A Document Class and a Package for Handling Multi-File Projects

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Abstract

The subfiles package allows authors to split a document into one main file and several subsidiary files (subfiles) akin to the \input command, with the added benefit of making the subfiles compilable on their own. This is achieved by reusing the preamble of the main file also for the subfiles.

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1 Introduction

The LATEX commands \include and \input allow the user to split the TEX source of a document into several input files. This is useful when creating documents with many chapters, but also for handling large tables, figures and code samples, which require a considerable amount of trial-and-errors.

In this process the rest of the document is of little use, and can even interfere. For example, error messages may indicate not only the wrong line number, but may point to the wrong file. Frequently, one ends up wanting to work only on the new file:

- Create a new file, and copy-paste the preamble of the main file into it.
- Work on this file, typeset it *alone* as many times as necessary.
- Finally, when the result is satisfactory, delete the preamble from the file (alongside with \end{document}!), and \include or \input it from the main file.

It is desirable to reduce these three steps to the interesting, middle one. Each new, subordinate file (henceforth 'subfile') should behave both as a self-sufficient LATEX document and as part of the whole project, depending on whether it is LATEXed individually or \included/\input from the main document. This is what the class subfiles.cls and the package subfiles.sty are intended for.

2 Basic usage

subfiles.sty The main file, i.e., the file with the preamble to be shared with the subfiles, has to load the package subfiles:

```
\documentclass[...]{...}
\usepackage{subfiles}
\begin{document}
```

\subfile Subordinate files (subfiles) are loaded from the main file or from other subfiles with the command

```
\left\langle subfile_name \right\rangle
```

subfiles.cls The subfiles have to start with the line

```
\documentclass[\langle main\_file\_name \rangle] \{subfiles\}
```

which loads the class subfiles. Its only 'option', which is actually mandatory, gives the name of the main file. This name follows T_EX conventions: .tex is the default extension, the path has to be provided if the main file is in a different directory, and directories in the path have to be separated by / (not \backslash). Thus, we have the following structure.

```
main file subfile

\documentclass[...]{...}
\shared preamble \begin{document}
\usepackage{subfiles}
\usepackage{subfiles}
\...
\subfile{\subfile_name}}
\...
\end{document}
```

Now there are two possibilities.

- If LATEX is run on the subfile, the line \documentclass[..]{subfiles} is replaced by the preamble of the main file (including its \documentclass command). The rest of the subfile is processed normally.
- If LATEX is run on the main file, the subfile is loaded like with an \input command, except that the preamble of the subfile up to \begin{document} as well as \end{document} and the lines following it are ignored.

3 Advanced usage

3.1 Including files instead of inputting them

\subfileinclude

In plain IATEX, you can use either \input or \include to load a file. In most cases the first is appropriate, but sometimes there are reasons to prefer the latter. Internally, the \subfile command uses \input. For those cases where you need \include, the package provides the command

 $\sline {\langle subfile_name \rangle}$

3.2 Fixing pathes

\cubfiv

Whenever an error message of LATEX or an external program indicates that a file cannot be found, the reason may be that the missing file has to be addressed by varying pathes, depending on which file is typeset. In such a case, it may help to apply the command \subfix to the file or path names. Examples:

package	command when used with subfiles
biblatex	$\addbibresource{\subfix{\langle file \rangle}}$
bibunits	$\begin{array}{l} \begin{array}{l} \begin{array}{l} \begin{array}{l} \\ \end{array} \end{array} \end{array} $
	$\defaultbibliography{\subfix{\langle file1\rangle},}$

\bibliography \graphicspath

Some commands already apply the fix on the fly. At the moment these are the standard LATEX command \bibliography and \graphicspath from the graphics/graphicx package.

3.3 Conditional execution of commands

\ifSubfilesClassLoaded

The command \ifSubfilesClassLoaded is useful to execute commands conditionally, depending on whether the main file is typeset or a subfile.

```
\ifSubfilesClassLoaded{% then branch
   ... commands executed when the subfile is typeset ...
}{% else branch
   ... commands executed when the main file is typeset ...
}
```

As an example, this can be used to add the bibliography to the main document or to the subdocument, whichever is typeset:

```
main file subfile

\documentclass[...]{...}
\usepackage{subfiles} \begin{document}
\bibliographystyle{alpha} \...
\begin{document}
\iffsubfilesClassLoaded{%}
\iffsubfilesClassLoaded{%}
\text{subfile}{\subfile_name}} \} \}{}
\underset{subfile-name}
\head{document}
\langle end{document}
```

3.4 Unusual locations for placing definitions and text

Starting with version 2.0, the subfiles package treats sub-preambles and text after \end{document} as one would expect: The preamble of subfiles is skipped when loaded with \subfile, and everything after \end{document} is ignored. In most cases this is what you want.

[v1] For reasons of compatibility, the option v1 restores the behaviour of previous versions.

\usepackage[v1]{subfiles}

This will have three effects.

Code after the end of the main document is added to the preamble of the subfiles, but is ignored when typesetting the main file. Here, one can add commands that are to be processed as part of the preamble when the subfiles are typeset on their one. But this also means that any syntax error after \end{document} will ruin the LATEXing of the subfile(s).

Code in the preamble of a subfile is processed as part of the text when typesetting the main file, but as part of the preamble when typesetting the subfile. This means that with the option v1, the preamble of a subfile can only contain stuff that is acceptable for both, the preamble and the text area. One should also keep in mind that each subfile is input within a group, so definitions made here may not work outside.

Code after \setminus end{document} in a subfile is treated like the code preceding it when the subfile is loaded from the main file, but is ignored when typesetting

the subfile. The code after \end{document} behaves as if following the \subfile command in the main file, except that it is still part of the group enclosing the subfile. As a consequence, empty lines at the end of the subfile lead to a new paragraph in the main document, even if the \subfile command is immediately followed by text.

4 Use cases

4.1 Hierarchy of directories

Sometimes it is desirable to put a subfile together with its images and supplementary files into its own directory. The difficulty now is that these additional files have to be addressed by different pathes depending on whether the main file or the subfile is typeset. As of version 1.3, the subfiles package handles this problem by using the import package.

As an example, consider the following hierarchy of files:

```
main.tex
mypreamble.tex
dir1/subfile1.tex
dir1/image1.jpg
dir1/text1.tex
dir1/dir2/subfile2.tex
dir1/dir2/image2.jpg
dir1/dir2/text2.tex
```

where main, subfile1, and subfile2 have the following contents:

```
main.texsubfile1.tex\documentclass{article}\documentclass[../main]{subfiles}\input{mypreamble}\begin{document}\usepackage{graphicx}\input{text1}\usepackage{subfiles}\includegraphics{image1.jpg}\begin{document}\subfile{dir2/subfile2}\subfile{dir1/subfile1}\end{document}
```

```
subfile2.tex
\documentclass[../../main]{subfiles}
\begin{document}
\input{text2}
\includegraphics{image2.jpg}
\end{document}
```

Then each of the three files can be typeset individually in its respective directory, where LATEX is able to locate all included text files and images.

4.2 Cross-referencing between subfiles

When working with multiple subfiles under a main file, say main.tex, one may want to refer in subfile A.tex to labels in subfile B.tex. To make this work, load the package xr in the preamble of the main file and add an \externaldocument command after loading the subfiles package:

```
\usepackage{xr}
\usepackage{subfiles}
\externaldocument[M-]{\subfix{main}}}
```

In the \externaldocument command, main is the name of the main document. Moreover, M- is an arbitrary sequence of characters that is added as prefix to the labels. The \subfix command is only needed if the subfiles are not in the same directory as the main file, but it doesn't hurt if you add it in any case.

To cross-reference between documents, add labels as usual. Suppose you have \label{mylabel} in any of the files. Then you can use \ref{M-mylabel} and \pageref{M-mylabel} to obtain the (page) number that the label refers to in the main document.

Note that you first have to compile $\mathtt{main.tex}$. This generates $\mathtt{main.aux}$, which then can be loaded by the subfiles to provide the information for the labels prefixed with $\mathtt{M-}$.

4.3 Avoiding extra spaces

Sometimes you may want to load the contents of a subfile without white space separating it from the contents of the main file. In this respect, \subfile behaves similar to \input. Any space or newline before and after the \subfile command will appear in the typeset document, as will any white space between the last character of the subfile and \end{document}. Therefore, to load the contents of a subfile without intervening spaces, you have either to add comment signs:

main.tex	sub.tex
	\documentclass[main.tex]{subfiles}
text before%	\begin{document}
\subfile{sub.tex}%	contents of subfile%
text after	\end{document}

or to put everything on the same line:

text before\subfile{sub.tex}text after
contents of subfile\end{document}

5 Troubleshooting

Here are some hints that solve most problems.

- 1. Make sure to use the most recent version of the subfiles package, available from CTAN¹ and Github².
- 2. Make sure that \usepackage{subfiles} appears near the end of the main preamble. If you need the package standalone, then it has to be loaded before subfiles.
- 3. If some external program that cooperates with TEX, like bibtex or biber, complains about not being able to find a file, locate the name of the file in the LATEX source and replace \(\frac{filename}{} \) by \subfix{\(\frac{filename}{} \)}.
- 4. If nothing of the above helps, ask the nice people on tex.stackexchange³ or file an issue in the bug tracker of the Github repository⁴.

6 Dependencies

The import package by Donald Arsenau is needed to load subfiles from different directories. When the standalone package is used, the subfiles package requires the xpatch package by Enrico Gregorio to patch the command \includestandalone. Both packages are part of the standard TFX distributions.

7 Version history

- v1.1: Initial version by Federico Garcia. (Subsequent versions by Gernot Salzer.)
- v1.2: Incompatibility with classes and packages removed that modify the \document command, like the class revtex4.
- v1.3: Use of import package to handle directory hierarchies.
 - \ignorespaces added to avoid spurious spaces.
 - Incompatibility with commands removed that expect \document to be equal to \@onlypreamble after the preamble. Thanks to Eric Domenjoud for analysing the problem.
- v1.4: Incompatibility with memoir class and comment package removed.
 - Bug '\unskip cannot be used in vertical mode' fixed.
- v1.5: Command \subfileinclude added.
 - Basic support for bibtex related bibliographies in subfiles added. Seems to suffice also for sub-bibliographies with the package chapterbib.
 - Support for sub-bibliographies with package bibunits added.

¹https://ctan.org/pkg/subfiles

²https://github.com/gsalzer/subfiles

³https://tex.stackexchange.com/

⁴https://github.com/gsalzer/subfiles/issues

- v1.6: Support for sub-bibliographies with package bibunits dropped, in favor of \subfix.
 - Command \subfix added.
 - Incompatibility with standalone class removed.
 - The options of the main class are now also processed when typesetting a subfile; before they were ignored. Thanks to Ján Kl'uka for analysing the problem.
- v2.0: Incompatibility with LATEX Oct. 2020 removed. Thanks to Ulrike Fischer from the LATEX3 team for the timely warning.
 - By default, text after \end{document} as well as the preamble of subfiles, when loaded with \subfile, are ignored now. The old behaviour is available via the new package option v1.
 - Command \ifSubfilesClassLoaded added and documentation regarding the use of the \bibliography command corrected. Thanks to Github user alan-isaac for reporting the issue.
 - Subfiles now can have the same name as the main file. Thanks to Github user June-6th for reporting the issue.
 - Problem with the search path for images resolved. Thanks to Github user maxnick for reporting the issue.
- v2.1 Bugfix: In some situations, the hooks of \begin{document} and \end{document} were triggered when loading a subfile. This occurred in particular with packages for handling CJK languages. Thanks to Github user yuishin-kikuchi for reporting the issue.
 - Section about cross-referencing added. Thanks to Github user ndvanforeest for the input.
- v2.2 Bugfix: The bugfix of v2.1 introduced an incompatibility with tabular environments in subfiles. Thanks to yuishin-kikuchi and nvmnghia on Github for reporting the issue. Kudos to Phelype Oleinik on tex.stackexchange.com for explaining the intricacies of the tabular environment and its interaction with the \end command.

8 The Implementation

8.1 The class

```
1 \NeedsTeXFormat{LaTeX2e}
2 \ProvidesClass{subfiles}[2020/11/14 v2.2 Multi-file projects (class)]
3 \DeclareOption*{%
4 \typeout{Preamble taken from file '\CurrentOption'}%
5 \let\preambleOfile\CurrentOption
6 }
7 \ProcessOptions
```

After processing the option of the subfiles class, we reset \@classoptionslist such that the options in the main file will be processed.

```
8 \let\@classoptionslist\relax
```

To handle subfiles in separate directories, we use the import package. We load it now, since it resets the macro \import@path.

9 \RequirePackage{import}

We redefine \documentclass to load the class of the main document.

- 11 \def\documentclass{%
- 12 \let\documentclass\subfiles@documentclass
- 13 \LoadClass

14 }

In earlier versions, we used \subimport to load the preamble of the main file, which has the unwanted effect of undoing changes to the graphics path. Therefore we use \input and initialize \import@path and \input@path to the path of the main file. We use the internal LATEX macro \filename@parse to obtain this path.

- 15 \filename@parse{\preamble@file}
- 16 \edef\import@path{\filename@area}
- 17 \edef\input@path{{\filename@area}}
- 18 \input{\preamble@file}

After loading the preamble of the main file, we reset \import@path. Since the preamble may have changed the catcode of the @ sign, we make it (again) a letter. Better safe than sorry.

```
19 {\makeatletter
```

20 \gdef\import@path{}

21 }

8.2 The package

```
22 \NeedsTeXFormat{LaTeX2e}
```

23 \ProvidesPackage{subfiles}[2020/11/14 v2.2 Multi-file projects (package)]

Auxiliary commands

When redefining the \end command, we have to have to keep it expandable to a certain depth. Therefore we need an expandable way to compare strings. We borrow the function from LaTeX's expl3 part.

```
24 \ExplSyntaxOn
25 \cs_new_eq:NN \subfiles@StrIfEqTF \str_if_eq:nnTF
26 \ExplSyntaxOff
```

The macro \subfiles@renewBeginDocument{ $\langle code \rangle$ } redefines \begin such that the next \begin{document} executes $\langle code \rangle$ (and then restores the original definition of \begin).

```
27 \def\subfiles@renewBeginDocument#1{%
```

- 28 \let\subfiles@begin\begin
- 29 \def\begin##1{%
- 30 \subfiles@StrIfEqTF{##1}{document}{%

```
31  \let\begin\subfiles@begin
32  #1%
33  }{%
34  \csname subfiles@begin\endcsname{##1}%
35  }%
36  }%
37}
```

The macro \subfiles@renewEndDocument{ $\langle code \rangle$ } redefines \end such that the next \end{document} executes $\langle code \rangle$ (and then restores the original definition of \end). This macro is more complex then the previous one, as we have to ensure that \expandafter\expandafter\expandafter\relax\end{env} expands to \relax\end{env}. This is necessary for tabulars to work correctly.

```
38 \def\subfiles@saveEndTo#1{\expandafter\let\expandafter#1\csname end \endcsname}
39 \def\subfiles@restoreEndFrom{\expandafter\let\csname end \endcsname}
40 \def\subfiles@renewEndDocument#1{%
41
    \ifcsname subfiles@end\endcsname
42
    \else
      \subfiles@saveEndTo\subfiles@end
43
44
45
    \expandafter\def\csname end \endcsname##1{%
46
      \romannumeral
47
      \subfiles@StrIfEqTF{##1}{document}{%
48
        \subfiles@restoreEndFrom\subfiles@end
49
        #1%
50
      }{%
51
        \expandafter\expandafter\expandafter\z@\subfiles@end{##1}%
52
53
      }%
    }%
54
55 }
```

Handling the main document

When the main document is loaded from a subfile, the preamble is read, but the document itself is skipped. The end of the preamble is marked by \begin{document}. In version 1.x of the subfiles package, everything up to (and including) \end{document} is skipped, but the lines following it are treated again as part of the preamble. The macro \subfiles@handleMainDocumentVi redefines \begin{document} accordingly.

```
56 \def\subfiles@handleMainDocumentVi{%
57 \long\def\subfiles@skipToEndDocument##1\end##2{%
58 \subfiles@StrIfEqTF{##2}{document}{\ignorespaces}{\subfiles@skipToEndDocument}%
59 }%
60 \subfiles@renewBeginDocument{%
61 \subfiles@skipToEndDocument
62 }%
63 }
```

In version 2.x of the subfiles package, everything following \begin{document} is ignored. The macro \subfiles@handleMainDocumentVii redefines this command accordingly.

```
64 \def\subfiles@handleMainDocumentVii{%
65 \subfiles@renewBeginDocument{%
66 \endinput
67 \ignorespaces
68 }%
69 }
```

Handling subfiles

When a subfile is loaded, the preamble and $\end{document}$ have to be ignored. More precisely, in older versions (v1.x), the following happens:

- \documentclass[...]{subfiles} is ignored.
- The contents of the preamble becomes part of the text.
- \begin{document} is ignored.
- \end{document} is ignored.
- Any lines after \end{document} are also part of the text.

```
70 \def\subfiles@handleSubDocumentVi{%
    \let\subfiles@documentclass\documentclass
71
    \def\documentclass{%
72
      \@ifnextchar[\subfiles@documentclass@{\subfiles@documentclass@[]}%
73
74
    \def\subfiles@documentclass@[##1]##2{%
75
      \let\documentclass\subfiles@documentclass
76
77
      \ignorespaces
78
    \subfiles@renewBeginDocument{%
79
80
      \subfiles@renewEndDocument\ignorespaces
81
      \ignorespaces
82
   }%
```

In newer versions (v2.x), the following happens:

- The preamble, up to \begin{document}, is ignored.
- \end{document} as well as any lines after it are ignored.

```
84 \def\subfiles@handleSubDocumentVii{%
85 \let\subfiles@documentclass\documentclass
86 \long\def\documentclass##1\begin##2{%
87 \subfiles@StrIfEqTF{##2}{document}{%
88 \let\documentclass\subfiles@documentclass
89 \subfiles@renewEndDocument{%
```

```
90 \endinput
91 \ignorespaces
92 }%
93 \ignorespaces
94 }{\documentclass}
95 }%
```

Processing the package options

The package has currently only one option, v1, which affects the way how the text after \end{document} and in the preamble of subfiles is handled. We initialize the macros for handling main and sub documents with the behavior of version 2.x.

```
97 \let\subfiles@handleMainDocument\subfiles@handleMainDocumentVii
98 \let\subfiles@handleSubDocument\subfiles@handleSubDocumentVii
When option v1 is present, the macros are set to the behavior of version 1.x.
99 \DeclareOption{v1}{%
100 \let\subfiles@handleMainDocument\subfiles@handleMainDocumentVi
101 \let\subfiles@handleSubDocument\subfiles@handleSubDocumentVi
102 }
```

103 \DeclareOption*{\PackageWarning{subfiles}{Option '\CurrentOption' ignored}} 104 \ProcessOptions\relax

Loading subfiles

To handle subfiles in separate directories, we use the import package. If it has already been loaded, e.g. by the subfiles class, this line does nothing.

```
105 \RequirePackage{import}
```

The \subimport command requires path and filename as separate arguments, so we have to split qualified filenames into these two components. The internal LaTeX command \filename@parse almost fits the bill, except that it additionally splits the filename into basename and extension. Unfortunately, concatenating basename and extension to recover the filename is not clean: Under Unix/Linux, the filenames base and base. denote different entities, but after \filename@parse both have the same basename and an empty extension. Therefore we redefine the command \filename@simple temporarily; it is responsible for this unwanted split.

```
106 \def\subfiles@split#1{%
107 \let\subfiles@filename@simple\filename@simple
108 \def\filename@simple##1.\\{\edef\filename@base{##1}}%
109 \filename@parse{#1}%
110 \let\filename@simple\subfiles@filename@simple
111 }%
```

E.g., after executing \subfiles@split{../dir1/dir2/file.tex} the macros \filename@area and \filename@base expand to ../dir1/dir2/ and file.tex, respectively.

\subfile The command \subfile specifies the command \subimport for \inputing the

subfile, and then calls \subfiles@subfile.

```
112 \newcommand\subfile{%
113 \let\subfiles@loadfile\subimport
114 \subfiles@subfile
115 }
```

\subfileinclude

The command \subfileinclude specifies the command \subincludefrom for \includeing the subfile, and then calls \subfiles@subfile.

```
116 \newcommand\subfileinclude{%
117 \let\subfiles@loadfile\subincludefrom
118 \subfiles@subfile
119 }
```

The main functionality is implemented in \subfiles@subfile. It sets up the handling of the sub-preamble, splits the filename and loads the subfile.

```
120 \def\subfiles@subfile#1{%
121  \begingroup
122  \subfiles@handleSubDocument
123  \subfiles@split{#1}%
124  \subfiles@loadfile{\filename@area}{\filename@base}%
125  \endgroup
126 }
```

Fixing incompatibilities

\subfix

If some package provides a command that takes a filename as argument, then it has to be prefixed with the current \import@path. This is what the \subfix command tries to do. In order to succeed, the filename has to be expanded immediately, such that the current value of \import@path is used.

```
127 \def\subfix#1{\import@path#1}
```

For patching a list of file or path names, we define two auxiliary macros, one iterating over a comma-separated list of names and one processing a sequence of names enclosed in braces.

```
128 \def\subfiles@fixfilelist#1{%
     \def\subfiles@list{}%
129
130
     \def\subfiles@sep{}%
     \ensuremath{\texttt{Qfor}\subfiles@tmp:=\#1\do{\%}}
131
       \edef\subfiles@list\subfiles@sep\subfix{\subfiles@tmp}}%
132
       \def\subfiles@sep{,}%
133
134
     }%
135 }
136 \def\subfiles@fixpathlist#1{%
     \def\subfiles@list{}%
137
     \@tfor\subfiles@tmp:=#1\do{%
138
       \edef\subfiles@list{\subfiles@list{\subfix\subfiles@tmp}}%
139
     }%
140
141 }
```

\bibliography \graphicspath

We patch \bibliography and \graphicspath (from the graphics/graphicx package) such that users don't have to worry about adding \subfix.

```
142 \let\subfiles@bibliography\bibliography
143 \def\bibliography#1{%
     \subfiles@fixfilelist{#1}%
144
     \expandafter\subfiles@bibliography\expandafter{\subfiles@list}%
145
146 }
147 \@ifpackageloaded{graphics}{%
148
     \let\subfiles@graphicspath\graphicspath
149
     \def\graphicspath#1{%
       \subfiles@fixpathlist{#1}%
150
       \edef\subfiles@list{{\subfix{}}\subfiles@list}%
151
       \expandafter\subfiles@graphicspath\expandafter{\subfiles@list}%
152
    }%
153
154 }{}
```

\includestandalone

The command \includestandalone handles subfiles in its own way. Therefore we modify it to use the original definition of \end.

```
155 \@ifpackageloaded{standalone}{
     \RequirePackage{xpatch}
156
     \xpretocmd\includestandalone{%
157
       \subfiles@saveEndTo\subfiles@end@
158
       \ifcsname subfiles@end\endcsname
159
         \subfiles@restoreEndFrom\subfiles@end
160
161
     }{}{}
162
163
     \xapptocmd\includestandalone{\subfiles@restoreEndFrom\subfiles@end@}{}{}
```

Do we typeset the main file or a subfile?

\ifSubfilesClassLoaded

To add code or text conditionally, depending on whether the main document or a subfile is typeset, we provide the command \ifSubfilesClassLoaded.

```
165 \newcommand\ifSubfilesClassLoaded{%
166 \expandafter\ifx\csname ver@subfiles.cls\endcsname\relax
167 \expandafter\@secondoftwo
168 \else
169 \expandafter\@firstoftwo
170 \fi
171 }
```

The end is near

The subfiles package is loaded near the end of the main preamble. If it is loaded from a subfile, i.e., if subfiles.cls has been loaded, then we prepare for skipping the main document.

```
172 \ifSubfilesClassLoaded{%
173 \subfiles@handleMainDocument
174 }{}
```