

*Cubic surfaces*

# 27 Lines

FIRST EDITION

*Del Pezzo surfaces*

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*Dedicated to those who appreciate L<sup>A</sup>T<sub>E</sub>X  
and the work of Edward R. Tufte and Donald E. Knuth.*



## *Introduction*

It is a celebrated fact that there are 27 lines over a smooth cubic surface in  $\mathbb{P}^3(\mathbb{C})$ . In this note, we try to explore this fact with wider generality and deeper interpretation.



# **Part I**

## **Prerequisites**



# Field theory

**Theorem-Definition 1.** Let  $k$  be a field and  $\bar{k}$  one of its algebraic closure. Then the following assertions are equivalent.

1.  $\text{char } k = 0$  or  $\text{char } k = p$  and  $k^p = k$ .
2. Every irreducible polynomial  $f$  over  $k$  is separable.
3. Every finite extension  $K/k$  is separable.
4. Every algebraic extension  $L/k$  is separable.

If  $k$  satisfies one of the assertions, then  $k$  is called a **perfect field**.

*Proof.* We show that  $2 \iff 3 \iff 4$  and then  $1 \iff 2$ .

Suppose 2. Let  $L/k$  be an algebraic extension and  $\alpha \in L$ . Let  $f(X)$  be the minimal polynomial of  $\alpha$  over  $k$ . Then  $f$  is separable and in turn  $L/k$  is a separable extension. Therefore  $2 \implies 4$ . Since every finite extension  $K/k$  is algebraic, we see that  $4 \implies 3$ .

Next we suppose 3. Let  $f$  be an irreducible extension over  $k$  with a root  $\alpha \in \bar{k}$ . Then  $k(\alpha)/k$  is finite and  $f$ , the minimal polynomial of  $\alpha \in k(\alpha)$ , is separable.

If  $k$  is of characteristic 0,  $f$  is an irreducible polynomial over  $k$ , then  $f' \neq 0$ . It follows that  $\gcd(f, f') = 1$  because  $f$  is irreducible. Therefore  $f$  is separable.

If  $\text{char } k = p$  and  $k^p = k$ , we show that an inseparable polynomial is not irreducible. Indeed, let  $f(X) \in k[X]$  be an inseparable polynomial, with roots  $\alpha_1, \dots, \alpha_k \in \bar{k}$  as its roots. Then there exists  $m > 0$  such that  $f(X) = \prod_{j=1}^k (X - \alpha_j)^{p^m}$ , and as a result  $f'(X) = 0$ . Therefore  $f(X)$  is actually a polynomial in  $X^p$  and we can write

$$f(X) = a_\ell X^{p^\ell} + \cdots + a_1 X^p + a_0.$$

Since  $k = k^p$ , for each  $a_i \in k$ , there is  $b_i \in k$  such that  $a_i = b_i^p$  and as a result

$$f(X) = (b_\ell X^\ell + \cdots + b_1 X + b_0)^p$$

is not irreducible. With this being said, if  $\text{char } k = p$  and  $k^p = k$ , then 2 is true.

Finally we suppose that 1 is false. Then  $\text{char } k = p > 0$  and  $k^p \neq k$ . Pick  $a \in k \setminus k^p$ . Then we investigate the polynomial  $f(X) = X^p - a = (X - a^{1/p})^p$ . To begin with,  $f(X)$  is irreducible over  $k$  because otherwise we have  $a^{1/p} \in k$ , i.e.  $a \in k^p$ . However, we notice that  $f'(X) = 0$  therefore  $f$  is not separable and 2 is then not true.  $\square$

We are always interested in the following three objects in algebra:

- $k$  a perfect field.
- $\bar{k}$  the algebraic closure of  $k$ .
- $G(\bar{k}/k)$  the Galois group of  $\bar{k}$  over  $k$ .

Immediate examples of perfect fields include all fields of characteristic 0 and finite fields. The field of rational functions over a finite field is not perfect.

We make the choice of perfect fields for several reasons. First of all, we do not exclude the classical case, that is, the cubic surface over the field of complex numbers. The geometry of finite fields, although not visualizable, is of its own interest so they will join the party as well. However, we do not welcome all fields because we do not want to deal with the case of multiple roots. Besides, the Galois theory becomes less interesting over an imperfect field<sup>1</sup>.

We have to include algebraic closure because we need to ensure that geometrical information is not lost. For example, the Fermat's cubic surface in  $\mathbb{P}^3(\mathbb{C})$  is the zero locus of the homogeneous polynomial  $x^3 + y^3 + z^3 + w^3 = 0$ . One can explicitly write down the 27 lines and many of them have complex coefficients. As a consequence, working only on  $\mathbb{R}$  will prevent us from finding all lines.

<sup>1</sup> Recall that a Galois extension is normal and separable. If we do not choose perfect fields, we may have to work around inseparable extensions, which complicates the study in an unnecessary manner.

# Geometry

## Grassmannian

Let  $K$  be an algebraically closed field. In this section, we will develop the concept of Grassmannian, which gives us a way to find the 27 lines.

**Definition 1.** The Grassmannian variety  $G(k, n)$  for  $0 \leq k \leq n$  is defined to be<sup>2</sup>

$$G(n, k) = \{V \text{ subspace of } K^n : \dim V = k\}.$$

In the work of 27 lines, we will work with  $G(2, 4)$ , which denotes the (projective) lines over the (projective) space. In order to make  $G(k, n)$  a *de facto* variety, we will introduce the Plücker coordinate system. The idea of the coordinate system is simple: every  $U \in G(k, n)$  admits a basis consisting of  $k$  vectors  $\{u_1, \dots, u_k\}$  of dimension  $n$ , thus we have a  $n \times k$  matrix whose columns are  $u_1, \dots, u_d$ . We also want to pay respect to the order of vectors in the basis chosen. A tool that can track the order of vectors is the determinant function, who is generalized by wedge product.

**Definition 2.** The Plücker map  $p : G(k, n) \rightarrow \mathbb{P}(\Lambda^d K^n)$  is defined as follows. Let  $U \in G(k, n)$  be an element with basis  $\{u_1, \dots, u_k\}$ , then  $p(U) = [u_1 \wedge \dots \wedge u_k]$ .

We need to show that it is legitimate to use the Plücker map to give a coordinate of a Grassmannian variety.

**Theorem 1.** Let  $p : G(k, n) \rightarrow \mathbb{P}(\Lambda^k K^n)$  be the Plücker map. Then

1.  $p$  is well-defined;
2.  $p$  is injective.

*Proof.* To show that  $p$  is well-defined, we need to show that  $p$  does not depend on the basis chosen for an element  $U \in G(k, n)$ . For  $U \in G(k, n)$ , pick two basis  $\{u_1, \dots, u_k\}$  and  $\{u'_1, \dots, u'_k\}$ . Then each  $u'_i$  can be written in the form  $u'_i = \sum_{j=1}^k a_{ij} u_j$ . Let  $C = (a_{ij})$ , then  $C$  is invertible and the anti-commutativity of wedge product yields

$$u'_1 \wedge \dots \wedge u'_k = \det(C) u_1 \wedge \dots \wedge u_k$$

<sup>2</sup> As a matter of convention, some mathematicians will write it as  $G(n, k)$ .

therefore  $u'_1 \wedge \cdots \wedge u'_k$  and  $u_1 \wedge \cdots \wedge u_k$  represent the same element in  $\mathbb{P}(\bigwedge^d K^n)$ .

To show that  $p$  is injective, pick  $U = \langle u_1, \dots, u_k \rangle$  and  $V = \langle v_1, \dots, v_k \rangle$  in  $G(k, n)$  such that  $p(U) = p(V)$ . Let  $u = u_1 \wedge \cdots \wedge u_k$  and  $v = v_1 \wedge \cdots \wedge v_k$ , then  $u = \lambda v$  for some  $\lambda \in \mathbb{C}^\times$ . It follows that  $u_i \wedge v = u_i \wedge u = 0$  and  $v_i \wedge u = v_i \wedge v = 0$  for all  $i$ . However the kernel of  $K^n \mapsto \bigwedge^{k+1} K^n$  defined by  $x \mapsto x \wedge u$  is  $U$  and likewise the kernel of  $x \mapsto x \wedge v$  is  $V$ . Therefore we must have  $u_i \in V$  and  $v_i \in U$  for all  $i$ , which shows that  $U = V$ .  $\square$

We demand two things from the Plücker map, or alternatively, from  $\mathbb{P}(\bigwedge^k K^n)$ . First of all, this application should allow us to do elementary calculation using elements in  $\mathbb{P}(\bigwedge^k K^n)$ , which can be explicitly represented. Secondly, we want to make sure that the embedding of  $G(k, n)$  into  $\mathbb{P}(\bigwedge^k K^n)$  makes sense in algebraic geometry. For these reasons, we define the Plücker coordinates.

To begin with, we notice that for a  $K$ -vector space of dimension  $n$  and  $0 < k < n$ , we have a natural isomorphism

$$\bigwedge^k V \cong \left( \bigwedge^{n-k} V \right)^* \cong \bigwedge^{n-k} V^*.$$

The first identification comes from the map induced by the wedge product:

$$\begin{aligned} \bigwedge^k V \times \bigwedge^{n-k} V &\rightarrow \bigwedge^n V \cong K, \\ (x, y) &\mapsto x \wedge y. \end{aligned}$$

On the other hand we have  $\left( \bigwedge^{n-k} V \right)^* \cong \bigwedge^{n-k} V^*$  due to the following pairing:

$$\begin{aligned} \bigwedge^{n-k} V^* \times \bigwedge^{n-k} V &\rightarrow \bigwedge^n V \cong K, \\ (f_1 \wedge \cdots \wedge f_{n-k}, g_1 \wedge \cdots \wedge g_{n-k}) &\mapsto \det(f_i(g_j)). \end{aligned}$$

As a matter of notation, we shall denote  $\{e_1, \dots, e_n\}$  the canonical basis of  $K^n$ , and  $\{e_1^*, \dots, e_n^*\}$  the dual basis such that  $e_i^*(e_j) = \delta_{ij}$ , the Kronecker delta at value  $(i, j)$ . Let  $I_{k,n} = \{\underline{i} = (i_1, \dots, i_k) : 1 \leq i_1 < \cdots < i_k \leq n\}$  be the set of ordered  $(k, n)$ -tuples, we can then assign a basis  $\{e_{\underline{i}} = e_{i_1} \wedge \cdots \wedge e_{i_k} : \underline{i} \in I_{k,n}\}$  to  $\bigwedge^k V$ . On the other hand,  $\{p_{\underline{i}} = e_{i_1}^* \wedge \cdots \wedge e_{i_k}^* : \underline{i} \in I_{k,n}\}$  is the dual basis of  $\{e_{\underline{i}}\}$  as we have

$$p_{\underline{i}}(e_j) = \det(e_{i_\ell}^*(e_{j_m}))_{1 \leq \ell, m \leq k} = \delta_{ij}.$$

The dual vectors  $\{p_{\underline{i}}\}$  defines a set of projective coordinates which are the *Plücker coordinates*.

# *On the Use of the *tufte-book* Document Class*

The Tufte-L<sup>A</sup>T<sub>E</sub>X document classes define a style similar to the style Edward Tufte uses in his books and handouts. Tufte's style is known for its extensive use of sidenotes, tight integration of graphics with text, and well-set typography. This document aims to be at once a demonstration of the features of the Tufte-L<sup>A</sup>T<sub>E</sub>X document classes and a style guide to their use.

## *Page Layout*

### *Headings*

This style provides A- and B-heads (that is, \section and \subsection), demonstrated above.

If you need more than two levels of section headings, you'll have to define them yourself at the moment; there are no pre-defined styles for anything below a \subsection. As Bringhurst points out in *The Elements of Typographic Style*,<sup>3</sup> you should "use as many levels of headings as you need: no more, and no fewer."

<sup>3</sup> Bringhurst2005

The Tufte-L<sup>A</sup>T<sub>E</sub>X classes will emit an error if you try to use \subsubsection and smaller headings.

IN HIS LATER BOOKS,<sup>4</sup> Tufte starts each section with a bit of vertical space, a non-indented paragraph, and sets the first few words of the sentence in SMALL CAPS. To accomplish this using this style, use the \newthought command:

<sup>4</sup> Tufte2006

```
\newthought{In his later books}, Tufte starts...
```

## *Sidenotes*

One of the most prominent and distinctive features of this style is the extensive use of sidenotes. There is a wide margin to provide ample room for sidenotes and small figures. Any \footnotes will automatically be converted to sidenotes.<sup>5</sup> If you'd like to place ancillary information in the margin without the sidenote mark (the superscript number), you can use the \marginnote command.

<sup>5</sup> This is a sidenote that was entered using the \footnote command.

This is a margin note. Notice that there isn't a number preceding the note, and there is no number in the main text where this note was written.

The specification of the `\sidenote` command is:

```
\sidenote[<number>][<offset>]{Sidenote text.}
```

Both the `<number>` and `<offset>` arguments are optional. If you provide a `<number>` argument, then that number will be used as the sidenote number. It will change of the number of the current sidenote only and will not affect the numbering sequence of subsequent sidenotes.

Sometimes a sidenote may run over the top of other text or graphics in the margin space. If this happens, you can adjust the vertical position of the sidenote by providing a dimension in the `<offset>` argument. Some examples of valid dimensions are:

```
1.0in    2.54cm    254mm    6\baselineskip
```

If the dimension is positive it will push the sidenote down the page; if the dimension is negative, it will move the sidenote up the page.

While both the `<number>` and `<offset>` arguments are optional, they must be provided in order. To adjust the vertical position of the sidenote while leaving the sidenote number alone, use the following syntax:

```
\sidenote[] [<offset>]{Sidenote text.}
```

The empty brackets tell the `\sidenote` command to use the default sidenote number.

If you *only* want to change the sidenote number, however, you may completely omit the `<offset>` argument:

```
\sidenote[<number>]{Sidenote text.}
```

The `\marginnote` command has a similar `offset` argument:

```
\marginnote[<offset>]{Margin note text.}
```

## References

References are placed alongside their citations as sidenotes, as well. This can be accomplished using the normal `\cite` command.<sup>6</sup>

The complete list of references may also be printed automatically by using the `\bibliography` command. (See the end of this document for an example.) If you do not want to print a bibliography at the end of your document, use the `\nobibliography` command in its place.

To enter multiple citations at one location,<sup>7</sup> you can provide a list of keys separated by commas and the same optional vertical offset argument: `\cite{Tufte2006,Tufte1990}`.

```
\cite[<offset>]{bibkey1,bibkey2,...}
```

<sup>6</sup> The first paragraph of this document includes a citation.

<sup>7</sup> Tufte2006, Tufte1990

## Figures and Tables

Images and graphics play an integral role in Tufte's work. In addition to the standard `figure` and `tabular` environments, this style provides special figure and table environments for full-width floats.

Full page-width figures and tables may be placed in `figure*` or `table*` environments. To place figures or tables in the margin, use the `marginfigure` or `margintable` environments as follows (see figure 1):

```
\begin{marginfigure}
\includegraphics{helix}
\caption{This is a margin figure.}
\label{fig:marginfig}
\end{marginfigure}
```

The `marginfigure` and `margintable` environments accept an optional parameter `<offset>` that adjusts the vertical position of the figure or table. See the "Sidenotes" section above for examples. The specifications are:

```
\begin{marginfigure}[\langle offset \rangle]
...
\end{marginfigure}

\begin{margintable}[\langle offset \rangle]
...
\end{margintable}
```

Figure 2 is an example of the `figure*` environment and figure 3 is an example of the normal `figure` environment.

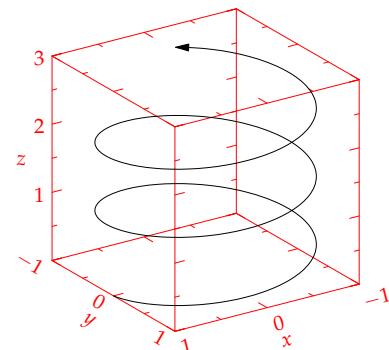


Figure 1: This is a margin figure. The helix is defined by  $x = \cos(2\pi z)$ ,  $y = \sin(2\pi z)$ , and  $z = [0, 2.7]$ . The figure was drawn using Asymptote (<http://asymptote.sourceforge.net/>).

Figure 2 is an example of the `figure*` environment and figure 3 is an example of the normal `figure` environment.

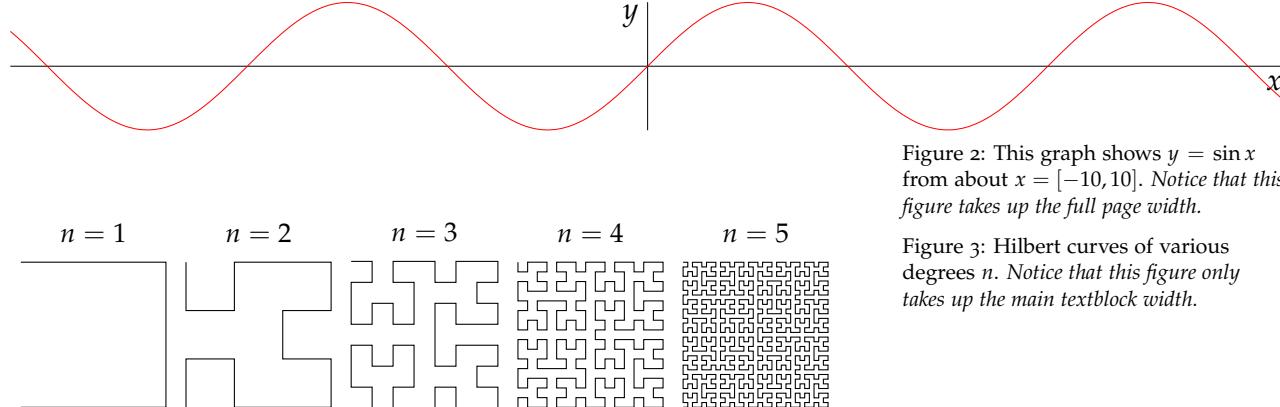


Figure 2: This graph shows  $y = \sin x$  from about  $x = [-10, 10]$ . Notice that this figure takes up the full page width.

Figure 3: Hilbert curves of various degrees  $n$ . Notice that this figure only takes up the main textblock width.

As with sidenotes and marginnotes, a caption may sometimes require vertical adjustment. The `\caption` command now takes a

second optional argument that enables you to do this by providing a dimension  $\langle offset \rangle$ . You may specify the caption in any one of the following forms:

```
\caption{\textit{long caption}}
\caption[\textit{short caption}]{\textit{long caption}}
\caption[]{\textit{offset}}{\textit{long caption}}
\caption[\textit{short caption}]{\textit{offset}}{\textit{long caption}}
```

A positive  $\langle offset \rangle$  will push the caption down the page. The short caption, if provided, is what appears in the list of figures/tables, otherwise the “long” caption appears there. Note that although the arguments  $\langle short\ caption \rangle$  and  $\langle offset \rangle$  are both optional, they must be provided in order. Thus, to specify an  $\langle offset \rangle$  without specifying a  $\langle short\ caption \rangle$ , you must include the first set of empty brackets [], which tell `\caption` to use the default “long” caption. As an example, the caption to figure 3 above was given in the form

```
\caption[Hilbert curves...][6pt]{Hilbert curves...}
```

Table 1 shows table created with the `booktabs` package. Notice the lack of vertical rules—they serve only to clutter the table’s data.

Margin	Length
Paper width	8½ inches
Paper height	11 inches
Textblock width	6½ inches
Textblock/sidenote gutter	¾ inches
Sidenote width	2 inches

Table 1: Here are the dimensions of the various margins used in the Tufte-handout class.

OCCASIONALLY  $\text{\LaTeX}$  will generate an error message:

Error: Too many unprocessed floats

$\text{\LaTeX}$  tries to place floats in the best position on the page. Until it’s finished composing the page, however, it won’t know where those positions are. If you have a lot of floats on a page (including sidenotes, margin notes, figures, tables, etc.),  $\text{\LaTeX}$  may run out of “slots” to keep track of them and will generate the above error.

$\text{\LaTeX}$  initially allocates 18 slots for storing floats. To work around this limitation, the Tufte- $\text{\LaTeX}$  document classes provide a `\morefloats` command that will reserve more slots.

The first time `\morefloats` is called, it allocates an additional 34 slots. The second time `\morefloats` is called, it allocates another 26 slots.

The `\morefloats` command may only be used two times. Calling it a third time will generate an error message. (This is because we can’t safely allocate many more floats or  $\text{\LaTeX}$  will run out of memory.)

If, after using the `\morefloats` command twice, you continue to get the `Too many unprocessed floats` error, there are a couple things you can do.

The `\FloatBarrier` command will immediately process all the floats before typesetting more material. Since `\FloatBarrier` will start a new paragraph, you should place this command at the beginning or end of a paragraph.

The `\clearpage` command will also process the floats before continuing, but instead of starting a new paragraph, it will start a new page.

You can also try moving your floats around a bit: move a figure or table to the next page or reduce the number of sidenotes. (Each sidenote actually uses *two* slots.)

After the floats have placed, L<sup>A</sup>T<sub>E</sub>X will mark those slots as unused so they are available for the next page to be composed.

### *Captions*

You may notice that the captions are sometimes misaligned. Due to the way L<sup>A</sup>T<sub>E</sub>X's float mechanism works, we can't know for sure where it decided to put a float. Therefore, the Tufte-L<sup>A</sup>T<sub>E</sub>X document classes provide commands to override the caption position.

*Vertical alignment* To override the vertical alignment, use the `\setfloatalignment` command inside the float environment. For example:

```
\begin{figure}[btp]
  \includegraphics{sinewave}
  \caption{This is an example of a sine wave.}
  \label{fig:sinewave}
  \setfloatalignment{b}% forces caption to be bottom-aligned
\end{figure}
```

The syntax of the `\setfloatalignment` command is:

```
\setfloatalignment{\langle pos \rangle}
```

where `\langle pos \rangle` can be either `b` for bottom-aligned captions, or `t` for top-aligned captions.

*Horizontal alignment* To override the horizontal alignment, use either the `\forceversofloat` or the `\forcerectofloat` command inside of the float environment. For example:

```
\begin{figure}[btp]
  \includegraphics{sinewave}
  \caption{This is an example of a sine wave.}
  \label{fig:sinewave}
  \forceversofloat% forces caption to be set to the left of the float
\end{figure}
```

The `\forceversofloat` command causes the algorithm to assume the float has been placed on a verso page—that is, a page on the left side of a two-page spread. Conversely, the `\forcecorrectoffloat` command causes the algorithm to assume the float has been placed on a recto page—that is, a page on the right side of a two-page spread.

### *Full-width text blocks*

In addition to the new float types, there is a `fullwidth` environment that stretches across the main text block and the sidenotes area.

```
\begin{fullwidth}
Lorem ipsum dolor sit amet...
\end{fullwidth}
```

*Lorem ipsum dolor sit amet, consectetur adipiscing elit. Ut purus elit, vestibulum ut, placerat ac, adipiscing vitae, felis. Curabitur dictum gravida mauris. Nam arcu libero, nonummy eget, consectetur id, vulputate a, magna. Donec vehicula augue eu neque. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Mauris ut leo. Cras viverra metus rhoncus sem. Nulla et lectus vestibulum urna fringilla ultrices. Phasellus eu tellus sit amet tortor gravida placerat. Integer sapien est, iaculis in, pretium quis, viverra ac, nunc. Praesent eget sem vel leo ultrices bibendum. Aenean faucibus. Morbi dolor nulla, malesuada eu, pulvinar at, mollis ac, nulla. Curabitur auctor semper nulla. Donec varius orci eget risus. Duis nibh mi, congue eu, accumsan eleifend, sagittis quis, diam. Duis eget orci sit amet orci dignissim rutrum.*

### *Typography*

#### *Typefaces*

If the Palatino, Helvetica, and Bera Mono typefaces are installed, this style will use them automatically. Otherwise, we'll fall back on the Computer Modern typefaces.

#### *Letterspacing*

This document class includes two new commands and some improvements on existing commands for letterspacing.

When setting strings of ALL CAPS or SMALL CAPS, the letterspacing—that is, the spacing between the letters—should be increased slightly.<sup>8</sup> The `\allcaps` command has proper letterspacing for strings of FULL CAPITAL LETTERS, and the `\smallcaps` command has letterspacing for SMALL CAPITAL LETTERS. These commands will also automatically convert the case of the text to upper- or lowercase, respectively.

The `\textsc` command has also been redefined to include letterspacing. The case of the `\textsc` argument is left as is, however. This allows one to use both uppercase and lowercase letters: THE INITIAL LETTERS OF THE WORDS IN THIS SENTENCE ARE CAPITALIZED.

<sup>8</sup> Bringhurst2005

## *Document Class Options*

The `tufte-book` class is based on the L<sup>A</sup>T<sub>E</sub>X book document class. Therefore, you can pass any of the typical book options. There are a few options that are specific to the `tufte-book` document class, however.

The `a4paper` option will set the paper size to A4 instead of the default us letter size.

The `sfsidenotes` option will set the sidenotes and title block in a sans serif typeface instead of the default roman.

The `twoside` option will modify the running heads so that the page number is printed on the outside edge (as opposed to always printing the page number on the right-side edge in `oneside` mode).

The `symmetric` option typesets the sidenotes on the outside edge of the page. This is how books are traditionally printed, but is contrary to Tufte's book design which sets the sidenotes on the right side of the page. This option implicitly sets the `twoside` option.

The `justified` option sets all the text fully justified (flush left and right). The default is to set the text ragged right. The body text of Tufte's books are set ragged right. This prevents needless hyphenation and makes it easier to read the text in the slightly narrower column.

The `bidi` option loads the `bidi` package which is used with X<sub>E</sub>L<sup>A</sup>T<sub>E</sub>X to typeset bi-directional text. Since the `bidi` package needs to be loaded before the sidenotes and cite commands are defined, it can't be loaded in the document preamble.

The `debug` option causes the Tufte-L<sup>A</sup>T<sub>E</sub>X classes to output debug information to the log file which is useful in troubleshooting bugs. It will also cause the graphics to be replaced by outlines.

The `nofonts` option prevents the Tufte-L<sup>A</sup>T<sub>E</sub>X classes from automatically loading the Palatino and Helvetica typefaces. You should use this option if you wish to load your own fonts. If you're using X<sub>E</sub>L<sup>A</sup>T<sub>E</sub>X, this option is implied (*i.e.*, the Palatino and Helvetica fonts aren't loaded if you use X<sub>E</sub>L<sup>A</sup>T<sub>E</sub>X).

The `nols` option inhibits the letterspacing code. The Tufte-L<sup>A</sup>T<sub>E</sub>X classes try to load the appropriate letterspacing package (either pdfL<sup>A</sup>T<sub>E</sub>X's `letterspace` package or the `soul` package). If you're using X<sub>E</sub>L<sup>A</sup>T<sub>E</sub>X with `fontenc`, however, you should configure your own letterspacing.

The `notitlepage` option causes `\maketitle` to generate a title block instead of a title page. The book class defaults to a title page and the handout class defaults to the title block. There is an analogous `titlepage` option that forces `\maketitle` to generate a full title page instead of the title block.

The `notoc` option suppresses Tufte-L<sup>A</sup>T<sub>E</sub>X's custom table of contents (toc) design. The current toc design only shows unnumbered chapter titles; it doesn't show sections or subsections. The `notoc` option will revert to L<sup>A</sup>T<sub>E</sub>X's toc design.

The `nohyper` option prevents the `hyperref` package from being loaded. The default is to load the `hyperref` package and use the `\title` and `\author` contents as metadata for the generated PDF.

# *Customizing Tufte-L<sup>A</sup>T<sub>E</sub>X*

The Tufte-L<sup>A</sup>T<sub>E</sub>X document classes are designed to closely emulate Tufte's book design by default. However, each document is different and you may encounter situations where the default settings are insufficient. This chapter explores many of the ways you can adjust the Tufte-L<sup>A</sup>T<sub>E</sub>X document classes to better fit your needs.

## *File Hooks*

If you create many documents using the Tufte-L<sup>A</sup>T<sub>E</sub>X classes, it's easier to store your customizations in a separate file instead of copying them into the preamble of each document. The Tufte-L<sup>A</sup>T<sub>E</sub>X classes provide three file hooks: `tufte-common-local.tex`, `tufte-book-local.tex`, and `tufte-handout-local.tex`.

*tufte-common-local.tex* If this file exists, it will be loaded by all of the Tufte-L<sup>A</sup>T<sub>E</sub>X document classes just prior to any document-class-specific code. If your customizations or code should be included in both the book and handout classes, use this file hook.

*tufte-book-local.tex* If this file exists, it will be loaded after all of the common and book-specific code has been read. If your customizations apply only to the book class, use this file hook.

*tufte-common-handout.tex* If this file exists, it will be loaded after all of the common and handout-specific code has been read. If your customizations apply only to the handout class, use this file hook.

## *Numbered Section Headings*

While Tufte dispenses with numbered headings in his books, if you require them, they can be enabled by changing the value of the `secnumdepth` counter. From the table below, select the heading level at which numbering should stop and set the `secnumdepth` counter to that value. For example, if you want parts and chapters numbered,

but don't want numbering for sections or subsections, use the command:

```
\setcounter{secnumdepth}{0}
```

The default `secnumdepth` for the Tufte-L<sup>A</sup>T<sub>E</sub>X document classes is `-1`.

Heading level	Value
Part (in <code>tufte-book</code> )	-1
Part (in <code>tufte-handout</code> )	0
Chapter (only in <code>tufte-book</code> )	0
Section	1
Subsection	2
Subsubsection	3
Paragraph	4
Subparagraph	5

Table 2: Heading levels used with the `secnumdepth` counter.

## *Changing the Paper Size*

The Tufte-L<sup>A</sup>T<sub>E</sub>X classes currently only provide three paper sizes: `A4`, `B5`, and `us letter`. To specify a different paper size (and/or margins), use the `\geometrysetup` command in the preamble of your document (or one of the file hooks). The full documentation of the `\geometrysetup` command may be found in the `geometry` package documentation.<sup>9</sup>

<sup>9</sup> `pkg-geometry`

## *Customizing Marginal Material*

Marginal material includes sidenotes, citations, margin notes, and captions. Normally, the justification of the marginal material follows the justification of the body text. If you specify the `justified` document class option, all of the margin material will be fully justified as well. If you don't specify the `justified` option, then the marginal material will be set ragged right.

You can set the justification of the marginal material separately from the body text using the following document class options: `sidenote`, `marginnote`, `caption`, `citation`, and `marginals`. Each option refers to its obviously corresponding marginal material type. The `marginals` option simultaneously sets the justification on all four marginal material types.

Each of the document class options takes one of five justification types:

*justified* Fully justifies the text (sets it flush left and right).

*raggedleft* Sets the text ragged left, regardless of which page it falls on.

*raggedright* Sets the text ragged right, regardless of which page it falls on.

*raggedouter* Sets the text ragged left if it falls on the left-hand (verso) page of the spread and otherwise sets it ragged right. This is useful in conjunction with the `symmetric` document class option.

*auto* If the `justified` document class option was specified, then set the text fully justified; otherwise the text is set ragged right. This is the default justification option if one is not explicitly specified.

For example,

```
\documentclass[symmetric, justified, marginals=raggedouter]{tufte-book}
```

will set the body text of the document to be fully justified and all of the margin material (sidenotes, margin notes, captions, and citations) to be flush against the body text with ragged outer edges.

THE FONT AND STYLE of the marginal material may also be modified using the following commands:

```
\setsidenotefont{\textit{font commands}}
\setcaptionfont{\textit{font commands}}
\setmarginnotefont{\textit{font commands}}
\setcitationfont{\textit{font commands}}
```

The `\setsidenotefont` sets the font and style for sidenotes, the `\setcaptionfont` for captions, the `\setmarginnotefont` for margin notes, and the `\setcitationfont` for citations. The `\textit{font commands}` can contain font size changes (e.g., `\footnotesize`, `\Huge`, etc.), font style changes (e.g., `\sffamily`, `\ttfamily`, `\itshape`, etc.), color changes (e.g., `\color{blue}`), and many other adjustments.

If, for example, you wanted the captions to be set in italic sans serif, you could use:

```
\setcaptionfont{\itshape\sffamily}
```



# *Compatibility Issues*

When switching an existing document from one document class to a Tufte-L<sup>A</sup>T<sub>E</sub>X document class, a few changes to the document may have to be made.

## *Converting from article to tufte-handout*

The following `article` class options are unsupported: `10pt`, `11pt`, `12pt`, `a5paper`, `b5paper`, `executivepaper`, `legalpaper`, `landscape`, `onecolumn`, and `twocolumn`.

The following headings are not supported: `\subsubsection` and `\subparagraph`.

## *Converting from book to tufte-book*

The following `report` class options are unsupported: `10pt`, `11pt`, `12pt`, `a5paper`, `b5paper`, `executivepaper`, `legalpaper`, `landscape`, `onecolumn`, and `twocolumn`.

The following headings are not supported: `\subsubsection` and `\subparagraph`.



# *Troubleshooting and Support*

## *Tufte-L<sup>A</sup>T<sub>E</sub>X Website*

The website for the Tufte-L<sup>A</sup>T<sub>E</sub>X packages is located at <http://code.google.com/p/tufte-latex/>. On our website, you'll find links to our svn repository, mailing lists, bug tracker, and documentation.

## *Tufte-L<sup>A</sup>T<sub>E</sub>X Mailing Lists*

There are two mailing lists for the Tufte-L<sup>A</sup>T<sub>E</sub>X project:

*Discussion list* The tufte-latex discussion list is for asking questions, getting assistance with problems, and help with troubleshooting. Release announcements are also posted to this list. You can subscribe to the tufte-latex discussion list at <http://groups.google.com/group/tufte-latex>.

*Commits list* The tufte-latex-commits list is a read-only mailing list. A message is sent to the list any time the Tufte-L<sup>A</sup>T<sub>E</sub>X code has been updated. If you'd like to keep up with the latest code developments, you may subscribe to this list. You can subscribe to the tufte-latex-commits mailing list at <http://groups.google.com/group/tufte-latex-commits>.

## *Getting Help*

If you've encountered a problem with one of the Tufte-L<sup>A</sup>T<sub>E</sub>X document classes, have a question, or would like to report a bug, please send an email to our mailing list or visit our website.

To help us troubleshoot the problem more quickly, please try to compile your document using the debug class option and send the generated .log file to the mailing list with a brief description of the problem.

## *Errors, Warnings, and Informational Messages*

The following is a list of all of the errors, warnings, and other messages generated by the Tufte-L<sup>A</sup>T<sub>E</sub>X classes and a brief description of their meanings.

**Error:** \subparagraph is undefined by this class.

The \subparagraph command is not defined in the Tufte-L<sup>A</sup>T<sub>E</sub>X document classes. If you'd like to use the \subparagraph command, you'll need to redefine it yourself. See the "Headings" section on page 19 for a description of the heading styles available in the Tufte-L<sup>A</sup>T<sub>E</sub>X document classes.

**Error:** \subsubsection is undefined by this class.

The \subsubsection command is not defined in the Tufte-L<sup>A</sup>T<sub>E</sub>X document classes. If you'd like to use the \subsubsection command, you'll need to redefine it yourself. See the "Headings" section on page 19 for a description of the heading styles available in the Tufte-L<sup>A</sup>T<sub>E</sub>X document classes.

**Error:** You may only call \morefloats twice. See the Tufte-LaTeX documentation for other workarounds.

L<sup>A</sup>T<sub>E</sub>X allocates 18 slots for storing floats. The first time \morefloats is called, it allocates an additional 34 slots. The second time \morefloats is called, it allocates another 26 slots.

The \morefloats command may only be called two times. Calling it a third time will generate this error message. See page 22 for more information.

**Warning:** Option '*<class option>*' is not supported -- ignoring option.

This warning appears when you've tried to use *<class option>* with a Tufte-L<sup>A</sup>T<sub>E</sub>X document class, but *<class option>* isn't supported by the Tufte-L<sup>A</sup>T<sub>E</sub>X document class. In this situation, *<class option>* is ignored.

**Info:** The 'symmetric' option implies 'twoside'

You specified the symmetric document class option. This option automatically forces the twoside option as well. See page 25 for more information on the symmetric class option.

## *Package Dependencies*

The following is a list of packages that the Tufte-L<sup>A</sup>T<sub>E</sub>X document classes rely upon. Packages marked with an asterisk are optional.

- xifthen
- ifpdf\*
- ifxetex\*
- hyperref
- geometry
- ragged2e
- chngpage or changepage
- paralist
- textcase
- soul\*
- letterspace\*
- setspace
- natbib and bibentry
- optparams
- placeins
- mathpazo\*
- helvet\*
- fontenc
- beramono\*
- fancyhdr
- xcolor
- textcomp
- titlesec
- titletoc

