

# SNOTEZ

VO.6 2022/02/10

sidenote support for L<sup>A</sup>T<sub>E</sub>X 2<sub>ε</sub>

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## 1 License and Requirements

Permission is granted to copy, distribute and/or modify this software under the terms of the L<sup>A</sup>T<sub>E</sub>X Project Public License (LPPL), version 1.3c or later (<http://www.latex-project.org/lppl.txt>). The software has the status “maintained.”

## 2 Motivation

This has just been an exercise on a lazy afternoon.<sup>1</sup> Well, in the beginning at least. Since there already is Andy THOMAS’ sidenotes package<sup>2</sup> there is probably no real need for **SNOTEZ**. Moreover, the tufte classes<sup>3</sup> as well as memoir<sup>4</sup> also provide corresponding mechanisms. Besides the fun I had my motivation was also based on the fact that I didn’t like some things done by the sidenotes package such as inserting kerns and superscripted commas for multiple marks. I prefer to let my fnpct<sup>5</sup> package handle these things. Anyways, here it is and it seems to be working as intended so I don’t see a reason why it shouldn’t be available for use.

By the way: the fnpct package vo.2k and later knows about **SNOTEZ** and automatically adapts the note commands!

1. <https://www.youtube.com/watch?v=0U6EyXcFBxA>

2. THOMAS and SCHEBAUM [TS20]

3. GODBY, KLEB, and WOOD [GKW10]

4. WILSON and MADSEN [WM21]

5. NIEDERBERGER [Nie22]

## 3 Introduction

The `SNOTEZ` package introduces a `\sidenote` command<sup>1</sup> that typesets sidenotes the same way `\footnote` typesets footnotes. It provides some options that allow formatting the appearance of the sidenotes.<sup>2</sup> As a default sidenotes are typeset in a `\marginpar` but there are possibilities using Markus Kohm's `marginnote` [Koh18] package as well.

As with footnotes it is possible to set mark and text separately using the equivalent commands `\sidenotemark` and `\sidenotetext`, respectively. Instead of lots of code examples this documentation will use the `\sidenote` macro itself extensively. It is assumed you know how to use `\footnote` and are able to transfer your knowledge.

## 4 Usage

The basic usage is the very same as with L<sup>A</sup>T<sub>E</sub>X's `\footnote`, `\footnotemark` and `\footnotetext`. Unsurprisingly the presented commands are these:

```
\sidenote[⟨mark⟩]{⟨text⟩}
```

The basic command. The syntax is the very same as for `\footnote`.

```
\sidenote(⟨offset⟩)[⟨mark⟩]{⟨text⟩}
```

Actually I lied: `\sidenote` has a second option that smuggles itself before the `⟨mark⟩` option if you use it: an argument for a vertical offset that takes a length. An empty second option assumes you want the automatic mark. If you use this argument the note is set with the `\marginnote` command.<sup>3</sup> Please see its documentation<sup>4</sup> [Koh18] for the `⟨offset⟩` argument. `SNOTEZ` only passes the value on.

Actually, this is only part of the truth: while typing this documentation I repeatedly found myself shifting notes by multiples of `\baselineskip` so the argument accepts a shortcut for this. A star `*` followed by a (positive or negative) number denotes a multiple of `\baselineskip`. By the way: a positive value shifts the note *down*.

When you're using the `dblarg = {true}` option the `⟨offset⟩` argument has square brackets instead of parentheses!

```
\sidenotemark[⟨marg⟩]
```

This command has the same purpose as `\footnotemark` but for sidenotes.

```
\sidenotetext[⟨mark⟩]{⟨text⟩}
```

The same as `\footnotetext` but for sidenotes. Beware where you place it: it calls `\marginpar` or `\marginnote` and thus determines where the actual note is placed.

<sup>1</sup> This is an example demonstrating the default appearance.

<sup>2</sup> In all sidenotes in this document the mark is typeset on the baseline and the text is set ragged right.

<sup>3</sup> From the `marginnote` package

<sup>4</sup> For example with `texdoc marginnote` on your command line.

`\sidenotetext`( $\langle offset \rangle$ )[ $\langle mark \rangle$ ]{ $\langle text \rangle$ }

I lied again: `\sidenotetext` also has the second optional argument  $\langle offset \rangle$  that again smuggles itself before the  $\langle mark \rangle$  option if you use it. For details see the second description of the `\sidenote` command.

Here is one short example of the usage.

```

1 % produces a sidenote with automatic number in a
2 % \marginpar:
3 \sidenote{A note}
4
5 % produces a sidenote with mark `a' in a
6 % \marginpar:
7 \sidenote[a]{A note}
8
9 % produces a sidenote with automatic number in a
10 % \marginnote:
11 \sidenote(){A note}
12 % alternative syntax (dblarg=true):
13 \sidenote[][]{A note}
14
15 % produces a sidenote with automatic number in a
16 % \marginnote shifted down by \baselineskip:
17 \sidenote(*){A note}
18 % alternative syntax (dblarg=true):
19 \sidenote[*][]{A note}
20
21 % produces a sidenote with automatic number in a
22 % \marginnote shifted up by 2ex:
23 \sidenote(-2ex){A note}
24 % alternative syntax (dblarg=true):
25 \sidenote[-2ex][]{A note}
26
27 % produces a sidenote with mark `a' in a
28 % \marginnote shifted down by 2\baselineskip:
29 \sidenote(*2)[a]{A note}
30 % alternative syntax (dblarg=true):
31 \sidenote[*2][a]{A note}

```

## 5 Figures in the Margin

In the case of small figures or tables one might want to place them in the margin, too. Especially in a document with a larger margin than it is in the standard classes.

For these cases `SNOTEZ` provides<sup>1</sup> these environments:

1. Introduced in version 0.5

`\begin{sidefigure}`

Places a figure in the margin within a `\marginpar`. `\caption` can be used in the usual way.

`\begin{sidetable}`

Places a table in the margin within a `\marginpar`. `\caption` can be used in the usual way.

In order to be able to place other floats in the margin, too, `SNOTEZ` provides the following command:

`\newsnotefloat[⟨code⟩]{⟨name⟩}`

This defines a new environment `side⟨name⟩`. `⟨code⟩` would be placed after the formatting from `sidefloat-format` but before the environment's contents.

Both existing environments have been defined with this command.

```
1 \newsnotefloat{figure}
2 \newsnotefloat{table}
```

## 6 Options

Although all options can be used as package option you can also set all options (locally) with a setup command:

`\setsidenotes{⟨options⟩}`

Set options as a comma-separated list of key/value pairs.

Available options are these:

`dblarg = true|false` Default: false

Prior to version 0.3 `SNOTEZ`' `\sidenote` and `\sidenotetext` had both their optional arguments with square brackets where the use of one argument referred to the mark but when both were used the first argument referred to the offset and the second to the mark. This syntax is kept with this option. Setting it to true changes the `(⟨offset⟩)` argument syntax into `[⟨offset⟩]`.

`marginnote = true|false` Default: false

Use marginnote's `\marginnote` [Koh18] for all `\sidenotes`. In the default setting `\sidenote` uses `\marginpars` to set the sidenote unless you use the `⟨offset⟩` argument. If you use this option *all* sidenotes are set with `\marginnote`. *This option can only be used in the preamble.*

`text-format = {⟨code⟩}` Default: `\normalfont\footnotesize`

The format of the sidenote text.

## 6 Options

- `text-format+` =  $\{\langle code \rangle\}$  (initially empty)  
Code to be appended to the format set with `text-format`.<sup>1</sup>
- `perpage` = `true`|`false` Default: `false`  
*This option can only be set in the preamble.* Make sidenotes counter per page. It uses package `zref-perpage`'s [Obe20] for the task. This documentation is an example for the use of the option.
- `perchapter` = `true`|`false` Default: `false`  
*This option can only be set in the preamble.*<sup>2</sup> If your document class has defined a counter chapter and if you set this to `true` the sidenote counter will be added to the reset list of the chapter counter.
- `note-mark-sep` =  $\{\langle code \rangle\}$  Default: `\space`  
The separator between sidenote mark and sidenote text in the sidenote.
- `note-mark-format` =  $\{\langle code \rangle\}$  Default: `\@textsuperscript{\normalfont#1}`  
The format of the sidenote mark in the sidenote. Please refer to the actual mark with #1.
- `text-mark-format` =  $\{\langle code \rangle\}$  Default: `\@textsuperscript{\normalfont#1}`  
The format of the sidenote mark in the text.<sup>3</sup> Please refer to the actual mark with #1.
- `footnote` = `true`|`false` Default: `false`  
*This option can only be used in the preamble.* Let<sup>4</sup> `\footnote` to be `\sidenote`, `\footnotemark` to be `\sidenotemark` and `\footnotetext` to be `\sidenotetext`.
- `sidefloat-format` =  $\{\langle code \rangle\}$  Default: `\raggedright`  
The format of the contents of a sidefloat environment text.<sup>5</sup>
- `sidefloat-format+` =  $\{\langle code \rangle\}$   
Code to be appended to the format set with `sidefloat-format`.<sup>6</sup>

1. This document, for example, appends `raggedze`'s `\RaggedRight` [Sch21] to the sidenote's format.

2. Introduced in version 0.6

3. This document uses Bob TENNENT's libertine package [Ten18] and redefines the mark formats to use its `\textsu` command.

4. In the sense of `\let`

5. Introduced in version 0.5

6. Introduced in version 0.5

As a short example this is how the sidenotes for this document are formatted:

```

1 \setsidenotes{
2   note-mark-format=#1.,
3   text-mark-format=\textsu{\hspace*{.04em}#1},
4   text-format+=\RaggedRight,
5   perpage=true
6 }

```

## 7 Implementation

In the following code the lines 1–24 have been omitted. They only repeat the license statement which has already been mentioned in section 1.

```

25 \def\snotez@date{2022/02/10}
26 \def\snotez@version{v0.6}
27 \def\snotez@description{sidenote support for LaTeX 2e (CN)}
28
29 \NeedsTeXFormat{LaTeX2e}
30 \ProvidesPackage{snotez}[\snotez@date\space\snotez@version\space\snotez@description]
31
32 \RequirePackage{etoolbox,pgfopts,marginnote}
33
34 % -----
35 % package options:
36 \newbool{snotez@marginnote}
37 \newbool{snotez@perpage}
38 \newbool{snotez@footnote}
39 \newbool{snotez@dblarg}
40 \newbool{snotez@perchapter}
41
42 \newcommand*\snotez@note@mark@sep{\space}
43 \newcommand*\snotez@note@mark@format[1]{\@textsuperscript{\normalfont#1}}
44 \newcommand*\snotez@format{\normalfont\footnotesize}
45 \newcommand*\snotez@text@mark@format[1]{\@textsuperscript{\normalfont#1}}
46
47 \pgfkeys{
48   snotez/.cd,
49   % all sidenotes use \marginnote:
50   marginnote/.is if = snotez@marginnote ,
51   % formatting of the note text:
52   text-format/.code = \renewcommand*\snotez@format{#1} ,
53   text-format+/.code =
54     \expandafter\renewcommand
55     \expandafter*%
56     \expandafter\snotez@format
57     \expandafter{\snotez@format#1} ,

```

## 7 Implementation

```

58 % make sidenotes counted per page:
59 perpage/.is if      = snotez@perpage ,
60 % count sidenotes per chapter:
61 perchapter/.is if   = snotez@perchapter ,
62 % formatting of the note mark:
63 note-mark-sep/.code = \renewcommand*\snotez@note@mark@sep{#1} ,
64 note-mark-format/.code = \renewcommand*\snotez@note@mark@format[1]{#1} ,
65 text-mark-format/.code = \renewcommand*\snotez@text@mark@format[1]{#1} ,
66 % make all footnotes sidenotes:
67 footnote/.is if     = snotez@footnote ,
68 % change optional argument input:
69 dblarg/.is if       = snotez@dblarg ,
70 % formatting of the sidefloats' contents:
71 sidefloat-format/.code = \renewcommand*\snotez@sidefloat@format{#1} ,
72 sidefloat-format+/.code =
73   \expandafter\renewcommand
74   \expandafter*%
75   \expandafter\snotez@sidefloat@format
76   \expandafter{\snotez@sidefloat@format#1}
77 }
78
79 \ProcessPgfoptions*
80
81 \newrobustcmd\setsidenotes[1]{\pgfqkeys{/snotez}{#1}}
82
83 % -----
84 % the \sidenote command
85 \AtBeginDocument{%
86   \ifbool{snotez@dblarg}{
87     {\newrobustcmd*\sidenote{\snotez@sidenote@dblarg}}
88     {\newrobustcmd*\sidenote{\snotez@sidenote@nodblarg}}}%
89 }
90
91 % syntax:
92 % - \sidenote{text}
93 % - \sidenote[mark]{text}
94 % - \sidenote[offset][mark]{text}
95 \newrobustcmd*\snotez@sidenote@dblarg{%
96   \@ifnextchar[%
97     {\snotez@sidenote@dblarg@aux}
98     {\snotez@sidenote@aux{}}}% no option
99 }
100
101 \protected\def\snotez@sidenote@dblarg@aux[#1]{%
102   \@ifnextchar[%
103     {\snotez@sidenote@aux{#1}}}% two options
104     {\snotez@sidenote@aux{}}{#1}}}% one option
105 }
106
107 % syntax:
108 % - \sidenote{text}
109 % - \sidenote[mark]{text}
110 % - \sidenote[offset]{text}
111 % - \sidenote[offset][mark]{text}

```

## 7 Implementation

```

112 \newrobustcmd*\snotez@sidenote@nodblarg{%
113   \@ifnextchar(%
114     {\snotez@sidenote@nodblarg@aux}% offset
115     {%
116       \@ifnextchar[
117         {\snotez@sidenote@aux{}}% no offset but mark
118         {\snotez@sidenote@aux{[]}}% no offset and no mark
119       }%
120     }
121
122 \protected\def\snotez@sidenote@nodblarg@aux(#1){%
123   \@ifnextchar[%
124     {\snotez@sidenote@aux{#1}}% mark
125     {\snotez@sidenote@aux{#1}[]}% no mark
126   }
127
128 % #1: offset
129 % #2: mark
130 % #3: text
131 \long\def\snotez@sidenote@aux#1[#2]#3{%
132   \snotez@mark{#2}%
133   \snotez@text{#1}{#3}%
134 }
135
136 % this one is very much \@footnotemark from latex.ltx:
137 \newrobustcmd*\snotez@write@mark[1]{%
138   \leavevmode
139   \ifhmode\edef\@x@sf{\the\spacefactor}\nobreak\fi
140   #1%
141   \ifhmode\spacefactor\@x@sf\fi
142   \relax
143 }
144
145 \newrobustcmd*\snotez@mark[1]{%
146   \ifblank{#1}% or \ifstrempy?
147   {%
148     \refstepcounter{sidenote}%
149     \protected@xdef\@the@snotez@mark{\thesidenote}%
150   }
151   {%
152     \protected@edef\@currentlabel{#1}%
153     \protected@xdef\@the@snotez@mark{#1}%
154   }%
155   \snotez@write@mark{%
156     \hbox{\snotez@text@mark@format{\@the@snotez@mark}}}%
157 }
158
159 \newcounter{sidenote}
160 \AtBeginDocument{%
161   \ifltxcounter{chapter}{%
162     \ifbool{snotez@perchapter}{\counterwithin{sidenote}{chapter}}{%
163       }{}
164     }
165 }

```



## 7 Implementation

```

166 % -----
167 % the \sidenotemark command
168 \newrobustcmd*\sidenotemark[1][\snotez@mark{#1}]
169
170 % -----
171 % the \sidenotetext command
172 \AtBeginDocument{
173   \ifbool{snotez@dblarg}{
174     {\newrobustcmd*\sidenotetext{\snotez@sidenotetext@dblarg}}
175     {\newrobustcmd*\sidenotetext{\snotez@sidenotetext@nodblarg}}
176   }
177
178 % syntax:
179 % - \sidenotetext{text}
180 % - \sidenotetext[mark]{text}
181 % - \sidenotetext[offset][mark]{text}
182 \newrobustcmd*\snotez@sidenotetext@dblarg{%
183   \@ifnextchar[%
184     {\snotez@sidenotetext@dblarg@aux}
185     {\snotez@sidenotetext@aux{}}{}% no option
186   }
187
188 \protected\def\snotez@sidenotetext@dblarg@aux[#1]{%
189   \@ifnextchar[%
190     {\snotez@sidenotetext@aux{#1}}% two options
191     {\snotez@sidenotetext@aux{{#1}}}% one option
192   }
193
194 % syntax:
195 % - \sidenotetext{text}
196 % - \sidenotetext[mark]{text}
197 % - \sidenotetext(offset){text}
198 % - \sidenotetext(offset)[mark]{text}
199 \newrobustcmd*\snotez@sidenotetext@nodblarg{%
200   \@ifnextchar(%
201     {\snotez@sidenotetext@nodblarg@aux}% offset
202     {%
203       \@ifnextchar[
204         {\snotez@sidenotetext@aux{}}% no offset nut mark
205         {\snotez@sidenotetext@aux{}}{}% no offset and no mark
206       }%
207     }
208
209 \protected\def\snotez@sidenotetext@nodblarg@aux(#1){%
210   \@ifnextchar[%
211     {\snotez@sidenotetext@aux{#1}}% mark
212     {\snotez@sidenotetext@aux{#1}}{}% no mark
213   }
214
215 % #1: offset
216 % #2: mark
217 % #3: text
218 \long\protected\def\snotez@sidenotetext@aux#1[#2]#3{%
219   \ifblank{#2}{\protected@xdef\the@snotez@mark{#2}}%

```

## 7 Implementation

```

220 \snotez@text{#1}{#3}%
221 }
222
223 % #1: offset
224 % #2: text
225 \newrobustcmd*\snotez@text[2]{%
226   \ifblank{#1}
227   {%
228     \snotez@marginpar{%
229       \snotez@format
230       \snotez@write@mark{\snotez@note@mark@format{\@the@snotez@mark}}%
231       \snotez@note@mark@sep#2}%
232   }
233   {%
234     \snotez@marginnote{%
235       \snotez@format
236       \snotez@write@mark{\snotez@note@mark@format{\@the@snotez@mark}}%
237       \snotez@note@mark@sep#2%
238     }[\snotez@if@nbskip{#1}]%
239   }%
240 }
241
242 \newcommand*\snotez@if@nbskip[1]{%
243   % if #1 starts with * gobble it and add \baselineskip:
244   \expandafter\ifx\@car#1\@nil*%
245     \expandafter\@firstoftwo
246   \else
247     \expandafter\@secondoftwo
248   \fi
249   {\@cdr#1\@nil\baselineskip}%
250   {#1}%
251 }
252
253 \let\snotez@marginpar\marginpar
254 \let\snotez@marginnote\marginnote
255
256 % -----
257 % margin floats with captions, based on an idea in tufte-latex
258 \newsavebox\snotez@sidefloat@box
259 \newcommand*\snotez@sidefloat@format{\raggedright}
260
261 \newenvironment{snotez@sidefloat}[2]{%
262   \def\@captype{#1}%
263   \begin{lrbox}{\snotez@sidefloat@box}%
264     \minipage{\marginparwidth}%
265     \snotez@sidefloat@format#2%
266   }{%
267     \endminipage
268     \end{lrbox}%
269     \marginpar{\unhbox\snotez@sidefloat@box}%
270 }
271
272 \newrobustcmd*\snotez@new@sidefloat[2]{%
273   \newenvironment{side#1}

```

## 7 Implementation

```

274     {\snotez@sidefloat{#1}{#2}}
275     {\endsnotez@sidefloat}%
276 }
277
278 \newrobustcmd*\newsnotezfloat[2][\snotez@new@sidefloat{#2}{#1}]
279
280 \newsnotezfloat{figure}
281 \newsnotezfloat{table}
282
283 % -----
284 % process preamble options:
285 \AtBeginDocument{
286   % if option `footnote=true' let \footnote to \sidenote:
287   \ifbool{snotez@footnote}
288   {
289     \let\footnote\sidenote
290     \let\footnotemark\sidenotemark
291     \let\footnotetext\sidenotetext
292     \ifdef\multfootnote{%
293       \let\multfootnote\multsidenote
294     }{}%
295   }{}
296   % if option `marginnote=true' use \marginnote for all notes:
297   \ifbool{snotez@marginnote}
298   {%
299     \let\snotez@marginpar\marginnote
300     \PackageInfo{snotez}
301       {All sidenotes are now using \string\marginnote^^J
302        instead of \string\marginpar}%
303   }%
304   {}
305 }
306
307 \AddToHook{begindocument/before}{%
308   \ifbool{snotez@perpage}{%
309     \RequirePackage{zref-perpage}%
310     \zmakeperpage{sidenote}%
311     \ifpackageloaded{hyperref}{\def\theHsidenote{\theHsection.\thesidenote}
312     }{}%
313 }
314
315
316 \endinput
317
318 % -----
319 % HISTORY:
320 2012/11/15 v0.1 - first version
321 2013/04/03 v0.2 - documentation, removed erroneous `fnpct' adaption, other
322                   minor changes
323                   - added update of \@currentlabel when a custom mark is used
324 2013/04/21 v0.3 - try to avoid conflict with package loading order of
325                   `perpage' and `zref-abspage'
326                   - allow `*' syntax for offsets that are multiples of

```

## References

327                    `\baselineskip`  
328                    - syntax change in optional arguments; option ``dblarg'`  
329                    provides previous syntax >> this is the default  
330 2013/06/13 v0.3a - better separation of definition of `\sidenote` and  
331                    `\sidenotetext` commands and the internal commands  
332 2013/11/21 v0.4 - robustify commands where appropriate  
333                    - use `cnltx-base`  
334 2020/01/12 v0.5 - remove dependency on ``cnltx-base'`  
335 2020/12/14 v0.5a - fix issue #1  
336 2022/02/10 v0.6 - fix issue #2  
337                    - add option ``perchapter'`

## References

- [GKW10] Kevin GODBY, Bil KLEB, and Bill WOOD.  
tufte-latex. version 3.5.2, 2010 (or newer).  
URL: <https://www.ctan.org/pkg/tufte-latex/>.
- [Koh18] Markus KOHM. marginnote. version 1.4b, Aug. 9, 2018 (or newer).  
URL: <https://www.ctan.org/pkg/marginnote/>.
- [Nie22] Clemens NIEDERBERGER.  
fnpct. version 1.1, Feb. 3, 2022 (or newer).  
URL: <https://www.ctan.org/pkg/fnpct/>.
- [Obe20] Heiko OBERDIEK. zref. version 2.32, July 3, 2020 (or newer).  
URL: <https://www.ctan.org/pkg/zref/>.
- [Sch21] Martin SCHRÖDER.  
ragged2e. version 3.1, Dec. 15, 2021 (or newer).  
URL: <https://www.ctan.org/pkg/ms/ragged2e/>.
- [Ten18] Bob TENNENT. libertine. Oct. 1, 2018 (or newer).  
URL: <https://www.ctan.org/pkg/libertine/>.
- [TS20] Andy THOMAS and Oliver SCHEBAUM, current maintainer:  
Andy THOMAS. sidenotes. version 1.00a, Mar. 24, 2020 (or newer).  
URL: <https://www.ctan.org/pkg/sidenotes/>.
- [WM21] Peter WILSON and Lars MADSEN.  
memoir. version 3.7p, June 16, 2021 (or newer).  
URL: <https://www.ctan.org/pkg/memoir/>.

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