

The hypbmsec package

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Abstract

This package expands the syntax of the sectioning commands. If the argument of the sectioning commands isn't usable as outline entry, a replacement for the bookmarks can be given.

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*Please report any issues at <https://github.com/ho-tex/oberdiek/issues>

1 Usage

1.1 Bookmarks restrictions

Outline entries (bookmarks) are written to a file and have to obey the pdf specification. Therefore they have several restrictions:

- Bookmarks have to be encoded in PDFDocEncoding¹.
- They should only expand to letters and spaces.
- The result of expansion have to be a valid pdf string.
- Stomach commands like `\relax`, box commands, math, assignments, or definitions aren't allowed.
- Short entries are recommended, which allow a clear view.

1.2 `\texorpdfstring`

The generic way in package `hyperref` is the use of `\texorpdfstring`²:

```
\section{Pythagoras:
\texorpdfstring{$a^2+b^2=c^2}{%
  a\texttt{two}superior\ + b\texttt{two}superior\ =
  c\texttt{two}superior}%
}
```

1.3 Sectioning commands

The package `hyperref` automatically generates bookmarks from the sectioning commands, unless it is suppressed by an option. Commands that structure the text are here called “sectioning commands”:

```
\part, \chapter,
\section, \subsection, \subsubsection,
\paragraph, \subparagraph
```

1.4 Places for sectioning strings

The argument(s) of these commands are used on several places:

- text** The current text without restrictions.
- toc** The headlines and the table of contents with the restrictions of “moving arguments”.
- out** The outlines with many restrictions: The outline have to expand to a valid pdf string with PDFDocEncoding (see 1.1).

1.5 Solution with optional arguments

If the user wants to use a footnote within a sectioning command, the \LaTeX solution is an optional argument:

```
\section[Title]{Title\footnote{Footnote text}}
```

Now `Title` without the footnote is used in the headlines and the table of contents. Also `hyperref` uses it for the bookmarks.

This package `hypbmsec.drv` offers two possibilities to specify a separate outline entry:

¹`hyperref` doesn't support Unicode.

²In versions of `hyperref` below 6.54 see `\ifbookmark`.

- An additional second optional argument in square brackets.
- An additional optional argument in parentheses (in association with a pdf string that is internally surrounded by parentheses, too).

Because `hypbmsec.drv` stores the original meaning of the sectioning commands and uses them again, there should be no problems with packages that redefine the sectioning commands, if these packages doesn't change the syntax.

1.6 Syntax

The following examples show the syntax of the sectioning commands. For the places the strings appear the abbreviations are used, that are introduced in [1.4](#).

1.6.1 Star form

The behaviour of the star form isn't changed. The string appears only in the current text:

```
\section*{text}
```

1.6.2 Without optional arguments

The normal case, the string in the mandatory argument is used for all places:

```
\section{text, toc, out}
```

1.6.3 One optional argument

Also the form with one optional parameter in square brackets isn't new; for the bookmarks the optional parameter is used:

```
\section[toc, out]{text}
```

1.6.4 Two optional arguments

The second optional parameter in square brackets is introduced by this package to specify an outline entry:

```
\section[toc][out]{text}
```

1.6.5 Optional argument in parentheses

Often the `toc` and the `text` string would be the same. With the method of the two optional arguments in square brackets (see [1.6.4](#)) this string must be given twice, if the user only wants to specify a different outline entry. Therefore this package offers another possibility: In association with the internal representation in the pdf file an outline entry can be given in parentheses. So the package can easily distinguish between the two forms of optional arguments and the order does not matter:

```
\section(out){toc, text}
\section[toc](out){text}
\section(out)[toc]{text}
```

1.7 Without hyperref

Package `hypbmsec.drv` uses `hyperref` for support of the bookmarks, but this package is not required. If `hyperref` isn't loaded, or is called with a driver that doesn't support bookmarks, package `hypbmsec.drv` shouldn't be removed, because this would lead to a wrong syntax of the sectioning commands. In any cases package `hypbmsec.drv` supports its syntax and ignores the outline entries, if there are no code for bookmarks. So it is possible to write texts, that are processed with several drivers to get different output formats.

1.8 Protecting parentheses

If the string itself contains parentheses, they have to be hidden from $\text{T}_{\text{E}}\text{X}$'s argument parsing mechanism. The argument should be surrounded by curly braces:

```
\section({\outlines(bookmarks)}){text, toc}
```

With version 6.54 of `hyperref` the other standard method works, too: The closing parenthesis is protected:

```
\section(outlines(bookmarks{})){text, toc}
```

2 Implementation

```
1 (*package)
```

Package identification.

```
2 \NeedsTeXFormat{LaTeX2e}
3 \ProvidesPackage{hypbmsec}%
4 [2016/05/16 v2.5 Bookmarks in sectioning commands (HO)]
```

Because of redefining the sectioning commands, it is dangerous to reload the package several times.

```
5 \ifundefined{hbs@do}{%
6   \PackageInfo{hypbmsec}{Package 'hypbmsec' is already loaded}%
7   \endinput
8 }
```

`\hbs@do` The redefined sectioning commands calls `\hbs@do`. It does

- handle the star case.
- resets the macros that store the entries for the outlines (`\hbs@bmstring`) and table of contents (`\hbs@tocstring`).
- store the sectioning command `#1` in `\hbs@seccmd` for later reuse.
- at last call `\hbs@checkarg` that scans and interprets the parameters of the redefined sectioning command.

```
9 \def\hbs@do#1{%
10   \ifstar{#1*}{%
11     \let\hbs@tocstring\relax
12     \let\hbs@bmstring\relax
13     \let\hbs@seccmd#1%
14     \hbs@checkarg
15   }%
16 }
```

`\hbs@checkarg` `\hbs@checkarg` determines the type of the next argument:

- An optional argument in square brackets can be an entry for the table of contents or the bookmarks. It will be read by `\hbs@getsquare`
- An optional argument in parentheses is an outline entry. This is worked off by `\hbs@getbookmark`.
- If there are no more optional arguments, `\hbs@process` reads the mandatory argument and calls the original sectioning commands.

```
17 \def\hbs@checkarg{%
18   \ifnextchar[\hbs@getsquare{%
19     \ifnextchar(\hbs@getbookmark\hbs@process
20   }%
21 }
```

`\hbs@getsquare` `\hbs@getsquare` reads an optional argument in square brackets and determines, if this is an entry for the table of contents or the bookmarks.

```

22 \long\def\hbs@getsquare[#1]{%
23   \ifx\hbs@tocstring\relax
24     \def\hbs@tocstring{#1}%
25   \else
26     \hbs@bmdef{#1}%
27   \fi
28   \hbs@checkarg
29 }
```

`\hbs@getbookmark` `\hbs@getbookmark` reads an outline entry in parentheses.

```

30 \def\hbs@getbookmark(#1){%
31   \hbs@bmdef{#1}%
32   \hbs@checkarg
33 }
```

`\hbs@bmdef` The command `\hbs@bmdef` save the bookmark entry in parameter `#1` in the macro `\hbs@bmstring` and catches the case, if the user has given several outline strings.

```

34 \def\hbs@bmdef#1{%
35   \ifx\hbs@bmstring\relax
36     \def\hbs@bmstring{#1}%
37   \else
38     \PackageError{hypbmsec}{%
39       Sectioning command with too many parameters%
40     }{%
41       You can only give one outline entry.%
42     }%
43   \fi
44 }
```

`\hbs@process` The parameter `#1` is the mandatory argument of the sectioning commands. `\hbs@process` calls the original sectioning command stored in `\hbs@seccmd` with arguments that depend of which optional argument are used previously.

```

45 \long\def\hbs@process#1{%
46   \ifx\hbs@tocstring\relax
47     \ifx\hbs@bmstring\relax
48       \hbs@seccmd{#1}%
49     \else
50       \begingroup
51         \def\x##1{\endgroup
52           \hbs@seccmd{\texorpdfstring{#1}{##1}}%
53         }%
54         \expandafter\x\expandafter{\hbs@bmstring}%
55       \fi
56     \else
57       \ifx\hbs@bmstring\relax
58         \expandafter\hbs@seccmd\expandafter[%
59           \expandafter{\hbs@tocstring}%
60         ]{#1}%
61       \else
62         \expandafter\expandafter\expandafter
63         \hbs@seccmd\expandafter\expandafter\expandafter[%
64           \expandafter\expandafter\expandafter
65           \texorpdfstring
66           \expandafter\expandafter\expandafter{%
67             \expandafter\hbs@tocstring\expandafter
68           }\expandafter[%
69             \hbs@bmstring
70           ]%
71         ]{#1}%

```

```

72 \fi
73 \fi
74 }

```

We have to check, whether package `hyperref` is loaded and have to provide a definition for `\texorpdfstring`. Because `hyperref` can be loaded after this package, we do the work later (`\AtBeginDocument`).

This code only checks versions of `hyperref` that define `\ifbookmark` (v6.4x until v6.53) or `\texorpdfstring` (v6.54 and above). Older versions aren't supported.

```

75 \AtBeginDocument{%
76   \@ifundefined{texorpdfstring}{%
77     \@ifundefined{ifbookmark}{%
78       \let\texorpdfstring\@firstoftwo
79       \@ifpackageloaded{hyperref}{%
80         \PackageInfo{hybmsec}{%
81           \ifx\hy@driver\@empty
82             Default driver %
83           \else
84             '\hy@driver' %
85           \fi
86           of hyperref not supported,\MessageBreak
87           bookmark parameters will be ignored%
88         }%
89       }{%
90         \PackageInfo{hybmsec}{%
91           Package hyperref not loaded,\MessageBreak
92           bookmark parameters will be ignored%
93         }%
94       }%
95     }%
96   }%
97   \newcommand\texorpdfstring[2]{\ifbookmark{#2}{#1}}%
98   \PackageWarningNoLine{hybmsec}{%
99     Old hyperref version found,\MessageBreak
100    update of hyperref recommended%
101  }%
102 }%
103 }-{}%

```

Other packages are allowed to redefine the sectioning commands, if they does not change the syntax. Therefore the redefinitions of this package should be done after the other packages.

```

104 \let\hbs@part      \part
105 \let\hbs@section   \section
106 \let\hbs@subsection \subsection
107 \let\hbs@subsubsection \subsubsection
108 \let\hbs@paragraph \paragraph
109 \let\hbs@subparagraph \subparagraph
110 \renewcommand\part      {\hbs@do\hbs@part}%
111 \renewcommand\section   {\hbs@do\hbs@section}%
112 \renewcommand\subsection {\hbs@do\hbs@subsection}%
113 \renewcommand\subsubsection{\hbs@do\hbs@subsubsection}%
114 \renewcommand\paragraph {\hbs@do\hbs@paragraph}%
115 \renewcommand\subparagraph {\hbs@do\hbs@subparagraph}%
116 \begingroup\expandafter\expandafter\expandafter\endgroup
117 \expandafter\ifx\csname chapter\endcsname\relax\else
118   \let\hbs@chapter \chapter
119   \renewcommand\chapter {\hbs@do\hbs@chapter}%
120 \fi
121 }
122 </package>

```

3 Installation

3.1 Download

Package. This package is available on CTAN³:

[CTAN:macros/latex/contrib/oberdiek/hypbmsec.dtx](#) The source file.

[CTAN:macros/latex/contrib/oberdiek/hypbmsec.pdf](#) Documentation.

Bundle. All the packages of the bundle ‘oberdiek’ are also available in a TDS compliant ZIP archive. There the packages are already unpacked and the documentation files are generated. The files and directories obey the TDS standard.

[CTAN:install/macros/latex/contrib/oberdiek.tds.zip](#)

TDS refers to the standard “A Directory Structure for T_EX Files” ([CTAN:tds/tds.pdf](#)). Directories with `texmf` in their name are usually organized this way.

3.2 Bundle installation

Unpacking. Unpack the `oberdiek.tds.zip` in the TDS tree (also known as `texmf` tree) of your choice. Example (linux):

```
unzip oberdiek.tds.zip -d ~/texmf
```

Script installation. Check the directory `TDS:scripts/oberdiek/` for scripts that need further installation steps. Package `attachfile2` comes with the Perl script `pdfatfi.pl` that should be installed in such a way that it can be called as `pdfatfi`. Example (linux):

```
chmod +x scripts/oberdiek/pdfatfi.pl
cp scripts/oberdiek/pdfatfi.pl /usr/local/bin/
```

3.3 Package installation

Unpacking. The `.dtx` file is a self-extracting `docstrip` archive. The files are extracted by running the `.dtx` through plain T_EX:

```
tex hypbmsec.dtx
```

TDS. Now the different files must be moved into the different directories in your installation TDS tree (also known as `texmf` tree):

```
hypbmsec.sty → tex/latex/oberdiek/hypbmsec.sty
hypbmsec.pdf → doc/latex/oberdiek/hypbmsec.pdf
hypbmsec.dtx → source/latex/oberdiek/hypbmsec.dtx
```

If you have a `docstrip.cfg` that configures and enables `docstrip`’s TDS installing feature, then some files can already be in the right place, see the documentation of `docstrip`.

3.4 Refresh file name databases

If your T_EX distribution (teT_EX, miK_TE_X, ...) relies on file name databases, you must refresh these. For example, teT_EX users run `texhash` or `mktextlsr`.

³<http://ctan.org/pkg/hypbmsec>

3.5 Some details for the interested

Unpacking with L^AT_EX. The .dtx chooses its action depending on the format:

plain T_EX: Run docstrip and extract the files.

L^AT_EX: Generate the documentation.

If you insist on using L^AT_EX for docstrip (really, docstrip does not need L^AT_EX), then inform the autodetect routine about your intention:

```
latex \let\install=y\input{hypbmsec.dtx}
```

Do not forget to quote the argument according to the demands of your shell.

Generating the documentation. You can use both the .dtx or the .drv to generate the documentation. The process can be configured by the configuration file ltxdoc.cfg. For instance, put this line into this file, if you want to have A4 as paper format:

```
\PassOptionsToClass{a4paper}{article}
```

An example follows how to generate the documentation with pdfL^AT_EX:

```
pdflatex hypbmsec.dtx
makeindex -s gind.ist hypbmsec.idx
pdflatex hypbmsec.dtx
makeindex -s gind.ist hypbmsec.idx
pdflatex hypbmsec.dtx
```

4 Catalogue

The following XML file can be used as source for the [T_EX Catalogue](#). The elements `caption` and `description` are imported from the original XML file from the Catalogue. The name of the XML file in the Catalogue is `hypbmsec.xml`.

```
123 (*catalogue)
124 <?xml version='1.0' encoding='us-ascii'?>
125 <!DOCTYPE entry SYSTEM 'catalogue.dtd'>
126 <entry datestamp='$Date$' modifier='$Author$' id='hypbmsec'>
127   <name>hypbmsec</name>
128   <caption>Hypertext bookmarks in sectioning commands.</caption>
129   <authorref id='auth:oberdiek'>
130     <copyright owner='Heiko Oberdiek' year='1998-2000,2006,2007'>
131       <license type='lppl1.3'>
132         <version number='2.5'>
133           <description>
134             Bookmark entries can be given as another argument to the LaTeX
135             sectioning commands. The <xref refid='hyperref'>hyperref</xref>
136             package is required to get the bookmarks, but the syntax
137             works without it.
138           <p/>
139           This package is part of the <xref refid='oberdiek'>oberdiek</xref>
140           bundle.
141         </description>
142         <documentation details='Package documentation'
143           href='ctan:/macros/latex/contrib/oberdiek/hypbmsec.pdf'>
144           <ctan file='true' path='/macros/latex/contrib/oberdiek/hypbmsec.dtx'>
145             <miktex location='oberdiek'>
146               <texlive location='oberdiek'>
147                 <install path='/macros/latex/contrib/oberdiek/oberdiek.tds.zip'>
148               </entry>
149             </catalogue>
```


5 History

[1998/11/20 v1.0]

- First version.
- It merges package `hysecopt` and
- package `hybmpar`.
- Published for the DANTE'99 meeting⁴.

[1999/04/12 v2.0]

- Adaptation to `hyperref` version 6.54.
- Documentation in dtx format.
- Copyright: LPPL ([CTAN:macros/latex/base/lppl.txt](#))
- First CTAN release.

[2000/03/22 v2.1]

- Bug fix in redefinition of `\chapter`.
- Copyright: LPPL 1.2

[2006/02/20 v2.2]

- Code is not changed.
- New DTX framework.
- LPPL 1.3

[2007/03/05 v2.3]

- Bug fix: Expand `\hbs@tocstring` and `\hbs@bmstring` before calling `\hbs@seccmd`.

[2007/04/11 v2.4]

- Line ends sanitized.

[2016/05/16 v2.5]

- Documentation updates.

6 Index

Numbers written in *italic* refer to the page where the corresponding entry is described; numbers underlined refer to the code line of the definition; plain numbers refer to the code lines where the entry is used.

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⁴Url: <http://dante99.cs.uni-dortmund.de/handouts/oberdiek/hypbmsec.sty>

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