



upgrading from
Suitcase Server

Universal Type Server™

The Evolution of Suitcase™ and Font Reserve™



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Upgrading from Suitcase Server

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

This covers the main conceptual differences between Extensis Suitcase 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

Task	Suitcase Server	Universal Type Server
Enter default administrator username and password	Default username: admin Default password: (blank)	Default username: administrator Default password: password
Start, stop, pause the server	Mac: Suitcase Server Launcher Windows: Administrative tools > Windows Services console	Server Administration web interface via web browser
Users (create, modify, assign permissions, delete)	Server Administration Users and Groups dialog box	Users and Workgroups Administration web interface via web browser
Groups (create, modify, delete)	Server Administration Users and Groups dialog box	Users and Workgroups Administration web interface
Adding fonts	Drag fonts to the Suitcase Server Administration dialog	Users with permission to do so can drag fonts directly into the workgroup in the Type Client
Mimic font delivery of Suitcase Server	n/a	Specify the font replication mode "all" for each user that it is required

Basic Conceptual Differences

There are some fundamental differences between how Suitcase Server and Universal Type Server function. For complete details about each feature, see the Universal Type Server User Guides and webhelp.

Workgroups and Sets

Workgroups are a bit different than what you'll remember from Suitcase Server. In Suitcase Server, groups were used to create distinct groups of users, and server sets were used to organize fonts. You would then add sets of fonts to groups so that users could subscribe to sets.

In Universal Type Server, a workgroup is a "mini-database" that contains both users and fonts. Every user who is a member of a workgroup has access to all of the fonts within that workgroup without needing to "subscribe" to anything.

Font Sets exist in one workgroup or another; they do not span workgroups. All users can create sets that are visible only to the user, yet with the proper permission a user can share sets with everyone in the workgroup.

Users can be members of more than one workgroup, so you can continue to organize your fonts on a workgroup basis.

Server Synchronization

Server synchronization is also set at the server level from the Users and Workgroups Administration web interface. Synchronization is controlled by administrators on user-by-user basis. You can configure synchronization so that it functions like Suitcase Server where the client user chooses when to synchronize, or you can have the server synchronize automatically, from every 30 seconds to once a month.

It's important to note that Universal Type Server can be configured to optimize network performance by choosing the appropriate Font Replication Mode for each user. The default mode transfers fonts from server to client only when that font is required for preview or activation.

You can configure Type Server so that it functions like Suitcase Server by choosing the Font Replication Mode of "All" for each of your users. This setting ensures that all fonts are downloaded to the client, whether or not the client has previewed and activated the font. Of course, clients will only download fonts from workgroups for which they are members. If you have a large number of fonts, this may not be the most efficient way of configuring your system.

Permanently Active Sets

Much like the Required Sets feature in Suitcase Server, if you want to require all users in a workgroup to activate a specific set of fonts in Universal Type Server, you can create permanently active sets. This feature allows administrators to create a set within a workgroup, add fonts to the set, and then make that set permanently active. This ensures that all members of the workgroup will have this set of fonts active on their system at all times.

Importing Users

If your organization uses Active Directory to manage users, you can use Active Directory or Open Directory as a source for your users.

Duplicate Fonts

Unlike Suitcase Server, if a font is a true duplicate, an exact copy exactly same font, it is not allowed in Universal Type Server. Through the use of a sophisticated font identification technology called Font Sense each font is accurately identified, and only one copy is kept on the server.

For example, you might have a PostScript Type 1 and OpenType versions of a font. These are different formats and will likely have the same name, but are not true duplicates. However, if you have two or more copies of an OpenType, they would both be added only if some key font metadata was different, including the PostScript Name, Foundry, version number, etc.

Font Licensing

As with Suitcase Server, users with the appropriate permission can manage license information using the Universal Type Client. Licenses are created and then applied directly to fonts. Users can then search for fonts with specific licenses applied, as well as run reports for font licensing compliance.

Server-Based and Client-Based Personal Workgroups

In Suitcase Server, users could add fonts that were not added to the server and were only available to the local machine. The admin could limit a Windows user from adding any new fonts, but Macintosh users could add any fonts that they required. In Universal Type Server, you can specify if users are able to add fonts through the use of personal workgroup. Personal workgroups can be stored either on the user's machine, or on the server. If the personal workgroup is stored on the server, the user can access his or her personal workgroup from any computer.

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.

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 things that were previously unavailable in Suitcase Server. 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. Many of the tasks performed in this web interface were performed in the Users and Groups dialog box in Suitcase Server. Some of these tasks 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.

New Permissions Structure

In Suitcase Server, user permissions were set on a server-wide basis. This meant that users could access fonts and manipulate fonts in any set and group based on one set of permissions. Universal Type Server gives administrators a greater level of control because user permissions can be different in the context of each workgroup. As a result, users may not be able to perform the same activities in each workgroup to which they belong. For example, a user may be able to add and collect fonts in one workgroup, while in another workgroup only allowed to activate and deactivate fonts.

The new permissions structure eases the process of setting up users and workgroups and provides more granular control. Key features include differences are:

- **Add, Delete, Collect:** The ability to add, delete, and export 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 give users different levels of administration permissions. Users can be given the Font Administrator role, and this is basically the equivalent of the Font Administrator user permission in Suitcase Server. 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. To give users the equivalent of the Server Administrator permission, in Universal Type Server enable the Is Full Administrator permission in the user's Settings tab from the Users and Workgroups Administration web interface.

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. The following table shows you where many of the Suitcase Server equivalent permissions can be located. It's important to note that permissions listed on the Global tab can also be applied on a workgroup by workgroup basis by choosing each workgroup name in the Workgroup tab.

Suitcase Server User Permission	Universal Type Server Permission or Setting	Universal Type Server Location
Full Name	Full Name	Account tab
User Name	Account name	Account tab
Password	Password	Account tab
User can create new local sets	n/a - all users can create sets within workgroups	n/a
User can collect fonts for output	Collect Fonts for Output	Global tab
User can add local fonts	Has Personal Workgroup	Settings tab
User can deactivate Required/Activated fonts	n/a – if a an administrator makes a set permanently active, all fonts in that set cannot be deactivated.	n/a
User can add local fonts temporarily	n/a there is no direct equivalent of temporary fonts. Users may add fonts to personal workgroups to use fonts without sharing them with an entire workgroup.	n/a
User can add/remove keywords and styles	Keywords; Styles, Classifications, Foundries and Families	Global tab
User can override system fonts	n/a – To avoid font conflicts, system fonts cannot be overridden.	n/a
User can use auto-activation	n/a – all users can utilize the Universal Type Server auto-activation plug-ins.	n/a
Update at startup	Client synchronization is controlled using synchronization and font replication settings.	Settings tab
User can assign/unassign keywords and styles	Keywords; Styles, Classifications, Foundries and Families	Global tab
User can manage system fonts	n/a – User cannot manage system fonts	n/a
User can save finds	n/a – All users can create smart sets that automatically execute saved find settings	n/a
Font Administrator	Font Administrator Role	Roles pane
Server Administrator	Is Full Administrator	Settings tab

Additional New Items

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

Universal Type Client and Administrative Tasks

While the majority of Type Server administrative functions are performed through the Server Administration and Users and Workgroups Administration web interfaces, there are a number of administrative tasks that can be performed directly through the Universal Type Client interface.

In general, if the administrative task requires interacting with fonts, the action will be performed directly from the Type Client. Some of these tasks include:

- Creating permanently active sets
- Creating and adding font licenses
- Running font licensing reports

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. The Bonjour technology is supported for both Mac and Windows clients and server installations.

Auto-Activation Plug-ins

The Universal Type Client auto-activation plug-ins are improved over those available for the Suitcase X1 client. The new plug-ins include many features that were previously unavailable, including:

- Font Sense based font activation uses sophisticated font identification technology to always activate exactly the right font. Once you save a document with the Universal Type Client auto-activation plug-ins, Font Sense metadata is saved right into the document, ensuring that any user who opens the document will always use the correct fonts.
- You can create a set of the fonts used in a document right from the plug-in.
- 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.
- The ability to activate only fonts from a single workgroup. This way you can use fonts only in a known, approved Type Server workgroup, and not inadvertently use fonts not intended or licensed for other use.

The Universal Type Core

One very important difference between the Suitcase Server client and the Universal Type Client is that to keep fonts active, you do not need to keep the client running. The Universal Type Client uses a background application called the Universal Type Core to keep fonts active. Once logged in to the server, your users can 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.

Suitcase Server Migration Process

If you have a previous installation of Suitcase Server, you may want to use the Suitcase Server 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 Suitcase 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 Suitcase Server 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.

Migrating from Suitcase Server

Before taking the steps to migrate your server, it is a good idea to make sure that your current installation is in good working order. Take a few moments to remove any unnecessary users, groups 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.

Suitcase Server Migration Tool System Requirements

- Suitcase Server 11.0.0
- Mac OS 10.4 or higher
- Hard disk space equal to double the size of your current font library

While the Suitcase 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.

NOTE: If you are working in an environment with only Windows clients, Extensis recommends that you rebuild your server database from scratch. Otherwise, Extensis Integration and Consulting Services (ICS) may also be able to help with your upgrade process, contact Extensis Corporate Sales for more information.

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.

Preparing Suitcase Server

For the migration tool to function properly, all users must be logged off and not using Suitcase Server. The easiest way to do this is to stop and restart the server. The Suitcase Server must be running with no users connected for the migration tool to be successful.

1. Notify all users to log off Suitcase Server.
2. For Macintosh servers, from the machine that is running Suitcase Server, open the Suitcase Server Launcher. Click **Stop** then click **Start** to restart the server.
3. For Windows servers, open the services window from the control panel. Double-click the Suitcase Server icon and in the Service Status area of the dialog box. Click **Stop** then click **Start** to restart the server.

The Suitcase Server Migration Tool

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

1. Double-click to launch the Suitcase Server Migration Tool.
2. In the **Output folder** field enter a location where you want to place the output TAR file, or click the **Browse** button and navigate to a location on the local disk.
3. In the Server Authentication dialog box, enter the server IP address or DNS name, or alternately, click **Locate Server** and navigate to your Suitcase Server. If you are running the migration tool locally on the server, enter `localhost` in this field.
4. Enter the username and password of any Suitcase Server administrator.
5. Click **OK** to begin the migration process. 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.
6. Fonts that are unable to be migrated are placed in a folder named **Unmigrated fonts** in the same location as the TAR archive. These include Windows-only PostScript fonts as well as fonts that may be considered corrupt. After restoring the archive, re-add Windows-only fonts using the Windows version of the Universal Type Client.

Restore the TAR backup

After running the migration tool, the result is a .TAR backup file. To bring your Suitcase Server 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`
5. Click **Restore datastore**.
WARNING: This overrides 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:

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

Collect Local Fonts and Add to Personal Workgroups

When using Suitcase Server, users could be given the permission to add fonts from their local machine. Mac OS X users required the Manage Local Fonts permission, and all Windows users were able to add fonts from their machine. Since these fonts were never added to the server, the fonts cannot be automatically migrated to the new Universal Type Server installation. Local fonts must be manually migrated by each client user.

Before you tell users to migrate fonts, if you don’t want all of your users’ local fonts added to the server database, be sure to enable the Has Personal Workgroup setting for all users who need permission to add fonts locally. Personal workgroups can be stored either on the Type Server, or locally on the user’s machine. Either setting restricts use of fonts in the personal workgroup to each user.

Collecting Local Font on Mac OS X

If a client user has created a number of sets, to migrate fonts while preserving set groupings, use the following procedure.

1. Using the finder, create a main folder that will contain all of the local fonts.
2. In that folder, create a sub-folder for each set that you want to preserve.
3. In Suitcase X1, select a set and choose Tools > Collect for Output.
4. Navigate to the appropriate sub-folder and click Collect.
5. Repeat steps 3-4 for all sets required.
6. Quit the Suitcase client.
7. Launch the Universal Type Client.
8. Open the main set folder and drag all of the sub-folders into the Personal Workgroup in the Workgroups pane. Dragging each set folder into the Personal Workgroup creates a set for each folder.

Collecting Local Fonts on Windows

To move fonts that were added locally, you must first know where the fonts reside. In Suitcase for Windows, fonts can either be added to the vault, or in place from their current location.

If the font files are stored in the vault, the file path in Suitcase for Windows will indicate “Vault,” and if added in place, the font’s physical location on the disk is displayed. If font files are added in place, drag the folder containing fonts from the explorer into the Personal Workgroup in Universal Type Client. Otherwise, if the fonts are stored in the vault, you will need to drag the files directly out of the vault location into the Personal Workgroup.

If the font files are stored in the vault on a Windows XP machine, the vault is located here, where <username> refers to the current user’s Windows username:

```
C:\Documents and Settings\\Application
Data\Extensis\Suitcase\Suitcase Font Database.suitcasevault\
```

NOTE: If you are unable to locate the Application Data folder, it is likely that you don't have your system set to display hidden folders. To show this, from the Windows Explorer, choose **Tools > Folder Options**. In the Advanced Settings area of the View tab, enable the option to **Show Hidden Files and Folders**.

If the font files are store in the vault on a Windows Vista machine, the files are located:

```
C:\Users\\AppData\Roaming\Extensis\Suitcase\Suitcase Font Database.suitcasevault\
```

NOTE: If you are unable to locate the AppData folder, it is likely that you don't have your system set to display hidden folders. To show this in Windows Vista, choose **Start Menu > Control Panel > Folder Options**. In the Advanced Settings area of the View tab, enable the option to **Show Hidden Files and Folders**.

What is Migrated from Suitcase Server?

Users

Suitcase Server	Universal Type Server
User account name and password	Users will all have the same account name and password in Universal Type Server as they had in Suitcase Server.
Admin account	The default admin account in Universal Type Server is the administrator account with a default password of "password". Use this new user account for the top level of server administration. Be sure to change the default password as soon after installation as possible.
Server Font User permission	Users who had the Server Font User permission are given the Regular User role in workgroup that they are members. Associated permissions that most closely match previous Suitcase Server settings are also selected.
Font Administrator permission	Users who had the Font Administrator permission in Suitcase Server are given the Font Administrator role in workgroups to which they are members.
Server Administrator permission	Any user who had the Server Administrator permission in Suitcase Server is automatically given the Font Administrator role in workgroups to which they are members. To enable more robust Type Server control, you may want to enable the Full Administrator setting for select users.

Groups

Suitcase Server	Universal Type Server
Groups	A new workgroup is created in Type Server for each group in Suitcase Server. The default role for each workgroup is automatically set to Regular User.
The "All Users" Group	If your Suitcase Server configuration included sets assigned to All Users, a new workgroup in Type Server named Suitcase Server – All Users is created. This workgroup contains all users, as well as fonts from sets previously assigned to the group.

Fonts

Suitcase Server	Universal Type Server
All Suitcase Server Fonts	All fonts that were stored in Suitcase Server, including fonts that were not assigned to a group, are included in a new workgroup named Suitcase Imported Fonts .
Font ownership	Fonts that are migrated from Suitcase Server are labeled as Added by the administrator.
Windows only fonts	Since the migration tool runs in Mac OS X only, Windows-only fonts, such as Windows PostScript Type 1 fonts cannot be adequately checked for corruption. Any Windows-only fonts are placed by the migration tool in a folder named Unmigrated Fonts in the same folder as the TAR backup. To ensure that these fonts are valid, re-add them using the Windows Universal Type Client.

Sets

Suitcase Server	Universal Type Server
Sets	All Suitcase Server sets are created within new Type Server workgroups based on how the sets existed within Suitcase Server groups.
Set ownership	Sets that are created by the migration tool are labeled as Created by the administrator.
Sets in multiple groups	Sets that were in multiple groups in Suitcase Server are duplicated across multiple workgroups in Type Server.

What is not migrated

Licenses

The method of license tracking used by Suitcase Server doesn't directly map over to the new licensing structure. Before running the migration tool, be sure to take a manual assessment of your licenses and then recreate those in Type Server.

Keywords and custom font attributes

Custom font attributes, including keywords, classifications, etc. entered into the Suitcase client are not available for migration. This is because in the Suitcase Server method, font attribute data was stored on the user's local machine. In Universal Type Server, this data is stored at a server level, ensuring that all users have access to the same font attribute information.