

 Extensis™

UniversalTypeServer®6

TYPE CLIENT USER GUIDE

“

3.14

”

Copyright © 2008–2018 Celartem, Inc., doing business as Extensis. This document and the software described in it are copyrighted with all rights reserved. This document or the software described may not be copied, in whole or part, without the written consent of Extensis, except in the normal use of the software, or to make a backup copy of the software. This exception does not allow copies to be made for others. Licensed under U.S. patents.

Celartem, Extensis, LizardTech, MrSID, NetPublish, Portfolio, Portfolio Flow, Portfolio NetPublish, Portfolio Server, Suitcase Fusion, Type Server, TurboSync, TeamSync, and Universal Type Server are registered trademarks of Celartem, Inc.

The Celartem logo, Extensis logos, LizardTech logos, Extensis Portfolio, Font Sense, Font Vault, FontLink, QuickComp, QuickFind, QuickMatch, QuickType, Suitcase, Suitcase Attaché, Universal Type, Universal Type Client, and Universal Type Core are trademarks of Celartem, Inc.

Adobe, Acrobat, After Effects, Creative Cloud, Creative Suite, Illustrator, InCopy, InDesign, Photoshop, PostScript, Typekit and XMP are either registered trademarks or trademarks of Adobe Systems Incorporated in the United States and/or other countries.

Apache Tika, Apache Tomcat and Tomcat are trademarks of the Apache Software Foundation.

Apple, Bonjour, the Bonjour logo, Finder, iBooks, iPhone, Mac, the Mac logo, Mac OS, OS X, Safari, and TrueType are trademarks of Apple Inc., registered in the U.S. and other countries. macOS is a trademark of Apple Inc. App Store is a service mark of Apple Inc.

iOS is a trademark or registered trademark of Cisco in the U.S. and other countries and is used under license.

Elasticsearch is a trademark of Elasticsearch BV, registered in the U.S. and in other countries.

Google, Android, and Google Play are trademarks of Google Inc.

Intel and Intel Core are trademarks of Intel Corporation in the U.S. and/or other countries.

Microsoft, Excel, Internet Explorer, PowerPoint, SQL Server, and Windows are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Oracle and Java are registered trademarks of Oracle and/or its affiliates.

Quark, QuarkXPress, XTensions, QuarkXTensions and other Quark related marks which Quark may adopt from time to time are trademarks or registered trademarks of Quark, Inc. and its affiliates in the U.S. and/or other countries.

All other trademarks are the property of their respective owners.

Includes DBPrefsWindowController by Dave Batton, updated by David Keegan

(<https://github.com/kgndb/DBPrefsWindowController>). Copyright © 2007. Some rights reserved.

DBPrefsWindowController is licensed under a Creative Commons license:

<http://creativecommons.org/licenses/by/3.0/>.



Contents

Introducing Universal Type Server	5
What's New	5
The Universal Type Server Daily Workflow	7
Understanding the Client Window	7
The Details Panel	8
Disabling Other Font Managers	8
Connecting to Universal Type Server	9
Understanding Your Permissions	12
Handling System Fonts	13
Cleaning Font Caches (Mac OS X)	14
Understanding Personal Workgroups	14
The "My Fonts" workgroup	14
Restoring User-Disabled Warnings	15
Activating and Deactivating Fonts	16
Understanding Font Activation	16
Selecting a Workgroup	17
Activating Fonts	17
Deactivating Fonts	19
Handling Activation Conflicts	19
Using Typekit fonts	19
Working with Auto-Activation Plug-ins	20
The Extensis Font Panel	28
The Universal Type Core	29
Understanding Font License Compliance	29
Adding, Deleting, and Collecting Fonts	31
Adding Fonts	31
Resolving Font Problems	33
Deleting Fonts	34
Collecting Fonts	35
Sorting and Finding Fonts	38
Working with Columns of Font Information	38
Grouping Fonts By Family	38
Using QuickFind	40
Specifying Find Criteria	40
Using Smart Sets to Find Fonts	41
Using QuickMatch to Find Visually Similar Fonts	42
Viewing font info in the Attributes pane	42
Favorites	43
Previewing Fonts	44
Displaying Previews	44

Customizing Preview Text	44
Customizing Preview Size	45
Floating Previews	45
Font Snapshots	46
Viewing Special Characters	46
The Glyph View Window	46
Printing Preview Pages	47
Read-Only Workgroup Access	47
QuickComp	47
Working with Sets	48
Creating Sets	48
Nesting Sets	50
Sharing Sets	50
Moving, Copying, and Deleting Fonts in Sets	51
Renaming Sets	51
Deleting Sets	51
Working with Smart Sets	51
Using a Startup Set	52
Font Attributes	53
Working with Attributes	53
Using Attributes to Find Fonts and Create Smart Sets	53
Using Attributes to Sort Fonts	54
Applying and Removing Font Attributes	55
Reverting to Default Attributes	56
Creating, Editing, and Deleting Custom Attributes	56
Developing a Keyword Strategy	57
Contacting Extensis	58
Technical Support	59
Index	60

Introducing Universal Type Server

Using Universal Type Server®, all the fonts in your organization are consolidated into a single, secure location on a server. Fonts are managed as follows:

- The administrator subdivides the fonts into workgroups intended for specific types of users or projects.
- The administrator decides which workgroups you need to access.
- You access workgroups, and the fonts within them, through the Universal Type Client™ application.
- Your user permissions control what you can do with fonts within each workgroup, including whether you can add fonts, share sets, change a font's class, and more.
- Some users are font administrators, giving them more power over fonts.

What's New

New in 6.1

Universal Type Server

- Update to use Java 8 and JBoss 10 to ensure the highest level of security
- Secure server transmissions now utilize TLS v1.

Universal Type Client

- Added auto-activation plug-in and Extensis Font Panel support for Adobe InDesign, Illustrator, and Photoshop CC 2015 (Summer 2016).
- Added auto-activation plug-in support for Adobe InCopy and After Effects CC 2015 (Summer 2016) and QuarkXPress 2016.

User Management

- New report: Font Usage

New in 6.0

Universal Type Server

- New report analytics engine that will help server administrators know everything about their font environment at their fingertips
- Configurable server memory management
- Support for OS X El Capitan

Universal Type Client

- Auto-activation plug-in for Adobe After Effects

User Management

- Enhanced, extensible reporting module

Recent updates

Universal Type Server

- FontLink for Adobe® InDesign® Server allows InDesign Server to connect to your Universal Type Server to include managed fonts in your automated workflow.
- **TurboSync™**: Fonts and metadata replicate to clients up to 27 times faster.
- **Failover configuration**: Enterprise users can set up a second Universal Type Server to ensure maximum up-time with minimum disruption.
- **External SQL database**: Enterprise users can add a high-performance database for user and workgroup maintenance and font usage tracking.
- Fully 64-bit native for improved performance and better system resource utilization.

Universal Type Client

- **Extensis Font Panel**: The Extensis Font Panel allows you to access all of your workgroups directly in Adobe InDesign, Illustrator, and Photoshop CS6 and later.
- **“My Fonts” Workgroup**: Users can now see the fonts in all their workgroups in one place.
- **Font Favorites**: Mark fonts as favorites and easily find them when you need them. Use them to search fonts and create smart sets.
- **Fontspiration**: The Details Panel includes the new Fontspiration tab. Fontspiration displays examples of WebINK fonts designed to inspire you to seek new and unique ways to use typography in your own projects. Click an example to view that example in your Web browser, and from there follow Fontspiration and view the thousands of typography examples gleaned from around the Web.
- **QuarkXPress 10**: Universal Type Client includes an auto-activation plug-in for QuarkXPress 10 and 10.1, and can also clean font caches for the Macintosh version.
- **QuickComp**: QuickComp is a new Preview option that displays your font choices used in a variety of document layouts. Multiple templates are available that mimic brochures, newsletters, and other common design projects.
- **Details Panel**: The Details Panel has been enlarged and moved from the bottom left to the right side of the main window. It displays more details about anything you select in the Workgroups pane, provides shortcuts for QuickFind searches using many popular search criteria, and allows you to directly edit some properties.
- **Color Previews**: You can now set the font and background colors used in the Previews pane. Test color combinations, use them in floating previews, and grab a Font Snapshot.
- Support for Adobe Creative Cloud apps and Typekit fonts.

User Management

- Full Administrator users can now access the User Management application using their standard LDAP credentials.
- **Compliance model**: Universal Type Server uses a “per-machine” licensing model, similar to licenses purchased from most type foundries.
- **Enforcement options**: Enterprise users can choose between strict enforcement, in which fonts are not allowed to be activated beyond the limits of your licenses, or notification, in which you receive an alert whenever a font is used beyond the number of available licenses.
- Map Active Directory groups directly to Type Server workgroups.

The Universal Type Server Daily Workflow

If you've been using another font manager, your workflow stays relatively the same—open the font manager, find the fonts you want to use, and activate them. The benefit of Universal Type Server is that everyone you work with has access to the same fonts at the same time. Take a look at the typical use of Type Server:

- Launch the Universal Type Client
- Open the appropriate workgroup (in many cases, you will belong to only one workgroup)
- Use the Universal Type Client to sort and preview fonts
- Customize font keywords, classes, foundries, and more*
- Create sets of fonts for specific projects or clients
- Add new fonts you purchased or received with jobs*
- Activate any fonts you want to use
- Use the fonts in any application in any document
- Collect fonts for output*

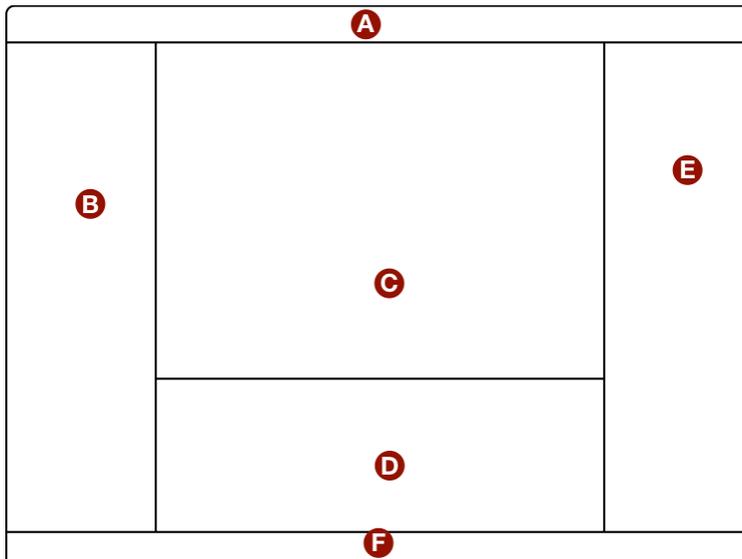
Universal Type Server can also activate fonts automatically when you open documents in supported applications. (See **Automatically Activating Fonts** on page 23.)

*You need permission to perform these activities.

Understanding the Client Window

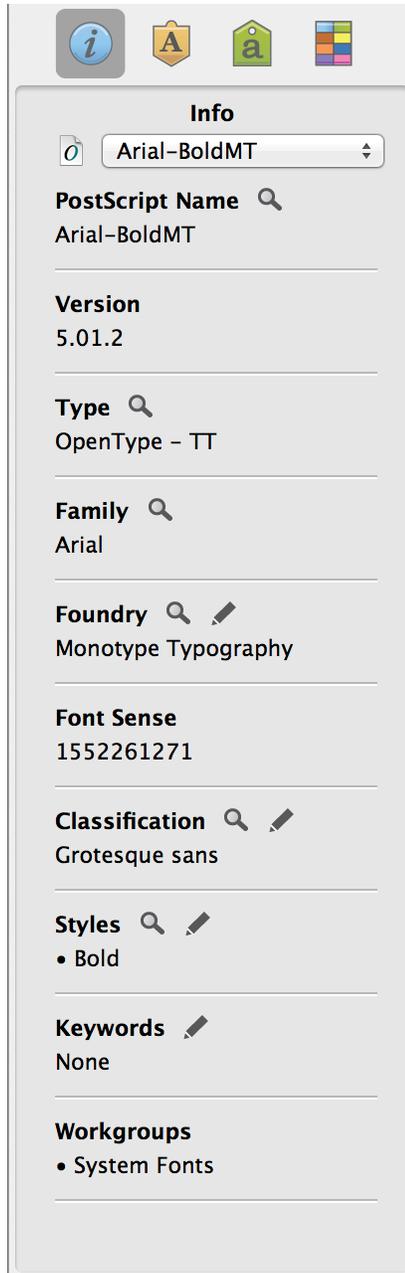
The Universal Type Client offers all the power you need to manage fonts.

In Universal Type Client, you will do most of your work in the Main window, which consists of four panes, the toolbar, and the status bar.



- | | | | |
|---|----------------|---|---------------|
| A | Toolbar | D | Fonts pane |
| B | Libraries pane | E | Details Panel |
| C | Previews pane | F | Status bar |

The Details Panel



The Details Panel has four tabs: **Info**, **Licenses**, **Attributes**, and **Fontspiration**. Click a tab to display relevant information about the selection.

Info

The **Info** tab includes a pop-up menu at the top; if you have chosen multiple items (workgroups, sets, or fonts), you can choose a different item from the menu to display its info.

The information displayed depends on what is selected:

- **Workgroup:** The **Info** tab displays the workgroup's icon, name, type, and font count.
- **Set:** The **Info** tab displays the set's icon, name, and font count.
- **Font:** The **Info** tab displays the font's icon, name, PostScript name, version, type, family, foundry, Font Sense ID, class, applied styles, applied keywords, and the workgroups that include the font.

To perform a search based on a specific criterion, click one of the  icons in the **Info** tab. For example, to find all fonts in the current workgroup that match the selected font's **Type**, click the  next to **Type**.

To edit one of the current font's attributes, click the  icon next to the attribute name, such as **Keywords**.

Licenses

The **Licenses** tab allows you to view information about licenses assigned to the selected font.

Attributes

The **Attributes** tab allows you to change the attributes applied to the selected font.

Fontspiration

The **Fontspiration** tab presents examples of typography used in design elements. You can click any example to open a web page that shows more information about the example, and from there explore other ways to use typography in your design projects.

Disabling 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 managers, 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 computer.

Mac OS X v10.5 and 10.6 include basic font management capabilities, including automatic activation and alerts if the contents of system font folders have been modified. These features interfere with Universal Type Client, so you need to disable them to avoid conflict.

You can access these settings in two different ways: from the Unix command line using the Terminal application, or from the Preferences dialog in the Font Book application.

Disabling OS X Font Management using Font Book

Use this method if there is one regular user of the Macintosh in question, and that user's computer login account has administrator access privileges.

NOTE: You should not start Font Book while Universal Type Client is running.

1. Start the Font Book application (located in the Applications folder on your hard disk).
TIP: In the Finder, press Command-Shift-A to open the Applications folder.
2. Choose **Font Book > Preferences**.
3. Clear the box labeled **Automatic font activation**.
This option interferes with automatic font activation performed by Universal Type Server, and does not allow for automatic font activation across all applications. Type Client allows you to use plug-in based automatic activation for major design applications.
4. **OS X 10.8 Mountain Lion:** Clear the box labeled **Alert me if system fonts change**.
If you leave this setting enabled, the Mac OS will automatically place certain fonts back into your system font folders, even if you remove them. It will also interfere with Universal Type Server's ability to manage or override your system fonts.
NOTE: If you are not logged in to the computer as an administrator, this setting will not be saved.
5. Close the Preferences dialog and quit Font Book.

Disabling OS X Font Management using Terminal

Use this method if the primary user of the Macintosh does not have administrator access to the computer, or if you need to disabled native font management for multiple users.

1. Start the Terminal application (located in the Utilities folder inside the Applications folder).
TIP: In the Finder, press Command-Shift-U to open the Utilities folder.
2. Type **atsutil autoactivation -d** and press Return. (This disables auto-activation for the current user account.)
3. Type **sudo atsutil fontprotection -off** and press Return. (This turns off system font alerts for all users.)
You'll be prompted for a password; enter the password for the root user on the computer and press Return again.
4. Type **exit** and press Return, then quit Terminal.

For a computer with multiple users, log in as each user and perform step 2. You could instead use Font Book to clear the Automatic font activation setting for additional users.

Connecting to Universal Type Server

Your user name and password allow you to connect to Universal Type Server from any computer with access to your network. Once you're connected through Universal Type Client, you can open a workgroup and begin using fonts. When necessary, you can work offline as well. Your user settings and permissions control precisely what you can do with the fonts in each workgroup.

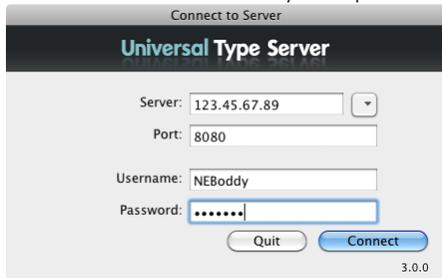
Connecting the First Time

The first time you open Universal Type Client, it displays the **Connect to Server** dialog. To begin accessing fonts through Universal Type Server, you need the server's IP address, the port number, your user name, and your password from the administrator. The server and port information is saved with Universal Type Client on your computer and you will not need to enter it again.

To connect to the server:

1. In the **Server** field, enter the IP address, DNS name or Bonjour name of the server.
You can also browse for servers on your network; click the drop-down menu button and choose **Browse Local Servers**.

If you have connected to a Type Server before, you can select the server name or address from the drop-down menu; this automatically completes the **Port** field.



2. In the **Port** field, enter the default port number, **8080**, or the port number supplied by your administrator. If you entered a Bonjour name into the Server field, you do not need to enter a port number.
3. In the **Username** and **Password** fields, enter the information supplied by your administrator.

NOTE

The **Password** field is case sensitive, but the **Username** is not. If your login fails, check the spelling and case of your password. If you continue to have problems, contact the administrator.

4. Click the **Connect** button. As long as you have access to the network, you will be connected to Universal Type Server.

If you need to disconnect entirely from Universal Type Server at any time, choose **Server > Forget Connection**. If you need to continue working with active fonts while disconnected, choose **Server > Go Offline**.

Connecting Automatically

The Universal Type Core is a process that runs in the background to keep the appropriate fonts active on your system. This means that you do not need to have the Universal Type Client running to keep your fonts active.

When you restart your computer, the Universal Type Core automatically starts and connects to your previously-selected Type Server. As a result, the fonts you permanently activate in the Universal Type Client are available every time you start your computer.

When the Universal Type Core is running, you can open and close the Universal Type Client as often as necessary. You only need to re-enter your user name and password if you connect from another computer or if you reconnect after choosing **Server > Forget Connection**.

Changing Your Password

You can change your password to something more meaningful or easier to remember, if the administrator has enabled this option for your Type Server account. For maximum security, change your password periodically and choose one that is not obvious to your coworkers.

To change your password:

1. In the Universal Type Client, choose **Server > Change Password**.
(If this command is unavailable, you do not have permission to change your password.)
2. Type your new password in the **New Password** field.
3. Enter the password again in the **Verify** field. (Remember, passwords are case-sensitive.)
4. Click **Change Password** to save the change. Use the new password the next time you connect to Universal Type Server.

Disconnecting from Universal Type Server

You will rarely need to manually disconnect from Type Server. But if you do, first make sure you're finished using fonts and that you don't have any jobs in the print queue as disconnecting automatically deactivates all fonts. (You will be able to continue to use system fonts.)

NOTE

If you need to continue working with fonts while disconnected, choose **Server > Go Offline**. Depending on your user settings, you will have access to (1) active fonts and (2) fonts already downloaded to your system. Fonts that are not available while offline display in red.

To disconnect from Universal Type Server:

1. Choose **Server > Forget Connection**.
2. When the warning displays reminding you that all fonts activated through Universal Type Client will be deactivated, click **Forget Connection**.

To close the Universal Type Client without disconnecting:

- **Macintosh:** Choose **Universal Type Client > Quit Universal Type Client** or press Command-Q.
- **Windows:** Choose **File > Exit** or press Alt-F4.

Closing the Universal Type Client window does not disconnect you from the server or deactivate fonts. The Universal Type Core runs as a background application that keeps fonts active and interfaces with the auto-activation plug-ins.

Working Remotely

If you need to work with fonts while not connected to Universal Type Server—for example, if you're working off site without an Internet connection—you can work in offline mode. To work in offline mode, choose **Server > Go Offline**. When you are ready to connect to the server again, choose **Server > Go Online**.

NOTE

If Universal Type Server is down for maintenance or any other reason, your Universal Type Client will automatically work in offline mode.

When you go offline, Universal Type Client will give you the option of downloading any fonts in your workgroups that you have not activated. Choosing to download fonts will allow you to use those fonts when you are offline. Font download progress will be displayed in the status bar and the Activity window. You can cancel the download at any time by clicking the **Stop**  button.

If any fonts are unavailable for download, you will be alerted when all other fonts have been downloaded.

You can also go offline from within your design applications if you have the auto-activation plug-in installed; if you do this, you will not be prompted to download additional fonts.

While working offline, your font management activities will be limited as follows:

- **Font access:** You will have access to the fonts that were in your cache when you disconnected from the server. See **Understanding Cached Fonts** below for more information.
- **Font management:** You cannot change any font information that affects the information on the server while offline. This means you cannot perform activities such as sharing sets, changing attributes like keywords, or deleting fonts.
- **Using a Personal Workgroup:** If you have a Personal Workgroup, you will be able to activate and preview fonts in that workgroup, but you will not be able to change font attributes.

NOTE: You must connect with the Type Server at least once every 30 days to continue using the Universal Type Client.

Understanding Cached Fonts

The fonts in your cache—the fonts available to you while working offline—vary according to the Font Replication Mode the administrator has assigned to you. The Font Replication Mode controls when fonts are downloaded to your computer. If you need to work offline, ask the administrator what your Font Replication Mode is.

- **All:** Fonts from all the workgroups you belong to are automatically downloaded and available to you while working offline. When you connect to the server again, your fonts are automatically synchronized with the server. If you need to work offline often, this is the best setting for you.
- **On Demand:** Fonts are downloaded as required for activating, previewing, and collecting. When fonts are no longer required, they are removed from your system. Only fonts that are currently active or being previewed are available while working offline. In this case, activate all the fonts you may need before choosing **Server > Go Offline**.
- **On Demand Local Cache:** As with On Demand, fonts are downloaded as required for activating, previewing, and collecting. The difference is that the fonts remain in your Type Client cache and are available for use while working offline. As with On Demand, you may want to activate all the fonts you may need before choosing **Server > Go Offline**.

NOTE

When you are working in online mode, if your Font Replication Mode is set to **All** or **On Demand Local Cache**, your fonts may not match the server fonts at all times. For example, if another user adds a new font or deletes a font, your Type Client may not update for several minutes. To ensure that your fonts are the same as those on the server, choose **Server > Synchronize**. To force all fonts to be downloaded from the server, choose **Server > Synchronize & Reset**. (On Mac OS X, hold down the **OPTION** key, then click the **Server** menu to see this choice.)

Understanding Your Permissions

When an administrator adds you to Universal Type Server, they decide which functions you can perform within the workgroups you are assigned to. Your permissions are likely to vary according to your position, experience, and expertise, and your permissions may also vary from one workgroup to another.

NOTE: If your permissions do not allow you to do your job, contact the server administrator.

Font and Workgroup Administrators

If you are a font administrator in a workgroup, you can perform all the font-management tasks available in Universal Type Client. These include:

- Add and delete fonts in workgroups
- Collect fonts for output
- Create, edit, and delete sets, smart sets, and startup sets
- Share and unshare sets
- Create, edit, remove, and apply attributes to fonts (including keywords and font licenses)
- Regroup and rename font families
- Activate fonts across workgroups

If you are a workgroup administrator, you can perform all these tasks plus you can add and remove members from the workgroup.

NOTE; These are the default permissions; they can be modified for Font and Workgroup Administrators.

Handling System Fonts

Your system fonts display as a “workgroup” in the Universal Type Client at the bottom of the Workgroups pane. These fonts are activated by your operating system.

If a set named “Unknown” or “Other” is listed in your System Fonts workgroup, these are typically fonts that have been activated by other font managers and applications other than the operating system.

Operating system font folders

Depending upon your configuration, you may not be able to add fonts to the physical system fonts folder on your computer. Your server administrator controls whether or not you can add fonts, and the list of approved fonts that can be added.

If your server administrator has enabled system font management, when you try to add fonts to the system fonts folder using the Mac OS X Finder or Windows Explorer, any fonts that are not on the approved list are automatically removed. They will either be placed into a folder on your computer’s desktop, or immediately deleted. Check with your server administrator for details about your setup and list of approved fonts.

Universal Type Client has information regarding fonts that your operating system requires. This information is updated with each major operating system release. It is best to keep Universal Type Client current to keep your required fonts list current.

System fonts on Mac OS X

When using Universal Type Server on Mac OS X, fonts that are required for the operating system to function properly are located in the System Fonts “System” folder with a “locked” icon. To ensure the stability of your system, these fonts cannot be manually deactivated.

If you attempt to activate a font that has the same PostScript name as an active system font, as long as the font is not a “required” system font, the Universal Type Client automatically deactivates the system font and activates the requested font based on your activation preferences. For information about setting this preference, see **Handling Activation Conflicts** on page 19.

System fonts on Microsoft Windows

Fonts required for Microsoft Windows to function are listed in the System workgroup folder with a “locked” icon. These fonts cannot be deactivated or overridden.

Cleaning Font Caches (Mac OS X)

Many applications, including your operating system, store information about fonts you use frequently. This makes accessing those fonts much faster. These font caches can become corrupt, which can lead to slower performance and to fonts not displaying properly.

It is a good idea to clean your font caches from time to time. If you are seeing problems with the way some fonts are displayed, or suddenly experience a slowdown when loading a program, it's probably a good idea to clean your caches.

Universal Type Client will clean the caches maintained by:

- Mac OS X v10.8–10.10;
- Microsoft Office 2008 and 2011;
- Adobe InDesign CS6, Creative Cloud, and Creative Cloud 2014;
- Adobe Illustrator CS6, Creative Cloud, and Creative Cloud 2014;
- QuarkXPress 10.

To clean your font caches:

1. Quit all other applications.
2. Launch Universal Type Client.
3. Choose **File > Clean Font Caches**.
4. Click **Clean and Restart**.
5. When prompted, enter your system password and click **OK**.

Type Client will delete all the font cache files for the OS and the applications you have installed, then restart your computer.

NOTE

After you clean your font caches, each application (including Mac OS X) will rebuild the caches it uses. This will typically happen the first time you start the program after you clean the caches, and for some applications may take a minute or more.

Understanding Personal Workgroups

In addition to the workgroups you belong to, the administrator can give you a Personal Workgroup to store your own fonts in. If you have a Personal Workgroup, you can add, delete, and collect the fonts at your discretion, but other users will not be able to see or access fonts in your Personal Workgroup. Therefore, you should not use fonts from your Personal Workgroup in shared or group projects.

As with other fonts, those in your Personal Workgroup are deactivated automatically when you disconnect from Universal Type Server. If your Personal Workgroup is on your local workstation, you will be able to work with those fonts while in offline mode. See **Working Remotely** on page 11.

The “My Fonts” workgroup

The “My Fonts” workgroup lists all the fonts available in all the workgroups you belong to.

You can search, create sets and smart sets, and activate or deactivate fonts in “My Fonts.” You cannot delete fonts.

When any workgroup member adds or removes a font in one of your workgroups, that font will be added or removed in your “My Fonts” workgroup as well. (A font will only be removed from “My Fonts” if it does not exist in any of your other workgroups.)

Activating a font in “My Fonts” will activate it in all of your workgroups; deactivating a font will deactivate it in all of your workgroups.

Restoring User-Disabled Warnings

From time to time while you are using the Universal Type Client, the application will warn you about the consequences of an action or command. If you don’t want to be warned again about the consequences of that specific action again, you can check a box to disable that warning in the future.

If at some later time you become concerned that you are missing important information, you can restore all warnings that you previously disabled.

To restore disabled warnings:

1. Choose **Universal Type Client > Preferences** (Mac OS X) or **Edit > Preferences** (Windows).
2. Click the **Restore** button.
3. Click the **OK** button.

Activating and Deactivating Fonts

You use the Universal Type Client to manage fonts that are hosted by Universal Type Server. As your font manager, the Type Client lets you quickly find the fonts you need, and then activate and deactivate individual fonts, families, and sets. You can work with fonts as follows:

- You can activate fonts permanently, so they're active the entire time you're connected to Universal Type Server.
- The administrator can specify a startup set of fonts in your workgroup that activate permanently when you connect.
- You can activate fonts temporarily, so they're available until you disconnect from the server or shut down your computer.
- Plug-ins provided with Universal Type Server automatically and precisely activate fonts when you open documents in popular design applications.
- Once fonts are active, they're available for use in all your applications.
- When you're finished using fonts, you can deactivate them at any time. Fonts that are temporarily active deactivate when you disconnect from Universal Type Server.
- The Universal Type Client shows fonts activated through your system, which are always active, and your personal workgroup of fonts (if you have one).
- You can activate and deactivate fonts while working offline as well. See **Working Remotely** on page 11.
- You can activate fonts using the Extensis Font Panel in Adobe Illustrator, InDesign, and Photoshop CS6 and later.

Understanding Font Activation

The typical function of a font manager is to activate the fonts you need, when you need them. This helps you avoid keeping hundreds or thousands of fonts active at once, which can severely impact the performance of your system and your applications.

Another function of an advanced font manager is the ability to use fonts in a collaborative environment with the assurance that each person accessing a document will have the exact fonts used by the document.

Determining a Font's Status

To determine the status of a font, family, or set, check the icon in the **Activation** column to its left:

-  A blue dot indicates fonts that are active temporarily. In the case of a family or set, all the fonts have the same status.
-  A green dot indicates fonts that are active permanently.
-  A hollow dot means some of the fonts in a family or set are active and some are inactive.
-  A blue diamond means fonts were automatically activated by a plug-in.
-  A red dot indicates a corrupt font that has been *blacklisted*.

Caching Fonts

To speed the process of activating fonts, Universal Type Server stores fonts temporarily on your computer. When you activate a font through the Universal Type Client, Type Server looks for it in this local cache first. Cached fonts are compared to fonts on the server to make sure they haven't changed, then activated on your system.

The administrator specifies how each user's fonts are cached. The way your fonts are cached controls which fonts are available when you work offline.

See **Understanding Cached Fonts** on page 12 for more information.

Updating Font Menus

In applications that dynamically update their font menus, active fonts are immediately added to the font list. These include most of the major design applications, such as QuarkXPress, InDesign, Photoshop, and Illustrator.

If an application is not capable of dynamically updating its font menus, you need to quit and reopen the application to access newly activated fonts.

Selecting a Workgroup

The **Workgroups** pane in the Universal Type Client lists all the workgroups that you belong to. Click on a workgroup to select it and begin working with its fonts and sets.

Workgroups function as follows:

- In most cases, you will belong to only one workgroup, and it is automatically selected for you.
- Your ability to add, delete, and collect fonts may vary among workgroups.
- Any fonts activated through your system are listed in the System Fonts workgroup. You cannot activate or deactivate them through the Universal Type Client.
- If the administrator gave you a personal workgroup, it is named "Personal Workgroup" or "Local Personal Workgroup." You can add, delete, collect, and create sets of fonts in your personal workgroup, even if your abilities are limited in other workgroups.

NOTE

Although you may have permission to work with fonts in multiple workgroups, it is not the most ideal workflow. The plug-ins can restrict auto-activation of fonts to a single workgroup. By using multiple workgroups, the plug-ins are not able to create font sets from fonts in multiple workgroups. In addition, if you use fonts from multiple workgroups in a document, then send the document to other users, those users may not have access to all the necessary workgroups.

Activating Fonts

The Universal Type Client allows you to activate and deactivate fonts as you need them. When a font is active, it's available to all your applications. Depending on your needs and workflow, you can activate a typeface family while designing a new document, activate a set for a project, or activate a single font used in a document that you're editing.

Selecting fonts

You can select sets in the **Workgroups** pane, or fonts and families in the **Fonts** pane. You can't simultaneously make selections in both panes.

- To select a single item (font, family, or set), click it once.
- To select multiple items, hold down the **COMMAND** key (Mac) or **CTRL** key (Windows), then click each item.
- To select a range of items, click the first item in the range, hold down the Shift key, then click the last item.
- To expose the individual fonts in a family, click the triangle to the left of the family name. If families are not visible in the **Fonts** pane, choose **View > Group Fonts by Family**.

Activation style

When you activate fonts temporarily, they stay active until you log out from Universal Type Server. (If your computer crashes, Universal Type Server reactivates fonts that you have activated temporarily.)

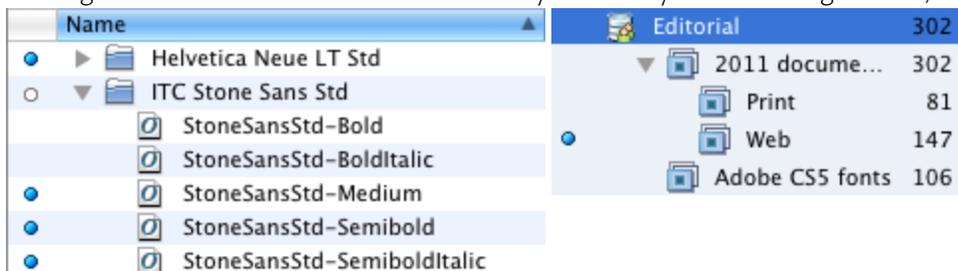
When you activate fonts permanently, they activate automatically each time you connect to Universal Type Server.

In general, use permanent activation for fonts that you use daily, and use temporary activation for the fonts that you use for quick jobs. If you're going to work on a project for several days, you might activate its fonts permanently, then deactivate them when you're finished with the project.

To temporarily activate selected fonts:

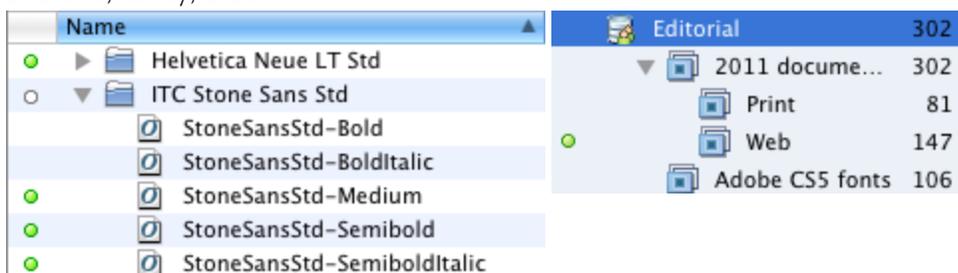
- Click the blue **Temporary** button  on the toolbar, or
- Choose **File > Activate**, or
- Press Command-O (Mac) or Ctrl-O (Windows), or
- Click in the **Activation** column to the left of a font, family, or set.

Clicking in the activation column activates only the item you are clicking next to, whether it is selected or not.



To permanently activate selected fonts:

- Click the green **Permanent** button  on the toolbar, or
- Hold down the **OPTION** key (Mac) or **CTRL** key (Windows) while you click in the **Activation** column to the left of a font, family, or set.



Deactivating Fonts

To deactivate fonts:

- Select the fonts, families, or sets in Universal Type Client, then
- Click the gray **Deactivate** button ● on the toolbar, or
- Choose **File > Deactivate**, or
- Press Command-K (Mac) or Ctrl-K (Windows), or
- Click in the **Activation** column to the left of a font, family, or set. (You can click in this column without first selecting fonts.)

Handling Activation Conflicts

The Universal Type Client handles font conflicts based on your preferences.

To set activation conflict preferences:

1. Choose **Universal Type Client > Preferences** (Mac) or **Edit > Preferences** (Windows).
2. Select an activation option:
 - Activate the requested font.
 - Keep the current font active.
3. Enable the **Notify if Conflict Occurs** option if you want to be alerted about conflicts when they occur.
4. Click **OK** to accept the new settings.

NOTE: If a font is activated by a startup set, you are not able to override or deactivate the font.

Using Typekit fonts

Typekit fonts appear in Universal Type Client as a separate workgroup, and you can use many of Type Client's unique features with these fonts.

The Typekit workgroup

Typekit fonts that you have currently synced to your desktop are available in Type Client. If you remove all Typekit fonts from your system, the Typekit workgroup will not be displayed.

The Typekit workgroup is created or updated when you start Type Client. If you add or remove Typekit fonts while Universal Type Client is running, you will need to restart Type Client to see the changes.

- You can use Typekit fonts in any Type Client preview, including QuickComp.
- Typekit fonts are fully compatible with Font Sense, ensuring your documents will always use the correct font.
- You can assign keywords to Typekit fonts, and mark Typekit fonts as favorites.
- You can search for Typekit fonts.
- You can use Typekit fonts as the basis for a QuickMatch operation, and also use QuickMatch to find fonts in the Typekit workgroup.
- If a conflict occurs between a Typekit font and a font in another workgroup, the Typekit font will be used and the conflicting font will be deactivated.
If you want to use a font that conflicts with a Typekit font, use the Adobe Creative Cloud application to remove the Typekit font from your desktop.
- You can activate fonts using the Extensis Font Panel in Adobe Illustrator, InDesign, and Photoshop CS5 and later.

NOTE: Your license with Adobe allows you to use Typekit fonts in any application and embed them in documents for distribution; see the **Typekit Services Agreement** (http://www.adobe.com/products/eulas/tou_typekit/) for specific rights and restrictions.

Working with Auto-Activation Plug-ins

To automatically activate precisely the correct fonts used in documents, Universal Type Server provides plug-in software modules that use the Extensis Font Sense technology.

The plug-ins work by saving Font Sense™ metadata within your documents, and then using the metadata to automatically activate the correct fonts.

In addition, to enable precise font identification and activation, the Universal Type plug-ins can identify all the fonts used in a document, and then create a set or collect the fonts for delivery to a service bureau. The **Collect Fonts for Output** feature and the **Create Document Set** feature both streamline the process of locating all of the different fonts used in documents.

Understanding Font Sense Technology

As most publishers know, when you open a document and it requires a specific font, activating any font with that name is not an option. In the font world, Helvetica is not Helvetica is not Helvetica. Even fonts from the same foundry, such as Adobe Garamond, exist in multiple versions. Using the wrong fonts can result in text reflow, which can alter line breaks, cut off text, and otherwise affect the design. To ensure that you're always using the correct fonts, Universal Type Server and Font Sense provide unique font identification and automatic activation.

Font Sense technology is designed to overcome the limitations of font names. Most applications record the names and sometimes the types of fonts (such as OpenType or PostScript) used in documents. But with the various types of fonts, vendors, and versions that exist, font names are not unique identifiers. Most users have multiple versions of many fonts on their computers—particularly common fonts such as Helvetica and Times—and the applications they use cannot identify which versions are used in their documents. Font Sense solves this by saving complete font metadata into documents.

The font metadata generated by Font Sense starts with the name, type, foundry, and version number of the fonts. Then, for truly unique font identification, the metadata includes additional items such as checksum values. The final result is the Font Sense identification number, which you can view in the Universal Type Client (**View > Columns > Font Sense**).

Each time you save a document in a supported application, the Universal Type Server plug-in records updated Font Sense metadata with the document. The documents no longer rely solely on names to identify the fonts used in them.

When you open documents containing Font Sense specifications, the Universal Type Server plug-ins use the Font Sense data to determine and activate precisely the right fonts. Since the font metadata is saved within the document, detailed font information travels with it. No matter where the document is opened, Font Sense knows precisely which fonts to activate.

Preparing Documents and Workgroups

The ultimate goal of using Font Sense is that you and the other people in your workflow never encounter missing fonts, font conflicts, or issues with multiple versions of the same font. To make this happen, you need to:

- Make sure documents have Font Sense metadata saved with them (see **Saving Font Sense Metadata with Documents** on the next page). If the documents were previously opened with the plug-ins from Font Reserve, Font Reserve Server, or Suitcase Fusion, they will already contain this data.
- Make sure users have access to all the fonts they need by reviewing the fonts and users assigned to each workgroup. The plug-ins only auto-activate and create sets from fonts from one workgroup.
- Plan your font workgroups to ensure that all the fonts used to design a document are in a single workgroup. Also, be sure that all the users who may work on the document are members of that workgroup. This is the best and easiest way to ensure that all the users who work on a document have access to the necessary fonts.

NOTE

Users with permission to **Activate Fonts Across Workgroups** can choose **Select Workgroup > All Workgroups** to automatically activate fonts in multiple workgroups. Unless all users have this permission, though, you should still design documents with fonts from a single workgroup.

Installing, Enabling, and Disabling Universal Type Server Plug-ins

Universal Type Server includes plug-ins for Illustrator, InCopy, InDesign, Photoshop, and QuarkXPress.

NOTE: The plug-ins for Photoshop, Illustrator, and InDesign also include the Extensis Font Panel.

When you install the Universal Type Client, the plug-ins are automatically installed for your existing design software, inside the Plug-ins folder for each Adobe application and in the XTensions folder for QuarkXPress.

If you are configuring a new workstation, you should install your design applications *before* installing Universal Type Client.

If you install applications after installing Universal Type Client, you can install the plug-ins for the new software.

To install plug-ins on Mac OS X:

1. Start the Universal Type Client installer.
It is important to use the same installer that was used to install the Type Client.
2. Click **Continue** in the Welcome screen, then click **Continue** in the License screen, then click **Agree**.
3. Click **Customize**.
4. In the Custom Install screen, make sure **Install Plugins** is checked, then click the **Install** button.
5. When installation is complete, click **Close**.

To install plug-ins on Windows:

1. Open a command prompt window.
Choose **Start > Run**, type `cmd` and press **ENTER**.
2. Switch to the Universal Type Client directory (this is usually `C:\Program Files\Extensis\Universal Type Client\`, or on 64-bit Windows, `C:\Program Files (x86)\Extensis\Universal Type Client\`).
In the command window, type `cd "C:\Program Files\Extensis\Universal Type Client\"` (with the quotes) and press **ENTER**.
3. Type `FontManagementUI /install` and press **ENTER**.
4. Type `exit` and press **ENTER** to close the command window.

Enabling and disabling plug-ins

You can enable and disable the plug-in for an application from within the application itself.

In Adobe InDesign, InCopy, and Illustrator:

1. Choose **Type > Universal Type Client > Universal Type Auto-Activation Preferences**.
2. Check (to enable) or clear (to disable) the box labeled **Enable Universal Type Auto-Activation**.
3. Click **OK** to accept the change and close the dialog.

In QuarkXPress:

1. Choose **Utilities > Universal Type Client > Universal Type Auto-Activation Preferences**.
2. Check (to enable) or clear (to disable) the box labeled **Enable Universal Type Auto-Activation**.
3. Click **OK** to accept the change and close the dialog.

You can also use the built-in Xtensions Manager; choose **Utilities > Xtensions Manager** and check or uncheck **Font Auto-Activation Plug-in**.

In Adobe Photoshop:

1. Choose **File > Automate > Extensis**.
2. Click **Preferences**.
3. Check (to enable) or clear (to disable) the box labeled **Enable Universal Type Auto-Activation**.
4. Click **OK** to accept the change and close the Preferences dialog.
5. Click **OK** again to close the Universal Type dialog.

Saving Font Sense Metadata with Documents

Font Sense is designed to ensure that the precise fonts used in a document are automatically activated each time the document is opened. If you use Font Sense consistently, and make the appropriate fonts available to others, you should never encounter missing fonts, font conflicts, or confusion regarding multiple versions of the same font.

When you get started using the plug-ins, many documents will not have Font Sense information saved with them. In an environment where you receive many documents and fonts from outside, it is worth your time to save Font Sense data within your documents.

To add Font Sense data to existing documents:

1. Set up a “preflight” workstation to handle all incoming documents.

NOTE

The workstation should have a copy of Universal Type Server, all the applications you support with the Universal Type Server plug-ins enabled (QuarkXPress, Illustrator, InDesign, Photoshop, and InCopy), and **Enable Font Sense support** is enabled in the **Universal Type Auto-Activation Preferences** for each application. Users manning the workstation should be workgroup or font administrators.

2. Add each document’s fonts to a workgroup as a set. Activate only that set; be sure that no other fonts are active through Universal Type Server.
3. Open the document with the plug-in running.
4. Make a small change to the document and save it. This records the Font Sense metadata within the document.
5. Use the **Create Document Set** command to create a set for the document.
Create Document Set is available from the **Type > Universal Type Client** menu in Adobe Illustrator, InDesign, and InCopy, and from the **Utilities > Universal Type Client** menu in QuarkXPress. In Adobe Photoshop, the **Create Document Set** command is accessed from the Universal Type Client dialog; choose **File > Automate > Extensis** to open the dialog.
6. Share the document set so that all users in the workgroup have access to the fonts.
7. Close the document.

NOTE

You can also preflight any existing documents that do not have Font Sense data. Let the plug-ins automatically activate the “best” fonts or choose the fonts yourself. Then save the documents to record Font Sense metadata with them.

Automatically Activating Fonts

When you open a document with Font Sense metadata, the plug-in automatically activates the precise fonts used in the document, provided the fonts are present in the workgroups that you specify.

When you open documents containing Font Sense metadata and the fonts are available, you should never experience missing fonts, font conflicts, or issues with multiple versions of the same font. In general, the plug-ins work seamlessly in the background. Once you choose a workgroup, you can begin opening documents with confidence that all the right fonts will be available.

Selecting an Auto-Activation Workgroup

When you start an application, *before* you open any files, choose the workgroup you want to use as the source for automatically activated fonts. To select a workgroup:

- In Adobe Photoshop, choose **File > Automate > Extensis**, then select a workgroup using the **Select Workgroup** drop-down menu.
- In Adobe Illustrator, InDesign, and InCopy, choose **Type > Universal Type Client > Select Workgroup**, then choose the desired workgroup from.
- In QuarkXPress, choose **Utilities > Universal Type Client > Select Workgroup**, then choose the desired workgroup.

The workgroup functions as follows:

- When you open documents, the plug-in automatically activates fonts within the selected workgroup.
- You can change workgroups at any time, even while a document is open and fonts are active.
- If you have permission to **Activate Fonts Across Workgroups**, you can select **All Workgroups** to automatically activate fonts in all the workgroups you belong to.
- If you do not have the **Activate Fonts Across Workgroups** permission, you can activate fonts in other workgroups manually through the Universal Type Client.
- If you open a document and all the fonts are reported as missing, you may have the wrong workgroup selected. Switch workgroups and then check the document's fonts. To select a different workgroup:
 - In Adobe Photoshop, access the **Select Workgroup** drop-down menu and other commands from the Universal Type Client dialog. Choose **File > Automate > Extensis** to open the dialog.
 - In Adobe InCopy, InDesign, or Illustrator, choose **Type > Universal Type Client** to access the **Select Workgroup** submenu and other commands.
 - In QuarkXPress, choose **Utilities > Universal Type Client** to access the **Select Workgroup** submenu and other commands.

NOTE

When you're using the Universal Type Server plug-ins, it's helpful if you design documents with fonts from only one workgroup. If you use fonts from multiple workgroups in the same document, you cannot be guaranteed that all the users who work on the document have access to those fonts. In addition, the plug-ins are only able to auto-activate fonts and make font sets for fonts in a single workgroup. They can, however, collect fonts for output from multiple workgroups.

Scanning Documents for Fonts

When you open a document that contains Font Sense metadata, the Universal Type Server plug-in scans the document to see what fonts are used in it, and then automatically activates precisely those fonts (provided the fonts reside in the selected workgroup). The following fonts are considered to be "used" in a document:

- Fonts applied to text.
- The font specified in the application's Normal style sheet.
- Fonts applied to text on master pages, whether or not the master pages are applied to document pages.

NOTE

By default, the Universal Type Server plug-ins activate individual instances of fonts rather than all the fonts in entire typeface families. For example, if a document requires Minion-Bold, a plug-in would activate only Minion-Bold, not the entire Minion family. You can, however, choose to activate entire suitcases by enabling the **Activate entire font family** in the **Universal Type Auto-Activation Preferences**.

Scanning Graphics for Fonts

For complete automatic font activation, the Universal Type Server plug-ins can scan graphic files imported into documents and activate the fonts used in them. The plug-ins will consult any Font Sense metadata saved with graphic files for the most accurate automatic activation. If Font Sense data is not available for a graphic file, the plug-ins identify fonts by name.

NOTE: Currently, Font Sense metadata is saved with EPS files exported from Illustrator and Photoshop documents with un rasterized text layers.

Handling Missing or Unavailable Fonts

Missing Fonts

If you open a document and a **Missing Fonts** dialog is displayed, first make sure you have the appropriate workgroup selected in the plug-in. If switching workgroups doesn't solve the problem, note the details about the missing fonts and discuss the problem with a system administrator. Ideally, someone can acquire the missing fonts and add them to the appropriate workgroups.

Unavailable Fonts

If fonts can't be activated due to a licensing restriction, you will be alerted and no fonts in the document will be activated.

When the document is open, use **Check Document Fonts** to retry auto-activation.

- In Adobe Photoshop, choose **File > Automate > Extensis**, then click **Check Document Fonts**.
- In Adobe Illustrator, InCopy, or InDesign, choose **Type > Universal Type Client > Check Document Fonts**.
- In QuarkXPress, choose **Utilities > Universal Type Client > Check Document Fonts**.

If this doesn't work, close the document without saving any changes and contact your server administrator.

Picking the “Best” Fonts

If you open documents that contain Font Sense metadata—and the appropriate workgroup is selected—you should rarely encounter missing fonts. In some cases, however, you may be missing the precise font. If other fonts are available with the same name, the plug-ins can automatically activate the “best” font for you to use (be sure to enable **Pick best match when original is missing** in **Universal Type Auto-Activation Preferences**). The best font will be used in the document and its information will be recorded in the Font Sense metadata for future use.

In determining the “best” font, the plug-ins prefer (in order of importance):

- An active font over an inactive font (except for active system fonts)
- The Type in the Font Sense metadata; if that does not exist, OpenType is preferred over PostScript, which is preferred over TrueType
- The Foundry in the Font Sense metadata; if that does not exist, Adobe is preferred over other foundries
- Higher versions are preferred over lower versions

NOTE

Although it's convenient to have Universal Type Server select fonts for you, keep in mind that the “best” font is not always the correct font. This is particularly true when you consider that Universal Type Server's first preference is for active fonts over inactive fonts. For example, if you keep a TrueType version of Helvetica permanently active, and a document requires a PostScript version of Helvetica, Universal Type Server will opt for the active TrueType version—even if you have other PostScript versions of Helvetica.

Deactivating Automatically Activated Fonts

When you quit an application, any fonts that were automatically activated for that application are deactivated. You can change this so that auto-activated fonts are deactivated when you close the document that uses them, or when you shut down your computer or disconnect from Universal Type Server.

Checking Document Fonts

Any time you want to ensure that all the fonts used in a document are active, you can use the **Check Document Fonts** command. For example, if you drag an InDesign snippet onto a page or update a QuarkXPress composition zone, the fonts used in those items may not be active. Or, if you apply a previously unused style sheet to text, the font specified in it may not be active.

To check document fonts:

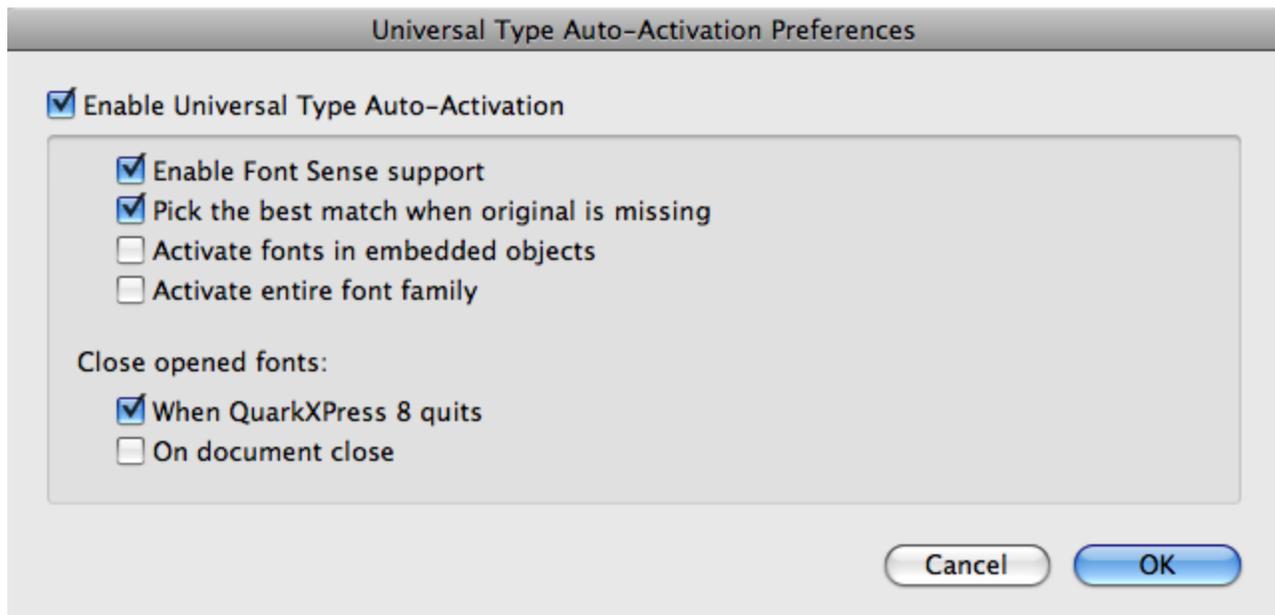
- In Adobe Photoshop, choose **File > Automate > Extensis**, then click **Check Document Fonts**.
- In Adobe Illustrator, InCopy, or InDesign, choose **Type > Universal Type Client > Check Document Fonts**.
- In QuarkXPress, choose **Utilities > Universal Type Client > Check Document Fonts**.

Changing Universal Type Auto-Activation Preferences

Each application's plug-in has its own preferences that control how it works. By default, the plug-ins activate fonts according to Font Sense metadata when documents are opened, save detailed Font Sense data within documents, and deactivate auto-activated fonts when you close documents. As you use a plug-in, you may find that a default setting is not appropriate for your workflow.

To change the settings for a plug-in, use the **Universal Type Auto-Activation Preferences** dialog.

- Photoshop: **File > Automate > Extensis**, then click **Universal Type Auto-Activation Preferences**.
- Illustrator, InCopy, and InDesign: **Type > Universal Type Client > Universal Type Auto-Activation Preferences**.
- QuarkXPress: **Utilities > Universal Type Client > Universal Type Auto-Activation Preferences**.



Enable Universal Type Auto-Activation

When this option is checked, the plug-in will scan documents as you open them to determine the necessary fonts. The plug-in identifies fonts by looking at the document's Font Sense data if it is present, or looking at the document's fonts by name.

Use Font Sense

By default, the plug-in saves detailed Font Sense metadata within documents, and then uses that information to automatically activate fonts. In general, using Font Sense results in superior automatic font activation.

Pick the best match when original is missing

When you're using automatic activation and a font conflict occurs, the plug-in automatically picks the "best" font. Font conflicts may arise if more than one font in the selected workgroups has the same name, such as Helvetica or Times, and the plug-in is unable to determine which font was used to create the document. If you prefer to resolve conflicts yourself, disable this option.

For more information about how the "best" font is chosen, see **Picking the "Best" Fonts** on page 25.

Activate fonts in embedded objects

When this option is enabled, the plug-in looks at the Font Sense metadata saved in certain embedded objects to automatically activate fonts. The following table shows which application plug-ins scan which embedded object types.

Embedded object	Plug-ins			
	Illustrator	InDesign/InCopy	Photoshop	QuarkXPress
Photoshop document*	Yes	Yes	No	No
EPS graphic**	No	Yes	No	Yes
Illustrator document	No	Yes	No	Yes
PDF***	Yes	Yes	No	Yes
InDesign document	Yes	Yes	N/A	N/A
QuarkXPress document	N/A	N/A	N/A	Yes

* Photoshop documents with unrasterized text layers.

** EPS files exported from Illustrator.

*** PDF files saved from Illustrator with Illustrator Editing option enabled.

NOTE: This option is not available in the Illustrator and Photoshop plug-ins; the Illustrator plug-in always activates fonts in embedded objects, and the Photoshop plug-in never does.

Activate entire font families

By default, the plug-in activates individual font faces rather than all fonts in a typeface family. For example, if a document requires Minion-Regular, a plug-in would activate Minion-Regular, but not Minion-Bold or Minion-Italic.

If you enable this option, then all members of a font family will be activated, whether or not they are used in the document. This can be helpful if you plan to use other styles or variants in your document; those members of the font family will already be active.

To see all the fonts in a family in the Universal Type Client, choose **View > Group Fonts by Family**.

NOTE: Users with permission to modify families can change family groupings in Universal Type Server.

Close opened fonts

You can specify at what point auto-activated fonts get deactivated. To change this setting, click an option in the **Close opened fonts** area.

- **When [application] quits:** Quitting the application deactivates all the fonts that were auto-activated since you started it. This is the default setting.
- **On document close:** This option deactivates auto-activated fonts when you close a document (except fonts that are used in other open documents). Enable this option if you need to keep a minimum of fonts active and if most of your documents use different fonts. Because Universal Type Server will scan every open document when you close one, this setting can get tedious if you open and close documents often.
NOTE: A change to this setting will not apply to currently open documents.

The Extensis Font Panel

Universal Type Client includes the Extensis Font Panel for Adobe Photoshop, Illustrator, and InDesign CS6 and later. The Font Panel offers a convenient way to select and activate your fonts directly within your creative applications.

NOTE: The Extensis Font Panel for CS 6 applications uses Adobe Flash. Visit the Adobe website to download the latest version of Flash Player.

Opening the Font Panel

To open the Extensis Font Panel, choose **Window > Extensions > Extensis** in Adobe Photoshop, Illustrator, or InDesign.

You can move, collapse, or group the Extensis Font Panel just like you do other panels within Adobe applications.

Activating and deactivating fonts

When you select a font in the Font Panel, it is activated.

If you apply a font from the Font Panel to text in your document, then save the document, Font Sense data for that font will be saved with the document, and that font will be automatically activated the next time you open the document. (Font Sense data will only be saved if you haven't disabled this option.)

When you quit the application, the font is deactivated (unless it is in use in another application).

Font digests

You can create font digests with fonts from multiple workgroups.

To create a font digest:

1. Click the **Add** button at the top of the Font Panel.
The panel will show a hierarchy of all the font groups you have available.
2. Check the box next to a set or workgroup to include those fonts in your digest.
The pane at the bottom of the Font Panel lists all the fonts you've included so far as well as showing how many fonts you have selected.
3. Type a name for the Font Digest at the top of the Font Panel, then click **Done** to create your digest.
Font digests are added to the pop-up menu of font groups.

To remove a digest, select it from the pop-up menu and click the **Remove** button.

To edit a digest, select it in the list and click the **Edit** button. Check the boxes next to sets or workgroups to add those groups of fonts to the digest. Clear checked boxes to remove fonts from the digest. Click the **Done** button when you are finished editing.

NOTE: Font digests will be available in the Font Panel in all supported design apps.

Typekit fonts

You can use Typekit fonts from the Extensis Font Panel by choosing Typekit from the pop-up menu of available font groups.

You can add Typekit fonts to your font digests. If you remove a Typekit font from your desktop, it will also be removed from your font digests.

Applying a font

In Adobe Photoshop, you can apply fonts from the Extensis Font Panel to individual type layers.

In InDesign and Illustrator, you can apply a font to a text block or selected text.

To apply a font from the Extensis Font Panel:

1. Open the Extensis Font Panel.
2. Select the desired font group.
3. Select the text you want to change.

In Photoshop, choose the **Move** tool, then select the type layer.

Using InDesign or Illustrator, select some text, or choose the **Selection** tool and select one or more text blocks.

Click the desired font in the Extensis Font Panel.

Modifying type

Once you have applied a font from the Extensis Font Panel, that font becomes activated for your current session, and the font and its styles will appear in your design application's **Font** and **Style** drop-down menus. You can use the font just as if it were any other font activated by Universal Type Client. In particular, you can:

- Apply the font to any selected text, using the **Font** menu.
- Change the size of the applied font by selecting the desired text and choosing a new size from the **Font Size** menu or entry field.
- Apply a different style by selecting the desired text and choosing a style from the **Style** menu.

The Universal Type Core

The Universal Type Client communicates with the server through a background application called Universal Type Core. The Universal Type Core starts automatically when you log in to your computer.

The Universal Type Core takes care of font activation and deactivation transparently, so you do not need to run Universal Type Client in order to keep fonts active.

You can stop the Universal Type Core manually, although you will only need to do this in a trouble-shooting situation.

To stop the Universal Type Core, open the Preferences window, click the FMCore tab, and click the **Stop FMCore** button.

Understanding Font License Compliance

Font foundries and vendors recognize the need for fonts to be distributed in workgroups and for high-quality output. For this reason, fonts are usually sold with a license for more than one user. However, the number of licenses granted is not infinite; you can't legally install a font on all the computers in your organization without purchasing a license for each computer.

Part of the function of Universal Type Server is to help your compliance officer, IT department, or other responsible persons ensure that no more than the number of available font licenses for any given font are in use at any given time. Universal Type Server gives your server administrator the option of enforcing compliance automatically (by

disallowing users to activate a font if all its licenses are in use) or manually (by receiving an alert when a font has been activated more times than there are available licenses).

Thus, Universal Type Server allows your organization to enforce font licensing in the way that suits it best. If your server administrators opt for automatic enforcement, a user that can't activate a font because all its licenses are in use will be notified, and can immediately seek a solution. If your administrators opt for manual enforcement, the server administrator will be notified if you try to activate a font beyond its available licenses. It is then up to them to investigate the usage and remedy the situation as they see fit: by removing the font's availability from one or more users, purchasing additional licenses, or other means.

If you receive a message that you can't activate a font because its licenses are all in use, you should try again shortly (in the event that someone was just finishing up with that font and will release its license), or notify your server administrator, so they can help you get access to the font in question.

Adding, Deleting, and Collecting Fonts

User permissions within each workgroup control whether you can add, delete, and/or collect fonts. If you belong to more than one workgroup, the permissions may vary among them—so you might be able to add fonts to one workgroup but not another. The administrator should let you know which workgroups you belong to and what permissions they have. Adding, deleting, and collecting work as follows:

- You add fonts to one workgroup at a time.
- You can add fonts individually or as named sets. The Universal Type Client lets you drag fonts into a workgroup or browse to a specific location to add fonts.
- Universal Type Server does not add orphan font files and it attempts to repair any font corruption issues.
- If any fonts are identified as potentially corrupt, and you have a personal workgroup, you are given the option to add the corrupt fonts to your personal workgroup.
- If you have permission to add fonts to a workgroup, you can also delete fonts.
- If you have Collect Fonts for Output permission in a workgroup, you can collect or export fonts from Universal Type Client and from design applications using the auto-activation plug-ins.
- If you have a personal workgroup, you can always add, delete, activate, and collect the fonts in your personal workgroup.
- If you have the Full Administrator setting enabled, you can perform all these functions in that workgroup.

Adding Fonts

If you have permission to add fonts to the selected workgroup, you can add fonts via drag-and-drop or choose **File > Add Fonts**. The fonts you add will be available to other members of the workgroup. While adding fonts, Universal Type Server scans them to collect information and check for corruption.

NOTE

Universal Type Server does not add orphan bitmap or orphan outline fonts. In addition, some repairs are made as fonts are added. See **Activating and Deactivating Fonts** on page 16 for more information.

Adding from a Mac OS or Windows Client

You can add cross-platform OpenType fonts from a Mac OS or Windows computer's Universal Type Client.

Platform-specific fonts, however, need to be added from the proper operating system. For example, if you're adding Mac OS PostScript fonts, you need to add them from a Mac OS Universal Type Client.

Adding Fonts Individually

Universal Type Server makes it easy to add fonts by searching through volumes, folders, and files to locate font files for you.

To add fonts to a workgroup:

1. Launch the Universal Type Client.
2. Select any item containing fonts—your hard drive, CDs, flash drives, network volumes, folders, or files—on the desktop.
3. Drag your selection into the **Fonts** pane to add them to the selected workgroup. You can also drag fonts onto a workgroup name or into a set within a workgroup.

NOTE: If the **File > Add Fonts** command is gray, you do not have the necessary user permission to add fonts to the selected workgroup.

Adding Fonts as Sets

To retain any current organization you have for fonts—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. The individual fonts are available to the entire workgroup and you can share the sets with the workgroup (if you have share sets permission).

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

- Choose **File > Add Fonts**, or press Command-L (Mac) or Ctrl-L (Windows). Use the **Add Fonts** dialog to locate and select a folder of fonts, then click the **Add** button. 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.

NOTE

Universal Type Client lets you create nested sets (sets within sets), but it does not automatically create them as you add folders of fonts. All the fonts within a folder will become a single set even if many folders of fonts are nested within the first folder. If you need to add nested folders as individual sets, select those folders and add them independently.

Scanning Fonts to Add

When you add fonts, Universal Type Server performs a scanning process that finds, examines, and organizes all the fonts. The amount of time the scan takes depends on a variety of factors, including: the number of fonts you're adding, the speed of your computer, the speed of your connection, and the media the fonts are stored on.

- The progress of the scan displays in the **Activity** area across the bottom of the Universal Type Client. You can see a Progress indicator information about the operation such as **Searching for Fonts** or **Processing Files**.
- Double-click the **Progress** icon to display the **Activity** window, which shows you the status of each font file being added. You can also choose **Window > Activity Viewer** (Mac) or **Tools > Activity Viewer** (Windows), or press Command-0 [the digit zero] (Mac) or Ctrl-0 (Windows).
- Click the **Stop** button  in the **Activity** area at the bottom of the Universal Type Client to stop adding the fonts. The fonts that are already added will remain in Universal Type Client. You can also click the **Stop** button for an individual font in the **Activity** window.

Sharing Fonts with Other Workgroups

Once fonts are in a Universal Type Server workgroup, you can use them in other workgroups as well. Only one copy of a font resides in Universal Type Server's database, but you can make the font available to as many workgroups as you wish. To share fonts with another workgroup, you must be a member of both workgroups and have permission to add fonts to target workgroup, and collect fonts from the source workgroup. (Full Administrators can always share fonts among workgroups.)

To share fonts with another workgroup:

1. In the Universal Type Client, select the source workgroup (the one containing the fonts you want to move to another workgroup).
2. Select the fonts or sets you want to copy to the target workgroup.
3. Drag your selection onto the target workgroup name.

The fonts become members of both workgroups, but are not duplicated.

NOTE

You can't actually move fonts from one workgroup to another. To accomplish this, copy the fonts to the target workgroup, then delete them from the source workgroup.

Resolving Font Problems

When fonts are added to Universal Type Server, the scanning process and the information collected help you clean up your font library and make sure all your fonts are usable. Universal Type Server does not add corrupt, orphan bitmap or orphan outline fonts. Duplicate fonts may still cause problems, so it is best to proactively manage your duplicates.

Corrupt Fonts

Corrupt fonts are often the source of crashes and other problems. Universal Type Server defines a corrupt font as any font for which the font resources cannot be opened, appear to contain inconsistent information, or have incorrect values in important fields of the font file resource.

Universal Type Server scan fonts at two points: when it is added, and when it is indexed for use by QuickMatch.

Adding corrupt fonts

If Type Server detects a corrupt font when you add it, it will do one of the following:

- Fix the problem and add the font to the workgroup;
- Ignore the problem and add the font to the workgroup;
- Determine that the font is corrupt beyond repair and not add the font.

Most of the time, if a font is corrupt, it cannot be repaired. However, there are certain types of minor problems that can be corrected, and there are certain types of problems that can be safely ignored.

If a font is corrupt, you'll be notified that it can't be added to the server. If you have a local personal workgroup, you will be given the option to add the corrupt font to a new set in your local workgroup.

Indexing corrupt fonts

Universal Type Server generates performs a different type of scan when it indexes fonts for QuickMatch. Sometimes a corrupt font found during this type of scan will cause Universal Type Client to crash. If this happens, re-start Type Client. Any font that caused a crash during a QuickMatch scan will be *blacklisted*, and will be indicated in the **Fonts** pane by a red dot in the Activation column.

Such a crash may be caused by a corrupted glyph in the font. If you want to investigate this further, you can select the corrupt font, choose **Edit > Render Problem Font** (which clears the blacklist flag), then perform a QuickMatch using a set of characters that you specifically want to check for corrupt glyphs.

Duplicate Fonts

In Universal Type Server, a “duplicate font” is a font with the same Font Sense ID—meaning the exact same name, foundry, type, version number, FOND ID, kerning table, and outline file size as another font in Universal Type Server.

Since the criteria for duplicate fonts is so specific, you may see several fonts with the same name in a workgroup. Often, it’s a simple matter of having two different versions of the same font. In general, workgroups should have only one version of each font. To pare your workgroups down to one version of each font:

1. Choose **Edit > Find Fonts**, or press Command-F (Mac) or Ctrl-F (Windows).
2. Choose **Duplicates** from the drop-down menu. This option shows different versions of the same font in the selected workgroup.
3. If necessary, click the **Name** column to sort fonts alphabetically, and disable **View > Group Fonts by Family** (Command-E on Mac; Ctrl-E on Windows).
4. Try to determine the differences between the fonts. If you need to display more information, choose options from **View > Columns**.
5. Once you determine the differences, decide which font to keep and delete the other font from the workgroup. See **Deleting Fonts** below.

TIP: Before deleting, create a backup of the fonts by collecting them to other media.

If you need multiple versions of the same font in a workgroup—for example, in a workgroup for advertisers’ fonts—you can leave “duplicates” in the workgroup.

Deleting Fonts

If you have permission to add fonts to a workgroup, you can also delete fonts in that workgroup. You can delete fonts for any reason—whether they’re outdated, corrupt, orphans, unused, unlicensed, etc. The fonts you delete are removed from the workgroup instantly and no longer display in the Universal Type Client. However, if they are active on users’ computers, they stay active until the users disconnect from Universal Type Server.

Understanding Font Deletion

The consequences of deleting fonts in multiple workgroups, fonts in a single workgroup, and sets are different:

- If you delete a font that belongs to multiple workgroups, it is only deleted from the current workgroup.
- If you delete a font that is exclusive to the current workgroup, it is deleted from Universal Type Server entirely.
- Deleting a set only deletes the folder containing the references to the fonts; it does not delete fonts from the workgroup. (Depending on your permissions, you may not be able to delete shared sets.)

Deleting Fonts from a Workgroup

Before deleting fonts, notify any users who may be using the fonts or may need them in the future. If deleted fonts are active on users’ computers, they stay active until the users disconnect from Universal Type Server. If users are offline, the fonts are removed when they return online and synchronize with the server.

To delete fonts:

1. Launch Universal Type Client and select a workgroup.
2. Select the fonts, families, or sets you want to delete.
3. Choose **Edit > Delete from Workgroup**.
4. When the alert asks you to confirm the deletion, click **Remove** (Mac) or **Yes** (Windows).

NOTE: If the **Edit > Delete from Workgroup** command is unavailable, this means that you do not have the necessary user permission to delete fonts from the selected workgroup.

If you are a Full Administrator of your Type Server, you are also able to selectively delete fonts from any workgroup, including any user's personal workgroup. You can view all of the workgroups that contain a font using the font information attributes pane.

To selectively delete fonts from any workgroup:

1. Launch Universal Type Client and select a workgroup.
2. In the lower left corner of the window, click the **Font Information** button  to display the **Font Information** pane.
3. Select a single font face. The **Font Information** pane shows information for the selected face.
4. Select a workgroup name from the drop-down menu at the top of the pane. The **Workgroups** menu lists all of the workgroups that contain the selected font face. You must be a Full Administrator to view the personal workgroups of other users as well as workgroups you do not belong to.
5. Click the **Delete from Workgroup** button to remove the font face from the selected workgroup.

Deleting Fonts from All Workgroups

If you are logged in to Universal Type Client as a Full Administrator, the **All Server Fonts** workgroup lists all fonts available from your Type Server. You can delete a font from the server by deleting it from this workgroup.

Collecting Fonts

If you have permission to collect fonts from a workgroup, you can collect fonts to create copies that are independent of Universal Type Server. Usually, you collect fonts so you can supply them to an output provider. You have three options for collecting fonts:

- Using the **File > Collect Fonts for Output** command in the Universal Type Client to collect selected fonts.
- Collecting fonts for output directly from design applications using the auto-activation plug-ins.
- Dragging and dropping selected fonts.

Collecting Fonts from Design Applications

Universal Type Server provides auto-activation plug-ins for popular design applications—including Adobe Illustrator, Adobe InDesign, and QuarkXPress—that add a **Collect Fonts for Output** command directly to the application. The Collect Fonts for Output feature creates a copy of all the fonts applied to text on printing pages in the active document (or layout).

When a document is finished and ready for delivery to a service bureau, you can collect fonts for output.

To collect fonts:

1. Open the document or select the layout and make sure no fonts are missing. The plug-ins cannot collect missing fonts.
2. Choose **Collect Fonts for Output**:
 - In Adobe Photoshop, choose **File > Automate > Extensis** and click **Collect Fonts for Output**.
 - In Adobe InDesign, InCopy, or Illustrator, choose **Type > Universal Type Client > Collect Fonts for Output**.
 - In QuarkXPress, choose **Utilities > Universal Type Client > Collect Fonts for Output**.
3. Use the directory dialog to navigate to a location for the new fonts folder.
4. Type a name for the folder in the field.
5. Click **Save**. Universal Type Server copies the fonts and places them in the new folder in the specified location.

You can deliver the folder of fonts to the service bureau or production department along with your other files.

NOTES

- If the **Collect Fonts for Output** command is not available, you do not have permission to collect fonts from the workgroups containing the required fonts. If possible, documents should be designed with fonts from a single workgroup to ensure that everyone working on the file has access to the same fonts.
- If you have permission to collect fonts from one workgroup, but not another, only the fonts that you have permission to collect are included.

Collecting Fonts from the Client

If you have permission to collect fonts from a workgroup, you can use the **Collect Fonts for Output** command to collect selected fonts.

To collect fonts for output from the Client:

1. Launch Universal Type Client and select a workgroup.
2. Select sets, families, or fonts in the workgroup.
3. Choose **File > Collect Fonts for Output**, or press Command-D (Mac) or Ctrl-D (Windows).
4. In the **Choose the destination for the collected fonts** dialog, navigate to any location you wish and click the **Choose** button.

Copies of all the fonts are placed in a folder named Collected Fonts in the specified location.

NOTES

- If the **Collect Fonts for Output** command is not available, you do not have permission to collect fonts from the workgroups containing the required fonts. If possible, documents should be designed with fonts from a single workgroup to ensure that everyone working on the file has access to the same fonts.
- If you have permission to collect fonts from one workgroup, but not another, only the fonts that you have permission to collect are included.

Collecting Fonts with Drag and Drop

If you have permission to collect fonts from a workgroup, you can collect select fonts by dragging them out of the Universal Type Client on Mac OS X.

To collect fonts on Mac OS X:

1. Launch Universal Type Client and select a workgroup.
2. Select any sets, families, or individual fonts you want to collect.
3. Drag your selection to the desktop or any media such as a flash drive.

A copy of all the fonts is placed in a folder called Collected Fonts in the specified location.

NOTE

A plus sign indicates that you can collect the fonts to the selected location. If the plus sign does not display and the fonts bounce back, you do not have the necessary user permission to collect fonts. If you have permission to collect fonts from one workgroup, but not another, only the fonts that you have permission to collect are included.

Sorting and Finding Fonts

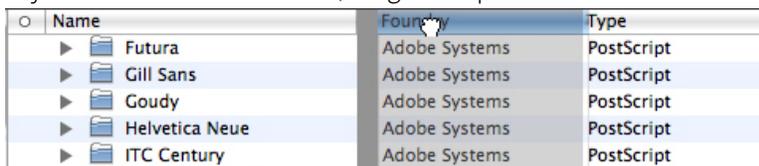
The Universal Type Client provides many options for displaying the fonts within a workgroup. You can decide which fonts to list and how much information you need about them (such as foundry, class, and version). In addition, you can arrange the columns of font information and sort fonts according to any criteria you prefer. The Universal Type Client also lets you list fonts individually (such as Minion, Minion Bold, Minion Italic, etc), or by typeface family (Minion).

The **Find** panel in Universal Type Client let you quickly display specific collections of fonts within a workgroup. For example, you can display only OpenType fonts, only active fonts, or only PostScript Serif fonts by Adobe. If you need to find the same collections of fonts over and over again, you can save find criteria as “smart sets,” which update to display all the fonts in a workgroup that match the smart set criteria.

Working with Columns of Font Information

The Universal Type Client’s Fonts pane can display a column of font information for each font that includes: Type, Foundry, Class, Family, Version, Font Sense (number), Added By, Date Added, Menu Name, and Licensed. By default, the Universal Type Client displays a column for Type, Foundry, Class, Family, Version and Licensed, in that order. You can display any combination of columns that is useful to you, arrange the columns so you can easily see the information you need, and sort fonts according to any column.

- **Display Columns:** Choose **View > Columns** or right-click a column heading to enable or disable columns of font information. If necessary, scroll to the right or expand the Universal Type Client window to see all the columns.
- **Arrange Columns:** Drag the column headings (such as **Type** or **Version**) to change the order of columns. To adjust the width of a column, drag the separator bar between the column headings.



Name	Foundry	Type
▶ Futura	Adobe Systems	PostScript
▶ Gill Sans	Adobe Systems	PostScript
▶ Goudy	Adobe Systems	PostScript
▶ Helvetica Neue	Adobe Systems	PostScript
▶ ITC Century	Adobe Systems	PostScript

- **Sort By Column:** Click a column head to sort fonts or families according to that information; for example, click **Class** to sort alphabetically by classification.

TIP: If you need to see a font’s keywords or styles, or more details about a font’s licenses, select a font and display the **Attributes** pane (**View > Show Attributes**).

Grouping Fonts By Family

Rather than list fonts individually in the Fonts pane, the Universal Type Client can group fonts by typeface family. When fonts are grouped by family, you can perform font management activities on the entire family in one operation, including activating and deactivating, adding fonts to sets, changing font attributes, and collecting fonts.

To group fonts by family:

- Choose **View > Group Fonts by Family**, or
- Press Command-E (Mac) or Ctrl-E (Windows).

To view and work with fonts in a family:

- To view the fonts within a family, click the arrow next to a family’s folder.
- If you are displaying fonts according to specific find criteria, such as foundry, only fonts that fit the criteria are displayed within each family.
- To perform an operation on an entire family, such as activating it, click the family’s folder.

Understanding Family Groupings

When Universal Type Client groups fonts into a family, it uses the following criteria:

- **Name:** Fonts with the same family name.
- **Foundry:** Fonts are from the same foundry. Therefore, a Bauhaus font from Bitstream will be placed in a different family than a Bauhaus font from Monotype.
- **Type:** Fonts are the same type. Therefore, a PS Helvetica font will be placed in a different family from a TrueType Helvetica font.

These criteria often produce multiple families with the same name—such as a TrueType Times from Apple and PostScript Times from Adobe. To tell the difference between families, look at the **Type** and **Foundry** columns. In addition, if the current workgroup has two different versions of a font with the same name, foundry, and kind, they will be placed in the same family. For example, you might have two different versions of Garamond-Book in the Garamond family.

Regrouping Font Families

If the way Universal Type Client creates its typeface family groupings is not helpful to you, users with permission to modify families can move fonts into other families and rename font families. For example, some foundries such as Letraset name each instance of a font individually—so there is no family name for Universal Type Client to use. Moving fonts to another family affects the fonts in all workgroups.

To move fonts to other families:

1. Choose **View > Group Fonts by Family**, or press Command-E (Mac) or Ctrl-E (Windows).
2. Open a family containing fonts you want to move.
3. Select the fonts you want to move.
4. Drag the selected fonts to the new family.
5. To rename a font family, click its name and type a new name.

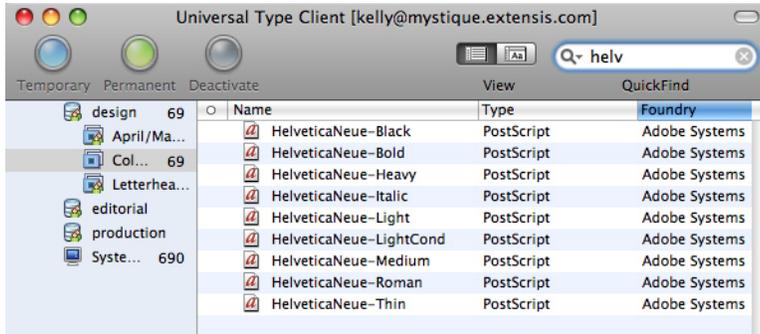
To revert fonts to the default families:

1. Select a font or family.
2. Choose **Edit > Restore Families**.

Using QuickFind

QuickFind is the fastest way to locate a font or family. Select a workgroup or set, click in the **QuickFind** field and starting typing the name; the **Fonts** pane automatically updates to list fonts or families starting with the text that you enter. Click the **Clear** button  on the **QuickFind** field to clear the field and list all fonts and families again.

TIP: You can use QuickFind on the “My Fonts” workgroup to quickly search in all the fonts available to you.



NOTE

If you do not see the **QuickFind** field, you may need to choose **View > Show/Hide Toolbar** (Mac) or **View > Toolbar** (Windows). On Mac OS X, if the toolbar is visible and you still cannot see **QuickFind**, choose **View > Customize Toolbar** and then drag **QuickFind** back to the toolbar.

Specifying Find Criteria

If you need to search for fonts by more than name, the **Find** panel gives you additional options. With this feature, you can search for fonts by any combination of attributes such as name, foundry, keywords, style, type, classification, and version. When you specify Find criteria, you specify the attribute (such as “foundry”), a qualifier for each attribute (such as “matches”), and a value to compare against (such as “Adobe” for a foundry). Your find can include an unlimited number of criteria.

To search with the Find panel:

1. Choose **Edit > Find Fonts**, or press Command-F (Mac) or Ctrl-F (Windows). The **Find** panel opens at the top of the Fonts pane.



2. Choose an option from the drop-down menu to specify whether you want to **Find fonts that match ANY of the following conditions** or **Find fonts that match ALL of the following conditions**. For example, do you want to find *only* fonts from Adobe that are OpenType PS, or do you want to find all fonts from Adobe *and* all OpenType PS fonts?
3. Choose an attribute from the first drop-down menu in the first row: Postscript Name, Menu Name, Family Name, Activation, Duplicates, Font Sense ID, Type, Version, Classification, Foundry, Keyword, Style, or Licenses.
4. Depending on the attribute you select, different drop-down menus and fields let you specify exactly what you're searching for. If you choose **Type** as the attribute, for example, you can choose **matches** or **does not match**, and then choose from a list of font types supported by Universal Type Server.
5. To add criteria, click the **Add** button . To remove a criterion, click its **Remove** button . As you add Find criteria, the **Fonts** pane updates to display only fonts in the selected workgroup that match the criteria.

At this point you can:

- Add or remove **Find** criteria to expand or reduce the number of search results.
- Select a different workgroup to execute your **Find** criteria against. The **Fonts** pane will be updated automatically with the new results.
- Click the **Save** button to save the **Find** criteria as a smart set.

To exit Find Fonts:

- Click the **Close** button in the **Find** panel.
- Press **ESC** to close the **Find** panel.
- Choose **Edit > Close Find** (Mac) or **Edit > Find Fonts** (Windows).
- Select a set in the **Workgroups** pane.

Using Smart Sets to Find Fonts

If you tend to find the same collection of fonts again and again—all OpenType PS Script fonts from Linotype, for example—you can save the find criteria as a smart set. When selected, a smart set automatically updates itself to display all fonts within the workgroup that match the find criteria.

NOTE: You can create smart sets in the “My Fonts” workgroup. These smart sets can include fonts from all your workgroups.

To create a smart set:

- **From find criteria:** If the **Find** panel is open and the find criteria are already set up, click the **Save** button . Double-click the new smart set that displays in the selected workgroup to rename it.
- **From scratch:** Click the **New Smart Set** button at the bottom left of the Type Client window. Use the **Find** panel above the **Fonts** pane to specify the smart set criteria, and double-click the new smart set that displays in the selected workgroup to rename it.

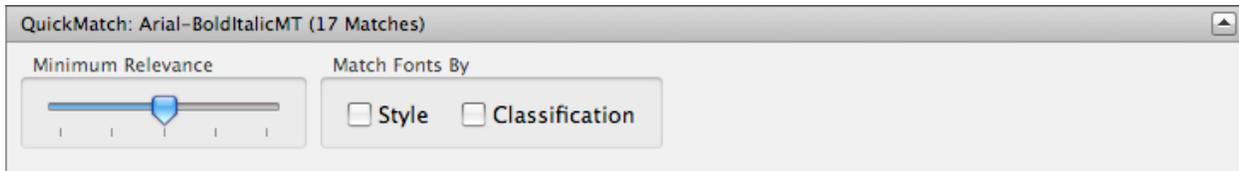
To edit the criteria for a smart set, right-click the set and choose **Edit Smart Set**.

Using QuickMatch to Find Visually Similar Fonts

QuickMatch allows you to find fonts in a workgroup that are visually similar to another font.

To use QuickMatch:

1. Select any Preview type (ABC 1 2 3, Waterfall, Paragraph, or QuickType).
NOTE: QuickMatch uses the characters in the Preview text to match against; if there are characteristic letters in the font you are matching, add those or enter those in the Preview text.
2. Select a font that you want to match.
3. Choose **Edit > QuickMatch**.
You can also right-click on the font you want to match and choose **QuickMatch** from the shortcut menu.



The Preview pane shows the fonts from the current workgroup that most closely resemble the selected font.

At this point you can:

- Change the number of results displayed by moving the **Relevance** slider left (to show more results) or right (to show fewer).
- Check **Style** to have QuickMatch only display fonts whose style matches your target font.
- Check **Classification** to have QuickMatch only display fonts whose classification matches your target font.
- Select another workgroup to search in; your original font will be matched against fonts in the newly-selected workgroup. The QuickMatch results will be updated automatically.
- Select a different font in the **Fonts** panel to match against. QuickMatch will restart automatically.
- Select a font in the **Preview** pane and add it to a set, or perform a QuickMatch using it as the target font to match against.

To exit QuickMatch:

- Click the **Close** button  in the **QuickMatch** panel.
- Press the **ESC** key to close the **QuickMatch** panel.
- Choose **Edit > Close QuickMatch** (Mac) or **Edit > QuickMatch** (Windows).
- Select a set in the Workgroups pane.

Viewing font info in the Attributes pane

When you select a single font face, the font information pane displays the workgroups that contain the font, as well as who added the font and when.

Typically the information pane displays only the workgroups to which you are a member. If you are a Full Administrator, you are also able to view all other workgroups that contain the font, including all other users' personal workgroups.

This is helpful if as an administrator you are trying to maintain font licensing compliance, and a user has added a font to a personal workgroup that brings your font usage beyond the number of licenses purchased. As a Full Administrator, you are able to select the user's personal workgroup and selectively delete the font face from his or her workgroup, thus bringing you back into compliance.

Favorites

Universal Type Client allows you to easily mark fonts as favorites, then use this when sorting or searching for fonts.

You can mark favorites in any workgroup.

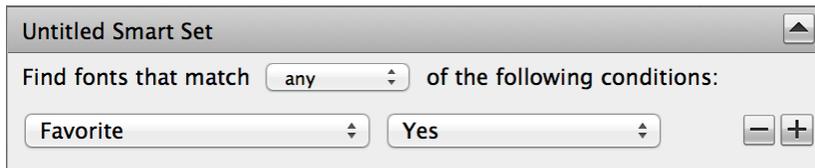
- **To mark a font as a favorite**, click the star ☆ icon in the Fonts list, in the Previews list, or in a floating preview pane.
Favorites appear with a “gold star” icon.
- **To clear a favorite**, click the star ★ icon again.

A Favorites smart set

If you create a smart set with your favorites, it will always reflect your current choices. When you mark a new favorite, it is automatically included in the set; when a font loses favor, it is removed.

To create a Favorites smart set:

1. Mark some fonts as favorites.
2. Choose **File > New Smart Set**.
3. In the Smart Set definition pane, choose **Favorite** from the first conditional pop-up menu, then choose **Yes** from the second.



4. Close the Smart Set definition pane.
5. Change the set name to something relevant, such as “Favorites.”

Previewing Fonts

While you're designing a document, you may need to identify a font by look rather than by name. To quickly show you what fonts look like, Universal Type Client displays live previews of fonts selected in the **Fonts** pane. You can edit the preview text, choose the type of preview, and adjust the size. For example, if you're creating a new client logo, you might preview the client's name in a variety of selected fonts.

Previews can also be “torn off” from the preview window to float above all other windows, or printed for further inspection and comparison.

In addition to traditional previews, Universal Type Client provides QuickComp, which lets you preview multiple fonts in one of a large selection of design-like layouts.

Displaying Previews

The Preview pane displays by default, but you can show and hide it as necessary. To see more previews, you can resize the Universal Type Client window and drag the divider between the Fonts pane and the Preview pane.

To display previews in Universal Type Client:

- Choose **View > Show Font Previews** (Mac) or **View > Previews** (Windows).
- Press **COMMAND-/** (Mac).

You can select fonts and families to preview in the **Fonts** pane.

Customizing Preview Text

You can display any text you want in the Preview pane by choosing an option from the Preview Type drop-down menu and entering new text.

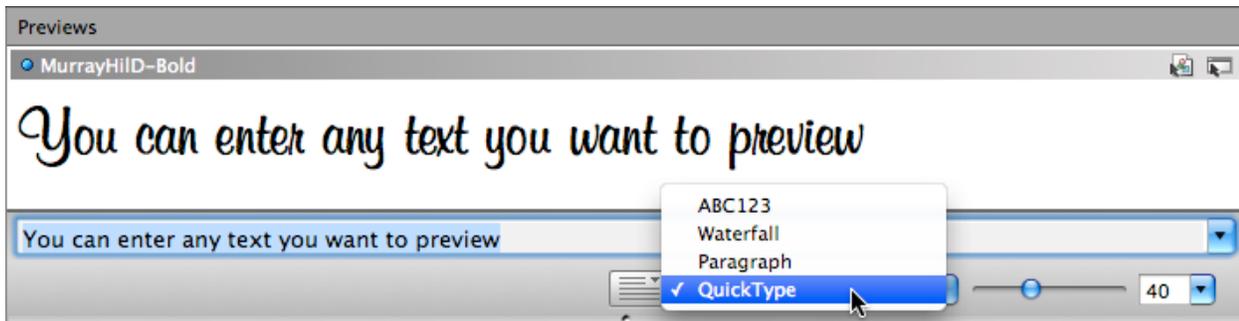
Preview Types

- **ABC 123:** Choose **ABC 123** to display the alphabet in uppercase, the alphabet in lowercase, and the numerals and symbols at the top of the keyboard.
- **Waterfall:** Choose **Waterfall** to display a partial alphabet and sample numerals at various sizes. Click the arrow to choose from a scrolling drop-down menu of other preview text options, including a full uppercase and lowercase alphabet, numerals, and a sentence.
- **Paragraph:** Choose **Paragraph** to display a full paragraph of text so you can judge the font's color.
- **QuickType:** Choose **QuickType** to quickly enter a line of text to preview. Click the arrow to choose from a scrolling drop-down menu of preview text options, including non-Roman character sets.

You can enter new text for the preview in the **Preview Configuration** field.

To display this field:

- Choose **View > Show Preview Configuration**, or
- Click the **Preview Configuration** button  at the bottom of the window.



NOTE

To revert to the default preview text for the active preview, click the **Revert Preview Text** button  below the **Preview** pane.

Customizing Preview Size

You can display fonts in all the **Preview Types** in a wide range of point sizes. Drag the Preview Size slider, type a size in the field, or choose a point size from the drop-down menu to see the selected fonts at different sizes.

For the **Waterfall** preview, samples are shown at your selected size as well as 33% smaller and 50% larger.

Floating Previews

Floating previews are helpful when you want to preview a number of fonts in the context of a project without activating the fonts. Floating previews are torn off from preview window, but still respond to any changes in preview type and type size. To be most useful, you will likely want to use this feature in conjunction with QuickType previews.

Until they are closed, floating previews always display on top of all other applications.

Tearing off a floating preview

To tear off a floating preview:

1. Choose one or more fonts in the Fonts pane.
2. If the preview pane is not displayed, choose **View > Show Font Previews** (Mac) or **View > Previews** (Windows).
3. To create a floating preview, drag the **Floating Preview** button  off the Universal Type Client window.

As you change preview type, text and size, the floating preview updates to reflect your changes.

Activating and deactivating

Just like all other font previews, you can activate or deactivate a font directly from the floating preview.

To activate or deactivate the font, click the activation status icon in the floating preview.

Closing multiple floating previews

If you have multiple floating preview windows on your desktop, it can be tedious to click the close icon on all of the previews. To make it faster to close multiple floating preview windows, they can be merged down into a single preview and then closed.

To close multiple floating previews:

1. Choose **Window > Floating Previews > Merge** or press Command-Option-M (Mac).
2. Click the **Close** icon on the floating preview.

Font Snapshots

You can “tear off” a preview and save it as a picture file, for use as a reference, for customer approval, or for use in a graphics application.

Previews are saved as 72ppi Portable Network Graphic (PNG) files with a transparent background.

To save a preview as a graphic:

1. Choose any type of preview.
2. Enter the text you want to use for the preview.
3. Select the font to preview.
4. Set the desired font size.
5. Drag the  icon in the preview’s title bar to the desktop or a folder.

The resulting file will be named for the font you are previewing.

NOTE: Font Snapshot is not available if you have read-only access to a workgroup.

Viewing Special Characters

If you need access to special characters that are not easily available from your keyboard, the Universal Type Client provides an easy way to open the Character Map on Windows or the Character Palette on Mac OS X. Both of these applications allow you to select and copy and paste characters from any active fonts for use in documents.

To open the **Character Map** or **Character Palette**, choose **Edit > Special Characters**.

The Universal Type Client also provides a method of revealing all of the glyphs available in a selected font, and comparing those glyphs to those in other fonts. See **The Glyph View Window** below for details on how to view and compare selected fonts.

The Glyph View Window

The Glyph View Window allows you to view and compare the glyphs from selected fonts. This can be helpful when:

- Comparing the details of a specific glyph in multiple fonts.
- Locating a specific character or symbol within a font.
- Determining how robust the character palette is in a font.
- Needing to know the Unicode value of a character.

To open the **Glyph View** window:

1. Select one or more fonts or font families in the Fonts pane.
2. Choose **Window > View Glyphs**.
3. In the **Glyph View** window, choose a font from the **Font List** drop down menu.
The entire font’s character set displays in the **Glyph View** window.
4. To narrow down the glyphs displayed, choose a code page from the **Show** drop-down menu.
5. Move the mouse pointer over a glyph to display that glyph’s Unicode number and if available, how to produce that glyph from the keyboard.
6. Double-click a glyph to add it to the list of saved glyphs.
7. Use the left and right arrows to display the next or previous font.

You can open multiple **Glyph View** windows in order to compare font glyphs side-by-side.

Printing Preview Pages

Even in our digital world, you sometimes just need to see something on paper for it to make sense. For this reason, Universal Type Client includes the ability to print sample pages of fonts in the preview window.

To print sample pages:

1. In the Fonts pane, select the fonts that you want to include in a printed sample page.
2. If the preview window is not displayed, choose **View > Show Font Previews**.
3. Customize the preview type, text and size. The sample pages include text across the width of a printed page using your text and size settings.
4. Choose **File > Print Preview Pane**.
NOTE If you have a large number of fonts in the preview pane, or a very large point size selected, it may take a long time and many pages to print.

Read-Only Workgroup Access

An administrator may give you read-only access to a workgroup. This allows you to see and search additional fonts that may not be available in your workgroup. In this way, your server administrators can let you search or browse through your organization's fonts without having to add a license for each person in the organization.

If you have read-only access to a workgroup, you can modify preview text, tear off preview windows, search, QuickMatch, and print samples of fonts, but you cannot tear off font snapshots, add fonts, create sets, or activate fonts.

QuickComp

QuickComp provides a variety of templates that allow you to preview multiple fonts in a design-like environment.

You can apply fonts to the composition sections, then create a font set and print the composition.

NOTE: Many of the QuickComp templates are designed as full-page layouts. It will be easier to work with QuickComp if you maximize the Universal Type Client window.

To use QuickComp:

1. Choose **QuickComp** from the **Preview Type** pop-up menu.
 2. Click a template in the **Template Gallery** to open it.
 3. Click a type block, then select a font to apply to the block.
- **To change type size for a selected block**, use the size controls at the bottom right.
 - **To change the template colors**, use the Text and Background color pickers.
To reset the colors to the defaults, click .
 - **To print your QuickComp**, choose **Print** from the tools  menu.
The printout includes a page summarizing the selected fonts.
 - **To create a set with the fonts used in your QuickComp**, choose **New Set** from the tools  menu.

Working with Sets

Within each workgroup, you can group fonts into “sets” for specific clients, jobs, or templates. Sets display in the **Workgroups** pane within each workgroup, and they help you organize fonts within a workgroup. Sets can contain one or many fonts, as well as other nested sets.

- All users can create sets. The sets are saved with Universal Type Server according to each user name. Therefore, if you connect to Universal Type Server from another computer, you will still see your own sets.
- You can create as many sets as you need, place sets within other sets, and place the same font in more than one set.
- Once fonts are in a set, you can manipulate the fonts as one unit. For example, you can activate all the fonts, deactivate all the fonts, or collect all the fonts for delivery to a service bureau (if you have permission to collect from the workgroup).
- If you have permission to share sets, you can share your sets with other members of your workgroup.
- If you have permission to modify shared sets, you can change the fonts in shared sets and delete shared sets.

Creating Sets

You can create an unlimited number of sets in each workgroup, and you can place an unlimited number of fonts into each set. Your sets are available whenever you connect to Universal Type Server, from any computer. You can create empty sets and drag fonts into them, you can add fonts as sets, you can create sets from open documents, and if you have permission you can share your sets with other members of the workgroup.

Creating Sets and Adding Fonts

Sets are created within the selected workgroup and contain only fonts within that workgroup.

To create a new set, you can do one of these:

- Choose **File > New Set**.
- Press Command-N (Mac) or Ctrl-N (Windows).
- Click the **Create Set** button .
- Select one or more fonts and choose **File > New Set from Selection**. (This creates a set that contains the selected fonts.)

The new set’s name is automatically selected so you can change its name.

To add fonts to a set:

1. In the **Fonts** pane, select the fonts you want to add to the set.
2. Drag the fonts to the set.

If you have permission to add fonts to the selected workgroup, you can also drag fonts from the desktop into a set. This adds them to both the workgroup and the set at the same time.

Creating Sets while Adding Fonts

If you have permission to add fonts to the selected workgroup, you can create sets while adding fonts. This helps you retain any current organization you have for fonts, such as folders for individual clients or projects. The individual fonts are available to the entire workgroup and you can share the sets with the workgroup (if you have share sets permission).

To create sets while adding fonts, you can do one of these:

- Choose **File > Add Fonts**, or press Command-L (Mac) or Ctrl-L (Windows), then select a folder of fonts and click **Add**. A set is automatically created from the folder you select.
- Drag folders of fonts onto a workgroup or set in the Workgroups pane of Universal Type Client.

NOTE

Universal Type Client lets you create nested sets (sets within sets), but it does not automatically create them as you add folders of fonts. All the fonts within a folder will become a single set even if many folders of fonts are nested within the first folder. If you need to add nested folders as individual sets, select those folders and add them independently.

For example, say you have a folder on your desktop called Magazine Articles that contains three folders: Editor's Letter, Features, and Departments. The folders contain the documents and fonts for each article. If you drag Magazine Articles into the **Workgroups** pane, Universal Type Server will add the fonts from all three folders and create a single set called Magazine Articles. If you want a set for each of the three folders, you need to create an empty set called Magazine Articles, and then drag the three folders for Editor's Letter, Features, and Departments into it.

Preventing Duplicate Fonts and Sets

Although Universal Type Server allows you to give sets the same name, and it allows you to place fonts with the same name in a single set, doing so can cause confusion. We recommend that you give sets unique names and avoid placing fonts with the same name in the same set (for example, two Helveticas from different foundries).

Creating Sets from Open Documents

Universal Type Server provides auto-activation plug-ins for popular design applications—including Adobe Illustrator, Adobe InDesign, and QuarkXPress—that add a **Create Document Set** command directly to the application. The Create Document Set feature creates a set consisting of all the fonts applied to text on printing pages in the active document (or layout).

For example, a 20-page newsletter in InDesign might use 90 or more fonts. Creating a set in the Universal Type Client and then locating and adding each font to it would be difficult and time consuming. The auto-activation plug-ins can find the fonts and create the set for you.

NOTE

When you're using the Universal Type Server plug-ins, it's helpful if you design documents with fonts from only one workgroup. If you use fonts from multiple workgroups in the same document, you cannot be guaranteed that all the users who work on the document have access to those fonts. In addition, the plug-ins are only able to auto-activate fonts and make font sets for fonts from a single workgroup. They can, however, collect fonts for output from multiple workgroups.

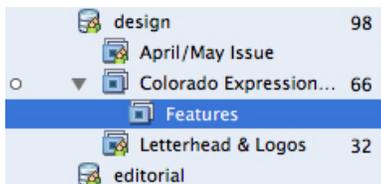
To create a set from a document:

1. Open a document and make sure all the fonts are active. (In QuarkXPress, open a project and select a layout.)
 2. Select the desired workgroup:
 - In Adobe Photoshop, choose **File > Automate > Extensis** and choose a workgroup from the **Select Workgroup** drop-down menu.
 - In Adobe InDesign, InCopy, or Illustrator, choose **Type > Universal Type Client > Select Workgroup** and select a workgroup.
 - In QuarkXPress, choose **Utilities > Universal Type Client > Select Workgroup** and select a workgroup.
- NOTE:** If you have permission to **Activate Fonts Across Workgroups**, you can choose **All Workgroups**.
3. Choose **Create Document Set** (from the Universal Type Client dialog in Photoshop, the **Type > Universal Type Client** submenu in Illustrator, InDesign, and InCopy, or the **Utilities > Universal Type Client** submenu in QuarkXPress).
 4. Type a name for the set in the field.
 5. Click the **OK** button.

If you have permission to share sets, you can share the set with other users. If the fonts in the file change, be sure to recreate the set or add the new fonts to the set manually.

Nesting Sets

When organizing fonts, you can place sets within other sets, then manipulate the sets individually or all at once. For example, if you're working on a magazine, you may have a set for the entire magazine that contains individual sets for each section. When you're printing a proof of the magazine, you can activate the entire set. However, if you're only editing one section, you can activate the set for that section.



You can nest sets indefinitely. This way you can create a few “master sets” for storing all your other sets. You can work with nested sets as follows:

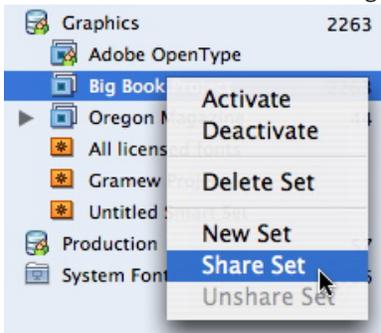
- **Creating New Nested Sets:** To create a new set within a set, select the parent set before you create the new set. If a set is selected, new sets are always created within it.
- **Nesting Existing Sets:** To nest an existing set, select it and drag it onto another set.
- **Removing a Set from its Nest:** To move a set outside its parent set, drag it above the set name.
- **Viewing Nested Sets:** To see nested sets, click on a set.

Sharing Sets

If you have permission to share sets, you can share a selected set with the whole workgroup. For example, if everyone in your workgroup is working on a specific book, you can create a set of fonts used in the book, and then share it. You can recognize shared sets by the little group of people added to the set icon.

To share a set:

1. Select the set in the **Workgroups** pane.
2. Choose **File > Share Set**, or right-click the set and choose **Share Set** from the shortcut menu.



When you share a set, you are effectively the owner of that set. You can rename it, add and remove fonts, nest it within other sets and so forth. If others in your workgroup need to be able to add and remove fonts from your set, be sure to tell your system administrator to enable the **Modify Shared Sets** permission for all users who need this ability.

When the workgroup is finished using the set, choose **File > Unshare Set**. Or, right-click the set and choose **Unshare Set** from the shortcut menu.

Moving, Copying, and Deleting Fonts in Sets

To move fonts between sets, drag the fonts from one set to the other.

To copy fonts, hold down the **OPTION** key (Mac) or **ALT** key (Windows), then drag the fonts from one set to the other.

To delete fonts from a set, select the fonts and press Command-Delete (Mac) or Delete (Windows), or choose **Edit > Delete from Set**.

NOTE: Deleting fonts from a set does not remove them from the workgroup or from your Type Server.

Renaming Sets

You can change the name of your sets anytime. If you have permission to modify sets, you can change the name of shared sets as well.

To rename a set, double-click the set name and type a new name.

Deleting Sets

You can delete entire sets, which will delete the set folder, nested sets, and fonts. Deleting sets does not require the workgroup to have delete permission because it does not remove the fonts from the workgroup or from Universal Type Server.

To delete sets:

1. Select the sets to delete.
2. Choose **Edit > Delete Set(s)** (Mac) or **Edit > Delete** (Windows), or press **COMMAND-DELETE** (Mac) or **DELETE** (Windows).

NOTE: When you delete a shared set from a workgroup, that set is removed for all users in the workgroup.

Working with Smart Sets

Universal Type Server provides a special kind of set that updates according to specific criteria. If you tend to search for the same collection of fonts again and again—all licensed OpenType PS from Font Haus, for example—you can

create a smart set. In this case, the smart set will display all the fonts in the workgroup for which Licensed is Yes, Type is OpenType PS, and Foundry is Font Haus.

To create a smart set:

- **From find criteria:** Choose **Edit > Find Fonts**, or press Command-F (Mac) or Ctrl-F (Windows). Specify the Find criteria (see **Specifying Find Criteria** on page 40), then click the **Save** button . Double-click the new smart set that displays in the selected workgroup to rename it.
- **From scratch:** Click the **New Smart Set** button  below the **Attributes** pane. Use the **Find** panel above the **Fonts** pane to specify the smart set criteria, and double-click the new smart set that displays in the selected workgroup to rename it.

To edit the criteria for a smart set, right-click the set and choose **Edit Smart Set**.

NOTE: Smart sets cannot be shared.

Using a Startup Set

The administrator can create sets of fonts within a workgroup that activate automatically every time you connect to Universal Type Server. This ensures that certain fonts are always active on your system. Each time you connect, all the fonts in startup sets from workgroups you belong to are activated. Active startup sets are indicated by a green dot on the set icon.

Fonts activated in startup sets cannot be overridden. Contact the administrator if you have questions or concerns about any of the fonts in a startup set.

If you have permission you can turn an existing set into a startup set for all users in the workgroup.

To make a startup set:

1. Select an existing shared set  in the **Workgroups** pane.
Because startup sets activate fonts for all members of a workgroup the startup set must be created from a shared set. For details on sharing sets, see **Sharing Sets** on page 50.
2. Choose **File > Startup Set**. This activates the fonts for all workgroup users.

If you have the permission to create startup sets, you also have the permission to disable the startup set. This turns the startup set into a regular set for all users, who are now able to deactivate and override fonts in the set.

To disable a startup set:

1. Select the startup set  in the **Workgroups** pane.
2. Choose **File > Startup Set**.

Font Attributes

A font's attributes are pieces of information about the font, especially as it is used in your organization. Most fonts come with pre-defined attributes (such as *Foundry*), and you can modify existing attributes and add new ones to aid in the way you organize and use fonts.

Attributes are applied to fonts, so they are consistent through all sets and workgroups.

Changing attributes does not affect the actual font file, only how it is used in Universal Type Server.

Available attributes are:

- **Classification:** A font's Classification (sometimes shortened to *Class*) describes its general look in historic terms. Each font can have only one classification. Universal Type Server assigns a classification when you add a font, but since this is a subjective assignment, you can change it.
- **Foundry:** The name of the company that licensed the font to you. Each font can have only one foundry assigned. Universal Type Server attempts to extract this information from the font, but you can modify it if necessary.
- **Keywords:** Keywords are words or short phrases that you assign to a font. These can be anything you need to help organize and find fonts, such as client or project information, or even a "rating." Fonts can have multiple keywords.
- **Licenses:** A License is a description of the font's license agreement. You can use this information to sort and find fonts, and especially to help manage and report on compliance. A font can have multiple licenses. By default, no licenses are assigned. (You can create, edit, and delete Licenses in the User Management application.)
- **Styles:** Styles are descriptions of typographic embellishments applied to a font, such as bold or italic. Universal Type Server applies styles to fonts as you add them, usually based on clues in the font name. Sometimes you may disagree with a style assignment, so you can change them. Fonts can have multiple styles applied, and you can create your own to suit your needs.

Working with Attributes

- **To show the Attributes,** click the Attributes tab at the top of the Details Panel.
- **To view a specific set of attributes,** choose it from the pop-up menu at the top of the Attributes tab.
- **To assign or unassign a specific attribute,** select one or more fonts, then check or uncheck the box for the desired attribute.
- **To add a custom attribute,** click the  button at the bottom of the Attributes tab, then enter a name for the attribute.
- **To remove an attribute,** select it in the list and click the  button at the bottom of the Attributes tab. You cannot remove built-in attributes.
- **To edit an attribute name,** double-click its entry in the list. You cannot edit built-in attributes.
NOTE: You must have specific permissions to create, remove, reset, and edit attributes. You cannot change or remove built-in attributes, only those that you create.
- **To restore a font's original attributes,** select the font, then click the  button at the bottom of the Attributes tab.

Using Attributes to Find Fonts and Create Smart Sets

The Find panel of Universal Type Client lets you find fonts based on multiple criteria, including font attributes.

For details on using the Find panel, see **Specifying Find Criteria** on page 40.

NOTE: Find operations work on the currently-selected workgroup or set; if the results are not what you expected, make sure you have selected the correct starting point.

Example: Finding all unlicensed fonts

1. Select a workgroup or set to search within.
2. Press Command-F (Mac) or Ctrl-F (Windows) to open the Find panel.
3. In the second row of the Find panel, choose **License** from the first drop-down menu.
4. Choose **no licenses assigned** from the second drop-down menu.

The Font list is updated to show fonts that have no licenses assigned.

If you save these Find criteria as a Smart Set, you will have one-click access to a current listing of your unlicensed fonts.

To save Find criteria as a Smart Set:

1. Click the **Save** button  at the top right of the Find panel.
The Smart Set will be added to whatever workgroup or set you selected originally.
2. Type a name for the Smart Set that reflects the nature of the Find criteria.

At any time, you can edit the Smart Set's Find criteria, and move or copy it to another set or workgroup.

For more information on Smart Sets, see **Working with Smart Sets** on page 51.

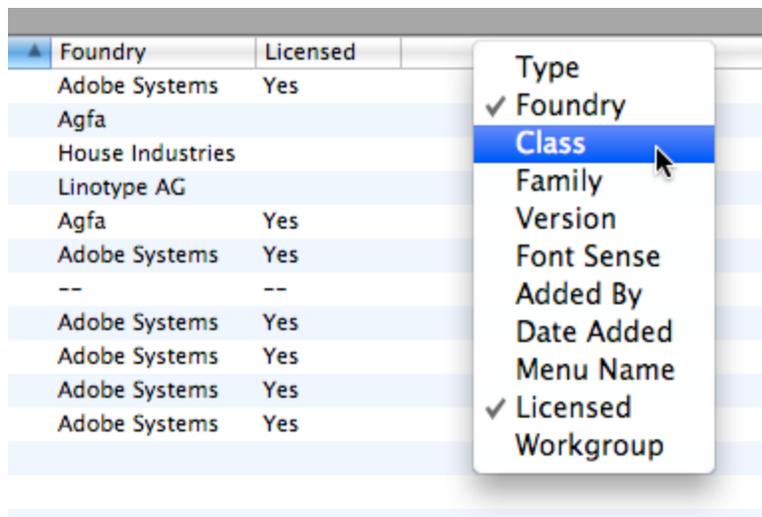
Using Attributes to Sort Fonts

You can sort the **Font** list by clicking on a column head to sort by that criterion. Click a second time to reverse the sort direction.

You can include columns for the attributes Classification and Foundry in the **Font** list.

To add a column to the Font list:

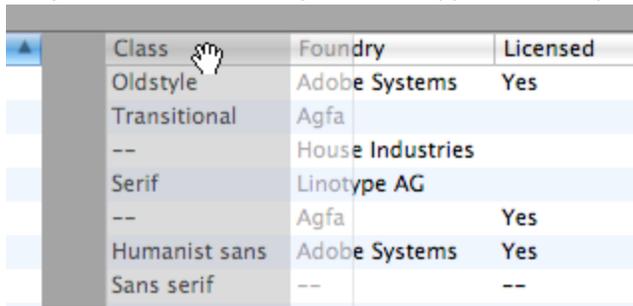
1. Right-click anywhere in the **Font** list column header.
2. Choose the column to add from the shortcut menu.



Items in the shortcut menu that have a checkmark are already displayed in the Fonts list; you can remove a column by selecting the corresponding checked item.

To move a column in the Fonts list:

1. Click and hold the column head.
2. Drag the column left or right until it appears where you want it.



Class	Foundry	Licensed
Oldstyle	Adobe Systems	Yes
Transitional	Agfa	
--	House Industries	
Serif	Linotype AG	
--	Agfa	Yes
Humanist sans	Adobe Systems	Yes
Sans serif	--	--

3. Release the mouse button.

To sort by Classification:

1. Select a workgroup or set to work in.
2. Right-click in the column header of the **Font** list and choose **Class** from the shortcut menu. If the **Class** entry in the menu has a checkmark, then just click outside the menu to cancel the operation.
3. Locate the **Class** column in the **Font** list. Click and hold in the **Class** column header, drag the column left or right to where you want it to be displayed, and release the mouse button.
4. Click on the **Class** column head to sort the font list by Classification. Click again to sort in the opposite direction.

NOTE: A double hyphen (--) entry for Classification means “unknown” or “unspecified.”

Applying and Removing Font Attributes

In order to change specific font attributes, you need to have permission granted by a Workgroup Administrator or the Server Administrator.

Changes you make are applied to the font only within the context of Universal Type Server; the physical font files are not modified.

Changes are displayed for all users in all sets and workgroups. Since attributes can be used as search and Smart Set criteria, make sure the changes you make are appropriate for all users and workgroups.

To change attributes applied to fonts:

1. If necessary, click the **Attributes** button  to display the Attributes pane.
2. Select the attribute category you want to change from the drop-down menu at the top of the Attributes pane.
3. Select a workgroup or set to work in.
4. Select one or more fonts or families in the Fonts list.
 - To select multiple entries, hold down the Command key (Mac) or Ctrl key (Windows) and click the individual items.
 - To view the Fonts list by family, choose **View > Group Fonts by Family**.
5. Check the box next to an attribute to apply it to the selected fonts, or clear the checkbox to remove the attribute from the selected fonts.

NOTE: You can't remove Classifications or Foundries from a font. You can either change the attribute or assign the double hyphen (--) at the top of the list of attributes) to indicate “unassigned.”

TIP: To apply an attribute, such as Foundry or License, to multiple fonts as soon as you import them, import them as a set, select all the fonts in the set, apply the attribute (or attributes), then delete the set. Fonts imported as a set

remain in the workgroup the set is imported into. See **Creating Sets while Adding Fonts** on page 49 for more information.

Reverting to Default Attributes

If you have permission to apply a particular attribute to a font, you can also revert fonts to the default for that attribute. Since attributes can be used as Find and Smart Set criteria, make sure reverting to the default value is appropriate for all users and workgroups.

NOTE: You can't restore the defaults for Licenses and Keywords.

To revert an attribute to its default:

1. If necessary, click the **Attributes** button  to display the Attributes pane.
2. Select the attribute category you want to change from the drop-down menu at the top of the Attributes pane.
3. Select a workgroup or set to work in.
4. Select one or more fonts or families in the Fonts list.
 - To select multiple entries, hold down the Command key (Mac) or Ctrl key (Windows) and click the individual items.
 - To view the Fonts list by family, choose **View > Group Fonts by Family**.
5. Click the **Restore** button .

Creating, Editing, and Deleting Custom Attributes

If you have permission to apply a particular attribute to a font, you can also create, edit, and delete custom values for that attribute. (You cannot change or delete the built-in attributes.)

NOTE: You create, edit, and delete Font Licenses from within the User Management application.

To create a custom attribute:

1. If necessary, click the **Attributes** button  to display the Attributes pane.
2. Select the attribute category you want to change from the drop-down menu at the top of the **Attributes** pane.
3. Click the **Add** button .
4. Type a name for the new attribute value (for Keywords, type the new keyword or phrase).

The new entry will appear in the Attributes pane in alphabetical order. It can be applied to any font in any workgroup.

To edit a custom attribute:

1. If necessary, click the **Attributes** button  to display the **Attributes** pane.
2. Select the attribute category you want to change from the drop-down menu at the top of the **Attributes** pane.
3. Double-click the attribute value you want to change.
4. Type the modified attribute value (for **Keywords**, type the keyword or phrase).

The entry's position in the **Attributes** pane may change; it will appear alphabetically in the list.

NOTE: If the attribute value you change has been previously applied to a font, the font will now have the new value applied instead.

To delete a custom attribute:

1. If necessary, click the **Attributes** button  to display the **Attributes** pane.
2. Select the attribute category you want to change from the drop-down menu at the top of the **Attributes** pane.
3. Click the attribute value you want to delete.
To select multiple values, hold down the **COMMAND** key (Mac) or **CTRL** key (Windows) and click the individual items.
4. Click the **Delete** button .

NOTE

If you delete an attribute that has been assigned to a font, it will be removed from that font. If the value was a Classification, Foundry, or Style, the default value will then be applied to each font.

Developing a Keyword Strategy

To use keywords effectively, you need to first determine the best way to use them in your environment. An ad agency, for example, might use client names and job numbers. A magazine publisher might use issue numbers or article names, and a book publisher might use ISBN numbers. Depending on the environment, you might use a combination of strategies. Keep in mind that the Universal Type Client already lets you sort and search on criteria such as type, foundry, and class, so there is no need to use that type of information in keywords.

Other issues with using keywords include:

- Who is responsible for applying keywords? (These users must have permission to apply keywords.)
- When are keywords applied? When fonts are added to a workgroup? Or when you start using them for a project?
- Who will create and maintain the list of keywords? (These users must have permission to create and delete keywords.)
- What are your naming conventions for keywords? Include standards for capitalizing and abbreviating keywords.
- Who is responsible for removing keywords from fonts and when will they do it?

If multiple users have permission to apply/remove keywords and create/delete keywords, you may wish to meet before you start using keywords. Deciding how keywords best suit your needs, what type of keywords to use, and who is responsible for maintaining them, will prevent confusion and ease your workflow.

Take a look at keywords in a book-publishing environment:

- The book publisher has four workgroups: Text Books, Computer Books, Training Manuals, and Reprints.
- Within each workgroup, there is a shared set for each different template. Depending on the needs of each book, the designer may use additional fonts.
- Once a book's designer determines all the fonts used in a book, they create a keyword indicating the book's ISBN number and apply it to the fonts.
- Since the ISBN number is exclusive to each book, anyone working on the book can locate the correct fonts through the keyword, even if sets are not maintained for each book.
- Once a book is printed, the production person can locate all its fonts and move them to the Reprints workgroup.

In this scenario, many of the fonts will have multiple keywords, which is fine.

Contacting Extensis

Extensis

1800 SW First Avenue, Suite 500
Portland, OR 97201

Phone: (503) 274-2020 (not for support)

Fax: (503) 274-0530

Web: <https://www.extensis.com>

Extensis Europe

Suite 18, Newton House
Kings Park Road, Moulton Park
Northampton NN3 6LG, United Kingdom

Phone: +44 (0)1604 654 270

Fax: +44 (0)1604 654 268

Customer Service

Web: <https://www.extensis.com/contact/>

Support Request: <https://help.extensis.com/hc/en-us/requests/new>

Sales

Phone: (503) 274-4492 (North America)

Email: NA_sales@extensis.com (North America)

Web: <https://www.extensis.com/contact-us-form/> (all regions)

We also work with distributors around the world; **find one near you.**

Celartem, Inc.

Phone: +81 3 5574 7236

Email: sales_ap@celartem.com

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

Technical Support

Technical support for current products is available through the **Extensis website** (<https://www.extensis.com/support/>).

Extensis also maintains a searchable **Knowledge Base** of in-depth articles on various technical topics. (<https://help.extensis.com/hc/en-us/>)

Creating a tech support case

If you are experiencing a problem with a current product, you can submit a tech support case using this **Support Request** (<https://help.extensis.com/hc/en-us/requests/new>).

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 contact information.

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 **Support Policy** (<https://www.extensis.com/support/support-policy/>).

For details on currently supported products, see:

- **Portfolio Support Guide** (<https://www.extensis.com/support/portfolio-support-guide/>)
- **Universal Type Server Support Guide** (<https://www.extensis.com/support/universal-type-server-support-guide/>)
- **Universal Type Client Support Guide** (<https://www.extensis.com/support/universal-type-client-support-guide/>)
- **Suitcase Fusion Support Guide** (<https://www.extensis.com/support/suitcase-fusion-support-guide/>)

Index

A

- ABC123 preview 44
- Activate Fonts Across Workgroups 23
- activating fonts 16-17, 26
 - automatically 23, 26
 - in embedded objects 26
- activation 29
- activation conflicts 19
- activation status 16, 45
- adding a custom attribute 53
- adding fonts 31-32, 49
- administrator
 - font 12
 - full 33-35, 42
- Adobe Illustrator 16, 21, 26, 35, 49
- Adobe InDesign 16, 21, 26, 35, 49
- Adobe Photoshop 16, 21
- Adobe Typekit 19, 28
- All font replication mode 12
- arranging columns 38
- attributes 53
 - keywords 57
 - viewing 42
- Attributes tab 8
- auto-activating fonts 20, 22
- auto-activation preference 24-26

B

- background application 11, 29
- bitmap
 - orphan 31, 33
- blacklist 16, 33
- Bonjour name
 - connecting to Universal Type Server using 9

C

- cache 11-12, 16
 - cleaning 14
- capitalizing keywords 57
- changing your password 10

- character map 46
- character palette 46
- check document fonts 26
- choosing a set of attributes 53
- classification 53
- classifications 12
 - custom 56
 - finding by 53
 - reverting to the default 56
 - sorting fonts by 54
- cleaning font caches 14
- close fonts when 26
- close opened fonts 26
- collecting fonts 35, 37
- collecting for output 31, 35-36
- columns 38
- compliance 29, 42, 53
- conflicts
 - activation 19
- connecting 9
 - automatically 10
- copying fonts to another workgroup 33
- core 10-11, 29
- corrupt fonts 31-33
- create document set 49
- custom attributes 53
- custom classifications 56
- custom styles 56

D

- daily workflow 7
- deactivating fonts 16, 19, 26
- deleting
 - fonts 31, 34-35
 - sets 51
- Details Panel 8
- disabling other font managers 8
- disconnecting 11
- dragging and dropping
 - to collect fonts 32, 37

duplicate fonts 34, 49

E

editing custom attributes 53

embedded objects

 activating fonts in 26

enforcement 29

EPS files 25-26

exporting fonts 31, 35-36

F

families 26, 38-39

 regrouping 39

 renaming 39

 restoring default groups 39

favorites 43

Favorites Smart Set 43

finding 38, 40, 53

 smart sets 41

 unlicensed fonts 53

floating preview 45

FMCore 29

font administrator 12

font attributes 53

Font Book preferences 8

font cache 11-12, 16

font compliance 29

font manager 7

 disabling 8

font menus 16

font problems 33

font replication 12

Font Sense 20, 22-26

Fonts pane 38

forget connection 11

foundry 53

full administrator 33-35, 42

G

Glyph View 46

graphics

 fonts in 25-26

grouping fonts by family 26, 38

I

Illustrator 16, 21, 26, 35, 49

InDesign 16, 21, 26, 35, 49

Info tab 8

K

keyword 53

keywords

 strategy 57

L

license 53

license compliance 29

licenses

 applying and removing 55

 finding by 53

 viewing 53

Local Cache font replication mode 12

M

metadata

 Font Sense 20, 22-26

missing fonts 25-26

N

nesting sets 50

O

offline mode 11

On Demand font replication mode 12

On Demand Local Cache font replication mode 12

OpenType 25

operating system required fonts 13

original attributes, restoring 53

orphan font 31, 33

P

paragraph preview 44

parent set 50

password 10

permanently active sets 52

- permissions 12
- personal workgroup 11, 14
- Photoshop 16, 21
- plug-ins 20, 23-24, 26
 - choosing a workgroup 23
 - close opened fonts 26
 - collecting for output 35
 - creating sets 49
 - disabling 21
 - enabling 21
 - enabling and disabling 26
 - installing 21
 - pick best match 25-26
 - use Font Sense 26
- port for connection 9
- PostScript 25
- preferences
 - auto-activation 24, 26
 - Font Book 8
- preview 44
 - ABC123 44
 - floating 45
 - glyph view 46
 - paragraph 44
 - printing 47
 - QuickType 44
 - size 45
 - text 44
 - type 44
 - waterfall 44
- preview, QuickComp 47
- printing 47

Q

- QuarkXPress 16, 21, 26, 35, 49
- QuickComp 47
- QuickFind 40
- QuickMatch 42
- QuickType preview 44

R

- regrouping font families 39
- removing
 - fonts 34-35
 - sets 51

- removing attributes 53
- renaming font families 39
- replication 12
- restoring
 - default attributes 56
 - user disabled warnings 15
- restoring original attributes 53

S

- search 40, 53
- service bureau
 - collecting fonts for 35
- sets 48
 - adding fonts 48
 - create from selection 48
 - creating 32, 48-49
 - deleting 51
 - duplicate 49
 - moving and copying fonts 51
 - nesting 50
 - permanently active 52
 - renaming 51
 - sharing 50
 - smart 41, 51
 - startup 52
 - unshare 50
- sharing
 - fonts 33
 - sets 50
- showing attributes 53
- Smart Set
 - making a favorites Smart Set 43
- smart sets 41, 51
- sorting 38
- special characters 46
- startup application 29
- startup sets 52
- status
 - activation 16
- strategy
 - keywording 57
- style 53
- styles
 - applying 55
 - custom 56

- finding by 53
 - reverting to the default 56
- synchronizing 12
- system fonts 13

T

- TrueType 25
- type core 10, 29
- Typekit 19, 28

U

- unassigning an attribute 53
- unavailable fonts 25
- Unicode 46
- Universal Type Core 10, 29
- unlicensed fonts
 - finding 53
- unsharing sets 50

W

- waterfall preview 44
- workflow 7
- workgroups 17
 - personal 14
 - plug-ins 23
- working remotely 11

X

- XTension 21, See also plug-ins