt{\textbackslash STexampleEnv}</td>
<td>\texttt{\textbackslash st@example@kw}</td>
<td>Example</td>
</tr>
<tr>
<td>\texttt{\textbackslash STaxiomEnv}</td>
<td>\texttt{\textbackslash st@axiom@kw}</td>
<td>Axiom</td>
</tr>
<tr>
<td>\texttt{\textbackslash STdefinitionEnv}</td>
<td>\texttt{\textbackslash st@definition@kw}</td>
<td>Definition</td>
</tr>
<tr>
<td>\texttt{\textbackslash STnotationEnv}</td>
<td>\texttt{\textbackslash st@notation@kw}</td>
<td>Notation</td>
</tr>
</tbody>
</table>

Example 7: Configuration Hooks for statement types

4 Limitations

In this section we document known limitations. If you want to help alleviate them, please feel free to contact the package author. Some of them are currently discussed in the \texttt{\LaTeX} GitHub repository \cite{STEX}.

1. none reported yet

5 The Implementation

5.1 Package Options

We declare some switches which will modify the behavior according to the package options. Generally, an option \texttt{xxx} will just set the appropriate switches to true
otherwise they stay false). First we have the general options: \texttt{msection} specifies that theorems should be numbered in the \texttt{msection} counter provided by the \texttt{mikoslides} package/class.

\begin{verbatim}
\newif\ifdef@index\def@indexfalse
\DeclareOption{defindex}{\def@indextrue}
\newif\if@nthm\@nthmtrue
\DeclareOption{nontheorem}{\@nthmfalse}
\newif\if@msection\@msectionfalse
\DeclareOption{msection}{\@msectiontrue}
\DeclareOption*{\PassOptionsToPackage{\CurrentOption}{omtext}}
\ProcessOptions
\end{verbatim}

The next measure is to ensure that some \LaTeX\ packages are loaded: \texttt{omdoc} for the statement keys, \texttt{modules} since we need module identifiers for referencing. Furthermore, we need the \texttt{ntheorem} package for presenting statements.

\begin{verbatim}
\RequirePackage{omtext}
\RequirePackage[base]{babel}
\ifcsdef{proof}{\cslet{proof}{\relax}\cslet{endproof}{\relax}}{}% to redefine if necessary
\if@nthm
\RequirePackage[hyperref]{ntheorem}
\theoremstyle{plain}
\else
\RequirePackage{amsthm}
\fi
\end{verbatim}

Now, we define an auxiliary function that lowercases strings

Sometimes it is necessary to fallback to symbol names in order to generate xml:id attributes. For this purpose, we define an auxiliary function which ensures the name receives a unique NCName equivalent.\footnote{\textit{EdNote}: Hard to be unique here, e.g., the names "foo_bar" and "foo bar" would receive the same xml:id attributes... of course we can devise a more complex scheme for the symbol replacement.}

The following functions are strictly utility functions that makes our life easier later on.

For the other languages, we set up triggers

\begin{verbatim}
\AfterBabelLanguage{ngerman}{\input{statements-german.ldf}}
\AfterBabelLanguage{arabic}{\input{statements-arabic.ldf}}
\end{verbatim}

\subsection{Statements}

We define a meta-macro that allows us to define several variants of statements.

\texttt{\STpresent}\providecommand\STpresent[1]{#1}\define@statement@env

\texttt{\define@statement@env}
and finally initialize the environment using the appropriate macro. Upon ending the environment, we just run the respective termination macro.

22 \def\define@statement@env#1{\%23 ifcsdef{#1}\{\cslet{#1}{\relax}\cslet{end#1}{\relax}}\% to redefine if necessary24 \newenvironment{#1}[1][]{\metasetkeys{omtext}{#1}\sref@target%25 \ifin@omtexttrue\%26 \ifdef\omtextdisplay\st@flow\else\%27 \ifdef\omtexttitle\else\begin{ST#1Env}\else\begin{ST#1Env}\omtexttitle\fi28 \ifdef\sref@id\else\label{#1.\sref@id}\fi\%29 \csname st@#1@initialize\endcsname\ifx\omtextdisplay\st@flow\else\fi\%30 \ifdef\sref@id\else\sref@label@id{here}\else\%31 \sref@label@id{\STpresent{\csname st@#1@kw\endcsname}\@currentlabel}\fi\%32 \ignorespaces}33 \{\csname st@#1@terminate\endcsname\ifdef\omtextdisplay\st@flow\else\end{ST#1Env}\fi%34 \omtext@post@skip\ifin@omtextfalse\}%

assertion
35 \newenvironment{assertion}[1][]{\metasetkeys{omtext}{#1}\sref@target%36 \ifin@omtexttrue\%37 \ifdef\omtextdisplay\st@flow\else\%38 \itshape\noindent\ignorespaces\%39 \else% display!=flow40 \xdef\@@@type{\omtexttype}% to keep it safe from \inlinedef41 \ifdef\omtexttitle\else\begin{ST\@@@type AssEnv}\else\begin{ST\@@@type AssEnv}\omtexttitle\fi\%42 \fi%43 \%display=flow44 \ifdef\omtextdisplay\st@flow\else\%45 \ifdef\omtexttype\else\%46 \sref@label@id{\STpresent{\csname st@\@@@type @kw\endcsname}\@currentlabel}\%47 \fi\}48 \{\ifdef\omtextdisplay\st@flow\else\end{ST\@@@type AssEnv}\ifin@omtextfalse\fi\%}

\st@kw We configure the default keywords for the various theorem environments.

49 \def\st@theorem@kw{Theorem}50 \def\st@lemma@kw{Lemma}51 \def\st@proposition@kw{Proposition}52 \def\st@corollary@kw{Corollary}53 \def\st@conjecture@kw{Conjecture}54 \def\st@falseconjecture@kw{Conjecture (false)}55 \def\st@postulate@kw{Postulate}56 \def\st@obligation@kw{Obligation}57 \def\st@assumption@kw{Assumption}58 \def\st@rule@kw{Rule}59 \def\st@observation@kw{Observation}60 \def\st@remark@kw{Remark}

Then we configure the presentation of the theorem environments
61 \if@nthm62 \theorembodyfont{\itshape}
We define a number of internal assertion environments according to the values of its type key.

\if@mssection
\newtheorem{STtheoremAssEnv}{\st@theorem@kw}[msection]
\else
\ifdef{\thesection}
\newtheorem{STtheoremAssEnv}{\st@theorem@kw}[section]
\\newtheorem{STtheoremAssEnv}{\st@theorem@kw}
\fi
\newtheorem{STlemmaAssEnv}[STtheoremAssEnv]{\st@lemma@kw}
\newtheorem{STpropositionAssEnv}[STtheoremAssEnv]{\st@proposition@kw}
\newtheorem{STcorollaryAssEnv}[STtheoremAssEnv]{\st@corollary@kw}
\newtheorem{STconjectureAssEnv}[STtheoremAssEnv]{\st@conjecture@kw}
\newtheorem{STfalseconjectureAssEnv}[STtheoremAssEnv]{\st@falseconjecture@kw}
\newtheorem{STpostulateAssEnv}[STtheoremAssEnv]{\st@postulate@kw}
\newtheorem{STobligationAssEnv}[STtheoremAssEnv]{\st@obligation@kw}
\newtheorem{STassumptionAssEnv}[STtheoremAssEnv]{\st@assumption@kw}
\newtheorem{STobservationAssEnv}[STtheoremAssEnv]{\st@observation@kw}
\if@nthm\theorembodyfont{\rmfamily}\else\theoremstyle{definition}\fi
\newtheorem{STremarkAssEnv}[STtheoremAssEnv]{\st@remark@kw}
\newtheorem{STruleAssEnv}[STtheoremAssEnv]{\st@rule@kw}

\def\st@example@initialize{}
\def\st@example@terminate{}
\define@statement@env{example}
\def\st@example@kw{Example}
\newtheorem{STexampleEnv}[STtheoremAssEnv]{\st@example@kw}

\def\st@axiom@initialize{}
\def\st@axiom@terminate{}
\define@statement@env{axiom}
\def\st@axiom@kw{Axiom}
\newtheorem{STaxiomEnv}[STtheoremAssEnv]{\st@axiom@kw}

We use \symdef@type from the modules package as the visual cue.

\srefaddidkey{symboldec}
\addmetakey{symboldec}{functions}
\addmetakey{symboldec}{role}
\addmetakey{symboldec}{title}
\addmetakey{symboldec}{name}
\addmetakey{symboldec}{subject}
\addmetakey{symboldec}{display}
\newenvironment{symboldec}{\metasetkeys{symboldec}{#1}\sref@target\st@indeftrue%}{\par\fi}
5.2.1 Types

EdNote: MKDG; the type element should percolate up.
The `\notatiendum` macro is a variant of the `\sref@target` macro provided by the `sref` package specialized for the use in the `\definiendum`, `\defi*`, `\Defi*`, `\defi*s`, and `\Defi*s` macros. The `\notatiendum` macro is defined to make a target with label `sref@(opt)(modulename)@target`, if `(opt)` is non-empty, else with the label `sref@(name)(modulename)@target` (the first time it encounters this symbol; i.e., if `\sref@(name)(modulename)@defined` is undefined). And it formats the `\defemph`-emphasized `(text)`. Also it generates the necessary warnings for a definiendum-like macro.

The `\definiendum` and `\notatiendum` macros are very simple. This macro is experimental, it is supposed to be invoked in `\definiendum` to define a macro with the definiendum text, so that can be re-used later in term assignments (see the `modules` package). But in the current context, where we rely on TeX groupings for visibility, this does not work, since the invocations of `\definiendum` are in definition environments and thus one group level too low. Keeping this for future reference.
\addmetakey{definiendum}{name}
\addmetakey{definiendum}{lemma}
\newcommand\definiendum[2][]\{\setkeys{definiendum}{#1}\%
\st@def@target{\definiendum@name}{\definiendum@name}{#2}\}

\notatiendum the notatiendum macro also needs to be visible in the notation and definition environments
\newcommand\notatiendum[2][]\{\notemph{#2}\}

We expand the LaTeX XML bindings for \defi, \defii, \defiii and \defiv into two instances one will be used for the definition and the other for indexing.
\defi We split the \defi macro in two: \defi does the definiendum bit and \@defi handles the last optional argument and does the indexing. The information flow between them goes via the local \@phrase macro.
\newcommand\@defi[1][]\{\ifdef@index\omdoc@indexi[#1]{\@verb}\fi\xspace\}
\newcommand\defi[2][]\{\metasetkeys{definiendum}{#1}\%
\st@def@target{\definiendum@name}{#2}{#2}\@phrase\def\@phrase{#2}\@defi\}
\newcommand\defis[2][]\{\metasetkeys{definiendum}{#1}\%
\st@def@target{\definiendum@name}{#2}{#2s}\@phrase\def\@phrase{#2}\@defi\}
\newcommand\Defi[2][]\{\metasetkeys{definiendum}{#1}\%
\st@def@target{\definiendum@name}{#2}{\capitalize{#2}}\@phrase\def\@phrase{#2}\@defi\}
\newcommand\Defis[2][]\{\metasetkeys{definiendum}{#1}\%
\st@def@target{\definiendum@name}{#2}{\capitalize{#2s}}\@phrase\def\@phrase{#2}\@defi\}

\adefi Again we split the \adefi macro into two parts: \adefi does the definiendum bit and \@adefi handles the last optional argument and does the indexing.
\newcommand\@adefi[1][]\{\ifdef@index\omdoc@indexii[#1]{\@pone}{\@ptwo}\fi\xspace\}
\newcommand\adefi[3][]\{\metasetkeys{definiendum}{#1}\%
\st@def@target{\definiendum@name}{#2-#3}{#2 #3}\@adefi\}
\newcommand\adefis[3][]\{\metasetkeys{definiendum}{#1}\%
\st@def@target{\definiendum@name}{#2-#3}{#2 #3s}\@adefi\}
\newcommand\Defii[3][]\{\metasetkeys{definiendum}{#1}\%
\st@def@target{\definiendum@name}{#2-#3}{\capitalize{#2 #3}}\@adefi\}
\newcommand\Defis[3][]\{\metasetkeys{definiendum}{#1}\%
\st@def@target{\definiendum@name}{#2-#3}{\capitalize{#2 #3s}}\@adefi\}
\defii analogous to \defi
\newcommand\defi[4][]\{\metasetkeys{definiendum}{#1}\def\pone(#3)\def\ptwo(#4)\%
\st@def@target{\definiendum@name}{#3-#4}{\#2}\@defii
\newcommand\@defii[1][]\{
  \ifdef@index%
  \ifx\definiendum@name\@empty\omdoc@indexii[#1]{\@pone}{\@ptwo}\
  \else\omdoc@indexii[\at=\definiendum@name,#1]{\@pone}{\@ptwo}\fi\%
  \fi\xspace\}
\defiii similar to \defii
\newcommand\@defiii[1][]\{\ifdef@index\omdoc@indexiii[#1]{\@pone}{\@ptwo}{\@pthree}\fi\xspace\}
\newcommand\defiii[4][]\{\metasetkeys{definiendum}{#1}\def\pone(#2)\def\ptwo(#3)\def\pthree(#4)\%
\st@def@target{\definiendum@name}{#2-#3-#4}{\#2 \#3 \#4}\@defiii
\newcommand\defiiis[4][]\{\metasetkeys{definiendum}{#1}\def\pone(#2)\def\ptwo(#3)\def\pthree(#4)\%
\st@def@target{\definiendum@name}{#2-#3-#4}{\#2 \#3 \#4s}\@defiii
\newcommand\Defiii[4][]\{\metasetkeys{definiendum}{#1}\def\pone(#2)\def\ptwo(#3)\def\pthree(#4)\%
\st@def@target{\definiendum@name}{#2-#3-#4}{\capitalize{\#2 \#3 \#4}}\@defiii
\newcommand\Defiiis[4][]\{\metasetkeys{definiendum}{#1}\def\pone(#2)\def\ptwo(#3)\def\pthree(#4)\%
\st@def@target{\definiendum@name}{#2-#3-#4}{\capitalize{\#2 \#3 \#4s}}\@defiii
\newcommand\defiii[5][]\{\metasetkeys{definiendum}{#1}\def\pone(#3)\def\ptwo(#4)\def\pthree(#5)\%
\st@def@target{\definiendum@name}{#3-#4-#5}{\#2}\@defiii
\newcommand\@defiii[1][]\{
  \ifdef@index%
  \ifx\definiendum@name\@empty\omdoc@indexiii[#1]{\@pone}{\@ptwo}{\@pthree}\
  \else\omdoc@indexiii[\at=\definiendum@name,#1]{\@pone}{\@ptwo}{\@pthree}\fi\%
  \fi\xspace\}
\defiv similar to \defiii
\newcommand\@defiv[1][]\{\ifdef@index\omdoc@indexiv[#1]{\@pone}{\@ptwo}{\@pthree}{\@ptfour}\fi\xspace\}
\newcommand\defiv[5][]\{\metasetkeys{definiendum}{#1}\def\pone(#2)\def\ptwo(#3)\def\pthree(#4)\def\ptfour(#5)\%
\st@def@target{\definiendum@name}{#2-#3-#4-#5}{\#2 \#3 \#4 \#5}\@defiv
\newcommand\defivs[5][]\{\metasetkeys{definiendum}{#1}\def\pone(#2)\def\ptwo(#3)\def\pthree(#4)\def\ptfour(#5)\%
\st@def@target{\definiendum@name}{#2-#3-#4-#5}{\#2 \#3 \#4 \#5s}\@defiv
\newcommand\Defiv[5][]\{\metasetkeys{definiendum}{#1}\def\pone(#2)\def\ptwo(#3)\def\pthree(#4)\def\ptfour(#5)\%
\st@def@target{\definiendum@name}{#2-#3-#4-#5}{\capitalize{\#2 \#3 \#4 \#5}}\@defiv
\newcommand\Defivs[5][]\{\metasetkeys{definiendum}{#1}\def\pone(#2)\def\ptwo(#3)\def\pthree(#4)\def\ptfour(#5)\%
\st@def@target{\definiendum@name}{#2-#3-#4-#5}{\capitalize{\#2 \#3 \#4 \#5s}}\@defiv
\defiv
\adefii
\newcommand\adefiv}[6]{\setkeys{definiendum}{#1}\
def\@pone{#3}\def\@ptwo{#4}\def\@pthree{#5}\def\@ptfour{#6}\
\set@def@target{\definiendum@name}{#3-#4-#5-#6}{#2}\@adefiv}
\newcommand\@adefiv}[1]{\
  \ifdef@index\
  \ifx\definiendum@name\@empty\@indiv[#1]{\@pone}{\@ptwo}{\@pthree}{\@ptfour}\else\@indiv[at=\definiendum@name,#1]{\@pone}{\@ptwo}{\@pthree}{\@ptfour}\fi\fi\xspace}
\inlineex
\newcommand\inlineex}[2]{\setkeys{omtext}{#1}\sref@target\sref@label@id{here}#2}
\inlineass
\newcommand\inlineass}[2]{\setkeys{omtext}{#1}\sref@target\sref@label@id{here}#2}
\inlinedef
\newcommand\inlinedef}[2]{\setkeys{omtext}{#1}\if@in@omtext\else% we are not in an omtext or statement\
  \PackageError{modules}{\protect\inlinedef\space outside a statement!}{Try wrapping the paragraph in a\MessageBreak
  \protect\begin{omtext}, \protect\begin{assertion}, \protect\begin{axiom}, ... \MessageBreak
  whatever is suitable semantically}\fi\fi\xspace\
  \sref@target\sref@label@id{here}\st@indeftrue #2}

\section{Cross-Referencing Symbols and Concepts}

\termref{(opt)}{⟨text⟩} makes a hyperlink with link text ⟨text⟩ to the definitional occurrence of the symbol specified by the name, cd, and cdbase keys in ⟨opt⟩. We first set sensible defaults if the keys are not given. If the symbol is defined in the current document (i.e. if the macro \sref@⟨name⟩@⟨cd⟩@defined is defined), then we make a local hyperref, otherwise we punt to \mod@termref.
\addmetakey*{termref}{cd}
\addmetakey*{termref}{cdbase}
\addmetakey*{termref}{name}
\addmetakey*{termref}{role}
\newcommand\termref}[2]{\setkeys{termref}{#1}\
  \ifdef\termref@cd\@empty\def\termref@cd{\mod@id}\fi\
  \ifdef\termref@name\@empty\def\termref@name{#2}\fi\
  \ifdef\termref@cdbase\@empty\def\termref@cdbase{#2}\fi\
  \ifdef\termref@defined{\sref@termref@name @\termref@cd @defined}\else\
  \\sref@href@ifh\termref@cdbase{#2}\fi\
  \def\@label{sref@termref@name @\termref@cd @target}\fi\
  \sref@hlink@ifh\@label{#2}\footnote{termref: internal reference to \@label}\
  \}}
Now we care about the configuration switches, they are set to sensible values, if they are not defined already. These are just configuration parameters, which should not appear in documents, therefore we do not provide LaTeXML bindings for them.

\term The \term macro is used for wiki-style dangling links with editor support.\footnote{\textbf{EdNote: MK: document above}}
The `\symref` macros is quite simple, since we have done all the heavy lifting in the `modules` package: we simply apply `\mod@symref@\langle arg1 \rangle` to `\langle arg2 \rangle`.

```latex
\newcommand{\symref}[2]{\@nameuse{mod@symref@#1}{#2}}
```

5.4 Deprecated Functionality

In this section we centralize old interfaces that are only partially supported any more.

```latex
\*def*
\newcommand{\defin}[2]{\defi[#1]{#2}}%
\PackageWarning{statements}{\protect\defin\space is deprecated, use \protect\defi\space instead}
\newcommand{\twindef}[3]{\defii[#1]{#2}{#3}}%
\PackageWarning{statements}{\protect\twindef\space is deprecated, use \protect\defii\space instead}
\newcommand{\atwindef}[4]{\defiii[#1]{#2}{#3}{#4}}%
\PackageWarning{statements}{\protect\atwindef\space is deprecated, use \protect\defiii\space instead}
\newcommand{\definalt}[3]{\adefi[#1]{#2}{#3}}%
\PackageWarning{statements}{\protect\definalt\space is deprecated, use \protect\adefi\space instead}
\newcommand{\twindefalt}[4]{\adefii[#1]{#2}{#3}{#4}}%
\PackageWarning{statements}{\protect\twindefalt\space is deprecated, use \protect\adefii\space instead}
\newcommand{\atwindefalt}[5]{\adefiii[#1]{#2}{#3}{#4}{#5}}%
\PackageWarning{statements}{\protect\atwindefalt\space is deprecated, use \protect\adefiii\space instead}
\*def*
\newcommand{\twinref}[3]{\trefii[#1]{#2}{#3}}%
\PackageWarning{statements}{\protect\twinref\space is deprecated, use \protect\trefii\space instead}
\newcommand{\atwinref}[4]{\atrefiii[#1]{#2}{#3}{#4}}%
\PackageWarning{statements}{\protect\atwinref\space is deprecated, use \protect\atrefiii\space instead}
```

```latex
\endinput
```
Index

Numbers written in italic refer to the page where the corresponding entry is described; numbers underlined refer to the code line of the definition; numbers in roman refer to the code lines where the entry is used.

*, \[\text{statement}, 10\] OpenMath, \[\text{statement block, } 3\]
block \[\text{statement, } 2\] LaTeXML, \[\text{statement block, } 20\]
statement \[\text{block, } 2\]
flow \[\text{OMDoc, } 2\] flow, \[\text{flow, } 3\]
Change History

v0.9
   General: First Version with Documentation 1
v0.9a
   General: Completed Documentation 1
v0.9b
   General: Complete functionality and Updated Documentation 1
v0.9c
   General: more packaging 1
v0.9d
   General: adding ids to many elements 1
   made dependence on the omdoc package explicit 1
   moved omtext and friends to the omdoc package 1
v0.9e
   General: adding cross-references 1
   augmenting the index macros with optional values 1
v0.9f
   General: changed 'consymb' to 'symboldec' and documented it 1
v0.9g
   General: Added support for localization 1
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   the package is now based on ntheorem for presentation 1
v1.0
   General: adding \inlineex 1
   now based on omtext package instead of omdoc 1
v1.1
   General: adding \usevocab to example for importing 1
   more support for types: typedec and \inlineypedec 1
   renaming all convenience macros for \definendum and \termref 1
v1.2
   General: adding \defis and friends 1
   adding \inlineass 1
   adding optional last arg to \~defi* 1
v1.3
   General: adding \Defi, \Trefi and friends 1
v1.4
   General: changing the optional argument of \defi and friends to a keyval argument 1

References


[sTeX] KWARC/sTeX. URL: \texttt{https://github.com/KWARC/sTeX} (visited on 05/15/2015).