



Extensis.

# Universal Type Server<sup>®</sup> 3

CORE CLIENT USER GUIDE



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Universal Type Server 3.0.1

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# Universal Type Server Core Client

## What is the Universal Type Core Client?

The Core Client is a scaled-down version of the full Universal Type Client designed for organizations that need to manage fonts across their company but don't require all of the functionality in the full client.

Editorial and non-creative users often require only a small set of the fonts for their everyday tasks. A full-featured client application is usually much more than these users need. The Universal Type Core Client doesn't have the user interface of the full client but still delivers strong protection from rogue font usage. It governs which licensed fonts can be activated, prevents illegal system font usage and reports font usage back to Universal Type Server for licenses being consumed.

### Core Client Key Advantages:

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

**NOTE:** The Core Client is only available as an add-on with the Enterprise edition.

When the Core Client starts, it automatically activates all fonts that are in Startup Sets. A Startup Set consists of fonts that a Universal Type Server administrator has determined that all users must have active at all times.

The Core Client will also enforce whatever system font policy is specified for the user. The administrator can designate which fonts are allowed in the user's system fonts, and if the user attempts to install other fonts they will be automatically removed.

## Preparing for the Core Client

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

1. License the Core Client.
2. Download the Core Client installers.
3. Confirm that user systems meet the Core Client system requirements.
4. Create Core Client user accounts in the User and Workgroups Management application.
5. Create Startup Sets.
6. Install the Core Client.
7. Create a configuration file.
8. Deploy the configuration file.

In order to license the Core Client, you will need to use the Universal Type Server Administration application.

In order to create user accounts, you will need to use the Users and Workgroups Management application. These applications are accessed from your Flash-enabled web browser.

In order to create Startup Sets, you will need to use the Universal Type Client application.

### **IMPORTANT**

The Universal Type Client and the Core Client perform many of the same functions behind the scenes and are not compatible. Do not install the Universal Type Client on a system where you will be installing the Core Client.

## Licensing the Core Client

The Core Client can be licensed for use with the Enterprise Edition of Universal Type Server. To enter a serial number for the Core Client:

1. Start your web browser and log in to the Server Administration application.
2. Click the **Licenses** link on the left.
3. Type or paste your Core Client serial number into the field labeled **Add Serial Number**, then click the **Add Serial Number** button.
4. Confirm that your license was added correctly, then click **Logout**.

If you would like to install the Core Client on a trial basis, please contact Extensis Corporate Sales for a trial serial number. See **Contacting Extensis** on page 9.

## Downloading the installers

You can download the Core Client installer from the Universal Type Server updates page on the Extensis website at <http://www.extensis.com/en/support/universal-type-server.jsp>. Be sure to download installers for the platforms you are supporting: Macintosh, Windows, or both.

## System requirements

The Core Client has the same system requirements as the Universal Type Client. The most up-to-date requirements can be found online at <http://www.extensis.com/en/font-management/universal-type-server-3/system-requirements.jsp>.

## User accounts

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

For details about adding network user accounts to your Type Server, see the **Directory Integration** section of the Universal Type Server User Management help system or User Guide.

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

### NOTE

The Core Client can be used with Directory Integration and Kerberos single-sign on to automatically connect the user to the correct Type Server without having to enter a password.

### To create a user account:

1. Start your web browser and log in to the User Management application.
2. Click **All Users** or choose a specific workgroup in the **Workgroups** list on the left.  
If you choose a specific workgroup, the user account will be added to that workgroup automatically.
3. Click the **[ + ] Add** button at the bottom of the **Users** list to add a new user.
4. In the user account pane on the right, enter the appropriate information in the **Account** panel.
5. In the **Settings** panel, only a few options are used for Core Client users:
  - Change Password:** Check this box to allow the Core Client user to change his password.
  - Time between server syncs:** The Core Client will “check in” with the Type Server at this interval and activate or deactivate fonts as needed.  
While the default value is 5 minutes, most Core Client users will not have frequent changes to their available fonts, so you can safely change this to a larger interval, or even Manual. (The Core Client will always synchronize with the Type Server when it establishes a connection, and the user can launch the Core Client and perform a manual sync at any time.)
  - Enforce System Font Policy:** Check this box to have the Core Client monitor the user’s system fonts and disallow removing required fonts or adding new fonts.
  - Disable Startup Sets:** Fonts in a user’s Startup Sets are automatically enabled when the Core Client connects to the Type Server. If you check this box, fonts in Startup Sets will not be enabled for the user. You might choose to disable Startup Sets but enforce a system font policy for users that do not need to use fonts other than those required by their operating system.

6. Click the **Save** button to save the user account.
7. Add the user to a workgroup by dragging his name from the **Users** list to the desired workgroup in the **Workgroups** list.

For details about user accounts and account settings, see the **Users** section of the Universal Type Server User Management help system or User Guide.

## Creating Startup Sets

The Core Client uses Startup Sets to determine what fonts to activate for Core Client users. In order to create Startup Sets, you must connect to your Type Server with Universal Type Client using an account that is either a Font Administrator or a Workgroup Administrator in the same workgroup as the Core Client user.

### To create a Startup Set:

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

For more information about sets, see the **Sets** section of the Type Client help system or User Guide.

## The configuration file

Rather than requiring the user to enter server information, the Core Client relies on a configuration file to supply the server connection information. This file must be present in order for the Core Client to connect to the server.

If your users will all connect to one Type Server, you can create one configuration file and deploy it to all users.

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

If you prefer a more robust editor, we recommend TextWrangler from Bare Bones Software for Macintosh (visit <http://www.barebones.com/products/textwrangler/>), and Notepad++ for Windows (available at <http://notepad-plus-plus.org>).

The configuration file consists of at least one or two lines that identify the server to the Core Client. You can specify the server by address and port, or using its Bonjour name. (See the **Server Status** section in the Server Administration help system or user guide for information on setting the server's Bonjour name.)

### Example: IP address and port

```
server.address=12.34.56.78
server.port=8080
```

### Example: DNS name and port

```
server.address=example.com
server.port=8080
```

### Example: Bonjour name

```
server.bonjour=Universal Type Server
```

### NOTES

- If you include the `server.address` parameter, you must include the `server.port` parameter.
- If you include the `server.port` parameter, you must also include the `server.address` parameter.
- If you include both `server.address` and `server.bonjour`, the Bonjour name will be used to make the connection.
- The default port for Core Client communication is 8080.

## Saving in UTF-8 format

The configuration file needs to be named `com.extensis.TypeServerCoreClient.conf`. You can either save your file with this name or rename it when you have finished. If your text editor appends a `.txt` or other extension, be sure to remove it before deploying the file. (In Windows, you may need to disable **Hide extensions for known file types** in the View panel of the Folder Options control panel.)

- In TextEdit on OS X, choose **Format > Make Plain Text** to convert your file to plain text, choose **File > Save**, then choose **Unicode (UTF-8)** from the **Plain Text Encoding** pop-up menu.
- In Notepad on Windows, choose **File > Save**, then choose **ANSI** from the **Encoding** pop-up menu. (Do not use Notepad's UTF-8 format; this adds a byte order marker which is not recognized by the Core Client.)
- In WordPad on Windows, choose **File > Save**, then choose **Text Document - MS-DOS Format (\*.txt)** from the **Save as type** pop-up menu.
- In TextWrangler on OS X, choose **File > Save**, then choose **Unicode (UTF-8)** from the **Encoding** pop-up menu.
- In Notepad++ on Windows, choose **Encoding > Encode in UTF-8 without BOM** before saving the configuration file.

## Installing the Core Client

The Core Client installer is fairly straightforward. Copy the installer to the client computer, or use a copy on a CD or thumb drive.

**TIP:** If you copy the installer to a thumb drive, you can also copy the configuration file to the drive and deploy it immediately after installation is complete.

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

If you have copied the installer to the client computer, be sure to remove it when you have completed the installation.

## Deploying the configuration file

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

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

## Using the Core Client

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

### Logging in

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

If Directory Integration with Kerberos Authentication is configured on your Type Server, the user will be automatically logged in to the Type Server and will not see the connection window. See the section on Directory Integration in the User Management help system or User Guide.

**If you need to start the Core Client manually:**

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

## Manual synchronization

Core Client users are automatically synchronized with your Type Server based on the **Time between server syncs** specified for their account. Synchronization retrieves fonts in the user's Startup Sets and applies the System Font Policy.

Users can also manually synchronize fonts at any time.

### To manually synchronize fonts:

1. Start the Core Client.
2. Click the **Sync** button.

To force the Core Client to re-download all fonts and settings instead of just new fonts and changes, hold down the **OPTION** key (Macintosh) or **SHIFT** key (Windows), then click **Sync**.

## Uninstalling the Core Client

### Macintosh

1. Quit the Core Client if it is running.
2. Open the **Accounts** system preferences panel.
3. Click the lock icon and enter your password to authenticate.
4. Click the **Login Items** tab.
5. Select the **Type Server Core Client** in the list of items and click the [ — ] button.
6. Quit System Preferences.
7. Delete the file Type Server Core Client in the Applications folder.
8. Delete the Core Client folder located in \Library\Application Support\Extensis\  
Enter your password when you are prompted to authenticate.
9. Restart your computer, then empty the Trash.

### Windows

1. Quit the Core Client if it is running.
2. Open the **Programs and Features** control panel (Windows 7/Vista) or **Add or Remove Programs** (Windows XP).
3. Choose **Extensis Universal Type Core Client**.
4. Click **Uninstall** (Windows 7/Vista) or **Remove** (Windows XP).
5. Follow the prompts to uninstall.
6. Restart your computer.

# Contacting Extensis

## Extensis

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## Customer Service

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## Celartem, Inc.

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**Web:** <http://en.celartem.com>

## Documentation Feedback

**Web:** <http://www.extensis.com/helpfeedback/>

## Corporate Sales

**Web:** <http://www.extensis.com/corporatesales/>  
**Phone:** (800) 796-9798, ask for Corporate Sales

## Technical Support

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

**Web:** Fill out the form at <http://www.extensis.com/support/>.

A support representative will respond by phone or email, usually within 24 hours on weekdays.

**Phone:** Please call (503) 274-7030 in North America, or +44 (0) 1604 654 270 in Europe.

When contacting technical support, please include the following information:

- Your product name and serial number(s);
- Your computer configuration, including operating system, memory, and hard drive configuration;
- Your question, or a description of the difficulty you're experiencing: what specifically occurs and when;
- Your phone number if you want to have a representative 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 at <http://www.extensis.com/>.

### 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.