Upgrading from the glossary package to the glossaries package

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Abstract

The purpose of this document is to provide advice if you want to convert a LaTeX document from using the obsolete glossary package to the replacement glossaries package.

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1 Why the Need for a New Package?

The glossary package started out as an example in a tutorial, but I decided that I may as well package it up and upload it to CTAN. Unfortunately it was fairly rigid and unable to adapt well to the wide variation in glossary styles. Users began making requests for enhancements, but with each enhancement the code became more complicated and bugs crept in. Each fix in one place seemed to cause another problem elsewhere. In the end, it was taking up too much of my time to maintain, so I decided to replace it with a much better designed package. With the new glossaries package:

- you can define irregular plurals;
- glossary terms can have an associated symbol in addition to the name and description;
- new glossary styles are much easier to design;
- you can add dictionaries to supply translations for the fixed names used in headings and by some of the glossary styles;
- you can choose\(^1\) between using `makeindex` or `xindy` to sort the glossary. Using `xindy` means that:
  - there is much better support for terms containing accented or non-Latin characters;
  - there is support for non-standard location numbers;
- you don’t need to remember to escape `makeindex`’s special characters as this is done internally;
- hierarchical entries and homographs are supported;\(^2\)
- there is better support for cross-referencing glossary entries;
- acronyms are just another glossary term which helps to maintain consistency;
- different acronym styles are supported.

\(^1\)as from v1.17. Previous versions were designed to be used with `makeindex` only

\(^2\)as from v1.17
2 Package Options

When converting a document that currently uses the obsolete glossary package to the replacement glossaries package, it should be fairly obvious that the first thing you need to do is replace `\usepackage{glossary}` with `\usepackage{glossaries}`, however some of the package options are different, so you may need to change those as well. Table 1 shows the mappings from the glossary to the glossaries package options.

Table 1: Mappings from glossary to glossaries package options

<table>
<thead>
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<th>glossary option</th>
<th>glossaries option</th>
</tr>
</thead>
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<td>style=list</td>
</tr>
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</tr>
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</tr>
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</tr>
<tr>
<td>style=long,header=plain,border=none,cols=3</td>
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<td></td>
<td>no corresponding option</td>
</tr>
<tr>
<td></td>
<td>no corresponding option</td>
</tr>
</tbody>
</table>
3 Defining new glossary types

If you have created new glossary types, you will need to replace all instances of

\newglossarytype{⟨log-ext⟩}{⟨type⟩}{⟨out-ext⟩}{⟨in-ext⟩}{⟨old style list⟩}
\newcommand{⟨type⟩}{⟨name⟩}{⟨title⟩}

with

\newglossary{⟨log-ext⟩}{⟨type⟩}{⟨out-ext⟩}{⟨in-ext⟩}{⟨title⟩}

in the preamble, and, if the new glossary requires a different style to the main (default) glossary, you will also need to put

\glossarystyle{⟨new style⟩}

immediately before the glossary is displayed, or you can specify the style when you display the glossary using \printglossary (see below).

The ⟨old style list⟩ optional argument can be converted to ⟨new style⟩ using the same mapping given in Table 1.

For example, if your document contains the following:

\newglossarytype{nlg}{notation}{not}{ntn}{style=long,header}
\newcommand{notationname}{Index of Notation}

You will need to replace the above two lines with:

\newglossary{nlg}{notation}{not}{ntn}{Index of Notation}
\glossarystyle{longheader}

in the preamble and

\glossarystyle{longheader}

immediately prior to displaying this glossary. Alternatively, you can specify the style using the style key in the optional argument of \printglossary. For example:

\printglossary[type=notation,style=longheader]

Note that the glossary title is no longer specified using \glossaryname (except for \glossaryname and \acronymname) but is instead specified in the ⟨title⟩ argument of \newglossary. The short title which is specified in the glossary package by the command \short{⟨glossary-name⟩} name is now specified using the toctitle key in the optional argument to \printglossary.
4 \texttt{make(glossary name)}

All instances of \texttt{make(glossary name)} (e.g. \texttt{makerglossary} and \texttt{makeacronym}) should be replaced by the single command \texttt{makeglossaries}. For example, if your document contained the following:

\begin{verbatim}
\makerglossary
\makeacronym
\end{verbatim}

then you should replace both lines with the single line:

\begin{verbatim}
\makeglossaries
\end{verbatim}

5 Storing glossary information

With the old \texttt{glossary} package you could optionally store glossary information for later use, or you could simply use \texttt{glossary} whenever you wanted to add information to the glossary. With the new \texttt{glossaries} package, the latter option is no longer available.\footnote{mainly because having a key value list in \texttt{glossary} caused problems, but it also helps consistency.} If you have stored all the glossary information using \texttt{storeglosentry}, then you will need to convert these commands into the equivalent \texttt{newglossaryentry}. If you have only used \texttt{glossary}, then see Section 6.4.

Substitute all instances of

\begin{verbatim}
\storeglosentry{⟨label⟩}{⟨gls-entry⟩}
glossary
\end{verbatim}

with

\begin{verbatim}
\newglossaryentry{⟨label⟩}{⟨gls-entry⟩}
glossaries
\end{verbatim}

This should be fairly easy to do using the search and replace facility in your editor (but see notes below).

If you have used the optional argument of \texttt{storeglosentry} (i.e. you have multiple glossaries) then you will need to substitute

\begin{verbatim}
\storeglosentry[⟨gls-type⟩]{⟨label⟩}{⟨gls-entry⟩}
glossary
\end{verbatim}

with

\begin{verbatim}
\newglossaryentry[⟨gls-type⟩]{⟨label⟩}{⟨gls-entry⟩}
glossaries
\end{verbatim}
\newglossaryentry{⟨label⟩}{⟨gls-entry⟩,type=⟨gls-type⟩}

The glossary entry information ⟨gls-entry⟩ may also need changing. If ⟨gls-entry⟩ contains any of makeindex’s special characters (i.e. @ ! " or \) then they should no longer be escaped with " since the glossaries package deals with these characters internally. For example, if your document contains the following:

\storeglosentry{card}{name={"|$\mathcal{S}$"}},
description={The cardinality of the set $\mathcal{S}$}

then you will need to replace it with:

\newglossaryentry{card}{name={$\mathcal{S}$},
description={The cardinality of the set $\mathcal{S}$}}

The format and number keys available in \storeglosentry are not available with \newglossaryentry.

6 Adding an entry to the glossary

The glossary package provided two basic means to add information to the glossary: firstly, the term was defined using \storeglosentry and the entries for that term were added using \useglosentry, \useGlosentry and \gls. Secondly, the term was added to the glossary using \glossary. This second approach is unavailable with the glossaries package.

6.1 \useglosentry

The glossary package allows you to add information to the glossary for a predefined term without producing any text in the document using

\useglosentry{⟨old options⟩}{⟨label⟩}

Any occurrences of this command will need to be replaced with

\glsadd{⟨new options⟩}{⟨label⟩}

The format key in ⟨old options⟩ remains the same in ⟨new options⟩. However the number=⟨counter name⟩ key in ⟨old options⟩ should be replaced with counter=⟨counter name⟩ in ⟨new options⟩.
6.2 \useGlosentry

The glossary package allows you to add information to the glossary for a predefined term with the given text using

\useGlosentry[(old options)]{(label)}{(text)}

Any occurrences of this command will need to be replaced with

\glslink[(new options)]{(label)}{(text)}

The mapping from \texttt{\langle old options \rangle} to \texttt{\langle new options \rangle} is the same as that given Section 6.1.

6.3 \gls

Both the glossary and the glossaries packages define the command \gls. In this case, the only thing you need to change is the number key in the optional argument to counter. Note that the new form of \gls also takes a final optional argument which can be used to insert text into the automatically generated text.

6.4 \glossary

When using the glossaries package, you should not use \glossary directly.\footnote{This is because \glossary requires the argument to be in a specific format and doesn’t use the \texttt{\langle key\rangle}=$\langle$\texttt{value}$\rangle$ format that the old glossary package used. The new package’s internal commands set this format, as well as escaping any of makeindex’s or xindy’s special characters. What’s more, the format has changed as from v1.17 to allow the new package to be used with either makeindex or xindy.} If, with the old package, you have opted to explicitly use \glossary instead of storing the glossary information with \storeglosentry, then converting from glossary to glossaries will be more time-consuming, although in the end, I hope you will see the benefits.\footnote{From the user’s point of view, using \glossary throughout the document is time consuming, and if you use it more than once for the same term, there’s a chance extra spaces may creep in which will cause makeindex to treat the two entries as different terms, even though they look the same in the document.} If you have used \glossary with the old glossary package, you will instead need to define the relevant glossary terms using \newglossaryentry and reference the terms using \glsadd, \glslink, \gls etc.

If you don’t like the idea of continually scrolling back to the preamble to type all your \newglossaryentry commands, you may prefer to create
a new file, in which to store all these commands, and then input that file in your document’s preamble. Most text editors and front-ends allow you to have multiple files open, and you can tab back and forth between them.

7 Acronyms

In the glossary package, acronyms were treated differently to glossary entries. This resulted in inconsistencies and sprawling unmaintainable code. The new glossaries package treats acronyms in exactly the same way as normal glossary terms. In fact, in the glossaries package, the default definition of:

\newacronym[⟨options⟩]{⟨label⟩}{⟨abbrv⟩}{⟨long⟩}

is a shortcut for:

\newglossaryentry{⟨label⟩}{type=acronymtype,
name={⟨abbrv⟩},
description={⟨long⟩},
text={⟨abbrv⟩},
first=⟨long⟩(⟨abbrv⟩),
plural={⟨abbrv⟩s},
firstplural=⟨long⟩s(⟨abbrv⟩s),⟨options⟩}

This is different to the glossary package which set the name key to ⟨long⟩ (⟨abbrv⟩) and allowed you to set a description using the description key. If you still want to do this, you can use the description package option, and use the description key in the optional argument of \newacronym. For example, if your document originally had the following:

\newacronym{SVM}{Support Vector Machine}{description=Statistical pattern recognition technique}

Then you would need to load the glossaries package using the description package option, for example:

\usepackage[description]{glossaries}

and change the acronym definition to:

\newacronym[description=Statistical pattern recognition technique]{svm}{SVM}{Support Vector Machine}
You can then reference the acronym using any of the new referencing commands, such as \gls or \glsadd.

With the old glossary package, when you defined an acronym, it also defined a command \acrname which could be used to display the acronym in the text. So the above SVM example would create the command \SVM with the old package. In the new glossaries package, the acronyms are just another type of glossary entry, so they are displayed using \gls{\langle label\rangle}. Therefore, in the above example, you will also need to replace all occurrences of \SVM with \gls{svm}.

If you have used \useacronym instead of \acrname, then you will need to replace all occurrences of

\begin{verbatim}
\useacronym{\langle insert\rangle}{\langle acr-name\rangle}
\end{verbatim}

with

\begin{verbatim}
\gls{\langle label\rangle}{\langle insert\rangle}
\end{verbatim}

Note that the starred versions of \useacronym and \acrname (which make the first letter uppercase) should be replaced with \Gls{\langle label\rangle}.

Alternatively (as from v1.18 of the glossaries package), you can use \oldacronym which uses the same syntax as the old glossary package’s \newacronym and also defines \acrname. For example, if your document originally had the following:

\begin{verbatim}
\newacronym{SVM}{Support Vector Machine}{description=Statistical pattern recognition technique}
\end{verbatim}

then you can change this to:

\begin{verbatim}
\oldacronym{SVM}{Support Vector Machine}{description=Statistical pattern recognition technique}
\end{verbatim}

You can then continue to use \SVM. However, remember that \LaTeX generally ignores spaces after command names that consist of alphabetical characters. You will therefore need to force a space after \acrname, unless you also load the xspace package. (See Section 13 of the glossaries documentation for further details.) Note that \oldacronym uses its first argument to define the acronym’s label (as used by commands like \gls), so in the above example, with the new glossaries package, \SVM becomes a
shortcut for \gls{SVM} and \SVM* becomes a shortcut for \Gls{SVM}.

7.1 \acrln and \acrsh

In the glossary package, it is possible to produce the long and short forms of an acronym without adding an entry to the glossary using \acrln and \acrsh. With the glossaries package (provided you defined the acronym using \newacronym or \oldacronym and provided you haven’t redefined \newacronym) you can replace

\acs{acr-name}

with

\acrshort{⟨label⟩}

and you can replace

\acrln{acr-name}

with

\acrlong{⟨label⟩}

The glossaries package also provides the related commands \acrshortpl (plural short form) and \acrlongpl (plural long form) as well as upper case variations. If you use the glossaries “shortcuts” package option, you can use \acs in place of \acrshort and \acl in place of \acrlong.

See Section 13 of the glossaries manual for further details of how to use these commands.

7.2 \ifacronymfirstuse

The glossary package command

\ifacronymfirstuse{⟨acr-name⟩}{⟨text1⟩}{⟨text2⟩}

can be replaced by the glossaries command:
Note that \ifglsused evaluates the opposite condition to that of \ifacronymfirstuse which is why the last two arguments have been reversed.

### 7.3 \resetacronym and \unsetacronym

The glossary package allows you to reset and unset the acronym flag which is used to determine whether the acronym has been used in the document. The \glossaries package also provides a means to do this on either a local or a global level. To reset an acronym, you will need to replace:

```latex
\resetacronym\{\acr-name\}
```

with either

```latex
\glsreset\{\label\}
```

or

```latex
\glslocalreset\{\label\}
```

To unset an acronym, you will need to replace:

```latex
\unsetacronym\{\acr-name\}
```

with either

```latex
\glsunset\{\label\}
```

or

```latex
\glslocalunset\{\label\}
```

To reset all acronyms, you will need to replace:
8 Displaying the glossary

The glossary package provides the command \printglossary (or \print\langle type\rangle for other glossary types) which can be used to print individual glossaries. The glossaries package provides the command \printglossaries which will print all the glossaries which have been defined, or \printglossary\[\langle options\rangle\] to print individual glossaries. So if you just have \printglossary, then you can leave it as it is, but if you have, say:

\printglossary
\printglossary[acronym]

or

\printglossary
\printacronym
then you will need to replace this with either

\printglossaries

or

\printglossary
\printglossary[type=\acronymtype]

The glossary package allows you to specify a short title (for the table of contents and page header) by defining a command of the form \short⟨glossary-type⟩name. The glossaries package doesn’t do this, but instead provides the toctitle key which can be used in the optional argument to \printglossary. For example, if you have created a new glossary type called notation, and you had defined

\newcommand{\shortnotationname}{Notation}

then you would need to use the toctitle key:

\printglossary[type=notation,toctitle=Notation]

The glossaries package will ignore \shortnotationname, so unless you have used it elsewhere in the document, you may as well remove the definition.

9 Processing Your Document

If you convert your document from using the glossary package to the glossaries package, you will need to delete any of the additional files, such as the .glo file, that were created by the glossary package, as the glossaries package uses a different format. Remember also, that if you used the makeglos Perl script, you will need to use the makeglossaries Perl script instead. As from v1.17, the glossaries package can be used with either makeindex or xindy. Since xindy was designed to be multilingual, the new glossaries package is a much better option for non-English documents.

For further information on using makeglossaries, makeindex or xindy to create your glossaries, see Section 1.4 of the glossaries documentation.

10 Troubleshooting

Please check the FAQ\(^6\) for the glossaries package if you have any problems.

\(^6\)http://www.dickimaw-books.com/faqs/glossariesfaq.html
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