

# The luaotfload package

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## Abstract

This package is an adaptation of the ConT<sub>E</sub>Xt font loading system. It allows for loading OpenType fonts with an extended syntax and adds support for a variety of font features.

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## I Package Description

### 1 INTRODUCTION

Font management and installation has always been painful with  $\TeX$ . A lot of files are needed for one font (*TFM*, *PFB*, *MAP*, *FD*, *VF*), and due to the 8-Bit encoding each font is limited to 256 characters. But the font world has evolved since the original  $\TeX$ , and new typographic systems have appeared, most notably the so called *smart font* technologies like OpenType fonts (*OTF*). These fonts can contain many more characters than  $\TeX$  fonts, as well as additional functionality like ligatures, old-style numbers, small capitals, etc., and support more complex writing systems like Arabic and Indic<sup>1</sup> scripts. OpenType fonts are widely deployed and available for all modern operating systems. As of 2013 they have become the de facto standard for advanced text layout. However, until recently the only way to use them directly in the  $\TeX$  world was with the  $X_{\text{}}\TeX$  engine.

Unlike  $X_{\text{}}\TeX$ , Lua $\TeX$  has no built-in support for OpenType or technologies other than the original  $\TeX$  fonts. Instead, it provides hooks for executing Lua code during the  $\TeX$  run that allow implementing extensions for loading fonts and manipulating how input text is processed without modifying the underlying engine. This is where luaotfload comes into play: Based on code from ConTeXt, it extends Lua $\TeX$  with functionality necessary for handling OpenType fonts. Additionally, it provides means for accessing fonts known to the operating system conveniently by indexing the metadata.

### 2 THANKS

Luaotfload is part of Lua $\LaTeX$ , the community-driven project to provide a foundation for using the  $\LaTeX$  format with the full capabilities of the Lua $\TeX$  engine. As such, the distinction between end users, contributors, and project maintainers is intentionally kept less strict, lest we unduly personalize the common effort.

Nevertheless, the current maintainers would like to express their gratitude to Khaled Hosny, Akira Kakuto, Hironori Kitagawa and Dohyun Kim. Their contributions – be it patches, advice, or systematic testing – made the switch from version 1.x to 2.2 possible. Also, Hans Hagen, the author of the font loader, made porting the code to  $\LaTeX$  a breeze due to the extra effort he invested into isolating it from the rest of ConTeXt, not to mention his assistance in the task and willingness to respond to our suggestions.

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<sup>1</sup>Unfortunately, luaotfload doesn't support many Indic scripts right now. Assistance in implementing the prerequisites is greatly appreciated.

### 3 *LOADING FONTS*

luaotfload supports an extended font request syntax:

```
\font\foo={⟨prefix⟩:⟨font name⟩:⟨font features⟩}⟨TEX font features⟩
```

The curly brackets are optional and escape the spaces in the enclosed font name. Alternatively, double quotes serve the same purpose. A selection of individual parts of the syntax are discussed below; for a more formal description see figure 1.

#### 3.1 *Prefix – the luaotfload Way*

In luaotfload, the canonical syntax for font requests requires a *prefix*:

```
\font\fontname=⟨prefix⟩:⟨fontname⟩...
```

where *⟨prefix⟩* is either *file:* or *name:*. It determines whether the font loader should interpret the request as a *file name* or *font name*, respectively, which again influences how it will attempt to locate the font. Examples for font names are “Latin Modern Italic”, “GFS Bodoni Rg”, and “PT Serif Caption” – they are the human readable identifiers usually listed in drop-down menus and the like. In order for fonts installed both in system locations and in your *texmf* to be accessible by font name, luaotfload must first collect the metadata included in the files. Please refer to section 5 below for instructions on how to create the database.

File names are whatever your file system allows them to be, except that that they may not contain the characters *(, :, and /*. As is obvious from the last exception, the *file:* lookup will not process paths to the font location – only those files found when generating the database are addressable this way. Continue below in the X<sub>Y</sub>T<sub>E</sub>X section if you need to load your fonts by path. The file names corresponding to the example font names above are *lmroman12-italic.otf*, *GFSBodoni.otf*, and *PTZ56F.ttf*.

#### 3.2 *Compatibility Layer*

In addition to the regular prefixed requests, luaotfload accepts loading fonts the X<sub>Y</sub>T<sub>E</sub>X way. There are again two modes: bracketed and unbracketed. A bracketed request looks as follows.

```
\font\fontname=[⟨path to file⟩]
```

Inside the square brackets, every character except for a closing bracket is permitted, allowing for specifying paths to a font file. Naturally, path-less file names are equally valid and processed the same way as an ordinary *file:* lookup.

```
\font\fontname=⟨font name⟩ ...
```

Unbracketed (or, for lack of a better word: *anonymous*) font requests resemble the conventional T<sub>E</sub>X syntax. However, they have a broader spectrum of possible interpretations: before anything else, luaotfload attempts to load a traditional T<sub>E</sub>X Font Metric

(*TFM* or *OFM*). If this fails, it performs a `name:` lookup, which itself will fall back to a `file:` lookup if no database entry matches  $\langle font\ name \rangle$ .

Furthermore, `luaotfload` supports the slashed (shorthand) font style notation from  $\text{\XeTeX}$ .

```
\font\fontname= $\langle font\ name \rangle$ / $\langle modifier \rangle$ ...
```

Currently, four style modifiers are supported: `I` for italic shape, `B` for bold weight, `BI` or `IB` for the combination of both. Other “slashed” modifiers are too specific to the  $\text{\XeTeX}$  engine and have no meaning in  $\text{\LuaTeX}$ .

### 3.3 Examples

#### 3.3.1 Loading by File Name

For example, conventional *TYPE1* font can be loaded with a `file:` request like so:

```
\font\lmromanten={file:ec-lmr10} at 10pt
```

The `OpenType` version of Janusz Nowacki’s font *Antykwa Półtawskiego*<sup>2</sup> in its condensed variant can be loaded as follows:

```
\font\apcregular=file:antpolttcond-regular.otf at 42pt
```

The next example shows how to load the *Porson* font digitized by the Greek Font Society using  $\text{\XeTeX}$ -style syntax and an absolute path from a non-standard directory:

```
\font\gfsponsor="/tmp/GFSPorson.otf" at 12pt
```

#### 3.3.2 Loading by Font Name

The `name:` lookup does not depend on cryptic filenames:

```
\font\pagellaregular={name:TeX Gyre Pagella} at 9pt
```

A bit more specific but essentially the same lookup would be:

```
\font\pagellaregular={name:TeX Gyre Pagella Regular} at 9pt
```

Which fits nicely with the whole set:

---

<sup>2</sup><http://jmn.pl/antykwa-poltawskiego/>, also available in  $\text{\TeX}$  Live.

```

\font\pagellaregular   ={\name:TeX Gyre Pagella Regular}    at 9pt
\font\pagellaitalic    ={\name:TeX Gyre Pagella Italic}     at 9pt
\font\pagellabold      ={\name:TeX Gyre Pagella Bold}       at 9pt
\font\pagellabolditalic={\name:TeX Gyre Pagella Bolditalic} at 9pt

{\pagellaregular      foo bar baz\endgraf}
{\pagellaitalic       foo bar baz\endgraf}
{\pagellabold         foo bar baz\endgraf}
{\pagellabolditalic   foo bar baz\endgraf}

...

```

### 3.3.3 Modifiers

If the entire *Iwona* family<sup>3</sup> is installed in some location accessible by `luaotfload`, the regular shape can be loaded as follows:

```
\font\iwona=Iwona at 20pt
```

To load the most common of the other styles, the slash notation can be employed as shorthand:

```

\font\iwonaitalic      =Iwona/I      at 20pt
\font\iwonabold        =Iwona/B      at 20pt
\font\iwonabolditalic  =Iwona/BI     at 20pt

```

which is equivalent to these full names:

```

\font\iwonaitalic      ="Iwona Italic"    at 20pt
\font\iwonabold        ="Iwona Bold"      at 20pt
\font\iwonabolditalic  ="Iwona BoldItalic" at 20pt

```

## 4 FONT FEATURES

*Font features* are the second to last component in the general scheme for font requests:

```
\font\foo={ <prefix>: <font name>: <font features> } <TeX font features>
```

If style modifiers are present (X<sub>Y</sub>TeX style), they must precede *<font features>*.

The element *<font features>* is a semicolon-separated list of feature tags<sup>4</sup> and font options. Prepending a font feature with a + (plus sign) enables it, whereas a - (minus) disables it. For instance, the request

<sup>3</sup><http://jmn.pl/kurier-i-iwona/>, also in T<sub>E</sub>X Live.

<sup>4</sup>Cf. <http://www.microsoft.com/typography/otspec/featurelist.htm>.

```
\font\test=LatinModernRoman:+clig;-kern
```

activates contextual ligatures (`clig`) and disables kerning (`kern`). Alternatively the options `true` or `false` can be passed to the feature in a key/value expression. The following request has the same meaning as the last one:

```
\font\test=LatinModernRoman:clig=true;kern=false
```

Furthermore, this second syntax is required should a font feature accept other options besides a true/false switch. For example, *stylistic alternates* (`salt`) are variants of given glyphs. They can be selected either explicitly by supplying the variant index (starting from one), or randomly by setting the value to, obviously, `random`.

```
\font\librmsaltfirst=LatinModernRoman:salt=1
```

Other font options include:

### **mode**

`luaotfload` has two OpenType processing *modes*: `base` and `node`.

`base` mode works by mapping OpenType features to traditional T<sub>E</sub>X ligature and kerning mechanisms. Supporting only non-contextual substitutions and kerning pairs, it is the slightly faster, albeit somewhat limited, variant. `node` mode works by processing T<sub>E</sub>X's internal node list directly at the Lua end and supports a wider range of OpenType features. The downside is that the intricate operations required for `node` mode may slow down typesetting especially with complex fonts and it does not work in math mode.

By default `luaotfload` is in `node` mode, and `base` mode has to be requested where needed, e. g. for math fonts.

### **script**

An OpenType script tag;<sup>5</sup> the default value is `df1t`. Some fonts, including very popular ones by foundries like Adobe, do not assign features to the `df1t` script, in which case the script needs to be set explicitly.

### **language**

An OpenType language system identifier,<sup>6</sup> defaulting to `df1t`.

### **featurefile**

A comma-separated list of feature files to be applied to the font. Feature files contain a textual representation of OpenType tables and extend the features of a font on fly. After they are applied to a font, features defined in a feature file can

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<sup>5</sup>See <http://www.microsoft.com/typography/otspec/scripttags.htm> for a list of valid values. For scripts derived from the Latin alphabet the value `latn` is good choice.

<sup>6</sup>Cf. <http://www.microsoft.com/typography/otspec/languagetags.htm>.

be enabled or disabled just like any other font feature. The syntax is documented in Adobe's OpenType Feature File Specification.<sup>7</sup>

For a demonstration of how to set a `tkrn` feature consult the file `tkrn.fea` that is part of `luaotfload`. It can be read and applied as follows:

```
\font\test=Latin Modern Roman:featurefile=tkrn.fea;+tkrn
```

### color

A font color, defined as a triplet of two-digit hexadecimal *RGB* values, with an optional fourth value for transparency (where `00` is completely transparent and `FF` is opaque).

For example, in order to set text in semitransparent red:

```
\font\test={Latin Modern Roman}:color=FF0000BB
```

### protrusion & expansion

These keys control microtypographic features of the font, namely *character protrusion* and *font expansion*. Their arguments are names of Lua tables that contain values for the respective features.<sup>8</sup> For both, only the set `default` is predefined.

For example, to enable default protrusion<sup>9</sup>:

```
\font\test=LatinModernRoman:protrusion=default
```

**Non-standard font features** `luaotfload` adds a number of features that are not defined in the original OpenType specification, most of them aiming at emulating the behavior familiar from other  $\TeX$  engines. Currently (2013) there are three of them:

**anum** Substitutes the glyphs in the *ASCII* number range with their counterparts from eastern Arabic or Persian, depending on the value of `language`.

**tlig** Applies legacy  $\TeX$  ligatures:

```
“ ” ‘ ’ “ ” _ _
— --- ¡ ! ‘
¿ ? ‘
```

<sup>7</sup>Cf. [http://www.adobe.com/devnet/opentype/afdko/topic\\_feature\\_file\\_syntax.html](http://www.adobe.com/devnet/opentype/afdko/topic_feature_file_syntax.html).

<sup>8</sup>For examples of the table layout please refer to the section of the file `luaotfload-fonts-ext.lua` where the default values are defined. Alternatively and with loss of information, you can dump those tables into your terminal by issuing

```
\directlua{inspect(fonts.protrusions.setups.default)
inspect(fonts.expansions.setups.default)}
```

at some point after loading `luaotfload.sty`.

<sup>9</sup>You also need to set `pdfprotrudechars=2` and `pdfadjustspacing=2` to activate protrusion and expansion, respectively. See the [pdf \$\TeX\$  manual](#) for details.

**itlc** Computes italic correction values (active by default).

## 5 FONT NAMES DATABASE

As mentioned above, `luaotfload` keeps track of which fonts are available to Lua $\TeX$  by means of a *database*. This allows referring to fonts not only by explicit filenames but also by the proper names contained in the metadata which is often more accessible to humans.<sup>11</sup>

When `luaotfload` is asked to load a font by a font name, it will check if the database exists and load it, or else generate a fresh one. Should it then fail to locate the font, an update to the database is performed in case the font has been added to the system only recently. As soon as the database is updated, the resolver will try and look up the font again, all without user intervention. The goal is for `luaotfload` to act in the background and behave as unobtrusively as possible, while providing a convenient interface to the fonts installed on the system.

Generating the database for the first time may take a while since it inspects every font file on your computer. This is particularly noticeable if it occurs during a typesetting run. In any case, subsequent updates to the database will be quite fast.

### 5.1 `luaotfload-tool` / `mkluatexfontdb.lua`<sup>12</sup>

It can still be desirable at times to do some of these steps manually, and without having to compile a document. To this end, `luaotfload` comes with the utility `luaotfload-tool` that offers an interface to the database functionality. Being a Lua script, there are two ways to run it: either make it executable (`chmod +x` on unixoid systems) or pass it as an argument to `texlua`.<sup>13</sup> Invoked with the argument `--update` it will perform a database update, scanning for fonts not indexed.

```
luaotfload-tool --update
```

Adding the `--force` switch will initiate a complete rebuild of the database.

```
luaotfload-tool --update --force
```

For sake of backwards compatibility, `luaotfload-tool` may be renamed or symlinked to `mkluatexfontdb`. Whenever it is run under this name, it will update the database first, mimicking the behavior of earlier versions of `luaotfload`.

<sup>10</sup>These contain the feature set `trep` of earlier versions of `luaotfload`.

Note to X $\LaTeX$  users: this is the equivalent of the assignment `mapping=text-tex` using X $\LaTeX$ 's input remapping feature.

<sup>11</sup>The tool `otfinfo` (comes with T $\TeX$  Live), when invoked on a font file with the `-i` option, lists the variety of name fields defined for it.

<sup>12</sup>The script may be named just `mkluatexfontdb` in your distribution.

<sup>13</sup>Tests by the maintainer show only marginal performance gain by running with Luigi Scarso's `Luajit $\TeX$` , which is probably due to the fact that most of the time is spent on file system operations.

*Note:* On MS Windows systems, the script can be run either by calling the wrapper application `luaotfload-tool.exe` or as `texlua.exe luaotfload-tool.lua`.



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Table 1: List of paths searched for each supported operating system.

Windows	%WINDIR%\Fonts
Linux	/usr/local/etc/fonts/fonts.conf and /etc/fonts/fonts.conf
Mac	~/Library/Fonts, /Library/Fonts, /System/Library/Fonts, and /Network/Library/Fonts

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## 5.2 *Search Paths*

luaotfload scans those directories where fonts are expected to be located on a given system. On a Linux machine it follows the paths listed in the Fontconfig configuration files; consult `man 5 fonts.conf` for further information. On Windows systems, the standard location is `Windows\Fonts`, while Mac OS X requires a multitude of paths to be examined. The complete list is given in table 1. Other paths can be specified by setting the environment variable `OSFONTDIR`. If it is non-empty, then search will be extended to the included directories.

## 5.3 *Querying from Outside*

luaotfload-tool also provides rudimentary means of accessing the information collected in the font database. If the option `--find=name` is given, the script will try and search the fonts indexed by luaotfload for a matching name. For instance, the invocation

```
luaotfload-tool --find="Iwona Regular"
```

will verify if “Iwona Regular” is found in the database and can be readily requested in a document.

If you are unsure about the actual font name, then add the `-F` (or `--fuzzy`) switch to the command line to enable approximate matching. Suppose you cannot precisely remember if the variant of Iwona you are looking for was “Bright” or “Light”. The query

```
luaotfload-tool -F --find="Iwona Bright"
```

will tell you that indeed the latter name is correct.

Basic information about fonts in the database can be displayed using the `-i` option (`--info`).

```
luaotfload-tool -i --find="Iwona Light Italic"
```

The meaning of the printed values is described in section 4.4 of the LuaTeX reference manual.<sup>14</sup>

`luaotfload-tool --help` will list the available command line switches, including some not discussed in detail here. For a full documentation of `luaotfload-tool` and its capabilities refer to the manpage (`man 1 luaotfload-tool`).<sup>15</sup>

#### 5.4 Blacklisting Fonts

Some fonts are problematic in general, or just in LuaTeX. If you find that compiling your document takes far too long or eats away all your system's memory, you can track down the culprit by running `luaotfload-tool -v` to increase verbosity. Take a note of the *filename* of the font that database creation fails with and append it to the file `luaotfload-blacklist.cnf`.

A blacklist file is a list of font filenames, one per line. Specifying the full path to where the file is located is optional, the plain filename should suffice. File extensions (`.otf`, `.ttf`, etc.) may be omitted. Anything after a percent (%) character until the end of the line is ignored, so use this to add comments. Place this file to some location where the `kpse` library can find it, e. g. `texmf-local/tex/luatex/luaotfload` if you are running TeX Live,<sup>16</sup> or just leave it in the working directory of your document. `luaotfload` reads all files named `luaotfload-blacklist.cnf` it finds, so the fonts in `./luaotfload-blacklist.cnf` extend the global blacklist.

Furthermore, a filename prepended with a dash character (-) is removed from the blacklist, causing it to be temporarily whitelisted without modifying the global file. An example with explicit paths:

```
% example otf-blacklist.cnf
/Library/Fonts/GillSans.ttc % Luaotfload ignores this font.
-/Library/Fonts/Optima.ttc % This one is usable again, even if
                             % blacklisted somewhere else.
```

## 6 FILES FROM CONTEX-T AND LUALATX-FONTS

`luaotfload` relies on code originally written by Hans Hagen<sup>17</sup> for and tested with ConTeXt. It integrates the font loader as distributed in the LuaTeX-Fonts package. The original Lua source files have been combined using the `mtx-package` script into a single, self-contained blob. In this form the font loader has no further dependencies<sup>18</sup> and requires only minor adaptations to integrate into `luaotfload`. The guiding principle is to let ConTeXt/LuaTeX-Fonts take care of the implementation, and update the imported code from time to time. As maintainers, we aim at importing files from upstream essentially *unmodified*, except for renaming them to prevent name clashes. This job has been greatly alleviated since the advent of LuaTeX-Fonts, prior to which the individual dependencies

<sup>14</sup>In TeX Live: `texmf-dist/doc/luatex/base/luatexref-t.pdf`.

<sup>15</sup>Or see `luaotfload-tool.rst` in the source directory.

<sup>16</sup>You may have to run `mktexlsr` if you created a new file in your `texmf` tree.

<sup>17</sup>The creator of the ConTeXt format.

<sup>18</sup>It covers, however, to some extent the functionality of the `lualibs` package.

had to be manually spotted and extracted from the ConT<sub>E</sub>Xt source code in a complicated and error-prone fashion.

Below is a commented list of the files distributed with luaotfload in one way or the other. See figure 2 on page 25 for a graphical representation of the dependencies. From LuaT<sub>E</sub>X-Fonts, only the file luatex-fonts-merged.lua has been imported as luaotfload-merged.lua. It is generated by mtx-package, a Lua source code merging tool developed by Hans Hagen.<sup>19</sup> It houses several Lua files that can be classed in three categories.

- *Lua utility libraries*, a subset of what is provided by the lualibs package.

- l-lua.lua	- l-io.lua
- l-lpeg.lua	- l-file.lua
- l-function.lua	- l-boolean.lua
- l-string.lua	- l-math.lua
- l-table.lua	- util-str.lua

- The *font loader* itself. These files have been written for LuaT<sub>E</sub>X-Fonts and they are distributed along with luaotfload.

- luatex-basics-gen.lua	- luatex-fonts-chr.lua
- luatex-basics-nod.lua	- luatex-fonts-lua.lua
- luatex-fonts-enc.lua	- luatex-fonts-def.lua
- luatex-fonts-syn.lua	- luatex-fonts-ext.lua
- luatex-fonts-tfm.lua	- luatex-fonts-cbk.lua

- Code related to *font handling and node processing*, taken directly from ConT<sub>E</sub>Xt.

- data-con.lua	- font-otb.lua
- font-ini.lua	- node-inj.lua
- font-con.lua	- font-ota.lua
- font-cid.lua	- font-otn.lua
- font-map.lua	- font-def.lua
- font-oti.lua	- font-otp.lua
- font-otf.lua	

Note that if luaotfload cannot locate the merged file, it will load the individual Lua libraries instead. Their names remain the same as in ConT<sub>E</sub>Xt (without the otf1-prefix)

---

<sup>19</sup>mtx-package is part of ConT<sub>E</sub>Xt and requires mtxrun. Run `mtxrun --script package --help` to display further information. For the actual merging code see the file `util-mrg.lua` that is part of ConT<sub>E</sub>Xt.

since we imported the relevant section of `luatex-fonts.lua` unmodified into `luaotfload.lua`. Thus if you prefer running bleeding edge code from the ConTeXt beta, all you have to do is remove `luaotfload-merged.lua` from the search path.

Also, the merged file at some point loads the Adobe Glyph List from a Lua table that is contained in `luaotfload-glyphlist.lua`, which is automatically generated by the script `mkglyphlist`.<sup>20</sup> There is a make target `glyphs` that will create a fresh glyph list so we don't need to import it from ConTeXt any longer.

In addition to these, `luaotfload` requires a number of files not contained in the merge. Some of these have no equivalent in LuaTeX-Fonts or ConTeXt, some were taken unmodified from the latter.

- `luaotfload-features.lua` – font feature handling; incorporates some of the code from `font-otc` from ConTeXt;
- `luaotfload-lib-dir.lua` – `l-dir` from ConTeXt; contains functionality required by `luaotfload-font-nms.lua`.
- `luaotfload-override.lua` – overrides the ConTeXt logging functionality.
- `luaotfload-loaders.lua` – registers the OpenType font reader as handler for Postscript fonts (*PFA*, *PFB*).
- `luaotfload-database.lua` – font names database.
- `luaotfload-colors.lua` – color handling.
- `luaotfload-auxiliary.lua` – access to internal functionality for package authors (proposals for additions welcome).

## 7 TROUBLESHOOTING

If you encounter problems with some fonts, please first update to the latest version of this package before reporting a bug, as `luaotfload` is under active development and still a moving target. The development takes place on github at <https://github.com/lualatex/luaotfload> where there is an issue tracker for submitting bug reports, feature requests and the likes requests and the likes.

Errors during database generation can be traced by increasing verbosity levels and redirecting log output to `stdout`:

```
luaotfload-tool -fuvvv --log=stdout
```

If this fails, the font last printed to the terminal is likely to be the culprit. Please specify it when reporting a bug, and blacklist it for the time being (see above, page 10).

A common problem is the lack of features for some OpenType fonts even when specified. This can be related to the fact that some fonts do not provide features for the `df1t`

<sup>20</sup>See `luaotfload-font-enc.lua`. The hard-coded file name is why we have to replace the procedure that loads the file in `luaotfload-override.lua`.

script (see above on page 6), which is the default one in this package. If this happens, assigning a noth script when the font is defined should fix it. For example with latn:

```
\font\test=file:MyFont.otf:script=latn;+liga;
```

## II Implementation

### 8 luaotfload.lua

This file initializes the system and loads the font loader. To minimize potential conflicts between other packages and the code imported from ConT<sub>E</sub>Xt, several precautions are in order. Some of the functionality that the font loader expects to be present, like raw access to callbacks, are assumed to have been disabled by luatexbase when this file is processed. In some cases it is possible to trick it by putting dummies into place and restoring the behavior from luatexbase after initialization. Other cases such as attribute allocation require that we hook the functionality from luatexbase into locations where they normally wouldn't be.

Anyways we can import the code base without modifications, which is due mostly to the extra effort by Hans Hagen to make LuaT<sub>E</sub>X-Fonts self-contained and encapsulate it, and especially due to his willingness to incorporate our suggestions.

```
1 luaotfload = luaotfload or {}
2 local luaotfload = luaotfload
3
4 config = config or { }
5 config.luaotfload = config.luaotfload or { }
6 -----.luaotfload.resolver = config.luaotfload.resolver or "normal"
7 config.luaotfload.resolver = config.luaotfload.resolver or "cached"
8 config.luaotfload.definer = config.luaotfload.definer or "patch"
9 config.luaotfload.compatibility = config.luaotfload.compatibility or false
10 config.luaotfload.loglevel = config.luaotfload.loglevel or 1
11 config.luaotfload.color_callback = config.luaotfload.color_callback or "pre_line-break_filter"
12 --luaotfload.prefer_merge = config.luaotfload.prefer_merge or true
13
14 luaotfload.module = {
15     name = "luaotfload",
16     version = 2.2,
17     date = "2013/04/29",
18     description = "OpenType layout system.",
19     author = "Elie Roux & Hans Hagen",
20     copyright = "Elie Roux",
21     license = "GPL v2.0"
22 }
23
24 local luatexbase = luatexbase
```

```

25
26 local type, next      = type, next
27 local setmetatable    = setmetatable
28 local find_file       = kpse.find_file
29 local lfsisfile        = lfs.isfile
30 local stringfind       = string.find
31 local stringformat     = string.format
32 local stringmatch      = string.match
33 local stringsub        = string.sub
34
35 local add_to_callback, create_callback =
36     luatexbase.add_to_callback, luatexbase.create_callback
37 local reset_callback, call_callback =
38     luatexbase.reset_callback, luatexbase.call_callback
39
40 local dummy_function = function () end
41
42 local error, warning, info, log =
43     luatexbase.provides_module(luatofload.module)
44
45 luatofload.error      = error
46 luatofload.warning    = warning
47 luatofload.info       = info
48 luatofload.log        = log
49

```

We set the minimum version requirement for LuaTeX to v0.76, because the font loader requires recent features like direct attribute indexing and *node.end\_of\_math()* that aren't available in earlier versions.<sup>21</sup>

```

50
51 local luatex_version = 76
52
53 if tex.luatexversion < luatex_version then
54     warning("LuaTeX v%.2f is old, v%.2f is recommended.",
55         tex.luatexversion/100,
56         luatex_version /100)
57 end
58

```

Prepare directories: the cache function in Luatex-Fonts checks for a writable directory only once during startup. If there is no texmf-var at this time it will create a subdirectory ./luatex-cache instead. Thus everything has to be laid out before we load the fontloader.

```

59
60 local cachepath = kpse.expand_var"$TEXMFVAR"
61 if not lfs.isdir(cachepath) then

```

---

<sup>21</sup>See Taco's announcement of v0.76: <http://comments.gmane.org/gmane.comp.tex.luatex.user/4042> and this commit by Hans that introduced those features. <http://repo.or.cz/w/context.git/commitdiff/a51f6cf6ee087046a2ae5927ed4edff0a1acec1b>.

```

62     dir.mkdirs(cachepath)
63     if not lfs.isdir(cachepath) then
64         error( "ERROR could not create directory %s", cachepath)
65     end
66 end
67

```

## 8.1 *Module loading*

We load the files imported from ConT<sub>E</sub>Xt with this function. It automatically prepends the prefix `luaotfload-` to its argument, so we can refer to the files with their actual ConT<sub>E</sub>Xt name.

```

68
69 local fl_prefix = "luaotfload" -- "luatex" for luatex-plain
70 local loadmodule = function (name)
71     require(fl_prefix .. "-" .. name)
72 end
73

```

Before T<sub>E</sub>XLive 2013 version, LuaT<sub>E</sub>X had a bug that made ofm fonts fail when called with their extension. There was a side-effect making ofm totally unloadable when `luaotfload` was present. The following lines are a patch for this bug. The utility of these lines is questionable as they are not necessary since T<sub>E</sub>XLive 2013. They should be removed in the next version.

```

74 local Cs, P, lpegmatch = lpeg.Cs, lpeg.P, lpeg.match
75
76 local p_dot, p_slash = P".", P"/"
77 local p_suffix      = (p_dot * (1 - p_dot - p_slash)^1 * P(-1)) / ""
78 local p_removesuffix = Cs((p_suffix + 1)^1)
79
80 local find_vf_file = function (name)
81     local fullname = find_file(name, "ovf")
82     if not fullname then
83         --fullname = find_file(file.removesuffix(name), "ovf")
84         fullname = find_file(lpegmatch(p_removesuffix, name), "ovf")
85     end
86     if fullname then
87         log("loading virtual font file %s.", fullname)
88     end
89     return fullname
90 end
91

```

## 8.2 *Preparing the Font Loader*

We treat the fontloader as a black box so behavior is consistent between formats. We do no longer run the intermediate wrapper file `luaotfload-fonts.lua` which we used to import from [LuaT<sub>E</sub>X-Plain](#). Rather, we load the fontloader code directly in the same fashion as `luatex-fonts`. How this is executed depends on the presence on the *merged*

*font loader code.* In `luaotfload` this is contained in the file `luaotfload-merged.lua`. If this file cannot be found, the original libraries from ConT<sub>E</sub>Xt of which the merged code was composed are loaded instead. The imported font loader will call `callback.register` once while reading `font-def.lua`. This is unavoidable unless we modify the imported files, but harmless if we make it call a dummy instead. However, this problem might vanish if we decide to do the merging ourselves, like the `lualibs` package does. With this step we would obtain the freedom to load our own overrides in the process right where they are needed, at the cost of losing encapsulation. The decision on how to progress is currently on indefinite hold.

```

92
93 local starttime = os.gettimeofday()
94
95 local trapped_register = callback.register
96 callback.register      = dummy_function
97

```

By default, the fontloader requires a number of *private attributes* for internal use. These must be kept consistent with the attribute handling methods as provided by `luatexbase`. Our strategy is to override the function that allocates new attributes before we initialize the font loader, making it a wrapper around `luatexbase.new_attribute`.<sup>22</sup> The attribute identifiers are prefixed “`luaotfload@`” to avoid name clashes.

```

98
99 do
100   local new_attribute = luatexbase.new_attribute
101   local the_attributes = luatexbase.attributes
102
103   attributes = attributes or { }
104
105   attributes.private = function (name)
106     local attr = "luaotfload@" .. name --- used to be: "otfl@"
107     local number = the_attributes[attr]
108     if not number then
109       number = new_attribute(attr)
110     end
111     return number
112   end
113 end
114

```

These next lines replicate the behavior of `luatex-fonts.lua`.

```

115
116 local context_environment = { }
117
118 local push_namespaces = function ()
119   log("push namespace for font loader")
120   local normalglobal = { }
121   for k, v in next, _G do

```

---

<sup>22</sup>Many thanks, again, to Hans Hagen for making this part configurable!



```

122     normalglobal[k] = v
123 end
124 return normalglobal
125 end
126
127 local pop_namespaces = function (normalglobal, isolate)
128     if normalglobal then
129         local _G = _G
130         local mode = "non-destructive"
131         if isolate then mode = "destructive" end
132         log("pop namespace from font loader -- " .. mode)
133         for k, v in next, _G do
134             if not normalglobal[k] then
135                 context_environment[k] = v
136                 if isolate then
137                     _G[k] = nil
138                 end
139             end
140         end
141         for k, v in next, normalglobal do
142             _G[k] = v
143         end
144         -- just to be sure:
145         setmetatable(context_environment, _G)
146     else
147         log("irrecoverable error during pop_namespace: no globals to restore")
148         os.exit()
149     end
150 end
151
152 luaotfload.context_environment = context_environment
153 luaotfload.push_namespaces    = push_namespaces
154 luaotfload.pop_namespaces     = pop_namespaces
155
156 local our_environment = push_namespaces()
157

```

The font loader requires that the attribute with index zero be zero. We happily oblige. (Cf. `luatex-fonts-nod.lua`.)

```

158
159 tex.attribute[0] = 0
160

```

Now that things are sorted out we can finally load the fontloader.

```

161
162 loadmodule"merged.lua"
163 ---loadmodule"font-odv.lua" --- <= Devanagari support from Context
164
165 if fonts then
166

```

```

167     if not fonts._merge_loaded_message_done_ then
168         --- a program talking first person -- HH sure believes in strong AI ...
169         log[["I am using the merged version of 'luaotfload.lua' here. If]]
170         log[[ you run into problems or experience unexpected behaviour,]]
171         log[[ and if you have ConTeXt installed you can try to delete the]]
172         log[[ file 'luaotfload-font-merged.lua' as I might then use the]]
173         log[[ possibly updated libraries. The merged version is not]]
174         log[[ supported as it is a frozen instance. Problems can be]]
175         log[[ reported to the ConTeXt mailing list."]]
176     end
177     fonts._merge_loaded_message_done_ = true
178
179 else--- the loading sequence is known to change, so this might have to
180     --- be updated with future updates!
181     --- do not modify it though unless there is a change to the merged
182     --- package!
183     loadmodule("l-lua.lua")
184     loadmodule("l-lpeg.lua")
185     loadmodule("l-function.lua")
186     loadmodule("l-string.lua")
187     loadmodule("l-table.lua")
188     loadmodule("l-io.lua")
189     loadmodule("l-file.lua")
190     loadmodule("l-boolean.lua")
191     loadmodule("l-math.lua")
192     loadmodule("util-str.lua")
193     loadmodule('luatex-basics-gen.lua')
194     loadmodule('data-con.lua')
195     loadmodule('luatex-basics-nod.lua')
196     loadmodule('font-ini.lua')
197     loadmodule('font-con.lua')
198     loadmodule('luatex-fonts-enc.lua')
199     loadmodule('font-cid.lua')
200     loadmodule('font-map.lua')
201     loadmodule('luatex-fonts-syn.lua')
202     loadmodule('luatex-fonts-tfm.lua')
203     loadmodule('font-oti.lua')
204     loadmodule('font-otf.lua')
205     loadmodule('font-otb.lua')
206     loadmodule('node-inj.lua')
207     loadmodule('font-ota.lua')
208     loadmodule('font-otn.lua')
209     loadmodule('font-otp.lua')--- since 2013-04-23
210     loadmodule('luatex-fonts-lua.lua')
211     loadmodule('font-def.lua')
212     loadmodule('luatex-fonts-def.lua')
213     loadmodule('luatex-fonts-ext.lua')
214     loadmodule('luatex-fonts-cbk.lua')
215 end --- non-merge fallback scope
216

```

Here we adjust the globals created during font loader initialization. If the second argument to *pop\_namespaces()* is true this will restore the state of *\_G*, eliminating every global generated since the last call to *push\_namespaces()*. At the moment we see no reason to do this, and since the font loader is considered an essential part of luatex as well as a very well organized piece of code, we happily concede it the right to add to *\_G* if needed.

```

217
218 pop_namespaces(our_environment, false)-- true)
219
220 log("fontloader loaded in %0.3f seconds", os.gettimeofday()-starttime)
221

```

### 8.3 Callbacks

After the fontloader is ready we can restore the callback trap from luatexbase.

```

222
223 callback.register = trapped_register
224

```

We do our own callback handling with the means provided by luatexbase. Note: *pre\_linebreak\_filter* and *hpack\_filter* are coupled in ConT<sub>E</sub>Xt in the concept of *node processor*.

```

225
226 add_to_callback("pre_linebreak_filter",
227               nodes.simple_font_handler,
228               "luaotfload.node_processor",
229               1)
230 add_to_callback("hpack_filter",
231               nodes.simple_font_handler,
232               "luaotfload.node_processor",
233               1)
234 add_to_callback("find_vf_file",
235               find_vf_file, "luaotfload.find_vf_file")
236
237 loadmodule"lib-dir.lua" --- required by luaotfload-database.lua
238 loadmodule"override.lua" --- "luat-ovr"
239
240 logs.set_loglevel(config.luaotfload.loglevel)
241

```

Now we load the modules written for luaotfload.

```

242 loadmodule"loaders.lua" --- "font-pfb" new in 2.0, added 2011
243 loadmodule"database.lua" --- "font-nms"
244 loadmodule"colors.lua" --- "font-clr"
245

```

Relying on the name: resolver for everything has been the source of permanent trouble with the database. With the introduction of the new syntax parser we now have enough granularity to distinguish between the X<sub>Y</sub>TeX emulation layer and the genuine name:

and `file:` lookups of LuaTeX-Fonts. Another benefit is that we can now easily plug in or replace new lookup behaviors if necessary. The name resolver remains untouched, but it calls `fonts.names.resolve()` internally anyways (see `luaotfload-database.lua`).

```

246
247 local request_resolvers = fonts.definers.resolvers
248 local formats           = fonts.formats
249 formats.ofm             = "type1"
250

```

`luaotfload` promises easy access to system fonts. Without additional precautions, this cannot be achieved by `kpathsea` alone, because it searches only the `texmf` directories by default. Although it is possible for `kpathsea` to include extra paths by adding them to the `OSFONTDIR` environment variable, this is still short of the goal »*it just works!*«. When building the font database `luaotfload` scans system font directories anyways, so we already have all the information for looking sytem fonts. With the release version 2.2 the file names are indexed in the database as well and we are ready to resolve `file:` lookups this way. Thus we no longer need to call the `kpathsea` library in most cases when looking up font files, only when generating the database.

```

251
252 local resolvefile = fonts.names.crude_file_lookup
253 --local resolvefile = fonts.names.crude_file_lookup_verbose
254
255 function request_resolvers.file(specification)
256   local name=resolvefile(specification.name)
257   local suffix=file.suffix(name)
258   if formats[suffix] then
259     specification.forced=suffix
260     specification.name=file.removesuffix(name)
261   else
262     specification.name=name
263   end
264 end
265
266

```

We classify as `anon:` those requests that have neither a prefix nor brackets. According to Khaled<sup>23</sup> they are the X<sub>Y</sub>TeX equivalent of a `name:` request, so we will be treating them as such.

```

267
268 --request_resolvers.anon = request_resolvers.name
269

```

There is one drawback, though. This syntax is also used for requesting fonts in `Type1` (`TFM`, `OFM`) format. These are essentially `file:` lookups and must be caught before the `name:` resolver kicks in, lest they cause the database to update. Even if we were to require the `file:` prefix for all `Type1` requests, tests have shown that certain fonts still include

---

<sup>23</sup><https://github.com/phi-gamma/luaotfload/issues/4#issuecomment-17090553>.

further fonts (e. g. omlgcb.ofm will ask for omsecob.tfm) *using the old syntax*. For this reason, we introduce an extra check with an early return.

```

270 local type1_formats = { "tfm", "ofm", }
271
272 request_resolvers.anon = function (specification)
273     local name = specification.name
274     for i=1, #type1_formats do
275         local format = type1_formats[i]
276         if resolvers.findfile(name, format) then
277             specification.name = file.addsuffix(name, format)
278             return
279         end
280     end
281     request_resolvers.name(specification)
282 end
283

```

Prior to version 2.2, luaotfload did not distinguish file: and path: lookups, causing complications with the resolver. Now we test if the requested name is an absolute path in the file system, otherwise we fall back to the file: lookup.

```

284 request_resolvers.path = function (specification)
285     local exists, _ = lfsisfile(specification.name)
286     if not exists then -- resort to file: lookup
287         request_resolvers.file(specification)
288     end
289 end
290

```

We create a callback for patching fonts on the fly, to be used by other packages. It initially contains the empty function that we are going to override below.

```

291
292 create_callback("luaotfload.patch_font", "simple", dummy_function)
293

```

#### 8.4 ConTeXt override

We provide a simplified version of the original font definition callback.

```

294
295 local read_font_file = fonts.definers.read
296
297 --- spec -> size -> id -> tfmdata
298 local patch_defined_font = function (specification, size, id)
299     local tfmdata = read_font_file(specification, size, id)
300     if type(tfmdata) == "table" and tfmdata.shared then
301         --- We need to test for the "shared" field here
302         --- or else the fontspec capheight callback will
303         --- operate on tfm fonts.
304         call_callback("luaotfload.patch_font", tfmdata)
305     end
306

```

```

306     return tfmdata
307 end
308
309 reset_callback("define_font")
310

```

Finally we register the callbacks.

```

311
312 local font_definer = config.luaotfload.definer
313
314 if font_definer == "generic" then
315     add_to_callback("define_font",
316                   fonts.definers.read,
317                   "luaotfload.define_font",
318                   1)
319 elseif font_definer == "patch" then
320     add_to_callback("define_font",
321                   patch_defined_font,
322                   "luaotfload.define_font",
323                   1)
324 end
325
326 loadmodule"features.lua"    --- contains what was "font-ltx" and "font-otc"
327 loadmodule"auxiliary.lua"  --- additionally high-level functionality (new)
328
329 -- vim:tw=71:sw=4:ts=4:expandtab
330
331

```

## 9 luaotfload.sty

Classical Plain+ $\text{\LaTeX}$  package initialization.

```

332 \csname ifluaotfloadloaded\endcsname
333 \let\ifluaotfloadloaded\endinput
334 \bgroup\expandafter\expandafter\expandafter\egroup
335 \expandafter\ifx\csname ProvidesPackage\endcsname\relax
336   \input luatexbase.sty
337 \else
338   \NeedsTeXFormat{LaTeX2e}
339   \ProvidesPackage{luaotfload}%
340     [2013/05/10 v2.2 OpenType layout system]
341   \RequirePackage{luatexbase}
342 \fi
343 \ifnum\luatexversion<76
344   %% here some deprecation warning would be in order
345   \RequireLuaModule{lualibs}
346   \RequireLuaModule{luaotfload-legacy}
347 \else
348   \RequireLuaModule{luaotfload}

```

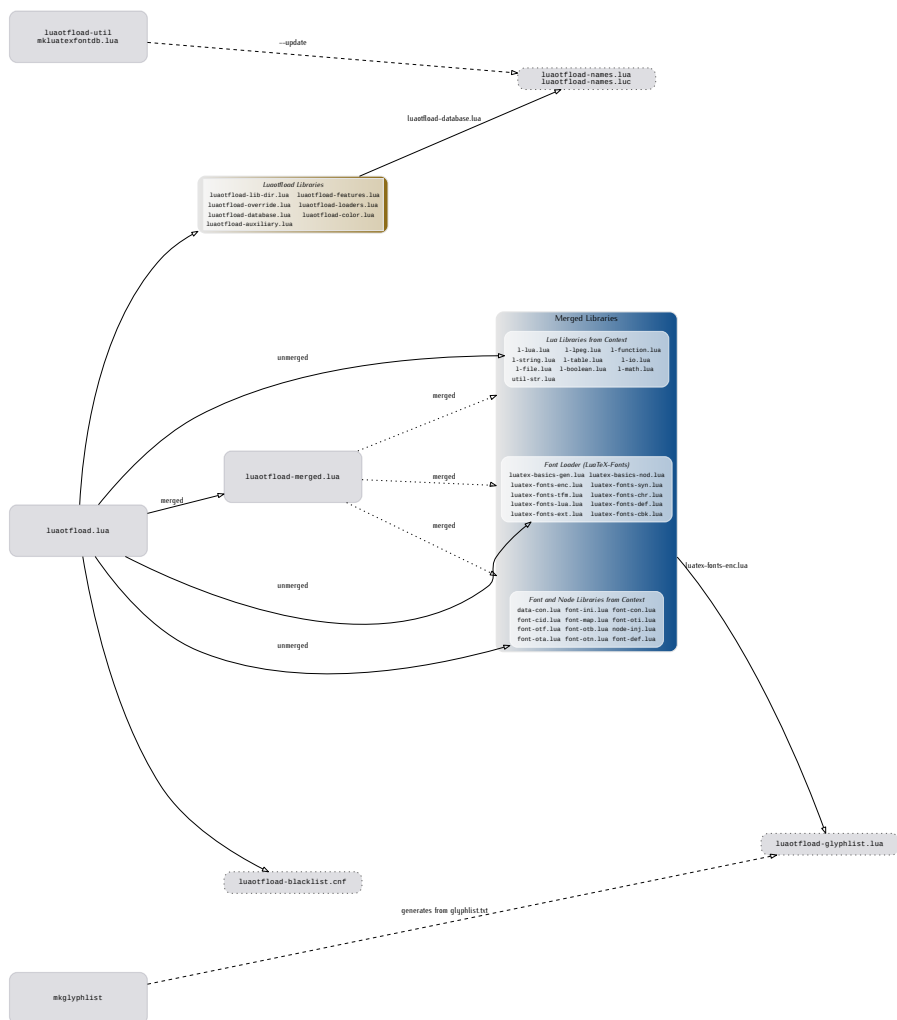
```
349 \fi
350 \endinput
```

$\langle \text{definition} \rangle$	::= $\backslash \text{font}$ , $\text{CSNAME}$ , '=', $\langle \text{font request} \rangle$ , [ $\langle \text{size} \rangle$ ] ;
$\langle \text{size} \rangle$	::= 'at', $\text{DIMENSION}$ ;
$\langle \text{font request} \rangle$	::= 'n', $\langle \text{unquoted font request} \rangle$ 'n'   't', $\langle \text{unquoted font request} \rangle$ '}'   $\langle \text{unquoted font request} \rangle$ ;
$\langle \text{unquoted font request} \rangle$	::= $\langle \text{specification} \rangle$ , [ ':' , $\langle \text{feature list} \rangle$ ]   '[', $\langle \text{path lookup} \rangle$ ']', [ [ ':' ], $\langle \text{feature list} \rangle$ ] ;
$\langle \text{specification} \rangle$	::= $\langle \text{prefixed spec} \rangle$ , [ $\langle \text{subfont no} \rangle$ ], { $\langle \text{modifier} \rangle$ }   $\langle \text{anon lookup} \rangle$ , { $\langle \text{modifier} \rangle$ } ;
$\langle \text{prefixed spec} \rangle$	::= 'file:', $\langle \text{file lookup} \rangle$   'name:', $\langle \text{name lookup} \rangle$ ;
$\langle \text{file lookup} \rangle$	::= { $\langle \text{name character} \rangle$ } ;
$\langle \text{name lookup} \rangle$	::= { $\langle \text{name character} \rangle$ } ;
$\langle \text{anon lookup} \rangle$	::= $\text{TFMNAME}$   $\langle \text{name lookup} \rangle$ ;
$\langle \text{path lookup} \rangle$	::= { $\text{ALL\_CHARACTERS}$ - ']' } ;
$\langle \text{modifier} \rangle$	::= '/', ('I'   'B'   'BI'   'IB'   'S=', { $\text{DIGIT}$ } ) ;
$\langle \text{subfont no} \rangle$	::= '(', { $\text{DIGIT}$ }, ')' ;
$\langle \text{feature list} \rangle$	::= $\langle \text{feature expr} \rangle$ , { ',', $\langle \text{feature expr} \rangle$ } ;
$\langle \text{feature expr} \rangle$	::= $\text{FEATURE\_ID}$ , '=', $\text{FEATURE\_VALUE}$   $\langle \text{feature switch} \rangle$ , $\text{FEATURE\_ID}$ ;
$\langle \text{feature switch} \rangle$	::= '+'   '-' ;
$\langle \text{name character} \rangle$	::= $\text{ALL\_CHARACTERS}$ - ( '('   '/'   ':' ) ;

Figure 1: Font request syntax. Braces or double quotes around the *specification* rule will preserve whitespace in file names. In addition to the font style modifiers (*slash-notation*) given above, there are others that are recognized but will be silently ignored: aat, icu, and gr. The special terminals are:  $\text{FEATURE\_ID}$  for a valid font feature name and  $\text{FEATURE\_VALUE}$  for the corresponding value.  $\text{TFMNAME}$  is the name of a *TFM* file.  $\text{DIGIT}$  again refers to bytes 48–57, and  $\text{ALL\_CHARACTERS}$  to all byte values.  $\text{CSNAME}$  and  $\text{DIMENSION}$  are the  $\text{T}_{\text{E}}\text{X}$  concepts.



Figure 2: Schematic of the files in Luaotfload



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