Customizing L_YX: Features for the Advanced User

by the L_YX Team^{*}

Version 2.4.x

May 13, 2024

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1. Introduction

This manual covers the customization features present in LyX. In it, we discuss issues like keyboard shortcuts, screen previewing options, printer options, sending commands to LyX via the LyX Server, internationalization, installing new Lex classes and LyX layouts, etc. We can't possibly hope to touch on everything you can change—our developers add new features faster than we can document them—but we will explain the most common customizations and hopefully point you in the right direction for some of the more obscure ones.

2. L_YX configuration files

This chapter aims to help you to find your way through the L_YX configuration files. Before continuing to read this chapter, you should find out where your L_YX system and user directories are by using HELP \triangleright ABOUT LYX. The system directory is the place where L_YX places its system-wide configuration files; the user directory is where you can place your modified versions. We will call the former LyXDir and the latter USERDIR in the remainder of this document.

2.1. What's in LyXDir?

LyXDir and its sub-directories contain a number of files that can be used to customize L_YX 's behavior. You can change many of these files from within L_YX itself through the TOOLS \triangleright PREFERENCES dialog. Most customization that you will want to do in L_YX is possible through this dialog. However, many other inner aspects of L_YX can be customized by modifying the files in L_YXDir . These files fall in different categories, described in the following subsections.

2.1.1. Automatically generated files

The files found in USERDIR are generated when you configure L_YX . They contain various default values that are automatically detected during reconfiguration. In general, it is not a good idea to modify them, since they might be overwritten at any time.

lyxrc.defaults Contains defaults for various commands.

- packages.lst Contains the list of packages that have been recognized by LYX. It is currently unused by the LYX program itself, but the information extracted, and more, is made available with $\text{HELP} \triangleright \text{LATEX}$ CONFIGURATION.
- $\label{eq:textclass.lst} \begin{array}{l} \mbox{The list of text classes that have been found in your layout/directories, along with the associated <math display="inline">\mbox{LAT}_{E}X$ document class and their description.

lyxmodules.lst The list of layout modules found in your layout/ directories

```
files.lst Lists of various sorts of PT_EX-related files found on your system
```

doc/EEXConfig.lyx is automatically generated during configuration from the file EEXConfig.lyx.in. It contains information on your LATEX configuration.

2.1.2. Directories

The following directories in LyXDir can be duplicated in UserDir. If a particular file exists in both places, the one in UserDir will be used.

- bind/ This directory contains files with the extension .bind that define the keybindings used in L_YX. If there exists an internationalized version of the bind file in a subdirectory bind/xx where "xx" is the ISO language code, that will be used first.
- citeengines/ Contains files with the extension .citeengine which define the diverse citation possibilities (natbib, biblatex etc.). See sec. 5.2.6 for details.
- clipart/ Contains graphics files that can be included in documents.
- doc/ Contains LyX documentation files (including the one you are currently reading). The file LaTexConfig.lyx deserves special attention, as noted above. The internationalized help docs are in subdirectories doc/xx where "xx" is the ISO language code. See chapter 4 for details.
- examples/ Contains example files that explain how to use some features. In the file browser, press the EXAMPLES button to get there.
- images/ Contains image files that are used by the DOCUMENT dialog. In addition, it also contains the individual icons used in the toolbar and the banners that can be shown when LYX is launched.
- kbd/ Contains keyboard keymapping files. See sec. 4.2 for details.
- layouts/ Contains the text class and module files described in chapter 5.
- lyx2lyx Contains the lyx2lyx Python scripts used to convert between L_YX versions. These can be run from the command line if you want to batch-convert files.
- scripts/ Contains some files that demonstrate the capabilities of the EXTER-NAL TEMPLATE feature. Also contains some scripts used by L_YX itself.
- templates/ Contains the standard LyX template files described in sec. 5.2.4.
- ui/ Contains files with the extension .ui that define the user interface to L_YX. That is, the files define which items appear in which menus and the items appearing on the toolbar.
- xtemplates/ Contains files with the extension .xtemplate which define the templates for the insertion of external material to a LYX document; see chapter 6.

2.1.3. Files you don't want to modify

These files are used internally by L_YX and you generally do not need to modify them unless you are a developer.

- **CREDITS** This file contains the list of L_YX developers. The contents are displayed with the menu entry HELP \triangleright ABOUT L_YX .
- chkconfig.ltx This is a LATEX script used during the configuration process. Do not run directly.
- configure.py This is a Python script that is used to re-configure L_YX. It creates configuration files in the directory it was run from.

2.1.4. Other files needing a line or two

- **encodings** This contains tables describing how different character encodings can be mapped to Unicode
- languages This file contains a list of all the languages currently supported by LyX.
- latexfonts Contains information about the supported fonts.
- layouttranslations This file contains translations for internationalized paragraph styles (see sec. 5.3.8).
- unicodesymbols This file contains information about Unicode-encoded glyphs and the way they are supported by $L\gamma X$ via PT_EX .

2.2. Your local configuration directory

Even if you are using L_YX as an unprivileged user, you might want to change L_YX configuration for your own use. The UserDir directory contains all your personal configuration files. This is the directory described as "user directory" in HELP \triangleright ABOUT LYX. This directory is used as a mirror of LyXDir, which means that every file in UserDir is a replacement for the corresponding file in LyXDir. Any configuration file described in the above sections can be placed either in the system-wide directory, in which case it will affect all users, or in your local directory for your own use.

To make things clearer, let's provide a few examples:

- The preferences set in the TOOLS ▷ PREFERENCES dialog are saved to a file preferences in UserDir.
- When you reconfigure using TOOLS ▷ RECONFIGURE, L_YX runs the configure.py script, and the resulting files are written in your local configuration directory. This means that any additional text class file that you might have added in UserDir/layouts will be added to the list of classes in the DOCUMENT ▷ SETTINGS dialog.

• If you get some updated documentation from a L_YX ftp site and cannot install it because you do not have sysadmin rights on your system, you can just copy the files to UserDir/doc/ and the items in the HELP menu will open them!

2.3. Running L_YX with multiple configurations

The configuration freedom of the local configuration directory may not suffice if you want to have more than one configuration at your disposal. For example, you may want to use different key bindings or printer settings at different times. You can achieve this by having several such directories. You then specify which directory to use at run-time.

Invoking L_YX with the command line switch -userdir < some directory> instructs the program to read the configuration from that directory, and not from the default directory. (You can determine the default directory by running L_YX without the -userdir switch.) If the specified directory does not exist, L_YX offers to create it for you, just like it does for the default directory the first time you run the program. You can modify the configuration options in this additional user directory exactly as you would for the default directory. These directories are completely independent (but read on). Note that setting the environment variable LYX_USERDIR_24x to some value has exactly the same effect.

Having several configurations also requires more maintenance: if you want to add a new layout to NewUserDir/layouts which you want available from all your configurations, you must add it to each directory separately. You can avoid this with the following trick: after L_YX creates the additional directory, most of the subdirectories (see above) are empty. If you want the new configuration to mirror an existing one, replace the empty subdirectory with a symbolic link to the matching subdirectory in the existing configuration. Take care with the doc/ subdirectory, however, since it contains a file written by the configuration script (also accessible through TOOLS \triangleright RECONFIGURE) which is configuration specific.

3. The Preferences dialog

All options of the preferences dialog are described in the Appendix *The Preferences Dialog* in the *User's Guide*. For some options you might find here more details.

3.1. Formats

The first step is to define your file formats if they are not already defined. To do so, open the TOOLS \triangleright PREFERENCES dialog. Under FILE HANDLING \triangleright FILE FORMATS press the NEW button to define your new format. The FORMAT field contains the name used to identify the format in the GUI. The SHORT NAME is used to identify the format internally. You will also need to enter a file extension. These are all required. The optional SHORTCUT field is used to provide a keyboard shortcut on the menus. (For example, pressing CTRL+D will DOCUMENT \triangleright VIEW (OTHER FORMATS) \triangleright DVI.)

A Format can have a VIEWER and an EDITOR associated with it. For example, you might want to use GHOSTVIEW to view PostScript files. You can enter the command needed to start the program in the corresponding fields. In defining this command, you can use the four variables listed in the next section. The viewer is launched when you view an image in LYX or use the DOCUMENT \triangleright VIEW menu. The editor is for example launched when you right-click on an image and choose EDIT EXTERNALLY in the appearing context menu.

The MIME type of a format is optional, but if it is specified, it must be unique across all formats. It is used to detect files of this format from the file contents. For some important file formats there is no MIME type officially registered with the IANA. Therefore L_{YX} uses the extended list of MIME types as specified by freedesktop.org.

The DOCUMENT FORMAT option tells LyX that a format is suitable for document export. If this is set and if a suitable conversion route exists (see sec. 3.3), the format will appear in the FILE \triangleright EXPORT menu. The format will also appear in the DOCUMENT \triangleright VIEW menu if a viewer is specified for the format. Pure image formats, such as **png**, should not use this option. Formats that can both represent vector graphics and documents like **pdf** should use it.

The option VECTOR GRAPHICS FORMAT tells L_YX that a format can contain vector graphics. This information is used to determine the target format of included graphics for PDFLATEX export. Included graphics may need to be converted to either PDF, PNG, or JPG, since PDFLATEX cannot handle other image formats. If an included graphic is not already in PDF, PNG, or JPG format, it is converted to PDF if the

vector format option is set, and otherwise to PNG.

3.2. Copiers

Since all conversions from one format to another take place in L_YX's temporary directory, it is sometimes necessary to modify a file before copying it to the temporary directory in order that the conversion may be performed.¹ This is done by a Copier: It copies a file to (or from) the temporary directory and may modify it in the process.

The definitions of the copiers may use eight variables:

\$\$s	The LYX system directory (e.g. $/USR/SHARE/LYX$).
\$\$i	The input file
\$\$0	The output file
\$\$b	The base name (without filename extension) in the LyX temporary directory
\$\$p	The full directory path of the LYX temporary directory
\$\$r	The full pathname to the original LyX file being processed
\$\$f	The filename (without any directory path) of the LyX file.
\$\$1	The ' $I_{E}X$ name'

Copiers can be used to do almost anything with output files. For example, suppose you want generated pdf files to be copied to a special directory, /home/you/pdf/. Then you could write a shell script such as this one:

#!/bin/bash
FROMFILE=\$1
TOFILE=`basename \$2`
cp \$FROMFILE /home/you/pdf/\$TOFILE

Save it in your local L_YX directory—say, /home/you/.lyx/scripts/pdfcopier.sh and make it executable, if you need to do so on your platform. Then, in the TOOLS > PREFERENCES dialog, select under FILE HANDLING > FILE FORMATS the PDF(PDFLATEX) format—or one of the other pdf formats—and enter pdfcopier.sh \$\$i \$\$o into the COPIER field.

Copiers are used by L_YX in various of its own conversions. For example, if appropriate programs are found, L_YX will automatically install copiers for the HTML

¹For example, the file may refer to other files—images, for example—using relative file names, and these may become invalid when the file is copied to the temporary directory.

and HTML (MS WORD) formats. When these formats are exported, the copier sees that not just the main HTML file but various associated files (style files, images, etc.) are also copied. All these files are written to a subdirectory of the directory in which the original LyX file was found.²

3.3. Converters

You can define your own Converters to convert files between different formats. This is done in the TOOLS \triangleright PREFERENCES \triangleright FILE HANDLING \triangleright CONVERTERS dialog.

To define a new converter, select the FROM FORMAT and TO FORMAT from the drop-down lists, enter the command needed for the conversion, and then press the ADD button. Several variables can be used in the definition of converters:

\$\$s	The L _Y X system directory		
\$\$i	The input file		
\$\$0	The output file		
\$\$b	The base filename of the input file (i.g., without the extension)		
\$\$p	The path to the input file		
\$\$r	The path to the original input file (this is different from \$\$p when a chain of converters is called)		
\$\$e	The iconv name for the encoding of the document.		
In the EXTRA FLAG field you can enter the following flags, separated by commas:			

- latex=flavor This converter runs some form of LATEX. This will make LYX's LATEX
 error logs available. The optional flavor value specifies the form of LATEX
 that is run (latex, pdflatex, platex, xetex, luatex). If no value
 is specified, latex is used.
- needauth This converter is considered non-safe and needs authorization by the user. Depending on the settings in Tools⊳ Preferences⊳ File Handling⊳ Converters, users will (a.) be asked whether they trust the current document temporarily, permanently, or not, (b.) be informed that conversion is not possible due to security concerns, or (c.) not be informed as they gave permanent consent. Set this flag for converters that might execute arbitrary programs.

²This copier can be customized. The optional "-e" argument takes a comma-separated list of extensions to be copied; if it is omitted, all files will be copied. The "-t" argument determines the extension added to the generated directory. By default, it is "LYXCONV", so HTML generated from /PATH/TO/FILENAME.LYX will end up in /PATH/TO/FILENAME.HTML.LYXCONV.

- needaux=flavor Needs the LATEX .AUX file for the conversion. The optional flavor value specifies the form of LATEX that is run in order to generate the .AUX file (latex, pdflatex, platex, xetex, luatex). If no value is specified, latex is used.
- xml Output is XML.

The following three flags are not really flags at all because they take an argument in the KEY = VALUE format:

- hyperref-driver The name of the driver that needs to be loaded with the hyperref package for this converter. The loading of the correct driver is necessary to get some PDF-specific features. See the hyperref manual for details.
- parselog If set, the converter's standard error will be redirected to a file infile.out, and the script given as argument will be run as: script < infile.out > infile.log. The argument may contain \$\$s.
- resultdir The name of the directory in which the converter will dump the generated files. L_YX will not create this directory, and it does not copy anything into it, though it will copy this directory to the destination. The argument may contain \$\$b, which will be replaced by the base name of the input and output files, respectively, when the directory is copied. Note that resultdir and usetempdir make no sense together. The latter will be ignored if the former is given.
- resultfile Determines the output file name and may, contain \$\$b. Sensible only with resultdir and optional even then; if not given, it defaults to 'index'.

A suitable hyperref-driver is set for some converters that are installed with L_YX. The last three flags, however, are presently not used in any of the pre-installed converters.

You do not have to define converters for all formats between which you want to convert. For example, you will note that there is no 'L_YX to PostScript' converter, but L_YX will export PostScript. It does so by first creating a $L^{A}T_{E}X$ file (no converter needs to be defined for this) which is then converted to DVI using the 'L^AT_EX to DVI' converter, and finally converting the resulting DVI file to PostScript. L_YX finds such 'chains' of converters automatically, and it will always choose the shortest possible chain. You can, though, still define multiple conversion methods between file formats. For example, the standard L_YX configuration provides five ways to convert L^AT_EX to PDF:

- 1. Directly, using PDFLATEX
- 2. via (DVI and) PostScript, using PS2PDF

- 3. via DVI, using DVIPDFM
- 4. directly using $X \in T_E X$
- 5. directly using $LuaT_EX$

To define such alternate chains, you must define multiple target 'file formats', as described in sec. 3.1. For example, in the standard configuration, the formats named PDF (for PS2PDF), PDF2 (for PDFLATEX), PDF3 (for DVIPDFM), PDF4 (for XET_EX), and PDF5 (for LUAT_EX) are defined, all of which share the extension .PDF, and which correspond to the conversion methods just mentioned.

4. Internationalizing L_YX

L_YX supports using a translated interface. Last time we checked, L_YX provided text in thirty languages. The language of choice is called your *locale*. (For further reading on locale settings, see also the documentation for locale that comes with your operating system. For Linux, the manual page for locale(5) could be a good place to start).

Notice that these translations will work, but do contain a few flaws. In particular, all dialogs have been designed with the English text in mind, which means that some of the translated text will be too large to fit within the space allocated. This is only a display problem and will not cause any harm. Also, you will find that some of the translations do not define shortcut keys for everything. Sometimes, there are simply not enough free letters to do it. Other times, the translator just hasn't got around to doing it yet. Our localization team, which you may wish to join,¹ will of course try to fix these shortcomings in future versions of L_{YX} .

4.1. Translating L_YX

4.1.1. Translating the graphical user interface (text messages).

L_YX uses the GNU gettext library to handle the internationalization of the interface. To have L_YX speak your favorite language in all menus and dialogs, you need a po-file for that language. When this is available, you'll have to generate a mo-file from it and install the mo-file. The process of doing all of this is explained in the documentation for GNU gettext. It is possible to do this just for yourself, but if you're going to do it, you might as well share the results of your labors with the rest of the L_YX community. Send a message to the L_YX developers' list for more information about how to proceed.

In short, this is what you should do (xx denotes the language code):

- Check out the LyX source code. (See the information on the web.)
- Copy the file lyx.pot to the folder of the ******.po files. Then rename it to xx.po. (If lyx.pot doesn't exist anywhere, it can be remade with the console command **make lyx.pot** in that directory, or you can use an existing po-file for some other language as a template).

 $^{^{1}}$ If you are a fluent speaker of a language other than English, joining these teams is a great way to give back to the L_YX community!

4. Internationalizing L_YX

• Edit xx.po.² For some menu- and widget-labels, there are also shortcut keys that should be translated. Those keys are marked after a '|', and should be translated according to the words and phrases of the language. You should also fill also out the information at the beginning of the new po-file with your email-address, etc., so people know where to reach you with suggestions and entertaining flames.

If you are just doing this on your own, then:

- Generate xx.mo. This can be done with msgfmt -o xx.mo < xx.po.
- Copy the mo-file to your locale-tree, at the correct directory for application messages for the language xx, and under the name lyx.mo (e.g. /usr/local/share/locale/xx/L

As said, however, it would be best if the new po file could be added to the L_YX distribution, so others can use it. Adding it involves making additional changes to L_YX . So send an email to the developers' mailing list if you're interested in doing that.

4.1.1.1. Ambiguous messages

Sometimes it turns out that one English message needs to be translated into different messages in the target language. One example is the message To which has the German translation Nach or Bis, depending upon exactly what the English "to" means. GNU gettext does not handle such ambiguous translations. Therefore you have to add some context information to the message: Instead of To it becomes To[[as in 'From format x to format y']] and To[[as in 'From page x to page y']]. Now the two occurrences of To are different for gettext and can be translated correctly to Nach and Bis, respectively.

Of course the context information needs to be stripped off the original message when no translation is used. Therefore you have to put it in double square brackets at the end of the message (see the example above). The translation mechanism of L_YX ensures that everything in double square brackets at the end of messages is removed before displaying the message.

4.1.2. Translating the documentation.

The online documentation (in the HELP-menu) can (and should!) be translated. If there are translated versions of the documentation available³ and the locale is set accordingly, these will be used automagically by L_YX . L_YX looks for translated

²This is just a text file, so it can be edited in any text editor. But there are also specialized programs that support such editing, such as Poedit (for all platforms) or KBabel (for KDE). Emacs contains a 'mode' for editing po files, as well, see https://www.gnu.org/software/gettext/manual/html_node/PO-Mode.html#PO-Mode.

 $^{^3\}mathrm{As}$ of March 2008, at least some of the documents have been translated into fourteen languages, with the Tutorial available in a few more.

versions as LyXDir/doc/xx/DocName.lyx, where xx is the code for the language currently in use. If there are no translated documents, the default English versions will be displayed. Note that the translated versions must have the same filenames (DocName above) as the original. If you feel up to translating the documentation (an excellent way to proof-read the original documentation by the way!), there are a few things you should do right away:

• Check out the documentation translation web page at https://www.lyx.org/Translation. That way, you can find out which (if any) documents have already been translated into your language. You can also find out who (if anyone) is organizing the effort to translate the documentation into your language. If no one is organizing the effort, please let us know that you're interested.

Once you get to actually translating, here's a few hints for you that may save you trouble:

- Join the documentation team! There is information on how to do that in Intro.lyx (HELP > INTRODUCTION), which by the way is the first document you should translate.
- Learn the typographic conventions for the language you are translating to. Typography is an ancient art and over the centuries, a great variety of conventions have developed throughout different parts of the world. Also study the professional terminology amongst typographers in your country. Inventing your own terminology will only confuse the users. (Warning! Typography is addictive!)
- Make a copy of the document. This will be your working copy. You can use this as your personal translated help-file by placing it in your UserDir/doc/xx/ directory.Note: For a complex document with external material (images, etc.), if you make a copy e.g. in a temp dir, beware that the links to external material may be broken when the document is moved to a different place. The best way is to retrieve the L_YX tree from git (see https://www.lyx.org/HowToUseGIT) and to edit the doc file in place.
- Sometimes the original document (from the LyX team) will be updated. Use the source viewer at https://www.lyx.org/trac/timeline to see what has been changed. That way you can easily see which parts of the translated document need to be updated.

If you ever find an error in the original document, fix it and notify the rest of the documentation team of the changes! (You didn't forget to join the documentation team, did you?)

4.2. International Keymap Stuff

The next two sections describe the .kmap and .cdef file syntax in detail. These sections should help you design your own key map if the ones provided do not meet

your needs.

4.2.1. The .kmap File

A .kmap file maps keystrokes to characters or strings. As the name suggests, it sets a keyboard mapping. The .kmap file keywords kmap, kmod, kxmod, and kcomb are described in this section.

kmap Map a character to a string

\kmap char string

This will map *char* to *string*. Note that in *string*, the double-quote (") and the backslash (\backslash) must be escaped with a preceding backslash (\backslash).

An example of a KMAP statement to cause the symbol / to be output for the keystroke & is:

\kmap & /

kmod Specify an accent character

\kmod char accent allowed

This will make the character *char be an accent* on the *allowed* character(s). This is the dead key⁴ mechanism.

If you hit *char* and then another key not in *allowed*, you will get a *char* followed by the other, not allowed key, as output. Note that a BACKSPACE cancels a dead key, so if you hit *char* BACKSPACE, the cursor will not go one position backwards but will instead cancel the effect that *char* might have had on the next keystroke.

The following example specifies that the character ' is to be an acute accent, allowed on the characters a, e, i, o, u, A, E, I, O, and U:

\kmod ' acute aeiouAEIOU

kxmod Specify an exception to the accent character

\kxmod accent char result

This defines an exception for *accent* on *char*. The *accent* must have been assigned a keystroke with a previous \kmod declaration and *char* must not belong in the *allowed* set of *accent*. When you enter the *accent char* sequence, *result* is produced. If such a declaration does not exist in the .kmap file and you enter *accent char*, you get *accent_key char* where *accent_key* is the first argument of the \kmod declaration.

The following command produces causes äi to be produced when you enter acute-i ('i):

⁴The term *dead key* refers to a key that does not produce a character by itself, but when followed with another key, produces the desired accent character. For example, a German character with an umlaut like \ddot{a} can be produced in this manner.

\kxmod acute i "\\'{\\i}"

kcomb Combine two accent characters

\kcomb accent1 accent2 allowed

This one is getting pretty esoteric. It allows you to combine the effect of accent1 and accent2 (in that order!) on allowed chars. The keystrokes for accent1 and accent2 must have been set with a \mbox{kmod} command at a *previous* point in the file.

Consider this example from the greek.kmap file:

\kmod ; acute aeioyvhAEIOYVH \kmod : umlaut iyIY \kcomb acute umlaut iyIY

This allows you to press ;: I and get the effect of \'{\"{i}}. A backspace in this case cancels the last dead key, so if you press ;: BACKSPACE I you get \'{i}.

4.2.2. The .cdef File

After the .kmap mapping is performed, a .cdef file maps the strings that the symbols generate to characters in the current font. The LyX distribution currently includes at least the iso8859-1.cdef and iso8859-2.cdef files.

In general the .cdef file is a sequence of declarations of the form

char_index_in_set string

For example, in order to map $\' \{E\}$ to the corresponding character in the iso-8859-1 set (233), the following declaration is used

```
233 "\\'{e}"
```

with $\$ and " being escaped in *string*. Note that the same character can apply to more than one string. In the iso-8859-7.cdef file you have

192 "\\'{\\\"{i}}" 192 "\\\"{\\'{i}}"

If L_YX cannot find a mapping for the string produced by the keystroke or a deadkey sequence, it will check if it looks like an accented char and try to draw an accent over the character on screen.

4.2.3. Dead Keys

There is a second way to add support for international characters through so-called dead-keys. A dead-key works in combination with a letter to produce an accented character. Here, we'll explain how to create a really simple dead-key to illustrate how they work.

Suppose you happen to need the circumflex character, "^". You could bind the ^-key [a.k.a. SHIFT-6] to the L_YX command accent-circumflex in your lyxrc file. Now, whenever you type the ^-key followed by a letter, that letter will have a circumflex accent on it. For example, the sequence "^E" produces the letter: "ê". If you tried to type "^T", however, L_YX will complain with a beep, since a "T" never takes a circumflex accent. Hitting SPACE after a dead-key produces the bare-accent. Please note this last point! If you bind a key to a dead-key, you'll need to rebind the character on that key to yet another key. Binding the ,-KEY to a cedilla is a bad idea, since you'll only get cedillas instead of commas.

One common way to bind dead-keys is to use META-, CTRL-, and SHIFT- in combination with an accent, like "~" or "," or "^". Another way involves using xmodmap and xkeycaps to set up the special Mode_Switch key. The Mode_Switch acts in some ways just like SHIFT and permits you to bind keys to accented characters. You can also turn keys into dead-keys by binding them to something like usldead_cedilla and then binding this symbolic key to the corresponding L_YX command.⁵ You can make just about anything into the Mode_Switch key: One of the CTRL- keys, a spare function key, etc. As for the L_YX commands that produce accents, check the entry for accent-acute in the *Reference Manual*. You'll find the complete list there.

4.2.4. Saving your Language Configuration

You can edit your preferences so that your desired language environment is automatically configured when LyX starts up, via the $EDIT \triangleright PREFERENCES$ dialog.

⁵Note from JOHN WEISS: This is exactly what I do in my ~/.lyx/lyxrc and my ~/.xmodmap files. I have my SCROLL LOCK key set up as Mode_Shift and a bunch of these "usldead_*" symbolic keys bound such things as SCROLL LOCK-^ and SCROLL LOCK-~. This is how I produce my accented characters.

5. Creating and Installing New Document Classes, Layouts, and Templates

In this chapter, we describe the procedures for creating and installing new L_{YX} layout and template files, as well as offer a refresher on correctly installing new L_{TEX} document classes.

First, let us a say a few words about how one ought to think about the relation between L_YX and L^AT_EX. The thing to understand is that, in a certain sense, L_YX doesn't know anything about L^AT_EX. Indeed, from L_YX's point of view, L^AT_EX is just one of several "backend formats" in which it is capable of producing output. Other such formats are DocBook, plaintext, and XHTML. L^AT_EX is, of course, a particularly important format, but very little of the information L_YX has about L^AT_EX is actually contained in the program itself.¹ Rather, that information, even for the standard classes like article.cls, is contained in 'layout files'. Similarly, L_YX itself does not know much about DocBook or XHTML. What it knows is contained in layout files.

You can think of the layout file for a given document class as a translation manual between L_YX constructs—paragraphs with their corresponding styles, certain sorts of insets, etc—and the corresponding $\mathbb{L}T_EX$, DocBook, or XHTML constructs. Almost everything L_YX knows about article.cls, for example, is contained in the file article.layout and in various other files it includes. For this reason, anyone intending to write layout files should plan to study the existing files. A good place to start is with stdsections.inc, which is included in article.layout, book.layout, and many of the other layout files for document classes. This file is where sections and the like are defined: stdsections.inc tells L_YX how paragraphs that are marked with the Section, Subsection, etc, styles can be translated into corresponding LAT_EX, DocBook, and XHTML commands and tags. The article.layout file basically just includes several of these std*.inc files.

Defining the L_YX - L^AT_EX correspondence is not the only thing layout files do, though. Their other job is to define how the L_YX constructs themselves will appear on-screen. The fact that layout files have these two jobs is often a source of confusion, because they are completely separate. Telling L_YX how to translate a certain paragraph style into L^AT_EX does not tell L_YX how to display it; conversely, telling L_YX how to display a certain paragraph style does not tell L_YX how to translate it

¹Some commands are sufficiently complex that they are "hardcoded" into L_YX. But the developers generally regard this as a Bad Thing.

into $\[AT_EX \]$ (let alone tell $\[AT_EX \]$ how to display it). So, in general, when you define a new LYX construct, you must always do two quite separate things: (i) tell LYX how to translate it into $\[AT_EX \]$ and (ii) tell LYX how to display it.

Much the same is true, of course, as regards LyX's other backend formats, though XHTML is in some ways different, because in that case LyX *is* able, to some extent, to use information about how it should display a paragraph on the screen to output information (in the form of CSS) about how the paragraph should be displayed in a browser. Even in this case, however, the distinction between what LyX does internally and how things are rendered externally remains in force, and the two can be controlled separately. See sec. 5.4 for the details.

5.1. Installing new LATEX files

Some installations may not include a LAT_EX package or class file that you would like to use within L_YX. For example, you might need FoilT_EX, a package for preparing slides for overhead projectors. Modern LAT_EX distributions like T_EXLive (2008 or newer) or MiKT_EX provide a user interface for installing such packages. For example, with MiKT_EX, you start the program "Package Manager" to get a list of available packages. To install one of them, right click on it or use the corresponding toolbar button.

If your LATEX distribution does not provide such a 'package manager', or if the package is not available from your distribution, then follow these steps to install it manually:

- 1. Get the package from CTAN or wherever.
- 2. If the package contains a file with the ending ".ins" (is the case for FoilT_EX) then open a console, change to the folder of this file and execute the command latex foiltex.ins. You have now unpacked the package and have all files to install it. Most LAT_EX-packages are not packed and you can skip this step.
- 3. Now you need to decide if the package should be available for all users or only for you.
 - a) On *nix systems (Linux, OSX, etc.), if you want the new package to be available for all users on your system, then install it in your 'local' T_EX tree, otherwise install it in your own 'user' T_EX tree. Where these trees should be created, if they do not already exist, depends on your system. To find this out, look in the file texmf.cnf.² The location of the 'local' T_EX tree is defined by the TEXMFLOCAL variable; this is usually somewhere like /usr/local/share/texmf or /usr/local/texlive/XXXX where XXXX is the year of the installed T_EXLive distribution. The location of the

²This is usually in the directory **\$TEXMF/web2c**, though you can execute the command **kpsewhich** texmf.cnf to locate it.

'user' T_EX tree is defined by TEXMFHOME and is commonly \$HOME/texmf or \$HOME/.texliveXXXX. (If these variables are not predefined, you have to define them.) You'll probably need root permissions to create or modify the 'local' tree, but not for your 'user' tree.

In general, it is recommended to install in the user tree because your user will not be modified or even overwritten when you upgrade your system. It will typically also be backed up together with everything else when you backup your home directory (which, of course, you do on a regular basis).

b) On Windows, if you want the new package to be available for all users on your system, change to the folder where LATEX is installed and then change to the subfolder ~\tex\latex. (For MiKTEX, this would be by default the folder ~:\Programs\MiKTeX\tex\latex.)³ Create there a new folder foiltex and copy all files of the package into it.

If the package should only available for you or you don't have admin permissions, do the same, but in the local LAT_EX folder. E. g., for MiKTEX 2.8 under Windows XP, this would be the folder:

~:\Documents and Settings\<username>\Application Data\ MiKTeX\2.8\tex\latex

On Vista, it would be:

~:\Users\<username>\AppData\Roaming\2.8\MiKTeX\tex\latex

- - a) For T_EXLive execute the command texhash from a console. If you installed the package for all users, then you will probably need to have root permissions for that.
 - b) For MiKT_EX, if you have installed the package for all users, start the program "Settings (Admin)" and press the button marked "Refresh FNDB". Otherwise start the program "Settings" and do the same.
- 5. Finally, you need to tell LYX that there are new packages available. So, in LYX, use the menu TOOLS \triangleright RECONFIGURE and then restart LYX.

Now the package is installed. In our example, the document class FoilTex will now be available under DOCUMENT > SETTINGS > DOCUMENT CLASS (in the "Presentations" category).

If you would like to use a LATEX document class that is not even listed in the menu $DOCUMENT \triangleright SETTINGS \triangleright DOCUMENT$ CLASS, then you need to create a 'layout' file for it. That is the topic of the next section.

³Note that this will be the correct path only on English installations. On a German one, it would be ~:\Programme\MiKTeX\tex\latex, and similarly for other languages.

5.2. Types of layout files

This section describes the various sorts of L_YX files that contain layout information. These files describe various paragraph and character styles, determining how L_YX should display them and how they should be translated into L^AT_EX, DocBook, XHTML, or whatever output format is being used.

We shall try to provide a thorough description of the process of writing layout files here. However, there are so many different types of documents supported even by just LATEX that we can't hope to cover every different possibility or problem you might encounter. The LYX users' list is frequented by people with lots of experience with layout design who are willing to share what they've learned, so please feel free to ask questions there.

As you prepare to write a new layout, it is extremely helpful to look at the layouts distributed with L_YX. If you write a L_YX layout for a L_{TE}X document class that might also be used by others, or write a module that might be useful to others, then you should consider posting your layout to the layout section on the L_YX wiki or even to the L_YX developers' list, so that it might be included in L_YX itself.⁴

5.2.1. Layout modules

We have spoken to this point about 'layout files'. But there are different sorts of files that contain layout information. Layout files, strictly so called, have the .layout extension and provide LyX with information about document classes. Since LyX 1.6 layout information can also be contained in layout *modules*, which have the .module extension. Modules are to $\[mathbb{L}^{T}EX\]$ packages much as layouts are to $\[mathbb{L}^{T}EX\]$ classes, and some modules—such as the endnotes module—specifically provide support for one package. In a sense, layout modules are similar to included⁵ files—files like stdsections.inc—in that modules are not specific to a given document class but may be used with many different classes. The difference is that using an included file with article.cls requires editing that file. Modules, by contrast, are selected in the DOCUMENT \triangleright SETTINGS dialog.

Building modules is the easiest way to get started with layout editing, since it can be as simple as adding a single new paragraph style or flex inset. But modules may, in principle, contain anything a layout file can contain.

After creating a new module and copying it to the layouts/ folder, you will need to reconfigure and then restart L_YX for the module to appear in the menu. However, changes you make to the module will be seen immediately, if you open DOCUMENT \triangleright SETTINGS, highlight something, and then hit "OK". It is strongly recommended that you save your work before doing this. In fact, it is strongly recommended that you not attempt to edit modules while simultaneously working on actual documents. Though

⁴Note that L_YX is licensed under the General Public License, so any material that is contributed to L_YX must be similarly licensed.

⁵These can have any extension, but by convention have the .inc extension.

of course the developers strive to keep L_YX stable in such situations, syntax errors and the like in your module file could cause strange behavior.

5.2.1.1. Local Layout

Modules are to L_YX as packages are to L^AT_EX. Sometimes, however, you find yourself wanting a specific inset or character style just for one document and writing a module that will also be available to other documents makes little sense. What you need is L_YX's "Local Layout".

You will find it under Document \triangleright Settings \triangleright Local Layout. The large text box allows you to enter anything that you might enter in a layout file or module. You can think of a document's local layout, in fact, as a module that belongs just to it. So, in particular, you must enter a Format tag. Any format is acceptable, but one would normally use the format current at the time. (In LYX, the current layout format is .)

When you have entered something in the Local Layout pane, L_YX will enable the "Validate" button at the bottom. Clicking this button will cause L_YX to determine whether what you have entered is valid layout information for the chosen format. L_YX will report the result but, unfortunately, will not tell you what errors there might have been. These will be written to the terminal, however, if L_YX is started from a terminal. You will not be permitted to save your local layout until you have entered something valid.

The warnings at the end of the previous section apply here, too. Do not play with local layout while you are actually working, especially if you have not saved your document. That said, using local layout with a test document can be a very convenient way to try out layout ideas, or even to start developing a module.

5.2.2. Layout for .sty files

The easier case is the one in which your new document class is provided as a style file that is to be used in conjunction with an already supported document class. For the sake of the example, we'll assume that the style file is called MYCLASS.STY and that it is meant to be used with REPORT.CLS, which is a standard class.

Start by copying the existing class's layout file into your local directory:⁶

cp report.layout ~/.lyx/layouts/myclass.layout

Then edit myclass.layout and change the line:

⁶Of course, which directory is your local directory will vary by platform, and L_YX allows you to specify your local directory on startup, too, using the **-userdir** option.

```
\DeclareLaTeXClass{Report (Standard Class)}
```

to read

```
\DeclareLaTeXClass[report, myclass.sty]{Report (My Class)}
```

Then add:

Preamble \usepackage{myclass} EndPreamble

near the top of the file.

Start LYX and select TOOLS > RECONFIGURE. Then restart LYX and try creating a new document. You should see "REPORT (MY CLASS)" as a document class option in the DOCUMENT > SETTINGS dialog. It is likely that some of the sectioning commands and such in your new class will work differently from how they worked in the base class—report in this example—so you can fiddle around with the settings for the different sections if you wish. The layout information for sections is contained in stdsections.inc, but you do not need to copy and change this file. Instead, you can simply add your changes to your layout file, after the line Input stdclass.inc, which itself includes stdsections.inc. For example, you might add these lines:

```
Style Chapter
Font
Family Sans
EndFont
End
```

to change the font for chapter headings to sans-serif. This will override (or, in this case, add to) the existing declaration for the Chapter style.

Your new package may also provide commands or environments not present in the base class. In this case, you will want to add these to the layout file. See sec. 5.3 for information on how to do so.

If MYCLASS.STY can be used with several different document classes, and even if it cannot, you might find it easiest just to write a module that you can load with the base class. The simplest possible such module would be:

```
#\DeclareLyXModule{My Class}
#DescriptionBegin
#Support for myclass.sty.
#DescriptionEnd
Format
Preamble
    \usepackage{myclass}
EndPreamble
```

A more complex module might modify the behavior of some existing constructs or define some new ones. Again, see sec. 5.3 for discussion.

5.2.3. Layout for .cls files

There are two possibilities here. One is that the class file is itself based upon an existing document class. For example, many thesis classes are based upon BOOK.CLS. To see whether yours is, look for a line like

\LoadClass{book}

in the file. If so, then you may proceed largely as in the previous section, though the Declare MEXClass line will be different. If your new class is thesis and it is based upon book, then the line should read:⁷

\DeclareLaTeXClass[thesis,book]{thesis}

If, on the other hand, the new class is not based upon an existing class, you will probably have to "roll your own" layout. We strongly suggest copying an existing layout file which uses a similar LATEX class and then modifying it, if you can do so. At least use an existing file as a starting point so you can find out what items you need to worry about. Again, the specifics are covered below.

5.2.4. Creating templates

Once you have written a layout file for a new document class, you might want to consider writing a *template* for it, too. A template acts as a kind of tutorial for your layout, showing how it might be used, though containing dummy content. You can of course look at the various templates included with LYX for ideas.

Templates are created just like usual documents: using LyX. The only difference is that usual documents contain all possible settings, including the font scheme and the paper size. Usually a user doesn't want a template to overwrite his preferred settings for such parameters. For that reason, the designer of a template should remove the corresponding commands like $font_roman$ or papersize from the template LyX file. This can be done with any simple text-editor, for example vi or notepad.

Put the edited template files you create in UserDir/templates/, copy the ones you use from the global template directory in LyXDir/templates/ to the same place, and redefine the template path in the TOOLS \triangleright PREFERENCES \triangleright PATHS dialog.

Note, by the way, that there is a template which has a particular meaning: defaults.lyx. This template is loaded every time you create a new document with $FILE \triangleright NEW$ in order to provide useful defaults. To create this template from inside $L_{Y}X$, all you have to do is to open a document with the correct settings, and use the SAVE AS DOCUMENT DEFAULTS button.

⁷And it will be easiest if you save the file to thesis.layout: L_YX assumes that the document class has the same name as the layout file.

5.2.5. Upgrading old layout files

The format of layout files changes with each L_YX release, so old layout files need to be converted to the new format. If L_YX reads a layout file in an older format, it automatically calls the script layout2layout.py to convert it to a temporary file in current format. The original file is left untouched. If you use the layout file often, then, you may want to convert it permanently, so that L_YX does not have to do so itself every time. To do this, you can call the converter manually:

- 1. rename the file myclass.layout to myclass.old
- 2. Call the command python LyXDir/scripts/layout2layout.py myclass.old myclass.layout where LyXDir is the name of your LyX system directory.

Note that manual conversion does not affect included files, so these will have to be converted separately.

5.2.6. Cite engine files

A specific form of layout files are the so-called *.citeengine files that are located in the citeengines/ sub-directory. Their purpose is to define the specifics of IAT_EX packages aimed at bibliography generation, such as natbib, jurabib or biblatex, but also the way how normal BibT_EX citations (without additional packages) are handled in L_YX is defined in such a file.

More specifically, it is defined which packages L_YX needs to load, which citation commands are available, how these are to be displayed in L_YX (in the workarea, the dialogs, the context menus) as well as in the XHTML and plain text output. Furthermore, the files specify available style variants (author-year, numerical, etc.) and their specifics. The cite engine files are also used to generate the options that are available in Document \triangleright Settings \triangleright Bibliography \triangleright Style engine.

Even though a cite engine file is essentially a normal layout file that could theoretically include any layout information, it usually primarily includes some specific parameters such as MaxCiteNames, CiteFramework, CiteEngine and CiteFormat blocks. The syntax of the latter two is described in sec. 5.3.14 and sec. 5.3.15, as well as in the files themselves.

5.3. The layout file format

The following sections describe how layout files are structured and written. Our advice is to go slowly, save and test often. It is really not that hard, except that the multitude of options can become overwhelming, especially if you try to check out too many at once. It becomes easier if you use existing layouts of L_YX as examples/reference or if you modify an existing layout to your needs. Note that all the tags used in layout files are case-insensitive. This means that Style, style and StYlE are really the same tag. The possible arguments are printed in brackets after the tag's name. The default argument is typeset *emphasized*. If the argument has a data type like "string" or "float", the default is shown like this: float=default.

5.3.1. The document class declaration and classification

Lines in a layout file which begin with **#** are comments. There is one exception to this rule. All ***.layout** files should begin with lines like:

- #% Do not delete the line below; configure depends on this
- # \DeclareLaTeXClass{Article (Standard Class)}
- # \DeclareCategory{Articles}

The second and third lines are used when you (re)configure L_YX. The layout file is read by the LAT_EX script chkconfig.ltx, in a special mode where **#** is ignored. The first line is just a LAT_EX comment, the second one contains the mandatory declaration of the text class and the third line contains the optional classification of the class. If these lines appear in a file named article.layout, then they define a text class of name article (the name of the layout file) which uses the LAT_EX document class article.cls (the default is to use the same name as the layout). The string "Article (Standard Class)" that appears above is used as a description of the text class in the DOCUMENT > SETTINGS dialog. The category ("Articles" in the example) is also used in the DOCUMENT > SETTINGS dialog: the text classes are grouped by these categories (which are usually genres, so typical categories are "Articles", "Books", "Reports", "Letters", "Presentations", "Curricula Vitae" etc.). If no category has been declared, the class will be put in the "Uncategorized" group.

Let's assume that you wrote your own text class that uses the article.cls document class, but where you changed the appearance of the section headings. If you put it in a file myarticle.layout, the header of this file should be:

- #% Do not delete the line below; configure depends on this
- # \DeclareLaTeXClass[article]{Article (with My Own Headings)}
- # \DeclareCategory{Articles}

This declares a text class myarticle, associated with the LATEX document class article.cls and described as "Article (with My Own Headings)". If your text class depends on several packages, you can declare it as:

- #% Do not delete the line below; configure depends on this
- # \DeclareLaTeXClass[article,foo.sty]{Article (with My Own Headings)}
- # \DeclareCategory{Articles}

This indicates that your text class uses the foo.sty package.

Note that these declarations can also be given an optional parameter declaring the name of the document class (but not a list).

So, to be as explicit as possible, the form of the layout declaration is:

- # \DeclareLaTeXClass[class,package.sty]{layout description}
- # \DeclareCategory{category}

The class need only be specified if the name of the LAT_EX class file and the name of the layout file are different or if there are packages to load. If the name of the class file is not specified, then L_{YX} will simply assume that it is the same as the name of the layout file.

When the text class has been modified to your taste, all you have to do is to copy it either to LyXDir/layouts/ or to UserDir/layouts, run TOOLS \triangleright RECONFIGURE, exit LYX and restart. Then your new text class should be available along with the others.

Once the layout file is installed, you can edit it and see your changes without having to reconfigure or to restart L_YX .⁸ You can force a reload of the current layout by using the L_YX function LAYOUT-RELOAD. There is no default binding for this function—though, of course, you can bind it to a key yourself. But you will normally use this function simply by entering it in the mini-buffer.

Warning: LAYOUT-RELOAD is very much an 'advanced feature'. It is *strongly* recommended that you save your work before using this function. In fact, it is *strongly* recommended that you not attempt to edit layout information while simultaneously working on a document that you care about. Use a test document. Syntax errors and the like in your layout file could cause peculiar behavior. In particular, such errors could cause L_YX to regard the current layout as invalid and to attempt to switch to some other layout.⁹ The L_YX team strives to keep L_YX stable in such situations, but safe is better than sorry.¹⁰

5.3.2. The Module declaration

A module must begin with a line like the following:

#\DeclareLyXModule[endnotes.sty]{Endnotes}
#\DeclareCategory{Foot- and Endnotes}

The mandatory argument of \DeclareLyXModule , in curly brackets, is the name of the module, as it should appear in DOCUMENT > SETTINGS > MODULES. The argument in square brackets is optional: It declares any IAT_EX packages on which the

⁸In versions of L_YX prior to 1.6, this was not true. As a result, editing layout files was very time consuming, since you had constantly to restart L_YX to see changes.

 $^{^{9}}$ Really bad syntax errors may even caused L_YX to exit. This is because certain sorts of errors may make L_YX unable to read *any* layout information. Please be careful.

 $^{^{10}\}mathrm{While}$ we're giving advice: make regular backups. And be nice to your mother.

module depends. It is also possible to use the form FROM->TO as an optional argument, which declares that the module can only be used when there exists a conversion chain between the formats 'from' and 'to'. The \DeclareCategory declaration is not strictly mandatory, but you should add it, since it is helpful to find the module. Please have a look at the existing module categories and if appropriate, use one of those.

The module and category declaration should then be followed by lines like the following: 11

```
#DescriptionBegin
```

#Adds an endnote command, in addition to footnotes. #You will need to add \theendnotes in TeX code where you #want the endnotes to appear. #DescriptionEnd #Requires: somemodule | othermodule #Excludes: badmodule

The description is used in DOCUMENT \triangleright SETTINGS \triangleright MODULES to provide the user with information about what the module does. The **Requires** line is used to identify other modules with which this one must be used; the **Excludes** line is used to identify modules with which this one may not be used. Both are optional, and, as shown, multiple modules should be separated with the pipe symbol: |. Note that the required modules are treated disjunctively: *at least one* of the required modules must be used. Similarly, *no* excluded module may be used. Note that modules are identified here by their filenames without the .module extension. So somemodule is really somemodule.

5.3.3. The CiteEngine file declaration

A cite engine file must begin with a line like the following:

```
#\DeclareLyXCiteEngineModule[biblatex.sty]{Biblatex}
```

The mandatory argument, in curly brackets, is the name of the cite style, as it should appear in DOCUMENT \triangleright SETTINGS \triangleright BIBLIOGRAPHY. The argument in square brackets is optional: It declares any $\mathbb{E}T_{EX}$ packages on which the cite engine depends.

The cite engine declaration should then be followed by lines like the following:¹²

```
# DescriptionBegin
# Biblatex supports many author-year and numerical styles.
# It is mainly aimed at the Humanities. It is highly
# customizable_fully_localized and provides many features
```

customizable, fully localized and provides many features

¹¹Preferably in English if the module should be published with LYX. This description will appear in the list of messages to be translated and will be thus translated with the next interface update.
¹²Preferably in English if the module should be published with LYX. This description will appear in

the list of messages to be translated and will be thus translated with the next interface update.

- # that are not possible with BibTeX. The use of 'biber' as
- # bibliography processor is advised.
- # DescriptionEnd

The description is used in DOCUMENT \triangleright SETTINGS \triangleright BIBLIOGRAPHY to provide the user with information about the cite engine.

5.3.4. Format number

The first non-comment line of any layout file, included file, or module must contain the file format number:

Format [int] The format number of the layout file.

This tag was introduced with LYX 1.4.0. Layout files from older LYX versions do not have an explicit file format and are considered to have Format 1. The format for the present version of LYX is format 60. But each version of LYX is capable of reading earlier versions' layout files, just as they are capable of reading files produced by earlier versions of LYX. There is, however, no provision for converting to earlier formats.

5.3.5. General text class parameters

These are general parameters that govern the behavior of an entire document class. (This does *not* mean that they must appear in .layout files rather than in modules. A module can contain any layout tag.)

- AddToCiteEngine <engine> Extends the possibilities for displaying citation references. See sec. 5.3.14 for details. Must end with End.
- AddToHTMLPreamble Adds information that will be output in the <head> block when the document is output to XHTML. Typically, this would be used to output CSS style information, but it can be used for anything that can appear in <head>. Must end with "EndPreamble".
- AddToPreamble Adds information to the document preamble. Must end with "EndPreamble".
- BibInToc [0, 1] If the document class adds the bibliography to the table of contents, add this option with value 1 (or true). This prevents the bibliography from being added twice.
- CiteEngine <engine> Defines the possibilities for displaying citation references. See sec. 5.3.14 for details. Must end with "End". Primarily used in cite engine files (see sec. 5.2.6). Note that if you specify this in a layout file or module, any cite engine definition will be overridden. Also see AddToCiteEngine.

- CiteFormat Defines formats for use in the display of bibliographic information. See sec. 5.3.15 for details. Must end with "End". Primarily used in cite engine files (see sec. 5.2.6). A cite format defined in a layout or module will override the cite engine definition.
- **CiteFramework** [*bibtex*, biblatex] Determines whether Biblatex or BibT_EX is used to generate a Bibliography. Primarily used in cite engine files (see sec. 5.2.6).
- **ClassOptions** Describes various global options supported by the document class. See sec. 5.3.6 for a description. Must end with "End".
- **Columns** [1,2] Whether the class should *default* to having one or two columns. Can be changed in the DOCUMENT \triangleright SETTINGS dialog.

See sec. 5.3.12 for details on counters.

- DefaultFont Sets the default font used to display the document. See sec. 5.3.13 for how to declare fonts. Must end with "EndFont".
- DefaultModule [<module>] Specifies a module to be included by default with this
 document class. The module is specified as filename without the .module ex tension. The user can still remove the module, but it will be active at the
 outset. (This applies only when new files are created, or when this class is
 chosen for an existing document.)
- **DefaultStyle** [<style>] This is the style that will be assigned to new paragraphs, usually STANDARD. This will default to the first defined style if not given, but you are encouraged to use this directive.
- **DocBookRoot** [string] The root element (at the top of the document) to use when outputting documents with this class in DocBook. The default value is "article".
- **DocBookForceAbstract** [boolean] If "true", the root element will always have an <abstract> tag. The default value is "false".
- **ExcludesModule** [<module>] This tag indicates that the module (which is specified by filename without the .module extension) cannot be used with this document class. This might be used in a journal-specific layout file to prevent, say, the use of the theorems-sec module that numbers theorems by section. This tag may *not* be used in a module. Modules have their own way of excluding other modules (see sec. 5.2.1).

Float Defines a new float. See sec. 5.3.9 for details. Must end with "End".

- HTMLPreamble Sets the information that will be output in the <head> block when this document class is output to XHTML. Note that this will completely override any prior HTMLPreamble or AddToHTMLPreamble declarations. (Use AddToHTMLPreamble if you just want to add material to the preamble.) Must end with "EndPreamble".
- HTMLTOCSection [<style>] The style to use for the table of contents, bibliography, and so forth, when the document is output to HTML. For articles, this should normally be Section; for books Chapter. If it is not given, then LYX will attempt to figure out which layout to use.
- IfCounter [<counter>] Modifies the properties of the given counter. If the counter
 does not exist, the statement is ignored. Must end with "End".
 See sec. 5.3.12 for details on counters.
- Input [<filename>] This allows you to include another layout definition file within
 yours to avoid duplicating commands. Common examples are the standard layout files, for example, stdclass.inc, which contains most of the basic layouts.
- InputGlobal [<filename>] is a variant of the Input command which does not look
 for files in the user directory. This allows to create a file name.layout or
 name.inc in the user directory which includes a global file with the same name
 via InputGlobal name or InputGlobal name.inc, respectively (with Input,
 the file would recursively include itself). This way, you can modify global files
 without having to completely copy them.
- InsetLayout [<type>] This section (re-)defines the layout of an inset. It can be applied to an existing inset or to a new, user-defined inset, e.g., a new character style. Must end with "End". See sec. 5.3.10 for more information.
- LeftMargin [string] A string that indicates the width of the left margin on the
- screen, for example, "MMMMM". (Note that this is not a 'length', like "2ex".)
- MaxCiteNames [integer] An integer that determines the maximal number of names displayed in an author-year citation before the citation switches to "FirstAuthor et al.". Primarily used in cite engine files (see sec. 5.2.6).
- ModifyInsetLayout [<type>] Modifies the layout of an inset. If the layout does not exist, this section is ignored. Must end with "End".
- ModifyStyle [<style>] Modifies the properties of the given paragraph style. If the style does not exist, this section is ignored. Must end with "End".
- NoCounter [<counter>] Deletes an existing counter, usually one defined in an included file.

- **NoFloat** [<float>] Deletes an existing float. This is particularly useful when you want to suppress a float that has been defined in an input file.
- **NoStyle** [<style>] Deletes an existing style.
- **OutlinerName** [<type>] [<string>] Define a new table of contents with type <type> and name <string>. See also the AddToToc commands.
- OutputFormat [<format>] The file format (as defined in the LyX preferences) produced by this document class. It is mainly useful when OutputType is literate and one wants to define a new type of literate document. The format is reset to "latex" when the corresponding OutputType parameter is encountered.
- **OutputType** [*latex*, literate] Specifies what sort of output documents using this class will produce.
- PackageOptions [string string] Specifies options, given in the second string, for the package named by the first string. For example, "PackageOptions natbib square" will cause natbib to be loaded with the square option. (For T_EXperts, this causes L_YX to output: \PassOptionsToPackage{natbib}{square} prior to loading natbib.)
- PageSize [custom, letter, legal, executive, a0, a1, a2, a3, a4, a5, a6, b0, b1, b2, b3, b4, b5, b6, c0, c1, c2, c3, c4, c5, c6, b0j, b1j, b2j, b3j, b4j, b5j, b6j] The default page size. This is used by some converters.
- PageStyle [plain, empty, headings] The default pagestyle. Can be changed in the DOCUMENT▷ SETTINGS dialog.
- Preamble Sets the preamble for the LATEX document. Note that this will completely override any prior Preamble or AddToPreamble declarations. (Use AddToPreamble if you just want to add material to the preamble.) Must end with "EndPreamble".
- **ProvideInsetLayout** [<type>] Defines the layout of an inset if it does not already exist. If the layout does exist, this section is ignored. Must end with "End".
- **Provides** [string] [0, 1] Whether the class already provides the feature string. A feature is in general the name of a package (e.g. amsmath or makeidx) or a macro (e.g. url or boldsymbol). See Appendix A for the list of features.
- ProvidesModule [string] Indicates that this layout provides the functionality of the module mentioned, which should be specified by the filename without the .module extension. This will typically be used if the layout includes the module directly, rather than using the DefaultModule tag to indicate that it ought to be used. It could also be used in a module that provided an alternate implementation of the same functionality.

- **ProvideStyle** [<style>] Creates a new paragraph style if it does not already exist. If the style does exist, this section is ignored. Must end with "End".
- Requires [string] Whether the class requires the feature string. Multiple features must be separated by commas. Note that you can only request supported features. (See Appendix A for the list of features.). If you require a package with specific options, you can additionally use PackageOptions.
- **RightMargin** [string] A string that indicates the width of the right margin on the screen, for example, "MMMMM".
- SecNumDepth [int=3] Sets which divisions get numbered. Corresponds to the secnumdepth counter in LATEX.
- **Sides** [1,2] Whether the class-default should be printing on one or both sides of the paper. Can be changed in the DOCUMENT \triangleright SETTINGS dialog.
- Style [<name>] This sequence defines a paragraph style. If the style does not yet
 exist, it is created; if it does exist, its parameters are modified. Must end with
 "End".

See sec. 5.3.7 for details on paragraph styles.

- **TableStyle** [<name>] defines the default table style that is used when inserting a table. The following styles are available:
 - Formal_with_Footline: formal ("booktabs") style with horizontal lines only, using a bold top and bottom line, the first and last row are additionally separated from the table body with a thin middle line.
 - Formal_without_Footline: same as the above, but the last row is not separated with a middle line from the body.
 - Simple_Grid: Simple table lines.
 - Grid_with_Head: Like Simple_Grid, but with the header row offset with a second horizontal line. This is also the default style of LyX.
 - No_Borders: Table without lines.
- **TitleLatexName** [string="maketitle"] The name of the command or environment to be used with TitleLatexType.
- TitleLatexType [CommandAfter, Environment] Indicates what kind of markup is
 used to define the title of a document. CommandAfter means that the macro
 with name TitleLatexName will be inserted after the last layout which has
 "InTitle 1". Environment corresponds to the case where all layouts which
 have "InTitle 1" should be enclosed into the TitleLatexName environment.
- TocDepth [int=3] Sets which divisions are included in the table of contents. Corresponds to the tocdepth counter in LATEX.

5.3.6. ClassOptions section

The ClassOptions section can contain the following entries:

- FontSize [string="10|11|12"] The list of available font sizes for the document's
 main font, separated by "|". Any number is possible.
- FontSizeFormat [string] The format for the font size option. Default: \$\$spt. \$\$s
 is a placeholder for the font size.
- PageSize [string="letter|legal|executive|a0|a1|a2|a3|a4|a5|a6|b0|b1|b2| b3|b4|b5|b6|c0|c1|c2|c3|c4|c5|c6|b0j|b1j|b2j|b3j|b4j|b5j|b6j"] The list of available page sizes, separated by "|". Currently, only the listed sizes are supported. Other sizes might be entered as custom class option.
- PageSizeFormat [string] The format for the page size option. Default: \$\$spaper.
 \$\$s is a placeholder for the paper size.
- PageStyle [string="empty|plain|headings|fancy"] The list of available page styles, separated by "|".
- **Other** [string=""] Some document class options, separated by a comma, that will be added to the optional part of the \documentclass command.

The ClassOptions section must end with "End".

5.3.7. Paragraph styles

A paragraph style description looks like this:¹³

```
Style name ...
End
```

where the following commands are allowed:

AddToToc [string=""] This paragraph will appear in the table of contents of the given type. An empty string disables. See also the OutlinerName and the IsTocCaption commands. Default: disabled.

Align [block, left, right, center] Paragraph alignment.

AlignPossible [block, left, right, center] A comma separated list of permitted alignments. (Some LATEX styles prohibit certain alignments, since those wouldn't make sense. For example a right-aligned or centered enumeration isn't possible.)

 $^{^{13}\}mathrm{Note}$ that this will either define a new style or modify an existing one.

- Argument [int] Defines argument number <int> of a command/environment associated with the current style. The definition must end with EndArgument. See sec. 5.3.11 for more information.
- AutoNests Includes a comma-separated list of layouts that should be nested in and after the current layout. Only makes sense for nestable layouts (such as environments). Must be ended by "EndAutoNests". See also IsAutoNestedBy.
- **BabelPreamble** Note that this will completely override any prior BabelPreamble declaration for this style. Must end with "EndBabelPreamble". See sec. 5.3.8 for details on its use.
- **BottomSep** [float=0]¹⁴ The vertical space with which the last of a chain of paragraphs with this style is separated from the following paragraph. If the next paragraph has another style, the separations are not simply added, but the maximum is taken.
- **Category** [string] The category for this style. This is used to group related styles in the style combobox on the toolbar. Any string can be used, but you may want to use existing categories with your own styles.
- **CopyStyle** [string] Copies all the features of an existing style into the current one. Note that this copies the style as it is defined at that point. Later changes to it will not affect styles into which it has been copied.
- **DependsOn** [<name>] The name of a style whose preamble should be output *before* this one. This allows to ensure some ordering of the preamble snippets when macros definitions depend on one another.¹⁵
- DocBookGenerateTitle [bool=false] Generates a title tag after the wrapper tag. This parameter should only be used withDocBookWrapperTag, otherwise the title will be output *before* the contents of the environment. The generated title is the same as the LyXHTML label: a combination of the environment type and its number. A major use is when DocBook has no close mapping for LaTeX environments and users must fallback to using a generic container such asfigure, which requires a title although there is none in LaTeX. This feature is heavily used for theorem-like environments.
- EndLabelType [No_Label, Box, Filled_Box, Static] The type of label that stands
 at the end of the paragraph (or sequence of paragraphs if LatexType is
 Environment, Item_Environment or List_Environment). No_Label means
 "nothing", Box (resp. Filled_Box) is a white (resp. black) square suitable for
 end of proof markers, Static is an explicit text string.

 $^{^{14}\}mathrm{Note}$ that a 'float' here is a real number, such as: 1.5.

 $^{^{15}}$ Note that, besides that functionality, there is no way to ensure any ordering of preambles. The ordering that you see in a given version of LyX may change without warning in later versions.

- EndLabelString [string=""] The string used for a label with a Static EndLabelType.
- Font The font used for both the text body and the label. See sec. 5.3.13. Note that defining this font automatically defines the LabelFont to the same value. So you should define this one first if you also want to define LabelFont.
- ForceLocal [int=0] Used for backporting new styles to stable L_YX versions. The first stable version that supports this tag is L_YX 2.1.0. The argument is a number which may either be 0, -1 or any value greater than zero. If the ForceLocal flag of a style is greater than zero, it will always be written to the document header. If a .lyx file is read, the style definitions from the document header are added to the document class. Therefore even older L_YX versions can handle the style. The argument of ForceLocal is a version number: if the style is read, and the version number is less than the version number of the already existing style in the document class, the new style is ignored. If the version number is greater, the new style replaces the existing style. A value of -1 means an infinite version number, i.e. the style is always used.
- FreeSpacing [0, 1] Usually LyX does not allow you to insert more than one space between words, since a space is considered as the separation between two words, not a character or symbol of its own. This is a very fine thing but sometimes annoying, for example, when typing program code or plain LATEX code. For this reason, FreeSpacing can be enabled. LyX will create non-breaking spaces for the additional blanks when Passthru 1 is not specified. Note that FreeSpacing implies KeepEmpty.
- HTML* These tags are used with XHTML output. See sec. 5.4.1.
- **InPreamble** [0, 1] If 1, marks the style as to be included in the document preamble and not in the document body. This is useful for document classes that want such information as the title and author to appear in the preamble. Note that this works only for styles for which the LatexType is Command or Paragraph.
- InTitle [0,1] If 1, marks the style as being part of a title block (see also the TitleLatexType and TitleLatexName global entries).
- IsAutoNestedBy Includes a comma-separated list of layouts after which this one should be nested. Only makes sense with regard to nestable layouts (such as environments). Must be ended by "EndIsAutoNestedBy". See also AutoNests.
- **IsTocCaption** [0, 1] If this is set to 1 and AddToToc is enabled, the paragraph adds a summary of its contents in its item in the table of contents. Otherwise, only the label, if it exists, appears.

- ItemCommand [string="item"] The LATEX command sequence declaring an item in a list. The command is to be defined without the preceding backslash (the default is "item", resulting in \item in the LATEX output).
- ItemSep [float=0] This provides extra space between paragraphs that have the same style. If you put other styles into an environment, each is separated with the environment's ParSep. But the whole items of the environment are additionally separated with this ItemSep. Note that this is a *multiplier*.
- **KeepEmpty** [0, 1] Usually LyX does not allow you to leave a paragraph empty, since it would lead to empty LATEX output. There are some cases where this could be desirable however: in a letter template, the required fields can be provided as empty fields, so that people do not forget them; in some special classes, a style can be used as some kind of break, which does not contain actual text.
- LabelBottomsep [float=0] The vertical space between the label and the text body. Only used for labels that are above the text body (Top_Environment and Centered_Top_Environment).
- LabelCounter [string=""] The name of the counter for automatic numbering. In
 order to have the counter appear with your label, you will need to reference
 it in the LabelString. This will work with LabelTypes, Static, Above and
 Centered, at least.

This may also be given if LabelType is Enumerate, though this case is a bit complicated. Suppose you declare "LabelCounter myenum". Then the actual counters used are myenumi, myenumii, myenumiii and myenumiv, much as in LATEX. These counters must all be declared separately. See sec. 5.3.12 for details on counters.

LabelFont The font used for the label. See sec. 5.3.13.

LabelIndent [string=""] Text that indicates how far a label should be indented.

- LabelSep [string=""] Text that indicates the amount of horizontal space between the label and the text body. Only used for labels that are not above the text body.
- LabelString [string=""] The string used for the label. When LabelCounter is set, this string can be contain the special formatting commands described in sec. 5.3.12.
- LabelStringAppendix [string=""] This is used inside the appendix instead of LabelString. Note that every LabelString statement resets LabelStringAppendix too.
- LabelType [No_Label, Manual, Static, Above, Centered, Sensitive, Enumerate, Itemize, Bibliography]

- Manual means the label is the very first word (up to the first real blank). Use non-breaking spaces if you want more than one word as the label.
- Static means the label is simply what is declared as LabelString. This will be displayed "inline", at the beginning of the paragraph. If the LatexType is Environment, then it will be displayed only in the first paragraph of any sequence of paragraphs with the same Style.
- Above and Centered are special cases of Static. The label will be printed above the paragraph either at the beginning of the line or centered.
- Sensitive is a special case for the caption-labels "Figure" and "Table".
 Sensitive means the (hardcoded) label string depends on the kind of float: It is hardcoded to be 'FloatType N', where N is the value of the counter associated with the float. For the case that a caption is inserted outside of a float the LabelString will appear as "Senseless!".
- **Enumerate** produces the usual sort of enumeration labels. The number type needs to be set in the **Counter**, see sec. 5.3.12.
- **Itemize** produces various bullets at the different levels. The bullet types displayed can be set via DOCUMENT \triangleright SETTINGS \triangleright BULLETS.

Bibliography should be used only with LatexType BibEnvironment.

- LangPreamble Note that this will completely override any prior LangPreamble declaration for this style. Must end with "EndLangPreamble". See sec. 5.3.8 for details on its use.
- LatexName [<name>] The name of the corresponding LATEX stuff. Either the environment or command name.
- LatexParam [<parameter>] An optional parameter for the corresponding LatexName stuff. This parameter cannot be changed from within L_YX (use Argument for customizable parameters). This will be output as is after all LATEX Arguments.
- LatexType [Paragraph, Command, Environment, Item_Environment, List_Environment, Bib_Environment] How the style should be translated into LAT_EX.¹⁶

Paragraph means nothing special.

Command means \LatexName {...}.

Environment means \begin{LatexName}...\end{LatexName}.

Item_Environment is the same as **Environment**, except that an **\item** is generated for each paragraph of this environment.

¹⁶LatexType is perhaps a bit misleading, since these rules apply to SGML classes, too. Visit the SGML class files for specific examples.

- List_Environment is the same as Item_Environment, except that
 LabelWidthString is passed as an argument to the environment.
 LabelWidthString can be defined in the EDIT > PARAGRAPH SETTINGS
 dialog.
- **Bib_Environment** is like **Environment** but adds the necessary mandatory argument (the longest label) to the begin statement of the bibliography environment:

\begin{thebibliography}{99}. It is therefore only useful for bibliography environments. The default longest label "99" can be changed by the user in the paragraph settings of a bibliography item.

Putting the last few things together, the LATEX output will be either:

```
\LatexName[LatexParam]{...}
```

or:

```
\begin{LatexName}[LatexParam] ... \end{LatexName}.
```

depending upon the $\square T_E X$ type.

- LeftDelim [string] A string that is put at the beginning of the style content. A line break in the output can be indicated by
.
- **LeftMargin** [string=""] If you put styles into environments, the different LeftMargin are not simply added, but added with a factor $\frac{4}{\text{depth}+4}$. Note that this parameter is also used when Margin is defined as Manual or Dynamic. Then it is added to the manual or dynamic margin.

For example "MM" means that the paragraph is indented with the width of "MM" in the normal font. You can get a negative width by prefixing the string with "–". This way was chosen so that the look is the same with each used screen font.

- Margin [Static, Manual, Dynamic, First_Dynamic, Right_Address_Box] The kind of margin that the style has on the left side.
 - Static just means a fixed margin.
 - Manual means that the left margin depends on the string entered in the EDIT ▷ PARAGRAPH SETTINGS dialog. This is used to typeset nice lists without tabulators.
 - **Dynamic** means that the margin depends on the size of the label. This is used for automatic enumerated headlines. It is obvious that the headline "5.4.3.2.1 Very long headline" must have a wider left margin (as wide as "5.4.3.2.1" plus the space) than "3.2 Very long headline", even if standard "word processors" are not able to do this.

- First_Dynamic is similar, but only the very first row of the paragraph is dynamic, while the others are static; this is used, for example, for descriptions.
- **Right_Address_Box** means the margin is chosen in a way that the longest row of this paragraph fits to the right margin. This is used to typeset an address on the right edge of the page.
- **NeedProtect** [0, 1] Whether fragile commands in this style should be **\protect**'ed. (Note: This is *not* whether this command should itself be protected.)
- NeedCProtect [-1, 0, 1] Value 1 causes macros that contain this layout to be protected with \cprotect (cf. package cprotect) if necessary and thus allows (some) verbatim stuff in macros. With the default setting (value 0), \cprotect is used if a nested element requires it. Value -1 prevents any use of \cprotect within this layout, even if required by a nested element.
- NeedMBoxProtect [0, 1] Whether specific commands in this style (such as \cite and \ref) should be protected in an \mbox. This is particularly needed for styles that draw on ulem or soul commands which parse their content in complex ways.
- Newline [0, 1] Whether newlines are translated into LAT_{EX} newlines (\\) or not. The translation can be switched off to allow more comfortable LAT_{EX} editing inside L_{YX} .
- NextNoIndent [0, 1] If set to true, and if DefaultStyle (usually Standard) paragraphs are being indented, then the indentation of such a paragraph following one of this type will be suppressed. (So this will not affect the display of non-default paragraphs.)
- **ObsoletedBy** [<name>] Name of a style that has replaced this style. This is used to rename a style, while keeping backward compatibility.
- ParagraphGroup [0, 1] Determines whether consecutive paragraphs of the same type are treated as belonging together. This has the effect that the GuiLabel is only printed once before such a group. By default, this is true for LaTeXType Environment and Bib_Environment and false for all other types.
- **ParbreakIsNewline** [0, 1] Indicates that paragraphs will not be separated by an empty line in ET_EX output, but only by a line break; together with PassThru 1, this allows to emulate a plain text editor (like the ERT inset).
- ParIndent [string=""] The indent of the very first line of a paragraph. The Parindent will be fixed for a certain style. The exception is the default style, since the indentation for these paragraphs can be prohibited with NextNoIndent. Also, Standard style paragraphs inside environments use the Parindent of the environment, not their native one. For example, Standard paragraphs inside an enumeration are not indented.

ParSep [float=0] The vertical space between two paragraphs of this style.

- Parskip [float=0] L_YX allows the user to choose either "indent" or "skip" to separate paragraphs. When "indent" is chosen, Parskip is ignored. When "skip" is chosen, ParIndent is ignored and all paragraphs are separated by the Parskip argument. The vertical space is calculated with Parskip * DefaultHeight where DefaultHeight is the height of a row with the normal font. This way, the look stays the same with different screen fonts.
- **PassThru** [0, 1] Whether the contents of this paragraph should be output in raw form, meaning without special translations that ETFX would require.
- **PassThruChars** [string] Defines individual characters that should be output in raw form, meaning without special translations that LATEX would require.
- **Preamble** Information to be included in the LATEX preamble when this style is used. Used to define macros, load packages, etc., required by this particular style. Must end with "EndPreamble".
- **RefPrefix** [string] The prefix to use when creating labels referring to paragraphs of this type. This allows the use of formatted references.
- **Requires** [string] Whether the style requires the feature string (see Appendix A for the list of features). If you require a package with specific options, you can additionally use PackageOptions as a general text class parameter (see sec. 5.3.5).
- **ResetArgs** [0,1] Resets the LATEX arguments of this style (as defined via the Argument tag). This is useful if you have copied a style via CopyStyle, but you do not want to inherit its (required and optional) arguments.
- **ResumeCounter** [0,1] Resumes a counter that is usually reset at each new sequence of layouts. This is currently only useful when LabelType is Enumerate.
- **RightDelim** [string] A string that is put at the end of the layout content. A line break in the output can be indicated by
br/>.
- **RightMargin** [string=""] Similar to LeftMargin.
- Spacing [single, onehalf, double, other <value>] This defines what the default spacing should be in the style. The arguments single, onehalf and double correspond respectively to a multiplier value of 1, 1.25 and 1.667. If you specify the argument other, then you must also provide a value argument which will be the actual multiplier value. Note that, contrary to other parameters, Spacing implies the generation of specific LATEX code, using the LATEX package setspace.

Spellcheck [0, 1] Allow spell-checking paragraphs of this style. Default is true.

- StepParentCounter [0,1] Steps the parent counter of a given counter at the beginning of a new sequence of layouts. This is currently only useful when LabelType is Enumerate.
- **TextFont** The font used for the text body . See sec. 5.3.13.
- **TocLevel** [int=3] The level of the style in the table of contents. This is used for automatic numbering of section headings.
- ToggleIndent [default, always, never] This tag determines whether the first line indentation of this paragraph can be toggled via the Paragraph settings dialog. If *default* is set, indentation can be toggled if the document settings use "indent" paragraph style, with always, indentation can always be toggled, notwithstanding the document settings, with never, indentation can never be toggled.
- **TopSep** [float=0] The vertical space with which the very first of a chain of paragraphs with this style is separated from the previous paragraph. If the previous paragraph has another style, the separations are not simply added, but the maximum is taken.

5.3.8. Internationalization of Paragraph Styles

L_YX has long supported internationalization of layout information, but, until version 2.0, this applied only to the user interface and not to, say, PDF output. Thus, French authors were forced to resort to ugly hacks if they wanted 'Théorème 1' instead of 'Theorem 1'. Thanks to Georg Baum, that is no longer the case.

If a Style defines text that is to appear in the typeset document, it may use LangPreamble and BabelPreamble to support non-English and even multi-language documents correctly. The following excerpt (from the theorems-ams.inc file) shows how this works:

```
Preamble
```

```
\theoremstyle{remark}
\newtheorem{claim}[thm]{\protect\claimname}
EndPreamble
LangPreamble
\providecommand{\claimname}{_(Claim)}
EndLangPreamble
BabelPreamble
\addto\captions$$lang{\renewcommand{\claimname}{_(Claim)}}
EndBabelPreamble
```

In principle, any legal LATEX may appear in the LangPreamble and BabelPreamble tags, but in practice they will typically look as they do here. The key to correct

translation of the typeset text is the definition of the LATEX command \claimname and its use in \newtheorem.

The LangPreamble tag provides for internationalization based upon the overall language of the document. The contents of the tag will be included in the preamble, just as with the Preamble tag. What makes it special is the use of the "function" _(), which will be replaced, when L_YX produces LAT_EX output, with the translation of its argument into the document language.

The BabelPreamble tag is more complex, since it is meant to provide support for multi-language documents and so offers an interface to the babel package. Its contents will be added to the preamble once for each language that appears in the document. In this case, the argument to _() will be replaced with its translation into the language in question; the expression \$\$lang is replaced by the language name (as used by the babel package).

A German document that also included a French section would thus have the following in the preamble:

\addto\captionsfrench{\renewcommand{\claimname}{Affirmation}}
\addto\captionsngerman{\renewcommand{\claimname}{Behauptung}}
\providecommand{\claimname}{Behauptung}

LATEX and babel will then conspire to produce the correct text in the output.

One important point to note here is that the translations are provided by LYX itself, through the file layouttranslations. This means, in effect, that LangPreamble and BabelPreamble are really only of use in layout files that are provided with LYX, since text entered in user-created layout files will not be seen by LYX's internationalization routines unless the layouttranslations file is modified accordingly. That said, however, any layout created with the intention that it will be included with LYX should use these tags where appropriate. Please note that the paragraph style translations provided by LYX will never change with a minor update (e. g. from version 2.1.x to 2.1.y). It is however quite likely that a major update (e. g. from 2.0.x to 2.1.0) will introduce new translations or corrections.

5.3.9. Floats

It is necessary to define the floats (FIGURE, TABLE, ...) in the text class itself. Standard floats are included in the file stdfloats.inc, so you may have to do no more than add

Input stdfloats.inc

to your layout file. If you want to implement a text class that proposes some other float types (like the AGU class bundled with L_YX), the information below will hopefully help you:

- AllowedPlacement [string=!htbpH] Allowed placement options for this float type. The value is a string of placement characters. Possible characters include: h ("here if possible"), t ("top of page"), b ("bottom of page"), p ("page of floats"), H ("here definitely") and ! ("ignore LaTeX rules"). The order of the characters in the string does not matter. If no placement options are allowed, use the string none.
- AllowsSideways [0, 1] Defines whether the float allows to be rotated via the LATEXpackage rotfloat (sidewaysfloat). Set to 0 if the float does not support this feature.
- AllowsWide [0, 1] Defines whether the float has a starred variant that spans columns in a two column paragraph. Set to 0 if the float does not support this feature.
- Extension [string=""] The file name extension of an auxiliary file for the list of figures (or whatever). LATEX writes the captions to this file.
- GuiName [string=""] The string that will be used in the menus and also for the caption. This is translated to the current language if babel is used.
- HTML* These tags control the XHTML output. See sec. 5.4.
- IsPredefined [0, 1] Indicates whether the float is already defined in the document class or if instead the LATEX package float needs to be loaded to define it onthe-fly. The default is 0, which means: float is used. It should be set to 1 if the float is already defined by the LATEX document class.
- ListCommand [string=""] The command used to generate a list of floats of this type; the leading '\' must be omitted. This *must* be given if UsesFloatPkg is false, since there is no standard way to generate this command. It is ignored if UsesFloatPkg is true, since in that case there is a standard way to define the command.
- ListName [string=""] A title for a list of floats of this kind (list of figures, tables, or whatever). It is used for the screen label within L_YX, it is used by LAT_EX for the title and it is used as the title in the XHTML output. It will be translated to the document language.
- NumberWithin [string=""] This (optional) argument determines whether floats of this class will be numbered within some sectional unit of the document. For example, if NumberWithin is set to "chapter", the floats will be numbered within chapters.
- Placement [string=""] The default placement for the given class of floats. The string should be as in standard LATEX: t, b, p and h for top, bottom, page, and here, respectively.¹⁷ On top of that there is a new type, H, which does not

¹⁷Note that the order of these letters in the string is irrelevant, like in $L^{AT}EX$.

5. Installing New Document Classes

really correspond to a float, since it means: put it "here" and nowhere else. Note however that the H specifier is special and, because of implementation details, cannot be used in non-built in float types. If you do not understand what this means, just use "tbp".

- PrettyFormat [string=""] A format for use with formatted references to this counter. For example, one might want to have references to tables appear as "Table 2". The string may contain "##" or a counter specification. (See the documentation for LabelString in sec. 5.3.12.) The former will be replaced by the counter number itself. So, for sections, it would be: Section ##, or perhaps: section \arabic{section} (which might render as: section 2.7).
- **RefPrefix** [string] The prefix to use when creating labels referring to floats of this type. This allows the use of formatted references. Note that you can remove any **RefPrefix** set by a copied style by using the special value "OFF", which must be all caps.
- **Requires** [string] As with paragraph styles, see sec. 5.3.7.
- Style [string=""] The style used when defining the float using \newfloat.
- Type [string=""] The "type" of the new class of floats, like program or algorithm. After the appropriate \newfloat, commands such as \begin{program} or \end{algorithm*} will be available.
- UsesFloatPkg [0, 1] Specifies whether this float is defined using the LATEX package float, either by the class file, another package or on-the-fly by LYX itself.

Note that defining a float with type type automatically defines the corresponding counter with name type.

5.3.10. Flex insets and InsetLayout

Flex insets come in two different kinds:

- character style (CharStyle): These define semantic markup corresponding to such LATEX commands as \noun and \code.
- user custom (Custom): These can be used to define custom collapsible insets, similar to T_EX code, footnote, and the like. An obvious example is an endnote inset, which is defined in the endnote module.

Flex insets are defined using the **InsetLayout** tag, which shall be explained in a moment.

The InsetLayout tag also serves another function: It can be used to customize the general layout of many different types of insets. Currently, InsetLayout can be used to customize the layout parameters for footnotes, marginal notes, note insets, T_EX code (ERT) insets, branches, listings, indexes, boxes, tables, algorithms, URLs, and captions, as well as to define Flex insets.

The InsetLayout definition must begin with a line of the form:

InsetLayout <type>

Here **<Type>** indicates the inset whose layout is being defined, and here there are four cases.

- The layout for a pre-existing inset is being modified. In this case, can be <Type> any one of the following: Algorithm, Branch, Box, Box:shaded, Caption:Standard, ERT, Figure, Foot, Index, Info, Info:menu, Info:shortcut, Info:shortcuts, Listings, Marginal, Note:Comment, Note:Note, Note:Greyedout, Table, or URL.
- 2. The layout for a Flex inset is being defined. In this case, <Type> must be of the form "Flex:<name>", where name may be any valid identifier not used by a pre-existing Flex inset. The identifier may include spaces, but in that case the whole thing must be wrapped in quotes. Note that the definition of a flex inset *must* also include a LyXType entry, declaring which type of inset it defines.
- 3. The layout for user specific branch is being defined. In this case, <Type> must be of the form "Branch:<name>", where name may be any valid identifier of branch defined in user's document. The identifier may include spaces, but in that case the whole thing must be wrapped in quotes. The main purpose of this feature is to allow LATEX wrapping around specific branches as user needs.
- 4. The layout of a user (or class) specific caption is being defined. In this case, <Type> must be of the form "Caption:<name>", where name specifies the name of the caption as it appears in the menu. Have a look at the standard caption (Caption:Standard), the specific captions of the KOMA-Script classes (Caption:Above, Caption:Below) or the module Multilingual Captions (Caption:Bicaption) for applications.

The InsetLayout definition can contain the following entries:

- AddToToc [string=""] This inset will appear in the table of contents of the given type. An empty string disables. See also the OutlinerName and the IsTocCaption commands. This is only implemented for Flex insets. Default: disabled.
- AllowedInInsets Includes a comma-separated list of insets to which this inset can be inserted. Must be ended by "EndAllowedInInsets". If you you also want the insertion to be allowed in specific arguments of the target insets, append the argument name after @ (e.g., My_Inset@post:1). Note that this currently only supports immediately containing insets (no deeper nesting). See also AllowedInLayouts.

- AllowedInLayouts Includes a comma-separated list of layouts within which this inset can be inserted. Must be ended by "EndAllowedInLayouts". Note that this currently only supports immediately containing layouts (no deeper nesting). See also AllowedInInsets.
- AllowedOccurrences [int] If AllowedInInsets or AllowedInLayouts has been defined, this can be used to determine how many times the inset can be inserted to a given inset or the paragraph (group).
- AllowedOccurrencesPerItem [0, 1] If this is set to true, AllowedOccurrences applies to single paragraphs if we are in a list-type environment (with \items).
- Argument [int] Defines argument number of a command/environment associated with the current layout. The definition must end with EndArgument. See sec. 5.3.11 for more information.
- **BabelPreamble** Preamble for changing language commands; see sec. 5.3.8.
- **BgColor** [<name>] The color for the inset's background. See Appendix B for a list of the available color names.
- **ContentAsLabel** [0, 1] Whether to use the content of the inset as the label, when the inset is closed. Default is false.
- **CopyStyle** [<type>] As with paragraph styles, see sec. 5.3.7. Note that you need to specify the complete type, e.g. CopyStyle Flex:<name>.
- **CustomPars** [0, 1] Indicates whether the user may employ the Paragraph Settings dialog to customize the paragraph.
- **Decoration** can be Classic, Minimalistic, or Conglomerate, describing the rendering style used for the inset's frame and buttons. Footnotes generally use Classic, ERT insets generally Minimalistic, and character styles Conglomerate.
- Display [0, 1] Only useful if LatexType is Environment. Indicates whether the environment will stand on its own in the output or will appear inline with the surrounding text. If set to false, it is supposed that the LATEX environment ignores white space (including one newline character) after the \begin{LatexName} and \end{LatexName} tags. Default is true.
- **EditExternal** [0,1] Allow the contents of the inset to be edited externally (using whatever editor is defined for the document's output format).
- End Required at the end of the InsetLayout declarations.
- Font The font used for both the text body *and* the label. See sec. 5.3.13. Note that defining this font automatically defines the LabelFont to the same value, so define this first and define LabelFont later if you want them to be different.

- FixedWidthPreambleEncoding [0, 1] Force a fixed width encoding for the translated contents of BabelPreamble and LangPreamble code generated by this layout. This is needed for special LATEX-packages like listings that do not work with variable width encodings such as utf8. This setting is ignored if fully Unicode aware LATEX backends such as XeTEX or LuaTEX are used.
- **ForceLocalFontSwitch** [0, 1] When using babel, always use a local font switch (\foreignlanguage), never a global one (such as \selectlanguage).
- **ForceOwnlines** [0, 1] Force a line break in the $\[Mathbb{E}]$ A output before the inset starts and after the inset ends. This assures the inset itself is output on its own lines, for parsing purposes.
- ForcePlain [0, 1] Indicates whether the PlainLayout should be used or, instead, the user can change the paragraph style used in the inset. Default is false.
- **FreeSpacing** [0, 1] As with paragraph styles, see sec. 5.3.7.
- HTML* These tags control the XHTML output. See sec. 5.4.
- **InheritFont** [0, 1] The font inside the inset is inherited from the parent for LATEX export if this parameter is 1, as well as on screen. Otherwise the document default font is used.
- **InToc** [0, 1] Whether to include the contents of this inset in the strings generated for the 'Outline' pane for all table of contents, regardless of the AddToToc setting. One would not, for example, want the content of a footnote in a section header to be included in the TOC displayed in the outline, but one would normally want the content of a character style displayed. Default is false: not to include.
- **IsTocCaption** [0, 1] If this is set to 1 and AddToToc is enabled, the inset adds a summary of its contents in its item in the table of contents. Otherwise, only the label appears.
- **KeepEmpty** [0, 1] As with paragraph styles, see sec. 5.3.7.
- LabelFont The font used for the label. See sec. 5.3.13. Note that this definition can never appear before Font, lest it be ineffective.
- LabelString [string=""] What will be displayed on the button or elsewhere as the inset label. Some inset types (TEX code and Branch) modify this label on the fly.
- LangPreamble Language dependent preamble; see sec. 5.3.8.

- LatexName [<name>] The name of the corresponding LATEX stuff. Either the environment or command name.
- LatexParam [<parameter>] The optional parameter for the corresponding LatexName stuff, including possible bracket pairs like []. This parameter cannot be changed from within LYX (use Argument for customizable parameters). It will be output as is after all LATEX Arguments.
- LatexType [Command, Environment, None] How the style should be translated into LATEX.¹⁸
 - None means nothing special

```
Command means \LatexName {...}
```

```
Environment means \begin{LatexName}...\end{LatexName}
```

Putting the last few things together, the LATEX output will be either:

```
\LatexName[LatexParam]{...}
```

or:

```
\begin{LatexName}[LatexParam] ... \end{LatexName}
```

depending upon the LATEX type.

- LeftDelim [string] A string that is put at the beginning of the layout content. A line break in the output can be indicated by
.
- LyxType Can be charstyle, custom, or end (indicating a dummy definition ending definitions of charstyles, etc). This entry is required in and is only meaningful for Flex insets. Among other things, it determines on which menu this inset will appear. Setting LyxType to charstyle will automatically set MultiPar to false and ForcePlain to true. MultiPar can be set to true, or ForcePlain to false, for charstyle insets by setting it *after* you set the LyxType.
- MenuString [string] A dedicated string for the menu. You can define an accelerator by appending the respective character to the string, divided by "|" (e.g. "My Inset|M"). This specification is optional. If it is not given the inset name as specified in the type declaration will be used instead for the menu.
- MultiPar [0,1] Whether multiple paragraphs are permitted in this inset. This will also set CustomPars to the same value and ForcePlain to the opposite value. These can be reset to other values, if they are used after MultiPar. Default is true.

¹⁸LatexType is perhaps a bit misleading, since these rules apply to SGML classes too. Visit the SGML class files for specific examples.

- **NeedProtect** [0, 1] Whether fragile commands in this inset should be **\protect**'ed. (Note: This is *not* whether the command should itself be protected.) Default is false.
- **NeedCProtect** [0, 1] This causes macros that contain this inset to be protected with \cprotect (cf. package cprotect) if necessary and thus allows (some) verbatim stuff in macros. Default is false.
- NeedMBoxProtect [0, 1] Whether specific commands in this inset (such as \cite and \ref) should be protected in an \mbox. This is particularly needed for insets that draw on ulem or soul commands which parse their content in complex ways. Default is false.
- NewlineCmd [string] Option to define a different command (from the default \\) to be used for line breaks. The initial backslash must not be specified.
- NoInsetLayout [<layout>] Deletes an existing InsetLayout.
- **ObsoletedBy** [<layout>] Name of an InsetLayout that has replaced this InsetLayout. This is used to rename an InsetLayout, while keeping backward compatibility.
- **ParbreakIgnored** [0, 1] If this is set to 1, paragraph breaks will be ignored in the output. This might be useful for insets where the content should be alignable on different lines only in the L_YX workarea, without any effect in the output.
- **ParbreakIsNewline** [0, 1] As with paragraph styles, see sec. 5.3.7. Default is false.
- **PassThru** [0, 1] As with paragraph styles, see sec. 5.3.7. Default is false.
- **Preamble** As with paragraph styles, see sec. 5.3.7.
- **RefPrefix** [string] The prefix to use when creating labels referring to insets of this type. This allows the use of formatted references.
- **Requires** [string] As with paragraph styles, see sec. 5.3.7.
- **ResetArgs** [0, 1] Resets the $\[AT_EX]$ arguments of this layout (as defined via the Argument tag). This is useful if you have copied a style via CopyStyle, but you do not want to inherit its (required and optional) arguments.
- ResetsFont [0,1] If 1, font changes are redone inside the respective inset (in the
 output) even if the inset itself is in the context of this font changes (e.g.,
 \textbf{Sourrounding text \myinset{\textbf{content}}...} rather than
 \textbf{Sourrounding text \myinset{content}...}. Setting this makes
 sense for commands that internally reset font settings (e.g., footnotes). Note
 that wrongly setting this might lead to unwanted result (e.g., with \emph{Sourrounding
 text \myinset{\emph{content}}...}, content is upright, as \emph toggles.
 Default is 0: font changes are not redone inside the inset.

RightDelim [string] A string that is put at the end of the layout content. A line break in the output can be indicated by
br/>.

Spellcheck [0, 1] Allow spell-checking the contents of this inset. Default is true.

5.3.11. Arguments

Both paragraph styles and inset layouts allow for *arguments* as well as the main content. This is especially useful for things like section headings and only makes sense with LATEX. Each (optional or required) argument of a command or environment—except for the required argument that is associated with the content—has a separate definition, where the number specifies the order of the arguments. The definition must end with EndArgument. So a command with two optional arguments looks like:

```
Argument 1
...
EndArgument
Argument 2
...
EndArgument
```

Inside the Argument definition, the following specifications are possible:

- LabelString [string] The string that will appear both in the menu (to insert this argument) and on the argument inset button (unless you also specify a separate MenuString). For the menu, you can define an accelerator by appending the respective character to the string, divided by "|" (e.g. "Short Title|S").
- MenuString [string] A separate string for the menu. You can define an accelerator by appending the respective character to the string, divided by "|" (e.g. "Short Title|S"). This specification is optional. If it is not given the LabelString will be used instead for the menu.
- Tooltip [string] A longer explanatory text that appears in the tooltip when hovering over the argument inset.
- Mandatory [0, 1] Declare if this is a mandatory (1) or an optional (0) argument. Mandatory arguments will be output empty if not given, while optional arguments will not be output at all. By default, mandatory arguments are delimited by {...}, while optional arguments are delimited by [...]
- NewlineCmd [string] Option to define a different command (from the default \\) to be used for line breaks. The initial backslash must not be specified.

- Requires [int=0] defines another argument or arguments (by their number) which this argument requires to be output if it is itself output. E.g., in LATEX commands, optional arguments often require previous optional arguments to be output (at least empty), as in \command[][argument]{text}. This can be achieved by the statement Requires 1 within Argument 2. If multiple arguments are required, separate them by comma (e.g., Requires 1,2).
- LeftDelim [string] defines a custom left delimiter (instead of { or [). A line break in the output can be indicated by
.
- RightDelim [string] defines a custom right delimiter (instead of } or]). A line break in the output can be indicated by
>.
- DefaultArg [string] defines an argument that is inserted if and only if no userspecified arguments were given, i. e. if no argument inset has been inserted (note that also an empty argument inset omits the DefaultArg). Multiple arguments need to be separated by comma.
- **PresetArg [string]** defines an argument that is inserted in any case (alone or in addition to user-specified arguments). Multiple arguments need to be separated by comma.
- Font The font used for the argument content, see sec. 5.3.13.
- FreeSpacing [0, 1] As with paragraph styles, see sec. 5.3.7.
- LabelFont The font used for the label; see sec. 5.3.13.
- Decoration [*Classic*, Minimalistic, Conglomerate] describes the rendering style used for the inset's frame and buttons.
- AutoInsert [int=0] If this is set to 1, this argument is automatically inserted when the respective style is selected.
- InsertOnNewline [int=0] If this is set to 1, this argument will be inserted on a new line with AutoInsert (only available within Flex insets).
- InsertCotext [int=0] If this is set to 1, this argument will be inserted with a copy of the co-text (either selected text or the whole paragraph) as content.
- PassThru [*inherited*, true, false] Whether the contents of this argument should be output in raw form, meaning without special translations that LATEX would require. By default, the PassThru status is inherited by the inset or paragraph layout the argument belongs to, true and false change the status for the given argument only.

- PassThruChars [string of characters] Defines individual characters that should be output in raw form, meaning without special translations that IAT_EX would require. Note that, contrary to PassThru, this needs to be explicitly defined for arguments. That is, arguments do not inherit PassThruChars from their parent inset or layout.
- IsTocCaption [0, 1] If this is set to 1, the argument will output its content in the corresponding item in the table of contents. See AddToToc.

By default, the text entered in the L_YX workarea in the respective layout is the last (mandatory) argument of a command if the LatexType is Command. However, arguments with the prefix post: are output after this workarea argument. Note that post-argument numbering restarts at 1, so the first argument following the workarea argument is post:1. Post-arguments are ignored in any other LatexType than Command.

Arguments for list \items (as in \item[foo]) have the prefix item: followed by the number (e.g. Argument item:1).

Finally, there is a special argument type with the prefix listpreamble:. It is not really an argument, but uses the argument interface (thus, the prefix is also followed by a number, e.g. Argument listpreamble:1). As the name implies, it is targeted at lists such as Itemize, Enumerate, Description, or Bibliography. Its content will be output at the list start, before the first item, on an own line (a place that is otherwise not accessible in L_YX). This way, users can insert redefinitions (of lengths etc.) to individual lists. By default, these arguments do not have a delimiter.

5.3.12. Counters

It is necessary to define the counters (CHAPTER, FIGURE, ...) in the text class itself. The standard counters are defined in the file stdcounters.inc, so you may have to do no more than add

```
Input stdcounters.inc
```

to your layout file to get them to work. But if you want to define custom counters, then you can do so. The counter declaration must begin with:

Counter CounterName

where of course 'CounterName' is replaced by the name of the counter. And it must end with "End". The following parameters can also be used:

- InitialValue [int=1] Sets the initial value for the counter, to which it will be reset
 whenever that happens. Normally, one will want the default, 1.
- LabelString [string=""] When defined, this string defines how the counter is displayed. Setting this value sets LabelStringAppendix to the same value. The following special constructs can be used in the string:

- \thecounter will be replaced by the expansion of the LabelString (or LabelStringAppendix) of the counter counter.
- counter values can be expressed using LATEX-like macros \numbertype {counter}, where numbertype can be:¹⁹ arabic: 1, 2, 3,...; alph for lower-case letters: a, b, c, ...; Alph for upper-case letters: A, B, C, ...; roman for lower-case roman numerals: i, ii, iii, ...; Roman for upper-case roman numerals: I, II, III...; hebrew for hebrew numerals.

If LabelString is not defined, a default value is constructed as follows: if the counter has a parent counter parent (defined via Within), the string

\theparent.\arabic{counter} is used; otherwise the string \arabic{counter} is used.

- LabelStringAppendix [string=""] Same as LabelString, but for use in the Appendix.
- LaTeXName [string = ""] The counter name as used in LATEX. (e.g., in LyX, there is a counter named 'theorem', but it is output to LATEX as 'thm'.)
- PrettyFormat [string=""] A format for use with formatted references to this counter. For example, one might want to have references to section numbers appear as "Section 2.4". The string may contain "##" or a counter specification as in LabelString. The former will be replaced by the counter number itself. So, for sections, it would be: Section ##, or perhaps: \S\arabic{section} (which might render as §2.7).
- RefFormat [string, string] For use with 'formatted references', specifically when a single counter is used with multiple sorts of styles. For example, the theorem counter is often used for all sorts of theorem-like environments: Theorem, Lemma, etc. The first argument gives a prefix used in the labels (e.g., "thm" or "lem"), and the second a formatting string, as for LabelString or PrettyFormat. If this is not given, then PrettyFormat is used.
- Within [string=""] If this is set to the name of another counter, the present counter
 will be reset every time the other one is increased. For example, subsection
 is numbered inside section.

5.3.13. Font description

A font description looks like this:

```
Font or LabelFont or DefaultFont
...
EndFont
```

¹⁹Actually, the situation is a bit more complicated: any *numbertype* other than those described below will produce arabic numerals. It would not be surprising to see this change in the future.

The following commands are available:

Color [string] See appendix Appendix B for valid arguments.

Family [Roman, Sans, Typewriter]

Misc [string] Valid arguments are: emph, noun, strikeout, underbar, uuline, uwave, no_emph, no_noun, no_strikeout, no_bar, no_uuline and no_uwave. Each of these turns on or off the corresponding attribute. For example, emph turns on emphasis, and no_emph turns it off.

If the latter seems puzzling, remember that the font settings for the present context are generally inherited from the surrounding context. So **no_emph** would turn off the emphasis that was anyway in effect, say, in a theorem environment.

Series [Medium, Bold]

Shape [Up, Italic, SmallCaps, Slanted]

Size [tiny, small, normal, large, larger, largest, huge, giant]

5.3.14. Cite engine description

The CiteEngine blocks, as used mainly in cite engine files (see sec. 5.2.6), define the citation commands provided by a specific "cite engine". A cite engine, in L_YX terms, is way specific way to format citations, using numbers, author names and/or years. Currently, L_YX supports three such engine types, namely:

- 1. default: the default BibT_EX way to format citations, a simple numeric style (e.g., "[1]")
- 2. authoryear: Harvard-styled citations using author names and publication year (e.g., "Smith and Miller (2017b)")
- 3. numerical: extended numerical citations that also allow for author or title next to the number (e.g., "Smith and Miller [1]")

CiteEngine blocks look like this:

```
CiteEngine default
  cite
  Citep*[][]
  citeyearpar[][]=parencite*
  ...
End
```

The tag following <code>CiteEngine</code> denotes the engine. The individual lines respectively define a cite command or cite command paradigm supported by this engine. The line can be as simple as a cite command that is used both to name the respective LYX command and the $\[Mathbb{L}^{A}T_{E}X$ output or more complex in order to differentiate things. The full syntax is:

LyXName|alias\$*<!_stardesc!_stardesctooltip>[][]=latexcmd

• LyXName: The name as used in the *.lyx file.

For portability reasons, we try to use the same name for same-formatted commands in different cite packages (thus many names stem from natbib, and thus we need to differentiate a latexcmd sometimes, if the $\[MTex]$ command names differ).

- alias: a (comma-separated) list of commands that fall back to the given LyXName in the current engine. This eases the switch of citation packages and engines. The alias can be compared to ObsoletedBy in layout definitions.
- latexcmd: The actual LATEX command that is output.

Alias and latexcmd are optional. If no latexcmd is given, the LyXName will be output to $I\!\!\!\!^{A}T_{E}\!X.$

Note further:

- Capitalization indicates that the command also has a capitalized form (\Latexcmd vs. \latexcmd). These usually enforce up-casing of name prefixes (von Goethe ⇒ Von Goethe).
- Brackets [] indicate the number of optional arguments (there can be 0–2).
- A star * indicates there is a starred version of the command (\latexcmd* vs. \latexcmd).

By default, the starred version means: Output all authors even if it should be shortened with "et al." due to the MaxCiteNames threshold.

If the star has a different meaning for a given command, it can be specified in angle brackets: <!_stardesc!_stardesctooltip>. Maximal two translatable macro keywords, marked by the prefix !_, can be given. The first points to the string that replaces the "Full aut&hor list" checkbox label in the citation dialog, the second one to an optional tool tip for this checkbox.

Note that these two macros have to be defined in a CiteFormat (see next section), dropping the ! from the prefix, like this:

_stardesc Sta&rred command label _stardesctooltip Tooltip for the starred command checkbox. • A dollar sign \$ indicates that this command features "qualified citation lists". This is a Biblatex-specific feature for multi-reference citations where an individual pre- and postnote can be given to each reference in the list. Please refer to the Biblatex manual for details.

If you want to add a cite command to a cite engine (e.g., add a specific command provided by a class), you can use AddToCiteEngine <engine type> ... End. Note that only cite commands that do not exist yet are added.

5.3.15. Cite format description

The CiteFormat blocks are used to describe how bibliographic information should be displayed, both within L_YX itself (in the citation dialog and in tooltips, for example) and in XHTML output. Such a block might look like this:

```
CiteFormat
article ...
book ...
End
CiteFormat
```

or

```
cite ...
citet*[][] ...
End
```

In the first case, the individual lines define how the bibliographic information associated with an article or book, respectively, is to be displayed, and such a definition can be given for any 'entry type' that might be present in a $BibT_EX$ file. LyX defines a default format in the source code that will be used if no specific definition has been given. LyX predefines several formats in the file stdciteformats.inc, which is included in most of LyX's document classes.

In the second case, the lines define how a specific citation command (in the example \cite, \citet) is to be displayed on the citation inset label, in the citation dialog, menu or XHTML output. LyX defines such formats for the citation style variants it supports via Document > Setting > Bibliography... in specific *.citeengine files that are shipped with LyX (see sec. 5.2.6).

The definitions use a simple language that allows BibT_EX keys to be replaced with their values. Keys should be enclosed in % signs, e.g.: %author%. So a simple definition might look like this:

misc %author%, "%title%".

This would print the author, followed by a comma, followed by the title, in quotes, followed by a period.

Of course, sometimes you may want to print a key only if it exists. This can be done by using a conditional construction, such as: {%volume%[[vol. %volume%]]}. This says: If the volume key exists, then print "vol. " followed by the volume key. It is also possible to have an else clause in the conditional, such as:

{%author%[[%author%]][[%editor%, ed.]]}.

Here, the **author** key is printed if it exists; otherwise, the editor key is printed, followed by ", ed." Note that the key is again enclosed in % signs; the entire conditional is enclosed in braces; and the if and else clauses are enclosed in double brackets, "[[" and "]]". There must be no space between any of these.

Next to the entry keys, there are some special keys that can be used for these conditionals:

- {%dialog%[[true]][[false]]}: process the "true" part for dialogs and menus, the "false" part for other contexts (workarea, export)
- {%export%[[true]][[false]]}: process the "true" part for export and menus, the "false" part for other contexts (workarea, dialog)
- {%next%[[true]]}: process the "true" part if another item follows (e.g., in a citation with multiple keys)
- {%second%[[true]][[false]]}: process the "true" if this is the second of multiple items, else the "false" part
- {%ifstar%[[true]][[false]]}: process the "true" part for starred citation commands (such as \cite*), the false part for unstarred
- {%ifentrytype:<type>%[[true]] [[false]]}: process the "true" if the current entry type matches <type>, else the false part (e.g., in a citation definition: {%ifentrytype:book%[[this is a book]][[this is no book]]})
- {%ifmultiple:<authortype>%[[true]][[false]]}: process the "true" if the current author type (author, editor etc.) has multiple authors, else the false part (e.g., in a bibliography definition: {%ifmultiple:editor%[[eds.]][[ed.]]})
- {%ifqualified%[[true]][[false]]}: process the "true" part if the current citation is a qualified citation list (a specific Biblatex format for multi-reference citations), the false part if this is not the case.

We said that **%author%** prints the author key as it is recorded in the bibliography file. This might not be what you want, since it will result in a string such as "Miller, Peter and Smith, Mary and White, Jane" (since "and" is used by BibT_EX to delimit authors). L_YX therefore provides some methods to get properly formatted name lists (which will also get translated). The following keys are provided:

5. Installing New Document Classes

- 1. For name lists with pre- and surname, suitable for the main authors/editors of a bibliography item. The <nametype> part denotes the kind of list that is requested (e.g. <nametype:author>):
 - %abbrvnames:<nametype>%: Provides a name list which is abbreviated (with "et al.") when MaxCiteNames is reached.
 - %fullnames:<nametype>%: Provides a full name list (never abbreviated with "et al.").
 - %forceabbrvnames:<nametype>%: Provides a name list which is always abbreviated (with "et al.") irrespective of MaxCiteNames.
- 2. Alternative name lists with pre- and surname, if the order of pre- and surname inside the bibliography item differs (as in: "Miller, John: Some text, in: Mary Smith, ed.: A volume"):
 - %abbrvbynames:<nametype>%: Provides a name list which is abbreviated (with "et al.") when MaxCiteNames is reached.
 - %fullbynames:<nametype>%: Provides a full name list (never abbreviated with "et al.").
 - %forceabbrvbynames:<nametype>%: Provides a name list which is always abbreviated (with "et al.") irrespective of MaxCiteNames.
- 3. And finally name lists which consist of family names only, as used in authoryear citation labels. These do not take a <nametype> part, but always return either an author list or, if this does not exist, an editor list (as common in author-year labels):
 - %abbrvciteauthor%: Provides a name list which is abbreviated (with "et al.") when MaxCiteNames is reached.
 - %fullciteauthor%: Provides a full name list (never abbreviated with "et al.").
 - %forceabbrvciteauthor%: Provides a name list which is always abbreviated (with "et al.") irrespective of MaxCiteNames.

The order of pre- and surname in the former two lists can be adjusted by these macros:

- !firstnameform %surname%, %prename% (first author in lists of type 1)
- !othernameform %surname%, %prename% (other authors in lists of type 1)
- !firstbynameform %prename% %surname% (first author in lists of type 2)
- !otherbynameform %prename% %surname% (other authors in lists of type 2)

This allows you to configure namings like "Miller, Peter and Mary Smith: ..., in: John Doe and Pat Green, eds....".

There is one other piece of syntax available in definitions, which looks like this: {!<i>!}. This defines a piece of formatting information that is to be used when creating "rich text". Obviously, we do not want to output HTML tags when writing plain text, so they should be wrapped in "{!" and "!}".

Two special sorts of definitions are also possible in a CiteFormat block. An example of the first would be:

!quotetitle "%title%"

This is an abbreviation, or macro, and it can be used by treating it as if it were a key: %!quotetitle%. LyX will treat %!quotetitle% exactly as it would treat its definition. So, let us issue the obvious *warning*. Do not do this:

!funfun %funfun%

or anything like it. L_YX shouldn't go into an infinite loop, but it may go into a long one before it gives up.

The second sort of special definition might look like this:

B_pptext pp.

This defines a translatable piece of text, which allows relevant parts of the bibliography or citation to be translated. It can be included in a definition by treating it as a key: <code>%B_pptext%</code>. Note that there are two different translation paths: All definitions starting with B_, such as in the example above, will be translated to the currently active buffer language (so the translation will match the generated document). All definitions starting with underscore only will be translated to the GUI language. This is the proper translation for strings that only occur in the dialogs or on buttons, such as this one:

_addtobib Add to bibliography only.

Several of these translatable strings are predefined in stdciteformats.inc and the diverse *.citeengine files. Note that these are not macros, in the sense just defined. They will not be expanded.

So here then is an example that uses several of these features:

!authoredit {%author%[[%author%,]][[{%editor%[[%editor%, %B_edtext%,]]}]]}

This defines a macro that prints the author, followed by a comma, if the author key is defined, or else prints the name of the editor, followed by the B_edtext or its translation (it is by default "ed."), if the editor key is defined. Note that this is in fact defined in stdciteformats.inc, so you can use it in your own definitions, or re-definitions, if you load that file first.

5.4. Tags for XHTML output

As with LATEX or DocBook, the format of LYX's XHTML output is also controlled by layout information. In general, LYX provides sensible defaults and, as mentioned earlier, it will even construct default CSS style rules from the other layout tags. For example, LYX will attempt to use the information provided in the Font declaration for the Chapter style to write CSS that will appropriately format chapter headings.

In many cases, then, you may not have to do anything at all to get acceptable XHTML output for your own environments, custom insets, and so forth. But in some cases you will, and so L_YX provides a number of layout tags that can be used to customize the XHTML and CSS that are generated.

Note that there are two tags, HTMLPreamble and AddToHTMLPreamble that may appear outside style and inset declarations. See sec. 5.3.5 for details on these.

5.4.1. Paragraph styles

The sort of XHTML L_YX outputs for a paragraph depends upon whether we are dealing with a normal paragraph, a command, or an environment, where this is itself determined by the contents of the corresponding **EqXType** tag.

For a command or normal paragraph, the output XHTML has the following form:

```
<tag attr="value">
<labeltag attr="value">Label</labeltag>
Contents of the paragraph.
</tag>
```

The label tags are of course omitted if the paragraph does not have a label. For an environment that is not some sort of list, the XHTML takes this form:

```
<tag attr="value">
<itemtag attr="value"><labeltag attr="value">Environment La-
bel</labeltag>First paragraph.</itemtag>
<itemtag>Second paragraph.</itemtag>
</tag>
```

Note that the label is output only for the first paragraph, as it should be for a theorem, for example.

For a list, we have one of these forms:

```
<tag attr="value">
<itemtag attr="value"><labeltag attr="value">List La-
bel</labeltag>First item.</itemtag>
<itemtag attr="value"><labeltag attr="value">List La-
bel</labeltag>Second item.</itemtag>
</tag>
```

<tag attr="value"> <labeltag attr="value">List Label</labeltag><itemtag attr="value">First item.</itemtag> <labeltag attr="value">List Label</labeltag><itemtag attr="value">Second item.</itemtag> </tag>

Note the different orders of labeltag and itemtag. Which order we get depends upon the setting of HTMLLabelFirst: If HTMLLabelFirst is false (the default), you get the first of these, with the label within the item; if true, you get the second, with the label outside the item.

The specific tags and attributes output for each paragraph type can be controlled by means of the layout tags we are about to describe. As mentioned earlier, however, L_YX uses sensible defaults for many of these, so you often may not need to do very much to get good XHTML output. Think of the available tags as there so you can tweak things to your liking.

- HTMLAttr [string] Specifies attribute information to be output with the main tag. For example, "class='mydiv'". By default, LYX will output "class='layoutname'", where layoutname is the LYX name of the layout, made lowercase, for example: chapter. This should *not* contain any style information. Use HTMLStyle for that purpose.
- HTMLClass [string] The CSS class to use for this paragraph. Note that, if the paragarph is of enumerate or itemize type, then the default will be "lyxenum" or "lyxitem", plus "i", "ii", "iii", or "iv", depending upon the depth. That can be over-ridden here. However, the suffix will not be added in that case. I.e., the CSS class will always be exactly what it is declared to be here.
- HTMLForceCSS [0,1] Whether to output the default CSS information L_YX generates for this layout, even if additional information is explicitly provided via HTMLStyle. Setting this to 1 allows you to alter or augment the generated CSS, rather than to override it completely. Default is 0.
- **HTMLInToc** [0, 1] Whether to include this paragraph (usually, a section or something of the sort) in the TOC. By default, true, so it should be set to false e.g. for starred sections.
- HTMLItem [string] The tag to be used for individual paragraphs of environments, replacing itemtag in the examples above. Defaults to div.

- HTMLLabel [string] The tag to be used for paragraph and item labels, replacing labeltag in the examples above. Defaults to span, unless LabelType is either Top_Environment or Centered_Top_Environment, in which case it defaults to div.

- HTMLPreamble Information to be output in the <head> section when this style is used. This might, for example, be used to include a <script> block defining an onclick handler.
- HTMLStyle CSS style information to be included when this style is used. Note that this will automatically be wrapped in a layout-generated <style> block, so only the CSS itself need be included. Must end with EndHTMLStyle.
- HTMLTag [string] The tag to be used for the main label, replacing tag in the examples above. Defaults to div.
- HTMLTitle [0,1] Marks this style as the one to be used to generate the <title> tag
 for the XHTML file. By default, it is false. The stdtitle.inc file sets it to
 true for the title environment.

5.4.2. InsetLayout XHTML

The XHTML output of insets can also be controlled by information in layout files.²⁰ Here, too, L_YX tries to provide sensible defaults, and it constructs default CSS style rules. But everything can be customized.

The XHTML L_YX outputs for an inset has the following form:

```
<tag attr="value">
<labeltag>Label</labeltag>
<innertag attr="value">Contents of the inset.</innertag>
</tag>
```

If the inset permits multiple paragraphs—that is, if MultiPar is true—then the contents of the inset will itself be output as paragraphs formatted according to the styles used for those paragraphs (standard, quote, and the like). The label tag is of

²⁰At present, this is true only for "text" insets (insets you can type into) and is not true for "command" insets (insets that are associated with dialog boxes).

course omitted if the paragraph does not have a label and, at present, is always **span**. The inner tag is optional and, by default, does not appear.

The specific tags and attributes output for each inset can be controlled by means of the following layout tags.

- HTMLAttr [string] Specifies attribute information to be output with the main tag. For example, "class='myinset' onclick='...'". By default, L_YX will output "class='insetname'", where insetname is the L_YX name of the inset, made lowercase and with non-alphanumeric characters converted to underscores, for example: footnote.
- HTMLForceCSS [0,1] Whether to output the default CSS information L_YX generates for this layout, even if additional information is explicitly provided via HTMLStyle. Setting this to 1 allows you to alter or augment the generated CSS, rather than to override it completely. Default is 0.
- HTMLInnerTag [string] The inner tag, replacing innertag in the examples above. By default, there is none.
- HTMLIsBlock [0, 1] Whether this inset represents a standalone block of text (such as a footnote) or instead represents material that is included in the surrounding text (such as a branch). Defaults to 1.
- HTMLLabel [string] A label for this inset, possibly including a reference to a counter. For example, for footnote, it might be: \arabic{footnote}. This is optional, and there is no default.
- **HTMLPreamble** Information to be output in the <head> section when this style is used. This might, for example, be used to include a <script> block defining an onclick handler.
- HTMLStyle CSS style information to be included when this style is used. Note that this will automatically be wrapped in a layout-generated <style> block, so only the CSS itself need be included.
- HTMLTag [string] The tag to be used for the main label, replacing tag in the examples above. The default depends upon the setting of MultiPar: If MultiPar is true, the default is div; if it is false, the default is span.

5.4.3. Float XHTML

The XHTML output for floats too can be controlled by layout information. The output has the following form:

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<tag attr="value"> Contents of the float. </tag>

The caption, if there is one, is a separate inset and will be output as such. Its appearance can be controlled via the InsetLayout for caption insets.

- HTMLAttr [string] Specifies attribute information to be output with the main tag. For example, "class='myfloat' onclick='...'". By default, L_YX will output "class='float float-floattype'", where floattype is L_YX's name for this type of float, as determined by the float declaration (see sec. 5.3.9), though made lowercase and with non-alphanumeric characters converted to underscores, for example: float-table.
- HTMLStyle CSS style information to be included when this float is used. Note that this will automatically be wrapped in a layout-generated <style> block, so only the CSS itself need be included.
- HTMLTag [string] The tag to be used for this float, replacing "tag" in the example above. The default is div and will rarely need changing.

5.4.4. Bibliography formatting

The bibliography can be formatted using CiteFormat blocks. See sec. 5.3.15 for the details.

5.4.5. LyX-generated CSS

We have several times mentioned that L_YX will generate default CSS style rules for both insets and paragraph styles, based upon the other layout information that is provided. In this section, we shall say a word about which layout information L_YX uses and how.

At present, L_YX auto-generates CSS only for font information, making use of the Family, Series, Shape, and Size specified in the Font declaration (see sec. 5.3.13). The translation is mostly straightforward and obvious. For example, "Family Sans" becomes "font-family: sans-serif;". The correspondence of L_YX sizes and CSS sizes is a little less obvious but nonetheless intuitive. See the getSizeCSS() function in src/FontInfo.cpp for the details.

5.5. Tags for DocBook output

As with $E^{T}E^{X}$ or XHTML, the format of LYX's DocBook output is also controlled by layout information. In general, LYX provides sensible defaults; however, much of the styling is lost during the conversion, as DocBook is strictly semantic and does not allow formatting. When possible, information from LyX will be rendered in role attributes.

In many cases, then, you may not have to do anything at all to get acceptable DocBook output for your own environments, custom insets, and so forth. But in some cases you will, and so L_YX provides a number of layout tags that can be used to customize the DocBook that is generated.

Labels are rarely output, as they are redundant in DocBook: this information is carried by the tags themselves, and whether labels appear in the final documents (after processing of DocBook files) is controlled by the stylesheets. However, sometimes, labels are not redundant content, such as definition lists: in this case, the term being defined will be the label.

5.5.1. Paragraph styles

The sort of DocBook L_YX outputs for a paragraph depends upon whether we are dealing with a normal paragraph, a command, or an environment, where this is itself determined by the contents of the corresponding EleXType tag.

For a command or normal paragraph, the output DocBook has the following form:

```
<tag attr>
Contents of the paragraph.
</tag>
```

For an environment that is not some sort of list, the generated DocBook takes this form:

```
<tag attr>
<itemtag>First paragraph.</itemtag>
<itemtag>Second paragraph.</itemtag>
</tag>
```

For a list, the resulting DocBook takes this form:

```
<tag attr>
<itemtag attr>First item.</itemtag>
<itemtag attr>Second item.</itemtag>
</tag>
```

The specific tags and roles output for each paragraph type can be controlled by means of the layout tags we are about to describe. Please note that, due to the very nature of DocBook, no sensible defaults really exist, and the values must always be carefully chosen.

DocBookAttr [string] Specifies attribute information to be output with the main tag, replacing "attr" in the example above. This information can be used in further processing of the DocBook files.

- **DocBookTag** [string] The tag to be used for this inset, replacing "tag" in the example above. The default is the name of the float and always needs to be changed, as DocBook provides no generic tag.
- **DocBookTagType** [block, paragraph, inline] The new-line policy for this tag, see Section sec. 5.5.2 for the details.

5.5.2. New-line policy

For all tags, there are three possible policies for outputting new lines (given in the DocBook*TagType attribute):

• "block": the opening and closing tags are on their own lines (i.e. a line feed after and before the opening and the closing tags). Typical elements are floats. For instance:

```
Content before
<blocktag>
Contents of the block.
</blocktag>
Content after
```

• "paragraph": the opening and closing tags are on the same, new line; a line feed is output before the opening tag and after the closing tag. Typical elements are paragraphs and list items. For instance:

```
Content before
<paratag>Contents of the paragraph.</paratag>
Content after
```

• "inline": the opening and closing tags are on the same line as the rest of the content. No line feeds are output. Typical elements are fonts. For instance:

Content before <inlinetag>Contents of the paragraph. </inlinetag>Content after

The default value is always "block".

5.5.3. InsetLayout DocBook

The DocBook output of insets can also be controlled by information in layout files. The DocBook LyX outputs for an inset has the following form:

```
<wrappertag wrapperattr>
    <tag attr>
        <innertag innerattr>
            Contents of the inset.
            </innertag>
        </tag>
</wrappertag>
```

For an itemising inset, it rather looks like this:

```
<wrappertag wrapperattr>
  <tag attr>
    <innertag innerattr>
      <itemwrappertag itemwrapperattr>
        <itemlabeltag itemattr>
          Label of the first item.
        </itemtag>
        <itemtag itemattr>
          <itemtag itemattr>
            Contents of the first item.
          </itemtag>
        </itemtag>
      </itemwrappertag>
      <itemwrappertag itemwrapperattr>
        <itemlabeltag itemattr>
          Label of the second item.
        </itemtag>
        <itemtag itemattr>
          <itemtag itemattr>
            Contents of the second item.
          </itemtag>
        </itemtag>
      </itemwrappertag>
      . . .
    </innertag>
  </tag>
</wrappertag>
```

If the inset permits multiple paragraphs—that is, if MultiPar is true—then the contents of the inset will themselves be output as paragraphs formatted according to the styles used for those paragraphs (standard, quote, and the like). The inner tag is optional and, by default, does not appear.

The specific tags and attributes output for each inset can be controlled by means of the following layout tags.

- **DocBookAttr** [string] Specifies attribute information to be output with the main tag, replacing "attr" in the example above. This information can be used in further processing of the DocBook files.
- DocBookInInfo [never, always, maybe] Specifies whether this tag goes into the <info> tag at the beginning of the parent layout. never indicates that the tag never goes into <info> (this is default value, and corresponds to usual content). always indicates that the tag always goes into <info> (this corresponds to usual metadata): if there is no <info> tag for the parent, one will be generated. maybe indicates that the tag may go into <info> (this is only the case for titles): if there is no <info> tag for the parent, none will be generated, the corresponding tag will be output directly as content.
- **DocBookItemAttr** [string] Specifies attribute information to be output with the item tag, replacing "itemattr" in the example above. This information can be used in further processing of the DocBook files.
- **DocBookItemInnerAttr** [string] Specifies attribute information to be output with the item inner tag, replacing "iteminnerattr" in the example above. This information can be used in further processing of the DocBook files.
- DocBookItemInnerTag [string] The tag to be used for the item inner tag within the inset, replacing "iteminnertag" in the example above. The default is NONE, indicating that there is no item inner tag: content is directly output without it for each itemised element. This parameter only makes sense when itemising layouts are used, such as lists. The most likely value is "para". When a list item is split using a new line, the item inner tag will be repeated

for each part of the paragraph, parts being separated by new lines.

- **DocBookItemInnerTagType** [block, paragraph, inline] The new-line policy for this tag, see Section sec. 5.5.2 for the details.
- **DocBookItemLabelAttr** [string] Specifies attribute information to be output with the item label tag, replacing "itemlabelattr" in the example above. This information can be used in further processing of the DocBook files.
- DocBookItemLabelTag [string] The tag to be used for the item label tag within the inset, replacing "itemlabeltag" in the example above. This parameter only makes sense when itemising layouts are used with a notion of labels, such as definition lists.
- **DocBookItemLabelTagType** [block, paragraph, inline] The new-line policy for this tag, see Section sec. 5.5.2 for the details.
- DocBookItemTag [string] The tag to be used for the item tag within the inset, replacing "itemtag" in the example above. The default is NONE, indicating

that there is no item tag. This parameter only makes sense when itemising layouts are used, such as lists.

- **DocBookItemTagType** [block, paragraph, inline] The new-line policy for this tag, see Section sec. 5.5.2 for the details.
- DocBookItemWrapperAttr [string] Specifies attribute information to be output with the item wrapper tag, replacing "itemwrapperattr" in the example above. This information can be used in further processing of the DocBook files.
- DocBookItemWrapperTag [string] The tag to be used for the item wrapper tag within the inset, replacing "itemwrappertag" in the example above. The default is NONE, indicating that there is no item wrapper tag: tag and content are directly output without it for each itemised element. This parameter only makes sense when itemising layouts are used, such as lists.
- **DocBookItemWrapperTagType** [block, paragraph, inline] The new-line policy for this tag, see Section sec. 5.5.2 for the details.
- **DocBookInnerAttr** [string] Specifies attribute information to be output with the inner tag, replacing "innerattr" in the example above. This information can be used in further processing of the DocBook files.
- **DocBookInnerTag** [string] The tag to be used for the inner tag within the inset, replacing "innertag" in the example above. The default is NONE, indicating that there is no inner tag: content is directly output without it.
- **DocBookInnerTagType** [block, paragraph, inline] The new-line policy for this tag, see Section sec. 5.5.2 for the details.
- **DocBookSectionTag** [string] Specifies the tag that corresponds to this kind of section. This parameter only makes sense for sectioning elements (part, chapter, section, etc.). The default value is section, and is only overridden when DocBook uses something else for sectioning (typically, parts and chapters of a book).
- **DocBookTag** [string] The tag to be used for this inset, replacing "tag" in the example above. The default is the name of the float and always needs to be changed, as DocBook provides no generic inset tag.
- **DocBookTagType** [block, paragraph, inline] The new-line policy for this tag, see Section sec. 5.5.2 for the details.
- **DocBookWrapperAttr** [string] Specifies attribute information to be output with the outer wrapper tag, replacing "wrapperattr" in the example above. This information can be used in further processing of the DocBook files.

- DocBookWrapperTag [string] The tag to be used for the wrapper tag around the inset, replacing "wrappertag" in the example above. The default is NONE, indicating that there is no wrapper tag: tag and content are directly output without it.
- **DocBookWrapperTagType** [block, paragraph, inline] The new-line policy for this tag, see Section sec. 5.5.2 for the details.

5.5.4. Float DocBook

The DocBook output for floats too can be controlled by layout information. The output has the following form:

```
<tag attr>
Contents of the float as DocBook.
</tag>
```

The caption, if there is one, is a separate inset and will be output as a title.

- **DocBookAttr** [string] Specifies attribute information to be output with the main tag, replacing "attr" in the example above. This information can be used in further processing of the DocBook files.
- **DocBookTag** [string] The tag to be used for this float, replacing "tag" in the example above. The default is the name of the float and always needs to be changed, as DocBook provides no generic float tag.

5.5.5. Bibliography formatting

Included bibliographies cannot be formatted: all fields are always output in the database-like DocBook format (equivalent to a BibTeX file), using the biblioentry tag.

When the bibliographic entries are manually inserted into the LyX document as Bibliography Items, the user deals with formatting themself: there is no attempt of parsing what the user wrote, the string is directly used (with the bibliomixed tag).

6. Including External Material

WARNING: This portion of the documentation has not been updated for some time. We certainly hope that it is still accurate, but there are no guarantees.

The use of material from sources external to L_YX is covered in detail in the *Embedded Objects* manual. This part of the manual covers what needs to happen behind the scenes for new sorts of material to be included.

6.1. How does it work?

The external material feature is based on the concept of a *template*. A template is a specification of how L_YX should interface with a certain kind of material. As bundled, L_YX comes with predefined templates for Xfig figures, various raster format images, chess diagrams, and LilyPond music notation. You can check the actual list by using the menu INSERT \triangleright FILE \triangleright EXTERNAL MATERIAL. Furthermore, it is possible to roll your own template to support a specific kind of material. Later we'll describe in more detail what is involved, and hopefully you will submit all the templates you create so we can include them in a later L_YX version.

Another basic idea of the external material feature is to distinguish between the original file that serves as a base for final material and the produced file that is included in your exported or printed document. For example, consider the case of a figure produced with Xfig. The Xfig application itself works on an original file with the .fig extension. Within Xfig, you create and change your figure, and when you are done, you save the fig-file. When you want to include the figure in your document, you invoke transfig in order to create a PostScript file that can readily be included in your LATEX file. In this case, the .fig file is the original file, and the PostScript file is the produced file.

This distinction is important in order to allow updating of the material while you are in the process of writing the document. Furthermore, it provides us with the flexibility that is needed to support multiple export formats. For instance, in the case of a plain text file, it is not exactly an award-winning idea to include the figure as raw PostScript. Instead, you would either prefer to just include a reference to the figure or try to invoke some graphics to ASCII converter to make the final result look similar to the real graphics. The external material management allows you to do this, because it is parametrized on the different export formats that L_YX supports.

Besides supporting the production of different products according to the exported format, it supports tight integration with editing and viewing applications. In the case of an Xfig figure, you are able to invoke Xfig on the original file with a single click from within the external material dialog in L_YX, and also preview the produced PostScript file with Ghostview with another click. No more fiddling around with the command line and/or file browsers to locate and manipulate the original or produced files. In this way, you are finally able to take full advantage of the many different applications that are relevant to use when you write your documents, and ultimately be more productive.

6.2. The external template configuration files

It is relatively easy to add custom external template definitions to $L_{Y}X$. However, be aware that doing this in an careless manner most probably *will* introduce an easily exploitable security hole. So before you do this, please read the discussion about security in sec. 6.4.

Having said that, we encourage you to submit any interesting templates that you create.

The external templates are defined in the *.xtemplate files that are stored in the LyXDir/lib/xtemplates/ directory. Each template is defined in a file of its own. You can place your own templates in UserDir/xtemplates/ or copy existing templates to that directory in order to modify them.

A typical template looks like this:

```
Template XFig
GuiName "XFig: $$AbsOrRelPathParent$$Basename"
HelpText
An XFig figure.
HelpTextEnd
InputFormat fig
FileFilter "*.fig"
AutomaticProduction true
Transform Rotate
Transform Resize
Format LaTeX
TransformCommand Rotate RotationLatexCommand
TransformCommand Resize ResizeLatexCommand
Product "$$RotateFront$$ResizeFront
         \\input{$$AbsOrRelPathMaster$$Basename.pstex_t}
         $$ResizeBack$$RotateBack"
UpdateFormat pstex
UpdateResult "$$AbsPath$$Basename.pstex_t"
Requirement "graphicx"
ReferencedFile latex "$$AbsOrRelPathMaster$$Basename.pstex t"
ReferencedFile latex "$$AbsPath$$Basename.eps"
```

```
ReferencedFile dvi "$$AbsPath$$Basename.eps"
FormatEnd
Format PDFLaTeX
TransformCommand Rotate RotationLatexCommand
TransformCommand Resize ResizeLatexCommand
Product "$$RotateFront$$ResizeFront
         \\input{$$AbsOrRelPathMaster$$Basename.pdftex t}
         $$ResizeBack$$RotateBack"
UpdateFormat pdftex
UpdateResult "$$AbsPath$$Basename.pdftex t"
Requirement "graphicx"
ReferencedFile latex "$$AbsOrRelPathMaster$$Basename.pdftex t"
ReferencedFile latex "$$AbsPath$$Basename.pdf"
FormatEnd
Format Ascii
Product "[XFig: $$FName]"
FormatEnd
Format DocBook
Product "<graphic fileref=\"$$AbsOrRelPathMaster$$Basename.eps\">
         </graphic>"
UpdateFormat eps
UpdateResult "$$AbsPath$$Basename.eps"
ReferencedFile docbook "$$AbsPath$$Basename.eps"
ReferencedFile docbook-xml "$$AbsPath$$Basename.eps"
FormatEnd
TemplateEnd
```

As you can see, the template is enclosed in **Template** ... **TemplateEnd**. It contains a header specifying some general settings and, for each supported primary document file format, a section Format ... FormatEnd.

6.2.1. The template header

- AutomaticProduction true|false Whether the file represented by the template must be generated by L_YX. This command must occur exactly once.
- FileFilter <pattern> A glob pattern that is used in the file dialog to filter out the desired files. If there is more than one possible file extension (e.g. tgif has .obj and .tgo), use something like "*.{obj,tgo}". This command must occur exactly once.
- **GuiName <guiname>** The text that is displayed on the button. This command must occur exactly once.

- HelpText <text> HelpTextEnd The help text that is used in the External dialog. Provide enough information to explain to the user just what the template can provide him with. This command must occur exactly once.
- InputFormat <format> The file format of the original file. This must be the name of a format that is known to LyX (see sec. 3.1). Use "*" if the template can handle original files of more than one format. LyX will attempt to interrogate the file itself in order to deduce its format in this case. This command must occur exactly once.
- **Template** <id> A unique name for the template. It must not contain substitution macros (see below).
- Transform Rotate|Resize|Clip|Extra This command specifies which transformations are supported by this template. It may occur zero or more times. This command enables the corresponding tabs in the external dialog. Each Transform command must have either a corresponding TransformCommand or a TransformOption command in the Format section. Otherwise the transformation will not be supported by that format.

6.2.2. The Format section

- Format LaTeX|PDFLaTeX|PlainText|DocBook|XHTML The primary document file format that this format definition is for. Not every template has a sensible representation in all document file formats. Please define nevertheless a Format section for all templates. Use a dummy text when no representation is available. Then you can at least see a reference to the external material in the exported document.
- Option <name> <value> This command defines an additional macro \$\$<name> for substitution in Product. <value> itself may contain substitution macros. The advantage over using <value> directly in Product is that the substituted value of \$\$<name> is sanitized so that it is a valid optional argument in the document format. This command may occur zero or more times.
- **Product <text>** The text that is inserted in the exported document. This is actually the most important command and can be quite complex. This command must occur exactly once.
- Preamble <name> This command specifies a preamble snippet that will be included in the LATEX preamble. It has to be defined using PreambleDef ... PreambleDefEnd. This command may occur zero or more times.
- **ReferencedFile <format> <filename>** This command denotes files that are created by the conversion process and are needed for a particular export format. If the filename is relative, it is interpreted relative to the master document. This command may be given zero or more times.

- Requirement <package> The name of a required LATEX package. The package is included via \usepackage{} in the LATEX preamble. This command may occur zero or more times.
- $\label{eq:transformCommand Rotate RotationLatexCommand This command specifies that the built in \ensuremath{\mathrm{ET}_{E}\!X}$ command should be used for rotation. This command may occur once or not at all.
- $\label{eq:transformCommand Resize ResizeLatexCommand} This command specifies that the built in LATEX command should be used for resizing. This command may occur once or not at all.$
- TransformOption Rotate RotationLatexOption This command specifies that rotation is done via an optional argument. This command may occur once or not at all.
- **TransformOption Resize ResizeLatexOption** This command specifies that resizing is done via an optional argument. This command may occur once or not at all.
- TransformOption Clip ClipLatexOption This command specifies that clipping is done via an optional argument. This command may occur once or not at all.
- TransformOption Extra ExtraLatexOption This command specifies that an extra optional argument is used. This command may occur once or not at all.
- UpdateFormat <format> The file format of the converted file. This must be the name of a format that is known to LYX (see the TOOLS ▷ PREFERENCES ▷ FILE HANDLING ▷ FILE FORMAT dialog). This command must occur exactly once. If the resulting file format is PDF, you need to specify the format pdf6. This is the PDF format used for including graphics. The other defined PDF formats are for document export.
- UpdateResult <filename> The file name of the converted file. The file name must be absolute. This command must occur exactly once.

6.2.3. Preamble definitions

The external template configuration file may contain additional preamble definitions enclosed by PreambleDef ... PreambleDefEnd. They can be used by the templates in the Format section.

6.3. The substitution mechanism

When the external material facility invokes an external program, it is done on the basis of a command defined in the template configuration file. These commands can

contain various macros that are expanded before execution. Execution always take place in the directory of the containing document.

Also, whenever external material is to be displayed, the name will be produced by the substitution mechanism, and most other commands in the template definition support substitution as well.

The available macros are the following:

- **\$\$AbsOrRelPathMaster** The file path, absolute or relative to the master L_YX document.
- **\$\$AbsOrRelPathParent** The file path, absolute or relative to the LyX document.
- **\$\$AbsPath** The absolute file path.
- **\$\$Basename** The filename without path and without the extension.
- **\$\$Contents("filename.ext")** This macro will expand to the contents of the file with the name filename.ext.
- **\$\$Extension** The file extension (including the dot).
- **\$\$pngOrjpg** This will be the string "jpg" if the file is in JPEG format, otherwise it will be the string "png". This is useful to avoid uneeded conversions for output formats that support both PNG and JPEG fomats. The predefined RasterImage template uses this macro for the pdfT_EX output format.
- **\$\$FName** The filename of the file specified in the external material dialog. This is either an absolute name, or it is relative to the LyX document.
- **\$\$FPath** The path part of **\$\$FName** (absolute name or relative to the LYX document).
- **\$\$RelPathMaster** The file path, relative to the master LyX document.
- **\$\$RelPathParent** The file path, relative to the LYX document.
- **\$\$Sysdir** This macro will expand to the absolute path of the system directory. This is typically used to point to the various helper scripts that are bundled with L_YX .
- **\$\$Tempname** A name and full path to a temporary file which will be automatically deleted whenever the containing document is closed, or the external material insertion deleted.

All path macros contain a trailing directory separator, so you can construct e.g. the absolute filename with <code>\$\$AbsPath\$\$Basename\$\$Extension</code>.

The macros above are substituted in all commands unless otherwise noted. The command Product supports additionally the following substitutions if they are enabled by the Transform and TransformCommand commands:

\$\$ResizeFront The front part of the resize command.

\$\$ResizeBack The back part of the resize command.

\$\$RotateFront The front part of the rotation command.

\$\$RotateBack The back part of the rotation command.

The value string of the Option command supports additionally the following substitutions if they are enabled by the Transform and TransformOption commands:

\$\$Clip The clip option.

\$\$Extra The extra option.

\$\$Resize The resize option.

\$\$Rotate The rotation option.

You may ask why there are so many path macros. There are mainly two reasons:

- 1. Relative and absolute file names should remain relative or absolute, respectively. Users may have reasons to prefer either form. Relative names are useful for portable documents that should work on different machines, for example. Absolute names may be required by some programs.
- 2. LATEX treats relative file names differently than LYX and other programs in nested included files. For LYX, a relative file name is always relative to the document that contains the file name. For LATEX, it is always relative to the master document. These two definitions are identical if you have only one document, but differ if you have a master document that includes part documents. That means that relative filenames must be transformed when presented to LATEX. Fortunately LYX does this automatically for you if you choose the right macros.

So which path macro should be used in new template definitions? The rule is not difficult:

- Use **\$\$AbsPath** if an absolute path is required.
- Use **\$\$AbsOrRelPathMaster** if the substituted string is some kind of LATEX input.
- Else use **\$\$AbsOrRelPathParent** in order to preserve the user's choice.

There are special cases where this rule does not work and e.g. relative names are needed, but normally it will work just fine. One example for such a case is the command ReferencedFile latex "\$\$AbsOrRelPathMaster\$\$Basename.pstex_t" in the XFig template above: We can't use the absolute name because the copier for .pstex_t files needs the relative name in order to rewrite the file content.

6.4. Security discussion

The external material feature interfaces with a lot of external programs and does so automatically, so we have to consider the security implications of this. In particular, since you have the option of including your own filenames and/or parameter strings and those are expanded into a command, it seems that it would be possible to create a malicious document which executes arbitrary commands when a user views or prints the document. This is something we definitely want to avoid.

However, since the external program commands are specified in the template configuration file only, there are no security issues if $L_{Y}X$ is properly configured with safe templates only. This is so because the external programs are invoked with the execvp-system call rather than the system system-call, so it's not possible to execute arbitrary commands from the filename or parameter section via the shell.

This also implies that you are restricted in what command strings you can use in the external material templates. In particular, pipes and redirection are not readily available. This has to be so if $L_{Y}X$ should remain safe. If you want to use some of the shell features, you should write a safe script to do this in a controlled manner, and then invoke the script from the command string.

It is possible to design a template that interacts directly with the shell, but since this would allow a malicious user to execute arbitrary commands by writing clever filenames and/or parameters, we generally recommend that you only use safe scripts that work with the **execvp** system call in a controlled manner. Of course, for use in a controlled environment, it can be tempting to just fall back to use ordinary shell scripts. If you do so, be aware that you *will* provide an easily exploitable security hole in your system. Of course it stands to reason that such unsafe templates will never be included in the standard LYX distribution, although we do encourage people to submit new templates in the open source tradition. But LYX as shipped from the official distribution channels will never have unsafe templates.

Including external material provides a lot of power, and you have to be careful not to introduce security hazards with this power. A subtle error in a single line in an innocent looking script can open the door to huge security problems. So if you do not fully understand the issues, we recommend that you consult a knowledgeable security professional or the L_YX development team if you have any questions about whether a given template is safe or not. And do this before you use it in an uncontrolled environment.

A. List of supported L_YX functions to be used in layouts

accents amsbsy amscd amsmath amssymb amstext	booktabs calc CJK color covington csquotes	feyn fixltx2e float framed graphicx hhline	listings longtable lyxskak makeidx marvosym mathdesign	natbib nomencl pdfpages pifont pmboxdraw polyglossia	rsphrase setspace shapepar slashed soul splitidx	tfrupee tipa tipx tone txfonts ulem	wasysym wrapfig xargs xcolor xy yhmath
amsthm array	dvipost endnotes	hyperref ifsym	$\mathrm{mathdots}\ \mathrm{mathrsfs}$	prettyref pxfonts	subfig subscript	undertilde units	
ascii	enumitem	ifthen	mhchem	refstyle	tcolorbox	url	
bbding	esint	jurabib	multicol	rotating	textcomp	varioref	
bm	fancybox	latexsym	multirow	rotfloat	textgreek	verbatim	

B. Names of available colors to be used in layouts

The colors listed below are the standard colors and those that you can adjust in the L_YX preferences.

B.1. Color functions

The following are no real colors, but rather act on color definitions:

ignore The color is ignored

inherit The color is inherited

none No particular color – clear or default

B.2. Static colors

These are fixed colors that cannot be customized. Please do *not* use these colors in layout definitions, since they will not work well with some color themes (such as dark themes):

black white blue brown cyan darkgray gray green lightgray

lime

magenta olive orange pink purple red teal violet yellow B.3. Dynamic colors

These are the colors allocated to specific elements in : added_space Added space color addedtext Added text color appendix Appendix marker color background Background color **bookmark** Bookmark indicator color bottomarea Bottom area color branchlabel Label color for branches **buttonbg** Color used for button background buttonframe Color for inset button frames buttonhoverbg Color used for button background under focus buttonhoverbg_broken Color used for broken inset button under focus changebar Changebar color changedtextauthor1 Changed text color author 1 changedtextauthor2 Changed text color author 2 changedtextauthor3 Changed text color author 3

changedtextauthor4 Changed text color author 4 changedtextauthor5 Changed text color author 5 **changedtextcomparison** Changed text color document comparison (workarea) collapsible Collapsible insets text color collapsible frame Collapsible insets framecolor command Text color for command insets commandbg Background color for command insets commandframe Frame color for command insets **command_broken** Text color for broken (reference) insets commandbg_broken Background color for broken insets commandframe_broken Frame color for broken insets **comment** Label color for comments commentbg Background color of comments **cursor** Cursor color **deletedtext** Deleted text color **deletedtextmodifier** Deleted text modifying color (for adjusting the brightness) **depthbar** Color for the depth bars in the margin eolmarker End of line marker color error Color of the LATEX error box footlabel Label color for footnotes foreground Foreground color graphicsbg Graphics inset background color greyedoutbg Background color of greyedout inset greyedoutlabel Label color for greyedout insets greyedouttext Color for greyedout inset text **indexlabel** Label color for index insets

inlinecompletion Inline completion color insetbg Inset marker background color insetframe Inset marker frame color **language** Color for marking foreign language words latex Text color in $\mathbb{L}^{T}E^{X}$ mode listingsbg Background color of listings inset marginlabel Label color for margin notes math Math inset text color mathbg Math inset background color mathcorners Math inset frame color not under focus **mathframe** Math inset frame color under focus mathline Math line color mathmacrobg Macro math inset background color mathmacroblend Macro math blended color mathmacroframe Macro math frame color mathmacrohoverbg Macro math inset background color hovered mathmacrolabel Macro math label color mathmacronewarg Macro template color for new parameters mathmacrooldarg Macro template color for old parameters **newpage** New page color nonunique_inlinecompletion Inline completion color for the non-unique part note Label color for notes notebg Background color of notes pagebreak Page break/line break color paragraphmarker Color used for the pilcrow sign to mark the end of a paragraph phantomtext Text color for phantom insets

preview The color used for previews previewframe Preview frame color regexpframe Color for regexp frame scroll Color that indicates when a row can be scrolled selection Background color of selected text selectionmath Foreground color of selected text in math insets selectiontext Foreground color of selected text shadedbg Background color of shaded box special Special chars text color tabularline Table line color tabularonoffline Table line color textlabel1 Color 1 of layout and custom inset labels textlabel2 Color 2 of layout and custom inset labels textlabel3 Color 3 of layout and custom inset labels urllabel Label color for URL insets urltext Color for URL inset text