The \texttt{zref-clever} package$^*$

User manual

Gustavo Barros$^+$

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Abstract

\texttt{zref-clever} provides an user interface for making \LaTeX{} cross-references which automates some of their typical features, thus easing their input in the document and improving the consistency of typeset results. A reference made with \texttt{\zcref} includes a “name” according to its “type” and lists of multiple labels can be automatically sorted and compressed into ranges when due. The reference format is highly and easily customizable, both globally and locally. \texttt{zref-clever} is based on \texttt{zref}'s extensible referencing system.

\textbf{EXPERIMENTAL}

Please read Section 2 carefully.

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$^+$https://github.com/gusbrs/zref-clever
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1 Introduction

Cross-referencing is an area which lends itself quite naturally to automation. Not only for input convenience but also, and most importantly, for end results consistency. Indeed, the standard \LaTeX cross-referencing system – with \texttt{\textbackslash label}, \texttt{\textbackslash ref}, and \texttt{\textbackslash pageref} – is already a form of automation, by relieving us from checking the number of the referenced object, and the page where it lies.

But the plethora of existing features, packages and document classes which, in one way or another, extends this basic functionality is a clear indication of a demand for more automation. Just to name the most popular: \texttt{cleveref}, \texttt{hyperref}, \texttt{titleref}, \texttt{nameref}, \texttt{varioref}, \texttt{fancyref}, and the kernel’s \texttt{\textbackslash labelformat}.

However, the standard cross-referencing system stores two, and only two, properties with the label: the printed representation of the counter last incremented with \texttt{\textbackslash refstepcounter} and the page. Of course, out of the mentioned desire to automate more, the need arose to store more information about the label to support this: the title or caption of the referenced object; its counter or, even better, its “type”, that is, whether it is a section, chapter, figure, etc.; its hyperlink anchor, and so on. Thus those two property “fields” of the standard label became quite a disputed real state. And the packages in this area of functionality were bound to step on each other’s toes as a result.

Out of this conundrum, Heiko Oberdiek eventually developed \texttt{zref}, which implements an extensible referencing system, making the labels store a property list of flexible length, so that new properties can be easily added and queried. However, even when \texttt{zref} can rightfully boast this powerful basic concept and is really quite featureful, with several different modules available, it is fair to say that, for the average user, the package may appear to be somewhat raw. Indeed, for someone who “just wants to make a cross-reference”, the user interface of the \texttt{zref-user} module is akin to the standard \LaTeX cross-referencing system, and even requires some extra work if you want to have a hyperlinked reference. In other words, \texttt{zref} seems to have focused on infrastructure and on performing a number of specialized tasks with different modules, and a large part of the landscape of automation features available for the standard referencing system was not carried over to \texttt{zref}, neither by the \texttt{zref} itself nor by other packages.

\texttt{zref-clever} tries to cover this gap, by bringing a number of existing features available for the standard referencing system to \texttt{zref}. And the package’s name makes it clear that the core of the envisaged feature set is that of \texttt{cleveref}, even though the attempt was less one of replicating functionality per se than that of having it as a successful point of reference, from where we could then try to tap into \texttt{zref}’s potential. Indeed, although there is a significant intersection, the features of \texttt{zref-clever} are neither a superset nor a subset of those of \texttt{cleveref}. There are things either of them can do that the other can’t. There are also important differences in user interface design. In particular, \texttt{zref-clever} relies heavily on key=value interfaces both for general configuration and for centering in a single user command, \texttt{\textbackslash zcref}, as the main entrance for reference making, whose behavior can be modulated by local options.

Considering that \texttt{zref} itself offers the \texttt{zref-titelref} module, and that \texttt{zref-vario} offers integration of \texttt{zref-clever} with \texttt{varioref}, a significant part of the most prominent automation features available to the standard referencing system is thus brought to \texttt{zref}, working under a single consistent underlying infrastructure and user interface. Alas, there are some limitations (see Section 12), and it may be your cup of tea or not. Still, all in
all, hopefully \texttt{zref-clever} can make \texttt{zref} more accessible to the average user, and more interesting to users in general.

\section{Warning}

This package is in its early days, and should be considered experimental. By this I don’t mean I expect it to be “edgy”, indeed quite a lot of effort has been put into it so that this is not the case. However, during the initial development, I had to make a number of calls for which I felt I had insufficient information: in relation to features, packages, or classes I don’t use much, or to languages I don’t know well, user needs I found hard to anticipate etc. Hence, the package needs some time, and some use by more adventurous people, until it can settle down with more conviction. In the meantime, polishing the user interface and the infrastructure have a clear priority over backward compatibility. So, if you choose to use this package, you should be ready to accommodate to eventual upstream changes.

\section{\texttt{zref-clever} for the impatient}

\texttt{zref-clever} is based on \texttt{zref}'s referencing system which, though independent of the standard one, is very similar to it in its user interface. Indeed, to use \texttt{zref}, instead of setting a \texttt{\label} and making a \texttt{\ref}, one would set a \texttt{\zlabel} and make \texttt{\zrefs} to it, in pretty much the same way as for the standard system. \texttt{zref-clever} introduces the more featureful \texttt{\zcref} for making references, but relies on \texttt{zref}'s \texttt{\zlabel} for label setting.

A basic document using \texttt{zref-clever} is shown in How-to 1 which, despite the small necessary adjustments, should feel very familiar to any \LaTeX{} user acquainted with the standard referencing system:

\begin{verbatim}
\documentclass{article}
\usepackage{zref-clever}
\usepackage{hyperref}
\begin{document}
\section{Section 1}
\zlabel{sec:section-1}
\begin{figure}
A figure.
\caption{Figure 1}
\zlabel{fig:figure-1}
\end{figure}
\zcref{sec:section-1}
\zcref{fig:figure-1} shows some interesting information.

A page reference can be done with either \texttt{\zcpageref{sec:section-1}} or with \texttt{\zcref{page}{sec:section-1}}. A reference can also be made to multiple labels, as in \texttt{\zcref{sec:section-1, fig:figure-1}}.
\end{document}
\end{verbatim}
The references in the document of How-to 1 illustrate one of the main features of zref-clever, which is to include an appropriate “type name” of the reference, alongside of the reference itself. The document renders its references as:

A reference to section 1. Figure 1 shows some interesting information. A page reference can be done with either page 1 or with page 1. A reference can also be made to multiple labels, as in section 1 and figure 1.

How-to 1 also illustrates the use the optional argument of \zcref{} to modulate the behavior of the reference. In particular, the S option is one you should get acquainted with from the start, as it ensures that the type name of a reference is properly capitalized and not abbreviated, and it is meant to be used in references made at the beginning of a sentence.

But zref-clever is highly customizable, and several other options exist, and multiple places where you can set them:

- The optional argument of \zcref{}: for individual references.
- \zcsetup: for settings meant to affect all references.
- \zcRefTypeSetup: to customize the behavior of each reference type.
- \zcLanguageSetup: for language-specific settings.

For the list of available options, and for these different scopes in which they can be used, see Sections 6, 7, 9 and 10. Other usage examples are available at Section 11.

4 Loading the package

zref-clever can be loaded with the usual:

\usepackage{zref-clever}

The package does not accept load-time options, package options must be set using \zcsetup (see Section 6).

5 Dependencies

zref-clever requires zref, and \LaTeX{} kernel 2021-11-15, or newer. It also needs ifdraft. Some packages are leveraged by zref-clever if they are present, but are not loaded by default or required by it, namely: hyperref, zref-check, and zref’s zref-titleref, zref-hyperref, and zref.xr modules.

6 User interface

\zcref{} \zcref(*)[⟨options⟩][⟨labels⟩]
Typesets references to \texttt{{\langle labels\rangle}}, given as a comma separated list. When \texttt{hyperref} support is enabled, references will be hyperlinked to their respective anchors, according to options. The starred version of the command does the same as the plain one, just does not form links. The \texttt{{\langle options\rangle}} are (mostly) the same as those of the package, and can be given to local effect. The \texttt{{\langle labels\rangle}} argument is protected by \texttt{zref}'s \texttt{\zref@wrapper@babel}, so that it enjoys the same support for \texttt{babel}'s active characters as \texttt{zref} itself does.

\texttt{\zcpageref\langle*\rangle\langle\options\rangle\langle\labels\rangle}

Typesets page references to \texttt{{\langle labels\rangle}}, given as a comma separated list. It is equivalent to calling \texttt{\zcref} with the \texttt{ref=page} option: \texttt{\zcref\langle*\rangle\langle\options\rangle,ref=page\rangle\langle\labels\rangle}.

\texttt{\zcsetup\langle\options\rangle}

Sets \texttt{zref-clever}'s general options (see Sections 7 and 9). The settings performed by \texttt{\zcsetup} are local, within the current group. But, of course, it can also be used to global effects if ungrouped, e.g. in the preamble.

\texttt{\zcRefTypeSetup\langle\type\rangle\langle\options\rangle}

Sets type-specific reference format options (see Section 9). Just as for \texttt{\zcsetup}, the settings performed by \texttt{\zcRefTypeSetup} are local, within the current group.

Besides these, user facing commands related to Internationalization are presented in Section 10. Note still that all user commands are defined with \texttt{\NewDocumentCommand}, which translates into the usual handling of arguments by it and/or processing by \texttt{l3keys}, particularly with regard to brace-stripping and space-trimming.

Furthermore, \texttt{zref-clever} loads \texttt{zref}'s \texttt{zref-user} module by default. So you also have its user commands available out of the box, including \texttt{\zref} and \texttt{\zpageref}, but notably:

\texttt{\zlabel\langle\label\rangle}

Sets \texttt{{\langle label\rangle}} for referencing with \texttt{\zref} and, thus, also \texttt{\zcref}. \texttt{\zlabel} is provided by \texttt{zref-user} and is the counterpart of \texttt{\label} for \texttt{zref}'s referencing system.

7 \hspace{1em} Options

\texttt{zref-clever} is highly configurable, offering a lot of flexibility in typeset results of the references, but it also tries to keep these "handles" as convenient and user friendly as possible. To this end, most of what one can do with \texttt{zref-clever} (pretty much all of it), can be achieved directly through the standard and familiar "comma separated list of key=value options".

There are two main groups of options in \texttt{zref-clever}: "general options", which affect the overall behavior of the package, or the reference as a whole; and "reference format options", which control the detail of reference formatting, including type-specific and language-specific settings.
This section covers the first group (for the second one, see Section 9). General options can be set globally by means of \zcsetup in the preamble (see Section 6). They can also be set locally with \zcsetup along the document or through the optional argument of \zcref (see Section 6). Most general options can be used in any of these contexts, but that is not necessarily true for all cases, some restrictions may apply, as described in each option’s documentation.

The ref option controls the label property to which \zcref refers to. It can receive \zref properties, as long as they are declared, but notably default, page, thecounter and, if \zref-title-ref is loaded, title. The package’s default is, well, default, which is our standard reference. thecounter is a property set by \zref-clever and is similar to \zref’s default property, except that it is not affected by the kernel’s \labelformat.\footnote{Technical note: the default property stores \@currentlabel, while the thecounter property stores \the\@currentcounter. The later is exactly what \refstepcounter uses to build \@currentLabel, except for the \labelformat prefix and, hence, has the advantage of being unaffected by it. But the former is more reliable since \@currentLabel is expected to be correct pretty much anywhere whereas, although \refstepcounter does set \@currentCounter, it is not everywhere that uses \refstepcounter for the purpose. In the cases where the references from these two do diverge, \zref-clever will likely misbehave (reference type, sorting and compression inevitably depend on a correct \currentcounter), but using default at least ensures that the reference itself is correct. That said, if you do set \labelformat for some reason, thecounter may be useful.} By default, reference formatting, sorting, and compression are done according to information inferred from the current counter (see \currentcounter option below). Special treatment in these areas is provided for page, but not for any other properties. The page option is a convenience alias for ref=page.

When \zcref typesets a set of references, each group of references of the same type can be, and by default are, preceded by the type’s “name”, and this is indeed an important feature of \zref-clever. This is optional however, and the typeset option controls this behavior. It can receive values ref, in which case it typesets only the reference(s), name, in which case it typesets only the name(s), or both, in which case it typesets, well, both of them. Note that, when value name is used, the name is still typeset according to the set of references given to \zcref. For example, for multiple references, the plural form is used, capitalization options are honored, etc. Also hyperlinking behaves just as if the references were present and, depending on the corresponding options, the name may be linked to the first reference of the type group. The noname and noref options are convenience aliases for typeset=ref and typeset=name, respectively.

The sort option controls whether the list of (labels) received as argument by \zcref should be sorted or not. It is a boolean option, and defaults to true. The nosort option is a convenience alias for sort=false.

Sorting references of the same type can be done with well defined logical criteria. They either have the same counter or their counters share a clear hierarchical relation (in the resetting behavior), such that a definite sorting rule can be inferred from the label’s data. The same is not true for sorting of references of different types. Should “tables” come before or after “figures”? The typesort option allows to specify the sorting priority of different reference types. It receives as value a comma separated list of reference types, specifying that their sorting is to be done in the order of that list. But typesort does not need to receive all possible reference types. The special value \{\text{other types}\} (yes, double braced, one for \l3keys, so that the second can make the list) can be placed anywhere along the list, to specify the sort priority of any type not
included explicitly. If \{othertypes\} is not present in the list, it is presumed to be at
the end of it. Any unspecified types (that is, those falling implicitly or explicitly into
the \{othertypes\} category) get sorted between themselves in the order of their first
appearance in the label list given as argument to \zcref. I presume the common use
cases will not need to specify \{othertypes\} at all but, for the sake of example, if you
just really dislike equations, you could use typesort=\{(\{othertypes\})), equation\).
typesort's default value is \{part, chapter, section, paragraph\}, which places
the sectioning reference types first in the list, in their hierarchical order, and leaves
everything else to the order of appearance of the labels. The notypesort option behaves
like typesort=\{(\{othertypes\}))) would do, that is, it sorts all types in the order of the
first appearance in the labels' list.

comp \zcref can automatically compress a set of references of the same type into a range,
when they occur in immediate sequence. The comp controls whether this compression
should take place or not. It is a boolean option, and defaults to true. The nocomp option
is a convenience alias for comp=false. Of course, for better compression results the sort
is recommended, but the two options are technically independent.

The endrange option provides additional control over how the end reference of a
range is typeset, so as to achieve terse ranges. The option can operate in two technically
different ways. It may receive one of a number of predefined values, which can process
the end reference of the range, comparing it with the beginning reference, to achieve
a given end result.\footnote{For the \TeX{}nically inclined: those values that perform some processing – namely stripprefix, pagecomp,
and pagecomp2 – fully expand the references (x-type expansion) before comparing them, since it makes sense
to perform this task as close as possible to the printed representation of the references. I don't expect this to be
a problem in normal use cases, but it does represent a limitation on what the references can contain. In case
some control over this is needed, check the zref-clever/endrange-setup hook in the code documentation.}
Or, it can specify a label property to be used directly, without
any processing. The available predefined values are: ref, stripprefix, pagecomp,
and pagecomp2. ref corresponds to the default behavior, and instructs \zcref to use
whatever property was set at the ref option for the end of range reference. stripprefix
strips the common part at the start of each reference from the end one. pagecomp is
the equivalent of stripprefix for page numbers, it does the same thing, but only if
the references are comprised exclusively of Arabic numerals. pagecomp2 is a variant of
pagecomp that leaves at least two digits at the end reference (except for a leading zero).
If values other than the predefined ones are given to endrange they are considered as
label properties, as long as they are declared. This property is used to typeset the end
of range reference if the label contains it, and if both references would be “compressible”
according to the comp option, otherwise the property specified by the ref option is
used. This is useful for things like sub-elements for which we can build a proper
abbreviated sub-reference and populate the label with it (some compatibility modules
already provide a number of such properties, but other ones can be built with zref, as
needed).

By default (that is, when the range option is not given), \zcref typesets a complete
list of references according to the \langle labels \rangle it received as argument, and only compresses
some of them into ranges if the comp option is enabled and if references of the same
type occur in immediate sequence. The range option makes \zcref behave differently.
Sorting is implied by this option (the sort option is disregarded) and, for each reference
type group in \langle labels \rangle, \zcref builds a range from the first to the last reference in it, even
if references in between do not occur in immediate sequence. It is a boolean option, and
the package's default is range=false. The option given without a value is equivalent to range=true (in the \texttt{l3keys} jargon, the option's default is true). \zcref is smart enough to recognize when the first and last references of a type do happen to be contiguous, in which case it typesets a "pair", instead of a "range". But this behavior can be disabled by setting the rangetopair option to false.

The cap option controls whether the reference type names should be capitalized or not. It can receive values true or false, and it can also be set for specific reference types or languages (see Section 9). The option given without a value is equivalent to cap=true. The nocap option is a convenience alias for cap=false. The capfirst option ensures that the reference type name of the first type block is capitalized, even when cap is set to false.

The abbrev option controls whether to use abbreviated reference type names when they are available. It can receive values true or false, and it can also be set for specific reference types or languages (see Section 9). The option given without a value is equivalent to abbrev=true. The noabbrev option is a convenience alias for abbrev=false. The noabbrevfirst ensures that the reference type name of the first type block is never abbreviated, even when abbrev is set to true.

\texttt{S} for “Sentence”. The S option is a convenience alias for capfirst=true, noabbrevfirst=true, and is intended to be used in references made at the beginning of a sentence. It is highly recommended that you make a habit of using the S option for beginning of sentence references. Even if you do happen to be currently using cap=true, abbrev=false, proper semantic markup will ensure you get expected results even if you change your mind in that regard later on. For that reason, it was made short and mnemonic, it can't get any easier.

The hyperref option controls the use of hyperref by zref-clever and takes values auto, true, false. The default value, auto, makes zref-clever use hyperref if it is loaded, meaning that references made with \zcref get hyperlinked to the anchors of their respective \langle\texttt{labels}\rangle. true does the same thing, but warns if hyperref is not loaded (hyperref is never loaded for you). In either of these cases, if hyperref is loaded, module zref-hyperref is also loaded by zref-clever. false means not to use hyperref regardless of its availability. This is a preamble only option, but \zcref provides granular control of hyperlinking by means of its starred version.

The nameinlink option controls whether the type name should be included in the reference hyperlink or not (provided there is a link, of course). Naturally, the name can only be included in the link of the first reference of each type block. nameinlink can receive values true, false, single, and tsingle. When the value is true the type name is always included in the hyperlink. When it is false the type name is never included in the link. When the value is single, the type name is included in the link only if \zcref is typesetting a single reference (not necessarily having received a single label as argument, as they may have been compressed), otherwise, the name is left out of the link. When the value is tsingle, the type name is included in the link for each type block with a single reference, otherwise, it isn't. An example: suppose you make a couple of references to something like \zcref{chap:chapter1} and \zcref{chap:chapter1, sec:section1, fig:figure1, fig:figure2}. The “figure” type name will only be included in the hyperlink if nameinlink option is set to true. If it is set to tsingle, the first reference will include the name in the link for “chapter”, as expected, but also in the second reference the “chapter” and “section” names will be included in their
respective links, while that of “figure” will not. If the option is set to single, only the name for “chapter” in the first reference will be included in the link, while in the second reference none of them will. The package’s default is nameinlink=tsingle, and the option given without a value is equivalent to nameinlink=true.

The lang option controls the language used by \zcref when looking for language-specific reference format options (see Section 9). The default value, current, uses the current language, as defined by babel or polyglossia (or english if none of them is loaded). Value main uses the main document language, as defined by babel or polyglossia (or english if none of them is loaded). The lang option also accepts that the language be specified directly by its name, as long as it’s a language known by zref-clever. For more details on Internationalization, see Section 10.

The d option sets the declension case, and affects the type name used for typesetting the reference. Whether this option is operative, and which values it accepts, depends on the declared setup for each language. For details, see Section 10.

This set of options revolving around nudge aims to offer some guard against mischievous automation on the part of zref-clever by providing a number of “nudges” (compilation time messages) for cases in which you may wish to revise material surrounding the reference – an article, a preposition – according to the reference typeset results. Useful mainly for languages which inflect the preceding article to gender and/or number, but may be used generally to fine-tune the language and style around the cross-references made with \zcref. The nudge option is the main entrance to this feature and takes values true, false, ifdraft, or iffinal. The first two, respectively, enable or disable the “nudging” unconditionally. With ifdraft, nudge keeps quiet when option draft is given to \documentclass, while with iffinal, nudging is only enabled when option final is (explicitly) passed to \documentclass. The option given without a value is equivalent to nudge=true and the package’s default is nudge=false. nonudge is a convenience alias for nudge=false, and can be used to silence individual references. The nudgeif option controls the events which may trigger a nudge. It takes a comma-separated list of elements, and recognizes values multitype, comptosing, gender, and all. The multitype nudge warns when the reference is composed by multiple type blocks (see Section 9). The comptosing nudge let’s you know when multiple labels of the same type have been compressed to a singular type name form. It can be combined with the sg option, which is the way to tell \zcref you know it’s a singular and so not to nudge if a compression to singular occurs, but to nudge if the contrary occurs, that is, when a plural type name form is employed. The gender nudge must be combined with option g, and depends on the language having support for it. In essence language files can store the gender(s) of each type name (this is done for built-in language files, but can also be done with \zcLanguageSetup for languages declared to support it). The g option let’s you specify the gender you expect for that particular reference and the nudge is triggered if there is a mismatch between g and the gender(s) for the type name in the language file. Both the comptosing and the gender nudges have a type block as its scope. See Section 10 for more details and intended use cases of the “nudging” feature.

The font option can receive font styling commands to change the appearance of the whole reference list (see also the namefont and reffont reference format options in Section 9). It does not affect the content of the note, however. The option is intended exclusively for commands that only change font attributes: style, family, shape, weight,
size, color, etc. Anything else, particularly commands that may generate typeset output, is not supported. Given how package options are handled by \LaTeX, the fact that this option receives commands as value means this option \textit{can't} be set at load time, as a package option. If you want to set it globally, use \texttt{\zcsetup} instead.

The \texttt{note} option receives as value some text to be typeset at the end of the whole reference list. It is separated from it by \texttt{notesep} (see Section 9).

Provides integration of \texttt{zref-clever} with the \texttt{zref-check} package. The option is only functional in the document body and if \texttt{zref-check} has been loaded. \texttt{check} requires a value, which works exactly like the optional argument of \texttt{\zcheck}, and can receive both checks and \texttt{\zcheck}'s options. And the checks are performed for each label in \texttt{\{\labels\}} received as argument by \texttt{\zcref}. See the User manual of \texttt{zref-check} for details. The checks done by the \texttt{check} option in \texttt{\zcref} comprise the complete reference, including the \texttt{note} (see Section 9).

The \texttt{countertype} option allows to specify the “reference type” of each counter, which is stored as a label property when the label is set. This “reference type” is what determines how a reference to this label will eventually be typeset when it is referred to (see Section 8). A value like \texttt{countertype = \{foo = bar\}} sets the foo counter to use the reference type bar. There’s only need to specify the \texttt{countertype} for counters whose name differs from that of their type, since \texttt{zref-clever} presumes the type has the same name as the counter, unless otherwise specified. Also, the default value of the option already sets appropriate types for basic \LaTeX{} counters, including those from the standard classes. Setting a counter type to an empty value removes any (explicit) type association for that counter, since \texttt{zref-clever} assumes the type has the same name as the counter, unless otherwise specified. Since this option only affects how labels are set, it is not available in \texttt{\zcref}.

The sorting and compression of references done by \texttt{\zcref} requires that we know the counter associated with a particular label but also information on any counter whose stepping may trigger its resetting, or its “enclosing counters”. This information is not easily retrievable from the counter itself but is (normally) stored with the counter that does the resetting. The \texttt{counterresetters} option adds counter names, received as a comma separated list, to the list of counters \texttt{zref-clever} uses to search for “enclosing counters” of the counter for which a label is being set. Unfortunately, not every counter gets reset through the standard machinery for this, including some \LaTeX{} kernel ones (e.g. the enumerate environment counters). For those, there is really no way to retrieve this information directly, so we have to just tell \texttt{zref-clever} about them. And that’s what the \texttt{counterresetby} option is made for. It receives a comma separated list of key=value pairs, in which key is the counter, and value is its “enclosing counter”, that is, the counter whose stepping results in its resetting. This is not really an “option” in the sense of “user choice”, it is more of a way to inform \texttt{zref-clever} of something it cannot know or automatically find in general. One cannot place arbitrary information there, or \texttt{zref-clever} can be thoroughly confused. The setting must correspond to the actual resetting behavior of the involved counters. \texttt{counterresetby} has precedence over the search done in the \texttt{counterresetters} list. The default value of \texttt{counterresetters} includes the counters for sectioning commands of the standard classes which, in most cases, should be the relevant ones for cross-referencing purposes. The default value of \texttt{counterresetby} includes the enumerate environment counters. So, hopefully, you don’t need to ever bother with either of these options. But, if you do, they are here. Use them with caution though. Since these options only affect how labels are set, they are
LATEX's \refstepcounter sets two variables which potentially affect the \label after it: \@currentlabel and \@currentcounter. Actually, traditionally, only the current label was thus stored, the current counter was added to \refstepcounter somewhat recently (with the 2020-10-01 kernel release). But, since zref-clever relies heavily on the information of what the current counter is, it must set zref to store that information with the label, as it does. As long as the document element we are trying to refer to uses the standard machinery of \refstepcounter we are on solid ground and can retrieve the correct information. However, it is not always ensured that \@currentcounter is kept up to date. For example, packages which handle labels specially, for one reason or another, may or may not set \@currentcounter as required. Considering the addition of \@currentcounter to \refstepcounter itself is not that old, it is likely that in a good number of places a reliable \@currentcounter is not really in place. Therefore, it may happen we need to tell zref-clever what the current counter is in certain circumstances, and that's what currentcounter does. The same as with the previous two options, this is not really an "user choice" kind of option, but a way to tell zref-clever a piece of information it has no means to retrieve automatically. The setting must correspond to the actual "current counter", meaning here "the counter underlying \@currentlabel" in a given situation. Also, when using the currentcounter option, make sure the setting is duly grouped because, if set, it has precedence over \@currentcounter and, contrary to the later, the former is not reset the next time \refstepcounter runs. Its default value is, quite naturally, \@currentcounter. Since this option only affects how labels are set, it is not available in \zcref.

Some packages, document classes, or LaTeX features may require specific support to work with zref-clever (see Section 12). zref-clever tries to make things smoother by covering some of them. Depending on the case, this can take the form of some simple setup for zref-clever, or may involve the use of hooks to external environments or commands and, eventually, a patch or redefinition. By default, all the available compatibility modules are enabled. Should this be undesired or cause any problems in your environment, the option nocompat can selectively or completely inhibit their loading. nocompat receives a comma separated list of compatibility modules to disable (for the list of available modules and details about each of them, see Section 13). You can disable all modules by setting nocompat without a value (or an empty one). This is a preamble only option.

8 Reference types

A "reference type" is the basic zref-clever setup unit for specifying how a cross-reference group of a certain kind is to be typeset. Though, usually, it will have the same name as the underlying LATEX counter, they are conceptually different. zref-clever sets up reference types and an association between each counter and its type, it does not define the counters themselves, which are defined by your document. One reference type can be associated with one or more counters, and a counter can be associated with different types at different points in your document. But each label is stored with only one type, as specified by the counter-type association at the moment it is set, and that determines how the reference to that label is typeset. References to different counters of the same type are grouped together, and treated alike by \zcref. A reference type may be known to zref-clever when the counter it is associated with is not actually defined, and this inconsequential. In
practice, the contrary may also happen, a \textit{counter} may be defined but we have no \textit{type} for it, but this must be handled by \texttt{zref-clever} as an error (at least, if we try to refer to it), usually a "missing name" error.

\texttt{zref-clever} provides default settings for the following reference types: \texttt{part}, \texttt{chapter}, \texttt{section}, \texttt{paragraph}, \texttt{appendix}, \texttt{subappendix}, \texttt{page}, \texttt{line}, \texttt{figure}, \texttt{table}, \texttt{item}, \texttt{footnote}, \texttt{endnote}, \texttt{note}, \texttt{equation}, \texttt{theorem}, \texttt{lemma}, \texttt{corollary}, \texttt{proposition}, \texttt{definition}, \texttt{proof}, \texttt{result}, \texttt{remark}, \texttt{example}, \texttt{algorithm}, \texttt{listing}, \texttt{exercise}, and \texttt{solution}. Therefore, if you are using a language for which \texttt{zref-clever} has built-in support (see Section 10), these reference types are available for use out of the box.\footnote{There may be slight availability differences depending on the language, but \texttt{zref-clever} strives to keep this complete list available for the languages it has built-in language files.}

And, in any case, it is always easy to setup custom reference types with \texttt{\zcRefTypeSetup} or \texttt{\zcLanguageSetup} (see Sections 6, 9 and 10).

The association of a \textit{counter} to its \textit{type} is controlled by the \texttt{countertype} option. As seen in its documentation, \texttt{zref-clever} presumes the \textit{type} to be the same as the \textit{counter} unless instructed otherwise by that option. This association, as determined by the local value of the option, affects how the \textit{label} is set, which stores the \textit{type} among its properties. However, when it comes to typesetting, that is from the perspective of \texttt{\zcref}, only the \textit{type} matters. In other words, how the reference is supposed to be typeset is determined at the point the \textit{label} gets set. In sum, they may be namesakes (or not), but \textit{type} is \textit{type} and \textit{counter} is \textit{counter}.

Indeed, a reference type can be associated with multiple counters because we may want to refer to different document elements, with different \textit{counters}, as a single \textit{type}, with a single name. One prominent case of this are sectioning commands: \texttt{\section}, \texttt{\subsection}, and \texttt{\subsubsection} have each their \textit{counter}, but we’d like to refer to all of them by "sections" and group them together. The same for \texttt{\paragraph} and \texttt{\subparagraph}.

There are also cases in which we may want to use different \textit{reference types} to refer to document objects sharing the same \textit{counter}. Notably, the environments created with \LaTeX’s \texttt{\newtheorem} command and the \texttt{\appendix}.

One more observation about “reference types” is due here. A \textit{type} is not really “defined” in the sense a variable or a function is. It is more of a “name” which \texttt{zref-clever} uses to look for a whole set of type-specific reference format options (see Section 9). Each of these options individually may be “set” or not, “defined” or not. And, depending on the setup and the relevant precedence rules for this, some of them may be required and some not. In practice, \texttt{zref-clever} uses the \textit{type} to look for these options when it needs one, and issues a compilation warning when it cannot find a suitable value.

\section{Reference format}

Formatting how the reference is to be typeset is, quite naturally, a big part of the user interface of \texttt{zref-clever}. In this area, we tried to balance “flexibility” and “user friendliness”. But the former does place a big toll overall, since there are indeed many places where tweaking may be desired, and the settings may depend on at least two important dimensions of variation: the reference type and the language. Combination of those necessarily makes for a large set of possibilities. Hence, the attempt here is
to provide a rich set of “handles” for fine tuning the reference format but, at the same time, do not require detailed setup by the users, unless they really want it.

With that in mind, we have settled with an user interface for reference formatting which allows settings to be done in different scopes, with more or less overarching effects, and some precedence rules to regulate the relation of settings given in each of these scopes. There are four scopes in which reference formatting can be specified by the user, in the following precedence order: i) as general options; ii) as type-specific options; iii) as language- and type-specific options; and iv) as language-specific default options. Besides those, there’s a fifth internal scope, with the least priority of all, a “fallback”, for the cases where it is meaningful to provide some value, even for an unknown language. The package itself places the default setup for reference formatting at low precedence levels, and the users can easily and conveniently override them as desired.

“General” options (i) can be given by the user in the optional argument of \zcref, but also set through \zcsetup (see Section 7). “Type” specific options (ii) are handled by \zcRefTypeSetup (see Section 6). “Language” options, whether “type” specific (iii) or “default” (iv) have their user interface in \zcLanguageSetup, and have their values populated by the package’s built-in language files (see Section 10). Not all reference format specifications can be given in all of these scopes, though. Some of them can’t be type-specific, others must be type-specific, so the set available in each scope depends on the pertinence of the case. Table 1 introduces the available reference format options, which will be discussed in more detail soon, and lists the scopes in which each is available.

Understanding the role of each of these reference format options is likely eased by some visual schemes of how \zref-clever builds a reference based on the labels’ data and the value of these options. Take a ref to be that which a standard \LaTeX \ref would typeset. A \zref-clever “reference block”, or ref-block, is constructed as:

\[
\text{ref-block} \equiv \\
\text{preref*} \text{ preref } \text{ ref } \text{ postref } \text{ postref*}
\]

Where the refbounds option, which receives as value a comma separated list of four items in the form \{preref*,preref,postref,postref*\}, sets the surrounding elements to ref\textsuperscript{4}. A ref-block is built for each label given as argument to \zcref. When the \{labels\} argument is comprised of multiple labels, each “reference type group”, or type-group is potentially made from the combination of single reference blocks, “reference block pairs”, “reference block lists”, or “reference block ranges”, where each is respectively built as:

\[
\text{type-group} \text{ is a combination of:}
\]

\[
\text{ref-block} \text{ ref-block1 } \text{ pairsep } \text{ ref-block2}
\]

\textsuperscript{4}As usual, if each of the items contains start or end spaces, or commas anywhere, they must be protected by a pair of braces. However, care is taken that empty items don’t need such protection. So you can set, for example, something like \text{refbounds=}\{,\ldots\} to get parentheses around your references, outside the hyperlink.
<table>
<thead>
<tr>
<th>Typesetting</th>
<th>General</th>
<th>Type</th>
<th>Language</th>
</tr>
</thead>
<tbody>
<tr>
<td>(necessarily not type-specific)</td>
<td>tpairsep</td>
<td>(i)</td>
<td>*</td>
</tr>
<tr>
<td>tlistsep</td>
<td>(ii)</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>tlastsep</td>
<td>(iii)</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>notesep</td>
<td>(iv)</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>Typesetting</td>
<td>namesep</td>
<td>(necessarily not type-specific)</td>
<td>*</td>
</tr>
<tr>
<td>(possibly type-specific)</td>
<td>pairsep</td>
<td>(i)</td>
<td>*</td>
</tr>
<tr>
<td>listsep</td>
<td>(ii)</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>lastsep</td>
<td>(iii)</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>rangesep</td>
<td>(iv)</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>refbounds</td>
<td>(possibly type-specific)</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>Typesetting</td>
<td>Name-sg</td>
<td>(necessarily type-specific)</td>
<td>*</td>
</tr>
<tr>
<td>name-sg</td>
<td>(i)</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>name-pl</td>
<td>(ii)</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>Name-sg-ab</td>
<td>(iii)</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>name-sg-ab</td>
<td>(iv)</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>Name-pl-ab</td>
<td>(v)</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>name-pl-ab</td>
<td>(vi)</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>Font</td>
<td>namefont</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>reffont</td>
<td>*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>cap</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>abbrev</td>
<td>*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>endrange</td>
<td>*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>rangetopair</td>
<td>*</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 1: Reference format options and their scopes

To complete a “type-block”, a type-group only needs to be accompanied by the “type name”:

```
 ref-block1 listsep ref-block2 listsep ref-block3 ... 
 ... ref-blockN-1 lastsep ref-blockN 
 ref-block1 rangesep ref-blockN 
```

The type-name is determined not by one single reference format option but by the appropriate one among the [Nn]ame- options according to the composition of
type-group and the general options. The reference format name options are eight in
total: Name-sg, name-sg, Name-pl, name-pl, Name-sg-ab, name-sg-ab, Name-pl-ab, and
name-pl-ab. The initial uppercase “N” signals the capitalized form of the type name.
The -sg suffix stands for singular, while -pl for plural. The -ab is appended to the
abbreviated type name form options. When setting up a type, not necessarily all forms
need to be provided. zcref-clever will always use the non-abbreviated form as a fallback
to the abbreviated one, if the later is not available. Hence, if a reference type is not
intended to be used with abbreviated names (the most common case), only the basic
four forms are needed. Besides that, if you are using the cap option, only the capitalized
forms will ever be required by \zcref, so you can get away setting only Name-sg and
Name-pl. You should not do the contrary though, and provide only the non-capitalized
forms because, even if you are using the nocap option, the capitalized forms will be still
required for capfirst and S options to work. Whatever the case may be, you need not
worry too much about being remiss in this area: if \zcref does lack a name form in any
given reference, it will let you know with a compilation warning (and will typeset the
usual missing reference sign: “??”).

A complete reference typeset by \zcref may be comprised of multiple type-blocks,
in which case the “type-block-group” can also be made of single type blocks, “type
block pairs” or “type block lists”, where each is respectively built as:

\begin{verbatim}
  type-block-group is one of:

  type-block

  type-block1 tpairsep type-block2

  type-block1 tlistsep type-block2 tlistsep type-block3 ...

  ... tlastsep type-blockN-1 tlastsep type-blockN
\end{verbatim}

Finally, since \zcref can also receive an optional note, its full typeset output is
built as:

\begin{verbatim}
A complete \zcref reference:

  type-block-group notesep note
\end{verbatim}

Reference format options can yet be divided in three general categories: i) “type-
setting” options, the ones which we have seen thus far, as “building blocks” of the
reference; ii) “font” options, which control font attributes of parts of the reference,
namely namefont and reffont; and iii) “other” options. “Typesetting” options are
intended exclusively for typesetting material: things you expect to see in the output of
your references. “Font” options set the font, respectively, for the type-name and for ref
(to set the font for the whole reference, see the font option in Section 7). These options
are intended exclusively for commands that only change font attributes: style, family,
shape, weight, size, color, etc. In either case, anything other than their intended uses is
not supported.
Finally, a comment about the internal “fallback” reference format values mentioned above. These “last resort” option values are required by zref-clever for a clear particular case: if the user loads either babel or polyglossia, or explicitly sets a language, with a language that zref-clever does not know and has no language file for, it cannot guess what language that is, and thus has to provide some reasonable “language agnostic” default, at least for the options for which this makes sense. Users do not need to have access to this scope, since they know the language of their document, or know the values they want for those options, and can set them as general options, type-specific options, or language options through the user interface provided for the purpose. But the “fallback” options are documented here so that you can recognize when you are getting these values and change them appropriately as desired. Though hopefully reasonable, they may not be what you want. The “fallback” option values are the following:

- **tpairsep** = {...},
- **tlistsep** = {...},
- **tlastsep** = {...},
- **notesep** = {...},
- **namesep** = \{nobreakspace\},
- **pairsep** = {...},
- **listsep** = {...},
- **lastsep** = {...},
- **rangesep** = \{textendash\},

### 9.1 Advanced reference formatting

The reference format options discussed above and presented in Table 1 should suffice for most needs. However, if more fine-grained control of the reference format is needed, this can be achieved through a more detailed specification of refbounds for the different cases in which they may occur when a reference is processed. The options available for this purpose are presented in Table 2.

The “base” options are the actually operative ones, while the “derived” options are convenience aliases to set multiple base options in one go. In the naming scheme of these options, as is easy to presume, “first” refers to the first reference of a type-block, “mid” to the middle ones, and “last” to the last reference of the type-block. Less obviously, but hopefully still mnemonic enough, “sg” stands for “single”, “pb” and “pe” for “pair begin” and “pair end”, and finally “rb” and “re” for “range begin” and “range end”. Each of them which receives as value a comma separated list of four items in the form \{preref*, preref, postref, postref*\}, just like refbounds.

The base options are mutually exclusive, which means, for example, that it is not sufficient to set refbounds-first to define the behavior of all first references of a type block. refbounds-first is the value used for the first reference when not single, not the beginning of a pair, and not the beginning of a range. Setting a group of them is the purpose of the derived options. Each of these sets all options under it. Some examples. +refbounds-first sets refbounds-first, refbounds-first-sg, refbounds-first-pb, and refbounds-first-rg. In turn, +refbounds-first-rb sets refbounds-first-rb and refbounds-first-rb. And quite conveniently, +refbounds sets +refbounds-first, +refbounds-mid, and +refbounds-last, it is hence sufficient to set it to define the behavior of what is typeset around all references for the whole
Table 2: Advanced reference format options and their scopes

<table>
<thead>
<tr>
<th>General</th>
<th>Type</th>
<th>Language</th>
</tr>
</thead>
<tbody>
<tr>
<td>(i)</td>
<td>(ii)</td>
<td>(iii)</td>
</tr>
<tr>
<td>Base options</td>
<td>refbounds-first</td>
<td>•</td>
</tr>
<tr>
<td></td>
<td>refbounds-first-sg</td>
<td>•</td>
</tr>
<tr>
<td></td>
<td>refbounds-first-pb</td>
<td>•</td>
</tr>
<tr>
<td></td>
<td>refbounds-first-rb</td>
<td>•</td>
</tr>
<tr>
<td></td>
<td>refbounds-mid</td>
<td>•</td>
</tr>
<tr>
<td></td>
<td>refbounds-mid-rb</td>
<td>•</td>
</tr>
<tr>
<td></td>
<td>refbounds-mid-re</td>
<td>•</td>
</tr>
<tr>
<td></td>
<td>refbounds-last</td>
<td>•</td>
</tr>
<tr>
<td></td>
<td>refbounds-last-pe</td>
<td>•</td>
</tr>
<tr>
<td></td>
<td>refbounds-last-re</td>
<td>•</td>
</tr>
<tr>
<td>Derived options</td>
<td>+refbounds-first</td>
<td>•</td>
</tr>
<tr>
<td>(groups)</td>
<td>+refbounds-mid</td>
<td>•</td>
</tr>
<tr>
<td></td>
<td>+refbounds-last</td>
<td>•</td>
</tr>
<tr>
<td></td>
<td>+refbounds-rb</td>
<td>•</td>
</tr>
<tr>
<td></td>
<td>+refbounds-re</td>
<td>•</td>
</tr>
<tr>
<td></td>
<td>+refbounds</td>
<td>•</td>
</tr>
</tbody>
</table>

Table 2: Advanced reference format options and their scopes
type-block. As you probably guessed by now, the refbounds option presented in Table 1 is an alias of +refbounds.

Given that base and derived options are actually setting the same group of underlying options (the base ones), the order in which they are given is relevant: the last one prevails. The idea here is to use first the derived options to set some general defaults, and then change one or another base option to handle exceptions as needed. Of course, how best to use them depends on the case.

10 Internationalization

zref-clever provides internationalization facilities and integrates with babel and polyglossia to adapt to the languages in use by either of these language packages, or to a language specified directly by the user. This is primarily relevant for reference format options, particularly reference type names (though not only, since most reference format options can have language-specific values see Section 9). But other features of the package also cater for language specific needs.

As far as language selection is concerned, if the language is declared and zref-clever has a built-in “language file” for it, most use cases will likely be covered by the lang option (see Section 7), and its values current and main. When the lang option is set to current or main, zref-check will use, respectively, the current or main language of the document, as defined by babel or polyglossia. Users can also set lang to a specific

5Technically, zref-clever uses \languagename and \bbl@main@language for babel, and \babelname and
Table 3: Declared languages and aliases

<table>
<thead>
<tr>
<th>Language</th>
<th>Aliases</th>
<th>Language</th>
<th>Aliases</th>
</tr>
</thead>
<tbody>
<tr>
<td>english</td>
<td>american</td>
<td>german</td>
<td>austrian</td>
</tr>
<tr>
<td></td>
<td>australian</td>
<td></td>
<td>germanb</td>
</tr>
<tr>
<td></td>
<td>british</td>
<td></td>
<td>ngerman</td>
</tr>
<tr>
<td></td>
<td>canadian</td>
<td></td>
<td>naustrian</td>
</tr>
<tr>
<td></td>
<td>newzealand</td>
<td></td>
<td>nswissgerman</td>
</tr>
<tr>
<td></td>
<td>UKEnglish</td>
<td></td>
<td>swissgerman</td>
</tr>
<tr>
<td></td>
<td>USEnglish</td>
<td></td>
<td></td>
</tr>
<tr>
<td>french</td>
<td>acadian</td>
<td>portuguese</td>
<td>brazilian</td>
</tr>
<tr>
<td></td>
<td>canadien</td>
<td></td>
<td>brazil</td>
</tr>
<tr>
<td></td>
<td>francais</td>
<td></td>
<td>portuges</td>
</tr>
<tr>
<td></td>
<td>frenchb</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>spanish</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>dutch</td>
<td></td>
</tr>
</tbody>
</table>

language directly, in which case babel and polyglossia are disregarded. zref-clever provides a number of built-in “language files”, for the languages listed in Table 3, which also includes the declared aliases to those languages.

zref-clever’s “language files” are loaded sparingly and lazily. A language file for a single language – that specified by user options in the preamble, which by default is the current document language – is loaded at begin{document}. If any other language file is needed, it is loaded on the fly, if and when required. Of course, in either case, conditioned on availability. In sum, zref-clever loads as little as possible, but allows for convenient on the fly loading of language files if the values are indeed required, without users having to worry about it at all.

But if the built-in language files do not cover your language, or if you’d like to adjust some of the default language-specific options, this can be done with \zcDeclareLanguage, \zcDeclareLanguageAlias, and \zcLanguageSetup.\footnote{Needless to say, if you’d like to contribute a language file or improve an existing one, that is much welcome at https://github.com/gusbrs/zref-clever/issues.}

\zcDeclareLanguage\zcDeclareLanguage[(options)]{(language)}

Declare a new language for use with zref-clever. If \langle language\rangle has already been declared, just warn. The \langle options\rangle argument receives the usual key=value list and recognizes three keys: declension, gender, and allcaps. declension receives a comma separated list of valid declension cases for \langle language\rangle. The first element of the list is considered to be the default case, both for the d option in \zcref and for the case option in \zcLanguageSetup. Similarly, gender receives a comma separated list of genders for \langle language\rangle. The elements in this list are those which are recognized as valid for the language for both the g option in \zcref and the gender option in \zcLanguageSetup. There is no default presumed in this case. Finally, allcaps can be used with languages for which nouns must be always capitalized for grammatical reasons. For a language declared with the allcaps option, the cap reference option (see Section 7) is disregarded, \mainbabelname for polyglossia, which boils down to zref-clever always using babel names internally, regardless of which language package is in use. Indeed, an acquainted user will note that Table 3 contains only babel language names.
Table 4: Options for declared languages

<table>
<thead>
<tr>
<th>Language</th>
<th>declension</th>
<th>gender</th>
<th>allcaps</th>
</tr>
</thead>
<tbody>
<tr>
<td>english</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>french</td>
<td>-</td>
<td>f,m</td>
<td>-</td>
</tr>
<tr>
<td>german</td>
<td>N,A,D,G</td>
<td>f,m,n</td>
<td>yes</td>
</tr>
<tr>
<td>portuguese</td>
<td>-</td>
<td>f,m</td>
<td>-</td>
</tr>
<tr>
<td>spanish</td>
<td>-</td>
<td>f,m</td>
<td>-</td>
</tr>
<tr>
<td>dutch</td>
<td>-</td>
<td>f,m,n</td>
<td>-</td>
</tr>
</tbody>
</table>

and \zcref always uses the capitalized type name forms. This means that language files for languages with such a trait can be halved in size, and that user customization for them is simplified, only requiring the capitalized name forms. On the other hand, the non-capitalized name-reference format options are rendered no-op for the language in question. Table 4 presents an overview of the options in effect for the languages declared by zref-clever. \zcDeclareLanguage is preamble only.

\zDeclareLanguageAlias{\langle language alias\rangle}{\langle aliased language\rangle}

Declare \langle language alias\rangle to be an alias of \langle aliased language\rangle. \langle aliased language\rangle must be already known to zref-clever. Once set, the \langle language alias\rangle is treated by zref-clever as completely equivalent to the \langle aliased language\rangle for any language specification by the user. \zDeclareLanguageAlias is preamble only.

\LanguageSetup{\langle language\rangle}{\langle options\rangle}

Sets language-specific reference format options for \langle language\rangle (see Section 9), be they type-specific or not. \langle language\rangle must be already known to zref-clever. Besides reference format options, \zLanguageSetup knows three other keys: type, case, and gender. The first two work like a "switch" affecting the options following it. For example, if type=foo is given in \langle options\rangle the options following it will be set as type-specific options for reference type foo. Similarly, after case=X (provided X is a valid declension case for \langle language\rangle), the following [Nn]ame-options will set values for the X declension case (other reference format options are not affected by case). Before the first occurrence of either type or case default values are set. For case this means the default declension case, which is the first element of the list provided to the declension option in \zDeclareLanguage. For type this means language-specific but not type-specific option values (see Section 9). An empty valued type= key can also "unset" the type. The gender key sets the gender of the current type (provided the value it receives is one of the declared genders for \langle language\rangle). For types which have multiple valid genders for a given language, the option can also receive a comma separated list. \zLanguageSetup is preamble only.

A couple of examples to illustrate the syntax of \zLanguageSetup:

\zLanguageSetup{french}{
  type = section ,
  gender = f ,
}
As already noted, \texttt{zref-clever} has some support for languages with declension. This means mainly the declension of \textit{nouns}, which is used for the reference type names. But some tools are also provided to support the user in getting better results for the text surrounding a reference, particularly for numbered and gendered articles, even if those don’t have their typeset output automated.

For reference type names, the declension cases for each language must be declared with \texttt{\zcDeclareLanguage}, and the name reference format options must be provided for each case, which is done for built-in language files of languages which have noun declension, and can be done by the user with \texttt{\zcLanguageSetup}, as we’ve seen. \texttt{zref-clever} does not try to guess or infer the case though, you must tell it to \texttt{\zcref}. And this is done by means of the \texttt{d} option (see Section 7). So you may write something like “nach den \texttt{\zcref[d=D]{sec:section-1,sec:section-2}}” to get “nach den Abschnitten 1 und 2”. Or “trotz des \texttt{\zcref[d=G]{eq:theorem-1}}” to get “trotz des Theorems 1”.

Regarding the text surrounding the reference – the inflected article, the passing preposition, etc. –, the issue is more delicate. \texttt{zref-clever} cannot and intends not to typeset those for you. But, depending on the language, it is true that the kind of automation provided by \texttt{zref-clever} may betray your best efforts to get a proper surrounding text. Multiple labels passed to \texttt{\zcref} may result in singular type names, either because the labels are of different types, or because they got compressed into a single reference. References comprised of multiple type blocks may have each a name with a different gender. Or, worse, \texttt{tpairsep}, \texttt{tpairsep}, and \texttt{tlastsep} may not provide a general enough way to separate different type blocks in your language altogether. You may change something in your document that causes a label to change its type, and hence the gender of the type name. A page reference to a couple of floats which were by chance on the same page and all of a sudden no longer are. And so on.

In this area, the approach taken by \texttt{zref-clever} is to identify some typical situations in which your attention may be required in reviewing the surrounding text, and signal
it at compilation time. Just like bad boxes, for example. This feature can be enabled by
the nudge option (which is opt-in, see Section 7). There are three “nudges” available
for this purpose which trigger messages at different events: multitype, comptosing,
and gender. multitype nudges when a reference is comprised of multiple type blocks.
comptosing when multiple labels of the same type block have been compressed into a
single one and, hence, the type name used is singular. Finally, gender nudges when
there is a mismatch between the gender specified in \zcref with the g option and the
gender of the type name, as set in the language file or with \zcLanguageSetup, for each
type block. Which nudges to use is configurable with the option nudgeif. And, if you’re
sure of the results for a particular \zcref call, you can always silence the nudges locally
with the nonudge option.

The main reason to watch for multiple type references with the multitype nudge
is that bundling together automatically a list of type blocks is less smooth an operation
than it is for a single reference type. While it arguably works reasonably well for English,
ev en there it is not always flawless, and depending on the language, results may range
from "poor style" to outright wrong. A typical case would be of that of a language with
inflected articles and a reference with multiple types of different genders or numbers. For
example, in French, with a standard “au \zcref{cha:chapter-3, sec:section-3.1}”
we get “au chapitre 3 et section 3.1” which sounds ugly, at best. So we may be better off
writing instead “au \zcref{cha:chapter-3} et à la \zcref{sec:section-3.1}”. Or
something else, of course. But the general point is that, depending on circumstances
and on the language, the results of automating the grouping of multiple reference types,
as zref-clever is able to do, may leave things to be desired for. Hence it lets you know
when one such case occurs, so that you can review it for best results.

The case of the comptosing and gender nudges is more objective in nature, they
respectively signal mismatches of number and gender. When a reference is made with
\zcref to a single label we are sure the type name will be a singular form. However,
when \zcref receives multiple labels of the same type, the type name will normally be
a plural, but not necessarily so, since the labels may be compressed into a single one
(see the comp option in Section 7), in which case the singular is used. The compression
of multiple labels into a single reference should be an exception for default references,
but not so for page references, where it is easy to conceive practical situations where it
may occur. Suppose, for example, you have two contiguous floats in your document
and make a page reference to both of them. Will they end up in the same page or
not? Maybe we know what the current state is, but we cannot know what may happen
as the document keeps being edited. As a consequence, we don’t know whether that
reference will end up having a plural or a singular type name. That given, the logic
of the comptosing nudge is the following. If we are giving multiple labels to \zcref,
we can presume a plural type name, but we get a nudge in case the compression of the
labels results in a singular type name form. If one such compression did happen to one
of your references, you can use a singular article and then tell \zcref you did so with
option sg. The effect of the sg option is to inhibit the nudge when a compression to
singular occurs, but to do it instead when the compression cases to occur, that is, if we
get a plural type name again at some point.

The gender nudge aims to guard against one particular situation: possible changes
of a reference’s type. This does not occur by reason of any internal behavior of zref-clever,
but it may be caused by changes in the document. You may wish to change one theorem
into a proposition and, if you’re writing in French or Portuguese, for example, that
implies that the reference to it changes gender and the likely preceding article will no
longer pass to the reference. The gender nudge requires that the gender of each type
name and of each reference be explicitly specified. For the type names, this is done
for the built-in language files of languages were this matters, and can be done with \zcLanguageSetup as well. For the references, that is the purpose of the g option. When
there is a mismatch between the two for any type block, the nudge is triggered. Of
course, this means that the gender markup has to be supplied in the document at each
reference. And given such type changes may not be frequent for you, or considered not
particularly problematic, you’ll have to balance if doing so is worth it. Still, the feature
is available, and it’s up to you.

11 How-tos

This section gathers some usage examples, or “how-tos”, of cases which may require
some zref-clever setup, or usage adjustments, and each item is set around a cross-reference
“task” we’d like to perform with zref-clever.

11.1 Extended page references (varioref)

Task  Make cross-references to pages which are sensitive to the relative position between
the reference and the label being referred to using varioref.

The zref-vario package offers a layer of compatibility with varioref and provides \z...
counterparts for the latter’s main reference commands.

How-to 2: zref-vario

\documentclass{article}
\usepackage[zref-clever}
\usepackage[zref-vario]
\begin{document}
\section{Section 1}
\zlabel{sec:section-1}
\begin{figure}
A figure.
\zlabel{fig:figure-1}
\end{figure}
\begin{figure}
Another figure.
\zlabel{fig:figure-2}
\end{figure}
\zvref[S]{sec:section-1}
\zvpageref{fig:figure-1}
\zvrange{fig:figure-1}{fig:figure-2}
\zvpagerefrange{fig:figure-1}{fig:figure-2}
\zfullref{fig:figure-1}
\end{document}
11.2 \newtheorem

Since \LaTeX\’s \newtheorem allows users to create arbitrary numbered environments, with respective arbitrary counters, the most zref-clever can do in this regard is to provide some “typical” built-in reference types to smooth user setup but, in the general case, some user setup may be indeed required. The examples below are equaly valid for amsthm’s \newtheorem since, even it provides features beyond those available in the kernel, its syntax and underlying relation with counters is pretty much the same. The same for ntheorem. For thmtools’ \declaretheorem, though some adjustments to the examples below may be required, the basic logic is the same (there is no integration with the Refname, refname, and label options, which are targeted to the standard reference system, but you don’t actually need them to get things working conveniently).

Simple case

Task Setup up a new theorem environment created with \newtheorem to be referred to with \zcref. The theorem environment does not share its counter with other theorem environments, and one of zref-clever built-in reference types is adequate for my needs.

Suppose you set a “Lemma” environment with:

\begin{verbatim}
\newtheorem{lemma}{Lemma}[section]
\end{verbatim}

In this case, since zref-clever provides a built-in lemma type (for supported languages) and presumes the reference type to be the same name as the counter, there is no need for setup, and things just work out of the box. So, you can go ahead with:

How-to 3: \newtheorem, simple case

\begin{verbatim}
\documentclass{article}
\usepackage{zref-clever}
\newtheorem{lemma}{Lemma}[section]
\begin{document}
\section{Section 1}
\begin{lemma}
zlabel{lemma-1}
A lemma.
\end{lemma}
\zcref{lemma-1}
\end{document}
\end{verbatim}

If, however, you had chosen an environment name which did not happen to coincide with the built-in reference type, all you’d need to do is instruct zref-clever to associate the counter for your environment to the desired type with the countertype option:

How-to 4: \newtheorem, simple case

\begin{verbatim}
\documentclass{article}
\usepackage{zref-clever}
\zcsetup{countertype={lem=lemma}}
\newtheorem{lem}{Lemma}[section]
\begin{document}
\section{Section 1}
\begin{lem}
zlabel{lemma-1}
\end{lem}
\end{document}
\end{verbatim}
Shared counter

Task  Setup up two new theorem environments created with \newtheorem to be referred to with \zcref. The theorem environments share the same counter, and the available \zref-clever built-in reference types are adequate for my needs.

In this case, we need to set the countertype option in the appropriate contexts, so that the labels of each environment get set with the expected reference type. As we’ve seen (at Section 6), \zcsetup has local effects, so it can be issued inside the respective environments for the purpose. Even better, we can leverage the kernel’s new hook management system and just set it for all occurrences with \AddToHook{env⟨myenv⟩/begin}.

How-to 5: \newtheorem, shared counter

\documentclass{article}
\usepackage{zref-clever}
\AddToHook{env/mytheorem/begin}{\zcsetup{countertype={mytheorem=theorem}}}
\AddToHook{env/myproposition/begin}{\zcsetup{countertype={mytheorem=proposition}}}
\newtheorem{mytheorem}{Theorem}[section]
\newtheorem{myproposition}[mytheorem]{Proposition}
\begin{document}
\section{Section 1}
\begin{mytheorem}\zlabel{theorem-1}
A theorem.
\end{mytheorem}
\begin{myproposition}\zlabel{proposition-1}
A proposition.
\end{myproposition}
\zcref{theorem-1, proposition-1}
\end{document}

Custom type

Task  Setup up a new theorem environment created with \newtheorem to be referred to with \zcref. The theorem environment does not share its counter with other theorem environments, but none of \zref-clever built-in reference types is adequate for my needs.

In this case, we need to provide \zref-clever with settings pertaining to the custom reference type we’d like to use. Unless you need to typeset your cross-references in multiple languages, in which case you’d require \zcLanguageSetup, the most convenient way to setup a reference type is \zcRefTypeSetup. In most cases, what we really need to provide for a custom type are the “type names” and other reference format options.
can rely on default language options already provided by the package (assuming the language is supported).

How-to 6: \texttt{\textbackslash newtheorem}, custom type

\begin{verbatim}
\documentclass[article]
\usepackage[zref-clever]
\newtheorem{myconjecture}{Conjecture}[section]
\zcRefTypeSetup{myconjecture}{
  Name-sg = Conjecture ,
  name-sg = conjecture ,
  Name-pl = Conjectures ,
  name-pl = conjectures ,
}
\begin{document}
\section{Section 1}
\begin{myconjecture}
\zlabel{conjecture-1}
A conjecture.
\end{myconjecture}
\zcref{conjecture-1}
\end{document}
\end{verbatim}

11.3 \texttt{newfloat}

\textbf{Task} Setup a new float environment created with \texttt{newfloat} to be referred to with \texttt{zcref}.

None of \texttt{zref-clever} built-in reference types is adequate for my needs.

The case here is pretty much the same as that for \texttt{\textbackslash newtheorem} with a custom type. Hence, we need to setup a corresponding type, for which providing the “type names” should normally suffice. Note that, as far as \texttt{zref-clever} is concerned, there’s nothing specific to the \texttt{newfloat} package in the setup, the same procedure can be used with \texttt{memoir}'s \texttt{\textbackslash newfloat} command or with the \texttt{float}, \texttt{floatrow}, and \texttt{trivfloat} packages.

How-to 7: newfloat

\begin{verbatim}
\documentclass[article]
\usepackage[newfloat]
\DeclareFloatingEnvironment{diagram}
\usepackage[zref-clever]
\zcRefTypeSetup{diagram}{
  Name-sg = Diagram ,
  name-sg = diagram ,
  Name-pl = Diagrams ,
  name-pl = diagrams ,
}
\begin{document}
\section{Section 1}
\begin{diagram}
\zlabel{diagram-1}
A diagram.
\end{diagram}
\caption{A diagram}
\zlabel{diagram-1}
\end{diagram}
\end{verbatim}

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11.4 amsmath

Task Make references to amsmath display math environments with \zcref.

Given how amsmath’s display math environments work, they need to handle \label specially, and this support is quite hard-wired into the environments, but it is not extended to \zlabel. zref-clever’s amsmath compatibility module provides that a \label used inside these environments set both a regular \label and a \zlabel, so that we can refer to the equations with both referencing systems. Note the use of \zlabel for subequations though. For more details, see the description of the amsmath compatibility module at Section 13.

\begin{document}
\section{Section 1}

\begin{equation} \label{eq:1}
A^{(1)}_l = \begin{cases} n!,& \text{if } l =1 \\ 0,& \text{otherwise}. \end{cases}
\end{equation}

\begin{equation*} \tag{foo} \label{eq:2}
A^{(1)}_l = \begin{cases} n!,& \text{if } l =1 \\ 0,& \text{otherwise}. \end{cases}
\end{equation*}

\begin{subequations} \zlabel{eq:3}
\begin{align}
A+B &= B+A \\
C &= D+E \label{eq:3b} \\
E &= F
\end{align}
\end{subequations}

\zcref{eq:1, eq:2, eq:3, eq:3b}
\end{document}

11.5 listings

Task Make references to a lstlisting environment from the listings package with \zcref.

Being lstlisting a verbatim environment, setting labels inside it requires special treatment. zref-clever’s listings compatibility module provides that a label given to the label option gets set with both a regular \label and a \zlabel, so that we can refer to it with both referencing systems. Setting labels for specific lines of the environment can
be done with \zlabel directly, subject to the same escaping as for the standard \label. For more details, see the description of the listings compatibility module at Section 13.

How-to 9: listings

\documentclass{article}
\usepackage{listings}
\usepackage{zref-clever}
\usepackage{hyperref}
\begin{document}
\section{Section 1}
\lstset{escapeinside={(*@}{@*)}, numbers=left, numberstyle=\tiny}
\begin{lstlisting}[caption={Useless code}, label=lst:1]
for i:=maxint to 0 do
begin
\{ do nothing \}(\textit{\zlabel{ln:1.1}})
end;
\end{lstlisting}
\zcref{lst:1, ln:1.1}
\end{document}

11.6 \textit{enumitem}

\textbf{Task} Setup a custom enumerate environment created with \textit{enumitem} to be referred to with \textit{\zcref}.

Since the \textit{enumerate} environment’s counters are reset at each nesting level, but not with the standard machinery, we have to inform \textit{zref-clever} of this resetting behavior with the \texttt{counterresetby} option. Also, given the naming of the underlying counters is tied with the environment’s name and the level’s number, we cannot really rely on an implicit counter-type association, and have to set it explicitly with the \texttt{countertype} option.

How-to 10: \textit{enumitem}

\documentclass{article}
\usepackage{zref-clever}
\zcsetup{
  countertype = {
    myenumeratei = item ,
    myenumerateii = item ,
    myenumerateiii = item ,
    myenumerateiv = item ,
  },
  counterresetby = {
    myenumerateii = myenumeratei ,
    myenumerateiii = myenumerateii ,
    myenumerateiv = myenumerateiii ,
  }
}
\usepackage{enumitem}
\newlist{myenumerate}{enumerate}{4}
11.7 \texttt{zref-xr}

\textbf{Task} Make references to labels set in an external document with \texttt{zcref}.

\texttt{zref} itself offers this functionality with module \texttt{zref-xr}, and \texttt{zref-clever} is prepared to make use of it. Just a couple of details have to be taken care of, for it to work as intended: i) \texttt{zref-clever} must be loaded in both the main document and the external document, so that the imported labels also contain the properties required by \texttt{zref-clever}; ii) since \texttt{zexternaldocument} defines any properties it finds in the labels from the external document when it imports them, it must be called after \texttt{zref-clever} is loaded, otherwise the later will find its own internal properties already defined when it does get loaded, and will justifiably complain. Note as well that the starred version of \texttt{zexternaldocument*}, which imports the standard labels from the external document, is not sufficient for \texttt{zref-clever}, since the imported labels will not contain all the required properties.

Assuming here \texttt{documentA.tex} as the main file and \texttt{documentB.tex} as the external one, and also assuming we just want to refer in “A” to the labels from “B”, and not the contrary, a minimum setup would be the following.

\textbf{How-to 11: \texttt{zref-xr}}

\texttt{documentA.tex:}

\begin{verbatim}
\documentclass{article}
\usepackage{zref-clever}
\usepackage{zref-xr}
\zexternaldocument[B-]{documentB}
\usepackage{hyperref}
\begin{document}
\section{Section A1}
\zlabel{sec:section-a1}
\end{document}
\end{verbatim}
12 Limitations

Being based on \texttt{zref} entails one quite sizable advantage for \texttt{zref-clever}: the extensible referencing system of the former allows \texttt{zref-clever} to store and retrieve the information it needs to work without having to redefine some core \LaTeX\ commands. This alone makes for reduced compatibility problems and less load order issues than the average package in this functionality area. On the other hand, being based on \texttt{zref} also does impair the supported scope of \texttt{zref-clever}. Not because of any particular limitation of either, but because any class or package which implements some special handling for reference labels universally does so aiming at the standard referencing system, and whether specific support for \texttt{zref} is included, or whether things work by spillover of the particular technique employed, is not guaranteed.

The limitation here is less one of \texttt{zref-clever} than that of a potential lack of support for \texttt{zref} itself. Broadly speaking, what \texttt{zref-clever} does is set up \texttt{zref} so that its \texttt{\zref@newlabel}s contains the information we need using \texttt{zref}'s API. Once the \texttt{\zlabel} is set correctly, there is little in the way of \texttt{zref-clever}, it can just extract the label's information, again using \texttt{zref}'s API, and do its job. Therefore, the problems that may arise are really in label setting.

For \texttt{\zlabel} to be able to set a label with everything \texttt{zref-clever} needs, some conditions must be fulfilled, most of which are pretty much the same as that of a regular label, but not only. As far as my experience goes, the following label setting requirements can be potentially problematic and are not necessarily granted for \texttt{\zlabel}:

1. One must be able to call \texttt{\zlabel}, directly or indirectly, at the appropriate scope/location so as to set the label.

2. When \texttt{\zlabel} is set, it must see a correct value of \texttt{\@currentcounter}.

As to the first, it is not everywhere we technically can set a (z)label. On verbatim-like environments it depends on how they are defined and whether they provide a proper place or option to do so. But other places may be problematic too, for example, \texttt{amsmath} display math environments also handle \texttt{\label} specially and the same work is not done for \texttt{\zlabel}.

Regarding the second, a correctly set \texttt{\@currentcounter} is critical for the task of \texttt{zref-clever}: the reference type will depend on that and, consequently, sorting and compression as well, counter resetting behavior information is also retrieved based
on it, and so on. Since the 2020-10-01 \LaTeX{} release, \texttt{\@currentcounter} is set by \texttt{\refstepcounter} alongside \texttt{\@currentlabel} and, since the 2021-11-15 release, the support for \texttt{\@currentcounter} has been further extended in the kernel. Hence, as long as kernel features are involved, or as long as \texttt{\refstepcounter} is the tool used for the purpose of reference setting, \texttt{\zlabel} will tend to have all information within its grasp at label setting time. But that’s not always the case. For this reason, \texttt{zref-clever} has the option \texttt{currentcounter} which at least allows for some viable work-arounds when the value of \texttt{\@currentcounter} cannot be relied upon. Whether we have a proper opening to set it, depends on the case. Still, \texttt{\refstepcounter} is ubiquitous enough a tool that we can count on \texttt{\@currentcounter} most of the time.

All in all, most things work, but some things don’t. And if the later will eventually work depends essentially on whether support for \texttt{zref} is provided by the relevant packages and classes or not. Or, failing that, whether \texttt{zref-clever} is able to provide some specific support when a reasonable way to do so is within reach.

## 13 Compatibility modules

This section gives a description of each compatibility module provided by \texttt{zref-clever}. These modules intend to smooth the interaction of \LaTeX{} features, document classes, and packages with \texttt{zref-clever} and \texttt{zref}, and they can be selectively or completely disabled with the option \texttt{nocompat} (see Section 7). This set is not to be confused with “the list of packages or classes supported by \texttt{zref-clever}”. In most circumstances, things should just work out of the box, and need no specific handling. These are just the ones for which some special treatment was required. Of course, this effort is bound to be incomplete (see Section 12).

The purpose of outlining to some extend what the compatibility modules do is twofold. First, some of them require usage adjustments for label setting, which must be somehow conveyed in this documentation. Second, the kind and degree of intervention in external code varies significantly for each module, and since this is an area of potential friction, a minimum of information for the users to judge whether they want to leave these modules enabled or not is due. For this reason, this is also a little technical, but for full details, see the code documentation.

### appendix

The \texttt{\appendix} command provided by many document classes is normally used to change the behavior of the sectioning commands after that point. Usually, depending on the class, the changes that interest us involve using \texttt{\@Alph} for numbering and \texttt{\appendixname} for chapter’s names. In sum, we’d like to refer to the appendix sectioning commands as “appendices” rather than “chapters” or “sections”. Since the sectioning commands are the same as before \texttt{\appendix}, and so are their underlying counters, we must configure the counter type of the sectioning counters to \texttt{appendix}. And this is what this compatibility module does, and it uses a \texttt{\itemize} hook on \texttt{\appendix} for the purpose. Hence, this module applies to any document class or package which provides that command.

### appendices

This module implements support for the appendices and subappendices environments provided by the \texttt{appendix} package, and also by \texttt{memoir}. The task is the same as for the \texttt{appendix} module: set proper counter types for the sectioning counters. This module
employs environment hooks to appendices and subappendices and a command hook to \appendix for the purpose.

The \texttt{memoir} class implements several features with one or another implication for cross-referencing, usually bearing just the standard referencing system in mind, and related mainly to captions, subfloats, and notes. This compatibility module tries to adjust \texttt{zref-clever} to these features with support for the following: i) set counter types for counters subfigure, subtable, and \texttt{poemline} (used in the verse environment); ii) configure resetting behavior (\texttt{counterresetby} option) for subfigure and subtable counters; iii) provide that the \texttt{(label)} arguments to environments sidecaption and sideconntcaption and commands \texttt{\bitwonumcaption}, \texttt{\bionenumcaption}, and \texttt{\bicaption also set a \zlabel of the same name}; iv) provide the \texttt{zref} property "\texttt{subcaption}" so that we can refer to, for example, \texttt{\zcref[ref=subcaption]{subcap-1}} to emulate the functionality of \texttt{memoir}'s \texttt{\subcaptionref}; v) provide that \texttt{\footnote}, \texttt{\verbfootnote}, \texttt{\sidefootnote}, and \texttt{\pagenote} get a proper \texttt{currentcounter} set; and v) set counter types for counters sidefootnote and \texttt{pagenote}. Naturally, the sheer number of features that required some specific support implies that some gymnastics were needed here. But the most sensitive changes are: i) a local redefinition of \texttt{\label} inside the environments sidecaption and sideconntcaption and the commands \texttt{\bitwonumcaption}, \texttt{\bionenumcaption}, and \texttt{\bicaption}; and ii) the use of \texttt{\itemize} hooks command hooks on \texttt{\bitwonumcaption}, \texttt{\bionenumcaption}, \texttt{\bicaption}, \texttt{\@memsubcaption}, \texttt{\@makefntext}, and \texttt{\@makesidefntext}.

The \texttt{KOMA-Script} document classes are much more strict than \texttt{memoir} in using standard mechanisms for cross-reference related features, so that very little adjustment is needed here. Only the environments \texttt{captionbeside} and \texttt{captionofbeside} require special treatment. And, though they do use \texttt{\refstepcounter} under the hood, since they are environments, we don't get to see reference variables outside them. \texttt{\@currentlabel} is smuggled out of the group, but not \texttt{\@currentcounter}, so we must arrange for the later to have a correct value outside the caption environments too. Environment hooks are used for the purpose, essentially setting \texttt{\@currentcounter} to \texttt{\@captype}, which would be the value the captioning infrastructure would set for it.

\texttt{amsmath}'s display math environments have their contents processed twice, once for measuring and the second does the final typesetting. Hence, \texttt{amsmath} needs to handle \texttt{\label} specially inside these environments, otherwise we'd have duplicate labels all around, and indeed it does redefine \texttt{\label} locally inside them. Alas, the same treatment is not granted to \texttt{\zlabel}. However, \texttt{\label} is set basically to store the value of the argument inside the environments, and its global meaning is kept in \texttt{\ltx@label} which is called at the appropriate time to actually set the label. So, what \texttt{zref-clever} does is redefine \texttt{\ltx@label} to set both a regular \texttt{\label} and a \texttt{\zlabel} for the same \texttt{(label)} (which does not generate a duplicate label problem since the referencing systems are independent). Therefore, you must use \texttt{\label} (not \texttt{\zlabel}) inside \texttt{amsmath}'s display math environments, and this compatibility module arranges that you can also refer to that label with \texttt{zref} and, thus, with \texttt{\zcref} as well. The following environments are subject to this usage restriction: equation, align, alignat, \texttt{flalign}, \texttt{xalignat}, gather, \texttt{multline}, and their respective starred versions. In particular, the same is not the case for the \texttt{subequations} environment, inside which \texttt{\zlabel} works as usual (to refer to the main equation number, that is, right after \texttt{\begin{subequations}}). See the \texttt{How-to 8} for an usage example. The module also ensures proper \texttt{currentcounter} values are in
place for the display math environments, for which it uses environment hooks, and sets the font of equation references to \upshape, following amsmath’s \eqref. Finally, the module also provides a subeq property, for display math environments used inside the subequations environment, which can be used to refer to them directly with the ref option, or to build terse ranges with the endrange option. Note that zref-clever is not the only package to redefine \ltx@label, and compatibility problems may arise if this module is used with such packages or with document classes that do the same. In case of trouble, you can load zref-clever with option nocompat=amsmath and either use the standard referencing system’s facilities to refer to amsmath’s equations or check the code documentation for the technique used for this (which is pretty standard) and adapt it to your case. Given that any trouble that may arise here is one of the proper “timing” of the redefinition, it should not be particularly complicated to make such adjustments.

mathtools mathtools has a feature to show the numbers only for those equations actually referenced (with \eqref or \refeq), which is enabled by the showonlyrefs option. This compatibility module adds support for this feature, such that equation references made with \zcref also get marked as “referenced” for mathtools, when the option is active, of course. The module uses a couple of mathtools functions, but does not need to redefine or hook into anything, everything is handled on zref-clever’s side.

breqn This compatibility module only sets proper currentcounter values for the environments dgroup, dmath, dseries, and darray, and uses environment hooks for the purpose. Note that these environments offer a label option for label setting, but implements it in a way that is somewhat tricky to grab for our purposes, so we don’t do it. However, breqn’s documentation says the following about the use of \label inside its environments: “Use of the normal \label command instead of the label option works, I think, most of the time (untested)”. My light testing suggests the same is true for \zlabel, which can then be used directly in these environments. But the “second class” status for this use is the one granted by breqn, there’s not much we can do here. If you have any trouble with this, you may wish to check Work-around 1.

listings Being lstlisting environments what they are, one cannot simply place a label inside them without special treatment. listings arranges this to by providing a label option for setting a label for the whole environment, and a properly escaped label command inside the environment can be used to refer to the line number. While the later can also be used to set a \zlabel to make line number references, the label option is catered to the standard labels exclusively. Hence, this compatibility module uses the same label name – which luckily and atypically is stored in a variable – and sets a \zlabel as well. This is done by using listings’ PreInit hook, so we don’t have to redefine or tamper with anything for the purpose. Besides this, the module also sets appropriate countertype, counterresetby and currentcounter values for the listings’ counters: lstlisting and lstnumber. See the How-to 9 for an usage example.

enumitem \LaTeX’s enumerate environment requires some special treatment from zref-clever, since its resetting behavior is not stored in the standard way, and the counters’ names, given they are numbered by level, do not map to the reference type naturally. This is done by default for the up to four levels of nested enumerate environments the kernel offers. enumitem, though, allows one to increase this maximum list depth for enumerate and, if this is done, setup for these deeper nesting levels have also to be taken care of, and that’s what this compatibility module does. All settings here are internal to zref-clever, no hooks or redefinitions are needed, we just check the existing pertinent
counters at \begindocument, and supply settings for them. Of course, this means that only \enumerate’s settings done in the preamble will be visible to the module and provided for.

This compatibility module sets appropriate countertype and counterresetby for the subfigure and subtable counters, and provides the \zref property “\subref” so that we can refer to, for example, \zcref[ref=\subref]{⟨label⟩} to emulate the functionality of subcaption’s \subref. The later feature uses the \caption@subtypehook provided by caption to locally add the \subref property to \zref’s main property list.

This module just sets appropriate countertype and counterresetby for the subfigure and subtable counters.

14 Work-arounds

As should be clear by now, the use of \zref’s \zlabel and thus of \zref-clever may occasionally require some adjustments, since it does not enjoy the universal support the standard referencing system does. The compatibility modules presented in Section 13 go a long way in ensuring the user has to worry very little about it, but they cannot be expected to go all the way. Not only because this kind of support will never be exhaustive, but also since, sometimes, given the way certain features are implemented by packages or document classes, there may not be a reasonable way to provide this support, from our side. But, still, most of the time, it is still “viable” to get there, if one really wishes to do so. So, this section keeps track of some known recipes, which I don’t think belong in \zref-clever itself, but which you may choose to use. Note that this list is intended to spare users from having to reinvent the wheel every time someone needs something of the sort, but from \zref-clever’s perspective, their status is “not supported”.

breqn

As mentioned in breqn’s compatibility module (Section 13), breqn’s math environments \dgroup, \dmath, \dseries, and \darray offer a label option (plus labelprefix) for the purpose of label setting. Setting a \zlabel alongside with a regular \label based on that option requires redefining some of breqn internals. Also, breqn does not use \refstepcounter to increment the equation counters and, as a result, fails to set \hyperref anchors for the equations (thus affecting standard labels too). The example below also provides to that.\footnote{The later work-around thanks to Heiko Oberdiek, at https://tex.stackexchange.com/a/241150.}

Work-around 1: breqn

\documentclass{article}
\usepackage{zref-clever}
\usepackage{breqn}
\makeatletter
\definekey{breqn}{label}{%\edef\next@label{\noexpand\label{\next@label@pre#1}}%\noexpand\zlabel{\next@label@pre#1}%;\let\next@label@pre@empty}

\begin{document}
\end{document}
\makeatletter
\usepackage{hyperref}
\usepackage{etoolbox}
\makeatletter
\patchcmd{\eq@setnumber}{{\stepcounter}{\refstepcounter}}{}{{}\errmessage{Patching \noexpand\eq@setnumber failed}}
\makeatother
\begin{document}
\section{Section 1}
\begin{dmath}[label={eq:1}]
f(x)=\frac{1}{x} \text{condition for } x\neq 0\end{dmath}
\begin{dmath}[labelprefix={eq:},label={2}]
H_2^2 = x_1^2 + x_1 x_2 + x_2^2 - q_1 - q_2\end{dmath}
\zcref{eq:1, eq:2}
\end{document}

Of course, you can always adapt things to your needs and, e.g., make the \texttt{label} option set just \texttt{\_{label}} instead of both labels, or create a separate \texttt{\_\_{label}} option.

\section{15 Acknowledgments}

\texttt{zref-clever} would not be possible without other people’s previous work and help.

Heiko Oberdiek’s \texttt{zref}, now maintained by the Oberdiek Package Support Group, is the underlying infrastructure of this package. The potential of its basic concept and the solid implementation were certainly among the reasons I’ve chosen to venture into these waters, to start with. And I believe they will remain one of the main assets of \texttt{zref-clever} as it matures.

The name of the package makes no secret that a major inspiration for the kind of “feel” I strove to achieve has been Toby Cubitt’s \texttt{cleveref}. Indeed, I have been an user of \texttt{cleveref} for several years, and a happy one at that. But the role \texttt{cleveref} played in the development of \texttt{zref-clever} extends beyond the visible influence in the design of user facing functionality. Some technical solutions and, specially, the handling of support for other packages were a valuable reference. Hence, the accumulated experience of \texttt{cleveref} allowed for \texttt{zref-clever} to start on a more solid foundation than would otherwise be the case.

The long term efforts of the \texttt{\LaTeX\_Team} around \texttt{expl3} and \texttt{xparse} have also left their marks in this package. By implementing powerful tools and smoothing several regular programming tasks, they have certainly reduced my entry barrier to \texttt{\LaTeX} programming and enabled me to develop this package with a significantly reduced effort. And, given the constraints of my abilities, the result is no doubt much better than it would be in their absence.

Besides these more general acknowledgments, a number of people have contributed to \texttt{zref-clever}, whether they are aware of it or not. Suggestions, ideas, solutions to problems, bug reports or even encouragement were generously provided by (in chronological order): Ulrike Fischer, Phelype Oleinik, Enrico Gregorio, Steven B. Segletes, Jonathan P. Spratte, David Carlisle, Frank Mittelbach, ’samcarter’, Alan Munn, Florent Rougon, Denis Bitouzé, Marcel Krüger, Jürgen Spitzmüller, and ’niluxv’.

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The package’s language files have been provided or improved thanks to: Denis Bitouzé (French), François Lagarde (French), and ‘niluxv’ (Dutch).

If I have inadvertently left anyone off the list I apologize, and please let me know, so that I can correct the oversight.

Thank you all very much!

16 Change history

A change log with relevant changes for each version, eventual upgrade instructions, and upcoming changes, is maintained in the package’s repository, at https://github.com/gusbrs/zref-clever/blob/main/CHANGELOG.md. The change log is also distributed with the package’s documentation through CTAN upon release so, most likely, texdoc zref-clever/changelog should provide easy local access to it. An archive of historical versions of the package is also kept at https://github.com/gusbrs/zref-clever/releases.