# canons-margins

Margin Notes and Sidenotes for Classical Layouts

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**Table 1:** Engines and formats with which canons-margins was tested.

#### Abstract

canons-margins provides margin note and sidenote functionality designed to integrate with the canons package or work standalone with standard LATEX layouts. The package unifies control over margin note and sidenote font sizes, colors, and justification across margin material either together or independently, with defaults that adapt to the underlying page layout with sensitivity to margin placement (alternating, left, right). We emulate sidenote numbering that supports global, per-section, per-chapter, and per-page schemes. When sidenotes is loaded, canons-margins integrates with it; otherwise it provides its own implementation via marginnote. All margin material uses footnotesize by default (configurable). A comprehensive package details section provides information condensed for at-a-glance review.

# Contents

1	Inti	roduction	3
	1.1	Minimal example	4
	1.2	Design philosophy	4
	1.3	Key features	4
	1.4	Quick start examples	5
2	Ma	rginnotes and sidenotes	5
	2.1	Why emulate sidenotes?	6
	2.2	The justification problem	6
	2.3	Integration modes	7
	2.4	Numbering schemes	7
3	Inst	tallation and prerequisites	8
	3.1	Manual installation	8
	3.2	Dependencies	8
		3.2.1 Required packages	8
		3.2.2 Optional packages	9
		3.2.3 Known incompatibilities	9
4	Pac	kage loading and options	9
	4.1	Basic loading	9
	4.2	Package options	9
		4.2.1 Size Control Options	10
		1	10
		4.2.3 Justification Control Options	11
		4.2.4 What "default" means (current implementation) with canons	12
		4.2.5 Numbering schemes	13
5	Cor	nmands and usage	13
	5.1	Marginnotes (unnumbered)	13
	5.2	Sidenotes (numbered)	14
	5.3		15
	5.4		15

6	Inte	egration with other packages	16
	6.1	Integration with canons	16
	6.2	Integration with sidenotes	17
	6.3	Standalone usage	
7	Exa	mple documents (with canons	18
	7.1	Notes-heavy technical document	18
	7.2	Luxury book with sparse annotations	18
	7.3	Commentary text	19
	7.4	Academic article with per-section notes	19
8	Tro	ubleshooting	20
9	Son	ne advanced features (brittle; not all fully tested	21
	9.1	Hybrid numbering	21
	9.2	Dynamic justification	
	9.3	Color coding by type	
A	Tecl	nnical limitation: justification in two-sided modes	23
		Core issue	23
	A.2	Why this limitation exists	
	A.3	Feature availability	
		Workarounds	
$\mathbf{R}$	Pac	kage details	24

### 1 Introduction

The canons-margins package manages margin notes and sidenotes with consistent formatting across different layout systems. It works alone or alongside canons; if the sidenotes package is present, it cooperates rather than overrides.

The package exposes size and color controls globally or separately for marginnotes and sidenotes. Justification is conservative by design: in one—sided layouts it defaults away from the text block and honors explicit settings; in two—sided layouts, marginnotes follow the document class, while the built—in sidenotes accept a single justification applied on both sides. When sidenotes is loaded, canons-margins aligns font sizing but does not replace its color or justification logic.

### 1.1 Minimal example

```
\usepackage{canons-margins}
...
\marginnote{A simple margin note}
Text with a sidenote\sidenote{A numbered sidenote}
```

### 1.2 Design philosophy

Rather than replace existing margin systems, canons-margins orchestrates them: if sidenotes is loaded, we integrate with it; if canons is present, we respect its margin semantics; otherwise we work with standard LATEX behavior. The goal is to be a *coordinator*, not a dictator.

You can control all margin material together (size, color, justification) or manage marginnotes and sidenotes independently. This allows both simple set-it-and-forget-it configurations and close typographic control.

The package detects the margin mode from canons (if present) and chooses appropriate defaults: right-aligned notes for left margins, left-aligned for right margins, adaptive behavior for two-sided layouts. Every default can be overridden explicitly.

### 1.3 Key features

- Works standalone or integrates with canons and sidenotes
- Unified or independent control of font sizes, colors, and justification
- Four sidenote numbering schemes: global, per-section, per-chapter, per-page
- Margin-mode-aware justification (adapts to right/left/symmetric/antisymmetric)
- Comprehensive font hooks for user customization
- Minimal dependencies; lightweight implementation

Margin notes and sidenotes are distinct; options can be unified or separate

#### Quick start examples 1.4

```
% Basic usage with canons
\usepackage[canon=tufte,margins=right]{canons}
\usepackage{canons-margins} % Inherits right-margin behavior
% Custom size for all margin material
\usepackage[size=small]{canons-margins}
% Different sizes for marginnotes and sidenotes
\usepackage[marginsize=false, marginnotesize=scriptsize,
            sidenotesize=footnotesize]{canons-margins}
% Per-chapter sidenote numbering with color
\usepackage[numbering=perchapter, color=blue]{canons-margins}
% With sidenotes package integration
\usepackage{sidenotes}
\usepackage[numbering=perpage]{canons-margins} % Forces sidenotes to
   reset per page
```

# Marginnotes and sidenotes

marginnotes and sidenotes serve distinct purposes:

Marginnotes are unnumbered annotations placed in the margin by \marginnote; Like this example these are typographically subordinate to the main text but structurally independent, and offer comments, clarifications, extensions without interrupting the linear argument in the text.

Sidenotes are numbered margin content analogous to footnotes, but placed laterally rather than at the bottom; they carry citations, references, digressions, detailed technical notes while preserving page real estate for the primary text flow.

<sup>1</sup> Like this example

Both types occupy the same physical space (the margin), but serve different rhetorical and structural functions. marginnote and sidenotes are premier LATEX packages for such materials; canons-margins recasts these roles to work with canons, and provides control over their functionalities while respecting their distinct roles.

### 2.1 Why emulate sidenotes?

LATEX'S native support provides only \marginpar for marginnotes. The marginnote [1] package improves upon this to account for placement in floats, footnotes, frames; it lacks numbered sidenote functionality, otherwise supplied by sidenotes [2] (among other functionalities, such as typesetting texts with notes, figures, citations, captions and tables). If sidenotes is not available, canons-margins provides a minimal replica of numbered margin material built on marginnote; sidenote emulation follows from three reasons:

- 1. a unified API for all margin content compatible with canons;
- 2. compatibility across document classes consistent with canons;
- 3. styling and control unavailable elsewhere (size/color hooks with reasonable defaults).

canons-margins treats marginnotes and sidenotes as related but distinct entities, each with potentially different visual weight (size), presentation (justification), and prominence (color); many documents benefit from uniform treatment, hence the default unified control with optional separation.

### 2.2 The justification problem

Standard LaTeX margin notes use \raggedright (flush left, ragged right) regardless of which margin they occupy. This creates typographic asymmetry: notes in the left margin appear to lean away from the text block. canons-margins solves this systematically with a modicum of control:

- 1. in single-sided layouts (margins=right or margins=left from canons), all notes go to one side; justification defaults to flush-toward-text (raggedright for right margins, raggedleft for left margins);
- 2. in two-sided layouts (margins=symmetric or margins=antisymmetric), notes alternate between outer and inner margins; justification adapts perside when using the justify=default setting;

3. by **explicit override**, any justification can be forced via options, overriding smart defaults.

### 2.3 Integration modes

canons-margins operates in three integration modes, depending on what other packages are being used:

Mode 1: Standalone. Neither canons nor sidenotes loaded; uses marginnote for placement, provides its own sidenote emulation, assumes standard LATEX two-sided margin behavior.

Mode 2: Canons integration. canons present, sidenotes absent; inherits margin mode (symmetric/antisymmetric/right/left), adapts justification accordingly; uses marginnote with mode-specific overrides.

Mode 3: Full integration. Both canons and sidenotes present; inherits margin mode from canons, patches sidenotes to respect formatting options; maintains API compatibility with both systems.

### 2.4 Numbering schemes

Sidenote numbering follows four strategies:

- numbering=global a single counter runs throughout the document; numbers never reset; appropriate for short works or when sidenotes are sparse;
- numbering=persection counter resets at each \section; uses \@addtoreset
  for predictable scoping; suitable for article-length documents with frequent
  sectioning;
- numbering=perchapter counter resets at each \chapter; ignored if the document class lacks chapters (e.g., article); standard intent for book-length works.
- numbering=perpage counter resets on each page via the perpage package (autoloaded); mimics footnote behavior; ideal for annotation-heavy texts where sidenotes function as lateral footnotes.

All schemes use \refstepcounter for proper label/reference support.

# 3 Installation and prerequisites

#### 3.1 Manual installation

- 1. Download canons-margins.sty from CTAN
- 2. Place in your local texmf tree:
  - Linux/Mac: ~/texmf/tex/latex/canons-margins/
  - Windows: C:\Users\[username]\texmf\tex\latex\canons-margins\
- 3. Refresh the filename database:

```
texhash ~/texmf # Linux/Mac
miktex --update-fndb # Windows
```

### 3.2 Dependencies

### 3.2.1 Required packages

• kvoptions : key-value option processing

• marginnote : core margin note functionality

• marginfix : fixes for margin note issues

• ifthen: conditional processing

• etoolbox : LATEX programming tools

• xparse : command definitions

• xcolor : color support

#### 3.2.2 Optional packages

• canons : page layout control

 $\bullet \;$  sidenotes : native sidenote support

#### 3.2.3 Known incompatibilities

- flowfram, parallel, paracol: these packages manage page layout at a fundamental level and may conflict with margin placement;
- tufte-book/tufte-handout classes: use their native sidenote commands; canonsmargins is redundant (though generally harmless);
- Other packages that patch marginnote internals may create conflicts.

# 4 Package loading and options

### 4.1 Basic loading

```
% Minimal
\usepackage{canons-margins}

% With options
\usepackage[size=small,color=blue]{canons-margins}

% With canons integration
\usepackage[margins=right]{canons}

\usepackage[marginsize=false,
    marginnotesize=footnotesize,
    sidenotesize=small]{canons-margins}
```

### 4.2 Package options

Options are processed via kvoptions. All options have sensible defaults and can be omitted.

#### 4.2.1 Size Control Options

marginsize toggles unified versus separate sizing. With unified control, size sets the font for all margin content (default footnotesize). With separate control, use marginnotesize and sidenotesize independently; available sizes are the standard LaTeX names listed below.

Option	Default	Purpose
marginsize	true	Unified control (true) or separate (false)
size	footnotesize	Size when marginsize=true
marginnotesize	footnotesize	Marginnote size when marginsize=false
sidenotesize	footnotesize	Sidenote size when marginsize=false

Table 2: Font size options

Valid sizes: tiny, scriptsize, footnotesize, small, normalsize, large, Large, LARGE, huge, Huge.

#### Examples.

#### 4.2.2 Color Control Options

margincolor toggles unified versus separate coloring. With unified control, color applies to all margin content; with separate control, use marginnotecolor and sidenotecolor. Leaving a color option empty yields the document text color.

Option	Default	Purpose
margincolor	true	Unified control (true) or separate (false)
color	(empty)	Color when margincolor=true
marginnotecolor	(empty)	Marginnote color when margincolor=false
sidenotecolor	(empty)	Sidenote color when margincolor=false

**Table 3:** Color options (empty is document text color)

Colors must be defined in the document preamble (via xcolor or color).

#### Examples.

#### 4.2.3 Justification Control Options

marginjustify toggles unified versus separate justification. Choices are default, flushleft, flushright, centered, justified. In one-sided layouts, default means away from the text block (right margin as ragged-right; left margin as ragged-left); in two-sided layouts, marginnotes follow the class/IATEX behavior (options not applied); the built-in sidenotes honor a single justification on both sides, with default currently fixed ragged-right; see §A.

Option	Default	Purpose
marginjustify	true	Unified control (true) or separate (false)
justify	default	Justification when marginjustify=true
marginnotejustify	default	Marginnote justification when marginjustify=false
sidenotejustify	default	Sidenote justification when marginjustify=false

**Table 4:** Justification options

Valid justifications: default (mode-aware), flushleft, flushright, centered, justified.

In greater detail, semantics of justification follows as:

- default: adapts to margin mode—raggedright for right margins, raggedleft for left margins, side-specific in two-sided layouts;
- flushleft: \raggedright (flush left, ragged right edge);
- flushright: \raggedleft (flush right, ragged left edge);
- centered: \centering (centered text);
- justified: full justification (may produce poor spacing and rivers in narrow margins).

#### Examples.

#### 4.2.4 What "default" means (current implementation) with canons

With margins=right or left, the package sets defaults away from the text block: right margin as ragged-right; left margin as ragged-left. Explicit justification options (flushleft, flushright, centered, justified) are honored, either unified via justify or split via marginnotejustify/sidenotejustify.

With margins=symmetric or margins=antisymmetric, behavior diverges: for *sidenotes* (built-in implementation only), explicit justification options apply uniformly on both sides; default is currently a fixed ragged-right. For *margin-notes*, justification options are not applied; the class/LATEX governs alignment. See §A.

**Note**: in two–sided layouts, per-note justification control for *marginnotes* is not available; this is deliberate to avoid fragile overrides. Details and workarounds appear in §A.

#### 4.2.5 Numbering schemes

numbering controls how the sidenotes reset their counters.

Option	Value	Behavior
numbering	global persection perchapter perpage	Single counter, never resets [default] resets at \section resets at \chapter (if class supports it) resets per page (loads perpage)

Table 5: Sidenote numbering schemes

```
Examples.

% Chapter-scoped numbering for a book

\usepackage[numbering=perchapter] {canons-margins}

% Footnote-style per-page numbering
\usepackage[numbering=perpage] {canons-margins}
```

## 5 Commands and usage

We inherit much functionality from marginnote, and emulate simple implementation of sidenotes.

## 5.1 Marginnotes (unnumbered)

\marginnote{text}[voffset] places an unnumbered note in the margin. The optional vertical offset voffset adjusts vertical position, and moves the note relative to its anchor (positive is downwards, negative is upwards); typical units are \baselineskip multiples. Marginnote content uses the configured size/color, and in one—sided layouts follows the default away from text justification; in two-sided layouts, class/IFTEX governs alignment.

Aesthetic of the marginnote uses \canonsmarginnotefont, \canonsmarginnotcolor, and \canonsmarginnotejustify.

#### Example.

```
Main text.\marginnote{Clarifying comment}
Further text.\marginnote{Another note}[2\baselineskip] % Shifted down
```

### 5.2 Sidenotes (numbered)

\sidenote[num] {text} inserts a mark in text and places numbered text in the margin. If num is omitted, increments the counter automatically. With the built-in implementation (when the sidenotes package is not loaded), sizing/color hooks apply and a single justification setting is used on both sides in two-sided layouts (default currently fixed ragged-right). When sidenotes is loaded, this package aligns font size but leaves color/justification to sidenotes.

Aesthetic of the marginnote uses \canonssidenotefont, \canonssidenotcolor, and \canonssidenotejustify.

\sidenotemark[num] typesets only the in-text sidenote mark; if num is omitted, increments the counter.

\sidenotetext[num]{text} typesets only the margin text with label; if num is omitted, uses the current counter value (does not increment).

#### Examples.

```
% Automatic numbering
Main text.\sidenote{First note}
More text.\sidenote{Second note}

% Manual numbering
Text.\sidenote[42]{Custom numbered note}
```

```
% Split mark and text
In the text\sidenotemark, more words.
% Later or in a different context:
\sidenotetext{The corresponding note text}

% Explicit number for both
Mark here\sidenotemark[5], text continues.
\sidenotetext[5]{Note text for mark 5}
```

### 5.3 Utility commands

\canonsmarginclear clears the margin area at the current position (inserts an empty \marginpar) to break up stacked notes; \canonsswitchmargin toggles the active margin for subsequent notes (for local reversals); \canonsresetmargin restores the default placement behavior (respects canons' margins mode if present).

#### Example.

```
Normal placement.\marginnote{On default side}
\canonsswitchmargin
Switched.\marginnote{On opposite side}
\canonsresetmargin
Back to normal.\marginnote{Default side again}
```

#### 5.4 Customization hooks

\canonsmarginfont controls the font used for margin content, applied to all margin material when marginsize=true; redefine it to change family/size globally; \canonsmarginnotefont is applied to marginnotes when marginsize=false; \canonssidenotefont is applied to sidenotes when marginsize=false.

The hooks \canons@sidenotemarkformat{num} (default: \textsuperscript) and \canons@sidenotelabelformat{num} (default: \textsuperscript with thin space) adjust the in-text mark and in-margin label formatting, respectively;

these apply only to the built-in sidenote implementation (not when the sidenotes package is loaded).

#### Examples.

```
% Make all margin material italic
\renewcommand*\canonsmarginfont{\footnotesize\itshape}

% Custom sidenote mark format
\renewcommand*\canons@sidenotemarkformat[1]{[\textbf{#1}]}
\renewcommand*\canons@sidenotelabelformat[1]{\textbf{#1}}.\,}
```

Create distinctive sidenote markers:

```
% Bracketed bold marks
\renewcommand*\canons@sidenotemarkformat[1]{[\textbf{#1}]}
\renewcommand*\canons@sidenotelabelformat[1]{[\textbf{#1}]\,}

% Dagger symbols for notes 1-9
\usepackage{pifont}
\renewcommand*\canons@sidenotemarkformat[1]{%
\ifnum#1<10\ding{\numexpr171+#1\relax}\else\textsuperscript{#1}\fi
}</pre>
```

# 6 Integration with other packages

### 6.1 Integration with canons

The canons package provides four margin modes: symmetric, antisymmetric, right, left. The canons-margins package detects and adapts to these modes automatically.

Canons mode	Margin placement	Default justification
right	right side only	flushleft (raggedright)
left	left side only	flushright (raggedleft)
symmetric	alternating outer	adaptive per side
$\verb"antisymmetric"$	alternating inner	adaptive per side

**Table 6:** Justification defaults by margin mode

**Note**: in symmetric and antisymmetric modes, justification options are not available due to architectural limitations. See Appendix A for full details and workarounds.

#### Example: Tufte-style layout.

```
\documentclass{article}
\usepackage[canon=tufte, margins=right]{canons}
\usepackage[numbering=perpage, color=darkgray]{canons-margins}
\begin{document}
Main text with extensive annotation.\sidenote{Technical detail}
More text.\marginnote{Cross-reference}
\end{document}
```

### 6.2 Integration with sidenotes

If sidenotes is loaded *before* canons-margins, canons-margins patches it to respect formatting options while preserving its API:

#### Example

```
\documentclass{article}
\usepackage{sidenotes}  % Provides \sidenote, \marginnote
\usepackage[size=small, color=blue, numbering=perpage]{canons-margins}
\begin{document}
Uses sidenotes commands\sidenote{But with canons-margins formatting}
\end{document}
```

If sidenotes is *not* loaded: canons-margins provides a lightweight sidenote implementation using marginnote; size, color, and (within current limits) justification hooks apply as documented here.

### 6.3 Standalone usage

Without canons or sidenotes, the package provides its own implementations and assumes standard LaTeX two-sided behavior.

#### Example

```
\documentclass{book}
\usepackage[numbering=perchapter]{canons-margins}
\begin{document}
Standard LaTeX layout.\sidenote{Numbered note}
\marginnote{Unnumbered annotation}
\end{document}
```

# 7 Example documents (with canons

### 7.1 Notes-heavy technical document

```
\documentclass{article}
\usepackage[canon=vdh, vdhN=12, margins=right]{canons}
\usepackage[numbering=perpage, size=scriptsize, color=darkgray]{canons-
    margins}
\begin{document}
Dense main text\sidenote{Citation or technical detail}
with frequent margin notes.\marginnote{Cross-reference}
\end{document}
```

### 7.2 Luxury book with sparse annotations

```
\documentclass{book}
\usepackage[canon=ateliers, ateliersstyle=luxury]{canons}
```

```
\usepackage[numbering=perchapter, size=small]{canons-margins}
\begin{document}
Generous margins for occasional commentary.\sidenote{Elegant note}
\end{document}
```

### 7.3 Commentary text

### 7.4 Academic article with per-section notes

```
\documentclass{article}
\usepackage{canons-margins} % Standalone, defaults to numbering=global
\begin{document}
\section{Introduction}
Text.\sidenote{Note 1}
\section{Methods}
New section.\sidenote{Note 1 again} % Same number, different context
% Better: use numbering=persection
\end{document}
```

#### Alternative:

```
\usepackage[numbering=persection]{canons-margins}
% Now sidenotes reset automatically at each \section
```

### 8 Troubleshooting

These encompass errors encountered or anticipated. This section is likely to change frequently over time.

Justification not applying in two-sided mode. Custom justification settings ignored in margins=symmetric or margins=antisymmetric mode. The marginnote package handles placement internally in two-sided mode; explicit justification control is limited. Solution: for closer control in two-sided layouts, use single-sided modes (margins=right or margins=left) or accept adaptive defaults.

**Sidenote numbers not resetting.** Sidenote counter continues across chapter-s/sections/pages despite setting numbering option. Solution: option must be set when package is loaded, not afterward. Solution:

```
% Wrong:
\usepackage{canons-margins}
\setcounter{sidenote}{0}  % Manual reset doesn't establish policy

% Right:
\usepackage[numbering=perchapter]{canons-margins}
```

\sidenotetext reuses wrong number. \sidenotetext without explicit number uses an unexpected value. Counter may have been incremented by intervening \sidenote or \sidenotemark. Solution: always use explicit numbers when mark and text are separated:

```
Text here\sidenotemark[3]
% ... other content, possibly with other sidenotes ...
\sidenotetext[3]{Text for note 3} % Explicit number matches mark
```

**Integration conflicts.** Formatting commands do not apply when sidenotes is loaded. Load order matters for patching. Solution: load sidenotes before canons-margins:

```
\usepackage{sidenotes}
\usepackage[size=small]{canons-margins}  % Patches sidenotes at \begin{
    document}
```

Colors not working. A classic problem: color options have no effect. Color names must be defined before use. Solution:

```
\usepackage{xcolor}
\definecolor{notecolor}{rgb}{0.3,0.3,0.7}
\usepackage[color=notecolor]{canons-margins}
```

# 9 Some advanced features (brittle; not all fully tested

Take care, all ye who enter here, with the following implementations; these are brittle, and need further testing.

### 9.1 Hybrid numbering

Reset per chapter but continue numbering within appendices:

```
\documentclass{book}
\usepackage[numbering=perchapter]{canons-margins}
\begin{document}
% ... main chapters with reset ...
\appendix
% Disable reset for appendices
\makeatletter
\@removefromreset{sidenote}{chapter}
\makeatother
% ... appendices with continuous numbering ...
\end{document}
```

### 9.2 Dynamic justification

Switch justification mid-document:

```
\usepackage{canons-margins}
% ... document start ...

% Switch to centered for a special section
{\renewcommand*\canonsmarginnotejustify{\centering}%
Special section.\marginnote{Centered note}
}% Scope ends, justification reverts

% Permanent change
\renewcommand*\canonsmarginnotejustify{\raggedleft}
```

### 9.3 Color coding by type

Different colors for different note types:

# References

- [1] Markus Kohm. marginnote. Notes in the margin, even where \marginpar fails. Version 2023-09-07. Repository: https://github.com/komascript/marginnote.git. CTAN. Sept. 2023. URL: https://ctan.org/pkg/marginnote (visited on 10/04/2025).
- [2] Andy Thomas. sidenotes. Typeset notes containing rich content, in the margin. Version 1.20. CTAN. Sept. 2024. URL: https://ctan.org/pkg/sidenotes (visited on 10/04/2025).

# A Technical limitation: justification in two-sided modes

This section documents the *current* behavior implemented in canons-margins.

#### A.1 Core issue

In symmetric and antisymmetric modes (two-sided layouts), the canons-margins package cannot override justification for marginnotes. The relevant code:

This is a fundamental architectural limitation, not a bug

We delegate control to LaTeX's built-in margin control; justification is controlled by document-class-level flags that we cannot safely override on a per-note basis.

### A.2 Why this limitation exists

The marginnote package uses different mechanisms:

- **one-sided**: direct positioning with full control;
- two-sided: delegates to \marginpar with automatic behavior.

We choose not to fight justification in two-sided layouts: it would require fragile low-level hacks that could break with different document classes; page detection in LATEX is non-trivial and unreliable when done manually; it would violate package boundaries and (potentially) conflict with other packages.

### A.3 Feature availability

In two-sided modes, justify, marginnotejustify, and sidenotejustify options are ignored; the system automatically provides sensible justification (ragged-away from the binding). Size and color controls still work

Works	Does not work
size control color control vertical positioning	justification options per-note justification

### A.4 Workarounds

For per-side control in two-sided layouts, consider a one-sided layout during drafting (margins=right/left) to exercise explicit justification. Use class-level or global redefinitions if you require uniform justification in two-sided layouts for marginnotes. If you need full visual control in two-sided books, consider post-processing approaches (e.g., TikZ overlays).

# B Package details

### Option summary

Option	Default	Values
marginsize size marginnotesize sidenotesize	true footnotesize footnotesize footnotesize	true false size command size command
margincolor color marginnotecolor sidenotecolor	true (empty) (empty) (empty)	true false color name color name color name
marginjustify justify marginnotejustify sidenotejustify	true default default default	true false default flushleft flushright centered justified same as justify same as justify
numbering	global	global persection perchapter perpage

# Command summary

Command	Purpose
<pre>\marginnote{text}[voffset] \sidenote[num] {text} \sidenotemark[num] \sidenotetext[num] {text}</pre>	unnumbered margin note numbered sidenote (auto-increment if num omitted) in-text mark only margin text only (uses current number if omitted)
\canonsmarginclear \canonsswitchmargin \canonsresetmargin	clear margin area toggle margin side reset to default side
\canonsmarginfont \canonsmarginnotefont \canonssidenotefont \canons@sidenotemarkformat{num} \canons@sidenotelabelformat{num}	font hook (unified mode) font hook (marginnotes) font hook (sidenotes) in-text mark format in-margin label format

# Integration detection

Package loaded	Effect	Notes
canons sidenotes both neither	inherits margin mode patches for formatting full integration ntandalone mode	justification adapts to right/left/symmetric/antisymmetric preserves sidenotes API; adds option control canons mode and sidenotes commands own implementation; standard LaTeX behavior

### Justification behavior

Margin mode	Default (justify=default)	Override
right left symmetric antisymmetric	flushleft (raggedright) flushright (raggedleft) adaptive per side adaptive per side	any explicit value any explicit value limited in two-sided mode limited in two-sided mode

# Minimal recipes

```
% Basic usage with canons
\usepackage[canon=tufte, margins=right]{canons}
\usepackage{canons-margins}
% Custom size
```