

L^AT_EX3 News

Issue 10, November 2016

There has been something of a gap since the last L^AT_EX3 News, but this does not mean that work has not been going on. The Team have been working on a number of areas, many of which reflect wider take-up of `expl3`. There have also been a number of significant new developments in the L^AT_EX3 “sphere” in the last two years.

l3build: Testing L^AT_EX packages

Testing has been an important part of the work of the team since they assumed maintenance of L^AT_EX over twenty years ago. Various scripts have been used over that time by the team for testing, but these have until recently not been set up for wider use.

With the general availability of LuaT_EX it is now possible to be sure that every T_EX user has a powerful general scripting language available: Lua. The team have used this to create a new general testing system for T_EX code, `l3build`. This *is* designed to be used beyond the team, so is now available in T_EX Live and MiK_TE_X and is fully documented. Testing using `l3build` makes use of a normalised version of the `.log` file, so can test any aspect of T_EX output (e.g., by using `\showbox`) or its algorithms (by displaying results in the `.log`).

Part of the remit for creating `l3build` was to enable the team to work truly cross-platform and to allow testing using multiple T_EX engines (earlier systems were limited to a single engine, normally ε -T_EX). The new testing system means we are in a much stronger position to support a variety of engines (see below). It has also enabled us to give useful feedback on development of the LuaT_EX engine.

As well as the core capability in testing, `l3build` also provides a “one stop” script for creating release bundles. The script is sufficiently flexible that for many common L^AT_EX package structures, setting up for creating releases will require only a few lines of configuration.

In addition to the documentation distributed with `l3build`, the project website [1, publications in 2014] contains some articles, videos and conference presentations that explain how to use `l3build` to manage and test any type of (L^AT_EX) package.

Automating expl3 testing

As well as developing `l3build` for local use, the team have also set up integration testing for `expl3` using the Travis-CI system. This means that *every* commit to the L^AT_EX3 code base now results in a full set of tests being run. This has allowed us to significantly reduce the number of occasions where `expl3` needs attention before being released to CTAN.

Automated testing has also enabled us to check that `expl3` updates do not break a number of key third-party packages which use the programming environment.

Refining expl3

Work continues to improve `expl3` both in scope and robustness. Increased use of the programming environment means that code which has to-date been under-explored is being used, and this sometimes requires changes to the code.

The team have extended formal support in `expl3` to cover the engines pT_EX and upT_EX, principally used by Japanese T_EX users. This has been possible in part due to the `l3build` system discussed above. Engine-dependent variations between pdfT_EX, X_ƎT_EX, LuaT_EX and (u)pT_EX are now well-understood and documented. As part of this process, the “low-level” part of `expl3`, which saves all primitives, now covers essentially all primitives found in all of these engines.

The code in `expl3` is now entirely self-contained, loading no other third-party packages, and can also be loaded as a generic package with plain T_EX, *etc.* These changes make it much easier to diagnose problems and make `expl3` more useful. In particular it can be used as a programming language for generic packages, that then can run without modifications under different formats!

The team have made a range of small refinements to both internals and `expl3` interfaces. Internal self-consistency has also been improved, for example removing almost all use of `nopar` functions. Performance enhancements to the `l3keys` part of `expl3` are ongoing and should result in significantly faster key setting. As `keyval` methods are increasingly widely used in defining behaviours, this will have an impact on compile times for end users.

Replacing \lowercase and \uppercase

As discussed in the last L^AT_EX3 News, the team have for some time been keen to provide new interfaces

which do not directly expose (or in some cases even use) the \TeX primitives `\lowercase` and `\uppercase`. We have now created a series of different interfaces that provide support for the different conceptual uses which may flow from the primitives:

- For case changing text, `\tl_upper_case:n`, `\tl_lower_case:n`, `\tl_mixed_case:n` and related language-aware functions. These are Unicode-capable and designed for working with text. They also allow for accents, expansion of stored text and leaving math mode unchanged. At present some of the interface decisions are not finalised so they are marked as experimental, but the team expect the core concept to be stable.
- For case changing programming strings, `\str_upper_case:n`, `\str_lower_case:n` and `\str_fold_case:n`. Again these are Unicode-aware, but in contrast to the functions for text are not context-dependent. They are intended for caseless comparisons, constructing command names on-the-fly and so forth.
- For creating arbitrary character tokens, `\char_generate:nn`. This is based on the `\Ucharcat` primitive introduced by $X_{\text{T}}\TeX$, but with the ideas extended to other engines. This function can be used to create almost any reasonable token.
- For defining active characters, `\char_set_active_eq:MN` and related functions. The concept here is that active characters should be equivalent to some named function, so one does not directly define the active character.

Extending `xparse`

After discussions at TUG2015 and some experimentation, the team have added a new argument type, `e` (“embellishment”), to `xparse`. This allows arguments similar to \TeX primitive sub- and superscripts to be accepted. Thus

```
\DeclareDocumentCommand\foo{e{^_}}
  {\showtokens{"#1"}}
\foo^{Hello} world
```

will show

```
"{Hello}{-NoValue-}" .
```

At present, this argument type is experimental: there are a number of models which may make sense for this interface.

A new `\parshape` model

As part of development of `l3galley`, Joseph Wright has proposed a new model for splitting up the functions of the `\parshape` primitive into three logical elements:

- Margins between the edges of the galley and the paragraph (for example an indented block);
- Cut-out sections running over a fixed number of lines, to support “in place” figures and so forth;
- Running or single-paragraph shape.

There are additional elements to consider here, for example whether lines are the best way to model the length of shaping, how to handle headings, cut-outs at page breaks, *etc.*

Globally optimized pagination of documents

Throughout 2016 Frank Mittelbach has worked on methods and algorithms for globally optimizing the pagination of documents including those that contain floats. Early research results have been presented at $\text{Bacho}\TeX$ 2016, TUG 2016 in Toronto and later in the year at DocEng’16, the ACM Symposium on Document Engineering in Vienna. A link to the ACM paper (that allows a download free of charge) can be found on the project website [1]. The site also holds the speaker notes from Toronto and will host a link to a video of the presentation once it becomes available.

The framework developed by Frank is based on the extended functionality provided by $\text{Lua}\TeX$, in particular its callback functions that allow interacting with the typesetting process at various points. The algorithm that determines the optimal pagination of a given document is implemented in Lua and its results are then used to direct the formatting done by the \TeX engine.

At the current point in time this a working prototype but not yet anywhere near a production-ready system. However, the work so far shows great potential and Frank is fairly confident that it will eventually become a generally usable solution.

Looking forward

The $\text{Lua}\TeX$ engine has recently reached version 1.0. This may presage a stable $\text{Lua}\TeX$ and is likely to result in wider use of this engine in production documents. If that happens we expect to implement some of the more complex functionality (such as complex pagination requirements and models) only for $\text{Lua}\TeX$.

References

- [1] Links to various publications by members of the $\text{L}^{\text{A}}\text{T}_{\text{E}}\text{X}$ Project Team.
<https://www.latex-project.org/publications>.