

# Editorial Notes for L<sup>A</sup>T<sub>E</sub>X\*

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## Abstract

This package defines a couple of editorial notes that simplify collaboration on a L<sup>A</sup>T<sub>E</sub>X text. These allow authors to annotate status information in the source. In draft mode, the annotations are shown for communication, and in publication mode these are suppressed.

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# 1 Introduction

When collaborating on a document with multiple authors, communication about the status of a given passage and intentions about what to do with it, indications about issues still need to be resolved, and directives to other authors, e.g. calling for help, or passing the baton, etc. make up much of the overhead involved in collaboration. In particular, many of the necessary communicative acts are centered around specific points or passages in the document at hand. Therefore it is natural to embed the communicative acts in the document source itself. The simplest version of this is to special markers like “(\*\*\* remember to rework this before publication \*\*\*)”, where the markers “(\*\*\*” and “\*\*\*)” serve as a visual aid and target for search and navigation tools in the editor. Of course this is dangerous, and we have all seen published texts with such markers still present.

The  $\LaTeX$  package described in here systematizes the idea and provides more conspicuous visual markers (as footnotes and margin notes) and a way of making all of these private markers and comments invisible for publication or outside communication.

The development version of this package can be found at <https://gl.kwarc.info/kwarc/macros/ed/>. Please submit any issues and feature requests there.

## 2 The User Interface

### 2.1 Package Options

As usual in  $\LaTeX$ , the package is loaded by `\usepackage[options]{ed}`, where [*options*] is optional and gives a comma separated list of options. The `ed` package takes the options `show` and `hide`, where `hide` is the default case, so that `\usepackage{ed}`, is equivalent to `\usepackage[hide]{ed}`. If the `show` option is given, then the editorial notes are presented as special annotations to the document, otherwise they are completely invisible — if you take care about spaces in the source code. For instance `text\ednote{...}\text` will fool  $\TeX$ ’s whitespace-collapsing algorithm and bring it to output two spaces in the document instead of just one as expected `text\ednote{...}\text` should be used instead! This `hide` option useful for preparing “clean” version for outside consumption without losing the management metadata.

The `hideOP` and `hideNP` options signal the `ed` package to hide the `oldpart` and `newpart` environments respectively (and the corresponding notes) as well.

In some situations the `\marginpar` decorations generated by editorial notes are disallowed, for these situations the `ed` package has the that uses notes by the `marginnote` package, and if that does not help, the `nomargins` option that disables them completely.

Finally, the `pdfbookmarks` option propts the `ed` package to add “ednote entries” into the pdf table of contents (the toc at the left of your PDF reader) that give a good overview over the ednote distribution.

As many classes support the `draft` and `final` options and pass them on to all loaded packages that will take them, the `ed` package supports them as aliases for `show` and `hide`.

### 2.2 Annotation Macros

The main user macro of this package is `\ednote`. It is used say what you have done or what should still be done at a given point in the document. `ed.sty` formats it like a footnote, but with a margin note that marks the place in the text, where the note is located. Otherwise, in the presence of multiple `\ednotes` in a page it may be difficult to find the referenced locations<sup>1</sup>. Editorial notes are numbered and marked in the margin for easy recognition. `\ednote` also takes an optional argument that is an identifier. This allows to cross-reference ednotes in each other.

The `\edissue` macro<sup>2</sup> is a variant of `\ednote` for issues that still have to be discussed among

<sup>1</sup>EDNOTE: this is an example of an ednote

<sup>2</sup>ISSUE: The control sequence `issue` conflicts with many other macro packages, maybe we should rename it to `edissue`.

show  
hide

hideOP  
hideNP

marginnote  
nomargins  
pdfbookmarks

draft  
final

\ednote

EdN:1

\edissue  
Is:2

the authors. For issues the labeling and cross-referencing in the optional argument is especially useful. Note that the `\issue` macro which earlier versions of the `ed` package provided is deprecated in favor of `\edissue`. The old `\issue` macro is only provided for backwards compatibility if it is not defined by other packages. For this to work, the `ed` package should be loaded late in the preamble.

`\tweak` Tw:3 The `\tweak` macro<sup>3</sup> is a variant of `\ednote` for marking places where we have tweaked something (apart from the standard way we usually use).

`todo` The `todo` environment is an environment that can be used to mark up writing tasks. These are inserted into the text in a different font, so that they are conspicuous as a foreign part, and take an argument for a comment.

`todolist` The `todolist` is a variant of the `todo` environment which is a is an itemized list.

ToDo The following is an example, generated from the the input `\begin{todolist}{an example todolist}`  
`... \item ... \end{todolist}`. To Do: an example todolist

1. lots of good examples
2. a general chapter about best practices

`newpart` the `newpart` environment can be used to mark up changed text blocks. `\begin{newpart}`

`oldpart` takes an argument that is interpreted as a comment and is treated like an `\ednote` comment. The `oldpart` environment is similar to `newpart` but is used for old parts of text copied from another document that still need to be changed in a document. They displayed in gray, so that they can be identified better.

The annotation macros have capitalized variants (`\Ednote`, `\edIssue`, `\Tweak`, `Todo`, `Newpart`, `Oldpart`) that do not make location marks in the margin. This is convenient in situations (e.g. inside boxes or minipages) that allow footnotes, but no margin notes.

## 2.3 Stubs and External Files

In some collaborative editing situations not all participants are willing to write L<sup>A</sup>T<sub>E</sub>X, but insist on developing their proposal parts in some other word processing software. The `ed` class offers the `edstub` environment:

`\begin{edstub}[<exp>]{<file>}` marks the content of the environment as provisional (e.g. by turning it blue) and lists an external file (*<file>*) as the original. Here, *<exp>* is an optional reformulation of the default description “The following blue text”. The following stub

The following blue text is only a provisional stub  
the Office document stub.doc contains more text  
which will be merged for the final document

here are some provisional ideas  
is generated by

```
\begin{edstub}{stub.doc}
here are some provisional ideas
\end{edstub}
```

`edstubURI` For hyperlinking *<file>* the `edstubURI` can be used to set a URI: After setting `\edstubURI{<URI>}` with a non-empty URI, *<file>* is hyperlinked to *<URI>/<file>*. If *<file>* is in the same directory as the current document, use `\edstubURI{.}`.

## 2.4 Generating Statistics and Explanations

`\ednotemessage` Up to version 1.6, the `ed` package had an explicit macro `\ednotemessage` that put just before the

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<sup>3</sup>TWEAK: this is an example of an tweak

`\end{document}` will generates a message with cardinality information for the ednotes into the log file. This macro is now deprecated, since the message is now automatically generated.

The `\edexplanation` macro generates an explanation of the best practices into the document. So that if you introduce collaboration partners to the `ed` package, you can give them an explanation “in-place”.

## 2.5 Configuration

The font shape of editorial annotations is governed by the parameter `\ednoteshape` the default is sans serif, specialize it to say italic by `\def\ednoteshape{\it}`. The labels in the footnotes and the margins can be tweaked (e.g. for localization:) with the `\ednotelabel` and `\ednotemargin` macros. Figure ?? shows the macros and defaults for `newpart`, `oldpart` and `todo` environments.

config macro	default	
<code>\ednotemargin</code>	EdN	
<code>\ednotelabel</code>	EdNote	
<code>\edissuemargin</code>	Is	
<code>\edissuelabel</code>	Issue	
<code>\newpartmargin</code>	BNP	ENP
<code>\newpartlabel</code>	BegNP	EndNP
<code>\oldpartmargin</code>	BOP	EOP
<code>\oldpartlabel</code>	BegOP	EndOP
<code>\todomargin</code>	ToDo	Done
<code>\todolabel</code>	ToDo	Done

Figure 1: Configuration Macros and their defaults

## 2.6 Best Practices

In a situation with multiple authors, we it is advisable to use the `\ednote` in the following form: `\ednote{author: some explanatory text}` to specify the originator of the note.

## 3 The Implementation

The implementation is rather standard. We first set up the options for the package.

### 3.1 Package Options

The main switch is `\showednotes`, which governs the visibility of the annotations.

```
1 (*package)
2 \newif\ifshowednotes\showednotesfalse
3 \newif\ifhideOP\hideOPfalse
4 \newif\ifhideNP\hideNPfalse
5 \newif\ifmargins\marginstrue
6 \newif\ifmarginnote\marginnotefalse
7 \newif\ifednotebookmarks\ednotebookmarksfalse
```

the next step is to declare the package options, they just set `\showednotes` switch accordingly.

```
8 \DeclareOption{show}{\showednotestrue\message{ed.sty: showing ednotes}}
9 \DeclareOption{hide}{\showednotesfalse\message{ed.sty: hiding ednotes}}
10 \DeclareOption{draft}{\showednotestrue\message{ed.sty: showing ednotes}}
11 \DeclareOption{final}{\showednotesfalse\message{ed.sty: hiding ednotes}}
12 \DeclareOption{hideOP}{\hideOPtrue\message{ed.sty: hiding oldparts}}
13 \DeclareOption{hideNP}{\hideNPtrue\message{ed.sty: hiding newparts}}
14 \DeclareOption{nomargins}{\marginfalse}
15 \DeclareOption{marginnote}{\marginnotetrue}
16 \DeclareOption{pdfbookmarks}{\ednotebookmarkstrue}
17 \ProcessOptions
```

The next step is to load the `verbatim` or `paralist` packages, so that we can either comment out the or use the `compactenum` environment for todo lists.

```
18 \ifshowednotes
19 \RequirePackage{paralist}
20 \RequirePackage{xcolor}
21 \ifmarginnote\RequirePackage{marginnote}\fi
22 \else
23 \RequirePackage{verbatim}
24 \fi
25 \ifhideOP\RequirePackage{comment}\fi
26 \ifhideNP\RequirePackage{comment}\fi
27 \ifednotebookmarks\RequirePackage{hyperref}\fi
```

This ends the package setup code, so we can come to the implementation of the functionality of the package.

### 3.2 Annotation Macros

`\ednoteshape` We start with the configuration part, predefining `\epdnoteshape` to be sans serif.

```
28 \newcommand\ednoteshape{\sffamily}
```

The next step is to set up a counter for the editorial annotations

```
29 \newcounter{ednote}
```

`\ed@foot` The internal macro `\ed@foot` is used to actually make the annotations, it is used by the interface macros to give the annotations. It takes three arguments: A comment text that goes into the footnote, a type descriptor, and an identifiers.

```
30 \newcommand\ed@foot[3]{% text, type, label
31 {\def\test{#3}\footnotetext[\arabic{ednote}]}%
32 {\scshape{#2}\if\@test\@empty\else\label{ed:#3}[{#3}]\fi} \ednoteshape #1}}
```

`\ed@mark` The internal macro `\ed@mark` is used to actually make footnote marks for the annotations. It takes a number as an argument and uses the

```

33 \def\ed@mark@style#1{#1}
34 \newcommand\ed@mark[1]{\ed@mark@style{\footnotemark[#1]}}
```

`\ed@footnote` extends the `\ed@foot` to a complete footnote

```

35 \newcommand\ed@footnote[3]{\ed@mark{\arabic{ednote}}\ed@foot{#1}{#2}{#3}}
```

`\ed@margin` The internal macro `\ed@margin` makes a `\marginpar` or `\marginnote` annotation if allowed.

```

36 \newcommand\ed@margin[1]{\ifmargins\ifmarginnote\marginnote{#1}\else\marginpar{#1}\fi\fi}
```

`\Ed@note` Another internal macro `\Ed@note` adds label management to `\ed@foot`

```

37 \newcommand\Ed@note[3]% text, type, label
38 {\addtocounter{ednote}{1}\message{#2!}%
39 \ifshowednotes\ed@footnote{#1}{#2}{#3}\ifednotebookmarks\belowpdfbookmark{#2: #1}{#2.\theednote}\fi\fi}
```

`\ed@note` `\ed@note` is a variant of `\Ed@note` that also makes an identifying mark in the margin.

```

40 \newcommand\ed@note[4]% text, type, label, margin
41 {\Ed@note{#1}{#2}{#3}\ifshowednotes\ed@margin{#4:\arabic{ednote}}\fi}
```

`\ednotelabel`

```

42 \newcommand\ednote@label{EdNote}
43 \newcommand\ednote@margin{EdN}
44 \newcommand\ednotelabel[1]{\def\ednote@label{#1}}
45 \newcommand\ednotemargin[1]{\def\ednote@margin{#1}}
```

`\ednote` with the `\Ed@note` and `\ed@note` macros it is very simple to get the desired functionality of `\Ednote` and `\ednote`:

```

46 \newcommand{\Ednote}[2] [] {\Ed@note{#2}\ednote@label{#1}}
47 \newcommand{\ednote}[2] [] {\ed@note{#2}\ednote@label{#1}\ednote@margin}
```

`\tweaklabel`

```

48 \newcommand\tweaklabel[1]{\def\tweak@label{#1}}
49 \newcommand\tweak@label{Tweak}
50 \newcommand\tweakmargin[1]{\def\tweak@margin{#1}}
51 \newcommand\tweak@margin{Tw}
```

`\tweak` and of course for `\tweak`:

```

52 \newcommand{\tweak}[2] [] {\ed@note{#2}\tweak@label{#1}\tweak@margin}
53 \newcommand{\Tweak}[2] [] {\Ed@note{#2}\tweak@label{#1}}
```

`\edissuelabel`

```

54 \newcommand\edissue@label{Issue}
55 \newcommand\edissuelabel[1]{\def\edissue@label{#1}}
56 \newcommand\edissue@margin{Is}
57 \newcommand\edissuemargin[1]{\def\edissue@margin{#1}}
```

`\edissue`

```

58 \providecommand{\issue}[2] [] {\ed@note{#2}\edissue@label{#1}\edissue@margin}
59 \providecommand{\Issue}[2] [] {\Ed@note{#2}\edissue@label{#1}}
60 \newcommand{\edissue}[2] [] {\ed@note{#2}\edissue@label{#1}\edissue@margin}
61 \newcommand{\edIssue}[2] [] {\Ed@note{#2}\edissue@label{#1}}
```

`Ed@part` For the text status environments `Newpart` and `Oldpart` we also set up an internal macro that does the work.

```

62 \newenvironment{Ed@part}[3]% text, mess, start
63 {\addtocounter{ednote}{1}\edef\new@number{\theednote}\message{#2!\new@number}}
64 \ifshowednotes\ed@foot{#1}{#2}{}\fi\ignorespaces}
65 {}
```

ed@part

```
66 \def\ed@part#1#2#3#4% text, mess, start, margin
67 {\Ed@part{#1}{#2}{#3}\ifshowednotes\ed@margin{#4:\new@number}\fi\ignorespaces}
68 \def\ended@part#1{\endEd@part\ifshowednotes\ed@margin{#1:\new@number}\fi}
```

newpartlabels

```
69 \newcommand\b@newpart@label{BegNP}\newcommand\e@newpart@label{EndNP}
70 \newcommand\b@newpart@margin{BNP}\newcommand\e@newpart@margin{ENP}
71 \newcommand\newpartlabels[2]{\def\b@newpart@label{#1}\def\e@newpart@label{#2}}
72 \newcommand\newpartmargins[2]{\def\b@newpart@margin{#1}\def\e@newpart@margin{#2}}
```

newpart We instantiate it for the newpart environment

```
73 \newenvironment{Newpart}[1]{\Ed@part{#1}{New Part}\b@newpart@label}{\endEd@part}
74 \newenvironment{newpart}[1]{\ed@part{#1}{New Part}\b@newpart@label\b@newpart@margin}{\ended@part\e@newpart@margin}
```

oldpartlabels

```
75 \newcommand\oldpartlabels[2]{\def\b@oldpart@label{#1}\def\e@oldpart@label{#2}}
76 \newcommand\oldpartmargins[2]{\def\b@oldpart@margin{#1}\def\e@oldpart@margin{#2}}
77 \newcommand\b@oldpart@label{BegOP}\newcommand\e@oldpart@label{EndOP}
78 \newcommand\b@oldpart@margin{BOP}\newcommand\e@oldpart@margin{EOP}
```

oldpart and of course for the oldpart environment

```
79 \newenvironment{Oldpart}[1]%
80 {\Ed@part{#1}{Old Part}\b@oldpart@label\ifshowednotes\color{gray}\fi}
81 {\endEd@part}
82 \newenvironment{oldpart}[1]%
83 {\ed@part{#1}{Old Part}\b@oldpart@label\b@oldpart@margin\ifshowednotes\color{gray}\fi}
84 {\ended@part\e@oldpart@margin}
85 \ifhideOP\excludecomment{oldpart}\excludecomment{Oldpart}\fi
86 \ifhideNP\excludecomment{newpart}\excludecomment{Newpart}\fi
```

todolabel

```
87 \newcommand\todolabels[2]{\def\b@todo@label{#1}\def\e@todo@label{#2}}
88 \newcommand\todomargins[2]{\def\b@todo@margin{#1}\def\e@todo@margin{#2}}
89 \newcommand\b@todo@label{ToDo}\newcommand\e@todo@label{Done}
90 \newcommand\b@todo@margin{ToDo}\newcommand\e@todo@margin{Done}
```

todo How we define the todo environment depends on the \showednotes switch (or the package option). If we hide annotations, todo is set to comment from the comment package, otherwise the body is set in sans serif font for emphasis.

```
91 \newenvironment{Todo}[1]%
92 {\Ed@part{#1}{To Do}\b@todo@label\ifshowednotes\bgroup\ednoteshape\else\comment\fi}
93 {\endEd@part\e@todo@label\ifshowednotes\egroup\else\endcomment\fi}
94 \newenvironment{todo}[1]%
95 {\ed@part{#1}{To Do}\b@todo@label\b@todo@margin\ifshowednotes\bgroup\ednoteshape\else\comment\fi}
96 {\ended@part\e@todo@margin\ifshowednotes\egroup\else\endcomment\fi}
```

todolist How we define the todolist environment depends on the \showednotes switch (or the package option). If we hide annotations, todolist is set to comment from the comment package, otherwise it is set to an itemize.

```
97 \newenvironment{Todolist}[1]{% the comment
98 \ifshowednotes\message{todolist!}{\ednoteshape To Do: #1}\bgroup\ednoteshape\begin{compactenum}%
99 \else\comment%
100 \fi}
101 {\ifshowednotes\end{compactenum}\egroup\else\endcomment\fi}
102 \newenvironment{todolist}[1]{\ifshowednotes\ed@margin{\ednoteshape ToDo}\Todolist{#1}\fi}
103 {\endTodolist}
```

musings

```
104 \newenvironment{musings}{\ifshowednotes\color{blue}\fi}{}
```

\edstubURI

```
105 \def\ed@stubURI{}
106 \newcommand\edstuURI[1]{\gdef\ed@stubURI{#1}}
```

### 3.3 Stubs and External Files

edstub

```
107 \newif\ifhref\hreffalse
108 \AtBeginDocument{\@ifpackageloaded{hyperref}{\hreftrue}{\hreffalse}}
109 \newenvironment{edstub}[2] []
110 {\def@test{#1}\begin{center}\huge\color{red}
111 \ifx@test@empty The following blue text \else #1 \fi is only a provisional stub\\Large
112 the Office document
113 \ifx\ed@stubURI@empty{#2}\else\ifhref\href{\ed@stubURI}{#2}\else{#2}\fi\fi\
114 contains more text\\which will be merged for the final document
115 \end{center}\color{blue}}
116 {}
```

### 3.4 Generating Statistics and Explanations

\ednotemessage The \ednotemessage makes use of the counter ednote and generates a message.

```
117 \newcommand\ednotemessage{\ifnum\value{ednote}>0\typeout{}%
118 \typeout{There are still \arabic{ednote} EdNotes, New/Oldparts, and Issues to resolve!}%
119 \typeout{}}\fi}
```

we output it automatically at the end of the log file.

```
120 \AtEndDocument{\ednotemessage}
```

\ednotemessage The old \ednotemessage is now deprecated

```
121 \newcommand\ednotemessage{\PackageWarning{ed}{The ‘\ednotemessage’ macro is obsolete, the message
122 is generated automatically now.}}
```

\edexplanation The \edexplanation macro makes use of the todolist environment.

```
123 \newcommand\edexplanation{\todolist{we will use the ednote system to communicate}
124 \item use the {\tt{\char92ednote\char123author: some explanatory text\char125}}
125 like a footnote to say what you have done or what should still be
126 done\ednote{MiKo: this is an example of an ednote}. Ednotes are numbered and
127 marked in the margin for easy recognition.
128 \item use the {\tt{\char92issue\char123author: explanation of the
129 issue\char125}} variant of ednote for issues\issue{this is an example of
130 an issue} that still have to be discussed.
131 \item finally, the {\tt{todolist}} environment is a list environment that can be
132 used to mark up todo lists. This explanation is an example of a todo list, it
133 is inserted into the text in a different font.
134 \item the {\tt{newpart}} environment can be used to mark up changed text blocks.
135 {\tt{\char92begin\char123newpart\char125}} takes an argument that is
136 interpreted as a comment and is treated like an {\tt{\char92ednote}} comment.
137 \item the {\tt{oldpart}} environment is similar to {\tt{newpart}} but is used
138 for old parts of text copied from another document that still need to be
139 changed in a document.
140 \item putting the macro {\tt{\char92ednotemessage}} just before the
141 {\tt{\char92end\char123document\char125}} will generate a message with
142 cardinality information for the ednotes into the log file.
143 \item all of these text decorations and meta-annotations are only inserted into
```



```

144 the text, if the {\tt{show}} package option in the {\tt{\char92 usepackage}}
145 directive in the preamble of the document is set: {\tt{\char92
146     usepackage[show]\char123ed\char125}} will show the decorations, while
147 {\tt{\char92 usepackage\char123ed\char125}} will not. This is useful for
148 preparing ‘‘clean’’ version for outside consumption without loosing the
149 management metadata.
150 \endtodolist}
151 \end{package}

```