LATEX (& LAX) Typesetting Tips

Version 1.0

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The following are my notes about best practices using LATEX (with or without LYX). I have compiled them primarily for my own reference, but hope that you might find them helpful, too.

Everything was thoroughly tested with the LaTeX packages mentioned below (all versions dating back to May 2015) and LyX 2.1.0 and later, using XeTeX as the output engine¹. Each package was chosen after careful consideration of other options – I decided to add a package only if necessary, and only after I was convinced that it was stable, written by a reputable package author, compatible with other packages, and under active and sustained development.

An up-to-date copy of the present document, together with the configJCW.sty mentioned in Section 3.6 and accompanying LyX math macros file configJCW.lyx (see Section 7.2), are available at https://github.com/JorgWoehl/LaTeXTips.git.

1 Text

1.1 Spaces after dots

Between initials that are followed by a dot use a thin space \, (Option-Shift-Space in LyX). Then use an interword space² _ (Option-Command-Space³) after the last initial – but without adding any additional space after it. If the abbreviation is followed by a non-space character (such as a comma), the interword space is not needed.

J. C. Woehl	J. C. Woehl
J. C. Woehl	J.C.\ Woehl
Smith et al. show	Smith \textit{et al.} show
Smith et al. show	Smith \textit{et al.}\ show

Common abbreviations such as *e.g. or i.e.* are typeset *without any space* between the letters, and are followed by an interword space (unless followed by a punctuation mark):

e.g. the following \textit(e.g.) the following	e.g. the following	<pre>\textit{e.g.} the following</pre>
--	--------------------	--

¹XeTeX is enabled in L_YX by selecting PDF (XeTeX) as Default output format in Document ▷ Settings ▷ Formats. To make use of its extended font capabilities, Use non-TeX fonts (via XeTeX/LuaTeX) needs to be selected under Document ▷ Settings ▷ Fonts.

 $^{^2\}mathrm{An}$ interword space is also sometimes called a control space or normal space.

³On macOS, you may need to deselect the option using the same shortcut (System Preferences ▷ Keyboard ▷ Shortcuts ▷ Input Sources).

$e.g.$ the following \textit{e.g.}\ the following

1.2 Spaces inside word groups

Use a protected (or non-breaking) space ~ (Option-Space), without any space around it, in word groups such as references to named parts of a document⁴, between forenames, between multiple surnames, or wherever words are so closely linked that they should not be separated by a line break.

	Samuel L. Jackson	Samuel~L.\ Jackson
--	-------------------	--------------------

A thin space is – by definition – also non-breaking, so S.\,L.\ Jackson is preferred over S.~L.\ Jackson.

Bartel Lendert van der Waerden	Bartel~Lendert van~der~Waerden
Figure 3	Figure~3

Note that typing out a cross-reference to a figure (or other part of the document) should never be necessary; this is better handled by the package cleveref (see Section 5).

1.3 Dashes

A *single dash* is used for hyphens in a multi-compound word:

my e-mail to a co-worker	my e-mail to a co-worker
--------------------------	--------------------------

A double dash (also called en-dash because it matches the width of the letter n) is used for number ranges or in text:

the July–August issues	the JulyAugust issues
pages 3–17	pages~317
the San Francisco–New York flight	the San FranciscoNew York flight

⁴The package cleveref takes care of cross-references to labels in a document.

A triple dash (also called em-dash because it matches the width of an uppercase M) is used to set off a parenthical statement inside a sentence. The en-dash can also be used for this purpose if it is surrounded by spaces (which I personally prefer):

A flock of sparrows—some of them juveniles—alighted and sang.	A flock of sparrowssome of them juvenilesalighted and sang.
A flock of sparrows – some of them juveniles – alighted and sang.	A flock of sparrows some of them juveniles alighted and sang.

2 Numbers and units

The package siunitx takes care of the correct typesetting and formatting of numbers, units, and physical quantities that involve both. It is loaded by entering

\usepackage{siunitx}

(in Document \triangleright Settings \triangleright LaTeX Preamble when using LyX).

siunitx commands can be used both in text mode or math mode.

When working in LyX, these commands are entered using Insert \triangleright TeX code (Command-L) while in text mode⁵, or directly in math mode. For example, to enter a number followed by a unit, type \SI{ followed by the numerical value, move the cursor outside the closing curly bracket, and enter \{ followed by the unit symbol(s).

Numbers are entered using the \num command and are automatically spaced in groups of three (separated by a thin space) and without commas in the final output:

15 374.553 32	\num{15374.55332}
6.0221413×10^{23}	\num{6.0221413e23}

Angles are entered using the \angle command; the angle sign is followed by the number without space:

12.3°	\ang{12.3}
-------	------------

⁵Raw L^AT_EX commands inserted into the body of a L_YX document are also often referred to as ERT (for evil red text), a term coined on the developers mailing list by Larry Marso in 2000.

Units are entered using the \si command in either an abbreviated format (where a dot signifies multiplication) or a more explicit textual format. siunitx automatically inserts a thin space between the unit symbols:

$\mathrm{kg}\mathrm{m}\mathrm{s}^{-2}$	$\si{kg.m.s}^{-2}$
$\rm kV^2\mu m^{-1}$	\si{\square\kilo\volt\per\um}
$^{\circ}\mathrm{C}$	\si{\celsius}

Numbers followed by units are entered using \SI following the same rules as above. siunitx automatically inserts a thin space between the number and unit:

$c = 299792458 \mathrm{m/s}$	\$c=\SI{299792458}{m/s}\$
$20^{\circ}\mathrm{C}$	\SI{20}{\celsius}
$(1.204 \pm 0.007) \text{Å}$	\sisetup{separate-uncertainty} \SI{1.204(7)}{\angstrom}
$760\mathrm{mmHg}$	\SI{760}{\mmHg}
$8.314\mathrm{Jmol^{-1}K^{-1}}$	\SI{8.314}{\joule\per\mole\per\kelvin}

A vast array of possibilities for switches that alter the output format without changing the input (including rounding) is built into siunitx. In addition, lists and ranges of numbers as well as products and quotients of numbers can be entered directly, and numbers or units can be color-coded.

Because LyX does not natively support siunitx, only the raw LaTeX code is displayed in LyX, which makes reading longer expressions difficult. This display issue can be resolved by defining corresponding LyX math macros for siunitx commands, as described in Section 7.2.

3 Math

The International Organization for Standardization (ISO) has developed a set of conventions for typesetting math in the physical and applied sciences. These recommendations

are in agreement with the conventions specified in the International Union of Pure and Applied Physics (IUPAP) red book and the International Union for Pure and Applied Chemistry (IUPAC) green book. The implementation of these recommendations in LATEX is summarized below.

In what follows it is assumed that the mathtools package is loaded, which is an extension of the amsmath package. In LyX, it can be enabled by choosing Document \triangleright Settings \triangleright Math Options \triangleright mathtools and selecting Load always, or by loading it in the LaTeX Preamble:

\usepackage{mathtools}

In the latter case, Do not load should be selected for Document \triangleright Settings \triangleright Math Options \triangleright mathtools, to prevent possible option clashes that occur when the same package is loaded a second time but with different options⁶.

3.1 Vectors, matrices, and tensors

Unfortunately, even with the mathtools package there are certain math typesetting conventions that LaTeX is unable to cover. For example, physical quantities should be typeset in italic, vectors and matrices in **bold** italic, tensors in **sans-serif bold** italic, while mathematical operators and constants (see Section 3.2) should be typeset in upright font. LaTeX supports these scenarios for Latin characters, but typesets lowercase Greek variables only in italic and uppercase Greek variables only in upright font. The amsmath package provides some uppercase Greek characters in italic (e.g. \varDelta for Δ), but support for boldface Greek symbols is inconsistent.

The unicode-math package provides a fix for these font issues. It can be loaded in the LaTeX Preamble⁷:

\usepackage[math-style=ISO]{unicode-math}

unicode-math uses the Latin Modern Math font by default. Other fonts can be loaded by adding a line to the LaTeX Preamble, such as:

\setmathfont{xits-math.otf}

⁶LγX loads packages that it natively supports before any packages defined in the L⁴T_FX Preamble.

⁷Alternatively, the unicode-math package can be loaded in L_YX by selecting Non-T_EX Fonts Default in the Math field in Document⊳Settings⊳Fonts (the box Use non-TeX fonts (via XeT_EX/LuaT_EX) needs to be checked as well). Options such as math-style=ISO can be passed to unicode-math by entering it in the Custom field under Document Class, or entered in the LaTeX Preamble with \unimathsetup{math-style=ISO}.

If the unicode-math package is loaded in the LaTeX Preamble, the Math field in Document > Settings > Fonts needs be set to Class Default (TeX Fonts), or an option clash error will occur.

A list of currently supported fonts is available on the unicode-math homepage.

$bDeta \Delta$	<pre>\$b D \beta \Delta\$</pre>
$\mathrm{b}\mathrm{D}eta\Delta$	<pre>\$\symbfup{b D \beta \Delta}\$</pre>
bDβΔ	<pre>\$\symbfsfit{b D \beta \Delta}\$</pre>
$\mathrm{b}\mathrm{D}\beta\Delta$	<pre>\$\symup{b D \beta \Delta}\$</pre>

For consistency, it is suggested to define the following semantic markup commands in the LaTeX Preamble,

```
\newcommand*{\vect}[1]{\ensuremath{\symbf{#1}}}
\newcommand*{\matr}[1]{\ensuremath{\symbf{#1}}}
\newcommand*{\tens}[1]{\ensuremath{\symbfsfit{#1}}}
```

and use these new commands instead of directly changing font specifications. Adding the \ensuremath command ensures that the markup can be used in both text mode and math mode. Vectors can also be entered using a top arrow (\vec) in LyX; they can be automatically converted to the new notation by adding the following to the LaTeX Preamble:

```
\AtBeginDocument{
  \renewcommand{\vec}{\vect}}
```

The \AtBeginDocument command ensures that the redefinition happens at the beginning of the document so that other packages cannot tamper with it.

```
\begin{array}{lll} \mathrm{vector} \ E & \mathrm{vector} \ \$ \mathrm{vect} \ \$ & \mathrm{vect} \ \$ \mathrm
```

Although the fonts may not be properly displayed in LyX itself, they will appear correctly in the final output. Note that display issues in LyX can be overcome by defining (protected) LyX math macros as described in Section 7.2.

Also note that unicode-math cannot be used with pdfLaTex, which is the default TEX engine in modern LaTeX 2_{ε} distributions; however, it runs fine with XeTeX or LuaTeX, which are also included in these distributions.

3.2 Mathematical constants and operators

Mathematical constants (such as Euler's number e, the imaginary unit i, or the number π) and mathematical operators (such as the differential operator d, the partial differential operator ∂ , or the difference operator Δ) are typeset in upright font. LaTeX respects this convention for operators that are entered as commands:

```
sin x $\sin x$
sin x $\sin x$
```

Also, some special symbols such as the $\nb \nabla$ operator are typeset correctly, but this is not the case for other mathematical constants and operators.

The best way to deal with this situation is to define the semantic markup \const{} and use shortcuts like \ee or \ii for frequently used mathematical constants:

```
\newcommand*{\const}[1] {\ensuremath{\symup{#1}}}
\newcommand{\ee}{\const{e}}
\newcommand{\ii}{\const{i}}
```

The Greek letter π almost always refers to the mathematical constant π and can therefore simply be redefined globally (at the beginning of the document). In order to avoid an infinite recursive loop, the old definition must be assigned to a new command first:

```
\AtBeginDocument{
  \let\oldpi\pi
  \renewcommand{\pi}{\const{\oldpi}}
}
```

Note that the two lines inside the \AtBeginDocument environment can simply be added to an existing \AtBeginDocument environment.

For differentials and difference operators we proceed similarly:

```
\newcommand*{\oper}[1]{\ensuremath{\mathop{}\!\symup{#1}}}
\newcommand{\dd}{\oper{d}}
\newcommand{\pd}{\oper{\partial}}
\newcommand{\Dd}{\oper{\Delta}}
```

The empty \mbox{mathop} command and negative space $\$! is used to provide the correct spacing before the operator signs. This definition distinguishes dx from d times x and automatically leads to the correct spacing in all contexts in which these operators may

be used (which makes it, for example, unnecessary to insert *thin spaces* \, before differentials when used in math mode).

3.3 Extensible parentheses

If a mathematical expression is enclosed in parentheses, use extensible parentheses to accommodate for different vertical space needs. In LyX, extensible parentheses are entered by clicking on () or typing Control-M (.

Extensible parentheses should *always* be used around values for physical quantities (except when they appear alone) to make the equations easier to read:

However, TEX adds additional space around extensible parentheses, which is not always welcome:

$$f\left(x\right) \qquad \qquad \$f \left(x \right) \$$$

$$f\left(x\right) \qquad \qquad \$f\left(x\right) \$$$

Therefore, avoid using extensible parentheses when they enclose the argument of a function or operator, such as in the function f(x), differential d(xy), derivative $\frac{d}{dx}(xy)$, or difference $\Delta(xy)$. If extensible parentheses are necessary to accommodate the argument, insert a *negative thin space* \! before them to cancel the extra space (in LyX, just type \! or use the space popup in the math toolbar).

$\mathrm{d}(\sum x_i)$	<pre>\$\displaystyle \dd (\sum x_i)\$</pre>
$\mathrm{d}\left(\sum x_i\right)$	<pre>\$\displaystyle \dd \left(\sum x_i \right)\$</pre>
$\mathrm{d}\!\left(\sum x_i\right)$	<pre>\$\displaystyle \dd \! \left(\sum x_i \right)\$</pre>

3.4 Multiplication sign

The multiplication operator \times (type \times in LyX) should be used for all multiplications involving *numerical values* in order to avoid potential confusion with the decimal point. The package siunitx (Section 2) does this automatically when multi-part numbers or quantities are entered.

Everywhere else the centered dot \cdot (type \cdot in LyX) can be used if so desired, such as between parentheses or between symbolic quantities.

3.5 Text in math mode

Text in math mode that appears in a *subscript or superscipt* is entered using the \textnormal command. However, it is recommended to use the \text command for all other text in math mode, because it adapts to the surrounding text environment by using the same font. Both commands require amsmath (which is automatically loaded by the mathtools package).

```
V_{\rm tot} $$V_{\rm mal}{tot}$$ pV = nRT \qquad {\rm (ideal\ gas)} $$pV=nRT \neq {\rm (ideal\ gas)}$$
```

Subscripts and superscripts are typeset using **\textnormal** if they are **descriptive** (representing the name of a person or a particle), but remain italic if they represent a **variable or quantity**:

⁸This is preferred over \mathrm or \textrm. \mathrm uses math roman font, but uses math spacing (ignoring spaces) and interprets dashes as minus signs, while \textrm uses roman font that adjusts to the text environment (which would lead to italic sub/superscripts in a theorem environment).

```
Boltzmann's constant, k_{\rm B} (name of a person) mass of an electron, m_{\rm e} (name of a particle) heat capacity at constant pressure, C_p (quantity)
```

3.6 Other LATEX tips

Eqnarray

Avoid using the equarray environment, which is very buggy. Use the AMS align environment instead (Insert \triangleright Math \triangleright AMS align environment in LyX).

Avogadro's Number

Insert a negative space \setminus ! into the subscript of Avogadro's number $N_{\rm A}$ (if the negative space is put directly after the N, it has the same effect on the subscript, but potential superscripts will now be drawn too close to it):

$N_{ m A}$	<pre>\$N_\textnormal{A}\$</pre>
$N_{ m A}$	<pre>\$N_\textnormal{\!A}\$</pre>

Definitions

```
a\stackrel{	ext{\tiny def}}{=} b $a \eqdef b$
```

LaTeX Preamble

In order to avoid a messy preamble, put configuration-related commands in a file ${\tt config.sty}$ and call it from the LaTeX Preamble with

\usepackage{config}

Follow the instructions in Section 6.3 to add this package to your TFX system.

A configJCW.sty for all recommendations contained in this document is available at https://github.com/JorgWoehl/LaTeXTips.git.

4 Chemistry

Typesetting chemical formulas and reaction equations is done with the package mhchem.

Although this package can be selected directly using Document \triangleright Settings \triangleright Math Options in LyX, it loads by default with the older version 3 format and without any options. As there seems to be no way to change the options of packages loaded natively by LyX, it is suggested to select Do not load and use the following code in Document \triangleright Settings \triangleright LaTeX Preamble instead (which also uses prettier arrows rather than those from the current math font⁹):

\usepackage[version=4,arrows=pgf-filled]{mhchem}

The mhchem commands are entered in LyX as TeX code (Command-L) when in text mode; they can be typed in directly in math mode.

⁹The layout option for stacked superscripts and subscripts is not recognized by mhchem v3.21, even though it is officially referenced in the documentation. This is working correctly in v4.08. (Note that the layout option should be avoided anyhow as it does not conform to IUPAC conventions.)

```
V_{
m H_2O} $V_{\ce{H2O}}$
```

```
A\cdots B = C = D \equiv E \\ \text{$\setminus$ ce{A \setminus bond{...}B \setminus bond{~-}C=D\#E}$}
```

```
a\,{\bf A} + b\,{\bf B} \longrightarrow c\,{\bf C} + d\,{\bf D} \qquad \Delta_{\bf f} H^\circ < 0 \ce{\sa\A + \sb\B -> \sc\C + \sd\D \quad \\Dd_{\text{f}} H^\circ<0\}
```

5 Cross-references

Cross-references to figures, tables, and parts of a document are best done using the package **cleveref**. It automatically determines the type of cross-reference and the context in which it is used, and can even typeset lists of cross-references.

cleveref is designed to work with the hyperref package (which turns cross-references into clickable hyperlinks in the pdf output), but cleveref must be loaded last. The documentation even states that cleveref should be loaded after all other packages that don't specifically support it.

\usepackage[noabbrev,capitalize]{cleveref}

This loads the package with options that prevent abbreviations like eq. or fig. and capitalizes all occurrences (Equation, Figure). The hyperref package can be loaded in L χ X by checking User Hyperref Support in Document \triangleright Settings \triangleright PDF Properties; it can also be loaded using

\usepackage{hyperref}

in the LaTeX Preamble (before cleveref is loaded).

LyX normally uses prettyref or refstyle for cross-references, and does not natively support cleveref. Fortunately, there is a simple workaround: enter all cross-references as usual using LyX's built-in functionality by selecting the format <reference>, and convert these \ref commands into \cref commands during the compile phase (but before hyperref goes to work). This can be achieved by adding the following lines to the end of the LaTeX Preamble (right after the cleveref package is loaded):

```
\AtBeginDocument{
  \renewcommand{\ref}{\cref}
}
```

Section 1 \ref{sec:Typesetting-text}

Footnote 4 \ref{fn:Cross-references-to-labels}

Cross-references containing more than one label are entered as TeX code (Command-L):

\crefrange{fig:PoissA}{fig:PoissB}

\cref{fig:PoissA,fig:PoissE}

6 Other packages

6.1 minted

To use the minted package with LyX, the source file must be compiled with the -shell-escape flag. Starting with LyX 2.3.0, this is done by simply checking Allow running external programs in Document > Settings > Formats for the source file in question. The first time the source file is compiled, a warning dialog will be displayed, where the option is confirmed by clicking the Always allow for this document button.

In older versions of L_YX , the compile option has to be enabled globally, which can be achieved by selecting the proper converter in $L_YX \triangleright Preferences \triangleright File\ Handling \triangleright Converters$ and adding the -shellescape flag to the Converter string, e.g.

xelatex -shell-escape \$\$i

Click on Modify and Save to apply the change. The converter in use can be determined by clicking on View Complete Log when a TEX error is generated after minted is used for the first time. For example, if the log starts with "This is XeTeX" you have to add the shell-escape flag to the xelatex converter (click on the LaTeX (XeTeX) -> PDF (XeTeX) entry).

minted requires additional software, Pygments, which can be installed using the Python package manager on macOS. At the command line prompt, type

sudo easy_install Pygments

Alternatively, Pygments can also be installed using MacPorts. At the command line prompt, type

```
port search pygments
```

and choose the pygments version with the highest number (e.g. py34-pygments). Install it with

```
sudo port install py34-pygments
```

and create a soft link from pygmentize (use sudo find / -name pygmentize if necessary) to the /usr/local/bin folder so that it is on the search path:

```
sudo ln -s /opt/local/Library/Frameworks/Python.framework/(cont...)
(...)Versions/3.4/bin/pygmentize /usr/local/bin/pygmentize
```

6.2 microtype

The microtype package provides "subliminal refinements towards typographical perfection".

6.3 Add your own package

Write your own package using the following format:

```
\NeedsTeXFormat{LaTeX2e}
\ProvidesPackage{mypackage}
% Your new commands here.
% Load packages with
% \RequirePackage[options]{package}
% instead of
% \usepackage[options]{package}
\endinput
```

If you are on macOS, put a symbolic link in the folder ~/Library/texmf/tex/latex/ (create the texmf folder and all subfolders if they do not yet exist) that points to your package file:

```
sudo ln -s /path/to/mypackage.sty ~/Library/texmf/tex/latex/mypackage.sty
```

Follow a similar procedure if you are on Windows or Linux.

Note: Before defining a new command, look up the command name in the Comprehensive LaTeX Symbol List to make sure that it is still available.

7 LyX tricks

7.1 LaTeX vs. LaTeX

If you want to render the text "LaTeX" as "LaTeX" instead of "LATeX" (which LyX does automatically), simply put it inside a TeX code box (Command-L). This works for other text logos as well.

7.2 Displaying math macros in LyX

To display math marcos in LyX that it does not natively support (for example those that were added through packages or in your own LaTeX Preamble), insert a comment 10 at the beginning of your document (Insert \triangleright Note \triangleright Comment). Inside this comment, insert one or more math macros via Insert \triangleright Math \triangleright Macro. The LyX macro has three fields: Name, TeX, and LyX. In the Name field, enter the name of the math macro you want to add support for. Leave the TeX field empty, as the math macro is already defined elsewhere. In the LyX field, use a graphical representation that mimics how the macro will look like in the final output. Arguments are entered in the LyX field only, by typing \#1 (with a backslash) for argument 1, and so on; they are automatically added to the Name part.

A LyX macros file configJCW.lyx for all commands recommended in this document is available at https://github.com/JorgWoehl/LaTeXTips.git.

In order to use the math macro in LyX, simply type the LaTeX command in math mode and hit the spacebar, at which point one or more boxes will appear for entering the arguments. The cursor will be automatically placed in the first argument box; to jump to the next argument box, use the right arrow or tab key.

7.3 Hyperref options

Options for the hyperref package (such as urlcolor=blue) can be added by entering them in the Additional options field in Document > Settings > PDF Properties. In the Hyperlinks tab, you should check the options No frames around links and Color links.

¹⁰By putting the macro inside a comment, the L_YX code that it generates gets ignored and does not interfere with the macro definition in the package or the preamble.