Editorial Notes for \LaTeX\*

Michael Kohlhase
Computer Science, Jacobs University
http://kwarc.info/kohlhase
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Abstract
This package defines a couple of editorial notes that simplify collaboration on a \LaTeX\ text. These allow authors to annotate status information in the source. In draft mode, the annotations are shown for communication, and in publication mode these are suppressed.

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1 Introduction

When collaborating on a document with multiple authors, communication about the status of a given passage and intentions about what to do with it, indications about issues still need to be resolved, and directives to other authors, e.g. calling for help, or passing the baton, etc. make up much of the overhead involved in collaboration. In particular, many of the necessary communicative acts are centered around specific points or passages in the document at hand. Therefore it is natural to embed the communicative acts in the document source itself. The simplest version of this is to special markers like “(***(remember to rework this before publication ***))”, where the markers “(***” and “***)” serve as a visual aid and target for search and navigation tools in the editor. Of course this is dangerous, and we have all seen published texts with such markers still present.

The \LaTeX package described in here systematizes the idea and provides more conspicuous visual markers (as footnotes and margin notes) and a way of making all of these private markers and comments invisible for publication or outside communication.

2 The User Interface

2.1 Package Options

As usual in \LaTeX, the package is loaded by \texttt{\usepackage[⟨options⟩]{ed}}, where [⟨options⟩] is optional and gives a comma separated list of options. The \texttt{ed} package takes the options \texttt{show} and \texttt{hide}, where \texttt{hide} is the default case, so that \texttt{\usepackage{ed}}, is equivalent to \texttt{\usepackage[hide]{ed}}. If the \texttt{show} option is given, then the editorial notes are presented as special annotations to the document, otherwise they are completely invisible — if you take care about spaces in the source code. For instance \texttt{\text{\text{\text{text}}\ednote{....}\text{\text{\text{text}}}}} will fool \TeX’s whitespace-collapsing algorithm and bring it to output two spaces in the document instead of just one as expected \texttt{\text{\text{\text{text}}}\ednote{....}\text{\text{\text{text}}}} should be used instead! This \texttt{hide} option useful for preparing “clean” version for outside consumption without losing the management metadata. In some situations the \texttt{\marginpar} decorations generated by editorial notes are disallowed, for these situations the \texttt{ed} package has the \texttt{nomargins} option that disables them.

As many classes support the \texttt{draft} and \texttt{final} options and pass them on to all loaded packages that will take them, the \texttt{ed} package supports them as aliases for \texttt{show} and \texttt{hide}.

2.2 Annotation Macros

The main user macro of this package is \texttt{\ednote}. It is used say what you have done or what should still be done at a given point in the document. \texttt{ed.sty} formats it like a footnote, but with a margin note that marks the place in the text, where the note is located. Otherwise, in the presence of multiple \texttt{\ednotes} in a page it may be difficult to find the referenced locations\footnote{EdNote: this is an example of an ednote}. Editorial notes are numbered and marked in the margin for easy recognition. \texttt{\ednote} also takes an optional argument that is an identifier. This allows to cross-reference ednotes in each other.

The \texttt{\edissue} macro\footnote{Issue: The control sequence \texttt{\issue} conflicts with many other macro packages, maybe we should rename it to \texttt{\edissue}.} is a variant of \texttt{\ednote} for issues that still have to be discussed among the authors. For issues the labeling and cross-referencing in the optional argument is especially useful. Note that the \texttt{\issue} macro which earlier versions of the \texttt{ed} package provided is deprecated in favor of \texttt{\edissue}. The old \texttt{\issue} macro is only provided for backwards compatibility if it is not defined by other packages. For this to work, the \texttt{ed} package should be loaded late in the preamble.

The \texttt{\tweak} macro\footnote{Tweak: this is an example of a tweak} is a variant of \texttt{\ednote} for marking places where we have tweaked something (apart from the standard way we usually use).

The \texttt{\todo} environment is an environment that can be used to mark up writing tasks. These

\footnotesize
\begin{tabular}{ll}
1 & EdNote: this is an example of an ednote \\
2 & Issue: The control sequence \texttt{\issue} conflicts with many other macro packages, maybe we should rename it to \texttt{\edissue}. \\
3 & Tweak: this is an example of a tweak \\
\end{tabular}
are inserted into the text in a different font, so that they are conspicuous as a foreign part, and take an argument for a comment.

The todolist is a variant of the todo environment which is a is an itemized list.

The following is an example, generated from the input \begin{todolist}{an example todolist}
\item lots of good examples
\item a general chapter about best practices
\end{todolist}

The following stub

\begin{edstub}{stub.doc}
\verb|here are some provisional ideas| is generated by
\end{edstub}

For hyperlinking \verb|file| the edstubURI can be used to set a URI: After setting \verb|edstubURI\{(URI)\}\} with a non-empty URI, \verb|file| is hyperlinked to \verb|(URI)/file|\}. If \verb|file| is in the same directory as the current document, use \verb|edstubURI\{.\}|.

2.4 Generating Statistics and Explanations

Up to version 1.6, the ed package had an explicit macro \verb|ednotemessage| that put just before the \verb|end\{document\}| will generates a message with cardinality information for the ednotes into the log file. This macro is now deprecated, since the message is now automatically generated.

The edexplanation macro generates an explanation of the best practices into the document. So that if you introduce collaboration partners to the ed package, you can give them an explanation “in-place”.
2.5 Configuration
\texttt{\textbackslash ednoteshape}  The font shape of editorial annotations is governed by the parameter \texttt{\textbackslash ednoteshape} the default is sans serif, specialize it to say italic by \texttt{\textbackslash def\textbackslash ednoteshape\{\textbackslash it\}}. The labels in the margins can be tweaked (e.g. for localization:) by setting the (internal) macros \texttt{\textbackslash ednote\textbackslash label}, \texttt{\textbackslash tweak\textbackslash label}, \texttt{\textbackslash edissue\textbackslash label}, \texttt{\textbackslash b\textbackslash todo\textbackslash label}, \texttt{\textbackslash e\textbackslash todo\textbackslash label}.

2.6 Best Practices
In a situation with multiple authors, we it is advisable to use the \texttt{\textbackslash ednote} in the following form: \texttt{\textbackslash ednote\{author: some explanatory text\}} to specify the originator of the note.
3 The Implementation

The implementation is rather standard. We first set up the options for the package.

3.1 Package Options

The main switch is \showednotes, which governs the visibility of the annotations.

\newif\ifsowednotes\sowednotesfalse
\newif\ifmargins\marginstrue

The next step is to declare the package options, they just set \showednotes switch accordingly.

\DeclareOption{show}{\sowednotestrue\message{ed.sty: showing ednotes}}
\DeclareOption{hide}{\sowednotesfalse\message{ed.sty: hiding ednotes}}
\DeclareOption{draft}{\sowednotestrue\message{ed.sty: showing ednotes}}
\DeclareOption{final}{\sowednotesfalse\message{ed.sty: hiding ednotes}}
\DeclareOption{nomargins}{\marginsfalse}
\ProcessOptions

The next step is to load the verbatim or paralist packages, so that we can either comment out the or use the compactenum environment for todo lists.

\ifshowednotes
\RequirePackage{paralist}
\RequirePackage{xcolor}
\else
\RequirePackage{verbatim}
\fi

This ends the package setup code, so we can come to the implementation of the functionality of the package.

3.2 Annotation Macros

\ednoteshape We start with the configuration part, predefining \ednoteshape to be sans serif.
\newcommand\ednoteshape{\sffamily}

The next step is to set up a counter for the editorial annotations
\newcounter{ednote}

\ed@foot The internal macro \ed@foot is used to actually make the annotations, it is used by the interface macros to give the annotations. It takes three arguments: A comment text that goes into the footnote, a type descriptor, and an identifiers.
\newcommand\ed@foot[3]{\def\@test{#3}\footnotetext{\arabic{ednote}\if\@test\@empty\else\label{ed:#3}\[{#3}\]\fi: \ednoteshape #1}}

\ed@footnote extends the \ed@foot to a complete footnote
\newcommand\ed@footnote[3]{\footnotemark[\arabic{ednote}]\ed@foot{#1}{#2}{#3}}

\ed@margin The internal macro \ed@margin makes a \marginpar annotation if allowed.
\newcommand\ed@margin[1]{\ifmargins\marginpar{#1}\fi}

\Ed@note Another internal macro \Ed@note adds label management to \ed@foot
\newcommand\Ed@note[3]{\addtocounter{ednote}{1}\message{#2!}\ifshowednotes\ed@footnote{#1}{#2}{#3}\fi}
\ednote \ed@note is a variant of \Ed@note that also makes an identifying mark in the margin.

26 \newcommand\ed@note[4]{\text, type, label, margin
27 \{\Ed@note[#1]{#2}{#3}{#4: \arabic{ednote}}\}fi}

\ednotelabel

28 \newcommand\ednote@label{EdNote}
29 \newcommand\ednote@margin{EdN}
30 \newcommand\ednote@label[1]{\def\ednote@label{#1}}
31 \newcommand\ednote@margin[1]{\def\ednote@margin{#1}}

\ednote with the \Ed@note and \ed@note macros it is very simple to get the desired functionality of \Ednote and \ednote:
32 \newcommand\Ednote[2][]{\Ed@note{#2}\ednote@label{#1}}
33 \newcommand\ednote[2][]{\ed@note{#2}\ednote@label{#1}\ednote@margin}

\tweaklabel

34 \newcommand\tweaklabel[1]{\def\tweak@label{#1}}
35 \newcommand\tweaklabel[1]{\def\tweakmargin{#1}}
36 \newcommand\tweaklabel[1]{\def\tweakmargin{#1}}
37 \newcommand\tweakmargin[1]{\def\tweakmargin{#1}}

\tweak and of course for \tweak:
38 \newcommand\tweak[2][]{\ed@note{#2}\tweak@label{#1}\tweak@margin}
39 \newcommand\Tweak[2][]{\Ed@note{#2}\tweak@label{#1}}

\edissuelabel

40 \newcommand\edissue@label{Issue}
41 \newcommand\edissuelabel[1]{\def\edissue@label{#1}}
42 \newcommand\edissue@margin{Is}
43 \newcommand\edissuemargin[1]{\def\edissue@margin{#1}}

\edissue

44 \providecommand\issue[2][]{\ed@note{#2}\edissue@label{#1}\edissue@margin}
45 \providecommand\issue[2][]{\Ed@note{#2}\edissue@label{#1}}
46 \newcommand\edissue[2][]{\ed@note{#2}\edissue@label{#1}\edissue@margin}
47 \newcommand\edissue[2][]{\Ed@note{#2}\edissue@label{#1}\edissue@margin}

Ed\part For the text status environments Newpart and Oldpart we also set up an internal macro that does the work.
48 \newenvironment{Ed\part}[3]{% text, mess, start
49 \{\addtocounter{ednote}{1}\edef\newnumber{\theednote}\message{#2! \newnumber}\}
50 \ifseshednotes\ed@foot{#1}{#2}[{fi]\fi}
51 \}

ed\part and one that makes the marginpars.
52 \edef\ed\part[#1]{#2}\ed\part[3]{#4}{#2}% text, mess, start, margin
53 \{\Ed\part[#1]{#2}{#3}\ed\part[4]{#4}{#2}\ed\part[4]{#4}{#2}\ed\part[4]{#4}{#2}\ed\part[4]{#4}{#2}\ed\part[4]{#4}{#2}}
54 \edef\ended\part[1]{\endEd\part}\ifseshednotes\ed\part[4]{#1}{#2}[{fi}\fi}

newpartlabels

55 \newcommand\b@newpart\label{BegNP}\ed\part[1]{#2}{#2}{#2}{#2}\ifseshednotes\ed\part[4]{#1}{#2}[{fi}\fi}
56 \newcommand\b@newpart\margin{BNP}\ed\part[1]{#2}{#2}{#2}{#2}\ifseshednotes\ed\part[4]{#1}{#2}[{fi}\fi}
57 \newcommand\newpartmargins[2]{\def\b@newpart\margin{#1}\def\e@newpart\margin{#2}}

newpart We instantiate it for the newpart environment
58 \newenvironment{newpart}[1]{\Ed\part[#1]{New Part}\b@newpart\label{#2}\b@newpart\margin{#1}\e@newpart\margin{#2}}
59 \newenvironment{newpart}[1]{\Ed\part[#1]{New Part}\b@newpart\label{#2}\b@newpart\margin{#1}\e@newpart\margin{#2}}
oldpartlabels
60 \newcommand\oldpartlabels[2]{{\texttt{\textbackslash b@oldpart@label{#1}\texttt{\textbackslash e@oldpart@label{#2}}}}}
61 \newcommand\oldpartmargins[2]{{\texttt{\textbackslash b@oldpart@margin{#1}\texttt{\textbackslash e@oldpart@margin{#2}}}}}
62 \newcommand\b@oldpart@label{BegOP}\newcommand\e@oldpart@label{EndOP}
63 \newcommand\b@oldpart@margin{BOP}\newcommand\e@oldpart@margin{EOP}

oldpart and of course for the oldpart environment
64 \newenvironment\Oldpart[1]{\Ed@part{#1}{Old Part}\b@oldpart@label\ifshowednotes\color{gray}\fi}{\endEd@part}
65 \newenvironment\oldpart[1]{\ed@part{#1}{Old Part}\b@oldpart@label\b@oldpart@margin\ifshowednotes\color{gray}\fi}{\ended@part\e@oldpart@margin\ifshowednotes\egroup\else\endcomment\fi}


todolabel
70 \newcommand\todolabels[2]{{\texttt{\textbackslash b@todo@label{#1}\texttt{\textbackslash e@todo@label{#2}}}}}
71 \newcommand\todomargins[2]{{\texttt{\textbackslash b@todo@margin{#1}\texttt{\textbackslash e@todo@margin{#2}}}}}
72 \newcommand\b@todo@label{ToDo}\newcommand\e@todo@label{Done}
73 \newcommand\b@todo@margin{ToDo}\newcommand\e@todo@margin{Done}

todo
74 How we define the todo environment depends on the \texttt{\textbackslash showednotes} switch (or the package option). If we hide annotations, todo is set to \texttt{comment} from the \texttt{comment} package, otherwise the body is set in sans serif font for emphasis.
75 \newenvironment\Todo[1]{\Ed@part{#1}{To Do}\b@todo@label\ifshowednotes\bgroup\ednoteshape\else\comment\fi}{\endEd@part\e@todo@label\ifshowednotes\egroup\else\endcomment\fi}
76 \newenvironment\todo[1]{\ed@part{#1}{To Do}\b@todo@label\b@todo@margin\ifshowednotes\bgroup\ednoteshape\else\comment\fi}{\ended@part\e@todo@margin\ifshowednotes\egroup\else\endcomment\fi}

todolist
78 How we define the todolist environment depends on the \texttt{\textbackslash showednotes} switch (or the package option). If we hide annotations, todolist is set to \texttt{comment} from the \texttt{comment} package, otherwise it is set to an itemize.
79 \newenvironment\Todolist[1]{{\ednoteshape To Do: \texttt{#1}}\begin{compactenum}}{\end{compactenum}}
80 \newenvironment\todolist[1]{\ifshowednotes\ed\margin{{\ednoteshape ToDo}}\Todolist{#1}\fi}{\Todolist}

musings
87 \newenvironment\musings{{\texttt{\textbackslash showednotes\color{blue}}}\fi}{\}}
\edstubURI
88 \def\ed@stubURI{}
89 \newcommand\edstuURI[1]{{\texttt{\textbackslash gdef\texttt{\textbackslash ed@stubURI}{\texttt{#1}}}}}

3.3 Stubs and External Files

edstub
90 \newif\ifhref\hreffalse
91 \AtBeginDocument{\ifPackageLoaded{\texttt{hyperref}}{\hrefftrue}{\hreffalse}}
92 \newenvironment\edstub[2][]{\def\test{#1}\begin{center}{\huge\color{red}}}{\ifx\test\empty\Text The following blue text else \texttt{#1} \fi is only a provisional stub\\Large the Office document}
3.4 Generating Statistics and Explanations

\begin{ednotemessage}
The \texttt{\@ednotemessage} makes use of the counter \texttt{ednote} and generates a message.
\end{ednotemessage}

\begin{verbatim}
\newcommand\@ednotemessage{\ifnum\value{ednote}>0\typeout{}%
\typeout{There are still \arabic{ednote} EdNotes, New/Oldparts, and Issues to resolve!}%
\typeout{}%}
\AtEndDocument{\@ednotemessage}
\end{verbatim}

\begin{ednotemessage}
The old \texttt{\@ednotemessage} is now deprecated
\end{ednotemessage}

\begin{verbatim}
\newcommand\ednotemessage{\PackageWarning{ed}{The 'ednotemessage' macro is obsolete, the message
is generated automatically now.}}
\end{verbatim}

\begin{edexplanation}
The \texttt{\@edexplanation} macro makes use of the todolist environment.
\end{edexplanation}

\begin{verbatim}
\newcommand\edexplanation\{\todolist{we will use the ednote system to communicate}
\item use the \texttt{\char92ednote\char123author: some explanatory text\char125}}
like a footnote to say what you have done or what should still be
done\ednote{MiKo: this is an example of an ednote}. Ednotes are numbered and
marked in the margin for easy recognition.
\item use the \texttt{\char92issue\char123author: explanation of the
issue\char125}} variant of ednote for issues\issue{this is an example of
an issue} that still have to be discussed.
\item finally, the \texttt{\char92newpart\char125} environment is a list environment that can be
used to mark up todo lists. This explanation is an example of a todo list, it
is inserted into the text in a different font.
\item putting the macro \texttt{\char92ednotemessage}} just before the
\texttt{\char92end\char123document\char125}} will generate a message with
cardinality information for the ednotes into the log file.
\item all of these text decorations and meta-annotations are only inserted into
the text, if the \texttt{\char92show} package option in the \texttt{\char92usepackage}}
directive in the preamble of the document is set: \texttt{\char92usepackage[show]\char123ed\char125}} will show the decorations, while
\texttt{\char92usepackage[show]\char123ed\char125}} will not. This is useful for
preparing 'clean' version for outside consumption without loosing the
management metadata.
\end{verbatim}

\begin{verbatim}
\end{edexplanation}
\end{verbatim}
Change History

v1.0
  General: First Version with Documentation  1
v1.1
  General: Added capitalized variants      1
v1.2
  General: adding todo environment        1
v1.3
  General: rationalizing todo environment  1
v1.4
  General: localization                   1
v1.5
  General: todolist now uses enumerate     1
v1.6
  General: deprecated issue for edissue to get
      around name clashes.                  1
  made ednotemessage automatic            1
  nomargins option                        1
v1.7
  General: adding final/draft options      1