Robin Fairbairns & TUGboat editors

### 1 Introduction

This is the documentation for the LATEX  $2_{\varepsilon}$  macros to be used by *TUGboat* authors. The macros represent a development of the earlier **ltugboat** and **ltugproc** styles that were written for use with LATEX 2.09; major contributors have been Robin Fairbairns, Sebastian Rahtz, Michel Goossens, Nico Poppelier and Johannes Braams. Many others have been involved, including Barbara Beeton, Karl Berry, Mimi Burbank, and the LATEX team.

## 2 Availability

The *TUGboat* web pages are at:

https://tug.org/TUGboat

They provide **an article template**, information for authors and reviewers, and the complete run of all published *TUGboat* issues, among other things.

The macros are released for general use, and are distributed via CTAN (directory macros/latex/ contrib/tugboat) in the usual LATEX way as files tugboat.dtx and tugboat.ins. When the .ins file is processed by LATEX, the files ltugboat.cls and ltugbib.bst (for use with articles) and ltugcomn. sty (a cooking pot of perhaps-useful macros, for documentation, etc.) are produced. (ltugproc.cls is also produced for compatibility, but is no longer used for proceedings or anything else.)

The .dtx file may itself be processed by IATEX to produce a formatted (somewhat 'literate') source listing for those interested in the implementation of the TUGboat macros.

## 3 The general structure of a paper

The basic idea is to start your LATEX document with \documentclass{ltugboat}, which defines the appearance of *TUGboat* articles. This uses the file ltugboat.cls as usual.

Each paper, therefore, is written as a document that may stand on its own. It starts with a \documentclass command, and its body is enclosed in a document environment. There are some options to the document class, described in the next section, but ordinarily the author needn't bother with them. The defaults are designed for creating proof copies of papers.

The proof output differs from the final production output with respect to page numbers and other material. The changes required for final production are the responsibility of the TUGboat editors, and the author need not be concerned with them.

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901

## 4 Class options: The ltugboat class

The **ltugboat** class accepts many of the options of the **article** class (it suppresses the font-size selection and one/two-side options).

- draft Set up for a draft copy of a paper (this is the default setting the author need not explicitly set it): page numbering starts at a high number, black marks for overfull boxes.
- extralabel Use the extra label-distinguishing mark in the body of the reference; see section 13.
- final Set up for the final copy of a paper: page numbering to come from elsewhere, no cropmarks.
- harvardcite Specify Harvard-style citation (not recommended in general; see section 13.
- noextralabel Don't use the extra label-distinguishing mark in the body of the reference; see section 13.
- nonumber Sections are not numbered; section heading layout is to be as in the 'plain' tugboat styles.
- numbersec Sections, subsections and subsubsections
  are to be numbered (this is the default setting —
  the author need not explicitly set it).
- onecolumn Typeset article in one column.
- preprint Set up for a preprint.
- rawcite Explicitly specify the standard LATEX citation method, which is the default; see section 13.
- runningfull Information in both header and footer (default).

runningminimal Information in header only.

runningoff Information in neither header nor footer. Again, normally there is no need to use any document

options. They are listed here for completeness.

## 5 Command syntax

In general, we have sought simply to keep to the spirit of  $\underline{\text{LATEX}}$  in the commands provided by the TUGboat class (ltugboat).

In the few cases that it has proved possible to emulate (what seems to a staid old LATEX programmer, such as the original author here) the gay abandon of the syntax of the 'plain' tugboat styles [6], we have done so. Nevertheless, on the whole, the new ltugboat macros define LATEX commands and environments, or modify the definitions of LATEX 'standard' commands. Section 14 lists equivalences between macros defined by the 'plain' package and those defined by the new package.

## 6 Divisions of the paper

Papers in TUGboat may be subdivided in the normal way of a LATEX article (the classes are defined in terms of LATEX's article class). Thus the author may use \section, \subsection, ..., \paragraph commands (but \part and \subparagraph from article are suppressed, and \chapter, which doesn't even appear in the parent class, receives the same treatment).

Authors may note that the style of ordinary issues of *TUGboat* makes no distinction between the titles of the divisions; the visual style relies on the section numbers to indicate where the divisions lie in the hierarchy. If you use **\paragraph**, consider ending the paragraph label with a period; sometimes it is helpful, sometimes not.

For references to numbered sections, our style is to always use the word 'Section' in the text, e.g., Section~\ref{sec:whatever}

without worrying about whether it is technically a sub(sub)section. It's also ok to use the section sign §, if that suits the material better.

Reference can also be made to the 'title' of divisions of the paper, whether they are numbered or not. The **\nameref** command (which uses the technique developed for the **hyperref** package [3]) permits such references; for example, the present section was introduced by:

# \section{Divisions of the paper} \label{sec:divs-paper}

and the command **\nameref{sec:divs-paper}** produces 'Divisions of the paper'. However, as you can see here, reusing the literal text of section titles often results in awkward results. We recommend numbered references in general.

## 6.1 Abstracts

The **ltugboat** class provides two environments for abstracts, abstract and longabstract. The abstract environment simply typesets its body as an un-numbered section whose title is 'Abstract'. The longabstract environment typesets its body in small text, and separates the abstract from the rest of the paper with a decorative line; this is rarely used.

Please write an abstract, however short.

## 6.2 Appendices

A paper may have appendices, which can be expressed in exactly the same way as they would be in the  $IAT_EX$  article class (confusing as that may be):

\appendix \section{This is appendix A}

\section{This is appendix B}

Which will produce 'section' headings similar to:

## A This is appendix A

TUGboat articles may have a small extension to this format using an appendix environment:

\begin{appendix}

\section{This is the first one}

## \end{appendix}

which will produce 'section' headings similar to:

## Appendix A This is the first one

In both cases, the subsections are numbered as normal (i.e., as 'A.n' in normal TUGboat papers):

## 7 Titles, addresses and so on

The title and author(s) of a paper are quoted using commands that are familiar (in syntax, at least) to most LATEX users; the \title command is exactly that used in the standard LATEX classes. There is also shortTitle(your-short-title) to define the form used in running heads or footers; similarly \shortAuthor.

The \author command is used once for each co-author of the paper, and for each \author there should be a \address command that gives a (postal) correspondence address. In addition (wherever possible), *TUGboat* likes to quote an email address for authors: for this, the \netaddress command is used. Each author may also mention a web page, using a \personalURL command, and an ORCID (from orcid.org), using \ORCID.

For example, the present paper has (approximately) this at its start:

```
\title{The \LaTeXe\ \TUB{} Macros}
\author{TUGboat editors}
\address{\TeX\ Users Group}
\netaddress{tugboat@tug.org}
\personalURL{https://tug.org/TUGboat}
\maketitle
```

Lines in the title information can get quite long. If the information being given is to be typeset as ordinary text (as in the case of the **\address** line above). it can be 'wrapped' perfectly happily, as in normal text. If one of the verbatim items (\netaddress or \personalURL commands) is going to be too wide for the column, what is the author to do? (Abbreviating the text, as in the \personalURL above, is not usually an acceptable option!) Unfortunately, the % sign is an entirely acceptable element of both email addresses and URLs, so that the normal 'fall-back' isn't available. Therefore, the classes typeset these electronic addresses in an environment where some of the characters (notably  $\cdot$ .' and  $\prime/$ ') are treated as word-divisions for the purposes of laying out the line.

If the paper is the result of more than one author's labours, a sequence of \author, \address, \netaddress and \personalURL commands may be given, as in the following, which comes from a paper given at TUG'95 (abbreviated):

```
\author{Michel Goossens}
\address{CN Division, CERN\\
...}
\netaddress{...}
\author{Sebastian Rahtz}
\address{Elsevier Science Ltd\\
...}
\netaddress{...}
...
```

The class files will take care of arranging author names and addresses between the \maketitle and (possibly) \makesignature commands.

#### 7.1 Compilation articles

Compilation articles are written as a set of contributed parts under the general editorship of the author(s) of the article. The author of the article is presented (using \author, etc.) in the usual way, and writes the introductory text. Each contributors' part then follows. The contributor's name is quoted in the \contributor command, which is an analogue of the \author command; contributors' \address, \netaddress or \personalURL. The \contributor command opens a group in which the contributor appears, and the contributor's signature (produced with a \makesignature command) closes the group. The general scheme looks like:

```
\title{Example compilation article}
\author{Robin Fairbairns}
\address{University of Cambridge ...}
\netaddress{...}
... introductory text ...
\makesignature
```

\contributor{Betsy the Dog}
\address{Romsey Town, Cambridge}
... Betsy's contribution ...
...
\makesignature ...

#### 8 Verbatim text

For inline verbatim text, authors should ordinarily employ the facilities of LATEX itself, that is, the **\verb** macro. This macro, of course, is highly restricted as to its usage — primarily, it may not appear in the argument of *any* other macro, even **\footnote**.

For displayed verbatim text, the classes add a small increment to the functionality of LATEX's verbatim environment, by introducing an optional argument. The optional argument may contain commands to be executed before starting the verbatim text; the set of commands which have useful effect is strictly limited, but the following are common:

- Font size selection commands: for example, all the display verbatim in the present paper starts with \begin{verbatim}[\small].
- The command \ruled, which is available only in verbatim's optional argument, and specifies that a column-wide rule should be drawn before and after the verbatim text. (This is not the recommended style in general, but it's available for when it helps.)
- The command \makevmeta, also available only in verbatim's optional argument, and makes the construct !<...> inside verbatim execute \meta{...}. For example,

\begin{verbatim}[\small\makevmeta]
The !<duration> is long ...

produces:

The  $\langle duration \rangle$  is long ...

The ! character is made a general escape character by \makevmeta, but <> are not made grouping characters.

• More generally, one of the \make\* commands,<sup>1</sup> which change the category code of characters within the verbatim text. This is (of course) a facility that should only be used with the utmost caution.

Two caveats about these optional arguments:

- The search for the optional argument can be confused by the appearance of a [ character as the first character of the displayed verbatim. An author who wishes to start verbatim text with a [ character should provide an empty optional argument (i.e., '[]') to the verbatim environment.
- The *TUGboat* facility is lost when any package is loaded that also defines the verbatim environment, as discussed next.

Authors may wish to use a more featureful verbatim package, such as such as verbatim [4], listings [2], or fancyvrb [7]. This is ok; it just means the *TUGboat* optional-argument feature is not available.

If you use the listings package, please specify:

Explanations:

 $<sup>^1</sup>$  \makeescape, \makebgroup, ..., \makecomment; used, for example, as \makeescape \|.

- columns=fullflexible: The other values for the columns option don't work well in *TUGboat*; we want the program text to be typeset normally, not forcibly aligned into large character cells.
- keepspaces=true: However, having flexible columns makes spaces in the input not necessarily correspond to spaces in the output. That's usually desired, for alignment of the sources, hence keepspaces.
- commentstyle=\slshape: We prefer slanted to Computer Modern typewriter italic. Using regular upright typewriter for comments is fine too.
- basicstyle=...: We usually prefer \small for displayed verbatim; when using listings, it is necessary to reset inline verbatim to the normal text size.

#### 9 Floating inserts

The classes do not make any change to IATEX's builtin provision for floating inserts, so that authors may generate figures and tables just as they would in any 'normal' IATEX document. Figure and table captions, and labels referring to them, are also substantially untouched.

However, since both classes typeset in two columns, authors must distinguish between the figure and table environments (which produce floats that are the same width as the column) and the figure\* and table\* (which produce floats that are the same width as the page).

#### 10 Special-purpose typesetting

The classes define a rather large set of commands for special-purpose typesetting. Some of them are available for historical reasons only, and many are only useful in somewhat restricted circumstances. For this reason, the present paper only outlines a representative, small set of the macros.

#### 10.1 Acronyms and logos

The classes provide macros that produce 'correct' representations of a large number of acronyms and logos; a small representative selection is shown in figure 1. The sample documents at tug.org/TUGboat/location.html have a more complete list, and of course the class sources are the ultimate reference.

Authors are especially urged to note the \acro command, which is defined in the classes. The visual appearance of all-caps sequences among normal text is rather unpleasing in Computer Modern, unfortunately. Therefore, the \acro command typesets its argument one point size smaller than the surrounding text: compare 'DANTE' (\acro{DANTE}) with

Macro	Output
\ConTeXt	ConTEXt
\Cplusplus	$C^{++}$
\CTAN	CTAN
∖eTex	$\varepsilon$ -TEX
\FAQ	FAQ
\HTML	HTML
\ISBN	ISBN
\KOMAScript	KOMA-Script
∖LaTeXe	$\operatorname{IAT}_{E} X 2_{\varepsilon}$
\MacOSX	Mac OS X
\MathML	MathML
∖MF	METAFONT
∖OMEGA	Ω
∖PDF	PDF
\SGML	SGML
\TUB	TUGboat
\TUG	T <sub>E</sub> X Users Group
\tug	TUG
\XML	XML

Figure 1: A few of the provided acronyms and logos

'DANTE'. Many of the provided macros merely generate calls to \acro; two examples, \CTAN and \tug of the list in figure 1 have already been used in the present paper.

#### 10.2 Assorted other markup

A small list of special typesetting commands follows: a large set of such commands is defined in the classes, but the list covers most of the 'everyday' ones.

- **\Dash** Typeset an em-dash, ignoring preceding and following space, surrounded by thin spaces, only breakable *after* the dash; this is the preferred method of specifying a dash in running text.
- \cs{cmd} Typeset a control sequence name: \cs{fred} produces \fred.
- \env{environ} Typeset the command to begin
   an environment: \env{fred} produces
   \begin{fred}.
- \meta{var} Typeset meta-syntactic text:
   \meta{fred} produces (fred).
- \tubbraced{text} Typeset typewriter text
  in typewriter braces: \tubbraced{fred}
  produces {fred}.
- \nth{n} Typeset an ordinal number; \nth{1} is
   set as 1<sup>st</sup>, \nth{27} is set as 27<sup>th</sup>, and so on.

For commands to typeset urls, see section 12.

#### 11 Use of packages

Being a T<sub>E</sub>X journal, authors may use both standard and non-standard external packages for their articles. The overriding criterion is that articles need to be processable on the *TUGboat* production computers (running current T<sub>E</sub>X Live). A sensible mechanism for submitting personal packages is by use of the filecontents environment. It's also fine to submit manuscript source with additional packages in a zip or other archive.

In general, packages currently on CTAN, and known to work with *current* IATEX are likely to be fine. In particular, the team is happy to accept papers using packages that are supported by members of the IATEX team,<sup>2</sup> subject to the warning already mentioned (section 8): that use of the standard verbatim package eliminates the special verbatim facilities provided by the *TUGboat* classes.

TUG has a policy that macro packages described in *TUGboat* should be available for readers to use. Since typing macros from printed sources is a tedious undertaking, authors of publicly available packages are urged to submit their macros to CTAN. If a package is only available under restricted terms, authors are requested to make this fact clear when first submitting an article to the editor.

The ltugboat class loads the package mflogo. sty [5] for typesetting the METAFONT logo. (If this package is not present by some mischance, ltugboat will emulate its important feature.)

An additional canonically-recommended package is url.sty [1], for typesetting filenames, email addresses, urls, etc.; it is being used throughout the present paper (not least in the bibliography), either on its own or via hyperref.

Although not necessarily recommended in all cases, many additional packages are commonly used. To mention a few:

- **microtype** can help reduce overfull boxes and improve appearance;
- **Imodern** use the Latin Modern fonts, sometimes preferable;
- **hyperref** supports live and internal hyperlinks, outlines, and many other features.

#### 12 Typesetting urls

As mentioned above, please load either url or (preferably) hyperref so that reasonable line breaking of urls can happen.

Furthermore, for the printed (visible) *TUGboat* page, nowadays we typically omit a leading http://

or https://. But for the link to actually work in the output PDF or HTML, the protocol is required (or it appears to be a local filesystem path). Therefore the ltugboat class provides (as of version 2.23, released March 2020) commands \tbsurl for https and \tbhurl for http.<sup>3</sup>

For example, \tbsurl{tug.org} typesets the text 'tug.org' (with the usual url line breaks) as a link to https://tug.org.

Similarly, \tbhurl{mirror.ctan.org} typesets the text 'mirror.ctan.org' as a link to http:// mirror.ctan.org.

\tbsurl and \tbhurl only add the protocol and make live links if hyperref is loaded. Without hyperref, they are merely synonyms for \url. This is ok, and we still request that the protocol not be included; if live links are not being produced in the output, the printed url without the protocol suffices. (When a user copies/pastes url text into a browser, it will normally work.)

For ftp, rsync, and other protocols, it is best to include them explicitly and use \url:

\url{ftp://tug.org},

\url{rsync://tug.org}, etc.

#### 12.1 Url shortcuts

Another aspect of urls: the TUG web server supports a shortcut url mechanism,  $tug.org/1/\langle ident \rangle$ , where  $\langle ident \rangle$  can be any tag, similar to tinyurl.com and similar sites. The idea is that tug.org shortcuts can be used in *TUGboat* articles needing to link to excessively long and/or unstable web resources; then we update the shortcut if needed, and not worry that a commercial shortcut provider will disappear.

The only way to create a tug.org/l/ shortcut is by request, which we are happy to receive.

#### 13 Bibliography

In short: our basic recommendation for handling bibliographies is to use BIBTEX and the tugboat bibliography style. No document options are needed or recommended. All that is required in the article source (as in the template available from tug.org/ TUGboat) is the following:

## \bibliographystyle{tugboat} \bibliography{yourbibfile}

If you don't have tugboat.bst, which was released in 2018, it's fine to use plain or abbrv. If you do have it, though, you may enjoy the following small but useful features:

<sup>&</sup>lt;sup>2</sup> Those in the LATEX base distribution, or one of those in the macros/latex/required sub-tree on CTAN.

<sup>&</sup>lt;sup>3</sup> They are simple two-line wrapper around \hyper@linkurl, and are due to Ulrike Fischer. https://github.com/latex3/hyperref/issues/125

- It is based on abbrvurl.bst (see ctan.org/pkg/urlbst),
- and thus supports url and doi fields, among others. Please use url instead of putting urls in the note field, where possible. Also, please don't bother to include "access date" information for *TUGboat*; we find that extraneous.
- The url field is ignored if either the howpublished or doi field is present. In practice we observe that people put the same information in all those fields, and we don't want to typeset redundant information.
- Does even more abbreviating than abbrv, such as printing only two author names (plus "et al.") if there are more than four authors (thanks to Mico Loretan and Oren Patashnik).
- New field bookauthor for the **@incollection** and **@inproceedings** allows for citing a part, written by author X, of a publication written by author Y, and not just edited by Y.
- Defines an **Conline** entry type as an alias for **Cmisc**.
- For completeness only: tugboat.bst provides editor-intended fields newpage to force a page break after the current item, urlnewline to force a line break before the url value, and journaltie to output a tie instead of space after the journal value. As editors, we've found that these presentation tweaks can be desirable for the final typeset output. Authors need not worry about them.

If you use BIBTEX, feel free to take advantage of the accumulated bibliography of *TUGboat* itself (info/tugboat.bib on CTAN), and the other compilations by Nelson Beebe in that same directory.

By the way, we recommending using commas to terminate all fields in .bib files, including the last one in an entry. That makes it one less thing to worry about when changing fields around in the source.

Bibliographies can be difficult to typeset at the best of times. IATEX sets \sloppy when typesetting the bibliography, but this typically leads to unpleasant output with *TUGboat*'s narrow columns. The author can specify typesetting parameters using the command \SetBibJustification. The classes remain \sloppy by default, but the author may (for example) say:

#### \SetBibJustification{\raggedright}

as the present article does, to often achieve somewhat better results.

A last note for references: for *TUGboat* issues, please use the format *volno:issno*, e.g., "*TUGboat* 32:1" for volume 32, number 1.

# 13.1 Non-recommended bibliography facilities

The preceding gives the bibliography recommendations for current *TUGboat* articles. If, for whatever reason, you do not wish to follow those recommendations, this section is about some of the myriad historical and other possibilities.

Notwithstanding that general recommendation for the tugboat (falling back to plain) BIBT<sub>E</sub>X style, *TUGboat*'s Harvard-style citation support may be selected by specifying harvardcite as an option of the \documentclass command.<sup>4</sup> If your article demands Harvard-style citations, you may prefer to load natbib or similar instead of using *TUGboat*'s facilities; that's fine.

This basic citation format is 'author(s), year', but the macros are capable of many variations. This in turn places somewhat of a load on the author to use the correct citation macro. The macros available are shown in figure 2; the figure assumes an entry in the bibliography with authors Tom, Dick, and Harry, and with a 1990 date.

Macro	Output
\cite{key}	(Tom, Dick, and Harry, 1990)
\citeA{key}	(Tom, Dick, and Harry)
\citeNP{key}	Tom, Dick, and Harry, 1990
$\citeANP{key}$	Tom, Dick, and Harry
\citeN{key}	Tom, Dick, and Harry (1990)
\shortcite{key}	(Tom et al., 1990)
	[also has A and NP variants]
\citeyear{key}	(1990)
	[also has an NP variant]

Figure 2: The range of citations in harvard style

Note that, if Tom, Dick, and Harry are a prolific team, there can easily be more than one reference to their work in one year. In such a case, the citations will be (Tom, Dick, and Harry, 1990a), (Tom, Dick, and Harry, 1990b), and so on. These extra 'a', 'b', etc., tags may also appear in the references section of the paper, attached to the year recorded for the reference: whether this indeed happens is controlled by the extralabel and noextralabel class options. The

<sup>&</sup>lt;sup>4</sup> The macros used derive rather directly from the 'harvard' styles written by Glenn Paulley and later maintained by Peter Williams; the BIBTEX style derives from one developed by Patrick Daly.

default state (option  $\mathsf{extralabel})$  attaches the extra characters.

As for BIBLATEX: we don't recommend it for TUGboat. If you feel you must use it, that is ok, but we may still change it to using the default LATEX and BIBTEX facilities in processing for publication if the output from BIBLATEX is problematic, as we have often seen it to be.

#### 14 Equivalences between the 'plain' and IATEX TUGboat packages

A good proportion of the commands in the 'plain' packages also appear (with the same meaning) in the LATEX classes. Figure 3 gives a brief summary of where the macros differ significantly.

Plain macro	LATEX macro
\head	\section
\subhead	\subsection
\subsubhead	\subsubsection
\list	itemize, enumerate, $etc.$ ,
	environments
\verbatim	verbatim or \verb
\figure	figure or figure* environments

**Figure 3**: Equivalences between plain and LATEX *TUGboat* macros

LATEX itself makes comprehensive provision for lists; the *TUGboat* classes make no attempt to emulate the list facilities of the 'plain' macros.

The 'plain' styles' provision for verbatim text is also somewhat different from the LATEX approach; the *TUGboat* classes offer a small subset of the extra facilities that the 'plain' styles provide; for more elaborate facilities, the user is referred to the verbatim, listings, and fancyvrb packages (see section 8).

Of course, the syntax of commands given to the IATEX classes is different (as discussed in section 5); arguments are (almost always) enclosed in braces instead of the various forms provided by the 'plain' macros.

#### References

- [1] D. Arseneau. The url package. ctan.org/pkg/url
- [2] C. Heinz, et al. The listings package. ctan.org/pkg/listings
- [3] S. Rahtz, H. Oberdiek, et al. The hyperref package. ctan.org/pkg/hyperref
- [4] R. Schöpf. The verbatim package. ctan.org/pkg/verbatim
- [5] U. Vieth. The mflogo package. ctan.org/pkg/mflogo
- [6] R. Whitney, B. Beeton. TUGboat authors' guide. TUGboat 10(3):378-385, November 1989. ctan.org/pkg/tugboat-plain
- [7] T.V. Zandt, et al. The fancyvrb package. ctan.org/pkg/fancyvrb
  - Robin Fairbairns & TUGboat editors tugboat@tug.org tug.org/TUGboat