Smart Documents

Marius Peter 23 Jul. 2020 (Thu)

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Abstract

The idea of *Smart Documents* came to me as I was reflecting on how to improve the document production process in my workplace. So much time was wasted on formatting; output PDFs were awfully inconsistent, and conveyed poor brand awareness from a typographical standpoint.

1 Introduction

GNU Emacs is most often used as a text editor. The utmost level of customization is afforded by enabling the user to rewrite *any* part of the source code and observe the editor's modified behaviour in real time. Since its inception in 1984, GNU Emacs has grown to be much more than a full-featured, high-productivity text editor—new *modes* have been written to interact with hundreds of file formats, including .txt, .pdf, .jpg, .csv, and .zip just to name a few. This configuration file itself was written in *Org mode*, a collection of functions enabling the harmonious mixing of code and comments in view of publication: this is the endgame of *literate programming*, and the basis of my vision for *Smart Documents*.

The following sections were laid out very deliberately. When we start Emacs, the source code blocks contained in this document are evaluated sequentially—our editing environment is constructed in real time as we execute the blocks in order. For instance, we only begin loading packages once we ensured use-package is working properly.¹

Customizing Emacs goes far, far beyond this document—feel free to experiment and discover.

- C-h f describe function
- C-h v describe variable
- C-h k describe key

These three commands will attempt to describe the element currently under our cursor, however one can start typing to search for another symbol.

1.1 init.el

When Emacs first starts up, it looks for the following files in order and attempts to load the contents of the first existing file. From the manual:

Traditionally, file ~/.emacs is used as the init file, although Emacs also looks at ~/.emacs.el, ~/.emacs.d/init.el, ~/.config/emacs/init.el, or other locations.²

If no file is found, Emacs then loads in its purely vanilla state.

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¹For more information on the detailed steps Emacs takes upon starting, refer to https://www.gnu.org/ software/emacs/manual/html_node/elisp/Startup-Summary.html.

²https://www.gnu.org/software/emacs/manual/html_node/emacs/Init-File.html

2 TODO First-time setup

Create meta-file to record user-full-name etc

2.1 File system paths

In this subsection, we tell Emacs about relevant paths to resources. On my MS Windows machine, I add the path to Portable Git.³

```
(when (string-equal system-type "windows-nt")
  (add-to-list 'exec-path "C:/Users/marius.peter/PortableGit/bin/"))
```

3 Early setup

3.1 Garbage collection

First, we increase the RAM threshold beyond which the garbage collector is activated.

(setq gc-cons-threshold 10000000)

3.2 Profiling — start

We start the profiler now , and will interrupt it in Section 8.1. We will then present profiling report in Section 8.2.

; (profiler-start)

3.3 TODO Emacs client

Makes opening emacs faster for following instances.

; (setq initial-buffer-choice (lambda () (get-buffer "*dashboard*")))

3.4 Customization shortcuts

We begin by defining a user shortcut to this very file. We load this as early as possible, this facilitates debugging.

```
(defun my/find-literate-config ()
  "Jump to this very file."
  (interactive)
  (find-file my/literate-config))
```

(global-set-key (kbd "C-c c") 'my/find-literate-config)

```
<sup>3</sup>Download from https://git-scm.com/download/win
```

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Now, different shortcuts for other customization actions:

(global-set-key (kbd "C-c v") 'customize-variable)
(global-set-key (kbd "C-c f") 'customize-face)

3.5 Locations

In this section, we'll be tidying up the **.emacs.d**/ directory—by default, many Emacs packages create files useful for themselves in our **user-emacs-directory**. This leads to undesirable clutter. Certain packages create files that log recently visited files (3.5.2); log location of known projects (3.5.3); log location in recently visited files (3.5.4) The commonality between all these files is that they tend to reference... other files. Thus, I decided to refer to them as meta-files. First, let's designate a folder to collect our meta-files together:

(setq my/meta-files-location (concat user-emacs-directory "meta/"))

3.5.1 Custom file

Load settings created automatically by GNU Emacs Custom. (For example, any clickable option/toggle is saved here.) Useful for fooling around with M-x customize-group <package>.

(setq custom-file (concat user-emacs-directory "init-custom.el"))
(load custom-file)

3.5.2 Recently visited files

3.5.3 Projects' bookmarks

3.5.4 Location in previously visited file

```
(setq save-place-file (concat
    my/meta-files-location
    "places"))
```

3.6 Backups

Backups are so important that they should be described right after the shortcut to this file.

```
(setq backup-directory-alist `((".*" . ,temporary-file-directory))
auto-save-file-name-transforms `((".*" ,temporary-file-directory t))
backup-by-copying t ; Don't delink hardlinks
version-control t ; Use version numbers on backups
delete-old-versions t ; Automatically delete excess backups
kept-new-versions 20 ; how many of the newest versions to keep
kept-old-versions 5 ; and how many of the old
)
```

3.7 Initial and default frames

We set the dimensions of the inital and default frames.

```
(add-to-list 'default-frame-alist '(width . 100))
(add-to-list 'default-frame-alist '(height . 50))
(add-to-list 'initial-frame-alist '(width . 100))
(add-to-list 'initial-frame-alist '(height . 50))
```

3.7.1 GNU/Linux

These settings affect the first and subsequent frames spawned by Emacs in GNU/Linux. Frame transparency increases when focus is lost.

```
(when (and (display-graphic-p) (string-equal system-type "gnu/linux"))
  (set-frame-parameter (selected-frame) 'alpha '(90 . 50))
  (add-to-list 'default-frame-alist '(alpha . (90 . 50))))
```

3.8 Secrets

The code containe din the secrets.org file is loaded by Emacs, but not rendered in this PDF for the sake of privacy. It contains individually identifying information such as names and e-mail addresses, which are used to populate Org templates (Section 5.2). You need to create this secrets.org file, as it is ignored by git by default.

(org-babel-load-file "~/.emacs.d/secrets.org")

4 Global key bindings

The following bindings strive to further enhance CUA mode.⁴

(cua-mode)

4.1 Keyboard navigation

4.1.1 Saving a file

(global-set-key (kbd "C-s") 'save-buffer)

4.1.2 Opening a file

```
(global-set-key (kbd "C-o") 'find-file)
```

4.1.3 Opening a recently visited file

(global-set-key (kbd "C-r") 'counsel-recentf)

4.1.4 Make only window

(global-set-key (kbd "C-`") 'delete-other-windows)

4.1.5 Locating a file

(global-set-key (kbd "C-c 1") 'counsel-locate)

4.1.6 Closing window and quitting Emacs

```
(defun my/delete-window-or-previous-buffer ()
  "Delete window; if sole window, previous buffer."
   (interactive)
   (if (> (length (window-list)) 1)
      (delete-window)
      (previous-buffer)))
```

The following bindings lead to more natural exit behaviors.

```
(global-set-key (kbd "C-w") 'my/delete-window-or-previous-buffer)
(global-set-key (kbd "C-q") 'save-buffers-kill-terminal)
```

⁴Common User Access. This is a term coined by IBM which has influenced user navigation cues on all modern desktop OSes. From IBM's CUA, we get the Ctrl-v and Ctrl-v keyboard shortcuts.

4.2 Mouse zoom

The typical binding on both GNU/Linux and MS Windows is adequate here: C-= to zoom in, C-- to zoom out.

It seems that starting with Emacs 27.1, Control + mousewheel works.

```
(global-set-key (kbd "C--") 'text-scale-decrease)
(global-set-key (kbd "C-=") 'text-scale-increase)
(global-set-key (kbd "C-+") 'text-scale-increase)
```

5 Packages

Packages are collections of .el files providing added functionality to Emacs.

5.1 Meta

How do we bootstrap packages? First, let's figure out:

- 1. Where we get our packages from
- 2. How we upgrade packages
- 3. How we ensure our required packages are installed

5.1.1 Package archives

List of package archives.

```
(require 'package)
(add-to-list 'package-archives '("melpa" . "https://melpa.org/packages/") t)
(add-to-list 'package-archives '("org" . "https://orgmode.org/elpa/") t)
(package-initialize)
```

5.1.2 TODO Convenient package update

One-function rollup of upgradeable package tagging, download and lazy install.

5.1.3 use-package

We ensure use-package is installed, as well as all packages described in this configuration file.

```
(unless (package-installed-p 'use-package)
  (package-refresh-contents)
  (package-install 'use-package)
```

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```
(eval-when-compile (require 'use-package)))
(setq use-package-always-ensure t)
(require 'use-package)
(require 'bind-key)
```

5.2 org-mode

Phew, I can finally introduce Org mode! I am so excited.

Org mode replaces aword processor, a presentation creator, and a spreadsheet editor. IMHO, the spreadsheet ability captures more than 80% use cases wherein one wishes to include a table in a text document destined for physical publication. (It is clear that Excel spreadsheets are *not* destined for physical publication—simply attempt to print an Excel spreadsheet with the default settings.) In my opinion, Org mode matches all *useful* features of the Microsoft Office suite 1-to-1.

What follows are customizations designed to make Org mode behave more like Microsoft Word. The end goal is, once again, to draw as many new users to Emacs as possible!

5.2.1 Basic customization

Org base directory is in user home on GNU/Linux, or in AppData in MS Windows.

```
(setq org-directory (concat user-emacs-directory "~/org"))
```

First, we hide markup symbols for **bold**, *italic*, <u>underlined</u> and strikethrough text, and ensure our document appears indented upon loading:⁵

For the time being, I will in fact display emphasis markers, because hiding them corrupts tables.

```
(setq org-hide-emphasis-markers nil)
(setq org-startup-indented t)
```

5.2.2 Languages executable in smart documents

The following languages can be written inside SRC blocks, in view of being executed by the Org Babel backend.

```
(setq org-babel-load-languages
 '((shell . t)
      (python . t)
      (plantuml . t)
      (emacs-lisp . t)
```

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⁵It *appears* indented, but the underlying plaintext file does not contain tab characters!

(awk . t)
(ledger . t)
(gnuplot . t)
(latex . t)))

5.2.3 Prevent or warn on invisible edits

```
(setq org-catch-invisible-edits t)
```

5.2.4 Agenda

The agenda displays a chronological list of headings across all agenda files for which the heading or body contain a matching org-time-stamp.⁶

```
(global-set-key (kbd "C-c a") 'org-agenda-list)
```

```
(defun my/find-diary-file ()
  "Load `org-agenda-diary-file'."
  (interactive)
  (find-file org-agenda-diary-file))
```

(global-set-key (kbd "C-c d") 'my/find-diary-file)

5.2.5 Timestamps

More literary timestamps are exported to MFX using the following custom format:

```
(setq org-time-stamp-custom-formats
    '("%d %b. %Y (%a)" . "%d %b. %Y (%a), at %H:%M"))
```

5.2.6 LATEX export

We'll be compiling our documents with LuaTeX. This will afford us some future-proofing, since it was designated as the successor to pdfTeX by the latter's creators.

First, we define the command executed when an Org file is exported to $\bowtie_E X$. We'll use latexmk, the Perl script which automagically runs binaries related to $\bowtie_E X$ in the correct order and the right amount of times.

Options and why we need them:

-shell-excape required by minted to color source blocks

-pdflatex=lualatex we use lualatex to generate our PDF

-interaction=nonstopmode go as far as possible without prompting user for input

```
<sup>6</sup>An org-time-stamp can be inserted with C-c . (period)
```

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```
(setq org-latex-pdf-process
    '("latexmk -pdf -f \
-pdflatex=lualatex -shell-escape \
-interaction=nonstopmode -outdir=%0 %f"))
```

We customize the format for org time stamps to make them appear monospaced in our exported $\Delta T_E X$ documents. This makes them visually distinguishable from body text.

```
(setq org-latex-active-timestamp-format
    "\\texttt{%s}")
(setq org-latex-inactive-timestamp-format
    "\\texttt{%s}")
```

The following packages are loaded for every time we export to LATEX.

```
(setq org-latex-packages-alist
  '(("AUTO" "polyglossia" t
    ("xelatex" "lualatex"))
  ("AUTO" "babel" t
    ("pdflatex"))
  ("" "booktabs" t
    ("pdflatex"))
  ("table,svgnames" "xcolor" t
    ("pdflatex"))))
```

Little bonus for GNU/Linux users: syntax highlighting for source code blocks in $\ensuremath{\mathbb{M}}_{\ensuremath{\mathsf{E}}} X$ exports.

Now, we set the files to be deleted when a $\bowtie_E X \rightarrow \text{PDF}$ compilation occurs. We only care about two files, in the end: the Org mode file for edition, and the PDF for distribution.

```
(setq org-latex-logfiles-extensions
    '("aux" "bcf" "blg" "fdb_latexmk"
        "fls" "figlist" "idx" "log" "nav"
        "out" "ptc" "run.xml" "snm" "toc" "vrb" "xdv"
        "tex" "lot" "lof"))
```

By default, Org agenda inserts diary entries as the first under the selected date. It is preferable to insert entries in the order that they were recorded, i.e. chronologically.

(setq org-agenda-insert-diary-strategy 'date-tree-last)

What follows are the document class structures that can be exported in MFX.

```
(setg org-latex-classes
  '(("article" "\\documentclass[11pt]{article}"
     ("\\section{%s}" . "\\section*{%s}")
("\\subsection{%s}" . "\\subsection*{%s}")
     ("\\subsubsection{%s}" . "\\subsubsection*{%s}")
     ("\\paragraph{%s}" . "\\paragraph*{%s}")
     ("\\subparagraph{%s}" . "\\subparagraph*{%s}"))
    ("report" "\\documentclass[11pt]{report}"
     ("\\part{%s}" . "\\part*{%s}")
     ("\\chapter{%s}" . "\\chapter*{%s}")
     ("\\section{%s}" . "\\section*{%s}")
     ("\\subsection{%s}" . "\\subsection*{%s}")
     ("\\subsubsection{%s}" . "\\subsubsection*{%s}"))
    ("book" "\\documentclass[12pt]{book}"
     ("\\part{%s}" . "\\part*{%s}")
     ("\\chapter{%s}" . "\\chapter*{%s}")
     ("\\section{%s}" . "\\section*{%s}")
     ("\\subsection{%s}" . "\\subsection*{%s}")
     ("\\subsubsection{%s}" . "\\subsubsection*{%s}"))
    ("book-blendoit" "\\documentclass[12pt]{book}"
     ("\\chapter{%s}" . "\\chapter*{%s}")
("\\section{%s}" . "\\section*{%s}")
     ("\\subsection*{%s}" . "\\subsection*{%s}")
     ("\\subsubsection*{%s}" . "\\subsubsection*{%s}"))))
```

By default, body text can immediately follow the table of contents. It is however cleaner to separate table of contents with the rest of the work.

(setq org-latex-toc-command "\\tableofcontents\\clearpage")

The following makes TODO items appear red and CLOSED items appear green in Org's MEX exports. Very stylish, much flair!

5.2.7 TODO Export

This creates a shorter binding for the most common Org export: Org $\rightarrow \bowtie_E X \rightarrow \text{PDF}$.

```
(defun my/org-quick-export ()
  "Org async export to PDF and open.
  This basically reimplements `C-c C-e C-a l o'."
  (interactive)
```

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(org-open-file (org-latex-export-to-pdf)))

(global-set-key (kbd "C-c e") 'my/org-quick-export)

5.3 TODO evil-mode

Forgive me, for I have sinned.

This is the 2nd most significant customization after **org-mode**. Enabling **evil-mode** completely changes editing keys.⁷

```
(use-package evil)
; (setq evil-toggle-key "C-c d"); devil...
; (evil-mode 1)
```

5.4 Spelling, completion, and snippets

The following customizations open the doors to vastly increased typing speed and accuracy.

5.4.1 flycheck

Syntax highlighting for Emacs.

```
(use-package flycheck)
(global-flycheck-mode)
```

5.4.2 TODO flyspell

```
(use-package flyspell)
(add-hook 'text-mode-hook 'flyspell-mode)
```

5.4.3 Insert template from keyword

Thanks to yasnippet, we can type certain keywords, press TAB, and this will automatically insert a text snippet. We may then navigate through the snippet by using TAB (next field) and SHIFT-TAB (previous field).

For instance: Typing src then pressing TAB will expand the keyword to the following text:

#+BEGIN_SRC emacs-lisp

#+END_SRC

⁷For more information on vi keybindings, visit https://hea-www.harvard.edu/~fine/Tech/vi.html.

We notice that emacs-lisp is highlighted—this is the first modifiable field.

```
(use-package yasnippet)
(yas-global-mode 1)
```

5.4.4 Complete anything interactively

; (add-hook 'after-init-hook 'global-company-mode)

5.4.5 Delete all consecutive whitespaces

```
(use-package hungry-delete
:init (hungry-delete-mode))
```

5.5 Utilities

5.5.1 Versioning of files

Wonderful Git porcelain for Emacs. Enables the administration of a Git repository in a painfree way.

```
(use-package magit
:bind ("C-c g" . magit-status))
```

5.5.2 Navigate between projects

This enables us to better manage our .git projects.

```
(use-package projectile
 :bind ("C-c p" . 'projectile-command-map)
 :init (projectile-mode 1)
        (setq projectile-completion-system 'ivy))
```

5.5.3 Display keyboard shortcuts on screen

```
(use-package which-key
    :init (which-key-mode))
```

5.5.4 Jump to symbol's definition

```
(use-package dumb-jump)
(add-hook 'xref-backend-functions #'dumb-jump-xref-activate)
```

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5.5.5 Graphical representation of file history

```
(use-package undo-tree)
(global-undo-tree-mode)
```

5.5.6 Auto-completion framework

```
(ivy-mode t)
```

1. Smartly suggesting interactive search matches Wonderful counsellor!

```
(use-package counsel
 :bind ("M-x" . counsel-M-x)
 :config (counsel-mode t))
```

```
(global-set-key (kbd "C-f") 'counsel-grep-or-swiper)
```

2. Searching for items

```
(use-package swiper
 :bind (("C-f" . counsel-grep-or-swiper)))
```

5.6 File formats

5.6.1 csv and Excel

(use-package csv-mode)

5.6.2 Interacting with PDFs

Org mode shines particularly when exporting to PDF—Org files can reliably be shared and exported to PDF in a reproducible fashion.

(use-package pdf-tools)
;; (pdf-tools-install)

5.6.3 Accounting

Ledger is a creation of John Wiegley's. It enables double-entry accounting in a simple plaintext format, and reliable verification of account balances through time.⁸

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⁸For more information, visit https://www.ledger-cli.org/.

(use-package ledger-mode :bind ("C-c r" . ledger-report) ("C-c C" . ledger-mode-clean-buffer))

These reports can be generated within Emacs. It is quite useful to pipe their output to an automated "smart document".

(setq ledger-reports

```
'(("bal" "%(binary) -f %(ledger-file) bal")
("bal-USD" "%(binary) -f %(ledger-file) bal --exchange USD")
("reg" "%(binary) -f %(ledger-file) reg")
("net-worth" "%(binary) -f %(ledger-file) bal ^Assets ^Liabilities --exchange
("net-income" "%(binary) -f %(ledger-file) bal ^Income ^Expenses --exchange
("payee" "%(binary) -f %(ledger-file) reg @%(payee)")
("account" "%(binary) -f %(ledger-file) reg %(account)")
("budget" "%(binary) -f %(ledger-file) budget --exchange USD")))
```

5.6.4 Plotting & charting

(use-package gnuplot)

5.7 Cosmetics

5.7.1 Start page

We replace the standard welcome screen with our own.

5.7.2 TODO Mode line

```
(use-package powerline)
```

5.7.3 TODO Sidebar

Get inspiration from ibuffer-sidebar and create a better sidebar.

;; (load-file)

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5.7.4 Better parentheses

```
(use-package rainbow-delimiters
  :config (add-hook 'prog-mode-hook #'rainbow-delimiters-mode))
(electric-pair-mode)
        (show-paren-mode 1)
```

5.7.5 Highlight "color keywords" in their color

This highlights hexadecimal numbers which look like colors, in that same color.

```
(use-package rainbow-mode
    :init
    (add-hook 'prog-mode-hook 'rainbow-mode))
```

5.7.6 UTF-8 bullet points in Org mode

```
(use-package org-bullets
    :config
    (when (string-equal system-type "gnu/linux")
        (add-hook 'org-mode-hook (lambda () (org-bullets-mode 1)))))
```

6 Editing preferences

These customizations enhance editor usability. They are not brought about

6.1 Editor

6.1.1 Coding standards

This is just a better default. Don't @ me.

```
(setq c-default-style "linux"
    c-basic-offset 4)
```

6.1.2 Recent files

The keybinding for opening a recently visited file is described in paragraph 4.1.3.

```
(recentf-mode 1)
(setq recentf-max-menu-items 25)
(setq recentf-max-saved-items 25)
(run-at-time nil (* 5 60) 'recentf-save-list)
```

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6.2 Frame

6.2.1 Clean up menus

Originally, I wished to inhibit certain entries in the GUI menus. Not worth the effort at this time.

```
(menu-bar-mode -1)
(tool-bar-mode -1)
```

6.2.2 Dividers

This ensures users can resize windows using the GUI. It also creates a useful separation between the bottom of the frame and the echo area.

(menu-bar-bottom-and-right-window-divider)

6.2.3 TODO Header & mode line

Complete mode line rewrite. Might require new package.

Top of the buffer is more intuitive for buffer info, bottom is more intuitive for buffer action. This is pretty much a gutted out powerline.

1. Header line

(setq header-line-format "%b")

2. Mode line

(setq mode-line-format nil)

6.3 Window

6.4 Buffer

Save cursor location in visited buffer after closing it or Emacs.

(save-place-mode 1)

6.4.1 Column filling

A line of text is considered "filled" when it reaches 79 characters in length.

(setq-default fill-column 79)

Automatically break lines longer than fill-column.

(add-hook 'org-mode-hook 'turn-on-auto-fill)

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6.5 Minibuffer

We replace the longer yes-or-no-p questions with more convenient y-or-n-p.

```
(defalias 'yes-or-no-p 'y-or-n-p)
```

Disable minibuffer scroll bar.

(set-window-scroll-bars (minibuffer-window) nil nil)

7 Themes

Without a carefully designed theme, our editor could become unusable. Thus, we describe two themes that were developed purposefully and iteratively.

```
(setq custom-theme-directory (concat user-emacs-directory "themes/"))
(load-theme 'blendoit-light)
; (load-theme 'blendoit-dark)
```

7.1 My light and dark themes

A highly legible, unambiguous, and classic theme.

7.1.1 Colors

The default face is a black foreground on a white background, this matches MS Word. We are striving for a simple, intuitive color scheme.

Most of the visual cues derived from color are identical in both light and dark themes (Table 1).

7.1.2 Cursors

In order to imitate other modern text editors, we resort to a blinking bar cursor. We choose red, the most captivating color, because the cursor is arguably the region on our screen:

- 1. most often looked at;
- 2. most often searched when lost.

In files containing only fixed-pitch fonts (i.e. files containing only code), the cursor becomes a high-visibility box.

In files containing a mix of variable-pitch and fixed-pitch fonts, the cursor is a more MS Word-like bar.

```
(setq-default cursor-type 'bar)
```

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Table 1: Light and dark themes' colors.

Color	blendoit-light	blendoit-dark						
Black	default text	default background						
Lighter shades	lesser headers	n/a						
White	default background	default text						
Darker shades	n/a	lesser headers						
Red	negative	same						
Tomato	timestamp `TODO'	same						
Green	positive	same						
ForestGreen	timestamp `DONE'	same						
Blue	interactable content; links	same						
SteelBlue	anything Org mode; anchor color	same						
DeepSkyBlue	highlight	same						
DodgerBlue	isearch	same						
Purple								

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7.1.3 Fonts

Hack default and fixed-pitch

- Legible, modern monospace font
- Strict, sharp, uncompromising

Liberation Sans variable-pitch

- Libre alternative to Arial
- Unoffensive

Hermit org-block, anything Org/meta in general

- Slightly wider than Hack
- More opinionated shapes
- Very legible parentheses
- Using proportional fonts when needed We use variable-pitch-mode for appropriate modes.

```
(add-hook 'org-mode-hook 'variable-pitch-mode)
(add-hook 'info-mode-hook 'variable-pitch-mode)
```

2. TODO Default font size

Make default font size larger on displays of which the resolution is greater than 1920×1080.

7.2 TODO minimal

8 Late setup

At this point, our editor is almost ready to run. Phew! All that's left to do is to interrupt our profiling activities, and smartly store the result of our profiling.

8.1 Profiling — stop

;; (profiler-stop)

8.2 Profiling — report

;; (profiler-report)

9 Conclusion

In this configuration file, we described a series of customization steps taken to make Emacs more palatable to modern IDE users.

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