The luaotfload package

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Abstract

This package is an adaptation of the ConTeXt font loading system. It allows for loading OpenType fonts with an extended syntax and adds support for a variety of font features.

Contents

I	Pack	age Description	2
1	Intro	oduction	2
2	Thar	nks	2
3		ding Fonts	3
	3.1	Prefix – the luaotfload Way	3
	3.3	Examples	
		8 7	4
		3.3.2 Loading by Font Name	
		3.3.3 Modifiers	5
4	Font	t features	5
5	Font	t names database	8
	5.1	luaotfload-tool / mkluatexfontdb.lua	
	5.2	Search Paths	
	5.3	Querying from Outside	
	5.4	Blacklisting Fonts	1(
6	Files	s from ConTEXt and LuaTEX-Fonts	10
7	Aux	iliary Functions	12
	7.1	Callback Functions	13
		7.1.1 Compatibility with Earlier Versions	
		7.1.2 Patches	
	7.2	Package Author's Interface	14

	7.2.1 Font Properties	
	7.2.2 Database	15
8	Troubleshooting	15
II	Implementation	15
9	luaotfload.lua	15
	9.1 Module loading	17
	9.2 Preparing the Font Loader	
	9.3 Callbacks	21
	9.4 ConTEXt override	24
10	luaotfload.sty	25
11	The GNU GPL License v2	29

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 Indic¹ 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 XETEX engine.

Unlike XaTeX, LuaTeX 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 LuaTeX 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 LuaETEX, the community-driven project to provide a foundation for using the ETEX format with the full capabilites of the LuaTEX engine. As such, the distinction between end users, contributors, and project maintainers is intentionally kept less strict, lest we unduly personalize the common effort.

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

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 Lagar 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.

3 Loading Fonts

luaotfload supports an extended font request syntax:

```
font foo={\langle prefix \rangle : \langle font \ name \rangle : \langle font \ features \rangle} \langle T_{EX} \ font \ features \rangle
```

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 = \langle prefix \rangle : \langle fontname \rangle ...
```

where $\langle prefix \rangle$ 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 XATEX 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-TEX way. There are again two modes: bracketed and unbracketed. A bracketed request looks as follows.

```
font\fontname = [\langle path\ to\ file \rangle]
```

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 = \langle font \ name \rangle \dots
```

Unbracketed (or, for lack of a better word: *anonymous*) font requests resemble the conventional TeX syntax. However, they have a broader spectrum of possible interpretations: before anything else, luaotfload attempts to load a traditional TeX 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 (*font name*).

Furthermore, luaotfload supports the slashed (shorthand) font style notation from X Π EX.

```
font = \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 X₃T_EX engine and have no meaning in LuaT_EX.

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*² in its condensed variant can be loaded as follows:

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

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

```
\font\gfsporson="[/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

²http://jmn.pl/antykwa-poltawskiego/, also available in in TeX Live.

Which fits nicely with the whole set:

```
\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* family³ 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={\langle prefix \rangle : \langle font name \rangle : \langle font features \rangle} \langle TeX font features \rangle}
```

If style modifiers are present (XATEX style), they must precede (font features).

The element $\langle font\ features \rangle$ is a semicolon-separated list of feature tags⁴ and font options. Prepending a font feature with a + (plus sign) enables it, whereas a - (minus) disables it. For instance, the request

³http://jmn.pl/kurier-i-iwona/, also in TeX Live.

 $^{^4}Cf.\ http://www.microsoft.com/typography/otspec/featurelist.htm.$

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 TeX 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 TeX'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;⁵ the default value is dlft. Some fonts, including very popular ones by foundries like Adobe, do not assign features to the dflt script, in which case the script needs to be set explicitly.

language

An OpenType language system identifier, defaulting to dflt.

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

⁵See 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.

⁶Cf. 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.⁷

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.⁸ For both, only the set default is predefined.

For example, to enable default protrusion⁹:

\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 TFX 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:

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

⁷Cf. http://www.adobe.com/devnet/opentype/afdko/topic_feature_file_syntax.html.

⁸For 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

at some point after loading luaotfload.sty.

⁹You also need to set pdfprotrudechars=2 and pdfadjustspacing=2 to activate protrusion and expansion, respectively. See the pdfTpX manual for details.

```
" " - ---

- --- ; !
```

itle Computes italic correction values (active by default).

5 FONT NAMES DATABASE

As mentioned above, luaotfload keeps track of which fonts are available to LuaTeX 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.¹¹

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.lua¹²

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.¹³ Invoked with the argument --update it will perform a database update, scanning for fonts not indexed.

luaotfload-tool --update

¹⁰These contain the feature set trep of earlier versions of luaotfload.

Note to XATEX users: this is the equivalent of the assignment mapping=text-tex using XATEX's input remapping feature.

¹¹The tool offinfo (comes with TEX Live), when invoked on a font file with the -i option, lists the variety of name fields defined for it.

 $^{^{12}\}mbox{The script}$ may be named just mkluatexfontdb in your distribution.

¹³Tests by the maintainer show only marginal performance gain by running with Luigi Scarso's LuajitTEX, 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.

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

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.

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 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 14

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).¹⁵

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, 16 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:

6 FILES FROM CONTEXT AND LUATEX-FONTS

luaotfload relies on code originally written by Hans Hagen¹⁷ 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,

¹⁴In T_FX Live: texmf-dist/doc/luatex/base/luatexref-t.pdf.

¹⁵Or see luaotfload-tool.rst in the source directory.

¹⁶You may have to run mktexlsr if you created a new file in your texmf tree.

¹⁷The creator of the ConTeXt format.

self-contained blob. In this form the font loader has no further dependencies¹⁸ and requires only minor adaptions 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 had to be manually spotted and extracted from the ConTeXt 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 28 for a graphical representation of the dependencies. From LuaTeX-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 too developed by Hans Hagen. 19 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.

```
- 1-lua.lua - 1-io.lua
- 1-lpeg.lua - 1-file.lua
- 1-function.lua - 1-boolean.lua
- 1-string.lua - 1-math.lua
- 1-table.lua - util-str.lua
```

The font loader itself. These files have been written for LuaTeX-Fonts and they are
distributed along with luaotfload.

• Code related to font handling and node processing, taken directly from ConTrXt.

 $^{^{18}\}mbox{It}$ covers, however, to some extent the functionality of the lualibs package.

¹⁹mtx-package is part of ConTeXt 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 ConTeXt.

- font-def.lua

Note that if luaoffload cannot locate the merged file, it will load the individual Lua libraries instead. Their names remain the same as in ConTeXt (without the otfl-prefix) 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.²⁰ There is a make target glyphs that will create a fresh glyph list so we don't need to import it from ConTpXt 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 ConTpXt;
- luaotfload-lib-dir.lua 1-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 Auxiliary Functions

With release version 2.2, luaotfload received additional functions for package authors to call from outside (see the file luaotfload-auxiliary.lua for details). The purpose of this addition twofold. Firstly, luaotfload failed to provide a stable interface to internals in the past which resulted in an unmanageable situation of different packages abusing the raw access to font objects by means of the *patch_font* callback. When the structure of the font object changed due to an update, all of these imploded and several packages had to be fixed while simultaneously providing fallbacks for earlier versions. Now the patching is done on the luaotfload side and can be adapted with future modifications to font objects

²⁰See 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.

without touching the packages that depend on it. Second, some the capabilities of the font loader and the names database are not immediately relevant in luaotfload itself but might nevertheless be of great value to package authors or end users.

Note that the current interface is not yet set in stone and the development team is open to suggestions for improvements or additions.

7.1 Callback Functions

The *patch_font* callback is inserted in the wrapper luaotfload provides for the font definition callback (see below, page 24). At this place it allows manipulating the font object immediately after the font loader is done creating it. For a short demonstration of its usefulness, here is a snippet that writes an entire font object to the file fontdump.lua:

```
\input luaotfload.sty
\directlua{
  local dumpfile = "fontdump.lua"
  local dump_font = function (tfmdata)
      local data = table.serialize(tfmdata)
      io.savedata(dumpfile, data)
  end

luatexbase.add_to_callback(
   "luaotfload.patch_font",
      dump_font,
      "my_private_callbacks.dump_font"
  )
}
\font\dumpme=name:Iwona
\bye
```

Beware: this creates a Lua file of around 150,000 lines of code, taking up 3 MB of disk space. By inspecting the output you can get a first impression of how a font is structured in LuaTeX 's memory, what elements it is composed of, and in what ways it can be rearranged.

7.1.1 Compatibility with Earlier Versions

As has been touched on in the preface to this section, the structure of the object as returned by the fontloader underwent rather drastic changes during different stages of its development, and not all packages that made use of font patching have kept up with every one of it. To ensure compatibility with these as well as older versions of some packages, luaotfload sets up copies of or references to data in the font table where it used to be located. For instance, important parameters like the requested point size, the units factor, and the font name have again been made accessible from the toplevel of the table even though they were migrated to different subtables in the meantime.

7.1.2 Patches

These are mostly concerned with establishing compatibility with X-TFX.

- set_sscale_dimens
 Calculate \fontdimens 10 and 11 to emulate XATEX.
- set_capheight Calculates \fontdimen 8 like XATEX.
- patch_cambria_domh
 Correct some values of the font *Cambria Math*.

7.2 Package Author's Interface

As LuaTeX release 1.0 is nearing, the demand for a reliable interface for package authors increases.

7.2.1 Font Properties

Below functions mostly concern querying the different components of a font like for instance the glyphs it contains, or what font features are defined for which scripts.

- aux.font_has_glyph (id : int, index : int)
 Predicate that returns true if the font id has glyph index.
- aux.slot_of_name(name : string)
 Translates an Adobe Glyph name to the corresponding glyph slot.
- aux.name_of_slot(slot: int)
 The inverse of slot_of_name; note that this might be incomplete as multiple glyph names may map to the same codepoint, only one of which is returned by name_of_slot.
- aux.provides_script(id : int, script : string)
 Test if a font supports script.
- aux.provides_language(id : int, script : string, language : string)
 Test if a font defines language for a given script.
- aux.provides_feature(id : int, script : string, language : string, feature : string)
 Test if a font defines feature for language for a given script.
- aux.get_math_dimension(id : int, dimension : string)
 Get the dimension dimension of font id.
- aux.sprint_math_dimension(id : int, dimension : string)
 Same as get_math_dimension(), but output the value in scaled points at the TEX end.

7.2.2 Database

• aux.scan_external_dir(dir : string)
Include fonts in directory dir in font lookups without adding them to the database.

8 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 dflt 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;
```

Another strategy that helps avoiding problems is to not access raw LuaT_EX internals directly. Some of them, even though they are dangerous to access, have not been overridden or disabled. Thus, whenever possible prefer the functions in the *aux* namespace over direct manipulation of font objects. For example, raw access to the *font.fonts* table like:

```
local somefont = font.fonts[2]
```

can render already defined fonts unusable. Instead, the function <code>font.getfont()</code> should be used because it has been replaced by a safe variant.

II Implementation

9 luaotfload.lua

This file initializes the system and loads the font loader. To minimize potential conflicts between other packages and the code imported from ConTeXt, 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 initilization. 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 LuaTeX-Fonts self-contained and encapsulate it, and especially due to his willingness to incorporate our suggestions.

```
1 luaotfload
                             = luaotfload or {}
2local luaotfload
                             = luaotfload
4 config
                                   = config or { }
5 config.luaotfload
                                   = config.luaotfload or { }
                                                                        or "normal"
6----.luaotfload.resolver
                                   = config.luaotfload.resolver
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_linebreak_filter"
12 --luaotfload.prefer_merge
                               = config.luaotfload.prefer_merge or true
13
14 luaotfload.module = {
15
     name
               = "luaotfload",
16
     version
                   = 2.2,
                  = "2013/05/20",
     date
17
     description = "OpenType layout system.",
18
     author = "Elie Roux & Hans Hagen",
19
                   = "Elie Roux",
20
     copyright
     license
                   = "GPL v2.0"
21
22 }
23
24 local luatexbase = luatexbase
                        = type, next
26 local type, next
27 local setmetatable
                        = setmetatable
28 local find_file
                        = kpse.find_file
29 local lfsisfile
                        = lfs.isfile
                        = string.find
30 local stringfind
31 local stringformat
                       = string.format
32 local stringmatch
                        = string.match
33 local stringsub
                        = string.sub
35 local add_to_callback, create_callback =
       luatexbase.add_to_callback, luatexbase.create_callback
37 local reset_callback, call_callback =
       luatexbase.reset_callback, luatexbase.call_callback
40 local dummy_function = function () end
```

```
42 local error, warning, info, log =
43 luatexbase.provides_module(luaotfload.module)
44
45 luaotfload.error = error
46 luaotfload.warning = warning
47 luaotfload.info = info
48 luaotfload.log = log
```

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.²¹

```
51 local luatex_version = 76
53 if tex.luatexversion < luatex_version then
      warning("LuaTeX v%.2f is old, v%.2f is recommended.",
54
               tex.luatexversion/100,
55
56
               luatex_version /100)
57
      --- we install a fallback for older versions as a safety
      if not node.end_of_math then
          local math_t
                                = node.id"math"
          local traverse_nodes = node.traverse_id
60
          node.end_of_math = function (n)
61
              for n in traverse_nodes(math_t, n.next) do
62
63
                  return n
              end
65
          end
66
      end
67 end
68
```

9.1 Module loading

We load the files imported from ConTeXt with this function. It automatically prepends the prefix luaotfload- to its argument, so we can refer to the files with their actual ConTeXt name.

```
69
70 local fl_prefix = "luaotfload" -- "luatex" for luatex-plain
71 local loadmodule = function (name)
72    require(fl_prefix .."-"..name)
73 end
74
```

Before TeXLive 2013 version, Lua TeX had a bug that made ofm fonts fail when called with their extension. There was a side-effect making ofm totally unloadable when luaotfload

²¹See 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.

was present. The following lines are a patch for this bug. The utility of these lines is questionable as they are not necessary since TeXLive 2013. They should be removed in the next version.

```
75 local Cs, P, lpegmatch = lpeg.Cs, lpeg.P, lpeg.match
77 local p_dot, p_slash = P".", P"/"
                  = (p_dot * (1 - p_dot - p_slash)^1 * P(-1)) / ""
78 local p_suffix
79 local p_removesuffix = Cs((p_suffix + 1)^1)
81 local find_vf_file = function (name)
      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
86
      if fullname then
87
          log("loading virtual font file %s.", fullname)
88
89
      return fullname
90
91 end
```

9.2 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 LuaTeX-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 ConTeXt 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.

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

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*.²² The attribute identifiers are prefixed "luaotfload@" to avoid name clashes.

99 100 **do**

```
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
112
           return number
113
       end
114 end
115
These next lines replicate the behavior of luatex-fonts.lua.
117 local context_environment = { }
119 local push_namespaces = function ()
      log("push namespace for font loader")
120
      local normalglobal = { }
121
      for k, v in next, \_G do
122
           normalglobal[k] = v
123
124
      end
125
      return normalglobal
126 end
127
128 local pop_namespaces = function (normalglobal, isolate)
       if normalglobal then
129
130
           local _G = _G
           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
                    end
139
140
               end
           end
141
           for k, v in next, normalglobal do
142
```

 $^{^{22}\}mathrm{Many}$ thanks, again, to Hans Hagen for making this part configurable!

```
G[k] = v
143
           end
144
           -- just to be sure:
145
146
           setmetatable(context_environment,_G)
147
           log("irrecoverable error during pop_namespace: no globals to restore")
148
149
           os.exit()
150
       end
151 end
152
153 luaotfload.context_environment = context_environment
154 luaotfload.push_namespaces
                                    = push_namespaces
155 luaotfload.pop_namespaces
                                    = pop_namespaces
157 local our_environment = push_namespaces()
The font loader requires that the attribute with index zero be zero. We happily oblige.
(Cf. luatex-fonts-nod.lua.)
159
160 tex.attribute[0] = 0
Now that things are sorted out we can finally load the fontloader.
163 loadmodule"merged.lua"
164---loadmodule"font-odv.lua" --- <= Devanagari support from Context
165
166 if fonts then
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]]
175
           log[[ supported as it is a frozen instance. Problems can be]]
           log[[ reported to the ConTeXt mailing list."]]
176
177
       end
       fonts._merge_loaded_message_done_ = true
178
179
180 else--- the loading sequence is known to change, so this might have to
      --- be updated with future updates!
181
       --- do not modify it though unless there is a change to the merged
182
       --- package!
183
      loadmodule("1-lua.lua")
184
       loadmodule("1-lpeg.lua")
185
       loadmodule("1-function.lua")
186
       loadmodule("l-string.lua")
```

```
loadmodule("1-table.lua")
188
       loadmodule("1-io.lua")
189
       loadmodule("1-file.lua")
190
       loadmodule("1-boolean.lua")
191
192
       loadmodule("1-math.lua")
       loadmodule("util-str.lua")
193
       loadmodule('luatex-basics-gen.lua')
194
195
       loadmodule('data-con.lua')
       loadmodule('luatex-basics-nod.lua')
196
       loadmodule('font-ini.lua')
197
       loadmodule('font-con.lua')
198
       loadmodule('luatex-fonts-enc.lua')
       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
207
       loadmodule('node-inj.lua')
       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
212
       loadmodule('font-def.lua')
       loadmodule('luatex-fonts-def.lua')
213
       loadmodule('luatex-fonts-ext.lua')
214
       loadmodule('luatex-fonts-cbk.lua')
215
216 end --- non-merge fallback scope
217
```

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.

```
218
219 pop_namespaces(our_environment, false)-- true)
220
221 log("fontloader loaded in %0.3f seconds", os.gettimeofday()-starttime)
222
```

9.3 Callbacks

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

```
223
224 callback.register = trapped_register
225
```

We do our own callback handling with the means provided by luatexbase. Note: pre_linebreak_filter and hpack_filter are coupled in ConTEXt in the concept of node processor.

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

Now we load the modules written for luaotfload.

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

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 X₁T_EX emulation layer and the genuine name: and file: lookups of LuaT_EX-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).

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

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.

```
252
253 local resolvefile = fonts.names.crude_file_lookup
254 --local resolvefile = fonts.names.crude_file_lookup_verbose
255
256 function request_resolvers.file(specification)
       local name
                     = resolvefile(specification.name)
257
       local suffix = file.suffix(name)
258
259
       if formats[suffix] then
           specification.forced = suffix
260
                                  = file.removesuffix(name)
261
           specification.name
262
       else
           specification.name = name
263
264
       end
265 end
266
267
```

We classify as anon: those requests that have neither a prefix nor brackets. According to Khaled²³ they are the X-TeX equivalent of a name: request, so we will be treating them as such.

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

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 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.

```
272 local type1_formats = { "tfm", "ofm", }
273
274 request_resolvers.anon = function (specification)
275
       local name = specification.name
276
       for i=1, #type1_formats do
           local format = type1_formats[i]
           if resolvers.findfile(name, format) then
278
               specification.name = file.addsuffix(name, format)
279
               return
280
           end
281
282
       end
283
       --- under some weird circumstances absolute paths get
       --- passed to the definer; we have to catch them
285
       --- before the name: resolver misinterprets them.
       name = specification.specification
286
       local exists, _ = lfsisfile(name)
287
       if exists then --- garbage; we do this because we are nice,
288
```

 $^{^{23} \}verb|https://github.com/phi-gamma/lua otfload/issues/4\#issuecomment-17090553.$

```
--- not because it is correct
289
           logs.names_report("log", 1, "load", "file "%s" exists", name)
290
           logs.names_report("log", 1, "load",
291
             "... overriding borked anon: lookup with path: lookup")
292
293
           specification.name = name
           request_resolvers.path(specification)
294
           return
295
296
297
       request_resolvers.name(specification)
298 end
299
```

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.

```
300
301 request_resolvers.path = function (specification)
                        = specification.name
302
       local name
       local exists, _ = lfsisfile(name)
303
304
       if not exists then -- resort to file: lookup
           logs.names_report("log", 1, "load",
305
             "path lookup of "%s" unsuccessful, falling back to file:",
306
307
           request_resolvers.file(specification)
308
       else
309
         local suffix = file.suffix(name)
310
         if formats[suffix] then
311
312
           specification.forced = suffix
313
           specification.name
                                  = file.removesuffix(name)
         else
314
           specification.name = name
315
316
         end
317
       end
318 end
```

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.

```
320
321 create_callback("luaotfload.patch_font", "simple", dummy_function)
322
```

9.4 ConT_EXt override

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

```
323
324 local read_font_file = fonts.definers.read
325
326 --- spec -> size -> id -> tmfdata
```

```
327 local patch_defined_font = function (specification, size, id)
       local tfmdata = read_font_file(specification, size, id)
328
       if type(tfmdata) == "table" and tfmdata.shared then
329
           --- We need to test for the "shared" field here
330
331
           --- or else the fontspec capheight callback will
           --- operate on tfm fonts.
332
           call_callback("luaotfload.patch_font", tfmdata)
333
334
       return tfmdata
335
336 end
337
338 reset_callback("define_font")
Finally we register the callbacks.
340
341 local font_definer = config.luaotfload.definer
342
343 if font_definer == "generic" then
    add_to_callback("define_font",
344
345
                     fonts.definers.read,
                      "luaotfload.define_font",
346
347
                     1)
348 elseif font_definer == "patch" then
    add_to_callback("define_font",
350
                     patch_defined_font,
                      "luaotfload.define_font",
351
352
                     1)
353 end
354
355 loadmodule"features.lua"
                                --- contains what was "font-ltx" and "font-otc"
356 loadmodule"extralibs.lua"
                                --- load additional Context libraries
357 loadmodule"auxiliary.lua"
                                --- additionaly high-level functionality (new)
359 -- vim:tw=71:sw=4:ts=4:expandtab
360
luaotfload.sty
Classical Plain+ETeX package initialization.
361 \csname ifluaotfloadloaded\endcsname
362 \let\ifluaotfloadloaded\endinput
363 \bgroup\expandafter\expandafter\expandafter\egroup
364 \expandafter\ifx\csname ProvidesPackage\endcsname\relax
   \input luatexbase.sty
365
366 \else
    \NeedsTeXFormat{LaTeX2e}
    \ProvidesPackage{luaotfload}%
368
       [2013/05/20 v2.2c OpenType layout system]
369
```

10

```
370 \RequirePackage{luatexbase}
371 \fi
```

372 \ifnum\luatexversion<76

- 373 %% here some deprecation warning would be in order
- 374 \RequireLuaModule{lualibs}
- 375 \RequireLuaModule{luaotfload-legacy}

376 \else

- 377 \RequireLuaModule{luaotfload}
- 378∖**fi**
- 379 \endinput

```
\langle definition \rangle
                                                  ::= '\font', CSNAME, '=', \langle font request \rangle, [\langle size \rangle];
\langle size \rangle
                                                   ::= 'at', DIMENSION;
                                                   ::= '"', \langle unquoted font \ request \rangle '"'
⟨font request⟩
                                                         '{', \(\langua\) unquoted font request\(\rangle\)'}'
                                                         ⟨unquoted font request⟩;
⟨unquoted font request⟩
                                                   ::= \(\langle specification \rangle, \left(':', \langle feature list \rangle \right)\)
                                                         [', \langle path \ lookup \rangle \ ']', [[':'], \langle feature \ list \rangle ];
                                                   := \langle prefixed \ spec \rangle, [\langle subfont \ no \rangle], \{\langle modifier \rangle\}
\langle specification \rangle
                                                         \langle anon\ lookup \rangle, { \langle modifier \rangle };
⟨prefixed spec⟩
                                                   ::= 'file:', \langle file lookup\rangle
                                                        'name:', \langle name\ lookup \rangle;
⟨file lookup⟩
                                                  := \{ \langle name\ character \rangle \};
⟨name lookup⟩
                                                  := \{ \langle name\ character \rangle \};
⟨anon lookup⟩
                                                  ::= TFMNAME | \langle name lookup \rangle;
⟨path lookup⟩
                                                  ::= { ALL_CHARACTERS - ']' };
                                                  ::= '/', ('I' | 'B' | 'BI' | 'IB' | 'S=', { DIGIT } );
\langle modifier \rangle
                                                  ::= '(', { DIGIT }, ')';
⟨subfont no⟩
                                                  ::= \langle feature \ expr \rangle, \{ '; ', \langle feature \ expr \rangle \};
⟨feature list⟩
⟨feature expr⟩
                                                   ::= FEATURE ID, '=', FEATURE VALUE
                                                   | \(\feature\) switch\), FEATURE_ID;
                                                  ::= '+' | '-';
⟨ feature switch⟩
                                                  ::= ALL_CHARACTERS - ( '(' | '/' | ':');
⟨name character⟩
```

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: *FEATURE_ID* for a valid font feature name and *FEATURE_VALUE* for the corresponding value. *TFMNAME* is the name of a *TFM* file. *DIGIT* again refers to bytes 48–57, and *ALL_CHARACTERS* to all byte values. *CSNAME* and *DIMENSION* are the TeX concepts.

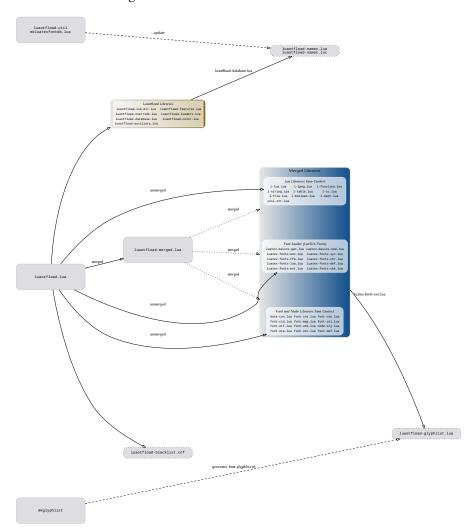


Figure 2: Schematic of the files in Luaotfload

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