



users & workgroups
Administration Guide

Universal Type Server™

The Evolution of Suitcase™ and Font Reserve™



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Welcome to Universal Type Server

Merging the power and usability of the two longstanding client-server font management solutions, Universal Type Server™ is the next generation of workgroup font management software.

Written for the latest operating systems, this cross-platform system combines the power, speed, and control that administrators need with the seamless font delivery and elegant interface that users expect.

Universal Type Server provides the centralized control, consistency, and compliance for all levels of font management - administrators as well as client users. Administrators can rest assured that the appropriate fonts are available to the client when they need them, and rogue fonts are kept out of the workflow. Meanwhile, users are certain that they are using the correct, approved fonts for their projects by using the Universal Type Client™.

About the Users and Workgroups Administration Guide

After installing Universal Type Server and configuring any necessary networking settings in the instructions in the Server Administration Guide, the next step is to prepare the Type Server for your users. This guide covers all topics related to the configuration of workgroups, roles and users.

This guide covers typical strategies for workgroup configuration, worksheets, as well as detailed instructions for all tasks that are completed through the Users and Workgroups Administration web interface.

Users and Workgroups Administration overview

After installing Universal Type Server and performing any necessary configuration in the Server Administration web interface, the next step in the installation process is to plan your configuration, then create workgroups and add users.

Workgroups are the large containers in which fonts are stored. Administrators provide user access to workgroups by adding users to workgroups. All workgroup and user tasks are performed through the Users and Workgroups Administration web interface. It is here that administrators create workgroups, user accounts as well as manage associated settings and permissions.

The basic user and workgroup configuration steps include:

1. [Plan your configuration](#)
2. [Create workgroups](#)
3. [Create new users](#)
4. [Add users to workgroups](#)
5. [Assign workgroup roles to users](#)
6. [Modify user settings as required](#)

After completing the steps above, you are ready to add fonts to workgroups using the Universal Type Client.

Any font-related task - such as adding and deleting fonts, tagging fonts with keywords, tracking licenses, and activation - are accomplished using the Type Client. For detailed instructions, see the Universal Type Client User Guide and web help.

Planning Your Configuration

The mechanics of setting up Universal Type Server are not difficult. Adding workgroups, roles, and users are fairly simple matters. Yet, Universal Type Server can be configured in many different ways. To best meet the workflow needs of your organization, we recommend that you take a moment to plan how you'll configure your installation.

To create the ideal solution in your environment, you need to think through all the fonts you have, where they're from, what they're for, who's using them, and how they're using them. To help with the setup, we describe several typical workflows along with detailed explanations of their workgroups, user permissions, and roles. Once you identify the most logical configuration, use the included [workgroup](#) and [user](#) worksheets to plan out your workgroups and users before creating your system.

You may find that configuring a server for a small group of users helpful when determining the appropriate workgroups, roles, permissions and settings for your environment.

Sample configurations

While you can structure your workflow in any way you want, you'll probably end up working with one of three common configurations: full access, project based, or department based.

Organizing Fonts on a Department Basis

If you have distinct groups of users that each require a different set of fonts, workgroups can be created for each department or group. This configuration is typical for companies with large numbers of users, such as magazines and book publishers.

With this configuration, fonts are added to workgroups based on each group's specific font needs. For example, a publishing environment might contain workgroups for design, editorial, advertising, and production. The fonts contained in each workgroup as well as the workgroup default roles can vary according to the user's font needs.

For example, the editorial department would likely have a well defined and locked down set of fonts. Users in this workgroup just need to know that they have the correct fonts, and would not likely need much additional font organization. With the fairly restrictive [Regular User](#) role applied as the default workgroup role, the administrator can be sure that all users in the editorial workgroup have what they need, and aren't able to modify fonts.

Organizing Fonts on a Project Basis

With a project-based organization method you create workgroups for specific projects. This configuration is typical for companies with a medium to a large number of users, who typically work in teams, like design firms and ad agencies.

With this configuration you might have a workgroup for each division, client, campaign, or other project. Type Server users are only added to workgroups to which they are required. This way each project is contained within its own workgroup, and users can be certain that they have the fonts required for project.

Providing Full Access

This is the most basic way to set up Universal Type Server, yet works well in environments with very few users such as small design groups and prepress shops. Basically, all fonts are added to a single workgroup to which all users are members. Through the use of a fairly permissive default workgroup role, each user is given the ability to perform most actions with all of the server fonts.

This method works great in situations where there isn't a dedicated IT administrator, and all of your users are fairly savvy. This workflow allows all users to have full access to all of the organization's fonts to complete their jobs. The downside of this method is that it doesn't scale well to fit larger workgroups, and has an inherent lack of control over keyword vocabulary as well as lack of control over which users can add and remove fonts.

This method can work well if you're installing Type Server on a trial basis.

Department Based Configuration

Organizations with fairly structured departments that each have specific font needs can benefit from organizing fonts into department workgroups. This configuration is typical for companies with large numbers of users, such as magazines and book publishers.

For example, a publishing company might have different workgroups for the editorial, layout, and production departments. The editorial department doesn't choose which fonts to use, yet for copy-fitting needs, it is imperative that they have the correct fonts for the job. The layout team needs access to all of the company's fonts to have creative control over the design of each project. And the production group needs access to most of the company's fonts as well as the ability to collect fonts for printing jobs. Using a department based configuration, each department has its own workgroup and default role for users. This way administrators can easily control the fonts and permissions available to each workgroup.

Choose or Create Default Roles

The first step is to write down a list of the required workgroups, and then create a list of default roles for each workgroup. The default role for a workgroup controls a base set of permissions for all users added to the workgroup. The predefined roles that come with Type Server may work well for you, yet if you require different default permissions it's best to create a custom role at this point.

To display the permissions for each predefined role:

1. [Open the Users and Workgroups Administration web interface.](#)
2. From the **Roles** pane, select each predefined role to examine the default permissions settings.
3. Write down a default role for each workgroup, or if required, [create custom roles](#) for your workgroups. Use the [workgroups worksheet](#) to help you define settings.
For example, the Editorial workgroup might have Regular User as its default role, the Layout workgroup might have Font Administrator as the default role, and the Production workgroup might have a custom role that grants permission to add and remove fonts as well as collect fonts for output.

Create Workgroups

Next, create the workgroups required for your projects or clients.

1. In the **Workgroups** pane, click the **Add (+)** button. This opens the **New Workgroup** details pane.
2. Enter a **Workgroup Name** for the workgroup.
3. Choose a **Default Role** from the drop-down menu. Choose the default role that you wrote down in the workgroups worksheet.
4. Click **Update** to add the new workgroup.
5. Repeat this process to create all necessary workgroups.

Create Users

The next step is to create all of the users and add them to the workgroups.

To plan out each user's permissions, you may want to use the included [user worksheet](#). Most likely, all of the permissions listed on the worksheet will be set by the user's role in the workgroup. Yet, if necessary, administrators can set each permission for users on an individual basis.

To create a new user:

1. In the **Workgroups** pane select your new workgroup. Selecting the workgroup ensures that new users are automatically added to this workgroup.
2. In the **Users** pane, click the **Add (+)** button.
3. In the **New User** details pane, in the **Account** tab, enter the basic account information:
 - Account Name** - Each user account name must be unique. It's best to use an account name that is short, easy to remember and does not include spaces or letter case variations.
 - Full Name** - required field. For ease of alphabetization, you can enter names in a "Last Name, First Name" format so that names can be easily sorted in the users pane.
 - Email Address** - optional field.
 - Password** - this case-sensitive field is optional. If left blank, a password is not required for this user to login.
 - Notes** - enter any notes to appropriately identify the user.
4. Click **Update** to add the new user.
5. Repeat this process until all of your users are added.

Add Users to Workgroups

After adding users, users need to be assigned to each workgroup.

1. In the **Workgroups** pane, select the **All Users** workgroup.
2. To assign users to workgroups, from the **Users** pane, select the username and drag it to a workgroup. Users can belong to one or more workgroups.

Delegate Roles

After adding users to workgroups, you'll need to delegate roles for each workgroup. Each user is assigned the default role when added to the workgroup, yet each workgroup will likely need users who have elevated permissions within the workgroup. It is best to assign these permissions with user roles.

When working with departments, you will need to have at least one person who is able to add, remove, and organize fonts within the workgroup. You can assign the Font Administrator role to users who need this ability.

If you have teams that are continually changing, and require the addition and removal of users from projects, you may need a Full Administrator for each workgroup. Full Administrators are able to login to the Users and Workgroups Administration web interface and manage users as well as manage server settings. Having additional Full Administrators can be handy if your teams are located in different time zones and you need to manage workgroups in a timely fashion.

To delegate roles:

1. In the **Workgroups** pane, select the workgroup name.
2. From the **Users** pane, select the user that you want to update.
3. In the **Details** pane, click **Edit**.
4. In the **Workgroup** tab, select the workgroup name from the **Show permissions for Workgroup** drop-down menu.
5. Choose a new role for this user in the selected workgroup from the **Role in Workgroup** drop-down menu.

Configure User Settings

After adding users, you need to determine the most appropriate font replication mode, synchronization and personal workgroup settings for each user. These settings control when fonts are brought down from the server to the client, and how long those fonts remain on the user's system. Typically, the default settings will work for most users, but for certain users exceptions can be made. These are configured on the **Settings** tab for each user.

- The default [time between server syncs](#) should work for most installations. The exception may be a user who doesn't often need new or updated fonts. For these users, a longer synchronization interval can be set.
- The Font Replication mode controls when fonts are copied from the server down to the client machine. The default mode is **On-demand**, which gives users fonts only when they need to preview or activate them. The On-demand setting is typically the best choice for client machines that stay in the office. For users who are working on laptops and may need to work offline frequently, set the [font replication mode](#) to **All**. This ensures that all fonts in the Type Server are downloaded to the client, and always available for use offline.
- Enable [personal workgroups](#) for users who need to add and activate fonts that they won't need to share with the rest of the workgroup. Server-based personal workgroups can be very helpful for users who work on multiple machines and need access to the same personal fonts on each machine. Otherwise, it's a good idea to have all users always add fonts to the main workgroup, and use sets to further organize fonts as necessary.

Add and Organize Fonts

After configuring users, distribute account login settings to users. Those who have permission can now begin adding fonts to workgroups using the Type Client.

For more information about adding, organizing, and managing fonts, see the Universal Type Client User Guide and web help.

Project Based Configuration

This configuration is typical for companies with a medium to a large number of users, who typically work in teams, like design firms and ad agencies. If you have projects or clients that are easily separated into groups, a project based configuration method might be best for you.

For example, an agency that assigns employees to specific clients would benefit from having a workgroup for each client. Using this method, users who are working with a specific client are added to the client workgroup and thus have access to all fonts necessary for that client's projects. Further font organization is available within each workgroup through the use of font sets. So, if you create a workgroup for each client, you can organize fonts within each workgroup by creating a set for each project you do for that client.

Create Workgroups

The first step is to create the basic workgroups required for your projects or clients.

1. [Open the Users and Workgroups Administration web interface.](#)
2. In the **Workgroups** pane, click the **Add (+)** button. This opens the **New Workgroup** details pane.
3. Enter a **Workgroup Name** for the workgroup.
4. Choose a **Default Role** from the drop-down menu. For project-based workgroups, it is best to choose the **Regular User** default role. Less restrictive permissions can be set later for specific users by delegating user roles for each workgroup.
5. Click **Update** to add the new workgroup.
6. Repeat this process to create all necessary workgroups.

Create Users

The next step is to create all of your users and add them to the workgroups.

To create a new user:

1. In the **Workgroups** pane select your new workgroup. Selecting the workgroup ensures that new users are automatically added to this workgroup.
2. In the **Users** pane, click the **Add (+)** button.
3. In the **New User** details pane, in the **Account** tab, enter the basic account information:
Account Name - Each user account name must be unique. It's best to use an account name that is short, easy to remember and does not include spaces or letter case variations.
Full Name - required field. For ease of alphabetization, you can enter names in a "Last Name, First Name" format so that names can be easily sorted in the users pane.
Email Address - optional field.
Password - this case-sensitive field is optional. If left blank, a password is not required for this user to login.
Notes - enter any notes to appropriately identify the user.
4. Click **Update** to add the new user.
5. Repeat this process until all of your users are added.

Add Users to Workgroups

After adding users, users need to be assigned to each workgroup.

1. In the **Workgroups** pane, select the **All Users** workgroup.
2. To assign users to workgroups, from the **Users** pane, select one or more user names and drag them onto a workgroup name in the **Workgroups** pane. Users can belong to one or more workgroups.

Delegate Roles to Users

After adding users to workgroups, you'll need to delegate roles for users in each workgroup. Roles give users the ability to perform extra functions within a workgroup and are set on a user-by-user basis. Most users will do fine with the default role, while others will be assigned special abilities through the use of a different role.

When working with projects, you will need to have at least one person who is able to add, remove and organize fonts within the workgroup. You can assign the Font Administrator role to users in each workgroup who need this ability.

If you have teams that are continually changing, and require the addition and removal of users from projects, assign the [Full Administrator](#) setting to at least one user for each workgroup. Full Administrators are able to login to the Users and Workgroups Administration web interface and manage users. Having an additional Full Administrator can also be handy if your teams are located in different time zones and you need to manage workgroups in a timely fashion.

Before assigning roles, click each role name in the **Roles** pane. If these roles do not meet your needs, you can [create a custom role](#) to assign to users.

To delegate roles:

1. In the **Workgroups** pane, select the workgroup name.
2. From the **Users** pane, select the user that you want to update.
3. In the **Details** pane, click **Edit**.
4. In the **Workgroup** tab, select the workgroup name from the **Show permissions for Workgroup** drop-down menu.
5. Choose a new role for this user in the selected workgroup from the **Role in Workgroup** drop-down menu.

Configure User Settings

After adding users, you need to determine the most appropriate font replication mode, synchronization and personal workgroup settings for each user. These settings control when fonts are brought down from the server to the client, and how long those fonts remain on the user's system. Typically, the default settings will work for most users, but for certain users exceptions can be made. These are configured on the **Settings** tab for each user.

- The default [time between server syncs](#) should work for most installations. The exception may be a user who doesn't often need new or updated fonts. For these users, a longer synchronization interval can be set.
- The Font Replication mode controls when fonts are copied from the server down to the client machine. The default mode is **On-demand**, which gives users fonts only when they need to preview or activate them. The On-demand setting is typically the best choice for client machines that stay in the office. For users who are working on laptops and may need to work offline frequently, set the [font replication mode](#) to **All**. This ensures that all fonts in the Type Server are downloaded to the client, and always available for use offline.
- Enable [personal workgroups](#) for users who need to add and activate fonts that they won't need to share with the rest of the workgroup. Server-based personal workgroups can be very helpful for users who work on multiple machines and need access to the same personal fonts on each machine. It can also be helpful for users who may need to experiment with a few fonts for a project before purchasing a large number of licenses and adding those fonts to a workgroup for other users. Otherwise, it's a good idea to have all users always add fonts to the main workgroup, and use sets to further organize fonts as necessary.

Add and Organize Fonts

After configuring users, distribute account login settings to users. Those who have permission can now begin adding fonts to each workgroup. Other client users are then able to activate and deactivate fonts as required for each project with the Type Client.

For more information about adding, organizing, and managing fonts, see the Universal Type Client User Guide and web help.

Full Access Sample Configuration

The most basic way to configure Universal Type Server is to place all of your fonts into a single workgroup and allow all of your users a very permissive level of access to those fonts. This method sacrifices some of the administration control available in Universal Type Server for the benefits having users police their own actions with fonts on the server.

Typically workgroups such as small design houses or prepress shops will choose this method of configuration.

The following setup instructions contain the recommended way to setup your Type Server to allow full access for all users. Your process may vary based on your group's needs.

Create the Workgroup

The first step is to create the workgroup that will house all of your fonts.

1. [Open the Users and Workgroups Administration web interface.](#)
2. In the **Workgroups** pane, click the **Add (+)** button. This opens the **New Workgroup** details pane.
3. Enter a **Workgroup Name**. This is the name displayed in the client, and is the location where all users will add and activate fonts.
4. Choose a **Default Role** from the drop-down menu. Since all of your users will have the same level of access, it's a good idea to set a default role that isn't very restricting. Choose **Font Administrator** from the list. This will allow any user to perform necessary organization and maintenance tasks using the Type Client and also gives your users a wide variety of abilities to add, organize and tag fonts within workgroups.
5. Click **Update** to add the new workgroup.

Create Users

The next step is to create all of your users and add them to the workgroup.

To create a new user:

1. In the **Workgroups** pane select your new workgroup. Selecting the workgroup ensures that new users are automatically added to this workgroup.
2. In the **Users** pane, click the **Add (+)** button.
3. In the **New User** details pane, in the **Account** tab, enter the basic account information:
 - Account Name** - Each user account name must be unique. It's best to use an account name that is short, easy to remember and does not include spaces or letter case variations.
 - Full Name** - required field. For ease of alphabetization, you can enter names in a "Last Name, First Name" format so that names can be easily sorted in the users pane.
 - Email Address** - optional field.
 - Password** - this case-sensitive field is optional. If left blank, a password is not required for this user to login.
 - Notes** - enter any notes to appropriately identify the user.
4. Click **Update** to add the new user.
5. Repeat this process until all of your users are added.

Configure Permissions

Since the Font Administrator default role is set for your only workgroup, all users will have the permission to perform most actions with the Type Client. Notable exceptions include the ability to access the Server Administration and Users and Workgroups web interfaces. Typically, these functions are accessed only by an IT professional. If you don't have a specific IT person, you may wish to enable the [Full Administrator](#) global permission for one or more users. Otherwise, it is best to use the System Administrator Super-user account to login to the Server Administration and Users and Workgroups web interfaces.

Configure User Settings

After adding users, you need to determine the most appropriate font replication mode, synchronization and personal workgroup settings for each user. These settings control when fonts are brought down from the server to the client, and how long those fonts remain on the user's system. Typically, the default settings will work for most users, but for certain users exceptions can be made. These are configured on the **Settings** tab for each user.

- The default [time between server syncs](#) should work for most installations. The exception may be a user who doesn't often need new or updated fonts. For these users, a longer synchronization interval can be set.
- The Font Replication mode controls when fonts are copied from the server down to the client machine. The default mode is **On-demand**, which gives users fonts only when they need to preview or activate them. The On-demand setting is typically the best choice for client machines that stay in

the office. For users who are working on laptops and may need to work offline frequently, set the [font replication mode](#) to **All**. This ensures that all fonts in the Type Server are downloaded to the client, and always available for use offline.

- Enable [personal workgroups](#) for users who need to add and activate fonts that they won't need to share with the rest of the workgroup. Server-based personal workgroups can be very helpful for users who work on multiple machines and need access to the same personal fonts on each machine. Otherwise, it's a good idea to have all users always add fonts to the main workgroup, and use sets to further organize fonts as necessary.

Add and Organize Fonts

Since all users have the ability to add fonts, you can now pass out the account access information to users and have users add fonts to the workgroup.

For the best organization within your workgroup, ask users to add fonts into sets that can then be shared with all users to keep everyone in sync.

For more information about adding, organizing, and managing fonts see the Universal Type Client User Guide and web help.

Opening the Users and Workgroups Administration Web Interface

Administrators manage users, workgroups, roles, and permissions using the Users and Workgroups Administration web interface. This interface can be accessed through any supported web browser.

To open the Users and Workgroups Administration web interface:

1. Open the Universal Type Client.
2. Choose **Server > Manage Users and Workgroups**.
The Users and Workgroups Administration web interface opens in the default web browser.
3. Enter a username and password and click **Login**.

or

1. Open a supported web browser.
2. 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).
For example: `http://10.1.2.32:8080`
or `http://localhost:8081` if administering the server locally.
3. Enter a username and password and click **Login**.

NOTE: If you login with the System Administration Super-user account, for the most secure configuration, [change the default System Administrator Super-user password](#) as soon after installation as possible.

NOTE: The default location to open the Server Administration interface is the same IP address, with the port number 8081. For example: `http://localhost:8081`

Changing the Display Language

The language of the Users and Workgroups Administration web interface is automatically set to the language your web browser is set to use. The web interface supports administration in English, French, German, and Japanese. If your preferred language is not supported, the interface defaults to English.

You can quickly change the display language by clicking your preferred language in the upper right corner of the page.

It's important to note that this only changes the language displayed in the Server Administration page. The client's user interface, as well as the Users and Workgroups Administration interface, remain in the language currently selected for that application.

Roles

Roles control the permissions in the Global and Workgroup permission tabs of each user. Roles are basically a group of permission settings that can be applied simultaneously to a user that affects their abilities in the workgroup.

Roles are dynamic in that when you change a role setting, all users who have that role in any workgroup are immediately affected. So, if you add or remove permissions to a role, be aware that everyone with that role setting will obtain updated permissions. User Roles are also quite powerful because they allow you to change the abilities of a large number of users in many workgroups at one time.

Defining a User Role Strategy

Roles and Workgroups

Roles allow administrators to quickly set up multiple users with a standard set of permissions. Even more speed is gained by applying a Default Role to a workgroup. That way, every user who is added to the workgroup receives that default role.

When organizing workgroups, you may want to organize fonts by what level of access that is required for users. Using this method, you can create your workgroups and assign a custom default role for each workgroup. This way, every user who is subsequently added to each workgroup is automatically assigned the default role. Users become almost secondary in this configuration.

For example, if a newspaper editorial department needs a specific group of fonts, yet those fonts are well-defined and these users won't need to choose new fonts, you can create a fairly restrictive role setting and set it as the default role for that workgroup. That way every user who is added to the workgroup will be restricted to using fonts as the administrator intends.

Users, Roles and Workgroups

A user's role can vary from workgroup to workgroup. A user may have the Font Administrator role in one workgroup, but only the Regular User role in another. After a user is added to a workgroup, that user's role can be changed as required. So, if the default role is set to Regular User, and you need this user to be the Font Administrator, you can change this setting in the user's Workgroup permissions tab.

It's also important to note that permissions set by role can be easily overridden on a user-by-user basis for each workgroup. So if a user needs one extra permission for a workgroup it is easy to set.

Roles and Fonts

It's important to note that font information is stored on a server-wide basis. So, any changes to attributes, such as keywords and foundry information, are applied across all workgroup. So, it is important that you choose roles and permissions for your users appropriately.

For example, a user has the Font Administrator role in one workgroup, but only the Regular User role in another. That user can make changes to font attributes in workgroup where he is a Font Administrator. If a font exists in both workgroups, any changes to a font that the user makes as the Font Administrator will also appear in the other workgroup.

Custom Roles

In most instances, the predefined roles that come with Type Server should meet most needs. If you need to set specific role settings, you can easily create a custom role.

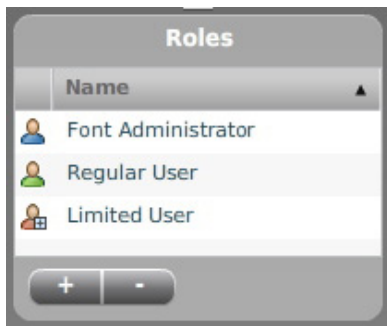
For example, a production environment could require special settings for everyone in the department. Those in the production department interface with outside clients, who supply fonts with their documents. These users

may need to add fonts to the database, as well as collect fonts for use on other systems. In this case you could create a "production" workgroup and an associated custom role for use with that workgroup. This custom role would have permissions that allow the addition and deletion of fonts, as well as the ability to collect fonts for output. The default role for the "production" workgroup would be set to use this new custom role. Now, all users who are subsequently added to the workgroup have the appropriate permissions for that workgroup. The administrator would never need to modify custom permissions for "production" workgroup users, because anyone who is added to the workgroup automatically has the appropriate permissions.

Predefined Roles

To facilitate a quick and easy setup, Universal Type Server contains three predefined user roles. These roles are configured with commonly used settings, and can be used as-is or a starting place to think about your own custom roles.

It's also important to remember that permissions may be granted that override role-based settings that are more or less permissive on a user-by-user basis.



Predefined roles cannot be modified. If you need slightly different settings, create a [custom role](#).

Regular User

The Regular User predefined role is configured for users who are mostly interested in finding and activating fonts. A regular user might not spend much time using the Type Client, and allow the auto-activation plug-ins to activate and deactivate fonts as required for each document and project.

Regular users can activate and deactivate fonts in workgroups for which they are members, apply keywords to fonts, and collect fonts for output.

The Regular User predefined role is the default role for workgroups in which a default role is not assigned. This means that any user added to a workgroup that does not have a default role set will automatically receive the Regular User role assigned for that workgroup.

Font Administrator

The Font Administrator predefined role is configured for users who need a higher level of control over fonts in a workgroup. Users who are required to add fonts, and perform other organizational tasks such as assigning keywords and creating shared sets, should have the Font Administrator role.

Those with the Font Administrator role can do everything the Regular User role can do as well as:

- Add and remove fonts.
- Create and delete shared sets.
- Modify shared sets.
- Create, delete and apply keywords, styles, classifications, foundries and font licenses.
- Activate fonts across multiple workgroups.
- Modify font family groupings.

Since roles are set by workgroup, users may be members of multiple workgroups yet are assigned the Font Administrator role in only a few workgroups.

It's important to note that if a font information is stored on a server-wide basis. So if a font exists in multiple workgroups, and a user has the Font Administrator role in one workgroup, any changes made to the font as the Font Administrator will also appear in every other workgroup.

Creating Roles

If you require roles not met by the predefined roles, you can easily create custom roles.

To create a new role:

1. [Open the Users and Workgroups Administration web interface.](#)
2. In the **Roles** pane, click the **Add (+)** button.



3. In the **Details** pane, enter a role name.
4. Enable or disable user [permissions](#) for the new role.
5. Click **Update** to save the new role.

Assigning Roles

There are a two ways to assign user roles within a workgroup:

- Using a workgroup's default role
- Changing the user's workgroup permission setting

Setting a Workgroup's Default Role

The easiest way to assign user roles is to have the workgroup do it for you. By setting a default role for a workgroup, that role is automatically assigned to each user subsequently added to the workgroup.

To set the default role for a workgroup:

1. [Open the Users and Workgroups Administration web interface.](#)
2. From the **Workgroups** pane, select the workgroup.
3. In the **Details** pane, click **Edit**.
4. Choose a role from the **Default Role** drop-down menu and click **Update**.

Existing members of the workgroup are not affected by the workgroup's default role change. Only users who are subsequently added are assigned the new default role.

Assigning Roles by User

After users are added to a workgroup, you can update each user's role on a workgroup-by-workgroup basis. This is often necessary if a user was given the default role when added to a workgroup, and you want to assign a different role.

To update the role for a user in a workgroup:

1. [Open the Users and Workgroups Administration web interface.](#)
2. From the **Workgroups** pane, select the workgroup.
3. In the **Users** pane, select the username.
4. In the **Details** pane, click **Edit**.
5. Select the **Workgroup** tab.
6. From the **Show Permissions in Workgroup** drop-down menu, if it is not already selected, choose the workgroup for which you need to modify the role.
NOTE: Only workgroups for which the user is a member are displayed.
7. Choose a new role from the **Role in Workgroup** drop-down menu.
8. Click **Update**.

Deleting a Custom Role

Depending upon your configuration, you may find that a custom role no longer suits your needs. Unlike the predefined Regular User and Font Administrator roles, custom roles can be deleted as necessary.

If a custom role is currently assigned to a user when deleted, that user's role in any relevant workgroup is immediately set to the Regular User predefined role. Any custom user permissions that are not role-based are retained by the user. This might cause a severe reduction in user permissions, yet provides the most security. Deleting a custom role can also be used as an efficient way to immediately revert a group of users to a more restrictive access level.

To delete a custom role:

1. [Open the Users and Workgroups Administration web interface.](#)
2. In the **Roles** pane, click to select the custom role to delete.
3. Click the **Remove (-)** button and click **OK** to confirm removal.

Workgroups

In Universal Type Server, fonts are organized into workgroups — collections of fonts intended for a specific job description, division, publication, or other grouping. Workgroups are like separate databases of fonts, each with its own group of users. The system administrator decides which users belong to each workgroup, and modifies user permissions on a user-by-user basis for each workgroup. To help facilitate setting user permissions, each workgroup has a default role, which sets the initial permissions for users added to the workgroup.

Users can be members of one or more workgroups, and a user's capabilities can vary from workgroup to workgroup. So, a user could be able to add and remove fonts in one workgroup but not in another.

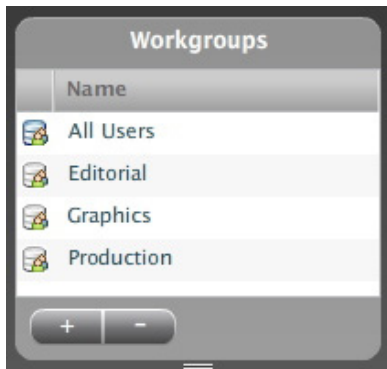
To maintain any existing organization you have for fonts, you can add collections of fonts to Universal Type Server as workgroups. For example, if your fonts are organized by department, you can create department-based workgroups. For example teams for each account, magazine division or publishing team could have their own workgroups. You can also create new workgroups using fonts already in other workgroups and you can change which fonts are in which workgroups.

Not to be confused with font sets — subsets of fonts within a workgroup— workgroups go beyond grouping fonts to controlling usage and access.

When you create users, you specify workgroups to which they belong. In many configurations, users will belong to only one workgroup (although they can simultaneously belong to and activate fonts in multiple workgroups).

For example, a magazine publisher may have three font workgroups — Editorial, Art, and Production.

- The **Editorial** workgroup contains fonts used in body copy. Writers and editors are members of this workgroup, and are given the permission to activate fonts, but aren't allowed to add, delete, or collect them.
- The **Art** workgroup contains all of the fonts that the company owns; the graphic designers can activate and add fonts, but they can't delete or collect them.
- The **Production** workgroup encompasses all of the company's fonts along with all of its advertisers' fonts. Users of this workgroup are given permission to add, delete, and collect fonts.



Some environments choose a simpler approach and only create one workgroup to which all fonts are added, and all required employees are added as users. In these environments, it's a good idea to create a custom role that allows users appropriate access to fonts, and set that role as the default for the workgroup.

Defining a Workgroup Strategy

Before you start creating workgroups of fonts, you need to decide how you want to structure them. Unlike the way you probably have been managing fonts — by font name, foundry, etc. — think more about who needs the fonts than about characteristics of the fonts.

For example, don't create workgroups based on font characteristics such as foundries or classes. If you do, most of the users will end up needing access to fonts in many workgroups, making access difficult to manage.

Users are able to sort fonts based on foundry and class in the Universal Type Client, so there is little need to organize fonts by foundry in separate workgroups.

Another important consideration when planning workgroups is that, in general, each document you design or output should use fonts from only one workgroup. So each workgroup should contain all the fonts necessary to complete the projects its users are involved in. Although users can belong to and open multiple workgroups, this can cause a great deal of confusion, especially if you have various versions of the same font in different workgroups.

It is easiest to select a [sample configuration](#) example and follow the detailed instructions for setting up your workgroups using one of these models. If your environment differs and requires a specialized configuration, spend a few minutes examining the fonts required in your environment as well as your user's font needs. Use the [workgroups worksheet](#) to help you plan and think through your configuration.

Creating and Editing Workgroups

New workgroups are created through the Users and Workgroups Administration web interface.

To create a workgroup:

1. [Open the Users and Workgroups Administration web interface.](#)
2. In the **Workgroups** pane, click the **Add (+)** button. This opens the **New Workgroup** details pane.
3. Enter a **Workgroup Name**. This is the name that is displayed to users who are members of the workgroup.
4. Choose a **Default Role** from the drop-down menu.
The default role is set for users when they are added to the workgroup. When used properly, the default role can make adding users and configuring permissions for a workgroup a snap.
5. Enter any **Notes** to help you identify the fonts that will be contained in this workgroup. Notes are only visible in the Users and Workgroups Administration web interface, and are not visible in the client.

After creating a workgroup, the next step is to add users to that workgroup. After adding users, those who have the appropriate permissions can add fonts to the workgroup using the Universal Type Client. It's important to remember that anything to do with the physical manipulation of fonts is performed using the Type Client.

After creating a workgroup, you may find that there's another name that more accurately describes the workgroup. You can easily change this as well as the default role after a workgroup is created.

To edit an existing workgroup:

1. [Open the Users and Workgroups Administration web interface.](#)
2. In the **Workgroups** pane, select the existing workgroup.
3. In the **Detail** pane, click **Edit**.
4. Change the workgroup name and/or default role and click **Update**.

NOTE: Any changes to the default roles affect only users subsequently added to the workgroup, and do not affect users who are currently members of the workgroup.

Deleting a Workgroup

When a workgroup no longer serves a purpose, you can delete it. It's important to understand what happens to fonts contained within a workgroup when it is deleted.

- The users assigned to that workgroup remain in Universal Type Server.
- The workgroup is removed from the list in the Universal Type Client as well as from the Users and Workgroups Administration interface.
- If users have fonts from the workgroup active, the fonts stay active until the users shut down their computers or choose **Server > Forget Connection**.
- If fonts in the deleted workgroup belong to other workgroups, they remain in the Type Server datastore.

- If fonts in the deleted workgroup were exclusive to that workgroup, the fonts are deleted from the server entirely.
- All font sets within the workgroup are deleted.

To delete a workgroup:

1. [Open the Users and Workgroups Administration web interface.](#)
2. In the **Workgroups** pane, select the workgroup name.
3. Click the **Delete (-)** button
4. Click **OK** to confirm.

The "All Users" Workgroup

As its name indicates, the All Users workgroup displays a list of all of the users who have access to the Universal Type Server.

All users belong to this workgroup, even if they are not a member of any other workgroup. However, to have access to server fonts, a user must be a member of a workgroup that contains fonts. The All Users workgroup does not contain any fonts, and is never visible in the Type Client.

Most importantly, this All Users workgroup includes the System Administrator Super-user account under the name "administrator." The All Users workgroup is the only location from which the Super-user can change his or her password.

The All Users workgroup cannot be deleted.

NOTE: You must login as the Super-user in order to modify the Super-user password.

The All Fonts Workgroup

The All Fonts workgroup displays all of the fonts contained in all of the Universal Type Server workgroups. The All Fonts workgroup functions as follows:

- **Viewing all fonts** - The All Fonts workgroup does not appear in the list of workgroups available in the Users and Workgroup Administration web interface. Only Full Administrators are able to view the All Fonts workgroup in the Universal Type Client.
- **Adding fonts** - Fonts are not added directly to the All Fonts workgroup. A font must belong to any other workgroup to remain in the All Fonts workgroup. If the only instance of a font is removed from another workgroup, then it is removed from the Type Server database. In this sense, the All Fonts workgroup is a virtual workgroup.
- **Deleting fonts** - If a font is removed from the All Fonts workgroup, it is subsequently removed from all other workgroups. This is a good way for Full Administrators to remove outdated fonts from the workflow and prevent future use.
- **Duplicate handling** - There are no true duplicates in the All Fonts workgroup. Fonts can have the same name, but if they are different versions, foundries, and so forth they are not considered a true duplicate. Only one copy of a the font is retained. Each font can belong to as many workgroups as necessary. For example, if a magazine's body copy is always in Concorde Nova, this font would be added to all of the workgroups in the Type Client. Behind the scenes, the Universal Type Server is serving the identical font to all users of each workgroup.

Workgroups Worksheet

Workgroup name:	
Default role:	
Users in workgroup:	
Fonts in workgroup:	
Notes:	

Users

A user is any individual who needs to connect to Universal Type Server to access fonts. Each user will have his own unique account name, settings and permissions.

You can add as many users as required to the Type Server, regardless of how many user connections you have purchased. Your license simply controls how many concurrent connections are allowed to the server.

Therefore, you can create a user for anyone who needs access to fonts— every full-time employee, part-time employee, intern, client, etc.

When creating users, the administrator specifies all basic user login information: username, full name, email address, password, and so forth.

After the user is created, users are then added to workgroups. When a user is added to a workgroup, the user is automatically assigned the default role in that workgroup. The default workgroup role sets a wide variety of user permissions, and is handy for quickly setting consistent permissions for all users in a workgroup. If special user permissions are required, they can be set globally for that user or on a workgroup-by-workgroup basis.

User logins can be used with the Universal Type Client on either Mac OS X or Windows. The client is only able to use font files that are compatible with the current operating system, so users who work on both platforms may have different fonts available for use. For example, Windows-based PostScript fonts are not compatible with the Mac OS, so these fonts cannot be activated or collected by the Mac OS client.

NOTE: To prevent confusion, control access, and aid in troubleshooting, do not give multiple users the same account name. For example, if you give all graphic designers the account name “Creative,” it will be difficult to determine who just added an unlicensed font. In a 24/7 environment, be sure to have a different account name for each user.

Creating and Editing Users

Users can be added by Full Administrators and the System Administration Super-user.

To create a new user:

1. [Open the Users and Workgroups Administration web interface](#)
2. In the **Workgroups** pane select a workgroup to which you would like to add a user.
To add a user without specifying a workgroup, select the **All Users** workgroup.
3. In the **Users** pane, click the **Add (+)** button.
4. In the **New User** details pane, in the **Account** tab, enter the basic account information:
Account Name - Each user account name must be unique. It's best to use an account name that is short, easy to remember, and does not include spaces or letter case variations.
Full Name - Required field.
Email Address - Optional field.
Password - Optional field. If left blank, a password is not required for this user to login.
Notes - Enter any notes to appropriately identify the user. This information is only visible in the Users and Workgroups Administration web interface.
5. Click **Update** to add the new user.

After creating a new user, add the user to workgroups as required.

Typically, default user settings are all that is required for most users. The appropriate user permissions are configured by the default workgroup role when you add this user to a workgroup. Although many settings and permissions options are available to modify on a user-by-user basis, it's likely that you will never need to do so.

You can edit the user account information, settings, and permissions after the user is created.

To edit an existing user:

1. [Open the Users and Workgroups Administration web interface](#)
2. In the **Workgroups** pane select any workgroup to which the user belongs.
3. In the **Users** pane, select the user to edit.
4. In the **Details** pane, click **Edit**.
5. Update any of the user account information, settings and permissions.
6. Click **Update**.

Adding Users to Workgroups

For a user to have access to fonts in a workgroup, the user must first be added to the workgroup. New users can be added directly into a workgroup when the user is created, or for users who already exist in the Type Server, the username can simply be dragged into the new workgroup.

To add an existing user to a workgroup:

1. [Open the Users and Workgroups Administration web interface](#)
2. In the **Workgroups** pane, select the **All Users** workgroup, or any other workgroup to which the user currently belongs.
3. From the **Users** pane, click and drag the username into any other workgroup. The user is automatically assigned the default role in the new workgroup.
4. As required, you can now edit the user's permissions for the new workgroup in the **Workgroup** tab.

Importing Users from LDAP or Active Directory

Importing users from an LDAP or Active Directory server is a good way to create an initial list of users in Universal Type Server, and can save you a lot of time.

This import feature is currently supported for use with:

- Microsoft Active Directory 2003
- LDAP v3

It is important to note that this procedure does not create an active link between the LDAP server and Universal Type Server. This functionality is merely an import feature and Type Server data will need to be updated independently from your LDAP user data.

The import process relies heavily upon your specific LDAP/Active Directory configuration. See your LDAP administrator for the appropriate settings for your environment.

NOTE: You may want to validate your import settings with a custom third party LDAP tool before importing users. For example: LDAP Explorer Tool, <http://sourceforge.net/projects/ldaptool>

To import a list of users from and LDAP or Active Directory:

1. [Open the Users and Workgroups Administration web interface.](#)
2. Click the **Import** link.
3. Click **Import users from LDAP/AD server.**
4. Enter the IP address of the LDAP server into the **LDAP/AD Server address** field.
5. In the **Account name** and **Password** fields enter the LDAP account information that allows access to the LDAP server.
NOTE: This account name and password are unique to the LDAP server, and are not related to any of the administration accounts in Universal Type Server.
6. In the **Search base** field enter the LDAP tree including the common name (CN) and domain component (DC) information of your LDAP server. Each parameter is separated by a comma and should be entered in ascending order from the specific to the general. For example: `CN=Users,DC=testmachine,DC=mycompany,DC=com`
7. The search filter is used to refine the data being pulled from the LDAP server. This is typically used to ignore all non-user LDAP objects for the data import. So, in the **Search filter** field enter the object class from which to pull user data. For example:
`objectClass=User`

8. The remaining fields in the import window define how user account settings are mapped from the LDAP server into fields in Universal Type Server. These fields typically map to the common names used in LDAP installations. For example:
 - User account name attribute** is set to `dn` denoting the LDAP user's distinguished name.
 - User full name attribute** is set to `cn` denoting the LDAP user's common name.
 - User email attribute** is set to `email`.
 - User password attribute** is set to `password` or `auth-key`.
 - User notes attribute** is set to `description`.
9. Click **Search LDAP/AD server for users**.
10. A list of users is displayed. At this point you can click **Modify LDAP query** to return to the LDAP server information window and refine your search parameters.

To continue importing users, you can select which users to import by enabling and disabling them with the import checkbox.

You can also edit account data before it is imported into Universal Type Server. Editing fields in this dialog does not affect a user's LDAP account data; it only affects the user's account data in Universal Type Server.

By default, the **Notes** field contains the text "Imported from LDAP/AD" to help you easily identify users who were created through the import process.
11. Click **Import selected users** to finish the import process. The selected users are added to the **All Users** workgroup.

The import process can be run as many times as needed to add new users. Universal Type Server allows unique account names only. During subsequent import processes, any account name that already exists in the Universal Type Server database is skipped and no new information is added for that user, only new users are added.

Settings

User settings control a number of options about how users are given access fonts, as well the enabling of administration privileges. This includes:

- The [Is Full Administrator](#) setting allows users to access the "All Fonts" workgroup as well as access the Server Administration and Users and Workgroups Administration web interfaces.
- The [Time between server syncs](#) setting controls how often fonts are downloaded, or synchronized with the Type Server.
- How fonts are stored on the client's system is controlled by the [Font Replication Mode](#) setting.
- [Personal font workgroups](#) are enabled through user settings.
- The ability to change the user's own [password](#) is a user setting.

The Full Administrator Setting

The **Is Full Administrator** setting allows a user to perform most of the server administration tasks through both the Server Administration web interface and the Users and Workgroups Administration web interface.

For each Type Server, typically only one or two users will have the **Is Full Administrator** setting. Full Administrators can perform all administration functions, yet cannot create other Full Administrators. The **Is Full Administrator** setting can only be set by the [System Administrator Super-user](#).

Full Administrators are users who are primarily responsible for the high-level workgroup and user organization, and are likely members of the IT department.

The **Is Full Administrator** setting allows a user to:

- Access and use all administration tools from the Server Administration web interface.
- Create and delete users in any workgroup.
- Modify permissions and settings for any user in any workgroup.
- Rename and regroup font families.
- Delete any sets that have been shared by other users.

Synchronization

To keep all of the fonts, font attributes, and user permissions current in all Universal Type Clients, the client synchronizes data with the server on a periodic basis.

How often each user account synchronizes with the Universal Type Server is controlled by the **Time between server syncs** user setting. This setting is adjustable so that administrators can help minimize network traffic while ensuring that all clients are kept up to date.

Synchronization takes place only while the client is connected and working online with the Type Server. After working offline, the client automatically synchronizes with the server, downloading all attribute changes and permissions. Fonts are downloaded to the client based on each user's [Font Replication Mode](#).

The synchronization interval for each user can vary based on that user's needs. For example all users of a production department may work on the same project at the same time. All of these users will need the same fonts at the same time, so a very short synchronization interval would benefit this environment. Alternately, a copy editor who works on just a few projects with a fairly static group of fonts would not need to be constantly synchronizing with the server. A longer interval, perhaps daily, would be more appropriate for this user.

A more frequent synchronization setting can create unnecessary network traffic and potentially slow down your network. So, set your synchronization frequency to the a longer interval to keep network traffic to a minimum.

Font Replication Mode

The **Font replication mode** setting controls when fonts are downloaded to the client system. Font replication is important to understand to keep your network traffic to a minimum and to maintain healthy server performance.

Depending upon the type of use that you expect, and to minimize network traffic, each user may have a different replication mode.

- **All** - This replication mode automatically downloads all fonts from the workgroups to which the user is a member. 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 they are required. Previewing, activating and collecting fonts initiates the download of selected fonts to the client machine. 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.
- **On-Demand Local Cache** - This replication mode downloads fonts to the client as they are requested. Previewing, activating, and collecting fonts all initiate the download of a font. After being downloaded from the server, fonts are not removed and remain in the Type Client cache. Cached fonts are available for activation, preview, and collection while working offline.

Font Replication and Licensing Issues

The font replication mode that you choose can be affected by how you expect to account for the licenses for your purchased fonts. Fonts are each small pieces of software, each with their own license. You may have purchased fonts as part of a large library or one at a time. Either way, you need to be sure that you're using fonts in a way that you aren't compromising the font's license.

- The **All** replication mode downloads all workgroup fonts to a user's system. Each and every font in workgroups to which the user is a member is always downloaded to the user's system, and thus may require a license for that font file.
- The **On-Demand** replication mode only downloads files to a user's system when they are required. When the font is no longer in use, it is removed from the system and no longer consumes a font license.
- The **On-Demand Local Cache** mode only downloads fonts as requested. So, if a user has previewed or activated a font, it is considered in-use by the system, and consumes a font license at that point. Since fonts are not removed from the user's system, all fonts remaining on the user's system continue to consume licenses.

Personal Workgroups

At the discretion of the administrator, users can add fonts to their own personal workgroup. Personal workgroups can be either server-based or client-based.

- **Server-based personal workgroups** are available on any machine that the user logs in to. This is a good setting if you want to be sure that personal workgroups are available from any machine where the user logs in, and to ensure that there is always a backup of personal workgroup fonts on the server.
- **Client-based personal workgroups** are housed only on a single machine so the fonts contained within these workgroups can vary from machine to machine for the same user account. Client-based workgroups have the advantage that if a user attempts to add corrupt fonts, the corrupt fonts are placed into a "corrupt fonts" set within the client-based personal workgroup.

Personal workgroups are useful when experimenting with fonts for which you may only have a single license. For example, say a graphic designer who is working on a new client's identity is experimenting with fonts that are not part of the company's licensed font library. The designer believes the fonts are ideally suited to the job and the administrator does not want to squelch the designer's creativity. But, since the company doesn't yet own a large number of licenses for this font, you don't want to add them to the server for an entire workgroup to use. The solution is to have the designer add the fonts to his or her personal workgroup. If the client approves the fonts, you can purchase additional licenses and add the fonts to the appropriate workgroups.

Access to a personal workgroup is a user-based permission, so some users might have them while others do not. For example, graphic designers are likely to need a personal workgroup, but editors are not. Since the fonts are for private use, users can add, delete, activate, add attributes and collect for output from their personal workgroup.

NOTE: Personal workgroups are provided for special cases in which graphic designers absolutely need to use certain fonts right away. Since the use of personal workgroups limits the administrator's control over who uses which fonts, they are not recommended for general, everyday use.

WARNING: Changing the personal workgroup setting after a user has already added fonts and sets to that workgroup will result in the deletion of all existing fonts and sets in that user's personal workgroup. It is best to set the personal workgroup setting when adding a user and not modify it after a user has started to work with the personal workgroup.

Change Password

The Change Password setting allows the user to update their password directly from the Universal Type Client by choosing **Server > Change Password**.

Alternately, Full Administrators can change a user's password directly through the Users and Workgroups Administration web interface.

Activate Fonts Across Workgroups

All users are able to simultaneously activate fonts in any workgroups to which they are a member. The Activate Fonts Across Workgroups setting applies only to the auto-activation plug-ins installed on the client's system.

The Universal Type Server plug-ins are typically limited to activating fonts from a single workgroup. When the user launches an application for which the Type Server plug-in is enabled, the user is prompted to select a workgroup of fonts to use for auto-activation. Enabling this permission allows the plug-ins to activate fonts from workgroups to which the user has access and are enabled in the plug-in.

Due to the fact that you can't guarantee that all users will have access to all fonts, it is best to design documents to only use fonts from a single workgroup. This way you can guarantee that all users of that workgroup will have the fonts necessary for the document. The risk of enabling this feature is that a user could unintentionally create a document that uses fonts from multiple workgroups.

Permissions

Permissions control what a user is allowed to do in workgroups. Permissions can be set globally, so that they affect all workgroups for a user, or on a workgroup-by-workgroup basis.

Permissions control the ability to:

- Add and remove fonts
- Collect fonts for output
- Create, delete and modify shared sets
- The ability to create, delete and apply attributes to fonts

In most cases, it is best to allow permissions to be set by the user's role within each workgroup. Yet, for some users, you will need to specifically edit user permissions. Typically, you will need to edit permissions for users who need extra abilities within a workgroup. For example, in a workgroup where all users are given the Regular User default role, you may want to give one user responsibility for creating and applying font licenses. To do so, for this user the administrator would grant the **Create and Delete** and **Apply to Fonts** permissions for **Licenses**.

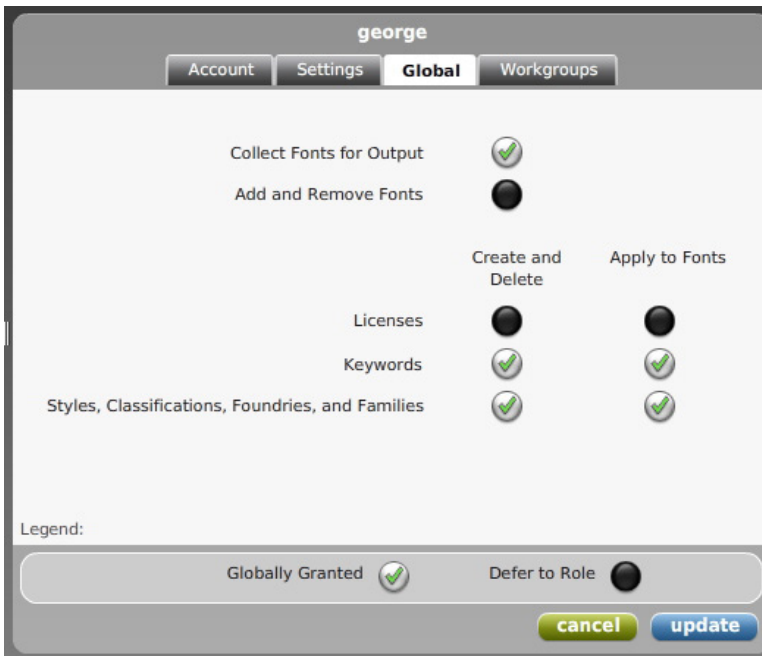
Global Permissions

Global permissions grant users permission to perform actions across all workgroups to which the user has access.

All global permissions are set by the user's role within each workgroup, and using roles is the recommended method for applying user permissions.

Though, there may be some instances where you want to globally grant a single user extra responsibilities across all workgroups. For example if you have a user who will be primarily responsible for collecting fonts from multiple projects for archiving, the administrator would enable the **Collect Fonts for Output** global permission for that user.

Globally granted permissions override any permissions set by a user's role in the workgroup, as well as any custom workgroup permissions.



Global permissions include font-based permissions as well as font attribute permissions.

Global font-based permissions include the ability to:

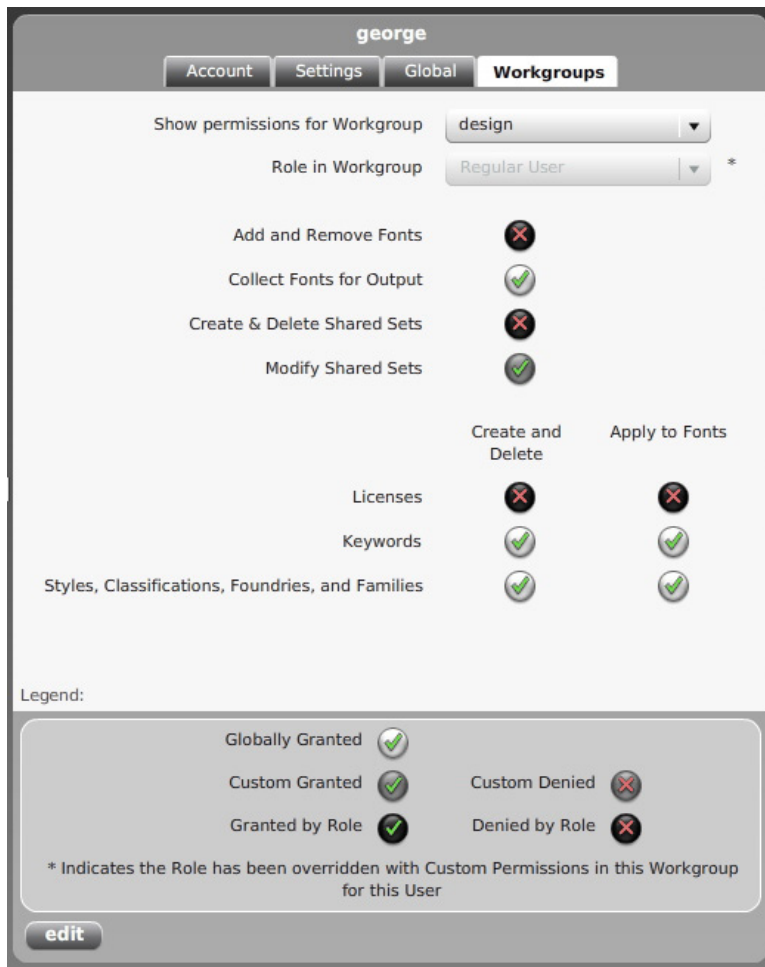
- Collect Fonts for Output
- Add and Remove Fonts

Font attributes are only stored within Universal Type Server and never applied to the source font file. Font attributes include all font licensing, keywords, styles, classifications, foundries and font family information. Administrators can grant or deny the ability to create, delete, and apply:

- Licenses
- Keywords
- Font Attributes

Workgroup Permissions

Workgroup permissions are permissions that are restricted to a specific workgroup. Administrators can use this tab to grant or deny permissions for each user on a workgroup-by-workgroup basis.



Permissions on the Workgroup tab are broken down for every workgroup to which the user belongs. Use the **Show permissions for Workgroup** drop-down menu to change which workgroup permissions are displayed.

All of the workgroup-based permissions can be set by the user's role in the workgroup, although custom permissions can be granted or denied.

NOTE: If a permission is granted or denied in the **Global** permissions tab, it cannot be modified in the **Workgroup** tab.

Use the **Role in Workgroup** drop-down menu to select the user's role for the workgroup displayed in the **Show permissions for Workgroup** menu above.

A **star (*)** displayed next to the Role in Workgroup drop-down menu indicates that there have been custom workgroup permissions applied in the Workgroups tab. This is an easy way to see if the workgroup permissions are different than the default role permissions.

Font-based permissions can be granted or denied on a workgroup level. These include the ability to:

- Collect Fonts for Output
- Add and Remove Fonts

All users can create their own sets within a workgroup. For sets to be visible to other users, the set must be shared within the workgroup. As an example, you may want to allow a user to create and delete shared sets, for a workgroup, but restrict their ability to modify the shared sets from other users. Shared set permissions include:

- Create and Delete Shared Sets
- Modify Shared Sets

Font attributes are only stored within Universal Type Server and never applied to the source font file. Font attributes include all font licensing, keywords, styles, classifications, foundries, and font family information. Administrators can grant or deny the ability to create, delete, and apply:

- Licenses
- Keywords
- Font Attributes

Role Based Permissions

The following permissions can be granted or denied to each user on a workgroup-by-workgroup basis. A user's role for each workgroup is set in the Workgroup permissions tab of the Users and Workgroups Administration web interface.

Role-based permissions can be overridden, allowing the administrator to grant or deny permissions globally for a user, or on workgroup-by-workgroup basis for each user.

Each permission has a three-state check box that switches between the role permission and whether the permission is custom granted or denied. If a permission is granted globally, it cannot be modified in the Workgroup tab.

Permission	Granted by Role	Denied by Role
Add and Remove Fonts	✓	
Collect Fonts for Output	✓	
Create & Delete Shared Sets	✓	
Modify Shared Sets	✓	
Licenses		✗
Keywords	✓	
Styles, Classifications, Foundries, and Families	✓	

Legend:

Granted by Role ✓ Denied by Role ✗

cancel update

Add and Remove Fonts

This permission allows the user to add font to and remove fonts from a workgroup. This is an important responsibility, because if a font is removed from a workgroup, and if it doesn't belong to any other workgroup, it is immediately removed from the Type Server. Enable this permission for users who are aware of this responsibility.

Collect Fonts for Output

This permission allows users to export fonts from the Type Server to a location outside of the server. Users may need to do this when sending a project from one company location to another.

NOTE: It's important to note that fonts are individual pieces of software, and each font has specific font licensing requirements. Only collect and provide fonts to others whom you know have purchased the appropriate font licenses.

Create / Delete Shared Sets

All users can create and modify their own sets in all workgroups for which they are a member. The sets are associated with each username and are therefore available only to that user.

To allow the user to share a sets with the entire workgroup enable the **Create / Delete Shared Sets** permission. This can be helpful when users are creating a group of fonts to be used with a project. When the user finalizes the set and wants to bring others onto the project they share the set with the entire workgroup. So, in general, reserve this permission for project leaders.

Enabling this permission also allows the user to unshare any set that they have shared, making it unavailable to others in the workgroup. The owner can also delete any sets that they have shared.

Modify Shared Sets

Enabling the **Modify Shared Sets** permission allows the user to add and remove fonts from all shared sets, as well as rename any shared set. The user can modify any shared set, including those created by other users.

Font attribute options

Font attributes are only stored within Universal Type Server and is never applied to the source font file. Font attributes include all font licensing, keywords, styles, classifications, foundries and font family information. Administrators can grant or deny the ability to create, delete and apply:

- Licenses
- Keywords
- Font Attributes

Font Attribute Options

Controlling font attributes helps organize fonts. Font attributes includes font licenses, keywords, styles, classifications, foundries, and family information. Font attributes are stored only within Universal Type Server and in no way affects your original font files, so attributes are helpful for organizing and finding files. For example, keywords can be added to all fonts used for a project, client or print job. Fonts can later be found using this information.

Administrators can set these permissions using three methods:

- Set by the user role
- Custom granted or denied in a user's Global permissions
- Custom granted or denied in a user's Workgroup permissions

All permissions can be set so that the user can create and delete attributes, or merely apply that item to fonts. For example, you might have one person who creates your list of keywords, yet everyone might have the ability to apply keywords to fonts.

Styles, Classifications, Foundries, and Families - Enable this permission for users who need to modify Styles, Classifications, Foundries and Families. Typically these users create fonts or are those who absolutely know which foundry fonts came from. Enabling this permission also allows users to change how the Type Client displays font family information. For example, if you believe that a font would better belong in another family group, you can drag that font file to another family.

Licenses - Enabling a user to create and delete licenses allows that user to access the Licenses dialog box in the Type Client. Font licenses can be applied to specific fonts in the database so that you can track your font usage and compliance. For example, if you purchase 20 licenses of a font foundry's library, you can create a 20 user license and then apply it to all of the fonts that are part of that font library.

Keywords - Keywords are a good way to track fonts. You can create a keywording strategy that helps you track which fonts are used for specific projects or clients. As with the example used above, you may only have a few users who can create and delete keywords, but many users who are able to apply them to fonts.

The System Administrator Super-user

There is only one System Administrator Super-user account per Universal Type Server installation. The Super-user can perform any administrative task from the Server Administration and Users and Workgroups Administration web interfaces as well as any task in the Universal Type Client.

Most importantly, the Super-user is the only user account that is able to assign or remove the [Full Administrator](#) setting, and cannot be deleted from the server.

Typically, the only time the Super-user account is used is during the initial configuration of the Type Server, and when you need to add or remove users with the Full Administrator setting.

The Super-user username is always set to **"administrator"** with the default password **"password"**. For optimal security, change your default super-user password as soon as possible after installation.

WARNING: Do not lose the super-user password! This is the **only** username and password that cannot be reset or recovered. If you do lose your Super-user password, please contact Extensis [technical support](#) for assistance.

Changing the Administrator Account Password

After installing the server, for security reasons, it is very important to change the password for the System Administrator Super-user account. This account has access to all of the functions of the Universal Type Server and can delete and change all users and workgroups. It is important to keep this account login secure.

Until other users are created, the Super-user account is the only account with access to the Users and Workgroups Administration interface.

To change the administrator password:

1. [Open the Users and Workgroups Administration web interface.](#)
The default administrator login credentials are:
username: **administrator**
password: **password**
2. In the **Workgroups** pane, click the **All Users** link.
3. In the **Users** pane, select the **Administrator** user account.
4. In the **Details** pane, select the **Account** tab and click **Edit**.
5. Enter a new password in the **Password** field and click **Update**.

WARNING: Do not lose your System Administrator Super-user password! This is the most important password for your entire system and cannot be easily retrieved or reset.

User Worksheet

Account Data	
Account Name:	
Full Name:	
Email Address:	
Password:	

User Workgroups	
Workgroup	Role in Workgroup

Account Settings	
Is Full Administrator	
Change Password	
Activate Fonts Across Workgroups	
Time between server syncs	
Font Replication Mode	
All	
On Demand	
On Demand Local Cache	
Has Personal Workgroup	
Server Based	
Client Based	

Global Permissions		
Collect Fonts for Output		
Add and Remove Fonts		
	Create and Delete	Apply to Fonts
Licenses		
Keywords		
Styles, Classifications, Foundries, and Families		

Deleting Users

When a user no longer needs access to served fonts, you can safely delete their user account from Universal Type Server.

If you think that the user will need access in the future, you may wish to leave their account active, yet remove them from all workgroups. Removing a user from all workgroups prevents them from getting any fonts from the server, yet the user will still be able to use any fonts in their personal workgroup. Though, it is important to note that the user still consumes a license.

If you need an additional user license for others to access Type Server, you can force the user to disconnect, and remove the user account. To force user disconnection, click the Users link in the Server Administration web interface. For complete details, see Server Administration User Guide and web help.

To remove a user account:

1. [Open the Users and Workgroups Administration web interface.](#)
2. Select the **All Users** workgroup.
3. Select the user account name and click the **Remove (-)** button in the Users pane.
4. Click **OK** to confirm the account removal.

About Extensis

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Documentation Feedback

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

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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