© Extensis[®] **Universal**TypeServer[®]

SERVER ADMINISTRATION QUICK START GUIDE





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Welcome to Universal Type Server

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. Meanwhile, the Universal Type Client[™] provides users the correct, approved fonts for their projects.

About this Guide

This guide covers the very basic quick installation and configuration of Universal Type Server. These instructions only cover one common installation and configuration. Your setup may vary based on your user needs, hardware configuration and other options.

For details about server configuration options and workgroup settings, please see the Server Administration Guide and the User Management Guide, available from the Product Support page (*http://www.extensis.com/support/product-support/universal-type-server-6/*).

Overview

Here is a high level overview of the steps required to get started with Universal Type Server.

- 1. Install Universal Type Server
- 2. Create Workgroups and Set Server Defaults
- 3. Create Users and Add Them to Workgroups
- 4. Install Universal Type Client
- 5. Add Fonts

The details of each of these high-level steps are spelled out in this guide.

Install Universal Type Server

Verify server system requirements

Before installation, ensure that your server meets all of the minimum system requirements.

For the most up-to-date information about the latest release of Universal Type Server, please visit the Product Support page (*http://www.extensis.com/support/product-support/universal-type-server-6/*).

Universal Type Server can be installed on a system running either OS X or Microsoft Windows Server.

Macintosh Server

- macOS[™] v10.8 through 10.12 (Sierra)
- 2.0 GHz or faster processor
- 2 GB RAM
- 2 GB available hard drive space for application files, plus additional space for fonts

Windows Server

- Windows® Server 2008 R2, Windows Server 2012, Windows Server 2012 R2, or Windows
 Server 2016
- 2.0 GHz or faster multi-core processor
- 2 GB RAM
- 2 GB available hard drive space for application files, plus additional space for fonts

Server Administration and User Management

Requirements for any computers that will be used for Server Administration or User Management. These applications can be run remotely.

- Internet Explorer 10 or later or Microsoft Edge (for administering the server from Windows), Safari 7 or later (for administering the server from a Macintosh), or the current release of Firefox 15 or Chrome.
- An Internet connection and one of the above browsers to view Help.
- The current release of Adobe Flash® Player.

SQL Database for Enterprise Edition

- MySQL 5.5 or newer (Macintosh or Windows)
- Microsoft SQL Server 2012 or 2014 (Windows)

Directory Services configuration

- Active Directory on Windows Server 2003, 2008, 2012, or 2016
- Open Directory on macOS Server v10.8 through 10.12

New installation

If you are installing Universal Type Server for the first time:

- 1. Download the current installer from the Product Support page
 - (http://www.extensis.com/support/product-support/universal-type-server-6/).
- 2. Copy the installer onto the server's hard disk.
- 3. Double-click the installer icon and follow the on-screen instructions.

Upgrading from an earlier version

Before proceeding with any of the processes below, you should back up your Universal Type Server datastore (follow the instructions in the Server Administration help system). Store the backup in a safe place.

You should also consider backing up the computer where Universal Type Server is installed.

Universal Type Server 6

System requirements and installers are available from the Product Support page (*http://www.extensis.com/support/product-support/universal-type-server-6/*).

Universal Type Server 5

System requirements and installers are available from the Universal Type Server 5 support page (*http://www.extensis.com/support/product-support/universal-type-server-5/*).

The upgrade process

If you are running Universal Type Server 5.x on OS X 10.8 or later, or on Windows Server 2008 R2, 2012, or 2012 R2:

You can upgrade to Universal Type Server 6 directly.

If you are running Universal Type Server 5 on a different operating system:

You can either upgrade your current system to meet the system requirements for Universal Type Server 6, or you can move your data to a new system.

To move your data to a new system, back up the datastore, then restore it to the new system from within the Universal Type Server 6 Server Admin application.

For details, see the online help in the Server Admin application, or the Server Admin Guide.

If you are running Universal Type Server 4 on OS X 10.8 or later, or on Windows Server 2008 R2, 2012, or 2012 R2:

If your system meets the rest of the Universal Type Server 6 System Requirements, then you can upgrade in a two-step process. First, backup your existing datastore following the instructions in the online help. Next, update your system to Universal Type Server 5 and run the Universal Type Server 5 Server Admin application to make sure your data is intact. Finally, update your system to Universal Type Server 6.

If you are running Universal Type Server 4 on a system that does not meet the Universal Type Server 6 system requirements:

You can either upgrade your current system to meet the system requirements for Universal Type Server 6, or you can move your data to a new system.

If you upgrade your current system, you will need to update to Universal Type Server 5, then update to Universal Type Server 6, as described above.

If you move to a new system, you will need to install universal Type Server 5, restore a backup of your current datastore, then update to Universal Type Server 6.

Log in to the Server Administration application

After the installer runs, the installation application automatically starts your web browser and opens Server Administration. Bookmark this page in your browser for easy access in the future.

Log in using the default Server Administrator username and password:

- Default username: administrator
- Password: password

Note: You should change the default administrator password in Users & Workgroups Management before adding any other users to the Type Server. We'll show you how later in this document.

In the future, to manually open and log in to Server Administration:

- 1. Open a supported web browser.
- 2. In the address field, enter your server IP address followed by a colon and the port number. The default server administration port is 18081. For example: http://192.168.0.1:18081 or http://localhost:18081.
- 3. Enter the administrator's username and password.

Serialize Universal Type Server

Universal Type Server is licensed on a concurrent use model. This means that the server tracks how many clients are logged in to the server at the same time. When you add your serial number to the Type Server, it records the number of client connections allowed. (The Universal Type Client application does not require a serial number.)

STATUS	Licenses		
SETTINGS SYSTEM	Feature	Date Entered	Serial Number
	Font Server Professional Edition with 10	4/7/14	1982-1012-0102-0214-2012-0010
USERS	seats Font Server		
DATASTORE DATABASE	Enterprise Edition	4/7/14	1000-1110-4419-4811-1003-0048
MOVE/NEW BACKUPS	CoreClient with 10 seats	4/7/14	1282-2422-8722-2802-8802-8829
SCHEDULE BACKUPS			
LICENSES »			Remove Selected Licenses
HELP	Add Serial Number:		Add Serial Number
LOGOUT	Additional licenses m <u>http://www.extensis.</u>		sed from Extensis.

To serialize the Type Server:

- 1. In Server Administration, click the *Licenses* link on the left.
- Enter a valid Universal Type Server serial number into the field. If you are installing a trial version of Universal Type Server, enter the demo serial number that you received in your email.
- 3. Click [Add Serial Number].
- 4. If you have an Enterprise Module license, enter that serial number and click [Add Serial Number].

You must enter a Pro license number before you enter an Enterprise license.

5. If you have a license for Type Core Clients, enter that serial number and click [Add Serial Number].

You must enter an Enterprise license before you enter a Core Client license.

User connection settings

Each client needs specific server information to connect and use fonts. In addition to their username and password, users will need the following Type Server information to log in:

- The IP address or DNS name of your Type Server.
- The Web Service Port of your Type Server. The default is 8080.

Once your users are connected, they won't usually need to enter this information again.

You can also set a Bonjour name for your Type Server, and have users select it from a list. Bonjour names are easier for users to remember.

STATUS	System
SETTINGS SYSTEM » PORTS	Running state: started +
LOGGING	Access state: normal 💠
USERS	
DATASTORE DATABASE MOVE/NEW BACKUPS SCHEDULE BACKUPS	Autostart: enabled + Bonjour Name: Universal Type Server Note: Server must be restarted for Bonjour Name to be updated.
LICENSES	
HELP	Update server
LOGOUT	

To set the Bonjour name of your Type Server:

- 1. In Server Administration, click the *System* link under *Settings* on the left.
- 2. In the Bonjour Name field, enter a new name for your server.
- 3. Click [Update Server].
- 4. To apply the changes, restart Universal Type Server (see Restart Universal Type Server on the next page).

A note about firewalls

Universal Type Server needs two ports to be open in any server firewall software.

The required ports are the Web Admin Port for Type Server administration, and the UTS HTTP / Web Service port for Type Client connections. The port numbers are listed on the Settings:Ports page of Server Administration.

Open these two ports in your firewall before proceeding.

Restart Universal Type Server

Restart the Type Server to implement server level changes, such as a change to the Bonjour Name. If you have made changes in Server Administration, follow these steps to restart the server before proceeding.

To restart the server:

- 1. Click the System link under Settings on the left.
- 2. From the *Running State* drop-down menu, choose *Stopped*, then click [Update Server]. The Type Server will close its running processes. When it is finished, Server Administration will display the *Status* page.
- 3. Click the *System* link.
- 4. From the *Running State* drop-down menu, choose *Started*, then click [Update Server]. When all processes have started, Server Administration will display the *Status* page again.

Create Workgroups and Set Server Defaults

Workgroups are the large containers in which fonts are stored. You provide access by adding users to workgroups, and can modify user permissions for each workgroup.

Users can be members of any number of workgroups, and a user's permissions can be different in each. A user could be able to add and remove fonts in one workgroup but not in another. Workgroups go beyond merely grouping fonts to allow you to control access and usage.

There are many different strategies that you can use to organize your workgroups. This guide covers creating a basic, single-workgroup installation. For details and organization suggestions download the User Management Guide from the Product Support page

(http://www.extensis.com/support/product-support/universal-type-server-6/).

Opening the User Management application

All workgroup and user tasks are performed through the User Management application. It is here that you create workgroups and user accounts as well as manage their settings and permissions.

To open User Management:

- 1. Start a supported web browser.
- 2. In the address bar, enter your Type Server's IP address followed by a colon and the port number. The default User Management port is 8080 (also called the UTS HTTP / Web Service port).

For example: http://10.1.2.32:8080, or http://localhost:8080 (if administering the server locally).

Tip: Bookmark this page in your browser for easy access in the future.

- 3. Enter the server administrator username and password, then click [Login].
 - Default administrator username: administrator
 - Default password for this account: password

Change the Server Administrator account password

Change the default Server Administrator password as soon after installation as possible.

The Server Administrator password can only be changed when you are logged in using that account, and cannot be easily recovered. For this reason, it is very important that you do not lose this password.

To change the Server Administrator account password:

- 1. In the Workgroups pane of Users & Workgroups Management, click All Users.
- 2. In the Users pane, select Administrator.
- 3. In the *Account* pane, type your new password in the *Password* field. *Important:* Write this password down and keep it in a safe place.
- 4. Type your new password again in the Confirm Password field.
- 5. Click [Save] to apply the new password.

Create a workgroup

Workgroups are like separate databases of fonts, each with its own group of users. In this guide we will create a single workgroup to get you started.

Ne	ew Workgroup
Workgroup name	My Workgroup
Default Role	Regular User 🔹
	Font Administrator
Num. users	Preview-only User
	Regular User
Added by	Workgroup Administrator
Added on	
Last modified by	
Last modified on	
Notes	
-	
	cancel save

To create a workgroup:

- 1. In the *Workgroups* pane of Users & Workgroups Management, click the [+] button. This opens the *New Workgroup* pane.
- 2. Enter a name for the workgroup.

This is the name that is displayed to users who are members of the workgroup, so it should be descriptive and unique.

3. Choose a *Default Role* from the drop-down menu.

The default role is a set of permissions that is applied automatically to users who are added to the workgroup. Role assignments are restricted to this workgroup. A user may have entirely different permissions in another workgroup. When used properly, the default role can make adding users and configuring permissions a snap.

4. Click [Save] to create the new workgroup.

Configure default synchronization settings

Two settings affect how and when fonts and other data are synchronized between the Universal Type Server and client systems.

Default User Settings				
Change Password	✓			
Activate Fonts Across Workgroups				
Time between server syncs	5 minutes			
Font Replication Mode	On demand local cache			
Enforce System Font Policy				
Disable Startup Sets				
Has Personal Workgroup	-			
Server based	۲			
Client based	\bigcirc			
System Font Policy	Move Disallowed Fonts to Desktop			
	cancel update			

To configure default synchronization settings:

- 1. At the top of Users & Workgroups Management, click the *Options* menu and choose *Default User Settings*.
- 2. From the *Time between server syncs* drop-down menu, choose a synchronization interval. This setting controls how frequently the client checks for updates from the server. If the fonts in your environment change infrequently, an hourly or daily setting may be all you need. Less frequent synchronization uses fewer server resources.
- 3. From the *Font Replication Mode* drop-down menu, choose one of the following options: All: This mode is recommended for most environments, and for mobile users. This mode automatically downloads all fonts from workgroups the user is a member of. This setting uses the most disk space, while allowing the best font access.

On-Demand Local Cache: This mode is recommended for environments that have large font collections where users are always connected to the Type Server. Fonts are downloaded 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. This mode uses a minimal amount of disk space, but also allows fonts to be available after deactivation.

On-Demand: This mode is recommended for organizations where font compliance can be compromised if users have access to fonts when they are no longer in use. Fonts are downloaded as they are requested for font previews, activation or collection. When fonts are no longer required, they are removed and are not stored in the Type Client font cache. This uses the least amount of disk space on the client. Fonts are not available after they are deactivated.

4. Click [Update] to apply the new settings.

Create Users and Add Them to Workgroups

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.

User accounts can be used with the Universal Type Client on either 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 OS X, so these fonts cannot be activated or collected by the Mac version of Universal Type Client.

Create users

When creating users, you specify basic user information: *Account name*, *Full name*, *Email Address*, and *Password*.

Note: To prevent confusion, control access, and aid in troubleshooting, do not allow users to share an account. While all users have access to the same fonts and sets in the workgroup, individual user accounts offer each user a private workspace for organizing fonts. Sharing the same account can create unexpected results for users.

	Nev	ı User		
Account	Settings	Global	Workgroups	
Account nam	e sjones			
Full nam	e Samar	ntha Jones		
Email Addres	s sjones	@example.c	com	
Passwor	d ******	****		
Confirm Passwor	d ******	****		
Added b	у			
Added o	n			
Last modified b	У			
Last modified o	n			
Note	:5			
Samantha Jones own layouts.	is a publicis	st and prom	oter who does l	her
			cance	al save

To create a new user:

1. In the *Workgroups* pane of Users & Workgroups Management, select a workgroup to add a user to.

To add a user without specifying a workgroup, select the *All Users* workgroup.

- 2. In the Users pane, click the [+] button.
- In the New User pane, in the Account tab, enter an 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.
 All other fields are optional. If the password field is left blank, a password will not be required for the user to log in.
- 4. Click [Save] to add the new user.

Typically the default user settings will be sufficient for most users. You can add a Personal Workgroup, change the user synchronization interval, or change other user settings at any time.

Add users to workgroups

For a user to have access to fonts in a workgroup, that user must be added to the workgroup. New users can be added directly to a workgroup when the user is created, or you can add existing users to any workgroup.

To add a user to a workgroup:

- 1. In the *Workgroups* pane of Users & Workgroups Management, select the *All Users* workgroup, or any other workgroup to which the user already belongs.
- 2. From the *Users* pane, drag the username into any other workgroup. The user is automatically assigned the default role in the new workgroup.
- 3. You can now edit the user's permissions for the new workgroup in the *Workgroup* tab. *Note:* At least one user in each workgroup should have permission to add fonts to the workgroup. All font manipulation is done in the Universal Type Client, including font adding, activation, organization into sets, etc.

Install Universal Type Client

Universal Type Server includes clients for both OS X and Microsoft Windows.

Universal Type Client system requirements

For the most up-to-date information about the latest release of Universal Type Client, please visit the Product Support page (*http://www.extensis.com/support/product-support/universal-type-server-6/*).

Macintosh Client

- OS X® v10.8 through 10.11
- 2.0 GHz or faster processor
- 1 GB available hard drive space for application files, plus additional space for fonts
- 100 Mbit/s or faster network connection
- An Internet connection and Safari® 7 or later or the current release of Firefox® or Chrome™ to view Help

Windows Client

- Windows® 7, Windows 8, Windows 8.1, or Windows 10
- 2.0 GHz or faster processor
- 1 GB available hard drive space for application files, plus additional space for fonts
- 100 Mbit/s or faster network connection
- An Internet connection and Internet Explorer® 10, Microsoft Edge, or the current release of Firefox or Chrome to view Help

You need to have Internet Explorer installed in order for QuickComp to work properly. It does not need to be your default browser.

Disable other font managers

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

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

Install Universal Type Client

Note: IF you are a system administrator creating OS X client disk images, or an individual who want to clean up a messy system, you may benefit from reading the Font Management in Mac OS X: Best Practices Guide (*http://www.extensis.com/downloads/documents/font-management-mac-best-practices/*).

Download the current version of the Universal Type Client installer from the Product Support page (*http://www.extensis.com/support/product-support/universal-type-server-6/*). Copy the installer onto each client's hard disk, double-click to launch the installer and follow the instructions.

The Type Client installer places font auto-activation plug-ins in the appropriate folders for recent versions of Adobe InDesign, Adobe Illustrator, Adobe InCopy, Adobe Photoshop, and QuarkXPress

if they are installed. When you upgrade to a new version of one of these design applications, simply re-run the Type Client installer to install the appropriate plug-ins.

The Font Management Core

A central feature of the Universal Type Client is the ability for the Type Client to be closed, and still have desired fonts active. The software does this through the use of a background application called the Font Management Core. This application handles all communication with the Type Server and makes it possible to close the Type Client and still keep fonts active, as well as automatically activate fonts. The Font Management Core handles all plug-in based auto-activation requests and implements any updated permissions, workgroup changes, and all other changes upon synchronization with the server.

The Font Management Core launches when a user logs in to their system, or, if stopped, when the user launches Universal Type Client. You can start and stop the Font Management Core from the Type Client preferences.

Add Fonts

You are now ready to add fonts to the Universal Type Server. Use the Universal Type Client to add fonts to your workgroup on the server. All members of the workgroup have access to all fonts added to that workgroup.

Connect to Universal Type Server

The first time you launch Universal Type Client, it displays the *Connect to Server* dialog. To begin adding fonts to Universal Type Server, you need the server's IP address, the port number, your account name, and password.

To connect to the server:

- 1. In the *Server* field, enter the IP address of the server, or choose the Bonjour name of your server from the drop-down menu.
- 2. In the *Port* field, enter the server port number 8080. This step is unnecessary if you chose a Bonjour name in the first step.
- 3. In the *Username* and *Password* fields, enter an account name and password. We recommend that you connect using an account that has permission to add fonts. *Note:* The *Password* field is case sensitive; *Username* is not.
- 4. Click [Connect]. As long as you have network access to the Type Server, you will be connected.

The server and port information is saved with Universal Type Client on your computer and you will not need to enter it again.

Add fonts

After connecting to the Type Server, you will see a list of the workgroups that you belong to in the left-hand pane of the Type Client.

Note: Depending on your role, you will see either the *My Fonts* or *All Server Fonts* workgroup. You cannot add fonts to either of these workgroups.

Fonts are checked for corruption and other problems before being uploaded to the server. As you add fonts to the workgroup, other users will have access to the fonts.

To add fonts to a workgroup:

- 1. Select any item containing fonts—your hard drive, CDs, flash drives, network volumes, folders, or files—on the desktop.
- 2. Drag your selection into the Fonts pane or onto the workgroup name to add them to the selected workgroup.

To keep fonts organized—for example, if you have folders of fonts for specific projects—you can add the fonts as sets. Each folder becomes a set with the same name and contents as the folder.

To add fonts as sets, do one of the following:

- Choose *File > Add Fonts*. Use the *Add Fonts* dialog box to locate and select a folder of fonts, then click [Add]. A set is automatically created from the folder you select.
- Select folders on the desktop that contain fonts. Drag the folders onto a workgroup in the *Workgroups* pane of Universal Type Client.

The Big Finish

Connect users

After adding necessary fonts to your workgroups, you can give out connection information to all of your users. Alternately, you can give a few users permission to the add fonts (or give them the Font Administrator role in the workgroup), and give them the responsibility to add fonts to the various workgroups.

Give each user a copy of the Universal Type Client Quick Reference, which you can download from the Product Support page (*http://www.extensis.com/support/product-support/universal-type-server-6/*). This document helps to get your client users up to speed quickly with font activation, deactivation and other common tasks.

Review the User Guides

For additional details about many other features of Universal Type Server, be sure to review the Server Administration Guide and the User Management Guide, available for download from the Product Support page (*http://www.extensis.com/support/product-support/universal-type-server-6/*). There are other tasks that you will likely want to cover soon, such as configuring a regular backup schedule, as well as modifying each user's synchronization interval and replication mode.

Contacting Extensis

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Technical Support

Technical support for current products is available by phone or through the Extensis website.

- North America: (800) 796-9798, select option 3 (8:00 am-4:00 pm Pacific time, Monday-Friday)
- US: (503) 274-7030
- Europe: +44 (0)1604 654 270
- Web: http://www.extensis.com/support/
- Web Support Form: https://secure.extensis.com/technical-support/(requires login)

Answers to frequently asked questions, troubleshooting tips, and more can also be found at the Extensis support page.

Extensis also maintains a searchable Knowledge Base

(*http://support.extensis.com/Support/58278/58411/en-US/Article/Folder/48/*) of in-depth articles on various technical topics.

Creating a tech support case

If you are experiencing a problem with a current product, you can submit a tech support case using the Extensis Web Support Form.

To access the form, you must log in using your Extensis account. Once you have logged in, provide as much of the following information as you can:

- Product name and version number;
- Serial number, if you have it available;
- Computer operating system version;
- Other details about your computer system, including RAM, hard drive size and free space, and processor type and speed;
- A description of the problem, including any error message that might be displayed;
- Your phone number if you want to have a representative contact you.

Support Policy

Extensis provides full support for the current version of all shipping products. In addition, Extensis provides limited support for older products up to one year after the product version is no longer offered for sale. For complete details see the Extensis Product Support Policy.

For details on currently supported products, see:

- Portfolio Support Guide
- Universal Type Server Support Guide
- Universal Type Client Support Guide
- Suitcase Fusion Support Guide

Priority Support

If you have a current Annual Service Agreement, you are entitled to priority support.

If you are in North or South America or the Caribbean:

• Email: *p1support@extensis.com*

If you are in Europe, Africa, the Middle East, India, Australasia, or Asia (except Japan):

• Email: EuroASASupport@extensis.com

If you are evaluating a demo copy of the product, please contact your sales representative for assistance.

Community Support

Extensis maintains community forums on all current and many older products. Often, problems you may be experiencing have been discovered and answered here. In addition, suggestions you have may help others resolve issues.

The forums also serve as a way for Extensis to take the pulse of our user community so that we can identify bugs and other issues and gather suggestions for improving our software.

Please visit the Extensis Forums and bookmark the page.