

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

Federico Garcia, Gernot Salzer

2020/02/14 v1.6

Abstract

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

Contents

1	Introduction	1
2	Basic usage	2
3	Advanced usage	3
3.1	Hierarchy of directories	3
3.2	Including files instead of inputting them	4
3.3	Bibliographies	4
3.4	Unusual locations for placing definitions and text	4
3.5	Avoiding extra spaces	5
4	Troubleshooting	6
5	Dependencies	6
6	Version history	6
7	The Implementation	7
7.1	The class	7
7.2	The package	9

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 L^AT_EX document and as part of the whole project, depending on whether it is L^AT_EXed 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` *at the end of the preamble*:

```
\usepackage{subfiles}
\begin{document}
```

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

```
\subfile{<subfile_name>}
```

`subfiles.cls` The subfiles have to start with the line

```
\documentclass[<main_file_name>]{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 `\`). Thus, we have the following structure:

main file	subfile
<hr/>	<hr/>
<code>\documentclass[...]{...}</code>	<code>\documentclass[<main_file_name>]{subfiles}</code>
<code><shared preamble></code>	<code>\begin{document}</code>
<code>\usepackage{subfiles}</code>	<code>...</code>
<code>\begin{document}</code>	<code>\end{document}</code>
<code>...</code>	<hr/>
<code>\subfile{<subfile_name>}</code>	
<code>...</code>	
<code>\end{document}</code>	
<hr/>	

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 three lines `\documentclass[...]{subfiles}`, `\begin{document}`, and `\end{document}` are ignored.

3 Advanced usage

3.1 Hierarchy of directories

Sometimes it is desirable to put a subfile together with its images and further files into its own directory. The difficulty now is that these additional files have to be addressed by different paths depending on whether the main files 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.tex	subfile1.tex
<code>\documentclass{article}</code>	<code>\documentclass[../main]{subfiles}</code>
<code>\input{mypreamble}</code>	<code>\begin{document}</code>
<code>\usepackage{graphicx}</code>	<code>\input{text1}</code>
<code>\usepackage{subfiles}</code>	<code>\includegraphics{image1.jpg}</code>
<code>\begin{document}</code>	<code>\subfile{dir2/subfile2}</code>
<code>\subfile{dir1/subfile1}</code>	<code>\end{document}</code>
<code>\end{document}</code>	

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

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

3.2 Including files instead of inputting them

`\subfileinclude` In plain L^AT_EX, 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

`\subfileinclude{<subfile_name>}`

3.3 Bibliographies

Manual bibliographies with the `thebibliography` environment work as usual. Problems may arise if external programs like `bibtex` or `biber` are used to generate the bibliography. Here are some hints on how to make it work.

- | | |
|----------------------------|--|
| <code>\bibliography</code> | <ul style="list-style-type: none"> • Make sure the command <code>\bibliography</code> is executed after loading the <code>subfiles</code> package. Put the command between <code>\usepackage{subfiles}</code> and <code>\begin{document}</code> or somewhere into the text part. • When you use the package <code>biblatex</code>, and programs like <code>biber</code> complain about not being able to find the bibliography files, use <code>\bibliography</code> instead of <code>\addbibresource</code> (see above), or the command <code>\subfix</code> (see below). |
| <code>\subfix</code> | <ul style="list-style-type: none"> • Whenever an external program complains that a file specified in the L^AT_EX document cannot be found, wrap the command <code>\subfix</code> around the filename. Here are some examples. |

package	command when used with <code>subfiles</code>
<code>biblatex</code>	<code>\addbibresource{\subfix{<file>}}</code>
<code>bibunits</code>	<code>\putbib[\subfix{<file1>},\subfix{<file2>},...]</code> <code>\defaultbibliography{\subfix{<file1>},...}</code>

The `subfiles` package has been tested with the packages `biblatex`, `bibunits`, and `chapterbib` as well as with the external programs `bibtex` and `biber`.

3.4 Unusual locations for placing definitions and text

Usually all definitions and packages required by the `subfiles` should go into the preamble of the main file. There are some further locations, though, where one might consider adding definitions and text. Put negatively, apparently irrelevant stuff in these locations may become unexpectedly visible in the document or cause errors.

Code after the end of the main document is added to the preamble of the subfiles, but is ignored when typesetting the main file. This happens because a subfile typeset by itself does not really take the preamble of the main file, but *everything outside* of `\begin{document}` and `\end{document}`. This has two consequences: *a)* the user can add some commands that are to be processed as part of the preamble only when the subfiles are typeset by themselves; but also *b)* the user has to be careful even *after* `\end{document}` in the main file, for any syntax error there will ruin the L^AT_EXing of the subfile(s).

Similarly, when typesetting the main document, the `\subfile` command does not really load the stuff within the `document` environment, but *everything except* the three commands `\documentclass[...]{...}`, `\begin{document}`, and `\end{document}`. This has the following consequences.

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 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 within may not work outside.

Code after `\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.

3.5 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}`. Moreover, any stuff after `\end{document}` will end up in the main document, including spurious empty lines, which may lead to a new paragraph. Therefore, to load the contents of a subfile without intervening spaces, you have either to add comment signs:

main.tex	sub.tex
...	<code>\documentclass[main.tex]{subfiles}</code>
text before%	<code>\begin{document}</code>
<code>\subfile{sub.tex}%</code>	contents of subfile%
text after	<code>\end{document}</code>
	<code>% No empty lines after \end{document}!</code>

or to put everything on the same line:

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

4 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}` comes last in the preamble of the main document.
3. If some external program that cooperates with T_EX, like `bibtex` or `biber`, complains about not being able to find a file, locate the name of the file in the L^AT_EX source and replace $\langle filename \rangle$ by `\subfix{\langle filename \rangle}`.
4. Make sure that there is no stuff after `\end{document}`, neither in the main file nor in the subfiles.
5. If there is anything in the preambles of the subfiles, make sure that it is admissible for both, the preamble and the document area.
6. If nothing of the above helps and you are stuck, ask the people on [tex.stackexchange](https://tex.stackexchange.com/)³.

5 Dependencies

The `subfiles` package requires the `verbatim` package, whose `comment` environment is used to ignore the text area of the main file when typesetting subfiles separately. Moreover, the `import` package is needed to load subfiles and their auxiliary files from different directories. Both packages are part of the standard T_EX distributions.

6 Version history

v1.1: Initial version by Federico Garcia. Further versions by Gernot Salzer.

v1.2:

- Incompatibility with classes and packages removed that modify the `\document` command, like the class `revtex4`.

v1.3:

¹<https://ctan.org/pkg/subfiles>

²<https://github.com/gsalzer/subfiles>

³<https://tex.stackexchange.com/>

- 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 Domengoud 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.

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.

7 The Implementation

7.1 The class

```

1 < *class >
2 \NeedsTeXFormat{LaTeX2e}
3 \ProvidesClass{subfiles}[2020/02/14 v1.6 Multi-file projects (class)]
4 \DeclareOption*{\typeout{Preamble taken from file ‘\CurrentOption’}}%
5   \let\preamble@file\CurrentOption}
6 \ProcessOptions

```

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

```
7 \let\@classoptionslist\relax
```

Then we save the regular definition of `\documentclass` to be able to reset it later to this definition:

```
8 \let\subfiles@documentclass\documentclass
```

Now `\documentclass` is set equal to `\LoadClass` such that the class and the options of the main file will be loaded as usual.

```
9 \let\documentclass\LoadClass\relax
```

When typesetting a subfile, we have to skip the `document` environment of the main file. This is done with the commands `\comment` and `\endcomment` from the `verbatim` package. Now there is a problem: If we load `verbatim` here, the definition of the commands may be overwritten if the user loads e.g. the `comment` package. Loading `verbatim` in `subfiles.sty` at the latest possible moment is not reliable, either. On the one hand we may overwrite macros required later by the user, on the other hand the `memoir` class contains a copy of `verbatim`, so a later `\RequirePackage` refuses to reload the package. Thus, in the case of a document loading the `memoir` class and the `comment` package, we end up with the wrong definition of `\comment` in any case.

Therefore we load the `verbatim` package here and save the contents of the crucial commands `\comment` and `\endcomment` under a different name.

```
10 \RequirePackage{verbatim}
11 \let\subfiles@comment\comment
12 \let\subfiles@endcomment\endcomment
```

To handle subfiles in separate directories, we load the `import` package.

```
13 \RequirePackage{import}
```

The `\subimport` command requires path and filename as separate arguments, so we have to split file locations into these two components. The internal L^AT_EX command `\filename@parse` almost fits the bill, except that it additionally splits the filename into basename and extension. Unfortunately, concatenating base-name 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.

```
14 \def\subfiles@split#1{%
15   \let\subfiles@filename@simple\filename@simple
16   \def\filename@simple##1.\{\edef\filename@base{##1}}%
17   \filename@parse{#1}%
18   \let\filename@simple\subfiles@filename@simple
19 }
```

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.

Now we split the name of the main file that has been provided as optional argument of the document class, and `\subimport` the main file.

```
20 \subfiles@split{\preamble@file}
21 \subimport{\filename@area}{\filename@base}
```

The main file loads the package `subfiles` as part of the preamble, which saves the contents of `\document` and `\enddocument` as `\subfiles@document` and `\subfiles@enddocument`, respectively. We use these macros now to restore the

original values of `\document`, `\enddocument`, and `\documentclass`. The backup commands are `\undefined` to save memory. That's it.

```

22 {\catcode'\@=11
23 \global\let\document\subfiles@document
24 \global\let\enddocument\subfiles@enddocument
25 \global\let\documentclass\subfiles@documentclass
26 \global\let\subfiles@document\undefined
27 \global\let\subfiles@enddocument\undefined
28 \global\let\subfiles@documentclass\undefined
29 }
30 \</class>

```

It may not be obvious why `@` has to be catcoded to a letter, since we are in a style file anyway. However, the `\preamble@file` occasionally contains `\usepackage` commands that make `@` a non-letter. This is why the part after loading the main preamble needs a `\catcode` command, grouping, and `\global`'s.

7.2 The package

Any option will be ignored.

```

31 <*package>
32 \NeedsTeXFormat{LaTeX2e}
33 \ProvidesPackage{subfiles}[2020/02/14 v1.6 Multi-file projects (package)]
34 \DeclareOption*{\PackageWarning{\CurrentOption ignored}}
35 \ProcessOptions

```

If the initial document class was `subfiles`, then the main file is loaded as part of a subfile. In this case anything between `\begin{document}` and `\end{document}` has to be skipped, while the contents of the commands `\document` and `\enddocument` has to be retained for later use in the subfile. Therefore we save the contents of the two commands as `\subfiles@document` and `\subfiles@enddocument`, respectively. Now the `document` environment is redefined to become the saved `comment` environment from the `verbatim` package. Consequently, the body of the main file is ignored by \LaTeX , and only the preamble is read (as well as anything that comes after `\end{document}`!).

```

36 \@ifclassloaded{subfiles}{%
37   \let\subfiles@document\document
38   \let\subfiles@enddocument\enddocument
39   \let\document\subfiles@comment
40   \let\enddocument\subfiles@endcomment

```

By loading the `subfiles` package immediately before `\begin{document}` we ensure that `\subfiles@document` and `\subfiles@enddocument` contain all modifications that the class and the preamble of the main file may have applied to the `document` environment. This happens e.g. with the class `revtex4` and the package `pythontex`.

We use the `import` package to handle subfiles in separate directories. The `\subimport` command requires path and filename as separate arguments, so we have to split file locations 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. Both things, loading the package and defining the command, are also done in `subfiles.cls`, so we have to execute this code only if we are typesetting the main file.

```

41 }{% subfiles class not loaded, we typeset the main document
42 \RequirePackage{import}
43 \def\subfiles@split#1{%
44   \let\subfiles@filename@simple\filename@simple
45   \def\filename@simple##1.\{\edef\filename@base{##1}}%
46   \filename@parse{#1}%
47   \let\filename@simple\subfiles@filename@simple
48 }
49 }

```

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`.

```

50 \newcommand\subfile{%
51   \let\subfiles@loadfile\subimport
52   \subfiles@subfile
53 }

```

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

```

54 \newcommand\subfileinclude{%
55   \let\subfiles@loadfile\subincludefrom
56   \subfiles@subfile
57 }

```

The main functionality of the two `\subfile` commands is implemented in `\subfiles@subfile`. It redefines `\documentclass` and the `document` environment to do nothing but reverting these command to their original meaning and avoiding spurious spaces. Reverting `\documentclass` and `\document` to their original definition is important for being compatible with classes like `standalone` or packages like `bibentry`, which rely on this definition.

```

58 \newcommand\subfiles@subfile[1]{%
59   \begingroup
60   \let\subfiles@documentclass\documentclass
61   \let\subfiles@document\document
62   \let\subfiles@enddocument\enddocument
63   \renewcommand\documentclass[2][subfiles]{%
64     \let\documentclass\subfiles@documentclass
65     \ignorespaces

```

```

66 }%
67 \renewenvironment{document}{%
68   \let\document\subfiles@document
69   \ignorespaces
70 }{%
71   \let\enddocument\subfiles@enddocument
72   \@ignoretrue
73 }%

```

Now we split the file name into path and base name and load the file.

```

74 \subfiles@split{#1}%
75 \subfiles@loadfile{\filename@area}{\filename@base}%
76 \endgroup
77 }

```

To let external programs find files, we have to add the `\import@path` to file names. This is accomplished with the command `\subfiles@addimportpath`.

```

78 \def\subfiles@addimportpath#1{%
79   \def\subfiles@filelist{}%
80   \def\subfiles@sep{}%
81   \@for\subfiles@filename:=#1\do{%
82     \edef\subfiles@filelist{%
83       \subfiles@filelist
84       \subfiles@sep
85       \import@path
86       \subfiles@filename
87     }%
88   \def\subfiles@sep{,}%
89   }
90 }

```

`\bibliography` We redefine the `\bibliography` command such that the import path is added to the file names before the original command is called.

```

91 \let\subfiles@bibliography\bibliography
92 \renewcommand\bibliography[1]{%
93   \subfiles@addimportpath{#1}%
94   \expandafter\subfiles@bibliography\expandafter{\subfiles@filelist}%
95 }

```

`\subfix` Instead of adding further fixes for other packages that write filenames to external files (like `bibunits`), we provide a command for adding the `\import@path` to a filename.

```

96 \def\subfix#1{\import@path#1}

```