SNOTEZ

v0.7  2022/02/12

sidenote support for \LaTeX\ 2ε

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1 License and Requirements

Permission is granted to copy, distribute and/or modify this software under the terms of the \LaTeX\ 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. Well, in the beginning at least. Since there already is Andy Thomas’ sidenotes package there is probably no real need for SNOTEZ. Moreover, the tufte classes as well as memoir 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 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 v0.2k and later knows about SNOTEZ and automatically adapts the note commands!

1. https://www.youtube.com/watch?v=OU6EyXcFBxA
2. Thomas and Scheraum [TS20]
3. Godby, Kleb, and Wood [GKW10]
4. Wilson and Madsen [WM21]
5. Niederberger [Nie22]
3 Introduction

The \texttt{snotez} package introduces a \texttt{sidenote} command\footnote{This is an example demonstrating the default appearance.} that typesets sidenotes the same way \texttt{footnote} typesets footnotes. It provides some options that allow formatting the appearance of the sidenotes.\footnote{As a default sidenotes are typeset in a \texttt{marginpar} but there are possibilities using Markus Kohm’s \texttt{marginnote} [Koh18] package as well.} As with footnotes it is possible to set mark and text separately using the equivalent commands \texttt{sidenotemark} and \texttt{sidenotetext}, respectively. Instead of lots of code examples this documentation will use the \texttt{sidenote} macro itself extensively. It is assumed you know how to use \texttt{footnote} and are able to transfer your knowledge.

4 Usage

The basic usage is the very same as with \LaTeX’s \texttt{footnote}, \texttt{footnotemark} and \texttt{footnotetext}. Unsurprisingly the presented commands are these:

\begin{verbatim}
\sidenote{⟨mark⟩}{⟨text⟩}
\end{verbatim}

The basic command. The syntax is the very same as for \texttt{footnote}.

\begin{verbatim}
\sidenote(⟨offset⟩){⟨mark⟩}{⟨text⟩}
\end{verbatim}

Actually I lied: \texttt{sidenote} has a second option that smuggles itself before the \texttt{⟨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 \texttt{marginnote} command. Please see its documentation\footnote{Please see its documentation\footnote{3. From the marginnote package} [Koh18] for the \texttt{⟨offset⟩} argument. \texttt{snotez} only passes the value on.} for the \texttt{⟨offset⟩} argument. \texttt{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 \texttt{baselineskip} so the argument accepts a shortcut for this. A star * followed by a (positive or negative) number denotes a multiple of \texttt{baselineskip}. By the way: a positive value shifts the note down.

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

\begin{verbatim}
\sidenotemark{⟨marg⟩}
\end{verbatim}

This command has the same purpose as \texttt{footnotemark} but for sidenotes.

\begin{verbatim}
\sidenotetext{⟨mark⟩}{⟨text⟩}
\end{verbatim}

The same as \texttt{footnotetext} but for sidenotes. Beware where you place it: it calls \texttt{marginpar} or \texttt{marginnote} and thus determines where the actual note is placed.
5 Figures in the Margin

\texttt{\textbackslash sidenotetext}\{⟨\textbackslash offset⟩\}\{⟨\textbackslash mark⟩\}\{⟨\textbackslash text⟩\}

I lied again: \texttt{\textbackslash sidenotetext} also has the second optional argument \texttt{⟨\textbackslash offset⟩} that again smuggles itself before the \texttt{⟨\textbackslash mark⟩} option if you use it. For details see the second description of the \texttt{\textbackslash sidenote} command.

Here is one short example of the usage.

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

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 \texttt{SNOTEZ} provides\textsuperscript{1} these environments:

\textsuperscript{1} Introduced in version 0.5
\begin{sidefigure}
Places a figure in the margin within a \texttt{\textbackslash marginpar}. \texttt{\textbackslash caption} can be used in the usual way.
\end{sidefigure}

\begin{sidetable}
Places a table in the margin within a \texttt{\textbackslash marginpar}. \texttt{\textbackslash caption} can be used in the usual way.

In order to be able to place other floats in the margin, too, \texttt{SNOTEZ} provides the following command:
\begin{verbatim}
\newsnotezfloat\{⟨code⟩\}\{⟨name⟩\}
\end{verbatim}
This defines a new environment \texttt{side⟨name⟩}. \{⟨code⟩\} would be placed after the formatting from \texttt{sidefloat-format} but before the environment’s contents.

Both existing environments have been defined with this command.

1. \texttt{\newsnotezfloat\{figure\}}
2. \texttt{\newsnotezfloat\{table\}}

\section{6 Options}

Although all options can be used as package option you can also set all options (locally) with a setup command:
\begin{verbatim}
\setsidenotes\{⟨options⟩\}
\end{verbatim}
Set options as a comma-separated list of key/value pairs.

Available options are these:
\begin{itemize}
\item \texttt{\textbackslash dblarg = true|false} \hspace{1cm} Default: false
Prior to version 0.3 \texttt{SNOTEZ’ \textbackslash sidenote} and \texttt{\textbackslash 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⟩].
\item \texttt{\textbackslash marginnote = true|false} \hspace{1cm} Default: false
Use \texttt{marginnote’s \textbackslash marginnote [Koh18]} for all \texttt{\textbackslash sidenotes}. In the default setting \texttt{\textbackslash sidenote} uses \texttt{\textbackslash marginpars} to set the sidenote unless you use the ⟨offset⟩ argument. If you use this option all sidenotes are set with \texttt{\textbackslash marginnote}. This option can only be used in the preamble.
\item \texttt{\textbackslash text-format = \{⟨code⟩\}} \hspace{1cm} Default: \texttt{\normalfont\footnotesize}
The format of the sidenote text.
\end{itemize}
6 Options

\text-format+ = {\langle\texttt{code}\rangle} \quad (\text{initially empty})
\begin{itemize}
\item Code to be appended to the format set with \text-format.
\end{itemize}

\texttt{perpage = true|false} \quad \text{Default: false}
\begin{itemize}
\item This option can only be set in the preamble. Make sidenotes counter per page.
\end{itemize}

\begin{itemize}
\item It uses package zref-perpage's \cite{Obe20} for the task. This documentation is an example for the use of the option.
\end{itemize}

\texttt{perchapter = true|false} \quad \text{Default: false}
\begin{itemize}
\item This option can only be set in the preamble.
\end{itemize}

\begin{itemize}
\item 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.
\end{itemize}

\texttt{note-mark-sep = \langle\texttt{code}\rangle} \quad \text{Default: \texttt{space}}
\begin{itemize}
\item The separator between sidenote mark and sidenote text in the sidenote.
\end{itemize}

\texttt{note-mark-format = \langle\texttt{code}\rangle} \quad \text{Default: \texttt{@textsuperscript{\normalfont#1}}}
\begin{itemize}
\item The format of the sidenote mark in the sidenote. Please refer to the actual mark with \#1.
\end{itemize}

\texttt{text-mark-format = \langle\texttt{code}\rangle} \quad \text{Default: \texttt{@textsuperscript{\normalfont#1}}}
\begin{itemize}
\item The format of the sidenote mark in the text. Please refer to the actual mark with \#1.
\end{itemize}

\texttt{footnote = true|false} \quad \text{Default: false}
\begin{itemize}
\item This option can only be used in the preamble. \texttt{footnote} to be \texttt{sidenote}, \texttt{footnotemark} to be \texttt{sidenotemark} and \texttt{footnotetext} to be \texttt{sidenotetext}.
\end{itemize}

\texttt{sidefloat-format = \langle\texttt{code}\rangle} \quad \text{Default: \texttt{\raggedright}}
\begin{itemize}
\item The format of the contents of a sidefloat environment text.
\end{itemize}

\texttt{sidefloat-format+ = \langle\texttt{code}\rangle}
\begin{itemize}
\item Code to be appended to the format set with \texttt{sidefloat-format}.
\end{itemize}

1. This document, for example, appends ragged2e's \texttt{\RaggedRight [Sch21]} to the sidenote's format.

2. Introduced in version 0.6

3. This document uses Bob Tennent's libertine package \cite{Ten18} and redefines the mark formats to use its \texttt{textsuperscript} command.

4. In the sense of \texttt{\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:

\setsidenotes{
  note-mark-format=#1.,
  text-mark-format=\textsuperscript{\hspace*{.04em}#1},
  text-format+=\RaggedRight,
  perpage=true
}

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.
7 Implementation

% make sidenotes counted per page:
\perpage/.is if \snotez@perpage,
% count sidenotes per chapter:
\perchapter/.is if \snotez@perchapter,
% formatting of the note mark:
\note-mark-sep/.code = \renewcommand \snotez@note@mark@sep{#1},
\note-mark-format/.code = \renewcommand \snotez@note@mark@format[1][#1],
\text-mark-format/.code = \renewcommand \snotez@text@mark@format[1][#1],
% make all footnotes sidenotes:
\footnote/.is if \snotez@footnote,
% change optional argument input:
\dblarg/.is if \snotez@dblarg,
% formatting of the sidefloats' contents:
\sidefloat-format/.code = \renewcommand \snotez@sidefloat@format[1]{#1},
\sidefloat-format+/.code =
\expandafter\renewcommand\expandafter*\expandafter\snotez@sidefloat@format{\snotez@sidefloat@format[1]{#1}}
\ProcessPgfOptions*
\newrobustcmd \setsidenotes[1]{\pgfkeys{/snotez}{#1}}
% the \sidenote command
\AtBeginDocument{%}
\ifbool{snotez@dblarg}
\{\newrobustcmd \sidenote{snotez@sidenote@dblarg}
\} \{\newrobustcmd \sidenote{snotez@sidenote@modlarg}%
\} % syntax:
\{-sidenote{text}\}
\{-sidenote[mark]{text}\}
\{-sidenote[offset][mark]{text}\}
\newrobustcmd \sidenote{snotez@sidenote@dblarg}{%}
\ifnextchar[\{\sidenote{sidenote@dblarg@aux}{\{#1}}% no option
\protected\def\sidenote{sidenote@dblarg@aux[1]}{%}
\ifnextchar[\{\sidenote{sidenote@dblarg@aux}{\{#1}}% two options
\{\sidenote@sidenote@aux(){}{#1}}% one option
\}
% syntax:
\{-sidenote{text}\}
\{-sidenote[mark]{text}\}
\{-sidenote[offset]{text}\}
\{-sidenote[offset][mark]{text}\}
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\newrobustcmd\snotez@sidenote@nodblarg{% 
@ifnextchar{% 
\@ifnextchar{\snotez@sidenote@nodblarg@aux}% no offset but mark 
\{\snotez@sidenote@aux{}}% no offset and no mark 
}% 
}

\protected\def\snotez@sidenote@nodblarg@aux(#1)% 
@ifnextchar{% 
\{\snotez@sidenote@aux(#1)}% mark 
\{\snotez@sidenote@aux(#1)}% no mark 
}

% #1: offset 
% #2: mark 
% #3: text 
\long\def\snotez@sidenote@aux{#1\[#2\]#3}{% 
\snotez@mark{#2}% 
\snotez@text{#1}{#3}%
}

% this one is very much \@footnotemark from latex.ltx:
\newrobustcmd\snotez@write@mark[1]{% 
\leavevmode 
\ifhmode\edef\@x@sf\{\the\spacefactor}\nobreak\fi 
#1% 
\ifhmode\spacefactor\@x@sf\fi 
\relax 
}

\newrobustcmd\snotez@mark[1]{% 
\ifblank{#1}% or \ifstrempty? 
% \refstepcounter{sidenote}% 
\protected@edef\@the@snotez@mark{\thesidenote}% 
\snotez@write@mark{% 
\hbox{\snotez@text@mark@format{\@the@snotez@mark}}}% 
\newcounter{sidenote} 
\AtBeginDocument{% 
\ifltxcounter{chapter}{% 
\ifbool{snotez@perchapter}{\counterwithin*{sidenote}{chapter}}{}% 
}}%
7 Implementation

lines:

% the \sidenotemark command
\newrobustcmd*\sidenotemark[1]{\snotez@mark{#1}}

% the \sidenotetext command
\AtBeginDocument{
  \ifbool{snotez@dblarg}
    {\newrobustcmd*\sidenotetext{\snotez@sidenotetext@dblarg}}
    {\newrobustcmd*\sidenotetext{\snotez@sidenotetext@nodblarg}}
}

% syntax:
% - \sidenotetext{text}
% - \sidenotetext[mark]{text}
% - \sidenotetext[offset]{text}
% - \sidenotetext[offset][mark]{text}
\newrobustcmd*\snotez@sidenotetext@dblarg{\@ifnextchar\[\snotez@sidenotetext@dblarg@aux}{\snotez@sidenotetext@aux\{}% no option
\protected\def\snotez@sidenotetext@dblarg@aux[#1]{\@ifnextchar\[\snotez@sidenotetext@aux{#1}}% two options
\{\snotez@sidenotetext@aux{}\}}% one option
\)
\protected\def\snotez@sidenotetext@nodblarg{\@ifnextchar(\snotez@sidenotetext@nodblarg@aux}{\@ifnextchar\[\snotez@sidenotetext@aux{}% no offset nut mark
\{\snotez@sidenotetext@aux{}\}}% no offset and no mark
\}
\)
\protected\def\snotez@sidenotetext@nodblarg@aux(#1){\@ifnextchar\[\snotez@sidenotetext@aux{#1}}% mark
\{\snotez@sidenotetext@aux{}\}}% no mark
\)
\)
\protected\def\snotez@sidenotetext@nodblarg@aux(#1){\@ifnextchar\[\snotez@sidenotetext@aux{#1}}% mark
\{\snotez@sidenotetext@aux{}\}}% no mark
\)
\)
\protected\def\snotez@sidenotetext@aux{\@ifblank{#2}{\@protected@edef\@the@snotez@mark{#2}}}% #1: offset
\@ifnextchar\[\snotez@sidenotetext@aux{#1}}% #2: mark
\{\snotez@sidenotetext@aux{}\}}% #3: text
\@ifblank{#2}{\@protected@edef\@the@snotez@mark{#2}}
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\texttt{\textbackslash snotez@text[#1](#3)}\%

\texttt{\textbackslash ifblank[#1]}

\texttt{\textbackslash snotez@marginpar{\textbackslash snotez@write@mark{\textbackslash snotez@note@mark@format{\textbackslash @the@snotez@mark}}\textbackslash snotez@note@mark@sep#2}}\%

\texttt{\textbackslash snotez@marginnote{\textbackslash snotez@write@mark{\textbackslash snotez@note@mark@format{\textbackslash @the@snotez@mark}}\textbackslash snotez@note@mark@sep#2}}\%

\texttt{\textbackslash snotez@if@nblskip[#1]}\%

\texttt{\textbackslash snotez@if@nblskip[1]}\%

\texttt{\textbackslash expandafter\textbackslash if\textbackslash car\#1\textbackslash nil\textbackslash expandafter\@firstoftwo}\%

\texttt{\textbackslash if\textbackslash expandafter\textbackslash secondoftwo}\%

\texttt{\textbackslash @cdr\#1\textbackslash nil\textbackslash baselineskip}\%

\texttt{\textbackslash let\textbackslash snotez@marginpar\textbackslash marginpar}\%

\texttt{\textbackslash let\textbackslash snotez@marginnote\textbackslash marginnote}\%

\texttt{\textbackslash newenvironment\{snotez@sidefloat\}[2]}\%

\texttt{\textbackslash if\textbackslash def\textbackslash \textbackslash @caption\textbackslash settype\{\textbackslash \textbackslash @caption\textbackslash settype\{#1\}\textbackslash \textbackslash def\textbackslash \textbackslash @c@author\textbackslash type\{#1\}\textbackslash \textbackslash begin\textbackslash \textbackslash rbox\{\textbackslash snotez@sidefloat\textbackslash box\}\textbackslash \textbackslash minipage\{\textbackslash marginparwidth\}\textbackslash snotez@sidefloat\textbackslash format\textbackslash \textbackslash end\textbackslash \textbackslash rbox\textbackslash \textbackslash marginpar\textbackslash \textbackslash unhbox\textbackslash snotez@sidefloat\textbackslash box\}\textbackslash \endminipage}\%

\texttt{\textbackslash newcommand\{\textbackslash snotez@sidefloat\textbackslash format\}{\textbackslash \textbackslash raggedright}}\%

\texttt{\textbackslash newrobustcmd\{\textbackslash snotez@text\}[2]}\%

\texttt{\textbackslash ifblank[#1]}

\texttt{\textbackslash snotez@format}\%

\texttt{\textbackslash snotez@write@mark{\textbackslash snotez@note@mark@format{\textbackslash @the@snotez@mark}}\textbackslash snotez@note@mark@sep#2}}\%

\texttt{\textbackslash \textbackslash if\textbackslash expandafter\textbackslash secondoftwo}\%

\texttt{\textbackslash \textbackslash @cdr\#1\textbackslash nil\textbackslash baselineskip}\%

\texttt{\textbackslash let\textbackslash snotez@marginpar\textbackslash marginpar}\%

\texttt{\textbackslash let\textbackslash snotez@marginnote\textbackslash marginnote}\%

\texttt{\textbackslash newcommand\{\textbackslash snotez@if@nblskip\}[1]}\%

\texttt{\textbackslash if\#1\textbackslash starts\ with\ \ast\ \textbackslash gobble\ \textbackslash it\ \textbackslash and\ \textbackslash add\ \textbackslash baselineskip:\}\%

\texttt{\textbackslash \textbackslash expandafter\textbackslash if\textbackslash \textbackslash car\#1\textbackslash nil\textbackslash \textbackslash expandafter\textbackslash \textbackslash firstoftwo}\%

\texttt{\textbackslash \textbackslash if\textbackslash expandafter\textbackslash \textbackslash secondoftwo}\%

\texttt{\textbackslash \textbackslash @cdr\#1\textbackslash nil\textbackslash baselineskip}\%

\texttt{\textbackslash \textbackslash \textbackslash \textbackslash let\textbackslash snotez@marginpar\textbackslash marginpar}\%

\texttt{\textbackslash \textbackslash \textbackslash \textbackslash let\textbackslash snotez@marginnote\textbackslash marginnote}
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\newrobustcmd\snewz@new@sidefloat[2]{%
\newenvironment{side#1}{\snewz@sidefloat{#1}{#2}}{\endsnewz@sidefloat}%
\newrobustcmd\snewzfloat[2][2]{\snewz@new@sidefloat{#2}{#1}}
\snewzfloat{figure}
\snewzfloat{table}

% process preamble options:
\AtBeginDocument{
% if option `footnote=true' let \footnote to \sidenote:
\ifbool{snotez@footnote}{% 
\let\footnote\sidenote
\let\footnotemark\sidenotemark
\let\footnotetext\sidenotetext
\ifdef\multfootnote{\let\multfootnote\multsidenote}{}% 
}{%}
% if option `marginnote=true' use \marginnote for all notes:
\ifbool{snotez@marginnote}{% 
\let\snotez@marginpar\marginnote
\PackageInfo{snotez}{All sidenotes are now using \string\marginnote^^J
instead of \string\marginpar}%
}{%}
\AddToHook{begindocument/before}{% 
\ifbool{snotez@perpage}{
\RequirePackage{zref-perpage}
\zmakeperpage{sidenote} 
\@ifpackageloaded{hyperref}{\def\theHsidenote{\theHsection.\thesidenote}}{}% 
}{%}
\endinput

% HISTORY:
2012/11/15 v0.1 - first version
2013/04/03 v0.2 - documentation, removed erroneous `fnpct' adaption, other
minor changes
2013/04/21 v0.3 - try to avoid conflict with package loading order of
References

`perpage` and `zref-abspage`
- allow `*` syntax for offsets that are multiples of \baselineskip
- syntax change in optional arguments; option `dblarg`
provides previous syntax >> this is the default
- better separation of definition of `sidenote` and `sidenotetext` commands and the internal commands
2013/06/13 v0.3a  - robustify commands where appropriate
    - use `cnltx-base`
2013/11/21 v0.4  - remove dependency on `cnltx-base`
2020/01/12 v0.5  - fix issue #1
2020/12/14 v0.5a - fix issue #2
2022/02/10 v0.6  - add option `perchapter`
2022/02/12 v0.7  - make `snotez` and `caption` compatible

References

tufte-latex. version 3.5.2, 2010 (or newer).
url: https://www.ctan.org/pkg/tufte-latex/.

url: https://www.ctan.org/pkg/marginnote/.

[Nie22] Clemens Niederberger.
fnpc. version 1.1, Feb. 3, 2022 (or newer).
url: https://www.ctan.org/pkg/fnpct/.

url: https://www.ctan.org/pkg/zref/.

ragged2e. version 3.1, Dec. 15, 2021 (or newer).
url: https://www.ctan.org/pkg/ms/ragged2e/.

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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Package names are indicated sans serif, commands \texttt{\textbf{\textcolor{brown}{brown}}} and options \texttt{\textcolor{yellow}{yellow}}.

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