

# User Guide

# Universal Type Server®



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# Introducing Universal Type Server

In Universal Type Server®, all the fonts in the organization are consolidated into a single, secure location on a server. Fonts are managed as follows:

- The administrator subdivides the fonts into workgroups intended for specific types of users or projects
- The administrator decides which workgroups you need to access.
- You access workgroups, and the fonts within them, through the Universal Type Client™ application.
- Your user permissions control what you can do with fonts within each workgroup, including whether you can add fonts, share sets, change a font's class, and more.
- Some users are font administrators, giving them more power over fonts.

## What's new?

### What's new in Universal Type Client 2.1

- Export and import set definition files that contain information about your font sets, including the set names and Font Sense IDs of the fonts contained within the set.
- Support for TrueType Collection font types.
- Now supports Mac OS X 10.6 (Snow Leopard) and Windows 7 required fonts.
- Font corruption checking improvements.
- Improved Type Client synchronization with the server.

### What's new in Universal Type Client 2.0

The Universal Type Client contains a number of new features in the 2.0 release. Here's a quick overview of the new features.

**[Floating previews](#)** – any font preview in the preview pane can be torn-off from the Type Client. This preview now floats above all other windows in the operating system, and responds to any changes in preview type and type size.

**[Glyph View Window](#)** – This allows you to view and compare the glyphs from selected fonts.

**[Print sample pages](#)** – print exactly what you see in the preview pane. This can be handy to create a sample for client review.

**[Improved Attributes information pane](#)** – when a font is selected, the Attributes Information pane displays who added the font, when it was added, and which workgroups that contain the font. Full administrators are able to selectively delete fonts from any workgroup from the information pane.

**[Improved font corruption handling](#)** – the Type Client warns you when a potentially corrupt font is added, gives you the option to add potentially corrupt fonts to your local personal workgroup, as well as gives you the option to scan local fonts for corruption.

**[Startup sets](#)** – your administrator can designate sets of fonts that automatically activate when you log in. Fonts in startup sets are permanently active and cannot be overridden.

**[Improved system font handling](#)** – You are now able to override fonts that reside in operating system fonts folders.

**[Improved Find settings](#)** – find fonts by the date that fonts were added to Universal Type Server or by the username of the person who added the font.

**Improved conflict handling** – new permissions allow you to tell the Type Client how to handle font conflicts, and whether to warn you when conflicts happen.

**Encoding-aware previews** – When you select a font that does not contain the characters in your preview, whatever the preview mode, the Type Client displays the characters that exist in the font.

**Workgroup column** – a new column shows the workgroups that contain the selected font.

## The Universal Type Server Daily Workflow

If you've been using another font manager, your workflow stays relatively the same — open the font manager, find the fonts you want to use, and activate them. The benefit of Universal Type Server® is that everyone you work with has access to the same fonts at the same time. Take a look at the typical use of Type Server®:

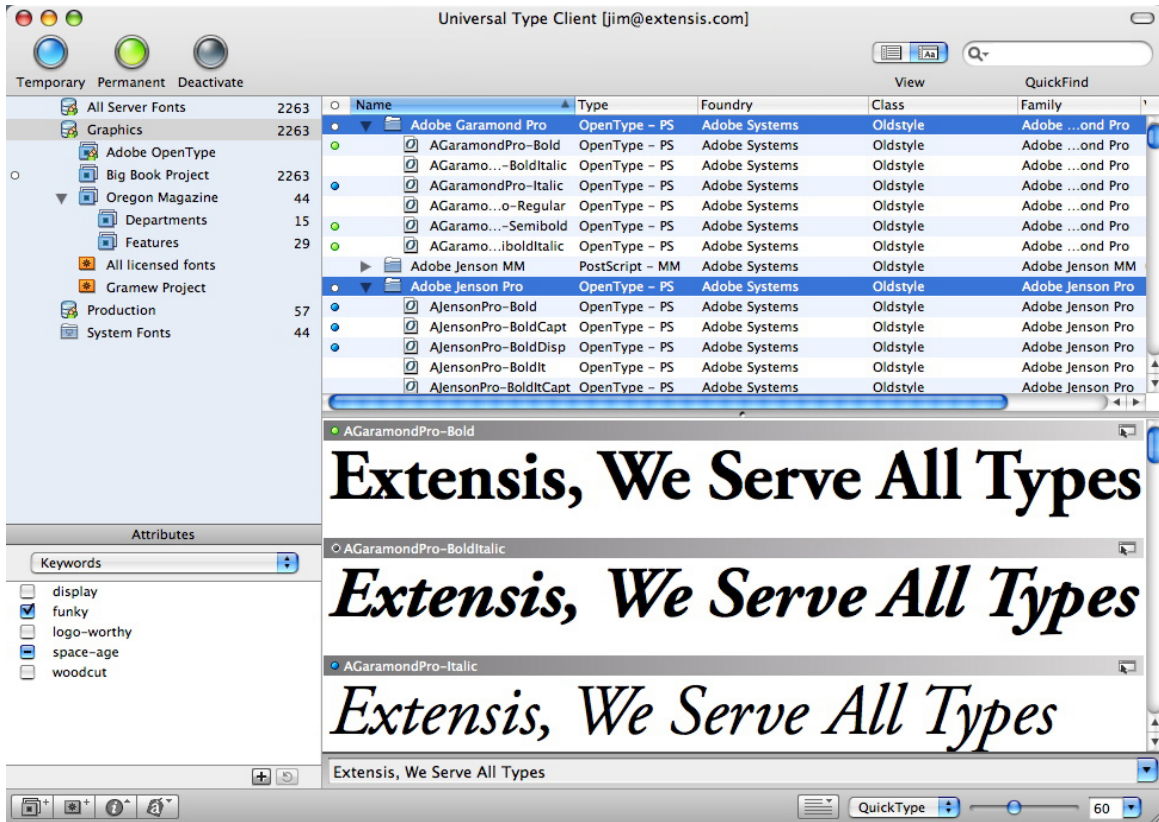
- Launch the Universal Type Client™
- Open the appropriate workgroup (in many cases, you will belong to only one workgroup)
- Use the Universal Type Client to sort and preview fonts
- Customize font keywords, classes, foundries, and more\*
- Create sets of fonts for specific projects or clients
- Add new fonts you purchased or received with jobs\*
- Activate any fonts you want to use
- Use the fonts in any application in any document
- Collect fonts for output\*

Universal Type Server can also [activate fonts automatically](#) when you open documents in supported applications.

\*You need permission to perform these activities.

## Understanding the Client Window

The Universal Type Client™ offers all the power you need to manage fonts.



Roughly divided into four quadrants, the window is organized as follows:

- The **Workgroups** pane is in the upper left
- The **Fonts** pane is in the upper right
- The **Attributes** pane is in the lower left
- The **Preview** pane is in the lower right

You can customize the toolbar across the top and hide the **Attributes** and/or **Preview** panes. The Universal Type Client window does not need to remain open to keep fonts active; you can open and close it as necessary.

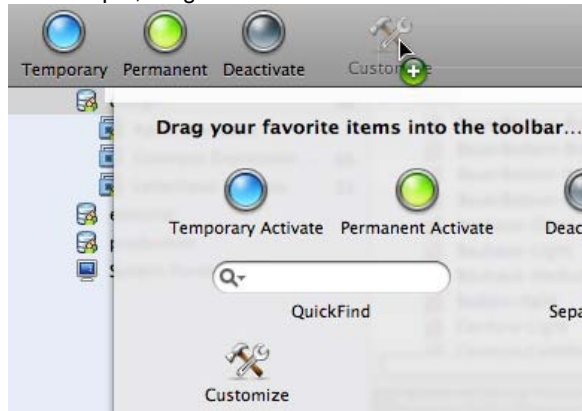
## Customizing the Toolbar

By default, the toolbar across the top of the Universal Type Client offers buttons for activating fonts, buttons for showing and hiding font previews, and the QuickFind tool. In the Mac OS X Type Client, you can customize the toolbar by adding and removing controls, adding spaces and separators, customizing the icon and text usage, and using smaller icons.

In the Windows version of the Universal Type Client you can turn off and on the display of the tool bar by choosing **View > Toolbar**.

To customize the toolbar in Mac OS X:

1. Choose **View > Customize Toolbar**.
2. Drag any items from the top of the dialog box into your toolbar. If you customize the toolbar often, for example, drag the **Customize** button to it.



**NOTE:** To revert the toolbar to its default state, you can drag the default set of tools from the bottom of the dialog box up to the toolbar.

3. To customize the icon and text usage, choose an option from the **Show** drop-down menu: **Icon & Text**, **Icon Only**, or **Text Only**.
4. To decrease the button and text size by 50%, enable the **Use Small Size** option.
5. When you're finished customizing the toolbar, click Done.

**NOTE:** To hide the toolbar entirely, choose **View > Hide Toolbar**.

## Disabling Other Font Managers

To ensure the proper operation of Universal Type Client, it is important to disable or uninstall any other font managers.

Just closing or quitting other font managers might not be sufficient. Many font managers, including the Universal Type Client, run an application in the background that manages font activation and deactivation. These background applications must be disabled before running the Type Client. To do so, check for an application preference that tells the other application to launch on startup or login and then restart your machine.

On Mac OS X 10.5, it is important to disable two Font Book preferences. The following preferences act like system preferences and can interfere with Universal Type Client:

- **Automatic font activation** - This option interferes with professional font managers and does not allow for automatic font activation across all applications. The Universal Type Client still allows you to use plug-in based automatic activation for each supported application.
- **Alert me if system fonts change** - When enabled, this option will automatically place "protected" fonts back into your system font folders even if you remove them. It also can prevent a professional font manager from effectively managing or overriding your system fonts.

**WARNING:** Do not launch Font Book while using Universal Type Client. Remove it from the Dock if necessary.

## Connecting to Universal Type Server

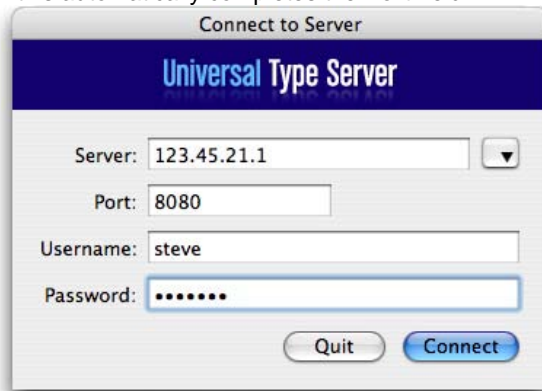
Your user name and password allow you to connect to Universal Type Server® from any computer with access to your network. Once you're connected through Universal Type Client™, you can open a workgroup and begin using fonts. When necessary, you can work offline as well. Your user settings and permissions control precisely what you can do with the fonts in each workgroup.

## Connecting the First Time

The first time you launch Universal Type Client™, the **Connect to Server** dialog box displays. To begin accessing fonts through Universal Type Server®, you need the server's IP address, the port number, your user name, and your password from the administrator. The server and port information is saved with Universal Type Client on your computer and you will not need to enter it again.

To connect to the server:

1. In the **Server** field, enter the IP address, DNS name or Bonjour name of the server. If you have connected to Type Server™ before, you can select a server address from the drop-down menu; this automatically completes the **Port** field.



2. In the **Port** field, enter the default port number, 8080, or the port number supplied by your administrator. If you entered a Bonjour name into the Server field, you do not need to enter a port number.
3. In the **Username** and **Password** fields, enter the information supplied by your administrator. **NOTE:** The **Password** field is case sensitive, but the **Username** is not. If your login fails, check the spelling and case of your password. If you continue to have problems, contact the administrator.
4. Click **Connect**. As long as you have access to the network, you will be connected to Universal Type Server.

If you need to disconnect entirely from Universal Type Server at any time, choose **Server > Forget Connection**. If you need to continue working with active fonts while disconnected, choose **Server > Go Offline**.

## Connecting Automatically

When you restart your computer, based on your Universal Type Core preference settings, the Universal Type Core automatically launches and connects to Type Server®. As a result, the fonts you permanently activate in the Universal Type Client are available after restart.

**NOTE:** The Universal Type Core is a process that runs in the background to keep the appropriate fonts active on your system. You do not need to have the Universal Type Client running to keep your fonts active.

When the Universal Type Core is running, you can open and close the Universal Type Client as often as necessary. You only need to re-enter your user name and password if you connect from another computer or if you reconnect after choosing **Server > Forget Connection**.

## Changing Your Password

You can change your password to something more meaningful or easier to remember — if the administrator gave you the permission to do so. For maximum security, change your password periodically and choose one that is not obvious to your coworkers (that is, do not use your children's or pet's names).

To change your password:

1. From the Universal Type Client, choose **Server > Change Password**. (If this command is unavailable, you do not have permission to change your password.)
2. Type your new password in the **New Password** field.
3. Enter the password again in the **Verify** field. **NOTE:** The **New Password** and **Verify** fields are case sensitive.
4. Click **Change Password** to save the change. Use the new password the next time you connect to Universal Type Server.

## Disconnecting from Universal Type Server

You will rarely need to manually disconnect from Type Server®. But if you do, first make sure you're finished using fonts and that you don't have any jobs in the print queue as disconnecting automatically deactivates all fonts. (You can continue to use system fonts and fonts activated through other font managers.)

**NOTE:** If you need to continue working with fonts while disconnected, choose **Server > Go Offline**. Depending on your user settings, you will have access to (1) active fonts and (2) fonts already downloaded to your system. Fonts that are not available while offline display in red.

To disconnect from Universal Type Server:

1. Choose **Server > Forget Connection**.
2. When the warning displays reminding you that all fonts activated through Universal Type Client will be deactivated, click **Forget Connection**.

To close the Universal Type Client without disconnecting, close the application window. You can also:

- Mac: Choose **Universal Type Client > Quit Universal Type Client** or press Command+Q.
- Win: Choose **File > Exit** or press Alt+F4.

Closing the Universal Type Client application window does not disconnect you from the server or deactivate fonts. The Universal Type Core runs as a background application that keeps fonts active and interfaces with the auto-activation plug-ins.

## Working Remotely

If you need to work with fonts while not connected to Universal Type Server — for example, if you're working off site without an Internet connection — you can work in “offline mode.” To work in offline mode, choose **Server > Go Offline**. When you are ready to connect to the server again, choose **Server > Go Online**.

**NOTE:** If Universal Type Server is down for maintenance or any other reason, your Universal Type Client will automatically work in offline mode.

While working offline, your font management activities will be limited as follows:

- **Font access:** While working offline, you have access to the fonts that were in your cache when you disconnected from the server. See [Understanding Cached Fonts](#) for more information. [link to next section]
- **Font management:** You cannot change any font information that affects the information on the server while offline. This means you cannot perform activities such as sharing sets, changing attributes like keywords, or deleting fonts.
- **Using a Personal Workgroup:** If you have a Personal Workgroup, you will be able to activate, and preview fonts in that workgroup — but you will not be able to change font attributes while offline.

**NOTE:** You must connect with the Universal Type Server at least once every 30 days to continue using the Universal Type Client.

## Understanding Cached Fonts

The fonts in your cache — the fonts available to you while working offline — vary according to the Font Replication Mode the administrator has assigned to you. The Font Replication Mode controls when fonts are downloaded to your system. If you need to work offline, ask the administrator what your Font Replication Mode is:

- **All:** Fonts from all the workgroups you belong to are automatically downloaded and available to you while working offline. When you connect to the server again, your fonts are automatically synchronized with the server. If you need to work offline often, this is the best setting for you.
- **On Demand:** Fonts are downloaded as required for activating, previewing, and collecting. When fonts are no longer required, they are removed from your system. Only fonts that are currently active or being previewed are available while working offline. In this case, activate all the fonts you may need before choosing **Server > Go Offline**
- **On Demand Local Cache:** As with On Demand, fonts are downloaded as required for activating, previewing, and collecting. The difference is that the fonts remain in your Universal Type Client cache and are available for use while working offline. As with On Demand, you may want to activate all the fonts you may need before choosing **Server > Go Offline**.

**NOTE:** If your Font Replication Mode is set to **All** or **On Demand Local Cache**, your fonts may not match the server fonts at all times. For example, if another user adds a new font or deletes a font, your Universal Type Client may not update for several minutes. If you need to ensure that your fonts are the same as those on the server, choose **Server > Synchronize** or use the keyboard shortcut Command-U (Mac) or Ctrl-U (Win).

## Understanding Your Permissions

When the administrator adds you to Universal Type Server, he or she decides which functions you can perform within the workgroups you are assigned to. Your permissions are likely to vary according to your position, experience, and expertise. If you do not have permission to perform a task, the Universal Type Client grays out the command or displays an alert. In addition, the administrator should provide you with a list of what your permissions are.

The permissions work as follows:

- Your permissions may vary from one workgroup to another.
- In some or all workgroups, you may be a “font administrator.”

**NOTE:** If your permissions do not allow you to do your job, contact the administrator.

## Font Administrators

If you are a font administrator in a workgroup, you can perform all the font-management tasks available in Universal Type Server. These include:

- Add and delete fonts
- Collect fonts for output
- Create, delete, and modify shared sets
- Create, delete, and apply keywords, styles, classifications, foundries, and font licenses
- Regroup and rename font families
- Activate fonts across workgroups
- Create startup sets of fonts that are permanently active for all workgroup users

## Handling System Fonts

Your system fonts display as a “workgroup” in the Universal Type Client at the top of the Workgroups pane. These fonts are activated by your operating system.

If an “Unknown” or “Other” set is listed in your System Fonts workgroup, these are typically fonts that have been activated by other font managers and applications outside of the operating system.

## Operating system font folders

Depending upon your configuration, you may not be able to add fonts to the physical system fonts folder on your system. Your server administrator controls the list of approved fonts that can be added.

If you place fonts into the system fonts folder in the Mac OS X Finder or Windows Explorer, any fonts that are not on the approved list are automatically removed. Check with your server administrator for details about your setup and list of approved fonts.

## System fonts on Mac OS X

When using Universal Type Server on Mac OS X, fonts that are required for the operating system to function properly are located in the System Fonts “System” folder with a “locked” icon. To ensure the stability of your system, these fonts cannot be manually deactivated.

Fonts that are considered required are built into the Universal Type Client and are updated with each new operating system release. It is best to keep Universal Type Client current to keep your required fonts list current.

If you attempt to activate a font that has the same PostScript name as an active system font, as long as the font is not a "required" system font, the Universal Type Client automatically deactivates the system font and activates the requested font based on your activation preferences. For information about setting this preference, see [Handling Activation Conflicts](#).

**NOTE:** If a font is activated by a startup set, you are not able to override or deactivate the font.

## System fonts on Microsoft Windows

Fonts required for Microsoft Windows to function are listed in the System workgroup folder with a "locked" icon. These fonts cannot be deactivated or overridden.

## Understanding Personal Workgroups

In addition to the workgroups you belong to, the administrator can give you a Personal Workgroup to store your own fonts in. If you have a Personal Workgroup, you can add, delete, and collect the fonts at your discretion, but other users will not be able to see or access fonts in your Personal Workgroup. Therefore, you should not use fonts from your Personal Workgroup in official projects.

As with other fonts, those in your Personal Workgroup are deactivated automatically when you disconnect from Universal Type Server. You can, however, work with fonts in your Personal Workgroup while working in [offline mode](#).

## Restoring user disabled warnings

From time to time while you are using the Universal Type Client, the application will warn you about the consequences of an action or command. If you don't want to be warned again about the consequences of that specific action again, you can click a check-box to disable future warnings for that specific warning only.

To restore all warnings that you have previously disabled:

1. On Mac OS X, choose **Universal Type Client > Preferences (Command-.)** or on Windows, Choose **Edit > Preferences**
2. Click the **Restore** button.
3. Click **OK**.

# Activating and Deactivating Fonts

When working with Universal Type Server, you manage fonts through the Universal Type Client. As your font manager, the Universal Type Client lets you quickly find the fonts you need, and then activate and deactivate individual fonts, families, and sets. You can work with fonts as follows:

- You can activate fonts permanently, so they're active the entire time you're connected to Universal Type Server.
- The administrator can specify a startup set of fonts in your workgroups that activate permanently when you connect.
- You can activate fonts temporarily, so they're available until you disconnect from the server or shut down your computer.
- Plug-ins provided with Universal Type Server automatically and precisely activate fonts when you open documents in popular graphic design applications.
- Once fonts are active, they're available for use in all your applications.
- When you're finished using fonts, you can deactivate them at any time. Fonts that are temporarily active deactivate when you disconnect from Universal Type Server.
- The Universal Type Client shows fonts activated through your system, which are always active, and your personal workgroup of fonts (if you have one).
- You can activate and deactivate fonts while [working offline](#) as well.

## Selecting a Workgroup

The **Workgroups** pane in the Universal Type Client lists all the workgroups to which you belong. Click on a workgroup to select it and begin working with its fonts and sets.

The workgroups function as follows:

- In most cases, you will belong to only one workgroup, and it is automatically selected for you.
- Your ability to add, delete, and collect fonts may vary among workgroups.
- Any fonts activated through your system or another font manager are listed in the System Fonts workgroup. You cannot activate or deactivate them through the Universal Type Client.
- If the administrator gave you a personal workgroup, it is named "Personal Workgroup." You can add, delete, collect, and create sets of fonts in your personal workgroup, even if your abilities are limited in other workgroups.

**NOTE:** Although you may have permission to work with fonts in multiple workgroups, it is not most ideal workflow. The plug-ins can restrict auto-activation of fonts to a single workgroup. By using multiple workgroups, the plug-ins are not able to create font sets from fonts in multiple workgroups. In addition, if you use fonts from multiple workgroups in a document, then send the document to other users, those users may not have access to all the necessary workgroups.

## Activating Fonts

The Universal Type Client allows you to activate and deactivate fonts as you need them. When a font is active, it's available to all applications while you're connected to Universal Type Server. The Universal Type Client provides a wide range of options for selecting fonts in the open workgroup and activating or deactivating those fonts. Depending on your needs and workflow, you can activate a typeface family while designing a new document, activate a set for a project, or activate a single font used in a document that you're editing.

## Selecting Fonts to Activate or Deactivate

You can select individual fonts, multiple fonts, families, and sets to activate or deactivate:

- Click to select an item (a font, family, or set).
- To select multiple items, Command+click (Mac) or Ctrl+click (Win).
- To select a range of continuous items, Shift+click the first and last item.
- To view families, choose **View > Group Fonts by Family**, or press Command+E (Mac) or Ctrl+E (Win).
- To view individual fonts within a family or set, twist open the family or set.

**NOTE:** You can select a combination of items at the same time, such as a family and an individual font, but you cannot select items in the **Workgroups** pane and the **Fonts** pane at the same time.

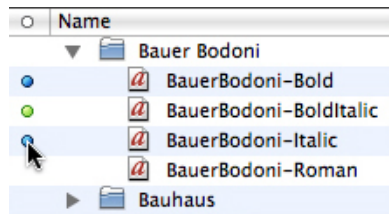
## Activating Selected Fonts

You can activate fonts temporarily (until you log off from your system) or permanently (until you deactivate them).

**NOTE:** If the fonts you are activating [conflict](#) with fonts you've already activated or fonts active through your system, an alert displays. Read the alert, then click **OK**.

To temporarily activate selected fonts:

- Click the **Temporary** button on the toolbar.
- Choose **File > Activate**.
- Press Command+O (Mac) or Ctrl+O (Win).
- Click in the **Activation** column, indicated by a dot, to the left of a font, family, or set. (You can click in this column without first selecting fonts.)



To permanently activate selected fonts:

- Click the **Permanent** button on the toolbar.
- Press the Command key (Mac) or Control key (Win) while you click in the **Activation** column, indicated by a dot, to the left of a font, family, or set.

## Deactivating Fonts

To deactivate fonts, select the fonts, families, or sets in Universal Type Client, then:

- Click the **Deactivate** button on the toolbar.
- Choose **File > Deactivate**.
- Press Command+K (Mac) or Ctrl+K (Win).
- Click the button in the **Activation** column to the left of a font, family, or set. (You can click in this column without first selecting fonts.)

## Understanding Font Activation

Universal Type Server can activate an almost unlimited number of individual font files, caching the fonts on your system to ensure speed. As always with a font manager, the idea is to activate the fonts you need, when you need them. Keeping hundreds or thousands of fonts active can impact the performance of your system and your applications.

## Determining a Font's Status

To determine the status of a font, family, or set, check the state of the button in the **Activation** column to the left of it:

- A blue dot means all the fonts are active temporarily.
- A green dot means all the fonts are active permanently.
- A white dot means that fonts in a family or set have mixed activation status. Fonts in the set or family may be active permanently, active temporarily or inactive.
- A blue diamond means fonts were automatically activated by a plug-in.

## Activating Fonts Permanently

When you activate fonts permanently in any workgroup, they activate automatically each time you connect to Universal Type Server. Permanently active fonts remain active the entire time your computer is connected to Universal Type Server. If you log off, the fonts are activated again the next time you connect.

The administrator also has the option to permanently activate certain fonts by creating a startup set that activates automatically when you connect. If you see a set with a green dot, all of the fonts in the set are automatically and permanently activated by Universal Type Server.

## Activating Fonts Temporarily

When you activate fonts temporarily, they stay active until you log off Universal Type Server. (If your computer crashes, Universal Type Server reactivates fonts that you have activated temporarily.)

In general, use permanent activation for fonts that you use daily, and use temporary activation for the fonts that you use for quick jobs. If you're going to work on a project for several days, you might activate its fonts permanently, then deactivate them when you're finished with the project.

## Activating Font Faces Within Families

The Universal Type Server Client activates a single font face at a time— not entire typeface family or suitcase. For example, activating CaflichScriptPro-Light does not activate the entire Caflich Script Pro family.

If you want to ensure that all variations of a typeface are available, select the entire family and activate it (**View > Group Fonts by Family**; Command+E on Mac, Ctrl+E on Win).

## Caching Fonts

To speed the process of activating fonts, Universal Type Server caches fonts on your system. When you activate a font through the Universal Type Client, Universal Type Server first checks the cache. Cached fonts are compared to fonts on the server to make sure they haven't changed, then activated on your system. The administrator specifies how each user's fonts are cached. The way your fonts are cached controls which fonts are available when you work offline.

See [Understanding Cached Fonts](#) in the Getting Started section for more information.

## Updating Font Menus

In applications that dynamically update their font menus, active fonts are immediately added to the font list (these include most of the major graphics applications, such as QuarkXPress, InDesign, Photoshop, Illustrator, and Freehand). If an application is not capable of dynamically updating its font menus, you need to relaunch the application to access newly activated fonts.

## Handling Activation Conflicts

The Universal Type Client handles font conflicts based on your preferences.

To set activation conflict preferences:

1. Choose **Universal Type Client > Preferences** (Mac) or **Edit > Preferences** (Win).
2. Select an activation option:
  - Activate the requested font.
  - Keep the current font active.
3. Enable the **Notify if Conflict Occurs** option if desired.
4. Click **OK** to accept the new settings.

**NOTE:** If a font is activated by a startup set, you are not able to override or deactivate the font.

## Working with Auto-Activation Plug-ins

To automatically activate precisely the correct fonts used in documents, Universal Type Server provides plug-in software modules that uses the Extensis Font Sense technology.

The plug-ins work by saving Font Sense metadata — that uniquely identifies fonts — with documents, and then using the metadata to auto-activate the correct fonts.

In addition, to enable precise font identification and activation, the Universal Type Server plug-ins can identify all the fonts used in a document, and then create a set or collect the fonts for delivery to a service bureau. The **Collect Fonts for Output** feature and the **Create Document Set** feature both streamline the process of locating all of the disparate fonts used in documents.

## Understanding Font Sense Technology

As most publishers know, when you open a document and it requires a specific font, activating any font with that name is not an option. In the font world, Helvetica is not Helvetica is not Helvetica. Using the wrong fonts can result in text reflow, which can alter line breaks, affect the design, cut off text, etc. To ensure that you're always using the correct fonts, Universal Type Server and Font Sense provide unique font identification and automatic activation. Even fonts from the same foundry, such as Adobe Garamond, exist in multiple versions.

Font Sense technology is designed to overcome the limitations of font names. Most applications record the names and sometimes the types (OpenType, PostScript, etc.) of fonts used in documents. But with the various types of fonts, vendors, and versions that exist, font names are not unique identifiers. Most users have multiple versions of many fonts on their machines — particularly common fonts such as Helvetica and Times — and the applications they use cannot identify which versions are used in their documents. Font Sense solves this by saving complete font metadata into documents.

The font metadata generated by Font Sense starts with the name, type, foundry, and version number of the fonts. Then, for truly unique font identification, the metadata includes additional items such as checksum values. The final result is the Font Sense identification number, which you can view in the Universal Type Client (**View > Columns > Font Sense**).

Each time you save a document in a supported application, the Universal Type Server plug-in records updated Font Sense metadata with the document. The documents no longer rely solely on names to identify the fonts used in them.

When you open documents containing Font Sense specifications, the Universal Type Server plug-ins use the Font Sense data to determine and activate precisely the right fonts. Since the font metadata is saved within the document, detailed font information travels with it. No matter where the document is opened, Font Sense knows precisely which fonts to activate.

## Preparing Documents and Workgroups

The ultimate goal of using Font Sense is that you — and the people in your workflow — never encounter missing fonts, font conflicts, or issues with multiple versions of the same font. To make this happen, you need to:

- Make sure documents have [Font Sense metadata saved with them](#). If the documents were previously opened with the plug-ins from Font Reserve, Font Reserve Server, or Suitcase Fusion, they will already contain this data.
- Make sure users have access to all the fonts they need by reviewing the fonts and members assigned to each workgroup. The plug-ins only auto-activate and create sets from fonts in one workgroup.
- Plan your font workgroups in Universal Type Server to ensure that all the fonts used to design a document are in a single workgroup. Also, be sure that all the users who may work on the document are members of that workgroup. This is the only way to ensure that all the users who work on a document have access to the fonts.

**NOTE:** Users with the **Activate Fonts Across Workgroups** permission can choose **Select Workgroup > All Workgroups** to auto-activate fonts in multiple workgroups. Unless all users have this permission, though, you should still design documents with fonts from a single workgroup.

## Saving Font Sense Metadata with Documents

Font Sense is designed to ensure that the precise fonts used in a document are auto-activated each time the document is opened, revised, and printed. If you use Font Sense consistently — and make the appropriate fonts available to other users — you should never encounter missing fonts, font conflicts, or confusion regarding multiple versions of the same font.

When you get started using the plug-ins, however, many documents will not have Font Sense information in them. In a service bureau or agency environment, in which you receive many documents and fonts from the outside, it is worth your time to save Font Sense data within your documents. To do this:

1. Set up a “preflight” workstation to handle all incoming documents.  
**NOTE:** The workstation should have a copy of Universal Type Server, all the applications you support with the Universal Type Server plug-ins enabled (QuarkXPress, Illustrator, InDesign), and **Enable Font Sense support** is enabled in the **Universal Type Auto-Activation Preferences** for each application. Users manning the workstation should be workgroup or font administrators.
2. Add each document’s fonts to a workgroup as a set. Activate only that set; be sure that no other fonts are active through Universal Type Server.
3. Open the document with the plug-in running.
4. Make a small change to the document and save it. This records the Font Sense metadata within the document.
5. Use the **Create Document Set** command (from the **Type** menu of Adobe products; **Utilities > Universal Type Client** menu of Quark products) to create a set for the document.
6. Share the document set so that all users in the workgroup have access to the fonts.
7. Close the document.  
**NOTE:** You can also preflight any existing documents that do not have Font Sense data. Let the plug-ins automatically activate the “best” fonts or choose the fonts yourself. Then save the documents to record Font Sense metadata with them.

## Installing Universal Type Server Plug-ins

Universal Type Server includes plug-ins for Illustrator, InDesign, and QuarkXPress.

When you install the Universal Type Client, the plug-ins are installed automatically in the Plug-Ins folder within Adobe application folders and in the XTensions folder within Quark application folders. For this reason, it is important to install your design applications before installing the Universal Type Client.

## Enabling and Disabling Plug-ins

Enable and disable Universal Type Server plug-ins the same way you manage other plug-in software.

- To manage Illustrator plug-ins, use the **Preferences > Plug-ins & Scratch Disks** command in the **Illustrator** menu (Mac) or the **Help** menu (Win).
- To manage InDesign plug-ins, use the **Configure Plug-ins** command in the **InDesign** menu (Mac) or the **Help** menu (Win).
- To manage a Quark XTension, use the **XTensions Manager** command in the **Utilities** menu.

**NOTE:** As with other add-on software, you must restart an application to load the plug-ins.

## Automatically Activating Fonts

When you open a document with a Font Sense metadata, the plug-in auto-activates the precise fonts used in the document — provided the fonts are present in the selected workgroup(s). Each time you save the file, the plug-ins update the Font Sense data as necessary.

When you open documents with Font Sense data and the fonts are available, you should never experience missing fonts, font conflicts, or issues with multiple versions of the same font. In general, the plug-ins work seamlessly in the background. Once you choose a workgroup, you can begin opening documents with confidence that all the right fonts will be auto-activated.

## Selecting a Workgroup

When you launch an application, before you open any files, choose which workgroup from which you want to automatically activate fonts. To select a workgroup, choose an option from the **Select Workgroup** submenu in the **Type** menu (Adobe products) or the **Utilities > Universal Type Client** menu (Quark products).

The workgroups function as follows:

- When you open documents, the plug-ins auto-activate fonts within the selected workgroup.
- You can change workgroups at any time, even while a document is open and fonts are active.
- If you have the **Activate Fonts Across Workgroups** permission, you have an additional option called **All Workgroups**. You can select this to auto-activate fonts in all the workgroups you belong to.
- If you do not have the **Activate Fonts Across Workgroups** permission, you can activate fonts in other workgroups manually through the Universal Type Client.
- If you open a document and all the fonts are reported as missing, you may have the wrong workgroup selected. Switch workgroups and then check the document's fonts. The **Select Workgroup** submenu and the **Check Document Fonts** commands are in the **Type** menu (Adobe products) or the **Utilities > Universal Type Client** menu (Quark products).

**NOTE:** When you're using the Universal Type Server plug-ins, it's helpful if you design documents with fonts from only one workgroup. If you use fonts from multiple workgroups in the same document, you cannot be guaranteed that all the users who work on the document have access to those fonts. In addition, the plug-ins are only able to auto-activate fonts and make font sets for fonts in a single workgroup. They can, however, collect fonts for output from multiple workgroups

## Scanning Documents for Fonts

When you open a document that contains Font Sense metadata, the Universal Type Server plug-in scans the document to see what fonts are used in it, and then automatically activates precisely those fonts (provided the fonts reside in the selected workgroup). The following fonts are considered to be "used" in a document:

- Fonts applied to text.
- The font specified in the application's Normal style sheet (usually Helvetica).
- Fonts applied to text on master pages, whether or not the master pages are applied to document pages.

**NOTE:** By default, the Universal Type Server plug-ins activate individual instances of fonts rather than all the fonts in entire typeface families. For example, if a document requires Minion-Bold, a plug-in would activate only Minion-Bold, not the entire Minion family. You can, however, choose to activate entire suitcases by enabling the **Activate entire font family** in the **Universal Type Auto-Activation Preferences**.

## Scanning Graphics for Fonts

For complete automatic font activation, the Universal Type Server plug-ins can scan graphic files imported into documents and activate the fonts used in them. The plug-ins will consult any Font Sense metadata saved with graphic files for the most accurate automatic activation. If Font Sense data is not available for a graphic file, the plug-ins identify fonts by name.

**NOTE:** Currently, Font Sense metadata is saved only with EPS files exported from Illustrator.

## Handling Missing Fonts

If you open a document and a **Missing Fonts** dialog box displays, first make sure you have the appropriate workgroup selected in the plug-in. If switching workgroups doesn't solve the problem, note the details about the missing fonts and discuss the problem with a system administrator. Ideally, someone can acquire the missing fonts and add them to the appropriate workgroups.

## Picking the "Best" Fonts

If you open documents that contain Font Sense metadata — and the appropriate workgroup is selected — you should rarely encounter missing fonts. In some cases, however, you may be missing the precise font. If other fonts are available with the same name, the plug-ins can auto-activate the “best” font for you to use (provided that **Pick best match when original is missing** is enabled in **Universal Type Auto-Activation Preferences**, as it is by default). The best font will be used in the document and its information will be recorded in the Font Sense metadata for future use.

In determining the “best” font, the plug-ins prefer (in order of importance):

- An active font over an inactive font (except for active system fonts)
- The Type in the Font Sense metadata; if that does not exist, OpenTypes are preferred over PostScripts, which are preferred over TrueTypes
- The Foundry in the Font Sense metadata; if that does not exist, Adobe is preferred over other foundries
- Higher versions are preferred over lower versions

**NOTE:** Although it's convenient to have Universal Type Server select fonts for you, keep in mind that the “best” font is not always the correct font. This is particularly true when you consider that Universal Type Server's first preference is for active fonts over inactive fonts. For example, if you keep a TrueType version of Helvetica permanently active, and a document requires a PostScript version of Helvetica, Universal Type Server will opt for the active TrueType version — even if you have other PostScript versions of Helvetica.

## Deactivating Automatically Activated Fonts

When you quit an application, any fonts that were auto-activated for that application are deactivated. You can change this so auto-activated fonts are deactivated when you close documents or shut down your computer/disconnect from Universal Type Server.

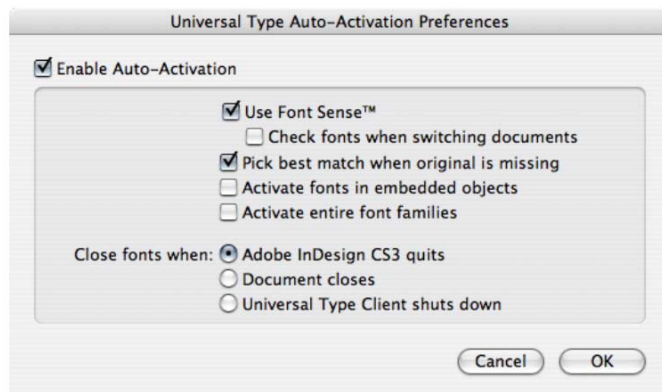
## Checking Document Fonts

Any time you want to ensure that all the fonts used in a document are active, you can use the **Check Document's Fonts** command in the **Type** menu (Adobe products) or the **Utilities > Universal Type Client** menu (Quark products). For example, if you drag an InDesign snippet onto a page or update a QuarkXPress composition zone, the fonts used in those items may not be active. Or, if you apply a previously unused style sheet to text, the font specified in it may not be active.

## Changing Universal Type Auto-Activation Preferences

Each plug-in has its own Universal Type Auto-Activation Preferences that control how it works. Before you begin using the plug-in, you may wish to confirm that the default preferences will work for you. Or, as you use a plug-in, you may find that a default setting is not appropriate for your workflow and need to change it. By default, the plug-ins auto-activate fonts according to Font Sense metadata when documents are opened, save detailed Font Sense data within documents, and deactivate auto-activated fonts when you close

documents. You must change preferences separately in each application (Illustrator, InDesign, and QuarkXPress).



To change any of these defaults for a plug-in, use the **Universal Type Auto-Activation Preferences** dialog box. On Mac, choose **Preferences > Universal Type Auto-Activation** from the application menu. On Windows, choose **Edit > Preferences > Universal Type Auto-Activation**.

## Enabling Auto-Activation

When the **Enable Auto-Activation** plug-in preference is enabled, the plug-ins scan documents as you open them to determine the necessary fonts. The plug-ins identify fonts by looking at the document's Font Sense data, if available, or looking at the fonts by name where they are used in the document. Enable Auto-Activation is checked by default; to disable automatic activation, uncheck it.

## Enable Font Sense support

By default, the plug-ins save detailed Font Sense data within documents, and then use that information to auto-activate fonts in documents as you open them. Font Sense technology generates the metadata, which includes the font's name and other information such as its type, foundry, version, and other important font information. In general, using Font Sense results in superior automatic font activation. To disable it, disable the **Enable Font Sense support** option.

## Pick Best Match When Original Is Missing

By default, when you're using automatic activation and a font conflict occurs, the plug-ins automatically [pick the "best" font](#). Font conflicts may arise if more than one font in the selected workgroup(s) has the same name, such as Helvetica or Times, and the plug-in is unable to determine which font was used to create the document. If you prefer to resolve conflicts yourself, disable **Pick best match when original is missing**.

## Activating Fonts in Embedded Objects

When **Activate fonts in embedded objects** is enabled, the plug-ins look at the Font Sense metadata saved with EPS documents to auto-activate fonts.

**NOTE:** Currently, the only application capable of recording Font Sense specifications with graphic files is Illustrator, which saves them with EPS files.

## Activating Entire Font Families

By default, the Universal Type Server plug-ins activate individual font faces rather than all the fonts in entire typeface families. For example, if a document requires Minion-Bold, a plug-in would activate only Minion-Bold, not the entire Minion typeface family.

You can, however, choose to activate entire families by enabling the **Activate entire font family** plug-in preference. This can be helpful if, for example, you decide to apply bold or italics to body text — those instances of the base font will already be active. To see all the fonts in a family in the Universal Type Client, choose **View > Group Fonts by Family**, or press Command+E (Mac) or Ctrl+E (Win).

**NOTE:** Users with permission to modify families can change family groupings in Universal Type Server.

## Close Opened Fonts

You can specify when auto-activated fonts are deactivated — when you quit the application or when you close the document.. By default, the plug-ins deactivate fonts when you quit an application. To change this setting, click an option in the **Close opened fonts** area.

- **When [ application ] quits:** Quitting the design application deactivates all the fonts that were auto-activated since the last time you launched the application. This is the default setting.
- **On document close:** Closing the document deactivates auto-activated fonts when you close a document (provided the fonts aren't required by other open documents). Click this option if you need to keep a minimum of fonts active and if most of your documents use different fonts. Because Universal Type Server scans each document as you close it, this setting can get tedious if you open and close documents often.

**NOTE:** If you change this setting while documents are open, the change will apply to documents subsequently opened or created.

## The Universal Type Core

The Universal Type Client communicates with the server through a startup application that runs in the background called Universal Type Core. You can stop and start the Universal Type Core manually — although you will only need to do this in a trouble-shooting situation.

To stop or start the Universal Type Core:

- **Mac:** **System Preferences > Universal Type Core.** Click **Stop** or **Start**.
- **Win:** Choose **Start > Control Panel > Universal Type Core.** Click **Stop** or **Start**.

**NOTE:** With the Universal Type Core running, you do not need to keep the Universal Type Client open to keep fonts active or to activate fonts with the auto-activation plug-ins.

**NOTE:** The process name for the Universal Type Core in the Mac OS X Activity Monitor is `FMCore` and in Windows Task Manager is `FMCore.exe`.

## Adding, Deleting and Collecting Fonts

User permissions within each workgroup control whether you can add, delete, and/or collect fonts. If you belong to more than one workgroup, the permissions may vary among them — so you might be able to add fonts to one workgroup but not another. The administrator should let you know which workgroups you belong to and what permissions they have. Adding, deleting, and collecting work as follows:

- You add fonts to the selected workgroup.
- You can add fonts individually or as named sets. The Universal Type Client lets you drag-and-drop fonts or browse to a specific location to add fonts.
- Universal Type Server does not add orphan font files and it attempts to repair any font corruption issues.
- If any fonts are identified as potentially corrupt, and you have a personal workgroup, you are given the option to add the corrupt fonts to your personal workgroup.
- If you have permission to add fonts to a workgroup, you can also delete fonts.
- If you have Collect Fonts for Output permission in a workgroup, you can collect or export fonts from Universal Type Client and from graphics applications using the auto-activation plug-ins.
- If you have a personal workgroup, you can always add, delete, activate, and collect the fonts in your personal workgroup.
- If you are a full administrator, you can perform all these functions in that workgroup.

### Adding Fonts

If you have permission to add fonts to the selected workgroup, you can add fonts via drag-and-drop or choose **File > Add Fonts**. The fonts you add will be available to other members of the workgroup. While adding fonts, Universal Type Server scans them to collect information and check for corruption.

**NOTE:** Universal Type Server does not add orphan bitmap or orphan outline fonts. In addition, some repairs are made as fonts are added. See [Resolving Problem Fonts](#) for more information.

### Adding from a Mac OS or Windows Client

You can add cross-platform OpenType fonts from a Mac OS or Windows computer's Universal Type Client. Platform-specific fonts, however, need to be added from the proper operating system. For example, if you're adding Mac OS PostScript fonts, you need to add them from a Mac OS Universal Type Client.

### 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, you can either:

- Choose **File > Add Fonts**, or press Command+L (Mac) or Ctrl+L (Windows). Use the **Add Fonts** dialog box 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. You can also drag the folder to an existing set to create a nested set.

**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.

## Scanning Fonts to Add

When you add fonts, Universal Type Server performs a scanning process that finds, examines, and organizes all the fonts. The amount of time the scan takes depends on a variety of factors, including: the number of fonts you're adding, the speed of your computer, the speed of your connection, and the media the fonts are stored on.

- The progress of the scan displays in the **Activity** area across the bottom of the Universal Type Client. You can see a Progress indicator information about the operation such as **Searching for Fonts** or **Processing Files**.
- Double-click the **Progress** button to display the **Activity** window, which shows you the status of each font file being added. You can also choose **Window > Activity Viewer** (Mac) or **Tools > Activity Viewer** (Win), or press Command+0 (Mac) or Ctrl+0 (Win).
- Click the **Stop** button (the **X**) in the **Activity** area at the bottom of the Universal Type Client to stop adding the fonts. The fonts that are already added will remain in Universal Type Client. You can also click the **Stop** button for an individual font in the **Activity** window.

## Sharing Fonts with Other Workgroups

Once fonts are in a Universal Type Server workgroup, you can use them in other workgroups as well. Only one copy of a font resides in Universal Type Server's database, but you can make the font available to as many workgroups as you wish. To share fonts with another workgroup, you must be a member of both workgroups and have permission to add fonts to target workgroup, and collect fonts from the source workgroup. (The full administrators can always share fonts among workgroups.)

To share fonts with another workgroup:

1. In the Universal Type Client, select the source workgroup (the one containing the fonts you want to move to another workgroup).
2. Select the fonts or sets you want to copy to the target workgroup.  
**NOTE:** To select multiple items, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous items, Shift+click the first and last item.
3. Drag your selection onto the target workgroup name.

The fonts become members of both workgroups, but are not duplicated.

**NOTE:** You can't actually move fonts from one workgroup to another. To accomplish this, copy the fonts to the target workgroup, then delete them from the source workgroup.

## Resolving Font Problems

When fonts are added to Universal Type Server, the scanning process and the information collected help you clean up your font library and make sure all your fonts are usable. Universal Type Server does not add corrupt, orphan bitmap or orphan outline fonts. Duplicate fonts may still cause problems, so it is best to proactively manage your duplicates.

### Corrupt Fonts

Corrupt fonts are often the source of crashes and other problems. Universal Type Server defines a corrupt font as any font for which the font resources cannot be opened, appear to contain inconsistent information, or have incorrect values in important fields of the font file resource.

Most of the time, if a font is corrupt, it cannot be repaired. However, there are certain types of minor problems that can be corrected, and there are certain types of problems that can be safely ignored. The scanning process identifies corrupt or problem fonts — and depending on the type of problem — Universal Type Server (1) fixes the problem and adds the font to the workgroup, (2) ignores the problem and adds the font to the workgroup, or (3) determines that the font is corrupt beyond repair and does not add the font to Universal Type Server.

You are notified if fonts are considered corrupt and beyond repair, and thus cannot be added to the server. If you have a client-based personal workgroup, you are given the option to add the corrupt fonts to a new "corrupt fonts" set in your personal workgroup. Fonts in your personal workgroup are not added to the server, so there's no need to be concerned that others may inadvertently use a potentially corrupt font. You can choose to delete these fonts, or activate them locally as is. Fonts that are identified as corrupt may be activated locally, but cannot be uploaded to the Type Server and shared with other users. Check with your administrator to see if you have a client-based personal workgroup.

If you have added any corrupt fonts to your personal workgroup, you might need to scan fonts in that workgroup for corruption.

To scan fonts for corruption:

1. Select a font, set or workgroup to scan for corrupt fonts.
2. Choose **File > Check for Corruption**.
3. Any corrupt fonts are placed into a new set within the selected workgroup.

### Duplicate Fonts

In Universal Type Server, a "duplicate font" is a font with the same Font Sense ID — meaning the exact same name, foundry, type, version number, FOND ID, kerning table, and outline file size as another font in Universal Type Server. There are no true duplicates in Universal Type Server.

Since the criteria for duplicate fonts is so specific, you may see several fonts with the same name in a workgroup. Often, it's a simple matter of having two different versions of the same font. In general, workgroups should have only one version of each font. To pare your workgroups down to one version of each font:

1. Choose **Edit > Find Fonts**, or press Command+F (Mac) or Ctrl+F (Win).
2. Choose **Duplicates** from the drop-down menu. This option shows different versions of the same font in the selected workgroup.
3. If necessary, click the **Name** column to sort fonts alphabetically, and disable **View > Group Fonts by Family** (Command+E on Mac; Ctrl+E on Win).

4. Try to determine the differences between the fonts. If you need to display more information, choose options from **View > Columns**.
5. Once you determine the differences, decide which font to keep and [delete the other font](#) from the workgroup.  
Tip: Before deleting, create a backup of the fonts by collecting them to other media.

If you need multiple versions of the same font in a workgroup — for example, in a workgroup for advertisers' fonts — you can leave “duplicates” in the workgroup.

## Deleting Fonts

If you have permission to add fonts to a workgroup, you can also delete fonts in that workgroup. You can delete fonts for any reason — whether they're outdated, corrupt, orphans, unused, unlicensed, etc. The fonts you delete are removed from the workgroup instantly and no longer display in the Universal Type Client. However, if they are active on users' computers, they stay active until the users disconnect from Universal Type Server.

## Understanding Font Deletion

The consequences of deleting fonts in multiple workgroups, fonts in a single workgroup, and sets are different:

- If you delete a font that belongs to multiple workgroups, it is only deleted from the current workgroup.
- If you delete a font that is exclusive to the current workgroup, it is deleted from Universal Type Server entirely.
- Deleting a set simply deletes the folder containing the references to the fonts; it does not delete fonts from the workgroup. (Depending on your permissions, you may not be able to delete shared sets.)

## Deleting Fonts from a Workgroup

Before deleting fonts, notify any users who may be using the fonts or may need them in the future. If deleted fonts are active on users' computers, they stay active until the users disconnect from Universal Type Server. If users are offline, the fonts are removed when they return online and synchronize with the server.

To delete fonts:

1. Launch Universal Type Client and select a workgroup.
2. Select the fonts, families, or sets you want to delete.  
**NOTE:** To select multiple items, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous items, Shift+click the first and last item.
3. Choose **Edit > Delete from Workgroup**, or press Command+Delete (Mac) or Delete (Win).
4. When the alert asks you to confirm the deletion, click **Remove** (Mac) or **Yes** (Win).

**NOTE:** If the **Edit > Delete from Workgroup** command is gray, you do not have the necessary user permission to delete fonts from the selected workgroup.

If you are a Full Administrator of your Type Server, you are also able to selectively delete fonts from any workgroup, including any user's personal workgroup. You can view all of the workgroups that contain a font using the font information attributes pane.

To selectively delete fonts from any workgroup:

1. Launch Universal Type Client and select a workgroup.
2. In the lower left corner of the interface, click the **Font Information** button to display the font information attributes pane.
3. Select a single font face. The font information display info for one font face at a time and does not support multiple selections.
4. Select a workgroup name from the drop-down menu. The workgroups menu contains all of the workgroups that contain the selected font face. You must be a full administrator to view the personal workgroups of other users as well as workgroups to which you are not a member.
5. Click the **Delete from Workgroup** button to remove the font face from the selected workgroup.

## Deleting Fonts from All Workgroups

To remove a font entirely from Universal Type Server, Full Administrators can select the font in the **All Server Fonts** workgroup and delete it. The font is removed from all workgroups and from the server database.

## Collecting Fonts

If you have permission to collect fonts from a workgroup, you can collect fonts to create copies that are independent of Universal Type Server. Usually, you collect fonts so you can supply them to an output provider. You have three options for collecting fonts:

- Dragging and dropping selected fonts.
- Using the **File > Collect Fonts for Output** command in the Universal Type Client to collect selected fonts.

## Collecting with Drag and Drop on Mac OS X

If you have permission to collect fonts from a workgroup, using the Type Client in Mac OS X you can collect select fonts by dragging them out of the Universal Type Client.

To collect fonts on Mac OS X:

1. Launch Universal Type Client and select a workgroup.
2. Select any sets, families, or individual fonts you want to collect.  
**NOTE:** To select multiple items, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous items, Shift+click the first and last item.
3. Drag your selection to the desktop or any media such as a Flash drive.

A copy of all the fonts is placed in a folder called Collected Fonts in the specified location.

**NOTE:** A plus sign indicates that you can collect the fonts to the desired location. If the plus sign does not display and the fonts bounce back, you do not have the necessary user permission to collect fonts. If you have permission to collect fonts from one workgroup, but not another, only the fonts that you have permission to collect are included.

## Collecting Fonts from Design Applications

Universal Type Server provides auto-activation plug-ins for popular graphic design applications — including Adobe Illustrator, Adobe InDesign, and QuarkXPress — that add a **Collect Fonts for Output** command directly to the application. The Collect Fonts for Output feature creates a copy of all the fonts applied to text on printing pages in the active document (or layout).

When a document is finished and ready for delivery to a service bureau, you can collect fonts for output.

To collect fonts:

1. Open the document or select the layout and make sure no fonts are missing. The plug-ins cannot collect missing fonts.
2. Choose **Collect Fonts for Output** from the **Type** menu (Adobe applications) or the **Utilities > Universal Type Client** menu (Quark applications).
3. Use the directory dialog box to navigate to a location for the new fonts folder.
4. Type a name for the folder in the field.
5. Click **Save**. Universal Type Server copies the fonts and places them in the new folder in the specified location.

You can deliver the folder of fonts to the service bureau or production department along with your other files.

**NOTE:** If the Collect Fonts for Output command is not available, you do not have permission to collect fonts from the workgroups containing the required fonts. If possible, documents should be designed with fonts from a single workgroup to ensure that everyone working on the file has access to the same fonts.

**NOTE:** If you have permission to collect fonts from one workgroup, but not another, only the fonts that you have permission to collect are included.

## Collecting Fonts from the Client

If you have permission to collect fonts from a workgroup, you can use the **Collect Fonts for Output** command to collect selected fonts.

To collect fonts for output from the Client:

1. Launch Universal Type Client and select a workgroup.
2. Select sets, families, or fonts in the workgroup.
3. Choose **File > Collect Fonts for Output**, or press Command+D (Mac) or Ctrl+D (Win).
4. In the **Choose the destination for the collected fonts** dialog box, navigate to any drive, media, or location you wish and click **Choose**.

A copy of all the fonts is placed in a folder named Collected Fonts in the specified location.

**NOTE:** If the **File > Collect Fonts for Output** command is gray, you do not have the necessary user permission to collect fonts from the selected workgroup.

**NOTE:** If you have permission to collect fonts from one workgroup, but not another, only the fonts that you have permission to collect are included.

## Sorting and Finding Fonts

The Universal Type Client provides many options for displaying the fonts within a workgroup. You can decide which fonts to list and how much information you need about them (such as foundry, class, and version). In addition, you can arrange the columns of font information and sort fonts according to any criteria you prefer. The Universal Type Client also lets you list fonts individually — Minion, Minion Bold, Minion Italic, etc. — or by typeface family — simply Minion.

The **Find** controls in Universal Type Client let you quickly display specific collections of fonts within a workgroup. For example, you can display only OpenType fonts, only active fonts, or only PostScript Serif fonts by Adobe. If you need to find the same collections of fonts over and over again, you can save find criteria as “smart sets,” which update to display all the fonts in a workgroup that match the smart set criteria.

## Working with Columns of Font Information

The Universal Type Client’s Fonts pane can display a column of font information for each font that includes: Type, Foundry, Class, Family, Version, Font Sense (number), Added By, Date Added, Menu Name, and Licensed. By default, the Universal Type Client displays a column for Type, Foundry, Class, Family, Version and Licensed, in that order. You can display any combination of columns that is useful to you, arrange the columns so you can easily see the information you need, and sort fonts according to any column.

- **Display Columns:** Choose **View > Columns** or Control+click (Mac) or Right+click (Win) a column heading to enable or disable columns of font information. If necessary, scroll to the right or expand the Universal Type Client window to see all the columns.
- **Arrange Columns:** Drag the column headings (such as **Type** or **Version**) to change the order of columns. To adjust the width of a column, drag the separator bar between the column headings.

Name	Foundry	Type
▶ Futura	Adobe Systems	PostScript
▶ Gill Sans	Adobe Systems	PostScript
▶ Goudy	Adobe Systems	PostScript
▶ Helvetica Neue	Adobe Systems	PostScript
▶ ITC Century	Adobe Systems	PostScript

- **Sort By Column:** Click a column head to sort fonts or families according to that information — for example, click **Class** to sort alphabetically by classification.

**TIP:** If you need to see a font’s keywords or styles, or more details about a font’s license, select a font and display the **Attributes** pane (**View > Show Attributes**).

## Grouping Fonts By Family

Rather than list fonts individually in the Fonts pane, the Universal Type Client can group fonts by typeface family. When fonts are grouped by family, you can perform font management activities on the entire family in one operation, including activating and deactivating, adding fonts to sets, changing font attributes, and collecting fonts.

To group fonts by family:

- Choose **View > Group Fonts by Family**.
- Press Command+E (Mac) or Ctrl+E (Win).

To view and work with fonts in a family:

- To view the fonts within a family, click the arrow next to a family's folder.
- If you are displaying fonts according to specific find criteria, such as foundry, only fonts that fit the criteria are displayed within each family.
- To perform an operation on an entire family, such as activating it, click the family's folder. To select multiple families, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous families, Shift+click the first and last item.

## Understanding Family Groupings

When Universal Type Client groups fonts into a family, it uses the following criteria:

- **Name:** Fonts with the same family name.
- **Foundry:** Fonts are from the same foundry. Therefore, a Bauhaus font from Bitstream will be placed in a different family than a Bauhaus font from Monotype.
- **Type:** Fonts are the same type. Therefore, a PS Pair Helvetica font will be placed in a different family from a TrueType Helvetica font.

These criteria often produce multiple families with the same name — such as a TrueType Times from Apple and PostScript Times from Adobe. To tell the difference between families, look at the **Type** and **Foundry** columns. In addition, if the current workgroup has two different versions of a font with the same name, foundry, and kind, they will be placed in the same family. For example, you might have two different versions of Garamond-Book in the Garamond family.

## Regrouping Font Families

If the way Universal Type Client creates its typeface family groupings is not helpful to you, users with permission to modify families can move fonts into other families and rename font families. For example, some foundries such as Letraset name each instance of a font individually — so there is no family name for Universal Type Client to use. Moving fonts to another family affects the fonts in all workgroups.

To move fonts to other families:

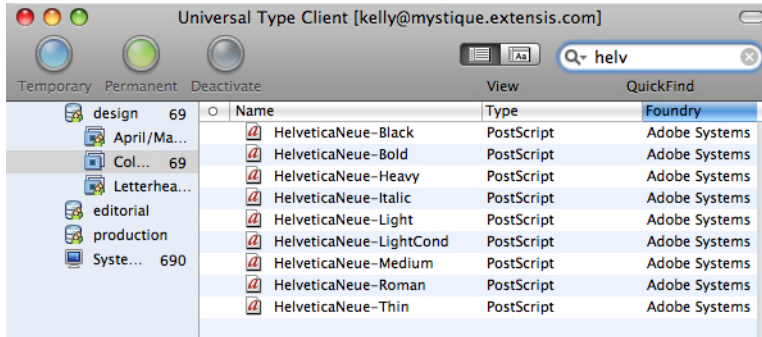
1. Choose **View > Group Fonts by Family**, or press Command+E (Mac) or Ctrl+E (Win).
2. Open a family containing fonts you want to move.  
**TIP:** To select fonts, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous fonts, Shift+click the first and last item.
3. Select the fonts you want to move.
4. Drag the selected fonts to the new family.
5. To rename a font family, click its name and type a new name.

To revert fonts to the default families:

1. Select a font or family.
2. Choose **Edit > Restore Families**.

## Using QuickFind

The **QuickFind** tool is the fastest way to locate a font or family. Select a workgroup or set, click in the QuickFind field and starting typing the name — the **Fonts** pane automatically updates to list fonts or families with the name you enter. Click the delete button on the box to clear the field and list all fonts and families again.



**NOTE:** If you do not see the **QuickFind** tool, you may need to choose **View > Show Toolbar** (Mac) or **View > Toolbar** (Win). On Mac OS X, if your toolbar is showing and you still cannot see the QuickFind tool, choose **View > Customize Toolbar** and then drag the QuickFind tool back to the toolbar.

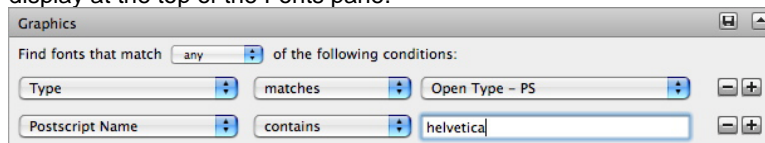
**NOTE:** The **QuickFind** tool is also available within the **Licenses** dialog box (**Window > Licenses** on a Mac, or **Tools > Licenses** in Windows), where it performs text searches through all of the licenses (for example, you might search for specific vendor names). The **Licenses** pane lists all the licenses that contain the search text. (You can only search text you enter into the fields; you cannot search dates selected from the menus.)

## Specifying Find Criteria

If you need to search for fonts by more than name, the **Find** controls give you additional options. With this feature, you can search for fonts by any combination of attributes such as name, foundry, keywords, style, type, classification and version. When you specify find criteria, you specify the criteria (such as “foundry”), a qualifier for each criteria (such as “matches”), and a value for each criteria (such as “Adobe” for a foundry). Your find can include an unlimited number of search criteria.

To search with the Find controls:

1. Choose **Edit > Find Fonts**, or press Command+F (Mac) or Ctrl+F (Win). The Find controls display at the top of the Fonts pane.



2. Choose an option from the drop-down menu to specify whether you want to **Find fonts that match ANY of the following conditions** or **Find fonts that match ALL of the following conditions**. For example, do you want to find only fonts from Adobe that are OpenType PS — or do you want to find all fonts from Adobe and all OpenType PS fonts?
3. Choose find criteria from the **Add Criteria** drop-down menu: Postscript Name, Menu Name, Family Name, Activation, Duplicates, Font Sense ID, Type, Version, Classification, Foundry, Keyword, Style, or Licenses.
4. Depending on the criteria you select, different drop-down menus and fields let you specify exactly what you’re searching for. If you choose **Type** as the criteria, for example, you can choose **matches** or **does not match**, and then choose from a list of font types supported by Universal Type Server.

5. To add additional criteria, click the **Add (+)** button. To remove criteria, click its **Remove (-)** button.  
**NOTE:** If you add search criteria, remember to check whether you are searching for fonts that match any or all of the search criteria.
6. As you specify find criteria, the **Fonts** pane updates to display only fonts in the selected workgroup that match the criteria. When you finish finding fonts, click the arrow in the upper-right corner to hide the **Find** tools.

## Using Smart Sets to Find Fonts

If you tend to find the same collection of fonts again and again—all OpenType PS Script fonts from Linotype, for example—you can save the find criteria as a smart set. When selected, a smart set automatically updates itself to display all fonts within the workgroup that match the find criteria.

To create a smart set:

- **From find criteria:** If the **Find** controls are displaying and the find criteria is already set up, click the Save button. Double-click the new smart set that displays in the selected workgroup to rename it.
- **From scratch:** Click the **New Smart Set** button below the **Attributes** pane. Use the **Find** controls above the Fonts pane to specify the smart set criteria, and double-click the new smart set that displays in the selected workgroup to rename it.

To edit the criteria for a smart set, Control+click (Mac) or Right+click (Mac or Win) the set and choose **Edit Smart Set**.

## Viewing font info in the Attributes pane

When you select a single font face, the font information pane displays the workgroups that contain the font, as well as who added the font and when.

Typically the information pane displays only the workgroups to which you are a member. If you are a Full Administrator of server, you are also able to view all other workgroups that contain the font, including all other user's personal workgroups.

This is helpful if as an administrator you are trying to maintain font licensing compliance, and a user has added a font to a personal workgroup that brings your font usage beyond the number of licenses purchased. As a Full Administrator, you are able to select the user's personal workgroup and selectively delete the font face from his or her workgroup, thus bringing you back into compliance.

## Previewing Fonts

While you're designing a document, you may need to identify a font by look rather than by name. To quickly show you what fonts look like, Universal Type Client displays live previews of fonts selected in the **Fonts** pane. You can edit the preview text, choose the type of preview, and adjust the size. For example, if you're creating a new client logo, you might preview the client's name in a variety of selected fonts.

Previews can also be "torn-off" from the preview window to float above all other windows, or printed for further inspection and comparison.

## Displaying Previews

The Preview pane displays by default, but you can show and hide it as necessary. To see more previews, you can resize the Universal Type Client window and drag the divider between the Fonts pane and the Preview pane.

To display previews in Universal Type Client:

- Click the **Preview** button in the toolbar in the Mac Type Client or the **Preview** button at the far right of the Activity area on Windows.
- Choose **View > Show Font Previews** (Mac) or choose **View > Previews** (Win)
- Press Command+/ (Mac)

You can select fonts and families in the **Fonts** pane to preview. To select multiple items, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous items, Shift+click the first and last item.

## Customizing Preview Text

You can display any text you want in the Preview pane by choosing an option from the Preview Type drop-down menu and entering new text.

To choose a Preview Type:

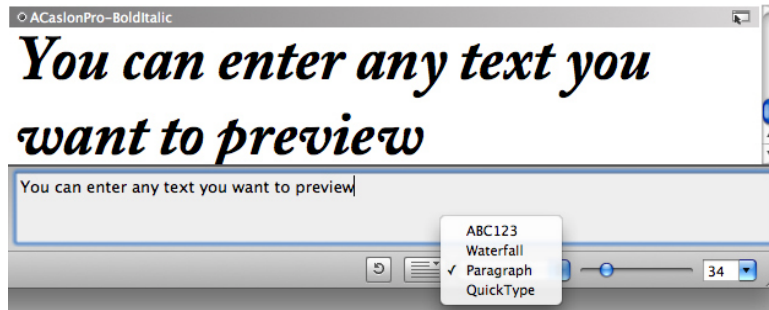
- **ABC 123**: Choose **ABC 123** to display the alphabet in uppercase, the alphabet in lowercase, and the numerals and symbols at the top of the keyboard.
- **Waterfall**: Choose **Waterfall** to display a partial alphabet and sample numerals at various sizes. Click the arrow to choose from a scrolling drop-down menu of other preview text options, including a full uppercase and lowercase alphabet, numerals, and a sentence.
- **Paragraph**: Choose **Paragraph** to display a full paragraph of text so you can judge the font's color.
- **QuickType**: Choose **QuickType** to quickly enter a line of text to preview. Click the arrow to choose from a scrolling drop-down menu of preview text options, including non-Roman character sets.

You can type or paste new text for the preview into the field as well.

To display this field:

- Choose **View > Show Preview Configuration**
- Click the **Preview Configuration** button at the bottom of the user interface.

You can enter text for any preview type — **ABC 123**, **Waterfall**, **Paragraph**, or **QuickType** — in the **Preview Configuration** field.



**NOTE:** To revert to the default preview text for the active preview, click the **Revert Preview Text** button below the **Preview** pane.

## Customizing Preview Size

You can display fonts in all the **Preview Types** in sizes from 9 point to 144 point. Drag the Preview Size slider or choose a point size from the drop-down menu to see the selected fonts at different sizes.

## Floating Previews

Floating previews are helpful when you want to preview a number of fonts in the context of a project without activating the fonts. Floating previews are torn off from preview window, but still respond to any changes in preview type and type size. To be most useful, you will likely want to use this feature in conjunction with QuickType previews.

Until they are closed, floating previews always display on top of all other applications in operating system.

### Tearing off a floating preview

To tear off a floating preview:

1. Choose one or more fonts in the Fonts pane.
2. If the preview window is not displayed, choose **View > Show Font Previews** or click the Preview button above the Fonts pane.
3. For each font preview that you want to create a floating preview, click and drag the Floating Preview button off of the Suitcase Fusion window.

As you change preview type, text and size, the floating preview updates to reflect your changes.

### Activating and deactivating

Just like all other font previews, you can activate or deactivate a font directly from the floating preview.

To activate or deactivate the font:

- Click the activation status icon in the floating preview.

## Closing multiple floating previews

If you have multiple floating preview windows on your desktop, it can be tedious to click the close icon on all of the previews. To make it faster to close multiple floating preview windows, they can be merged down into a single preview and then closed.

To close multiple floating previews:

1. Choose **Window > Floating Previews > Merge** or press Command-Option-M.
2. Click the close icon on the floating preview.

## Viewing Special Characters

If you need access to special characters that are not easily available from your keyboard, the Universal Type Client provides an easy way to open the Character Map on Windows or the Character Palette in Mac OS X. Both of these applications allow you to select and copy and paste characters from any active fonts for use in documents.

To open the Character Map or Character Palette:

- Choose **Edit > Special Characters**

The Universal Type Client also provides a method of revealing all of the glyphs available in selected font, and comparing those glyphs to those in other fonts. Use the Glyph View Window to view and compare selected fonts.

## The Glyph View Window

The Glyph View Window allows you to view and compare the glyphs from selected fonts. This tool can be helpful when:

- Comparing the details of a specific glyph in multiple fonts.
- Locating a specific character or symbol within a font.
- Determining how robust the character palette is in a font.
- Needing to know the Unicode value of a character, and what keyboard commands are used to create it.

To open the Glyph View window:

1. Select one or more fonts or font families in the Fonts pane.
2. Choose **Window > View Glyphs**.
3. In the Glyph View window, choose a font from the **Font List** drop down menu. The entire font's character set displays in the Glyph View window.
4. To narrow down the glyphs displayed, choose a code page from the **Show** drop down menu.
5. Hover over a glyph to display that glyph's Unicode number and if available, how to make that glyph with the keyboard.
6. Double-click a glyph to add it to the list of saved glyphs.
7. Use the left and right arrows to display the next or previous font.

## Printing Preview Pages

Even in our digital world, you sometimes just need to see something on paper for it to make sense. For this reason, Suitcase Fusion includes the ability to print sample pages of fonts in the preview window.

To print sample pages:

1. In the Fonts pane, select the fonts that you want to include in a printed sample page.  
To select multiple items, Command+click each item. Ctrl+click each item.  
To select a range of continuous items, Shift+click the first and last item.
2. If the preview window is not displayed, choose **View > Show Font Previews** or click the Preview button above the Fonts pane.
3. Customize the preview type, text and size. The sample pages include text across the width of a printed page using your text and size settings.
4. Choose **File > Print Preview Pane**.  
**NOTE:** If you have a large number of fonts in the preview pane, or a very large point size selected, it may take a long time and many pages to print.

## Working with Sets

Within each workgroup, you can group fonts into “sets” for specific clients, jobs, or templates. Sets display in the **Workgroups** pane within each workgroup, and they help you organize fonts within a workgroup. Sets can contain one or many fonts, as well as other nested sets.

- All users can create sets. The sets are saved with Universal Type Server according to each user name. Therefore, if you connect to Universal Type Server from another computer, you will still see your own sets.
- You can create as many sets as you need, place sets within other sets, and place the same font in more than one set.
- Once fonts are in a set, you can manipulate the fonts as one unit. For example, you can activate all the fonts, deactivate all the fonts, or collect all the fonts for delivery to a service bureau (if you have permission to collect from the workgroup).
- If you have permission to share sets, you can share your sets with other members of your workgroup.
- If you have permission to modify shared sets, you can change the fonts in shared sets and delete shared sets.

## Creating Sets

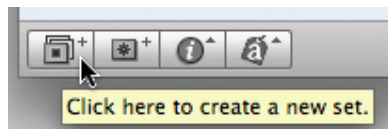
You can create an unlimited number of sets in each workgroup, and you can place an unlimited number of fonts into each set. Your sets are available whenever you connect to Universal Type Server, from any computer. You can create empty sets and drag fonts into them, you can add fonts as sets, you can create sets from open documents, and if you have permission you can share your sets with other members of the workgroup.

## Creating Sets and Adding Fonts

Sets are created within the selected workgroup and contain only fonts within that workgroup.

To create a new set, you can do one of three things:

- Choose **File > New Set**.
- Press **Command+N** (Mac) or **Ctrl+N** (Win).
- Click the **Create Set** button.



The new, untitled set's name is automatically highlighted so you can change its name.

To add fonts to a set:

1. In the **Fonts** pane, select the fonts you want to add to the set.  
**NOTE:** To select multiple items, **Command+click** (Mac) or **Ctrl+click** (Win). To select a range of continuous items, **Shift+click** the first and last item.
2. Drag the fonts to the set.

If you have permission to add fonts to the selected workgroup, you can also drag fonts from the desktop into a set. This adds them to both the workgroup and the set at the same time.

## Creating Sets while Adding Fonts

If you have permission to add fonts to the selected workgroup, you can create sets while adding fonts. This helps you retain any current organization you have for fonts, such as folders for individual clients or projects. 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 create sets while adding fonts, you can either:

- Choose **File > Add Fonts**, or press Command+L (Mac) or Ctrl+L (Windows). Use the **Choose fonts to add to workgroup** [name] dialog box 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. You can also drag the folder to an existing set to create a nested set.

**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.

For example, say you have a folder on your desktop called Magazine Articles that contains three folders: Editor's Letter, Features, and Departments. The folders contain the documents and fonts for each article. If you drag Magazine Articles into the **Workgroups** pane, Universal Type Server will add the fonts from all three folders and create a single set called Magazine Articles. If, what you want is a set for each of the three folders, you need to create an empty set called Magazine Articles, and then drag the three folders for Editor's Letter, Features, and Departments into it.

## Preventing Duplicate Fonts and Sets

Although Universal Type Server allows you to give sets the same name, and it allows you to place fonts with the same name in a single set, doing so can cause confusion. We recommend that you give sets unique names and avoid placing fonts with the same name in the same set (for example, two Helveticas from different foundries).

## Creating Sets from Open Documents

Universal Type Server provides auto-activation plug-ins for popular graphic design applications — including Adobe Illustrator, Adobe InDesign, and QuarkXPress — that add a **Create Document Set** command directly to the application. The Create Document Set feature creates a set consisting of all the fonts applied to text on printing pages in the active document (or layout).

For example, a 20-page newsletter in InDesign might use 90 or more disparate fonts. Creating a set in the Universal Type Client and then locating and adding each font to it would be difficult and time consuming. The auto-activation plug-ins can find the fonts and create the set automatically.

**NOTE:** When you're using the Universal Type Server plug-ins, it's helpful if you design documents with fonts from only one workgroup. If you use fonts from multiple workgroups in the same document, you cannot be guaranteed that all the users who work on the document have access to those fonts. In addition, the plug-ins are only able to auto-activate fonts and make font sets for fonts in a single workgroup. They can, however, collect fonts for output from multiple workgroups.

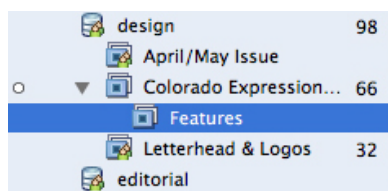
To create a set from a document:

1. Open a document and make sure all the fonts are active. (In QuarkXPress, open a project and select a layout.)
2. Confirm the workgroup selected in the **Workgroups** submenu (**Type** menu in Adobe applications; **Utilities > Universal Type Client** menu in Quark applications).  
**NOTE:** If you have permission to Activate Fonts Across Workgroups, you can choose All Workgroups.
3. Choose **Create Document Set** (**Type** menu in Adobe applications; **Utilities > Universal Type Client** menu in Quark applications).
4. Type a name for the set in the field.
5. Click **OK**.

If you have permission to share sets, you can share the set with other users. If the fonts in the file change, be sure to recreate the set or add the new fonts to the set manually.

## Nesting Sets

When organizing fonts, you can place sets within other sets, then manipulate the sets individually or all at once. For example, if you're working on a magazine, you may have a set for the entire magazine that contains an individual set for each section. When you're printing a proof of the magazine, you can activate the entire set. However, if you're simply editing one section, you can activate the set for that section.



You can nest sets indefinitely. This way you can create a few “master sets” for storing all your other sets. You can work with nested sets as follows:

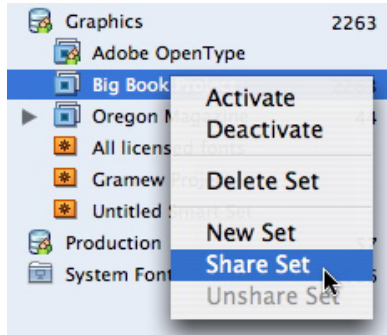
- **Creating New Nested Sets:** To create a new set within a set, select the parent set before you create the new set. If a set is selected, new sets are always created within it.
- **Nesting Existing Sets:** To nest an existing set, select it and drag it onto another set.
- **Removing a Set from its Nest:** To move a set outside its parent set, drag it above the set name.
- **Viewing Nested Sets:** To see nested sets, click on a set.

## Sharing Sets

If you have permission to share sets, you can share a selected set with the whole workgroup. For example, if everyone in your workgroup is working on a specific book, you can create a set of fonts used in the book, and then share it. You can recognize shared sets by the little group of people added to the set icon.

To share a set:

1. Select the set in the **Workgroups** pane.
2. Choose **File > Share Set**, or Control+click (Mac) or Right+click (Win) the set and choose Share Set from the menu.



When you share a set, you are effectively the owner of that set. You can rename it, add and remove fonts, nest it within other sets and so forth. If others in your workgroup need to be able to add and remove fonts from your set, be sure to tell your system administrator to enable the **Modify Shared Sets** permission for all users who need this ability.

When the workgroup is finished using the set, choose **File > Unshare Set**. Or, Control+click (Mac) or Right+click (Win) the set and choose **Unshare Set** from the menu.

## Modifying Sets

You can make changes to any sets you create — including copying fonts to other sets, deleting fonts from sets, and deleting entire sets of fonts. To make changes to shared sets, you must have permission to modify sets.

### Copying Fonts to Other Sets

Dragging fonts from one set to another moves the fonts to a different set. You can copy fonts from one set to another as well.

To copy fonts from one set to another:

1. Select the set containing the fonts you want to copy.
2. Select the fonts to move.  
**NOTE:** To select multiple items, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous items, Shift+click the first and last item.
3. To copy the fonts, press the Option key (Mac) or Alt key (Win) while you drag them onto another set.

## Deleting Fonts from Sets

You can modify the contents of your sets by removing fonts from them. For example, you may change the fonts required for a job and wish to update the set. Deleting fonts from sets does not require the workgroup to have delete permission because it does not remove the fonts from the workgroup or from Universal Type Server.

To delete fonts from sets:

1. Open the set containing the fonts you want to delete.
2. Select the fonts to delete.  
**NOTE:** To select multiple items, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous items, Shift+click the first and last item.
3. Choose **Edit > Delete from Set**, or press Command+Delete (Mac) or Delete (Win).

## Deleting Sets

You can delete entire sets, which will delete the set folder, nested sets, and fonts. Deleting sets does not require the workgroup to have delete permission because it does not remove the fonts from the workgroup or from Universal Type Server.

To delete sets:

1. Select the sets to delete.  
**NOTE:** To select multiple items, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous items, Shift+click the first and last item
2. Choose **Edit > Delete Set(s)** (Mac) or **Edit > Delete** (Win), or press Command+Delete (Mac) or Delete (Win).

**NOTE:** When you delete a shared set from a workgroup, that set is removed for all users in the workgroup.

## Renaming Sets

You can change the name of your sets anytime. If you have permission to modify sets, you can change the name of shared sets as well.

To rename a set, double-click the set name and type a new name.

## Working with Smart Sets

Universal Type Server provides a special kind of set that updates according to specific criteria. If you tend to search for the same collection of fonts again and again — all licensed OpenType PS from Font Haus, for example — you can create a smart set. In this case, the smart set will display all the fonts in the workgroup for which Licensed is Yes, Type is OpenType PS, and Foundry is Font Haus.

To create a smart set:

- **From find criteria:** Choose **Edit > Find Fonts**, or press Command+F (Mac) or Ctrl+F (Win). [Specify the Find criteria](#), then click the Save button. Double-click the new smart set that displays in the selected workgroup to rename it.
- **From scratch:** Click the **New Smart Set** button below the **Attributes** pane. Use the **Find** controls above the **Fonts** pane to specify the smart set criteria, and double-click the new smart set that displays in the selected workgroup to rename it.

To edit the criteria for a smart set, Control+click (Mac) or Right+click the set and choose **Edit Smart Set**.

**NOTE:** Smart sets cannot be shared.

## Using a Startup Set

The administrator can create sets of fonts within a workgroup that activate automatically every time you connect to Universal Type Server. This ensures that certain fonts are always active on your system. In fact, each time you connect, all the fonts in startup sets from workgroups you belong to are activated. Active startup sets are indicated by a green dot on the set icon.

Fonts activated in startup sets cannot be overridden. Contact the administrator if you have questions or concerns about any of the fonts in a startup set.

If you have permission you can turn an existing set into a startup set for all users in the workgroup.

To make a startup set:

1. Select an existing [shared set](#) in the **Workgroups** pane. Because startup sets activate fonts for all members of a workgroup the startup set must be created from a shared set.
2. Choose **File > Startup Set**. This activates the fonts for all workgroup users.

If you have the permission to create startup sets, you also have the permission to disable the startup set. This turns the startup set into a regular set for all users, who are now able to deactivate and override fonts in the set.

To disable a startup set:

1. Select the startup set in the **Workgroups** pane.
2. Choose **File > Startup Set**. This deactivates the startup set.

## Working with Classifications

A font's classification (class) describes its general look in historic terms — serif, sans serif, script, old style, etc. When fonts are added to Universal Type Server, they are classified according to subjective design attributes. Therefore, you may not agree with the classification of each font or you may feel limited by the default classification list. You can work with classifications as follows:

- If you're looking for fonts with a specific look, you can sort fonts by classification in the Fonts pane.
- You can use the Find controls to list only fonts with specific classifications.
- You can create smart sets to display an up-to-date list of all the fonts with specific classification.
- Each font can have only one classification applied to it.
- The classification applies to the font itself — so the font displays the same classification in all sets and all workgroups.
- If you have permission to create and delete classifications, you can add custom classifications.
- If you have permission to apply a classification to a font, you can change the classification and revert to the default classification. (In general, the administrator should reserve the ability to apply classifications to users with backgrounds in typography.)

## Classifying Fonts

When fonts are added to Universal Type Server, they are automatically assigned a classification. A font's classification is determined by comparing the font's family name to an internal database of font family names and their classifications. If Universal Type Server is unable to determine a font's classification, two hyphens display in the Class column.

The default font classification is not always correct — sometimes due to limitations of the database and sometimes due to the subjective nature of font classification. Although the classifications are based on conventional typographic principles, font classification is not a science. That's why Universal Type Server makes it possible to change a font's classification and create classifications.

The default classifications are:

- **Blackletter/Uncial:** A Blackletter typeface, such as Goudy Text, is characterized by medieval or old English lettering, with ornate capitals, roughly diamond-shape serifs, and thick, mostly-vertical strokes. Uncial, generally perceived as Celtic or Irish, is also an archaic form, with rounded letters and calligraphic qualities. American Uncial is a common Uncial typeface.
- **Clarendon:** A Clarendon (or ionic) typeface, such as Bookman, is an offspring of the slab serif typefaces in which the serifs are bracketed and the letterforms are more akin to sans serif letters, although contrast is usually low. They are popular for newspaper work because the sturdy serifs hold up well under adverse printing conditions. Besides Clarendon itself, Bookman is the most common Clarendon typeface.
- **Grotesque sans:** A Grotesque sans typeface, such as Univers, is the original sans serif letterform — functional and utilitarian. (Note that the term is a classification, and not a judgment of beauty.) Helvetica and Franklin Gothic are common grotesques.
- **Humanist sans:** A Humanist sans typeface, such as Gill Sans, is a sans serif typeface inspired by other letterforms, commonly serif or inscriptional models. Syntax and Optima are humanist sans serifs.
- **Modern:** A Modern serif typeface, such as Fenice, is characterized by vertical stress and strong contrast. Modern serifs and horizontals are very thin, almost hairlines. The serifs join to letters with an angle rather than a rounded join. Bodoni is the most common modern typeface.
- **Oldstyle:** An Oldstyle serif typeface, such as Garamond, is characterized by low to moderate contrast, diagonal stress, and serifs with a rounded join to the letter. Goudy Oldstyle and Garamond are common oldstyle typefaces.

- **Ornamental:** An Ornamental typeface, such as GiddyUp, is unusual or ornate, and either doesn't fit cleanly into other categories or is really only suitable for use at display sizes. This includes inline, outline, and engraved typefaces. Examples include Desdemona, Colonna, and Edda.
- **Sans serif:** A Sans serif typeface, such as Futura, is characterized by little to no contrast and no serifs. The sans serif classification includes only sans serif fonts that do not fit in the grotesque and humanist classifications. This includes geometric designs such as Avant Garde, and Art Deco faces such as Bodega Sans and ITC Anna.
- **Script:** A Script typeface, such as Zapfino, is based on hand lettering, whether with a broad-edge pen, a flexible steel nib, or a brush. This includes everything from children's handwriting to beautiful and ornate Elizabethan roundhand. Common scripts include Shelley, Brush Script, Present Script, and Mistral.
- **Serif:** A Serif typeface, such as Cochin, is characterized by the finishing strokes on characters that help lead the eye across a line. The Serif classification includes only serif fonts that do not fit well into a sub-classification such as oldstyle, transitional, modern, clarendon, or slab. This includes typefaces with unusual serifs, such as the triangular serifs of Versailles.
- **Slab serif:** A Slab serif typeface, such as Courier, is characterized by block-like rectangular serifs, sticking out horizontally or vertically with the same thickness as the body strokes. The serifs join with an angle rather than a rounded join. The letters have little or no contrast, and they often look like sans serif letters with slab-like serifs tacked on. Rockwell and Glypha are common slab serif typefaces.
- **Symbol/Pi:** A Symbol/Pi typeface, such as Zapf Dingbats (Zapf Dingbats), is a collection of symbols or pictures assembled into a font. Wingdings is a common symbol/pi typeface.
- **Transitional:** A Transitional serif typeface, such as Baskerville, is characterized by vertical stress and slightly higher contrast than oldstyle typefaces, combined with horizontal serifs and greater symmetry. Baskerville is a common transitional typeface.

## Sorting Fonts by Classification

By default, the **Fonts** pane includes a **Class** column that shows the classification applied to each font. If you do not have a **Class** column, choose **View > Columns > Class**, or Control+click (Mac) or Right+click (Win) a column heading and choose **Class**. Click the **Class** column's heading to sort fonts in the workgroup according to classification.

**NOTE:** To rearrange columns in the **Fonts** pane, click and drag the column headings.

## Finding Fonts by Classification

To find fonts in the current workgroup with specific classifications, choose **Edit > Find Fonts**, or press Command+F (Mac) or Ctrl+F (Win). Use the Find controls to display the fonts that match any combination of classifications. If you search for the same combination of classifications often, click the **Save** button to save the find criteria as a smart set. The smart set name is automatically highlighted so you can enter a new name.

**NOTE:** To search for fonts with unknown classifications, choose the double hyphens (--) for the class.

## Applying Different Classifications to Fonts

The ability to apply and remove classifications is enabled by the administrator through a permission. (In general, the administrator should reserve the ability to apply classifications to users with backgrounds in typography.) The classification applies to the font itself — so each font displays the same classification in all sets and all workgroups. Since the classification can be used as search and smart set criteria, make sure the changes you make are appropriate for all users and workgroups.

**NOTE:** Changing a font's foundry does not affect the actual font; it is only for use within Universal Type Server.

To apply a different classification:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Classifications** from the drop-down menu.
3. In the **Fonts** pane, click to select a font or family (**View > Group Fonts by Family**).  
**NOTE:** To select multiple items, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous items, Shift+click the first and last item.
4. Check a classification to apply it to selected fonts.  
**NOTE:** An alert displays if you do not have the necessary permission to apply classifications.

## Reverting to the Default Classification

If you have permission to apply classifications to fonts, you can also revert fonts to their default classifications. Since classification can be used as search and smart set criteria, make sure reverting to the [default classifications](#) is appropriate for all users and workgroups.

To revert to the default classification:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Classifications** from the drop-down menu.
3. In the **Fonts** pane, click to select a font or family (**View > Group Fonts by Family**).  
**NOTE:** To select multiple items, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous items, Shift+click the first and last item.
4. Click the **Reset Attributes** button.  
**NOTE:** An alert displays if you do not have the necessary permission to reset a font's classification.

## Modifying Classifications

The ability to apply and remove classifications is enabled by the administrator through a permission. If you have this permission, you can create new classifications, edit custom classifications, and delete custom classifications. The default classifications cannot be modified. Changes to classifications are saved with Universal Type Server and affect all workgroups and all users.

## Creating Custom Classifications

If you need additional classifications to distinguish all your fonts, you can create an unlimited number of custom classifications.

To create a custom classification:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Classifications** from the drop-down menu.
3. Click the **Add Attributes** button.  
**NOTE:** An alert displays if you do not have the necessary permission to create classifications.
4. A new Untitled Classification is inserted alphabetically in the list. The classification is automatically highlighted so you can type a new name. The new classification displays alphabetically in the list and may be applied to fonts in any workgroup.

## Editing Custom Classifications

If you have permission to create and delete classifications, you can change the names of custom classifications. The default classifications cannot be edited. The changes apply to all the fonts with that custom classification applied. Be sure any changes you make to classifications are appropriate for all users and workgroups.

To edit a custom classification:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Classifications** from the drop-down menu.
3. Double-click a classification's name and type new text.  
**NOTE:** If you cannot click in a classification name, you do not have the necessary permission — or the classification is a default classification that cannot be modified.

## Deleting Custom Classifications

If you have permission to create and delete classifications, you can delete custom classifications. The default classifications cannot be deleted. When you delete a custom classification, fonts with that classification applied revert to the default classification. Be sure any deletions are appropriate for all users and workgroups.

To delete custom classifications:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Classifications** from the drop-down menu.
3. Click a classification's name to select it.  
**NOTE:** To select multiple items, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous items, Shift+click the first and last item.
4. Choose **Edit > Delete Attribute** (Mac) or **Edit > Delete** (Win) or press Delete.  
**NOTE:** If the **Delete Attribute** (Mac) or **Delete** (Win) command is gray, you do not have the necessary permission to delete classifications.

## Working with Foundries

In Universal Type Server, the foundry is the name of the company that licensed the font to your company. The foundry is not necessarily the original designer of the font. For example, if you license fonts from Adobe, the foundry is listed as Adobe — even though many fonts in the Adobe type library were created by other design houses.

When you add fonts, Universal Type Server attempts to identify the foundry. The foundry cannot always be determined and you may not always agree with it. You can work with foundries as follows:

- If you're looking for fonts from a specific vendor, you can sort fonts by foundry in the **Fonts** pane of the Universal Type Client.
- You can use the **Find** controls to list only fonts from specific foundries; this is especially helpful for applying license information to fonts.
- You can create smart sets to display an up-to-date list of all the fonts from specific foundries.
- Each font can have only one foundry applied to it.
- The foundry applies to the font itself — so the font displays the same foundry in all sets and all workgroups.
- If you have permission to create and delete foundries, you can add custom foundries (for example, you might create a foundry for fonts you modified).
- If you have permission to apply a foundry to a font, you can change the foundry and revert to the default foundry.
- Changing a font's foundry does not affect the actual font; it is only for use within Universal Type Server.

## Assigning Default Foundries

When fonts are added to Universal Type Server, they are automatically assigned a foundry. If Universal Type Server is unable to determine a font's foundry — as occasionally happens with shareware fonts, fonts from independent font designers, and fonts from smaller or newer font foundries — two hyphens display in the **Foundry** column.

## Sorting Fonts by Foundry

By default, the Fonts pane includes a **Foundry** column that shows the foundry applied to each font. If you do not have a **Foundry** column, choose **View > Columns > Foundry**, or Control+click (Mac) or Right+click (Win) a column heading and choose **Foundry**. Click the **Foundry** column's heading to sort fonts in the workgroup by foundry.

**NOTE:** To rearrange columns in the Fonts pane, click and drag the column headings.

## Finding Fonts by Foundry

To find fonts in the current workgroup with specific foundries, choose **Edit > Find Fonts**, or press Command+F (Mac) or Ctrl+F (Win). Use the Find controls to display the fonts that match any combination of foundries. If you need to find fonts from specific foundries often, click the Save button to save the find criteria as a smart set. The name is automatically highlighted so you can type a new name.

**NOTE:** To search for fonts with unknown foundries, choose the double hyphens (--) for the foundry.

## Applying Different Foundries to Fonts

The ability to apply and remove foundries is enabled by the administrator through a permission. The foundry applies to the font itself — so the font displays the same foundry in all sets and all workgroups. Since the foundry can be used as search and smart set criteria, make sure the changes you make are appropriate for all users and workgroups.

**NOTE:** Applying a different foundry to a font will change the font's family as well (**View > Group Fonts by Family**). In order for fonts to be listed in the same family, they need to have the same foundry. Changing a font's foundry does not affect the actual font files; the new foundry information is used only with Universal Type Server.

To apply a different foundry:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Foundries** from the drop-down menu.
3. In the **Fonts** pane, click to select a font or family (**View > Group Fonts by Family**).  
**NOTE:** To select multiple items, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous items, Shift+click the first and last item.
4. Check a foundry to apply it to selected fonts. Note: An alert displays if you do not have the necessary permission to apply foundries to fonts.  
**NOTE:** If you want to apply a foundry to a collection of fonts immediately after adding them, add the fonts as a set. Select all the fonts in the set and then apply the foundry. You can then delete the set if you want. (The fonts remain in the workgroup and retain the new foundry, even if you delete their set.)

## Reverting to the Default Foundry

If you have permission to apply foundries to fonts, you can also revert fonts to their [default foundries](#). Since the foundry can be used as search and smart set criteria, make sure reverting to the default foundry is appropriate for all users and workgroups.

To revert to the default foundry:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Foundries** from the drop-down menu.
3. In the **Fonts** pane, click to select a font or family (**View > Group Fonts by Family**).  
**NOTE:** To select multiple items, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous items, Shift+click the first and last item.
4. Click the **Reset Attributes** button.  
**NOTE:** An alert displays if you do not have the necessary permission to revert fonts to their default foundries.

## Modifying Foundries

The ability to create and delete foundries is enabled by the administrator through a permission. If you have this permission, you can create new foundries, edit custom foundries, and delete custom foundries. The default foundries cannot be modified. Changes to foundries are saved with Universal Type Server and affect all workgroups and all users.

## Creating Custom Foundries

If you need additional foundries to distinguish all your fonts, you can create an unlimited number of new foundries.

To create a custom foundry:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Foundries** from the drop-down menu.
3. Click the **Add Attributes** button.  
**NOTE:** An alert displays if you do not have the necessary permission to create foundries.
4. A new Untitled Foundry is inserted alphabetically in the list. The foundry is automatically highlighted so you can type a new name.  
The new foundry displays alphabetically in the list and may be applied to fonts in any workgroup.

## Editing Custom Foundries

If you have permission to create and delete foundries, you can change the names of custom foundries. The default foundries cannot be edited. The changes apply to all the fonts with that custom foundry applied. Be sure any changes you make to foundries are appropriate for all users and workgroups.

To edit a custom foundry:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Foundries** from the drop-down menu.
3. Double-click a custom foundry's name and type new text.  
**NOTE:** If you cannot click in a custom foundry name, you do not have the necessary permission to edit foundries — or the foundry is a default foundry that cannot be modified.

## Deleting Custom Foundries

If you have the necessary permission, you can delete custom foundries. The default foundries cannot be deleted. When you delete a custom foundry, fonts with that foundry applied revert to the default foundry. Be sure any deletions are appropriate for all users and workgroups.

To delete custom foundries:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Foundries** from the drop-down menu.
3. Click a foundry's name to select it.  
**NOTE:** To select multiple items, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous items, Shift+click the first and last item.
4. Choose **Edit > Delete Attribute** (Mac) or **Edit > Delete** (Win) or press Delete.  
**NOTE:** If the **Delete Attribute** (Mac) or **Delete** (Win) command is gray, you do not have the necessary permission to delete classifications.

## Working with Keywords

Along with all of the information recorded with fonts when they are added to Universal Type Server — such as type, foundry, class, and version — you can tag fonts with additional information related to the project, client, or other criteria. These tags are called keywords, and they are helpful for locating specific fonts.

The **Attributes** pane in the Universal Type Client contains the **Keywords** controls.

You can work with keywords as follows:

- You can see the keywords applied to selected fonts in the **Attributes** pane.
- You can use the **Find** controls to list only fonts with certain keywords.
- If you have permission to create and delete keywords, you can modify the list of keywords.
- If you have permission to apply keywords, you can apply keywords to fonts and remove keywords from fonts.
- Fonts can have multiple keywords.
- Keywords apply to the font itself — so the font displays the same keywords in all sets and all workgroups.
- You can create smart sets to display an up-to-date list of all the fonts that match specific keywords.

## Developing a Keyword Strategy

To use keywords effectively, you need to first determine the best way to use them in your environment. An ad agency, for example, might use client names and job numbers. A magazine publisher might use issue numbers or article names, and a book publisher might use ISBN numbers. Depending on the environment, you might use a combination of strategies. Keep in mind that the Universal Type Client already lets you sort and search on criteria such as type, foundry, and class, so there is no need to use that type of information in keywords.

Other issues with using keywords include:

- Who is responsible for applying keywords? (These users must have permission to apply keywords.)
- When are keywords applied? When fonts are added to a workgroup? Or when you start using them for a project?
- Who will create and maintain the list of keywords? (These users must have permission to create and delete keywords.)
- What are your naming conventions for keywords? Include standards for capitalizing and abbreviating keywords.
- Who is responsible for removing keywords from fonts and when will they do it?

If multiple users have permission to apply/remove keywords and create/delete keywords, you may wish to meet before you start using keywords. Deciding how keywords best suit your needs, what type of keywords to use, and who is responsible for maintaining them, will prevent confusion and ease your workflow.

Take a look at keywords in a book-publishing environment:

- The book publisher has four workgroups: Text Books, Computer Books, Training Manuals, and Reprints.
- Within each workgroup, there is a shared set for each different template. Depending on the needs of each book, the designer may use additional fonts.
- Once a book's designer determines all the fonts used in a book, he or she creates a keyword indicating the book's ISBN number and applies it to the fonts.

- Since the ISBN number is exclusive to each book, anyone working on the book can locate the correct fonts through the keyword, even if sets are not maintained for each book.
- Once a book is printed, the production person can locate all its fonts and move them to the Reprints workgroup.

In this scenario, many of the fonts will have multiple keywords, which is fine.

## Viewing Keywords

All users can see the keywords applied to fonts in the **Attributes** pane. You might, for example, look at a font's keywords to make sure the font you are activating was supplied by the correct client.

To view keywords:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Keywords** from the drop-down menu.
3. Click to select a font in the **Fonts** pane. The keywords applied to the font are checked.

**NOTE:** If you select multiple fonts, including families, in the Fonts pane, the keywords applied to all of the selected fonts are checked. A hyphen in a check box indicates that the keyword is applied to some, but not all, of the selected fonts.

## Finding Fonts by Keywords

To find fonts in the current workgroup with specific keywords, choose **Edit > Find Fonts**, or press Command+F (Mac) or Ctrl+F (Win). Use the **Find** controls to display the fonts that match any combination of keywords. If you need to find fonts using specific keywords often, click the Save button to save the find criteria as a smart set. The name is automatically highlighted so you can type a new name.

## Applying and Removing Keywords

The ability to apply and remove keywords is enabled by the administrator through a permission. Keywords apply to the font itself — so the font displays the same keywords in all sets and all workgroups. Since keywords can be used as search criteria and smart set criteria, make sure the changes you make are appropriate.

Fonts can have as many keywords as necessary to distinguish them from other fonts. For example, a font may have three keywords to indicate the client name, job name, and project manager that the font goes with. When a keyword is no longer appropriate for a font — for example, if you've finished the project the keyword is indicating — you can remove the keyword from the font. Fonts do not need to have keywords, so you can remove some or all of the keywords from a font.

To apply or remove keywords:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Keywords** from the drop-down menu.
3. In the Fonts pane, click to select a font or family (**View > Group Fonts by Family**).  
**NOTE:** To select multiple items, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous items, Shift+click the first and last item.
4. Check a keyword to apply it to selected fonts. Uncheck a keyword to remove it.  
**NOTE:** An alert displays if you do not have the necessary permission to apply keywords to fonts.

**NOTE:** If you want to apply keywords to a collection of fonts immediately after adding them, add the fonts as a set. Select all the fonts in the set and then apply the keywords. You can then delete the set if you want. (The fonts remain in the workgroup and retain their keywords, even if you delete their set.)

## Modifying Keywords

The ability to create and delete keywords is enabled by the administrator through a permission. If you have this permission, you can also edit the text of keywords. Changes to keywords are saved with Universal Type Server and affect all workgroups and all users.

## Creating Keywords

To start using keywords efficiently, it helps to first create a list of keywords. You can then add more keywords as necessary.

To create a keyword:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Keywords** from the drop-down menu.
3. Click the **Add Attributes** button.  
**NOTE:** An alert displays if you do not have the necessary permission to create keywords.
4. A new Untitled Keyword is inserted alphabetically in the list. The keyword is automatically highlighted so you can type a new name (such as a client name or job number). The new keyword displays alphabetically in the list and may be applied to fonts in any workgroup.

## Editing Keywords

If you have permission to create and delete keywords, you can change the text of a keyword as well. Be sure any changes you make to keywords are appropriate for all users and workgroups.

To edit a keyword:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Keywords** from the drop-down menu.
3. Double-click a keyword's name and type new text.  
**NOTE:** If you cannot click in a keyword name, you do not have the necessary permission to edit keywords.

## Deleting Keywords

If you have the necessary permission, you can delete keywords. Deleted keywords are automatically removed from all the fonts to which they were applied. Be sure any deletions are appropriate for all users and workgroups.

To delete keywords:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Keywords** from the drop-down menu.
3. Click a keyword's name to select it.  
**NOTE:** To select multiple items, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous items, Shift+click the first and last item.
4. Choose **Edit > Delete Attribute** (Mac) or **Edit > Delete** (Win) or press Delete.  
**NOTE:** If the **Delete Attribute** (Mac) or **Delete** (Win) command is gray, you do not have the necessary permission to delete classifications.

## Working with Licenses

Universal Type Server lets you tag fonts with descriptions of their respective license agreements. By default, fonts are considered to have no license. You can work with licenses as follows:

- You can see the licenses applied to selected fonts in the **Attributes** pane.
- You can use the **Find** controls to locate licensed and unlicensed fonts.
- You can create smart sets to display an up-to-date list of all the fonts that are licensed or unlicensed.
- Fonts can have multiple licenses.
- Licenses apply to the font itself — so the font displays the same licenses in all sets and all workgroups.
- If you have permission to create and delete licenses, you can modify the list of licenses.
- If you have permission to apply licenses, you can apply licenses to fonts and remove licenses from fonts.

## Developing a Licensing Strategy

To use licenses effectively, you will need to locate all your paperwork, determine which fonts they apply to, create license agreement descriptions, and apply the licenses to fonts. To make sure this happens consistently, consider the following:

- Standard naming conventions for licenses. If you have three different types of licenses from Adobe, you need to be able to distinguish them from each other.
- Standard use of the **Notes** field, which lets you store additional information with licenses. You might use the **Notes** field to indicate which department licensed the font, where the physical paperwork is, etc.
- Who will create the licenses, who will apply them to fonts, and when will they do this?
- How do you intend to handle unlicensed fonts and who is responsible for this?

## Viewing Licenses

In the **Fonts** pane, the **Licensed** column (**View > Columns > Licensed**) lists Yes for families and fonts to which a license is applied. All users can see the specific licenses applied to fonts in the **Attributes** pane.

To view licenses:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Licenses** from the drop-down menu.
3. Click to select a font in the **Fonts** pane. The licenses applied to the font are checked.  
**NOTE:** If you select multiple fonts, including families, in the **Fonts** pane, the licenses applied to all of the selected fonts are checked. A hyphen in a check box indicates that the license is applied to some, but not all, of the selected fonts.

## Finding Licensed or Unlicensed Fonts

To list licensed or unlicensed fonts in the current workgroup, choose **Edit > Find Fonts**, or press Command+F (Mac) or Ctrl+F (Win). Choose **Licenses** for the criteria, then select **font has license(s) or no licenses assigned**.

If you need to find licensed or unlicensed fonts often, click the Save button to save your find criteria as a smart set. The smart set is automatically highlighted so you can type a new name.

## Applying and Removing Licenses

The ability to apply and remove licenses is enabled by the administrator through a permission. Licenses apply to the font itself — so the font displays the same licenses in all sets and all workgroups. Since whether or not a font is licensed can be used as search criteria and smart set criteria, make sure the changes you make are appropriate for all users and workgroups.

Fonts can have multiple licenses, which is handy if you purchase multiple seats for a font library at different times. The license features help ensure compliance with font licenses, but you do not need to assign license information to fonts in order to use them.

To apply or remove licenses:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Licenses** from the drop-down menu.
3. In the **Fonts** pane, click to select a font or family (**View > Group Fonts by Family**).  
**NOTE:** To select multiple items, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous items, Shift+click the first and last item.
4. Check a license to apply it to selected fonts. Uncheck a license to remove it.  
**NOTE:** An alert displays if you do not have the necessary user permission.

**NOTE:** If you want to apply a license to a collection of fonts immediately after adding them, add the fonts as a set. Select all the fonts in the set and then apply the license. You can then delete the set if you want. (The fonts remain in the workgroup and retain the license information, even if you delete their set.)

## Managing Licenses

The ability to create and delete licenses is enabled by the administrator through a permission. If you have this permission, you can also edit the names and details of licenses. For example, if you renew a font license you can update the **Expiration Date**; if you expand a font license, you can modify the **Number of Seats**. Changes to licenses are saved with Universal Type Server and affect all workgroups and all users.

## Creating Licenses

To get started using licenses, you need to create a list of the font licenses you have. You can then add licenses as necessary when you acquire and add new fonts.

To create a license:

1. In the Universal Type Client, choose **Window > Licenses** (Mac) or **Tools > Licenses** (Win).  
**NOTE:** If this command is gray, you do not have the necessary permission to create licenses.
2. Click the **Add (+)** button in the lower-left corner.
3. Enter a name in the **License Name** field at right.

- Fill in any details such as **Vendor**, **Number of Seats**, **PO/ Order Number**, **Expiration Date**, and more.

- Click **Apply** to save changes to the new license.
- Repeat steps 2–5 to create additional licenses.
- When you're finished creating licenses, click **Close** (Win) or close the dialog box (Mac).

New licenses display alphabetically in the **Attributes** pane's **Licenses** list and may be applied to fonts in any workgroup.

## Editing Licenses

If you have permission to create and delete licenses, you can change the name of a license and all its details as well. Be sure any changes you make to licenses are appropriate for all users and workgroups.

To edit a license:

- In the Universal Type Client, choose **Window > Licenses** (Mac) or **Tools > Licenses** (Win). **NOTE:** If this command is gray, you do not have the necessary permission to edit licenses.
- Select a license in the **Licenses** list at left.
- Change any details at right.
- Click **Apply** to save changes to the selected license.
- Repeat steps 2–4 to edit additional licenses.
- When you're finished editing licenses, click **Close** (Win) or close the dialog box (Mac).

## Deleting Licenses

If you have the necessary permission, you can delete licenses. Deleted licenses are automatically removed from all fonts to which they were applied. Be sure any deletions are appropriate for all users and workgroups.

To delete a license:

1. In the Universal Type Client, choose **Window > Licenses** (Mac) or **Tools > Licenses** (Win).  
**NOTE:** If this command is gray, you do not have the necessary permission to delete licenses.
2. Select a license in the **Licenses** list at left.
3. Click the **Delete (-)** button in the lower-left corner.
4. When the alert displays, click **OK** to confirm the deletion.
5. When you're finished deleting licenses, click **Close** (Win) or close the dialog box (Mac).

## Working with Styles

- You can use the **Find** controls to list only fonts from specific styles.
- You can create smart sets to display an up-to-date list of all the fonts in specific styles.

Many typefaces contain a variety of styles — Bold, Black, Heavy, Italic, Oblique, Bold Italic, etc. When you add fonts, Universal Type server attempts to identify each font's style (generally, by the font's name). You can then use the style as search criteria. Since you may not agree with the style applied to each font, you can change a font's style and create new styles. You can work with styles as follows:

- Fonts can have multiple styles.
- The styles apply to the font itself — so the font displays the same styles in all sets and all workgroups.
- If you have permission to create and delete styles, you can add custom styles.
- If you have permission to apply styles to fonts, you can change the styles and revert to the default style.

## Finding Fonts by Style

To find fonts in the current workgroup with specific styles, choose **Edit > Find Fonts**, or press Command+F (Mac) or Ctrl+F (Win). Use the **Find** controls to display the fonts that match any combination of styles.

If you search for the same combination of styles often, click the Save button to save your find criteria as a smart set. The name is automatically highlighted so you can type a new name.

## Applying Different Styles to Fonts

The ability to apply and remove styles is enabled by the administrator through a permission. The styles apply to the font itself — so the font displays the same styles in all sets and all workgroups. Since styles can be used as search and smart set criteria, make sure the changes you make are appropriate for all users and workgroups.

NOTE: Changing a font's styles does not affect the actual font; it is only for use within Universal Type Server.

To apply a different style:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Styles** from the drop-down menu.
3. In the **Fonts** pane, click to select a font or family (**View > Group Fonts by Family**).  
**NOTE:** To select multiple items, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous items, Shift+click the first and last item.
4. Check a style to apply it to selected fonts.  
**NOTE:** An alert displays if you do not have the necessary permission to apply styles.

## Reverting to the Default Style

If you have permission to apply styles to fonts, you can also revert fonts to their default styles assigned by Universal Type Server. Since the style can be used as search and smart set criteria, make sure reverting to the default style is appropriate for all users and workgroups.

To revert to the default style:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Styles** from the drop-down menu.
3. In the **Fonts** pane, click to select a font or family (**View > Group Fonts by Family**).  
**NOTE:** To select multiple items, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous items, Shift+click the first and last item.
4. Click the **Reset Attributes** button.  
**NOTE:** An alert displays if you do not have the necessary permission to revert a font to its default styles.

## Modifying Styles

The ability to create and delete styles is enabled by the administrator through a permission. If you have this permission, you can create new styles, edit custom styles, and delete custom styles. The default styles cannot be modified. Changes to styles are saved with Universal Type Server and affect all workgroups and all users.

## Creating Custom Styles

If you need additional styles to distinguish all your fonts, you can create an unlimited number of new styles.

To create a custom style:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Styles** from the drop-down menu.
3. Click the **Add Attributes** button.  
**NOTE:** An alert displays if you do not have the necessary permission to create styles.
4. A new Untitled Style is inserted alphabetically in the list. The style is automatically highlighted so you can type a new name.  
The new style displays alphabetically in the list and may be applied to fonts in any workgroup.

## Editing Custom Styles

If you have permission to create and delete styles, you can change the names of custom styles. The default styles cannot be edited. The changes apply to all the fonts with that custom style applied. Be sure any changes you make to styles are appropriate for all users and workgroups.

To edit a custom style:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Styles** from the drop-down menu.
3. Double-click a style's name and type new text.  
**NOTE:** If you cannot click in a style name, you do not have the necessary permission — or the style is a default style that cannot be modified.

## Deleting Custom Styles

If you have the necessary permission, you can delete custom styles. The default styles cannot be deleted. When you delete a custom style, fonts with that style applied revert to the default styles. Be sure any deletions are appropriate for all users and workgroups.

To delete custom styles:

1. If necessary, click the **Attributes** button to display the **Attributes** pane in the Universal Type Client.
2. Choose **Styles** from the drop-down menu.
3. Click a style's name to select it.  
**NOTE:** To select multiple items, Command+click (Mac) or Ctrl+click (Win). To select a range of continuous items, Shift+click the first and last item.
4. Choose **Edit > Delete Attribute** (Mac) or **Edit > Delete** (Win) or press Delete.  
**NOTE:** If the **Delete Attribute** (Mac) or **Delete** (Win) command is gray, you do not have the necessary permission to delete classifications.

## About Extensis

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## Technical Support

Technical Support is available directly through the Extensis website or by telephone.

When contacting technical support, include the following information:

- Your serial number(s)
- Your computer configuration, including operating system, memory, hard drive configuration, etc.
- Your question or a description of the difficulty you're experiencing - what specifically occurs and when
- Your phone number if you want to have our representatives call you.

Take note of any error numbers or messages that display and any other information you think may be relevant.

For answers to frequently asked questions and troubleshooting tips, you can also visit the Extensis website: <http://www.extensis.com/typeserver/>

## Priority Support

If you have an Annual Service Agreement, you are entitled to priority support. Please call the telephone number listed on your agreement to receive support 24 hours a day.

## Online Support

To obtain support online, please fill out the online support form at

<http://www.extensis.com/support/>

Our tech support representatives will respond by phone or e-mail, usually within 24 hours on weekdays.

## Telephone Support

In North America, please call (503) 274-7030

In Europe, please call +44 (0) 1604-654-270 \_

## The fine print

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