biber

A backend bibliography processor for biblatex

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1 Introduction

1.1 About

biber is conceptually a bibtex replacement for biblatex. It is written in Perl with the aim of providing a customised and sophisticated data preparation backend for biblatex. Functionally, it offers a superset of bibtex's capabilities but is tightly coupled with biblatex and cannot be used as a stand-alone tool with standard .bst styles.

1.2 Requirements

biber is distributed in two ways. There is a Perl source version which requires you to have a working Perl installation (preferably version 5.12 but no less than 5.10) and the ability to install the pre-requisite modules. Also provided are binaries for major OSes built with the Perl PAR: : Packer module and utilities.

Currently there are binaries available for:

- OSX Intel 64-bit
- Windows

- Linux 32-bit
- Linux 64-bit

These should work on any fairly recent OS version. Both binaries and Perl source are available on SourceForge¹.

1.3 License

biber is released under the free software Artistic License 2.0²

1.4 History

bibtex has been the default (only ...) integrated choice for bibliography processing in TeX for a long time. It has well known limitations which stem from its data format, data model and lack of Unicode support³. The .bst language for writing bibliography styles is painful to learn and use. It is not a general programming language and this makes it really very hard to do sophisticated automated processing of bibliographies.

biblatex was a major advance for LaTeX users as it moved much of the bibliography processing into LaTeX macros. However, biblatex still used bibtex as a sorting engine for the bibliography and also to generate various labels for entries. bibtex's capabilities even for this reduced set of tasks was still quite restricted due to the lack of Unicode support and the more and more complex programming issues involved in label preparation and file encoding.

biber was designed specifically for biblatex in order to provide a powerful backend engine which could deal with any required tasks to do with .bbl preparation. It can

- Deal with the full range of UTF-8
- Sort in a completely customisable manner, using when available, CLDR collation tailorings
- Automatically encode the .bbl into any supported encoding format⁴
- Process all bibliography sections in one pass of the tool
- Handle UTF-8 citekeys and filenames (given a suitable fully UTF-8 compliant TeX engine)
- Handle very complex auto-expansion and contraction of names and namelists.
- Lots of other things

¹http://sourceforge.net/projects/biblatex-biber/

²http://www.opensource.org/licenses/artistic-license-2.0.php

³In fact, there is now a Unicode version

⁴'Supported' here means encodings supported by the Perl Encode module

1.5 Acknowledgements

François Charette originally wrote biber. Philip Kime joined in the development in 2009.

2 Use

Firstly, running biber —help will display all options and a brief description of each. This is the most useful brief source of usage information. biber returns an exit code of 0 on success or 1 if there was an error.

Most biber options can be specified in long or short format. When mentioning options below, they are referred to as 'long form|short form' when an option has both a long and short form. As usual with such options, when the option requires an argument, the long form is followed by an equals sign '=' and then the argument, the short form is followed by a space and then the argument. For example, the --bibdata|-d option can be given in two ways:

```
biber --bibdata=somefile.bib
biber -d somefile.bib
```

With the backend=biber option, biblatex switches its backend interface and passes all options and information relevant to biber's operation in a control file with extension .bcf⁵. This is conceptually equivalent to the .aux file which LaTeX uses to pass information to bibtex. The .bcf file is XML and contains many options and settings which configure how biber is to process the bibliography and generate the .bbl file.

The usual way to call biber is simply with the .bcf file as the only argument. The '.bcf' extension of the control file is not optional. biblatex always outputs a control file with the .bcf extension. Specifying the '.bcf' extension to biber is optional. Assuming a control file called test.bcf, the following two commands are equivalent:

```
biber test.bcf
biber test
```

2.1 Options and config file

biber sets its options using the following resource chain which is given in decreasing precedence order:

⁵BibLaTeX Control File

```
command line options \rightarrow .bcf file\rightarrow biber.conf file \rightarrow biber hard-coded defaults
```

Users do not need to care directly about the contents or format of the .bcf file as this is generated from the options which they specify for biblatex. To override the .bcf options or to provide option settings when no .bcf file is used (see for example the --allentries | -a and --bibdata | -d options), users may use either a configuration file or the command line to set options.

The configuration file is by default called biber.conf but this can be changed using the --configfile|-g option. Unless --configfile|-g is used, the config file is looked for in the following places, in decreasing order of preference:

```
biber.conf in the current directory →
$HOME/.biber.conf →
$XDG_CONFIG_HOME/biber/biber.conf →
$HOME/Library/biber/biber.conf (Mac OSX only)
$APPDATA/biber.conf (Windows only) →
the output of kpsewhich biber.conf (if available on the system)
```

The config file format is a very flexible one which allows users to specify options in most common formats, even mixed in the same file. It's easier to see an example. Here is a config file which displays the biber hard-coded defaults:

```
allentries
bibdata
                         undef
                        bibtex
bibdatatype
bblencoding
                        UTF-8
bibencoding
                        UTF-8
collate
                          1
<collate options>
     level
                          3
</collate options>
                          0
debug
                          0
fastsort
mincrossrefs
                          2
nolog
\begin{array}{ll} \mbox{nosortdiacritics} & [\x{2bf}\x{2018}] \\ \mbox{nosortprefix} & \p{L}{2}\p{Pd} \end{array}
```

```
0
onlylog
quiet
                     0
sortcase
                     true
sortlocale
                     en US.utf8
                     true
sortupper
trace
validate control
                     0
validate structure
                     0
wraplines
```

You can see here that options with multiple key/value pairs of their own like <code>--collate_options|-c</code> can be specified in Apache config format. Please see the documentation for the <code>Config::General</code> Perl module⁶ if you really need details. In practise, if you use a config file at all for <code>biber</code>, it will contain very little as you will usually set all options by setting options in <code>biblatex</code> which will pass them to <code>biber</code> via the <code>.bcf</code> file.

The --collate_options | -c option takes a number of key/value pairs as value. See section 2.4 for details. The value of the nosort* options can only be set in the config file and not on the command line. This is because the values are Perl regular expressions and would need special quoting to set on the command line. This can get a bit tricky on some OSes (like Windows) so it's safer to set them in the config file. In any case, it's unlikely you would want to set them for particular biber runs; they would more likely be set as your personal default and thus they would naturally be set in the config file anway. They specify stand-alone diacritic marks and name prefices to strip before sorting takes place and are designed to deal with cases like

```
author = \{\{al-Hasan\}, `Alī\},
```

where the prefix 'al-' and the diacritic 'c' should not be considered when sorting.

2.2 Input/Output File Locations

2.2.1 Control file

The control file is normally passed as the only argument to biber (unless using --allentries|-a and --bibdata|-d). It is searched for using the following locations, in decreasing order of priority:

```
Absolute filename →
In the --output_directory, if specified→
```

⁶http://search.cpan.org/search?query=Config::General&mode=all

Relative to current directory→ Using kpsewhich, if available

2.2.2 Database files

Bibliography database files are searched for using the same rule as for control files (see section 2.2.1 above). Unless using the --bibdata|-d option, users usually do not specify explicitly the bibliography database files; they are normally passed in the .bcf control file, taken from the biblatex \bibliography{} command arguments.

2.3 Logfile

By default, the logfile for biber will be named \jobname.blg, so, if you run

```
biber <options> test.bcf
```

then the logfile will be called 'test.blg'. Like the .bbl output file, it will be created in the --output_directory|-c, if this option is defined. If there is no .bcf file on the command line (for example, when using the --allentries|-a and --bibdata|-d options), then the logfile name will default to 'biber.blg'. You can override the logfile name by using the --logfile option:

```
biber --logfile=lfname test.bcf
```

results in a logfile called 'lfname.blg'.

2.4 Collation and Localisation

biber takes care of collating the bibliography for biblatex. It writes entries to the .bbl file sorted by a completely customisable set of rules which are passed in the .bcf file by biblatex. biber has two ways of performing collation:

```
--collate|-C
```

The default. This option makes biber use the Unicode::Collate module for collation which implements the full UCA (Unicode Collation Algorithm). It also has CLDR (Common Locale Data Repository) tailoring to deal with cases which are not covered by the UCA. It is a little slower than --fastsort|-f but the advantages are such that it's rarely worth using --fastsort|-f

```
--fastsort|-f
```

Biber will sort using the OS locale collation tables. The drawback for this method is that special collation tailoring for various languages are not implemented in the collation tables for many OSes. For example, few OSes correctly sort 'å' before 'ä' in the Swedish (sv_SE) locale. If you are using a common latin alphabet, then this is probably not a problem for you.

The locale used for collation is determined by the following resource chain which is given in decreasing precedence order:

```
--collate_options|-c(e.g. -c 'locale => "de_DE"') →
--sortlocale|-l →

LC_COLLATE environment variable →

LANG environment variable →

LC_ALL environment variable
```

With the default <code>--collate|-C</code> option, the locale will be used to look for a collation tailoring for that locale. It will generate an informational warning if it finds none. This is not a problem as the vast majority of collation cases are covered by the standard UCA and many locales neither have nor need any special collation tailoring.

With the --fastsort|-f option, the locale will be used to locate an OS locale definition to use for the collation. This may or may not be correctly tailored, depending on the locale and the OS.

Collation is by default case sensitive. You can turn this off using the biber option --sortcase=false or from biblatex using its option sortcase=false.

--collate | -C by default collates uppercase before lower. You can reverse this using the biber option --sortupper=false or from biblatex by using its option sortupper=false. Be aware though that some locales rightly enforce a particular setting for this (for example, Danish). You will be able to override it but biber will warn you if you do.

There are in fact many options to Unicode::Collate which can tailor the collation in various ways in addition to the locale tailoring which is automatically performed. Users should see the the documentation to the module for the various op-

tions, most of which the vast majority of users will never need⁷. Options are passed using the $--collate_options|-c$ option as a single quoted string, each option separated by comma, each key and value separated by '=>'. See examples.

2.4.1 Examples

biber

Call biber using all settings from the .bcf generated from the LaTeX run. Case sensitive UCA sorting is performed taking the locale for tailoring from the environment if no sortlocale is defined in the .bcf

biber --sortlocale=de DE

Override any locale setting in the .bcf or the environment.

biber --fastsort

Use slightly quicker internal sorting routine. This uses the OS locale files which may or may not be accurate.

biber --sortcase=false

Case insensitive sorting.

biber --sortupper=false --collate options="backwards => 2"

Collate lowercase before upper and collate French accents in reverse order at UCA level 2.

2.5 Encoding of files

biber takes care of reencoding the .bib data as necessary. In normal use, biblatex passes its bibencoding option value to biber via the .bcf file. It also passes an option bblencoding the value of which is derived from the inputenc package setting (if the user is using this package), otherwise 'utf8' (for XeTeX or LuaTeX) or 'ascii' (any other TeX engine).

biber performs the following tasks:

- 1. Decodes the .bib into UTF-8 if it is not UTF-8 already
- 2. Decodes LaTeX character macros into UTF-8
- 3. Encodes the output so that the .bbl is in the encoding that bblencoding specifies
- 4. Warns if it is asked to output to the .bbl any UTF-8 decoded LaTeX character macros which are not in the bblencoding encoding. Replaces with a diacritic-stripped substitute

As you can see from item 2 above, by default, biber converts LaTeX character macros into UTF-8 internally. This is very useful as it means that things are sorted correctly but has two potential (but rare) problems which you should be aware of:

⁷For details on the various options, see http://search.cpan.org/search?query=Unicode% 3A%3ACollate&mode=all

- If you are using PDFLaTeX and \usepackage[utf8] {inputenc}, it is possible that the UTF-8 characters resulting from biber's internal LaTeX character macro decoding break inputenc. This is because inputenc does not implement all of UTF-8, only a commonly used subset.
 - An example—if you had \DJ in your .bib, biber decodes this correctly to 'D' and this breaks inputenc because it doesn't understand that UTF-8 character. The solution here is to switch to a TeX engine with full UTF-8 support like XeTeX or LuaTeX as these don't use or need inputenc.
- If your bblencoding is not UTF-8, and you are using some UTF-8 equivalent LaTeX character macros in your .bib, then some .bbl fields (currently only \sortinit{}) might end up with invalid characters in them, according to the .bbl encoding. This is because some fields must be generated from the final sorting data which is only available after the LaTeX character macro decoding step.

```
For example, suppose you were using PDFLaTeX with
\usepackage[latin1] {inputenc} and the following .bib entry

@BOOK{citekey1,
    AUTHOR = {{\v S}imple, Simon},
}
```

With normal LaTeX character macro decoding, the $\{\v \ S\}$ is decoded into 'Š' and so with name-first sorting, $\sortinit\{\}$ would be 'Š'. This is an invalid character in latin1 encoding and so the .bbl would be broken. In such cases when $\sortinit\{\}$ is a char not valid in the bblencoding, biber strips off any diacritics which in this case results in 'S'. This is not ideal as this is not the initial character of the string used for sorting any more but it's a decent replacement in such cases. The solution is really to use UTF-8 bblencoding wherever possible. In extreme cases like the one above, this might also mean switching TeX engines to one that supports full UTF-8.

Normally, you do not need to set the encoding options on the biber command line as they are passed in the .bcf via the information in your biblatex environment. However, you can override the .bcf settings with the command line or config file. The resource chain for encoding settings is, in decreasing order of preference:

```
--bibencoding|-e and --bblencoding|-E \rightarrow biber config file \rightarrow .bcf control file
```

2.5.1 Examples

2.6 Limitations

Currently, users are restricted to the bibliography entry types hard-coded into biblatex. This is mitigated a little by the custom fields listed in section 2.2.4 of the bibatex manual but these are not portable or semantically obvious in their meaning. It is planned to have a customisable interface in biblatex which will allow users to define entry types an fields and have these passed through to biber which will validate the structure of the bibliography against these definitions. This would allow a fully customisable data model interface. Currently this is impossible due to a reliance on the .bib format which is quite restricted in scope and extensibility. It is likely that biblatex and biber will move to a modular data layer with an XML format as the default. .bib support will be maintained as a legacy format.

Currently it is not possible to automatically expand name lists to their minimally unique truncation which is required by some styles (APA for example). This is quite a hard problem, a solution to which is implemented in an experimental biber branch but which also needs biblatex support, envisaged for version 2.x. It requires an enhanced .bbl format, amongst other things.

2.7 Editor Integration

Here is some information on how to integrate biber into some of the more common editors

2.7.1 Emacs

Emacs has the very powerful AUcTeX mode for editing TeX and running compilations. BibTeX is already integrated into AUCTeX and it is quite simple to add support forbiber. Use the Emacs Customise interface to modify the TeX-command-list variable and add a Biber command.

```
M-x customise-variable TeX-command-list
```

and then Ins somewhere a new command that looks like Figure 1.

```
INS DEL Name: Biber

Command: biber %s

How: Value Menu Other: TeX-run-Biber

Prompt: Toggle off (nil)

Modes: Value Menu All

Menu elements:

INS DEL Lisp expression: :help

INS DEL Lisp expression: "Run Biber"
```

Figure 1: Screenshot of AUCTeX command setup for Biber

Alternatively, you can add it directly in lisp to your .emacs like this:

```
(add-to-list 'TeX-command-list
  (quote
    ("Biber" "biber %s" TeX-run-Biber nil t :help "Run Biber")))
```

However you add the command to TeX-command-list, customise the actual Biber command parameters as you want them, using "%s" as the LaTeX file name place holder. Then define the following two functions in your .emacs.

```
; Biber under AUCTeX
(defun TeX-run-Biber (name command file)
  "Create a process for NAME using COMMAND to format FILE with Biber."
 (let ((process (TeX-run-command name command file)))
    (setq TeX-sentinel-function 'TeX-Biber-sentinel)
    (if TeX-process-asynchronous
process
      (TeX-synchronous-sentinel name file process))))
(defun TeX-Biber-sentinel (process name)
  "Cleanup TeX output buffer after running Biber."
  (goto-char (point-max))
  (cond
   ;; Check whether Biber reports any warnings or errors.
   ((re-search-backward (concat
 "^(There \(?:was\)\ \\([0-9]+\\) "
 "\\(warnings?\\|error messages?\\))") nil t)
    ;; Tell the user their number so that she sees whether the
    ;; situation is getting better or worse.
```

```
(message (concat "Biber finished with %s %s. "
  "Type `%s' to display output.")
  (match-string 1) (match-string 2)
  (substitute-command-keys
    "\\<TeX-mode-map>\\[TeX-recenter-output-buffer]")))
(t
  (message (concat "Biber finished successfully. "
    "Run LaTeX again to get citations right."))))
(setq TeX-command-next TeX-command-default))
```

You'll then see a Biber option in your AUCTeX command menu or you can just C-c C-c and type Biber.

2.7.2 TeXworks

It's very easy to add biber support to TeXworks. In the Preferences, select the Typesetting tab and then add a new Processing Tool as in Figure 2.

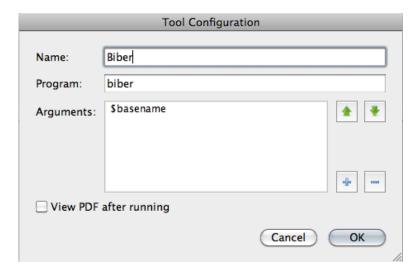


Figure 2: Screenshot of TeXworks processing tool setup for Biber

2.8 Cross-references

biblatex supports the CROSSREF field in bibliography databases and because biber performs the actual processing of such fields, it can do this in a customisable way. Currently, the customisable interface via user biblatex macros and the .bcf file is not yet implemented but the internal code in biber is ready for this. The purpose of this section is to describe the current hard-coded biber defaults.

Source	Target	Source field	\rightarrow	Target field
PROCEEDINGS	INPROCEEDINGS	TITLE SUBTITLE TITLEADDON	$\begin{array}{c} \rightarrow \\ \rightarrow \\ \rightarrow \end{array}$	BOOKTITLE BOOKSUBTITLE BOOKTITLEADDON
COLLECTION	INCOLLECTION	TITLE SUBTITLE TITLEADDON	$\begin{array}{c} \rightarrow \\ \rightarrow \\ \rightarrow \\ \rightarrow \end{array}$	BOOKTITLE BOOKSUBTITLE BOOKTITLEADDON
BOOK	INBOOK	TITLE SUBTITLE TITLEADDON AUTHOR	$\begin{array}{c} \rightarrow \\ \rightarrow \\ \rightarrow \\ \rightarrow \\ \rightarrow \end{array}$	BOOKTITLE BOOKSUBTITLE BOOKTITLEADDON BOOKAUTHOR

Table 1: Custom cross-reference mappings

By default, the cross-reference target (child) will inherit all of the source (parent) fields if they are not already defined in the target. Table 1 shows the current custom mappings which apply. These custom cross-reference mappings will overwrite the target fields, if they exist. In future, the fully customisable interface will allow:

- Choice of overwriting target fields with source fields
- Choice of whether or not to, by default, inherit all fields from the source
- Mapping of any source field to any target field
- Mapping of field(s) in any source to specific targets
- Mapping of field(s) in specific sources to any targets
- Many-to-one and one-to-many field mappings
- Skipping inheritance of specific source fields

The custom cross-reference mappings will make it possible to overcome the problems with the traditional bibtex handling of cross-references which are mentioned in section 2.4.1 of the biblatex manual. As mentioned above, only the hard-coded mappings in Table 1 are currently implemented.

3 Binaries

The binary distributions of biber are made using the Perl PAR::Packer module. They can be used as a normal binary but have some behaviour which is worth noting:

• Don't be worried by the size of the binaries. PAR::Packer essentially constructs a self-extracting archive which unpacks the needed files first and so the binaries look larger than what actually runs in memory.

On the first run of a new version (that is, with a specific hash), they actually
unpack themselves to a temporary location which varies by operating system.
This unpacking can take a little while and only happens on the first run of a
new version.

3.1 Binary Caches

PAR::Packer works by unpacking the required files to a cache location. It only does this on the first run of a binary by computing a hash of the binary and comparing it with the cache directory name which contains the hash. So, if you run several versions of a binary, you will end up with several cached trees which are never used. This is particularly true if you are regularly testing new versions of the biber binary. It is a good idea to delete the caches for older binaries as they are not needed and can take up a fair bit of space. The caches are located in a temporary location which varies from OS to OS. The cache name is:

```
par-<username>/cache-<hash> (Linux/Unix/OSX)
par-<username>\cache-<hash> (Windows)
```

The temp location is not always obvious but these are sensible places to look (where * can vary depending on user:

- /var/folders/*/*/-Tmp-/ (OSX, local GUI login shell)
- /var/tmp/ (OSX, remote ssh login shell)
- /tmp/(Linux)
- C:\Documents and Settings\<username>\Local Settings\Temp(Windows)
- C:\Windows\Temp (Windows)

To clean up, you can just remove the whole par-<username> directory/folder and then run the current binary again.

3.2 Binary Architectures

Binaries are available for the following architectures:

- linux_x86_32 Linux x86 32-bit (built on Ubuntu 9.04)
- linux x86 64 Linux x86 64-bit (built on Ubuntu 9.04)
- MSWin Windows. Should work on 32 or 64 bit (built on XP)
- darwin x86 64 OSX Intel 64-bit (built on OSX 10.6)

3.3 Installing

These instructions only apply to manually downloaded binaries. If biber came with your TeX distribution just use it as normal.

Download the binary appropriate to you OS/arch⁸. Below I assume it's on your desktop.

You have to move the binary to somewhere in you command-line or TeX utility path so that it can be found. If you know how to do this, just ignore the rest of this section which contains some instructions for users who are not sure about this.

3.3.1 OSX

If you are using the TexLive MacTeX distribution:

```
sudo mv ~/Desktop/biber /usr/texbin/
sudo chmod +x /usr/texbin/biber
```

If you are using the macports TexLive distribution:

```
sudo mv ~/Desktop/biber /opt/local/bin/
sudo chmod +x /opt/local/bin/biber
```

The 'sudo' commands will prompt you for your password.

3.3.2 Windows

The easiest way is to just move the executable into your C:\Windows directory since that is always in your path. A more elegant is to put it somewhere in your TeX distribution that is already in your path. For example if you are using MiKTeX:

```
C:\Program Files\MiKTeX 2.8\miktex\bin\
```

3.3.3 Unix/Linux

```
sudo mv ~/Desktop/biber /usr/local/bin/biber
sudo chmod +x /usr/local/bin/biber
```

Make sure /usr/local/bin is in your PATH. Search Google for 'set PATH linux' if unsure about this. There are many pages about this, for example: http://www.cyberciti.biz/faq/unix-linux-adding-path/

⁸https://sourceforge.net/projects/biblatex-biber

3.4 Building

Instructions for those who want/need to build an executable from the Perl version. For this, you will need to have a recent Perl, preferably 5.12 at least with the following modules:

- PAR
- PAR::Packer
- All biber pre-requisites

You should have the latest CPAN versions of all required modules as biber is very specific in some cases about module versions and depends on recent fixes in many cases. You can see if you have the biber Perl dependencies by the usual

```
perl ./Build.PL
```

invocation in the biber Perl distribution tree directory. Normally, the build procedure for the binaries is as follows⁹:

- Get the biber source tree from SF and put it on the architecture you are building for
- cd to the root of the source tree
- perl Build.PL (this will check your module dependencies)
- Build test
- Build install (may need to run this as sudo on UNIXesque systems)
- cd dist/<arch>
- build.sh (build.bat on Windows)

This leaves a binary called 'biber-<arch>' (also with a '.exe' extension on Windows) in your current directory. The tricky part is constructing the information for the build script. There are two things that need to be configured, both of which are required by the PAR::Packer module:

- 1. A list of modules/libraries to include in the binary which are not automatically detected by the PAR::Packer dependency scanner
- 2. A list of extra files to include in the binary which are not automatically detected by the PAR::Packer dependency scanner

To build biber for a new architecture you need to define these two things as part of constructing new build scripts:

• Make a new subfolder in the dist directory named after the architecture you are building for. This name is arbitrary but should be fairly obvious like 'solaris-sparc-64', for example.

⁹On UNIXequse systems, you may need to specify a full path to the scripts e.g. ./Build

- Copy the biber.files file from an existing build architecture into this directory.
- For all of the files with absolute pathnames in there (that is, ones we are not pulling from the biber tree itself), locate these files in your Perl installation tree and put the correct path in the file.
- Copy the build script from a vaguely similar architecture (i.e. Windows/non-Windows...) to your new architecture directory.
- Change the --link options to point to where the required libraries reside on your system.
- Change the --output option to name the resulting binary for your architecture.
- Run the build script

The <code>--link</code> options can be a little tricky sometimes. It is usually best to build without them once and then run <code>ldd</code> (or Windows equivalent) on the binary to see which version/location of a library you should link to. You can also try just running the binary and it should complain about missing libraries and where it expected to find them. Put this path into the <code>--link</code> option. The <code>--module</code> options are the same for all architectures and do not need to be modified. On architectures which have or can have case-insensitive file systems, you should use the build script from either Windows or OSX as a reference as these include a step to copy the main <code>biber</code> script to a new name before packing the binary. This is required as otherwise a spurious error is reported to the user on first run of the binary due to a name collision when it unpacks itself.