



Extensis

Universal Type Server

MANAGEMENT GUIDE



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Universal Type Server Management v7.0.6 // 25 March 2021

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Universal Type Server Management

What's new

Universal Type Client 7.0.10

- We have added an auto-activation plug-in for Adobe After Effects CC 2021.

Universal Type Client 7.0.9

- We have validated Universal Type Client for macOS 11.x and Apple M1 systems. (Universal Type Client runs on Apple M1 systems using Rosetta 2 emulation.)

Universal Type Client 7.0.7

- Auto-activation plug-ins for Adobe Creative Cloud 2021 releases of Illustrator, InCopy, InDesign, and Photoshop.
- Extensis Font Panel for Adobe CC 2021 releases of Illustrator, InDesign, and Photoshop.

Version 7.0.6

- Type Server: Support for PostgreSQL as an external database.
- Type Client: We added a confirmation dialog when deleting a user-created font attribute.

IMPORTANT: Support for Microsoft SQL Server and MySQL has been discontinued. While we support these external databases in the current release of Universal Type Server, they will be dropped in a future release.

Universal Type Client 7.0.4

- Support for macOS Catalina.
- Auto-activation plug-ins for Adobe Creative Cloud 2020 releases of After Effects, Illustrator, InCopy, InDesign, and Photoshop.
- Extensis Font Panel for Adobe CC 2020 releases of Illustrator, InDesign, and Photoshop.
- Auto-activation plug-in for Sketch.

Version 7.0.3

- The Windows Core Client now enforces the System Font Policy.
- Universal Type Client includes in-app messaging to provide important product information.
- We have added set creation and activation capability to the Adobe Fonts library.
- We have added an auto-activation plug-in for QuarkXPress 2019.

Version 7.0.2

- Universal Type Client and Core Client are now completely 64-bit.
- Universal Type Server no longer requires serial numbers for licensing the server and components; instead, you enter the Extensis account credentials (email address and password) of the software's License Administrator.
- Universal Type Server includes in-app messaging to provide important product information to the Server Administrator.

Version 7.0.1

- **Font Usage by User report:** This new report provides administrators with a snapshot of a user's current font usage.

Version 7.0.0

The big news in Universal Type Server 7 is the completely new Management application for managing users, workgroups, and fonts. This application uses modern Web technologies (and eliminates Adobe Flash) to provide an experience that is easier to navigate, fast, streamlined, and secure.

This release also includes:

- Auto-activation plug-ins for Adobe CC 2019.
- Improved security between Universal Type Client and Universal Type Server.
- Bug fixes.

System requirements

For the most up-to-date information about the latest release of Universal Type Server, please visit [Universal Type Server System Requirements](#).

IMPORTANT: An Internet connection is required for the activation and use of Universal Type Server. See [Entering serial numbers into Universal Type Server version 7.0.2 or later](#).

Macintosh Server

- macOS™ 10.12 through 10.14
- 2.0 GHz or faster processor
- 4 GB RAM (8 GB recommended)
- 2 GB available hard drive space for application files, plus additional space for fonts

Windows Server

NOTE: Universal Type Server 7 requires a 64-bit version of Windows.

- Windows® Server 2012 R2, Windows Server 2016, or Windows Server 2019
- 2.0 GHz or faster multi-core processor
- 4 GB RAM (8 GB recommended)
- 2 GB available hard drive space for application files, plus additional space for fonts

Enterprise Edition database requirements

Enterprise Edition users have the option of utilizing one of these external databases. Use of an external database is **required** with a proxy failover configuration.

- PostgreSQL version 12.2 or 12.3 (macOS or Windows)
- (Deprecated) Microsoft SQL Server 2012 or 2016 (Windows)
- (Deprecated) MySQL 5.5, 5.6, or 5.7 (macOS or Windows)

IMPORTANT: Support for Microsoft SQL Server and MySQL is deprecated. While we support these external databases in the current release of Universal Type Server, they will be dropped in a future release.

Universal Type Server System Requirements: <https://www.extensis.com/support/universal-type-server-7/system-requirements>

Entering serial numbers: <https://help.extensis.com/hc/en-us/articles/360018517534>

Macintosh Universal Type Client

- macOS 10.11 through 10.15 and macOS 11
- 2.0 GHz or faster Intel processor
(Universal Type Client runs on Apple M1 systems using Rosetta 2 emulation.)
- 1 GB available hard drive space for application files, plus additional space for fonts
- 100 Mbit/s or faster network connection
- An Internet connection and Safari® 9 or later or the current release of Firefox® or Chrome™ to view Help

Windows Universal Type Client

- Windows 7, Windows 8.1, or Windows 10
(64-bit only)
- 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
- An Internet connection and Internet Explorer® 11, Microsoft Edge, or the current release of Firefox or Chrome to view Help

Server Administration and User Management

Requirements for any computers that will be used for Server Administration or User Management. These applications can be run remotely.

- Microsoft Edge (for administering the server from Windows), Safari 11 or later (for administering the server from a Macintosh), or the current release of Firefox or Chrome.
- An Internet connection and one of the above browsers to view Help.

Reports

Reports can be viewed from any supported desktop browser.

- Microsoft Edge (for viewing reports from Windows 10), or
- Safari 11 or later (for viewing reports from macOS), or
- The current release of Firefox, or
- The current release of Chrome.

Reports can also be viewed from a tablet on the same network as the Universal Type Server. Minimum requirements are:

- iOS 11 or later, Android™ 9.0 or later, or Windows 10 version 1803 or later, and
- 1024×768 or larger display.

Opening User Management

Administrators manage users, workgroups, roles, and permissions using the User Management application. This application can be accessed through any supported web browser.

To open the User Management application:

- Open a supported web browser.
- In the address bar, enter your Type Server's IP address followed by a colon and the port number. The default User Management port is **8080**.
Example: `http://10.1.2.32:8080` or `http://localhost:8080` if administering the server locally.
- Choose a display language from the menu.
- Enter a user name and password and click **Login**.
Passwords are case-sensitive but user names are not.

You can also start the User Management application from the Universal Type Client; choose **Server > Manage Users and Workgroups**.

NOTE: If you log in using the Server Administrator account, for the most secure configuration, change the password as soon after installation as possible. See *Changing the Server Administrator password* on page 14.

Changing the display language

Change the display language from the drop-down menu on the User Management login page.

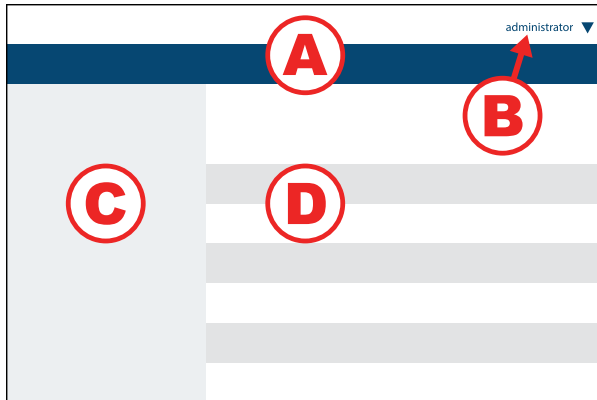
The application supports administration in English, German, Spanish, and French.

It's important to note that this only changes the language displayed in the User Management page. The client's user interface, as well as the Server Administration application remain in the language currently selected for each application.

SSL security

The Universal Type Server User Management application includes a secure connection option through port **8443**. See the Server Administration User Guide or help system for details about implementing your own security certificate.

Tour



A. Workspace list

Click a label in the list to open that workspace.

B. Account menu

Click the menu to choose additional setup options, view Help, or log out.

C. Work list

Select a specific item to view or modify. The contents of this list depend on the workspace.

D. Work area

Edit information for the selection in the work list

The Management application is organized into a series of functional workspaces. Choose a workspace from the list along the top of the window.

The workspaces available will depend on the permissions for your account.

Administration: Use the Administration workspace to add and remove licenses. In Universal Type Server 7.0.2 and later, a license does not require a serial number; you validate your licenses and features through a one-time connection to an Extensis server. See *Licensing Universal Type Server* on page 11 for details about licensing.

Fonts: Shows the fonts available to Universal Type Server. The work list can be filtered by license, connected user, workgroup, or compliance status; the work area shows the fonts associated with the selection of items in the work list. (Fonts are installed using the Universal Type Client.)

Users: The work list allows you to filter the displayed users by a specific workgroup (or all workgroups), then the work area shows account information for a selected user. You can add and remove native user accounts, assign users to workgroups, and change a user's settings and permissions.

Workgroups: A workgroup is a collection of users with access to the same set of fonts. You can create, edit, and delete workgroups. Choose a workgroup from the work list to see and filter its members.

User Roles: A user role is a pre-defined set of permissions. Apply a role to a user to quickly grant them those permissions. Since a user might have different responsibilities in different workgroups, each user can have a different role for each workgroup. There are four default roles, and you can add your own. (Each user can also have custom permissions.)

Font Licenses: In Universal Type Server, a Font License is used to measure and optionally restrict usage for each font. In the work list, you can add, edit, and remove licenses, and edit the Terms of Use that can be applied to font licenses. In the work area you can edit details for each license, and attach electronic documentation of the license and purchase.

Reports: Universal Type Server provides a variety of graphical reports that show details about fonts, users, workgroups, and font usage. The data for a report can be exported to a spreadsheet-compatible format.

Quick start

After installing Universal Type Server and performing any necessary configuration in the Server Administration application, the next step in the installation process is to plan your configuration, then create workgroups and add users.

Workgroups are the containers in which fonts are stored. Administrators provide user access to fonts by adding users to workgroups. All workgroup and user tasks are performed through the User Management application. It is here that administrators create workgroups and user accounts as well as manage associated settings and permissions.

The basic user and workgroup configuration steps include:

- Plan your configuration (see **Configuration scenarios** on page 19)
- Create workgroups (see **Creating and editing workgroups** on page 32)
- Create new users (see **Creating and editing users** on page 35)
- Add users to workgroups (see **Adding users to workgroups** on page 40)
- Assign workgroup roles to users (see **Applying a role** on page 40)
- Modify user settings as required (see **Settings** on page 36)

After completing the steps above, you are ready to add fonts to workgroups using the Universal Type Client.

Most font-related tasks—such as adding and deleting fonts, tagging fonts with keywords, and font activation—are accomplished using the Type Client. For detailed instructions, see the Universal Type Client User Guide and help system.

Setup

The Management application is installed as part of the Universal Type Server package.

To start the Management application, open your web browser and enter the IP address of your Type Server, followed by a colon and the port number for the Management app (by default, this is **8080**).

For example, if your Type Server's IP address is **123.45.67.89**, then you would enter **123.45.67.89:8080**.

At the login page, choose a display language, then enter your login credentials.

The first thing you will need to do after installing Universal Type Server is activate your license.

Licensing Universal Type Server

Trial version

You can use all Universal Type Server features on a trial basis; request a trial from [Extensis](#). You will receive a trial license by email.

To license the trial version:

1. Start the Management application and log in.
2. Click the **Administration** tab, then click **Licenses**.
3. Click **Try Universal Type Server**.
4. Enter the trial license and click **Submit**.

You may receive multiple trial licenses to allow you to review multiple features, such as FontLink Module for InDesign Server; you can enter each license separately or paste them all into the **Trial License** dialog.

Full license

IMPORTANT: An Internet connection is required for the activation and use of Universal Type Server. See [Entering serial numbers into Universal Type Server version 7.0.2 or later](#).

In previous releases of Universal Type Server, you would enter one or more serial numbers that identified various features that would be activated.

In order to activate your current installation, you just need to enter an email address and password one time.

1. Start the Management application and log in.
2. Click the **Administration** tab, then click **Licenses**.
3. Click **Activate Universal Type Server**.
4. In the **Login** dialog, enter the email and password of your License Administrator and click **Submit**. (For more information, see **The License Administrator** on the next page.)

Your Type Server will communicate with Extensis to determine your license information and activate your installation.

Request a Demo: <https://www.extensis.com/request-a-demo-universal-type-server>

Entering serial numbers: <https://help.extensis.com/hc/en-us/articles/360018517534>

If your organization has multiple licenses for Universal Type Server with the same License Administrator account, you will be presented with a list of possible licenses; choose the appropriate one from the list and click **Select**.

INSTALLATION NOTES

- **If this is a new installation of Universal Type Server**, you will need to activate your license using the above process.
- **If you have upgraded from Universal Type Server 6.x**, you will need to activate your new license using the above process.
- **When upgrading from Universal Type Server 7.0 or 7.0.1**, you can continue to use your existing license. To add new features, you will need to remove your existing license, then activate your new license using the above process (which requires an Internet connection). See **Adding features** on the next page.

The License Administrator

For new licenses, the License Administrator is the person designated as your organization's contact when the order for Universal Type Server is placed with Extensis or an authorized reseller.

For upgrades, the License Administrator is the person who registered your current license.

If you need to find or change your License Administrator, please use the [Support Form](#) and enter this information:

- **Your email address**
- **Subject:** Enter "Type Server License Administrator"
- **Description:** Please identify whether you need to find who your License Administrator is, or to change your License Administrator. Be sure to include the name and email address of the new License Administrator.
- **Support Type:** Choose "Account Issue"

NOTE: If you are running a licensed copy of Universal Type Server 7.0.2 or later, the email address used for the License Administrator is shown at the top of the Licenses panel in the Administration tab. If this information is not sufficient for you to identify a person in your organization, then use the [Support Form](#) to contact us.

Deactivating Universal Type Server

If you need to remove the license from your installation of Universal Type Server (for instance, if you need to move it to another system):

1. Open the Management application.
2. Click the **Administration** tab, then click **Licenses**.
3. Click **Remove**, then click **OK** in the confirmation dialog.

Adding features

You can license new features for Universal Type Server, such as additional client seats, Core Client access, or FontLink for InDesign Server.

Some new features will appear automatically (an Enterprise license upgrade or FontLink for InDesign Server); check the **Administration** tab of the Management application to see that these are present. (If these additions do not show up soon, you can use the following process to manually update your licenses.)

If you have added more Type Client or Core Client seats, then you will need to update your licenses:

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**.

Additional steps

Review these additional setup operations:

- **Changing the Server Administrator password** on the next page
- **New user defaults** on the next page
- **Importing users** on page 15
- **Active Directory** on page 45
- **System Font Policy** on page 16
- **Custom roles** on page 30
- **Font licenses** on page 54
- **Terms of Use** on page 55

The Administrator account

There is only one Server Administrator account per Universal Type Server installation. The Server Administrator can perform any administrative task from the Server Administration and User Management applications as well as any task in the Universal Type Client.

Most importantly, the Server Administrator is the only user account that is able to assign or remove the **Is Full Administrator** setting (see **The Full Administrator setting** on page 41), and cannot be deleted from the server.

Typically, the only time you would use the Server Administrator account is during the initial configuration of the Type Server, and when you need to add or remove users with the **Is Full Administrator** setting.

The Server Administrator username is always set to **administrator** and the default password for the account is **password**. For optimal security, change this password as soon as possible after installation.

Changing the Server Administrator password

After installing the server, for security reasons, it is very important to change the password for the Server Administrator account. This account has access to all of the functions of the Universal Type Server and can delete and change all users and workgroups. It is important to keep this account login secure.

Until other users are created, the Server Administrator account is the only account with access to the User Management application.

To change the administrator password:

1. Open the User Management application (see **Opening User Management** on page 8).
The Server Administrator account username is **administrator**, and the default password for this account is **password**.
2. Click **Users** in the workspace list at the top of the window.
3. Select the **Administrator** user account.
4. In the **User Account Data** panel, click **Account**.
5. Enter a new password in the **Password** field, then enter it again in the **Confirm Password** field.
6. Click **Save**.

IMPORTANT: Do not lose the Server Administrator password! This is the **only** username and password that cannot be reset or recovered. If you do lose your Server Administrator password, please contact Extensis technical support for assistance. See **Support** on page 62 for contact information.

New user defaults

These are the default settings that will be applied when you create a new user account. These settings can be individually changed for each user.

Defaults can be specified by the Server Administrator or a Full Administrator.

To specify default new user settings, click the **Account** menu at the top right of the **Management** window and choose **New User Defaults**, make whatever changes you need, then click **Save**.

Any User accounts you create after this point will have these settings.

For details on the effects of these settings, see **Settings** on page 36.

Change Password: This setting determines whether a user will be allowed to change their account password. (This only applies to native user accounts, not Active Directory accounts.)

Activate Fonts Across Workgroups: By default, auto-activation plug-ins only activate fonts in a single workgroup. This setting allows a plug-in to activate fonts in multiple workgroups.

Manage a Personal Workgroup: Enabling this will allow a user to have a collection of their own fonts available, either on the server or locally on their computer.

Enforce System Font Policy: The System Font Policy determines what fonts can be installed locally on a user's computer, and what will be done with any fonts not included in the policy.

Disable Startup Sets: A startup set contains fonts that are automatically activated when a user logs in. This setting allows you to disable that feature for specific users.

Time Between Server Syncs: Universal Type Client checks with the server regularly to determine whether fonts are available to be activated. This setting determines how frequently the client checks in.

Font Replication Mode: This setting determines when fonts are downloaded from the server to a user's computer.

Importing users

A fast way to create multiple user accounts at one time is to import a list of users from a tab-delimited text (.TXT) file. This way administrators can quickly set up users before adding them to workgroups.

NOTE: Only the Server Administrator or a Full Administrator can import a list of users.

The text file must be formatted to include tab-delimited information, in order, with line breaks between users. To import properly, the .TXT file must be saved as ASCII text with UTF-8 encoding.

The only required fields are **User account name** and **Password**. All other fields may be left blank if desired.

- User account name
- Password
- User full name
- Email address
- Notes
- Role
- Workgroup1
- ...
- WorkgroupN

For example:

```
jsmith → johnspassword → Smith, John → jsmith@domain.com → MyNotesHere → Contractor → Designers¶
```

where → represents the tab character and ¶ represents a line break.

To skip a field, but enter other information, put extra tabs between the fields. For example, to enter a **User account name**, **Password**, and **Email address** only:

```
jsmith → johnspassword → → jsmith@domain.com¶
```

Multiple workgroups can be assigned by adding them at the end of each line, before the line break. For example, an entry with two workgroups named Design and Production would look like this:

```
jsmith → johnspassword → Smith, John → jsmith@domain.com → → Font Administrator → Design → Production¶
```

In the example above, John Smith would be added to both the Design and Production workgroups and given the Font Administrator role in both workgroups.

NOTE: To make it easy to create a properly formatted .TXT file, use the Export feature from your spreadsheet program, such as Microsoft Excel.

To import a list of users:

1. Log in to the Management application as the Server Administrator, or use an account with the **Full Administrator** permission.
2. Click the **Account** menu and choose **Import Users**.
3. Click **Browse**, select the file to import, then click **Choose** (Mac) or **Open** (Windows).
4. Click **Import**.

System Font Policy

A computer's operating system keeps fonts that it requires for operation in specific folders. Depending on his computer account permissions, a user may be able to add his own fonts to these folders.

To avoid having users install unauthorized fonts on their computers, you can enable a *System Font Policy*. The System Font Policy is a list of fonts that are allowed to exist in the computer's system font folders. If Universal Type Client "sees" a new font installed that is not on the System Font Policy list, it will remove the font.

The default System Font Policy list includes all required system fonts for supported Windows and Mac operating systems. It also includes a number of fonts required by certain common applications.

You can add fonts to the list, and you can remove any fonts that are not required system fonts.

Modifying the System Font Policy

Separate System Font Policy lists exist for Windows and macOS. Each list includes required system fonts for all supported operating systems (Windows 8.1 and Windows 10; macOS 10.11–10.15). You cannot remove any of these required fonts from the System Font Policy lists.

Each list also includes fonts required by some common applications. You can remove any of these fonts if desired.

You can enable the System Font Policy using the default font lists, or you can modify the lists as needed for your environment. You may especially want to add corporate branding fonts or fonts required by specific applications.

IMPORTANT: In order to add a font to either System Font Policy list, you must be able to access the file from the computer where you are running the Management application.

To add a font to the System Font Policy:

1. Log in to the Management application as the Server Administrator.
2. Click the **Account** menu and choose **System Font Policy**.
3. Click **Allowed macOS System Fonts** or **Allowed Windows System Fonts**.
4. Click the Add + button below the list.
5. Select the desired font file and click **Choose**.

You can select multiple font files and add them at the same time.

To remove a font from a list, select its name and click the Delete  button below the list.

Enabling the System Font Policy

You can enforce the System Font Policy for any Universal Type Client user.

IMPORTANT: On Windows, User Account Control policies may interfere with the ability to enforce a System Font Policy. You may need to consider UAC configuration changes in order to utilize the System Font Policy. See your Windows documentation for more information.

To enable the System Font Policy for a user:

1. Log in to the Management application.
The Server Administrator and Full Administrator can change this setting for any users; Workgroup Administrators and Font Administrators can change this setting for members of their workgroups.
2. Click **Users** in the workspace list at the top of the window.
3. Select a user in the list on the left.
4. In the **User Account Data**, click **Settings**.
5. In the **Details** pane, click the **Settings** tab.
6. Check **Enforce System Font Policy**, then click **Save**.

TIP: To quickly enable the System Font Policy for all users, select the **All Users** workgroup in the list on the left, click the first user in the list, hold down the *SHIFT* key and click the last user, check **Enforce System Font Policy**, then click **Save**.

To enable the System Font Policy for new users by default:

1. Log in to the Management application using the Server Administrator or a Full Administrator account.
2. Click the **Account** menu and choose **New User Defaults**.
3. Check **Enforce System Font Policy**.
4. Click **Save**.

Additional setup options

There are some other elements of Universal Type Server that you can configure at any time.

Active Directory

You can connect your Universal Type Server to your organization's Active Directory service. This allows you to map AD users and groups to Type Server workgroups and provide additional options for users to log in to your Type Server.

Learn more on page 45.

Custom roles

Universal Type Client includes several default roles that you can assign to users within workgroups. You may find that these roles are not quite what you need for your users' workflows. In this case, you can create and assign custom roles that grant exactly the permissions that you require.

Learn more on page 30.

Font licenses

In order to make the most of Universal Type Server's ability to enforce compliance with font licenses (so that a font is never in use by more users than you have licensed seats), you need to add Font License information.

This information can help you demonstrate compliance at any time, and can also help you determine if you need to add more seats for particular fonts.

Learn more on page 54.

Terms of Use

Part of a font's license includes where and how the font can be used. For instance, a license may allow a font to be used in print but not embedded in a PDF. You can add these details to a Font License that you create within the Management application. You can also add custom Terms of Use that further identify your organization's requirements for specific fonts.

Learn more on page 55.

Configuration scenarios

The mechanics of setting up Universal Type Server are not difficult. Adding workgroups, roles, and users are fairly simple matters. Yet, Universal Type Server can be configured in many different ways. To best meet the workflow needs of your organization, we recommend that you take a moment to plan how you'll configure your installation.

To create the ideal solution in your environment, you need to think through all the fonts you have, where they're from, what they're for, who's using them, and how they're using them. To help with the setup, we describe several typical workflows along with detailed explanations of their workgroups, user permissions, and roles. Once you identify the most logical configuration for your environment, plan out your workgroups and users before creating your system.

You may find that configuring a server for a small group of users helpful when determining the appropriate workgroups, roles, permissions, and settings for your environment.

Sample configurations

While you can structure your workflow in any way you want, you'll probably end up working with one of three common configurations: department based, project based, or full access.

Organizing fonts on a Department basis

If you have distinct groups of users that each require a different set of fonts, workgroups can be created for each department or group. This configuration is typical for companies with large numbers of users, such as magazines and book publishers.

With this configuration, fonts are added to workgroups based on each group's specific font needs. For example, a publishing environment might contain workgroups for design, editorial, advertising, and production. The fonts contained in each workgroup as well as the workgroup default roles can vary according to the user's font needs.

For example, the editorial department would likely have a well defined and locked down set of fonts. Users in this workgroup just need to know that they have the correct fonts, and would not likely need much additional font organization. With the fairly restrictive Regular User role (see **Default roles** on page 28) applied as the default workgroup role, the administrator can be sure that all users in the editorial workgroup have what they need, and aren't able to modify fonts.

Organizing fonts on a Project basis

With a project-based organization method you create workgroups for specific projects. This configuration is typical for companies with a medium to a large number of users, who typically work in teams, like design firms and ad agencies.

With this configuration you might have a workgroup for each division, client, campaign, or other project. Type Server users are only added to workgroups to which they are required. This way each project is contained within its own workgroup, and users can be certain that they have the fonts required for a project.

Providing full access

This is the most basic way to set up Universal Type Server, yet works well in environments with very few users such as small design groups and prepress shops. Basically, all fonts are added to a single workgroup to which all users are members. Through the use of a fairly permissive default workgroup role, each user is given the ability to perform most actions with all of the server fonts.

This method works great in situations where there isn't a dedicated IT administrator, and all of your users are fairly savvy. This workflow allows all users to have full access to all of the organization's fonts to complete their jobs. The downside of this method is that it doesn't scale well to fit larger workgroups, and has an inherent lack of control over keyword vocabulary as well as lack of control over which users can add and remove fonts.

This method can work well if you're installing Type Server on a trial basis.

Department-based configuration

Organizations with fairly structured departments that each have specific font needs can benefit from organizing fonts into department workgroups. This configuration is typical for companies with large numbers of users, such as magazines and book publishers.

For example, a publishing company might have different workgroups for the editorial, layout, and production departments. The editorial department doesn't choose which fonts to use, yet for copy-fitting needs, it is imperative that they have the correct fonts for the job. The layout team needs access to all of the company's fonts to have creative control over the design of each project. And the production group needs access to most of the company's fonts as well as the ability to collect fonts for printing jobs. Using a department based configuration, each department has its own workgroup and default role for users. This way administrators can easily control the fonts and permissions available to each workgroup.

Choose or create default roles

First determine what workgroups you will need, then decide on a default role for each workgroup. The default role defines a base set of permissions for all users added to the workgroup. Universal Type Server's predefined roles may work well for you, but if you require different default permissions you can create a custom role to use as your default. See **Custom roles** on page 30.

To review the permissions for the predefined roles:

1. Log in to the Management application.
2. Click **User Roles** in the workspace list at the top of the window.
3. In the list on the left, select each predefined role to examine the permissions settings.

Create workgroups

Create the workgroups required for your projects or clients.

To create a workgroup:

1. Click **Workgroups** in the workspace list at the top of the window.
2. In the list at the left, click **+**.
3. Enter a **Workgroup Name** for the workgroup.
4. Choose a **Default Role** from the pop-up menu.
5. Click **Save** to add the new workgroup.

Create users

Create users and add them to workgroups

To create a new user:

1. Click **Users** in the workspace list at the top of the window.
2. Select a workgroup from the pop-up menu in the list at the left. Users you create will automatically be added to this workgroup.
To create users without adding them to a workgroup, choose **All Workgroups** from the pop-up menu.
3. Click **+** at the top of the list.
4. In the **User Account Data** panel, enter the basic account information:
 - **User ID:** Each User ID must be unique. It's best to use an ID that is short, easy to remember and does not include spaces or letter case variations.
 - **Full Name:** Optional.
 - **Email Address:** Optional.
 - **Password:** This case-sensitive field is optional. If left blank, a password is not required for this user to log in.
If you enter a password, enter it again in the **Confirm Password** field.
 - **Notes:** Enter any notes to appropriately identify the user.
5. Click **Save** to add the new user.

Add users to workgroups

To assign users to multiple workgroups:

1. Click **Users** in the workspace list at the top of the window.
2. Select **All Workgroups** from the pop-up menu in the list at the left.
3. Right-click a **User ID** in the list, then choose **Manage Workgroup Assignment** from the shortcut menu.
4. Check the boxes for the workgroups that you want to assign the user to, then click **OK**.

TIPS

- You can select multiple users, then right-click one of the selected users to assign the same workgroups to several users at the same time.
- You can check the All Workgroups box in the Manage Workgroup Assignment dialog to check the boxes for all workgroups. You can then uncheck some workgroups, or leave them all checked.

Delegate roles

After adding users to workgroups, you'll need to delegate roles for each workgroup. Each user is assigned the default role when added to the workgroup, yet each workgroup will likely need users who have elevated permissions within the workgroup. It is best to assign these permissions with user roles.

When working with departments, you will need to have at least one person who is able to add, remove, and organize fonts within the workgroup. You can assign the Font Administrator role to users who need this ability.

If you have teams that are continually changing, and require the addition and removal of users from projects, you may need to consider having a Full or Workgroup Administrator for each workgroup. Full and Workgroup Administrators are able to log in to the User Management application and manage users. Having additional Administrators can be handy if your teams are located in different time zones and you need to manage workgroups in a timely fashion.

To delegate roles:

1. In the **Workgroups** pane, select the workgroup name.
2. In the **Users** pane, select the user that you want to update.
3. In the **Details** pane, click the **Workgroups** tab.
4. Select the workgroup name from the **Show permissions for Workgroup** drop-down menu.
5. Choose a new role for this user in the selected workgroup from the **Role in Workgroup** drop-down menu.
6. Click the **Save** button.

Configure user settings

After adding users, you need to determine the most appropriate font replication mode, synchronization and personal workgroup settings for each user. These settings control when fonts are brought down from the server to the client, and how long those fonts remain on the user's system. Typically, the default settings will work for most users, but for certain users exceptions can be made. These are configured on the **Settings** tab for each user.

- The default time between server syncs (see **Time Between Server Syncs** on page 38) should work for most installations. The exception may be a user who doesn't often need new or updated fonts. For these users, a longer synchronization interval can be set.
- The Font Replication mode controls when fonts are copied from the server down to the client computer. The default mode is **On-demand**, which gives users fonts only when they need to preview or activate them. The **On-demand** setting is typically the best choice for client computers that stay in the office. For users who are working on laptops and may need to work offline frequently, set the font replication mode to **All** (see **Font Replication Mode** on page 38). This ensures that all fonts in the Type Server are downloaded to the client, and always available for use offline.
- Enable personal workgroups (see **Manage a Personal Workgroup** on page 37) for users who need to add and activate fonts that they won't need to share with the rest of the workgroup. Server-based personal workgroups can be very helpful for users who work on multiple computers and need access to the same personal fonts on each computer. Otherwise, it's a good idea to have all users always add fonts to the main workgroup, and use sets to further organize fonts as necessary.

Add and organize fonts

After configuring users, distribute account login settings to users. Those who have permission can now begin adding fonts to workgroups using the Type Client.

For more information about adding, organizing, and managing fonts, see the *Universal Type Client User Guide* and help system.

Project-based configuration

This configuration is typical for companies with a medium to a large number of users, who typically work in teams, like design firms and ad agencies. If you have projects or clients that are easily separated into groups, a project based configuration method might be best for you.

For example, an agency that assigns employees to specific clients would benefit from having a workgroup for each client. Using this method, users who are working with a specific client are added to the client workgroup and thus have access to all fonts necessary for that client's projects. Further font organization is available within each workgroup through the use of font sets. So, if you create a workgroup for each client, you can organize fonts within each workgroup by creating a set for each project you do for that client.

Create workgroups

The first step is to create the basic workgroups required for your projects or clients.

1. Open your web browser and start the User Management application.
If it is already running, choose **Window > Users and Workgroups**.
2. In the **Workgroups** pane, click the **+** button. This opens the **New Workgroup** details pane.
3. Enter a **Workgroup Name** for the workgroup.
4. Choose a **Default Role** from the drop-down menu. For project-based workgroups, it is best to choose the **Regular User** default role. Less restrictive permissions can be set later for specific users by delegating user roles for each workgroup.
5. Click the **Save** button to add the new workgroup.
6. Repeat this process to create all necessary workgroups.

Create users

The next step is to create all of your users and add them to the workgroups.

To create a new user:

1. In the **Workgroups** pane select your new workgroup. Selecting the workgroup ensures that new users are automatically added to this workgroup.
2. In the **Users** pane, click the **+** button.
3. In the **New User** details pane, in the **Account** tab, enter the basic account information:
 - **Account Name:** Each user account name must be unique. It's best to use an account name that is short, easy to remember and does not include spaces or letter case variations.
 - **Full Name:** Required field. For ease of alphabetization, you can enter names in a "Last Name, First Name" format so that names can be easily sorted in the **Users** pane.
 - **Email Address:** Optional field.
 - **Password:** This case-sensitive field is optional. If left blank, a password is not required for this user to log in.
If you enter a password, enter it again in the **Confirm Password** field.
 - **Notes:** Enter any notes to appropriately identify the user.
4. Click the **Save** button to add the new user.
5. Repeat this process until all of your users are added.

Add users to workgroups

After adding users, users need to be assigned to each workgroup.

1. In the **Workgroups** pane, select the **All Users** workgroup.
2. To assign users to workgroups, from the **Users** pane, select one or more user names and drag them onto a workgroup name in the **Workgroups** pane. Users can belong to one or more workgroups.

Delegate roles to users

After adding users to workgroups, you'll need to delegate roles for users in each workgroup. Roles give users the ability to perform extra functions within a workgroup and are set on a user-by-user basis. Most users will do fine with the default role, while others will be assigned special abilities through the use of a different role.

When working with projects, you will need to have at least one person who is able to add, remove and organize fonts within the workgroup. You can assign the Font Administrator role to users in each workgroup who need this ability.

If you have teams that are continually changing, and require the addition and removal of users from projects, assign the Workgroup or Full Administrator setting to at least one user for each workgroup.

Administrators are able to log in to the User Management application and manage users. Having an additional Administrator can also be handy if your teams are located in different time zones and you need to manage workgroups in a timely fashion.

Before assigning roles, click each role name in the **Roles** pane. If these roles do not meet your needs, you can create a custom role (see **Custom roles** on page 30) to assign to users.

To delegate roles:

1. In the **Workgroups** pane, select the workgroup name.
2. In the **Users** pane, select the user that you want to update.
3. In the **Details** pane, click the **Workgroups** tab.
4. Select the workgroup name from the **Show permissions for Workgroup** drop-down menu.
5. Choose a new role for this user in the selected workgroup from the **Role in Workgroup** drop-down menu.
6. Click the **Save** button.

Configure user settings

After adding users, you need to determine the most appropriate font replication mode, synchronization and personal workgroup settings for each user. These settings control when fonts are brought down from the server to the client, and how long those fonts remain on the user's system. Typically, the default settings will work for most users, but for certain users exceptions can be made. These are configured on the **Settings** tab for each user.

- The default time between server syncs (see **Time Between Server Syncs** on page 38) should work for most installations. The exception may be a user who doesn't often need new or updated fonts. For these users, a longer synchronization interval can be set.
- The Font Replication mode controls when fonts are copied from the server down to the client computer. The default mode is **On-demand**, which gives users fonts only when they need to preview or activate them. The On-demand setting is typically the best choice for client computers that stay in the office. For users who are working on laptops and may need to work offline frequently, set the font replication mode to **All** (see **Font Replication Mode** on page 38). This ensures that all fonts in the Type Server are downloaded to the client, and always available for use offline.
- Enable personal workgroups (see **Manage a Personal Workgroup** on page 37) for users who need to add and activate fonts that they won't need to share with the rest of the workgroup. Server-based personal workgroups can be very helpful for users who work on multiple computers and need access to the same personal fonts on each computer. It can also be helpful for users who may need to experiment with a few fonts for a project before purchasing a large number of licenses and adding those fonts to a workgroup for other users. Otherwise, it's a good idea to have all users always add fonts to the main workgroup, and use sets to further organize fonts as necessary.

Add and organize fonts

After configuring users, distribute account login settings to users. Those who have permission can now begin adding fonts to each workgroup. Other client users are then able to activate and deactivate fonts as required for each project with the Type Client.

For more information about adding, organizing, and managing fonts, see the Universal Type Client User Guide and help system.

Full Access sample configuration

The most basic way to configure Universal Type Server is to place all of your fonts into a single workgroup and allow all of your users a very permissive level of access to those fonts. This method sacrifices some of the administration control available in Universal Type Server for the benefits having users police their own actions with fonts on the server.

Typically workgroups such as small design houses or prepress shops will choose this method of configuration.

The following setup instructions contain the recommended way to setup your Type Server to allow full access for all users. Your process may vary based on your group's needs.

Create the workgroup

The first step is to create the workgroup that will house all of your fonts.

1. Open your web browser and start the User Management application.
If it is already open, choose **Window > Users and Workgroups**.
2. In the **Workgroups** pane, click the **+** button. This opens the **New Workgroup** details pane.
3. Enter a name for the workgroup in the **Workgroup Name** field. This name is displayed in the client, and is where workgroup members will add and activate fonts.
4. Choose a role to be assigned to new workgroup members from the **Default Role** drop-down menu. Since all of your users will have the same level of access, it's a good idea to set a default role that isn't very restricting. If you choose **Default Role > Font Administrator**, this will allow any user to perform necessary organization and maintenance tasks using the Type Client and also gives your users a wide variety of abilities to add, organize and tag fonts within workgroups.
5. Click the **Save** button to add the new workgroup.

Create users

The next step is to create all of your users and add them to the workgroup.

To create a new user:

1. In the **Workgroups** pane select your new workgroup. Selecting the workgroup ensures that new users are automatically added to this workgroup.
2. In the **Users** pane, click the **+** button.
3. In the **New User** details pane, in the **Account** tab, enter the basic account information:
 - **Account Name:** Each user account name must be unique. It's best to use an account name that is short, easy to remember and does not include spaces or letter case variations.
 - **Full Name:** Required field. For ease of alphabetization, you can enter names in a "Last Name, First Name" format so that names can be easily sorted in the **Users** pane.
 - **Email Address:** Optional field.
 - **Password:** This case-sensitive field is optional. If left blank, a password is not required for this user to log in.
If you enter a password, enter it again in the **Confirm Password** field.
 - **Notes:** Enter any notes to appropriately identify the user.
4. Click the **Save** button to add the new user.
5. Repeat this process until all of your users are added.

Configure permissions

Since the Font Administrator default role is set for your only workgroup, all users will have the permission to perform most actions with the Type Client. Notable exceptions include the ability to access the Server Administration and User Management applications. Typically, these functions are accessed only by an IT professional. If you don't have a specific IT person, you may wish to enable a user to have Full or Workgroup Administrator permissions.

Configure user settings

After adding users, you need to determine the most appropriate font replication mode, synchronization and personal workgroup settings for each user. These settings control when fonts are brought down from the server to the client, and how long those fonts remain on the user's system. Typically, the default settings will work for most users, but for certain users exceptions can be made. These are configured on the **Settings** tab for each user.

- The default time between server syncs (see ***Time Between Server Syncs*** on page 38) should work for most installations. The exception may be a user who doesn't often need new or updated fonts. For these users, a longer synchronization interval can be set.
- The Font Replication mode controls when fonts are copied from the server down to the client computer. The default mode is **On-demand**, which gives users fonts only when they need to preview or activate them. The **On-demand** setting is typically the best choice for client computers that stay in the office. For users who are working on laptops and may need to work offline frequently, set the font replication mode to **All** (see ***Font Replication Mode*** on page 38). This ensures that all fonts in the Type Server are downloaded to the client, and always available for use offline.
- Enable personal workgroups (see ***Manage a Personal Workgroup*** on page 37) for users who need to add and activate fonts that they won't need to share with the rest of the workgroup. Server-based personal workgroups can be very helpful for users who work on multiple computers and need access to the same personal fonts on each computer. Otherwise, it's a good idea to have all users always add fonts to the main workgroup, and use sets to further organize fonts as necessary.

Add and organize fonts

You can now provide users with their access information and have them add fonts to the workgroup.

For the best organization within your workgroup, ask users to add fonts into sets that can then be shared with all users to keep everyone in sync.

For more information about adding, organizing, and managing fonts see the *Universal Type Client User Guide* and help system.

User roles

Roles control the permissions in the Global and Workgroup permission tabs of each user. Roles are basically a group of permission settings that can be applied simultaneously to a user that affects their abilities in the workgroup.

Roles are dynamic in that when you change a role setting, all users who have that role in any workgroup are immediately affected. So, if you add or remove permissions to a role, be aware that everyone with that role setting will obtain updated permissions. User Roles are also quite powerful because they allow you to change the abilities of a large number of users in many workgroups at one time.

Defining a user role strategy

Roles and workgroups

Roles allow administrators to quickly set up multiple users with a standard set of permissions. Even more efficiency is gained by applying a Default Role to a workgroup. That way, every user who is added to the workgroup receives that default role.

When organizing workgroups, you may want to organize fonts by what level of access that is required for users. Using this method, you can create your workgroups and assign a custom default role for each workgroup. This way, every user who is subsequently added to each workgroup is automatically assigned the default role. Users become almost secondary in this configuration.

For example, if a newspaper editorial department needs a specific group of fonts, yet those fonts are well-defined and these users won't need to choose new fonts, you can create a fairly restrictive role setting and set it as the default role for that workgroup. That way every user who is added to the workgroup will be restricted to using fonts as the administrator intends.

Users, roles, and workgroups

A user's role can vary from workgroup to workgroup. A user may have the Regular User role in one workgroup and the Font Administrator role in another. After you add a user to a workgroup, you can change that user's role as needed.

If a workgroup's default role is Regular User, and you need a user to be the Font Administrator, you can change this in the user's Workgroup permissions tab.

It's also important to note that permissions set for a role can be overridden for individual users in a workgroup. It is easy to give a user custom permissions in a workgroup without changing his role.

Roles and fonts

It's important to note that font information is stored on a server-wide basis. So, any changes to attributes, such as keywords and foundry information, are applied across all workgroup. So, it is important that you choose roles and permissions for your users appropriately.

For example, a user has the Font Administrator role in one workgroup, but only the Regular User role in another. That user can make changes to font attributes in workgroup where he is a Font Administrator. If a font exists in both workgroups, any changes to a font that the user makes as the Font Administrator will also appear in the other workgroup.

Default roles

Universal Type Server contains four predefined user roles. These roles are configured with commonly used settings, and can be used as-is or as a starting place for your own custom roles.

REMEMBER: You can override role-based settings by granting or revoking permissions on a user-by-user basis.

Predefined roles can be modified to meet your needs, but if you need different settings it is best to create a custom role (see **Custom roles** on page 30).

Font Administrator

The Font Administrator predefined role is configured for users who need a higher level of control over fonts in a workgroup. Users who are required to add fonts, and perform other organizational tasks such as assigning keywords and creating shared sets, should have the Font Administrator role.

Those with the Font Administrator role can do everything the Regular User role can do as well as:

- Add and remove fonts.
- Create and delete shared sets.
- Modify shared sets.
- Create, delete and apply keywords, styles, classifications, and foundries.
- Activate fonts across multiple workgroups.
- Modify font family groupings.

Since roles are set by workgroup, users may be members of multiple workgroups yet are assigned the Font Administrator role in only a few workgroups.

It's important to note that if a font information is stored on a server-wide basis. So if a font exists in multiple workgroups, and a user has the Font Administrator role in one workgroup, any changes made to the font as the Font Administrator will also appear in every other workgroup.

Preview-only User

The Preview-only role is similar to the regular user, except that users with this role cannot activate fonts, and cannot collect fonts for output.

A major use for the Preview-only user would be to create a workgroup where this is the default role, add several users to the workgroup, and include a Workgroup Administrator. The Administrator can then add fonts to the workgroup that the other members can preview.

This type of workgroup can act as a “font store” that allows your users to see the fonts that are available on your Type Server without having to consume a license for each font. Users can identify fonts they would like to have access to, then request that they be added to one of their other workgroups.

Regular User

The Regular User predefined role is configured for users who are mostly interested in finding and activating fonts. A regular user might not spend much time using the Type Client, and allow the auto-activation plug-ins to activate and deactivate fonts as required for each document and project.

Regular users can activate and deactivate fonts in workgroups for which they are members, apply keywords to fonts, and collect fonts for output.

The Regular User predefined role is the default role for workgroups in which a default role is not assigned. This means that any user added to a workgroup that does not have a default role set will automatically receive the Regular User role assigned for that workgroup.

Workgroup Administrator

The Workgroup Administrator role allows a Server Administrator to delegate the task of managing users in a workgroup. Workgroup Administrators have the same capabilities as Font Administrators, and can also create new users in the context of their workgroup, add existing user accounts to their workgroup, and remove users from their workgroup.

In addition, Workgroup Administrators using the Universal Type Client will have access to a special workgroup that shows all fonts in all workgroups that they administer. He can delete fonts from all his workgroups by deleting them from this workgroup, and can create non-share sets in this workgroup.

Assigning roles

There are two ways to assign user roles within a workgroup:

- Using a workgroup's default role
- Changing the user's workgroup permission setting

Setting a workgroup's default role

The easiest way to assign user roles is to have the workgroup do it for you. By setting a default role for a workgroup, that role is automatically assigned to each user subsequently added to the workgroup.

To set the default role for a workgroup:

1. Open your web browser and start the User Management application.
If it is already running, choose **Window > Users and Workgroups**.
2. In the **Workgroups** pane, select the workgroup.
3. In the **Details** pane, choose a role from the **Default Role** drop-down menu and click the **Save** button.

Existing members of the workgroup are not affected by the workgroup's default role change. Only users who are subsequently added are assigned the new default role.

Assigning roles by user

After users are added to a workgroup, you can update each user's role on a workgroup-by-workgroup basis. This is often necessary if a user was given the default role when added to a workgroup, and you want to assign a different role.

To update the role for a user in a workgroup:

1. Open your web browser and start the User Management application.
If it is already running, choose **Window > Users and Workgroups**.
2. In the **Workgroups** pane, select the workgroup.
3. In the **Users** pane, select the username.
4. In the **Details** pane, click the **Workgroup** tab.
5. Click the **Show Permissions in Workgroup** drop-down menu and choose the workgroup for which you need to modify the role. (Only workgroups in which the user is a member are displayed.)
6. Choose a new role from the **Role in Workgroup** drop-down menu.
7. Click the **Save** button.

Custom roles

In most instances, the predefined roles that come with Type Server should meet your needs. If you need to set specific role settings, you can easily create a custom role.

For example, a production environment could require special settings for everyone in the department.

These users interact with outside clients, who may supply fonts with their documents.

Production department users will need to add fonts to Universal Type Server, as well as collect fonts for use on other systems.

In this example, you could create a “Production” workgroup and an associated custom role, “Production User”.

The “Production User” role would have the permissions **Add/Remove Fonts**, **Activate Fonts**, and **Collect Fonts for Output**.

When you set the “Production User” role as the default role for the “Production” workgroup, then all users that you subsequently add to the workgroup will have this role, and the appropriate permissions.


To create a new role:

1. In the Management application, click **User Roles**.
2. In the **User Roles** work list on the left, click **+**.
3. In the **Role Settings** pane, change one or more of the permissions for the default role.
4. Click **Save As**, then enter a new name for the custom role and click **Save**.

To copy a predefined role:

1. In the Management application, click **User Roles**.
2. In the **User Roles** work list on the left, select a default role.
3. In the **Role Settings** pane, enter a role name.
4. Enable or disable user permissions (see *Role-based permissions* on page 42) for the new role.
5. Click **Save** to save the new role.

To delete a custom role:

1. In the Management application, click **User Roles**.
2. In the **User Roles** work list on the left, select the role to delete.
3. Click **Delete** , then click **Delete** to remove the role.

If you delete a custom role that is assigned to a user, that user’s role is changed to the Regular User predefined role.

Workgroups

In Universal Type Server, fonts are organized into workgroups—collections of fonts intended for a specific job description, division, publication, or other grouping. Workgroups are like separate databases of fonts, each with its own group of users. The Server Administrator decides which users belong to each workgroup, and has the ability to modify user permissions on a user-by-user basis for each workgroup. To help facilitate setting user permissions, each workgroup has a default role, which sets the initial permissions for users added to the workgroup.

Users can be members of one or more workgroups, and a user's capabilities can vary from workgroup to workgroup. So, a user could be able to add and remove fonts in one workgroup but not in another.

To maintain any existing organization you have for fonts, you can add collections of fonts to Universal Type Server as workgroups. For example, if your fonts are organized by department, you can create department-based workgroups. Teams for each account, magazine division or publishing team could have their own workgroups. You can also create new workgroups using fonts already in existing workgroups and you can change which fonts are in which workgroups.

Not to be confused with font sets—subsets of fonts within a workgroup—workgroups go beyond grouping fonts to controlling usage and access.

When you create users, you specify workgroups to which they belong. In many configurations, users will belong to only one workgroup (although they can simultaneously belong to and activate fonts in multiple workgroups).

For example, a magazine publisher may have three font workgroups: **Editorial**, **Art**, and **Production**.

- The **Editorial** workgroup contains fonts used in body copy. Writers and editors are members of this workgroup, and are given the permission to activate fonts, but aren't allowed to add, delete, or collect them.
- The **Art** workgroup contains all of the fonts that the company owns; the graphic designers can activate and add fonts, but they can't delete or collect them.
- The **Production** workgroup encompasses all of the company's fonts along with all of its advertisers' fonts. Users of this workgroup are given permission to add, delete, and collect fonts.

Some environments choose a simpler approach and only create one workgroup to which all fonts are added, and all required employees are added as users. In these environments, it's a good idea to create a custom role that allows users appropriate access to fonts, and set that role as the default for the workgroup.

Defining a workgroup strategy

Before you start creating workgroups of fonts, you need to decide how you want to structure them. Unlike the way you probably have been managing fonts— by font name, foundry, etc.—think more about who needs the fonts than about characteristics of the fonts.

For example, don't create workgroups based on font characteristics such as foundries or classes. If you do, most of the users will end up needing access to fonts in many workgroups, making access difficult to manage. Users are able to sort fonts based on foundry and class in the Universal Type Client, so there is little need to organize fonts by foundry in separate workgroups.

Another important consideration when planning workgroups is that, in general, each document you design or output should use fonts from only one workgroup. So each workgroup should contain all the fonts necessary to complete the projects its users are involved in. Since users can work in multiple workgroups, it is important to configure workgroups so that users aren't confused about which workgroup they should be using.

It is easiest to select a sample configuration (**Sample configurations** on page 19) example and follow the detailed instructions for setting up your workgroups using one of these models. If your environment differs and requires a specialized configuration, spend a few minutes examining the fonts required in your environment as well as your user's font needs.

Creating and editing workgroups

New workgroups are created through the User Management application.

To create a workgroup:

1. Open your web browser and start the User Management application.
If it is already running, then choose **Window > Users and Workgroups**.
2. In the **Workgroups** pane, click the **+** button. This opens the **New Workgroup** details pane.
3. Enter a **Workgroup Name**. This is the name that is displayed to users who are members of the workgroup.
4. Choose a **Default Role** from the drop-down menu.
The default role is set for users when they are added to the workgroup. When used properly, the default role can make adding users and configuring permissions for a workgroup a snap.
5. Enter any **Notes** to help you identify the fonts that will be contained in this workgroup. Notes are only visible in the User Management application, and are not visible in the client.

After creating a workgroup, the next step is to add users to that workgroup. After adding users, those who have the appropriate permissions can add fonts to the workgroup using the Universal Type Client. It's important to remember that anything to do with the physical manipulation of fonts is performed using the Type Client.

After creating a workgroup, you may find that there's another name that more accurately describes the workgroup. You can easily change this as well as the default role after a workgroup is created.

To edit an existing workgroup:

1. Open your web browser and start the User Management application.
If it is already running, then choose **Window > Users and Workgroups**.
2. In the **Workgroups** pane, select the existing workgroup.
3. In the **Detail** pane, change the workgroup name and/or default role and click the **Save** button.

NOTE: Any changes to the default roles affect only users subsequently added to the workgroup; these changes do not affect users who are currently members of the workgroup.

Deleting a workgroup

When a workgroup no longer serves a purpose, you can delete it. It's important to understand what happens to fonts contained within a workgroup when it is deleted.

- The users assigned to that workgroup remain in Universal Type Server.
- The workgroup is removed from the list in the Universal Type Client as well as from the User Management application.
- If users have fonts from the workgroup active, the fonts stay active until the users shut down their computers or choose **Server > Forget Connection**.
- If fonts in the deleted workgroup belong to other workgroups, they remain in the Type Server datastore.
- If fonts in the deleted workgroup were exclusive to that workgroup, the fonts are deleted from the server entirely.
- All font sets within the workgroup are deleted.

To delete a workgroup:

1. Open your web browser and start the User Management application.
2. In the **Workgroups** pane, select the workgroup name.
3. Click the - button.
4. Click the **OK** button to confirm.

Users

A user is any individual who needs to connect to Universal Type Server to access fonts. Each user will have his own unique account name, settings, and permissions.

You can add as many users as required to the Type Server, regardless of how many user connections you have purchased. Your license controls how many concurrent connections are allowed to the server. Therefore, you can create a user for anyone who needs access to fonts— every full-time employee, part-time employee, intern, client, etc.

When creating users, the administrator specifies all basic user login information: username, full name, email address, and password.

After the user is created, users are then added to workgroups. When a user is added to a workgroup, the user is automatically assigned the default role in that workgroup. The default workgroup role sets a wide variety of user permissions, and is handy for quickly setting consistent permissions for all users in a workgroup. If special user permissions are required, they can be set globally for that user or on a workgroup-by-workgroup basis.

User logins can be used with the Universal Type Client on either macOS or Windows. The client is only able to use font files that are compatible with the current operating system, so users who work on both platforms may have different fonts available for use. For example, Windows-based PostScript fonts are not compatible with the macOS, so these fonts cannot be activated or collected by the macOS client.

NOTE: To prevent confusion, control access, and aid in troubleshooting, do not give multiple users the same account name. For example, if you give all graphic designers the account name “Creative,” it will be difficult to determine which user added a corrupt font.

The Server Administrator

There is only one Server Administrator account per Universal Type Server installation. The Server Administrator can perform any administrative task from the Server Administration and User Management applications as well as any task in the Universal Type Client.

Most importantly, the Server Administrator is the only user account that is able to assign or remove the **Is Full Administrator** setting (see *The Full Administrator setting* on page 41), and cannot be deleted from the server.

Typically, the only time you would use the Server Administrator account is during the initial configuration of the Type Server, and when you need to add or remove users with the **Is Full Administrator** setting.

The Server Administrator username is always set to **administrator** and the default password for the account is **password**. For optimal security, change this password as soon as possible after installation.

IMPORTANT: Do not lose the Server Administrator password! This is the **only** username and password that cannot be reset or recovered. If you do lose your Server Administrator password, please contact Extensis technical support for assistance. See *Support* on page 62 for contact information.

Creating and editing users

Users can be added by Full Administrators and the Server Administrator.

To create a new user:

1. Open your web browser and start the User Management application
If you already have it open, then choose **Window > Users and Workgroups**.
2. In the **Workgroups** pane select a workgroup to which you would like to add a user. To add a user without specifying a workgroup, select the **All Users** workgroup.
3. In the **Users** pane, click the **+** button.
4. In the **New User** details pane, click the **Account** tab and enter the basic account information:
 - **Account Name:** Each user account name must be unique. It's best to use an account name that is short, easy to remember, and does not include spaces or letter case variations.
 - **Full Name:** Optional field.
 - **Email Address:** Optional field.
 - **Password:** Optional field. If left blank, a password is not required for this user to log in. If you enter a password, enter it again in the **Confirm Password** field.
 - **Notes:** Enter any notes to appropriately identify the user. This information is only visible in the User Management application.
5. Click the **save** button to add the new user.

After creating a new user, add the user to workgroups as required.

Typically, default user settings are all that is required for most users. The appropriate user permissions are configured by the default workgroup role when you add this user to a workgroup. Although many settings and permissions options are available to modify on a user-by-user basis, it's likely that you will never need to do so.

NOTE: All font manipulation happens in the Universal Type Client. Add fonts, remove fonts, add keywords, and organize fonts into sets using the Type Client.

You can edit the user account information, settings, and permissions after the user is created.

To edit an existing user:

1. Open your web browser and start the User Management application
If you already have it open, then choose **Window > Users and Workgroups**.
2. In the **Workgroups** pane select any workgroup to which the user belongs.
3. In the **Users** pane, select the user to edit.
4. In the **Details** pane, click the **Edit** button.
5. Update any of the user account information, settings, and permissions.
6. Click the **Save** button.

Settings

User settings control a number of options about how users are given access to fonts, as well as enabling administration privileges.

Change Password

The Change Password setting allows the user to update their password directly from the Universal Type Client by choosing **Server > Change Password**.

Alternately, Full Administrators can change a user's password directly through the User Management application.

NOTE: If you are bound to a Directory Service and using Kerberos for single sign-on, the **Change Password** command does not have any affect on domain passwords. This command only affects Universal Type Server passwords.

Activate Fonts Across Workgroups

All users are able to simultaneously activate fonts in any workgroups to which they are a member. The Activate Fonts Across Workgroups setting applies only to the auto-activation plug-ins installed on the client's system.

The Universal Type Server plug-ins are typically limited to activating fonts from a single workgroup. When the user launches an application for which the Type Server plug-in is enabled, the user is prompted to select a workgroup of fonts to use for auto-activation. Enabling this permission allows the plug-ins to activate fonts from workgroups to which the user has access and are enabled in the plug-in.

Due to the fact that you can't guarantee that all users will have access to all fonts, it is best to design documents to only use fonts from a single workgroup. This way you can guarantee that all users of that workgroup will have the fonts necessary for the document. The risk of enabling this feature is that a user could unintentionally create a document that uses fonts from multiple workgroups.

Manage a Personal Workgroup

At the discretion of the administrator, users can add fonts to their own personal workgroup. Personal workgroups can be either server-based or client-based.

- **Server-based personal workgroups** are available on any computer that the user logs in to. This is a good setting if you want to be sure that personal workgroups are available from any computer where the user logs in, and to ensure that there is always a backup of personal workgroup fonts on the server.
- **Client-based personal workgroups** are housed only on a single computer so the fonts contained within these workgroups can vary from computer to computer for the same user account. Client-based workgroups have the advantage that if a user attempts to add corrupt fonts, the corrupt fonts are placed into a “corrupt fonts” set within the client-based personal workgroup.

Personal workgroups are useful when experimenting with fonts for which you may only have a single license. For example, say a graphic designer who is working on a new client’s identity is experimenting with fonts that are not part of the company’s licensed font library. The designer believes the fonts are ideally suited to the job and the administrator does not want to squelch the designer’s creativity. But, since the company doesn’t yet own a large number of licenses for this font, you don’t want to add them to the server for an entire workgroup to use. The solution is to have the designer add the fonts to his or her personal workgroup. If the client approves the fonts, you can purchase additional licenses and add the fonts to the appropriate workgroups.

Access to a personal workgroup is a user-based permission, so some users might have them while others do not. For example, graphic designers are likely to need a personal workgroup, but editors are not. Since the fonts are for private use, users can add, delete, activate, add attributes and collect for output from their personal workgroup.

IMPORTANT: Changing the personal workgroup setting after a user has already added fonts and sets to that workgroup will result in the deletion of all existing fonts and sets in the user’s personal workgroup. It is best to specify the personal workgroup setting when adding a user and not modify it after a user has started to work with the personal workgroup.

Enforce System Font Policy

System Font Policies are used to control which fonts can be added to the system font folder on a user’s computer.

When a system font policy is enforced for a user, the Universal Type Client periodically checks which fonts are in the system font folders and removes any unapproved fonts.

For complete details about System Font Policies, see **System Font Policy** on page 16.

Disable Startup Sets

This permission disables the activation of startup sets for the selected user. You may want to do this for users who may be part of a workgroup, but not need to activate fonts that are typically activated for all users of the workgroup by startup sets.

Users will still see startup sets in their workgroup, but the fonts are not be automatically activated. Fonts in these sets can be manually activated if desired.

Time Between Server Syncs

To keep all of the fonts, font attributes, and user permissions current in all Universal Type Clients, the client synchronizes data with the server on a periodic basis.

How often each user account synchronizes with the Universal Type Server is controlled by the **Time between server syncs** user setting. This setting is adjustable so that administrators can help minimize network traffic while ensuring that all clients are kept up to date.

Synchronization takes place only while the client is connected and working online with the Type Server. After working offline, the client automatically synchronizes with the server, downloading all attribute changes and permissions. Fonts are downloaded to the client based on each user's **Font Replication Mode** (see **Font Replication Mode** below).

The synchronization interval for each user can vary based on that user's needs. For example all users of a production department may work on the same project at the same time. All of these users will need the same fonts at the same time, so a very short synchronization interval would benefit this environment. Alternately, a copy editor who works on just a few projects with a fairly static group of fonts would not need to be constantly synchronizing with the server. A longer interval, perhaps daily, would be more appropriate for this user.

A more frequent synchronization setting can create unnecessary network traffic and potentially slow down your network. So, set your synchronization frequency to the a longer interval to keep network traffic to a minimum.

Font Replication Mode

The **Font replication mode** setting controls when fonts are downloaded to the client system. Font replication is important to understand to keep your network traffic to a minimum and to maintain healthy server performance.

Depending upon the type of use that you expect, and to minimize network traffic, each user may have a different replication mode.

- **All:** This replication mode automatically downloads all fonts from the workgroups to which the user is a member. This is a good setting for users who will frequently be working offline, and who need access to a wide variety of fonts.
- **On-Demand:** This mode downloads fonts as they are required. Previewing, activating and collecting fonts initiates the download of selected fonts to the client computer. When fonts are no longer required, they are removed and are not stored in the Type Client font cache. Only fonts that are currently active or being previewed are available while working offline.
- **On-Demand Local Cache:** This replication mode downloads fonts to the client as they are requested. Previewing, activating, and collecting fonts all initiate the download of a font. After being downloaded from the server, fonts are not removed and remain in the Type Client cache. Cached fonts are available for activation, preview, and collection while working offline.

Font replication and licensing issues

The font replication mode that you choose can be affected by how you expect to account for the licenses for your purchased fonts. Fonts are each small pieces of software, each with their own license. You may have purchased fonts as part of a large library or one at a time. Either way, you need to be sure that you're using fonts in a way that you aren't compromising the font's license.

- The **All** replication mode downloads all workgroup fonts to a user's system. Each and every font in workgroups to which the user is a member is always downloaded to the user's system, and thus may require a license for that font file.
- The **On-Demand** replication mode only downloads files to a user's system when they are required. When the font is no longer in use, it is removed from the system and no longer consumes a font license.
- The **On-Demand Local Cache** mode only downloads fonts as requested. So, if a user has previewed or activated a font, it is considered in-use by the system, and consumes a font license at that point. Since fonts are not removed from the user's system, all fonts remaining on the user's system continue to consume licenses.

Updating user settings for multiple users

Settings can be updated for multiple users at the same time by selecting multiple users in the User Management application.

TIP: You may also want to designate default server settings (see **New user defaults** on page 14) that are automatically applied to users as they are created.

The following settings may be changed for multiple users at the same time:

- Change password
- Activate fonts across workgroups
- Time between server syncs
- Font replication mode
- Has Personal Workgroup (server-based or client-based)
- Enforce System Font Policy
- Disable Startup Sets

NOTE: The Full Administrator setting (see **The Full Administrator setting** on page 41) and other account settings such as password, full name, and notes cannot be updated for multiple users at the same time. It is also important to note that users who are currently Full Administrators cannot be updated in a group with other users, and must be updated individually.

To edit the user settings for multiple users:

1. Open your web browser and start the User Management application.
2. In the **Workgroup** pane, select a workgroup.
3. In the **Users** pane, select multiple users by **SHIFT**-clicking the first and last users, or by **CTRL**-clicking (Windows) or **COMMAND**-clicking (Mac) multiple users in the list.
4. In the **Details** pane, select the settings to apply or remove from all selected users and click the **Save** button.

TIP: Use the **Roles** feature (see **User roles** on page 27) to quickly apply and update permissions for multiple users.

Adding users to workgroups

For a user to have access to fonts in a workgroup, you must first add the to the workgroup. You can add a user into a workgroup when you create it, or you can drag an existing username into a workgroup.

To add an existing user to a workgroup:

1. Open your web browser and start the User Management application.
If it is already running, choose **Window > Users and Workgroups**.
2. In the **Workgroups** pane, select the **All Users** workgroup, or any other workgroup to which the user currently belongs.
3. Drag a user name from the **Users** pane into any other workgroup.
The user is automatically assigned the default role in the new workgroup.
4. You can now edit the user's permissions for the new workgroup in the **Workgroup** tab.

To add multiple users to a workgroup:

Follow the steps above, but select multiple users and drag the selected group from the Users pane into a workgroup.

(To select multiple users, hold down the **COMMAND** key (Macintosh) or **CTRL** key (Windows) and click on each user.)

To add users to multiple workgroups:

1. Select the users.
2. Right-click on one of the selected users.
3. Choose **Add to Multiple Workgroups** from the pop-up menu.
4. In the resulting dialog, check the box next to each workgroup that you want to add the users to.
5. Click the **OK** button.

You can also choose **Add to All Workgroups** from the pop-up menu to add the selected users to all workgroups.

Applying a role

You can apply a different role to a user for each workgroup they are a member of.

To change a user's role for a specific workgroup:

1. Click **Users** in the workspace list at the top of the window.
2. Select the user in the list on the left.
3. In the **User Account Data** panel, click **Permissions**.
4. Select the workgroup from the **Permissions for Workgroup** pop-up menu.
5. Select the role that you want to assign to the user in that workgroup from the **Role Assigned in Workgroup** pop-up menu.
6. Click **Save**.

Permissions

Permissions control what a user is allowed to do in workgroups. Permissions can be set globally, so that they affect all workgroups for a user, or on a workgroup-by-workgroup basis.

Permissions control the ability to:

- Add and remove fonts
- Collect fonts for output
- Create, delete and modify shared sets
- Create and delete startup sets that are permanently active for all users
- The ability to create, delete and apply attributes to fonts

In most cases, it is best to allow permissions to be set by the user's role within each workgroup. Yet, for some users, you will need to specifically edit user permissions. Typically, you will need to edit permissions for users who need extra abilities within a workgroup. For example, in a workgroup where all users are given the Regular User default role, you may want to give one user responsibility for creating keywords. To do so, for this user the administrator would grant the **Create and Delete** permission for **Keywords**.

The Full Administrator setting

The **Is Full Administrator** setting allows a user to perform most of the administration tasks available through the User Management application.

For each Type Server, typically only one or two users will have the **Is Full Administrator** setting. The **Is Full Administrator** setting can only be assigned by the Server Administrator (see *The Administrator account* on page 13).

Full Administrators are users who are primarily responsible for the high-level workgroup and user organization, and are likely members of the IT department.

The **Is Full Administrator** setting allows a user to:

- Assign the Workgroup Administrator permission to a user.
- Create and delete users in any workgroup.
- Modify permissions and settings for any user in any workgroup.
- Rename and regroup font families.
- Delete any sets that have been shared by other users.
- Create and edit font licenses.
- Create and edit Directory Service mappings.

Global permissions

Global permissions grant users permission to perform actions across all workgroups to which the user has access.

All global permissions are set by the user's role within each workgroup, and using roles is the recommended method for applying user permissions.

Though, there may be some instances where you want to globally grant a single user extra responsibilities across all workgroups. For example if there is a user who will be primarily responsible for collecting fonts from multiple projects for archiving, the administrator would enable the **Collect Fonts for Output** global permission for that user.

Globally granted permissions override any permissions set by a user's role in the workgroup, as well as any custom workgroup permissions.

Global permissions include both font-based permissions and font attribute permissions.

Font-based permissions include the ability to:

- Collect Fonts for Output
- Add and Remove Fonts
- Create and Delete Startup Sets

Font attributes are only stored within Universal Type Server and never applied to the source font file. Font attributes include all font licensing, keywords, styles, classifications, foundries and font family information. Administrators can grant or deny the ability to create, delete, and apply:

- Licenses
- Keywords
- Styles, Classifications, Foundries, and Families

Role-based permissions

The following permissions can be granted or denied to each user on a workgroup-by-workgroup basis. A user's role for each workgroup is set in the Workgroup permissions tab of the User Management application.

Role-based permissions can be overridden, allowing the administrator to grant or deny permissions globally for a user, or on workgroup-by-workgroup basis for each user.

Each permission has a three-state check box that switches between the role permission and whether the permission is custom granted or denied. If a permission is granted globally, it cannot be modified in the Workgroup tab.

Add and Remove Fonts

This permission allows the user to add font to and remove fonts from a workgroup. This is an important responsibility, because if a font is removed from a workgroup, and if it doesn't belong to any other workgroup, it is immediately removed from the Type Server. Enable this permission for users who are aware of this responsibility.

Collect Fonts for Output

This permission allows users to export fonts from the Type Server to a location outside of the server. Users may need to do this when sending a project from one company location to another.

NOTE: Remember that fonts are individual pieces of software, and each font has specific font licensing requirements. Only collect and provide fonts to others whom you know have purchased the appropriate font licenses.

Create/Delete Shared Sets

All users can create and modify their own sets in all workgroups for which they are a member. The sets are associated with each username and are therefore available only to that user.

To allow the user to share a sets with the entire workgroup, check the box labeled **Create/Delete Shared Sets**. This can be helpful when users are creating a group of fonts to be used with a project. When the user finalizes the set and wants to bring others onto the project they share the set with the entire workgroup. So, in general, reserve this permission for project leaders.

Enabling this permission also allows the user to unshare any set that they have shared, making it unavailable to others in the workgroup. The owner can also delete any sets that they have shared.

Modify Shared Sets

Check the box labeled **Modify Shared Sets** to allow the user to add and remove fonts from all shared sets, as well as rename any shared set. The user can modify any shared set, including those created by other users.

Create and Delete Startup Sets

Enabling this permission allows users to make any set permanently active for all users of the workgroup. Fonts in startup sets cannot be overridden or deactivated by client users. This is handy to activate a standard set of corporate fonts for all users in a workgroup.

The only way to deactivate or override fonts in startup sets is to remove the startup status of the set. Only users who have this permission are to disable a startup set. Removing the startup set status allows all users of the workgroup to deactivate and override fonts in the set.

Font attribute options

Controlling font attributes helps organize fonts. Font attributes includes font licenses, keywords, styles, classifications, foundries, and family information. Font attributes are stored only within Universal Type Server and in no way affects your original font files, so attributes are helpful for organizing and finding files. For example, keywords can be added to all fonts used for a project, client, or print job. Fonts can later be found using this information.

Administrators can set these permissions using three methods:

- Set by the user role
- Custom granted or denied in a user's Global permissions
- Custom granted or denied in a user's Workgroup permissions

All permissions can be set so that the user can create and delete attributes, or merely apply that item to fonts. For example, you might have one person who creates your list of keywords, yet everyone might have the ability to apply keywords to fonts.

Keywords: Keywords are a good way to track fonts. You can create a keywording strategy that helps you track which fonts are used for specific projects or clients. As with the example used above, you may only have a few users who can create and delete keywords, but many users who are able to apply them to fonts.

Styles, Classifications, Foundries, and Families: Enable this permission for users who need to modify Styles, Classifications, Foundries and Families. Typically these users create fonts or are those who absolutely know which foundry fonts came from. Enabling this permission also allows users to change how the Type Client displays font family information. For example, if you believe that a font would better belong in another family group, you can drag that font file to another family.

Workgroup permissions

Workgroup permissions are permissions that are restricted to a specific workgroup. Administrators can use this tab to grant or deny permissions for each user on a workgroup-by-workgroup basis.

Permissions on the **Workgroup** tab are broken down for every workgroup to which the user belongs. Use the **Show permissions for Workgroup** drop-down menu to change which workgroup permissions are displayed.

All of the workgroup-based permissions can be set by the user's role in the workgroup, although custom permissions can be granted or denied.

NOTE: If a permission is granted or denied in the **Global** permissions tab, it cannot be modified in the **Workgroup** tab.

Use the **Role in Workgroup** drop-down menu to select the user's role for the workgroup displayed in the **Show permissions for Workgroup** menu above.

A star * displayed next to the **Role in Workgroup** drop-down menu indicates that there have been custom workgroup permissions applied in the **Workgroups** tab. This is an easy way to see if the workgroup permissions are different than the default role permissions.

Font-based permissions can be granted or denied on a workgroup level. These include the ability to:

- Collect Fonts for Output
- Add and Remove Fonts

All users can create their own sets within a workgroup. For sets to be visible to other users, the set must be shared within the workgroup. As an example, you may want to allow a user to create and delete shared sets, for a workgroup, but restrict their ability to modify the shared sets from other users. Shared set permissions include:

- Create and Delete Shared Sets
- Modify Shared Sets
- Create and Delete Startup Sets

Font attributes are only stored within Universal Type Server and never applied to the source font file. Font attributes include all font licensing, keywords, styles, classifications, foundries, and font family information. Administrators can grant or deny the ability to create, delete, and apply:

- Licenses
- Keywords
- Styles, Classifications, Foundries, and Families

Active Directory

Universal Type Server can connect with your organization's Active Directory service to give AD users access to Type Server workgroups.

You can:

- Map Active Directory users to Type Server workgroups, allowing those users to log in to Type Server using their network login credentials.
- Map AD groups to workgroups, so changes in AD group membership are automatically reflected in Type Server workgroups.
- Use Kerberos Single sign-on so users only need to log in to their workstation to have access to the Type Server.

There are two parts to configuring Universal Type Server for Active Directory:

Connecting to the Active Directory service below

Mapping Active Directory users to workgroups on page 47

There are additional steps you can take to make user log-in more seamless and secure:

Kerberos Single sign-on on page 48

Configuring the client software on page 51

Connecting to the Active Directory service

NOTE: Only the Type Server administrator account can create a Directory Services configuration.

In the Management application, click the account menu (**Administrator**) at the top right of the main window, then choose **Directory Services**.

Click the **Configuration** tab in the Directory Service dialog.

If there is an existing configuration that you don't want to use, click **Delete** to remove it.

Connection

In the **Connection** pane, enter the connection settings of your Active Directory service.

Hostname: The IP address or DNS name of your AD server.

Port: The port to connect to on the AD server. You can assign different ports for secure (SSL) and standard (LDAP) connections. Select the port to use.

Username: Enter an AD user name that has permission to query the AD service. Enter the user name as one of:

- **domain\user**, such as **mycompany\jsmith**
- **user@realm**, such as **jsmith@mycompany.com**
- The fully qualified LDAP distinguished name (DN), such as **uid=jsmith,cn=users,dc=MARR,dc=MYCOMPANY,dc=COM**

Password: Enter the password for the user name that you entered.

IMPORTANT: Once you have successfully configured your AD connection, you cannot change the **Hostname** through this pane (for instance, if you move your Active Directory service to a new server system). You can either delete the configuration and create a new one (and lose all your existing mappings), or see the article [Changing the Configuration in Directory Services](https://help.extensis.com/hc/en-us/articles/360039840713).

Update Policies

Specify when the Type Server syncs with the Active Directory service, and what happens to AD users that have been deleted.

Sync with Directory Service: Choose to have your Type Server synchronize with the Active Directory service once a day at a specific time, or at more frequent intervals. (Any change that you make to user mappings will be synchronized immediately, regardless of this setting.)

Delete UTS users when removed from Directory Service: When this option is turned on, then when a user is removed from the Active Directory service, their account will also be removed from your Type Server.

When this option is turned off, then when a user is removed from the AD service, their Type Server account will be converted to a native account. If it previously did not have a native password assigned, the password will be the same as the user name. (A user can change their native password from within the Universal Type Client.)

Client Authentication

Choose the style of authentication you will use for Active Directory users connecting to your Type Server.

LDAP Bind: AD users log in with their network login credentials (user name and password).

Single sign-on with Password: You will need to enter the Service Principal Name and password. See *Kerberos Single sign-on* on page 48.

Single sign-on with Keytab: You will need to have copied your keytab file to your Type Server, then enter the Service Principal Name. See *Kerberos Single sign-on* on page 48.

NOTE: For Single sign-on options, click **Test** to ensure that your connection is working.

Specify the behavior of native accounts.

Enable UTS Usernames and Passwords: If the **Delete UTS users when removed from Directory Service** option is turned on (as described under *Update Policies* above), then this settings has no effect whether turned on or off.

If the **Delete UTS users...** option is turned off and this option is turned on, a user can use either their Active Directory or native password to log in. (If you don't specify a native password for the user account, it will default to the same as the account's user name.)

If this option and the **Delete UTS users...** option are both turned off, then the user will only be able to log in using their Active Directory password. If the user account is deleted from the AD service, the user can still log in using their native account.

Once you have completed the **Configuration** settings, click **Save**. (This automatically switches to the **Mapping** tab of the Directory Service dialog.)

Mapping Active Directory users to workgroups

NOTE: Only the Type Server administrator account, or an account configured as a Full Administrator, can map Active Directory users to Universal Type Server workgroups.

In the Management application, click the account menu (**Administrator** or your Full administrator account name) at the top right of the main window, then choose **Directory Services**. (If **Directory Services** is not available and you are logged in with a Full Administrator account, then the Type Server administrator needs to create an Active Directory configuration.)

If you have already created an Active Directory configuration, the **Mapping** tab will be displayed. (If the **Configuration** tab is displayed, you need to enter the information about your AD server and set some policies. See **Connecting to the Active Directory service** on page 45.)

You can map Active Directory accounts to workgroups you have set up on your Type Server. If you have no workgroups configured, the Management app will prompt you to create one. (If you choose not to create a workgroup at this time, you will be returned to the main window.)

Using the Directory Service Browser

The Directory Service Browser allows you to query your Active Directory server to locate users, distribution groups, organizational units (OUs), and security groups.

The **Directory Service Accounts** list shows the results of the query.

The search base

A query is basically the combination of a search base and query filter. The search base can be used to restrict your search to just one part of the LDAP directory. This can be especially handy if your Directory Service is configured to include discrete branches of users and groups by location or department.

The query filter

The query filter helps you locate users, groups and OUs within the search base.

You can access a number of pre-built query filters from the **Query** menu.

All Groups: Displays all groups within the search base.

Organizational Units: Displays all OUs in the search base.

Distribution Groups: Displays all distribution groups within the search base.

Security Groups: Displays all security groups within the search base.



Users: Lists all users; excludes all groups.

At the bottom of the **Query** menu, you can choose **Search** to search for users by name. You can search if a user name **contains**, **starts with**, or **equals** the entered text.

To map users:

1. Select a workgroup from the **Workgroup** menu in the **UTS Workgroups** pane on the right. You can also click **+** to create a new workgroup immediately.
2. Select one or more users or groups in the **Directory Service Browser** on the left.
3. Drag the selected users into the **Source | Role** list on the right.
You can use the menu at the right of each **Source | Role** entry to specify the role for each user (or all users in a group).
4. Click **Save** to save your user mapping.

Other details

1. You can select a user, group, or even a single group member in the **Source | Role** list and click **Delete Source**  to remove just that user or group from the mapping.
2. You can select a user in the **Directory Service Accounts** list, then click **Exclude User** . This will add the user to the **Source | Role** list as an Excluded User. This can be convenient if a user should always be excluded from your Type Server, no matter how their Active Directory group membership may change. (This may be true of contractors, for example.)

Kerberos Single sign-on

Kerberos is a secure protocol for authenticating users. With Kerberos, a user's password is never transmitted.

Single sign-on allows a user to log in once and gain access to multiple unrelated services. A familiar example is when a user logs in to a network workstation and can access shared network drives, email, and a corporate intranet without additional login prompts.

Universal Type Server can utilize Kerberos Single sign-on to make user connections simple and secure. With Kerberos Single sign-on in place, users can log in to their workstation and start interacting with Universal Type Server without any additional steps required.

The basic steps to configure Kerberos Single sign-on with Universal Type Server are as follows:

1. Create a Service Principal for your Type Server in your Active Directory (AD) service.
2. Optionally export a keytab file from your AD service and store it on your Universal Type Server.
3. Specify your Single sign-on method of Client Authentication when you connect your Type Server to your AD service.
4. Optionally provide end users with a configuration file that allows Universal Type Client to identify your Universal Type Server and connect automatically without input from the user.

The keytab option

The keytab file is an encrypted file that is stored on the Universal Type Server. This file, which is created by your Active Directory service, allows Universal Type Server to perform Kerberos authentication without the need to store a password locally.

The keytab file provides the strongest security available under Kerberos authentication.

The config file option

To allow Universal Type Client and Core Client users to connect quickly with Universal Type Server, administrators can create and deploy a configuration file that contains connection information. When this file is placed on each client computer, the login dialog is pre-filled with the correct server address and port.

When used in conjunction with Kerberos authentication, this can provide hands-off login to Universal Type Server.

This can be especially useful on workstations that are shared by multiple users with unique log-ins; Universal Type Client will connect automatically using the network login credentials for each user.

Configuring Kerberos for Active Directory

Even though Active Directory is Windows-based, Universal Type Server installed on either macOS or Windows Server can connect to an Active Directory service. Mac and Windows Universal Type Clients and Core Clients can also utilize Kerberos Single Sign-On under Active Directory.

Creating the Service Principal Name (SPN)

Because Universal Type Server is a Java enterprise service, Active Directory treats it as a Unix service, not a Windows service. In order for Single Sign-On clients to connect to a non-Windows service like Universal Type Server, Active Directory requires a Service Principal Name associated with a user account representing the service.

At its simplest, a Service Principal Name is of the form **<service_type>/<host_address>**. For Universal Type Server, the **<service_type>** must match the name of the Active Directory user account. **<host_address>** can be the IP address or fully-qualified domain address of your Universal Type Server.

Create a user account:

1. Click **Start > Programs > Administrative Tools > Active Directory Users and Computers**.
The account name can be anything but must be unique. It will also be used as part of the Service Principal Name that your Type Server uses to authenticate domain users.
2. Give the account a non-expiring password.

Map the account to the Service Principal Name:

1. Open a command prompt window.
2. Enter the following command. Replace the parameters enclosed in <angle brackets> with information appropriate to your environment.

```
ktpass -princ <service_account>/<host_address>@<REALM> -mapUser <service_account> -pass <service_account_password> -ptype KRB5_NT_PRINCIPAL
```

 - **<service_account>**: The Active Directory user account you created previously.
 - **<host_address>**: The IP address or fully-qualified domain name of your Universal Type Server.
 - **<REALM>**: The realm where your Kerberos database is stored, in ALL CAPS.
 - **<service_account_password>**: The password for the Active Directory user account.

The command output will indicate whether the mapping was successful.

Creating a keytab file for Active Directory

This step is only necessary for configurations using Kerberos Single Sign-On with Keytab authentication.

Create the keytab file:

1. Open a command prompt window.
2. Enter the following command. Replace the parameters enclosed in <angle brackets> with information appropriate to your environment.
ktpass -out <keytab_file_path> -princ <service_principal_name>@<REALM> -mapUser <service_account> -pass <service_account_password> -ptype KRB5_NT_PRINCIPAL -cryptoALL

- **<keytab_file_path>**: The complete path where the keytab file will be generated. You will eventually move the file from this location so it can be anywhere that you have write access. The keytab file must be named **universaltype.keytab**.
- **<service_principal_name>**: This must be the **<service_account>** followed by a slash / character, followed by the **<host_address>** of your Universal Type Server. For example, **MyTypeServer/196.0.10.123**

The command output should indicate that the keytab file was successfully created in the location specified.

Example:

In this example, the service account is **MyTypeServer** and its password is **agent86smart**.

```
ktpass -out C:\temp\universaltype.keytab -princ MyTypeServer/196.0.10.123@EXAMPLE.COM -mapUser MyTypeServer -pass agent86smart -ptype KRB5_NT_PRINCIPAL -cryptoALL
```

3. Move the **universaltype.keytab** file to your Universal Type Server, in one of the following locations:
 - For Windows servers, move the keytab file to **C:\Program Files\Extensis\Universal Type Server\data\sso\universaltype.keytab**
 - For macOS servers, move the keytab file to **/Applications/Extensis/Universal Type Server/data/sso/universaltype.keytab**

Information for the Type Server connection

When you connect your Universal Type Server to your Active Directory service (see **Connecting to the Active Directory service** on page 45), you will need to provide some of the information used in the previous sections.

- If you are using Single sign-on with Password, you will need the **<service_principal_name>** and the **<service_account_password>**.
- If you are using Single sign-on with Keytab, you will just need the **<service_principal_name>**.

Active Directory and failover servers

If your Universal Type Server installation includes a failover configuration, there are some specific issues to consider when using an Active Directory service.

- You will need to create two service accounts, one for each Type Server. The names of these accounts cannot be the same.
This means that the Service Principal Name for each server will have different service types as well as different host addresses.

Examples: **uts_primary/198.0.2.10@LDAP.EXAMPLE.COM** and **uts_secondary/198.0.2.11@LDAP.EXAMPLE.COM**.

- Since the service account password is stored in the shared Type Server database, the service accounts for the Primary and Secondary servers, while having unique account names, must use the same password if your connection does not use a keytab file.

Configuring the client software

You can add a configuration file to systems with Universal Type Client or Core Client installed. This file contains the network address of your Universal Type Server. By installing this file, users do not need to enter the server connection information when they start Universal Type Client or Core Client. If you also have Kerberos Single sign-on configured, users will not be presented with a login dialog; they will be automatically connected using the credentials they used to log on to their workstation.

It is also important to know the differences between Directory Service (LDAP) and native Universal Type Server accounts, and when a user might need to use one instead of the other.

The client configuration file

To allow Universal Type Client and Core Client users to connect quickly with Universal Type Server, administrators can create and deploy a configuration file that contains Type Server connection information. When this file is placed on each Type Client or Core Client computer, the login dialog is pre-filled with the correct server address and port. When used in conjunction with Kerberos authentication, this can provide a seamless login (Single sign-on) to Universal Type Server.

Parameters

The configuration file follows the basic format of **parameter=value**. The following parameters can be set:

PARAMETER	DESCRIPTION
server.address	The Universal Type Server address. If you specify server.address , you must also specify server.port .
server.port	The port number of Universal Type Server. You must specify server.port if you specify server.address .
server.bonjour	The Bonjour name of the server, if one exists. If you specify server.bonjour , it takes precedence over server.address and server.port declarations.

For example, if your Universal Type Server is at the IP address 10.1.2.34 using the default port, your configuration file would contain the following parameters:

```
server.address=10.1.2.34  
server.port=8080
```

If you choose a Bonjour name for your server instead, the file only needs to contain a single parameter. For example, if you gave your Type Server the Bonjour name "FontServer" the configuration file would contain the following parameter:

```
server.bonjour=FontServer
```

IMPORTANT: The configuration file must end with an empty line; press *ENTER* or *RETURN* after your final configuration parameter.

File format

The configuration file must be saved in UTF-8 format.

For Universal Type Client:

The configuration file must be named **com.extensis.UniversalTypeClient.conf**.

Place it in the following location on the computers where you have installed Universal Type Client:

- **64-bit Windows:** C:\Program Files (x86)\Extensis\Universal Type Client\
- **32-bit Windows:** C:\Program Files\Extensis\Universal Type Client\
- **Macintosh:** /Library/Preferences/

For Core Client:

The configuration file must be named **com.extensis.TypeServerCoreClient.conf**.

Place it in the following location on the computers where you have installed the Core Client:

- **64-bit Windows:** C:\Program Files (x86)\Extensis\Type Server Core Client\
- **32-bit Windows:** C:\Program Files\Extensis\Type Server Core Client\
- **Macintosh:** /Library/Preferences/

Saving a file in UTF-8 format

The UTF-8 file format is a common standard; however, you may experience difficulty with your config file depending on the program you use to create it.

Windows

You can use either Notepad or WordPad to create your config file.

In Notepad, save the file using the ANSI encoding (do not use UTF-8 from Notepad; this adds a byte border marker, or BOM, which is not recognized by Universal Type Client.)

In WordPad, save the file as an MS-DOS format text document. (WordPad's Unicode is UTF-16 Little Endian format, which is not recognized by Universal Type Client.)

To create your configuration file using an alternative editor to either Notepad or WordPad, we suggest using the excellent and free text editor, Notepad++, available for download from <http://notepad-plus-plus.org/>. Before saving, be sure to select **Encoding > UTF-8**.

Macintosh

You can use TextEdit to save your config file in the proper format.

First, make sure the file is formatted as plain text. Choose **Format > Make Plain Text**. (If the menu reads **Make Rich Text**, then the file is already in plain text format.)

In the **Save As** dialog, choose **Plain Text Encoding > Unicode (UTF-8)**. (If this option is not available, choose **Plain Text Encoding > Customize Encodings List**, check the box for **Unicode (UTF-8)** near the top of the Custom Encoding List, then choose the correct encoding from the pop-up menu.)

Make sure the file name ends with **.conf** and the option to use the **.txt** extension (at the bottom of the **Save As** dialog) is turned off. (You can also turn off the automatic **.txt** extension in the TextEdit **Preferences** dialog.)

Finally, click **Save**.

BEdit is a high-powered text editor for macOS from [BEdit](http://www.barebones.com/products/bbedit/) that includes a very capable "free" mode. If you use BEdit to edit your config file, set the encoding to **Unicode (UTF-8)** in the **Save As** dialog when you save your file.

Notepad++: <http://notepad-plus-plus.org>

BEdit: <https://www.barebones.com/products/bbedit/>

Fonts

The **Fonts** workspace shows all the fonts available on your Universal Type Server.

You can filter the list of fonts in several ways: by **Font Licenses**, **Connected Users**, **Workgroups**, or **Font Compliance Status**.

Choose a filter from the pop-up menu, then choose one or more of the items from the list on the left (a license, user, workgroup, or compliance status).

The list of fonts on the right will display those fonts that match the filter selection.

For example, to list all unlicensed fonts, choose **Font Compliance Status** from the **Filter By** pop-up menu, then click **Unlicensed** in the list below.

You can also search the list of fonts; the text you enter in the **Search** field will be matched against all displayed fields (**PostScript Name**, **Menu Name**, **Foundry**, **Type**, **Version**, and **Font Sense ID**).

Adding fonts

Adding fonts individually

Universal Type Server makes it easy to add fonts by searching through volumes, folders, and files to locate font files for you.

To add fonts to a workgroup:

1. Launch the Universal Type Client.
2. Select any item containing fonts—your hard drive, CDs, flash drives, network volumes, folders, or files—on the desktop.
3. Drag your selection into the **Fonts** pane to add them to the selected workgroup. You can also drag fonts onto a workgroup name or into a set within a workgroup.

NOTE: If the **File > Add Fonts** command is gray, you do not have the necessary user permission to add fonts to the selected workgroup.

Adding fonts as sets

To retain any current organization you have for fonts—for example, if you have folders of fonts for specific projects—you can add the fonts as sets. Each folder becomes a set with the same name and contents as the folder. The individual fonts are available to the entire workgroup and you can share the sets with the workgroup (if you have share sets permission).

To add fonts as sets, do one of the following:

- Choose **File > Add Fonts**, or press **COMMAND-L** (Mac) or **CTRL-L** (Windows). Use the **Add Fonts** dialog to locate and select a folder of fonts, then click **Add**. A set is automatically created from the folder you select.
- Select folders on the desktop that contain fonts. Drag the folders onto a workgroup in the **Workgroups** pane of Universal Type Client.

NOTE: Universal Type Client lets you create nested sets (sets within sets), but it does not automatically create them as you add folders of fonts. All the fonts within a folder will become a single set even if many folders of fonts are nested within the first folder. If you need to add nested folders as individual sets, select those folders and add them independently.

Font licenses

Universal Type Server allows you to associate fonts with information about their respective license agreements.

- The Font License is the instrument that allows Type Server to manage and report on font license compliance. Fonts that are not assigned to a license cannot be monitored for compliance.
- You create and edit license information in the User Management application.
- You can apply font licenses from either the Universal Type Client or User Management.
- Since you might purchase a font multiple times, a font can be assigned to multiple licenses.
- Since you might purchase multiple fonts at one time from the same supplier, multiple fonts can be assigned to a single license.
- Font licenses are added globally so the same license will apply to the font across all workgroups.
- Only Full Administrator users can create or edit licenses.

Developing a font license strategy

To create effective licenses, you will need to carry out the following tasks:

1. Locate all of your End User License Agreements for the fonts you own.
If you are unable to locate them, contact the foundries directly to receive a copy.
2. Verify which fonts each license applies to.
3. Consider an identifiable name for each license you will store in your Type Server.
4. Consider who will manage your licenses.
 - Will it be a shared task, or will one person be responsible?
 - Who will create licenses, who will apply them to fonts, and when will they do this?
 - How do you intend to handle unlicensed fonts and who will be responsible for monitoring this?

NOTE: You should always keep a hard copy or digital version of original End User License Agreements as proof of your license ownership.

For consistency and maximum efficiency, consider the following:

- Use standard naming conventions for licenses. If you have three different types of licenses from Adobe, you may need to be able to distinguish them from each other.
- Standard use of the **Comments** field, which lets you store additional information with licenses. For example, you might use this field to indicate which department licensed the font.

Creating, editing, and deleting licenses

To access licenses, choose **Window > Fonts and Licenses**.

To add a license:

1. Click **+** in the **Licenses** pane.
2. Enter the license information.

License name: Enter a descriptive and unambiguous name for the license.

Number of seats: How many computers each font in the license can be installed on.

Enforcement mode: **Strict** to have Universal Type Server automatically decline to allow more computers than the number of seats to activate the font, or **Notify only** to be notified if a font is activated more times than there are seats available.

Other information is generally optional, but consider using it as part of your licensing strategy and compliance plan. See **Other parts of a license** on the next page for details.

3. When you have finished entering the license information, click the **Save** button.

To edit a license:

1. Select a license in the **Licenses** pane.
2. Click the **Edit** button.
3. Modify the license information.
See **Other parts of a license** below for details about optional information you can add to your font licenses.
4. Click the **Save** button.

To delete a license:

1. Select a license in the **Licenses** pane.
2. Click -.
3. In the confirmation dialog, click the **OK** button to delete the license or click the **Cancel** button to keep it.

Other parts of a license

You can add more information to the license that you store in Universal Type Server to aid in your compliance goals, record keeping, and purchasing. The categories available are:

- **Terms of Use:** Add information about how the fonts covered by the license are allowed to be used.
- **Purchase Information:** Add information about when and how you purchased the fonts associated with the license.
- **License Details:** This displays when the Type Server License entry was created and who created it, and when it was last modified and who modified it.
- **License Agreement Documents:** You can upload files related to your license, such as a scan of an invoice or an email that includes license information.

To view any of these information categories, click on the category header. Click on the header again to hide the information.

Terms of Use

The **Terms of Use** section indicates how the fonts covered by a license can be used.

This might include whether fonts can be embedded in documents, or whether fonts can be supplied to a third party service provider to create your final output.


You can assign up to 10 terms to each font license.

Although Universal Type Server initially includes some sample terms, you can add your own, and you can edit or delete the original contents.

- To add a term to the list for the current license, choose one from the pop-up menu below the list and click + .
- To remove a term from the license, select it in the list and click - .
- To add terms to the pop-up menu, choose **Edit Terms of Use list** from the menu, then click + in the resulting dialog, type your new term, press the **ENTER** key, then click the **Save** button.
- You can also add comments below the list of terms.

Purchase information

You can add information related to your purchase records for your font license.

To enter dates, click the date field or the calendar icon , then choose the month, year, and day of the month from the calendar graphic.

License agreement documents

Universal Type Server can store digital copies of important documents related to your font license.

- To add a document to the list of **License Agreement Documents**, click the **+** button, enter a name for the document, browse for a file to upload or enter an URL to the document, then click the **Save** button.
- To remove a document from the list, select it in the list and click the **-** button.
- To view an URL or download a copy of an attached document, select it in the list and click the **View/Download** button.

Applying and removing licenses

To apply licenses to fonts, choose **Window > Fonts and Licenses**.

To apply a license to a font:

1. Select one or more fonts in the list.
2. Check the box next to the license you want to apply to the selected fonts.

NOTE: A checkbox that looks like this indicates that some of the selected fonts have the license applied, and some do not.

To remove a license from a font:

1. Select one or more fonts in the list.
2. Clear the checkbox next to the license you want to remove.

Finding unlicensed fonts

There are several ways you can identify fonts that do not have licenses assigned.

- In the **Fonts and Licenses** window, choose **Filter By > Compliance Status** and click **Not Licensed**.
- In the **Fonts and Licenses** window, choose **Filter By > All Fonts**, then select individual fonts to inspect the licenses assigned to them.
- In the **Reports** window:
 - a. Click **+** to create a new report.
 - b. Choose **Report Type > Font Usage**
 - c. Choose **Filter By > All Fonts**
 - d. Click the **Generate Report** button.
 - e. Select the generated report in the list at the left.
 - f. In the **Report Data** pane, click the **License** column to sort the data by font license. Unlicensed fonts are shown with a license “0” (zero).
 - g. Use one of the **Export** buttons to export the data.
- In the Universal Type Client, you can create a Smart Set to show unlicensed fonts in any workgroup. See the *Type Client User Guide* or help system for details.

Reports

The User Management application offers access to a variety of reports that provide details about your system, fonts, users, and font usage.

Using reports

- You can filter a data list to only display entries that contain certain text. Type some text in the field at the bottom right of the window and press *RETURN* or *ENTER*; the data list will be updated to show only those entries where the text you typed appears in any column (except the **Account Type** column, for reports that display this).
- Click a column head in a data list to sort the list on that column; click again to reverse the sort order.
- To resize a column, drag the right side of the column's head.
- Click one of the **Export** buttons at the bottom right of the screen to export the report data to use in other applications.

NOTE: If all of the individual reports are blank, there is probably a port conflict on your Universal Type Server. Alert your server administrator.

REPORT	PURPOSE	SEARCHING AND SORTING	DATA DETAILS
Fonts by Name	The list shows all fonts available to your Type Server so that you can see all fonts quickly.	Search and sort by PostScript Name, Foundry, Version, and Font Type. The interactive pie chart offers one-click filtering to view fonts by Font Type.	This report displays all fonts served by your Type Server as of the time that you generate the report.
Fonts by License	The list shows fonts assigned to licenses so that you can track how fonts are being licensed in your organization.	Search and sort on Postscript Name, Foundry, Version, and Font Type. The interactive bar chart offers one-click filtering to see the fonts assigned to a particular license.	This report shows all fonts and licenses in your Type Server as of the time that you generate the report. NOTE: A font may be assigned to multiple licenses.
Fonts by Workgroup	The list shows fonts assigned to each workgroup so you can easily see how many fonts there are in each workgroup, and which ones they are.	Search and sort by PostScript Name, Foundry, Version, and Font Type. The interactive bar chart offers one-click filtering to view in each workgroup.	This report displays all fonts and workgroups in your Type Server as of the time that you generate the report.
Duplicates	The list shows fonts that have multiple copies or versions stored on the Type Server so that you can remove unwanted versions.	Search and sort by PostScript Name and Number of Occurrences. Click the ⊕ icon at the left of an entry to display more information about the duplicate fonts.	See Additional report information on page 60.
Users by Name	The list shows all users and their account details so that you can ensure that all font users are able to connect to Universal Type Server.	Search and sort on name, date added and account type.	This report displays all user accounts in your Type Server as of the time that you generate the report.
Users by Workgroup	The list shows user accounts for each workgroup so you can easily see how many users there are in each workgroup and who they are.	Search and sort on account name, full name, and account type. The interactive bar chart offers one-click filtering to view users in each workgroup.	This report displays all users and workgroups in your Type Server as of the time that you generate the report.
Settings	The list shows user accounts and their settings so that you can monitor user settings across your entire font environment.	Search and sort on account name, full name, Client Replication Mode, Synchronization Interval, System Font Policy status, and Personal Workgroup setting.	This report displays settings for all users in your Type Server as of the time that you generate the report. See Settings on page 36 for details about the available settings and possible values.
Out of Compliance	The list shows which fonts have been out of compliance by how many “seats” over the available license count within the past 90 days so that you can maintain the necessary number of licenses at all times.	Search and sort on Postscript Name, Version, Font Type, Font ID, License Count, and License Usage.	This report shows data accumulated over the previous 90 days. See Additional report information on page 60 for more information about compliance

REPORT	PURPOSE	SEARCHING AND SORTING	DATA DETAILS
Font Usage by User	The list shows fonts used by the selected user in all of their workgroups.	Search and sort on Font Name, Postscript Name, Family, Foundry, Version, and Font Sense ID.	This report provides a current font usage snapshot as of the time that you generate the report.
Font Usage by Workgroup	The list shows fonts in all workgroups or a selected workgroup, with out-of-compliance fonts emphasized to provide an at-a-glance usage report that will help you keep your fonts in compliance and ensure that your users do not overuse their allocated licenses.	Search and sort on Font Name, Postscript Name, Family, Foundry, Version, and License. The interactive bar chart offers one-click filtering to see the fonts assigned to a shared set in the selected workgroup.	This report provides a current font usage snapshot as of the time that you generate the report.
Client Connections	The list shows current connections for the selected account type so you can monitor user activity and client currency.	Search and sort on account name, full name, IP address, Machine ID, Login Date, and Active status. The interactive pie chart offers one-click filtering to view client connections by account type.	This report displays all clients connected to the Type Server as of the time that you generate the report.

Additional report information

Out of Compliance report

Compliance is determined by font usage based on the licenses that you create and assign in the User Management application.

When a font is considered “in use” depends on the type of client replication being used:

- On Demand: Connected clients tell the Type Server when a font is activated or deactivated.
- On Demand with Cache: Connected clients tell the Type Server when a font is activated or deactivated. Fonts are cached, so activation may occur faster than on a non-cached client (which may have to download the font again).
- All: The client tells the server that all fonts are in use, assuming them to be active or able to be activated if the system goes offline.
- Go Offline: Similar to the All mode; if the user does not wait for fonts to synch after invoking the “Go Offline” command, only those fonts that have been downloaded will be considered “in use.”

Each font license includes a list of licensed fonts and the number of “seats” that can actively use the font simultaneously.

A font is in compliance if the number of seats where the font is “in use” does not exceed the total number of seats licensed for that font.

A font goes out of compliance if it is in use at more seats than the total number of licensed seats.

The Out of Compliance report shows fonts that have been out of compliance at some point in the past 90 days. It’s important to understand that fonts listed in this report may not be out of compliance at the time that you generate the report.

Use the compliance report to determine if you need to acquire more licenses for a font that is routinely out of compliance.

NOTE: A font can only go out of compliance if one or more of the licenses that include it has its **Enforcement mode** set to **Notify only**. **Strict** enforced licenses will not go out of compliance, but you may have content creators unable to work because they are denied access to fonts that are in use by the maximum number of allowed seats.

See **Font licenses** on page 54 for details about creating and assigning fonts to licenses.

Duplicate Fonts report

Duplicate fonts will typically have the same PostScript name and Display name, but different versions and/or foundries, and different Font Sense IDs.

Depending on your workflow, it may be important to keep these different versions available; subtle differences in glyph shape, kerning, and other elements may be important to maintaining the look of a specific client’s documents.

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 Support

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

[Extensis 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's 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.

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

[Learn and Support](#)

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

Extensis Knowledge Base: <https://help.extensis.com/hc/en-us/>

Support Services: <https://www.extensis.com/support/support-policy/>

Extensis's 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/>

Chat: <https://www.extensis.com>

Learn and Support: <https://www.extensis.com/learn-and-support/>

Legal resources

[Extensis EULA](#) (on page 65)

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 Policy](#)

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](#)

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Privacy Shield Policy: <https://www.extensis.com/privacy-shield-policy/>

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

Extensis EULA

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15. Entire Agreement. This Agreement constitutes the entire agreement between the parties and supersedes all prior or contemporaneous written, electronic or oral communications, representations, agreements or understandings between the parties with respect to the subject matter hereto.

June 2020

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