面向宏包与类文件编写者的 IATEX —当前版本

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1 介绍

IPTEX 2_{ε} 于 1994 年发布,为 IPTEX 引入了一些新概念。这些概念在 clsguide-historic 中为宏包和类的作者进行了描述,该文档在很大程度上保持不变。此后,IPTEX 团队致力于多个想法: 首先是为 IPTEX 设计的编程语言(L3 编程层),然后是一系列建立在该语言基础上的作者工具。在这里,我们概述了由 IPTEX 核心提供给宏包和类开发者的当前稳定工具集。我们假设读者作为文档作者熟悉一般的 IPTEX 用法,并建议阅读本文与 usrguide 结合,后者提供给一般 IPTEX 用户有关创建命令等当代方法的信息。

2 编写类和宏包

本节讨论了编写 IATEX 类和宏包的基本要点。

2.1 是类还是宏包?

当您想在文件中添加一些新的 LATEX 命令时,首先要决定它是一个文档类还是一个宏包。经验法则是:

如果这些命令可以与任何文档类一起使用,那么将它们制作为一个宏包;否则,将其制作为一个类。

类有两种主要类型:像 article、report 或 letter 这样的独立类;以及扩展或变体其他类的类,比如构建在 article 文档类之上的 proc 文档类。

因此,一个公司可能会有一个用于打印带有自己抬头纸的信件的本地 ownlet 类。这样的类将在现有的 letter 类的基础上构建,但它不能与其他任何文档类一起使用,因此我们有了 ownlet.cls 而不是 ownlet.sty。

相比之下,graphics 宏包提供了将图像包含到 LATEX 文档中的命令。由于这些命令可以与任何文档类一起使用,我们有了 graphics.sty 而不是 graphics.cls。

2.2 使用 'docstrip' 和 'doc'

如果您打算为 IAT_{EX} 编写一个大型的文档类或宏包,您应该考虑使用随 IAT_{EX} 一起提供的 doc 软件。使用 doc 编写的 IAT_{EX} 文档类和宏包可以以两种方式进行处理:它们可以通过 IAT_{EX} 运行以生成文档;也可以通过 docstrip 运行以生成、cls 或 .sty 文件。

doc 软件可以自动生成定义索引、命令使用索引和变更记录列表。它对于维护和记录大型 T_FX 源文件非常有用。

IATEX 核心本身以及标准文档类等的文档化源代码都是 doc 文档;它们位于分发中的 .dtx 文件中。实际上,您可以通过在 source2e.tex 上运行 IATEX 来排版核心源代码作为一个长文档,包括索引。排版这些文档使用了类文件ltxdoc.cls。

有关 doc 和 docstrip 的更多信息,请参阅文件 docstrip.dtx、doc.dtx 和 *The LATEX Companion*。要了解其用法示例,请查看 .dtx 文件。

2.3 标准文档类的政策

我们收到的有关标准文档类的问题报告中,很多并不涉及错误,而是更或 多或少地礼貌地暗示这些类中体现的设计决策"不够优秀",并要求我们对其进 行修改。

有几个原因我们不应该对这些文件进行此类更改:

- 不管多么误导, 当前的行为显然是设计这些类时所预期的。
- 更改"标准类"的这些方面并不是一个好的做法,因为许多人将依赖于它们。

因此,我们决定甚至不考虑进行这种修改,也不花时间来证明这个决定。这 并不意味着我们不同意这些类的设计存在许多缺陷,但是我们有许多更重要的 任务,而不是不断解释为什么 LATEX 的标准文档类不能改变。

当然,我们欢迎更好的类的产生,或者用于增强这些类的包的出现。因此,当您考虑到这样的不足时,我们希望您首先的想法是"我能做些什么来改善这个?"

2.4 命令名称

在介绍下一节中描述的 L3 编程层引入之前,IATFX 有三种类型的命令。

第一种是作者命令,比如 \section、\emph 和 \times: 这些命令通常有简短的名称,全部是小写。

第二种是类和宏包编写者命令: 这些命令通常有长的混合大小写名称, 例如以下几个。

\InputIfFileExists \RequirePackage \PassOptionsToClass

最后一种是用于 LATEX 实现的内部命令,比如 \@tempcnta、\@ifnextchar 和 \@eha: 其中大多数命令的名称中包含 @, 这意味着它们不能在文档中使用,只能在类和宏包文件中使用。

2.5 编程支持

正如在介绍中所指出的,IATEX 核心今天加载了来自编程的专用支持,这里称为 L3 编程层,通常也称为 expl3。L3 编程层的一般方法的详细信息在文档 expl3 中给出,而当前所有代码接口的参考可以在 interface3 中找到。这个层包含两种类型的命令:一个由 API 组成的文档化命令集,和大量的私有内部命令。后者都以两个下划线开头,不应在定义它们的代码模块之外使用。这种更有结构的方法意味着使用 L3 编程层不会像使用 '@ 命令' 那样受到上面提到的某种程度上的不稳定情况的影响。

在这里我们不涉及使用 L3 编程层的细节。关于该方法的良好介绍可在https://www.alanshawn.com/latex3-tutorial/找到。

2.6 Box commands and color

Even if you do not intend to use color in your own documents, by taking note of the points in this section you can ensure that your class or package is compatible with the color package. This may benefit people using your class or package and wish to use color.

The simplest way to ensure 'color safety' is to always use LATEX box commands rather than TEX primitives, that is use \sbox rather than \setbox, \mbox rather than \hbox and \parbox or the minipage environment rather than \vbox. The LATEX box commands have new options which mean that they are now as powerful as the TEX primitives.

As an example of what can go wrong, consider that in {\ttfamily <text>} the font is restored just before the }, whereas in the similar looking construction {\color{green} <text>} the color is restored just after the final }. Normally this distinction does not matter at all; but consider a primitive TEX box assignment such as:

\setbox0=\hbox{\color{green} <text>}

Now the color-restore occurs after the } and so is *not* stored in the box. Exactly what bad effects this can have depends on how color is implemented: it can range from getting the wrong colors in the rest of the document, to causing errors in the dvi-driver used to print the document.

Also of interest is the command \normalcolor. This is normally just \relax (i.e., does nothing) but you can use it rather like \normalfont to set regions of the page such as captions or section headings to the 'main document color'.

2.7 General style

LATEX provides many commands designed to help you produce well-structured class and package files that are both robust and portable. This section outlines some ways to make intelligent use of these.

2.7.1 Loading other files

LATEX provides these commands:

\LoadClass \LoadClassWithOptions \RequirePackage \RequirePackageWithOptions

for using classes or packages inside other classes or packages. We recommend strongly that you use them, rather than the primitive \input command, for a number of reasons.

Files loaded with \input <filename> will not be listed in the \listfiles list.

If a package is always loaded with \RequirePackage... or \usepackage then, even if its loading is requested several times, it will be loaded only once. By contrast, if it is loaded with \input then it can be loaded more than once; such an extra loading may waste time and memory and it may produce strange results.

If a package provides option-processing then, again, strange results are possible if the package is \input rather than loaded by means of \usepackage or \RequirePackage....

If the package foo.sty loads the package baz.sty by use of \input baz.sty then the user will get a warning:

```
LaTeX Warning: You have requested package `foo', but the package provides `baz'.
```

Thus, for several reasons, using \input to load packages is not a good idea.

For example, article.sty contains just the following lines:

```
\NeedsTeXFormat{LaTeX2e}
\@obsoletefile{article.cls}{article.sty}
\LoadClass{article}
```

You may wish to do the same or, if you think that it is safe to do so, you may decide to just remove myclass.sty.

2.7.2 Make it robust

We consider it good practice, when writing packages and classes, to use LATEX commands as much as possible.

Thus, instead of using \def... we recommend using one of \newcommand, \renewcommand or \providecommand for programming and for defining document interfaces \NewDocumentCommand, etc. (see usrguide for details of these commands).

When you define an environment, use \NewDocumentEnvironment, etc., (or \newenvironment, etc., for simple cases) instead of using \def\foo{...} and \def\endfoo{...}.

If you need to set or change the value of a $\langle dimen \rangle$ or $\langle skip \rangle$ register, use \setlength.

To manipulate boxes, use LATEX commands such as \sbox, \mbox and \parbox rather than \setbox, \hbox and \vbox.

Use \PackageError , \PackageWarning or \PackageInfo (or the equivalent class commands) rather than \Qarning or \Warning or \Warning

The advantage of this kind of practice is that your code is more readable and accessible to other experienced LATEX programmers.

2.7.3 Make it portable

It is also sensible to make your files are as portable as possible. To ensure this, files must not have the same name as a file in the standard LATEX distribution, however similar its contents may be to one of these files. It is also still lower risk to stick to file names which use only the ASCII range: whilst LATEX works natively with UTF-8, the same cannot be said with certainty for all tools. For the same reason, avoid spaces in file names.

It is also useful if local classes or packages have a common prefix, for example the University of Nowhere classes might begin with unw. This helps to avoid every University having its own thesis class, all called thesis.cls.

If you rely on some features of the LATEX kernel, or on a package, please specify the release-date you need. For example, the package error commands were introduced in the June 2022 release so, if you use them then you should put:

\NeedsTeXFormat{LaTeX2e}[2022-06-01]

2.7.4 Useful hooks

It is sometimes necessary for a package to arrange for code to be executed at the start or end of the preamble, at the end of the document or at the start of every use of an environment. This can be carried out by using hooks. As a document author, you will likely be familiar with \AtBeginDocument, a wrapper around the more powerful command \AddToHook. The IATEX kernel provides a large number of dedicated hooks (applying in a pre-defined location) and generic hooks (applying to arbitrary commands): the interface for using these is described in lthooks. There are also hooks to apply to files, described in ltfilehooks.

3 The structure of a class or package

The outline of a class or package file is:

Identification The file says that it is a $\LaTeX 2_{\varepsilon}$ package or class, and gives a short description of itself.

Preliminary declarations Here the file declares some commands and can also load other files. Usually these commands will be just those needed for the code used in the declared options.

Options The file declares and processes its options.

More declarations This is where the file does most of its work: declaring new variables, commands and fonts; and loading other files.

3.1 Identification

The first thing a class or package file does is identify itself. Package files do this as follows:

```
\NeedsTeXFormat{LaTeX2e}
\ProvidesPackage{<package>}[<date> <other information>]

For example:
   \NeedsTeXFormat{LaTeX2e}
   \ProvidesPackage{latexsym}[1998-08-17 Standard LaTeX package]

Class files do this as follows:
   \NeedsTeXFormat{LaTeX2e}
   \ProvidesClass{<class-name>}[<date> <other information>]

For example:
   \NeedsTeXFormat{LaTeX2e}
```

\ProvidesClass{article}[2022-06-01 Standard LaTeX class]

The $\langle date \rangle$ should be given in the form 'YYYY-MM-DD' and must be present if the optional argument is used (this is also true for the \NeedsTeXFormat command). Any derivation from this syntax will result in low-level TeX errors—the commands expect a valid syntax to speed up the daily usage of the package or class and make no provision for the case that the developer made a mistake!

This date is checked whenever a user specifies a date in their \documentclass or \usepackage command. For example, if you wrote:

```
\documentclass{article}[2022-06-01]
```

then users at a different location would get a warning that their copy of article was out of date.

The description of a class is displayed when the class is used. The description of a package is put into the log file. These descriptions are also displayed by the \listfiles command. The phrase Standard LaTeX must not be used in the identification banner of any file other than those in the standard LaTeX distribution.

3.2 Using classes and packages

A LATEX package or class can load a package as follows:

```
\RequirePackage[<options>]{<package>}[<date>]
```

For example:

```
\RequirePackage{ifthen}[2022-06-01]
```

This command has the same syntax as the author command \usepackage. It allows packages or classes to use features provided by other packages. For example, by loading the ifthen package, a package writer can use the 'if...then...else...' commands provided by that package.

A LATEX class can load one other class as follows:

```
\LoadClass[<options>]{<class-name>}[<date>]
```

For example:

```
\LoadClass[twocolumn]{article}
```

This command has the same syntax as the author command \documentclass. It allows classes to be based on the syntax and appearance of another class. For example, by loading the article class, a class writer only has to change the bits of article they don't like, rather than writing a new class from scratch.

The following commands can be used in the common case that you want to simply load a class or package file with exactly those options that are being used by the current class.

```
\LoadClassWithOptions{<class-name>}[<date>]
\RequirePackageWithOptions{<package>}[<date>]
```

For example:

```
\LoadClassWithOptions{article}
\RequirePackageWithOptions{graphics}[1995/12/01]
```

3.3 Declaring options

Packages and classes can declare options and these can be specified by authors; for example, the twocolumn option is declared by the article class. Note that the name of an option should contain only those characters allowed in a 'IATEX name'; in particular it must not contain any control sequences.

LATEX supports two methods for creating options: a key-value system and a 'simple text' approach. The key-value system is recommended for new classes and packages, and is more flexible in handling of option classes than the simple text approach. Both option methods use the same basic structure within the LATEX source: declaration of options first then processing options in a second step. Both also allow options to be passed on to other packages or an underlying class. As the 'classical' simple text approach is conceptually more straightforward to illustrate, it is used here to show the general structure: see Section 4.4 for full details of the key-value approach.

An option is declared as follows:

```
\DeclareOption{<option>}{<code>}
```

For example, the dvips option (slightly simplified) to the graphics package is implemented as:

```
\DeclareOption{dvips}{\input{dvips.def}}
```

This means that when an author writes \usepackage[dvips]{graphics}, the file dvips.def is loaded. As another example, the a4paper option is declared in the article class to set the \paperheight and \paperwidth lengths:

```
\DeclareOption{a4paper}{%
  \setlength{\paperheight}{297mm}%
  \setlength{\paperwidth}{210mm}%
}
```

Sometimes a user will request an option which the class or package has not explicitly declared. By default this will produce a warning (for classes) or error (for packages); this behavior can be altered as follows:

```
\DeclareOption*{<code>}
```

For example, to make the package fred produce a warning rather than an error for unknown options, you could specify:

```
\DeclareOption*{%
   \PackageWarning{fred}{Unknown option `\CurrentOption'}%
}
```

Then, if an author writes \usepackage[foo]{fred}, they will get a warning Package fred Warning: Unknown option `foo'. As another example, the fontenc package tries to load a file <ENC>enc.def whenever the $\langle ENC \rangle$ option is used. This can be done by writing:

```
\DeclareOption*{%
   \input{\CurrentOption enc.def}%
}
```

It is possible to pass options on to another package or class, using the command \PassOptionsToPackage or \PassOptionsToClass (note that this is a specialised operation that works only for option names): see Section 4.5. For example, to pass every unknown option on to the article class, you can use:

```
\DeclareOption*{%
   \PassOptionsToClass{\CurrentOption}{article}%
}
```

If you do this then you should make sure you load the class at some later point, otherwise the options will never be processed!

So far, we have explained only how to declare options, not how to execute them. To process the options with which the file was called, you should use:

```
\ProcessOptions\relax
```

This executes the $\langle code \rangle$ for each option that was both specified and declared (see Section 6.4 for details of how this is done).

For example, if the jane package file contains:

```
\DeclareOption{foo}{\typeout{Saw foo.}}
\DeclareOption{baz}{\typeout{Saw baz.}}
\DeclareOption*{\typeout{What's \CurrentOption?}}
\ProcessOptions\relax
```

and an author writes \usepackage[foo,bar]{jane}, then they will see the messages Saw foo. and What's bar?

3.4 A minimal class file

Most of the work of a class or package is in defining new commands, or changing the appearance of documents. This is done in the body of the package, using commands such as \newcommand or \setlength.

There are four things that every class file must contain: these are a definition of \normalsize , values for \textwidth and \textheight and a specification for page-numbering. So a minimal document class file looks like this:

However, this class file will not support footnotes, marginals, floats, etc., nor will it provide any of the 2-letter font commands such as \rm; thus most classes will contain more than this minimum!

¹This class is now in the standard distribution, as minimal.cls.

3.5 Example: a local letter class

A company may have its own letter class, for setting letters in the company style. This section shows a simple implementation of such a class, although a real class would need more structure.

The class begins by announcing itself as neplet.cls.

```
\NeedsTeXFormat{LaTeX2e}
\ProvidesClass{neplet}[2022-06-01 NonExistent Press letter class]
```

Then this next bit passes any options on to the letter class, which is loaded with the a4paper option.

```
\DeclareOption*{\PassOptionsToClass{\CurrentOption}{letter}}
\ProcessOptions\relax
\LoadClass[a4paper]{letter}
```

In order to use the company letter head, it redefines the firstpage page style: this is the page style that is used on the first page of letters.

```
\renewcommand{\ps@firstpage}{%
  \renewcommand{\@oddhead}{<letterhead goes here>}%
  \renewcommand{\@oddfoot}{<letterfoot goes here>}%
}
```

And that's it!

3.6 Example: a newsletter class

A simple newsletter can be typeset with LATEX, using a variant of the article class. The class begins by announcing itself as smplnews.cls.

```
\NeedsTeXFormat{LaTeX2e}
\ProvidesClass{smplnews}[2022-06-01 The Simple News newsletter class]
\newcommand{\headlinecolor}{\normalcolor}
```

It passes most specified options on to the article class: apart from the onecolumn option, which is switched off, and the green option, which sets the headline in green.

```
\DeclareOption{onecolumn}{\OptionNotUsed}
\DeclareOption{green}{\renewcommand{\headlinecolor}{\color{green}}}
\DeclareOption*{\PassOptionsToClass{\CurrentOption}{article}}
\ProcessOptions\relax
```

It then loads the class article with the option twocolumn.

```
\LoadClass[twocolumn]{article}
```

Since the newsletter is to be printed in colour, it now loads the color package. The class does not specify a device driver option since this should be specified by the user of the smplnews class.

```
\RequirePackage{color}
```

The class then redefines \maketitle to produce the title in 72 pt Helvetica bold oblique, in the appropriate colour.

```
\renewcommand{\maketitle}{%
   \twocolumn[%
     \fontsize{72}{80}\fontfamily{phv}\fontseries{b}%
     \fontshape{s1}\selectfont\headlinecolor
     \@title
   ]%
}
```

It redefines \section and switches off section numbering.

```
\renewcommand{\section}{%
   \@startsection
     {section}{1}{0pt}{-1.5ex plus -1ex minus -.2ex}%
     {1ex plus .2ex}{\large\sffamily\slshape\headlinecolor}%
}
\setcounter{secnumdepth}{0}
```

It also sets the three essential things.

```
\renewcommand{\normalsize}{\fontsize{9}{10}\selectfont}
\setlength{\textwidth}{17.5cm}
\setlength{\textheight}{25cm}
```

In practice, a class would need more than this: it would provide commands for issue numbers, authors of articles, page styles and so on; but this skeleton gives a start. The ltnews class file is not much more complex than this one.

4 Commands for class and package writers

This section describes briefly each of the commands for class and package writers. To find out about other aspects of the system, you should also read \LaTeX A Document Preparation System, The \LaTeX Companion and \LaTeX 2ε for Authors.

4.1 Identification

The first group of commands discussed here are those used to identify your class or package file.

This command tells T_{EX} that this file should be processed using a format with name $\langle format\text{-}name \rangle$. You can use the optional argument $\langle release\text{-}date \rangle$ to further specify the earliest release date of the format that is needed. When the release date of the format is older than the one specified a warning will be generated. The standard $\langle format\text{-}name \rangle$ is LaTeX2e. The date, if present, must be in the form YYYY-MM-DD.

Example:

```
\NeedsTeXFormat{LaTeX2e}[2022-06-01]
```

People often don't know what date to put here. For the kernel, you can find out the right one by consulting changes.txt and select the release date of a new feature you are interested in. This is slightly different for packages as they are released throughout the year: you will need to consult their change history.

This declares that the current file contains the definitions for the document class $\langle class-name \rangle$ or package $\langle package-name \rangle$.

The optional $\langle release-info \rangle$, if used, must contain:

- the release date of this version of the file, in the form YYYY-MM-DD;
- optionally followed by a space and a short description, possibly including a version number.

The above syntax must be followed exactly so that this information can be used by \LoadClass or \documentclass (for classes) or \RequirePackage or \usepackage (for packages) to test that the release is not too old.

The whole of this $\langle release-info \rangle$ information is displayed by \listfiles and should therefore not be too long.

Example:

```
\ProvidesClass{article}[2022-06-01 v1.0 Standard LaTeX class]
\ProvidesPackage{ifthen}[2022-06-01 v1.0 Standard LaTeX package]
```

```
\ProvidesFile \{\langle file\text{-}name \rangle\}\ [\langle release\text{-}info \rangle]
```

This is similar to the two previous commands except that here the full filename, including the extension, must be given. It is used for declaring any files other than main class and package files.

Example:

```
\ProvidesFile{T1enc.def}[2022-06-01 v1.0 Standard LaTeX file]
```

Note that the phrase Standard LaTeX must not be used in the identification banner of any file other than those in the standard LATeX distribution.

4.2 Loading files

This group of commands can be used to create your own document class or package by building on existing classes or packages.

Packages and classes should use these commands to load other packages.

The use of $\ensuremath{\texttt{NequirePackage}}$ is the same as the author command $\ensuremath{\texttt{usepackage}}$. Examples:

```
\RequirePackage{ifthen}[2022-06-01]
\RequirePackageWithOptions{graphics}[2022-06-01]
```

```
\label{loadClass} $$ [\langle options-list\rangle] $$ {\langle class-name\rangle} $$ [\langle release-info\rangle] $$ $$ LoadClassWithOptions $$ {\langle class-name\rangle} $$ [\langle release-info\rangle] $$
```

These commands are for use *only* in class files, they cannot be used in packages files; they can be used at most once within a class file.

The use of \LoadClass is the same as the use of \documentclass to load a class file.

Examples:

```
\LoadClass{article}[2022-06-01] \LoadClassWithOptions{article}[2022-06-01]
```

The two WithOptions versions simply load the class (or package) file with exactly those options that are being used by the current file (class or package). See below, in 4.5, for further discussion of their use.

4.3 Delaying code

As noted earlier, a sophisticated hook system is available and described in lthooks. Here, we document a small set of convenient short names for common hooks.

These first two commands are also intended primarily for use within the $\langle code \rangle$ argument of \DeclareOption or \DeclareOption*.

```
\label{eq:lass} $$ \left( code \right) \right. $$ AtEndOfPackage $$ \left( code \right) \right. $$
```

These commands declare $\langle code \rangle$ that is saved away internally and then executed after processing the whole of the current class or package file.

Repeated use of these commands is permitted: the code in the arguments is stored (and later executed) in the order of their declarations.

```
\label{eq:local_action} $$ \AtEndDocument {$\langle code \rangle$} $$ AtEndDocument {$\langle code \rangle$} $$
```

These commands declare $\langle code \rangle$ to be saved internally and executed while LATEX is executing \begin{document} or \end{document}.

The $\langle code \rangle$ specified in the argument to \AtBeginDocument is executed near the end of the \begin{document} code, after the font selection tables have been set up. It is therefore a useful place to put code which needs to be executed after everything has been prepared for typesetting and when the normal font for the document is the current font.

The \AtBeginDocument hook should not be used for code that does any typesetting since the typeset result would be unpredictable.

The $\langle code \rangle$ specified in the argument to \AtEndDocument is executed at the beginning of the \end{document} code, before the final page is finished and before any leftover floating environments are processed. If some of the $\langle code \rangle$ is to be executed after these two processes, you should include a \clearpage at the appropriate point in $\langle code \rangle$.

Repeated use of these commands is permitted: the code in the arguments is stored (and later executed) in the order of their declarations.

4.4 Creating and using keyval options

As with any key-value input, using key-value pairs as package or class options has two parts: creating the key options and setting (using) them. Options

created in this way may be used after package loading as general key-value settings: this will depend on the nature of the underlying code.

This command creates a series of options from a comma-separated $\langle declarations \rangle$ list. Each entry in this list is a key–value pair, with the $\langle key \rangle$ having one or more $\langle properties \rangle$. A small number of 'basic' $\langle properties \rangle$ are described below. The full range of properties, provided by 13keys, can also be used for more powerful processing. See interface3 for the full details.

The basic properties provided here are

- .code execute arbitrary code
- .if sets a T_EX \if... switch
- .ifnot sets an inverted TFX \if... switch
- .store stores a value in a macro
- .usage defines whether the option can be given only when loading (load), in the preamble (preamble) or has no limitation on scope (general)

The part of the $\langle key \rangle$ before the $\langle property \rangle$ is the $\langle name \rangle$, with the $\langle value \rangle$ working with the $\langle property \rangle$ to define the behavior of the option.

For example, with

three options would be created. The option draft can be given anywhere in the preamble, and will set a switch called \if@mypkg@draft. The option name can

only be given during package loading, and will save whatever value it is given in \@mypkg@name. Finally, the option second-name can be given anywhere, and will save its value in \@mypkg@other@name.

Keys created *before* the use of \ProcessKeyOptions act as package options.

$\DeclareUnknownKeyHandler [\langle family \rangle] \{\langle code \rangle\}$

The command \DeclareUnknownKeyHandler may be used to define the behavior when an undefined key is encountered. The \(\langle code \rangle \) will receive the unknown key name as #1 and the value as #2. These can then be processed as appropriate, e.g. by forwarding to another package. The entire option is available as \CurrentOption, should it be necessary to pass on options which may or may not contain an = sign. For example, this may be used to pass an unknown option on to a non-keyval class such as article:

```
\DeclareUnknownKeyHandler{%
  \PassOptionsToClass{\CurrentOption}{article}
}
```

\ProcessKeyOptions [$\langle family \rangle$]

The \ProcessKeyOptions function is used to check the current option list against the keys defined for $\langle family \rangle$. Global (class) options and local (package) options are checked when this function is called in a package. The command will process *all* options given the the current package or class: there is no need to also apply \ProcessOptions .

\SetKeys $[\langle family \rangle]$ $\{\langle keyvals \rangle\}$

Sets (applies) the explicit list of $\langle keyvals \rangle$ for the $\langle family \rangle$: if the latter is not given, the value of \@currname is used. This command may be used within a package to set options before or after using \ProcessKeyOptions.

4.5 Passing options around

These two commands are also very useful within the $\langle code \rangle$ argument of options.

```
\label{limit} $$ \PassOptionsToPackage {$\langle options-list\rangle$} {$\langle package-name\rangle$} $$ \PassOptionsToClass {$\langle options-list\rangle$} {$\langle class-name\rangle$} $$
```

The command \PassOptionsToPackage passes the option names in $\langle options-list \rangle$ to package $\langle package-name \rangle$. This means that it adds the $\langle option-list \rangle$ to the list of options used by any future \RequirePackage or \Lossepackage command for package $\langle package-name \rangle$.

```
Example:
```

```
\PassOptionsToPackage{foo,bar}{fred}
\RequirePackage[baz]{fred}
```

is the same as:

```
\RequirePackage[foo,bar,baz]{fred}
```

Similarly, \PassOptionsToClass may be used in a class file to pass options to another class to be loaded with \LoadClass.

The effects and use of these two commands should be contrasted with those of the following two (documented above, in 4.2):

```
\LoadClassWithOptions
\RequirePackageWithOptions
```

The command \RequirePackageWithOptions is similar to \RequirePackage, but it always loads the required package with exactly the same option list as that being used by the current class or package, rather than with any option explicitly supplied or passed on by \PassOptionsToPackage.

The main purpose of \LoadClassWithOptions is to allow one class to simply build on another, for example:

```
\LoadClassWithOptions{article}
```

This should be compared with the slightly different construction

```
\DeclareOption*{\PassOptionsToClass{\CurrentOption}{article}}
\ProcessOptions\relax
\LoadClass{article}
```

As used above, the effects are more or less the same, but the first is a lot less to type; also the \LoadClassWithOptions method runs slightly quicker.

If, however, the class declares options of its own then the two constructions are different. Compare, for example:

```
\DeclareOption{landscape}{\@landscapetrue}
\ProcessOptions\relax
\LoadClassWithOptions{article}

with:

\DeclareOption{landscape}{\@landscapetrue}
\DeclareOption*{\PassOptionsToClass{\CurrentOption}{article}}
\ProcessOptions\relax
\LoadClass{article}
```

In the first example, the article class will be loaded with option landscape precisely when the current class is called with this option. By contrast, in the second example it will never be called with option landscape as in that case article is passed options only by the default option handler, but this handler is not used for landscape because that option is explicitly declared.

4.6 Safe file commands

These commands deal with file input; they ensure that the non-existence of a requested file can be handled in a user-friendly way.

```
\IfFileExists \{\langle file\text{-}name\rangle\}\ \{\langle true\rangle\}\ \{\langle false\rangle\}
```

If the file exists then the code specified in $\langle true \rangle$ is executed.

If the file does not exist then the code specified in $\langle false \rangle$ is executed.

This command does *not* input the file.

```
\InputIfFileExists \{\langle file\text{-}name\rangle\}\ \{\langle true\rangle\}\ \{\langle false\rangle\}
```

This inputs the file $\langle file\text{-}name \rangle$ if it exists and, immediately before the input, the code specified in $\langle true \rangle$ is executed.

If the file does not exist then the code specified in $\langle false \rangle$ is executed.

It is implemented using \IfFileExists.

4.7 Reporting errors, etc

These commands should be used by third party classes and packages to report errors, or to provide information to authors.

```
\label{lassError} $$ \ClassError {\langle class-name\rangle} {\langle error-text\rangle} {\langle help-text\rangle} $$ \PackageError {\langle package-name\rangle} {\langle error-text\rangle} {\langle help-text\rangle} $$
```

These produce an error message. The $\langle error\text{-}text\rangle$ is displayed and the ? error prompt is shown. If the user types h, they will be shown the $\langle help\text{-}text\rangle$.

Within the $\langle error-text \rangle$ and $\langle help-text \rangle$: \protect can be used to stop a command from expanding; \MessageBreak causes a line-break; and \space prints a space.

Note that the $\langle error-text \rangle$ will have a full stop added to it, so do not put one into the argument.

For example:

If the user types h, this will be shown:

```
Oh dear! Something's gone wrong.

Try typing <<return>> to proceed, ignoring \foo.
```

```
\label{lem:continuous} $$ \classWarning {\class-name\} {\class-name\} {\classWarning-text\} $$ \classWarningNoLine {\class-name\} {\class-name\} {\class-name\} $$ \classInfo {\class-name\} {\class-name\} {\class-name\} $$ \classInfo {\class-name\} {\class-name\} $$ \class{\class-name\} $$ \c
```

The four Warning commands are similar to the error commands, except that they produce only a warning on the screen, with no error prompt.

The first two, Warning versions, also show the line number where the warning occurred, whilst the second two, WarningNoLine versions, do not.

The two Info commands are similar except that they log the information only in the transcript file, including the line number. There are no NoLine versions of these two.

Within the \(\lambda\text\rangle\) and \(\lambda\text\rangle\): \protect can be used to stop a command from expanding; \(\mathbb{MessageBreak}\) causes a line-break; and \space prints a space. Also, these should not end with a full stop as one is automatically added.

5 Miscellaneous commands, etc.

5.1 Layout parameters

\paperheight \paperwidth

These two parameters are usually set by the class to be the size of the paper being used. This should be actual paper size, unlike \textwidth and \textheight which are the size of the main text body within the margins.

5.2 Case changing

```
\label{eq:makeUppercase} $$\operatorname{d}(text)$$ $$\operatorname{d}(text)$$ $$\operatorname{d}(text)$$ $$\operatorname{d}(text)$$
```

As described in usrguide, case changing for text should be carried out using the commands \MakeUppercase, \MakeLowercase and \MakeTitlecase. If you need to change the case of programmatic material, the team strongly suggest using the L3 programming layer commands in the str module. If you do not wish to do this, you should use the TEX \uppercase and \lowercase primitives in this situation only.

5.3 Better user-defined math display environments

\ignorespacesafterend

Suppose that you want to define an environment for displaying text that is numbered as an equation. A straightforward way to do this is as follows:

```
\newenvironment{texteqn}
    {\begin{equation}
     \begin{minipage}{0.9\linewidth}}
     {\end{minipage}
     \end{equation}}
```

However, if you have tried this then you will probably have noticed that it does not work perfectly when used in the middle of a paragraph because an inter-word space appears at the beginning of the first line after the environment.

You can avoid this problem using \ignorespacesafterend; it should be inserted as shown here:

```
\newenvironment{texteqn}
    {\begin{equation}
      \begin{minipage}{0.9\linewidth}}
      {\end{minipage}
      \end{equation}
      \ignorespacesafterend}
```

This command may also have other uses.

5.4 Normalising spacing

\normalsfcodes

This command should be used to restore the normal settings of the parameters that affect spacing between words, sentences, etc.

An important use of this feature is to correct a problem, reported by Donald Arseneau, that punctuation in page headers has always (in all known TEX formats) been potentially wrong whenever a page break happens while a local setting of the space codes is in effect. These space codes are changed by, for example, the command \frenchspacing) and the verbatim environment.

It is normally given the correct definition automatically in \begin{document} and so need not be explicitly set; however, if it is explicitly made non-empty in a class file then automatic default setting will be over-ridden.

5.5 Querying localisation

Localisation information is needed to customise a range of outputs. The LATEX kernel does not itself manage localisation, which is well-served by the bundles babel and polyglossia. To allow the kernel and other packages to access the current localisation information provided by babel or polyglossia, the command \BCPdata is defined by the kernel. The initial kernel definition expands to tag parts for en-US, as the kernel does not track localisation but does start out with a broadly US English setup. However, if babel or polyglossia are loaded, it is redefined expand to the BCP-47 information from the appropriate package. The supported arguments are the BCP-47 tag breakdowns:

- tag The full BCP-47 tag (e.g. en-US)
- language (e.g., de)
- region (e.g., AT)
- script (e.g., Latn)

- variant (e.g., 1901)
- extension.t (transformation, e.g., en-t-ja)
- extension.u (additional locale information, e.g., ar-u-nu-latn)
- extension.x (private use area, e.g., la-x-classic)

The information for the *main* language for a document is be provided if these are prefixed by main., e.g. main.language will expand to the main language even if another language is currently active.

In addition to the tag breakdown, the following semantic arguments are supported

• casing The tag for case changing, e.g. el-x-iota could be selected rather than el to select a capital adscript iota on uppercasing an *ypogegrammeni*

For example, the case changing command \MakeUppercase is (conceptually) defined as

```
\ExpandArgs{e}\MakeUppercaseAux{\BCPdata{casing}}{#1}
```

where #1 is the user input and the first argument to \MakeUppercaseAux takes two arguments, the locale and input text.

5.6 Extended and expandable references of properties

A property is something that LATEX can track while processing the document, such as a page number, a heading number, other counter values, a heading title, a position on the page, etc. The current value of such properties can be labeled and written to the aux-file. It can then be referenced in the next compilation, similar to the way the standard \label/\ref commands work (they record/reference a fixed set of properties: label, page, title, and target).

$\verb|\RecordProperties|{\langle label\rangle}|{\langle list\ of\ properties\rangle}|$

This command writes the value(s) of the $\langle list\ of\ properties \rangle$ aux-file labeled by $\langle label \rangle$. Recorded are either the values current when \RecordProperties is

called or the value current when the next shipout happens—which depends on the declaration for each property. The arguments $\langle label \rangle$ and $\langle list\ of\ properties \rangle$ can contain commands that are expanded. $\langle label \rangle$ can expand to an arbitrary string (as long as it can safely be written to the aux-file) but note that the label names of \label and \RecordProperties share a singe namespace. This means that you get a Label `A' multiply defined warning with the following code:

\label{A}\RecordProperties{A}{abspage}

$\RefProperty{\langle label \rangle}{\langle property \rangle}$

This command allows to reference the value of the property $\langle property \rangle$ recorded in the previous run and labeled by $\langle label \rangle$. Differently to the standard \ref command the command is expandable and the value can for example—if it is a number—be used in an assignment.²

```
\section{A section}
\RecordProperties{mylabel}{pagenum, counter}
\RefProperty{mylabel}{counter} % outputs section
\setcounter{mycounter}{\RefProperty{mylabel}{pagenum}}}
```

As \RefProperty is expandable it can not issue a rerun warning if a label is not found. If needed such a warning can be forced by the following command:

$\RefUndefinedWarn{\langle label \rangle}{\langle property \rangle}$

LATEX predefines a set of properties, this set contains also the properties stored by the standard \label command. In the list below "default" indicates the value returned when the value is not yet known (i.e., if it wasn't recorded in the previous run and "at shipout" means that this property is not recorded immediately when \RecordProperties is used but during the next \shipout.

abspage (default: 0, at shipout) The absolute value of the current page: starts at 1 and increases monotonically at each shipout.

 $^{^2}$ For this to work the default value for the property would need to be a number too, because recorded values aren't known in the first IATeX run.

- page (default: 0, at shipout) The current page as given by \thepage: this
 may or may not be a numerical value, depending on the current style.
 Contrast with abspage. You get this value also with the standard \label/\pageref.
- pagenum (default: 0, at shipout) The current page as arabic number. This is suitable for integer operations and comparisions.
- label (default: ??) The content of \@currentlabel. This is the value that you get also with the standard \label/\ref.
- title (default: \textbf{??}) The content of \@currentlabelname. This command is filled beside others by the nameref package and some classes (e.g. memoir) and typically gives the title defined in the document by some sectioning command
- target (default: $\langle empty \rangle$) The content of \@currentHref. This command is normally filled by hyperref and holds the name of the last destination it created.
- pagetarget (default: $\langle empty \rangle$, at shipout) The content of \@currentHpage. This command is filled by hyperref (version v7.01c or newer) and holds the name of the last page anchor it created.
- counter (default: $\langle empty \rangle$) The content of \@currentcounter. This command contains after a \refstepcounter the name of the counter.
- xpos, ypos (default: 0, at shipout) These properties records the x and y coordinates of a point previously stored with \pdfsavepos/\savepos.

 E.g. (if bidi is used it can be necessary to save the position before and after the label):

```
\pdfsavepos
\RecordProperties{myposition}{xpos,ypos}%
\pdfsavepos
```

Class and package authors can define more properties to store other values they are interested in.

```
\label{eq:local_cont} $$\operatorname{Property}(\langle name\rangle)_{(\langle setpoint\rangle)_{(\langle default\rangle)_{(\langle code\rangle)_{(\langle setpoint\rangle)_{(\langle code\rangle)_{(\langle setpoint\rangle)_{(\langle code\rangle)_{(\langle setpoint\rangle)_{(\langle setpoint\rangle)_{(
```

These commands declare or change a property $\langle name \rangle^3$. If a new property is declared within a package it is suggested that its name is always structured as follows: $\langle package\text{-}name \rangle / \langle property\text{-}name \rangle$. $\langle setpoint \rangle$ is either now or shipout and decides if the value is written directly or at the next shipout. $\langle default \rangle$ is used if the property is referenced but not yet known, e.g., in the first run. $\langle code \rangle$ is the code executed when storing the value. For example, the pagenum property is declared as

```
\NewProperty{pagenum}{shipout}{0}{\the\value{page}}
```

The commands related to properties are offered as a set of CamelCase commands for traditional LaTeX 2_{ε} packages (and for use in the document preamble if needed) as well as expl3 commands for modern packages, that use the L3 programming layer of LaTeX. The expl3 commands and more details can be found in ltproperties-doc.pdf.

5.7 Preparing link targets

Active links in a document need targets to which they can jump to. Such targets are often created automatically (if the package hyperref is loaded) by the \refstepcounter command but there are also cases where class or package authors need to add a target manually, for example, in unnumbered sectioning commands or in environments. For this LATEX provides the following commands. Without hyperref they do nothing or insert only a whatsits (to ensure that spacing doesn't change when hyperref is loaded), with hyperref they add the necessary targets. Details about the behavior and the arguments of the following commands can by found in the hyperref package in hyperref-linktarget.pdf.

```
\label{linkTarget} $$ \MakeLinkTarget[\langle prefix\rangle] {\langle counter\rangle} $$ $$ \MakeLinkTarget*{\langle target\ name\rangle} $$
```

This command prepares the creations of targets.

³Only change properties that you have declared. The declarations of standard properties of LATEX and properties of other packages should never be altered!

```
\LinkTargetOn \LinkTargetOff
```

These commands allow to enable and disable locally the creation of targets. This can be useful to suppress targets otherwise created automatically by \refstepcounter.

```
\MextLinkTarget{\langle target\ name \rangle}
```

This changes the name of the next target that will be created.

6 Commands superseded for new material

A small number of commands were introduced as part of LATEX 2_{ε} in the mid-1990s, are widely used but have been superseded by more modern methods. These are covered here as they are likely to be encountered routinely in existing classes and packages.

6.1 Defining commands

The *-forms of these commands should be used to define commands that are not, in TeX terms, long. This can be useful for error-trapping with commands whose arguments are not intended to contain whole paragraphs of text.

This command takes the same arguments as $\mbox{\ensuremath{\mbox{\ensuremath}\ensuremath{\mbox{\ensuremath{\mbox{\ensuremath}\ensu$

For example, if \seq is defined as follows:

```
\DeclareRobustCommand{\seq}[2][n]{%
  \ifmmode
  #1_{1}\ldots#1_{#2}%
```

```
\else
   \PackageWarning{fred}{You can't use \protect\seq\space in text}%
\fi
}
```

Then the command \seq can be used in moving arguments, even though \ifmmode cannot, for example:

```
\section{Stuff about sequences $\seq{x}$}
```

Note also that there is no need to put a \relax before the \ifmmode at the beginning of the definition; this is because the protection given by this \relax against expansion at the wrong time will be provided internally.

```
\label{lem:checkCommand} $$ \ \checkCommand {\cmd} \ [\num\rangle] \ [\default\rangle] \ {\definition} $$ \ \checkCommand* {\cmd} \ [\num\rangle] \ [\default\rangle] \ {\definition} $$
```

This takes the same arguments as $\mbox{\ensuremath{\text{Newcommand}}}$ but, rather than define $\langle cmd \rangle$, it just checks that the current definition of $\langle cmd \rangle$ is exactly as given by $\langle definition \rangle$. An error is raised if these definitions differ.

This command is useful for checking the state of the system before your package starts altering the definitions of commands. It allows you to check, in particular, that no other package has redefined the same command.

6.2 Option declaration

The following commands deal with the declaration and handling of options to document classes and packages using a classical 'simple text' approach. Every option name must be a 'LATEX name'.

There are some commands designed especially for use within the $\langle code \rangle$ argument of these commands (see below).

```
\label{eq:decomp} $$ \end{areOption} {\end{areOption-} name} $$ {\code}$ $$
```

This makes $\langle option\text{-}name \rangle$ a 'declared option' of the class or package in which it is put.

The $\langle code \rangle$ argument contains the code to be executed if that option is specified for the class or package; it can contain any valid LATEX $2_{\mathcal{E}}$ construct.

Example:

\DeclareOption{twoside}{\@twosidetrue}

\DeclareOption* $\{\langle code \rangle\}$

This declares the $\langle code \rangle$ to be executed for every option which is specified for, but otherwise not explicitly declared by, the class or package; this code is called the 'default option code' and it can contain any valid LATEX 2_{ε} construct.

If a class file contains no **\DeclareOption*** then, by default, all specified but undeclared options for that class will be silently passed to all packages (as will the specified and declared options for that class).

If a package file contains no \DeclareOption* then, by default, each specified but undeclared option for that package will produce an error.

6.3 Commands within option code

These two commands can be used only within the $\langle code \rangle$ argument of either \DeclareOption or \DeclareOption*. Other commands commonly used within these arguments can be found in the next few subsections.

\CurrentOption

This expands to the name of the current option.

\OptionNotUsed

This causes the current option to be added to the list of 'unused options'.

6.4 Option processing

\ProcessOptions

This command executes the $\langle code \rangle$ for each selected option.

We shall first describe how \ProcessOptions works in a package file, and then how this differs in a class file.

To understand in detail what \ProcessOptions does in a package file, you have to know the difference between *local* and *global* options.

• Local options are those which have been explicitly specified for this particular package in the *(options)* argument of any of these:

```
\PassOptionsToPackage{<options>} \usepackage[<options>]
\RequirePackage[<options>]
```

• Global options are any other options that are specified by the author in the *options* argument of *documentclass*[*options*>].

For example, suppose that a document begins:

```
\documentclass[german,twocolumn]{article}
\usepackage{gerhardt}
```

whilst package gerhardt calls package fred with:

```
\PassOptionsToPackage{german,dvips,a4paper}{fred}
\RequirePackage[errorshow]{fred}
```

then:

- fred's local options are german, dvips, a4paper and errorshow;
- fred's only global option is twocolumn.

When \ProcessOptions is called, the following happen.

• First, for each option so far declared in fred.sty by \DeclareOption, it looks to see if that option is either a global or a local option for fred: if it is then the corresponding code is executed.

This is done in the order in which these options were declared in fred.sty.

• Then, for each remaining local option, the command \ds@<option> is executed if it has been defined somewhere (other than by a \DeclareOption); otherwise, the 'default option code' is executed. If no default option code has been declared then an error message is produced.

This is done in the order in which these options were specified.

Throughout this process, the system ensures that the code declared for an option is executed at most once.

Returning to the example, if fred.sty contains:

```
\DeclareOption{dvips}{\typeout{DVIPS}}
\DeclareOption{german}{\typeout{GERMAN}}
\DeclareOption{french}{\typeout{FRENCH}}
\DeclareOption*{\PackageWarning{fred}{Unknown `\CurrentOption'}}
\ProcessOptions\relax
```

then the result of processing this document will be:

```
DVIPS
GERMAN
Package fred Warning: Unknown `a4paper'.
Package fred Warning: Unknown `errorshow'.
```

Note the following:

- the code for the dvips option is executed before that for the german option, because that is the order in which they are declared in fred.sty;
- the code for the german option is executed only once, when the declared options are being processed;
- the a4paper and errorshow options produce the warning from the code declared by \DeclareOption* (in the order in which they were specified), whilst the twocolumn option does not: this is because twocolumn is a global option.

In a class file, \ProcessOptions works in the same way, except that: all options are local; and the default value for $\DeclareOption*$ is \OptionNotUsed rather than an error.

Note that, because \ProcessOptions has a *-form, it is wise to follow the non-star form with \relax, as in the previous examples, since this prevents unnecessary look ahead and possibly misleading error messages being issued.

\ProcessOptions*

This is like \ProcessOptions but it executes the options in the order specified in the calling commands, rather than in the order of declaration in the class or package. For a package this means that the global options are processed first.

\ExecuteOptions $\{\langle options\text{-}list\rangle\}$

It can be used to provide a 'default option list' just before \ProcessOptions. For example, suppose that in a class file you want to set up the default design to be: two-sided printing; 11pt fonts; in two columns. Then it could specify:

\ExecuteOptions{11pt,twoside,twocolumn}