# Welcome to MacTeX

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Welcome to MacTEX
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# What You Can Do with MacTFX

MacT<sub>E</sub>X is an OS X install package providing a completely configured and ready-to-use version of T<sub>E</sub>X Live. Produced by T<sub>E</sub>X User Groups worldwide, T<sub>E</sub>X Live consists of the T<sub>E</sub>X typesetting system and friends such as ET<sub>E</sub>X, X<sub>E</sub>T<sub>E</sub>X and LuaT<sub>E</sub>X. T<sub>E</sub>X Live enables you to create any variety of documents<sup>1</sup>, from wedding invitations to books. You work with an editor such as T<sub>E</sub>XShop or a graphical user interface program such as LyX.

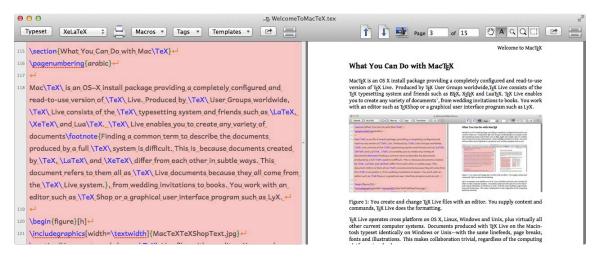


Figure 1: You create and change  $T_EX$  Live files with an editor. You supply content and commands.  $T_EX$  Live does the formatting.

TEX Live operates cross platform on OS X, Linux, Windows and Unix, plus virtually all other current computer systems. Documents produced with TEX Live on the Macintosh typeset identically on Windows or Unix—with the same linefeeds, page breaks, fonts and illustrations. This makes collaboration trivial, regardless of the computing platforms involved.

What you can do with  $T_EX$  Live depends on your familiarity with its capabilities. You can use  $T_EX$  Live for almost all types of printing and publishing activities—from very simple to extremely detailed:

- $\Rightarrow$  Write a letter or publish a memoir.
- ⇒ Design a poster or create a product catalog.
- ⇒ Generate a brochure or produce a textbook.
- ⇒ Construct a newsletter or fashion an annual report.

You can print your output or package it as a PDF or publish it as HTML. In fact, you can do almost anything with T<sub>F</sub>X Live—from a publishing point of view.

 $<sup>^{1}</sup>$ Finding a common term to describe the documents produced by a full T<sub>E</sub>X system is difficult. This is because documents created by T<sub>E</sub>X, ET<sub>E</sub>X and X<sub> $\overline{1}$ </sub>T<sub>E</sub>X differ from each other in subtle ways. This document refers to them all as T<sub>E</sub>X Live documents because they all come from the T<sub>E</sub>X Live system.

#### An Overly Modest View of TFX

TEX—the original ancestor of TEX Live—is a free, multilingual typesetting system designed "for the creation of beautiful books—and especially for books that contain a lot of mathematics." While this understated official description comes from TEX developer Donald E. Knuth, it may make the system sound very specialized. The opposite is true. In addition to beautiful equations, TEX produces the most beautiful text available for general publishing. But, does this really matter in the era of email, tweets and texts? Give it a try. Your love letters, business communications and mathematical treatises may benefit.

#### Word Processors, T<sub>E</sub>X and Formatting

Near the beginning of the personal computer era, developers created word processing. Since then, word processors have gained some text manipulation and page layout abilities. But essentially all 21st Century word processors publish text the same now as then—exactly as you type it. Word processor marketers used to call this *What You See Is What You Get*. They abbreviated it as WYSIWYG and pronounced it as *whiz-e-wig*, or something similar. WYSIWYG works in more or less one way. When you type:

```
Hello. I
love you.
Won't you tell me your name.
```

your obedient software prints everything just as you entered it:

```
Hello. I
love     you.
Won't     you tell     me your
     name?
```

While this may be nice on occasion, suppose you were nervously hurrying and typing poorly. Your output in this circumstance may look like a harassment note instead of a first indication of possible affection. But TFX can take care of that.

Type the exact same thing in TEX Live—with the exact same spacing and line breaks—and you could very easily get:

Hello. I love you. Won't you tell me your name?

<sup>&</sup>lt;sup>2</sup>Donald Ervin Knuth. *The T<sub>E</sub>Xbook*, Volume A of Computers & Typesetting. Addison-Wesley, Reading, Mass., 1986. ISBN 0201134470.

T<sub>E</sub>X Live corrects your spacing—not your spelling—and line breaks. And it uses a beautiful font and color you requested. This is for most purposes much better than WYSI-WYG. Aware of the differences of their system over conventional word processors, T<sub>E</sub>X users sometimes refer to WYSIWYG as WYSIAYG—or *What You See Is All You Get*.

What makes the difference between TFX Live and word processing? Formatting!

#### The Difference Rests in the Formatting

With a word processor, you do the formatting—with its potential inconsistencies. As you word process, you must remember to format everything—every time. From a  $T_EX$  perspective, amazingly efficient software does the formatting and leaves the content to you. You tell  $T_FX$  what you want and it does everything as you like it.

But suppose you want to do all of the formatting? Can you do that with  $T_{\overline{L}}X$ ? Of

```
course
you
can...
```

if you really want to. But  $T_EX$  eases the tasks of formatting, plus it produces beautiful typography.

### Hints of What TEX Live Can Do for You

TeX Live creates beautiful documents according to the commands you use. It comes with hundreds of built-in primitive commands and hundreds of additional ones created by combining primitives into so-called *macros*. A sample macro might combine two primitives—\sl for *slanted text* and \bf for **bold text**—to make a \section command with *slanted bold* text. When you tell TeX Live to format some text using this section heading, the heading takes on the appearance of the command you specify. This same concept applies to every division head, paragraph, sentence, word and character in your document. You provide the instructions. TeX does the formatting.

As a more specific example, a section heading may appear as bold characters, 12 points in size, using Copperplate font with small caps:

#### A HYPOTHETICAL SECTION HEADING

In addition to fonts, the command for a section heading would also define space above and below the text, text alignment and other typographical controls. If you want to alter the appearance of the section heading, you modify its settings. The changes show up everywhere you use the section heading in your document.

But, this just touches the surface because T<sub>F</sub>X Live provides extreme flexibility.

# A Sampler of What TFX Live Does

TeX Live helps make publishing convenient and consistent by controlling almost every aspect of document formatting. This benefits people in everyday life by saving time once you learn TeX Live. As a real-world example, an economics consulting company saved 200 hours of production time each month by switching preparation of its detailed reports from a page publishing program to TeX Live. When thoughtfully implemented, TeX Live can help recover lost time by managing the formatting of your documents. This section provides a sampling of the things TeX Live can do to lighten the formatting load so you can concentrate on content. But first you need to understand some limitations.

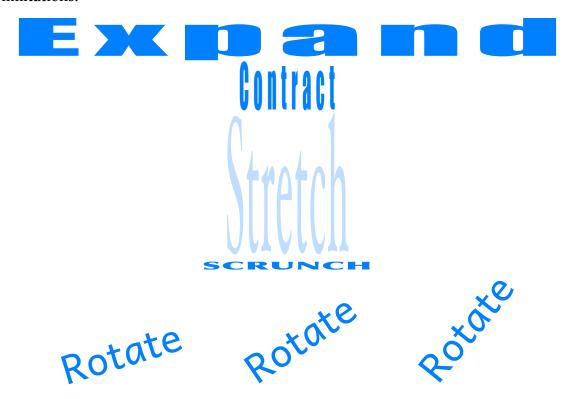


Figure 2: Reshaping words with T<sub>F</sub>X Live.

#### About TEX Live Limitations and Fixes

 $T_{E\!X}$  Live is not all-things-publishing to all people. But its flexibility makes it come close. Consider some limitations of the popular  $E\!T_{E\!X}$  format. A format consists of a structured group of related  $T_{E\!X}$  macros. These macros define everything from page margins to character styles.

LTEX is the primary and most well-known format of TeX. Originally the work of developer Leslie Lamport, LTEX provides macros to easily access most TeX functions, such as

setting up document structures, creating tables of contents, generating indexes and constructing various types of lists. But it also defines document formatting from the viewpoint of one person, the developer. The formatting macros in MEX never work for everyone—unmodified, that is. For example, out-of-box MEX implements multiple columns as one column or two. A new page begins each time you switch between one and two columns. This can produce some genuine pain when designing a document with varying numbers of columns. MEX also defines typographic standards according to the tastes of the developer. While thoughtfully designed, these standards do not meet the needs of everyone.

To address these issues, MEX offers access hooks into its macros for making minor changes. MEX also contains designed-in flexibility for other developers to alter and extend its capabilities and behaviors.

The majority of users bend MEX to their needs by using classes and packages to alter and extend its capabilities.

Classes define structures for document types such as letters, articles, reports and books. Developers can and do create new classes designed to meet their own needs. One such class implements multiple columns with the ability to change the number of columns within a single page.

*Packages* alter and extend classes. Some provide commands to customize text formats. Others add new functions, such as creating hypertext links, making magazine style layouts and customizing headers and footers.

You can find dozens of classes and hundreds of packages on CTAN—the Comprehensive TEX Archive Network—all for free. When you need a specialized capability, there is probably a package waiting to serve your needs.

In summary, while formats such as  $\mathbb{M}_{E}X$  may not provide all design elements you need, classes and packages probably can. Sometimes you may need to search a little to find a class or package to fit your need. Sometimes you may need to create your own format, class, package or macro. You can also modifying existing ones.

#### **Document Structures**

T<sub>E</sub>X Live defines document structures using classes. You can choose from various document styles, including classes for letters, articles, reports and books—the four built-in classes of M<sub>E</sub>X. Classes provide commands for setting up document elements such as title pages, tables of contents, abstracts, acknowledgements, bibliographies and indexes, plus division levels for parts, chapters, sections and paragraphs.

Identical commands usually produce different results across various classes. For instance, section headings look differently in articles and books. Additionally, articles insert no page breaks between their titles, tables of contents and text. Report and

book title pages and tables of contents appear on separate pages. Finally, some common commands are not available in all classes. This applies to document division commands in the letter class, because letters generally need no section headings. However, you can find workarounds to add formatted section headings to letters, if you really need to.

Classes enable flexibility for creating anything from newsletters to technical manuals to annual reports. You can also design your own classes, but doing this requires some expertise.



Figure 3: Having Fun with Reflections.

#### Page Margins, Odd and Even Numbered Pages, Columns

Good page design varies with the purpose of your publication and its means of distribution. For example, the specifications of odd and even numbered pages depend on the final destination of your project. When printing on one side or not printing at all, you may want all pages to look the same. For two-sided printing, you may oppositely offset odd- and even-numbered pages to create binding margins. You may increase white space for margin notes or narrow the margins to reduce the number of printed pages. The amount of text and graphic columns you choose varies with page width and size of graphics.

These considerations and others make page design complex and potentially difficult to manage. TEX Live classes and packages provide commands to make page design easier. Classes specify default margins, page layout and number of columns. You can change these with class options and commands from page-design packages. To make life easier, some packages allow you to specify just the measurements you want to control—left and rights margins, for example—and then automatically adjust all other settings to match the best practices of publishing.

#### Division Levels, Tables of Contents, Indexes

Division levels provide a framework for your publication, making it easier to understand at a glance. A table of contents and an index makes information easier to find, especially in large documents.

Articles prepared in  $T_{E}X$  Live contain three levels of sections plus paragraphs. You can number the division headings or make them unnumbered. You can also number paragraphs. Reports add chapters above the sections. Each chapter automatically starts on a new page, but you can override this. You can also require all chapters to start on either odd-numbered or even-numbered pages. Books provide optional parts in addition to the chapters. Parts automatically start on new pages. You can number pages consecutively throughout your publication, or restart numbering at specified document divisions.

T<sub>E</sub>X Live creates tables of contents from your division headings plus optional additional manual entries. The contents section can also create lists of figures, tables and equations. For large projects you can produce a summary contents at the beginning of the document and detailed contents after the title page of each major division.

With TEX Live you can also make single-level or multiple-level indexes. You can also create multiple indexes with different purposes, for example a topic index and an index of locations.

#### **Cross References and Hyperlinks**

Cross references and hyperlinks make documents easier to navigate. Cross references tell readers where to find information in the current document—see page 2 to read a quote from the original developer of TeX. Hyperlinks create connections to external locations, such as the website of the original developer of TeX.

Cross references can guide your reader to specified tables, figures, equations, sections and pages—all by number. In addition to going to web addresses, hyperlinks can direct readers to other locations inside your document—such as a list of things you can do—when you publish your document as a PDF. When you activate hyperlinks with the hyperref package, the entries in your table of contents, index, footnotes and bibliography automatically become internal hyperlinks.

### Footnotes, Glossaries, Bibliographies

Footnotes, glossaries and bibliographies provide explanations, clarifications and scholarly background information for your documents.

T<sub>E</sub>X Live can generate footnotes or endnotes with document-wide sequential numbers or numbers restarted at division levels. You can format your footnotes to match the requirements of your publication. Once they are formatted, they stay formatted.

Bibliography creation in  $T_EX$  Live provides an extraordinary number of options through formats, classes, packages and styles<sup>3</sup>. Together, these allow you to create and publish a list of resources in any standard style. You can also create one to meet your own needs. You can find existing bibliography styles to match the requirements of almost all academic institutions, professional publications and scholarly journals. Many of these organizations can provide you with their style definition for  $T_EX$  bibliographies. You can manually enter your bibliographic sources into  $T_EX$  source files or create an external database. For an external database, you can manually create your list of sources or use one of the computer-assisted research tools, such as BibDesk—a very helpful application.

 $T_EX$  Live provides commands for creating one or more glossaries. These allow you to create lists of terms and definitions while leaving the formatting to  $T_EX$  Live.

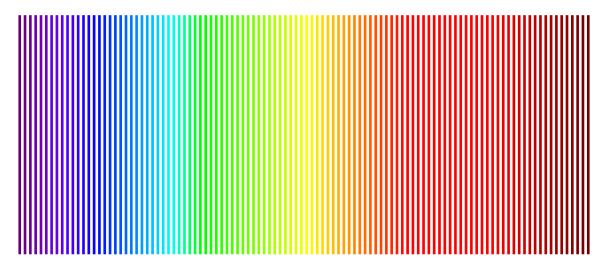


Figure 4: Color Rules by Lightwave Length. See xcolor package for details.

# Floats—Graphics, Tables and Equations

Floats provide flexibility in publishing graphics, tables and equations. Each of these objects goes inside a specialized wrapper called an environment. Environments can move outside the normal flow of text. For example, a table may float to the top of a page, away from its neighboring text but still nearby. Floats can also move to the bottom of a page or simply stay where you originally placed them if you disable their ability to float. In some cases you tell all floats to move to the end of a section. You can then guide readers to your graphics, tables and equations through cross-referencing as described on page 7.

Table floats can contain any type of information including rows and columns of tabular data. Graphics from external sources—such as jpeg images—float in the figure

<sup>&</sup>lt;sup>3</sup>Bibliography styles tells T<sub>F</sub>X Live how to format bibliography entries.

environment. You can scale, crop, position and rotate graphics. With a special type of picture environment you can draw pictures by specifying the sizes and locations of basic objects—lines, circles, arrows and text. Equation floats contain beautifully typeset equations, the primary motivation for the original development of TEX. All floats provide for captions and can appear in the lists below the table of contents.

#### Languages, Fonts, Characters and Unicode

In the beginning,  $T_EX$  could work for any language built around roman characters—A, B, C...—and basic diacriticals—Á, Â, Å.... And it could typeset ligatures—Æ, Œ.... Today,  $T_EX$  Live typesets in almost any language with a TrueType or OpenType font. And it still does diacriticals and ligatures, plus old style numbers, small caps and many other typographical features. It can type Japanese hiragana, katakana and kanji, plus Chinese kanji and other ideographic characters.

T<sub>E</sub>X typesets right-to-left, left-to-right and top-to-bottom.

It also supports languages<sup>4</sup> such as:

0 - 1	Landa a Pa	L. L. Watana	N I . I.	0 - 11-1
Czecn	iceiandic	Luba-Katanga	Nyankole	Swedish
Danish	Igbo	Luo	Oromo	Swiss German
Duala	Indonesian	Luyia	Polish	Taita
Dutch	Irish	Macedonian	Portuguese	Tajik
Embu	Italian	Machame	Romanian	Tasawaq
English	Japanese	Makhuwa-Meetto	Romansh	Teso
Esperanto	Jola-Fonyi	Makonde	Rombo	Tongan
Estonian	Kabuverdianu	Malagasy	Rundi	Turkish
Ewe	Kabyle	Malay	Russian	Turkmen
Ewondo	Kalaallisut	Maltese	Rwa	Ukrainian
Faroese	Kalenjin	Manx	Samburu	Uzbek
Filipino	Kamba	Masai	Sango	Vietnamese
Finnish	Kazakh	Meru	Sangu	Vunjo
French	Kikuyu	Meta'	Sena	Welsh
Fulah	Kinyarwanda	Mongolian	Serbian	Yangben
Galician	Kirghiz	Morisyen	Shambala	Yoruba
Ganda	Koyra Chiini	Mundang	Shona	Zarma
German	Koyraboro Senni	Nama	Slovak	Zulu.
Greek	Kwasio	Ngomba	Slovenian	
Gusii	Langi	North Ndebele	Soga	
Hausa	Latvian	Norwegian Bokmål	Somali	
Hawaiian	Lingala	Norwegian Nynorsk	Spanish	
Hungarian	Lithuanian	Nuer	Swahili	
	Duala Dutch Embu English Esperanto Estonian Ewe Ewondo Faroese Filipino Finnish French Fulah Galician Ganda German Greek Gusii Hausa Hawaiian	Danish Igbo Duala Indonesian Dutch Irish Embu Italian English Japanese Esperanto Jola-Fonyi Estonian Kabuverdianu Ewe Kabyle Ewondo Kalaallisut Faroese Kalenjin Filipino Kamba Finnish Kazakh French Kikuyu Fulah Kinyarwanda Galician Kirghiz Ganda Koyra Chiini German Koyraboro Senni Greek Kwasio Gusii Langi Hausa Latvian Hawaiian Iirish	Danish Igbo Luo Duala Indonesian Luyia Dutch Irish Macedonian Embu Italian Machame English Japanese Makhuwa-Meetto Esperanto Jola-Fonyi Makonde Estonian Kabuverdianu Malagasy Ewe Kabyle Malay Ewondo Kalaallisut Maltese Faroese Kalenjin Manx Filipino Kamba Masai Finnish Kazakh Meru French Kikuyu Meta' Fulah Kinyarwanda Mongolian Galician Kirghiz Morisyen Ganda Koyra Chiini Mundang German Koyraboro Senni Nama Greek Kwasio Ngomba Gusii Langi North Ndebele Hausa Latvian Norwegian Nynorsk	Danish Igbo Luo Oromo Duala Indonesian Luyia Polish Dutch Irish Macedonian Portuguese Embu Italian Machame Romanian English Japanese Makhuwa-Meetto Romansh Esperanto Jola-Fonyi Makonde Rombo Estonian Kabuverdianu Malagasy Rundi Ewe Kabyle Malay Russian Ewondo Kalaallisut Maltese Rwa Faroese Kalenjin Manx Samburu Filipino Kamba Masai Sango Finnish Kazakh Meru Sangu French Kikuyu Meta' Sena Fulah Kinyarwanda Mongolian Serbian Galician Kirghiz Morisyen Shambala Ganda Koyra Chiini Mundang Shona German Koyraboro Senni Nama Slovak Greek Kwasio Ngomba Slovenian Gusii Langi North Ndebele Soga Hausa Latvian Norwegian Bokmål Somali Hawaiian Lingala Norwegian Nynorsk Spanish

<sup>&</sup>lt;sup>4</sup>This is a partial list compiled from the languages supported by fonts in the Mac OS X fonts library.

#### Lists-Enumerate, Itemize, Description

T<sub>E</sub>X Live does lists nicely. The types of lists include:

**Itemized** These lists separate items with bullets.

- ⇒ いち。【一】
- ⇒ に。【二】
- ⇒ さん。【三】

**Enumerated** Once you set them, numbered lists stay numbered. They never renumber themselves or combine themselves with previous or next numbered lists, areas where word processors struggle.

- 1. Ready.
- 2. Set.
- 3. Go.

**Description** Description lists are for items needing long explanations.<sup>5</sup>

**One** A single unit; as, one is the base of all numbers.

**Two** The sum of one and one; the number next greater than one and next less than three; two units or objects.

**Three** The number greater by a unit than two; three units or objects.

# TEX Live—An Aptitude for Details

The foregoing attributes provide a small sampling of what  $T_{E\!X}$  Live formats for you. And there is more. From here its aptitudes become more subtle as it forms characters into words, words into lines, lines into paragraphs and paragraphs into pages. It correctly typesets left-to-right, right-to-left and vertically. It works to create smooth margins with evenly spaced words and without character spacing. It manages widow and orphan lines and attempts to prevent difficult page breaks. Sometimes it requires manual intervention. But overall, it saves time and gives you the most beautiful results available, at lease equivalent to the best commercial typesetting software—sometimes better.

<sup>&</sup>lt;sup>5</sup>The definitions of One, Two and Three are from 1913 Webster.

# Children of TFX—Using Your System Fonts

Dr. Knuth developed  $T_EX$  in the 1970s and froze the code in the early 1980s. At the time, he also developed his own fonts to use with  $T_EX$ . He named them Computer Modern. When he made  $T_EX$  available to others at no cost, he included the fonts. They naturally served as the standard for many years. But most things age.

Despite the age of T<sub>E</sub>X in terms of computer systems—its output quality still exceeds that of 21st Century word processors and most commercial page publishing software. However, fonts have changed dramatically since the 1980s, including the introduction of Unicode fonts for international typesetting. Based on this evolution, several developers began modifying T<sub>E</sub>X to use Unicode fonts and the system fonts of your computer.

The first such application to gain widespread use was X<sub>\(\frac{1}{4}\)Ex, originally developed by Jonathan Kew and now taken over by others. It came with extensions to T<sub>\(\frac{1}{4}\)X, plus an expansion of \(\frac{1}{4}\)Ex called X<sub>\(\frac{1}{4}\)Ex \(\frac{1}{4}\)Ex provides easy access to most TrueType and Open-Type fonts. It supports Apple Advanced Typography and Graphite, a smart-font technology developed by SIL International. X<sub>\(\frac{1}{4}\)Ex supports general publishing and technical publishing, including mathematics. It is compatible with most existing T<sub>\(\frac{1}{4}\)Ex and \(\frac{1}{4}\)Ex classes, packages and macros. This document was created using X<sub>\(\frac{1}{4}\)Ex, Graphite fonts and other TrueType and OpenType fonts. The cover page was created entirely with X<sub>\(\frac{1}{4}\)Ex, as were figures 2, 3 and 4.</sub></sub></sub></sub></sub></sub></sub>

Another project using Unicode fonts is LuaT<sub>E</sub>X. LuaT<sub>E</sub>X is still in its early stages of development. Its most interesting feature is its ability to directly access typesetting functions in the T<sub>E</sub>X systems. It is compatible with Let X and X<sub>E</sub>T<sub>E</sub>X.

The point here is the ongoing development of  $T_EX$  and its offspring.  $T_EX$  Live is a living and mature free publishing system with thousands of users worldwide and a huge support network.

## **About The Learning Curve**

If you use the built-in styles of a word processor, you can learn to use TEX Live. Even if you do not use word processing styles, you can still learn. As with any new software, there is a learning curve for TEX Live, even on the Macintosh. But you are never alone when learning TEX Live. This is because MacTEX itself receives support from one of the most active groups of users for any publishing software. The Internet contains thousands of TEX tutorials, FAQs and examples. They exist on mailing lists, wikis, blogs, websites and bulletin boards worldwide.

You can also benefit from the knowledge of people using T<sub>E</sub>X on Unix, IBM mainframes, Windows and other systems. Because T<sub>E</sub>X operates the same on all machines, knowledge gained on the Mac instantly translates to T<sub>E</sub>X wherever it works. And visa-versa.

#### Resources

#### **Books**

These are commonly used. If you really want to understand  $T_EX$ , then read  $The\ T_EXbook$ , written by Donald E. Knuth, the original developer. It makes  $ET_EX$ ,  $X_{\overline{A}}T_EX$  and other children of  $T_EX$  easier to understand. The METAFONTbook is about the software used to make the originals  $T_EX$  fonts.

Michael Doob. *A Gentle Introduction to TeX: A Manual for Self-Study*. CTAN, 1993. This is a free PDF available from CTAN: http://ctan.org/pkg/gentle.

Victor Eijkhout. *T<sub>E</sub>X by topic: a T<sub>E</sub>Xnician's Reference*. Addison-Wesley Pub. Co., Wokingham, England, 1992. ISBN 0201568829. While this book is out print, you can download a free PDF of the book from CTAN: http://ctan.org/pkg/texbytopic.

Michel Goossens. *The ETEX Graphics Companion*. Addison-Wesley, Upper Saddle River, NJ, 2nd ed edition, 2008. ISBN 9780321508928 (pbk.: alk. paper). URL http://www.loc.gov/catdir/toc/ecip0713/2007010278.html.

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Donald Ervin Knuth. *The METAFONTbook*, Volume C of Computers & Typesetting. Addison-Wesley, Reading, Mass., 1986. ISBN 0201134454 (hard).

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Frank Mittelbach, Michel Goossens, Johannes Braams, and Chris Rowley. *The MeX Companion*. Addison-Wesley, Boston, 2nd ed. edition, 2004. ISBN 0201362996 (pbk. : alk. paper).

#### **Web Resources**

MacT<sub>E</sub>X Website:

http://www.tug.org/mactex/

T<sub>F</sub>X Live Website. T<sub>F</sub>X Live is the parent distribution of MacT<sub>F</sub>X:

http://www.tug.org/texlive/

T<sub>F</sub>X on Mac OS X Wiki:

http://mactex-wiki.tug.org/

MacT<sub>F</sub>X Mailing Lists:

http://mactex-wiki.tug.org/wiki/index.php/Mailing\_lists

#### Current Version of Welcome Doc

This is Version 2.0 of Welcome to MacTeX. Distributed on May 20, 2015

You can find the current version of this document at: http://www.tug.org/mactex/

This document was prepared by Bob Kerstetter. Thanks to Karl Berry, Dick Koch and Herb Schulz for proofreading and making suggestions. The author is responsible for its content, including any omissions and errors. Send your comments to tex@villagehiker.com.

#### **Change History**

May 20, 2015 Original release of Version 2.0