# Page styles on steroids or *memoir* makes page styling easy

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Abstract Designing a page style has long been a pain for novice users. Some parts

are easy; others need strong IATEX knowledge. In this article we will present the *memoir* way of dealing with page styles, including new code added to the recent version of *memoir* that will reduce the pain to a mild

annoyance.

We will end the article with a series of common scenarios and how to

solve them.

# Prerequisites

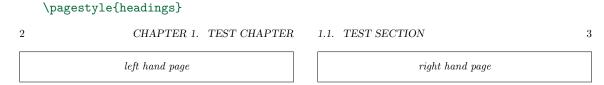
The prerequisite for this article is access to a recent version of *memoir* (that is, *memoir* v1.61803, released in June 2008 or newer; we will refer to v1.61803 as *memoir* 2008).

# Preliminary information

Examples in this article that show a graphical result have been created using the *memoir* class, displaying a two-sided setup. The examples will show a left-hand (even) page and a right-hand (odd) page, with a dummy text block leaving all attention on the headers and the footers. We have also added a dummy chapter, section, subsection and subsubsection, in order to show their effect on the page styles (header information). One can think of the material as page two and three of a chapter that starts out as

```
\chapter{Test chapter}
\section{Test section}
\subsection{Test subsection}
\subsubsection{Test subsubsection}
```

Source code in examples will be shown in a green color; code in the text and showing syntax will be shown in a red color; and page styles will be shown in cyan. Here, for instance, is an example displaying the default page style in *memoir*, known as headings:



In this article we will handle only the *two-sided* setup. The *one-sided* counterpart comes rather easily; just remember that whenever the oneside option is in effect, the page style design for all pages will be the one corresponding to an odd page.

#### 1 The basics

In this section we will summarise the basics concerning page style handling, plus we will list some of the challenges that we face compared to the standard classes (book, report and article).

## 1.1 What is a page style?

In LATEX the *page style* refers to the part of the page building mechanism that attaches the headers and footers to the actual page. Technically, in a two-page setup, the headers and footers are inserted via four macros \@evenhead, \@odd-head, \@evenfoot and \@oddfoot. Activating a particular page style will redefine these four macros to do whatever the style is designed to.

REMARK. Please note that the actual vertical placement of the headers and footers is not a matter of the page style. This depends on the dimensioning of the page layout.

## 1.2 Activating a page style

A page style can be activated in two ways: globally and locally (here locally means *on this page only*).

```
\pagestyle{\langle style \rangle} \\ this pagestyle{\langle style \rangle}
```

\pagestyle{ $\langle style \rangle$ } activates  $\langle style \rangle$  from the next page and onwards, while \thispagestyle{ $\langle style \rangle$ } enables  $\langle style \rangle$  on this page only.

The page style used on a particular page is decided as follows. If any \thispagestyle macros have been issued on this page, we use the last one. If no \thispagestyle macros have appeared, we use the global page style (i.e. the style recorded to have been set via a \pagestyle at the *previous* page break/start).

#### 1.3 Making material available for the headers and footers

In the header and footer we can add static information, i.e. define the four macros to just display some non-changing string. But we also have access to more dynamic information such as the page number (via \thepage), and via special macros we can provide access to all sectional titles.

To make titles available we make use of so called *marks*, \leftmark and \rightmark, which are available on all pages. These can be set, in macros, using

```
\markboth{\(\for\) left mark\)}{\(\for\) right mark\)}
\markright{\(\for\) right mark\\)}
```

There is no separate \markleft. For the page building mechanism the content of the \leftmark and \rightmark is determined as follows: \leftmark contains the last \langle for left mark \right\ issued before the end of the page, while \rightmark contains the first \langle for right mark \rangle issued on the page. If none have been issued on this page the most recently defined one from former pages will be used.<sup>2</sup>

<sup>1.</sup> The user may also use them manually in the text, though this might annoy copy editors.

<sup>2.</sup> Note that in some circumstances some confusion may arise concerning the content of the marks, see [4], section 4.3.4, page 218–219, although the marks work without any problems in most normal chapter-based documents.

To ease things, all sectional macros have been equipped with a special macro, named \(\sectional macro\)mark, e.g. \sectionmark, which will be given a title as an argument. These sectional marking macros initially do nothing, but they can be redefined to use \markboth or \markright.

REMARK. Please recall that the sectional macros in LATEX support up to two titles, i.e.

where  $\langle for text \rangle$  will be used for all if  $\langle for head and toc \rangle$  is missing.

In memoir we extend this even further by supporting the syntax above and supplementing it with

```
\chapter[\langle for\ toc \rangle][\langle for\ head \rangle] \{\langle for\ text \rangle\}
```

In addition to the sectional macros, several other macros add material to the marks, including the table of contents (adding \contentsname), the index (adding \indexname), the bibliography, etc.

# 1.4 Challenges

As most LATEX users know, the standard classes (book, article, report), are not particularly flexible. There are basically no configuration interfaces at all; one needs to resort to external packages.

In the area of page styling, the situation in the standard classes is no different. The standard classes have several annoying features regarding the material used in the page styles.

- (1) All mark content provided by \chapter, \section, etc. are hardwired to be in upper case.
- (2) Marks set by macros and environments such as \tableofcontents, the bibliography and the index are all in upper case. This feature cannot easily be changed without having to copy a large number of code lines and then only changing one or two lines of that code.
- (3) In case your setup allows a blank page before starting a new chapter (default in the book class), that »blank« page is not really blank; it has the same page style as all other regular pages, which looks odd if there is no other content

- on the page. The solution is to manually change \cleardoublepage in order to automatically make these pages truly blank.
- (4) There is no easy way to redesign the look of the footers and headers.
- (5) Creating truly flexible sectional marking macros \chaptermark, \sectionmark, etc. used internally by \chapter etc. demands a lot of LATEX knowledge from the (novice) user.

The fancyhdr package can handle several of these problems but with some costs. As far as I know it does not provide an easy solution to item (5).

# 2 Page styling in memoir

In *memoir* we deal with two types of page styles, *aliases* and *regular* page styles. An alias page style is a style that just refers to another style, i.e. if the style alias is an alias for the empty style, then \pagestyle{alias} is the same as \pagestyle{empty}. The advantage of having aliases is that we can, for example, provide the first page of a chapter with its very own page style without the need to create a specific style for it. We just let the chapter style point to some other style, say, plain; and if we later decide that we want a different look for the chapter title page, then we just let chapter point to some other page style.

# 2.1 How page styles work in memoir

As mentioned earlier the headers and footers are added to the page via the four macros  $\ensuremath{\mbox{\tt Qevenhead}}$ ,  $\ensuremath{\mbox{\tt Qevenfoot}}$  and  $\ensuremath{\mbox{\tt Qoddfoot}}$ . In *memoir* a given page style  $\langle style \rangle$  consists of a number of specially created macros, all associated with the name  $\langle style \rangle$ , and activating  $\langle style \rangle$  causes LATEX to rebuild those four macros using the current content of the macros associated with  $\langle style \rangle$ .

The *memoir* page style interface interacts with the special macros associated with  $\langle style \rangle$ .

REMARK. There is one important thing to remember. Whenever one has changed a page style in memoir (we will cover this shortly), that page style has to be activated in order for the changes to take effect. For a main document style, this means that you have to issue \pagestyle{\style}} AFTER you have made any changes to the style. The reason is that we use the contents of the \style\ macros, not the macros themselves.

For styles that are just used on local pages, like the chapter style, no reactivation is necessary.

## 2.2 Creating a new pagestyle

In *memoir* we use one of the following macros to create a new page style:

 $\mbox{makepagestyle}{\langle name \rangle}$  will create a new page style named  $\langle name \rangle$  with all of its corresponding internal macros initialised to do nothing.

\copypagestyle{\(new name\)}{\(\lambda\)},\) does the same, but initialises the internal macros to use the contents of the internal macros which currently form the style \(\lambda\) old name\(\rangle\). This is very handy, as it allows you to copy a specific style, and change the headers in the copy while maintaining the look of the original footers.

\aliaspagestyle{\langle} \{\langle original\rangle}\} \ does *not* create internal macros corresponding to its own name. As a consequence, changing an alias page style using the macros we will present in the next section will have unexpected results. The alias uses nothing from  $\langle new \ name \rangle$ , so the changes never go into effect. Basically, do *not* change an alias page style directly; if you need to change an alias style, then first overwrite it (using \copypagestyle) with a style you would like to use as a base.

Remark. Note that all three macros will happily overwrite an existing page style without warning.<sup>3</sup>

\* \* \*

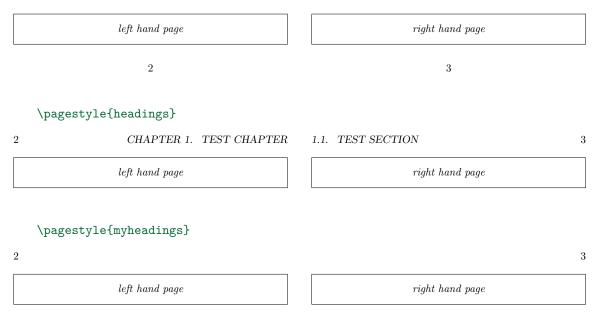
Here is a list of the regular page styles that are provided by *memoir*:

\pagestyle{empty}

left hand page right hand page

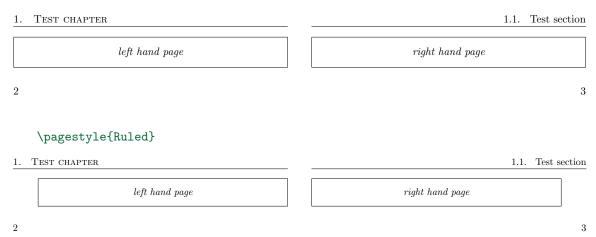
<sup>3.</sup> A handy feature as we will see later.

#### \pagestyle{plain}



myheadings does not automatically write anything to the headers besides the page number. Users can add the text themselves. This style is handy for writing conference proceedings, where one often sets the headers to show the author names and the title of the contributed article.

#### \pagestyle{ruled}



Note how this style protrudes into the outer margin.

```
\setlength{\headwidth}{\textwidth}
\addtolength{\headwidth}{\marginparsep}
\addtolength{\headwidth}{\marginparwidth}
\pagestyle{companion}
```

The companion style mimics the style used in *The LATEX Companion* by Mittlebach et al, [4]. The design of [4] uses very wide outer margins for notes and such.

```
* * *
```

The provided aliases page style in *memoir* are:

```
chapter
                        plain
                                                  title
                                                              plain
                     → plain
                                            titlingpage
                                                              empty
                                                 book
         afterpart
                    → empty
                                                              empty
          cleared
                                             afterbook
                    → empty
                                                              empty
indextitlepagestyle
                        chapter
```

The after... styles are the back side of the part and book title pages, see [1]. The indextitlepagestyle has been added in order to make it easy to create very special effects in the index; see for example the index of [3]. title is the page style issued by \maketitle whereas titlingpage is the page style for the *first* and *last* page of the titlingpage environment.

# 2.3 Setting up the design of a page style

Designing a page style is a two-step process. First there is the visual design, and second there the preparation of macros that provide the information that goes in the headers and footers. In this section we will look at the design part.

The main macros for dealing with the design of the headers and footers are:

The first four macros are easy to understand. They refer to the headers and footers, where one can place material to the left, in the center, or to the right. For example, to create a header which displays titles from the (sub-,subsub-)section in the header for right hand (odd) pages, one could use

```
\makeoddhead{mystyle}{\itshape\rightmark}{}{\thepage}
```

One simply specifies the style one wants to change, and then specifies the contents for left, center, and right for that particular part. Traditionally, for a design that supports chapters, one has the chapter title sent off to the \leftmark, whereas all other titles would be sent off to \rightmark. In this manner, a widely used setup is:

```
\makeoddhead{mystyle}{\itshape\rightmark}{}{\thepage}
\makeevenhead{mystyle}{\thepage}{}{\itshape\rightmark}
```

The standard headings is like this; it just uses \slshape instead of \itshape.

To add lines we use either \makeheadrule or \makefootrule. In most cases the  $\langle width \rangle$  will be equal to \textwidth and for the  $\langle thickness \rangle$  one can use the value set by \normalrulethickness (usually 0.4pt), which matches most other rules set by standard LATEX. The  $\langle skip \rangle$  part will usually be just \footruleskip, see [1].

As can be seen with the Ruled and companion page styles, one can also create styles that protrude into the outer margins; these can be set using  $\mbox{makerunning-width}{\langle style \rangle} {\langle width \rangle}$  and  $\mbox{makeheadposition}{\langle style \rangle} {\langle eheadpos \rangle} {\langle oheadpos \rangle} {\langle oheadpos \rangle} {\langle oheadpos \rangle} {\langle oheadpos \rangle}$  as explained in [1]. Users who would like to use these features are encouraged to have a look in [1] and inside the *memoir* source code (memoir.cls) to see how these macros work.

# 2.4 Setting up content providers

As mentioned earlier all sectional macros (\chapter, \section, etc.) have the ability to make their title available for the page styles via \chaptermark{\langle text\rangle},

\sectionmark{\langle text\rangle}, etc. which are built into the sectional macros. In addition, *memoir* also adds some simple mark macros that are associated with other constructions that may have their own special headers. These include the table of contents (\tocmark), list of figures/tables (\lofmark), the index (\indexmark) and the bibliography (\bibmark).<sup>4</sup>

The *memoir* class includes an extra function one can use to redefine what the sectional and plain marks should do.

```
\mbox{makepsmarks} {\langle style \rangle} {\langle code \rangle}
```

The  $\langle code \rangle$  will be executed when ever the  $\langle style \rangle$  is activated.

\* \* \*

It has always been hard to create generally applicable sectional marks. One needs to take into account:

- If sectional numbering for this level is switched off, then no sectional number should be printed in the content provided for \leftmark and \rightmark.
- 2. Outside the main matter numbers should never be added.
- 3. One might want to add some sort of formatting to the number when it is printed, such as adding the word »chapter« in front of the chapter number.

Because of this, a suitable mark for chapters might look like this:<sup>5</sup>

```
\renewcommand\chaptermark[1]{%
  \markboth{\memUChead{%}
  \ifnum \c@secnumdepth >\m@ne
  \if@mainmatter
  \@chapapp\ \thechapter. \ %
  \fi
  \fi
  #1}{{}}%
```

How on earth would any novice (or even experienced) user be able to figure this out?

<sup>4.</sup> Using the \newlistof also create a new simple mark.

By observing that more or less 90% of all users want dynamic contents within a quite short list of possibilities, we have added some new macros to *memoir* 2008:

```
\createplainmark{\langle type \rangle} {\langle marks \rangle} {\langle text \rangle} \\ \createmark{\langle sec \rangle} {\langle marks \rangle} {\langle show \rangle} {\langle prefix \rangle} {\langle postfix \rangle} \\ \addtopsmarks{\langle pagestyle \rangle} {\langle prepend \rangle} {\langle append \rangle} \\ \nouppercasemarks \\ \nouppercasemarks
```

\createplainmark is used to create the plain marks, for example to create a suitable mark for the TOC, one can use

```
\createplainmark{toc}{both}{\contentsname}
```

which would automatically do the same as the more complicated

```
\renewcommand\tocmark{%
  \markboth{\memUChead{\contentsname}}}{\memUChead{\contentsname}}}}
```

\createplainmark is a lot easier to understand. The  $\langle type \rangle$  refers to one of toc, lot, lof, bib, index and glossary with obvious meanings.<sup>6</sup>

 $\langle marks \rangle$  has to be of of »both« (meaning  $\langle text \rangle$  is added to both the \leftmark and the \rightmark), »left« for just adding to the \leftmark (\markboth{\langle text \rangle}{}) and »right« for just added to \rightmark (via \markright{\left\( text \right)}). In general you would want to always use both for plain marks.

The macro \memUChead, used internally, is a *memoir* macro that decides whether to convert the  $\langle text \rangle$  in to upper case. The default definition of \memUChead is \MakeUppercase. One can redefine it as one likes. Though usually one would just issue \nouppercaceheads to disable \memUChead (i.e. redefine it to doing nothing), alternatively \uppercaseheads will make the  $\langle text \rangle$  appear in uppercase. To remove the upper case part in a page style it is natural to add \nouppercaceheads to the start of  $\langle code \rangle$  in \makepsmarks.

REMARK. One may wonder why we do not just add the uppercase stuff to the styling for the header? This has something to do with expansion; it has turned out to be better to add it at the marks stage.

\* \* \*

<sup>6.</sup> Any use of \newlistof will add an extra plain mark.

<sup>7.</sup> Otherwise a long bibliography might be missing a header on even pages.

Setting up the regular plain marks is now as simple as:

```
\createplainmark{toc} {both}{\contentsname}
\createplainmark{lof} {both}{\listfigurename}
\createplainmark{lot} {both}{\listtablename}
\createplainmark{bib} {both}{\bibname}
\createplainmark{index} {both}{\indexname}
\createplainmark{glossary}{both}{\glossaryname}
```

The sectional marks are a little more complicated. Let us first look at an example. The following code provides the *memoir* standard mark for chapters.<sup>8</sup>

```
\createmark{chapter}{left}{shownumber}{\@chapapp\ }{. \ }
```

Where \@chapapp is a magic macro defined as

So by using \chapapp we do not have to change the page style when we enter the appendix area.

For \createmark the  $\langle sec \rangle$  should be one of chapter, section, subsection or subsubsection. Whereas  $\langle marks \rangle$  is the same as with \createplainmark.

 $\langle show \rangle$  has to be either shownumber or nonumber; the effect will be discussed shortly.

The content to be provided to the page style by the sectional mark when set up via \createmark is determined according to this formula:<sup>10</sup>

<sup>8.</sup> Though I recommend using both instead of left.

<sup>9.</sup> Similar sectional macros like part, can also be used.

<sup>10.</sup> Here sectional level corresponds to the secnumdepth setting.

```
if \langle show \rangle equals shownumber if current sectional level provides sectional numbers if within main matter \langle prefix \rangle \langle sectional\ number \rangle \langle postfix \rangle end if end if \langle the\ provided\ title \rangle
```

By using these new macros, the style marks for the headings style can now be written

Wasn't that simple? It is easy to write and easy to understand—a clear improvement over earlier methods.

REMARK. What is up with the  $\langle show \rangle$  option? What is this good for? It has been added to enable users who have, say, subsection numbers activated, but who do not want the subsection number to appear in the header. They should just use nonumber.

The last new macro,  $\addtopsmarks{\langle pagestyle \rangle}{\langle prepend \rangle}{\langle append \rangle}$  can be used to extend a given  $\addtopsmarks{\langle style \rangle}$ . The prime example is to extend, say, headings to also include marks for sub- and subsubsection.

```
\addtopsmarks{headings}{}{
  \createmark{subsection} {right}{shownumber}{}{. \ }
  \createmark{subsubsection}{right}{shownumber}{}{. \ }
}
```

## 2.5 An example

As a final example let us create a style like the <u>ruled</u> style from scratch. We would like to have the text in the center in both the header and footer.



#### 2.6 Conclusions

In section 1.4 on page 4 we listed some challenges; here are our conclusions to those challenges:

ad (1): The automatic upper casing feature has been factored out. Via \createnact \createn

will internally use \memUChead as a wrapper macro around the text to be handed to the headers. \memUChead can be defined to use \MakeUppercase (the default) using \uppercaseheads or redefined to doing nothing via \nouppercaseheads. You could even redefine \memUChead to something completely different.

- ad (2): In *memoir*, these settings have been separated out; and they will be set using plain mark macros such as \tocmark, \bibmark and \indexmark, all of which can now easily be set using \createplainmark.
- ad (3): In *memoir*, \cleardoublepage (and similar macros) have been designed to issue the cleared page style on *blank* pages. This style *alias* initially points to empty but can be redefined to whatever the user wants it to be.
- ad (4): The look of the headers and footers can easily be redefined using the *memoir* interface presented in section 2.3 on page 8.
- ad (5): For the vast majority of all users the \createmark macro will provide all the flexibility users will ever need.

#### 3 Scenarios

In this section we will list some (possible) real life scenarios and their solutions.

Scenario 1. The headings style is ok, but we also want sub- and subsubsection titles in the headers, and please drop the all upper case thing.

No problem.

```
\addtopsmarks{headings}{%
     \nouppercaseheads % added at the beginning
   }{%
     \createmark{subsection}
                                 {right}{shownumber}{}{. \space}
     \createmark{subsubsection}{right}{shownumber}{}{. \space}
   }
   % use the new settings
   \pagestyle{headings}
   \setsecnumdepth{subsubsection} % activating subsubsec numbering in doc
2
                        Chapter 1. Test chapter
                                              1.1.1.1. Test subsubsection
                                                                                        3
                left hand page
                                                              right hand page
```

Scenario 2. Requirements state that if a possible 'blank' page occurs before a new chapter, it should be in the normal page style.

Assuming that headings is the style used, write:

```
\aliaspagestyle{cleared}{headings}
```

2

Scenario 3. Create a style where the header is flushed towards the outer edge of the text block, containing the header information. Do the same for the footer which should contain the page number. Additionally, all other pages styles used should have their footer set in the same manner.

The page style itself is straightforward; the 'hard' part is the requirement on the other used styles. But wait; in the standard setup all auxillary page styles that use page numbers are all aliases to plain or are the plain style itself, so it suffices to alter plain. To save a bit of space in this article we will base the new page style on headings and just use the marks that come with headings; insert your own replacements.

```
\copypagestyle{outer}{headings}
\makeoddhead{outer}{}{\slshape\rightmark}
\makeevenhead{outer}{\slshape\leftmark}{}{
\makeoddfoot{outer}{}{\thepage}
\makeevenfoot{outer}{{\thepage}}{}{}

% fix plain
\copypagestyle{plain}{outer} % overwrite plain with outer
\makeoddhead{plain}{}{} % remove right header
\makeevenhead{plain}{}{} % remove left header
\pagestyle{outer}

CHAPTER 1. TEST CHAPTER

1.1. TEST SECTION

left hand page

right hand page
```

3

Scenario 4. On pages with only floats we would like to have no headers or footers.

Here *memoir* has a trick up its sleeve: \mergepagefloatstyle; see [1], page 174, again assuming headings as the regular style used.

```
\mergepagefloatstyle{mergedstyle}{headings}{empty}
\pagestyle{mergedstyle}
```

Scenario 5. The look of headings is ok, but please remove the section numbers from the header.

```
\addtopsmarks{headings}{}{
  \createmark{section} {right}{nonumber}{}{}
  \createmark{subsection} {right}{nonumber}{}{}
  \createmark{subsection}{right}{nonumber}{}{}
  \createmark{subsubsection}{right}{nonumber}{}{}
}

pagestyle{headings}

CHAPTER 1. TEST CHAPTER TEST SUBSUBSECTION 3
```

Scenario 6. Add a revision number to all pages.

There are several ways to do this; the easiest is to use the eso-pic package and use it to place the revision information onto the background. But we can also solve it using page styles. This requires creating a new page style (or modifying an existing one) and a rebuild of plain. The construction can be combined easily with other constructions to extract Subversion headers; see [2]. We will place the revision information below the footer to the left. We will modify headings but will show plain pages, so as to show the placement relative to the footer.

```
\newcommand\AddRevision{%
   \setlength\unitlength{1mm}
   \begin{picture}(0,0)
   \put(0,-7){\footnotesize\itshape Revision 5, compiled \today}
   \end{picture}}
\makeoddfoot{\headings} {\AddRevision}{\footnotesize\itshape Revision 5, compiled \today}
   \end{picture}}
\makeoddfoot{\headings} {\AddRevision}{\footnotesize\itshape Revision 5, compiled \today}
\makeoddfoot{\headings} {\footnotesize\itshape AddRevision}{\hat{\headings}} {\hat{\headings}} {\hat{\headings
```

Revision 5, compiled July 30, 2008 Revision 5, compiled July 30, 2008

This could be extended in such a way that if, say, all chapters are in files of their own, then revision data for each separate chapter can be written at the bottom of the first page of each chapter. This is simply done by altering the chapter style, as above.

A colleague used the trick of using page styles to add other contents to the document, to implement a LATEX version of our university letter style. It adds a colophon on the first page of a letter.

Scenario 7. Add a line under the header.

Scenario 8. Remove the »Chapter« from the headings style.

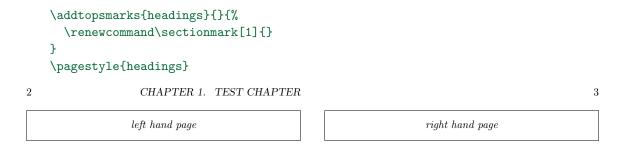
```
\addtopsmarks{headings}{}{
\createmark{chapter}{both}{shownumber}{}{. \space}
}
\pagestyle{headings}

1. TEST CHAPTER 1.1. TEST SECTION 3

left hand page right hand page
```

Scenario 9. Remove the marks set by \section.

This is a quite unusual request, so there is no nice interface for it. The easiest solution is



Scenario 10. I'd like to have a »page / total pages« footer. How do I implement that?

In *memoir* we record two *total* numbers: the total number of sheets in the document, and the page number of the very last page. These are available via \thelastsheet and \thelastpage. Note that they are generally not the same, as the page number is usually reset to 1 at the beginning of the main matter. Let's change plain to solve the scenario:

\makeevenfoot{plain}{}{\thepage\ / \thelastpage}{}
\makeoddfoot {plain}{}{\thepage\ / \thelastpage}{}
\pagestyle{plain}

## References

- [1] Peter Wilson, *The Memoir Class for Configurable Typesetting User Guide*, seventh edition, The Herries Press, 2008.
- [2] PracTEX Journal, issue 2007-3. Available at http://www.tug.org/pracjourn/2007-3/index.html
- [3] Lars Madsen, *Introduktion til LaTEX*, preliminary version of the third edition, 2008. Available via http://www.imf.au.dk/system/latex/bog/.
- [4] Frank Mittelbach and Michel Goossens, *The LATEX Companion*, Addison-Wesley, 2nd edition, 2004. ISBN 0-201-36299-6. With Johannes Braams, David Carlisle and Chris Rowley and contributions by Christine Detig og Joachim Schrod.