THE PUBLIC IS MORE FAMILIAR WITH BAD DESIGN THAN GOOD DESIGN. IT IS, IN EFFECT, CONDITIONED TO PREFER BAD DESIGN, BECAUSE THAT IS WHAT IT LIVES WITH. THE NEW BECOMES THREATENING, THE OLD REASSURING.

PAUL RAND, "DESIGN, FORM, AND CHAOS"

IN ANYTHING AT ALL, PERFECTION IS FINALLY ATTAINED NOT WHEN THERE IS NO LONGER ANYTHING TO ADD, BUT WHEN THERE IS NO LONGER ANYTHING TO TAKE AWAY, WHEN A BODY HAS BEEN STRIPPED DOWN TO ITS NAKEDNESS.

ANTOINE DE SAINT-EXUPÉRY. "TERRE DES HOMMES"

...THE DESIGNER OF A NEW SYSTEM MUST NOT ONLY BE THE IMPLEMENTOR
AND THE FIRST LARGE-SCALE USER; THE DESIGNER SHOULD ALSO WRITE THE
FIRST USER MANUAL. ...IF I HAD NOT PARTICIPATED FULLY IN ALL THESE ACTIVITIES, LITERALLY HUNDREDS OF IMPROVEMENTS WOULD NEVER HAVE BEEN
MADE, BECAUSE I WOULD NEVER HAVE THOUGHT OF THEM OR PERCEIVED
WHY THEY WERE IMPORTANT.

DONALD E. KNUTH, "THE ERRORS OF TEX"

# THE TUFTE-LATEX DEVELOPERS

# A TUFTE-STYLE BOOK

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https://github.com/mormonjesus69420/modernized-tufte-latex

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First printing, March 2025

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Dedicated to those who appreciate LETEX and the work of Edward R. Tufte and Donald E. Knuth.

# Introduction

This sample book discusses the design of Edward Tufte's books¹ and the use of the tufte-book and tufte-handout document classes.

Additionally, it discusses changes made to the original Tufte-LATEX document classes in attempt to modernize them. It also shows how to use the new features of the Tufte-LATEX document classes. I want to say up front that I am neither a typographer nor a designer, this is my amateur attempt at making this project more accessible. After years of last official update to the Tufte-LATEX project, it has become a bit outdated and harder to use on modern systems.

I freely admit that some of the changes made here are not in the spirit of the original Tufte-LATEX project. I have tried to keep the changes as minimal as possible, and provide a way to turn them off if desired. These changes were motivated by my personal needs to make it more accessible to me, and I hope they will be useful to others as well.

¹ Tufte 1990, 1997, 2001, 2006.

# The Design of Tufte's Books

THE PAGES of a book are usually divided into three major sections: the front matter (also called preliminary matter, or prelim), the main matter (the core text of the book), and the back matter (or end matter).

THE FRONT MATTER of a book refers to all of the material that comes before the main text. The following table from shows a list of material that appears in the front matter of: *The Visual Display of Quantitative Information, Envisioning Information, Visual Explanations*, and *Beautiful Evidence* along with its corresponding page number. Page numbers that appear in parentheses refer to folios that do not have a printed page number (but they are still counted in the page number sequence).

	Books			
Page content	VDQI	ΕI	VE	BE
Blank half title page	(1)	(1)	(1)	(1)
Frontispiece <sup>2</sup>	(2)	(2)	(2)	(2)
Full title page	(3)	(3)	(3)	(3)
Copyright page	(4)	(4)	(4)	(4)
Contents	(5)	(5)	(5)	(5)
Blank page	_	(6)	(6)	(6)
Dedication	(6)	(7)	(7)	7
Blank page	_	(8)	_	(8)
Epigraph	-	_	(8)	-
Introduction	(7)	(9)	(9)	9

Table 1: Overview of pages in front matter of Tufte's books. Page numbers in parentheses refer to folios without printed page numbers.

The design of the front matter in Tufte's books varies slightly from the traditional design of front matter. First, the pages in front matter are traditionally numbered with lowercase roman numerals (e.g., i, iv, ix, xiv, ...). Second, the front matter page numbering sequence is usually separate from the main matter page numbering. That is, the page numbers restart at 1 when the main matter begins. In contrast, Tufte has enumerated his pages with arabic numerals, and share the count sequence with the main matter.

There are also some variations in design across Tufte's four books. The page opposite the full title page (labeled "frontispiece" in table 1)

<sup>&</sup>lt;sup>2</sup> The contents of this page vary from book to book. In *VDQI* this page is blank; in *EI* and *VE* this page holds a frontispiece; and in *BE* this page contains three epigraphs.

has different content in every book. In *The Visual Display of Quantitative Information*, this page is blank; in *Envisioning Information*, and *Visual Explanations*, this page holds a frontispiece; and in *Beautiful Evidence*, this page contains three epigraphs.

The dedication appears on page 6 in *VDQI* (opposite the introduction), and is placed on its own spread in the other books. In *VE*, an epigraph shares the spread with the opening page of the introduction.

None of the page numbers (folios) of the front matter are expressed except in *BE*, where the folios start to appear on the dedication page. This book follows the style of *BE*, with folios on dedication and introduction pages. If that's not desired, use the "\thispagestyle{empty}" command on the dedication and introduction pages.

THE FULL TITLE PAGE of each of the books varies slightly in design. In all the books, the author's name appears at the top of the page, the title it set just above the center line, and the publisher is printed along the bottom margin. Some of the differences are outlined in the following table:

Feature	VDQI	EI	VE	BE
Author				
Typeface	serif	serif	serif	sans serif
Style	italics	italics	italics	upright, caps
Size	24 pt	20 pt	20 pt	20 pt
Title				
Typeface	serif	serif	serif	sans serif
Style	upright	italics	upright	upright, caps
Size	36 pt	48 pt	48 pt	36 pt
Subtitle				
Typeface	_	_	serif	_
Style	_	_	upright	_
Size	_	_	20 pt	_
Edition				
Typeface	sans serif	_	_	_
Style	upright, caps	_	_	_
Size	14 pt	_	_	_
Publisher				
Typeface	serif	serif	serif	sans serif
Style	italics	italics	italics	upright, caps
Size	14 pt	14 pt	14 pt	14 pt

Table 2: Comparison of full title page design features in Tufte's books.

THE TABLES OF CONTENTS in Tufte's books give first glimpse of the structure of the main matter. *The Visual Display of Quantitative Information* is split into two parts, each containing some number of chapters. His other three books only contain chapters—they're not broken into parts.

The following pages show examples of all four books' title pages and tables of contents. As you can see this sample document does its best to mimic the design of *Beautiful Evidence*, but it's not perfect. The main difference is caused by the fact that the fonts used in it are not freely available, and Tufte-LATEX uses substitutes.

Edward R. Tufte

The Visual Display of Quantitative Information

SECOND EDITION

Graphics Press · Cheshire, Connecticut

Edward R. Tufte

Envisioning Information

Graphics Press · Cheshire, Connecticut

Edward R. Tufte

# Visual Explanations

Images and Quantities, Evidence and Narrative

Graphics Press · Cheshire, Connecticut

EDWARD R. TUFTE

**BEAUTIFUL EVIDENCE** 

GRAPHICS PRESS LLC

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# **Typefaces**

TUFTE'S BOOKS PRIMARILY USE TWO TYPEFACES: Bembo and Gill Sans. Bembo is used for the headings and body text, while Gill Sans is used for the title page and opening epigraphs in Beautiful Evidence.

Older versions of Tufte-LATEX used Palatino, Helvetica, and Bera Mono fonts. This version of Tufte-LATEX uses ETDD for a Bembo-like font, mathpazo for Palatino math font, gillius for a Gill Sans-like font, and FiraMono as a monospaced font.

However this sample book overrides the default FiraMono it with RecursiveMono font. It uses the provided custom-tufte-common.tex file hook to override the default font. I have done that because I like the Recursive Mono font better. Sadly Recursive font is not available on CTAN, therefore I have used FiraMono as a default font. If you wish to use Recursive font, you can use font files provided in this package in the fonts directory.

While Tufte-LATEX class tries to make documents compiled with XHETEX, LualETEX, and pdf LETEX look as similar as possible, it's impossible to make them look identical. There seem to be small differences between how the engines typeset text, encode fonts, and while pdf LATEX uses fontspec, the other use fontenc.

LATEX size	Font size	Leading	Used for
\tiny	5	6	sidenote numbers
\scriptsize	7	8	_
\footnotesize	8	10	sidenotes, captions
\small	9	12	quote, quotation, and verse environments
\normalsize	10	14	body text
\large	11	15	B-heads
\Large	12	16	A-heads, TOC entries, author, date
\LARGE	14	18	handout title
\huge	20	30	chapter heads
\Huge	24	36	part titles

Table 3: A list of LATEX font sizes as defined by the Tufte-LATEX document

# Headings

TUFTE'S BOOKS INCLUDE THE FOLLOWING HEADING LEVELS: \parts, \chapters, \sections, \subsections, and \paragraphs. By default \subsubsection and \subparagraph headings are not defined in the Tufte-LATEX classes. 4

Heading	Style	Size
Part	roman	24/36×40 pc
Chapter	italic	20/30×40 pc
Section	italic	12/16×26 pc
Subsection	italic	11/15×26 pc
Paragraph	italic	10/14

Table 4: Heading styles used in Beautiful Evidence.

<sup>&</sup>lt;sup>3</sup> Parts and chapters are defined for the tufte-book class only.

<sup>&</sup>lt;sup>4</sup> For more information on this topic, see (Bringhurst 2005), section 4.2.2

Paragraph The \paragraph headings (as shown here) are introduced by italicized text and separated from the main paragraph by a bit of space.

# Environments

The following table lists characteristics defined for the various environments:

Environment	Font size	Notes
Body text Block quote Sidenotes Captions	10/14×26 pc 9/12×24 pc 8/10×12 pc 8/10×12 pc	Block indent (left and right) by 1 pc Sidenote number is set inline, followed by word space

Table 5: Environment styles used in *Beautiful Evidence*.

# On the Use of the tufte-book Document Class

The Tufte-LATEX 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-LATEX 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. This class does not provide pre-defined styles for \subsubsection or \subparagraph. As Bringhurst points out in "The Elements of Typographic Style",5 you should "use as many levels of headings as you need: no more, and no fewer".

The Tufte-LATEX classes will emit an error if you try to use \subsubsection or \subparagraph.

IN HIS LATER BOOKS, <sup>6</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 style, use the \newthought command

\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. The wide margin on the right side provides ample room for sidenotes and small figures. Any \footnote will automatically be converted into a \sidenote.<sup>7</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.

In his books Tufte places margin on the right side of the page, regardless whether it's an even or odd page. If you prefer to alternate the placement of margins, so they fall on outer edge you can use the symmetric class option.

5 Bringhurst 2005.

<sup>6</sup> Tufte 2006.

<sup>7</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.

On a personal note, placing of sidenotes—be it footnote, citation, or other—should follow the following rules:

- If the sidenote applies to the whole sentence, it should be placed after the period or other punctuation mark.
- If the sidenote applies to a specific word, it should be placed immediately after that word, even if the word is in the middle of the sentence, or followed by a punctuation mark.
- If a sidenote is a complete sentence, or a citation, it should end with a period.

The specification of the \sidenote command is:

Both the  $\langle number \rangle$  and  $\langle offset \rangle$  arguments are optional. If you provide a  $\langle number \rangle$  argument, then that number will be used as the sidenote number. It will only change the number of the current sidenote, 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  $\langle \textit{offset} \rangle$  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 pull the sidenote up the page.

While both the  $\langle number \rangle$  and  $\langle offset \rangle$  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[][\langle offset \rangle]{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  $\langle offset \rangle$  argument:

The \marginnote command has a similar offset argument:

```
\mbox{\mbox{marginnote}[$\langle offset \rangle]{Margin note text.}}
```

# References

References are placed alongside their citations as sidenotes, as well. This can be accomplished using the normal \cite command or the \autocite command, which functions similarly.<sup>8</sup>

You will need to specify a bibliography resource file in the preamble of your document using \addbibresource{bibliography-file.bib} command. The complete list of references may be printed automatically by using the \printbibliography command. See the end of this document

<sup>&</sup>lt;sup>8</sup> If you use the \cite command within a sidenote, it will render as an in-line parenthetical citation, as demonstrated here (Tufte 2001).

for an example, and the BibLATEX documentation for more information. Bibliography can be turned off with the help of nobib class option.

To enter multiple citations at one location,<sup>9</sup> you can provide a list of keys separated by commas:

9 Tufte 1990, 2006.

```
\cite{bibkey1,bibkey2,...}
```

IN THE NEW VERSION OF TUFTE-LATEX, it's impossible to offset citation's position the same way sidenotes can be moved up or down the margin. This is caused by the change from natbib package and BIBTEX tool to biblatex package and biber tool. The biblatex provides it own optional arguments for the \cite commands, which are kept unchanged to avoid confusion. I see the possible breakage of old Tufte-LATEX documents as a fair tradeoff for the new features and flexibility that biblatex provides. It is worth noting that the natbib is mostly kept on life support, so it's better to switch now and make Tufte-LATEX more maintainable in the future. This is one of the reasons why this version of Tufte-LATEX classes has a new major version number.

# 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{margin-figure}
\caption{Margin figure caption}%
\label{fig:margin-figure-label}
\end{marginfigure}
```

The marginfigure and margintable environments accept an optional parameter  $\langle \textit{offset} \rangle$  that adjusts the vertical position of the figure or table. See the "Sidenotes" section above for examples of how to use offsets. The specifications are:

```
\label{lem:continuous} $$ \left( offset \right) = 0.$$ end{marginfigure} $$ \left( offset \right) = 0.$$ end{margintable} $$ \left( offset \right) = 0.$$ end{margintable} $$
```

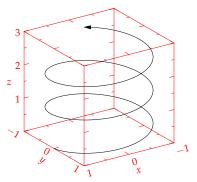
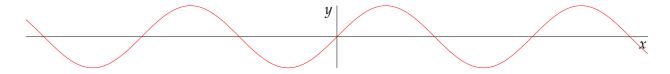


Figure 1: This is a margin figure. The helix is defined by  $x = \cos(2\pi z)$ ,  $y = \sin(2\pi z)$ , and z = [0, 2.7]. The figure was drawn using Asymptote (http://asymptote.sf.net/).

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



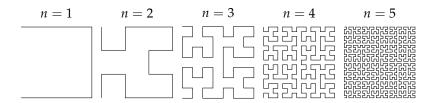


Figure 2: This graph shows  $y = \sin x$  from about x = [-10, 10]. Notice that this figure takes up the full page width.

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 require vertical adjustment. The \caption command can take a second optional argument which enables you to do this by providing a dimension  $\langle \textit{offset} \rangle$ . You may specify the caption in any one of the following forms:

```
\caption{long caption}
\caption[short caption] {long caption}
\caption[] [\langle offset \rangle ] {long caption}
\caption[short caption] [\langle offset \rangle ] {long caption}
```

A positive *(offset)* 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 *(short caption)* and *(offset)* are both optional, they must be provided in order. Thus, to specify an *(offset)* without specifying a *(short caption)*, 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...][1em]{Hilbert curves...}

CAPTION OFFSET IS UNAVAILABLE for marginfigure and margintable environments. In these cases you need to offset the whole figure or table. Captions in marginfigure and margintable still support short captions.

TUFTE STYLE TABLES ARE SIMPLE and should be styled with the booktabs package. Table 6 shows table created with the booktabs package. Notice the lack of vertical rules—they serve only to clutter the table's data. Hence Tufte style tables use only horizontal rules. In cases where a table has many rows, colortbl can be used to make rows stand out visually from each other. Colors can be used to group related rows, highlight important data, or make one row stand out from the others.

Length
81/2 inches
11 inches
61/2 inches
3/8 inches
2 inches

Table 6: Here are the dimensions of the various margins used in the Tufte-

#### Too Many Floats

Occasionally LaTeX will generate an error message:

Error: Too many unprocessed floats

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.), LATEX may run out of "slots" to keep track of them and will generate the aforementioned error.

LATEX initially allocates 18 slots for storing floats. To work around this limitation, the Tufte-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:

```
You may only call \morefloats twice
See the Tufte-LaTeX documentation for alternatives
```

This is because allocating more floats may lead LATEX to 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

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. Keep in mind that each sidenote actually uses two float slots.

After placing the floats, LATEX 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 LATEX's floats works, it's hard to know for sure where it decided

to put the float. Therefore, the Tufte-LATEX document classes provide commands to override the caption position.

Vertical alignment In cases where the caption is too high or too low on the page, you can adjust its vertical position. To override the caption's vertical alignment, use the provided \setfloatalignment command inside the float environment. For example:

```
\begin{figure}
  \includegraphics{vertical-figure}
  \caption{vertical-figure-caption}%
  \label{fig:vertical-figure-label}
  \setfloatalignment{b} % forces caption to be bottom-aligned
\end{figure}
```

The syntax of the \setfloatalignment command is:

```
\strut \strut
```

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

Horizontal alignment To override the horizontal alignment, use either the \forceversofloat or the \forcevertofloat command inside of the float environment. Note that these commands only work when the symmetric option is enabled. For example:

```
\begin{figure}
  \includegraphics{horizontal-figure}
  \caption{horizontal-figure-caption}%
  \label{fig:horizontal-figure-label}
  \forceversofloat % forces caption 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 \forcerectofloat 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. This environment stretches across the main text block and the sidenotes area.

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

Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Ut purus elit, vestibulum ut, placerat ac, adipiscing vitae, felis. Curabitur dictum gravida mauris. Nam arcu libero, nonummy eget, consectetuer 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

When using XIMTEX or LualATEX, the Tufte-LATEX classes will load the fontspec package. This package allows you to set the typeface to any installed font, any local font files, or to any font files you have installed in your TEXMF tree.

By default the Tufte-LATEX classes will use the ET-Bembo font from the ETbb package, as the main typeface. If it's unavailable, the TEX Gyre Pagella from the tex-gyre-pagella package will be used as fallback serif font. For math fonts it tries to use the Palatino font from the mathpazo package. For sans serif text the Gillius No. 2 font from the gillius package will be used. If this one is unavailable, the TEX Gyre Heros font from the tex-gyre-heros package will be used. In case of monospaced text the Fira Mono font from the FiraMono package will be used. If it's not present, the TEX Gyre Cursor font from the tex-gyre-cursor package will be used. However the provided custom-tufte-common.tex file hook overrides the default monospaced font with RecursiveMono font. This file shows how you can override the default fonts, and how the file hooks can be used.

The TEX Gyre faces are usually included with TEX Live distributions, hence why they are used as fallback fonts. If any of the selected fonts don't suit you, you can easily change them using the fontspec package.

WHEN USING THE pdfLATEX engine, the Tufte-LATEX classes will try to use the same default fonts, but will fall back to the default Computer Modern fonts if they are unavailable. The fontspec package is not available under pdfLATEX, so it uses the fontenc package to set the font encoding. This package doesn't make it easy to use non-standard fonts, so it's recommended to use XALATEX or LualATEX for the best results. Alternatively install and use font packages that are compatible with pdfLATEX.

In cases where nofonts option is used, the Tufte-LATEX classes will not load any fonts. In pdfLATEX will not load the fontenc package. In other engines nols option must also be used to disable loading of fontspec package. More info in following subsection.

#### 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 commands, the letterspacing—that is, the spacing between the letters—should be increased slightly. The \altalcaps command was modified with proper letterspacing for strings of FULL CAPITAL LETTERS, and the \smallcaps command was modified with spacing for SMALL CAPITAL LETTERS. These commands will also automatically convert the case of the text to upper—or lowercase, respectively. You can see that in the source code of this document.

<sup>10</sup> Bringhurst 2005.

The \textsc command has also been redefined to include proper letterspacing. However, the case of the \textsc argument is left as is. This allows one to use both uppercase and lowercase letters: The Initial Letters Of The Words In This Sentence Are Capitalized.

# Document Class Options

The tufte-book class is based on the LATEX book document class. Conversely the tufte-handout class is based on the article document class. Therefore, you can pass any of the typical book or article options to them. Tufte-LATEX offers a few additional options that are specific to the tufte-book and tufte-handout document classes. Besides the nomoderntitles options, which is only applicable to the tufte-handout class, all other options are available for both classes.

### Paper Size and Layout Options

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

The b5paper option will set the paper size to B5 instead of the default us letter size.

The a5paper, executive paper, and legalpaper options are unavailable in the Tufte-LATEX classes.

The twoside option will modify the running heads so that the page number is printed on the outside edge. In other words it will be placed on the right side of the odd pages, and on the left side of the even pages. When it comes to books, the head on the left side will also contain book title, and right side will contain chapter title. While in case of the handouts the left side head will use the author name, and right side will use the handout title. By default the Tufte-LATEX classes use the twoside option, as Tufte's BE book has done. 11 If you wish to disable it you can use the oneside option on a case by case basis.

The symmetric option typesets the sidenotes on the outside edge of the page, same way the twoside option does for the heads. This is the way books are traditionally printed, but Tufte's book design places the sidenotes on the right side of every page. This option implicitly sets the twoside option.

The landscape, one column, and two column options are not available in the Tufte-LATEX classes.

## Font and Text Options

The sftitle option will set the title page or block in a sans serif type-face. The nosftitle option will set the title page or block in a serif type-face. In case of tufte-handout these options also affect the abstract while in tufte-book they affect the epigraphs. By default the tufte-book class uses sftitle and the tufte-handout class uses nosftitle.

The sfmarginals option makes all marginal material use sans serif typeface instead of the default serif typeface.

11 Tufte 2006.

The justified option fully justifies the main text (flush left and right). By default the text is ragged right, just as the body text of Tufte's books is ragged right. This prevents needless hyphenation and makes it easier to read the text in the slightly narrower column.

The 10pt, 11pt, and 12pt options are unavailable in the Tufte-LATEX classes.

The nofonts option prevents the Tufte-LATEX classes from automatically loading the Tufte typefaces. You should use this option if you wish to load your own fonts in pdf LATEX. If you're using XHLATEX or LuaLTEX, you can use fontspec to set fonts, so this option is not necessary, but is available if you wish to use it. If you aren't using the nols option, the fontspec package will still be loaded as it is required for letterspacing.

The nols option inhibits loading the code that modifies the letterspacing. The Tufte-LATEX classes try to load the appropriate letterspacing package to adjust spacing of letters in all-caps environments. It uses letterspace or the soul under pdf LTEX. In case of XTEX and LuaLTEX it uses fontspec.

The bidi option loads the bidi package which is used with XHATEX 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. Hence this option exists to load it in the class file.

#### Title Page Options

The notitlepage option causes \maketitle to generate a title block instead of a title page. While the analogous titlepage option causes \maketitle to generate a full title page. By default the tufte-book class uses titlepage option and the tufte-handout class uses the notitlepage.

#### Toggle Options

The nobib option inhibits loading of the natbib and bibtex packages and modifying the \cite command.

The notoc option suppresses Tufte-LATEX's custom table of contents (TOC) design. The current TOC design only shows unnumbered chapter titles in books; it doesn't show sections or subsections. The notoc option will revert to LATEX'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.

The nonotes option inhibits loading packages used for ShadedNote and FramedNote environments. By default it loads the amsthm, cleveref, and thmtools packages. Using those it defines environments for notes that are either shaded or framed.

The nomoderntitles is a new option added in the latest version of Tufte-LATEX. It only works in the tufte-handout class. It disables coloring and styling of the section, subsection, and paragraph titles. The default is to color the titles and add a colored box to the left with section numbers inside it.

### Marginal Options

In the Tufte-LATEX classes there are four types of marginal materials, which are: sidenote, marginnote, caption, and citation. Each of those can have their justification set to one of the following options:

justified Sets the text to be justified (sets it flush left and right).

raggedleft Sets the text to be ragged left.

raggedright Sets the text to be ragged right.

raggedouter Sets the text to be ragged left on the left (verso) page, and ragged right on the right (recto) page. This is useful in conjunction with the symmetric document class option.

auto Justified the text if justified class option is on, otherwise used default ragged right text. This is the default justification option for marginal material.

Additionally, the marginals option can be used to set the justification settings for all marginal materials. See the Customizing Marginal Material section for more information on marginal material.

## Debugging Options

The debug option causes the Tufte-LATEX classes to output debug information to the log file which is useful in troubleshooting bugs. It prints list of options and their values under the Tufte-LaTeX settings section. Additionally the tufte-handout will print out a dedicated Tufte-LaTeX Handout settings section. It will also cause the graphics to be replaced by outlines. When combined with \geometry\( showframe \)\) command it will show margins for debugging page layout issues.

# Customizing Tufte-LETEX

The Tufte-LATEX 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-LATEX document classes to better fit your needs.

#### File Hooks

When creating many documents using the Tufte-LATEX classes, it's easier to store common customizations in one file. Otherwise they would need to be copied into the preamble of each document. The Tufte-LATEX classes provide three file hooks: custom-tufte-common.tex, custom-tufte-book.tex, and custom-tufte-handout.tex.

custom-tufte-common.tex If this file exists, it will be loaded by all of the Tufte-LATEX document classes, just prior to any class-specific code. If your customizations or code should be included in both the book and handout classes, use this file hook.

custom-tufte-book.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.

**custom-tufte-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.

This project comes with a custom-tufte-common.tex file hook that demonstrates how to use the file hooks. It shows how to change the monospaced font to RecursiveMono. You can use it as a starting point for your own customizations.

## 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 value of secnumdepth for the tufte-book class is -1. Note that this makes it impossible to use the cleveref package's \cref command with sections and subsections. This version of tufte-handout class sets the counter to 2 so sections and subsections are numbered. This change was made to make the sections stand out more as I found it hard to distinguish them from the body text. If you wish to revert to no numbering, set the counter to -1. You can also pass the nomoderntitles option to the tufte-handout class to disable the coloring and styling of the section and paragraph titles.

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

Table 7: Heading levels used with the secnumdepth counter.

# Changing the Paper Size

The Tufte-LATEX classes currently only provide three paper sizes: A4, B5, and US letter. To specify a different paper size (and/or margins), use the \geometry command in the preamble of your document (or one of the file hooks). The full documentation of the \geometry command may be found in the geometry package documentation.<sup>12</sup>

<sup>12</sup> Umeki 2008.

### 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. 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 Sets the text to be justified (sets it flush left and right).

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

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

raggedouter Sets the text to be ragged left if it falls on the left-hand (verso) page of the spread and otherwise sets it ragged right. This is especially useful when combined with the symmetric document class option.

auto If the justified document class option was specified, then the marginal text will also be 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. 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:

```
\start \setsidenotefont{\langle font\ commands \rangle}
\strut \
\star{setmarginnotefont}{\langle font\ commands \rangle}
\setcitationfont{\langle font \ commands \rangle}
```

The \setsidenotefont sets the font and style for sidenotes, the \setcaptionfont for captions, the \setmarginnotefont for margin notes, and the \setcitαtionfont for citations. The \( font commands \) can contain font size changes (e.g., \footnotesize, \Huge, etc.), font style changes (e.g., \sffamily, \ttfamily, \itshape, etc.), color changes (e.g., \color{tufte-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}

# New Features in Tufte-LETEX Classes

# Custom Colors

The new Tufte-LATEX document classes define a number of custom colors. They use these colors for things like links, citations, links, etc. In case of tufte-handout class it also uses them for the section titles. The common class uses the xcolor package to define the colors. You can choose to use these colors in your own documents as you see fit, redefine them, override them, or not use them at all. Here are the colors available in the Tufte-LATEX document classes:



The colors are defined with following values:

\definecolor{tufte-black}{HTML}{282828}
\definecolor{tufte-grey}{HTML}{F6F6F6}
\definecolor{tufte-white}{HTML}{FFFFFF}
\definecolor{tufte-red}{HTML}{E74C3C}
\definecolor{tufte-pastel-red}{HTML}{FADBD8}
\definecolor{tufte-orange}{HTML}{E67E22}
\definecolor{tufte-pastel-orange}{HTML}{FAE5D3}
\definecolor{tufte-pastel-orange}{HTML}{FAE5D3}
\definecolor{tufte-yellow}{HTML}{F1C40F}
\definecolor{tufte-pastel-yellow}{HTML}{FCF3CF}
\definecolor{tufte-pastel-green}{HTML}{D4EFDF}
\definecolor{tufte-pastel-green}{HTML}{D4EFDF}
\definecolor{tufte-blue}{HTML}{3498DB}
\definecolor{tufte-pastel-blue}{HTML}{D6EAF8}
\definecolor{tufte-pastel-blue}{HTML}{B598986}
\definecolor{tufte-pastel-purple}{HTML}{EBDEF0}

### Note Environments

Another feature common to the new Tufte-LATEX classes are two environments for notes. These notes can be used to highlight important information, provide references, or to simply make a note. It's useful for

making important informations stand out, without risk of being lost in the margins.

Both note environments provide a title, a label, and a continuation option. The title and label are optional, the label is used for referencing the note or for continuing a note later in the text. The ShadedNote environment creates a note with a shaded background. While the FramedNote environment places a frame to the left of the note. Both environments use the same counter as they are similar enough so it doesn't make sense to separate them.

**Note** 1. This is an example of the ShadedNote environment. It provides a shaded background for the note text. The note text can be long or short, although they should be short and to the point. Notes should be used to crucial information, not be a substitute for a paragraph

### Note 2 (Note Title)

This is an example of the FramedNote environment. Frames the note text with to the left of note and is more muted than the ShadedNote. In both cases the note text is italicized.

If you label an note, you can reference it using the \cref command. For example, Note 2 showcases the FramedNote environment. You can also use the  $\langle continues \rangle$  option to continue an note:

## Note 2 (continuing from p. 36)

This is a continuation of the previous note. It will be displayed in a new frame, but will have the same label, title, and number. Useful if you want to refer to or expand on previous note without having to repeat the information.

The way to use the note environments is as follows:

```
\begin{ShadedNote}[
  title={Optional title},
  label={Optional label},
  continues={Optional label}
]
  Note text here
\end{ShadedNote}
```

# Modified Section Headings

The tufte-handout class provides a new section heading style. Every section, subsection and paragraph will have their names colored, in addition the the usual styling. Additionally section and subsection titles will have a colored box placed to the left of the title. Section number will be placed inside the box. This is done to make the sections stand out more, as I found it hard to distinguish them from the body text. If you wish to revert to the default styling, you can pass the nomoderntitles option to the tufte-handout class.

The following figures shows the difference between the default and the new section heading style. Section Example Section Example

Subsection Example Subsection Example

Paragraph Example

Paragraph Example

Figure 4: Comparison between modern and old style section headings. Notice that the spacing between the sections is a little bit different. This was motivated by wanting to equalize the spacing between colored boxes.

## Installing and Compiling Tufte-LETEX

#### Local Installation

To install the Tufte-LATEX classes locally, download the source files from the GitHub repository<sup>13</sup>. Then you can place the following class files in the same directory as your TEX document:

- tufte-common.def
- tufte-handout.cls
- tufte-book.cls
- custom-tufte-common.tex (optional)

You can then either compile the document using latexmk or use the provided makefile to compile the document. See the Compiling Your Document section for more information on compiling the document.

## Global Installation

To install the Tufte-IATEX classes globally, you can place the class files in your TEX distribution's tex/latex/tufte-latex directory. When doing it by hand use the kpsewhich -var-value TEXMFHOME to find the correct directory, and copy the files there. After copying the files, you will need to update the TEX distribution's file database. To do that run the texhash command in the terminal.

You can also use the install target from provided makefile. This will do all these steps for you, installing additional documentation files and more.

### Installing from CTAN

**TODO!** Provide installation guide from CTAN when package is published there

## Compiling Your Document

The Tufte-LATEX classes can be compiled using pdf LATEX, XALATEX, or LuaLATEX. I personally recommend using LuaLATEX, as it provides the best support for Tufte-LATEX functionality without and quirks that XALATEX has.

<sup>13</sup> Repository can be found at https: //github.com/MormonJesus69420/ Modernized-Tufte-LαTeX The Tufte-LATEX classes are designed to work with the biblatex package for bibliographies. As such you will need to have biber installed on your system to compile the bibliography files.

#### Compiling with makefile

As mentioned before you can use the provided makefile to compile the sample documents with either make compile-lua, make compile-xe, or make compile-pdf. It is up to you which engine you prefer to use, but from my experience Lual provides the best results and is the most reliable of them all. In case of single files use the make compile-only FILE="<file>.tex" target. It is set up to use Lual by default, but you can change it to use Xall or pdf by the changing the -lualatex option to -xelatex or -pdflatex.

In general I would recommend changing the -outdir=samples in the LMKFLAGS variable to a directory of your choice, for example: -outdir=out.

If you wish to clean up the auxiliary files, use the make clean target. And the remove both auxiliary files and compiled PDFs use the make clean-all target.

IN MOST USECASES YOU CAN USE THIS simplified makefile, with only the necessary targets for most use-cases. You may use it to compile files using different LATEX classes too. As before you can change LuaLATEX for other engines.

```
LMKFLAGS = -outdir=out -auxdir=aux -bibtex

compile-all:
    latexmk $(LMKFLAGS) -lualatex -jobname=%A-lualatex \
    $(shell find . -maxdepth 1 -name '*.tex' -not -path '*/custom-tufte-*')

compile-only:
    if [ -z "$(FILE)" ]; then \
        echo "You need to provide a FILE parameter when using this target"; \
        echo "make compile-only FILE=\"<file>.tex\""; \
        else \
            latexmk $(LMKFLAGS) -lualatex -jobname=%A "$(FILE)"; \
        fi

clean:
        rm -rfv aux

clean-all:
        rm -rfv aux out
```

#### Compiling manually

You may also compile the documents with latexmk directly using the following command: Just substitute "«engine»" with your preferred engine, and "«source.tex»" with the name of your source file.

latexmk -outdir=out -auxdir=aux -bibtex -<<engine>> -jobname=%A-lualatex <<source.tex>>

You may also do things fully manually. To compile tufte-handout,

```
you should do something like this:
lualatex <<source.tex>> # Replace <<source.tex>> with the name of your source file
biber <<source>> # Note that the file extension is omitted
lualatex <<source.tex>>
lualatex <<source.tex>>
  To compile tufte-handout, you should do something like this:
lualatex <<source.tex>> # Replace <<source.tex>> with the name of your source file
        <<source>> # Note that the file extension is omitted
makeindex <<source.idx>> # If you are using an index
lualatex <<source.tex>>
lualatex <<source.tex>>
lualatex <<source.tex>>
```

## Compatibility Issues

When switching an existing document from one document class to a Tufte-LATEX 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 book 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-LATEX Website

The original website for the Tufte-LATEX packages is located at https://tufte-latex.github.io/tufte-latex/. On that website, you'll find links to the GIT repository, mailing lists, bug tracker, and documentation.

However as the project seems to be abandoned as of time of writing, the website may not be available in the future. Additionally some of the links there seem to have already been victim of link rot. You can find more help and information on the current development of the Tufte-LATEX classes at my GitHub repository.

https://github.com/MormonJesus69420/Modernized-Tufte-LaTeX TODO! Create a new website for the project and link it here

## Tufte-LATEX Mailing Lists

There is only one surviving mailing list for the Tufte-LATEX project:

Discussion list The tufte-latex discussion list is for asking questions, getting assistance with problems, and help with troubleshooting. Release announcements were also posted to this list.

Commits list The tufte-latex-commits list used to exist as well as a read-only mailing list. Messages were sent to the list any time the Tufte-LETEX code had been updated.

A more modern way to keep up with the development of the Tufte-LATEX classes is to follow the GitHub repository. You can use the *Discussions* feature to ask questions, suggest improvements, and interact with other users. In case you notice and bugs with the classes, or notice any issues with the documentation, you can open an issue on the GitHub repository. In case you want to contribute to the project, you can open a pull request on the GitHub repository.

I DON'T PLAN ON USING MAILING LISTS in my project, as I never got used to them, and feel that GitHub provides a more user friendly way to interact with the project.

You can subscribe to the tufte-latex discussion list at http://groups.google.com/group/tufte-latex

This list was available at http://groups.google.com/group/tufte-latex-commits

https://github.com/MormonJesus69420/ Modernized-Tufte-LaTeX/discussions

https://github.com/MormonJesus69420/ Modernized-Tufte-LaTeX/issues https://github.com/MormonJesus69420/ Modernized-Tufte-LaTeX/pulls

### Getting Help

If you've encountered a problem with one of the Tufte-LATEX document classes, have a question, or would like to report a bug, please create an issue or start a discussion on the GitHub repository.

To help with troubleshooting the problem more quickly, please try to compile your document using the debug class option. When asking for help include the generated .log file in the issue, along with a brief description of the problem, and if possible a minimal working example that reproduces the issue. You can also upload your whole document if you're not sure what's causing the issue, and you are comfortable with sharing the document.

## Errors, Warnings, and Informational Messages

The following is a list of all of the known errors, warnings, and other messages generated by the Tufte-IATEX classes and a brief description of their meanings.

Error: \subparagraph is undefined by this class.

The \subparagraph command is not defined in the Tufte-LATEX 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-LATEX document classes.

Error: \subsubsection is undefined by this class.

The \subsubsection command is not defined in the Tufte-LATEX 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-LATEX document classes.

Error: You may only call \morefloats twice

See the Tufte-LaTeX documentation for alternatives

LATEX 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 the Too Many Floats section on page 25 for more information.

Warning: Option ' $\langle class\ option \rangle$ ' is not supported -- ignoring option.

This warning appears when you've tried to use *⟨class option⟩* with a Tufte-LATEX document class, but *⟨class option⟩* isn't supported by the Tufte-LATEX 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 28 for more information on the symmetric class option.

### Package Dependencies

The following is a list of packages that the Tufte-LATEX document classes rely upon. Packages marked with an asterisk are either optional or only loaded for some class options.

- ams{math,symb,thm,xtra} \* for Note environments
- biblatex \* only if nobib is off, requires biber backend
- bidi \* only if using bidi option
- changepage
- chngpage \* only if changepage is not available
- cleveref \* for Note environments
- ETbb \* if available, and nofonts is off
- fancyhdr
- FiraMono \* if available, and nofonts is off
- fontenc \* only with pdfLTEX, and nofonts is off
- fontspec \* only with XHITEX or LuaUTEX, and nofonts is off
- geometry
- gillius2 \* if available, and nofonts is off
- hardwrap
- hyperref \* only if nohyper is off
- iftex \* if not it assumes pdfLITEX

- letterspace \* only if nols is off
- mathpazo \* if available, and nofonts is off
- multicol
- optparams
- paralist
- placeins
- ragged2e
- sectsty
- setspace
- soul \* only with pdfLATEX
- textcase
- textcomp \* only with pdfLITEX, and no fonts is off
- thmtools \* for Note environments
- titlesec
- titletoc
- transparent
- xcolor
- xifthen
- xkeyval

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