



upgrading from
Font Reserve Server

Universal Type Server™

The Evolution of Suitcase™ and Font Reserve™



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Upgrading from Font Reserve Server

Congratulations on your purchase of Universal Type Server™ font management software.

This covers the main conceptual differences between Extensis Font Reserve Server and Universal Type Server from an administrator's perspective. We are confident that users will find the Universal Type Client™ both intuitive and easy to use. To quickly get users up to speed, it is recommended that each client user read the Universal Type Client Quick Reference. This short document covers the basic Type Client functions.

The following information will help you leverage your past server administration experience by applying what you already know to the administration of Universal Type Server™. This covers the conceptual differences between the two applications, as well as instructions that will help you preserve much of your users, fonts and other information.

For complete information about the installation and configuration of Universal Type Server, see the Server Administration User and the Users and Workgroups Administration Guides and webhelp.

Quick reference chart

If all you need to know is where to go in Universal Type Server to accomplish a familiar task, consult this chart.

Task	Font Reserve Server	Universal Type Server
Enter default administrator username and password	Default username: admin Default password: admin	Default username: administrator Default password: password
Start, stop, pause the server	Server Manager	Server Administration web interface
Change the server's Bonjour name	n/a	Server Administration web interface
Change port settings	Server Manager	Server Administration web interface
View connected clients	Server Manager	Server Administration web interface
Backups (configure, restore)	Server Manager	Server Administration web interface
Datastores (locate, move, create)	Server Manager	Server Administration web interface
Users (create, modify, assign permissions, delete)	Client Admin menu, with administrator login	Users and Workgroups Administration web interface
Workgroups (create, modify, delete)	Client Admin menu, with administrator login	Server Administration web interface
Adding fonts	Client into a workgroup with Add permission, or by a workgroup administrator	Type Client by a user with Add and Remove permission
Delete fonts from all workgroups	Client into Administrative Workgroup with administrator permission	Type Client into All Fonts workgroup by user with Full Administrator permission

Web-based administration tools

With Universal Type Server's web-based tools, you can administer the server from a web browser on any computer, anywhere. Server administration is performed through two web-based interfaces: the Server Administration web interface and the Users and Workgroups Administration web interface.

Unlike with Font Reserve Server, you can have more than one user perform most administrative functions: The Server Administrator Super-user (probably you) and users whom you give the Full Administrator permission.

Server Administration web interface

In the Server Administration web interface, you can manage the server, view connected clients, configure backups, and more. Through this interface administrators have a fine level of control over many administrative tasks. Some of these features include:

- Automated backup scheduling
- Custom Bonjour naming
- Viewing and forcing logoff of connected clients
- Starting and stopping the server remotely

To login using a supported browser:

1. Enter your server IP address followed by a colon and the port number.
The default server administration port is 8081 (also called the JBoss HTTP / Web Service port).
Example: `http://198.1.2.32:8081` or `http://localhost:8081`
2. The default Server Administrator Super-user username and password are **administrator** and **password**.

Users and Workgroups Administration Web Interface

In the Users and Workgroups Administration web interface, administrators can manage users, workgroups, roles and permissions. Some of the tasks performed here include:

- Creating workgroups
- Creating users and adding them to workgroups
- Setting user permissions

To login using a supported browser:

1. In the location bar, enter your server IP address followed by a colon and the port number.
The default Users and Workgroups Administration port is 8080 (also called the Jetty Web App port).
Example: `http://10.1.2.32:8080` (or `http://localhost:8080` if administering the server locally).
2. The default System Administrator Super-user username and password are **administrator** and **password**.

Command line tools

In addition to the administration web interfaces, many of the server administration functions can be performed through the use of command line tools. These tools can be helpful if certain administration functions are performed regularly, and would benefit from scripted automation. All command line functions are fully documented and include all parameters available to administrators.

Cross-platform clients

Universal Type Server includes Universal Type Client™ software for both Mac OS and Windows. As many users as necessary can install the Type Client since your license continues to control only the number of users connected at one time.

With the cross-platform capabilities of Universal Type Server, this may be a good opportunity to switch to all cross-platform fonts—aka, OpenType fonts. Otherwise, you need to plan to add fonts to workgroups from the appropriate platform. Fonts that are not compatible with the client's operating system are displayed in the Universal Type Client's fonts pane, but are not available for activation or use in documents.

Consider using only OpenType fonts

Universal Type Server includes Universal Type Client™ software for both Mac OS and Windows. As many users as necessary can install the Type Client since your license continues to control only the number of users connected at one time. With the cross-platform capabilities of Universal Type Server, this may be a good opportunity to switch to all cross-platform fonts—aka, OpenType fonts. Otherwise, you need to plan to add fonts to workgroups from the appropriate platform. Fonts that are not compatible with the client's operating system are displayed in the Universal Type Client's fonts pane, but are not available for activation or use in documents.

Plan to add fonts from the appropriate platform

The Universal Type Client requires that Mac-only fonts be added from a Mac and Windows-only fonts be added from a Windows system. So, for example, you need to add PostScript fonts for specific platforms from that operating system. Since font corruption checking happens at the client level as you are adding fonts, if you attempt to add font files that are not compatible with the current client OS, the font is considered not compatible and is ignored.

NOTE: If you cannot control the file format of incoming fonts, be sure that at least one user on both platforms has permission to add fonts.

New permissions structure

In Font Reserve Server, workgroup permissions—not user permissions—controlled what users could do with fonts, including add, activate, delete, and export. User permissions controlled whether users could edit font information, such as class and license, along with tasks such as modifying the keyword list and sharing sets. This required administrators to carefully think about which fonts were in each workgroup and which users belonged to those workgroups. For example, if you wanted all but one user to be able to export fonts, you'd have to create a separate workgroup—without export permission—for that user. In addition, this setup required the administrator to set user permissions for each and every user—there were no default permissions.

Universal Type Server's permissions structure eases the process of setting up users and workgroups and provides more granular control. The primary differences are:

- **User-Based Add, Delete, Export:** The ability to add, delete, and collect fonts can now be controlled on a user-by-user basis along with the ability to edit font information.
- **Roles for Easy Setup:** Roles function like style sheets for users, allowing you to quickly and consistently set up multiple users. In addition, like style sheets, changes to roles dynamically update users assigned to that role. Universal Type Server comes with a variety of roles, you can create your own roles, and you can override a role's settings on a user-by-user basis. Workgroups have a default role so you can add users to a workgroup without setting up their individual permissions.
- **User Permissions Can Vary by Workgroup:** You can give users different roles, permissions, and settings in different workgroups. As a result, users may not be able to perform the same activities in each workgroup to which they belong.

You do still have the option to make users a workgroup administrator—called Font Administrator in Universal Type Server—so certain users can perform all font-management tasks. The Font Administrator status does not have to apply to all workgroups to which the user belongs—so a user might be a Font Administrator in one workgroup and not in another.

No activate permission

In Font Reserve Server, users could browse fonts without actually having permission to activate them. In Universal Type Server, all users can activate fonts. (Keep in mind that when a font is activated, it may be using one of the "seats" specified in the font's license.)

Comparing user settings and permissions

The Users and Workgroups Administration web interface allows you to create users and specify a role or individual settings and permissions. Permissions from Font Reserve Server roughly map to settings within the user roles and to individual user settings and permissions. Note that the permissions may not function exactly the same way—for example, full administrators in Universal Type Server have more power than workgroup administrators in Font Reserve Server.

Font Reserve Server User Permission	Universal Type Server Permission	Universal Type Server Location
Name	Account name	Account tab
Full Name	Full name	Account tab
Password	Password	Workgroups tab
Is workgroup administrator	Is Font Administrator	Settings tab
Has personal workgroup	Has Personal Workgroup	Settings tab
Change own password	Change Password	Settings tab
Activate from all workgroups	Activate Fonts Across Workgroups	Settings tab
Share sets	Create and Delete: Shared Sets	Workgroups tab
Modify shared sets	Modify Shared Sets	Workgroups tab
Apply class to font	Apply to Fonts: Styles, Classifications, Foundries, and Families	Global tab
Modify class list	Apply to Fonts: Styles, Classifications, Foundries, and Families	Global tab
Apply foundry to font	Apply to Fonts: Styles, Classifications, Foundries, and Families	Global tab
Modify foundry list Apply to Fonts: Font Attributes Global tab	Apply to Fonts: Styles, Classifications, Foundries, and Families	Global tab
Apply keywords to font	Apply to Fonts: Keywords	Global tab
Modify keyword list	Create and Delete: Keywords Global tab	Global tab
Apply licenses to font	Apply to Fonts: Licenses	Global tab
Modify license list	Create and Delete: Licenses	Global tab
Use "Find" menu	n/a All users have access to Find controls.	Universal Type Client
Modify custom find list	n/a All users can create Smart Sets rather than save find criteria.	Universal Type Client
Workgroups	Workgroups tab	Workgroups tab

Workgroup Permissions

In addition to working with users and roles, you will use the Users and Workgroups Administration web interface [link to above] to create workgroups. Most of the permissions set for workgroups in Font Reserve Server, however, are now user-based permissions, offering greater control and flexibility.

Font Reserve Server Workgroup Permission	Universal Type Server Permission	Universal Type Server Location
Name	Workgroup name	New Workgroup tab
Add	Add and Remove Fonts	Workgroups tab for user
Delete	Add and Remove Fonts	Workgroups tab for user
Activate	n/a All users can activate fonts.	Universal Type Client
Export	Collect Fonts for Output	Workgroups tab for user

New Font Delivery Options Improve Working Offline

In Font Reserve Server, fonts were delivered to all users “on demand”—when a user activated a font, it was downloaded to his or her computer from the server, cached, then activated through the local system.

When Font Reserve Server users worked offline, they only had access to fonts that were active before they disconnected and fonts in their cache. Since the cache consisted of only fonts the user had activated at some point, they might have fairly limited font access while working offline. Universal Type Server offers font delivery options that improve the experience of working offline.

The administrator can decide how each user’s fonts are delivered—referred to as the “font replication mode”—to best suit each user’s needs.

Font Replication Mode	Description	Usage
All	This replication mode automatically downloads all fonts from the workgroups to which the user is a member. While working offline, the user has access to all the fonts in his or her workgroups.	This is a good setting for users who will frequently be working offline, and who need access to a wide variety of fonts.
On-Demand	This mode downloads fonts as requested for previewing, activating, or exporting. When fonts are no longer required, they are removed and are not stored in the Type Client font cache. Only fonts that are currently active or being previewed are available while working offline.	Users are restricted from working with fonts while offline. When connected to the server, fonts are downloaded when needed then removed when deactivated
On-Demand Local Cache	This replication mode downloads fonts as requested for previewing, activating, and exporting. After being downloaded from the server, fonts are not removed and remain in the Type Client cache. Cached fonts (and active fonts) are available for activation, preview and export while working offline.	This method is similar to Font Reserve Server’s method.

Additional New Items

The following additional improvements are also included in Universal Type Server.

Regrouping Families

In Font Reserve Server, only the administrator could group fonts into different families. In Universal Type Server, any users with the ability to modify font attributes (**Global tab > Apply to Fonts: Font Attributes**) can drag fonts into different families in the Universal Type Client. If you have already regrouped many fonts into different families, you may want to export those fonts from the Font Reserve Browser as sets, then add them as sets to Universal Type Server. This will preserve your grouping until you regroup the families in Universal Type Server.

Server Based and Client Based Personal Workgroups

All personal workgroups in Font Reserve Server were stored on the server. In Universal Type Server, you can specify where the personal workgroup is stored for each user who has one (**Settings tab > Has Personal Workgroup: Server based or Client based**). If the personal workgroup is stored on the server, the user can access his or her personal workgroup from any computer and those fonts will be regularly backed-up with the server. Client based personal workgroups reside on the user's system and are not backed-up with the server.

The Universal Type Core

Like the Font Reserve Server client's Font Reserve Proxy, the Universal Type Client relies upon a background application called the Universal Type Core to keep fonts active. Your users will be able to quit the Type Client, and fonts that are activated will stay active. If you user opens a document that requires inactive fonts, the auto-activation plug-ins communicate directly with the Type Core and activate the required fonts. The Type Core can be started and stopped using either the Mac OS system preferences or the Windows control panel.

Networking Requirements

The Universal Type Server requires a number of open ports for both internal server communication and client connection. Most importantly, to connect to the Server Administration web interface, port 8081 must be open, and to use the Users and Workgroups Administration web interface, port 8080 must be open. These ports can be changed as required using the Server Administration web interface.

As an additional benefit, Type Server uses the Apple Bonjour technology to support network discovery of font servers. This way, even if your users forget the server address, they will be able to browse servers on the network to quickly find the location of your server.

Auto-activation plug-ins

The Universal Type Client auto-activation plug-ins are very similar to the Font Reserve Server plug-ins with two important differences.

- The new plug-ins allow you to go offline without using the Universal Type Client to do so
- If you open a document that uses the plug-ins and you are not currently logged in to the server, the plug-ins will allow you to login directly without needing to launch the Type Client.

Font Reserve Server Migration Process

If you have a previous installation of Font Reserve Server, you may want to use the Font Reserve Migration Tool to help move your data from your previous server into Universal Type Server.

Configuring Type Server from scratch

While Extensis provides the migration tool for your convenience, this may be a good time for you to reexamine your font management requirements, and configure Universal Type Server to most accurately meet your needs. There are several differences between Font Reserve Server and Universal Type Server that could affect your configuration decisions. Most of the changes are covered in this document. We recommend that you read the Type Server documentation for complete configuration and setup instructions.

Backup any current installation

Before starting the migration process, back up your Font Reserve database as well as any previously configured Universal Type Server database.

If you have already installed and configured Universal Type Server, **it is important to understand that all current users, workgroups, fonts and roles are replaced with new data during the migration process.** If users have added fonts and created sets that they would like to retain, instruct users to export fonts using the **File > Collect Fonts for Output** command before beginning the migration process.

Steps in the migration process

1. [Examine the Font Reserve Server Database](#)
2. [Check the Font Reserve Server Migration Tool System Requirements](#)
3. [Start and stop Font Reserve Server](#)
4. [Run the Font Reserve Server Migration Tool](#)
5. [Restore the TAR backup](#)
6. [Reset the Server Administration Super-User password](#)
7. [Understand what is Migrated from Font Reserve Server](#)

Examine the Font Reserve Server Database

Before taking the steps to upgrade your server, make sure that your current installation is in good working order. Take a few moments to remove any unnecessary users, workgroups and sets. This will help keep your Universal Type Server installation clean from the start, and only migrate the data that you really need.

It's also important to note that if you choose to use the migration tool, any existing data that you have already configured in your Universal Type Server installation will be lost.

To be most effective, the migration tool must be used at the start of the configuration process.

Font Reserve Server Migration Tool System Requirements

- Font Reserve Server 1.7.6 (Mac) or 1.7.6.1 (Win)
- Mac OS 10.4 or higher
- Hard disk space equal to double the size of your current font library

While the Font Reserve Server Migration Tool must be run on a Mac OS X machine, the tool will work on databases that reside on either Mac or Windows servers.

During the migration process, all fonts, users and workgroup data are downloaded from the server. The tool then creates a TAR archive file of your data that is used to create the new Type Server database. This is why the machine on which you run the migration tool must have at least double the space required to store your entire database.

Start and Stop Font Reserve Server

For the migration tool to function properly, the Font Reserve Server must be in a specific state. The following process of starting and then stopping the server logs off all connected users and places Font Reserve Server it in the appropriate state for migration.

1. From the machine that is running Font Reserve Server, open the Font Reserve Server Manager application.
Choose **Applications > FRServerManager** (Mac) or **Start > Programs > Extensis > Font Reserve Manager** (Win).
2. If the server is currently running, click **Stop**.
If the server is currently stopped, click **Start**, wait for the service to start, then click **Stop**.

The Font Reserve Server Migration Tool

The migration tool steps you through the process of migrating much of your existing Font Reserve Server database into a Universal Type Server backup .TAR file.

1. The migration tool needs file system level access to the Font Reserve Server Vault. If you are running the migration tool on a machine other than the local server, mount a server share that contains the Font Reserve Server Vault.
If you are running the migration tool on a machine other than the machine currently running Font Reserve Server, port 20250 must be open in your server firewall. This is in addition to the other ports typically required for everyday operation of Font Reserve Server (3404 and 3403).
2. Double-click to launch the Font Reserve Server Migration Tool.
3. In the Server Address field enter the IP Address or DNS name of the Font Reserve Server Machine.
If you are running the migration tool locally on the server, enter `localhost` in this field.
4. In the Vault Path field, enter the folder path to the Font Reserve Server vault.
For example: `/Library/Font Reserve Server/Vaults/FontServerVault`
5. In the Output Path field, enter a target location where you would like to create the Universal Type Server backup .TAR file.
6. Choose what level of data you want to preserve:
All data – this setting migrates all fonts, user records, workgroups, sets, licenses and other data. For a more complete accounting of the data migrated, and the location in Universal Type Server, see [the migration chart](#).
Fonts only – This setting only migrates the fonts from your Font Reserve Server vault into a new Universal Type Server workgroup named **Font Reserve Upgrade**. This does not migrate users, workgroups, sets or other data.
7. Click **Export** to begin the migration.
Depending upon the size of your database, it may take a long time to download all of the data and build the backup TAR file that you will use to restore in Universal Type Server.
Fonts that are unable to be migrated are placed in a folder named **Unmigrated fonts** in the same location as the TAR archive. After restoring the archive, use the Universal Type Client to re-add these fonts.

Restore the TAR backup

After running the migration tool, the result is a .TAR backup file. To bring your Font Reserve data into Universal Type Server, you must use the Universal Type Server's Server Administration web interface to restore the backup.

1. Copy the .TAR backup file to the machine running Universal Type Server.
2. Open the Server Administration web interface. The default server location is port 8081. For example:
`http://10.1.5.95:8081`
`http://localhost:8081`
3. Click the **Backups** link.
4. In the **Restore from backup file** field, enter the path to the .TAR backup on your server. For example:
`C:\Program Files\Extensis\Universal Type Server\data\backups\mybackup.tar`

- Click **Restore datastore**.
WARNING: This overwrites all previously entered data, including fonts, users and workgroups in Universal Type Server.

Reset the Server Administration Super-User Password

After restoring the .TAR file, the Server Administration Super-User password is reset to the default username, “administrator” and password, “password”. To change this password:

- Open the Users and Workgroups web interface. The default server location is port 8080. For example:
`http://10.1.5.95:8080`
`http://localhost:8080`
- Login using the default Super-user account name and password, "administrator" and "password".
- In the Users pane, select the Administrator account.
- In the Details pane, click **Edit**.
- Enter a new password and click **Update**.
Keep a record of the new password for future use.

What is Migrated from Font Reserve Server?

Workgroups

Font Reserve Server	Universal Type Server
Workgroups	All workgroups and associated fonts, sets and users are migrated. The default role for each workgroup is automatically set to Regular User.
Workgroup based permissions	Workgroups that had the Add or Delete permissions enabled are translated to associated user-based permissions in Type Server. Users automatically have the Add and Remove Fonts permission that matches the previous workgroup settings. All other workgroup permissions in Type Server remain at the default.
Personal workgroups	If a user has a personal workgroup, it is are migrated from Font Reserve Server and is available from the Universal Type Client.

Users

Font Reserve Server	Universal Type Server
User accounts	Users have the same account names for Universal Type Server as they did in Font Reserve Server.
User passwords	User passwords are not retained during the migration process. The default password for each user is set to their username. Encourage users to change their password after the first login.
Workgroup Administrator permission	Users with the Workgroup Administrator permission are automatically given the Font Administration permission for all associated workgroups in Type Server.

Fonts

Font Reserve Server	Universal Type Server
Fonts	All fonts are migrated into workgroups with the same names and user access as in Font Reserve Server.
Font ownership	Fonts that are migrated from Font Reserve Server are labeled as “Added by” the administrator.
Font license name	A new font license using the Font Reserve Server Font license name is created in Type Server.
Font license info	Any font license info is migrated into the new Type Server license and placed in the Font License Notes field.
Keywords	All keywords are migrated to Type Server and applied to the appropriate fonts.
Classifications	n/a - Custom Font Reserve Server classifications are not migrated.

Sets

Font Reserve Server	Universal Type Server
Sets	Sets created by each user are preserved for that user.
Shared sets	Shared sets are preserved within each new workgroup.
Set ownership	Sets that are created by the migration tool are labeled as “Created by” the administrator.
Permanently active sets	Sets with the name Permanently Active Set are migrated into the new workgroup as a standard set. The set can then be shared or made permanently active by a user with the appropriate permission.