

BEST PRACTICES GUIDE

Server Based Font Management
Third Edition



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Disclaimer: Fonts are software and are subject to license restrictions. // Any recommendations in this guide regarding moving and using fonts should be considered with respect to the license included with the fonts. // May 20, 2020 4:24 PM Copyright © 2020 by Celartem, Inc. dba Extensis. All rights reserved.

The Decision To Use Server-Based Font Management

Font management provides consistency among the fonts installed on individual computers, and ensures compliance with font licensing terms. While you can perform these tasks manually, managing even a very small number of workstations and a very small collection of fonts can quickly grow to a full-time job.

It makes perfect sense to delegate a large portion of font management responsibilities to a server that can monitor all font activity on all computers in an organization. Not only can a server-based font manager ensure users have a consistent set of fonts and that all fonts in use are appropriately licensed, it can keep users from introducing rogue fonts to your organization and help reduce unnecessary spending on font licenses.

A server-based solution provides “the 5 C’s” of font management for an organization:

- + **Centralization:** All fonts are accessed from one secure location
- + **Consistency:** Users can be sure they are using the correct fonts.
- + **Compliance:** Your organization will be sure to only use fonts it has licenses for.
- + **Collaboration:** Teams are guaranteed to use the same fonts across projects.
- + **Creativity:** Users gain access to a wider variety of fonts when all fonts are shared.

Developing A Plan

Before you implement a server-based font management system, assess your existing needs and plan your font management, acquisition, and license reporting processes. Doing a little planning in advance will pay off significantly when you implement your solution.

Management of your font server solution can be a very simple process that requires little attention if you set it up with your specific requirements in mind. Many font servers run flawlessly for years with only minimal attention. By following these simple recommendations, your use of a font server will be efficient and rewarding.

General overview

Here are the basic steps you should follow to make implementing your server-based font management solution as quick and simple as possible.

1. Assess your users
2. Determine hardware, software, or cloud-hosting needs

3. Gather your fonts
4. Determine your current license levels; locate and attach any font purchase documents and EULAs
5. Define Workgroups and assign user responsibilities
6. Specify a font acquisition process
7. Roll out the solution
8. Implement a periodic license inspection

These steps fall into four groups: assessing needs, locating font resources, building a workflow, and implementing the solution.

Terminology

Some terms used in this paper may be unfamiliar, or may have a different meaning when applied to font management. Here are some of the terms we use and what they mean.

- + **font:** we use the term font to refer to the smallest collection of digital files that a computer can use to display a specific typeface on screen or in print
- + **system font:** a font that is located in the computer’s system font folder
- + **required system font:** a font that your computer’s OS needs in order to operate properly
- + **licensed font:** a font that you have purchased or acquired with another software purchase, and have the right to use on your computer
- + **font license:** the legal right to use a specific font
- + **license agreement (or End User License Agreement [EULA]):** a document conferring the right to use a certain number of copies of a piece of software (including fonts) in certain ways
- + **font server:** a served application dedicated to managing font distribution in accordance with available licenses
- + **activation:** the process of making a font available on a user’s system
- + **replication:** the process used by the font server to add and remove fonts from a user’s system
- + **compliance:** the act of ensuring that there are sufficient font licenses available to account for the fonts in use on user systems
- + **Workgroup:** a group of users that work on the same projects and require access to the same fonts

Assessing Your Needs

Before implementing a font server, you will need to identify how you will use it. This includes how many users you have and their physical locations, the computer platforms they use, and what new computing and software resources you will need to add to support your solution.

In addition to your current needs, your proposed solution should take into account expected growth or changes in your organization. Will more users become mobile? Will you add another office? Are you planning hardware or software purchases or upgrades in the future? Keeping the future in mind will help you configure a solution that can readily accommodate these types of changes.

Assess your users

Locate all users who rely on your collection of licensed fonts to complete their job. This can include users that need full-time access to fonts as well as users that need to use some fonts occasionally.

While you are doing this, the users will fall naturally into groups, if they aren't already organized formally as such. These groups can serve as a basis for creating font Workgroups. While it is not necessarily a primary consideration, user location may play a factor in your solution decisions. If you have two offices separated by long distances, you may decide that one location will manage fonts for all users, or that each location needs to implement their own solution. This decision may depend on how your organization's existing network is configured.

You may wish to use a simple worksheet to compile user information; an example is provided in the [Resources](#) section at the end of this document.

Determine hardware, software, and cloud-hosting needs

Before you select a font server, it's important to understand what your strategy is for hardware management.

- + Do you prefer to manage a server-font solution on site, or do you prefer solutions in the cloud? Are you virtualizing your servers, or do you prefer a hosted cloud solution that is managed for you?
- + What computer platforms do your users use? Will the solutions under consideration support them all equally, or is it possible that some users will need to be upgraded or change platforms?
- + What applications do your users use? Pay special attention to software that users will typically use with multiple fonts. Some solutions include custom support for specific design applications.
- + Will you need new or upgraded server hardware? Whether you are planning to install your font management solution on an existing server, using a virtual server solution, or plan to purchase a new system, make sure that you have adequate system resources to support your proposed solution. In the case of a virtual server solution, check with solution vendors to see whether virtualization is supported, and whether your particular virtualization system has been tested with their software.

Locating Font Resources

Font resources include licensed font files and supporting purchase and license information. Fonts can come from many sources: with your operating system, with creative tools such as the Adobe Creative Suite, or with other applications such as Microsoft Office. Fonts that are included with a software product are covered by the End User License Agreement (EULA) for that product and usually can only be used on systems where the product is installed. Fonts that you purchase separately include their own license.

Build your master font library

Locate the original copies of fonts you own. These can include product discs as well as downloaded files. If you cannot locate original files, you may choose to collect fonts from users' computers as well. The Font Management in macOS Best Practices Guide lists a number of fonts that are required for recent versions of the macOS to function properly.

Copy all the fonts for each platform to a single location. This makes it easier to check, clean, and back up your fonts. If you have older Macintosh font suitcases or Postscript fonts, be aware that copying them to a Windows computer or server volume will corrupt the files, making them unusable. You should compress ("zip") these types of files before copying them.

NOTE: if you are adding OS-specific fonts to any font server, you will need to add them using the operating system that they are designed to work on. Back up your original font files and store at least one copy in a safe, recoverable location.

To find out more about both Mac and Windows font file formats, see [Font Management in macOS Best Practices Guide](#).

Determine your current license levels

Current versions of popular operating systems offer support for multiple font formats. It is very possible that you still have fonts in use that you purchased many years ago. This is why developing a list of fonts and their associated licenses is probably the most challenging part of setting up a font server. Assessing which fonts in your collection that you can prove you have licenses for can easily be an ongoing process.

While gathering your fonts, you should keep records on what package (if any) the font was distributed with, which users have it installed, and how many copies of the package you own. In order to prove license compliance, you should find the license agreement for each copy of each font or bundle that you own. If possible, you should also locate the invoice or receipt for each font or bundle. Make a copy of all such material and keep it in order to complete your evaluation.

NOTE: Purchases you make online may not include printed invoices or licenses, but will provide digital copies or links to the appropriate material. Be sure to include those with your other license material.

Once you have gathered all available license information, correlate that with the fonts that you own. For each individual font, record the number of licenses as outlined in the respective license agreement.

LICENSE TERMS: Font licenses can include or exclude various "rights" for using the fonts. Some licenses allow the font to be embedded in documents (such as PDFs) so the documents look the same on other systems. Some allow the font to be used on the web. You may want to record this type of information along with the number of people allowed to use the font.

What If I Can't Locate License Agreements?

It may be worth contacting the type foundry in question to determine which licenses you own. They often keep records of licensing.

NOTE: Be prepared to replace licenses if the foundry doesn't have any records of your licensing. At this point some examples may help to clarify the relationship between fonts, license agreements and licenses.

Purchased Fonts

While collecting your fonts, you'll find that you have:

- + 4 copies of the FontFlipper Premium Collection, featuring the font SpoonFed. The collection's EULA states that you can install the fonts on up to 5 systems. This means you can install the collection on up to 4×5 or 20 systems.
- + 3 individual copies of the FontFlipper font SpoonFed. The individual font EULA says you can install the font on 2 systems. This means you can install the individual SpoonFed font on up to 3×2 or 6 systems.

For the SpoonFed font, you have 4 collection licenses for up to 5 systems each, and 3 individual licenses for up to 2 systems each, or $(4 \times 5) + (3 \times 2) = 26$ licenses. This means you can install the font SpoonFed on up to 26 systems.

Fonts Included With Software

Each of the eight members of your advertising department has a copy of AdDesignerPro, which came bundled with 800 high-quality fonts. Instead of installing this many fonts with the software on these eight systems, you can let your font server manage the eight licenses:

1. Create a font Workgroup or library in your font server that will hold all of your fonts.
2. Add the 800 fonts to that Workgroup or library.
3. Share the Workgroup or library with the eight intended users.

In the future, if the advertising department adds another user, you just need to buy another copy of AdDesignerPro (including another license for the font collection), install the software on the new user's system, and then give that new user access to this container of fonts.

Building A Workflow

Define font groups and user responsibilities

When using a font server, many teams find it most efficient and cost effective to break users and fonts into multiple containers. By distributing fonts to only the users who need them, you are able to reduce the number of fonts that you license to cover just the users who need them.

The names for these containers of fonts vary by solution – Workgroup, library, etc. – and the main takeaway is that these containers contain a curated selection of fonts that are distributed to users by need. For example, if you work in publishing, the fonts available to your Editorial users (the writers) would likely be very different than the fonts available to your Design team.

This isn't to say that there couldn't or shouldn't be overlap between your groups. Some fonts are so ubiquitous that they may be included in most Workgroups. Some people's jobs will put them on projects that involve multiple Workgroups.

Fonts are typically licensed for use on a computer, not by a person. The software solution you choose for font management should handle this transparently and should not need to involve you in identifying which users have access to which fonts on which systems. One method for defining your font groups is to start with users that have similar font needs. You might also create groups with membership determined by such features as:

- + Network user groups
- + Departments within your organization
- + Individual projects
- + Users assigned to specific clients

When defining your font groups, a good rule is that each document you design should use fonts from only one group. To put it another way, each font group should include all the fonts necessary for its members to complete their projects.

For information on how permissions, roles, and Workgroups are used in Universal Type Server, see [Appendix B](#).

Some teams may have the need to add new fonts to your collection. For clarity and consistency, it is best to identify one or two people who will manage the process of adding fonts. This way you can limit your exposure to fonts that may not be licensed in the way that your team needs them.

Some users may need to always access a core set of fonts, and never need to add or remove fonts. This could include non-production personnel who only need access to your organization's "brand" fonts. For these types of needs, it can be helpful to configure a separate font group that is distributed to all users ensuring every user has appropriate access.

If you have teams that frequently add and remove members, choosing a solution that manages user groups through Active Directory can help you add and remove user access automatically. As users are brought into the company and added to directory services, they are added to your company's main access network.

For information on how directory services can be used in Universal Type Server, see the directory services section of [Appendix B](#).

If your network does not manage group membership, or network groups are not easily related to font groups, then you should identify a group member who will be responsible for adding and removing users. In Suitcase TeamSync, you can give users permission to login and manage user accounts. In Universal Type Server, you can give a user Workgroup Administrator permissions.

Finally, each user may need certain rights and responsibilities related to managing fonts. Suitcase TeamSync contains simple permission management, while Universal Type Server is much more robust with a wide variety of permissions.

Choose appropriate options for your team, including:

- + The ability to add and remove fonts on the server
- + The ability to gather fonts used in a project for delivery to a print shop
- + The ability to create subsets of fonts and share subsets with other Workgroup members
- + The ability to apply search attributes (such as keywords and classifications) to fonts

You may wish to specify default permissions for members of individual groups, and override these as needed for specific members.

Specify a Font Acquisition Process

Every organization has a slightly different approach to purchasing font licenses. Some have a central purchasing agent that issues purchase orders, while others follow a totally different process.

No matter what your internal process may be, in terms of managing fonts and licenses it is a good idea to formalize the process of purchasing and adding fonts to your server.

Consider how many font licenses you will purchase for specific projects and teams. Extensis recommends that you always purchase enough licenses for all users who will have the font installed on their system. This is in compliance with what most font licenses state.

That being said, many organizations choose to adopt a more flexible font licensing strategy. Some groups will estimate how many people will be working on a project, and then purchase that many licenses. In this scenario, you should implement a periodic review of current licensing and use to determine whether you need to purchase more licenses. For example, Universal Type Server can be used to examine actual usage through Reporting so that you can adjust font purchasing accordingly. In strict license environments, you can implement a licensing enforcement policy where only a specific number of users can have a font in use, and all excess users are automatically rejected when requesting the font.

An analysis of use can help adjust your team's font licensing strategy so that you can increase or decrease the number of fonts you license. Some of your font server's settings can affect license tracking and reporting. For a discussion of font replication in Universal Type Server and its impact on licensing and reporting, see [Appendix A](#).

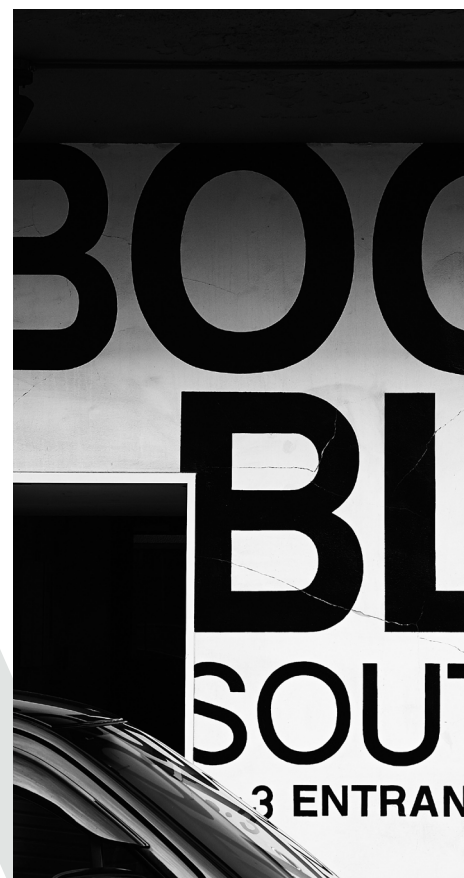
Example Font Purchasing Workflow: Trial Purchase

The Art Director purchases a selection of fonts to review for an upcoming project. They are installed only on her system, where she uses them to produce comps for client approval. Once specific fonts are decided on for the project, she notifies the IT department, who purchases the required number of fonts for the project and adds them to the font server for distribution to the team.

Example Font Purchasing Workflow: The Preview-Only Workgroup

This particular setup is easy to configure in Universal Type Server. With this setup, fonts that are not licensed for use by the entire team are added to a Workgroup where most users are only able to preview the fonts. Fonts in this Workgroup cannot be activated for use on end-user systems.

When fonts are appropriately licensed for use by the entire team, the administrator removes the fonts from the Preview Workgroup and adds them to a separate Workgroup where usage is allowed. The Preview-Only Workgroup in Universal Type Server is described in the Specialty Workgroup section of [Appendix B](#).



Implementing The Solution

There are multiple steps to implementing your solution.

Install required server software

When using a font server like Universal Type Server, install the server software on your hardware, or into your virtual environment.

Cloud-based solutions such as Suitcase TeamSync do not require installation, but must be set up to best meet your needs.

Build your font containers

Whether your font containers are called Workgroups or Libraries, set up these high-level font containers to contain fonts. This is accomplished by directly managing your server. With Universal Type Server, you will do so in the Users and Workgroups Management page, (<http://yourserverIP:8080>). In Suitcase TeamSync, login to your account and create new font libraries here: <https://teamsync.extensis.com>.

Add fonts

Using the appropriate macOS and Windows clients, upload fonts to your Workgroups and libraries. Remember that OS-restricted fonts must be added from a client on that platform. For example, Mac-specific PostScript fonts must be added using a Mac client.

Add users

Add your users to your Workgroups and libraries. This gives your users access to your fonts.

Provide training

Training your users is a critical step in the rollout process. This allows your users to understand their ability to access and use fonts, what is considered acceptable font use in your team, and where to go for help. Font server software can greatly help your team, but if you skip training you'll only be getting part of the benefit.

Distribute client software

At this point you can distribute the client to your end-users (Universal Type Client or Suitcase Fusion, depending upon your choice of solution.)

Schedule periodic inspection

To ensure that your font licensing strategy is effective, be sure to implement periodic inspection of your team's font usage.

With Universal Type Server, this would include running periodic compliance reports to ensure that you are operating within your licenses, or to spur you to purchase more licenses.

With Suitcase TeamSync, you may want to manually inspect the number of users who have access to each library, and respond accordingly. If your team requires more detailed usage analysis, consider upgrading to Universal Type Server.

Appendix A:

How Font Replication Methods Affect Font License Reporting

When dealing with Suitcase TeamSync, all fonts to which a user has access are always synchronized to the end-user's machine. When a new font is added to a font library, it is automatically replicated to every user who has access to that library. So, font replication and caching settings are not a concern with Suitcase TeamSync.

With Universal Type Server, font replication and caching methods can be set up in a much more granular way, controlling both replication and how fonts are cached on the user's machine. This section describes how the configuration of those settings can affect your font compliance and usage reporting. Font replication refers to the method that a font server uses to copy and remove managed fonts on a client system. Font replication can range from only making them available as a user actually needs them—"on demand"—up to always making all fonts available at all times.

Font caching is part of font replication. The font server may allow fonts to remain installed on a user's system even after the user logs out. This may make it faster for the user to resume work when he returns to his system, at the expense of the licenses for those fonts remaining "in use."

How you choose to replicate and cache will impact how your reports show font licenses as being used. For example, if you have five licenses for a font, and five members in a Workgroup that includes that font, and you make that font always available to all members of that Workgroup, then your reports will show that all five licenses for that font are always in use, regardless of whether each member of the Workgroup actually uses that font. If you add another member to that Workgroup, the licensing report may lead you to believe that you need to buy another license for that font because all licenses are reported as in use.

To avoid unnecessary purchases, you should determine the actual needs of the group. If only certain members will need access to specific fonts, then an "on demand"

replication method may better suit their needs. If, however, most users will need most of the fonts most of the time, then giving full access and purchasing the requisite number of licenses may be the more sensible route.

There is a special case where on-demand replication may not be practical. This is for a user that works remotely and is not always connected to the font server. In this case, allowing them to install all the fonts they may need can save them significant time and trouble. This user (or more appropriately, the remote computer) will connect once to the font server, download and install all the fonts assigned to his or her Workgroup, then disconnect. The font server will record that each of the downloaded fonts has one license in use on the disconnected computer system.

Machine-based vs. user-based licensing

Fonts are licensed to be installed on a specific number of computer systems, or machines. Most server-based font managers respect this machine-based licensing, and track license usage accordingly. While we speak of Users as members of Workgroups, and fonts being assigned to Workgroups, a server-based font manager almost always identifies font license usage by counting the systems that a font is installed on, rather than by the individuals that are using the font.

Example: One user, two computers

Suppose a designer uses a particular font in Photoshop on a Macintosh and QuarkXPress on a Windows system. The font in question will be used on two separate computer systems by one user. With machine-based licensing this counts as using two licenses, while under user-based licensing this is counted as only using one license.

Since a font's End User License Agreement (EULA) almost universally describes licensing in terms of how many systems the font can be installed on, the user-based licensing model falls short in this regard: you will actually be using more licenses for the font than you have actually purchased.

NOTE: For licensing purposes, a virtual machine (VM) counts as a separate computer system. Using fonts on a virtualized Windows system as well as its host Macintosh system, for example, uses two font licenses, just as if the virtual system was a separate physical computer.

Example: One computer, two users

Suppose two designers share a single computer and use the same font. The font will be installed on one computer and used by two people. With machine-based licensing, this is counted as one license (the font is installed on one computer), while user-based licensing counts this as two licenses. If your users share systems and you were to purchase font licenses according to a user-based licensing model, you would be spending more money on font licenses than you actually need to.

Appendix B:

How Universal Type Server Does It

Universal Type Server includes multiple parts that work together seamlessly: Server Administration, Users and Workgroups Management, Desktop Client, and the optional Core Client and FontLink. The Server Administration application is where your organization's Server Administrator will license the Universal Type Server package, perform backups, and do other server-related maintenance tasks.

The Users and Workgroups Management application is where the Font Server's Administrators create Workgroups, add users, specify permissions, enter and apply font licenses, and generate reports. The Desktop Client (for macOS and Windows) performs all the actual font management tasks, including adding and removing fonts on the server, creating sets, and activating fonts on a user's computer.

The Core Client is an optional client that performs automatic activation of fonts and management of system font policies for users that do not need the capabilities of the Desktop Client. FontLink is an optional add-on module that provides connectivity to automated workflows that rely upon InDesign Server. This appendix gives a brief overview of some of the most important features in Universal Type Server.

Permissions

There are several activities that a user might be allowed to perform in Universal Type Server, including managing users, adding fonts to the server, and collecting fonts for distribution to a service bureau. In Universal Type Server, default permissions are specified by a user's role within a Workgroup, but can be overridden for a specific user within a specific Workgroup. Users can also be granted or denied permissions globally, overriding any role or Workgroup-specific settings.

Roles

A role is a set of available permissions and their settings. These settings determine what each user that is assigned a specific role will and won't be able to do with respect to font management. In Universal Type Server, there are several predefined roles that cover the most common usage scenarios, and you can create your own to fill very specific needs.

Workgroups

In Universal Type Server, a Workgroup is a collection of fonts intended for a specific job, division, publication, or other activity. Use the Users and Workgroup Management application to create and name a Workgroup, assign a default role, and add notes about the Workgroup. When new users are added to the Workgroup, they will be given the specified default role. You should choose or create this role based on what you expect will apply to the majority of users in the Workgroup. You can make custom changes for individual users that need different permissions.

Users

In Universal Type Server, each person that needs server-based font management is given a user account. This user account can then be added to one or more Workgroups, depending on the tasks the individual needs to accomplish. Users use their account name and password to use the Desktop Client or Core Client. User accounts can be created manually or can be mapped from a network directory service such as an Active Directory server.

Administrators

While one person can manage all aspects of Universal Type Server, it also allows you to delegate responsibilities among trusted users. The Server Administrator (or System Administrator) is the only user that can manage the Universal Type Server using the Server Administration application. The Server Administrator can also perform all Users and Workgroups Management tasks, or create other administrator accounts to delegate tasks. The Full Administrator can perform most Users and Workgroup Management tasks and is primarily responsible for high-level user and Workgroup organization. He or she can delegate some responsibilities by assigning Workgroup Administrator or Font Administrator tasks to other users.

The Workgroup Administrator can add and remove users in their Workgroups and perform all the tasks of a Font Administrator. The Font Administrator can use the Desktop Client software to add and remove fonts, create and remove shared sets, and change font attributes (such as add keywords).

Core Client

For users that always need to access only a limited number of fonts, Universal Type Server includes the Core Client. An administrator creates one or more “startup sets” of fonts, and installs the Core Client on the user’s computer. When the user starts his computer, he logs in to the Core Client with his Universal Type Server account name and password, and his fonts are automatically updated to match his assigned startup sets. Core Client login can be automated using a directory service and Kerberos single sign-on, so it is invisible to your users. The Core Client can also manage system font policies, so that users cannot install additional fonts on their own system, and cannot remove required system fonts. The Core Client helps you ensure that every system in your organization is part of your font management process.

Directory Service

If your organization uses Active Directory, Universal Type Server provides these additional enhancements:

- + You can easily import your user list into Universal Type Server.
- + Using Active Directory authentication, users can login with the same credentials they use for other network access (such as e-mail).
- + Using Kerberos single sign-on, users can login to their computer and immediately synchronize with the Universal Type Server.

Specialty Workgroups

Within the Users and Workgroups Management application, there is a special collection called All Users. As its name implies, this lists all the users that have been added to any other Workgroup. You can create users in a specific Workgroup (in which case they will be added to that Workgroup and the All Users Workgroup), or you can create them in the All Users list. You can copy users from the All Users Workgroup to other Workgroups. (Users need to be assigned to at least one Workgroup in order to access the font server.)

The All Fonts specialty Workgroup is only displayed to Administrators within the Desktop Client; it is not shown in the Users and Workgroups Management application. This lists all fonts that have been added to the Universal Type Server, and is a quick way for Administrators to find fonts and add them to other Workgroups. The My Fonts Workgroup is a Workgroup displayed to all non-administrator users that contains all fonts that the user has access to, without regard for the actual Workgroup that contains the font. A Preview-Only Workgroup is a Workgroup where most of the members are assigned the Preview-Only role. This role lets users see font samples but they cannot add, activate, or collect fonts. This Workgroup acts as a sort of “storefront” for users to see the fonts that an organization has available without actually activating them (and using up font licenses). If a user sees a font she wants to use in a project, she can ask her Workgroup Administrator to license it to their Workgroup.

Reports

Universal Type Server Enterprise provides font license compliance enforcement, usage, and reporting capabilities. You can generate reports on demand and get an instant snapshot of font usage, or a historical report of font activation.

A Font Usage report displays each font, the type of compliance enforcement assigned to the font, how many licensed copies of the font you own, how many copies of the font are in use, and whether the font’s usage is in compliance with its license count. You can monitor font usage to ensure font licenses are not being over- or under-utilized. You can filter usage reports by a number of criteria, including Workgroup, license, user, and compliance status. An Activity report shows all activities associated with a font, including changes in compliance. You can use this report to track compliance warnings and monitor individual user activity. You can filter Activity reports to include only certain types of activities.

Compliance reports that provide overuse information ensure that you cover font licensing for your entire group. Reporting data is retained for 90 days ensuring a complete picture of font usage. Reports can be displayed in a web browser or exported as raw data so you can perform additional manipulations using a spreadsheet program.

User

Step 01

Workgroup Name

Step 02

Default Permissions

- Add and remove users in the Workgroup
- Add and remove fonts on the server
- Activate fonts on local system
- Collect fonts for distribution to service bureau
- Create and delete shared sets
- Modify others' shared sets
- Create and delete sets activated at startup
- Create and delete font licenses
- Create and delete keywords
- Create and delete other font properties (styles, families, etc.)
- Apply licenses to fonts
- Apply keywords to fonts
- Apply other font properties to fonts

Step 03

Workgroup Membership

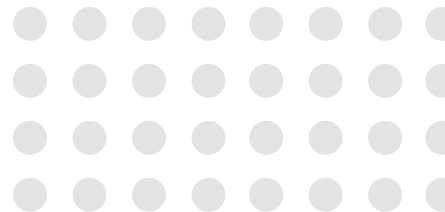
- + Member Name:
- + Role in Workgroup:

Step 04

Workgroup Fonts:

Step 05

Notes:



User

Step 01

User Information

Full name:

Email address:

Network user groups:

Department:

Step 02

Font Server Account Information

Account name:

Password:

Can change password:

- Yes
- No

Step 03

Account Settings

- Account Roles and Permissions
- These will be dependent on your software solution

Font Replication Mode (choose one)

- All fonts in user's Workgroups always available (Fonts are cached)
- All previously requested fonts are available (Fonts are cached)
- Only fonts specifically requested are available (Fonts are not cached)

Personal font set (choose one)

- Not allowed
- Allowed; stored locally
- Allowed; stored on server

Step 04

Global Permissions

- Add and remove fonts on the server
- Collect fonts for distribution to service bureau
- Create and delete font licenses
- Apply a license to a font
- Create and delete keywords
- Apply keywords to fonts
- Create and delete other font properties (styles, families, etc.)
- Apply other font properties to fonts

Step 05

Workgroup Membership

Workgroup Name:

Role in Workgroup:

Step 06

Notes:

Resources

Font Management Best Practices Guides

Extensis also provides specific documents that are designed for client-level font cleanup.

These documents detail the needs for each operating system independently, macOS or Windows. Download the documents directly from the [Extensis](#) website.

Software Downloads

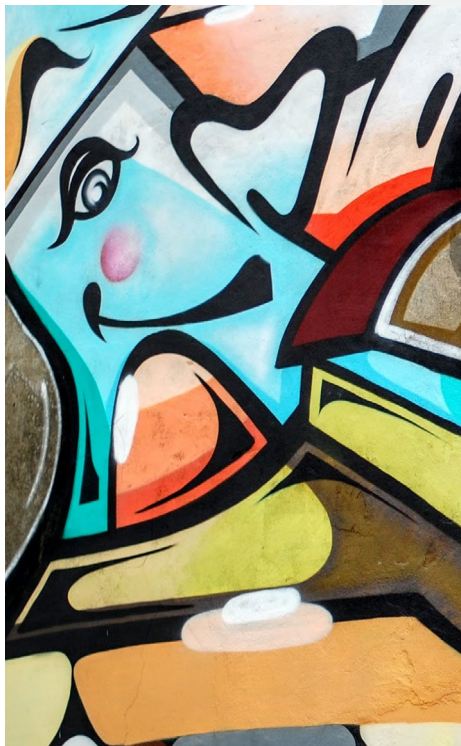
Learn more about Extensis font management software on our product pages:

[Universal Type Server](#)

[Suitcase TeamSync](#)

[Suitcase Fusion](#)

If you are unsure about which font manager best suits your needs, please take a moment to compare features side-by-side [here](#).



Contact an Extensis Representative

If you're feeling overwhelmed or you're not sure how to get started, we are here to help. Our sales team is knowledgeable and ready to help you solve your font problems. Contact our team [here](#).

CONTACT

Extensis

Toll Free: (800) 796-9798

Phone: (503) 274-2020

Fax: (503) 274-0530

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Extensis Europe

Phone: +44 (0) 1604 654 270

Fax: +44 (0) 1604 654 268