Extensis
Universal Type Server

CORE CLIENT GUIDE

Legal notices

Universal Type Server Core Client v7.0.3 // 27 August 2020

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What is the Core Client?

The Core Client is a lightweight font activation application designed to accommodate users outside the design and editorial communities. It works with Universal Type Server to automatically activate specific sets of fonts when a user logs in to their computer, prevent unauthorized font activation, and keep all users in compliance with available font licenses.

Core Client allows the user to choose to activate Startup Sets in any single workgroup, or in all of their workgroups.

Core Client key advantages:

- **Compliance:** Keeps every computer in your organization licensed and legal.
- **Consistency:** Organize and distribute fonts to all users across the organization to ensure consistency.
- **Prevention:** Close the holes and prevent users from introducing rogue fonts onto their systems and into the workflow.

When the Core Client starts, it activates all fonts in the Startup Sets that are in the selected workgroup.

The Core Client also enforces the System Font Policy specified for the user. The administrator can designate which fonts are allowed in the user's System Fonts, and if the user attempts to install other fonts they will be automatically removed (Mac) or deactivated (Windows).

Preparing for the Core Client

To prepare your Universal Type Server and user systems for the Core Client, you will need to do the following:

1. Ensure that your Universal Type Server license includes the Core Client. See *Licensing the Core Client* below.
2. Download the Core Client installers. See *Downloading the installers* below.
3. Confirm that user systems meet the Core Client system requirements. See *System requirements* on the next page.
4. Create Core Client user accounts using the Management application. See *User accounts* on the next page.
5. Create Startup Sets using Universal Type Client. See *Creating Startup Sets* on page 7.
6. Install the Core Client. See *Installing the Core Client* on page 8.

> **IMPORTANT:** Do not install the Core Client on a system with Universal Type Client.

Licensing the Core Client

The Core Client is licensed on a per-seat basis, and requires the Enterprise Edition of Universal Type Server.

You activate and review Universal Type Server licenses in the Management application. Your Universal Type Server system needs to connect to the Internet to validate your license and add-ons.

To determine if you have a license for Core Client connections, log in to the Management application, click the **Administration** tab, then click **Licenses**.

If you need to purchase licenses for the Enterprise Edition or the Core Client, contact Extensis Sales.

Once you have purchased an additional feature for Universal Type Server, you need to update your license:

1. Open the Management application.
2. Click the **Administration** tab, then click **Licenses**.
3. Click **Remove**, then click **OK**.
4. Click **Activate Universal Type Server**.
5. Enter the credentials for your License Administrator account, then click **Submit**.
   If you have multiple Type Server licenses with the same License Administrator, choose the appropriate license and click **Select**.

For more information, see the Management application documentation.

Downloading the installers

You can download the Core Client installer from Universal Type Server Support. Be sure to download installers for the platforms that you are supporting.

System requirements

The latest system requirements and other information is available at [Universal Type Server System Requirements](#).

Macintosh

- macOS™ 10.11 through 10.14
- 2.0 GHz or faster processor
- 1 GB available hard drive space for application files, plus additional space for fonts
- 100 Mbit/s or faster network connection

Windows

- Windows® 8.1 or Windows 10
- 2.0 GHz or faster processor
- 1 GB available hard drive space for application files, plus additional space for fonts
- 100 Mbit/s or faster network connection

User accounts

All Core Client users need to have an account on your Universal Type Server. You can use an LDAP server to authenticate existing network users, or you can create user accounts manually.

For details about adding network user accounts to your Type Server, see the **Directory Services** or **Active Directory** section of the Management documentation.

For network user accounts, you may still wish to change some of the account settings as described below.

> **NOTE:** The Core Client can be used with Active Directory and Kerberos Single sign-on to automatically connect the user to the correct Type Server without them having to enter a password. See *Connecting automatically* on page 11.

To create a user account:

1. Start your web browser and log in to the Management application.
2. Click **Users** in the workspace tab at the top of the window.
3. **Optional:** Choose a workgroup from the **Filter By Workgroup** pop-up menu.
   If you choose a workgroup, new users will be added to that workgroup. If you choose **All Workgroups**, new users will not be added to any workgroup.
4. Click **+** at the top of the **Users** list to add a new user.
5. In the **User Account Data** pane on the right, click **Account** and enter at least a User ID.
6. Click **Settings**. Only a few options are used for Core Client users:
   - **Enforce System Font Policy:** Select this option to have the Core Client monitor the user's System Fonts and disallow removing required fonts or adding new fonts.
   - **Disable Startup Sets:** Fonts in a user's Startup Sets are automatically activated when the Core Client connects to the Type Server. If you select this option, fonts in Startup Sets will not be activated for the user.
     You might choose to turn off this option but enforce the System Font Policy for users that do not need to use fonts other than those required by their operating system.
   - **Time between server syncs:** The Core Client will connect to the Type Server at this interval and activate or deactivate fonts as needed.
     Most Core Client users will not have frequent changes to their available fonts, so you can safely change this to a larger interval, or even **Manual**. (The Core Client will always synchronize with the Type Server when it establishes a connection, and the user can perform a manual sync at any time.)
7. Click **Save** to save the user account.
8. To add the user to a workgroup, right-click the **User ID** in the **Users** list, choose **Manage Workgroup Assignment**, select one or more workgroups, then click **OK**.

For details about user accounts and account settings, see the **Users** section of the Management documentation.

Creating Startup Sets

The Core Client uses Startup Sets to determine what fonts to activate.

In order to create a Startup Set, you must connect to your Type Server with Universal Type Client using an account that is either a Font Administrator or a Workgroup Administrator in the same workgroup as the Core Client user.

If the user's workgroup has fonts that are not included in a Startup Set, they will be not able to activate those fonts using Core Client.

To create a Startup Set:

1. In Universal Type Client, select the workgroup where you want to add the Startup Set.
2. Select fonts in the font list that you want to include in the Startup Set.
   You can add or remove fonts at any time.
3. Choose **File > New Set from Selection**. Enter an appropriate name for the set.
4. With the new set selected, choose **File > Share Set**, then choose **File > Startup Set**.
5. Quit the Type Client.

For more information about sets, see the **Sets** section of the Type Client documentation.

> **IMPORTANT:** Do not install Universal Type Client on a system where you have installed or will install the Core Client.

Installing the Core Client

Copy or download the Core Client installer to the client computer. Installers are available here: Universal Type Server Support.

Double-click the Core Client installer icon and follow the instructions in the installer screens. You should accept all of the installation defaults.

Using the Core Client

Most of the time the Core Client will function in the background. The only times a user needs to interact with it is to log in, to choose a different workgroup, or to perform a manual synchronization.

Logging in

The Core Client installer sets the Core Client to start automatically when a user logs in to the computer. The user will be presented with a connection window, where they need to enter their Type Server account username and password.

If you need to start the Core Client manually:

- On macOS, double-click the Type Server Core Client icon located in the Applications folder.
- On Windows, choose **Type Server Core Client** from the **Start** menu.

Choosing a workgroup

A workgroup associates one or more Universal Type Server user accounts with a selection of fonts. In any given workgroup, a user might have a different role and access to different fonts than in other workgroups. (The Core Client doesn't give users access to any capabilities that different roles might provide.)

After the user logs in, the Core Client presents a list of the user's workgroups that have one or more Startup Sets. (Workgroups that do not have Startup Sets are not listed.)

At the top of the list is **All Workgroups**, a virtual workgroup that conglomerates the fonts and sets included all workgroups. Choosing this allows the user to activate fonts in all the Startup Sets in all their workgroups.

Below this the Core Client lists each individual workgroup. Under each workgroup are the Startup Sets included in that workgroup.

The user can choose **All Workgroups** (which is the default), or any single workgroup. When the user selects a workgroup, Core Client deactivates previously-activated fonts, then immediately activates fonts from the selected workgroup.

Manual synchronization

Core Client users are automatically synchronized with the Type Server based on the **Time between server syncs** specified for their account. Synchronization downloads and activates fonts in the user's Startup Sets, deactivates and removes any fonts that are no longer in the user's Startup Sets, and applies the System Font Policy (if this option is turned on).

Users can also manually synchronize fonts at any time.

To manually synchronize fonts, choose **Synchronize Now** from the ⚙ **Tools** menu.

To force the Core Client to re-download all fonts and settings instead of just new fonts and changes, hold down the *OPTION* key (Macintosh) or *CTRL* key (Windows), then choose **Synchronize and Reset** from the ⚙ **Tools** menu.

Logging out

The user will rarely need to manually disconnect from Type Server.

To close the Core Client and stay connected to the Type Server:

- **Mac:** Choose **Core Client > Quit**, press ⌘+*Q*, or close the window.
- **Windows:** Press *ALT+F4* or close the window.

If the user really does need to disconnect, they should first make sure that they're finished using fonts and that they don't have any jobs in a print queue, since disconnecting automatically deactivates all synchronized fonts. (Of course they will be able to continue to use system fonts.)

To disconnect from Universal Type Server, choose **Forget Connection** from the ⚙ **Tools** menu.

Connecting automatically

Without any other configuration, a user would need to log in to a Universal Type Server every time they start their computer.

There are several steps you can take to make this process easier for the user, and more secure for your organization.

- **Configuration file:** Deploy a configuration file that will automatically fill in the server connection information in the Core Client login screen.
- **Automatic login:** Set up your Type Server, user account, and the user's computer to have the Core Client automatically log in to the Type Server when the user logs in to their computer.
- **Allow only specific fonts:** You can assign the user to a workgroup with a Startup Set and turn on the System Font Policy so that the user has access to specific fonts and cannot add fonts to their system.

By configuring all these options, the Core Client does its job (enforcing your organization's font compliance requirements) with minimal interruption to user workflow.

Configuration file

You can add a configuration file to a Core Client user's computer that will automatically fill in the Type Server connection information.

If all your users connect to the same Type Server, you can create one file and deploy it to all workstations.

In order to create the configuration file, you will need a text editor capable of saving a plain text file in UTF-8 format without a byte order mark (BOM). You can use TextEdit on macOS or Notepad on Windows.

If you prefer a more robust editor, we recommend BBEdit for macOS and Notepad++ for Windows.

BBEdit: `https://www.barebones.com/products/bbedit/`
Notepad++: `https://notepad-plus-plus.org/`

The configuration file consists of one or two lines that identify the server to the Core Client. You can specify the server by address and port, or using its Bonjour name. For information about setting the server's Bonjour name, see the **Server Status** section of the Server Administration documentation.

Example: IP address and port
```
server.address=12.34.56.78
server.port=8080
```

Example: DNS name and port
```
server.address=example.com
server.port=8080
```

Example: Bonjour name
```
server.bonjour=Universal Type Server 1
```

> **NOTES**
> - You must include either the `server.bonjour` parameter or both the `server.address` and `server.port` parameters.
> - If you include both `server.bonjour` and `server.address`, the Bonjour name will be used to make the connection.
> - The default port for Core Client communication is **8080**.
> - The configuration file must end with an empty line; press *ENTER* or *RETURN* after your final configuration parameter.

Headless mode

Headless mode automatically syncs and activates fonts from all of a user's Startup Sets, and does not allow them to change what is activated. (Note that the Core Client window is still open with headless mode on, so that the user can perform other tasks, such as disconnecting from the server.)

To turn headless mode on, insert the following line into the configuration file:
```
headlessmode.enable=true
```

To turn headless mode off, remove the line, or change it to **headlessmode.enable=false**.

When headless mode is on, the Core Client will display a warning after the user logs in. When the user dismisses the warning, they will have access to the ⚙ **Tools** menu, allowing them to sync fonts with the server, or disconnect from the server.

If the user quits the Core Client application, all fonts will remain active.

> **NOTE:** You can use headless mode without specifying the server connection parameters.

Saving in UTF-8 format

The configuration file needs to be named **com.extensis.TypeServerCoreClient.conf.** You can either save your file with this name or rename it when you have finished. If your text editor appends **.txt** or other extension, be sure to remove it before deploying the file.

- In TextEdit on macOS, choose **Format > Make Plain Text** to convert your file to plain text, choose **File > Save**, then choose **Unicode (UTF-8)** from the **Plain Text Encoding** pop-up menu.
- In Notepad on Windows, choose **File > Save**, then choose **ANSI** from the **Encoding** pop-up menu. (Do not use Notepad's UTF-8 or Unicode formats; these add a byte order marker which is not recognized by the Core Client.)
- In BBEdit on macOS, choose **File > Save**, then choose **Unicode (UTF-8)** from the **Encoding** pop-up menu.
- In Notepad++ on Windows, choose **Encoding > UTF-8** before saving the configuration file.

Deploying the configuration file

Once you have created the configuration file, you need to copy it to the computers where you have installed the Core Client.

- On macOS, copy the file to the **/Library/Preferences/** folder.
- On 64-bit Windows, copy the file to **C:\Program Files (x86)\Extensis\Type Server Core Client**.
- On 32-bit Windows, copy the file to **C:\Program Files\Extensis\Type Server Core Client**.

Automatic login

You can configure a user's computer to automatically connect the Core Client to the Type Server without displaying the login window.

You will need to:

- Create a Universal Type Server user account through **Directory Services** in the Management application.
- Configure Kerberos Single sign-on.
- Configure the user's computer to log in using Active Directory.
  For macOS users, the Macintosh computer needs to be joined to the Windows domain in order to use Active Directory.

With a configuration file deployed, an Active Directory-based Type Server account, Kerberos Single sign-on, and a computer that logs in to the network using Active Directory, the Core Client will automatically log in to the Type Server when the user logs in to their computer.

Allow only specific fonts

To ensure that a user always has access to a specific selection of fonts, you can do two things:

- Turn on the System Font Policy for the user in the Management application.
  This ensures that the user cannot install additional fonts on their system.
- Make sure that the user is a member of a single workgroup where all of their required fonts are in a Startup Set, or activate headless mode so that all of their Startup Set fonts are always activated.
  This ensures that a specific group of fonts is always synced to the user's system and automatically activated when they connect to the Type Server.

Uninstalling the Core Client

macOS

1. Start the Core Client.
2. Choose **Forget Connection** from the ⚙ **Tools** menu.
3. Quit the Core Client.
4. Delete the file Type Server Core Client in the Applications folder.
5. Delete the following (you will need to enter your computer password to delete each of these items):
   - The `Core Client` folder located in `\Library\Application Support\Extensis\`
   - The file `com.extensis.TypeServerCoreClient.plist` located in `\Library\LaunchAgents\`
   - The `Core Client` folder in `<user>\Library\Extensis\` (where **<user>** is the name of the user logged in to the computer)
     To access the **<user>** library, hold down the *OPTION* key and choose **Go > Library** in the Finder.
6. Restart your computer, then empty the Trash.

Windows

1. Start the Core Client.
2. Choose **Forget Connection** from the ⚙ **Tools** menu.
3. Quit the Core Client.
4. Open the **Programs and Features** control panel.
5. Choose **Extensis Universal Type Core Client**.
6. Click **Uninstall**.
7. Follow the prompts to uninstall.
8. Restart your computer.

Quick Reference

(Print this page, or save it as a stand-alone PDF, as a reference for Core Client users.)

Login

When the Core Client starts, you may be prompted to connect to a Type Server. Either choose the appropriate server from the drop-down list, or enter the server address and port number. (Your Type Server administrator may have configured your computer to automatically fill in the server information.)

Server name	
Server address	
Port number	

Enter your **Username** and **Password**, then click **Connect**. Your Type Server administrator can provide this information.

Take the usual precaution with your password: don't leave it written down in a location that is easily accessible to your workstation.

Username	
Password	Don't even **think** about writing your password down here!

Headless mode

If you log in then see the message **Headless mode enabled**, then your Type Server administrator has configured your computer to automatically synchronize and activate all the fonts available to you.

Click **OK** in the message.

When you are in headless mode, you can:

- Use the ⚙ **Tools** menu to manually synchronize fonts, or to disconnect from the Type Server.
- Click **Close** to close the Core Client window; it will still work in the background to keep your fonts active.

Workgroups

After you log in, Core Client displays a list of your workgroups and their associated Startup Sets.

Choose any workgroup to activate the fonts in its Startup Sets (and deactivate fonts from the previous selection).

Choose **All Workgroups** to activate the fonts in all of your Startup Sets.

⚙ Tools menu

- Choose **Synchronize Now** to manually synchronize fonts with the Type Server.
  You can do this if your Workgroup Administrator has added fonts to your Startup Sets and you don't want to wait for the Core Client to run its scheduled synchronization.
- Choose **Forget Connection** to disconnect from the Type Server.
  You'll be returned to the login window, where you can log in as a different user or connect to a different Type Server.
  When you disconnect from the server, all your synchronized fonts will be deactivated (you will still be able to use system fonts).
- Hold down the *OPTION* key (Macintosh) or *CTRL* key (Windows) and choose **Synchronize and Reset** from the ⚙ **Tools** menu to force Core Client to re-download all fonts and settings instead of just new fonts and changed settings.

Contacting Extensis

Extensis

1800 SW First Avenue, Suite 500
Portland, OR 97201
Web: https://www.extensis.com/

Extensis Europe

Suites 17 & 18, Newton House
Kings Park Road, Moulton Park
Northampton NN3 6LG, United Kingdom

Customer Service

Support Form: https://help.extensis.com/hc/en-us/requests/new/

Sales

Web: https://www.extensis.com/contact-us-form/ (all regions)
We also work with resellers around the world; find one near you.

Extensis: https://www.extensis.com/
Support Form: https://help.extensis.com/hc/en-us/requests/new/
Sales: https://www.extensis.com/contact-us-form/
Extensis Channel Partners: https://www.extensis.com/resellers/

Support

Use these resources to get answers to questions you have about Universal Type Server and other Extensis products.

Universal Type Server

Universal Type Server Support
This page links to installers, PDF downloads, and other common support resources.

Universal Type Server System Requirements
Full system requirements and other information about the current version of Universal Type Server.

Universal Type Server Release Notes
Historical release notes for all updates to the current major release of Universal Type Server.

Universal Type Server Knowledge Base
Articles describing situational issues and solutions to user-reported problems with Universal Type Server.

Universal Type Server Videos
Get hands-on help through short video tutorials (in English).

Universal Type Server: Compatibility Guide
This page provides details on the support status of Universal Type Server with recent operating systems and databases.

Universal Type Client: Compatibility Guide
Shows compatibility between recent Type Client versions, operating systems, and third-party applications.

Universal Type Server Support: `https://www.extensis.com/support/universal-type-server-7`
Universal Type Server System Requirements: `https://www.extensis.com/support/universal-type-server-7/system-requirements`
Universal Type Server Release Notes: `https://www.extensis.com/support/universal-type-server-7/release-notes`
Universal Type Server Knowledge Base: `https://help.extensis.com/hc/en-us/categories/360000852313`
Universal Type Server Videos: `https://help.extensis.com/hc/en-us/sections/360002626213`
Universal Type Server: Compatibility Guide: `https://www.extensis.com/support/universal-type-server-support-guide/`
Universal Type Client: Compatibility Guide: `https://www.extensis.com/support/universal-type-client-support-guide/`

General resources

Knowledge Base
Search for articles about any current Extensis product, and retired versions as well.

Support Services
Details about types of support and hours of availability, including our Support Policy.

Our Support Policy in a nutshell
Extensis provides full support for the current version of all shipping products. In addition, Extensis provides limited support for older products up to one year after the product version is no longer offered for sale.

Extensis Videos on Vimeo
Hundreds of training sessions, events, and webinars. These are mostly in English, but there are some gems in French and German as well.

Extensis Videos on YouTube
Training, event, and educational videos (in English).

Support Form
Use this form to submit a support case.

Provide as much of the following information as you can:
- Your email address;
- As the Subject, a brief description of the problem you are having;
- A more detailed description of the problem: when it occurs, whether you can reproduce it, whether it has caused you to lose data, and any other details to help our staff track down the issue.
- Your company name or account number;
- The type of support you need (generally you'll choose **Fix an Issue/Technical Support**);
- The product you're using;
- The version of the product (generally this is in the product's **About** box);
- Your operating system;
- Any creative application that might also be affected.

You can also attach a screen shot or other file related to your issue.

Chat
Click **⌕ Chat** at the bottom right of any page of the English version of the Extensis website. (Chat is only available in English, between 8:00AM and 3:00PM Pacific time, Monday through Friday.)

Learn and Support
Links to white papers, testimonials, blog posts, and other resources.

Knowledge Base: `https://help.extensis.com/hc/en-us/`
Support Services: `https://www.extensis.com/support/support-policy/`
Extensis Videos on Vimeo: `https://vimeo.com/extensis/videos/`
Extensis Videos on YouTube: `https://www.youtube.com/user/extensisblog`
Support Form: `https://help.extensis.com/hc/en-us/requests/new/`
Extensis (Chat): `https://www.extensis.com`
Learn and Support: `https://www.extensis.com/learn-and-support/`

Legal resources

Extensis EULA

The legalese description of your rights while using Universal Type Server and any associated services.

Privacy Policy

Details about information we collect and how we use it, including information specific to Europe and California.

Privacy Shield

Details about our practices regarding personal information transmitted to us from organizations subject to protection laws in the European Economic Area and Switzerland.

Terms of Use

These terms apply to everything you do on our websites and affiliated websites. They are not the same as terms detailed in the Extensis EULA, which apply specifically to software and related services.

Extensis EULA: `https://helpdocs.extensis.com/en/universal-type-server/core-client/7.0.3/Content/Legal/extensis-eula.htm`

Privacy Policy: `https://www.extensis.com/privacy-policy/`

Privacy Shield: `https://www.extensis.com/privacy-shield-policy/`

Terms of Use: `https://www.extensis.com/terms-of-use/`