autonum — automatic number referenced equations*

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1 Introduction

With LaTeX, the user has to decide manually to not number an equation by adding a star in the math environment. Authors who do not want to think about the numbering during the writing (and maybe they should not), often use the environments without stars. As default, these users get all equations numbered, although there are different opinions about what should be numbered.

The other automatic possibility one can think of is to number only the referenced equations. The mathtools package's option showonlyrefs seems to be the solution for those who want to have the referenced equations numbered only. Unfortunately for amsmath users this also means a step backwards, as the numbering can overwrite parts of the equation according to its documentation. Generally, this options seems to be quite unreliable as it is incompatible with the cleveref package. The autonum package implements the numbering of referenced equations only without this deficiencies.

2 Usage and Examples

To get the automatic numbering of referenced equations, simply load the package:

\usepackage{autonum}

The recommended style is to add a label to each logical equation. Then, simply use the references as needed. Never use the starred forms when defining an equation as they do not make sense with autonum and are deactivated. You can use the (redefined) equation or \[-\]-environment in most cases, if you add the appropriate \begin{split}-\end{split} pairs when needed. Sometimes, an align, multline, gather, flalign or alignat environment is needed.

Please keep in mind, that using autonum might not always be a good thing. If you hand-in a paper for review with many equations on a page, you might avoid

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using autonum or if you do, you probably should reference most of your equations or activate line numbers.

equation The following examples show the results of the equation environment after loading the package. Now let's reference the third equation: 1.

```
1 = 1 (equation without label)
2 = 2 (equation with label, not referenced)
3 = 3 (equation with label, already referenced) (1)
4 = 4 (equation with label, referenced later) (2)
```

Now let's reference the fourth equation: 2. The first and the second equations do not get a number, as they are not referenced.

If you want to try an example yourself, you can take this one, where only the first equation gets a number:

To get the correct references up to three compilation runs are necessary when the autonum package is used (as always in TEX this cannot be guaranteed, so in rare cases even that is not enough). This is one additional run compared to the default referencing mode, as one run is needed to check if an equation is used. This is probably not avoidable, as the information which equation should have a number is simply not always available in the first run while layouting the equation. Thus, the equation's number can change in the second run. For the reference command, this information is only stable in the third run, as the equations influence each other.

\[et al. Instead of equation you may also use one of the following environments: align, gather, multline, flalign. As the commands \[and \] are useless when using autonum, they are redefined to be an alias of begin{equation} and end{equation}, respectively. Without adding labels or referencing added labels, the new \[-\]-environment behaves like the old one.

equation+ In the rare case, that an equation is very important and not references within the text, but some other person wants to reference to that equation, you can use \begin{equation+} and \end{equation+}. The equation is then numbered in all cases (having a label or not, being referenced or not). This feature has been added, so that all three referencing practices are supported in LATEX with as much automation as possible. The other math environments support a +-variant, too.

equation* The starred versions have been deleted, to avoid accidental use. Use the versions without star and without adding a label, to avoid that an equation gets a number.

3 Compatibility

3.1 Load Order

As other packages might break autonum, it should be loaded very late. Normally, amsmath is loaded automatically to make use of the more advanced math environments. Nevertheless, to use other packages, it might be necessary to load amsmath manually. To use autonum with amsmath, hyperref and cleveref for example, the order must be amsmath \rightarrow hyperref \rightarrow cleveref \rightarrow autonum, as cleveref may not be loaded after amsmath. If a wrong order has been active, it might be necessary to delete the aux file manually to get rid of compile errors. The support of autonum without amsmath has been discontinued due to missing demand.

3.2 Hyperref

The hyperref package must be loaded with the option hypertexnames=false to work when autonum is used.

Problem description: Generally, the autonum package is careful not to break other packages, but with autonum there are non-starred mathematical environment which do not increase the equation counter. This leads to the following warning in hyperref when more than one equation is used: "destination with the same identifier (nameequation.0.1) has been already used, duplicate ignored". Additionally, the link anchors do not work correctly (with a reference followed by a labeled equation, there is a warning in tracing mode, too. Hyperref seems to increase LATEX's equation's counter (called equation) only if a equation is referenced. This counter may not be modified to avoid problems with Hyperref, as this would change the displayed equation number (and it does not work anyway). This problem is independent of cleveref. The problem might be solvable by modifying \begin{equation} or \end{equation}. Using gather instead of equation removes the warning, but hyperlinks still do not work.

3.3 Reference commands

As default the \ref and cleveref's \cref commands are supported. Support for new reference commands can be added by executing \let\ref\NewReferenceCommand.

If the original \ref command should not be overwritten, you have the following choices. Please mind that these interfaces might change in the future. Please also mind the \makeatletter and \makeatother command before and after the commands, respectively.

tonum@generatePatchedReference

For normal reference commands expecting a single label name as an argument, you can use \autonum@generatePatchedReference{\NewReferenceCommand}.

num@generatePatchedReferenceCSL

For reference commands expecting a comma separated list of label names as an argument, you can use

\autonum@generatePatchedReferenceCSL{\NewReferenceCommand}.

generatePatchedReferenceGeneral

For reference commands expecting a general data structure containing label names as an argument, you can use

The macro \SplitAndLoopMacro acts as a function expecting the to-be-called function as the first argument and the data structure as the second argument. It must call the function given in the first argument for each label name given in the data structure of the second argument. An example is the \forcsvlist macro from the etoolbox package, which is used to implement \autonum@generatePatchedReferenceCSL.

4 Further Ideas

- A similar approach could be used for figure and table environments to print a warning, if such an environment is not referenced. With the subfig package, the solution would be harder, as a figure or table may be unreferenced, if all subfloats are referenced. Similarly, a subfloat may be unreferenced, if its parent environment is referenced. So the warning should only be printed if an unreferenced parent environment either does not have any child environment or if there is an unreferenced child environment.
- A warning could be printed, if another compile is necessary.
- A "*" could be used instead of a "+".
- If a reference is used before the label is defined, the reference information is saved in a variable and can be used later in the current run when processing the label. It does not have to be saved to the aux file. If a reference is used after defining the label, the reference information is saved in the aux file and can be used in the next run when processing the label. The information does not have to be saved into a variable, as a label must only be defined once and the definition has already happened. Unfortunately, this would make it necessary to distinguish between definitions in the current and in the last run, as otherwise this leads either to oscillation or to defining everything in the end (depending if csdefaux or csdefall is used in the not-defined case), which is probably not worth the effort.

- The command \(could be an alias for \egin{split} and \) could be an alias for \nd{split}
- This trick might be handy
- The \crefrange might be supported. As this would require a lot of work it will only be done if multiple people show interest and there are really convincing real-world examples where using \crefrange is superior to using \cref. Patches are, of course, welcome, too.

5 Contributions

- David Carlisle
 - explained that amsmath environments are executed twice what lead to the support of the amsmath environments
- Fg Nu
 - highlighted, that special characters in label names must be supported what lead to the support of special characters
- Joseph Wright
 - created a correctly working \csxdefaux what lead to the support of special characters
- Jonas Nyrup
 - reported a bug occurring when using \cref with comma separated arguments what lead to its fix
 - started an interesting discussion if cleveref's \crefrange command should be supported in autonum or not
- Toby Cubitt
 - highlighted, that there are some users who might find valid use of cleveref's \crefrange command

6 Implementation

The basic idea is to write into the aux file and save a variable whenever a label is referenced, so that the information is available in the current and in the next run. The label information is passed from the label command to the newline command. The newline command uses the label and the reference information to possibly add a \notag command, deciding if it is referenced or not.

\csxdefaux

This command is similar to the \csxdef command from the package etoolbox, but instead of defining the command immediately, it is defined in the next run by writing it to the aux file. The name is given by the first argument (which may not have a leading backslash). The second argument is the replacement text. This command would be a candidate for inclusion into etoolbox. \ifcsdef can be used to check, if the command has been defined. See also http://tex.stackexchange.com/a/49035 Usage: \csxdefaux{csname}{replacement}

1 \def\csxdefaux#1#2{%

The expandafter commands are used to first expand the \csname-\endcsname. Then there is a command definition left, where the command and its replacement (which can also be a command) are protected by \string to create the command in the next run (when the aux file is read) and not in the current run (when the aux file is written).

```
2 \protected@write\@mainaux{}{%
3 \csxdef{\detokenize{#1}}{#2}%
4 }%
5 }
```

This command simply combines the commands \csxdef and \csxdefaux. This command would be a candidate for inclusion into etoolbox.

```
6 \def\csxdefall#1#2{%
7 \csxdefaux{#1}{#2}%
8 \csxdef{#1}{#2}%
9 }
```

\ifcsedef This command is similar to the \ifcsdef test from the package etoolbox, but the command sequence gets fully expanded before it is evaluated.. This command would be a candidate for inclusion into etoolbox.

```
10 \def\ifcsedef#1#2#3{%
11 \edef\autonum@ifcsedefTemp{#1}%
12 \expandafter\ifcsdef\expandafter{\autonum@ifcsedefTemp}{#2}{#3}%
13 \undef{\autonum@ifcsedefTemp}%
14 }
```

This is needed to not get overwritten by other packages. The package autonum only overwrites some commands whose name start with \autonum. Other commands are only patched, so the currently valid command gets called, too. So although not very polite, this behavior seems reasonable.

15 \AtBeginDocument{%

Most of amsmath's environments are redefined. The environments aligned and gathered are not redefined, as it is unclear, how the numbering should work.

```
17 %^^A \ifdef{\multlined}{%
18 %^^A \autonum@patchBlockEnvironment{multlined}%
19 %^^A }{}%
```

If align is redefined before flalign or alignat, autonum.dtx does not build anymore. The error reason is unknown. As the error disappears when align is redefined after both, there is no motivation in finding the underlying problem.

- 20 \forcsvlist{\autonum@patchParametrizedFullEnvironment}{alignat}%
- 21 \forcsvlist{\autonum@patchFullEnvironment}{equation,gather,multline,flalign,align}% Patch the environment delimited by $\[$ and $\]$.
- 22 % \autonum@patchShortcutEnvironment
- 23 \def\[#1\]{%
- 24 \begin{equation}#1\end{equation}%

Support the normal \ref command and, if available, the \cref command from cleveref.

```
26 \autonum@generatePatchedReference{ref}%
27 \ifdef{\cref}{%
```

- 28 \autonum@generatePatchedReferenceCSL{cref}%
- 29 }{}%
- 30 }

\autonum@patchEnvironment

Patch a mathematical environment to automatically show an equation's number, if a part is referenced and do not use a number otherwise. For completeness, the original definition (numbering every part of an displayed equation structure) is made available using a different name. Do not redefine environment before getting the original label and newline commands. Use center as the default parameter, as a center environment is a neutral element regarding the subcommands' definitions.

```
32 \def\autonum@patchFullEnvironment#1{%
33 \autonum@saveEnvironmentSubcommands{#1}{center}{}%
35 }
36 \def\autonum@patchParametrizedFullEnvironment#1{%
37 \autonum@saveEnvironmentSubcommands{#1}{center}{1}%
38 \autonum@patchEnvironmentHelper{#1}{1}%
40 \def\autonum@patchBlockEnvironment#1{%
41 \autonum@saveEnvironmentSubcommands{#1}{equation*}{}%
42 \autonum@patchEnvironmentHelper{#1}{0}%
```

44 \def\autonum@patchEnvironmentHelper#1#2{%

45 \autonum@renameEnvironment{#1}{#2}%

31 % \def\autonum@patchEnvironment#1{

46 \autonum@changeEnvironment{#1}{#2}%

47 \autonum@generatePatchedLabel{#1}%

48 \autonum@generatePatchedNewline{#1}%

onum@saveEnvironmentSubcommands

This code is to save the newline code used in a mathematic display environment so that it can be used later. This is necessary, as saving it in the instance of the environment, where it should be used, does not work. Allow for two arguments, to enable putting the alignment building blocks into an equation environment (see amsmath documentation). The third argument is needed for environments which have arguments themself.

```
50 \def\autonum@saveEnvironmentSubcommands#1#2#3{% 51 \begin{textblock}{1}[1,1](0,0)% 52 \begin{#2}% 53 \begin{#1}#3%
```

Using global here is necessary to get the information out of the environment.

54 \global\cslet{autonum@newline#1}\\%

Use \notag to not increase the equation counter (otherwise the first equation shown would not have number 1).

55 \notag%

For multline, check, that autonum's label command is undefined, because this means, that the first pass (measuring pass) of the environment is active. This is to avoid getting the \label command of the second pass (displaying pass), where the \label command is set to the null definition. The multline environment seems to need the first pass, whereas other environments seem to need the second pass, so adapt to the environments.

```
56 \left( \frac{41}{\mu}\right)  or test {\ifcsundef{autonum@label#1}}{% 57 \left( \frac{4\mu}{\mu}\right)
```

Use \notag again, to avoid an error with the gathered environment. WTF?

```
59 \notag%
60 \end{#1}%
61 \end{#2}%
62 \end{textblock}%
63 }
```

\autonum@renameEnvironment

Rename the old environment to be accessible with an appended + by saving the original environment using a different name. The first argument contains the environment's name, the second argument contains the number of arguments the environment has.

```
64 \def\autonum@renameEnvironment#1#2{% 65 \csletcs{autonum@#10ld}{#1}% 66 \csletcs{autonum@end#10ld}{end#1}% 67 \newenvironment{#1+}[#2]{% 68 \csuse{autonum@#10ld}% 69 }{% 70 \csuse{autonum@end#10ld}% 71 }% 72 }
```

\autonum@changeEnvironment

Now change the environment. This command only supports displayed equation structures and is not suited for other environments (as e.g. figures). The second argument contains the number of arguments the redefined environment has.

73 \def\autonum@changeEnvironment#1#2{%

Although Amsmath's environment is executed twice (for measuring and for painting), the content here is executed only once. The following if is only needed to distinguish between environments without (e.g. equation) and with one parameter (e.g. alignat).

```
74 \ifnum #2=0%
75 \renewenvironment{#1}{%
76 \autonum@startChangeEnvironment{#1}{}%
77 }{%
78 \autonum@endChangeEnvironment{#1}%
79 }
80 \else
81 \renewenvironment{#1}[1]{%
82 \autonum@startChangeEnvironment{#1}{##1}%
83 }{%
84 \autonum@endChangeEnvironment{#1}%
85 }%
86 \fi%
```

Delete the starred versions of the environment, as they sometimes lead to strange errors a long time after using the starred version. By deleting it, the error occurs at the right place.

```
87 \global\csundef{#1*}%
88 \global\csundef{end#1*}%
89 }
```

\autonum@startChangeEnvironment

Start the changed environment.

90 \def\autonum@startChangeEnvironment#1#2{%

Prepare the label and the newline commands and begin the displayed equation environment.

```
91 \autonum@saveSubcommands
92 \csuse{autonum@#101d}#2%
93 \autonum@patchSubcommands{#1}%
94 }
```

\autonum@endChangeEnvironment

Close the changed environment.

95 \def\autonum@endChangeEnvironment#1{%

Possibly hide the number of the last equation in the displayed equation environment, end the latter one and restore the subcommands.

```
96 \autonum@possiblyHideNumber
97 \csuse{autonum@end#10ld}%
98 \autonum@restoreSubcommands
99 }
```

\autonum@saveSubcommands

Save the current newline and label commands.

```
100 \def\autonum@saveSubcommands{% 101 \let\autonum@labelNormal\label% 102 \let\autonum@newlineNormal\\% 103 }
```

\autonum@patchSubcommands

Patch the label command, as some special data has to be saved with each usage. In order to support multi-line equations, the counter must be increased in every line, as every line is a possible reference target. Therefore,

has to be overwritten, too. This must be global, as amsmath is very annoying with overwriting local definitions, e.g. in align environments.

- 104 \def\autonum@patchSubcommands#1{%
- 105 \global\letcs{\label}{autonum@patched#1Label}%

Do not patch the newline command in a multline environment, as only the last line may get a \notag command, because all lines basically build one equation (see also amsmath's documentation, section 3.3).

```
106 \ifstrequal{#1}{multline}{%
107 }{%
108  \global\letcs{\\}{autonum@patched#1Newline}%
109 }%
110 }
```

\autonum@restoreSubcommands

Restore the newline and label commands. This must be global, as it had been overwritten globally in \autonum@patchSubcommands.

- 111 \def\autonum@restoreSubcommands{%
- 112 \global\let\label\autonum@labelNormal%
- 113 \global\let\\\autonum@newlineNormal%

114 }

\autonum@generatePatchedLabel

Use an extra command to patch the used label command for efficiency.

- 115 \def\autonum@generatePatchedLabel#1{%
- 116 \csdef{autonum@patched#1Label}##1{%

The labeling information is needed in the newline command. Therefore, the following variable is used to store it until the next newline command. As the definition is local and every line in an multi-line displayed math environment has its own group, the variable does not have to be deleted explicitly.

- 117 \ifdef{\autonum@currentLabel}{%
- 118 \PackageError{autonum}{Two succeeding \string\label's detected}{Did you forget a \string\\?}%
 119 }{%
- 120 \def\autonum@currentLabel{##1}%
- 121 }%

Only call the original label command if the label gets referenced. This obviously is identical if the reference is located before the label. It is also identical if the reference is located after the label, as the \\ or \endenvironment commands which follow the \label would suppress the numbering anyway in the first pass. In the second pass, the information about referencing is the same as if only the content of the following if-command were available.

122 \ifcsedef{autonum@##1Referenced}{%

The environment's original label command is called to do the real labeling. As it checks for erroneous succeeding labels using \f@label, this variable has to be emptied before every call.

```
123 \let\df@label\@empty%
                                 124 \csuse{autonum@label#1}{##1}%
                                 125 }{}
                                 126 }%
                                 127 }
                                 This command generates patched newline commands for displayed math environ-
autonum@generatePatchedNewline
                                 ments, so that they can simply be activated when needed.
                                 128 \def\autonum@generatePatchedNewline#1{%
                                 129 \csdef{autonum@patched#1Newline}{%
                                 130 \autonum@possiblyHideNumber
                                 131 \csuse{autonum@newline#1}%
                                  132 }
                                 133 }
                                 Define this command, which can hide the current line's number if the label is not
   \autonum@possiblyHideNumber
                                 referenced.
                                 134 \def\autonum@possiblyHideNumber{
                                 135 \ifdef{\autonum@currentLabel}{%
                                 136 \ifcsedef{autonum@\csuse{autonum@currentLabel}Referenced}{%
                                 137 }{%
                                 138 \notag%
                                 139 }
                                 The current label does not have to be cleaned, as every line is a separate cell
                                 defining a local group in an displayed math environment.
                                 140 }{%
                                 141 \notag%
                                 142 }%
                                 143 }
                                 This command can patch reference commands with a normal input argument.
tonum@generatePatchedReference
                                 144 \def\autonum@generatePatchedReference#1{%
                                 145 \autonum@generatePatchedReferenceGeneral{#1}{autonum@use}%
                                 146 }
num@generatePatchedReferenceCSL
                                 This command can patch reference commands which expect a comma separated
                                 list as input argument.
                                 147 \def\autonum@generatePatchedReferenceCSL#1{%
                                 148 \autonum@generatePatchedReferenceGeneral{#1}{forcsvlist}%
generatePatchedReferenceGeneral
                                 This command can patch arbitrary reference commands. The patch logic can be
                                 different to patching the label command, as the references have to be patched only
                                 once, so optimizing for speed is counter-productive.
                                 150 \def\autonum@generatePatchedReferenceGeneral#1#2{%
                                 151 \csletcs{autonum@reference#10ld}{#1}%
                                  152 \csdef{#1}##1{%
```

153 \csuse{#2}{\autonum@markLabelAsReferenced}{##1}

Call the old reference command.

```
154 \csuse{autonum@reference#10ld}{##1}% 155 }%
```

156 }

\autonum@markLabelAsReferenced

This is a simple helper macro to mark a label as referenced. The reference information is stored into a variable (for the current run) and into the aux file (for the next run), so it does not matter if the reference is used before or after the definition of the label. Saving into a variable saves one compilation run, although still up to three are needed to get everything right.

```
157 \def\autonum@markLabelAsReferenced#1{%
158 \csxdefall{autonum@#1Referenced}{}%
159 }
```

\autonum@use

This is a simple helper macro which can be used like a function handle similar to csuse but expecting a macro instead of a macro's name.

```
160 \def\autonum@use#1#2{%
161 #1{#2}%
162 }
```

ntonum@patchShortcutEnvironment

Use a counter to numerate all $\[-\]$ -environments linearly.

163 \newcounter{autonum@counter}

\[and \] are redefined as the correct one of equation and align. Due to the improved numbering, the old environment's capabilities are basically a subset of the new capabilities.

```
164 \ensuremath{\mbox{\sc loss}}\xspace 164
```

 $165 \left[\#1 \right] {\%}$

This command checks if the current environment only consists of one line without counting lines in sub-environments. The default will result in an align environment, as incorrectly using an equation instead of an correct align results in a compile error.

```
166 \ifcsedef{autonum@\Roman{autonum@counter}HasExactlyOneLine}{\%
```

167 \autonum@useWithMultipleLineDetection{equation}{##1}%

168 }{%

169 \autonum@useWithMultipleLineDetection{align}{##1}%

170 }%

171 \stepcounter{autonum@counter}%

172 }%

173 }

nm@useWithMultipleLineDetection

This function uses an environment defined by the first argument to display the content given in the second argument. A multiple-line detection is activated, to set a variable if more than one line is used.

```
174 \def\autonum@useWithMultipleLineDetection#1#2{%
```

175 \begin{#1}%

176 \autonum@patchParentheses

Use global as this is in the middle of the first local group of a math environment.

177 \global\let\autonum@patchedNewline\\%

Set the multipleLines variable if a newline is used. Do not use the newline for equations, as this results in "There's no line here to end" errors. This is ok, as if there is a newline in an environment, which is currently an equation, it is wrong anyway and should be set as an align environment. For that it is enough to set the multipleLines variable.

```
178 \ifstrequal{#1}{align}{%
179 \gdef\\{%
180 \autonum@patchedNewline
181 \gdef\autonum@multipleLines{}%
182 }%
183 }{%
184 \gdef\\{%
185 \gdef\autonum@multipleLines{}%
186 }%
187 }
```

Set the environment's content and reset the newline command.

188 #2%

189 \global\let\\\autonum@patchedNewline%

Store information if the current math environment. The roman number is used, as there might be no label and if there is one, it might not be available at the beginning of the environment. Delete the multipleLines variable, to avoid influencing the next $[-\]$ -environment, as the variable must be global.

```
190 \ifdef{\autonum@multipleLines}{%
191 \global\undef{\autonum@multipleLines}%
192 }{%
193 \csxdefaux{autonum@\Roman{autonum@counter}HasExactlyOneLine}{\Roman{autonum@counter}}%
194 }%
195 \autonum@restoreParentheses
196 \end{#1}%
197 }
```

\autonum@patchParentheses

This function patches the left and the right parentheses.

```
198 \global\def\autonum@patchParentheses{%
199 \autonum@patchParenthesis{()}{Left}{}%
200 \autonum@patchParenthesis{)}{Right}{end}%
201 }
```

\autonum@patchParenthesis

This function patches a parenthesis given in the first argument with a name partly given in the second argument by using the third argument.

```
202 \global\def\autonum@patchParenthesis#1#2#3{% 203 \ifcsdef{#1}{% 204 \global\csletcs{autonum@old#2Parenthesis}{#1}% 205 }{}% 206 \global\csletcs{#1}{#3split}% 207 }
```

\autonum@restoreParentheses

This function restores the left and the right parentheses.

```
208 \global\def\autonum@restoreParentheses{% 209 \autonum@restoreParenthesis{()}{Left}% 210 \autonum@restoreParenthesis{)}{Right}% 211 }
```

\autonum@restoreParenthesis

This function restores a parenthesis given in the first argument with the name given in the second argument.

```
212 \global\def\autonum@restoreParenthesis#1#2{%
213 \ifcsdef{autonum@old#2Parenthesis}{%
214 \global\csletcs{#1}{autonum@old#2Parenthesis}%
215 \global\csundef{autonum@old#2Parenthesis}%
216 }{}%
217 }
```