# Introduction to the Typesetting System Lag Nav One

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March 2024

## Learning Objectives

After the two workshop days, you will be able to:

- create simple documents in LATEX
- find assistance in class and package documentation
- create multilingual documents
- incorporate images and create tables
- generate reference lists
- typeset mathematical formulas
- structure larger projects

## Logistics

#### **Dates**

- Two sessions per date:
  - Saturday, February
     17
  - Sunday, February
     18
- Each session from 10 am to 3 pm
- Approximately 45 minutes break

- Saturday, March 2
- Sunday, March 3

#### Materials

 All materials are available on the workshop website or in ILIAS for download:

or

https://ma.latexkurs.de/



## Organizational Matters

#### **Exercises**

- · Theory and practical phases alternate.
- You are allowed (and encouraged) to try examples at any time on your computer.
- Feel free to experiment with something new immediately!
- Don't hesitate to ask if you're having trouble with anything.
- If you are using Overleaf, you can share your source code with overleaf@latexkurs.de when you have questions.

#### LATEX Flavor

The content of this course is based on the (relatively modern) variant LuaLATEX.

#### Content I

- 1 What is it all about?
- 2 Basic Operation
  Classes and Packages
  Basic Commands
- 3 Typographic Basics Macrotypography Microtypography
- 4 Documentation & Error Messages
  Documentation
  Error Messages
- **5** Languages
- 6 Floating Objects
  Float Environments
  Graphics

#### Content II

- BibliographiesbiblatexManaging References
- 8 Math Typesetting
- Tables
  Beautiful Tables
  Automatic Column Width
- 10 Larger Projects
- 11 Charts

#### Part I

## The Name of the Game

#### The Name of the Game

- Program T<sub>E</sub>X (Since 1977)
   Written by Donald E. Knuth for his book "The Art of Computer Programming".
   "TeX" from Greek τέχνη
- Macro package plainT<sub>E</sub>X
   Makes T<sub>E</sub>X usable for regular users.
- Extended macro package LaTEX (Early 1980s)
   By Leslie Lamport: "Lamport's TEX".
   Many simplifications for the average user.
- Current stable version: LaT<sub>E</sub>X 2<sub>ε</sub> (1994) "in an ε-environment of 2"
- Future development:  $\LaTeX$ 3 not yet independently available, but as a package expl3 in  $\LaTeX$ 2 $_{\mathcal{E}}$

## What is T<sub>E</sub>X – and what is it not?

#### LATEX is well-suited for...

- · All documents with a logical structure
  - Scientific papers (excellent mathematical typesetting)
  - Humanities papers (excellent multilingual support, bibliography creation, apparatus creation, etc.)
  - · Articles, bachelor's theses, dissertations, etc.
  - Book series, letters
  - Presentations
- Much "abuse" by creative package authors

#### LATEX is less suitable for...

- · Documents without a logical structure
  - Presentations (colorful, rotating, blinking, "chaotic")
  - Flyers
  - Posters

## How does TEX work?

- WYSIWYM
- · Plain text files
- No hidden settings
- Text formatting using special commands:
  - "I want to write an article!"
  - · "Create a heading!"
  - · "Make the following bold!"
  - "Create a table that..."

## How does TEX work?

#### Advantages

- · Stability and portability
- Small file sizes
- Editable with any text editor
- Text files are always readable
- Consistent output everywhere

#### Disadvantages

- · Result not immediately visible
- · Non-intuitive interface
- Steep learning curve
- Changes require recompilation
- Complex layout desires are hard to achieve

## A simple T<sub>E</sub>X document

How can text be distinguished from commands?

Approach in *classical* programming languages:

```
print ( "Hello, World!" );
```

⇒ unsuitable for a typesetting program

## A simple TEX document

- TEX is a markup language
- · Individual characters have special meanings
- Backslash (\) serves as an escape character and marks the beginning of a command: \chapter \section \author

#### Simplest T<sub>E</sub>X document:

Hello, World! \bye

\$ tex document.tex
creates a .dvi document and a .log file

## A simple LTEX document

```
\documentclass{minimal}
\begin{document}
Hello, World!
\end{document}
```

```
Hello, World!
```

#### Assignment

Create your first  $\Delta T_E X$  document by typing this minimal example in your editor!

#### **Command Characters**

escape character, marks the beginning of commands
 grouping character, groups related characters together
 e.g., arguments \textbf{bold}

math character, starts and ends math mode

tabbing character, separates columns in tables

comment character, comments out the rest of the line

--# other characters with special meaning

#### Part II

## **Basic Operation**

#### **Document Classes**

Document classes define fundamental properties of the document:

- Layout
- · Default fonts
- Page layout
- · Sectioning commands
- Appearance of lists, tables, enumerations, etc.

Properties can be customized by changing options or loading packages.

#### **Document Classes**

#### **Standard Classes**

article (Short) articles

report Reports, conference reports

book Books

letter Letters

minimal For minimal examples

#### **KOMA-Script**

scrartcl Extension of article

scrreprt Extension of report

scrbook Extension of book

scrlttr2 Very powerful letter class

#### **Special Classes**

beamer For presentations

tikzposter Scientific posters

## **Packages**

- · Packages provide additional functionality
- Work facilitators
- · Error corrections
- Include in the preamble using \usepackage[ $\langle option(s) \rangle$ ]{ $\langle package \ name \rangle$ }:

```
\documentclass{article}
\usepackage{
  amsmath,
  hyperref,
}
\usepackage[left=2cm]{geometry}
```

## Sectioning Commands

- Sectioning structures organize documents
- Enable automatic numbering, entry in tables of contents, column titles, etc.
- · Defined by the document class
- · Basic structure defined in the kernel
- ⇒ certain elements always available

```
\teil{Part I}
\chapter{Chapter}
\section{Section}
\subsection{Subsection}
\subsubsection{Subsubsection}
\paragraph{Paragraph}
\subparagraph{Subparagraph}
```



## Basic Commands

General

```
\textrm{Serif}
                          Serif
                                 Abcdxvz
\textit{italic}
                          italic
                                 Abcdxyz
\textsl{slanted}
                          slanted
                                   Abcdxvz
\textsf{sans-serif}
                          sans-serif Abcdxvz
\textbf{bold}
                          bold
                                 Abcdxvz
\texttt{typewriter}
                          typewriter Abcdxvz
\textsc{Small Caps}
                          SMALL CAPS ABCDXYZ
\emph{emphasis}
                          emphasis Abcdxyz
                          Line break
//
\par or blank line
                          Paragraph break
                          Inline math mode: E = \frac{p^2}{2m}
E = \frac{p^2}{2m}
                          Display math mode: E = \frac{p^2}{2}
\Gamma = \frac{p^2}{2m}
                          Produces table of contents
\tableofcontents
\todav
                          Current date
```



## **Basic Commands**

Font Sizes

```
\tiny
            tiny
\small
            small
\normalsize
            normal
            large
\large
            larger
\Large
            even larger
\LARGE
            huge
\huge
            even huge
\Huge
```



## Auxiliary Files

.tex	<b>Input</b> T <sub>E</sub> X file with document text
.pdf	Output pdfTEX output or conversion from (x)dvi
.log	Auxiliary files (write only) Log file with information, warnings, errors
.aux .toc .lof .synctex.gz :	Auxiliary files (read and write) Auxiliary file with temporary information table of contents list of figures required for the SyncTEX feature :

#### Part III

## Basics of Typography

## Macrotypography

- Text Area
- Header and Footer
- Font Selection
- Formatting Spacing
- Appearance of Index, Footnotes, etc.

#### Assignment

Download the file exercise\_layout. tex from the workshop website. Apply all typographic settings discussed to this file step by step.

Ideally, choose values that meet the requirements for your upcoming thesis.



#### Guidelines for Bachelor Theses in Economics



```
Format one-sided DIN A4
Font Size 12 pt
Line Spread 1.5 pt
Alignment justified ("Blocksatz")
Left and right margin 3 cm
```

Guidelines for Bachelor theses

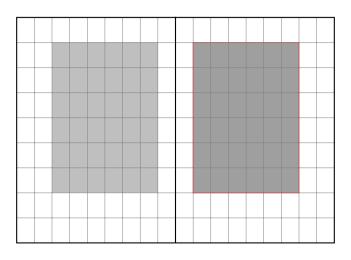


#### Text Area

The text area refers to the portion of the page covered by the text (as opposed to the margins).

- Single or double-sided layout?
- Font size, line width,
- · Header and footer
- Text columns

## Modern Text Area Construction



## Text Area in Gutenberg's Printing



## Text Area with KOMA-Script

- KOMA-Script provides optimal text area construction through its own package typearea.
- Adjustment is usually necessary only for exceptionally wide or narrow fonts:
   Option DIV=\(\rangle Factor \rangle\)
  - Automatic calculation based on page size: DIV=calc Calculation based on medieval book page canon: DIV=classic
- Binding correction using option BCOR=\(\lambda Length \rangle\)

\documentclass[DIV=9, BCOR=12mm]{scrbook}

For non-KOMA classes, typearea must be loaded directly:

\usepackage[DIV=13, BCOR=2cm]{typearea}

## Text Area with geometry

Package geometry allows manual adjustment of the text area:

```
\usepackage[top=2cm, bottom=5cm]{geometry}
```

or:

\usepackage{geometry}

\geometry{top=2cm, bottom=5cm}

## Text Area with geometry

### **Possible Options**

```
paper
left, right, inner, outer, hmargin
top, bottom, vmargin
margin
bindingoffset, textwidth, textheight
twocolumn, columnsep, marginparsep, footnotesep
headsep, footsep, nofoot, nohead
hoffset, voffset, offset
includehead, includefoot
```

## Line Spacing

Package setspace allows adjustment of line spacing:

```
\usepackage{setspace}
\singlespacing
\onehalfspacing
\doublespacing
```

Spacing in footnotes, etc., remains the same.

Fine-tuning:  $\setstretch{\langle Factor \rangle}$ 

#### Headers and Footers

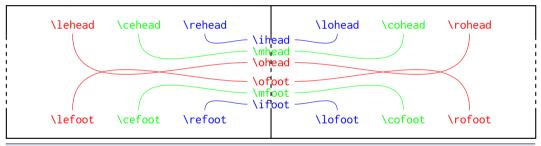
- Headers and footers contain important information about the document
  - Live column titles
  - Page numbers
- Adjustment using various packages
- Selection via  $\pagestyle{\langle page style \rangle}$  or  $\thispagestyle{\langle page style \rangle}$
- Default settings: empty, plain, headings



## Headers and Footers with scrlayer-scrpage

The package defines two page styles: scrheadings and screadings.plain Adjustment is done through, e. g.

 $\label{lem:lehead} $$ \left( content plain.scrheadings \right) $$ \left( content scrheadings \right) $$$ 



```
\documentclass{scrartcl}
\usepackage{scrlayer-scrpage}
\lohead*{Jane Smith}
\rohead*{Pagestyles with KOMA-Script}
\pagestyle{scrheadings}
```

#### **Font Selection**

 Many fonts are available as packages and can be loaded with \usepackage{\langle package name\rangle}

\usepackage{nimbusserif}

 Fonts available in TeXlive can be found in the "MTeX Font Catalogue" http://www.tug.dk/FontCatalogue/





#### **Font**

- Package fontspec allows access to system fonts (OTF, AAT, TTF).
- Fonts are loaded via special commands \setmainfont[\(\rangle Options \rangle ]\) \(\{\rangle Font \ Name \rangle \}\)

```
\usepackage{fontspec}
\setromanfont{Linux Libertine 0}
\setsansfont{Linux Biolinum 0}
\setmonofont[Scale=.95]{DejaVu Sans Mono}
```

 Loading specific fonts or features in the document with \fontspec{\(\lambda\) Font \(Name\rangle\)}[\(\lambda\) Features\(\rangle\)]



#### Font Size

The size of the main font can be changed by class option:

\documentclass[12pt]{scrartcl}

Size of \large, \small, etc. adjusts automatically. Standard classes support 10pt, 11pt, and 12pt.

For those who *know exactly* what they want: \fontsize{\(\lambde{Size}\)\{\(\lambde{Baseline Skip}\)\}\\selectfont

\fontsize{10}{12}\selectfont

## Implementation

#### Assignment

Adapt your document according to the specifications for bachelor theses!

Format one-sided DIN A4

Font Size 12 pt

Line Spread 1.5

Alignment justified

Left and right margin 3 cm

#### **Environments**

• LATEX documents are often structured by environments:

```
\begin{ \langle \textit{Environment} \rangle } [\langle \textit{Optional Arguments} \rangle ] {\langle \textit{Arguments} \rangle } \\ ... \\ \begin{ \langle \textit{Environment} \rangle } \\ \end{ \langle \textit{Environment} \rangle }
```

- Commands are executed at the beginning and end to achieve specific behavior within the environment.
- Each environment is a group (like {})
  - $\Rightarrow$  All settings within an environment are local.

#### **Environments**

### **Important Environments**

ItemizationitemizeEnumerationenumerate

Description list description

Verbatim verbatim

Two-column layout twocolumn

Quotation quotation

Short quote quote
Centered center

Table tabular, tabularx, tabulary,

supertabular etc.

Figure figure

Floating table table

Equation align (Math)

Matrix matrix (Math)

#### **Environments**

#### Simple Lists

```
\begin{itemize}
 \item First item
 \item Second item
 \item[3] Third item
\end{itemize}
\begin{enumerate}
 \item First item
 \item Second item
 \item[3] Third item
\end{enumerate}
```

- First item
- · Second item
- 3 Third item

- First item
- 2 Second item
  - 3 Third item

Appearance of itemize and enumerate is determined by document class.

## Implementation

#### Assignment

Add one or more quotes to your document. Observe the difference between quote and quotation.

Also, test the appearance of other environments like itemize and description.

Microtypography refers to the design of fine details at the letter level:

protrusion Optical margin alignment

Lorem ipsum dolor sit amet consectetur, adipisici elit, sed eiusmod tempor incidunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullameo laboris nisi ut aliquid ex ea commodi consequat. Quis aute iur erprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint obcaecat cupiditat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Microtypography refers to the design of fine details at the letter level:

```
protrusion Optical margin alignment expansion Adjustment of glyph width (≤ 2%)
```

Text Text

Microtypography refers to the design of fine details at the letter level:

```
protrusion Optical margin alignment expansion Adjustment of glyph width (\leq 2%)  
    tracking Adjustment of glyph spacing within words (\leq 3%)  
    VA Fo
```

Microtypography refers to the design of fine details at the letter level:

protrusion Optical margin alignment	fi fi
expansion Adjustment of glyph width (≤ 2%)	fl fl
tracking Adjustment of glyph spacing within words	ff ff
(≤ 3%)	ffl ffl
ligatures Connection of multiple letters to a single glyph	Qu Qu
giypii	_

The package microtype takes care of these typographic subtleties. Usually, the default settings are sufficient:

\usepackage{microtype}

- Automatically activates protrusion (in pdfTEX, XETEX and LuaTEX) and expansion (in pdfTEX and LuaTEX)
- For further options: Documentation

#### Assignment

Activate optical margin alignment in your document.

## Whitespace and Dashes

Good typography distinguishes between various width spaces and horizontal dashes

- normal space
- thin space: \,
- hair space: \enskip
- em space (white square): \quad
- negative space: \!
- explicit kerning: a\kern-.1em b
- en dash: -
- em dash, German hyphen: --
- horizontal bar, English hyphen: ---
- minus sign: \$-\$

a b a

e.g.

e.g. e.g.

b

ab

ah

a-b

a-b

a-b a-b

a + b

#### Part IV

## Documentation & Error Messages

#### Documentation

- (LA)TEX is excellently documented.
- · Each class and package usually comes with its own manual.
- Documentation can be accessed using the texdoc command.

#### Documentation

#### On the command line:

- \$ texdoc searches the LATEX folders for documentation.
- \$ texdoc amsmath opens amsmath.pdf.
- \$ texdoc -1 amsmath lists all results.
- \$ texdoc -s amsmath provides results from an extended search.
- \$ texdoc --help displays help.

Graphical interface: texdoctk/texdoc-gui

Web service: http://texdoc.org

#### Assignment

Open the English documentation of the KOMA-Script classes using the texdoc mechanism.

## **Handling Errors**

#### What to do when LaTeX stops?

- Stay calm! (tex files cannot be damaged)
- Start troubleshooting with the latest changes.
- Correct any typos if necessary.
- · Read the log file!
- Many editors assist in error detection by jumping to the line where the error occurred. (It may not be the faulty line.)

## Error Messages

#### Typical error message:

```
! Undefined control sequence.

1.3 Ein \Latex-Dokument
.
?
! Emergency stop.

1.3 Ein \Latex-Dokument.
.
.
No pages of output.
Transcript written on document.log.
```

⇒ Command misspelled in line 3

## Error Messages

#### Typical error message:

 $\Rightarrow$  Forgot a  $\}$  or an  $\end{}$  somewhere after itemize.

## Complete Minimal Working Example (MWE)

When seeking help in web forums/Usenet, a *complete Minimal Working Example* (MWE) is usually requested.

- 1 Delete code from the document until the error occurs.
- 2 Remove all unnecessary packages.
- 3 Use minimal if the document class does not matter.
- 4 If the error occurs only with a lot of text, use blindtext.

Often, you can find the error while creating the MWE alone.

#### Assignment

Download the document exercise\_errors.tex from the workshop homepage, create an MWE, and try to fix all errors if possible.



## Part V

# Languages

## Languages

The document must be localized based on the input language.

- Hyphenation rules
- · Names of directories, chapters, etc.
- Typographic peculiarities

\usepackage{polyglossia}
\setmainlanguage{german}
\setotherlanguage{english}



## **Loading Languages**

```
\label{lem:language} $$\operatorname{(Options)}_{\langle Language\rangle} $$\operatorname{(Dptions)}_{\langle Language\rangle} $$\operatorname{(Languages)} $$
```

#### Available Languages:

## **Switching Languages**

Command  $\text{text}(\text{Language})\{(\text{Text})\}\$  for individual words Environment  $\text{begin}\{(\text{Language})\}\$  for longer passages

```
% in the preamble:
\setmainlanguage{english}
\setotherlanguages{french, greek}
% in the document:
The document body is in English, but single words can be in \textgreek{
ελληνικά or \textfrench{francais}.
\begin{french}
  Il est également possible d'écrire des phrases entières en français.
\end{ french}
```

## **Localized Objects**

Labels of elements in the text adapt to the language:

```
heute ist der \today \\
\textenglish{today is \today}\\
\textrussian{ сегодня, является \today }
```

```
heute ist der 2024-02-16
today is 2024-02-16
сегодня, является 16 февраля 2024 г.
```

#### Assignment

Ensure correct hyphenation in at least two languages in your document.

# Floating Objects

## What are Floating Objects?

- · Objects that can freely "float" within the document
- · Floating helps avoid large blank spaces
- TEX tries to achieve optimal positioning
- Considerations:
  - Objects should not appear before references
  - · Objects should not swap order
  - · Page breaks heavily depend on floating objects
  - Optimal page breaks are not possible with T<sub>E</sub>X!

#### Float Environments

A float environment consists of various parts:

- Content (image, table, text, ...)
- Automatic labeling: "Table 1:" (\caption)
- Caption: "Measurement results" (argument of \caption{})
- Label for references: \label{fig:comparison-data}
- The label can be referenced in the text using \ref{fig:comparison-data}
- $\bullet$  \listoffigures and \listoftables automatically create lists of figures and tables

#### Float Environments

- LATEX provides various float environments:
- table for tables
- figure for images
- · float package allows defining custom environments
- For two-column layout: table\*, figure\* spanning both columns



#### Float Environments

#### Positioning parameters for float environments:

 $\boldsymbol{\beta} = \boldsymbol{\beta}$ 

- ! Overrides internal parameters
- h Set object exactly at this point
- t Set object at the top of the page
- b Set object at the bottom of the page
- p Set object on a dedicated float page or column
- H "exactly here and nowhere else" float package

#### table

```
\begin{table}
  \centering
  \begin{tabular}{ccc}
    a & b & c
  \end{tabular}
  \caption{A meaningless table}
  \label{tab:meaningless}
\end{table}
In the text, you can refer to Table
\ref{tab:meaningless}.
```

b c

Table 1: A meaningless table

In the text, you can refer to Table 1.

## Non-floating Float Environments

```
Present non-floating environments as floating environments: caption package
```

```
A small image in a text that is not really an image:
```

```
\begin{minipage}[b]{3cm}
  \fbox{ I am not an image }
  \captionof{figure}{test}
\end{minipage}
```

In the \verb/minipage/, any content can be placed \dots

A small image in a text that is not really an image:

I am not an image

Figure 1: test

In the minipage, any content can be placed ...

## Including External Graphics

#### \usepackage{graphicx}

- Basic command:  $\include{eq} aphics[\langle options \rangle] {\langle file \rangle}$
- key=value interface:

[scale = 
$$0.5$$
, angle= $50$ ]

- File extension is not required
- Avoid using absolute path names (portability)

## **Including Graphics**

```
\includegraphics[width=2cm]{raptor.pdf}
\includegraphics[width=.3\textwidth,angle=25]{raptor}
```



## Options for includegraphics

\includegraphics has many options, e.g.,

```
scale 0.8
width .2\textwidth,15pt,...
height 2em,40mm,...
keepaspectratio true or false
angle 50
bb 0 0 10 20
clip true or false
```

 $\Rightarrow$  see documentation for graphicx

## Multiple Images in One Figure

```
\usepackage{subcaption}
\begin{figure}
 \begin{subfigure}{.5\textwidth}
    \includegraphics{image1}
    \caption{First subfigure}
 \end{subfigure}
 \begin{subfigure}{.5\textwidth}
    \includegraphics{image2}
    \caption{Second subfigure}
 \end{subfigure}
 \caption{Caption for both images}
\end{figure}
```

The subcaption package provides the subfigure environment within the figuenvironment.

http://an3.de/t

## Further Reading I

Frank Mittelbach and Ulrike Fischer.

"The LATEX companion."

Addison-Wesley, 2023.

Tobias Oetiker et al.

"The (Not So) Short Introduction to  $\LaTeX$  2 $_{\mathcal{E}}$ ."

texdoc lshort

Robert Bringhurst.

"The Elements of Typographic Style."

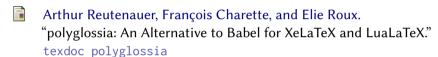
Vancouver: Hartley & Marks, 1992.

陯 🏻 Markus Kohm.

"KOMA-Script."

texdoc koma-script 2023.

## Further Reading II





# Happy TEXing