



Simplify Scanning
Client User Guide
Version 6.6

Release Info

This version of the *Simplify Scanning Client User Guide* is applicable for all software versions of Simplify Scanning 6.6 and greater, and is current until replaced.

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Customer Support

Customer support is available to organizations that purchase Simplify Scanning and that have an annual support agreement. Contact Tricerat at:

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Preface

Welcome to the *Simplify Scanning Client User Guide*. The purpose of the *Simplify Scanning Client User Guide* is to answer your questions and guide you through the procedures necessary to use the Simplify Scanning client efficiently and effectively.

Using the manual

You will find the *Simplify Scanning Client User Guide* easy to use. You can simply look up the topic that you need in the Table of Contents. Later, in this Preface, you will find a brief discussion of each chapter to further assist you in locating the information that you need.

Special information about the manual

The *Simplify Scanning Client User Guide* has a dual purpose design. It can be distributed electronically and then printed on an as-needed basis, or it can be viewed online in its fully interactive capacity. If you view the document online, a standard set of bookmarks appears in a frame on the left side of the document window for navigation through the document.

Conventions used in the manual

The *Simplify Scanning Client User Guide* uses the following conventions:

- Information that can vary in a command—variable information—is indicated by alphanumeric characters enclosed in angle brackets; for example, <Server>. Do not type the angle brackets when you specify the variable information.
- A new term, or term that must be emphasized for clarity of procedures, is *italicized*.
- Page numbering is “online friendly.” Pages are numbered from 1 to x, *starting with the cover*, and ending on the last page of the guide.



Although numbering begins on the cover page, this number is not visible on the cover page or front matter pages. Page numbers are visible beginning with the first page of the Table of Contents.

- This manual is intended for both print and online viewing.
 - If information appears in [blue](#), it is a hyperlink. Table of Contents entries are also hyperlinks. Click the hyperlink to advance to the referenced information.

Assumptions for the manual

The *Simplify Scanning Client User Guide* assumes that:

- You are familiar with Windows-based applications and basic Windows functions and navigational elements.
- References to any third-party standards or third-party software functions were current as of the release of this version of Simplify Scanning, and might have already changed.

Organization of the manual

In addition to this Preface, the *Simplify Scanning Client User Guide* contains the following chapters:

- [Chapter 1, “The Simplify Scanning Client,” on page 6](#) details the functions that are available in the Simplify Scanning Client Control panel.
- [Chapter 2, “Using Simplify Scanning,” on page 17](#) guides you through the procedures for using Simplify Scanning.

Chapter 1

The Simplify Scanning Client

The Simplify Scanning client does not require you to configure your scanners for a remote session. As long as the Simplify Scanning client is installed on your connecting workstation and the Simplify Scanning Server is installed on the remote server or desktop, then your scanners are built. You access the Simplify Scanning client through a control panel that allows for the defining and configuring of the client scanners that are to be made available to the remote server. The client supports both major scanning protocols, TWAIN and WIA, as well as a proprietary protocol, RPOS, that Tricerat has developed. This chapter details the functions that are available in the Simplify Scanning Client Control panel.

This chapter covers the following topics:

- [“The Simplify Scanning Client Control Panel” on page 7.](#)
- [“The Simplify Scanning Client Control Panel, About Tab” on page 9.](#)
- [“The Simplify Scanning Client Control Panel, General Tab” on page 10.](#)
- [“The Simplify Scanning Client Control Panel, Scanners Tab” on page 12.](#)
- [“The Simplify Scanning Client Control Panel, Camera Tab” on page 14.](#)
- [“The Simplify Scanning Client Control Panel, Plugins Tab” on page 15.](#)
- [“The Simplify Scanning Client Control Panel, Logging Tab” on page 16.](#)

The Simplify Scanning Client Control Panel

The Simplify Scanning client is installed on every client workstation that your users are using to log in to the remote server or desktop. The Simplify Scanning Client Control Panel allows for the defining and configuring of the client scanners that are to be made available to the remote server. To open the Simplify Scanning Client Control Panel, do one of the following:

- Open the Start menu, and then under Tricerat > Simplify Scanning, double-click Client Control Panel.
- If available on the client desktop, double-click the Simplify Scanning Client desktop icon.

Figure 1-1: Simplify Scanning Client desktop icon

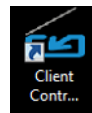


Figure 1-2: Simplify Scanning Client Control Panel



The Simplify Scanning Client Control Panel has six primary tabs, each with different options for defining and configuring the client scanners that are to be made available to the remote server. With the exception of the About tab and the Plugins tab, all the tabs have the following features in common:

- After you make a change to any value on a tab, you can do one of the following:
 - Click Apply (displayed at the bottom of the control panel) to save the change and leave the control panel open.
 - Click OK (displayed at the bottom of the control panel) to save the change and close the control panel.



All current values on all tabs are saved when you click Apply or OK. You cannot save changes on a per tab basis.

- After you have made and applied all the needed changes for your Simplify Scanning client, click the standard Windows close icon (“X”) at the top right corner of the control panel to close and exit out of the control panel.



If you have made any changes to the client settings, and have not applied these changes, then you are prompted to do so before exiting the application.

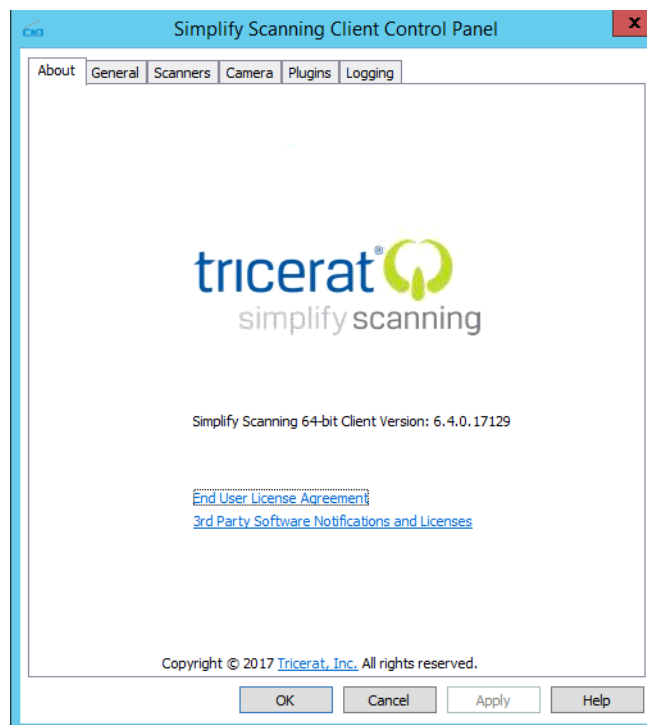
See:

- [“The Simplify Scanning Client Control Panel, About Tab” on page 9.](#)
- [“The Simplify Scanning Client Control Panel, General Tab” on page 10.](#)
- [“The Simplify Scanning Client Control Panel, Scanners Tab” on page 12.](#)
- [“The Simplify Scanning Client Control Panel, Camera Tab” on page 14.](#)
- [“The Simplify Scanning Client Control Panel, Plugins Tab” on page 15.](#)
- [“The Simplify Scanning Client Control Panel, Logging Tab” on page 16.](#)

The Simplify Scanning Client Control Panel, About Tab

When the Simplify Scanning Client Control Panel first opens, the About tab is the open tab. The About tab displays the major version of the currently installed client and two unique hyperlinks, one for the End User License Agreement (EULA) for the Simplify Scanning client and one for notifications and licenses for the third-party software that the Simplify Scanning client uses. Optionally, you can click these links to view the referenced information.

Figure 1-3: Simplify Scanning Client Control Panel, About tab



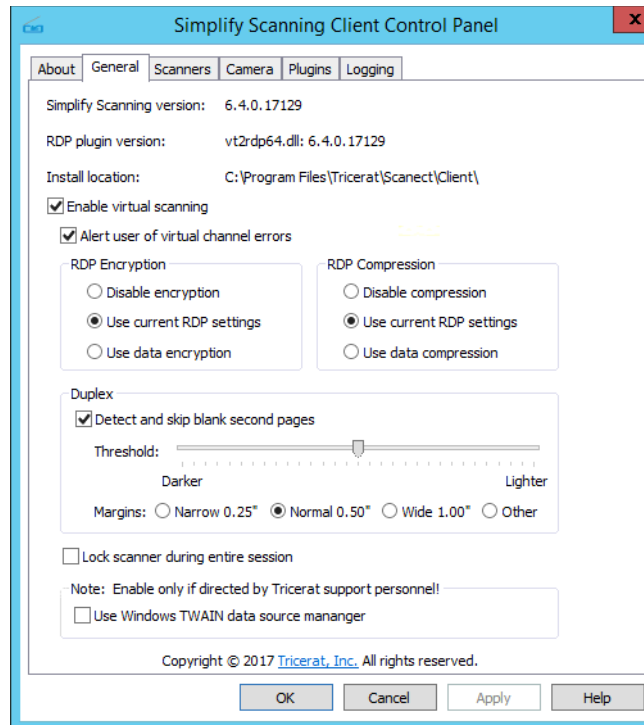
The Simplify Scanning Client Control Panel, General Tab

The General tab on the Simplify Scanning Client Control Panel displays version information about the Simplify Scanning software. It also contains options for configuring your remote session and options for troubleshooting your client installation.



Contact your Simplify Scanning system administrator for assistance with these settings.

Figure 1-4: Simplify Scanning Client Control Panel, General tab



Option	Description
Simplify Scanning version	The major version for the Simplify Scanning client software.
RDP plugin version	The version for the RDP plugin DLL that the Simplify Scanning Client software uses.
Install location	The detected installation location for the Simplify Scanning client.
Enable virtual scanning.	Selected by default. Leave this option selected to keep the Simplify Scanning client software operable. Clear this option to disable the Simplify Scanning client software.
Alert user of virtual channel errors	Selected by default. Leave this option selected to display a notification to the user anytime an error in communication between the Simplify Scanning Server and client occurs.

Option	Description
<p>RDP Encryption - Only one option can be selected at a time.</p> <ul style="list-style-type: none"> • Disable encryption • Forces the disabling of RDP encryption. • Use current RDP settings • Selected by default. Use the RDP encryption settings as specified by the system administrator. • Use data encryption • Forces the enabling of RDP encryption. 	
<p>RDP Compression - Only one option can be selected at a time.</p> <ul style="list-style-type: none"> • Disable compression • Forces the disabling of RDP compression.. • Use current RDP settings • Selected by default. Use the RDP compression settings as specified by the system administrator. • Use data compression • Forces the enabling of RDP compression. 	
<p>Duplex</p>	
<p>Detect and skip blank second page</p>	<p>Selected by default. During a duplex scan, use the current threshold setting to detect blank second pages. Blank second pages are not sent to the server.</p>
<p>Threshold</p>	<p>Adjust the Threshold setting to set the percentage of white or black pixels that determine if a page is blank or not.</p>
<p>Margins</p>	<p>Specify the margin size for the paper. You can select from a pre-defined list (Narrow, Normal, or Wide), and any data that falls outside the specified margins is not evaluated. Note: To set a margin other than a pre-defined value (Other), contact support@Tricerat.com.</p>
<p>Lock scanner during entire session</p>	<p>Typically, a scanner driver is locked before a scan and unlocked after a scan. Select this option to keep the scanner driver locked for the entire user session. Note: This option is useful for some network scanner drivers.</p>
<p>Use TWAIN Data Source Manager (DSM)</p>	<p>Enable only if Tricerat support directs you to do so.</p>

The Simplify Scanning Client Control Panel, Scanners Tab

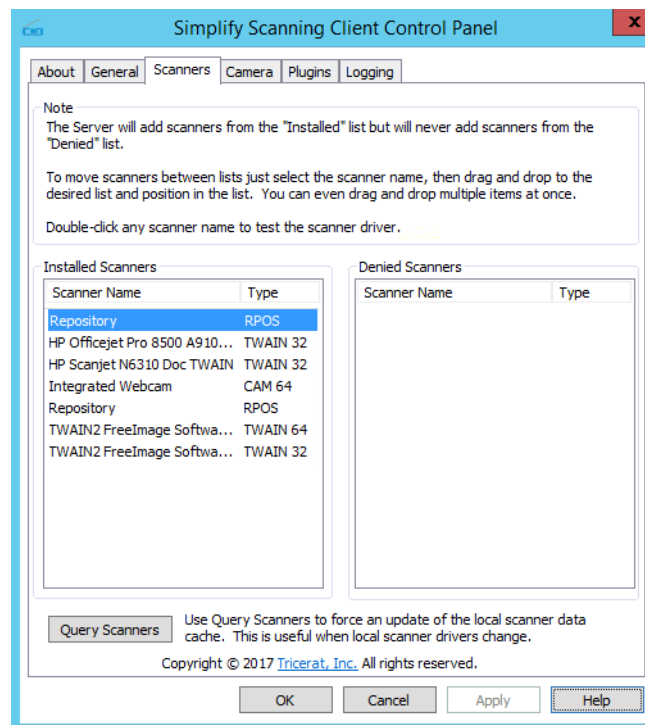
The Installed Scanners list on the Scanners tab on the Simplify Scanning Client Control Panel displays all the scanner drivers, by name, that were detected on your client or client's network. The Type column for each scanner indicates the protocol, TWAIN, WIA, or CAM that the scanner uses as well as the bit size (32 or 62) of the scanner driver. RPOS, which stands for Repository, is always displayed in the Installed Scanners list, and it is a proprietary protocol developed by Tricerat. If this protocol is selected, then you can "scan" an image that is currently stored elsewhere; for example, on an external and connected USB drive, the C: drive of the client, or a digital camera's storage location when the digital camera is connected to the Simplify Scanning client by USB and using a file browser to select the image and digitally transfer it.



Currently, the RPOS protocol supports only bitmap (.bmp) images.

The Simplify Scanning Server queries the available scanners in the Installed Scanners list for a scanning job in the order in which they are displayed in the list. The server never queries any scanner that is displayed in the Denied Scanners list.

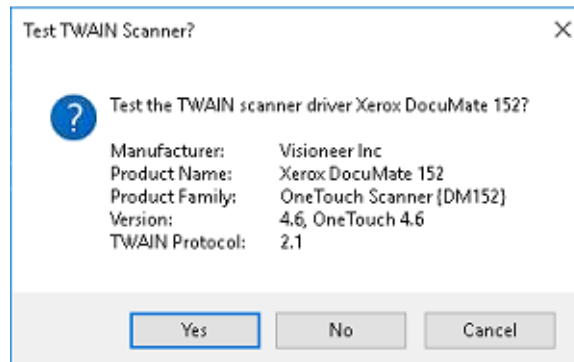
Figure 1-5: Simplify Scanning Client Control Panel, Scanners tab



You can do the following to arrange the scanners in these lists:

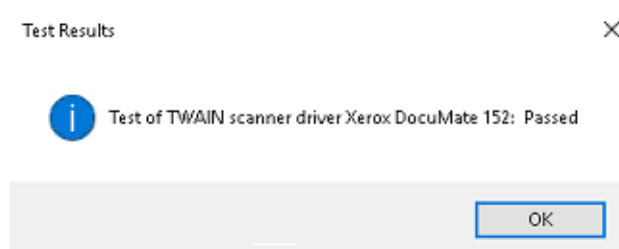
- To move a scanner from the Installed Scanners list to the Denied Scanners list, in the Installed Scanners list, select the scanner (press and hold the CTRL key to select multiple scanners), and then drag the selected scanners to the Denied Scanners list. (You can always move a scanner or scanners from the Denied Scanners list back to the Installed Scanners list.)
- To change the order of scanners that are displayed in the Installed Scanners list, select the scanner, and then drag the scanner to a new location in the list.
- To view information about a scanner, double-click the scanner to open a Test Scanner dialog box. The dialog box displays name of the scanner's manufacturer, the scanner's product name and product family, its current version, and the scanning protocol that it uses. The dialog box also prompts you about testing the scanner.

Figure 1-6: Test Scanner dialog box



- To test a scanner before opening a scanner session, double-click the scanner to open a Test Scanner dialog box (see Figure 1-6 above), and then click Yes. The results of the test are displayed in a Test Results dialog box.

Figure 1-7: Test Results dialog box

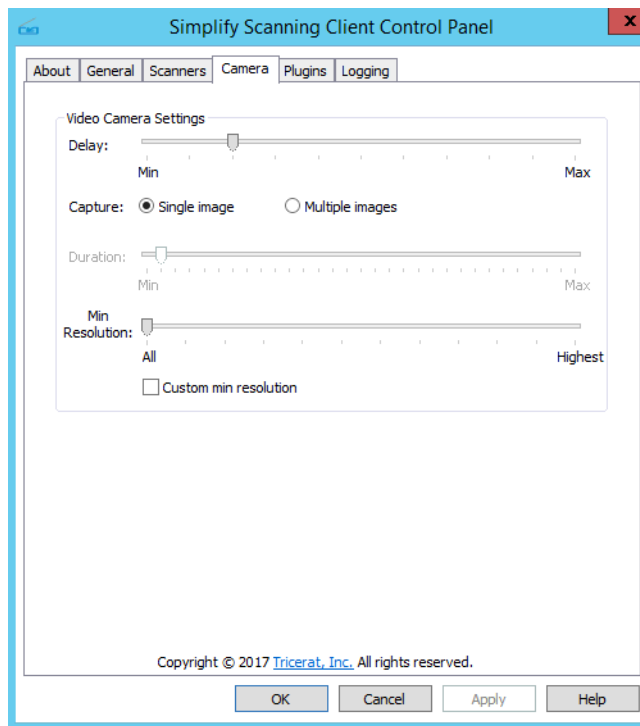


- To update the information about the scanners that are installed on your client, click Query Scanners. Note that after you query your installed scanners, the order of the scanners that are displayed in the Installed Scanners list might change. Also, if any scanner driver fails this simple query, then after query is complete, the scanner is automatically moved from the Installed Scanners list to the Denied Scanners list.

The Simplify Scanning Client Control Panel, Camera Tab

In addition to traditional scanners, Simplify Scanning client supports digital camera output. For example, the camera can be connected via USB to a client on which the Simplify Scanning client is installed, or the camera can be an integrated camera as is common on many laptops. The Camera tab on the Simplify Scanning Client Control panel contains the options for configuring the settings for a digital camera that is to be used with the Simplify Scanning client.

Figure 1-8: Simplify Scanning Client Control Panel, Camera tab

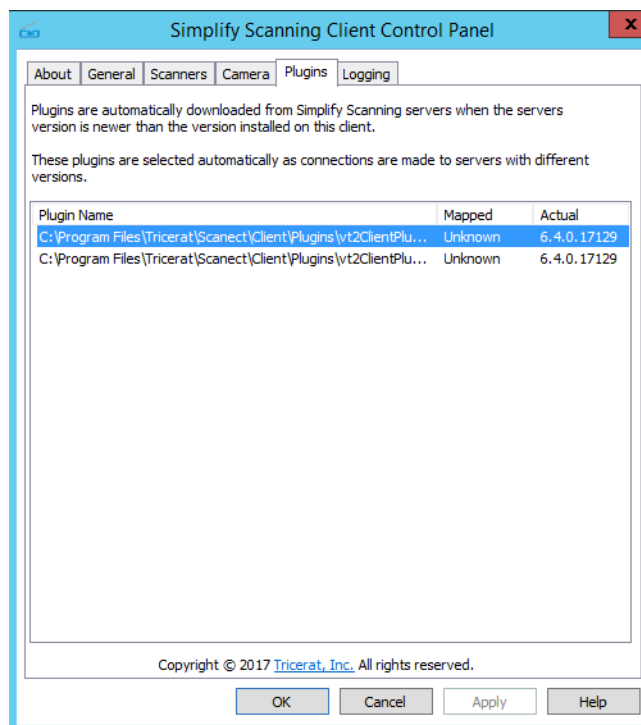


Option	Description
Delay	The time to delay before capturing a picture with the camera.
Capture	You can select only one option. <ul style="list-style-type: none"> • Single image • Multiple images
Duration	Enabled only for multiple images. The duration for capturing multiple images, which are collated from a video.
Min Resolution	The minimum resolution required for pictures.
Custom min resolution	Contact support@Tricerat for assistance with this setting.

The Simplify Scanning Client Control Panel, Plugins Tab

Simplify Scanning has an auto-update function that ensures that the software versions that are running on the Simplify Scanning Server and a Simplify Scanning client are always in sync. With the auto-update function enabled, if the Simplify Scanning Server detects that any client that connects to it is running a version of the software that is older than what it is currently running, the server automatically downloads the plugins that are necessary to upgrade the client and synchronize the versions between the server and the client. The Plugins tab on the Simplify Scanning Client Control Panel is a read-only tab that displays the plugins that have been automatically downloaded from the Simplify Scanning Server to the Simplify Scanning client for the purpose of upgrading the client and therefore, keeping the versions on the server and the client in sync.

Figure 1-9: Simplify Scanning Client Control Panel, Plugins tab



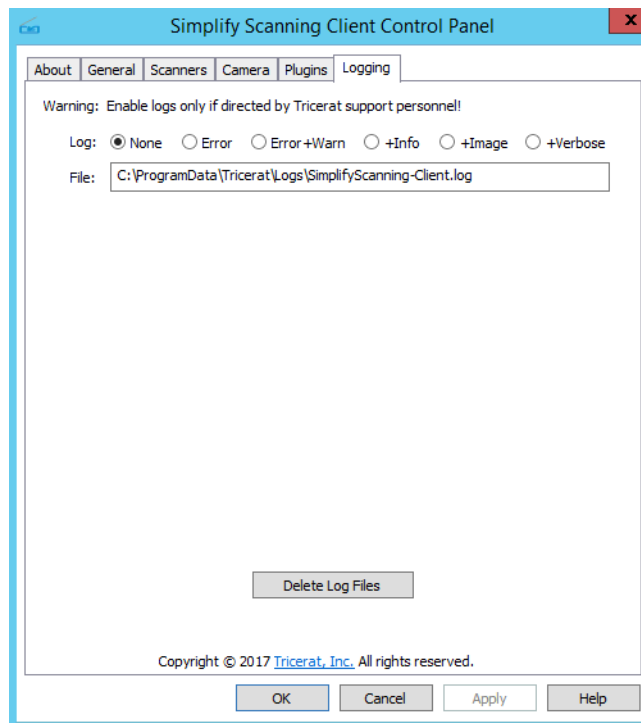
The Simplify Scanning Client Control Panel, Logging Tab

The Logging tab on the Simplify Scanning Client Control Panel provides options for diagnostic logging from a Simplify Scanning client workstation. This logging information is used for debugging or problem tracking purposes.



Because Tricerat support primarily uses this information, you should not change any of the default values on this tab unless Tricerat Support instructs you to do so.

Figure 1-10: Simplify Scanning Client Control Panel, Logging tab



Chapter 2

Using Simplify Scanning

Simplify Scanning is a remote desktop scanning management solution that uses a universal “virtual” scanner driver that queries local scanners for their capabilities, such as resolution and supported paper sizes, and then forwards these scanner properties to be virtualized on a remote server or virtual desktop. Simplify Scanning compresses data to decrease network bandwidth consumption and achieve the scanning. By creating a single point with the virtual scanner driver, Simplify Scanning provides you full access to problem-free, remote desktop scanning across your environment. This chapter guides you through the procedures for using Simplify Scanning.

This chapter covers the following topics:

- [“Using Simplify Scanning” on page 18.](#)



For additional information about configuring and administering Simplify Scanning, visit Tricerat’s support center at <http://tricerat.com/support-center/technical-documentation> and download the Simplify Scanning Administrator Guide and/or the Simplify Scanning Quick Start Installation Guide.

Using Simplify Scanning

How you interact with the Simplify Scanning client and the steps that you must carry out are dependent on the selected scanning application, referred to as the *calling application*. Therefore, the following is a high-level procedure that provides the fundamentals for how you use Simplify Scanning to carry out a scan job. If you have questions about a specific step, or need assistance with your specific calling application, contact your Simplify Scanning system administrator.

To use Simplify Scanning

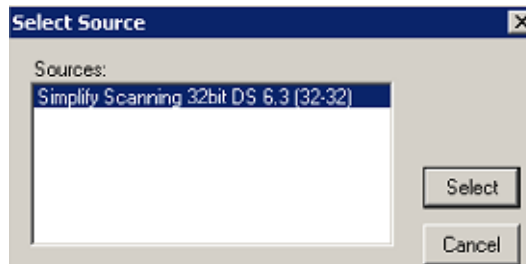
1. On the Simplify Scanning client computer, use a pre-established protocol such as Microsoft RDP to log on to the server where Simplify Scanning is installed.
2. Open the server Start menu and select the appropriate scanning program.

Depending on the selected program, the Simplify Scanning data source might be automatically selected, or you might have to select the Simplify Scanning data source manually.



Remember, Simplify Scanning virtualizes all the scanner drivers that it has detected on your client computer and provides them as a single point of contact, so the Sources list does not list all your individual scanner drivers. Instead, it displays only the Simplify Scanning single point of contact.

Figure 2-1: Select Source dialog box



3. Acquire your image.

The Simplify Scanning dialog box opens. The Scanner pane displays the scanner driver that is listed first in the list of Installed Scanners for your client. Unless you select another scanner, this is the scanner to which your scanning jobs will be sent. See [Figure 2-2 on page 19](#).

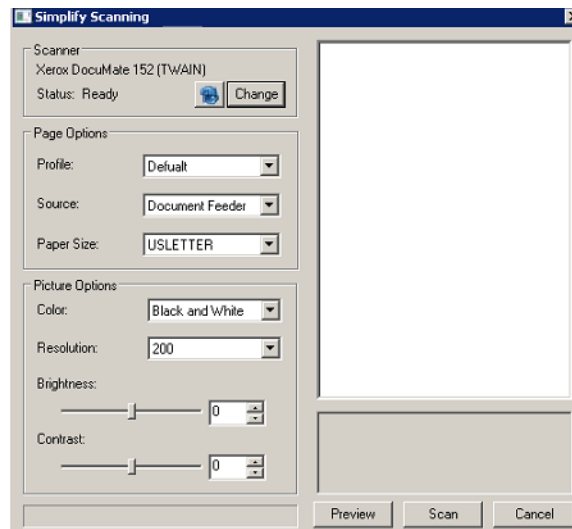


Be patient. It might take a minute or two for the Simplify Scanning dialog box to open.



Remember, you can rearrange the order of the scanners, or you can move scanners between the Installed Scanners list and Denied Scanners list on the Scanners tab of the Simplify Scanning Client Control Panel. See [“The Simplify Scanning Client Control Panel, Scanners Tab”](#) on page 12.

Figure 2-2: Simplify Scanning dialog box



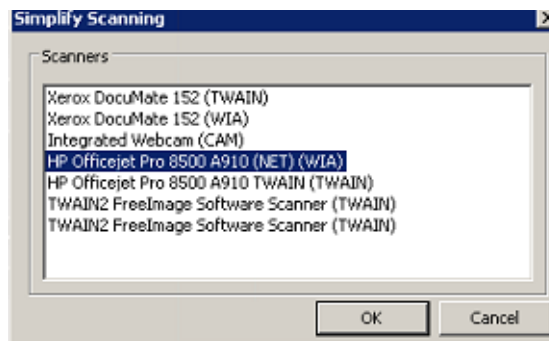
4. Optionally, to select a different scanner, in the Scanner pane, click Change and in the Select Scanner dialog box that opens, select a different scanner, and then click OK.



The icon that is displayed in the Scanner pane is a Refresh icon. To initialize a client scanner, click Refresh. For example, you forgot to turn on a scanner and it is currently listed in an Offline status. After you turn the scanner on, click Refresh to initialize the scanner.

The Select Scanner dialog box closes. The Simplify Scanning dialog box remains open.

Figure 2-3: Select Scanner dialog box



5. Do one of the following:
 - If your Simplify Scanning Administrator has not set up any scanning profiles for your client, then a single profile named Default is displayed in the Profiles list.
 - If your Simplify Scanning Administrator has set up scanning profiles for your client, then all these profiles are displayed, by name, in the Profiles list, and you can select the profile that is appropriate for your scan job.
6. Specify the scan job options. When specifying the job options for a selected profile, note the following:
 - The available values for a scan job option such as Duplex for Source depend upon the capabilities of the selected scanner. Not all values are available for all scan job options.
 - The selected profile determines which scan job options are available for editing and which are set to specific values. For example, your Simplify Scanning system administrator might have set up a Default profile, which makes all the scan job options available for editing and another profile such as Welcome Letter that sets the Source to Duplex and the Paper Size to USLetter, and you cannot change these values.



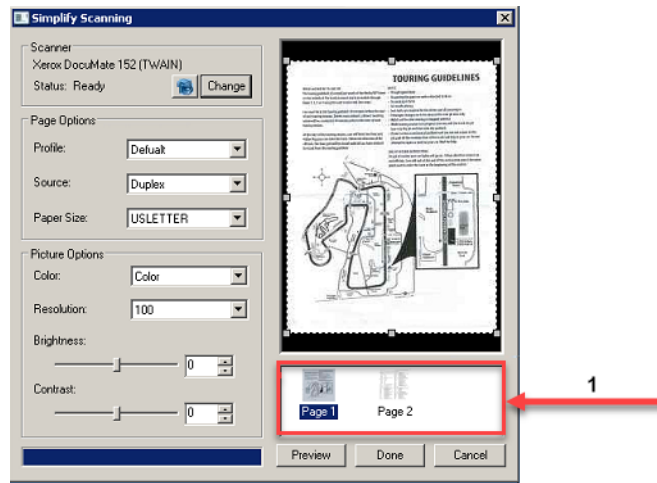
If the correct profile is not available, contact your Simplify Scanning system administrator.

7. To send the scan job immediately to the calling application, click Scan; otherwise, to preview the scan job results and, if necessary, make adjustments before you send the job to the calling application, click Preview.

A preview of the completed scan job is displayed in the Preview (right) pane of the Simplify Scanning dialog box. If the scan job is a multi-page or duplex job, then, by default, the first page of the job is displayed with crop marks in the pane, and (1) thumbnails of the other pages are displayed below the Preview pane. You can click a thumbnail to open a preview of the scanned page in the Preview pane. See [Figure 2-4 on page 21](#).

 - If you are satisfied with the preview of the scan job, click Done to send the scan job to the calling application,
 - If you need to edit the scan job results before sending the scan job to the calling application, continue to [Step 8](#).

Figure 2-4: scan job results displayed in the Preview pane



8. To edit the scan job results, do any or all of the following as appropriate.
 - To resize the image/rest the portion of the page that is to be scanned, in the Preview pane, click and drag the appropriate crop marks.
 - To adjust the brightness or contrast of a page, right-click the image, and on the context menu that opens, click Edit, and then in the left pane of the dialog box, use the slider bars to adjust the brightness and/or contrast, or manually enter the values.
 - To rotate a selected page by a user-specified value, right-click the image, and on the context menu that opens, click Edit, and then in the left pane of the dialog box, in the Rotation Angle field, enter the rotation value. A positive value rotates the page to the right, and a negative value rotates the page to left.
 - To rotate a selected page by a set amount (90° left or right or 180°), right-click the image, and on the context menu that opens, click Edit, and then at the bottom of the Simplify Scanning dialog box, click the appropriate Rotate Page icon.

See [Figure 2-5 on page 22](#).



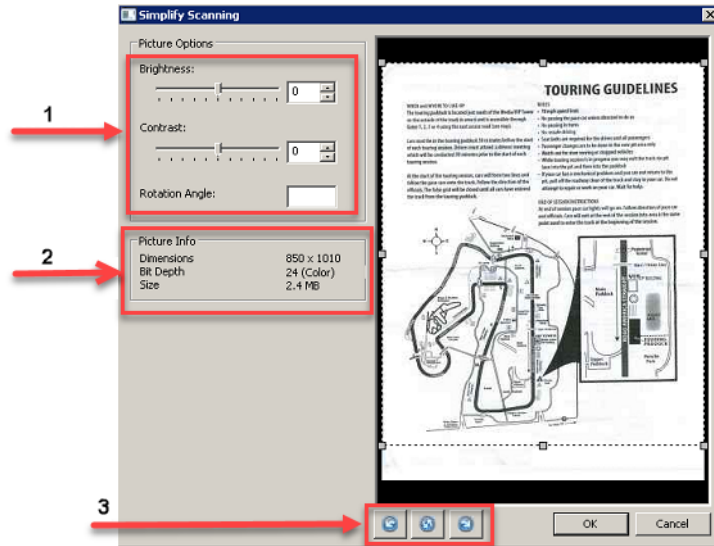
You can also double-click an image thumbnail to enable it for editing.



After you enable an image for editing, information about the image (Dimensions, Bit Depth and Size) is displayed in the left pane of the dialog box.

- To delete a page from a scan, right-click the thumbnail image, and on the context menu that opens, click Delete.

Figure 2-5: Rotate page icons



Option	Description
1	Brightness, contrast, and manual rotation
2	Image information
3	Rotate Page icons

- After you have satisfactorily edited the scan job, click OK to apply the changes, and then click Done to send the edited scan job to the calling application.