

Pacific Journal of Mathematics

ON JACOBI FUNCTIONS

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The Jacobi functions¹ R_m are usually defined by

$$(1) \quad R_m = R_m^{(k)}(\alpha) = \sum_{s=1}^{p-2} \alpha^{\text{ind } s - (m+1)\text{ind } (s+1)}$$

where $\alpha = e^{2\pi i/k}$ and $\text{ind } s = \text{ind}_g s$ is taken with respect to some primitive root g of a prime $p = kn + 1$. Therefore R_m depends in general on the choice of primitive root and all the explicit results which have been given for special cases, as in [1], [2], [7] and others contain ambiguities of sign due to this indeterminacy. In a recent work on power character matrices [4] it became necessary to make the known results more explicit and to obtain some new ones. It is the purpose of this note to give explicit results in case 2 is not a k th power residue of p for $k = 3, 4, 5$ and 6 and for all m . The case in which 2 is a k th power residue of p still remains ambiguous.

We find it more convenient to use the character notation

$$(2) \quad \chi(h) = \chi_k(h) = \begin{cases} \alpha^{\text{ind } h} & \text{if } (h, p) = 1 \\ 0 & \text{otherwise} \end{cases}$$

in order to make use of all the multiplicative properties of the characters. In this notation R_m becomes

$$(3) \quad R_m = \sum_{s=1}^{p-2} \chi(s)[\chi(s+1)]^{-m-1}.$$

The following relations are well-known and can be easily derived from the definition as in [4].

$$(4) \quad R_m = \chi(-1)R_{k-1-m} = \chi(-1) \sum_{s=1}^{p-2} \chi(s)\chi^m(s+1)$$

$$(5) \quad R_{k-1} = -\chi(-1) = (-1)^{n+1}.$$

We shall need three other relations which we proceed to prove.

LEMMA 1. *If k is odd, then*

$$(6) \quad R_\lambda(\alpha) = R_1(\alpha^\lambda) \text{ for } k = 2\lambda + 1$$

Proof. Let $s\bar{s} \equiv 1 \pmod{p}$. Then

¹ Received November 17, 1959. The notation R_m is used here as in [2] instead of Jacobi's original ψ as in [1] and [4] to avoid conflict with Jacobsthal's ψ .

$$\begin{aligned} R_\lambda(\alpha) &= \sum_{s=1}^{p-2} \chi(s)\chi^\lambda(s+1) = \sum_{s=1}^{p-2} \chi^{k-1}(\bar{s})\chi^\lambda(s+1) \\ &= \sum_{s=1}^{p-2} \chi^\lambda(\bar{s})\chi^\lambda(\bar{s}+1) = R_1(\alpha^\lambda). \end{aligned}$$

LEMMA 2. If k is even, then

$$(7) \quad R_\mu = \chi(4)R_1, \text{ where } k = 2\mu.$$

Proof. Using (4)

$$\begin{aligned} R_\mu &= \chi(-1) \sum_{s=1}^{p-2} \chi(s)\chi^\mu(s+1) = \chi(-1) \sum_{s=1}^{p-2} \chi(s)\chi_2(s+1) \\ &= \chi(-1) \left[\sum_{s=1}^{p-2} \chi(s)[1 + \chi_2(s+1)] - \sum_{s=1}^{p-2} \chi(s) \right]. \end{aligned}$$

If $s+1$ is not a square, then the expression in the square brackets vanishes. Letting $s+1 = t^2$ we obtain

$$R_\mu = \chi(-1) \left[\sum_{t=1}^{p-1} \chi(t^2 - 1) + \chi(-1) \right] = \chi(-1) \sum_{t=0}^{p-1} \chi(t^2 - 1).$$

Now let $t = 2s+1$, then

$$R_\mu = \chi(-4) \sum_{s=1}^{p-2} \chi(s)\chi(s+1) = \chi(4)R_1.$$

LEMMA 3. If k is oddly even, then

$$(8) \quad R_{2\nu}^{(k)}(\alpha) = \chi_{2\nu+1}(4)R_{\nu}^{(2\nu+1)}(\beta) \text{ where } k = 4\nu + 2, \text{ and } \beta = \alpha^2.$$

Proof.

$$\begin{aligned} R_{2\nu}^{(k)}(\alpha) &= \sum_{s=1}^{p-2} \chi(s)\chi^{2\nu+1}(s+1) = \sum_{s=1}^{p-2} \chi(\bar{s})\chi^{2\nu+1}(\bar{s}+1) \\ &= \sum_{s=1}^{p-2} \chi^{4\nu+1}(s)\chi^{2\nu+2}(\bar{s}+1) = \sum_{s=1}^{p-2} \chi^{2\nu}(s)\chi^{2\nu+1}(s+1) \\ &= \sum_{s=1}^{p-2} \chi_{2\nu+1}^\nu(s)\chi_2(s+1) \\ &= \sum_{s=1}^{p-2} \chi_{2\nu+1}^\nu(s)[1 + \chi_2(s+1)] - \sum_{s=1}^{p-2} \chi_{2\nu+1}^\nu(s). \end{aligned}$$

Letting $s+1 = t^2$ as before:

$$\begin{aligned} R_{2\nu}^{(k)}(\alpha) &= \sum_{t=0}^{p-2} \chi_{2\nu+1}^\nu(t^2 - 1) = \chi_{2\nu+1}(4) \sum_{s=1}^{p-2} \chi_{2\nu+1}^\nu(s)\chi_{2\nu+1}^\nu(s+1) \\ &= \chi_{2\nu+1}(4)R_1^{(2\nu+1)}(\beta^\nu) \\ &= \chi_{2\nu+1}(4)R_{\nu}^{(2\nu+1)}(\beta) \end{aligned}$$

by Lemma 1.

But by (4) and Lemma 2:

$$R_{2\nu+1} = \chi(-1)R_{2\nu} = \chi_k(4)R_1, \quad k = 4\nu + 2.$$

Hence by Lemma 3:

$$(9) \quad R_1^{(k)}(\alpha) = \chi_k(-4)R_{\nu}^{2\nu+1}(\beta) = \chi_k(-4)R_1^{2\nu+1}(\beta^{\nu})$$

Armed with these relations we can express all the Jacobi functions for $k = 3, 4, 5$ and 6 in terms of the corresponding R_1 as follows.

$$k = 3, R_2 = -1$$

$$k = 4, R_3 = -\chi(-1), R_2 = \chi(-1)R_1 \text{ by (3)}$$

$$k = 5, R_4 = -1, R_3 = R_1 \text{ by (3) and } R_2 = R_1(\alpha^2) \text{ by Lemma 1.}$$

$$k = 6, R_5 = -\chi(-1). R_4 = \chi(-1)R_1 \text{ and } R_3 = \chi(-1)R_2 \text{ by (3).}$$

By Lemma 2, however, $R_3 = \chi(4)R_1$ and hence $R_2 = \chi(-4)R_1$. Moreover by (9) $R_1^{(6)} = \chi(-4)R_1^{(3)}$ so that it is sufficient to determine R_1 for $k = 3$ in order to determine all the R 's for $k = 3$ and $k = 6$.

We now proceed to expand R_1 in powers of α . If we write

$$R_1 = \chi(-1) \sum_{s=1}^{p-2} \chi(s)\chi(s+1) = \chi(-1) \sum_{\nu=0}^{k-1} a_{\nu} \alpha^{\nu}$$

then a_{ν} is the number of solutions of

$$s^2 + s = g^{kt+\nu} \quad (t = 0, 1, \dots, n-1)$$

and is given by

$$a_{\nu} = \sum_{\nu=0}^{k-1} \sum_{t=0}^{n-1} [1 + \chi_2(1 + 4g^{kt+\nu})].$$

Hence

$$\begin{aligned} R_1 &= \chi(-1) \sum_{\nu=0}^{k-1} \sum_{t=0}^{n-1} \chi_2(1 + 4g^{kt+\nu}) \alpha^{\nu} \\ &= \frac{\chi(-1)}{k} \sum_{\nu=0}^{k-1} \sum_{x=1}^{p-1} \chi_2(1 + 4x^k g^{\nu}) \alpha^{\nu} \\ &= \frac{\chi(-1)}{k} \sum_{\nu=0}^{k-1} \alpha^{\nu} \sum_{x=0}^{p-1} \chi_2(4g^{\nu}) \chi_2(x^k + (\overline{4g^{\nu}})) \\ &= \frac{\chi(-1)}{k} \sum_{\nu=0}^{k-1} \chi_2(4g^{\nu}) \psi_k(\overline{4g^{\nu}}) \end{aligned}$$

where [5]

$$\psi_k(D) = \sum_{x=1}^{p-1} \chi_2(x^k + D) = \begin{cases} \left(\frac{D}{P}\right) \psi_k(\overline{D}) & \text{if } k \text{ is even} \\ \left(\frac{D}{P}\right) \varphi_k(\overline{D}) & \text{if } k \text{ is odd} \end{cases}$$

and

$$\varphi_k(D) = \sum_{x=1}^{p-1} \chi_2(x)\chi_2(x^k + D) = -\left(\frac{D}{P}\right)\varphi_k(\bar{D}), \quad k \text{ even}$$

is the well-known Jacobsthal [3] function. Hence

$$(10) \quad R_1 = \begin{cases} \frac{\chi(-1)}{k} \sum_{\nu=0}^{k-1} \psi_k(4g^\nu) \alpha^\nu & \text{if } k \text{ is even} \\ \frac{1}{k} \sum_{\nu=0}^{k-1} \varphi_k(4g^\nu) \alpha^\nu & \text{if } k \text{ is odd.} \end{cases}$$

Making use of the relations [5]

$$(11) \quad \varphi_k(m^k D) = \chi_2^{k+1}(m)\varphi_k(D)$$

$$(12) \quad \psi_k(m^k D) = \chi_2^k(m)\psi_k(D)$$

and

$$(13) \quad \psi_{2k}(D) = \psi_k(D) + \varphi_k(D)$$

we have for k even, substituting (13) into (10)

$$R_1 = \frac{\chi(-1)}{k} \left[\sum_{\nu=0}^{k-1} \psi_{k/2}(4g^\nu) \alpha^\nu + \sum_{\nu=0}^{k-1} \varphi_{k/2}(4g^\nu) \alpha^\nu \right].$$

By (11) and (12)

$$(14) \quad R_1 = \begin{cases} \frac{2\chi(-1)}{k} \sum_{\nu=0}^{k-1} \psi_{k/2}(4g^\nu) \alpha^\nu & \text{if } k/2 \text{ is odd} \\ \frac{2\chi(-1)}{k} \sum_{\nu=0}^{k-1} \varphi_{k/2}(4g^\nu) \alpha^\nu & \text{if } k/2 \text{ is even.} \end{cases}$$

Since the functions φ and ψ have been unequivocally determined by us in [5] and [6] for $k = 3, 4, 5$ and 6 in case 2 is not a k th power residue we can apply these results directly to the determination of the corresponding R_1 . For $k = 3$ let $p = A^2 + 3B^2 = 3n + 1$, $A \equiv B \equiv 1 \pmod{3}$.

By (10)

$$R_1 = \frac{1}{3} [\varphi_3(4) + \omega\varphi_3(4g) + \omega^2\varphi_3(4g^2)].$$

By [6]

$$\varphi_3(D) = \begin{cases} -(2A + 1) & \text{if } D \equiv u^3 \pmod{p} \\ A - 3B - 1 & \text{if } D \equiv 2u^3 \pmod{p} \\ A + 3B - 1 & \text{if } D \equiv 4u^3 \pmod{p}. \end{cases}$$

Hence

$$R_1 = \begin{cases} \frac{1}{3} [(A + 3B - 1) - (2A + 1)\omega + (A - 3B - 1)\omega^2] & \text{if } \text{ind } 2 \equiv 1 \pmod{3} \\ \frac{1}{3} [(A + 3B - 1) - (A - 3B - 1)\omega - (2A + 1)\omega^2] & \text{if } \text{ind } 2 \equiv 2 \pmod{3} \end{cases}$$

or

$$R_1 = \begin{cases} 2B + (B - A)\omega & \text{if } \text{ind } 2 \equiv 1(3) \text{ or if } \chi_3(2) = \omega \\ 2B + (B - A)\omega^2 & \text{if } \text{ind } 2 \equiv 2(3) \text{ or if } \chi_3(2) = \omega^2. \end{cases}$$

Hence if $\chi(2) \neq 1$, then

$$(15) \quad R_1 = 2B + (B - A)\chi_3(2), \quad A \equiv B \equiv 1 \pmod{3}.$$

If 2 is a cubic residue, $B \equiv 0 \pmod{3}$ and the sign of B is not determined. However

$$\begin{aligned} R_1 &= \frac{1}{3} [\varphi_3(1) + \varphi_3(g)\omega + \varphi_3(g^2)\omega^2] \\ &= \frac{1}{3} [-(2A + 1) + (A \pm 3B - 1)\omega + (A \mp 3B - 1)\omega^2] \\ &= -A \pm B(\omega - \omega^2) = (-A \pm B) \pm 2B\omega. \end{aligned}$$

For $k = 4$, $p = a^2 + b^2 = 4n + 1$, $a \equiv 1 \pmod{4}$ we obtain from (14)

$$R_1 = \frac{\chi_4(-1)}{2} [\varphi_4(4) + i\varphi_4(4g)].$$

We know that² [5]

$$\begin{aligned} \varphi_2(u^2) &= -\chi_2(u)2a \\ \varphi_2(2u^2) &= -\chi_2(u)2b \text{ if } \chi_2(2) = -1, [b/2 \equiv 1 \pmod{4}] \\ \varphi_2(\sqrt{2}u^2) &= -\chi_2(u)2b \text{ if } \chi_2(2) = +1, [b/4 \equiv (-1)^{n/2} \pmod{4}]. \end{aligned}$$

If $\chi_2(2) = -1$, then $\chi_4(-1) = -1$, and $\text{ind } 2 \equiv 1 \text{ or } 3 \pmod{4}$ so that

$$R_1 = \begin{cases} -(a + ib) & \text{if } \text{ind } 2 \equiv 1 \pmod{4} \\ -(a - ib) & \text{if } \text{ind } 2 \equiv 3 \pmod{4} \end{cases}$$

or

$$(16) \quad R_1 = -[a + b\chi_4(2)] \text{ if } \chi_2(2) = -1, [b/2 \equiv 1 \pmod{4}].$$

² There is a misprint in the corresponding formula (13) in [6] for $b/4 \equiv (-1)^n$ read $b/4 \equiv (-1)^{n/2}$. The same mistake is repeated four lines down.

If $\chi_2(2) = +1$, then $\chi_4(-1) = +1$. But $\chi_4(2) = -1$ and $\text{ind } \sqrt{2} \equiv 1 \pmod{4}$ or $3 \pmod{4}$. Hence

$$R_1 = \begin{cases} -a - bi & \text{if } \text{ind } \sqrt{2} \equiv 1 \pmod{4} \\ -a + bi & \text{if } \text{ind } \sqrt{2} \equiv 3 \pmod{4} \end{cases}$$

or

$$(17) \quad R_1 = -[a + b\chi_4(\sqrt{2})] \text{ if } \chi_2(2) = 1, [b/4 \equiv (-1)^{b/2} \pmod{4}] .$$

If $\chi_4(2) = +1$, then $\chi_4(-1) = +1$, and

$$R_1 = -a \pm bi$$

but the sign of b remains undetermined.

For $k = 5$, we have by (10)

$$R_1 = \frac{1}{5} [\varphi_5(4) + \alpha\varphi_5(4g) + \alpha^2\varphi_5(4g^2) + \alpha^3\varphi_5(4g^3) + \alpha^4\varphi_5(4g^4)]$$

The φ 's have been determined previously [6] in terms of the partition

$$\begin{cases} 16p = x^2 + 50u^2 + 50v^2 + 125w^2 \\ xw = v^2 - u^2 - 4uv, \quad x \equiv 1 \pmod{5} \end{cases}$$

to read

$$\varphi_5(4) = x - 1$$

$$\varphi_5(4g) = \frac{1}{4} [-4 - x + 25w + 10(u + 2v)]$$

$$\varphi_5(4g^2) = \frac{1}{4} [-4 - x - 25w + 10(2u - v)]$$

$$\varphi_5(4g^3) = \frac{1}{4} [-4 - x - 25w - 10(2u - v)]$$

$$\varphi_5(4g^4) = \frac{1}{4} [-4 - x + 25w - 10(u + 2v)] .$$

This gives

$$\begin{aligned} R_1 = \frac{1}{4} & [x + \alpha(5w + 2u + 4v) + \alpha^2(-5w + 4u - 2v) \\ & + \alpha^3(-5w - 4u + 2v) + \alpha^4(5w - 2u - 4v)] . \end{aligned}$$

In a previous paper [6] we have determined (x, u, v, w) uniquely in case $\text{ind } 2 \equiv 1 \pmod{5}$ by selecting u even and $v \equiv x + u \pmod{4}$. If $\text{ind } 2 \equiv m \pmod{5}$, the coefficient of α^{mv} becomes $\varphi(4g^v)$ or the coefficient of α^v is $\varphi(4g^{mv})$. This transformation is achieved if the solution:

(x, u, v, w) is replaced by $\begin{cases} (x, v, -u, -w) \text{ ind } 2 \equiv 2 \pmod{5} \\ (x, -v, u, -w) \text{ ind } 2 \equiv 3 \pmod{5} \\ (x, -u, -v, w) \text{ ind } 3 \equiv 4 \pmod{5} \end{cases}$.

As before, if $\text{ind } 2 \equiv 0 \pmod{5}$, the indeterminacy remains.

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