The expl3 package and LATEX3 programming^{*}

The I₄T_EX3 Project[†]

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Abstract

This document gives an introduction to a new set of programming conventions that have been designed to meet the requirements of implementing large scale T_EX macro programming projects such as L^AT_EX . These programming conventions are the base layer of L^AT_EX3 .

The main features of the system described are:

- classification of the macros (or, in LATEX terminology, commands) into LATEX functions and LATEX parameters, and also into modules containing related commands;
- a systematic naming scheme based on these classifications;
- a simple mechanism for controlling the expansion of a function's arguments.

This system is being used as the basis for T_EX programming within the $I\!AT_EX3$ project. Note that the language is not intended for either document mark-up or style specification. Instead, it is intended that such features will be built on top of the conventions described here.

1 Introduction

The first step to develop a LATEX kernel beyond LATEX 2_{ε} is to address how the underlying system is programmed. Rather than the current mix of LATEX and TEX macros, the LATEX3 system provides its own consistent interface to all of the functions needed to control TEX. A key part of this work is to ensure that everything is documented, so that LATEX programmers and users can work efficiently without needing to be familiar with the internal nature of the kernel or with plain TEX.

The expl3 bundle provides this new programming interface for LATEX. To make programming systematic, LATEX3 uses some very different conventions to $\text{LATEX} 2_{\varepsilon}$ or plain TeX.

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As a result, programmers starting with IAT_EX3 will need to become familiar with the syntax of the new language.

The next section shows where this language fits into a complete T_EX -based document processing system. We then describe the major features of the syntactic structure of command names, including the argument specification syntax used in function names.

The practical ideas behind this argument syntax will be explained, together with the expansion control mechanism and the interface used to define variant forms of functions.

As we shall demonstrate, the use of a structured naming scheme and of variant forms for functions greatly improves the readability of the code and hence also its reliability. Moreover, experience has shown that the longer command names which result from the new syntax do not make the process of *writing* code significantly harder.

2 Languages and interfaces

It is possible to identify several distinct languages related to the various interfaces that are needed in a T_EX -based document processing system. This section looks at those we consider most important for the LATEX3 system.

Document mark-up This comprises those commands (often called tags) that are to embedded in the document (the .tex file).

It is generally accepted that such mark-up should be essentially *declarative*. It may be traditional T_EX-based mark-up such as I^AT_EX 2_{ε} , as described in [3] and [2], or a mark-up language defined via HTML or XML.

One problem with more traditional T_EX coding conventions (as described in [1]) is that the names and syntax of T_EX 's primitive formatting commands are ingeniously designed to be 'natural' when used directly by the author as document mark-up or in macros. Ironically, the ubiquity (and widely recognised superiority) of logical markup has meant that such explicit formatting commands are almost never needed in documents or in author-defined macros. Thus they are used almost exclusively by T_EX programmers to define higher-level commands, and their idiosyncratic syntax is not at all popular with this community. Moreover, many of them have names that could be very useful as document mark-up tags were they not pre-empted as primitives (e.g. \box or \special).

Designer interface This relates a (human) typographic designer's specification for a document to a program that 'formats the document'. It should ideally use a declarative language that facilitates expression of the relationship and spacing rules specified for the layout of the various document elements.

This language is not embedded in document text and it will be very different in form to the document mark-up language. For IAT_EX , this level was almost completely missing from $IAT_EX 2.09$; $IAT_EX 2_{\varepsilon}$ made some improvements in this area but it is still the case that implementing a design specification in IAT_EX requires far more 'low-level' coding than is acceptable.

Programmer interface This language is the implementation language within which the basic typesetting functionality is implemented, building upon the primitives of T_EX (or a successor program). It may also be used to implement the previous two languages 'within' T_EX , as in the current LATEX system.

The last layer is covered by the conventions described in this doucment, which describes a system aimed at providing a suitable basis for coding LAT_EX3 . Its main distinguishing features are summarised here:

- A consistent naming scheme for all commands, including TFX primitives.
- The classification of commands as LATEX functions or LATEX parameters, and also their division into modules according to their functionality.
- A simple mechanism for controlling argument expansion.
- Provision of a set of core LATEX functions that is sufficient for handling programming constructs such as queues, sets, stacks, property lists.
- A T_FX programming environment in which, for example, all white space is ignored.

3 The naming scheme

ETEX3 does not use @ as a 'letter' for defining internal macros. Instead, the symbols _ and : are used in internal macro names to provide structure. In contrast to the plain TEX format and the $\text{ETEX} 2_{\varepsilon}$ kernel, these extra letters are used only between parts of a macro name (no strange vowel replacement).

While T_{EX} is actually a macro processor, by convention for the expl3 programming language we distinguish between *functions* and *variables*. Functions can have arguments and they are either expanded or executed. Variables can be assigned values and they are used in arguments to functions; they are not used directly but are manipulated by functions (including getting and setting functions). Functions and variables with a related functionality (for example accessing counters, or manipulating token lists, etc.) are collected together into a *module*.

3.1 Examples

Before giving the details of the naming scheme, here are a few typical examples to indicate the flavour of the scheme; first some variable names.

\l_tmpa_box is a local variable (hence the l_ prefix) corresponding to a box register.

 g_tmpa_int is a global variable (hence the g_prefix) corresponding to an integer register (i.e. a T_EX count register).

 c_empty_toks is the constant $(c_)$ token register variable that is always empty.

Now here is an example of a typical function name.

 $\seq_push:Nn$ is the function which puts the token list specified by its second argument onto the stack specified by its first argument. The different natures of the two arguments are indicated by the :Nn suffix. The first argument must be a single token which 'names' the stack parameter: such single-token arguments are denoted N. The second argument is a normal T_EX 'undelimited argument', which may either be a single token or a balanced, brace-delimited token list (which we shall here call a *braced token list*): the n denotes such a 'normal' argument form. The name of the function indicates it belongs to the seq module.

3.2 Formal naming syntax

We shall now look in more detail at the syntax of these names. A function name in LATEX3 will have a name consisting of three parts:

 $\langle module \rangle_{\langle description \rangle: \langle arg-spec \rangle}$

while a variable will have (up to) four distinct parts to its name:

 $\langle scope \rangle_{module} \langle description \rangle_{type} \rangle$

The syntax of all names contains

 $\langle module \rangle$ and $\langle description \rangle$

these both give information about the command.

A *module* is a collection of closely related functions and variables. Typical module names include **int** for integer parameters and related functions, **seq** for sequences and **box** for boxes.

Packages providing new programming functionality will add new modules as needed; the programmer can choose any unused name, consisting of letters only, for a module. In general, the module name and module prefix should be related: for example, the kernel module containing box functions is called 13box.

The *description* gives more detailed information about the function or parameter, and provides a unique name for it. It should consist of letters and, possibly, _ characters. In general, the description should use _ to divide up 'words' or other easy to follow parts of the name. For example, the LATEX3 kernel provides $if_cs_exist:N$ which, as might be expected, tests if a command name exists.

As a semi-formalized concept the letter g is sometimes used to prefix certain parts of the $\langle description \rangle$ to mark the function as 'globally acting', e.g., $\int_set:Nn$ is a local operation while $\int_gset:Nn$ is a global operation. This of course goes hand in hand with when to use $\1_$ and $\g_$ variable prefixes.

3.2.1 Variables: scope and type

The $\langle scope \rangle$ part of the name describes how the variable can be accessed. Variables are classified as local, global or constant. This *scope* type appears as a code at the beginning of the name; the codes used are:

- **c** constants (global variables whose value should not be changed);
- **g** variables whose value should only be set globally;
- 1 variables whose value should only be set locally.

The $\langle type \rangle$ will be in the list of available *data-types*;¹ these include the primitive T_EX data-types, such as the various registers, but to these will be added data-types built within the LAT_EX programming system.

The data types in LAT_EX3 are:

int integer-valued count register;

tl 'token list variables': placeholders for token lists;

toks token register;

box box register;

skip 'rubber' lengths;

dim 'rigid' lengths;

num A 'fake' integer type using only macros. Useful for setting up allocation routines;

seq 'sequence': a data-type used to implement lists (with access at both ends) and stacks;

prop property list;

clist comma separated list;

stream an input or output stream (for reading from or writing to, respectively);

bool either true or false (the LATEX3 implementation does not use \iftrue or \iffalse).

When the $\langle type \rangle$ and $\langle module \rangle$ are identical (as often happens in the more basic modules) the $\langle module \rangle$ part is often omitted for aesthetic reasons.

The name 'token list' may cause confusion, and so some background is useful. T_EX works with tokens and lists of tokens, rather than characters. It provides two ways to store these token lists: within macros and as token registers (toks). IAT_EX3 retains the name 'toks' for the later, and adopts the name 'token list variables' (tl vars) for macros used to store tokens. In most circumstances, the tl var data type is more convenient for storing token lists.

 $^{^{1}}$ Of course, if a totally new data type is needed then this will not be the case. However, it is hoped that only the kernel team will need to create new data types.

3.2.2 Functions: argument specifications

Function names end with an $\langle arg-spec \rangle$ after a colon. This gives an indication of the types of argument that a function takes, and provides a convenient method of naming similar functions that differ only in their argument forms (see the next section for examples).

The $\langle arg-spec \rangle$ consists of a (possibly empty) list of letters, each denoting one argument of the function. The letter, including its case, conveys information about the type of argument required.

All functions have a base form with arguments using one of the following argument specifiers:

- ${f n}$ Unexpanded token or braced token list. This is a standard T_FX undelimited macro argument.
- N Single token (unlike n, the argument must *not* be surrounded by braces). A typical example of a command taking an N argument is \cs_set, in which the command being defined must be unbraced.
- p Primitive T_EX parameter specification.
 This can be something simple like #1#2#3, but may use arbitrary delimited argument syntax such as: #1,#2\g stop#3. This is used when defining functions.
- T,F These are special cases of n arguments, used for the true and false code in conditional commands.

There are two other specifiers with more general meanings:

- **D** This means: **Do not use**. This special case is used for T_EX primitives and other commands that are provided for use only while bootstrapping the LATEX kernel. Programmers outside the kernel team should not use these functions!
- **w** This means that the argument syntax is 'weird' in that it does not follow any standard rule. It is used for functions with arguments that take non standard forms: examples are T_EX -level delimited arguments and the boolean tests needed after certain primitive \if... commands.

In case of **n** arguments that consist of a single token the surrounding braces can be omitted in nearly all situations—functions that force the use of braces even for single token arguments are explicitly mentioned. However, programmers are encouraged to always use braces around **n** arguments, as this makes the relationship between function and argument clearer.

Further argument specifiers are available as part of the expansion control system. These are discussed in the next section.

4 Expansion control

Let's take a look at some typical operations one might want to perform. Suppose we maintain a stack of open files and we use the stack \g_ior_file_name_seq to keep track of them (io is the file reading and writing module: it uses the module prefixe ior for reading functions and variables). The basic operation here is to push a name onto this stack which could be done by the operation

\seq_gpush:Nn \g_ior_file_name_seq {#1}

where **#1** is the filename. In other words, this operation would push the file name as is onto the stack.

However, we might face a situation where the filename is stored in a variable of some sort, say \l_ior_curr_file_tl. In this case we want to retrieve the value of the variable. If we simply use

\seq_gpush:Nn \g_io_file_name_seq \l_io_curr_file_tl

we will not get the value of the variable pushed onto the stack, only the variable name itself. Instead a suitable number of \exp_after:wN would be necessary (together with extra braces) to change the order of expansion,² i.e.

```
\exp_after:wN
   \seq_gpush:Nn
   \exp_after:wN
        \g_io_file_name_seq
   \exp_after:wN
        { \l_io_curr_file_tl }
```

The above example is probably the simplest case but already shows how the code changes to something difficult to understand. Furthermore there is an assumption in this: that the storage bin reveals its contents after exactly one expansion. Relying on this means that you cannot do proper checking plus you have to know exactly how a storage bin acts in order to get the correct number of expansions. Therefore IATEX3 provides the programmer with a general scheme that keeps the code compact and easy to understand.

To denote that some argument to a function needs special treatment one just uses different letters in the arg-spec part of the function to mark the desired behaviour. In the above example one would write

\seq_gpush:NV \g_io_file_name_seq \l_io_curr_file_tl

²\exp_after:wN is the LATEX3 name for the TEX \expandafter primitive.

to achieve the desired effect. Here the V (the second argument) is for 'retrieve the value of the variable' before passing it to the base function.

The following letters can be used to denote special treatment of arguments before passing it to the base function:

c Character string used as a command name.

The argument (a token or braced token list) must, when fully expanded, produce a sequence of characters which is then used to construct a command name (via csname... endcsname). This command name is the single token that is passed to the function as the argument. Hence

\seq_gpush:cV { g_file_name_stack } \l_tmpa_tl

is equivalent to

\seq_gpush:NV \g_file_name_stack \l_tmpa_tl.

V Value of a variable.

This means that the contents of the register in question is used as the argument, be it an integer, a length-type register, a token list variable or similar. The value is passed to the function as a braced token list.

- **v** Value of a register, constructed from a character string used as a command name. This is a combination of c and V which first constructs a control sequence from the argument and then passes the value of the resulting register to the function.
- **x** Fully-expanded token or braced token list.

This means that the argument is expanded as in the replacement text of an \edef, and the expansion is passed to the function as a braced token list. This means that expansion takes place until only unexpandable tokens are left.

o One-level-expanded token or braced token list.

This means that the argument is expanded one level, as by \expandafter, and the expansion is passed to the function as a braced token list. Note that if the original argument is a braced token list then only the first token in that list is expanded. In general, using V should be preferred to using o for simple variable retrival.

f Almost the same as the x type except here the token list is expanded fully until the first unexpandable token is found and the rest is left unchanged. Note that if this function finds a space at the beginning of the argument it will gobble it and not expand the next argument.

4.1 Simpler means better

Anyone who programs in T_EX is frustratingly familiar with the problem of arranging that arguments to functions are suitably expanded before the function is called. To illustrate

how expansion control can bring instant relief to this problem we shall consider two examples copied from latex.ltx.

```
\global\expandafter\let
    \csname\cf@encoding \string#1\expandafter\endcsname
    \csname ?\string#1\endcsname
```

This first piece of code is in essence simply a global **\let** whose two arguments firstly have to be constructed before **\let** is executed. The **#1** is a control sequence name such as **\textcurrency**. The token to be defined is obtained by concatenating the characters of the current font encoding stored in **\cf@encoding**, which has to be fully expanded, and the name of the symbol. The second token is the same except it uses the default encoding ?. The result is a mess of interwoven **\expandafter** and **\csname** beloved of all T_FX programmers, and the code is essentially unreadable.

Using the conventions and functionality outlined here, the task would be achieved with code such as this:

```
\cs_gset_eq:cc
{ \cf@encoding \token_to_str:N #1 } { ? \token_to_str:N #1 }
```

The command \cs_gset_eq:cc is a global \let that generates command names out of both of its arguments before making the definition. This produces code that is far more readable and more likely to be correct first time. (\token_to_str:N is the LATEX3 name for \string.)

Here is the second example.

```
\expandafter
\in@
\csname sym#3%
\expandafter
\endcsname
\expandafter
{%
\group@list}%
```

This piece of code is part of the definition of another function. It first produces two things: a token list, by expanding \group@list once; and a token whose name comes from 'sym#3'. Then the function \in@ is called and this tests if its first argument occurs in the token list of its second argument.

Again we can improve enormously on the code. First we shall rename the function \in@ according to our conventions. A function such as this but taking two normal 'n' arguments might reasonably be named \seq_test_in:Nn; thus the variant function we need will be

defined with the appropriate argument types and its name will be \seq_test_in:cV. Now this code fragment will be simply:

\seq_test_in:cV { sym #3 } \l_group_seq

Note that, in addition to the lack of \expandafter, the space after the } will be silently ignored since all white space is ignored in this programming environment.

4.2 New functions from old

For many common functions the LATEX3 kernel will provide variants with a range of argument forms, and similarly it is expected that extension packages providing new functions will make them available in the all the commonly needed forms.

However, there will be occasions where it is necessary to construct a new such variant form; therefore the expansion module provides a straightforward mechanism for the creation of functions with any required argument type, starting from a function that takes 'normal' $T_{\rm F}X$ undelimited arguments.

To illustrate this let us suppose you have a 'base function' \demo_cmd:Nnn that takes three normal arguments, and that you need to construct the variant \demo_cmd:cnx, for which the first argument is used to construct the *name* of a command, whilst the third argument must be fully expanded before being passed to \demo_cmd:Nnn. To produce the variant form from the base form, simply use this:

```
\cs_generate_variant:Nn \demo_cmd:Nnn { cnx }
```

This defines the variant form so that you can then write, for example:

```
\demo_cmd:cnx { abc } { pq } { \rst \xyz }
```

rather than ... well, something like this!

```
\def \tempa {{pq}}%
\edef \tempb {\rst \xyz}%
\expandafter
  \demo@cmd:nnn
\csname abc%
  \expandafter
   \expandafter
   \expandafter
   \expandafter
   \expandafter
   \expandafter
   \expandafter
   \expandafter
   \tempa
```

```
\expandafter
{%
\tempb
}%
```

Another example: you may wish to declare a function \demo_cmd_b:xcxcx, a variant of an existing function \demo_cmd_b:nnnnn, that fully expands arguments 1, 3 and 5, and produces commands to pass as arguments 2 and 4 using \csname. The definition you need is simply

```
\cs_generate_variant:Nn \demo_cmd_b:nnnnn { xcxcx }
```

This extension mechanism is written so that if the same new form of some existing command is implemented by two extension packages then the two definitions will be identical and thus no conflict will occur.

5 The distribution

At present, the expl3 modules are designed to be loaded on top of IAT_EX 2_{ε} . In time, a IAT_EX3 format will be produced based on this code. This allows the code to be used in IAT_EX 2_{ε} packages *now* while a stand-alone IAT_EX3 is developed.

While expl3 is still experimental, the bundle is now regarded as broadly stable. The syntax conventions and functions provided are now ready for wider use. There may still be changes to some functions, but these will be minor when compared to the scope of expl3.

New modules will be added to the distributed version of expl3 as they reach maturity. At present, the expl3 bundle consists of a number of modules, most of which are loaded by including the line:

\RequirePackage{expl3}

in a $IATEX 2_{\varepsilon}$ package, class or other file. The expl3 modules regarded as stable, and therefore suitable for basing real code on, are as follows:

13basics This contains the basic definition modules used by the other packages.

13box Primitives for dealing with boxes.

13calc A re-implementation of the $IAT_EX 2_{\varepsilon}$ package calc package in expl3 that provides extended methods for numeric and dimensional calculations and assignments.

13clist Methods for manipulating comma-separated token lists.

- **13expan** This is the argument expansion module discussed earlier in this document.
- **13int** This implements the integer data-type **int**.
- **13intexpr** For carring out integer expression calculations and comparisons, whether the input is stored in int, tl or other variable types, or is given literally.
- 13io A module providing low level input and output functions.
- 13keys Higher-level implementation of key-value methods: intended to work as a LATEX3 version of xkeyval/kvoptions, although with input syntax more like that of pgfkeys.
- **13msg** Communicating with the user: includes low-level hooks to allow messages to be filtered (higher-level interface for filtering to be written!).
- 13names This sets up the basic naming scheme and renames all the T_{EX} primitives.
- **13num** This implements the 'fake integer' datatype num.
- **13prg** Program control structures such as boolean data type **bool**, generic do-while loops, case-switches, sorting routines and stepwise loops.
- **13prop** This implements the data-type for 'property lists' that are used, in particular, for storing key/value pairs.
- **13quark** A 'quark' is a command that is defined to expand to itself! Therefore they must never be expanded as this will generate infinite recursion; they do however have many uses, e.g. as special markers and delimiters within code.
- **13seq** This implements data-types such as queues and stacks.
- 13skip Implements the 'rubber length' datatype skip and the 'rigid length' datatype dim.
- **13t1** This implements a basic data-type, called a *token-list variable* (tl var.), used for storing named token lists: these are essentially $T_E X$ macros with no arguments.
- **13token** Analysing token lists and token streams, including peeking ahead to see what's coming next and inspecting tokens to detect which kind they are.
- $13 toks \ \mathrm{A}$ data-type corresponding to $\mathrm{T}_{\!E}\!\mathrm{X}\xspace$'s primitive token registers.

To help programmers to use IATEX3 code in existing IATEX 2_{ε} package, some short notes on making the change are probably desirable. Suggestions for inclusion here are welcome! Some of the following is concerned with code, and some with coding style.

- expl3 is mainly focussed on programming. This means that some areas still require the use of $\text{LAT}_{E}X 2_{\varepsilon}$ internal macros. For example, you may well need $\0ifpackageloaded$, as there is currently no native $\text{LAT}_{E}X3$ package loading module.
- User level macros should be generated using the mechanism available in the xparse package, which is available from CTAN or the LATEX3 SVN repository.
- At an internal level, most functions should be generated \long (using \cs_new:Npn) rather than 'short' (using \cs_new_nopar:Npn). The exceptions are:
 - Functions which take no arguments;
 - Functions which are used with pre-set arguments which therefore cannot be **\long**: this is mainly the case with auxiliary functions.
- Where possible, declare all variables and functions (using \cs_new:Npn, \tl_new:N, etc.) before use.
- Prefer 'higher-level' functions over 'lower-level', where possible. So for example use \cs_if_exist:N(TF) over \if_cs_exist:N.
- Use space to make code readable. In general, we recommend a layout such as:

```
\cs_new:Npn \foo_bar:Nn #1#2 {
   \cs_if_exist:NTF #1 {
      \foo_bar_aux_i:n {#2}
   }{
      \foo_bar_aux_ii:nn {#2} { literal }
   }
}
```

where spaces are used around { and } except for isolated #1, #2, etc.

- Put different code items on separate lines: readablity is much more useful than compactness.
- Use long, descriptive names for functions and variables, and for auxilliary functions use the parent function name plus aux, aux_i, aux_ii and so on.
- If in doubt, ask the team via the LaTeX-L list: someone will soon get back to you!

References

- [1] Donald E Knuth The T_EXbook. Addison-Wesley, Reading, Massachusetts, 1984.
- [2] Goossens, Mittelbach and Samarin. The LATEX Companion. Addison-Wesley, Reading, Massachusetts, 1994.

- [3] Leslie Lamport. LATEX: A Document Preparation System. Addison-Wesley, Reading, Massachusetts, second edition, 1994.
- [4] Frank Mittelbach and Chris Rowley. 'The LATEX3 Project'. TUGboat, Vol. 18, No. 3, pp. 195–198, 1997.

6.1 expl3 implementation

Well, it's not complicated :)

 $<^{*}$ package>

```
1 \ProvidesExplPackage
2 {\filename}{\filedate}{\fileversion}{\filedescription}
```

We already loaded I3names at the beginning of the dtx file.

The l3chk package is omitted since it is only used for conditional processing with full error-checking turned on. Most users will generally not need to do this, and we haven't set it up yet, anyway.

Fundamentals:

```
3 \RequirePackage{
```

- 4 13basics,
- 5 13expan,
- 6 13t1,
- 7 13num,
- 8 13intexpr,
- 9 13quark,
- 10 13seq,
- 11 13toks,
- 12 **13int**,
- 13 **13prg**,
- 13 10prg, 14 13clist,
- 14 13C11St, 15 13token,
- 15 ISCOKEII
- 16 **13io**,
- 17 **13prop**,
- 18 **13msg**,
- 19 **13skip**,

20 }

All the rest:

- 21 \RequirePackage{
- 22 **13box**,
- 23 13keyval,
- 24 13keys,
- 25 13precom,
- 26 13calc,

27 l3xref, 28 l3file 29 }

</package>