



Simplify Suite
Administrator Guide
Version 6.7

Release Info	This version of the <i>Simplify Suite Administrator Guide</i> is applicable for all software versions of Simplify Suite 6.7 and greater, and all software versions of ScrewDrivers 6.7 and greater, and is current until replaced.
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Customer Support	Customer support is available to organizations that purchase Simplify Suite and that have an annual support agreement. Contact Tricerat at:

Tricerat, Inc.
11500 Cronridge Drive
Suite 100
Owing Mills, MD 21117
800-582-5167
410-715-3926
support@tricerat.com
www.tricerat.com

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Preface

Welcome to the *Simplify Suite Administrator Guide*. The purpose of the *Simplify Suite Administrator Guide* is to answer your questions and guide you through the procedures that are available through the Simplify Console for administering and maintaining the Simplify Suite efficiently and effectively.

Using the manual

You will find the *Simplify Suite Administrator 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 Suite Administrator 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 Suite Administrator 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 address>. 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 Suite Administrator 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 Suite, and might have already changed.

Organization of the manual

In addition to this Preface, the *Simplify Suite Administrator Guide* contains the following sections, chapters, and appendices:

- [Section 1, “Simplify Console,” on page 16](#) provides detailed instructions for administering and managing Simplify Suite with Simplify Console. This section contains the following chapters:
 - [Chapter 1, “Getting Started with Simplify Console,” on page 17](#) an overview of Simplify Console as well as the major navigational elements for the console. It also details how to customize the Simplify Console layout and how to modify its default values to better suit your working needs.
 - [Chapter 2, “The Simplify Console Panes,” on page 32](#) details the structure and available functions for the Owners pane, the Assignments pane, and the Objects pane, which are the three primary panes in the Simplify Console window in which you carry out your administration and maintenance tasks.
 - [Chapter 3, “Managing the Simplify Suite with Simplify Console,” on page 43](#) details all the functions that are available in Simplify Console for administering and maintaining the needed owners, objects, and assignments for your Simplify Suite installations.
 - [Chapter 4, “Data Review in the Simplify Console,” on page 65](#) details the two primary functions that are available in Simplify Console for reviewing and analyzing the data in your Simplify database – audits and reports.
 - [Chapter 5, “Simplify Console Tools,” on page 73](#) details the tools that available through Simplify Console for retrieving and manipulating the data that is relevant to the operation of Simplify Suite, and for configuring the console and/or Simplify Suite.
- [Section 2, “Simplify Printing,” on page 77](#) provides detailed instructions for administering and managing Simplify Printing. This section contains the following chapters and appendices:
 - [Chapter 1, “Getting Started with Simplify Printing,” on page 78](#) provides information about logging in to Simplify Console for managing your Simplify Printing instance. It also provides a high-level overview of the ways that different clients can interact with Simplify Printing.
 - [Chapter 2, “Managing Printer Objects in Simplify Printing,” on page 83](#) details how to

add, assign, and configure the necessary print server printers for your users in the Simplify Printing environment.

- [Chapter 3, “Managing ScrewDrivers Objects and Settings,” on page 105](#) details the ScrewDrivers configuration settings that are available for assignment in the Simplify Console.
- [Appendix A, “ScrewDrivers Troubleshooting,” on page 110](#) provides some general considerations when troubleshooting the ScrewDrivers components of Simplify Printing. It also provides information about solving some of the most common problems you might encounter when using ScrewDrivers.
- [Section 3, “Simplify Profiles,” on page 118](#) provides detailed instructions for administering and managing Simplify Profiles. This section contains the following chapters:
 - [Chapter 1, “Getting Started with Simplify Profiles,” on page 119](#) provides information about logging in to Simplify Console for managing your Simplify Profiles instance. It also provides a high-level overview of the ways that different clients can interact with Simplify Printing. It also provides a high-level overview of the interactions between Simplify Profiles and Windows profiles and policies. Finally, it details the relevant considerations for using Simplify Profiles such as running Simplify Profiles in offline mode, logging on to multiple sessions of Simplify Profiles, database connection considerations, and uninstalling Simplify Profiles.
 - [Chapter 2, “Managing Registry and Profile Objects in Simplify Profiles,” on page 126](#) details the management of registry and profile objects, which provide the backbone for Simplify Profiles through registry and file operations.
 - [Chapter 3, “Managing Windows Policy Objects in Simplify Profiles,” on page 160](#) details the management of Windows policy objects in Simplify Profiles.
 - [Chapter 4, “Managing Administrative Template Objects in Simplify Profiles,” on page 180](#) details the creation, configuration, and management of Administrative Template objects for your Simplify Suite environment.
 - [Chapter 5, “Simplify Profiles Tools,” on page 188](#) details the tools that complement Simplify Profiles technology and that can assist you in giving your users a customized computing environment.
- [Section 4, “Simplify Driver Management,” on page 202](#) provides detailed instructions for administering and managing Simplify Driver Management. This section contains the following chapters:
 - [Chapter 1, “Getting Started with Simplify Driver Management,” on page 201](#) provides a high-level overview of the Simplify Driver Management infrastructure. It also details how to access Simplify Driver Management in Simplify Suite, and how to import your users’ print drivers in to the Simplify database in preparation for creating the necessary printer objects for your users.
 - [Chapter 2, “Using Simplify Driver Management,” on page 205](#) details how to open the Simplify Driver Management Import Tool and how to use this tool to import printer drivers in to the Simplify database, import printers in to the Simplify database to create the necessary Printer objects, and then assign drivers to printers. The chapter

also details how to use the functions that are in the Simplify Console to assign these printers to your organization's workstations, users, and/or groups.

Section 1

Simplify Console

Section Contents

- [Getting Started with Simplify Console on page 17](#)
- [The Simplify Console Panes on page 32](#)
- [Managing the Simplify Suite with Simplify Console on page 43](#)
- [Data Review in the Simplify Console on page 65](#)
- [Simplify Console Tools on page 73](#)

Chapter 1

Getting Started with Simplify Console

Tricerat's Simplify Suite is a complete user management tool that incorporates a software framework to extend and enhance Windows server operating systems, which boosts Microsoft RDS performance, Citrix XenApp reliability and security, as well as supporting VMware virtual desktop infrastructure (VDI) and Windows workstations. Simplify Console is the management interface for all the Simplify Suite components. This chapter provides an overview of Simplify Console as well as the major navigational elements for the console. It also details how to customize the Simplify Console layout and how to modify its default values to better suit your working needs.

This chapter covers the following topics:

- [“Simplify Console Overview” on page 18.](#)
- [“The Simplify Console Layout” on page 20.](#)
- [“Customizing the Simplify Console Layout” on page 24.](#)
- [“Specifying Simplify Suite Options” on page 30.](#)

Simplify Console Overview

Simplify Console is the management feature of Simplify Suite. You manage the entire Simplify Suite application through Simplify Console. By default, Simplify Console is installed on the same Windows clients on which you are installing Simplify Suite. If you do not install Simplify Console for at least one instance of Simplify Suite, then you are not able to manage or configure any of your Simplify Suite components. Because Simplify Console is unlicensed, you can also install it as a standalone application to as many workstations as needed. (Many Simplify Suite administrators install Simplify Console on their workstations to provide a way to assign objects and change settings remotely.)



For detailed instructions about installing Simplify Console as a standalone application, see the *Simplify Suite Installation Guide*.

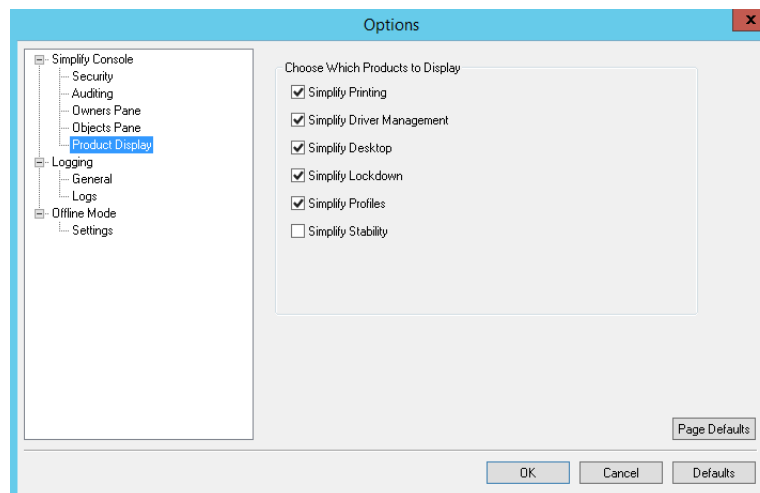
After Simplify Console has been installed, a shortcut icon for the application is placed on your desktop. An option for Simplify Console is also available from your Start menu. You can double-click the desktop icon to launch Simplify Console, or you can select the option from your Start menu (Start > All Programs > Tricerat > Simplify Console).

Figure 1-1: Simplify Console desktop shortcut



The *first* time that you start Simplify Console, a message opens asking which products that you want to display in the console: Simplify Printing, Simplify Desktop, Simplify Lockdown, and/or Simplify Profiles. By default, all products are selected for display. Clear a selection to remove the product from the Simplify Console display. After you make your selections, and then click OK, Simplify Console opens.

Figure 1-2: Products to display message

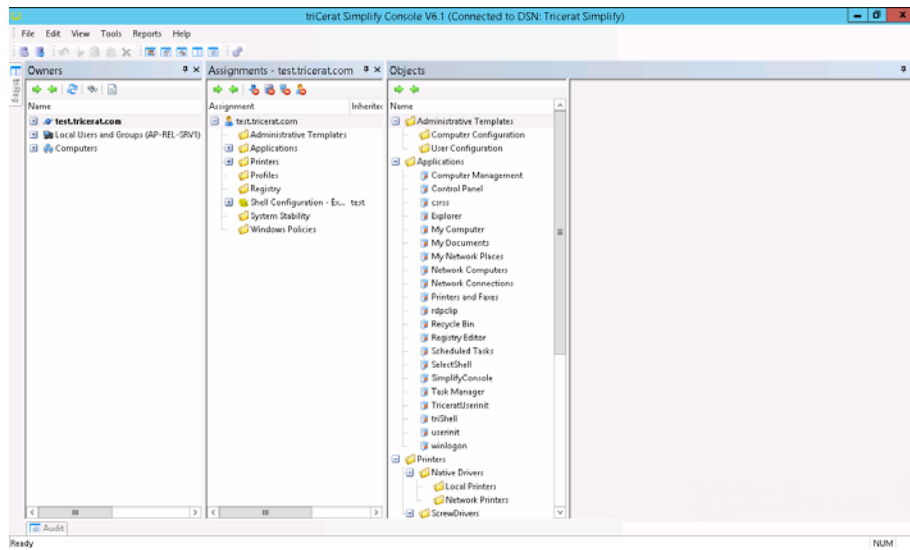




You can always change the products that are or are not displayed in the Simplify Console. See [“Specifying Simplify Suite Options” on page 30](#). Simplify Stability is a legacy product. For assistance with this product, contact Tricerat.

When you start Simplify Console, it establishes and maintains a connection with the SQL Server ODBC data source that was configured prior to installation. This data source is used to store all persistent data that is related to the operation of Simplify Suite. If Active Directory is in use, then the Simplify Console queries Active Directory to produce a hierarchical list of owners, which are entities that can receive assignments of objects and/or configuration settings such as shell preference in the Simplify Suite environment.

Figure 1-3: Simplify Console window



The Simplify Console Layout

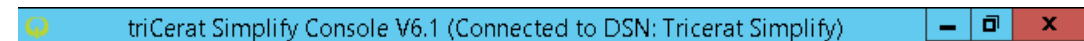
The Simplify Console user interface consists of a single window that has four major components – the title bar, the main menu, the toolbar, and the panes. See:

- “Title bar” below.
- “Main menu” below.
- “Toolbar” below.
- “Panels” on page 22.

Title bar

“Tricerat Simplify Console” and the version number for the currently installed version are displayed in the title bar at the top of the Simplify Suite window. The title bar also displays the Data Source Name (DSN) for the Simplify database.

Figure 1-4: Simplify Console title bar



To see the version number for each component that has been installed for Simplify Suite, on the main menu, click Help > About Simplify Console.

Main menu

By default, the Simplify Console main menu is docked beneath the title bar. The menu is set up in a standard Windows format with menu commands grouped into menus (File, Edit, View, Tools, Report, and Help) across the menu bar. Some of these commands are available in other areas of the console. You can dock the main menu in a different location, or you can float it, which means that it is not confined to a specific location. See “Customizing the Simplify Console Layout” on page 24.

Figure 1-5: Simplify Console main menu



Toolbar

By default, the Simplify Console toolbar is docked beneath the main menu. The toolbar provides quick access to all the Simplify Console functions. The toolbar is divided into four separate tear-off palettes: File, Edit, View, and Tools. You can click the Tear Off icon for a palette (the three vertical dots in a row at the far left of the pallet), and then drag the palette to a new location. When you tear off a toolbar palette, you can dock the palette in a different location, or you can float it, which means that it is not confined to a specific location. (See “Customizing the Simplify Console Layout” on page 24.) You can also hold your mouse pointer over an icon on the toolbar to open a tooltip that describes the icon’s function or

purpose. See [Figure 1-6](#) and [Table 1-1](#) below.

Figure 1-6: Simplify Console toolbar



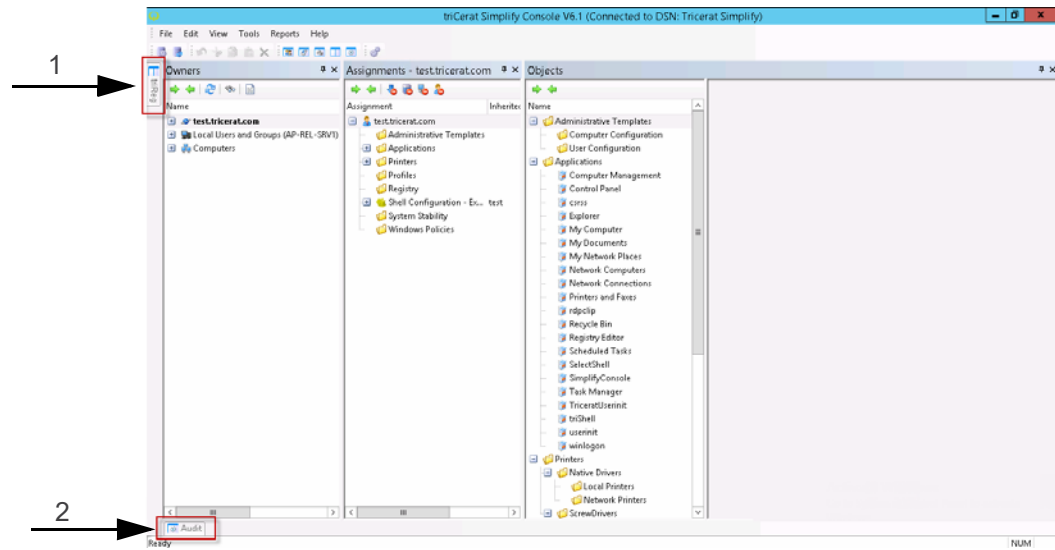
Table 1-1: Simplify Console toolbar icons

Icon	Description
	Manage Database icon – Opens the Manage Data Sources dialog box, which contains all the functions and options for managing the data sources to which the Simplify Suite connects. See “The Manage Data Sources Tool” on page 76 .
	Refresh Database icon – Refreshes the Simplify database. Note: This option is also available from the Simplify Console main menu under File > Refresh Database.
	Undo icon – Enabled only when entering data in a free text field on an Object form. Click this icon to delete any text that you have entered and clear the field or reset the field to its default value.
	Cut icon – Removes a selected entity from its physical location, and stores it in a buffer for pasting in another location. Note: Applicable only for free text fields on an Object form.
	Copy icon – Copies a selected entity to the client clipboard in preparation for pasting it in to another location. Note: Applicable only for free text fields on an Object form.
	N/A.
	Show Owners icon – If not already opened, then opens the Owners pane. See “The Owners Pane” on page 33 . Note: This option is also available on the View menu (View > Owners).
	Show Assignments icon – If not already opened, then opens the Assignments pane. See “The Assignments Pane” on page 37 . Note: This option is also available on the View menu (View > Assignments).
	Show Objects icon – If not already opened, then opens the Objects pane. See “The Objects Pane” on page 40 . Note: This option is also available on the View menu (View > Objects).
	Show triReg icon – If not already opened, then opens the triReg pane, which is a tool that you use for viewing and managing Simplify Profiles. See “The triReg Tool” on page 193 . Note: This option is also available on the View menu (View > triReg).
	Show Audit icon – If not already opened, then opens the Audit pane. See “Auditing the Simplify Database” on page 66 . Note: This option is also available on the View menu (View > Audit).
	Options icon – Opens the Options dialog box. See “Specifying Simplify Suite Options” on page 30 . Note: This option is also available on the Tools menu (Tools > Options).

Panes

The Simplify Console window has three primary panes in which you carry out the majority of activities that are needed to manage your Simplify Suite installation: the Owners pane, the Assignments pane, and the Objects pane. When the Simplify Console first opens, its single window opens in its *default layout*, which consists from left to right of the opened and docked Owners pane, Assignments pane, and Objects pane. The panes are docked in the workspace for the window. The triReg tool and the Audit tool are also open, but the pane interfaces for these tools are hidden. Instead, pane tabs are displayed. The triReg pane tab is docked at the upper left edge of the Simplify Console window, and the Audit tab pane is docked at the lower left edge of the window.

Figure 1-7: Simplify Console window, default layout with docked panes



Item	Description
1	Hidden triReg tool.
2	Hidden Audit tool.

Any pane or pane group in the Simplify Console window can be in one of four states:

- Docked –The pane is visible in the Simplify Console window and its location is confined to a specific area of the workspace.
- Floating –The pane is visible in the Simplify Console window, but its location is not confined to a specific area of the workspace. Instead, you can independently change its size and/or position.
- Hidden –The pane is not visible in the Simplify Console window. Instead, a corresponding pane tab is displayed at an edge of the Simplify Console window.
- Closed – Neither the tab nor a corresponding tab pane is displayed in the Simplify Console window.

A variety of options are available for working with the panes to customize the layout of the Simplify Console window to better suit your working needs. See [“Customizing the Simplify Console Layout” on page 24](#).

Customizing the Simplify Console Layout

When Simplify Console first opens, its single window opens in its *default layout*, which from left to right consists of the following opened and docked panes: Owners, Assignments, and Objects. The panes are docked in the workspace for the window. The triReg tool and the Audit tool are also open, but the pane interfaces for these tools are hidden. Instead, pane tabs are displayed. The triReg pane tab is docked at the upper left edge of the Simplify Console window, and the Audit tab pane is docked at the lower left edge of the window. You can do any or all of the following to customize the layout:

- Move (dock or float) the main menu or the toolbar. See [“To dock or float the main menu and/or toolbar palettes”](#) below.
- Open/close a pane. See [“To open or close a pane”](#) below.
- Resize a pane. See [“To resize a pane”](#) on page 25.
- Auto hide a pane. See [“To auto hide a pane”](#) on page 26.
- Show an auto-hidden pane. See [“To show an Auto Hidden pane”](#) on page 27.
- Float a docked pane. See [“To float a docked pane”](#) on page 27.
- Create a pane group. See [“To create a pane group”](#) on page 28.
- Reset the Simplify Console to its default layout. See [“To reset the Simplify Console to its default layout”](#) on page 29.

To dock or float the main menu and/or toolbar palettes

When Simplify Console opens for the first time, by default, the main menu is docked in the top left corner of the window, and the toolbar is docked below the main menu. Both the main menu and toolbar are tear-off palettes, which means that you can click the Tear Off icon (the three vertical dots in a row at the far left of the pallet), and then drag the palette to a new location. When you drag the menu and/or toolbar, you can dock it on any of the four edges of the console window, or you can float it above the window.



If you dock or float the main menu and/or the toolbar, then File > Reset Layout does not return these components to their default locations. Instead, you must close the Simplify Console, and then open it again. If you float a toolbar palette, and then close the palette, you can right-click anywhere on the toolbar, and on the context menu that opens, select the palette (File, Edit, View, and Tools) to open it again.

To open or close a pane

You have two options for opening a pane in the Simplify Console:

- On the main menu, click File, and then click the appropriate menu item. For example, to open the Owners pane, on the main menu, click File > Owners.

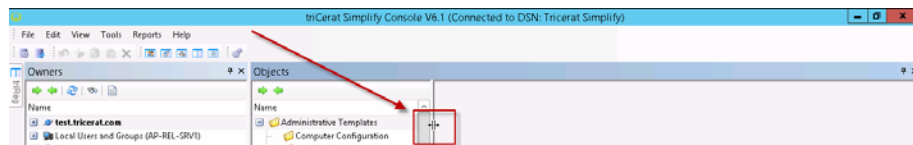
- On the Simplify Console toolbar, click the appropriate icon. See [“Toolbar” on page 20](#).
- To close a pane at any time, in the upper right corner of the pane, click the Close (x) icon.

To resize a pane

When a pane first opens in the Simplify Console, it is set to a default size. You can resize any pane as needed to better suit your working needs. To resize a pane in the Simplify Console, do the following:

1. Hold your mouse pointer on the edge of a pane, or on the border that separates two panes until the cursor changes to a bi-directional arrow.
2. Hold down the left mouse button, drag the edge or border until the pane is resized to your preference, and then release the left mouse button.

Figure 1-8: Resizing a pane

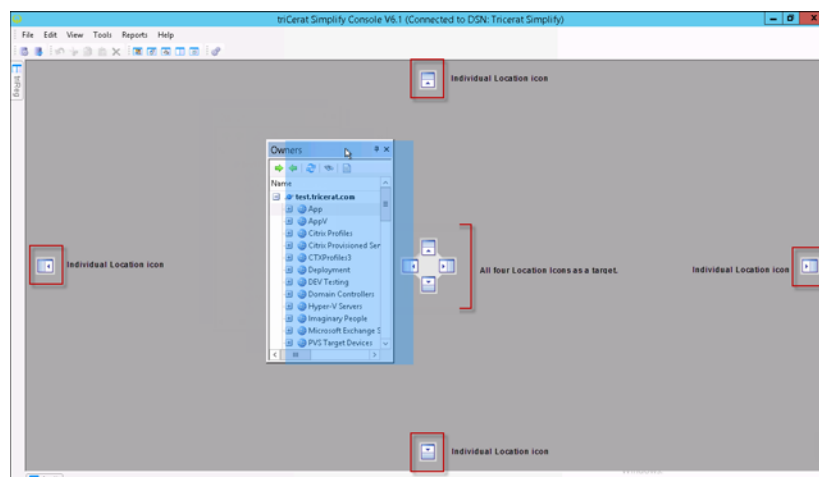


To dock a pane

When the Simplify Console first opens, its single window opens in its default layout. You can move a window pane from its default location by *docking it*, which means to attach it to a different part of the Simplify Console window. To dock a pane in a different position in the Simplify Console window, do the following:

1. Click anywhere in the title bar of the pane, and then drag it until individual dim location icons are displayed on the left, right, top, and bottom of the workspace, or all four location icons are displayed as a target in the middle of the workspace.

Figure 1-9: Docking a pane



2. Drop the pane onto the appropriate location icon.

To auto hide a pane

The Auto Hide feature minimizes a pane and provides a pane tab in its place for dynamically displaying the pane. The window pane is “pinned” as a tab to an edge of the Simplify Console window so that you have more room for your workspace. You can hold your mouse pointer over the pane tab to open and temporarily display the pane. You can then move your mouse pointer off the pane tab to minimize the pane again. If Auto Hide is applicable for a pane, then an Auto Hide icon (a pushpin icon) is displayed in the upper right corner of the pane. To auto hide a pane, click the Auto Hide icon. The location of the pane tab for an auto hidden pane in the Simplify Console is determined by the location of the open pane in the workspace before it was auto-hidden. For example, if you auto hide the Owners pane while the panes are displayed in their default layout, then the Owners tab pane is displayed in the upper left corner of the workspace. If you auto hide the Owners pane while it is displayed at the bottom of Simplify Console workspace, then the Owners pane tab is displayed at the bottom of the Simplify Console workspace.

Figure 1-10: Auto hiding a pane while in the Simplify Console default layout

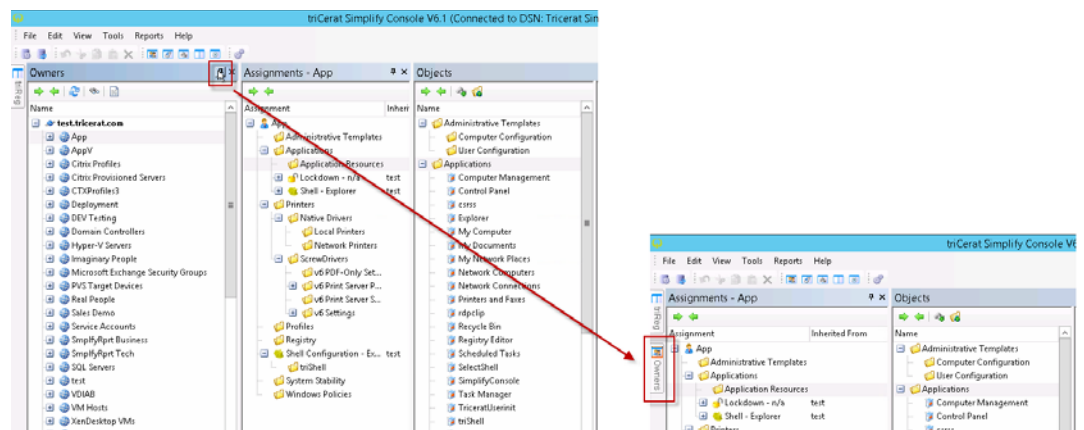
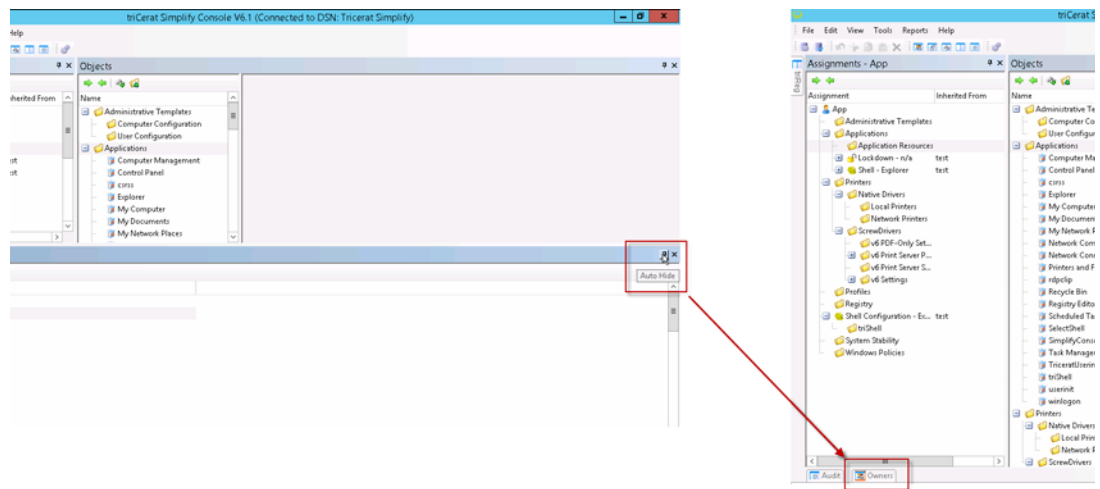


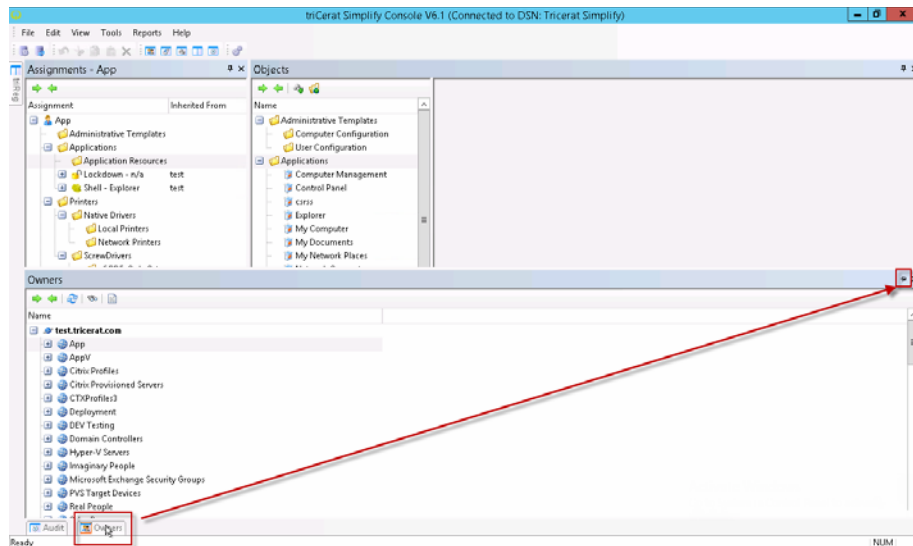
Figure 1-11: Auto hiding a pane with any layout other than the default layout



To show an Auto Hidden pane

The Auto Hide feature minimizes a pane and provides a pane tab in its place for dynamically displaying the pane. You can hold your mouse pointer over the pane tab to open and temporarily display the pane. The Auto Hide icon is displayed horizontally, indicating that the pane is currently auto-hidden. You can move your mouse pointer off the pane tab to auto hide the pane again, or you can click the Auto Hide icon to display the pane. If you show an auto-hidden pane, then it is docked in the position in which it was located before it was auto-hidden.

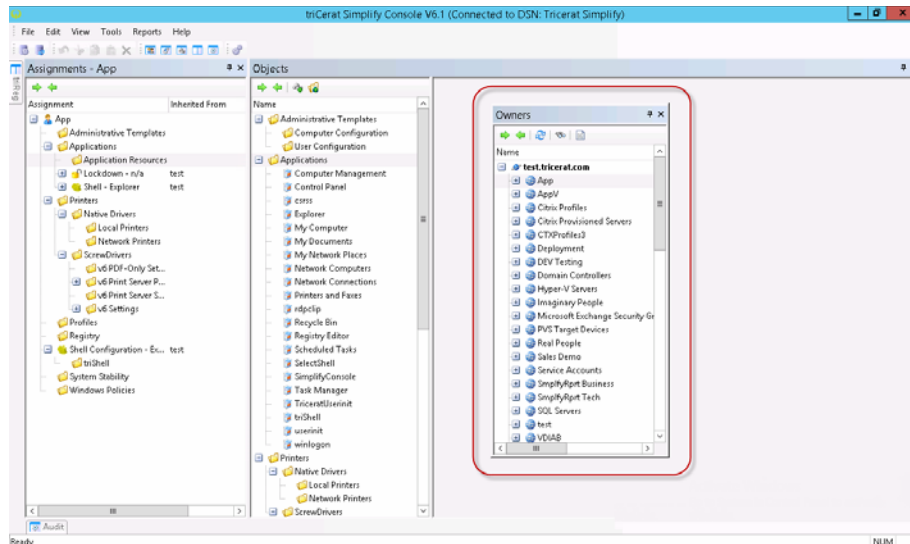
Figure 1-12: Showing an auto-hidden pane



To float a docked pane

A *floating* pane is a pane that is visible in the Simplify Console window, but its location is not confined to a specific area of the workspace. Instead, you can independently change its size and/or position. You can float any docked pane. To float a docked pane, double-click the pane title bar. The pane is immediately undocked and set to a default size and location in the workspace. You can click and hold your mouse pointer in the title bar of a floating pane to make it the active pane, and then drag to any location in the Simplify Console workspace. You can also resize the pane. (See [“To resize a pane” on page 25.](#)) If you double-click in the title bar of a floating pane again, then the pane is docked again in the position in which it was located before it was floated. See [Figure 1-13 on page 28.](#)

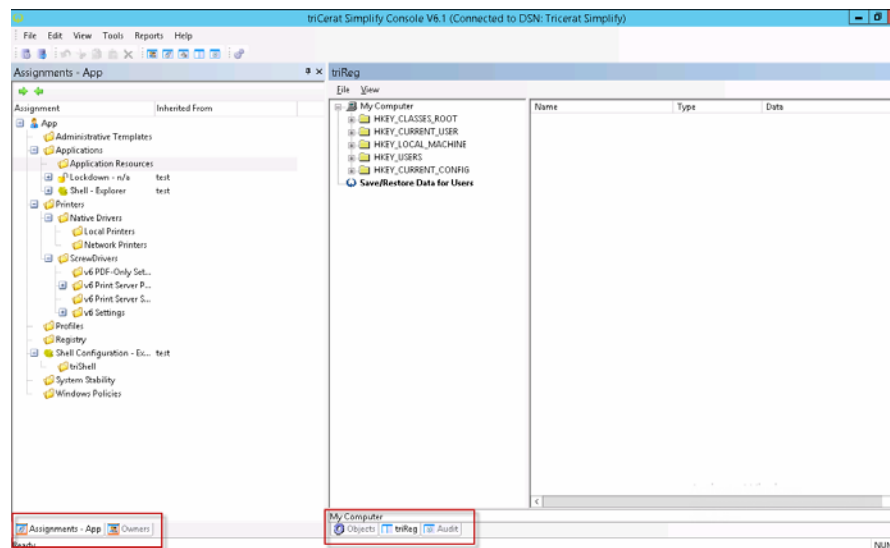
Figure 1-13: Floating a docked pane



To create a pane group

You can combine two or more pane tabs to create a pane group. To create a pane group, click anywhere in the title bar of an open pane, and then drag the pane onto the title bar of another open pane. Both panes are collapsed into pane tabs. The pane that you dragged remains open. The other pane is closed. The series of tabs that represent the panes are titled accordingly, and they are displayed in a horizontal row below the pane group. To open and bring any pane into focus in a pane group, click the appropriate tab. All the actions that are applicable for a single pane (floating, docking, auto hiding, showing an auto-hidden pane group, resizing a pane, and closing) are also applicable for a pane group.

Figure 1-14: A pane group in the Simplify Console workspace



To reset the Simplify Console to its default layout

If you make changes to the default layout of the Simplify Suite, then these changes are “remembered” even after exiting (File > Exit), and then opening Simplify Console again. To reset the display of the *panes* in Simplify Console to its default layout at any time, on the main menu, click View > Reset Layout.




If you have docked the main menu and/or toolbar in a different location, or floated the main menu and/or toolbar, then Reset Layout does not return these window items to their default locations. Instead, you must close the Simplify Console, and then open it again.

Specifying Simplify Suite Options

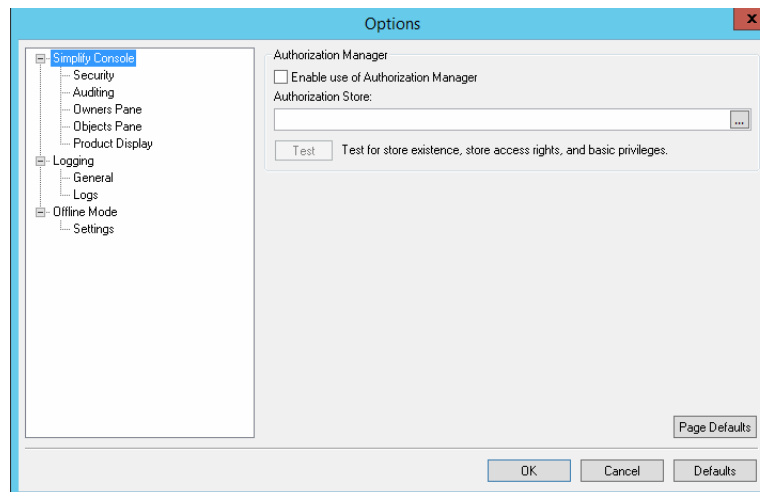
Typically, after installation, the default values that are specified for Simplify Suite, including the Simplify Console, are satisfactory for most organizations and do not require modification; however, you always have the option of **modifying** any or all the default values to better suit your working needs. The default Simplify Suite options also include Logging options, which can be used to generate a Simplify Suite status log file that provides general information about your Simplify Suite installation such as OS version, ODBC data sources, and so on, or specific log files that are used solely for debugging purposes.

To specify Simplify Suite options

1. On the Simplify Console main menu, click Tools > Options, or on the toolbar, click the Options icon .

The Options dialog box opens.

Figure 1-15: Options dialog box



2. Modify any of the default settings as needed.



If you modify one or more default values, then to reset all values for a selected option (page) in a single step, click Page Defaults. To reset all values for all options in a single step, click Defaults.

Option	Description
Simplify Console	
Security	Authorization Manager

Option	Description
Auditing	<ul style="list-style-type: none"> Audit Control – By default, auditing is enabled. To disable auditing, clear Enable Auditing. Audit Data Migration Control – If auditing is enabled, then by default, all audits for the last 30 days are displayed in the Audit pane. Modify the value in the Short Term field as needed. <p>Note: For detailed information about auditing the Simplify database, see “Auditing the Simplify Database” on page 66.</p>
Owners Pane	<ul style="list-style-type: none"> Load – By default, Ignore Trusted Domains and Preload All Owners at startup are not selected. Select one or both of these options to enable them. Search – By default, the maximum number of owners that can be returned by a Search is 50. Modify this value as needed.
Objects Pane	<ul style="list-style-type: none"> Auto-Query Printers on Save – Enabled by default. To disable this option, clear it. Perform Query Printers as a Background Test – Disabled by default. To enable the option, select it.
Product Display	<p>Choose which products are to be displayed in the Simplify Console. All products are selected by default. To remove a product from the display, clear its selection.</p> <ul style="list-style-type: none"> Simplify Printing Simplify Desktop Simplify Lockdown Simplify Profiles Simplify Driver Management <p>Note: Simplify Stability is a legacy product. For assistance with this product, contact Tricerat.</p>
Logging	
General	<p>Suite Status Log – Click Generate to generate the Suite Status log, which details general information about your Simplify Suite installation, including the OS version, the Suite and file version, and the relevant ODBC data sources.</p> <p>Note: After you click Generate, the Save As dialog box opens, in which you can leave the default values for the storage directory and file name for the Suite Status log (C:\Program Files\Tricerat\Simplify Suite\Simplify Console and SuiteStatus.log) as-is, or you can modify one or both values as needed.</p>
Logs	<p>Logs – You use these logs strictly for debugging purposes, and you should enable them only under the direction of Tricerat support.</p>
Offline Mode	
Settings	<ul style="list-style-type: none"> Enable Offline Mode for Simplify Profiles – By default, disabled. Select Enable Offline Mode for Simplify Profiles to enable it. For detailed information about Offline mode for Simplify Profiles, see “Simplify Profiles” on page 118. Enable Offline Mode for Simplify Desktop – By default, disabled. Select Enable Offline Mode for Simplify Desktop to enable it. For detailed information about Simplify Desktop, see the <i>Simplify Desktop User Guide</i>.

3. Click OK.

The Options dialog box closes. The new values are immediately applied to your Simplify Suite installation.

Chapter 2

The Simplify Console Panes

Simplify Console consists of three primary panes – the Owners pane, the Assignments pane, and the Objects pane. This chapter details these three different panes, including their structures and functions.

This chapter covers the following topics:

- [“The Owners Pane” on page 33.](#)
- [“The Assignments Pane” on page 37.](#)
- [“The Objects Pane” on page 40.](#)

The Owners Pane

An *owner* in the Simplify Console is an entity that can receive assignments and other configuration settings. An owner can be one of four types: a user, a group, a computer, or an Organizational Unit (OU) /container. Simplify Console pulls in all entities that are in Active Directory based on the Windows domain in which it is running and displays these entities in a [hierarchical tree structure](#) in the Owners pane. A [toolbar](#) is displayed at the top of the Owners pane. The toolbar displays icons for manipulating the view of the Owners tree, searching for specific owners, and refreshing the Active Directory.



In the Simplify Console, OUs and Containers are considered to be the same owner type.

Owners pane hierarchical tree structure

See [Table 2-1 on page 34](#) for a description of the items in the Owners pane.

Figure 2-1: Owners pane

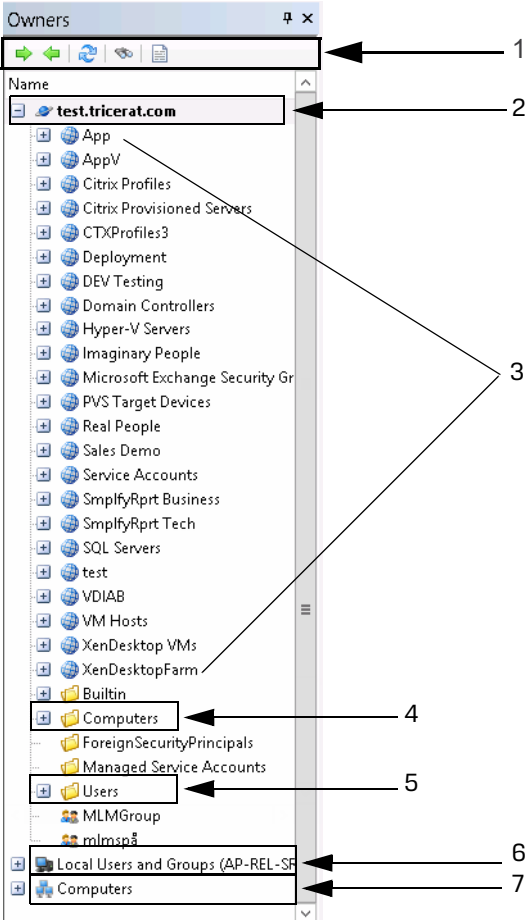


Table 2-1: Owners pane items

Item	Description
1	Owners pane toolbar
2	Active Directory primary directory
3	Organizational Units
4	Container
5	Container
6	Local users and groups
7	Customer Owners

The *first level (top-level)* in the hierarchy of the Owners tree is as follows:

- The Primary domain, which is the domain of the host computer (the computer on which Simplify Suite is installed).
- Trusted domains (0 or more).
- Local Users and groups – Local accounts on the Terminal Server.
- Custom owners - Custom owners are client computers that are specified by either (DSN) name, IP address, or a range of IP addresses.

OUs and containers are always found at the second level under the primary domain and/or trusted domain entries. Any other second level and below entries in the Owners tree can vary widely depending on your organizational needs, but some common structures include the following:

- Groups can also be found at the at the second level under the primary domain and/or trusted domain entries.
- Nested OUs are also possible, resulting in third-level and below entries. Groups and/or users can be found under second-level OUs and nested OUs.
- Groups and users can also be found at the second level under OUs or Containers, Local Users and Groups, and Custom Owners.
- Computers can be found at the second-level under OUs or Containers.

Unique icons are used to identify the different owner types. An owner's name is displayed in bold in the Owners pane if one or more direct assignments have been made to the owner. See [Table 2-2](#) and [Figure 2-2 on page 35](#).



For a definition of a direct assignment, see [“The Assignments Pane” on page 37](#).

Table 2-2: Owners pane icons







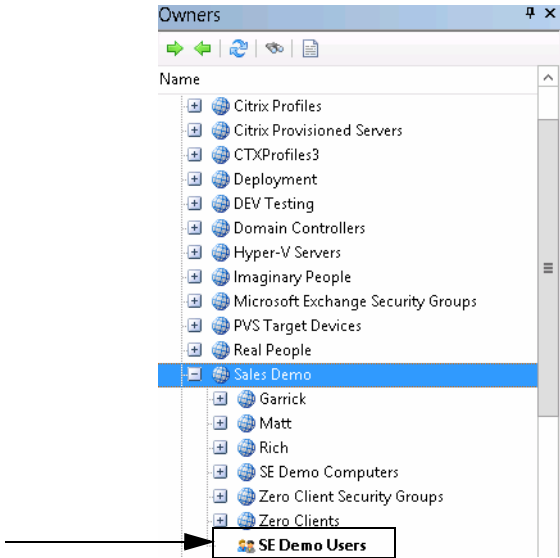
Icon	Owner Type
	Primary domain or Trusted Domain
	Container under a domain or a group under a Customer Owner
	Organizational Unit for a domain
	Group
	User
	Custom Owner (Client computer specified by Name, IP Address, or IP Address Range. Groups of custom owners are also allowed.)

Figure 2-2: Owner with a direct assignment








The hierarchical structure of the Owners pane is not simply an organizational tool. It also serves a practical purpose for inheritance of objects by owners. See [“Owner Inheritance”](#) on page 44.

Owners pane toolbar

A toolbar is displayed at the top of the Owners pane. The toolbar displays icons for manipulating the view of the Owners tree, searching for specific owners, and refreshing the Active Directory.

Figure 2-3: Owners pane toolbar

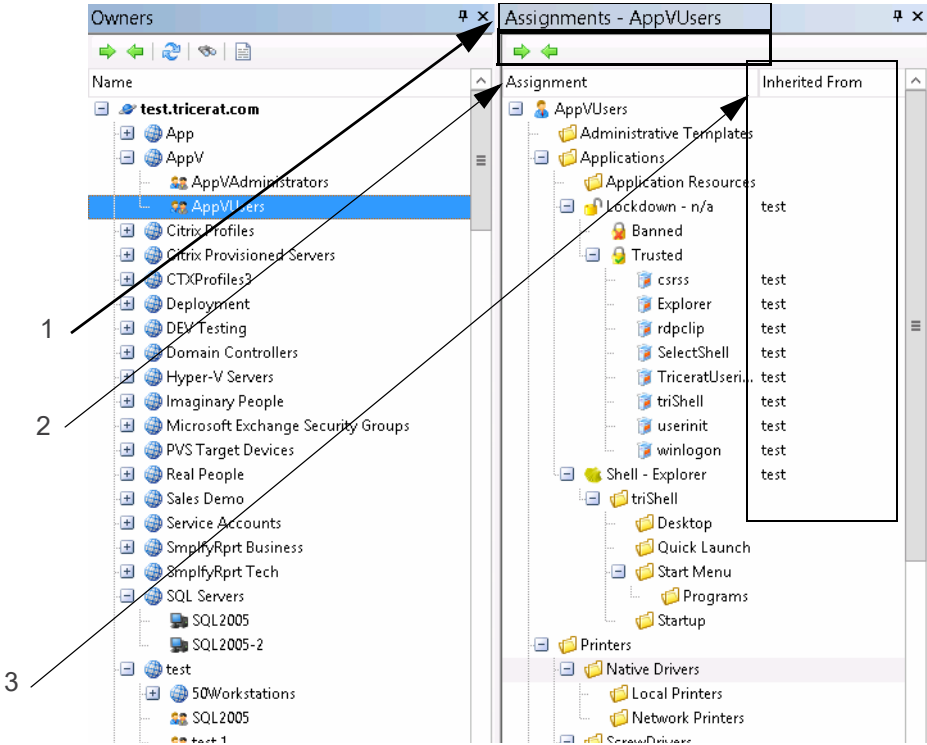


Icon	Description
	Expand icon – Expands the Owners tree structure.
	Collapse icon – Collapses the Owners tree structure.
	Refresh icon – Refreshes the Active Directory.
	Search Owners icon – Opens the Search Owners dialog box, which provides options for searching owners in the Owners pane. See “To search for owners in the Owners pane” on page 49.
	Generate Owners Report – TBD

The Assignments Pane

The Assignments pane displays the objects and configuration settings that have been assigned to the owner that is currently selected in the Owners pane. The Assignments pane is comprised of a **toolbar** and two distinct columns of information. The right column is a hierarchical tree structure that is very similar to the tree structure of the Owners pane. The structure shows the objects and settings that are assigned to the owner that is currently selected in the Owners pane. The name of the currently selected owner is displayed in the title bar of the Assignments pane, and the owner name is also displayed as the top level in the Assignments tree structure. As you select different owners in the Owners pane, the display of objects and configuration settings in the Assignments tree is dynamically updated. As you select different branches (objects or settings) in the Assignments tree, the icons on the toolbar are also dynamically updated. The right column in the pane indicates the name of the owner from which an object was inherited, if applicable, including any owners that are causing a denial of the object.

Figure 2-4: Assignments pane



Item	Description
1	AppVUsers owner selected in the Owners pane and displayed in the title bar of Assignments pane.
2	Assignments pane toolbar.
3	Inheritance information.

Two types of assignments are possible in the Assignments pane – a *direct* assignment and an *inherited* assignment.

- A direct assignment is an active action. To make a direct assignment to an owner, you first select the owner in the Owners pane, then you select the object in the Objects pane, and then finally, you drag the object to the appropriate branch in the Assignments tree.
- An inherited assignment is a passive action. All children of an owner automatically inherit any assignments that are made to the parent owner. For example, if you assign a printer to the Sales Demo domain, then any user who is a member of the Sales Demo domain is automatically assigned (inherits) this printer as well. Moreover, any new members that are added to the Sales Demo domain also are automatically assigned (inherit) this printer.

Only direct assignments can be deleted from an owner. Inherited assignments are for display purposes only and they cannot be deleted; however, they can be designated to be blocked or ignored for a particular owner and they can also be denied. Direct assignments can also be denied for an owner. See [“Managing Assignments” on page 58](#).

With the exception of the following, all changes that are made to an owner’s assignment or configuration data occur exclusively within the Assignments pane:



- Objects/groups are deleted in the Objects pane
- Objects/groups are enabled/disabled in the Objects pane.
- Objects moved in to/out of groups in the Objects pane.











For detailed information about objects and groups in the Owners pane, see [“The Objects Pane” on page 40](#).

Assignments pane toolbar

Two icons are always displayed on the Assignments pane toolbar – the Expand icon and the Collapse icon. These icons function identically in the Assignments pane as they did in the Owners pane – to expand or collapse the Assignments tree structure. As you select different branches in the Assignments tree, other icons on the toolbar are dynamically updated.

Icon	Description
Icons that are always displayed	
	Expand icon – Expands the Assignments tree structure.
	Collapse icon – Collapses the Assignments tree structure.

Icon	Description
Icons that are displayed when the owner (top-level) is selected in the Assignments tree	
	<p>Block Inherited Assignments icon – A toggle for blocking inherited assignments for a selected owner and all the owner’s children. Click once to enable blocking. The toggle is highlighted with a blue square. Click again to disable blocking. The highlighting blue square is removed. See “To block an owner from receiving an assignment” on page 63.</p>
	<p>Block Server Assignments icon – A toggle for blocking all server assignments for a selected owner and the owner’s children. Click once to enable blocking. The toggle is highlighted with a blue square. Click again to disable blocking. The highlighting blue square is removed. See “To block an owner from receiving an assignment” on page 63.</p>
	<p>Block Client Assignments icon - A toggle for blocking all client assignments for a selected owner and the owner’s children. Click once to enable blocking. The toggle is highlighted with a blue square. Click again to disable blocking. The highlighting blue square is removed. See “To block an owner from receiving an assignment” on page 63.</p>
	<p>Block Owner Assignments - A toggle for blocking all of the owner’s (user’s) direct assignments as well as all the owner’s inherited assignments. Click once to enable blocking. The toggle is highlighted with a blue square. Click again to disable blocking. The highlighting blue square is removed. See “To block an owner from receiving an assignment” on page 63.</p>
Other icons	
	<p>Delete Assignment icon – Displayed when a direct assignment is selected in the Assignments tree. Click this icon to delete the direct assignment for an owner. See “To delete a direct assignment of an object for an owner” on page 61</p>
	<p>Deny Assignment icon – Displayed when a either a direct assignment or an inherited assignment is selected in the Assignments tree. Click this icon to deny the inherited assignment for the parent owner as well as all its children. See “To deny an assignment of an object” on page 62.</p>
	<p>Permit Assignment icon – Displayed when a denied assignment is selected in the Assignments tree. Click this icon to permit the assignment for the parent owner and all its children, or just the selected child owner. See “To permit an assignment of an object” on page 63.</p>
	<p>Select Item in Objects Tree icon – Always displayed when any object (a direct assignment, or permitted or denied) is selected in the Assignments tree. Click this icon to highlight the object in the Objects Tree and update the object form display with the configuration settings for the selected object.</p>

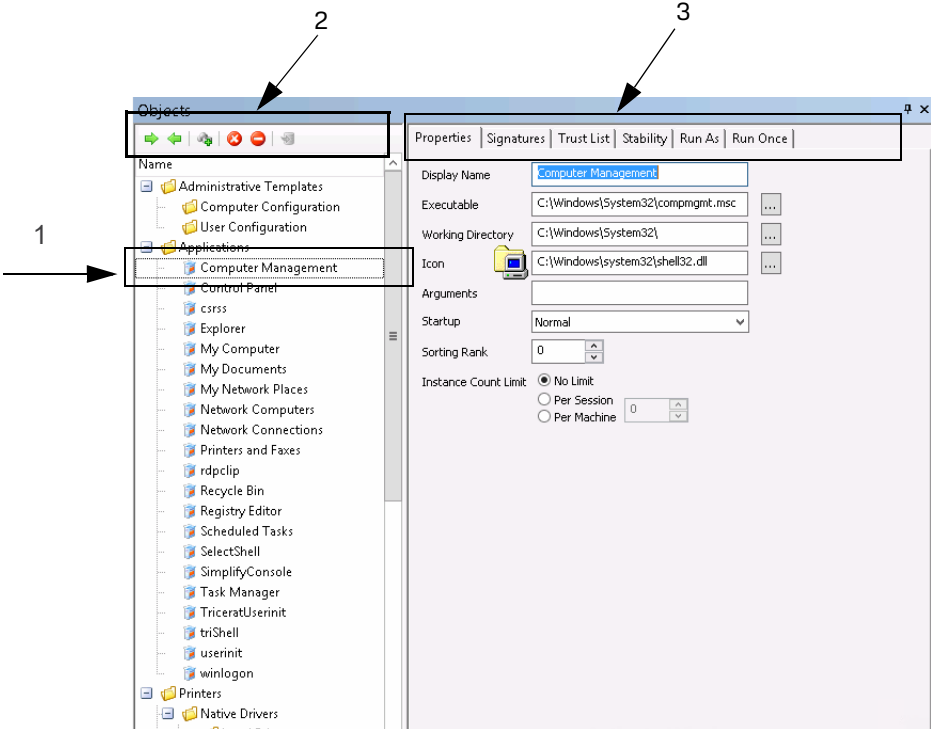
The Objects Pane

Objects are things that you can assign to an owner. Examples of objects include applications, printers, and configuration settings. An *object group* is a logical collection of objects. You create, configure, and manipulate objects and object groups in the Objects pane. The Objects pane is comprised of a *toolbar*, and two sub-panes that are vertically separated. The left sub-pane contains the Objects toolbar and the Objects tree. Objects are organized by *object type* in the Objects tree. The object types that are displayed in the Objects tree depend upon the components of the Simplify Suite that your organization has licensed. All the objects that are currently defined in the Simplify Suite for the licensed object types are displayed in the Objects tree. Objects are sorted alphabetically by name within an object type. Depending on the type of object that is selected in the Objects tree, a tabbed *object form* might be displayed in the right sub-pane.



An object form is displayed only if a single object is selected in the Objects pane. At all other times, the right sub-pane is blank.

Figure 2-5: Objects pane



Item	Description
1	Selected object.
2	Objects toolbar. Displayed in left sub-pane.
3	Tabbed object form displayed in right sub-pane for selected object.

Object groups


An *object group* is a logical collection of objects. Object groups are provided in the Simplify Console as a convenient mechanism for working with multiple objects at the same time. For example, you can use object groups to:

- Group together related objects of a particular type. For example, you can group together Word, Excel and PowerPoint application objects under an Office object group.
- Assign a group of objects to an owner instead of assigning each individual object one at a time.
- Delete or disable a group to delete or disable all the objects in the group at the same time.

Object groups are applicable only in the Simplify Console. Nested object groups are not supported. The Simplify Suite server components ignore object groups. Only the underlying object assignments are considered. When you add/remove objects to/from a group, the objects are implicitly assigned to/unassigned from the owners to which the group has been assigned. If you delete objects from a group, or you delete the entire object group, then all the associated assignments for the objects or group are also deleted. Even if an object is part of an object group, you can still independently assign the object.









Object forms

Depending on the type of object that is selected in the Objects tree, an *object form* might be displayed. An object form groups together related configuration parameters for the selected object. The form controls are loaded with the settings for the currently selected object. Each object type has its own unique object form.

If you change any setting on a form for a selected object, then an Apply Changes icon  is enabled on the Objects pane toolbar. You must click this icon to manually apply the changes to the selected object. If you make changes to the configuration parameters for a selected object, and then attempt to select another object in the Objects tree before clicking the Apply Changes icon, a message opens asking you if you want to apply the changes to the object settings. You must click Yes or No in the message dialog box to close the dialog box before you can select a different object in the Objects tree.

Objects pane toolbar

Two icons are always displayed on the Objects pane toolbar: the Expand icon and the Collapse icon. These icons function identically in the Assignments pane as they did in the Owners pane and the Objects pane – to expand or collapse the tree structure of the pane. As you select different objects in the Objects pane tree structure, other icons on the toolbar are dynamically updated.

Icon	Description
Icons that are always displayed	
	Expand icon – Expands the Objects tree structure.
	Collapse icon – Collapses the Objects tree structure.
Other icons	
	Add New Object icon – Displayed when a folder for which it is appropriate to add a new object is selected in the Objects tree. Click this icon to add a placeholder in the Objects tree for adding a new object. See “To add a new object” on page 52.
	Add New Group icon – Displayed when a folders for which it is appropriate to add a new object group is selected in the Objects tree. Click this icon to add a placeholder in the Objects tree for adding a new object group. See “To add a new object group” on page 54.
	Delete Selected Item(s) icon – Displayed when one or more objects and/or object groups are selected in the Objects tree. Click this icon to delete the objects and/or object groups from the Objects tree. See “To delete an object or object group” on page 54. Note: When you delete objects from the Objects tree, the objects are removed from the Simplify Driver Management Import Tool and all assignments for the objects are also deleted.
	Disable Selected Item(s) icon – Displayed when one or more objects and/or object groups are selected in the Objects tree. Click this icon to disable the objects and/or object groups in the Objects tree. See “To disable an object” on page 55. Note: When you disable objects in the Objects tree, the objects are not removed from the Objects tree nor are any associated assignments deleted. The object is simply not effective/operational for any owner to which it is assigned.
	Enable Selected Item(s) icon – Displayed when one or more disabled objects and/or object groups are selected in the Objects tree. Click this icon to enable the objects and/or object groups in the Objects tree. See “To enable an object” on page 56.
	Apply Changes icon – Displayed when any existing object is selected in the Objects tree and it is enabled when any modification is made to the configuration settings for the selected object. Also displayed and enabled after any new object is added to the Objects tree. Click this icon to save the configuration settings for any new or modified object in the Simplify Driver Management Import Tool.

Chapter 3

Managing the Simplify Suite with Simplify Console

Simplify Console is the management interface for all the Simplify Suite components. Simplify Console provides all the functions that are required for administering and maintaining the needed owners, objects, and assignments for your Simplify Suite installations.

This chapter covers the following topics:

- [“Owner Inheritance” on page 44.](#)
- [“Managing Owners” on page 49.](#)
- [“Managing Objects” on page 52.](#)
- [“Managing Assignments” on page 58.](#)

Owner Inheritance

Every time the Simplify Suite detects a new login session, the following information is examined and analyzed to build the hierarchical structure of the Owners tree:

- The user that is logging in to the system.
- The server that the user is logging in to.
- The client that the user is logging in from.

Each of these three primary owners is used as a foundation to locate additional related owners through Active Directory memberships and Custom Owners, which can be Groups, Computers, a single IP address, or a range of IP addresses. You can assign objects and object groups to these primary owners, or *parent owners*. Moreover, although OUs, Trusted Domains, and Containers are not primary owners in a Simplify Console session, you can assign objects or groups of objects to them just the same. Assignments are then inherited by the children of a parent owner, which is *owner inheritance*.

Owner inheritance determines the final results for all objects that each session of the Simplify Suite receives. Consequently, before you begin the process of assigning objects and/or object groups to owners and carrying out other administrative tasks in the Simplify Console, it is critical that you understand the concept of owner inheritance. This section details the following topics that are related to owner inheritance:

- [“Assignment conflicts”](#) below.
- [“Conflict resolution”](#) on page 46.
- [“Advanced features for conflict resolution”](#) on page 48.

Assignment conflicts

When you are assigning objects and settings to owners, you must be aware that some objects and settings require a single final result, which means that only one assignment is possible to resolve the conflict. Other objects and settings, however, allow for multiple assignments.

Single Result Settings

- Shell mode. See the *Simplify Desktop User Guide*.
- triShell configuration. See the *Simplify Desktop User Guide*.
- Lockdown mode. See the *Simplify Lockdown User Guide*.
- ScrewDrivers configuration. See [“Simplify Printing”](#) on page 77.
- Default printer setting. See [“Simplify Printing”](#) on page 77 or [“Simplify Driver Management”](#) on page 202.
- Specific policy settings (for example, Drive restrictions). See [“Simplify Profiles”](#) on page 118.

Multiple Result Settings

- Applications. See “Simplify Profiles” on page 118.
- Printers. See “Simplify Printing” on page 77 or “Simplify Driver Management” on page 202.
- Registry settings. See “Simplify Profiles” on page 118.
- Specific policy settings (for example, Drive mappings.) See “Simplify Profiles” on page 118.

In either case, a conflict can occur if the same object is assigned to two different owners, and the object is allowed for one of the owners, but denied for the other. For example, Jane Doe is a member of the Development Group and the Testing Group, and Printer A has been assigned to both groups; however, the printer is allowed for the Development Group and denied for the Testing Group. In this case, conflict resolution is a two-step process:

- First, the rank of each assignment is compared, where *rank* is defined as how close the assignment is to the owner. If the ranks of the assignments are different, then the rank of the assignment that is *closest* to the owner takes priority.
- If the ranks of the assignments are the same, then the inheritance statuses of the assignments (Deny or Allow) are compared, where a Deny *always* takes precedence over Allow.

In this example, the ranks of the assignments are identical. As a result, because a Deny *always* takes precedence over an Allow, Jane Doe is denied Printer A.

See Figure 3-1 below through Figure 3-3 on page 46 for an example of a Deny taking precedence over an Allow.

Figure 3-1: Printer assignment - An HP printer is assigned to the IP address range for a client computer (a client assignment). Any user who is at the Owings Mills site and logs in uses an IP address within this range, and thus, inherits the HP printer.

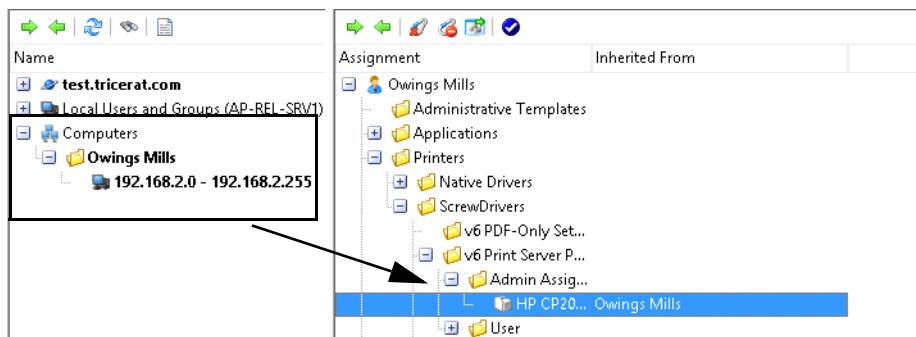


Figure 3-2: Printer assignment denied - The HP printer is now denied assignment for the IP address range.

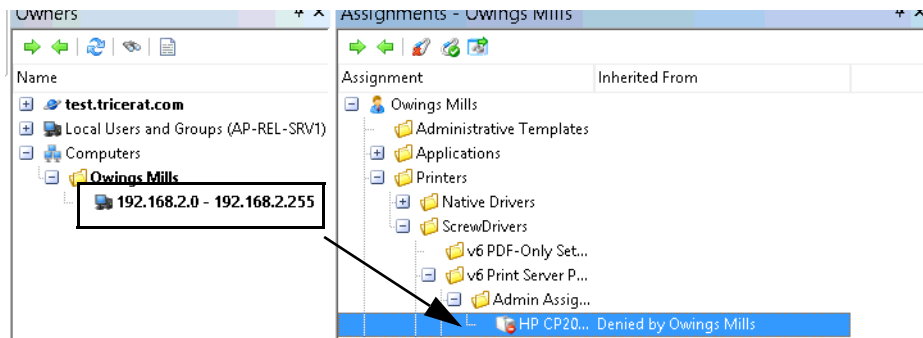


Figure 3-3: Assignment to SD Users group - Any user, however, who is a member of the SD Users group has been assigned this printer.



What are the results of denying the printer for an IP address range, but directly assigning the printer and permitting it for the SD Users group? Any member of the SD users group is assigned the HP printer UNLESS they are logging in from a client with an IP address that falls within the indicated range. If they log in from a client with an IP address that falls within the indicated range, then they are denied the printer assignment.

Conflict resolution

In general, when configuration conflicts arise between owners, the most restrictive setting takes precedence; however, there is an ordered approach to conflict resolution, and caveats do apply.

The first step in resolving assignment conflicts is to evaluate the owner hierarchy. For owners that are found in a tree structure, such as the Active Directory, assignments are evaluated from general to specific. This means that in the event of conflicting assignments, the owner that is found at a lower level in the hierarchy of the Owners tree overrides the owner that is found at the higher level. For example, if a domain is assigned the Explorer shell, but an OU is assigned triShell, then an owner in the OU receives trishell because this assignment is more specific to a user in the OU.

If the hierarchy is not clear, then conflicts are resolved according to the following:

- Assignments for users versus servers versus clients
- Assignments for owners at the same level (groups)

For shell and Lockdown settings, the most restrictive setting is chosen to resolve the conflict. These settings are hard-coded settings which, from the least restrictive to the most restrictive, are the following:

- Shell: Explorer < triShell < No Shell (Deny login)
- Lockdown: Don't use Lockdown < Learn mode < Use banned list < Use trusted list

For example, if the user hierarchy determines a shell setting of Explorer, but the server hierarchy determines a setting of triShell, then the more restrictive setting of triShell is applied to the end-user session.



For detailed information about assigning a Shell type to an owner, see the Simplify Desktop User Guide. For detailed information about assigning a Lockdown mode to an owner, see the Simplify Lockdown User Guide.

In the event of Windows Active Directory security groups, Simplify Suite treats the assignments that are at this level as more general than the user, but more specific than an OU. This applies even if the group is in a different OU than the user. If both the group and the user are in different OUs, then the Owners tree is evaluated for parents of both the user and the group.

For objects that do not have an inherent order of resolution, several tests are carried out to first determine if a resolution is possible.

- For user/server/client branches, the order of importance from least to most is the following: Client < Server < User. For example, if a server has ScrewDrivers Configuration A, and the user has ScrewDrivers configuration B, then the end result is ScrewDrivers configuration B.
- All groups are weighted higher than any OUs or Containers that are above them in the Active Directory. In the case of nested groups, however, the groups that contain the users directly are considered more specific to the users, and this results in the overriding of any settings that have been applied to groups of groups.

Finally, if none of these tests result in conflict resolution, then, ultimately, the resolution is determined by the order in which the objects are retrieved from the Active Directory and subsequently read from the Simplify database.



Although you can discover this information by reviewing the Tricerat owner enumeration on a case by case basis, Tricerat recommends that you use Deny Objects where appropriate to obtain a unique result. See [“To deny an assignment of an object” on page 62](#).

Advanced features for conflict resolution

In addition to normal assignment operations, several options are available to manipulate the final result of owner assignments. You can:

- Deny any assignment at a lower level in the Owners tree.
- Add the object as a denied object if the object is inherited through any other means.
- Specify that an owner is to ignore entire categories of assignments, which includes blocking all objects that are inherited from the tree above them, blocking server assignments, blocking client assignments, or blocking user assignments. For example, if an administrator is to receive assignments based solely on user membership, then the administrator can instruct the domain level to ignore all server and client assignments.



For detailed instructions about implementing advanced blocking features for conflict resolution, see [“To block an owner from receiving an assignment”](#) on page 63 in [“Managing Assignments.”](#)

Managing Owners

As the Simplify Console administrator, your duties for managing owners include [adding](#), [renaming](#), or [deleting](#) custom owners and auditing owners. Before you add a new custom owner, you might want to first [search](#) for the owner to confirm that it does not already exist, and you can also search for owners to review their assignments.



For information about auditing owners, see [“Auditing the Simplify Database” on page 66](#).

To search for owners in the Owners pane

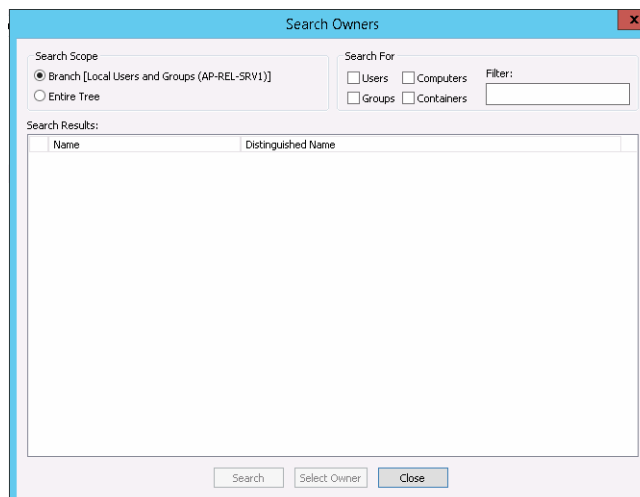
When you search for owners in the Owners pane, you can search a selected branch of the hierarchy, you can search the entire hierarchy, and you can search for one or more owner types. You can also specify a search filter to limit the search results.

1. Do one of the following:
 - To search for only those owners in a specific branch of the hierarchy, do one of the following:
 - Select the branch in the Owners pane, and then on the Owners pane toolbar, click the Search Owners icon
 - Right-click the branch that is to be searched, and on the context menu that opens, click Search.

The Search Owners dialog box opens. The search is set to the branch of the hierarchy that is currently selected in the Owners pane.

- To search the entire hierarchy of the Owners pane, on the Owners pane toolbar, click the Search Owners icon, and then in the Search Owners dialog box that opens, select Entire Tree.

Figure 3-4: Search Owners dialog box



2. Select the types of owners for which to search – Users, Computers, Groups, and/or Containers.



You must select at least owner type. Remember that in the Simplify Console, OUs and Containers are considered to be the same owner type.

3. Optionally, to limit the search to only those users that meet specific search criteria, enter a search filter in the Filters field.



*Your search is limited to the exact order of the characters in the string, but the search string is not case-sensitive and it can be found anywhere in the search results. For example, a search string of **monitor** returns the following owners: **MONITORIT**, Performance **Monitor** Users, and Simplify **Monitoring**.*

4. Click Search.

A list of all owners that meet all the search criteria is displayed in the Search Results pane of the dialog box.

5. Optionally, in the Search Results pane, select the an owner from the list of search results, and then click Select Owner.



You can also double-click a user in the list of search results.

The focus is changed to the Owners pane, and the owner is selected in the Owners pane. The display for the Assignments pane is updated accordingly with the objects and other configuration settings that have been assigned to or inherited by the owner. See [“The Assignments Pane” on page 37](#).

To add custom owners

In the Owners pane, right-click the Computers entry, and on the context menu that opens, click Add, and then click the appropriate option.

Option	Description
Group	<p>Adds an entry for a Group custom owner named NewGroup(n), which can contain one or more members. The new entry is automatically selected after it is added to the Owners pane.</p> <ol style="list-style-type: none">1. Click the New Group entry, and then name the group as appropriate.2. Right-click the named group entry, and on the context menu that opens, click Add, and then click the appropriate option (Group, Computer, IP Address, or IP Address Range). <p>Note: Groups can be nested.</p>

Option	Description
Computer	Adds an entry for a Computer custom owner named NewComputer(n) that is automatically selected after it is added to the Owners pane. Click the New Group entry, and then name the group as appropriate. Note: Wildcards are supported with named computer owners. Use a question mark (?) to specify a single character. Use an asterisk (*) to specify multiple characters.
IP Address	Opens the IP Address dialog box for specifying the IP address for the custom owner. Enter the IP address for the custom owner, and then click OK.
IP Address Range	Opens the IP Address Range dialog box for specifying the range of IP addresses for the custom owner. Enter the range of IP addresses for the custom owners, and then click OK.
Note: To rename a Group or Computer custom owner, or to specify a different IP address or range of IP addresses for a customer owner, right-click the owner in the Owners pane, and on the context menu that opens, click Rename.	

To delete custom owners



If you delete a custom owner, or you delete a custom owner group, then all the nested owners and groups and all their associated assignments are also deleted.

To delete a custom owner or a group of custom owners, right-click the customer owner, or the custom owner group, and on the context menu that opens, click Delete.

Managing Objects

As the Simplify Console administrator, your duties for managing objects include adding [objects](#) or [object groups](#), specifying configuration settings for objects, [deleting](#) objects and object groups, [disabling/enabling](#) objects, and auditing objects. When you add an object, you can add it as a new object, or you can [duplicate](#) an existing object, and then modify the duplicated object as necessary. You must manually save any new object or any changes that you make to an object for the object to be updated in the Simplify database.




For information about auditing objects, see [“Auditing the Simplify Database” on page 66](#).

To add a new object

You cannot add a new objects or object group to all branches in the Objects tree. The options to add a new object or object group are available only for the lowest level folders where it is appropriate to add a new object or object group. For example, you cannot add an object or object group at the Printers level or Native Drivers level in the Objects tree, but you can add a new object or object group at the Local Printers level. If you can add a new object or object group to a folder in the Objects tree, then when you right-click the folder, a context menu opens with two options: New Object and New Group. The (1) New Object icon and the (2) New Group icon are also displayed on the Objects pane toolbar.

Figure 3-5: Objects pane toolbar with options for adding a new object or new object group



1. Do one of the following:
 - Right-click the folder in the Objects tree to which the new object is to be added (Application, Print Server, and so on), and on the context menu that opens, click New Object.
 - Click the folder in the Objects tree to which the new object is to be added (Application, Print Server, and so on), and then on the Objects pane toolbar, click the New Object icon .




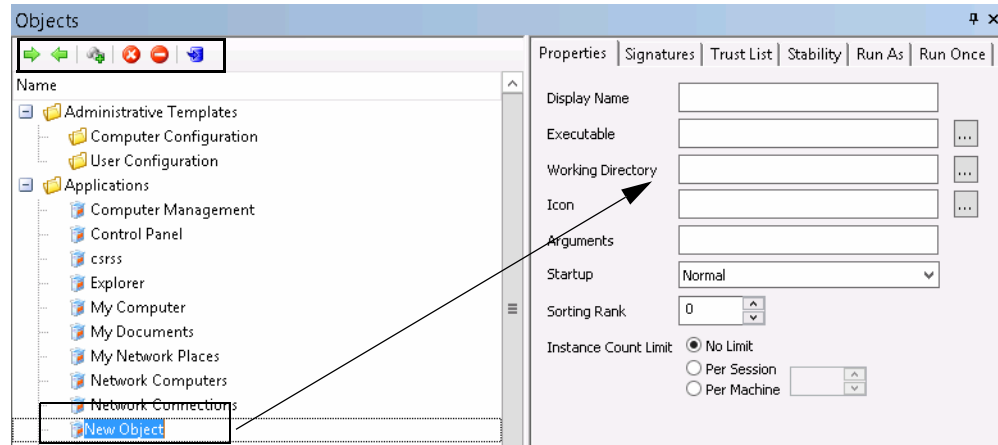
A placeholder named New Object is created in the Objects tree, and it is automatically selected. A tabbed form for specifying the object's configuration settings opens in the right sub-pane. The Objects pane toolbar is dynamically updated with icons, which from left to right are Delete Selected Item(s) , Disable Selected Item(s) , and Apply Changes . See [Figure 3-6 on page 53](#).

Figure 3-6: Objects pane with a placeholder for adding a new object and object form



2. Enter the name for the new object.



Object names are stored internally by an object ID. As a result, you can use the same object name as needed; however, to avoid confusion, Tricerat does not recommend that you do so. To rename an object, right-click the object in the Objects tree, and on the context menu that opens, click Rename.

3. In the object form, enter the configuration settings for the object.
4. On the Objects pane toolbar, click the Apply Changes icon.

To duplicate an object

You can duplicate an existing object, and then modify the name and configuration settings as needed to add a new object to the Objects tree.

1. Right-click the object that is to be duplicated, and on the context menu that opens, click Duplicate.

A placeholder named Copy (n) of (Object Name) is created in the Objects tree, and it is automatically selected. An object form for specifying the object's configuration settings opens in the right sub-pane. It is pre-populated with the configuration settings for the duplicated object.

2. Enter the name for the new object.



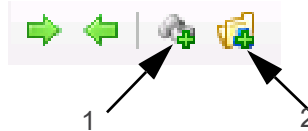
Object names are stored internally by an object ID. As a result, you can use the same object name as needed; however, to avoid confusion, Tricerat does not recommend that you do so. To rename an object, right-click the object in the Objects tree, and on the context menu that opens, click Rename.

3. In the object form, modify the configuration settings for the object.
4. On the Objects pane toolbar, click the Apply Changes icon.

To add a new object group

If you can add a new object or object group to a folder in the Objects tree, then when you right-click the folder, a context menu opens with two options: New Object and New Group. The (1) New Object icon and the (2) New Group icon are also displayed on the Objects pane toolbar.

Figure 3-7: Objects pane toolbar with options for adding a new object or new object group



1. Click the folder in the Objects tree to which the new object group is to be added, and then do one of the following:
 - Right-click the folder, and on the context menu that opens, click New Group.
 - On the Objects pane toolbar, click the New Group icon.

A placeholder named New Group is created in the Objects tree, and it is automatically selected.

2. Enter the name for the new object group.



To rename an object group, right-click the group folder in the Objects tree and on the context menu that opens, click Rename.

3. To add new objects to the group, do one or both of the following as appropriate:
 - Right-click the object group folder, and on the context menu that opens, click New Object, and then add the new object accordingly. See [“To add a new object group” on page 54](#).
 - Click and drag any object from its current location in the Objects tree to the new object group folder.

To delete an object or object group

You can delete one or more objects from the Objects tree. You can delete “standalone” objects, you can delete objects from an object group, or you can delete an entire object group. When you delete objects from the Objects tree, the objects are removed from the Simplify database and all assignments for the objects are also deleted. If an object must again be assigned to an owner or owners, then you must first add the object back to the Objects tree.

1. If you are deleting objects from an object group, expand the object groups folder to display the list of objects in it.

2. Do any of the following as needed:
 - To delete a single object, do one of the following:
 - In the Objects tree, right-click the object that is to be deleted, and on the context menu that opens, click Delete.
 - In the Objects tree, select the object that is to be deleted, and then on the Objects pane toolbar, click the Delete Selected Item(s) icon.
 - To delete multiple objects and/or object groups, do one of the following:
 - Press and hold the CTRL key, and in the Objects tree, select the objects and/or object groups that are to be deleted, and then right-click any selected object or object group and on the context menu that opens, click Delete.
 - Press and hold the CTRL key, and in the Objects tree, select the objects and/or object groups that are to be deleted, and then on the Objects pane toolbar, click the Delete Selected Item(s) icon.

A Simplify Console message opens, asking you to confirm that the selected items are to be deleted.
3. Click Yes.

The message closes. The objects are deleted and the Objects tree is dynamically updated. Any assignments for the objects are also deleted.

To disable an object

You can disable one or more objects in the Objects tree, and you can disable all objects in an object group in a single step. When you disable objects in the Objects tree, the objects are not removed from the Objects tree nor are any associated assignments deleted. The object is simply not effective/operational for any owner to which it is assigned. For example, if you need to take a printer down for maintenance, but you do not want to delete any associated assignments, then you can disable the printer object. Although the printer assignments remain intact, any affected owner will not be able to print from the printer. After the printer is repaired, you can enable the printer, and all the affected owners can then print from it again.

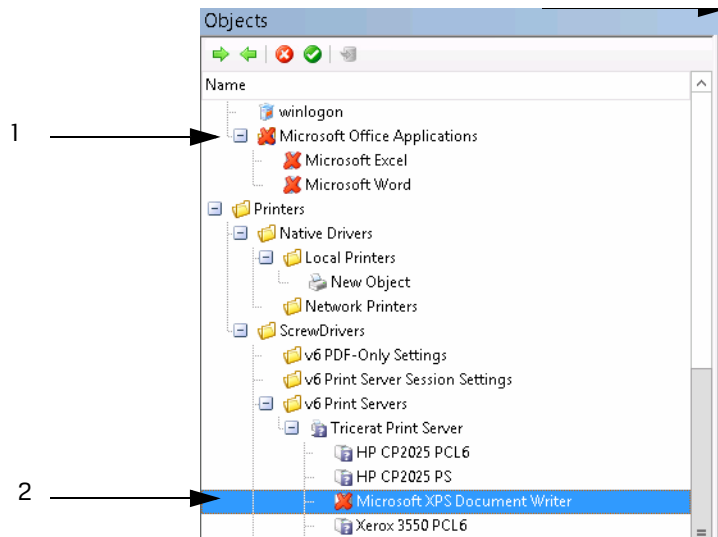
1. If you are disabling individual objects in an object group, expand the object groups folder to display the list of objects in it.
2. Do any of the following as needed:
 - To disable a single object or all the objects in a single object group, do one of the following:
 - In the Objects tree, right-click the object or object group that is to be disabled, and on the context menu that opens, click Disable.
 - In the Objects tree, select the object or object group that is to be disabled, and then on the Objects pane toolbar, click the Disable Selected Item(s) icon.
 - To disable multiple objects and/or object groups:
 - Press and hold the CTRL key, and in the Objects tree, select the objects and/or object groups that are to be disabled, and then right-click any selected object or

object group and on the context menu that opens, click Disable.

- Press and hold the CTRL key, and in the Objects tree, select the objects and/or object groups that are to be disabled, and then on the Objects pane toolbar, click the Disable Selected Item(s) icon.


A red “X” is displayed on the icon for any disabled object. If all the objects in an object group have been disabled at the group level, then a red “X” is displayed on the icon for the object group.

Figure 3-8: Disabled objects displayed in the Objects tree



Item	Description
1	All objects in the object group disabled at the group level.
2	Object individually disabled.

To enable an object

You can enable one or more objects in the Objects tree, and you can enable all objects in an object group in a single step. You can also individually enable in an objects group that was initially disabled at the objects group level. A red “X” is displayed on the icon for any disabled object. If all the objects in an object group have been disabled at the group level, then a red “X” is displayed on the icon for the object group. When you select a disabled object or object group in the Objects tree, an Enable Selected Item(s) icon  is displayed in place of a Disable Selected item(s) icon on the Objects pane toolbar.

1. If you are enabling individual objects in an object group, expand the object group folder to display the list of objects in it.

2. Do any of the following as needed:
 - To enable a single object or all the objects in a single object group, do one of the following:
 - In the Objects tree, right-click the object or object group that is to be enabled, and on the context menu that opens, click Enable.
 - In the Objects tree, select the object or object group that is to be enabled, and then on the Objects pane toolbar, click the Enable Selected Item(s) icon.
 - To enable multiple objects and/or object groups, do one of the following:
 - Press and hold the CTRL key, and in the Objects tree, select the objects and/or object groups that are to be enabled, and then right-click any selected object or object group and on the context menu that opens, click Enable.
 - Press and hold the CTRL key, and in the Objects tree, select the objects and/or object groups that are to be enabled, and then on the Objects pane toolbar, click the Enable Selected Item(s) icon.

The enabled objects remain selected. The red “X” is removed from the object icons. The Disable Selected Item(s) icon is displayed again on the Objects pane toolbar.

Managing Assignments

Assigning an object is the act of selecting an object or object group and associating the object or object group with a specific owner. To assign an object, you first select the owner in the Owners pane, then you select the object in the Objects pane, and then, finally, you drag the object to the appropriate branch in the Assignments pane.

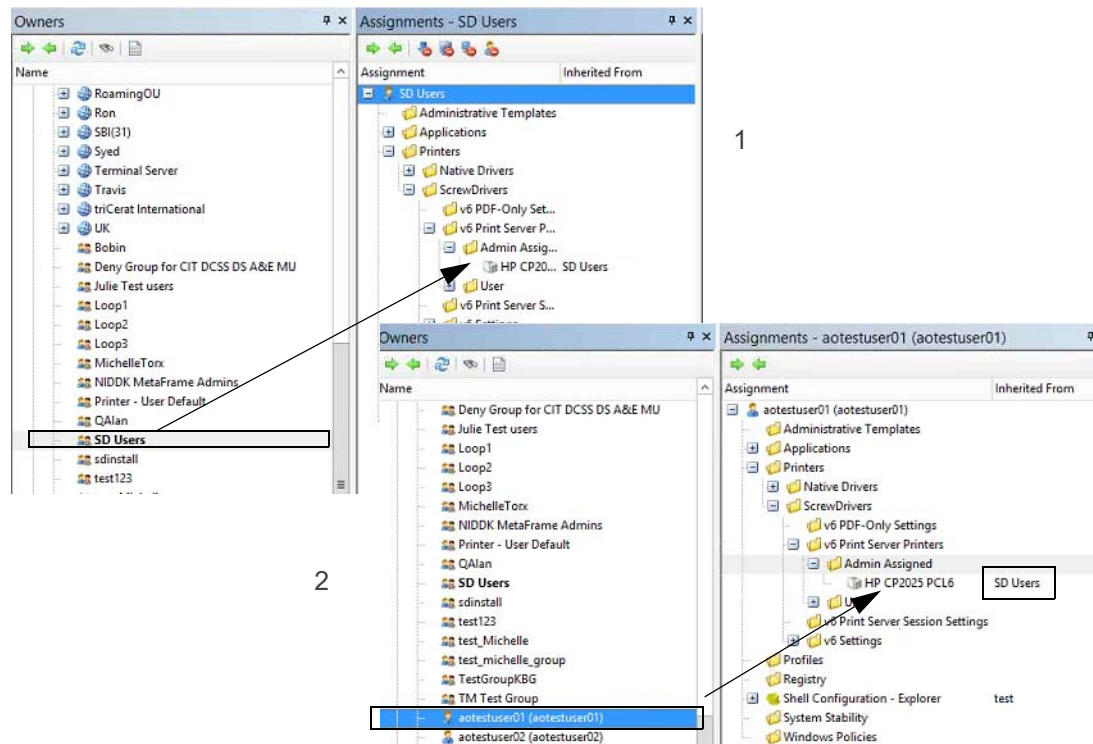


If a selected object/object group cannot be assigned to a branch of the Assignments pane, then as you drag the object over the branch, a Not Allowed icon is displayed.

Assignments are made in three primary locations and then merged into a single list in the Assignments pane:

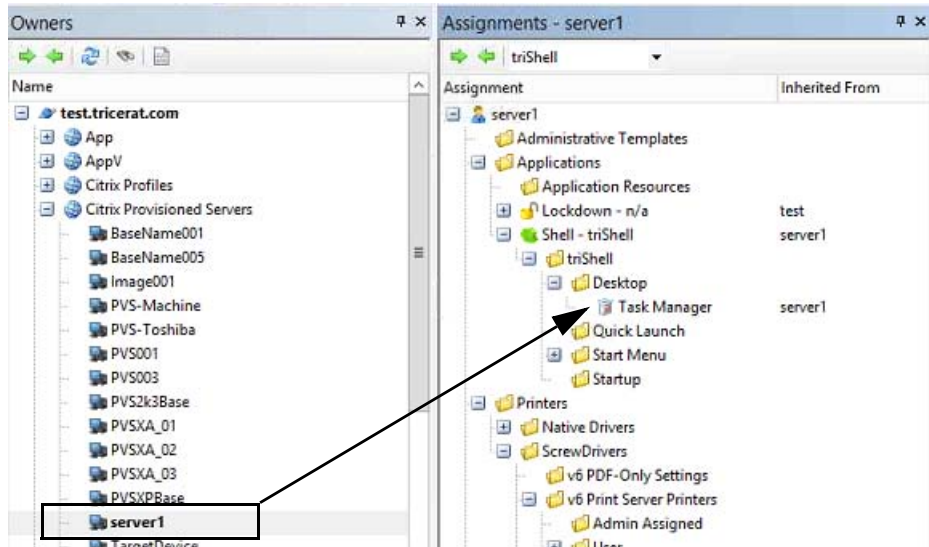
- The user assignments – Any object that is assigned directly to the user who is logging in, or any Group/Domain/OU of which the user is a member. For example, as shown in [Figure 3-9](#) below, (1) an HP printer is assigned directly to the SD Users group, and (2) any user who is a member of the SD Users group inherits the HP printer.

Figure 3-9: User assignment example



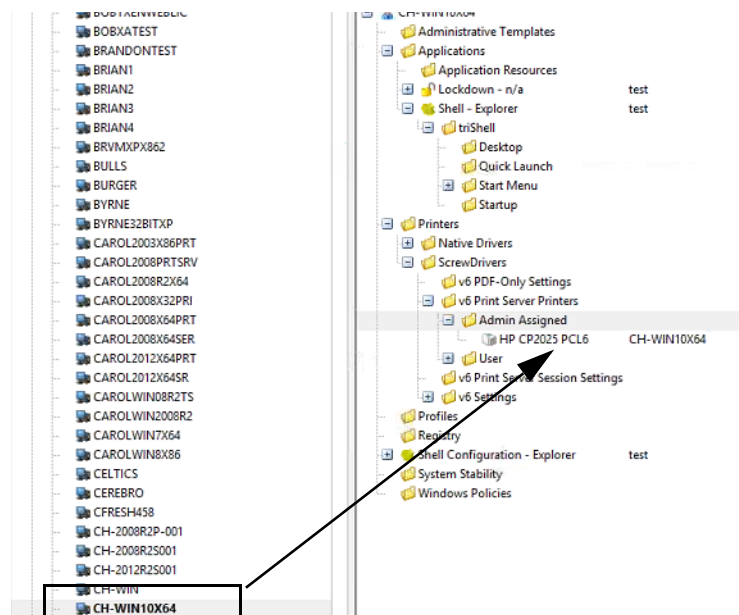
- The server assignments – Any object that is assigned directly to the server (Terminal Server or Virtual Desktop) or any Group/OU/IP range of which the server is a member. For example, in [Figure 3-10](#) below, the Task Manager application is assigned to the server at the Desktop level. This application is inherited on the desktop of any user who logs in to the server.

Figure 3-10: Server assignment example



- The client assignments – Any object that is assigned to the client in the Active Directory, a client name in Custom Owners, or to an IP address. For example, in [Figure 3-11](#) below, an HP printer is assigned to the client/workstation in the Computers container. Any user who log in to a Virtual Desktop/Terminal Server from the client inherits the printer.

Figure 3-11: Client assignment example



As the Simplify Console administrator, in addition to [making](#) direct assignments, your duties for managing assignments include [deleting](#) direct assignments, [denying](#) or [permitting](#) assignments, and [blocking](#) owners from receiving one or more assignment types.



Your management of assignments can be affected by two variables – the Shell type and/or Lockdown mode that has been assigned to the owner. For detailed information about assigning a Shell type to an owner, see the [Simplify Desktop User Guide](#). For detailed information about assigning a Lockdown mode to an owner, see the [Simplify Lockdown User Guide](#).

To make a direct assignment of an object/object groups to an owner

When you make a direct assignment of an object or object groups to an owner, the assignment is automatically saved to the Simplify database. No manual action to save the assignment is required. The only objects that you cannot directly assign to an owner are ScrewDrivers v6 Printer Server objects. You can assign only the nested printers. Also, neither ScrewDrivers v6 Print Server groups nor ScrewDrivers v6 Print Server Printer groups are allowed.



If Simplify Printing or Simplify Driver Management has been licensed, then an owner can have one or more different printers assigned to it, and you can set one of these printers as the owner's default printer. For detailed information about Simplify Printing or Simplify Driver Management, including the specifying of a default printer for an owner, see ["Simplify Printing" on page 77](#) or ["Simplify Driver Management" on page 202](#).


1. In the Owners pane, select the owner to which the objects or object groups are being assigned.
2. In the Objects pane, select the object or object group that is being assigned. Note the following:
 - To select multiple objects or object groups, press and hold the CTRL key as you make your selections.
 - To assign all the objects in the object group in a single step, select the top-level object group folder.
 - To assign only specific objects in an object group, expand the top-level object group folder, and then select the object or objects as appropriate.



You can multi-select only objects and groups. You cannot multi-select a group and one or more of its nested objects.

3. Drag the selected objects or object groups to the appropriate branch in the Assignments pane.



If a selected object/object group cannot be assigned to a branch of the Assignments pane, then as you drag the object over the branch, a Not Allowed icon  is displayed.

To delete a direct assignment of an object for an owner

You can delete only direct assignments and you can delete only one direct assignment of an object at a time.




Although you cannot delete an inherited assignment, you can deny it. See [“To block an owner from receiving an assignment” on page 63](#).

1. In the Owners pane, select the owner from which the object is being deleted.
2. Expand the Assignments tree as needed to find the object.



To view the location of an object in the Objects tree before you delete its assignment, right-click the object and on the context menu that opens, click [Select in Objects Tree](#).

3. Do one of the following:
 - Right-click the object and on the context menu that opens, click Delete Assignment.
 - Select the object, and on the Assignments pane toolbar, click the Delete Assignment icon .

A Delete Assignment dialog box opens, asking you to confirm the deletion of the selected object.

4. Click OK.

Depending on the object that is selected for deletion, for example, a printer versus an application, the Shell type that is assigned to the owner, and/or the Lockdown mode that is assigned to the owner, two results are possible:

- The Delete Assignment dialog box closes and the direct assignment is immediately deleted.
- A series of Deletion Confirmation messages opens, asking you to confirm other deletion actions. For example, if you are deleting an application such as Microsoft Word from a server, and Lockdown mode is enabled for the owner, you are asked if you also want to delete the application from the Trusted Applications list. Click Yes or No for each additional Deletion Confirmation message as appropriate. After you answer the last message in the series, the direct assignment is deleted from its initial location in the Assignments tree (the location that you selected for deletion), as well

as any other locations that you have specified.



For detailed information about assigning a Shell type to an owner, see the *Simplify Desktop User Guide*. For detailed information about assigning a Lockdown mode to an owner, see the *Simplify Lockdown User Guide*.

To deny an assignment of an object


You can delete or deny any direct assignment; however, if an owner has *inherited* an unnecessary or unwanted assignment, you cannot delete the assignment. Instead, you must deny the assignment. When you deny either a direct assignment or an inherited assignment, the denied state of the assignment is also inherited – if a parent owner is denied an assignment, then all its children are also denied the assignment.



Remember, a denied assignment of an object always overrides any Permitted assignment, so make sure that when you are denying an object, that you set the deny at the appropriate level in the Assignments tree.



You can deny only inherited assignment for one owner at a time using the following procedure. To deny all inherited assignments for an owner in a single step, see [“Advanced features for conflict resolution” on page 48](#).

1. In the Owners pane, select the owner for which the assignment is being denied.
2. Expand the Assignments tree as needed to find the object.
3. Do one of the following:
 - Right-click the object and on the context menu that opens, click Deny Assignment.
 - Select the object, and then on the Assignments pane toolbar, click the Deny Assignment icon .

The object is marked with a Denied icon in the Assignments tree and the Denied by <owner name> is displayed in the Inherited From column.

Figure 3-12: Example of a denied application object in the Assignments pane



Microsoft Excel	Denied by XEN-XP05
-----------------	--------------------

To permit an assignment of an object

You can always override the Denied status of an object and permit its assignment again. You can permit the assignment of an object at the parent owner level, which means that the assignment is also permitted for all the parent owner's children, or you can selectively permit the assignment of any child one at a time.



Remember, a Denied assignment of an object always overrides any Permitted assignment, so if you cannot enable the assignment for an object, check to see if the assignment is denied for its parent owner.

1. In the Owners pane, select the owner for which the assignment is being permitted.
2. Expand the Assignments tree as needed to find the object.
3. Do one of the following:
 - Right-click the object and on the context menu that opens, click Permit Assignment.
 - Select the object, and on the Assignments pane toolbar, click the Permit Assignment icon

The Denied icon is removed from the object in the Assignments tree. The name of the owner from which the object inherited its assignment is displayed in the Inherited From column.

To block an owner from receiving an assignment



The following settings are typically used only in advanced configurations. Contact support@tricerat.com for assistance.

In addition to normal assignment operations, several options are available to manipulate the final result of owner assignments, including specifying that an owner is to ignore entire categories of assignments. For example, if an administrator is to receive assignments based solely on user membership, then the administrator can instruct the domain level to ignore all server and client assignments. You can specify any of the following:

- Block all objects that are inherited from the tree above them.
 - Block server assignments.
 - Block client assignments.
 - Block user assignments.
1. In the Owners pane, select the appropriate owner.

2. At the top-level of the Assignments pane, right-click the owner name, and on the context menu that opens, select the appropriate option or options.

Option	Description
Block Inherited Assignments	Blocks all inherited assignments for the owner.
Block Server Assignments	Blocks all assignments that the owner inherits from the server that is being logged in to.
Block Client Assignments	Blocks all assignments that are made to client computers as well as all the computers that are defined in the Computers container.
Block User Assignments	Blocks all of the user's (owner's) direct assignments as well as all the user's inherited assignments.



A check mark is displayed in front of any option that is currently selected for the owner. To turn off an option, click the option again. The check mark is removed, indicating that the option is not currently selected for the owner.

Chapter 4

Data Review in the Simplify Console

Two primary functions are available in the Simplify Console for reviewing and analyzing the data in your Simplify database: audits and reports. Audits track all the changes that have been made to an entity in the Simplify database in a specified time period such as the create and update for an application object. Other Simplify Suite reports provide different information about your Simplify Suite installation, such as all the objects that are currently assigned by owner.

This chapter covers the following topics:

- [“Auditing the Simplify Database” on page 66.](#)
- [“Generating Simplify Suite Reports” on page 71.](#)

Auditing the Simplify Database

Audit is a management tool in the Simplify Console that tracks all the changes made to the Simplify database. Three options are available for auditing these changes:

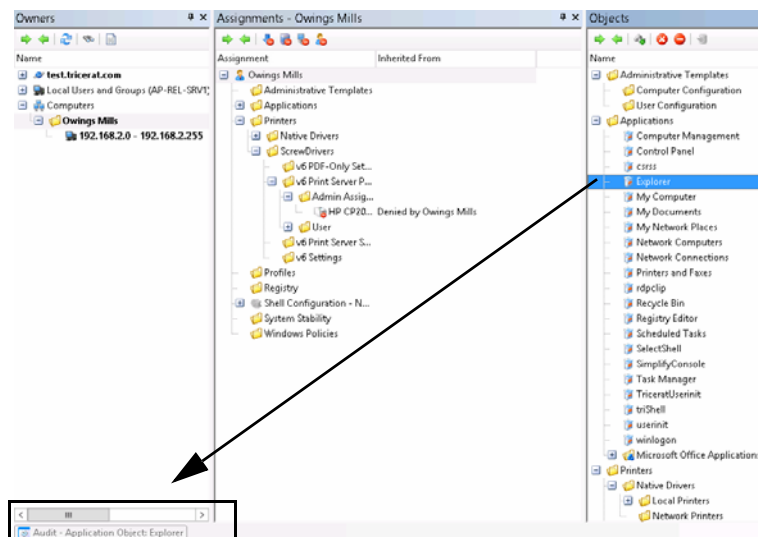
- **Audit Object** – This audit tracks the history of an object since its initial creation date.
- **Audit Owner** – This audit tracks the history of all the assignments ever made to an owner.
- **Searching Audit Data** – This option allows you to search for specific audit data based on user-specified search criteria such as Users, Actions, and so on.

To audit an object or owner object in the Simplify database

1. Do one of the following:
 - To audit an object, in the Objects pane, right-click the appropriate object, and on the context menu that opens, click Audit.
 - To audit an owner, in the Owners pane, right-click the appropriate owner, and on the context menu that opens, click Audit.

The audit results are contained in an Audit pane. By default, the pane is initially collapsed into a tab that is docked at the bottom left edge of the Simplify Console window.

Figure 4-1: Collapsed Object Audit tab



2. Click the Audit tab to open the Audit pane and review the data for the selected object or owner. See [“Audit pane” on page 67](#).



Remember, you can change the location of the Audit pane to better suit your working needs. See [“Customizing the Simplify Console Layout” on page 24](#).

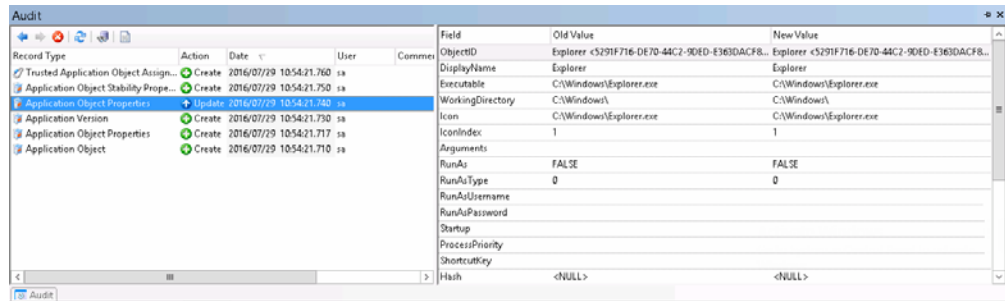


Every time you carry out an audit during a Simplify Console session, a new Audit tab does not open. Instead, the Audit tab is updated with the name of the entity that was most recently audited. You can use the options on the Audit toolbar to scroll through the all the audits that, by default, were carried out in the last 30 days for your Simplify Suite installation. See [“Audit pane toolbar”](#) below.

Audit pane

When you click an Audit tab to open the corresponding Audit pane, by default, it opens at the bottom of the Simplify Console window. An Audit pane is comprised of a [toolbar](#), and two [sub-panes](#): the History sub-pane and the Value sub-pane.

Figure 4-2: Audit tab







Audit pane toolbar

The Audit pane toolbar is located at the top of the History sub-pane (the left sub-pane).

Figure 4-3: Audit pane toolbar



Icon	Description
	Back icon – Scroll backwards through all the audits that, by default, were carried out in the last 30 days by any user for your Simplify Suite installation. As you scroll through backwards through the audits, the title bar of the Audit pane is updated accordingly. Note: To change the default time period for an audit, see “Specifying Simplify Suite Options” on page 30.
	Forward icon – Scroll backwards through all the audits that, by default, were carried out in the last 30 days by any user for your Simplify Suite installation. As you scroll through forward through the audits, the title bar of the Audit pane is updated accordingly. Note: To change the default time period for audits, see “Specifying Simplify Suite Options” on page 30.

Icon	Description
	Clear icon – Click this icon to clear all the records that are currently displayed in the Audit pane. Note: This action clears only the display of the Audit pane. It does not clear the Audit records from the Simplify database.
	Refresh Audit Data icon – Click this icon to update/refresh the display in the Audit pane.
	Search Audit Data icon — Click this icon to open the Search Audit Data dialog box. You use the options on the dialog box to search for audit records in the Simplify database, and then you can limit the database audit to a selected owner or object. See “To search for audit data” on page 69 .
	Generate Audit Report – TBD

Audit sub-panes

The History sub-pane is on the left, and by default, it displays the following information for all the actions carried out on the database record for the last 30 days sorted in reverse chronological order:

- The Record Type.
- The Action that was carried out for the object such as Create or Update.
- The Date that the action was carried out.
- The User who carried out the action.
- Any comments that the user entered for the action.




The Comment field is a free text field. You can double-click in this field to add a comment for the database record.

The Value sub-pane is on the right, and it displays the following information for the record that is currently selected in the History pane:

- The Field that contains the affected value.
- The Old Value (if applicable).
- The New Value.

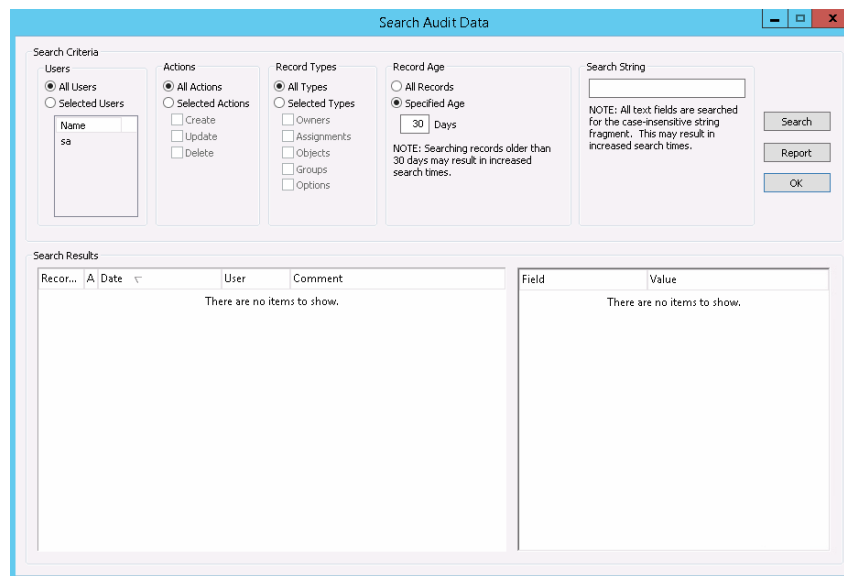
To change the sort order of the records in the History sub-pane, click any in column header. For example, to sort alphabetically by Action, click in the Action column. To sort in reverse alphabetical order by Action, click the Action column again.

To search for audit data

1. If you have not already done so, audit an object or owner. See [“To audit an object or owner object in the Simplify database” on page 66.](#)
2. On the Audit tab toolbar, click the Search Audit Data icon .

The Search Audit Data dialog box opens.

Figure 4-4: Search Audit Data dialog box



3. Specify your search criteria.
 - You can leave all values set to their default values, or you can modify them as needed.
 - If you limit the results by a search string, the search is not-case sensitive, and the search string can appear anywhere in the search results, but the search is limited to the exact order of the characters in the search string.



To view assignments that were made by different SQL accounts, search by User (and not by Owner). In larger environments, it might be suitable to create a separate SQL account (or granting db_owner to administrator accounts for the Simplify database) for tracking purpose.

4. Click Search.

All the database records that match the search results are displayed in the Search Results pane at the bottom of the Search Results dialog box.

5. Optionally, to audit a specific database entity, do the following:
 - a. In the Search Results pane, right-click the appropriate record type, and on the context menu that opens, click Audit, and then on the second context menu that opens, click the <Record Type>.

Figure 4-5: Auditing an Owner record type



A closed Audit tab is docked at the bottom of the Simplify Console window.

- b. Click the closed Audit tab to open the Audit pane and view and work with the audit data.

Generating Simplify Suite Reports

Different Simplify Suite reports provide different information about your Simplify Suite installation, such as all the objects that are currently assigned by owner. Currently, you can [generate](#) two Simplify Suite reports from the Simplify Console:

- Assigned Objects Owner report - Details all the objects that are assigned in your Simplify database that are assigned to owners. The report is organized by owner.
- Assigned Owners by Object report – Details all the owners in your Simplify database to which objects have been assigned. The report is organized by object.



Before you can generate any Simplify Suite report, a specific runtime version for Crystal Reports must be installed on the host computer. If this version is not installed, then after you click the Generate Report icon, a ReportViewer Warning dialog box opens, informing you of this, and providing a link to download the appropriate version of the installation files. You can also contact support@tricerat.com for assistance.

To generate a Simplify Suite report

On the Simplify Suite main menu, click Reports, and then select the appropriate report option: Assigned Objects by Owner or Assigned Owners by Object.

The selected report opens in a ReportViewer window. The toolbar at the top of the window contains options for working with the report such as searching for information in the report, printing the report, and so on. See [Figure 4-6](#) below and [Figure 4-7 on page 72](#).



You might have to click a ReportViewer icon  in the Windows taskbar to open and view the report after it is generated.

Figure 4-6: Assigned Objects by Owners report

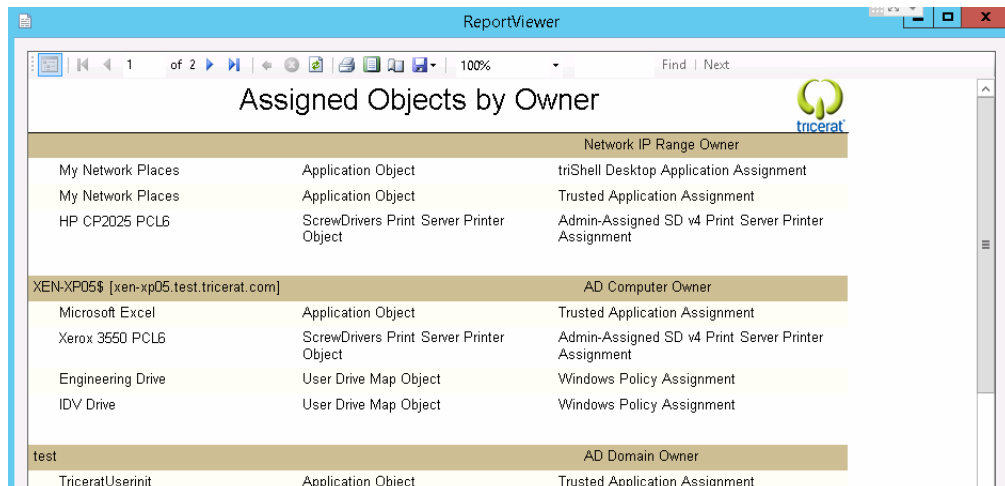


Figure 4-7: Assigned Owners by Object report

My Network Places		Application Object
	Network IP Range Owner	triShell Desktop Application Assignment
	Network IP Range Owner	Trusted Application Assignment
Microsoft Excel		Application Object
XEN-XP05\$ [xen-xp05.test.tricerat.com]	AD Computer Owner	Trusted Application Assignment
test	AD Domain Owner	Trusted Application Assignment
test	AD Domain Owner	triShell Desktop Application Assignment
VMHOST03\$ [vmhost03.test.tricerat.com]	AD Computer Owner	Application Resources Assignment
TriceratUserinit		Application Object
test	AD Domain Owner	Trusted Application Assignment
triShell		Application Object
test	AD Domain Owner	Trusted Application Assignment

Chapter 5

Simplify Console Tools

The Simplify Console has many tools that are designed for retrieving and manipulating the data that is relevant to the operation of the Simplify Suite, and for configuring the console and/or the Simplify Suite.

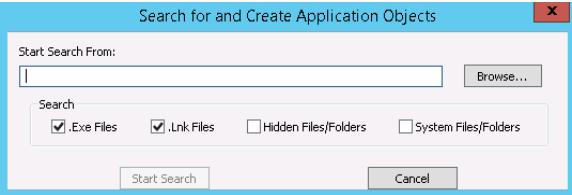
This chapter covers the following topics:

- [“The Simplify Console Tools Menu” on page 74.](#)
- [“The Manage Data Sources Tool” on page 76.](#)

The Simplify Console Tools Menu

To access the Tools menu, on the Simplify Console main menu, click Tools. The following options are found on the Tools menu:

Option	Description
External	<p>Opens a dropdown menu with options for the following external tools: RegDiff, Simplify Migration Utility, and AppChecker. The menu also contains a Customize Option, which opens the Customize External Tools dialog box. You use the options on this dialog box to customize any of these external tools to better suit your working needs. See:</p> <ul style="list-style-type: none"> • “The RegDiff Tool” on page 189. • “Simplify Migration Utility” on page 197. <p>Note: For assistance in using any of these external tools, contact support@tricerat.com.</p>
<p>Note: The following six options are used in Simplify Lockdown. For detailed information about Simplify Lockdown, see the <i>Simplify Lockdown User Guide</i>.</p>	
Configure Simplify Lockdown	<p>Opens the Simplify Lockdown Configuration dialog box in which you can set the service options for the Lockdown service, restart the service and/or purge the Simplify database tables related to Simplify Lockdown.</p>
Customize Lockdown Messages	<p>Opens the Customize Lockdown Messages dialog box. You use the options on this dialog box to customize the messages that a user receives while within a Simplify Suite session when an application is being locked down.</p>
Services	<p>Provides options for stopping, starting, or restarting the Simplify Printing service.</p> <p>Note: The Simplify Stability option is a legacy option and is no longer applicable for Simplify Suite.</p>
Import Learn Mode Apps	<p>Opens the Import Learn Mode Application dialog box. You use the options on this dialog box to import applications that are accessed by users who are in Learn Mode can be imported.</p>
Show Users in Learn Mode	<p>Opens a list of users for whom Learn Mode has been turned on.</p>
Show Denied Apps	<p>Opens a list of objects that have been added to the banned list.</p>

Option	Description
Find Apps to Import	<p>Opens the Search for and Create Application Objects dialog box. You use the options on this dialog box to search for applications that you want to import in to your Simplify Suite installation and create application objects for these imported applications.</p> <p><i>Figure 5-1: Search For and Create Application Objects dialog box</i></p> 
Options	See “Specifying Simplify Suite Options” on page 30.

The Manage Data Sources Tool

You use the Manage Data Sources tool to manage the following database connection properties:

- The connection properties for the Simplify Console. (View/Set Application Data Source).
- The connection properties for all the users that are connecting to the Simplify Suite server. (View/Set Simplify Data Source.)

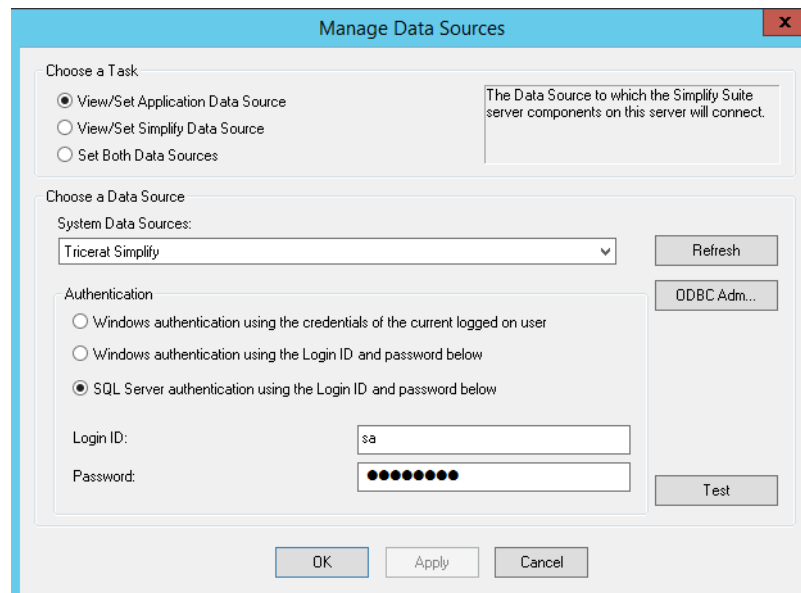


Typically, these values are the same for both data sources, but in the event that they must be different, you can contact support@tricerat.com for assistance.

You can also use the tool to manage the ODBC data source for Simplify Suite. If the connection to the Simplify Suite is incorrect, or if it changes, then you can use the options that are available from the Manage Data Sources tool to specify the ODBC DSN and the correct credentials for the Simplify Suite to connect to the Simplify database.

To open the Manage Data Sources tool, on the Simplify Console main menu, click File > Manage Data Sources.

Figure 5-2: Manage Data Sources dialog box



Generally, after the initial installation of the Simplify Suite and under normal operating conditions, you do not have to modify the data source values or administer the ODBC data source for Simplify Suite. For additional information about installing and configuring the Simplify Suite, see the Simplify Suite Installation Guide.

Section 2

Simplify Printing

Section Contents

- [Getting Started with Simplify Printing on page 78](#)
- [Managing Printer Objects in Simplify Printing on page 83](#)
- [Managing ScrewDrivers Objects and Settings on page 105](#)
- [ScrewDrivers Troubleshooting on page 110](#)



This section thoroughly details the management and use of Simplify Printing. For a high-level overview of the core components of Simplify Printing and the essentials for installing Simplify Printing and using it immediately, see the Simplify Printing Quick Start Guide.

Chapter 1

Getting Started with Simplify Printing

Simplify Printing is a print driver solution for Windows environments that uses Tricerat's ScrewDrivers technology and a Print Server plug-in to overcome remote printing limitations. This chapter provides information about using the Simplify Console for managing your Simplify Printing instance. It also provides a high-level overview of the ways that different clients can interact with Simplify Printing.

This chapter covers the following topics:

- [“Accessing Simplify Printing” on page 79.](#)
- [“Client Interactions with Simplify Printing” on page 80.](#)

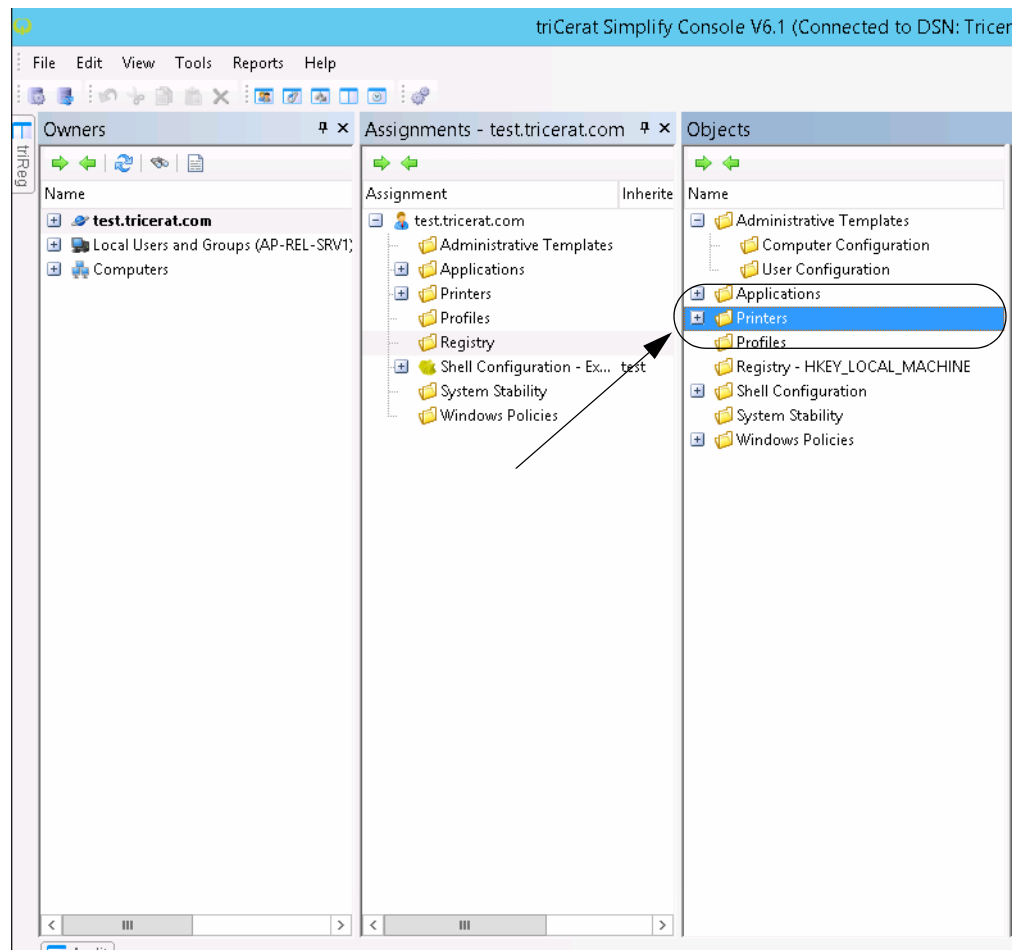
Accessing Simplify Printing

If your organization has licensed Simplify Printing, then after you log in to the Simplify Console, a Printers entry is displayed in the Objects pane.



For information about opening and logging in to the Simplify Console, see [“Simplify Console Overview” on page 18](#).

Figure 1-1: Printers entry in the Objects pane of the Simplify Console



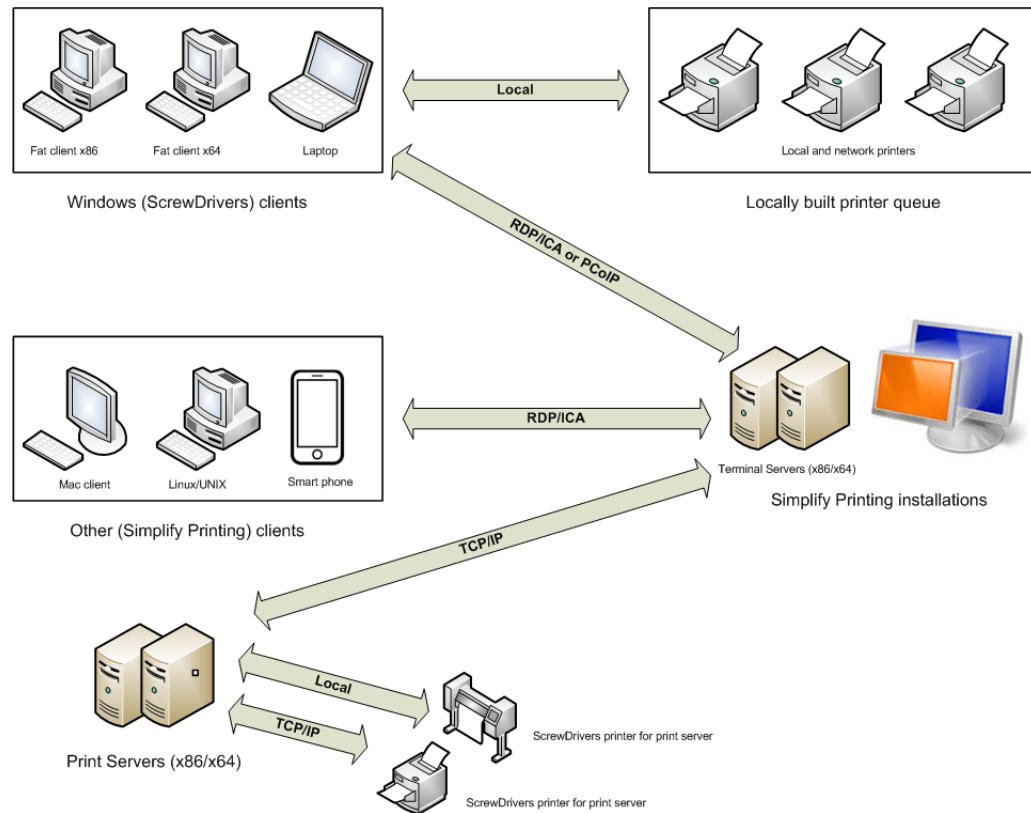
Client Interactions with Simplify Printing

Simplify Printing is a print driver solution for Windows environments that uses Tricerat's ScrewDrivers technology and a Print Server plug-in to overcome remote printing limitations. The ScrewDrivers component of Simplify Printing is the client-server solution for remote printing limitations. The ScrewDrivers client can be installed on any Windows client. The ScrewDrivers client queries the print drivers to make a list of all the features (color, DPI, paper sizes, and so on) that are available for all the printers that are local to the Windows client, and then passes these settings to the ScrewDrivers Server. The ScrewDrivers Server then uses the ScrewDrivers virtual driver to virtualize the drivers. The Print Server plug-in can communicate directly with any print server printer. This means that clients on which the ScrewDrivers client cannot be installed, such as a macOS client using RDP or a smartphone can still print in Citrix and Terminal servers, virtual desktops, and so on directly to print server printers. See ["Print Server Printing through Simplify Printing" on page 81](#).



For detailed information about ScrewDrivers, including its infrastructure and communication pathways, see the *ScrewDrivers's Administrator Guide*.

Figure 1-2: Client interactions with Simplify Printing

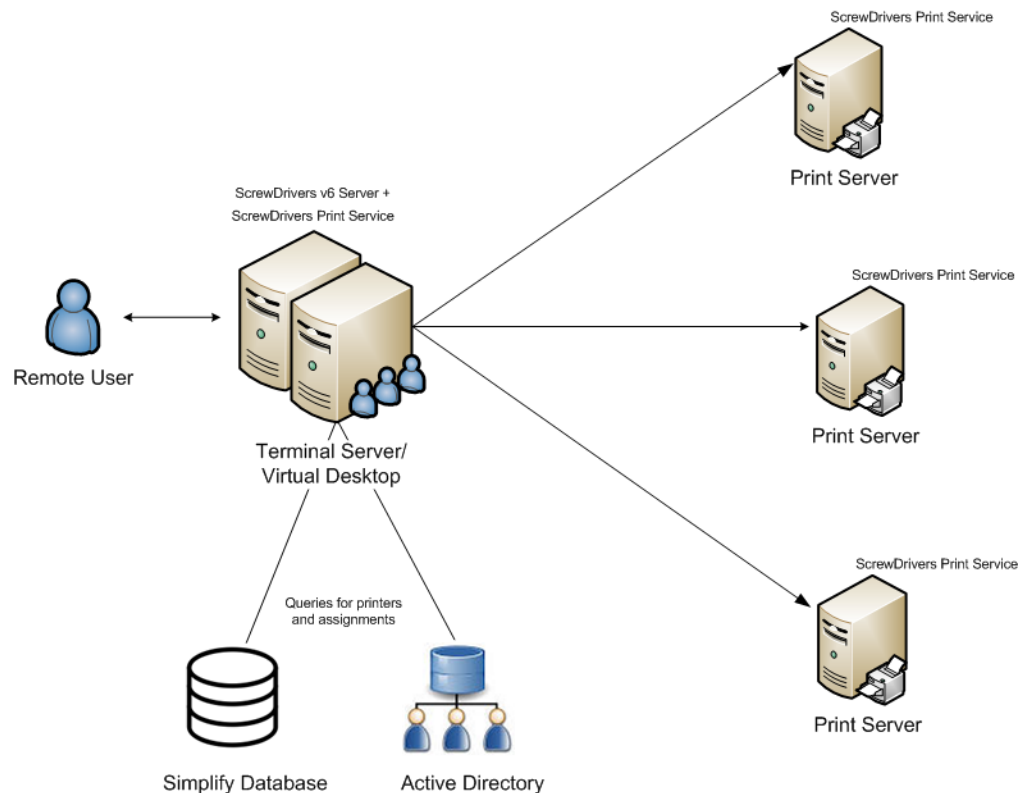


Print Server Printing through Simplify Printing

Because Simplify Printing can be installed on Windows fat clients, no print driver management is required on client PCs. Moreover, because ScrewDrivers supports any Windows-based driver, implementing Simplify Printing completely eliminates driver management on Terminal Servers, Virtual Desktops, and so on. This means that as the Simplify Suite administrator, you can consolidate the print drivers and spooling to your print servers, which is particularly applicable if the print server is across a WAN.

As shown in [Figure 1-3](#) below, in a typical Simplify Printing installation, there are two components to print server printing through Simplify Printing – the Simplify Printing server (Terminal Server, Virtual Desktop, and so on) and the print server. The Simplify Printing server acts as the ScrewDrivers Server. Using the functions that are available in the Simplify Console, you can specify which users and/or groups are to be able to print to specific printers from the print servers. The print server component acts as the ScrewDrivers client. The print server builds its local and network printers to the ScrewDrivers Server. Any print job that a user starts goes directly from the Citrix and Terminal servers, virtual desktops, and so on to the print server. As a result, no spooling occurs on a client's local machine and all print information is sent between the servers instead of the server and the client.

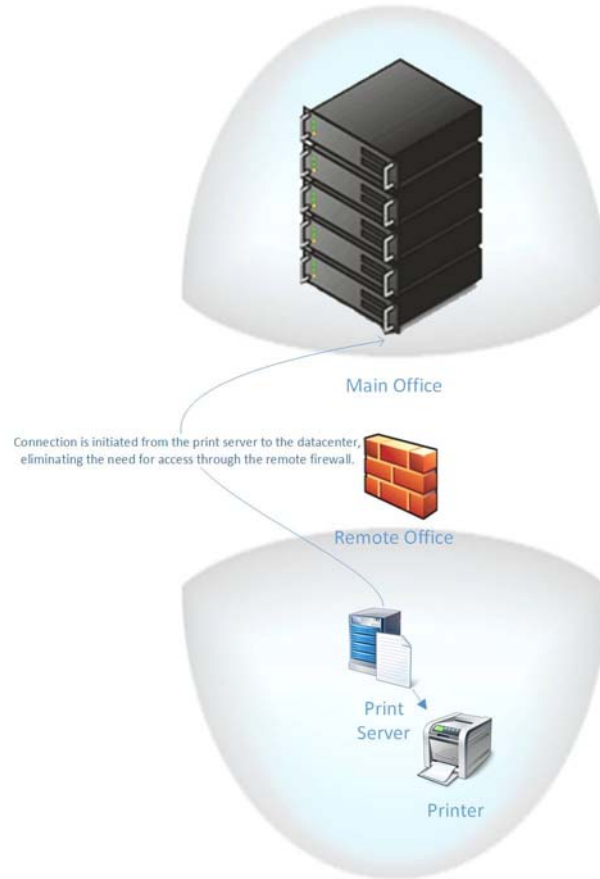
Figure 1-3: Print server printing through Simplify Printing without proxy



For some managed service provider (MSP) environments, however, a third component—a *Simplify Printing Print Server proxy feature*—might be required. As shown in [Figure 1-4 on page 82](#), this proxy feature reverses the direction of the initial communication between the

print server clients and the print server. This feature requires the installation of one additional component within the network where the ScrewDrivers-based queues print and one additional component for each remote network that these queues must access

Figure 1-4: Print server printing through Simplify Printing with proxy



Chapter 2

Managing Printer Objects in Simplify Printing

After you have set up your Simplify Printing environment (for example, consolidating the print drivers and spooling to your print servers), at a minimum, you must add, assign, and configure the necessary print server printers for your users. Depending on your Simplify Printing environment, you might also enable print server advanced print features, and/or assign specific printers to users.

This chapter covers the following topics:

- [“Managing Print Server Printers” on page 84.](#)
- [“Viewing Print Server Print Jobs” on page 100.](#)
- [“Setting Up a Failover Print Server” on page 102.](#)

Managing Print Server Printers

After you have set up your Simplify Printing environment (for example, consolidating the print drivers and spooling to your print servers), at a minimum, you must add, assign, and configure the necessary print server printers for your users. Adding and configuring print server printers consists of the following steps:

1. Adding the print server object and importing all the printers for the print server object. See [“To add the Simplify Print Server object and import the associated printers”](#) below.
2. Assigning the print server printers to the appropriate owners. See [“To assign the print server printers”](#) on page 90.
3. Configuring the assigned print server printers. See [“To configure the print server printers”](#) on page 93.

To add the Simplify Print Server object and import the associated printers

You must do the following procedure for *each* print server on which the Simplify Printing agent was installed.



The order of steps presented below for creating the Simplify Print Server object is not absolute. You can determine which order best suits your working needs. For example, you can name the Simplify Print Server object immediately after you create the object instead of after specifying the hostname for the object.



To review how to add objects in the Simplify Console, see [“Managing Objects”](#) on page 52.



When working in Simplify Printing, you might see the legacy term “ScrewDrivers” on various tabs, in lists, and so on. This term will be updated to the correct term “Simplify Print” in a future release.

1. In the Objects pane, under the ScrewDrivers > <Version Number> Print Servers folder, create a new object and give the object the name of your organization’s print server, for example, qa-srv005.

In the right sub-pane of the Objects pane, the Object Form for the new print server object is displayed. The General tab is the open tab. The Hostname or IP is set to 0.0.0.0 and the port is set to the default value of 3550. See [Figure 2-1 on page 85](#). [Table 2-1 on page 85](#) details the options that are available on the five tabs of the print server object form.

Figure 2-1: Simplify Console with new Print Server object entry, General tab

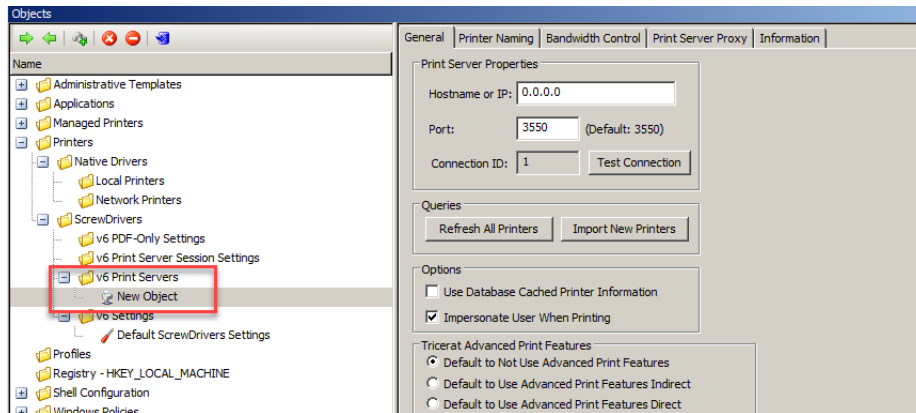


Table 2-1: Print Server Object form

Option	Description
General tab	
Print Server Properties	
Hostname or IP	The hostname or IP address of the print server.
Port	Indicates the port on which the print server listens. The default value is 3550 and you should change this value only if there is a conflict on the port.
Connection ID	A system-generated ID for the print server.
Test Connection	Click to confirm that the print server is available, and the configuration values for Hostname/IP and Port are correct.
Queries	
Refresh All Printers	Opens a connection to the print server and requests to refresh the entire list of printers that are currently installed on the print server. New printers that have been added since the last refresh are also added to the list. Note: This option is particularly applicable if changes have been made to the print server, such as driver updates, which must be re-queried for accurate printing.
Import New Printers	Opens a connection to the print server and requests to refresh the list of current printers with only the new printers that have been installed on the print server since the last refresh. Note: This option is faster than refreshing the entire list.
Options	
Use Database Cached Printer Information	Select this option to build your users' printers based on information that is cached in the Simplify database instead of querying the print server during login. Note: This option can improve performance, but if changes have taken place with the print server such as updating a print driver, then you must first refresh the list of printers before using this option.

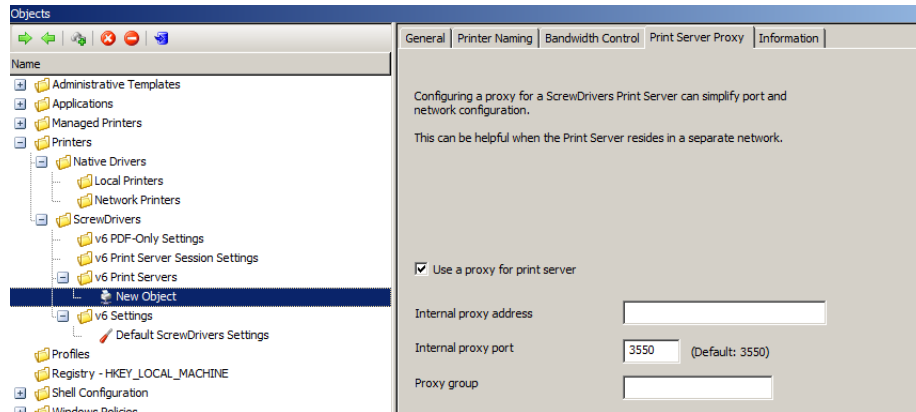
Table 2-1: *Print Server Object form (Continued)*

Option	Description
Impersonate User When Printing	Selected by default and Tricerat recommends that you leave this option selected. When a job is sent to the print spooler, the print job will show as being originated by the user instead of by the system.
Tricerat Advanced Print Features - You can enable/disable advanced printer features on a per printer basis, or at the global level (all printers assigned to a selected Simplify Print Server object. See "To enable/disable access to the advanced features for a print server printer" on page 97.	
Default to Not Use Advanced Print Features	Selected by default. Disables access to the advanced features for <i>all</i> the printers that are assigned to the Simplify Print Server object. For access to the advanced features for all the printers to the Simplify Print Server object, one of two options must be selected: <ul style="list-style-type: none"> • "Default to Use Advanced Features Indirect." • "Default to Use Advanced Features Direct."
Default to Use Advanced Features Indirect	Select this object to enable access to the advanced features for <i>all</i> the printers that are assigned to the Simplify Print Server object. When this option is selected, after a user clicks Preferences in the Print dialog box, the Printing Preferences dialog box opens with an Advanced Print Features tab. The user then must open the Advanced Print Features tab, and click Show UI to open the Manufacturer's Print dialog box for the selected printer. The dialog box displays the advanced features that the manufacturer supports for the printer.
Default to Use Advanced Features Direct	Select this object to enable access to the advanced features for <i>all</i> the printers that are assigned to the Simplify Print Server object. When this option is selected, after a user clicks Preferences in the Print dialog box, the Printing Preferences dialog box is bypassed and instead, the Manufacturer's Print dialog box for the selected printer opens immediately. The dialog box displays the advanced features that the manufacturer supports for the printer.
Disable All	Select this option to disable access to the advanced features for all the printers that are assigned to the Simplify Print Server object.
Printer Naming tab – Determines the format of the printer names that are to displayed to your users. You can set the printer naming scheme globally (the same print server naming scheme is applied to all the print server printers), or you can assign the naming scheme on a per printer basis. See "To set the printer naming scheme" on page 93.	
Bandwidth Control tab - If the Simplify Print Server object is connected over a congested network, then to limit the amount of print data that is sent per minute, you can configure the bandwidth for the server on this tab. Note that limiting bandwidth for the print server might reduce the printing throughput for the server.	
Print Server Proxy tab - If you are using a Tricerat Print Server proxy, then enter the internal proxy address and the proxy group name on this tab.	
Information tab – Read-only tab that displays information about the server on which the print server is hosted such as the OS version, the default language information, and so on.	

2. On the General tab, replace the default hostname with the actual name of the print server and if necessary, change the default port.

3. If you are not using a Tricerat Print Server proxy, then go to [Step 4](#); otherwise,
 - a. Open the Print Server Proxy tab.
 - b. Make sure that Use a proxy for print server is selected.
 - c. Enter the internal proxy address and the proxy group name.
 - d. Go to [Step 4](#).

Figure 2-2: Simplify Console with new Print Server object entry, Print Server Proxy tab



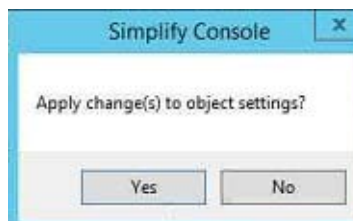
4. Enter the name for the new Print Server object.



Tricerat recommends that you use the print server hostname for the object name.

A Simplify Console message opens, asking you to confirm the changes made to the object's settings.

Figure 2-3: Simplify Console message



5. Click Yes to close the message.
6. Click Test Connection to verify the Simplify Print Server communication.

If the connection is successful, then a Simplify Console message opens, indicating this. See [Figure 2-4 on page 88](#).



If the connection is not successful, then a Simplify Console error message opens instead. Resolve the issues that resulted in the error, and repeat this step as needed until the Test Connection successful message is displayed.

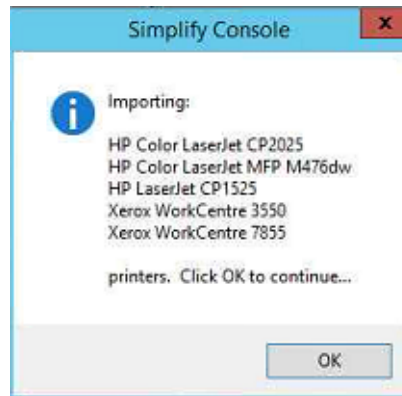
Figure 2-4: Simplify Console Test Connection successful message



7. Click OK to close the message.
8. Click Import New Printers.

A Simplify Console message that lists all the printers that will be imported for the Print Server object opens.

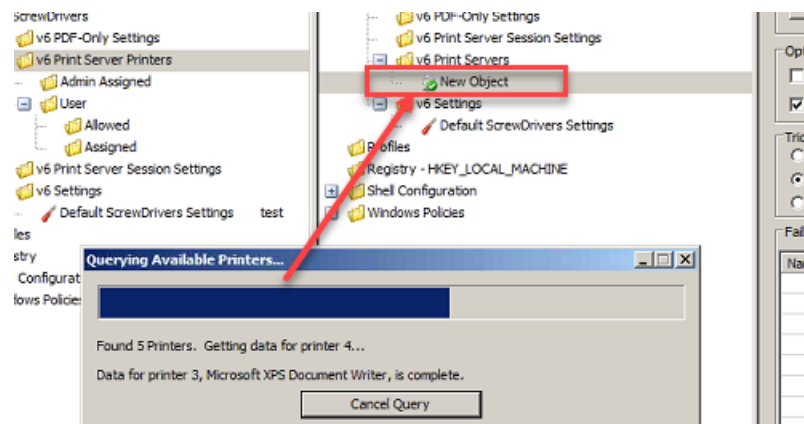
Figure 2-5: Simplify Console Import Printers message



9. Click OK to close the message and start the importing of the printers.

A Querying Printers message opens. The message displays the progress of gathering the data for each printer that is to be imported, and then importing the printer.

Figure 2-6: Querying Printers message





Be patient during the import process as it can take a while depending on the number of printers that are being imported. The Simplify Console is unavailable during this time. You must wait for the query to complete for the print server.

After all the data for all the printers is gathered, the Object pane is automatically populated with an entry for each imported printer. After a printer is successfully imported, you can click on the printer entry and configure its Advanced Print Features (APF) Settings, or to configure all the imported printers with the same APF settings, you can do so at the Simplify Print Server object level. See [Figure 2-7](#) and [Figure 2-8](#) below.

Figure 2-7: Imported printers with APF Settings

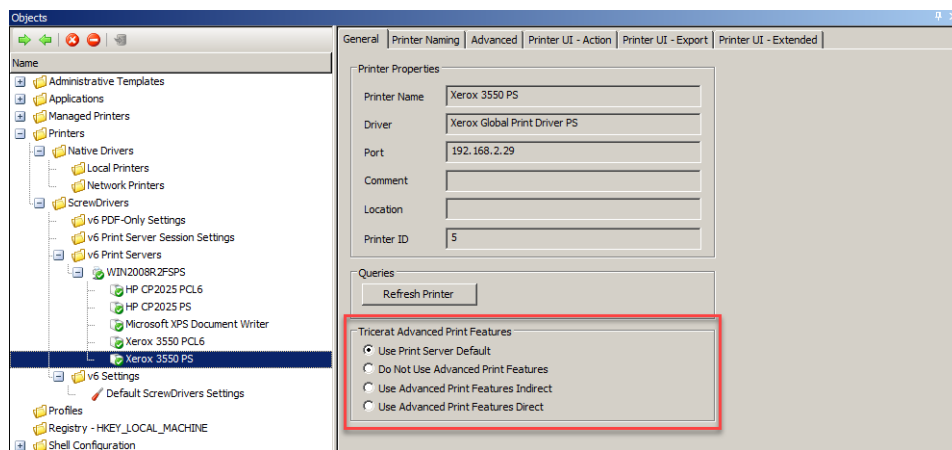
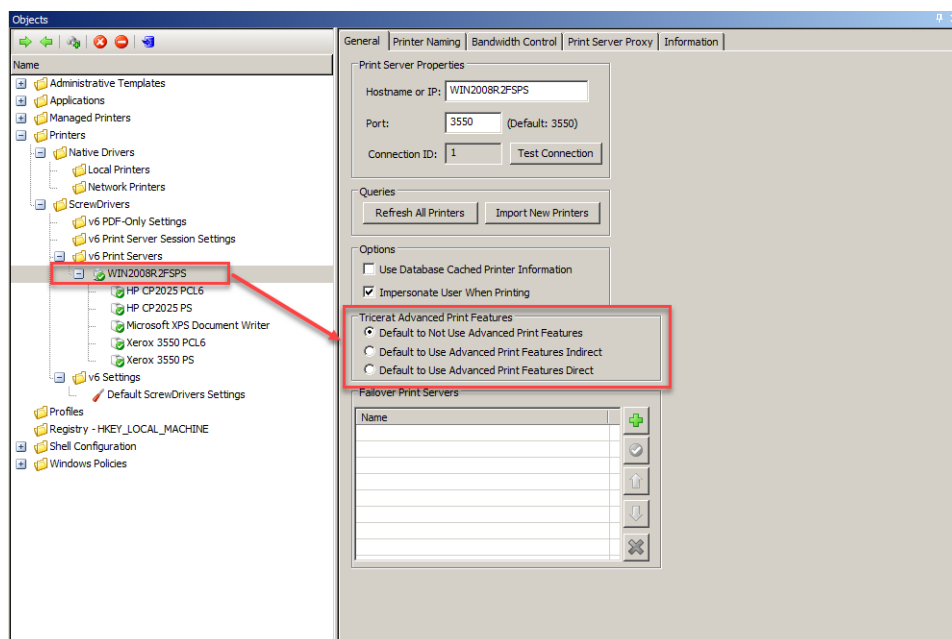


Figure 2-8: Imported printers with APF Settings at Print Server object level



10. Continue to [“To assign the print server printers”](#) on page 90.

To assign the print server printers

After you have added the print server object and imported the associated printers, the next step is to assign the print server printers to the correct owners. You can assign the printer server printers in one of two ways:

- You can directly assign the printer. See [“To directly assign a print server printer to an owner”](#) below.
- You can dynamically assign the printer. See [“To create an owner for a printer assignment \(Proximity Printing\)”](#) on page 92.

To directly assign a print server printer to an owner

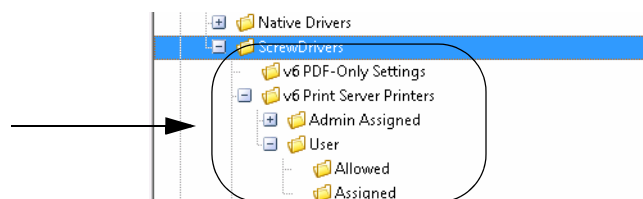
You can directly assign a print server printer to an owner in one of the three locations in the Assignments pane:

- **Admin Assigned** – Any print server printer that you assign to an owner as Admin Assigned is always built for the owner. The owner does not have the option of whether to build the printer, nor does the owner have the option of removing the printer from a Simplify Printing session. You should add print server printers to the Admin Assigned location to prevent an owner from being able to affect the building of specific printers. An owner always has the option of setting any Admin Assigned printer as the default printer for a session through the User Assigned Printers (UAP) application.
- **User Allowed** – If you assign a print server printer to an owner as User Allowed, then the owner can use the UAP application to add this printer to the list of printers that are to be built for the current Simplify Printing session. The owner can always delete and re-add the printer as needed.
- **User Assigned** – If you assign a print server printer to an owner as User Assigned, then this printer is automatically built during the owner’s Simplify Printing sessions. If the owner does not want the printer to be built during Simplify Printing sessions, then the owner can use the UAP application to delete the assignment. The printer is no longer built for the owner’s Simplify Printing sessions and the owner *cannot* add this printer back to the list of printers that are to be built for a session.



For detailed information about the UAP application, see the *Simplify User Assigned Printers Tool Quick Reference Guide*.

Figure 2-9: Assignment locations for a print server printer





You must repeat the following procedure in its entirety for each owner to which you are assigning Print Server printers.

1. In the Owners pane in Simplify Console, select the owner (user or group) to which you are assigning the Print Server printer.

The selected owner is displayed at the top of the Assignment hierarchy in the Assignments pane.



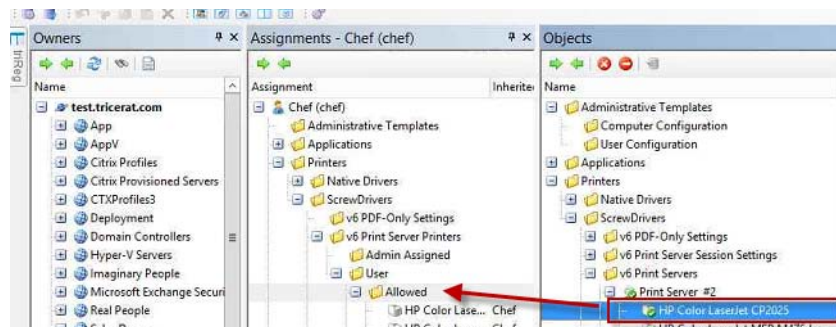
If the needed owner is not available in your Active Directory, then you can always create it. See [“To create an owner for a printer assignment \(Proximity Printing\)” on page 92.](#)

2. In the Assignments pane, do the following:
 - To show Admin Assigned, expand Printers > ScrewDrivers > <Version Number> Print Server Printers.
 - To show User Allowed and User Assigned, expand Printers > ScrewDrivers > <Version Number> Print Server Printers > User.
3. For each Print Server Printer that is to be assigned to the selected owner, do the following: From the Objects pane, drag the appropriate Print Server printer to one of the three assignment folders: Admin Assigned, User Allowed, or User Assigned.



If you assign any User Allowed printers to an owner, then either you or the owner must log in to the Simplify User Assigned Printers Tool and build the printers. See the [Simplify User Assigned Printers Tool Quick Reference Guide](#) for assistance.

Figure 2-10: Assigned Print Server Printers in Simplify Console

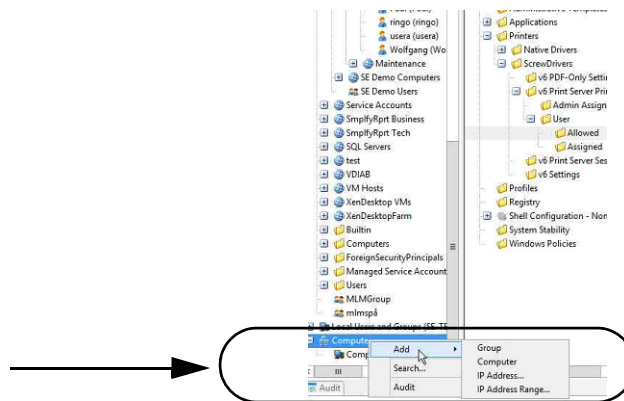


To create an owner for a printer assignment (Proximity Printing)

Simplify Printing provides the option of *proximity printing*, which allows for printers to be dynamically assigned to owners based on either the hostnames, IP addresses, or range of IP addresses for the clients that the owners are using to connect to Simplify Printing. This option is particularly useful if your organization has many locations and you want to create a group to organize the various hostnames and/or IP addresses. You can also organize the groups by something that better suits your working needs such as building, location, country, and so on, rather than directly referencing hostnames or IP addresses.

1. In the Owners pane, scroll to the Computers entry.

Figure 2-11: Computers entry in the Owners pane in the Simplify Console



2. Right-click the Computers entry, and on the context menu that opens, select Add, and then select one of the following options to create the owner:

Option	Description
Group	An organizational grouping of one or more groups, computers, IP addresses, and/or IP address ranges. After you name the group, you must add owners to the group. To add owners, right-click the group name, and on the context menu that opens, select one of the following as appropriate: <ul style="list-style-type: none"> • Add Computer (See “Computer” below.) • Add IP Address (See “IP Address” below.) • Add IP Address Range (See “IP Address Range” on page 93.) You can nest groups within other groups.
Computer	The complete device name for the client machine from which the owner is connecting to Simplify Printing, and not the fully qualified domain name. After you enter the device name, you can make assignments to the device in the same manner that you make assignments to a group, a user, and so on. You can use wildcard characters in the device name, including a question mark (?) to specify a single character and an asterisk (*) to specify multiple characters.
IP Address	The IP address for the client machine from which the owner is connecting to Simplify Printing. This is a single IP address.

Option	Description
IP Address Range	The range of IP addresses for the client machines from which the owners are connecting to Simplify Printing. This is the low IP address and the high IP address of the appropriate range.

3. Assign the print server printers accordingly, and then continue to [“To configure the print server printers”](#) below.



To review how to assign objects to an owner, see [“Managing Assignments” on page 58](#).

To configure the print server printers

After you have assigned the print server printers to their correct owners, then you must configure the print server printers. Configuring print server printers consists of [setting](#) the naming scheme for the printers, which determines how the printers are named on the server and also [specifying](#) which print server printer is to be the default printer for an owner. You can also [enable](#) or [disable](#) access to the advanced features for a print server printer. When you configure the naming scheme for the print server printers, you can set the naming scheme globally (the same print server naming scheme is applied to all printers on the print server, which is the default value), or you can set the naming scheme on a per printer basis. After you specify a particular printer to be the default printer for an owner, the owner can always override this assignment in the UAP application and select a different printer to be the default printer.



For detailed information about assignment locations for print server printers, see [“To assign the print server printers” on page 90](#).

To set the printer naming scheme

1. Do one of the following:
 - To configure a global naming scheme for your printer server printers, in the Objects pane, select the appropriate *print server*.
 - To configure the printer naming scheme on a per printer basis, in the Objects pane, select the appropriate print server *printer*.

The corresponding object form is displayed in the right sub-pane.

2. Click the Printer Naming tab to open it.

The tab displays all the options that are available for specifying the printer naming scheme. If the tab is opened for a print server printer, than an additional option, (1) Use Print Server’s Naming Scheme, is displayed at the top of the tab, and by default, it is selected. See [Figure 2-12 on page 94](#).

Figure 2-12: Print Server Printer Object Form, Printer Naming tab

1 → Use Print Server's Naming Scheme

Naming Scheme
Determines how printers are named on the server.

Printer Name (MACHINE:SESSION)
 MACHINE:SESSION (Printer Name)
 Printer Name (USER:SESSION)
 USER:SESSION (Printer Name)
 Custom: (cannot contain characters ! " \ | or ' , ;)

Printer () Machine () : Session ()

!!!! WARNING !!!!
Custom Names without SESSIONID are not supported. This is because a user could log in to multiple sessions and the printer names would conflict.

The naming scheme can also be changed to be similar to Simplify Printing v2's or v3's use of "[]" or "< >" instead of "()", but printer names will conflict if both products are installed.

Modifications

Limit Name Component Lengths:
Printer Name: 10 MACHINE: 10 USER: 10

For client's network printer name, replace " on " with: -

Example: Client Printer: \\MyServer\HP Printer
Typical Name: "HP Printer on MyServer"
New Name: "HP Printer - MyServer"

Replace Backslashes (\) in the printer name with: -

Replace Space () in the printer name with: -

3. Do one of the following:

- If you are configuring a global naming scheme for your print server printers, then configure the scheme on the Printer Naming tab on the *print server object* form. By default, the naming scheme is set to Printer Name (MACHINE:SESSION). Go to [Step 4](#).
- If you are configuring the printer naming scheme on a per printer basis, then for the print server printer, clear the option Use Print Server's Naming Scheme at the top of the Printer Naming tab, and then continue to configure the scheme on the tab. Go to [Step 4](#).



You can set a per printer naming scheme for every print server printer in your Simplify Suite environment, or for just selected printers. If you do not clear the option Use Print Server's Naming Scheme at the top of the Printer Naming tab for a print server printer, then the print server's naming scheme is used for the printer.

4. Do one of the following:
 - Select one of the four default schemes.
 - Printer Name (MACHINE:SESSION)
 - MACHINE:SESSION (Printer Name)
 - Printer name (USER:SESSION)
 - USER:SESSION (Printer Name)
 - To set up a custom printer naming scheme, select Custom.
5. Do one of the following:

Step	Action
If you are implementing a default naming scheme as-is.	N/A.
If you are implementing a default printer naming scheme, but you want to edit the scheme.	Do one or both of the following as appropriate: <ul style="list-style-type: none"> • Select “Limit name component lengths,” and then set the maximum value for any or all of the indicated components (Printer, Machine, and/or User.) The default value is ten. • Select which options in the printer name are to be replaced, and then leave a default replacement value as-is, or modify it as needed. For example, if you select “Replace backslashes (\) in the printer name with _,” then, by default, an underscore replaces every backslash in the printer name. You can leave the underscore as-is, or you change it to another value such as an asterisk (*).
If you are implementing a custom printer naming scheme.	Continue to “To define a custom printer naming scheme” on page 95.

To define a custom printer naming scheme

1. Set the format of the scheme using Session ID and one or more of the following: Printer, Machine Name, and User.

In addition to the Session ID, the name can have up to three components, but you can specify a single component (for example, Machine Name), two components (for example, Machine Name and Printer), or all three components (for example, Machine Name, Printer, and User).



Tricerat does not support a format without a Session ID. A user could log in to multiple sessions, which can result in a naming conflict.

2. Optionally, do any or all of the following as needed:
 - Select “Limit name component lengths,” and then set the maximum value for any or all of the indicated components (Printer, Machine, and/or User.) The default value is ten.

- Select which options in the printer name are to be replaced, and then leave a default replacement value as-is, or modify it as needed. For example, if you select “Replace backslashes (\) in the printer name with _”, then, by default, an underscore replaces every backslash in the printer name. You can leave the underscore as-is, or you change it to another value such as an asterisk (*).

To set a default printer for an owner

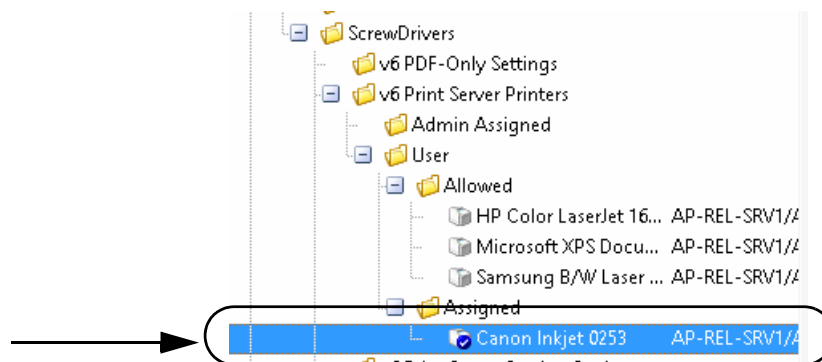
You can set a single Admin Assigned print server printer or a single User Assigned print server printer to be the default printer for an owner. (Because an owner always has the option of whether to build a User Allowed print server printer, you cannot specify any User Allowed print server printer to be the default printer.) After you set the default printer for an owner, the owner can always override this assignment in the UAP application and set a different printer as the default. To set a default printer for an owner, do the following:

1. In the Owners pane in Simplify Console, select the owner (user or group) for which you are setting the default printer.

The selected owner is displayed at the top of the Assignment hierarchy in the Assignments pane.
2. In the Assignments pane, do the following:
 - To show all Admin Assigned print server printers, expand Printers > ScrewDrivers > v6 Print Server Printers > Admin Assigned.
 - To show all User Assigned print server printers, expand Printers > ScrewDrivers > v6 Print Server Printers > User > Assigned.
3. Right-click any single Admin Assigned or User Assigned print server printer, and on the context menu that opens, click Set as Default.

The selected printer is marked with a blue checkmark in the Assignments pane.

Figure 2-13: Default print server printer set for an owner



To enable/disable access to the advanced features for a print server printer

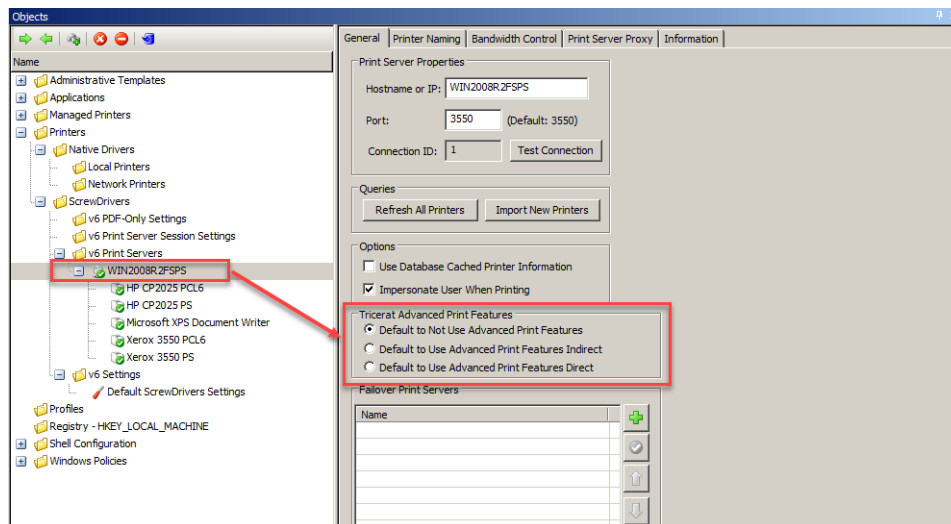
Simplify Printing supports advanced features that are uniquely defined by each printer manufacturer such as secure printing, stapling, and so on. This function is made possible by providing access for the user to the manufacturer's Print dialog box during the user's session while still using the ScrewDrivers virtual print driver on the Terminal Server, Virtual Desktop, or workstation. You can [enable](#) access to the advanced features at the global level, (the same level of access is applied to all printers on the print server), which is the default value, or you can [enable](#) access on a per printer basis.

To enable/disable access to the advanced features at the global level

1. In the Objects pane, select the appropriate print server object.

The object form for the print server is displayed in the right sub-pane. The General tab is the open tab.

Figure 2-14: Imported printers with APF Settings at Print Server object level



2. Under Tricerat Advanced Print Features, select the appropriate option:

Table 2-2: Tricerat Advanced Print Features, selected at the Simplify Print Server object level

Option	Description
Default to Not Use Advanced Print Features	Selected by default. Disables access to the advanced features for <i>all</i> the printers that are assigned to the Simplify Print Server object. For access to the advanced features for all the printers to the Simplify Print Server object, one of two options must be selected: <ul style="list-style-type: none"> • “Default to Use Advanced Features Indirect.” • “Default to Use Advanced Features Direct.”

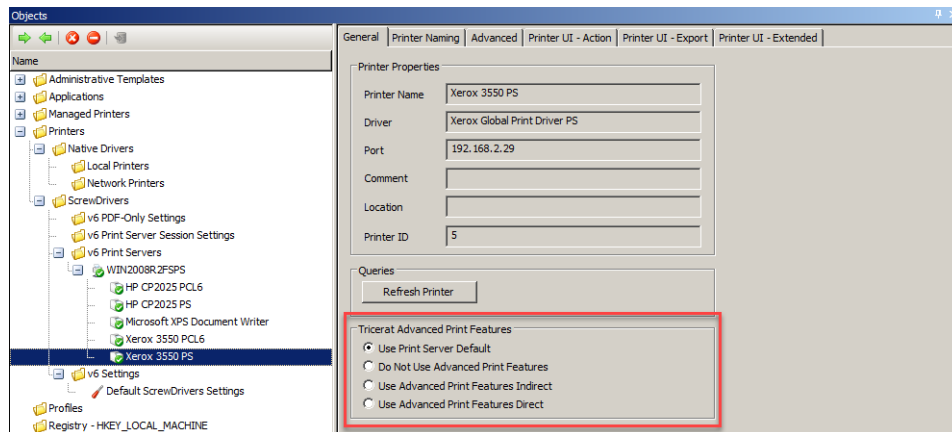
Table 2-2: *Tricerat Advanced Print Features, selected at the Simplify Print Server object level*

Option	Description
Default to Use Advanced Features Indirect	Select this object to enable access to the advanced features for <i>all</i> the printers that are assigned to the Simplify Print Server object, When this option is selected, after a user clicks Preferences in the Print dialog box, the Printing Preferences dialog box opens with an Advanced Print Features tab. The user then must open the Advanced Print Features tab, and click Show UI to open the Advanced Print Features dialog box for the selected printer. The dialog box displays the advanced features that the manufacturer supports for the printer.
Default to Use Advanced Features Direct	Select this object to enable access to the advanced features for <i>all</i> the printers that are assigned to the Simplify Print Server object, When this option is selected, after a user clicks Preferences in the Print dialog box, the Printing Preferences dialog box is bypassed and instead, the Advanced Print Features dialog box for the selected printer opens immediately. The dialog box displays the advanced features that the manufacturer supports for the printer.

To enable/disable access to the advanced printer features on a per printer basis

1. In the Objects pane, select the appropriate print server printer.

Figure 2-15: *Imported printers with APF Settings*



2. Under Tricerat Advanced Print Features, select the appropriate option:

Table 2-3: *Tricerat Advanced Print Features, selected at the Simplify Print Server object level*

Option	Description
Use Print Server Default	Access is determined by the AFP setting that has been specified for the Simplify Print Server object to which the printer is assigned.

Table 2-3: Tricerat Advanced Print Features, selected at the Simplify Print Server object level (Continued)

Option	Description
Do Not Use Advanced Print Features	<p>Select this option to disable access to the advanced features for the selected printer. For access to the advanced features for the printer, one of two options must be selected:</p> <ul style="list-style-type: none"> • “Default to Use Advanced Features Indirect.” • “Default to Use Advanced Features Direct.”
Default to Use Advanced Features Indirect	<p>Select this object to enable access to the advanced features for the selected printer. When this option is selected, after a user clicks Preferences in the Print dialog box, the Printing Preferences dialog box opens with an Advanced Print Features tab. The user then must open the Advanced Print Features tab, and click Show UI to open the Manufacturer’s Print dialog box for the selected printer. The dialog box displays the advanced features that the manufacturer supports for the printer.</p>
Default to Use Advanced Features Direct	<p>Select this object to enable access to the advanced features for the selected printer. When this option is selected, after a user clicks Preferences in the Print dialog box, the Printing Preferences dialog box is bypassed and instead, the Manufacturer’s Print dialog box for the selected printer opens immediately. The dialog box displays the advanced features that the manufacturer supports for the printer.</p>

Viewing Print Server Print Jobs

Information about a print job is automatically generated any time a print job is routed through a print server printer. If your Simplify Suite installation included Print Job Viewer, then you can [view](#) this information for any print job that any owner has sent to a print server printer in your Simplify Suite environment. For additional filtering capabilities, you can export this print job information to a comma-separated values (.csv) file.



To view print server jobs, the Print Server Reporting feature must be installed on at least one of your Simplify Printing print servers. For details about installing and configuring this feature, see the *Simplify Printing Quick Start Guide*.

To view print server print jobs

If your Simplify Suite installation included the Print Job Reporting, then a shortcut icon for the Print Job Reporting is placed on your desktop. An option for Print Job Reporting is also available from your Start menu.

1. Do one of the following to open Print Job Viewer:
 - Double-click the Print Job Viewer desktop icon.

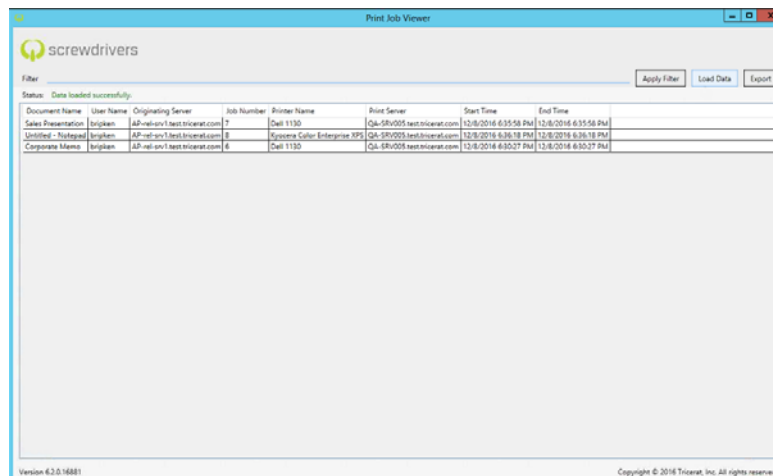
Figure 2-16: Print Job Viewer desktop shortcut



- Select the option from your Start menu (Start > All Programs > Tricerat > Print Job Viewer).
2. Click Load Data.

The Print Job Viewer is refreshed with the information for all the print jobs that all owners in your Simplify Suite environment have sent to any print server printer.

Figure 2-17: Print Job Viewer



3. Optionally, do any or all of the following as needed:
 - To sort the displayed print jobs by a specific characteristic, for example, the Document Name, click the appropriate column header.
 - To filter the data to only specific print server print jobs, enter standard search syntax for Microsoft SQL Server in the Filter field, and then click Apply Filter.



For information about standard search syntax for Microsoft SQL Server, see [https://msdn.microsoft.com/en-us/library system.data.datacolumn.expression\(v=vs.110\).aspx](https://msdn.microsoft.com/en-us/library/system.data.datacolumn.expression(v=vs.110).aspx).

- To export the data to a comma-separated values (.csv) file, click Export. By default, the file is named Print Job Report, and it is saved in your My Documents directory, but you can change one or both of these values. If you want to filter by other means, including a Pivot table, you can now export this file to a third-party spreadsheet application such as Microsoft Excel.

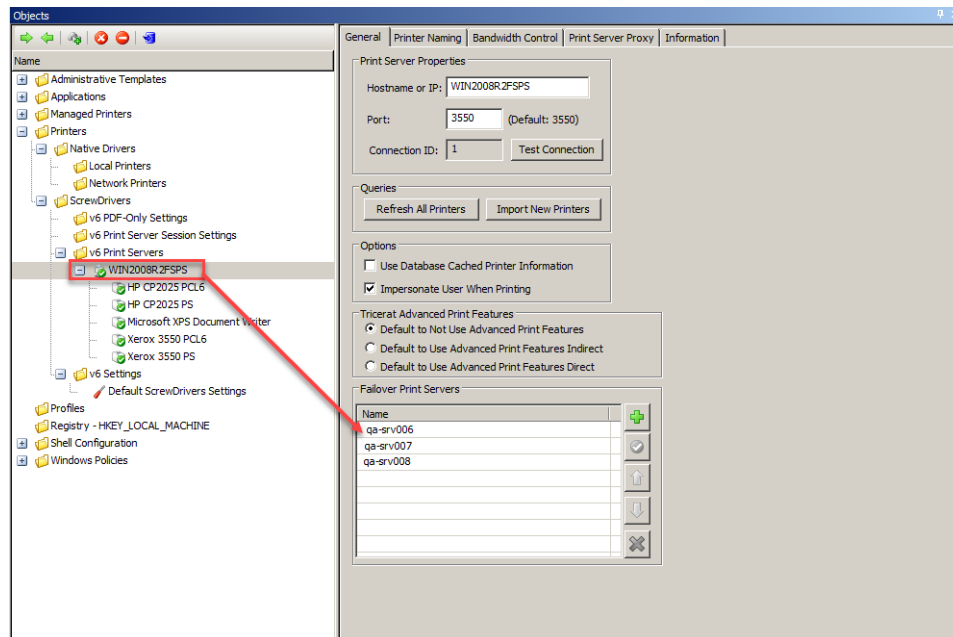
Setting Up a Failover Print Server

The Simplify Console provides an option for you to [set up](#) a failover print server for any of your primary print servers. The failover printer server is a true failover server - it is not a load balancer. To set up a failover print server, you must first set up at least two *identical* print servers, for example, qa-srv005. and qa-srv006. These multiple identical print servers must have the same print queues, the same queue names, the same print drivers, and so on. One of these identical print servers is designated as the primary print server for your users, for example, qa-srv005. You would then assign the printers for qa-srv005 to your users and you would assign qa-srv006 to the list of available Failover Print Servers. As a result, if there is any failure to communicate with any printer that is assigned to qa-srv005, then the list of available Failover Print Servers is queried in the order that the print servers are displayed until one of the following happens:

- A failover print server is queried successfully and the print job is completed from this print server.
- No failover print servers are queried successfully (the list of available print servers is failed all the way through) and the print job is not completed.

For example, as shown in [Figure 2-18](#) below, if there is any failure to communicate with any printer that is assigned to qa-srv005, then the list of available Failover Print Servers is queried in the order that the print servers are displayed (qa-srv006, qa-srv007, and then qa-srv008) until a print job can be completed successfully from any of these failover print servers or the job is failed all the way through.

Figure 2-18: Failover Print Servers



To set up a failover print server

1. Add, assign, and configure the necessary primary print server printers for your users.
See [“Managing Print Server Printers” on page 84.](#)

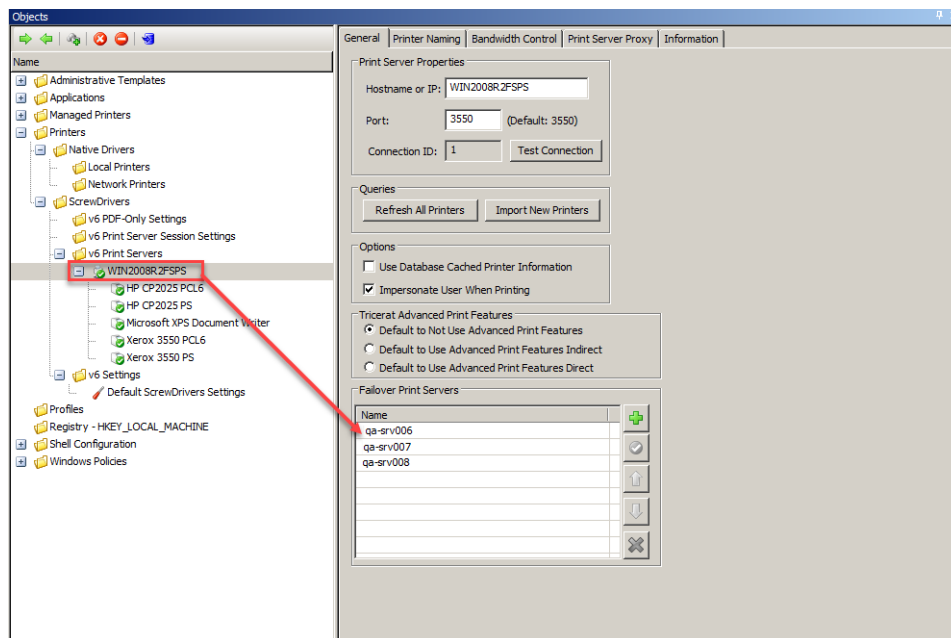


The failover print servers must have the same print queues, the same queue names, the same print drivers, and so on as the primary print servers.

2. In the Objects pane, select the primary print server object.

The object form for the print server object is displayed in the right sub-pane. The General tab is the open tab.

Figure 2-19: Failover Print Servers

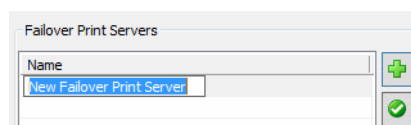



3. For each failover print server printer that is to be assigned to the selected primary print server, do the following:

- a. In the Failover Print Servers pane, click the Add Print Server icon

The entry “New Failover Print Server” is displayed in the Failover Print Servers list, and it is automatically highlighted.

Figure 2-20: New Failover Print Server entry



- b. Click in the highlighted entry, and then enter the name for the failover print server.
- c. With the newly added failover print server still selected in the Failover Print Servers list, click the Connect Print Server icon .

A Simplify Console message opens, indicating that the connection to the failover print server was successful.

Figure 2-21: Connection Successful message



- d. Click OK.

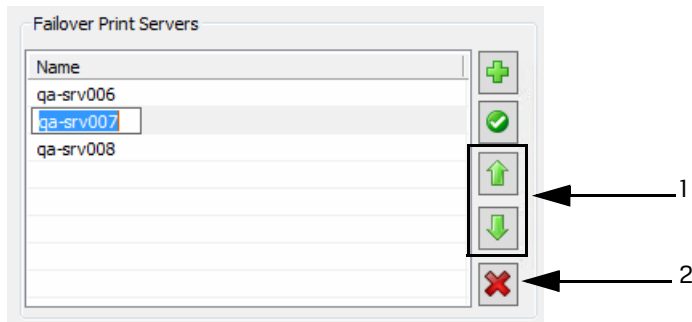
The message closes and the failover print server is now connected and active for the selected primary print server.

After you add one or more failover print servers, additional icons are enabled for the Failover Print Servers list. You use the Up and Down icons to change the order of the failover print servers in the list, and therefore, the order in which the servers are queried after the failure of the primary print server. You use the Delete icon to delete a selected failover print server.



If you delete a failover print server, the print server is removed immediately from the network. Any jobs that were in progress before the print server was deleted are completed. Any jobs that were still in a printer's queue at the time the print server was deleted cannot be completed.

Figure 2-22: Failover Print Servers list with enabled icons



Item	Description
1	Use to rearrange the order of the failover print servers in the list, and therefore, the order in which the servers are queried after the failure of the primary print server.
2	Delete a selected failover print server.

Chapter 3

Managing ScrewDrivers Objects and Settings

You can assign ScrewDrivers-specific configuration settings to an owner in the Simplify Console. <Version Number> PDF-Only Settings, for example, v6 PDF-Only Settings, are configuration settings for printer objects that support PDF generation. When you assign PDF-Only Settings to an owner, a printer that uses the ScrewDrivers PDF print driver is automatically generated. The owner can then create and print PDFs from any application that supports PDF generation. Default ScrewDrivers configuration settings contain printer creation options that determine the client printers that are built on the Simplify Suite server when a user logs in. Extended settings options that allow for further customizations of your users printing environments, such as specifying the default printer and when to delete printers from sessions, are also available. This chapter details the ScrewDrivers configuration settings that are available for assignment in the Simplify Console.

This chapter covers the following topics:

- [“Assigning PDF-Only Settings to an Owner” on page 106.](#)
- [“Assigning Default ScrewDrivers Settings to an Owner” on page 108.](#)

Assigning PDF-Only Settings to an Owner

PDF stands for Portable Document Format, which is a lightweight universal document exchange format. Almost all modern operating systems support PDF viewing and printing, including, but not limited to, Windows, Mac, Linux, and UNIX. PDF-Only Settings are configuration settings for printer objects that support PDF generation. When you [assign](#) PDF-Only Settings to an owner, a printer that uses the ScrewDrivers PDF print driver is automatically generated. The owner can then create and print PDFs from any application that supports PDF generation. After you assign a PDF printer to an owner, optionally, you can configure the settings for exporting the PDF file to the server. If you select a setting for configuration, then you must specify the category for the setting:

- Deny - Prevents the owner from enabling the administrator-denied setting and changing the default value for the setting. The function is completely prohibited during the printing process.
- Force - Prevents the user from changing the administrator-defined value for the setting. If a setting is selected and set to Force, then the associated function is completely automated during the printing process.
- Suggest - As the Simplify Suite administrator, you can define a default value for the setting, but an owner can always override this value at the time of printing. If the owner leaves the default value as-is for a setting, then the associated function is completely automated during the printing process; otherwise, if the owner decides to override the default value for a suggested setting, then the owner must do so by accessing the Printing Preferences dialog box for the printer during the session.

You can leave the printer naming scheme for a PDF printer set to the default value of Printer Name (MACHINE:SESSION), or optionally, you can modify the scheme.

To assign and configure PDF-only settings to an owner

1. In the Objects pane, under ScrewDrivers > <Version Number> PDF-Only Settings, create a new PDF printer object.

The printer object form is displayed in the right sub-pane. The General tab is the open tab.



To review how to add objects in the Simplify Console, see [“Managing Objects” on page 52](#).

Figure 3-1: PDF printer object form

Category	Setting	Value	Mode	Path	Op
Export PDF file to server	Save Mode:	Deny	Display Save Dialog		Overwrite
	Destination:	Deny			
	If File Exists:	Deny			

2. In the Owners pane in Simplify Console, select the owner (user or group) to which you are assigning the settings.

The selected owner is displayed at the top of the Assignment hierarchy in the Assignments pane.

3. Assign the PDF printer object to the selected owner.



To review how to assign objects to an owner, see [“Managing Assignments” on page 58](#).

4. Optionally, on the General tab of the PDF printer object form, select the printer settings that you want to configure, and specify Deny, Force, or Suggest as appropriate. If you specify Force or Suggest for a setting, then you must also provide a default value for the setting.



If you do not select any settings for configuration, then the Save dialog box opens for setting the printing preferences.

Setting	Description
Save Mode	Select one of two allowed values: <ul style="list-style-type: none"> • Display Save Dialog – Select this value if the owner is save the PDF to an owner-specified location. • Use Input Pathname — Select this value if the owner is to save the PDF to a pre-defined location.
Destination	If Save Mode is set to Use Input Pathname, then you must specify the pre-defined location here. Tip: Click Help to open a dialog box that displays the variables that, in addition to Windows variables, are supported in a path name.
If File Exists	If Save Mode is set to Use Input Pathname and the pre-defined location exists, then select one of four allowed values: <ul style="list-style-type: none"> • Overwrite: Automatically overwrite the existing file on the Print Server with the new file. • Prompt: Prompt the user to overwrite the existing file on the Print Server, or take other actions. • Cancel: Cancel the saving of the file. The existing file on the Print Server remains unchanged and no new file is saved. • Append: Add the new file to the end of the existing file on the Print Server. A single file is produced that contains both the existing (old) content and the new content.

5. Leave the printer naming scheme set to the default value of Printer Name (MACHINE:SESSION), or optionally, modify the printer naming scheme. See [Step 4 of “To set the printer naming scheme” on page 93](#).

Assigning Default ScrewDrivers Settings to an Owner

You [configure](#) the Default ScrewDrivers Settings on the General tab of the object form. The default settings include printer creation options that determine the client printers that are built on the Simplify Suite server when a user logs in as well as extended settings options that allow for further customizing of your users' printing environments, such as specifying the default printer and when to delete printers from sessions.

To assign and configure the default ScrewDrivers settings

1. In the Objects pane, under ScrewDrivers > <Version Number> Settings (for example, v6 Settings), select Default ScrewDrivers Settings.

The the Default ScrewDrivers Settings object form is displayed in the right sub-pane. The General tab is the open tab.

Figure 3-2: Default ScrewDrivers Settings object form, General tab

2. Configure the Default ScrewDrivers Settings.

Option	Description
Printer Creation - Determine which of the user's printers are built on the Simplify Suite server after the user logs in. You can select only one Printer Creation option at a time.	
Do not add any client printers	If enabled, none of the client's printers are added to the Simplify Suite server after a user logs in. Note: You typically enable this option only when Tricerat Support instructs you to do so.
Add all client printers	If enabled, all the client's printers are added to the Simplify Suite server after a user logs in.
Add only the client's default printer	Selected by default. If enabled, only the client's default printer is added to the Simplify Suite server after a user logs in.

Option	Description
Add clients first <u>0</u> printers Always add client's default	Change the default value of 2 as needed. The first "n" number of printers that are displayed in the list of available printers for the ScrewDrivers client are then added to the Simplify Suite server after a user logs in with the following caveat: <ul style="list-style-type: none"> If Always add client's default is selected, and the client's default printer <i>is not</i> included in the first "n" of printers that are displayed in the available list, then first the "n-1" number of printers that are displayed in the list of available printers are added as is the client's default printer.
Extended Settings - Provide additional printing features that can be useful depending on your users' environments.	
Allow default printer spoofing	If enabled, then a user can specify a printer that is not defined as the default printer on the ScrewDrivers client to be the default printer on the Simplify Suite server for a terminal session. Note: This option is applicable for situations in which a user can work locally or through a terminal session, but requires a different default printer in each case.
Recapture the default printer after <u>30</u> seconds	If enabled, then the default printer for the ScrewDrivers client is set again on the Simplify Suite server after the specified time period. This prevents the traditional "server printers" from being set as the user's default printers during a terminal session. You can change the default value of 30 seconds as needed.
Delete printers on session disconnect, and add on reconnect	If enabled, then when a terminal session is disconnected, or a user logs off, all the client printers are removed from the Simplify Suite server. When the terminal session is reconnected, or a user logs back in, all the client printers are then built again on the server.

- In the Owners pane in Simplify Console, select the owner (user or group) to which you are assigning the settings.

The selected owner is displayed at the top of the Assignment hierarchy in the Assignments pane.
- Assign the Default ScrewDrivers Settings to the selected owner.



To review how to assign objects to an owner, see ["Managing Assignments" on page 58](#).

Appendix A

ScrewDrivers Troubleshooting

This appendix provides some general considerations when troubleshooting ScrewDrivers. It also provides information about solving some of the most common problems you might encounter when using ScrewDrivers.

This appendix covers the following topics:

- [“General Troubleshooting Considerations” on page 111.](#)
- [“ScrewDrivers Server Troubleshooting” on page 112.](#)
- [“ScrewDrivers Client Troubleshooting” on page 115.](#)

General Troubleshooting Considerations

The most common issues that you encounter with ScrewDrivers are the following:

- Printers are not building for any user.
- Printers are not deleted after a user logs off a session.
- Output issues with fonts and/or graphics.
- Missing features.
- Slow server spooling.
- Users are seeing duplicate printers.
- Users are seeing other users' printers.
- The default printer is not being assigned correctly, or assigned at all.

When you are troubleshooting ScrewDrivers, keep in mind the three key functional areas that are involved:

- The application from which the job is being printed.
- The ScrewDrivers Server and client.
- The client spooler and native print driver.

As is typical with any product, the recommended way to troubleshoot ScrewDrivers is to eliminate possible causes first, and then focus on the root cause. Generally, when troubleshooting ScrewDrivers, you should first determine whether the problem resides with the ScrewDrivers Server or the client. To do this, you can test ScrewDrivers with multiple clients. If the same negative results are associated with multiple clients, then more than likely, the problem resides on the server. After you have isolated the problem to the server or the client, your next step is to review the troubleshooting recommendations in this appendix. If you cannot resolve the issue using the recommendations in this appendix, then you must contact support@tricerat.com for additional assistance.

ScrewDrivers Server Troubleshooting

The following are high-level instructions for troubleshooting the ScrewDrivers Server. If you cannot resolve the issue with your ScrewDrivers Server based on these instructions, then contact support@tricerat.com for additional assistance.

Printers are not building for any user



The following procedure should be carried out only if no users are logged in to the ScrewDrivers Server.

Typically, when printers build for a user's session, they are displayed in the users' Registry under HKLM\System\Current\ControlSet\Control\Print\Printers. Keeping in mind that a user sees only those printers for which permissions have been granted, the system location is equivalent to what is observed in the regular Printers folder in the Terminal or Remote Desktop session. If printers are not building for a user, then you must reinstall the print driver and the printer port.

1. Navigate to the following directory: C:\Windows\System32\spool\drivers\w32x86\3
2. Rename the following files, sd<version number>drv.dll and sd<version number>ui.dll with an extension of .old: for example, rename sd6drv.dll and sd6ui.dll to sd6drv.old and sd6ui.old.
3. Reboot the print server.
4. Delete the two "old" files that you renamed in [Step 2](#).
5. Navigate to the following directory: C:\Tricerat\ScrewDrivers Server <Version Number>, for example, ScrewDrivers Server v6.
6. Run the following executables in the order indicated:
 - install_driver.exe (installs the print driver)
 - install_port.exe (installs the printer port)



An error message that indicates that the ports have already been installed might open. You can ignore this message, and click OK to continue.

- setsec_server.exe (sets the security for the server components)

Your users should now be able to log in to new sessions and have their printers built.

Some printers are not deleted when the user logs off

You can clear the spool directory.



The following procedure should be carried out only if no users are logged in to the ScrewDrivers Server.

1. Open the Services dialog box: Control Panel > Administrative Tools > Services.
2. Stop the Windows Print Spooler service.
3. In Windows\System32\Spool\Printers, delete all files.
4. Start the Windows Print Spooler service.
5. Under Printers and Faxes on the server, delete any printers that are not installed directly on the server.

Output issues with fonts and/or graphics

If fonts are not being formatted correctly and/or fonts and graphics are not properly scaling, then two options are available:

- [Upgrade](#) the print driver on the ScrewDrivers client.
- [Enable](#) Print-As-Image.

Upgrade the print driver

You should first attempt to resolve the issue by upgrading the print driver.

1. Upgrade the local print driver to the latest version on the ScrewDrivers client, where PCL > PS.
2. Carry out a query on the ScrewDrivers client.
3. Carry out a test print.

If the issue is still not resolved, then your next option is to enable Print-As-Image on the server.

Enable Print-As-Image

You [enable](#) Print-As-Image either mid-session, or you can [set](#) Print-As-Image as the default for a client printer.

To enable Print-As-Image mid-session

1. In any application on the ScrewDrivers Server, click Print to open a Print dialog box.
2. In the list of available printers on the Print dialog box, select the correct ScrewDrivers printer, and then click Preference to open the Printing Preferences dialog box.
3. On the Printing Preferences dialog box, open the Extended Options tab.

4. On the Extended Options tab, select Sent print job as an image, and then set the DPI.
5. Click OK.

To set Print-As-Image as the default for a printer

1. Open the ScrewDrivers Client Control Panel.
2. Open the Printers tab.
3. In the list of Available Printers, select the appropriate printer.
4. In the Extended Options - Print Job Rendering Options panel, enable Print-As-Image, and then set the DPI.
5. Click Apply.

Users are seeing duplicate printers

By default, auto-creation is turned on for Citrix (ICA protocol) or Terminal Services (RDP protocol). If auto-creation is enabled through Citrix or Terminal Services, then it is possible for users to see duplicate printers after the ScrewDrivers Server and client are installed. As a result, Tricerat recommends that you turn off auto-creation in your ScrewDrivers environment. This not only eliminates the appearance of duplicate printers, but it also mitigates the known issues that are associated with auto-creation such as print driver problems, output (font and graphics) problems, and so on.

Users are seeing not only their own printers but also other users' printers

This problem is not associated with ScrewDrivers. Instead, it is a known third-party issue. Contact support@tricerat.com for assistance.

ScrewDrivers Client Troubleshooting

The following are high-level instructions for troubleshooting the ScrewDrivers client. If you cannot resolve the issue with your ScrewDrivers client based on these instructions, then contact support@tricerat.com for additional assistance.

ScrewDrivers not building during a session

Generally, the two most common reasons for ScrewDrivers not building during a session are:

- Client updates.
- Incompatible ScrewDrivers client version.

Client updates

If the ICA or RDP client is updated, then the reference to the ScrewDrivers client is overwritten. To resolve this issue, run the appropriate executable on the ScrewDrivers client:

- For an ICA client: C:\Program Files\Tricerat\Simplify Printing\ScrewDrivers Client <Version Number>\install_ica.exe.
- For an RDP client: C:\Program Files\Tricerat\Simplify Printing\ScrewDrivers Client <Version Number>\install_rdp.exe.

Incompatible ScrewDrivers client version

The version of ScrewDrivers client that is currently installed on a workstation is displayed on the About tab of the ScrewDrivers Client Control Panel. If the ScrewDrivers client that is installed on a workstation is not the most current version, then you have two options:

- You can download the most recent version from the Tricerat website at <http://www.tricerat.com/support-center/downloads/printing-clients>, and then manually update the client version.
- You can enable automatic client updates on the server side, and prevent the client from ever being out of date.

If neither of these options work, then the final troubleshooting step is to reinstall the ScrewDrivers client. To do so:

1. Uninstall the current ScrewDrivers client through Add/Remove Programs.
2. Restart the client workstation.
3. Install the latest version of the ScrewDrivers client.

Output issues with fonts and/or graphics

If fonts are not being formatted correctly and/or fonts and graphics are not properly scaling, then two options are available:

- [Upgrade](#) the print driver on the ScrewDrivers client.
- *If allowed by the server* (Suggest), [enable](#) Print-As-Image.

Upgrade the print driver

You should first attempt to resolve the issue by upgrading the print driver.

1. Upgrade the local print driver to the latest version on the ScrewDrivers client, where PCL > PS.
2. Carry out a query on the ScrewDrivers client.
3. Carry out a test print.

If the issue is still not resolved, then enable Print-As-Image on the server.

Enable Print-As-Image

You [enable](#) Print-As-Image either mid-session, or you can [set](#) Print-As-Image as the default for a client printer.

To enable Print-As-Image mid-session

1. In any application on the ScrewDrivers client, click Print to open a Print dialog box.
2. In the list of available printers on the Print dialog box, select the correct ScrewDrivers printer, and then click Preference to open the Printing Preferences dialog box.
3. On the Printing Preferences dialog box, open the Extended Options tab.
4. On the Extended Options tab, select Sent print job as an image, and then set the DPI.
5. Click OK.

To set Print-As-Image as the default for a printer

1. Open the ScrewDrivers Client Control Panel.
2. Open the Printers tab.
3. In the list of Available Printers, select the appropriate printer.
4. In the Extended Options - Print Job Rendering Options panel, enable Print-As-Image, and then set the DPI.
5. Click Apply.

Default printer not being set correctly for one or more users

Windows printer information is stored in the HKEY_CURRENT_USER hive. If a user logs in to ScrewDrivers with the same username from multiple different locations, then all these logins modify the HKEY_CURRENT_USER hive. Because there can be only one default printer, the printers do not get assigned correctly for any session other than the most recent session. To resolve this issue, you should first disable Windows printer mapping. If the problem still persists, and multiple users are having this issue, then verify whether these multiple users are using the same username to log in to the same ScrewDrivers environment. If they are not using the same username, then verify whether each user is logging in to different client computers with the same username while remaining logged in to the original session.

Section 3

Simplify Profiles

Section Contents

- [Getting Started with Simplify Profiles on page 119](#)
- [Managing Registry and Profile Objects in Simplify Profiles on page 126](#)
- [Managing Windows Policy Objects in Simplify Profiles on page 160](#)
- [Managing Administrative Template Objects in Simplify Profiles on page 180](#)
- [Simplify Profiles Tools on page 188](#)

Chapter 1

Getting Started with Simplify Profiles

Simplify Profiles enables administrators to deliver personalized environments to their users, regardless of the Windows profile that is in use (Local, Roaming, or Mandatory). Simplify Profiles is built on Tricerat's RegSet™ technology. RegSet provides a mechanism for saving a user's registry settings to the Simplify database, and then restoring these settings to the registry in subsequent sessions, regardless of the server that user is logging in to. User data is exported to the Simplify database at logoff, and then imported in to the user's profile at logon. This chapter provides information about logging in to the Simplify Console for managing your Simplify Profiles instance. It also provides a high-level overview of the interactions between Simplify Profiles and Windows profiles and policies. Finally, it details the relevant considerations for using Simplify Profiles such as running Simplify Profiles in offline mode, logging on to multiple sessions of Simplify Profiles, database connection considerations, and uninstalling Simplify Profiles.



Although Simplify Profiles enables administrators to deliver personalized environments to their users regardless of the Windows profile that is in use, for optimum performance, Tricerat recommends using Simplify Profiles on top of a single Mandatory profile that is applied to all your users.



If your users have Roaming profiles, then you can use the Simplify Migration Utility to migrate users from Roaming profiles to hybrid Simplify Profiles. See [“Simplify Migration Utility”](#) on page 197.

This chapter covers the following topics:

- [“Accessing Simplify Profiles”](#) on page 120.
- [“Interactions Between Simplify Profiles and Windows Profiles and Policies”](#) on page 121.
- [“Logging on to Simplify Profiles”](#) on page 124.
- [“Uninstalling Simplify Profiles”](#) on page 125.

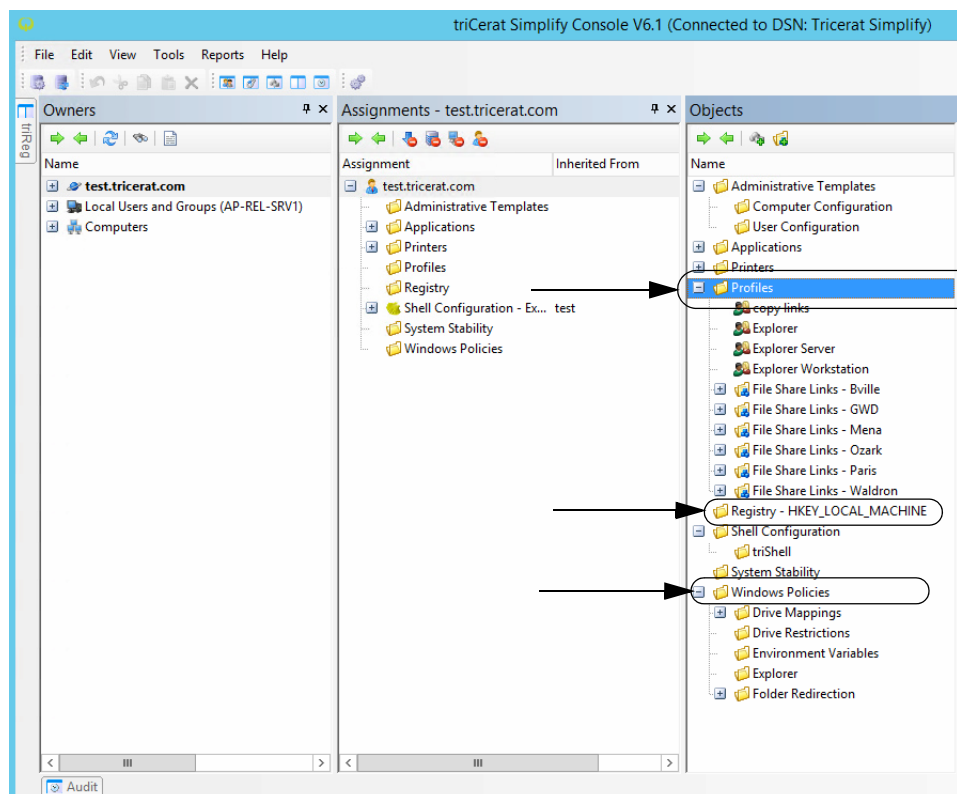
Accessing Simplify Profiles

If your organization has licensed Simplify Profiles, then after you log in to the Simplify Console, the following three entries are displayed in the Objects pane: Profiles, Registry-HKEY_LOCAL_MACHINE, and Windows Policies.



For information about opening and logging in to the Simplify Console, see [“Simplify Console Overview” on page 18.](#)

Figure 1-1: Simplify Profiles entries in the Objects pane



Interactions Between Simplify Profiles and Windows Profiles and Policies

After a user logs in, and Windows loads the user's profile, Simplify Profiles applies personalized settings to the user's profile via the ntuser.dat file. Tricerat's RegSet plug-in pulls data from the Simplify database to make the Simplify Profiles assignments. Typically, the implementation of Simplify Profiles consists of replacing a user's Windows configuration (GPOs, scripts, other utilities, and so on) with Simplify Profiles assignments. It is important to note, however, that Simplify Profiles does not hinder existing Windows policies, assignments, or other scripts, including GPOs. These existing settings continue to apply to the user's session. Simplify Profiles settings simply take precedence over these existing settings.



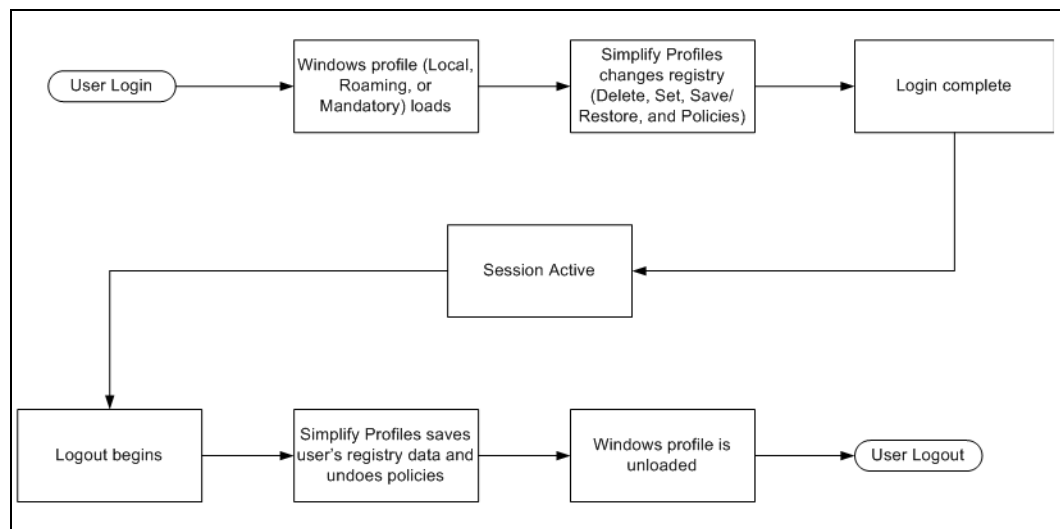
For optimum performance, Tricerat recommends starting with a baseline Mandatory Windows profile that is appropriate for your users' terminal server environment, and then applying customized settings for each user through Simplify Profiles.

At logout, Simplify Profiles captures values from the registry for the profile and registry objects that are to be saved before the user's profile is unloaded. After Simplify Profiles has captured all the necessary registry values, Windows unloads the user's profile normally.



To ensure graceful logoffs in more complex environments, Tricerat recommends using Microsoft's User Profile Hive Cleanup (UPHC) service.

Figure 1-2: Interactions between Simplify Profiles and Windows Profiles and policies



Running Simplify Profiles in Offline Mode

If your users are without database access or network access, then to allow your users to retain their profile settings, you can [run](#) Simplify Profiles in Offline mode.



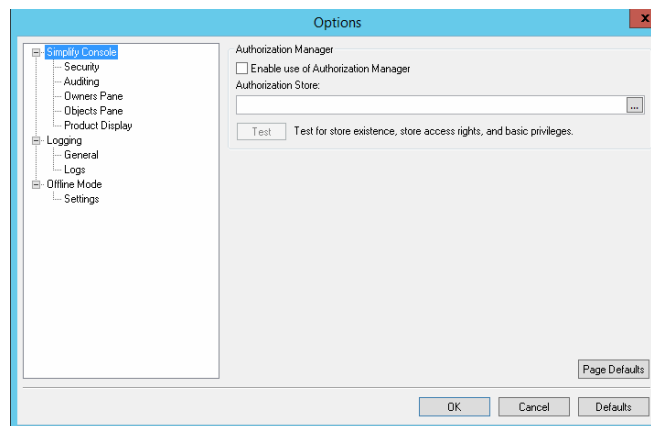
To receive their profile settings while offline, users must have logged on at least once while the Simplify Profiles server was properly connected. If a user's profile settings are changed through the Simplify Console, the user does not receive these settings until they next time he/she logs on online.

To run Simplify Profiles in Offline mode

1. On the Simplify Console main menu, select Tools > Options.

The Options dialog box opens.

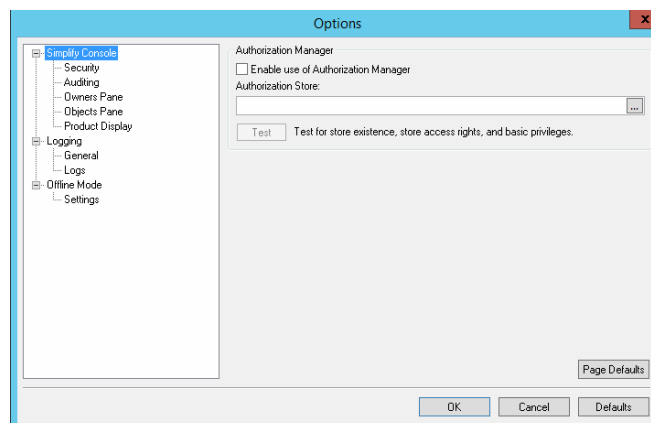
Figure 1-3: Options dialog box



2. Under Offline Mode, select Settings.

The Options dialog box is refreshed with the settings for Offline Mode.

Figure 1-4: Options dialog box with Offline Mode settings



3. Do either one or both of the following as appropriate:
 - Select Enable Offline Mode for Simplify Profiles.
 - If Simplify Desktop is also installed on this same client, then select Enable Offline Mode for Simplify Desktop.



If you make changes to the Offline mode, then for these changes to be recognized, you must restart the Simplify Profiles and Simplify Lockdown services.

4. Click OK.
The Options dialog box closes. Offline mode is now enabled.

Logging on to Simplify Profiles

Two situations are critical to consider in reference to logging on to Simplify Profiles:

- Users logging on to multiple sessions of Simplify Profiles. See [“Multiple session logons”](#) below.
- Users logging on to Simplify Profiles and the database connection fails. See [“Failed database connections”](#) below.

Multiple session logons

Typically, you configure a terminal server to limit users to a single session; however, if the configuration does limit the number of sessions that a user can log on to, and a user logs on to multiple sessions of Simplify Profiles, then to limit the chances of a conflict occurring, Simplify Profiles saves only the registry data that has changed for the *last* session that the user logged on to. If a conflict still occurs, however, then the information that is saved from the last logoff remains in the Simplify database.

For Microsoft's Terminal Services RDP, users typically connect to a desktop where multiple applications can be launched. Because of the limitations in the Windows Operating Systems and Windows Profiles, multiple RDP connections to a single server are not recommended.

Citrix ICA protocol supports session sharing which overcomes the limitations in the Windows Operating Systems and Windows Profiles. The session sharing technology opens multiple applications from a single session, which results in the user profile being shared for every published application. As the Simplify Suite administrator, you should research session sharing to ensure that every application, server, and farm is configured for session sharing. For example, you must configure the resolution and color depth identically for published applications to use session sharing.

Failed database connections

If the connection to the Simplify database is not available, but Offline Mode is enabled, then Simplify Profiles performs as expected. Any changes made through Simplify Console after the user last logged in are not applied.

If the connection to the Simplify database is not available, but Offline Mode is not enabled, Simplify Profiles does not retrieve the user registry assignments, and registry changes are not made for the user's session. Instead, the profile that is loaded is the user's Windows profile that is normally loaded in the absence of Simplify Profiles, such as the user's Local profile or the user's Network profile. If a Local or Roaming profile is loaded for the user, the settings from the previous session might have been saved into the profile, and therefore, might still be active during the session.



For information about Offline mode, see [“Running Simplify Profiles in Offline Mode”](#) on page 122.

Uninstalling Simplify Profiles

Simplify Profiles modifies the registry at each user logon. If you uninstall Simplify Profiles, then the registry settings are no longer applied to the user profile. If the user profile, however, remains, it can contain saved data from any previously implemented registry settings. With a Mandatory profile, the system resets the previous registry settings after the user logs off. With a Roaming profile, any registry settings applied by Simplify Profiles remain even after you uninstall Simplify Profiles. No new settings are applied to the user profile.

Uninstalling Simplify Suite does not automatically uninstall the Simplify database. If the Simplify database remains intact, and you reinstall Simplify Profiles, then both registry definitions and saved registry values are again available.

Chapter 2

Managing Registry and Profile Objects in Simplify Profiles

Simplify Profiles allows administrators to deliver personalized environments to their users with Windows profiles. Delivering these personalized environments requires that administrators be able to manage critical Windows objects for their users such as registry and profile objects, Windows policy objects, and so on. This chapter details the management of registry and profile objects, which provide the backbone for Simplify Profiles through registry and file operations.

This chapter covers the following topics:

- [“Profile and Registry Objects Overview” on page 127.](#)
- [“Assigning Registry Operations to Profile Objects” on page 129.](#)
- [“Assigning Operations to User Files and Folders” on page 135.](#)
- [“Configuring Assigned Registry Operations or User File/Folder Operations for a Profile Object” on page 150.](#)
- [“Assigning Registry Operations to Registry Objects” on page 152.](#)
- [“Adding Custom Items to the User or Machine Registry” on page 158.](#)

Profile and Registry Objects Overview

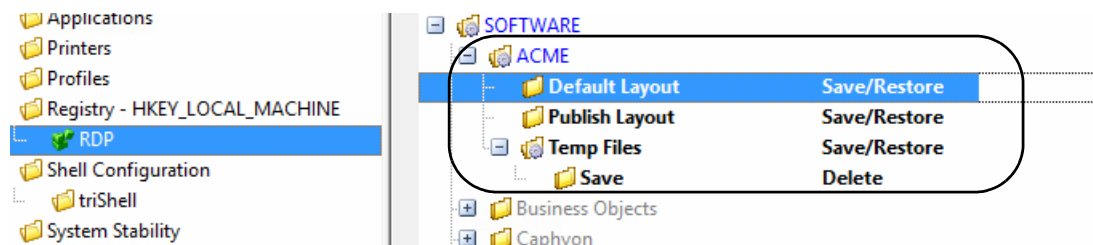
Profile objects define registry operations on the HKEY_CURRENT_USER (HKCU) registry key and on user files during user logon and logoff. Registry objects define registry operations on the HKEY_LOCAL_MACHINE registry key (HKLM) during server startup and shutdown. Managing profile and registry objects in Simplify Profiles consists of assigning the necessary registry operations—Save/Restore, Set, or Delete—to these objects' registry items (registry key or registry value) in your users' profiles as well as assigning the correct user file operations through profile objects.

Registry Operation	Definition
Save/Restore	<p>Exports saved registry settings to the Simplify database database at user logoff and then imports these same settings into the user's profile at logon.</p> <p>Save/Restore operations enable you to replace Roaming profiles with Mandatory or Local profiles without losing any features or functions. These operations optimize logon/logoff performance, mitigate corruption, and ensure securely backed up user settings. During a user session, the Save/Restore occurs during user logon and logoff. When a user logs on, Simplify Profiles retrieves the saved registry values from the Simplify database and then applies these values to the user's session. After a user initiates logout, Simplify Profiles saves the selected registry values back to the Simplify database. Because Simplify Profiles uses the centralized Simplify database, the saved settings can be retrieved from any other server on which the Simplify Suite is installed. Each user maintains his or her own unique set of registry settings, even if the registry definition is applied to a group of users. You can assign multiple registry operations within a single Profile or Registry object.</p>
Set	<p>Imports administrator-defined registry settings into the user's profile at logon.</p> <p>The Set operation allows for the integration of mandatory settings with roaming settings in the same profile. When you assign the Set operation to a Registry object, you can set specific values in the registry every time a user logs on. The user can still change a set value during a session, but every time a user logs off and then logs back in, the value is reset to the value that you specified. You can use the Set operation to lockdown applications, replace Group Policies, and/or set system and application settings. The Set operation is also particularly applicable for forcing security settings for poorly secured applications such as Internet Explorer.</p>
Delete	<p>Deletes settings from a user's profile at logon.</p> <p>Temporary keys or values that are left behind by applications can falsely enlarge a user's profile and reduce efficiency. The Delete operation provides a method for you to clean the registry and regain this lost efficiency.</p>

You can assign only a single registry operation to a *registry item* (registry key or registry value) for a Profile object or Registry object. If another registry operation has already been assigned to the item, then you must first Cancel the existing operation before you can assign another operation.

You can assign multiple registry operations within a single *Profile object* or a single *Registry object*. This means that you can create a new Profile or Registry object, or modify an existing Profile or Registry object, that contains any combination of Save/Restore, Set, and Delete operations, with each operation assigned at the registry item level. If you assign multiple registry operations for the same object, then the configurations that use Delete are applied first, followed by Set, and then finally, by Save/Restore. This order of registry operations ensures that if Save/Restore information is present, then a default configuration is first set in all profiles, and then user-customized Save/Restore values are set as the final configuration.

Figure 2-1: Registry object with multiple operations assigned at the registry item level



You cannot apply custom permissions to the registry values that Simplify Profiles creates. Instead, the default inherited permissions that are already defined in the registry are used.

Because all registry hives other than the HKCU (such as the HKLM) are not user-specific, any registry operations that you assign to these hives are assigned to the entire system. Although Simplify Profiles allows this, you must consider the ramifications of such actions before working with a hive other than HKCU. For example, for some applications, you must assign the operations to registry keys in the HKLM hive instead.

Assigning Registry Operations to Profile Objects

Managing Profile objects in Simplify Profiles consists of **assigning** the necessary registry operations—Save/Restore, Set, or Delete—to these objects in your users' profiles. These registry operations are applicable for the user-based registry items (user applications, user settings, and so on) in your users' profiles. After you assign registry operations to a Profile object, then optionally, you can configure the operations, which means to specify when the operations are to start and when the operations are to end.



For optional performance, in addition to a single Mandatory profile that is applied to all your users, the entire HKEY_CURRENT_USER hive should grant Full Control to Everyone and System.



To assign a registry operation to a new or existing Profile object

1. Do one of the following:
 - If you are assigning a registry operation to an existing Profile object, then in the Objects pane, under Profiles, select the appropriate Profile object.
 - If you are assigning a registry operation to a new Profile object, then in the Objects pane, under Profiles, create a new Profile object, and then name the object.



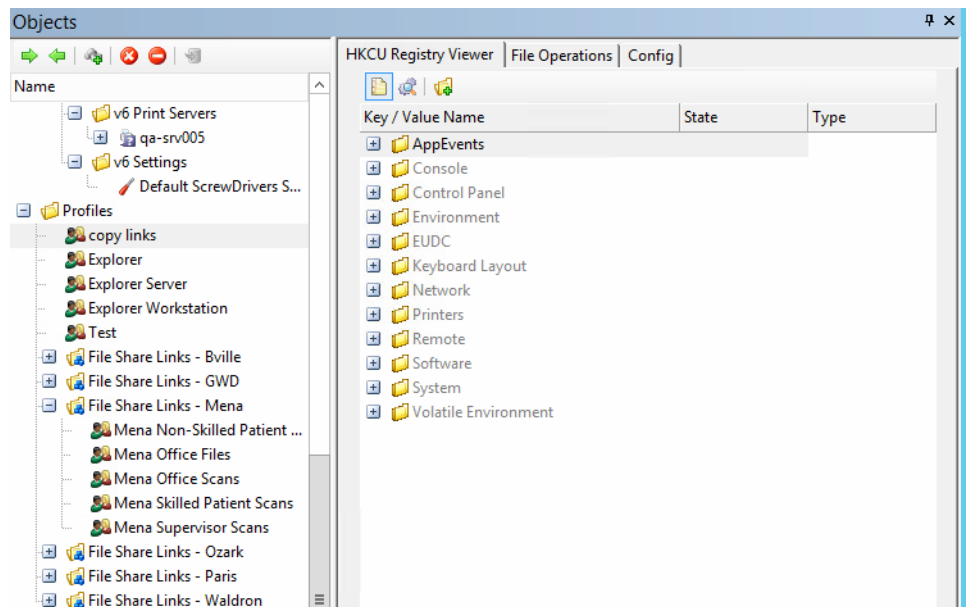
To review how to add objects in the Simplify Console, see [“Managing Objects” on page 52](#).

The Profile object form opens. The form has three tabs:

- The HKCU Registry Viewer tab, which is open by default and displays a snapshot of the current user registry. To change the view to show only those registry items to which an operation has been assigned, click the View Only Registry Operations icon  on the tab's toolbar. To return the to the full registry view for the object, click the Full Registry View icon .
- The File Operations tab, which displays all the operations that you can assign to user files and folders. See [“Assigning Operations to User Files and Folders” on page 135](#).
- The Config tab, which contains options for determining when beginning operations such as registry sets, restores, and deletes occur, and when ending operations such as registry restores occur. See [“Configuring Assigned Registry Operations or User File/Folder Operations for a Profile Object” on page 150](#).

See [Figure 2-2 on page 130](#).

Figure 2-2: Profile object form, HKCU Registry Viewer tab



2. Continue to one of the following:
 - “To assign a Save/Restore operation to a Profile object” below.
 - “To assign a Set operation to a Profile object” on page 132.
 - “To assign a Delete operation to a Profile object” on page 133.



Simplify Profiles includes a RegDiff tool and triReg tool, which you can use to help in locating and creating registry items with the correct settings. See [Chapter 5](#), “Simplify Console Tools,” on page 73.

To assign a Save/Restore operation to a Profile object

You can assign a Save/Restore operation to a registry key or registry value for a Profile object.



You can assign a Save/Restore operation to the entire HKEY_CURRENT_USER hive, but to reduce logon times and prevent unnecessary data replication on the network, Tricerat recommends that you assign Save/Restore at a more granular level.

1. On the HKCU Registry Viewer tab, expand the tree structure as needed to locate the appropriate registry item for the object, and then right-click the registry item.

The context menu that opens always contains a Create New Value option and a Create New Key option. The other options that are displayed depend on whether you selected a registry key or a registry value.



For information about the Create New Value and Create New Key options, see “Adding Custom Items to the User or Machine Registry” on page 158.

Selected Registry Item	Menu Options
Registry Key	<ul style="list-style-type: none"> • Save/Restore • Entire Key and All Subkeys • Entire Key and No Subkeys • Delete Key
Registry Value	<ul style="list-style-type: none"> • Set This Value • Save/Restore Value • Delete This Value

2. Do one of the following:

- If you selected a registry key, then click Save/Restore, and then select one of the two sub-menu options: Entire Key and All Subkeys or Entire Key and No Subkeys.
- If you selected a registry value, then click Save/Restore This Value.

The selected item is displayed in bold on the HKCU Registry Viewer tab to indicate that a registry operation has been assigned to it. The State column on the HKCU Registry Viewer tab specifies the Save/Restore registry operation. If you assigned the Save/Restore operation for Entire Key and All Subkeys, then all children that are affected by the operation are also displayed in bold on the HKCU Registry Viewer tab.



To cancel a Save/Restore registry operation at any time, right-click the registry item and on the context menu that opens, click Cancel Operation.

3. If you selected a registry value, then continue to [Step 4](#); otherwise, if you selected a registry key, then optionally, do one or both of the following:

- After setting a Save/Restore for a registry key, right-click the key value and on the context menu that opens, select Set Default Value.



If you select Set Default Value, then a value is written during the first logon for the user. For subsequent logons, the value that is saved in the user’s registry data replaces this default value.

- After setting a Save/Restore for Entire Key and All Subkeys, right-click the appropriate subkey and on the context menu that opens, select Set Key As Exception.



If you select Set Key as Exception, then the Save/Restore data is applied to all keys except for this specifically selected subkey. You can set exceptions for multiple subkeys.

4. If the assigned registry operation is to start and end based on user logon and logoff respectively, then assign the Profile object to the appropriate owner; otherwise, continue to [“Configuring Assigned Registry Operations or User File/Folder Operations for a Profile Object”](#) on page 150.



To review how to assign objects in the Simplify Console, see [“Managing Assignments”](#) on page 58.

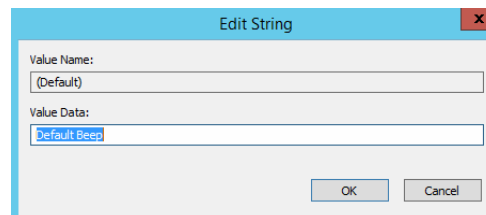
To assign a Set operation to a Profile object

You can assign a Set operation only to a registry *value* for a Profile object.

1. On the HKCU Registry Viewer tab, expand the tree structure as needed to locate the appropriate registry value for the object.
2. Right-click the registry value, and on the context menu that opens, click Set This Value.

The Edit dialog box open. The registry value type is indicated in the title, for example, Edit String or Edit Word, and so on. The dialog box displays the current default value for the selected registry value. See [Figure 2-3 on page 132](#).

Figure 2-3: Edit String dialog box example



3. Edit the value as appropriate, and then click OK.

The Edit dialog box closes. The selected registry value is displayed in bold on the HKCU Registry Viewer tab to indicate that a registry operation has been assigned to it. The State column on the HKCU Registry Viewer tab specifies the Set registry operation. All *parent* items affected by the operation are displayed in blue on the HKCU Registry Viewer tab.



To cancel a Set registry operation at any time, right-click the registry value and on the context menu that opens, click Cancel Operation.

4. If the assigned registry operation is to start and end based on user logon and logoff respectively, then assign the Profile object to the appropriate owner; otherwise, continue to [“Configuring Assigned Registry Operations or User File/Folder Operations for a Profile Object”](#) on page 150.



To review how to assign objects in the Simplify Console, see [“Managing Assignments”](#) on page 58.

To assign a Delete operation to a Profile object

If you assign a Delete operation to a registry item for a Profile object that was previously assigned a Save/Restore operation (Entire Key and All Subkeys or Entire Key and No Subkeys), then during the restore operation, Simplify Profiles removes these registry items from the saved information. If the selected registry scope is Apply to This Key and all SubKeys or Apply to this key only, then this order of operations prevents the deletion of registry items on one server from propagating to other servers.

1. On the HKCU Registry Viewer tab, expand the tree structure as needed to locate the appropriate registry item for the object.
2. Right-click the registry item.

The context menu that opens always contains a Create New Value option and a Create New Key option. The other options that are displayed depend on whether you selected a registry key or a registry value.

Selected Registry Item	Menu Options
Registry Key	<ul style="list-style-type: none"> • Save/Restore • Entire Key and All Subkeys • Entire Key and No Subkeys • Delete Key
Registry Value	<ul style="list-style-type: none"> • Set This Value • Save/Restore Value • Delete This Value



For information about the Create New Value and Create New Key options, see [“Adding Custom Items to the User or Machine Registry”](#) on page 158.

3. Do one of the following:
 - If you selected a registry key, then click Delete Key.
 - If you selected a registry value, then click Delete This Value.

The selected item is displayed in bold on HKCU Registry Viewer tab to indicate that a registry operation has been assigned to it. The State column on the HKCU Registry Viewer tab specifies the Delete registry operation. All *parent* items affected by the operation are displayed in blue on the HKCU Registry Viewer tab.



To cancel a Delete registry operation at any time, right-click the registry item and on the context menu that opens, click Cancel Operation.

4. If the assigned registry operation is to start and end based on user logon and logoff respectively, then assign the Profile object to the appropriate owner; otherwise, continue to [“Configuring Assigned Registry Operations or User File/Folder Operations for a Profile Object”](#) on page 150.



To review how to assign objects in the Simplify Console, see [“Managing Assignments”](#) on page 58.

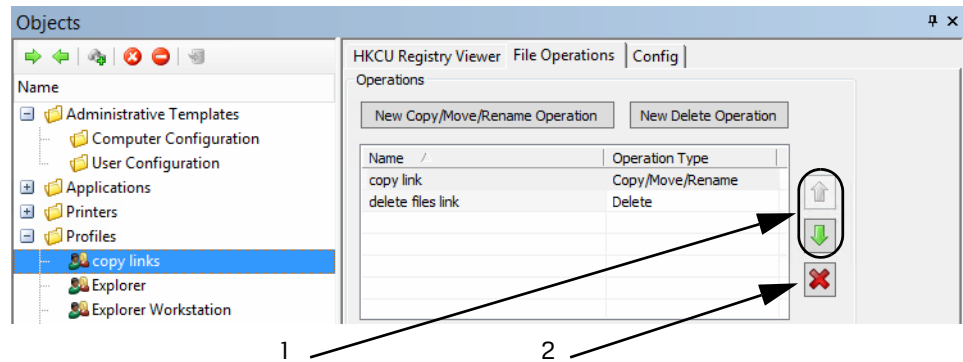
Assigning Operations to User Files and Folders

The File Operations that are available through Simplify Profiles provide the options for copying, moving, renaming, and deleting files and folders when a user log on to or off of a terminal session. Many common file and folder locations such as the User's Profile, Local AppData, and a User's Documentation and Program Files are built in to Simplify Profiles to assist in file operations and folder redirection. File and folder operations in Simplify Profiles include the following:

- Copy operation – You can [assign](#) the Copy operation to both user files and folders. The Copy operation is useful for situations that require you to “roam” specific directories for a user's profile. For example, consider the situation in which an application must write files to a temporary directory. It might not be efficient to redirect a user's temporary directory to a network share drive. With the Copy operation, however, the temporary directory can be copied *from* a network share location after a user logs on, and then copied back to the network share location after the user logs off. See [“To assign a Copy operation to a user file or folder” on page 136](#).
- Move operation – You can [assign](#) the Move operation to both user files and folders. The operation works similarly to the Copy operation. With the Move operation, however, after the Copy operation completes, the target user file or folder is automatically deleted. To offset this deletion, an option is available to move the destination files or folders back to the target location at user logoff or application end, and then delete the destination file/folder. See [“To assign a Move operation to a user file or folder” on page 140](#).
- Rename operation – You can [assign](#) the Rename operation to both user files and folders. The Rename operation provides the option of renaming a target file or folder independently from a Copy or Move operation. The target file or folder remains in its original location. See [“To assign a Rename operation to a user file or folder” on page 144](#).
- Delete operation – You can [assign](#) the Delete operation to both user files and folders. The Delete operation provides the option of deleting files or folders at user logon or logoff or at application start or end. For example, you might want to delete files from a user's AppData folder or delete a user's local cached profile completely when the user logs off a terminal session. See [“To assign a Delete operation to a user file or folder” on page 147](#).

You can assign multiple file operations to a user Profile object. For example, as shown in [Figure 2-4 on page 136](#), the copy links Profile object has two file operations assigned to it: a Copy/Move/Rename operation and a Delete operation. The order in which the file operations are listed in the Operation Type pane is the order in which the operations are carried out for a Profile object. You can use the Move Up/Move Down icons to the right of the Operation Type pane to change the order of file operations for a Profile object, and you can click the Delete icon to remove a file operation from a Profile object. After you assign the necessary user file or folder operations for a Profile object, then optionally, you can configure the operations, which means to specify when the operations are to start and when the operations are to end.

Figure 2-4: Multiple file operations for a user Profile object



Item	Description
1	Rearrange the order of file operations.
2	Delete a selected file operation.

To assign a Copy operation to a user file or folder

- Do one of the following:
 - If you are modifying an existing Copy operation for a Profile object, then in the Objects pane, under Profiles, select the appropriate object, and then go to [Step 3](#).
 - If you are assigning a new Copy operation to a Profile object, then in the Objects pane, under Profiles, create a new object, and name it accordingly, for example, Copy.

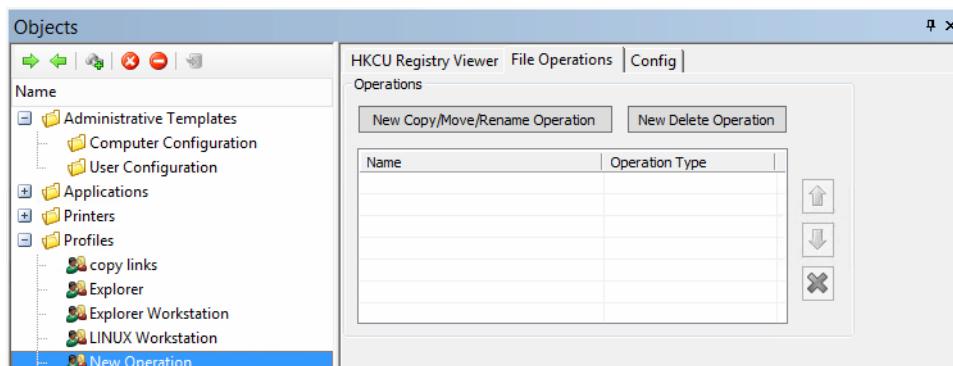


To review how to add objects in the Simplify Console, see [“Managing Objects” on page 52](#).

The Profile object form opens. The HKCU Registry Viewer tab is the open tab. See [Figure 2-2 on page 130](#).

- On the Profile object form, open the File Operations tab.

Figure 2-5: Profile object form, File Operations tab



3. On the File Operations tab, click New Copy/Move/Rename Operation.

In the Operation Type pane, below the New Copy/Move/Rename Operation button, a New Object placeholder for the Copy operation is displayed and the Operation Type is set to Move/Copy/Rename. By default, the Operation Type is set to Copy File(s).



If you are modifying an existing Copy operation, then the File Operations tab displays the current values for the operation, including its name in the Operation Type pane.

Figure 2-6: Profile object form, File Operations tab with new Copy/Move/Rename operation

4. Name the new object as appropriate, for example, Copy Temp Files.
5. Specify the Copy operation variables.

Variable	Description
Type of Operation	Select one of two values: Copy File(s) or Copy Folder(s).
Perform the Operation	<p>Indicates when to carry out the operation. Select one of two values:</p> <ul style="list-style-type: none"> • User Logon/Logoff. • Execute on Session Disconnect/Reconnect (Enabled only if User Logon/Logoff is selected). <p>Note: The value that you select here must align with the option that you select on the Configuration tab. See “Configuring Assigned Registry Operations or User File/Folder Operations for a Profile Object” on page 150.</p>

Variable	Description
File to Copy or Folder to Copy	<p>Enter the name of the target file or target folder, or click Browse to open the Open dialog box and browse to and select the target file or target folder for the operation. The target path can be either a local path or a Universal Naming Convention (UNC) path. The path name can also include any of the following Windows environment variables: %APPDATA%, %PROGRAMFILES%, %USERNAME%, and %USERPROFILE%.</p> <p>You can use any of these predefined target locations followed by a backslash (\) and then the folder or file name to point to a file or folder that is found in the selected location, for example, [Program Files]\Tricerat.</p> <p>Note: The use of mapped drive letters is not supported; however, you can use the UNC path to overcome this limitation.</p>
Destination	<p>Enter the destination directory or click Browse to open the Open dialog box and browse to and select the location to which the target file or folder is to be copied. The destination path can be either a local path or a UNC path. The path name can also include any of the following Windows environment variables: %APPDATA%, %PROGRAMFILES%, %USERNAME%, and %USERPROFILE%.</p> <p>You can use any of these predefined destination locations followed by a backslash (\) and then the folder or file name to point to a file or folder that is found in the selected location, for example, [Program Files]\Tricerat.</p> <p>Note: The use of mapped drive letters is not supported; however, you can use the UNC path to overcome this limitation.</p>

6. Select the appropriate operation-specific settings.

Option	Description
Copy File Options	
Overwrite file if it exists	If a target file is named identically to a destination file, then overwrite the destination file with the target file.
Overwrite Read-Only files	If a target file is named identically to a destination file, and the file is a read-only file, then overwrite the destination file with the target file. Note: Applicable only if Overwrite file if it exists is also selected.
Overwrite older files	If a destination file is older than the target file, then overwrite the destination file. Note: Applicable only if Overwrite file if it exists is also selected.
Copy file back at end	Copy the <i>destination</i> file back to the target location after one of the following occurs: <ul style="list-style-type: none"> • User logoff • Session disconnect
Include Hidden/System files	If you enter the name for a hidden or system file to copy, then you MUST also select this option.

Option	Description
Perform copy asynchronously	By default, the Copy operation must complete in its entirety before any other system processes can occur, including user logon. If selected, then the system does not wait for the Copy operation to complete before continuing with any other processes, including user logon.
Copy Folder Operations	
Include subfolders	Include all sub-folders for a targeted directory in the Copy operation.
Overwrite file if it exists	If a target folder/file is named identically to a destination folder/file, then overwrite the destination folder/file with the target folder/file.
Overwrite Read-Only files	If a target folder/file is named identically to a destination folder/file, and the destination folder/file is read-only, then overwrite the destination folder/file with the target folder/file. Note: Applicable only if Overwrite file if it exists is also selected.
Overwrite older files	If a destination folder/file is older than the target folder/file, then overwrite the destination folder/file. Note: Applicable only if Overwrite file if it exists is also selected.
Copy folder back at end	Copy the <i>destination</i> folder/file back to the target location after one of the following occurs: <ul style="list-style-type: none"> • User logoff • Session disconnect
Include Hidden/System files	When selecting a target folder to copy and the target folder includes hidden or system files, then you MUST select this option to include all hidden files and system files in the Copy operation.
Perform copy asynchronously	By default, the Copy operation must complete in its entirety before any other system processes can occur, including user logon. If selected, then the system does not wait for the Copy operation to complete before continuing with any other processes, including user logon.
Continue on error	If an error occurs during the copying of a target folder/file, then continuing copying any remaining folder/files to the specified destination. Do not stop the Copy operation.

7. If the assigned file/folder operation is to start and end based on user logon and logoff respectively, then assign the Profile object to the appropriate owner; otherwise, continue to [“Configuring Assigned Registry Operations or User File/Folder Operations for a Profile Object”](#) on page 150.



To review how to assign objects in the Simplify Console, see [“Managing Assignments”](#) on page 58.

To assign a Move operation to a user file or folder

1. Do one of the following:
 - If you are modifying an existing Move operation for a Profile object, then in the Objects pane, under Profiles, select the appropriate object, and then go to [Step 3](#).
 - If you are assigning a new Move operation to a Profile object, then in the Objects pane, under Profiles, create a new object, and name it accordingly, for example, Move.

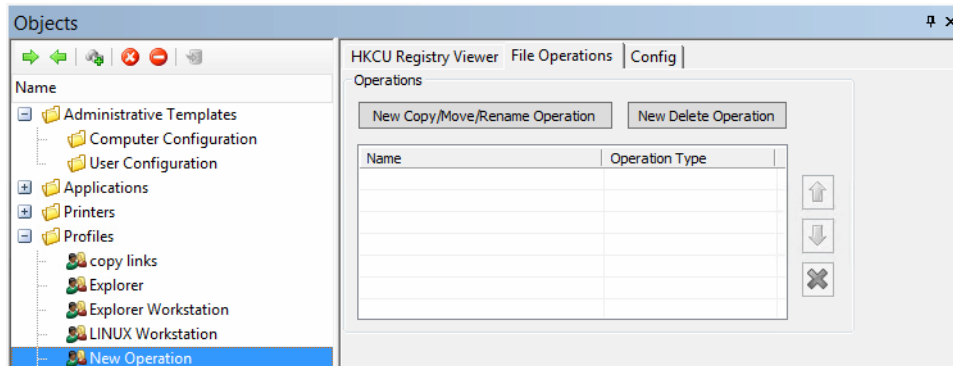


To review how to add objects in the Simplify Console, see [“Managing Objects” on page 52](#).

The Profile object form opens. The HKCU Registry Viewer tab is the open tab. See [Figure 2-2 on page 130](#).

2. On the Profile object form, open the File Operations tab.

Figure 2-7: Profile object form, File Operations tab



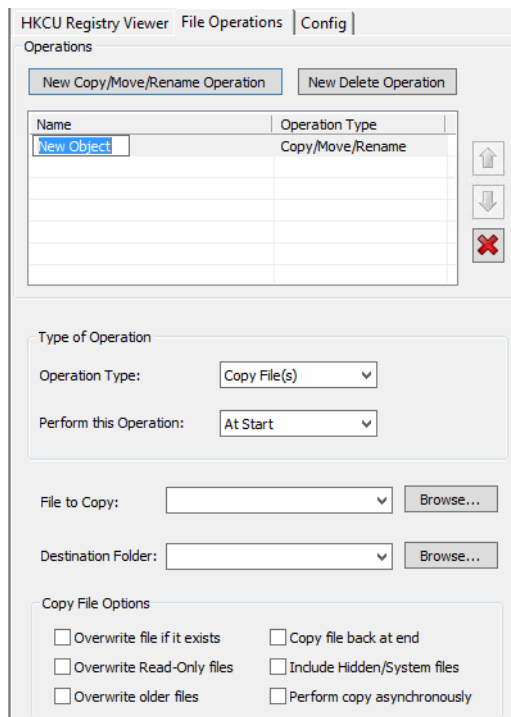
3. On the File Operations tab, click New Copy/Move/Rename Operation.

In the Operation Type pane, below the New Copy/Move/Rename Operation button, a New Object placeholder for the Move operation is displayed and the Operation Type is set to Move/Copy/Rename. By default, the Operation Type is set to Copy File(s). See [Figure 2-8 on page 141](#).



If you are modifying an existing Move operation, then the File Operations tab displays the current values for the operation, including its name in the Operation Type pane.

Figure 2-8: Profile object form, File Operations tab with new Copy/Move/Rename operation



4. Name the new object as appropriate, for example, Move Temp Folders.
5. Specify the Move operation variables.

Variable	Description
Type of Operation	Select one of two values: Move File(s) or Move Folder(s). Note: After you select the operation type, the File Operations tab is refreshed with Move File Options or Move Folder Options accordingly.
Perform the Operation	Indicates when to carry out the operation. Select one of two values: <ul style="list-style-type: none"> • User Logon/Logoff. • Execute on Session Disconnect\Reconnect (Enabled only if User Logon/Logoff is selected). Note: The value that you select here must align with the option that you select on the Configuration tab. See “Configuring Assigned Registry Operations or User File/Folder Operations for a Profile Object” on page 150.

Variable	Description
File to Copy or Folder to Copy	<p>Enter the name of the target file or target folder, or click Browse to open the Open dialog box and browse to and select the target file or target folder for the operation. The target path can be either a local path or a Universal Naming Convention (UNC) path. The path name can also include any of the following Windows environment variables: %APPDATA%, %PROGRAMFILES%, %USERNAME%, and %USERPROFILE%.</p> <p>You can use any of these predefined target locations followed by a backslash (\) and then the folder or file name to point to a file or folder that is found in the selected location, for example, [Program Files]\Tricerat.</p> <p>Note: The use of mapped drive letters is not supported; however, you can use the UNC path to overcome this limitation.</p>
Destination	<p>Enter the destination directory or click Browse to open the Open dialog box and browse to and select the location to which the target file or folder is to be copied. The destination path can be either a local path or a UNC path. The path name can also include any of the following Windows environment variables: %APPDATA%, %PROGRAMFILES%, %USERNAME%, and %USERPROFILE%.</p> <p>You can use any of these predefined destination locations followed by a backslash (\) and then the folder or file name to point to a file or folder that is found in the selected location, for example, [Program Files]\Tricerat.</p> <p>Note: The use of mapped drive letters is not supported; however, you can use the UNC path to overcome this limitation.</p>

6. Select the appropriate operation-specific settings.

Option	Description
Move File Options	
Overwrite file if it exists	If a target file is named identically to a destination file, then overwrite the destination file with the target file.
Overwrite Read-Only files	If a target file is named identically to a destination file, and the file is a read-only file, then overwrite the destination file with the target file. Note: Applicable only if Overwrite file if it exists is also selected.
Overwrite older files	If a destination file is older than the target file, then overwrite the destination file. Note: Applicable only if Overwrite file if it exists is also selected.
Move file back at end	Copy the <i>destination</i> file back to the target location after user logoff or application end, and then delete the file from its destination location.
Include Hidden/System files	If you enter the name for a hidden or system file to move, then you MUST also select this option.
Perform copy asynchronously	By default, the Copy operation must complete in its entirety before any other system processes can occur, including user logon. If selected, then the system does not wait for the Copy operation to complete before continuing with any other processes, including user logon.

Option	Description
Copy Folder Operations	
Include subfolders	Include all sub-folders for a targeted directory in the Copy operation.
Overwrite file if it exists	If a target folder/file is named identically to a destination folder/file, then overwrite the destination folder/file with the target folder/file.
Overwrite Read-Only files	If a target folder/file is named identically to a destination folder/file, and the folder/file is a read-only file, then overwrite the destination folder/file with the target folder/file. Note: Applicable only if Overwrite file if it exists is also selected.
Overwrite older files	If a destination folder/file is older than the target folder/file, then overwrite the destination folder/file. Note: Applicable only if Overwrite file if it exists is also selected.
Move folder back at end	Copy the target folder/file back to the target location after user logoff or application end, and then delete the folder/file from the destination location. Note: If both Include Subfolders and Move folder back at end are selected, then target folder/files and all its subfolders/files are copied back to the target location and the destination folder/files and subfolders/files are deleted.
Include Hidden/System files	When selecting a target folder to copy, you MUST select this option to include all hidden files and system files in the target folder in the Copy operation.
Perform copy asynchronously	By default, the Copy operation must complete in its entirety before any other system processes can occur, including user logon. If selected, then the system does not wait for the Copy operation to complete before continuing with any other processes, including user logon.
Continue on error	If an error occurs during the copying of a target folder/file, then continuing copying any remaining folder/files to the specified destination. Do not stop the Copy operation.

7. If the assigned file/folder operation is to start and end based on user logon and logoff respectively, then assign the Profile object to the appropriate owner; otherwise, continue to [“Configuring Assigned Registry Operations or User File/Folder Operations for a Profile Object” on page 150.](#)



To review how to assign objects in the Simplify Console, see [“Managing Assignments” on page 58.](#)

To assign a Rename operation to a user file or folder

1. Do one of the following:
 - If you are modifying an existing Rename operation for a Profile object, then in the Objects pane, under Profiles, select the appropriate object, and then go to [Step 3](#).
 - If you are assigning a new Rename operation to a Profile object, then in the Objects pane, under Profiles, create a new object, and name it accordingly, for example, Rename.

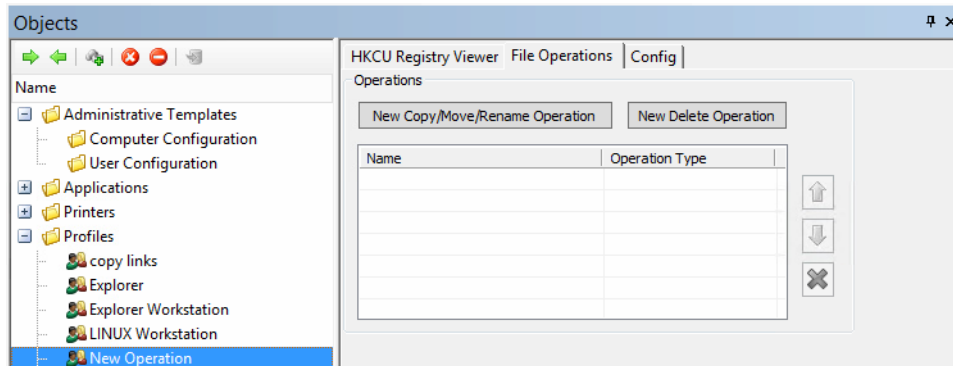


To review how to add objects in the Simplify Console, see [“Managing Objects” on page 52](#).

The Profile object form opens. The HKCU Registry Viewer tab is the open tab. See [Figure 2-2 on page 130](#).

2. On the Profile object form, open the File Operations tab.

Figure 2-9: Profile object form, File Operations tab



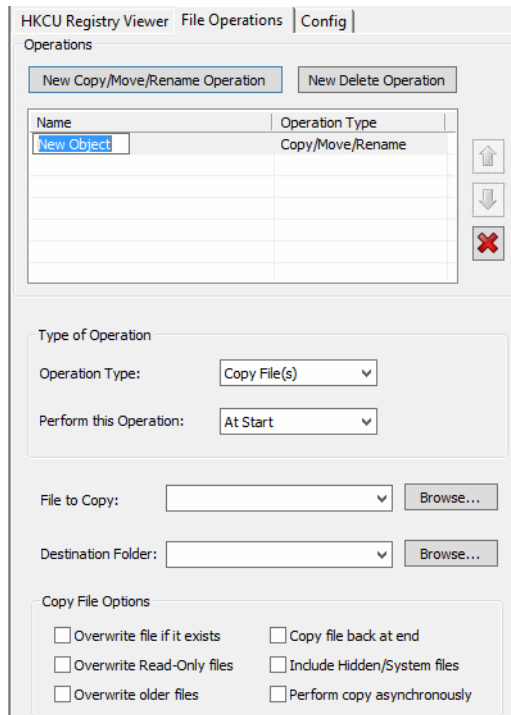
3. On the File Operations tab, click New Copy/Move/Rename Operation.

In the Operation Type pane, below the New Copy/Move/Rename Operation button, a New Object placeholder for the Rename operation is displayed and the Operation Type is set to Move/Copy/Rename. By default, the Operation Type is set to Copy File(s). See [Figure 2-10 on page 145](#).



If you are modifying an existing Rename operation, then the File Operations tab displays the current values for the operation, including its name in the Operation Type pane.

Figure 2-10: Profile object form, File Operations tab with new Copy/Move/Rename operation



4. Name the new object as appropriate, for example, Rename Temp Files.
5. Specify the Rename operation variables.

Variable	Description
Type of Operation	Select one of two values: Rename File(s) or Rename Folder(s). Note: After you select the operation type, the File Operations tab is refreshed with Rename File Options or Rename Folder Options accordingly.
Perform the Operation	Indicates when to carry out the operation. Select one of two values: <ul style="list-style-type: none"> • User Logon/Logoff. • Execute on Session Disconnect\Reconnect (Enabled only if User Logon/Logoff is selected). Note: The value that you select here must align with the option that you select on the Configuration tab. See “Configuring Assigned Registry Operations or User File/Folder Operations for a Profile Object” on page 150.

Variable	Description
File to Rename or Folder to Rename	<p>Enter the file or folder name, or click Browse to open the Open dialog box and browse to and select the target file or target folder for the operation. The target path can be either a local path or a Universal Naming Convention (UNC) path. The path name can also include any of the following Windows environment variables: %APPDATA%, %PROGAMFILES%, %USERNAME%, and %USERPFOFILE%.</p> <p>You can use any of these predefined target locations followed by a backslash (\) and then the folder or file name to point to a file or folder that is found in the selected location, for example, [Program Files]\Tricerat.</p> <p>Note: The use of mapped drive letters is not supported; however, you can use the UNC path to overcome this limitation.</p>
New File Name or New Folder Name	<p>Enter the new name for the target file or folder.</p> <p>Note: Because a renamed file or folder remains in its original target location, you cannot Browse to and select a different location.</p>

6. Select the appropriate operation-specific settings.

Option	Description
Rename File(s) Options	
Overwrite file if it exists	If a file already exists that is named identically to the renamed target file, then overwrite the existing file with the target file.
Perform Rename asynchronously	By default, the Rename operation must complete in its entirety before any other system processes can occur, including user logon. If selected, then the system does not wait for the rename to complete before continuing with any other processes, including user logon.
Rename Folder(s) options	
Overwrite folder if it exists	If a folder already exists that is named identically to the renamed target folder, then overwrite the existing folder/file with the target folder/file.
Perform Rename asynchronously	By default, the Rename operation must complete in its entirety before any other system processes can occur, including user logon. If selected, then the system does not wait for the Rename operation to complete before continuing with any other processes, including user logon.

7. If the assigned file/folder operation is to start and end based on user logon and logoff respectively, then assign the Profile object to the appropriate owner; otherwise, continue to [“Configuring Assigned Registry Operations or User File/Folder Operations for a Profile Object”](#) on page 150.



To review how to assign objects in the Simplify Console, see [“Managing Assignments”](#) on page 58.

To assign a Delete operation to a user file or folder

1. Do one of the following:
 - If you are modifying an existing Delete operation for a Profile object, then in the Objects pane, under Profiles, select the appropriate object, and then go to [Step 3](#).
 - If you are assigning a new Delete operation to a Profile object, then in the Objects pane, under Profiles, create a new object, and name it accordingly, for example, Delete.

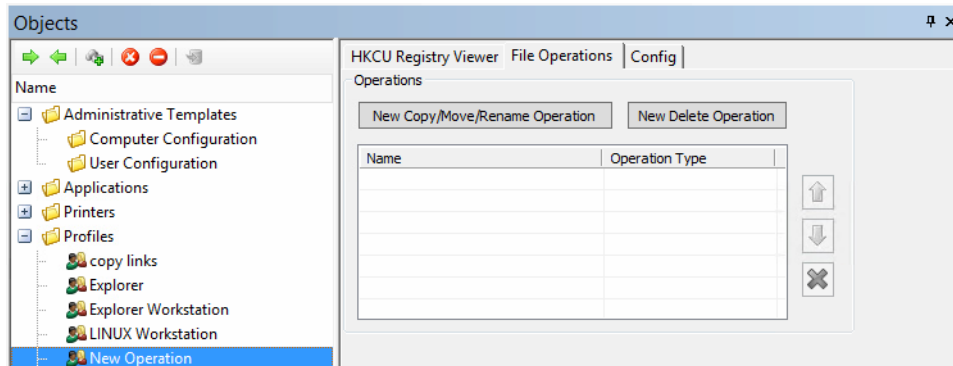


To review how to add objects in the Simplify Console, see [“Managing Objects” on page 52](#).

The Profile object form opens. The HKCU Registry Viewer tab is the open tab. See [Figure 2-2 on page 130](#).

2. On the Profile object form, open the File Operations tab.

Figure 2-11: Profile object form, File Operations tab



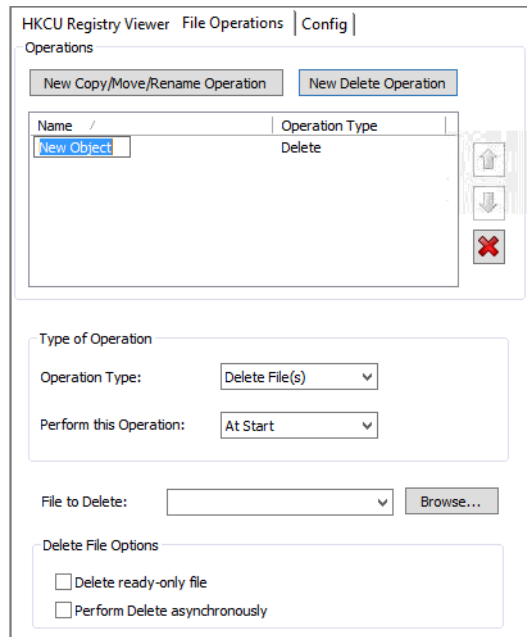
3. On the File Operations tab, click New Delete Operation.

In the Operation Type pane, below the New Delete Operation button, a New Object placeholder for the Delete operation is displayed and the Operation Type is set to Delete. By default, the Operation Type is set to Delete File(s). See [Figure 2-12 on page 148](#).



If you are modifying an existing Delete operation, then the File Operations tab displays the current values for the operation, including its name in the Operation Type pane.

Figure 2-12: Profile object form, File Operations tab with new Delete operation



4. Name the new object as appropriate, for example, Delete Temp Files.
5. Specify the Delete operation variables.

Variable	Description
Type of Operation	Select one of two values: Delete File(s) or Delete Folder(s).
Perform the Operation	<p>Indicates when to carry out the operation. Select one of two values:</p> <ul style="list-style-type: none"> • User Logon/Logoff. • Execute on Session Disconnect\Reconnect (Enabled only if User Logon/Logoff is selected). <p>Note: The value that you select here must align with the option that you select on the Configuration tab. See “Configuring Assigned Registry Operations or User File/Folder Operations for a Profile Object” on page 150.</p>
File to Delete or Folder to Delete	<p>Enter the name of the file or folder, or click Browse to open the Open dialog box and browse to and select the target filer or target folder for the operation. The target path can be either a local path or a Universal Naming Convention (UNC) path. The path name can also include any of the following Windows environment variables: %APPDATA%, %PROGAMFILES%, %USERNAME%, and %USERPFOFILE%.</p> <p>You can use any of these predefined target locations followed by a backslash (\) and then the folder or file name to point to a file or folder that is found in the selected location, for example, [Program Files]\Tricerat.</p> <p>Note: The use of mapped drive letters is not supported; however, you can use the UNC path to overcome this limitation.</p>

6. Select the appropriate operation-specific settings.

Option	Description
Delete File(s) Options	
Delete read-only file	Delete the target file even if it is read-only.
Perform Delete asynchronously	By default, the Delete operation must complete in its entirety before any other system processes can occur, including user logon. If selected, then the system does not wait for the Delete operation to complete before continuing with any other processes, including user logon.
Delete Folder(s) options	
Delete read-only file	Delete the target folder even if it is read-only.
Perform Rename asynchronously	By default, the Delete operation must complete in its entirety before any other system processes can occur, including user logon. If selected, then the system does not wait for the Delete operation to complete before continuing with any other processes, including user logon.

7. If the assigned file/folder operation is to start and end based on user logon and logoff respectively, then assign the Profile object to the appropriate owner; otherwise, continue to [“Configuring Assigned Registry Operations or User File/Folder Operations for a Profile Object”](#) on page 150.



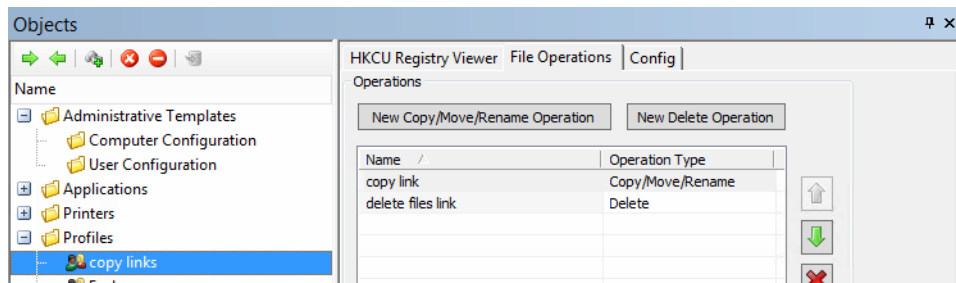
To review how to assign objects in the Simplify Console, see [“Managing Assignments”](#) on page 58.

Configuring Assigned Registry Operations or User File/Folder Operations for a Profile Object

After you assign registry operations or user file/folder operations to a Profile object, then optionally, you can **configure** the operations, which means to specify when the registry operations (Save/Restore, Set, and Delete) operations and/or file operations are to start and when the registry operations (Restore) and/or file operations are to end. By default, all assigned operations are configured to start at user logon and end at user logoff. You can leave this configuration as-is, or you can modify the configuration to start when a user logs on *or* when the user reconnects to a terminal session and to end when a user logs off *or* when the user disconnects from the terminal session.

If multiple *file* operations have been assigned to a Profile object, you cannot configure each assignment individually. Instead, only a single configuration is applicable for all the operations that are assigned to the object. For example, as shown in [Figure 2-13](#) below, two file operations have been assigned to the copy links Profile object: copy link and delete link. You cannot configure different start and end “triggers” for the two operations, such as user logon/user logoff for the copy link and session reconnect/disconnect for the delete link. Instead, a single configuration, *either* user logon/user logoff *or* session reconnect/session disconnect applies to both file operations.

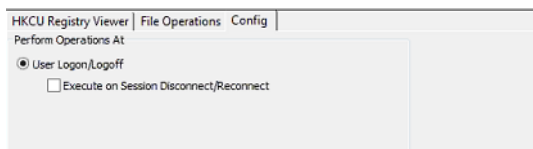
Figure 2-13: Multiple file operations for a user Profile object



To configure assigned registry or user file/folder operations

1. In the Objects pane, under Profiles, select the appropriate Profile object.
The Profile object form opens. The HKCU Registry Viewer tab is the open tab. See [Figure 2-2 on page 130](#).
2. Open the Config tab.
By default, Perform Operations At is set to User Logon/Logoff. If this configuration option is selected, then beginning operations occur when a user logs on to a terminal session and ending operations occur when a user logs off the terminal session. You can leave this default value as-is, or you can also select Execute on Session Disconnect/Reconnect to have the configuration to start when a user logs on *or* when the user reconnects to a terminal session and to end when a user logs off a terminal session *or* when the user disconnects from the terminal session. See [Figure 2-14 on page 151](#).

Figure 2-14: Profile object form, Config tab



3. Assign the Profile object to the appropriate owner.



To review how to assign objects in the Simplify Console, see [“Managing Assignments” on page 58](#).

Assigning Registry Operations to Registry Objects

Managing registry objects in Simplify Profiles consists of [assigning](#) the necessary registry operations—Save/Restore, Set, or Delete—to these objects in your users' profiles. These registry operations are applicable for the machine-based registry items in your users' profiles and are effective only when they are assigned to locations where computers are located such as in organizational units (OUs), groups and so on. When a computer boots up, Simplify Profiles places these assignments in the computer's local registry, which means that these assignments are applied to the whole system. When the computer shuts down, Simplify Profiles removes these assignments from the local registry.

To assign a registry operation to a Registry object

1. Do one of the following:
 - If you are assigning a registry operation to an existing Registry object, then in the Objects pane, under the HKEY_LOCAL_MACHINE, select the appropriate Registry object.
 - If you are assigning a registry operation to a new Registry object, then in the Objects pane, under the HKEY_LOCAL_MACHINE, create a new Registry object.



To review how to add objects in the Simplify Console, see [“Managing Objects” on page 52](#).



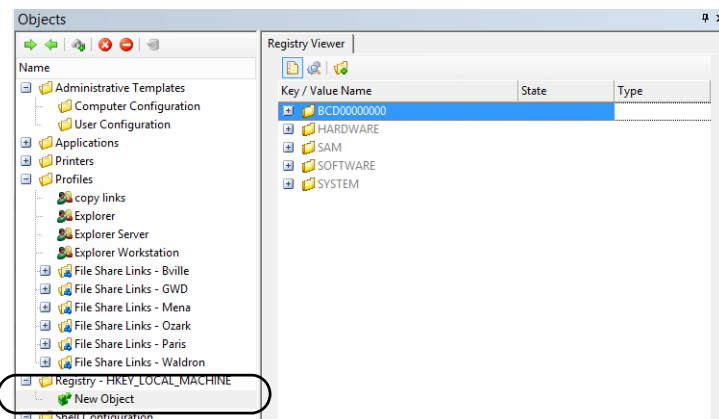
A Registry object form opens. The form has a single tab, the Registry Viewer tab, which displays a snapshot of the current machine registry. To change the view to show only those registry items to which an operation has been assigned, click the View Only Registry Operations icon  on the tab's toolbar. To return the to the full registry view for the object, click the Full Registry View icon .

Figure 2-15: Registry object form



2. On the Registry Viewer tab, expand the tree structure as needed to locate the appropriate registry item for the new object.
3. Continue to one of the following:
 - [“To assign a Save/Restore operation to a Registry object”](#) below.
 - [“To assign a Set operation to a Registry object”](#) on page 154.
 - [“To assign a Delete operation to a Registry object”](#) on page 155.



Simplify Profiles includes a RegDiff tool and triReg tool, which you can use to help in locating and creating registry items with the correct settings. See [Chapter 5, “Simplify Console Tools,”](#) on page 73.

To assign a Save/Restore operation to a Registry object

You can assign a Save/Restore operation to either a registry key or a registry value for a Registry object.

1. On the HKCU Registry Viewer tab, expand the tree structure to locate the appropriate registry item for the object, and then right-click the registry item.

The context menu that opens always contains the following two options: Create New Value and Create New Key. The other options that are displayed depend on whether you selected a registry key or a registry value.

Selected Registry Item	Menu Options
Registry Key	<ul style="list-style-type: none"> • Save/Restore <ul style="list-style-type: none"> • Entire Key and All Subkeys • Entire Key and No Subkeys • Delete Key
Registry Value	<ul style="list-style-type: none"> • Set This Value • Save/Restore Value • Delete This Value



For information about the Create New Value and Create New Key options, see [“Adding Custom Items to the User or Machine Registry”](#) on page 158.

2. Do one of the following:
 - If you selected a registry key, then click Save/Restore, and then select one of the two sub-menu options: Entire Key and All Subkeys or Entire Key and No Subkeys.
 - If you selected a registry value, then click Save/Restore This Value.

The selected item is displayed in bold on the Registry Viewer tab to indicate that a registry operation has been assigned to it. The State column on the Registry Viewer tab specifies the Save/Restore registry operation.

- If you assigned the Save/Restore operation for Entire Key and All Subkeys, then all the parents that are affected by the new operation are displayed in blue on the Registry Viewer tab and all the children that are affected by the new operation are displayed in bold on the tab.
- If you assigned the Save/Restore operation for Entire Key and No Subkeys, then all the children that are affected by the new operation are displayed in bold on the Registry Viewer tab.



To cancel a Save/Restore registry operation at any time, right-click the registry item and on the context menu that opens, click Cancel Operation.

3. Assign the Registry object to the appropriate owner.



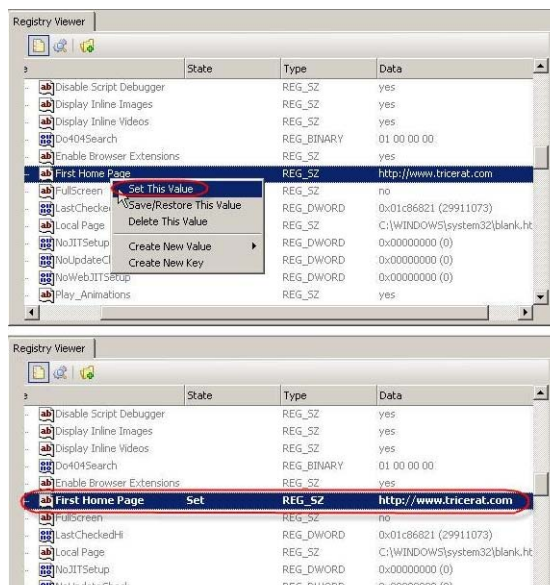
To review how to assign objects in the Simplify Console, see [“Managing Assignments” on page 58](#).

To assign a Set operation to a Registry object

You can assign a Set operation only to a registry *value* for a Registry object. After you assign a Set operation to a registry value, you must restart the server. Although this requirement is a limitation of HKLM registry Sets, often, there is a corresponding HKCU registry key. In these cases, Tricerat recommends that you assign a Set operation to the corresponding HKCU registry key instead of to the HKLM registry key.

[Figure 2-16](#) below is an example of a Set operation assigned to a Registry object. Every time a user logs on to a terminal session, the Home Page for Internet Explorer is set to tricerat.com.

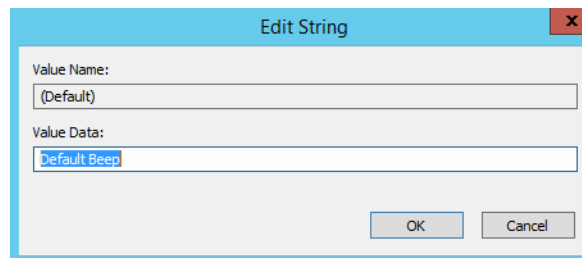
Figure 2-16: Assigning a Set operation to a Registry object



1. On the Registry Viewer tab, expand the tree structure as needed to locate the appropriate registry value for the object.
2. Right-click the registry value, and on the context menu that opens, click Set This Value.

The Edit < > dialog box opens, with the registry value type (string, word, and so on) indicated in the title, for example, Edit String or Edit Word, and so on. The dialog box displays the current default value for the selected registry value.

Figure 2-17: Edit String dialog box example



3. Edit the value as appropriate, and then click OK.

The Edit dialog box closes. The selected registry value is displayed in bold on the Registry Viewer tab to indicate that a registry operation has been assigned to it. The State column on the Registry Viewer tab specifies the Set registry operation. All parent items that are affected by the Set operation for the registry value are displayed in blue on the Registry Viewer tab.



To cancel a Set registry operation at any time, right-click the registry value and on the context menu that opens, click Cancel Operation.

4. Assign the Registry object to the appropriate owner.



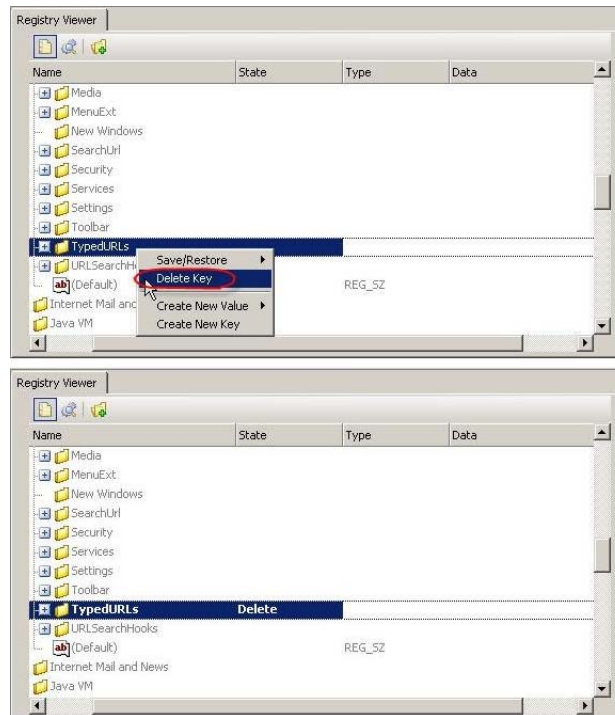
To review how to assign objects in the Simplify Console, see [“Managing Assignments” on page 58](#).

To assign a Delete operation to a Registry object

If you assign a Delete operation to a registry item for a Profile object that was previously assigned a Save/Restore operation (Entire Key and All Subkeys or Entire Key and No Subkeys), then during the restore operation, Simplify Profiles removes these registry items from the saved information. If the selected registry scope is Apply to This Key and all SubKeys or Apply to this key only, then this order of operations prevents the deletion of registry items on one server from propagating to other servers.

[Figure 2-18 on page 156](#) is an example of a Delete operation assigned to a Registry object. Every time a user logs on to a terminal session, the typed URLs under Internet Explorer are deleted.

Figure 2-18: Assigning a Delete operation to a Registry object



1. On the Registry Viewer tab, expand the tree structure as needed to locate the appropriate registry item for the object.
The existing operation is canceled, and the registry item is no longer displayed in bold.
2. Right-click the registry item.
The context menu that opens always contains a Create New Value option and a Create New Key option. The other options that are displayed depend on whether you selected a registry key or a registry value.



For information about the Create New Value and Create New Key options, see [“Adding Custom Items to the User or Machine Registry” on page 158](#).

Selected Registry Item	Menu Options
Registry Key	<ul style="list-style-type: none"> • Save/Restore • Entire Key and All Subkeys • Entire Key and No Subkeys • Delete Key
Registry Value	<ul style="list-style-type: none"> • Set This Value • Save/Restore Value • Delete This Value

3. Do one of the following:

- If you selected a registry key, then click Delete Key.
- If you selected a registry value, then click Delete This Value.

The selected item is displayed in bold on Registry Viewer tab to indicate that a registry operation has been assigned to it. The State column on the Registry Viewer tab specifies the Delete registry operation. All *parent* items affected by the operation are displayed in blue on the Registry Viewer tab.



To cancel a Delete registry operation at any time, right-click the registry item and on the context menu that opens, click Cancel Operation.

4. Assign the Registry object to the appropriate owner.



To review how to assign objects in the Simplify Console, see [“Managing Assignments”](#) on page 58.

Adding Custom Items to the User or Machine Registry

“Standard” registry items refer to the registry items (registry keys and registry values) that are *automatically* added to the user registry or machine registry. In addition to assigning operations to these standard items, you can manually add custom registry items to the user registry and/or machine registry, and then assign operations to these custom items. The operations that you assign to these custom registry items determine how they are handled in the registry at user logon/logoff – are the items saved/restored, is a value set to a specific value, or is a value deleted?

For example, consider the following scenario: As the Simplify Suite administrator, you are aware that your users have a critical piece of desktop publishing software, PageWriter, on their systems from ACME Publishing, Inc. for which the settings must be saved. This application, however, is not installed on the server on which Simplify Console is running, and therefore, an entry for ACME Publishing, Inc. is not displayed under Software on the HKCU Registry Viewer tab. As a result, you could do the following:

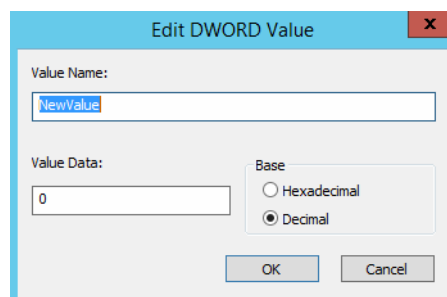
1. On the Registry Viewer tab, right-click on the Software registry key, and on the context menu that opens, click Create New Key, and then name the key ACME Publishing,
2. Right-click the new ACME Publishing registry key, and on the context menu that opens, click Save/Restore, and then on the sub-menu that opens, click Entire Key and all Subkeys.
3. Right-click the new ACME Publishing registry key, and on the context menu that opens, click Create New Key, and then name this subkey PageWriter.

If Save/Restore is set for the key, then you have successfully added the custom registry item; however, if the PageWriter product has an associated value that must be specified, for example, the Maximum Number of Files to Open Upon Application Start, then you would also have to set this value. To set this value, you would have to do the following:

4. Right-click the PageWriter subkey, and on the context menu that opens, click Create New Value, and then on the sub-menu that opens, select the appropriate value type: DWORD, String, Binary, Multi-String, or Expandable String.

The Edit < > Value dialog box opens, for example, the Edit DWORD Value dialog box.

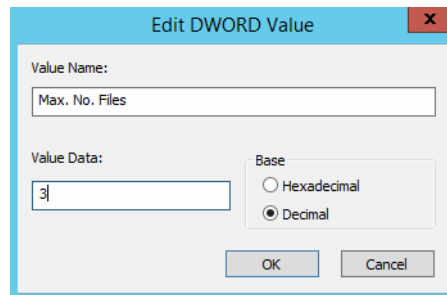
Figure 2-19: Edit DWORD dialog box



5. Name the value and set all the parameters for the value accordingly.

In this example, the name is set to Max. No. Files, the value is set to 3, and the Base is set to Decimal.

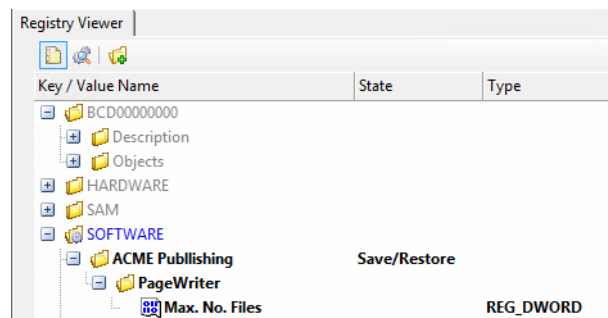
Figure 2-20: Edit DWORD dialog box with parameters specified



6. Click OK.

The Edit Value dialog box closes, and the custom registry item is displayed on the Registry Viewer tab.

Figure 2-21: User Registry with a custom registry item



The following options are available for adding and working with custom registry items in Simplify Profiles:

Option	Description
Create New Value	Available on the context menu for the HKCU Registry Viewer tab and the Registry Viewer tab. Add a value for a custom registry key.
Create New Key	Available on the context menu for the HKCU Registry Viewer tab and the Registry Viewer tab. Add a custom registry key to the user or machine registry.
Remove	Available on the context menu for a custom registry key or value. Delete a custom registry key or value. Note: If a value has been assigned to a custom registry key, then you must first delete the value, and then you can delete the key.
Rename	Available on the context menu for a custom registry key or value. Rename a custom registry key or value.

Chapter 3

Managing Windows Policy Objects in Simplify Profiles

Simplify Profiles allows administrators to deliver personalized environments to their users with Windows profiles. Delivering these personalized environments requires that administrators be able to manage critical Windows objects for their users such as registry and profile objects, Windows policy objects, and so on. This chapter details the management of Windows policy objects in Simplify Profiles.

This chapter covers the following topics:

- [“Windows Policy Objects Overview” on page 161.](#)
- [“Assigning Windows Drive Mappings Policies” on page 162.](#)
- [“Assigning Drive Restrictions Policies” on page 164.](#)
- [“Assigning Environment Variables Policies” on page 167.](#)
- [“Assigning Explorer Restrictions Policies” on page 174.](#)
- [“Assigning Folder Redirection Policies” on page 177.](#)

Windows Policy Objects Overview

In a Windows environment, policies are typically applied in one of two ways: through Group Policies, or through scripts. Through Simplify Profiles, you can easily apply Windows policies to your users' profiles without the overhead of implementing group policy objects and complex scripts. The policies that you can apply through Simplify Profiles include Drive Mappings, Drive Restrictions, Explorer Settings, Folder Redirections, and Environment Variables.

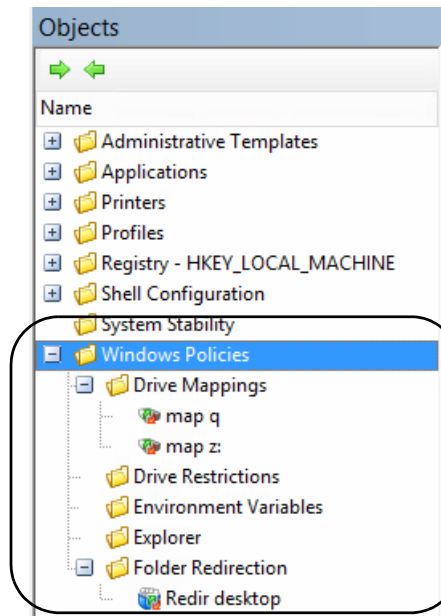
Typically, the implementation of Simplify Profiles consists of replacing a user's Windows configuration (GPOs, scripts, other utilities, and so on) with Simplify Profiles assignments. It is important to note, however, that Simplify Profiles does *not* hinder existing Windows policies, assignments, or other scripts, including GPOs. These existing settings continue to apply to the user's session. After Windows has loaded a user's profile, Simplify Profiles applies personalized settings to the user's profile and these settings simply take precedence over the user's existing settings. At user logoff, Simplify Profiles undoes the personalized policies and the policies are returned to the Windows policies.



For a detailed discussion of the interactions between Simplify Profiles and Windows profiles and policies, see ["Interactions Between Simplify Profiles and Windows Profiles and Policies"](#) on page 121.

After you log in to the Simplify Console, in the Objects pane, expand the Windows Policies entry to view the five available policy objects.

Figure 3-1: Windows policy objects in Simplify Profiles



Assigning Windows Drive Mappings Policies

Instead of using logon scripts to add drive mappings to a user's profile, Simplify Profiles injects the registry keys in to the user's profile via the ntuser.dat file. On some systems, Windows automatically detects the registry changes while other systems, Simplify Profiles must instruct Windows to create the drive mappings and change the registry accordingly. When you [assign](#) drive mappings to a user's profile, not the following:

- To make the authentication process unnecessary, you typically assign drive mappings to a security group of which the user is a member and that has been granted access to the network share.
- Simplify Profiles does support variables such as %USERHOME% AND %USERNAME% for drive mapping; however, to support machine names such as \\tsclient and \\client when referencing the client's local drives, for example, \\tsclient\c\$\Documents and Settings\%USERNAME%\My Documents, the client and server account must be named identically.

To assign Windows Drive Mappings policies

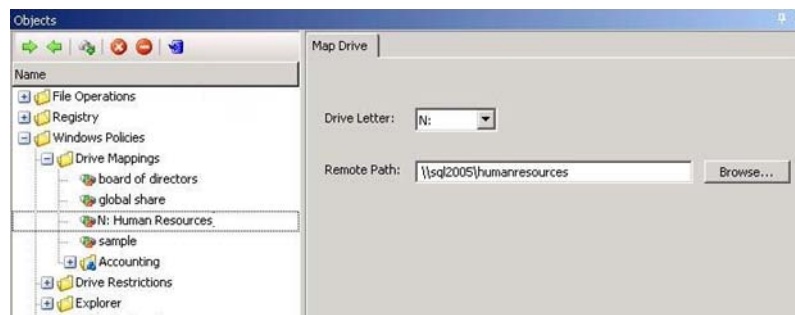
1. Do one of the following:
 - If you are modifying an existing Drive Mapping object, then in the Objects pane, under Windows Policies, select the appropriate Drive Mapping object.
 - If you are assigning a new Drive Mapping object to a profile, then in the Objects pane, under Windows Policies > Drive Mappings, create the new Drive Mapping object, and then name the object, for example, Human Resources.



To review how to add objects in the Simplify Console, see ["Managing Objects" on page 52](#).

The Policy object form opens. The Map Drive tab is the only tab.

Figure 3-2: Policy object form, Map Drive tab



2. On the Drive Letter dropdown list, select the appropriate driver letter.
3. In the Remote Path field, enter the full network path, or click Browse to open the Browse for Folder dialog box, and then browse to and select the network path.

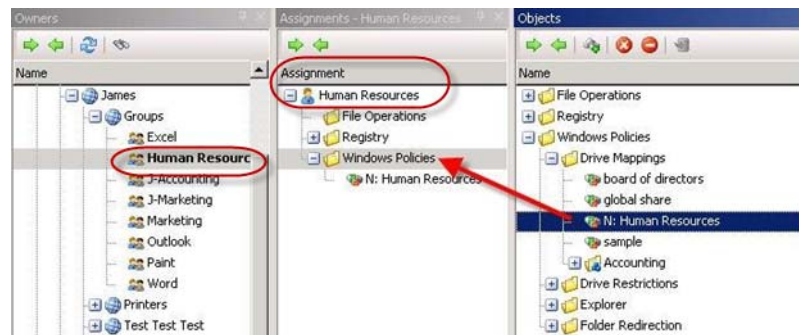
4. Assign the Drive Mapping object to the appropriate owner.



To review how to assign objects in the Simplify Console, see [“Managing Assignments” on page 58](#).

In [Figure 3-3](#) below, the Human Resources Drive Mapping object has been assigned to the Human Resources Active Directory security group.

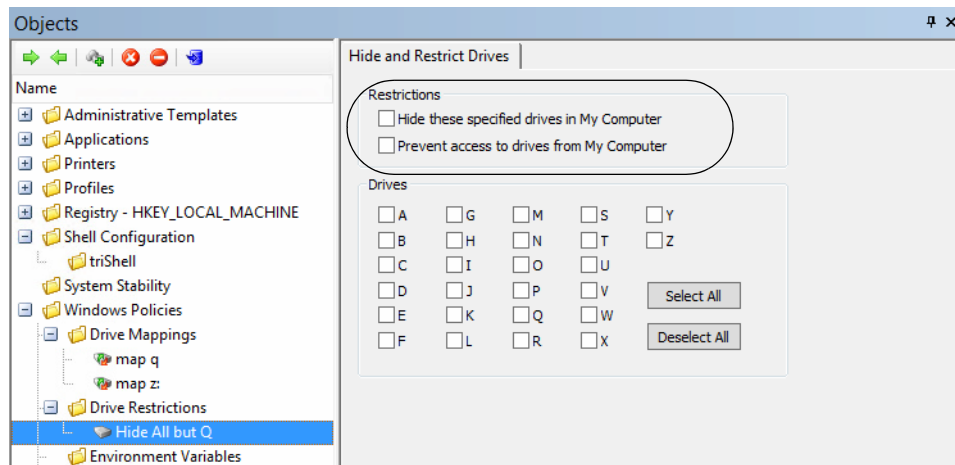
Figure 3-3: Assigning a Drive Mapping object



Assigning Drive Restrictions Policies

You **assign** Drive Restriction policy objects to provide for an easy method for hiding and/or restricting drives during a user session. Drive restriction policies do not replace traditional file permissions; however, they do provide additional security and streamline the user environment.

Figure 3-4: Policy object form, Hide and Restrict Drives tab



The Hide Drives restriction removes the drive from any drive listing dialog boxes, but still allows a user to access the drive directly. The Prevent Access restrictions blocks the user from browsing the drive, but still allows for the drive to be displayed in any drive listing dialog boxes. Although the Prevent Access stops the browsing of a drive, a user can still directly access files on the drive.

Although both Drive Restriction options are valid for setting what a user can see and browse, the restrictions do not circumvent the need for proper file permissions as well. For example, if you assign both the Hide Drive and Restrict Access options to drive C:\ (the system drive), the Hide Drive option prevents a user that opens My Computer from seeing the C:\ in the drive listing. If a user types "C:\" into the address bar, then the message "This operation has been cancelled due to restrictions in effect on this computer. Please contact your system administrator." is displayed; however, if the user types "C:\Windows\notepad.exe" into the address bar, and the user has correct permissions on the Notepad.exe file, then Notepad opens.



Users can still run applications on restricted drives if the applications are executed through triShell shortcuts. The applications will still automatically load files and folders on restricted drives. For information about triShell shortcuts, see the Simplify Desktop User Guide.

To assign Drive Restrictions policies



To remove all drive restrictions for a user, (all drives are shown and all access to all drives is allowed), create a profile (Drive Restriction) object with both restrictions enabled and no drives selected, and then assign this object to the user.

1. Do one of the following:
 - If you are modifying an existing Drive Restriction object, then in the Objects pane, under Windows Policies, select the appropriate Drive Restriction object.
 - If you are assigning a new Drive Restriction object to a profile, then in the Objects pane, under Windows Policies > Drive Restrictions, create a new Drive Restriction object, and then name the object, for example, Block All but Q.



To review how to add objects in the Simplify Console, see ["Managing Objects" on page 52](#).

The Policy object form opens. The Hide and Restricted Drive tab is the only tab. See [Figure 3-4 on page 164](#).

2. Select the types of restrictions that are to be applied.



You can select one or both restrictions.

Restriction	Description
Hide these specified drives in my Computer	If a drive is hidden, then the drive is removed from any drive listing such as Windows Explorer or a Save As dialog box. If a drive is hidden, a user can still enter the drive letter, for example, in Windows Explorer and browse the files on the drive.
Prevent access to the drives from My Computer	If access is restricted to a drive, then user cannot view a listing of any files that are stored on the drive; however, this does not prevent the use from accessing a file if they enter the full path to the file such as in the address bar for Windows Explorer, which makes the file safe to use, even on the system drive.

3. Select the drives to which the restrictions are to be applied.

Figure 3-5: Settings for Block All but Q profile (drive restriction) object



4. Assign the Drive Restriction object to the appropriate owner.



To review how to assign objects in the Simplify Console, see [“Managing Assignments” on page 58](#).

Assigning Environment Variables Policies

Environment variables hold values that are related to the current environment, such as the operating system or user sessions. There are two types of environment variables: *user environment variables*, which set for each user and *system environment variables*, which are set for everyone. An environment variable can have one or more values specified for it, with values separated by semi-colons. Similar to the multiple file operations that can be carried out for a single Profile object, multiple environment variable operations can be carried out for a single Environmental Variable object. An environment variable operation consists of three parts: the Variable Name, the Operation Type, and the Variable Value.

- Variable Name – The Variable Name is the user-specified or system-defined identifier for the Environment Variable object, such as PYTHONPATH.
- Operation Type – The Operation Type identifies the operation (action) that is to be carried for the Environment Variable object. Three operation types are supported for an Environment Variable object:
 - New Value – Sets the value for the Environment Variable object to be the value that is specified for the Variable Value.
 - Delete Existing Value – Deletes the Environment Variable object and ignores the Variable Value.
 - Add to Existing Value — If the Environment Variable object does not have a currently assigned value, then this operation functions identically to the New Value operation; otherwise, the specified Variable Value is added to the list of values for the Environment Variable object.
- Variable Value – Indicates the value for the Environment Variable object, such as the fully qualified path (directory) for a PATH environment variable.

After you [assign](#) operations to an Environmental Variable object, then optionally, you can configure the operations, which means to specify when the operations are to start and end.

To assign Environmental Variables policies

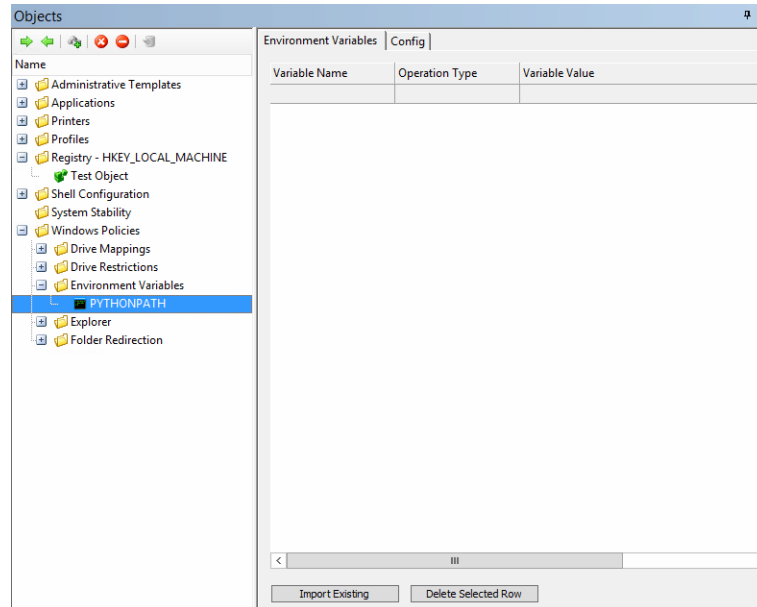
1. Do one of the following:
 - If you are modifying an existing Environmental Variable object, then in the Objects pane, under Windows Policies, select the appropriate Environmental Variable object.
 - If you are assigning a new Environmental Variable object to a profile, then in the Objects pane, under Windows Policies > Environmental Variables, create a new Environmental Variable object, and then name the object, for example, PYTHONPATH.



To review how to add objects in the Simplify Console, see [“Managing Objects” on page 52](#).

The Policy object form opens. The form has two tabs: the Environmental Variables tab, and the Config tab. The Environmental Variables tab is the open tab.

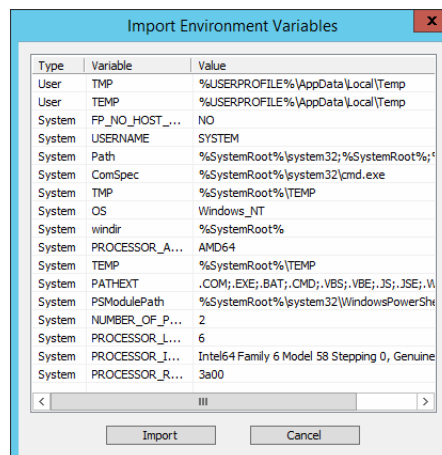
Figure 3-6: Policy object form, Environmental Variables tab



- At the bottom of the Environmental Variables tab, click Import Existing.

The Import Environmental Variables dialog box opens. This dialog box lists all the current environmental variables that you can configure for your users' profiles. Note that the type of environmental variable (User or System) is not included as part of the imported information. Instead, you specify this value on the Config tab for the variable, and this means that you can change the type for a variable. For example, if you import a System environmental variable for your users' profiles, but you select User Logon/Logoff when configuring the variable, then the variable is set as a User environmental variable.

Figure 3-7: Import Environmental Variables dialog box



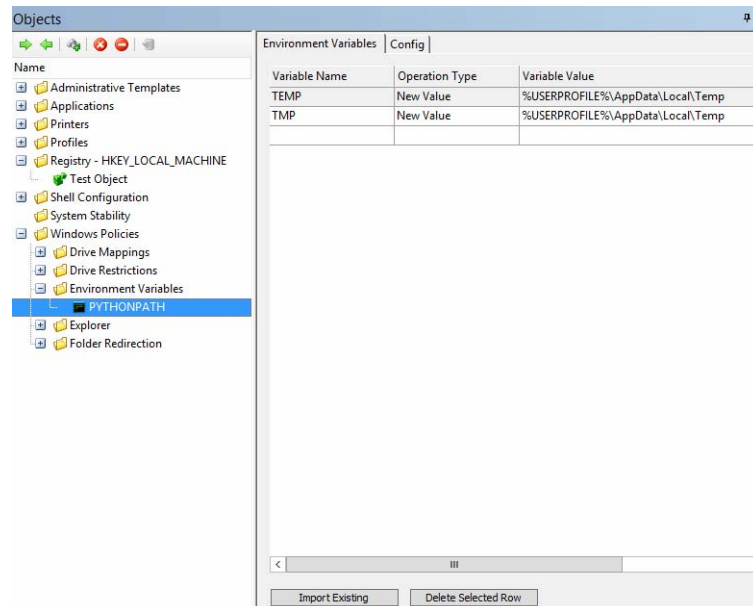
3. On the Import Environmental Variables dialog box, select the environmental variable or CTRL-click to select the multiple variables that are to be imported and configured for your users' profiles, and then click Import.

The imported variables are displayed on the Environmental Variables tab. By default, the Operation Type is set to New Value. A blank row is also displayed for adding a new environmental variable for the Environmental Variable object. Each variable represents an operation that is to be carried out for the selected Environmental Variable object.



To delete an imported variable, select it, and then click Delete Selected Row.

Figure 3-8: Imported variables for an Environmental Variable object



4. Do the following as appropriate for the Environmental Variable object:
 - Modify any of the attributes (Name, Type, or Value) for the imported variables.
 - Click in the blank line and specify the attributes for a new environmental variable.



Every time you add a new environmental variable, a new blank line is displayed for adding another variable. You can continue to add as many new variables as required.

5. If the assigned operations are to start and end based on user logon and logoff respectively, then assign the Environment Variable object to the appropriate owner; otherwise, continue to [“Configuring Assigned Environmental Variable Operations” on page 172](#).



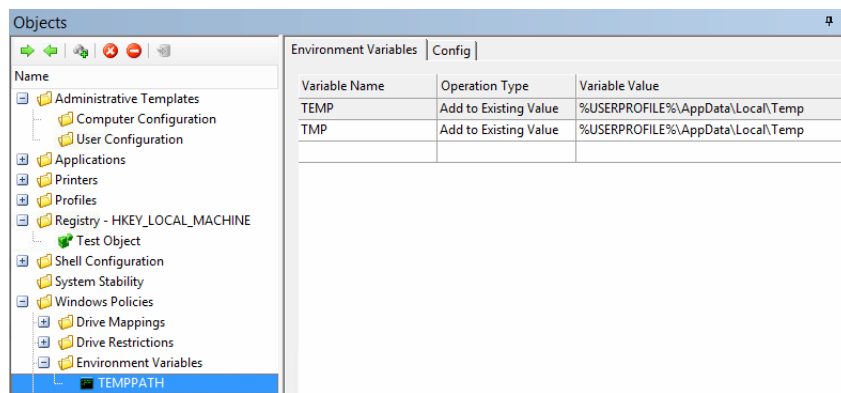
To review how to assign objects in the Simplify Console, see [“Managing Assignments” on page 58](#).

Configuring Assigned Environmental Variable Operations

After you assign operations to an Environmental Variable object, then optionally, you can [configure](#) the operations, which means to specify when the operations are to start and end. By default, all assigned operations are configured to start at user logon and end at user logoff. You can leave this configuration as-is, or you can modify the configuration to start when a user logs on *or* when the user logs on and the user reconnects to a terminal session and to end when a user logs off a terminal session *or* when the user logs off and the user disconnects from the terminal session.

If multiple operations have been assigned to an Environmental Variable object, you cannot configure each assignment individually. Instead, only a single configuration is applicable for all the operations that are assigned to the object. For example, as shown in [Figure 3-9](#) below, two file operations have been assigned to the TEMPPATH object: TEMP and TMP. You cannot configure different start and end “triggers” for the two operations, such as user logon/user logoff for the TEMP variable operation and session reconnect/disconnect for the TMP variable operation. Instead, a single configuration, *either* user logon/user logoff *or* session reconnect/disconnect applies to both variable operations.

Figure 3-9: Multiple file operations for an Environmental Variable object



To configure assigned registry or user file/folder operations

1. In the Objects pane, under Policies > Environmental Variables, select the appropriate Environmental Variable object.

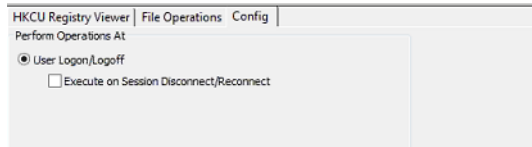
The Policy object form opens. The Environmental Variables tab is the open tab. The operations that are currently assigned to the object are displayed on the tab. See [Figure 3-8 on page 170](#).

2. Open the Config tab.

By default, Perform Operations At is set to User Logon/Logoff. If this configuration option is selected, then beginning operations occur when a user logs on to a terminal session and ending operations occur when a user logs off the terminal session. You can leave

this default value as-is, or you can also select Execute on Session Disconnect/Reconnect to have the configuration to start when a user logs on or when the user logs on and the user reconnects to a terminal session and to end when a user logs off a terminal session or when the user logs off and the user disconnects from the terminal session.

Figure 3-10: Policy object form, Config tab



3. Assign the Environment Variable object to the appropriate owner.



To review how to assign objects in the Simplify Console, see [“Managing Assignments” on page 58](#).

Assigning Explorer Restrictions Policies

You can [assign](#) an Explorer Restriction policy object to provide an easy approach for applying basic restrictions to Windows Explorer and Internet Explorer.



The restrictions that are available for an Explorer Restriction object are common to Terminal Server installations and are recommended by Microsoft for a locked down terminal server environment. You can use HKCU registry sets to assign additional restrictions to an Explorer Restriction object.

To assign Explorer Restrictions policies

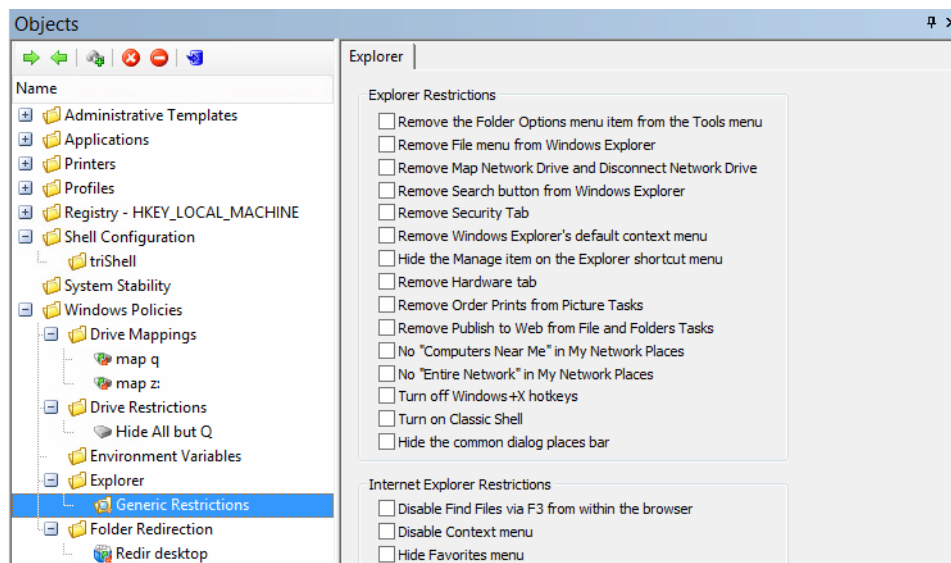
1. Do one of the following:
 - If you are modifying an existing Explorer Restriction object, then in the Objects pane, under Windows Policies, select the appropriate Explorer Restriction object.
 - If you are assigning a new Explorer Restriction object to a profile, then in the Objects pane, under Windows Policies > Explorer, create a new Explorer Restriction object, and then name the object, for example, Generic Restrictions.



To review how to add objects in the Simplify Console, see [“Managing Objects” on page 52](#).

The Policy object form opens. The Explorer tab is the only tab.

Figure 3-11: Policy object form, Explorer tab



2. Assign the appropriate restrictions to the Explorer Restriction object.

Restriction	Description
Explorer Restrictions	
Remove the Folder Options menu item from the Tools menu	Removes the Folder Options item from all Windows Explorer menus and from the Control Panel.
Remove File menu from Windows Explorer	Removes the File menu from My Computer and from Windows Explorer.
Remove Map Network Drive and Disconnect Network Drive	Prevents users from connecting and disconnecting to network drives with Windows Explorer and removes the corresponding menu options.
Remove Search button from Windows Explorer	Prevents users from searching for applications from Windows Explorer.
Remove Security Tab	(Windows Server 2003) Removes the Security tab from Windows Explorer.
Remove Windows Explorer's default context menu	Removes the shortcut menu from Windows Explorer.
Hide the Manage item on the Explorer shortcut menu	Removes the option that opens the Computer Management MMC snap-in from Windows Explorer.
Remove Hardware tab	Removes the Hardware tab from Mouse, Keyboard, Sounds and Audio Devices in the Control Panel and from the Properties dialog box for all local drives.
Remove Order Prints from Picture Tasks	(Windows Server 2003) Removes the "Order Prints Online from Picture Tasks" link in the My Pictures Folder.
Remove Publish to Web from File and Folders Tasks	(Windows Server 2003) Removes "Publish this file to the Web," "Publish this folder to the Web," and "Publish the selected items to the Web from File and Folder" tasks in Windows Explorer.
No "Computers Near Me" in My Network Places	Removes computers in the user's domain from lists of network resources in Windows Explorer and My Network Places.
Turn off Windows+X hotkeys	(Windows Server 2003) Turns off Windows+X hotkeys, such as Windows+R for the Run dialog box or Windows+E for Windows Explorer.
Turn on Classic Shell	Removes the Active Desktop and Web view features. This results in a user interface that looks and operates like the interface for Windows NT 4.0.
Hide the common dialog places bar	Removes the shortcut bar from the common Open File dialog box.
Internet Explorer Restrictions	
Disable Find Files via F3 from within the browser	Disables the use of the F3 key to search in Microsoft Internet Explorer and Windows Explorer.

Restriction	Description
Disable Context menu	Prevents the shortcut menu from opening when users click the right mouse button while using Internet Explorer.
Hide Favorites menu	Prevents users from adding, removing or editing Favorite links.

3. Assign the Explorer Restriction object to the appropriate owner.



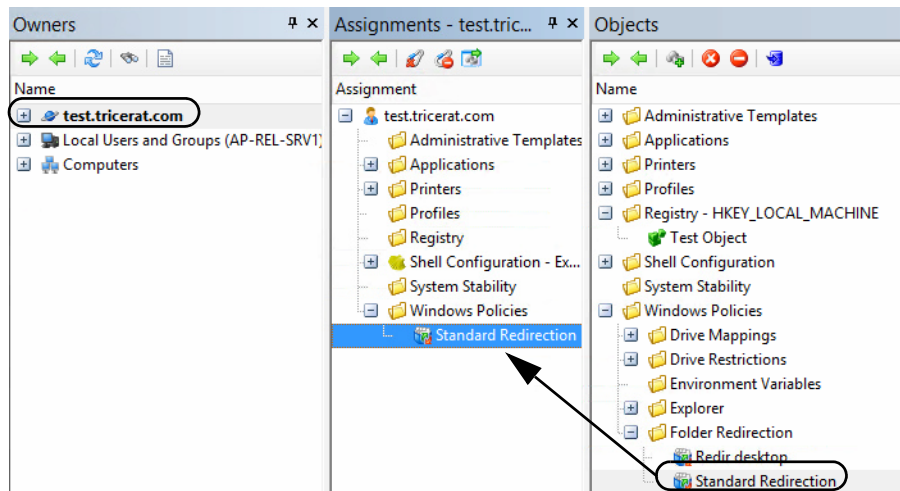
To review how to assign objects in the Simplify Console, see [“Managing Assignments” on page 58](#).

Assigning Folder Redirection Policies

A *Folder Redirection* policy object in Simplify Profiles provides an easy method to redirect user shell folders to a network location, giving users access to the file portion of their profiles without compromising logon and logoff speeds.

You can [assign](#) a Folder Redirection policy to any Windows profile to provide a centralized and incorruptible Documents and Settings folder for the user. For example, in [Figure 3-12](#) below, the Folder Redirection object has been applied at the Domain level, which means that all folder for every user on every Simplify Profiles server are redirected.

Figure 3-12: Folder Redirection object assigned to owner



Because redirected folders are no longer copied to each machine that the user logs on to, but instead are accessed over the network, you can use Folder Redirection policies in conjunction with Roaming profiles to improve logon and logoff speeds. You can also use Folder Redirection policies in conjunction with Mandatory profiles. In this case, the purpose of the policy is to provide a method to retain user files even after logoff, which typically cannot be done with Mandatory profiles.

A Folder Redirection policy object can be one of the following types:

Type	Description
Always Available Windows-specific folders	
Cookies	Location of Internet Explorer Cookies and index.dat. The index.dat file functions as a repository of redundant information, such as web URLs, search queries, and recently opened files. All auto complete functions are also stored in the index.dat file. if your users use Internet Explorer, then you should redirect this folder.
Desktop	Location of desktop shortcuts, files and folders. Note: This Desktop folder refers to the Desktop folder that Windows Explorer uses, and redirection has it no effect if the user shell is triShell.
Favorites	Location of users' Internet Explorer Favorites. Redirecting this folder ensures your users that their Internet Explorer Favorites are backed up.

Type	Description
History	Location of users' Internet Explorer history. Redirecting this folder ensures your users that their browsing histories are retained.
Documents	Location of users' Documents folders, which stores the users' work files such as word processing documents, spreadsheets, and other third party vendor files.
Recent	Location of a user's Recent Documents directory, which is a Window directory that auto-generate shortcuts to the users' most recently accessed files and folders. Note: This directory can be published to a user's triShell Desktop.
Start Menu	Stores the shortcuts and program groups that make up a user's Start Menu. If you redirect this folder, then a user can take advantage of the Windows Pin to Start Menu feature. Note: This Start Menu folder refers to the Start Menu folder that Windows Explorer uses, and redirection has no effect if the user shell is triShell.
Optional Windows-specific Folders (Might not be supported on all platforms)	
Cache	Stores the files that a user's browser has requested.
Downloads	Stores the files that a user downloads from the Internet.
Local App Data	Stores the application data that does not roam with the user. Usually this data is either machine-specific or too large to roam, for example, state information, settings, and data from applications such as custom dictionaries, toolbar settings, and other items that are not stored in the registry.
Music	The default Windows location for storing a user's music files based on the file type that Windows detects for a file, for example, files that a user downloads from iTunes.
Pictures	The default Windows location for storing a user's pictures/photographs based on the file type that Windows detects for a file.
Videos	The default Windows location for storing a user's video files based on the file type that Windows detects for a file.
Net Hood	Stores the path to the folder that contains all the shortcuts to servers that a user has added to My Network Places.
Print Hood	Stores the path to the folder containing shortcuts to printers that a user has added to the computer.
Programs	Stores all 64-bit applications that are installed on a user's client.
Send To	Stores the path to the SendTo folder, which contains all the shortcuts for the file sending options that are available on a user's client.
Startup	Stores the path to the folder that contains all the shortcuts to applications that launch automatically when a user logs on to a client. Some applications automatically add shortcuts to this folder, and the user can also manually add shortcuts to the folder.
Templates	Stores Microsoft Word templates that a user creates on a client as well as the Normal.dot template.

If you implement a Folder Redirection policy for your users, then at a minimum, the root folder must have NTFS permissions of Full Control for Creator/Owner, Full Control for local system, and List and Create Folder for the users with folders in this location. The share must have Full Control for the users with shell folders in this share. Finally, each user's redirected

folder requires Full Control for the user and Full Control for the local system.



In large environments, Tricerat recommends that you work with Security Administrators to find a solution that optimizes security without compromising a user's environment.

To assign Folder Redirection policies

When configuring the path for Folder Redirection object, you must enter the path name in UNC format. If a folder is not to be redirected, then do not edit the default path that is displayed for it on the Policy object form and do not select the folder for redirection. System variables are allowed in a folder redirection path. To keep each user's folders separate then, configure the redirection path with the appropriate system variables. For example, to redirect each user's Desktop folder, configure the path as:

\\server\profiles\%USERNAME%\Desktop

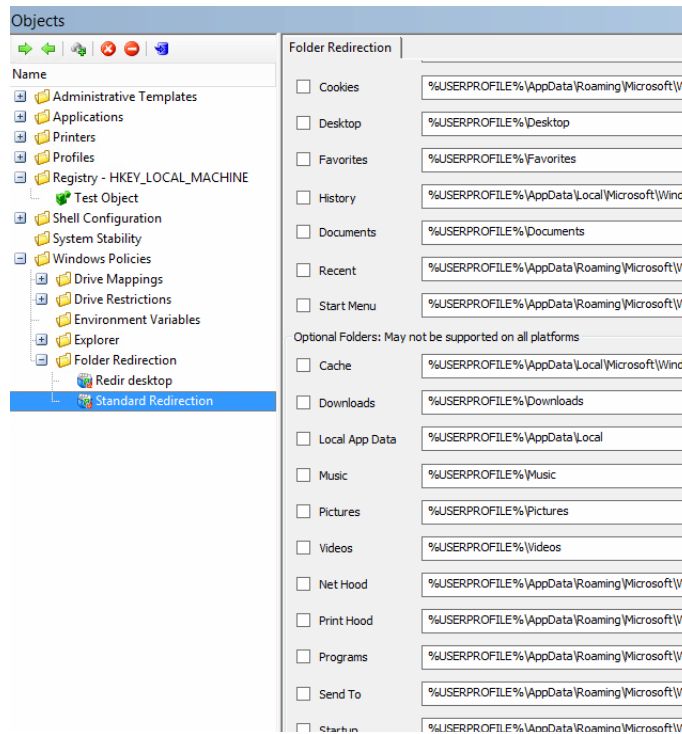
1. Do one of the following:
 - If you are modifying an existing Folder Redirection object, then in the Objects pane, under Windows Policies, select the appropriate Folder Redirection object.
 - If you are assigning a new Folder Redirection object to a profile, then in the Objects pane, under Windows Policies > Folder Redirection, create a new Folder Redirection object, and then name the object, for example, Standard Redirection.



To review how to add objects in the Simplify Console, see ["Managing Objects" on page 52](#).

The Policy object form opens. The Folder Redirection tab is the only tab. See [Figure 3-13 on page 180](#).

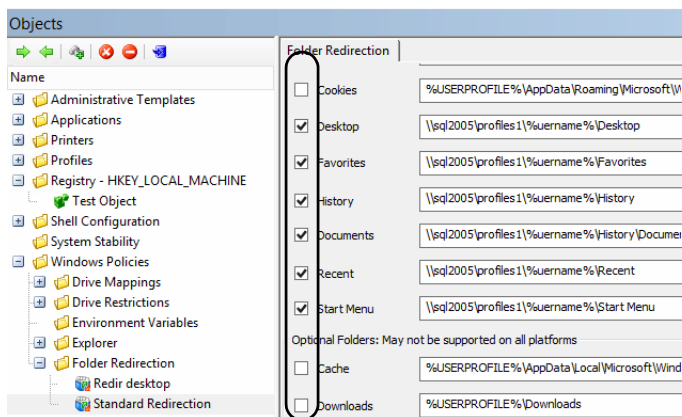
Figure 3-13: Policy object form, Folder Redirection tab



- For each folder that is to be redirected, enter the appropriate redirection path in UNC format, and then select the folder for redirection.

In Figure 3-14 below, the Cookies folder, the Cache folder, and the Downloads folder have not been redirected.

Figure 3-14: Policy object form showing redirected folders



- Assign the Folder Redirection object to the appropriate owner.



To review how to assign objects in the Simplify Console, see [“Managing Assignments”](#) on page 58.

Chapter 4

Managing Administrative Template Objects in Simplify Profiles

Administrative templates provide an option for the Simplify Suite administrator to tailor and maintain policy objects above and beyond the five policy object types (Drive Mappings, Folder Redirections, and so on) that are available through the Simplify Console. This chapter details the creation, configuration, and management of Administrative Template objects for your Simplify Suite environment.

This chapter covers the following topics:

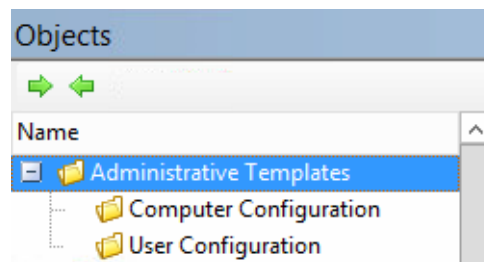
- [“Administrative Templates Overview” on page 181.](#)
- [“The Administrator Template Object Editor User Interface” on page 182.](#)
- [“Assigning Administrative Template Objects” on page 185.](#)

Administrative Templates Overview

The Simplify Suite provides administrative template support from within the Simplify Console for servers that are running NT6 (Windows 7, Windows 8, Windows 10, Server 2008, Server 2008 R2, Server 2012, Server 2012 R2, and Server 2106). Similar to the Windows Policy objects, administrative templates allow Simplify Suite administrators to edit the registry through a GUI; however, because each Windows Policy object type must be individually configured and maintained through the Simplify Console, only the five most common types of Windows Policy objects are available – Drive Mappings, Drive Restrictions, Environmental Variables, Explorer Restrictions, and Folder Redirections. Administrative templates, on the other hand, are loaded from a folder that is located outside of the Simplify Console and that contains ADMX files (known as native policies) that provide access to hundreds of different types of policies. These ADMX files tell the Simplify Console how to build the interface that Simplify Suite administrators use to create the Administrative Templates objects. These Administrative Template objects function just like any other Simplify Suite object, which means that administrators can use these objects to create, edit, and manage policies, and assign these policies to specific users and/or groups.

Two types of Administrator Template objects are available: *computer-level objects* and *user-level objects*. Computer-level objects can be assigned only to computers and their administrative templates are assigned at computer startup. User-level objects can be assigned only to users or groups, and their administrative templates are assigned at user logon.

Figure 4-1: Administrative Template objects in the Simplify Console



The Administrator Template Object Editor User Interface

The Administrative Templates editor in the Simplify Console uses the same store locations as the ADMX files. The central store is located at

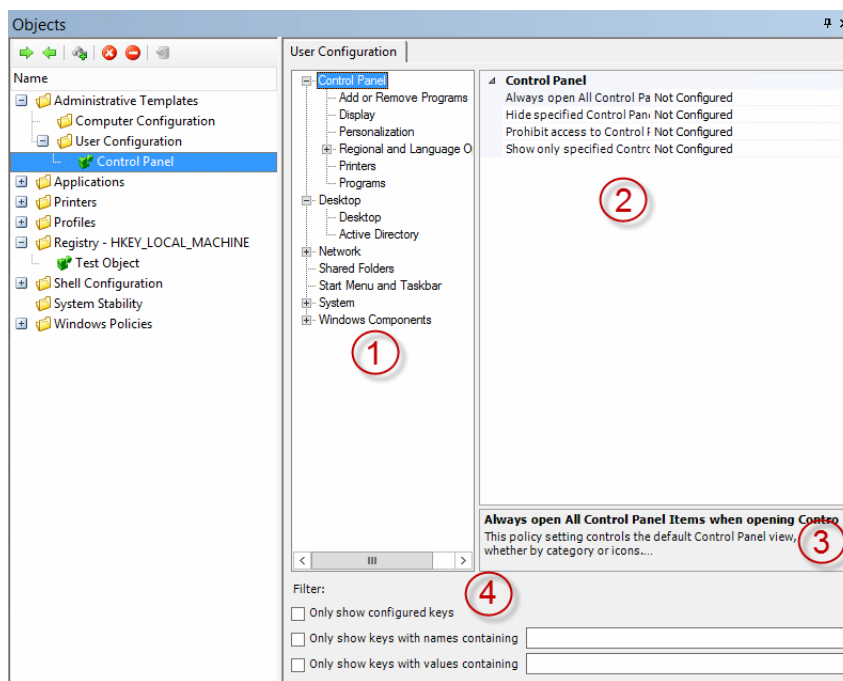
`%logonserver%\sysvol%\%userdnsdomain%\policies\PolicyDefinitions`

The Administrative Templates Object Editor pulls in the existing templates from the central store and displays them in Simplify Console in a custom interface that is designed to facilitate the creation of Administrative Template objects.



A local store is also available at `%systemroot%\PolicyDefinitions`, which allows you to edit ADMX files that are found only on the local computer; however, Tricerat strongly recommends that you use the central store for production purposes so that all Simplify Suite administrators who are in your organization's Active Directory can edit, assign, and manage Administrative Template objects.

Figure 4-2: Simplify Console user interface for Administrator Template objects



Sometimes, the Administrative Template Object Editor does not display at all in the Simplify Console. To force a refresh and display the editor, select an object or object type that is not an Administrative Template object, and then select the Administrative Template object again. For details about the Simplify Console user interface for Administrator Template objects, see [Table 4-1 on page 183](#).

Table 4-1: Simplify Console user interface for Administrator Template objects

Item	Description
1	Template Key pane – Displays all the keys that are available for an Administrative Template object. You can filter the keys for an Administrative Template object to determine what settings (values) have been configured for the object. See Item #4 .
2	Key Value pane – Displays the list of available values for the selected key. Three standard values are always available for a key: Enabled, Disabled, or Not Configured (the default value). Custom properties can be specified for a key Note: For information about specifying custom properties for a policy setting, see “Custom properties for an administrative template key” below.
3	Key Description pane – Displays a brief description about the selected Key as well as the effect of enabling the selected key.
4	Key Filter pane – Provides filtering options to determine what keys have been configured for a selected Administrative Template object. The Filter function hides the keys that do not meet the specified filter criteria <i>and</i> that do not have any child keys that meets the specified criteria.

Custom properties for an administrative template key

Three standard settings are always available for a template key value: Enabled, Disabled, or Not Configured (the default value). *Some* keys also allow for the support of advanced administrative template features called *custom properties*. These custom properties provide options for more input types than a single value for a key. These additional values can be specified for a key through the dynamic addition of text fields, dropdown lists, list boxes, check boxes, and so on. These dynamic GUI elements are initially disabled, but are enabled after the affected key is enabled. Multiple GUI elements can be displayed for a key as shown in [Figure 4-3](#) below, where both a list box and a check box are available for the key Allow Delegating Default Credentials. See [Table 4-2 on page 182](#) for a description of the indicated custom properties.

Figure 4-3: Custom properties for a template key

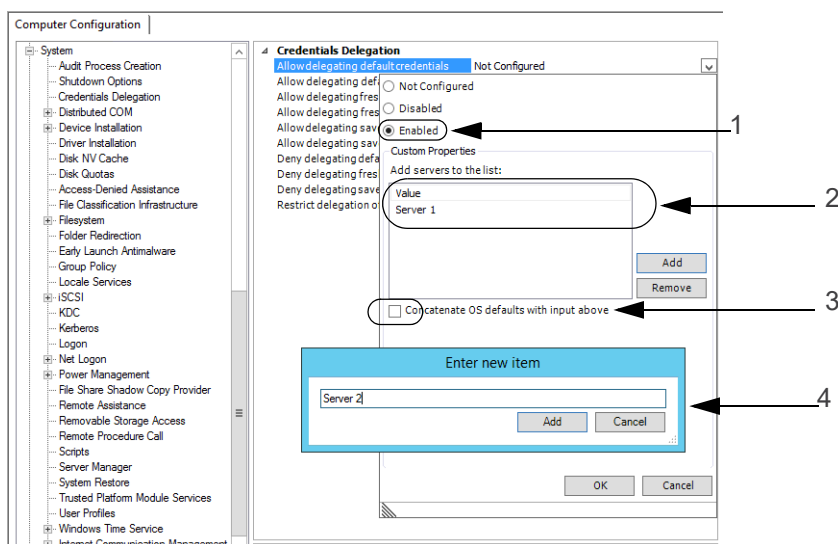


Table 4-2: Custom properties for a template key

Item	Description
1	Enabled settings for the Credentials Delegation policy
2	List box
3	Check box
4	Specifying list box values

Assigning Administrative Template Objects

When you are configuring the keys for an Administrative Template object, you can Enable a value for a template key or you can Disable a value for a template key. By default, the value for a template key is always set to Not Configured. Before you configure the keys for an existing Administrative Template object, you can filter the keys to determine which keys have already been enabled or disabled, or which keys have not yet been configured. After you correctly configure the keys, you can then **assign** the Administrative Template object to an owner.

To assign Administrative Template objects

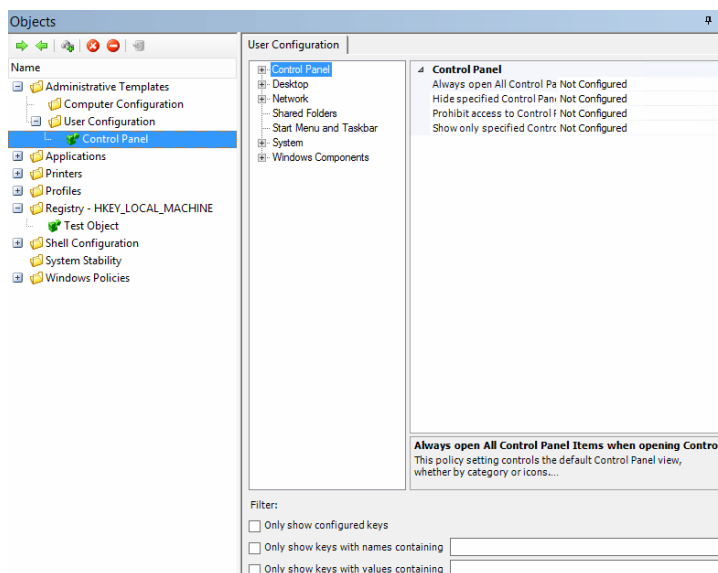
1. Do one of the following:
 - If you are modifying an existing Administrative Template object, then in the Objects pane, under Administrative Templates, select the appropriate Computer Configuration or User Configuration object.
 - If you are assigning a new Administrative Template object to a profile, then in the Objects pane, under Administrative Templates > Computer Configuration or User Configuration, create the new Administrative Template object, and then name the object, for example, Control Panel.



To review how to add objects in the Simplify Console, see [“Managing Objects” on page 52](#).

The Administrative Template object form opens. Depending on the object type that you created, either the Computer Configuration tab or the User Configuration tab is the open tab.

Figure 4-4: Administrative Template object form, User Configuration tab



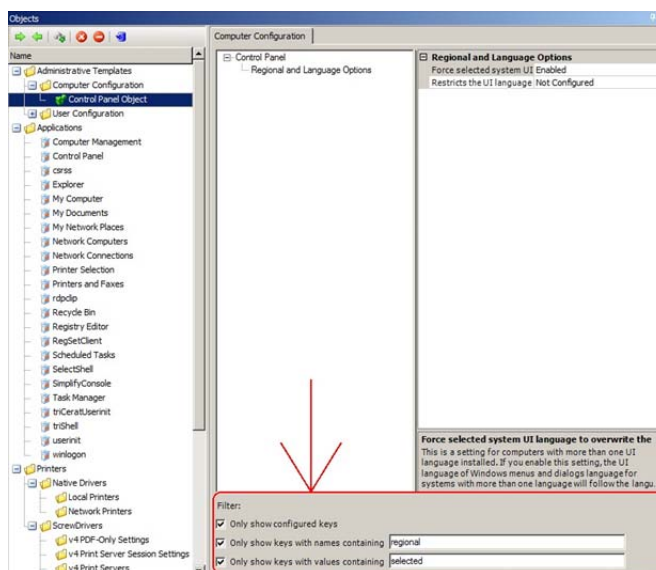
- If you are adding a new Administrative Template object, then continue to [Step 3](#); otherwise, if you selected an existing Administrative Template object, then optionally, to confirm the keys that have already been configured for it, in the Key Filter pane, specify the appropriate filters.



The display of the Template Key pane is dynamically updated based on the criteria that you specify in the Key Filter pane. You might have to expand the tree structure of the Template Key pane to view the keys that meet your filter criteria. The key filters are an “AND” search. A key must meet all the filter criteria to be displayed in the Template Key pane.

- Only show configured keys - Select this option to hide all the keys for which the value is set to Not Configured. In [Figure 4-5](#) below, Regional and Language Options is displayed because it has a value, Force selected system UI, set to Enabled.
- Only show keys with names containing - Select this option and then enter the appropriate search string in the text field to hide all keys that do not have the search string anywhere in their values. The search string is not case-sensitive and it can be found anywhere in the key value. For example, in [Figure 4-5](#) below, Regional and Language Options is displayed because **Regional** is found in the key name.
- Only show keys with value containing - Select this option and then enter the appropriate search string in the text field to hide all keys that do not have the search string in at least one of their values. For example, in [Figure 4-5](#) below Regional and Language Options is displayed because **selected** is part of name for the value Force selected system UI.

Figure 4-5: Example Filter results



- In the Template Key pane, select the key that is to be configured for the template.

4. In the Key Value pane, do one or both of the following for each value that is to be configured for the key:
 - Specify the settings for the key value (Enabled or Disabled). You can also leave a key value set to Not Configured.
 - If applicable, specify the custom properties for the key value.
5. Repeat [Step 3](#) and [Step 4](#) until you have configured all the necessary keys and values for the Administrative Template object.
6. Assign the Administrative Template Object to the appropriate owner.



To review how to assign objects in the Simplify Console, see [“Managing Assignments”](#) on page 58.

Chapter 5

Simplify Profiles Tools

Simplify Profiles has several tools that complement its technology and can assist you in giving your users a customized computing environment.

This chapter covers the following topics:

- [“The RegDiff Tool” on page 189.](#)
- [“The triReg Tool” on page 193.](#)
- [“Simplify Migration Utility” on page 197.](#)

The RegDiff Tool

You **use** the RegDiff tool to determine the areas within the registry that are modified when a setting is changed during a user's session. From this information, you can determine which registry keys and/or values require Save/Restore operations and which registry keys and/or values require Set operations to give your users a customized computing environment.

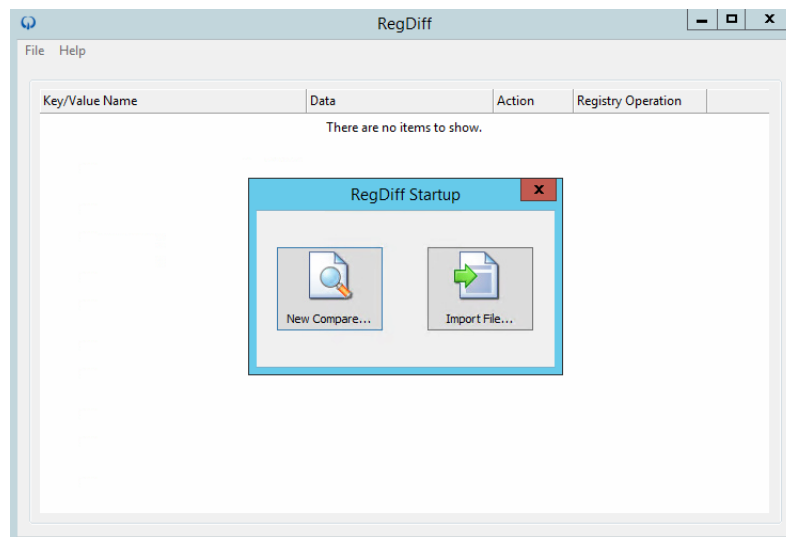
RegDiff works by comparing either the HKEY_CURRENT_USER or the HKEY_LOCAL_MACHINE registry hives and displaying any changes. You can make new registry operations based on these changes and then create a new Registry object. You can also **use** the RegDiff tool to track registry changes made during a user's session, and then create a file based on these changes that can be imported in to the RegDiff tool for creating Registry objects.

To use the RegDiff tool to create registry objects

1. Start the RegDiff tool with one of the following options:
 - Directly from Program Files\Tricerat\Simplify Profiles\RegDiff.exe.
 - On the Simplify Console main menu, select Tools > External > RegDiff.

The RegDiff tool opens. the RegDiff Startup dialog box is open on top of the main window for the tool. The dialog box displays options for carrying out a registry comparison.

Figure 5-1: RegDiff tool



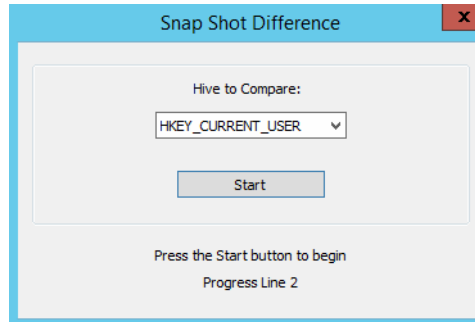
2. To start a new registry comparison, click New Compare.



If you close the RegDiff Startup dialog box, then to start a new comparison, on the RegDiff tool main menu, click File > New Compare.

A Snap Shot Difference dialog box opens. This dialog displays options for selecting the type of comparison that is to be carried out.

Figure 5-2: Snap Shot Difference dialog box



3. Select the hive that is to be compared: HKEY_CURRENT_USER (the default value) or HKEY_LOCAL_MACHINE, and then click Start.

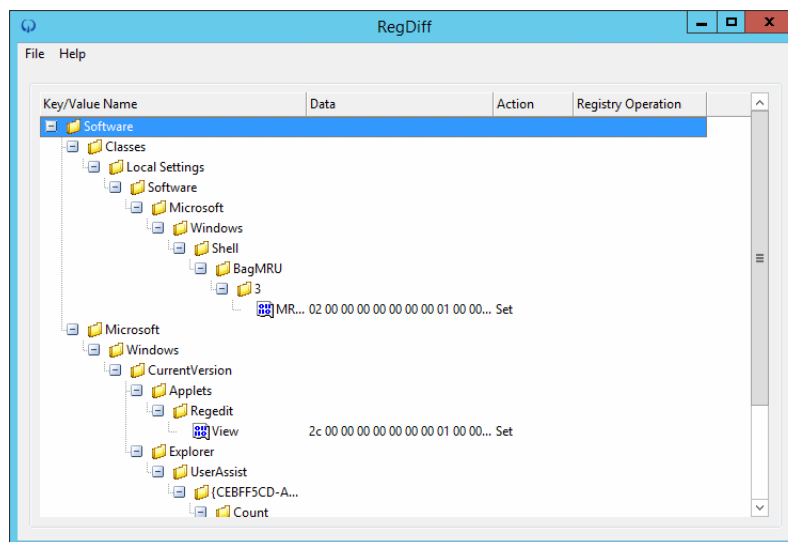
A snapshot of the selected hive is taken, and the dialog box is updated with a prompt to perform software operations that affect the registry.

4. Carry out the various software operations that affect the registry, and then return to the RegDiff tool, and on the Snap Shot Difference dialog box, click Done.

A second snapshot of the selected hive is taken, and then the first and second snapshots are compared. Any changes that have taken place between these two snapshots are displayed in the main window for the RegDiff tool.

Figure 5-3 below shows an example of a recorded change. In this example, when a user logs on and opens Internet Explorer, the Home page is changed from about:blank to www.Tricerat.com.

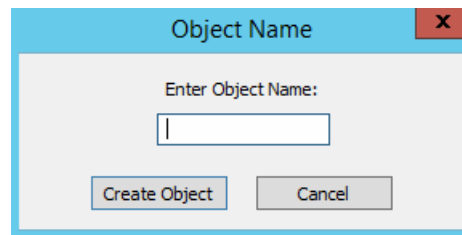
Figure 5-3: RegDiff Tool example results



5. For each registry key or value for which an operation is to be assigned do the following: Right-click the key or value, and on the context menu that opens, select the appropriate operation: Set This Value, Delete This Value, or Save/Restore This Value.
6. After you have assigned all the appropriate operations, on the RegDiff tool main menu, click File > Create Registry Object.

The Object Name dialog box opens. See

Figure 5-4: Object Name dialog box



7. Enter the name for the new Registry object, and then click Create Object.

The new Registry object with all the assigned operations from [Step 5](#) is created and stored in the Simplify database.

8. Do one of the following to view the new object in the Simplify Console:
 - Log out of the Simplify Console, and then log back on.
 - On the Simplify Console main menu, click File > Refresh Database.
9. Assign the Registry object to the appropriate owner.



To review how to assign objects in the Simplify Console, see [“Managing Assignments” on page 58](#).

To use the RegDiff tool to enable registry tracking

Simplify Profiles tracks registry changes that are made during a user's session. When a user logs on, Simplify Profiles takes an initial snapshot of the user's HKEY_CURRENT_USER hive. When the user logs off, another snapshot of the hive is taken, and then compared to the initial snapshot. The differences between the two snapshots are saved to a registry difference (.rdf) file that is [created](#) in a predefined directory. You can [import](#) this RDF file in to the RegDiff tool, and based on the changes that are recorded in the file, create the necessary registry objects for your users.

To create the RDF File

You can enable registry tracking on a per server basis. To do so, in RegEdit, you must create two registry values, and then place both these values in the following directory:

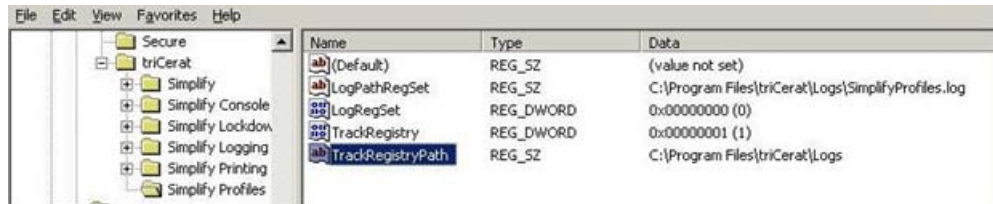
HKEY_LOCAL_MACHINE\Software\Tricerat\Simplify Profiles

- Registry value #1 is a REG_DWORD called TrackRegistry. To enable registry tracking,

set the data value to 1. To disable registry tracking, set the data value to 0.

- Registry value #2 is a REG_SZ (string) called TrackRegistryPath. You set the value to any valid path where the RDF file is to be created and stored. The valid path cannot include the RDF file name. The file name, instead, is automatically generated based on the user's name and the timestamp for the registry change, for example, alincoln_2016_13_164522.rdf.

Figure 5-5: Registry Tracking values



Continue to [“To import the RDF File”](#) below.

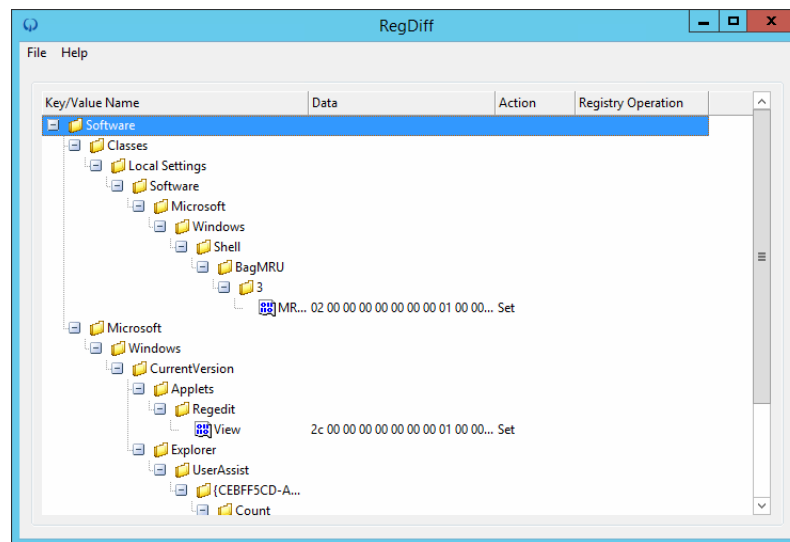
To import the RDF File

After the RDF file is generated, you can import the file in to the RegDiff tool.

1. On the RegDiff tool main menu, select File > Import, and then in the Open dialog box, browse to the folder that is specified in the TrackRegistryPath value and select the RDF file.

The registry changes that have been recorded in the RDF file are displayed in the main window for the RegDiff tool.

Figure 5-6: RegDiff Tool example results



2. You can now use the RegDiff tool to assign the registry operations and create the corresponding registry object. Begin at [Step 5 of “To use the RegDiff tool to create registry objects” on page 189.](#)

The triReg Tool

You use the triReg tool to view the registry values that have been saved to the Simplify Suite database for all the users that have Save/Restore data. The tool functions like Microsoft's RegEdit function. In addition to viewing the Save/Restore data that has been accrued with Simplify Profiles, you can use the tool to add, edit, and/or delete registry keys and values.

Unlike the RegDiff tool, however, the triReg tool is not a standalone tool. Instead, you can access the tool only through the Simplify Console. By default, when the Simplify Console first opens, the triReg tool is open, but the pane interface for the tool is hidden. Instead, the a triReg pane tab is docked in the upper left corner of the Simplify Console window. You must click on the pane tab to open the pane interface for the tool.


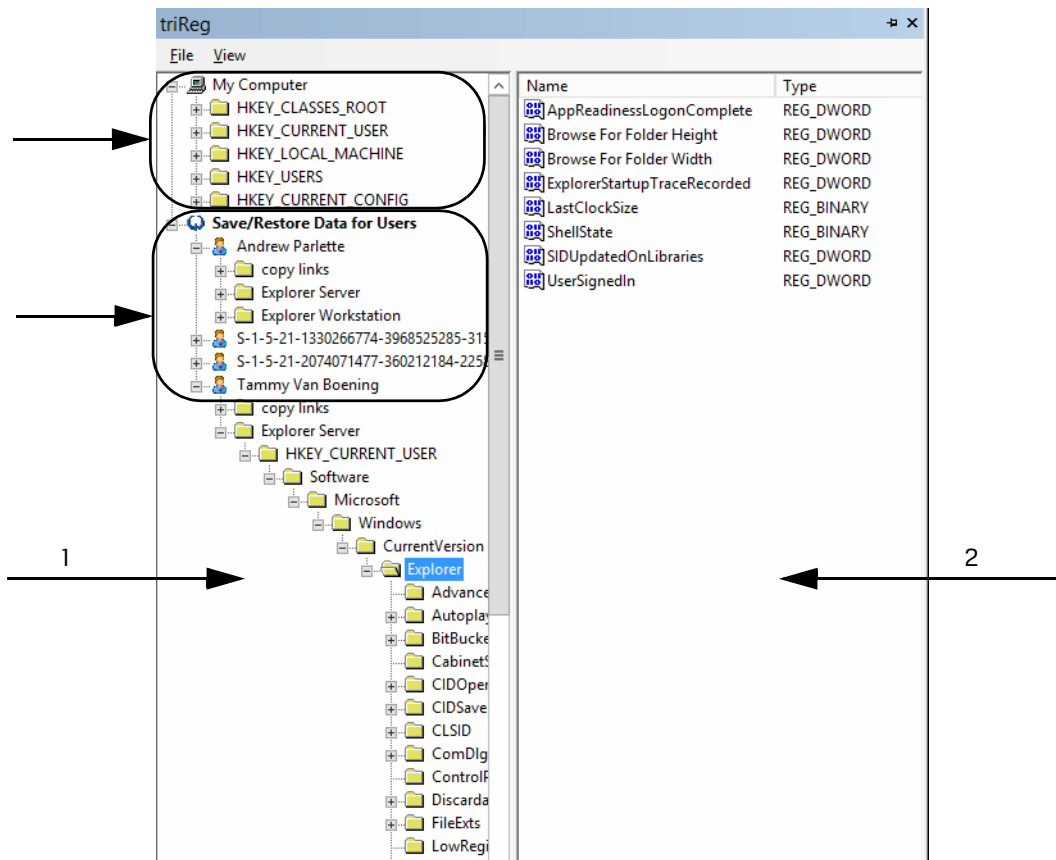
 *If the triReg tool is not displayed at any time in the Simplify Console, then on the Simplify Console main menu, click View > Reset Layout.*

Figure 5-7: triReg tool pane



Item	Description
1	Registry Data Display panes
2	Registry Data Operations pane

The triReg tool is divided into two vertical panes. The left pane is the Registry Data Display pane. This pane is divided into sections:

- My Computer section – The My Computer (top) section displays all the data that Microsoft’s RegEdit function displays. Through the tools’ main menu, this section also has many of the same standard features as Microsoft’s RegEdit function.

Main Menu Option	Menu Options
File	<ul style="list-style-type: none"> • Load Hive – Loads a registry profile into HKEY_USERS. • Unload Hive – Unloads a registry profile from HKEY_USERS. • Connect Network Registry – Connects to a remote computer’s registry.
View	<ul style="list-style-type: none"> • Filter Hives – Changes the visible registry hives in My Computer (HKEY_CLASSES_ROOT, HKEY_CURRENT_USER, HKEY_LOCAL_MACHINE, HKEY_USERS, HKEY_CURRENT_CONFIG). • Refresh Registry – Refreshes the My Computer registry data. • Refresh Save/Restore Data – Refreshed the Save/Restore Data for the triReg tool.

- Save/Restore Data for Users section – The Save/Restore Data for Users (bottom) section displays live Simplify Profiles registry data. To view this data, expand the list of users under Save/Restore Data for Users. (You might have to click View > Refresh Save/Restore Data to see the most current list of users.)



Remember, you can change the location of the triReg pane to better suit your working needs. See [“Customizing the Simplify Console Layout”](#) on page 24.

The right pane is the Registry Data Operations pane. You can do the following in this pane:

- Edit registry subkey values for Save/Restore data for a user. See [“Simplify Migration Utility”](#) below.
- Delete Save/Restore data for a user. See [“To delete Save/Restore data for a user”](#) on page 195.

To edit a registry subkey value for Save/Restore data for a user

1. In the Registry Data Display pane, expand the tree structure for the user’s Save/Restore Data to locate the registry object for which the subkey value is to be edited.

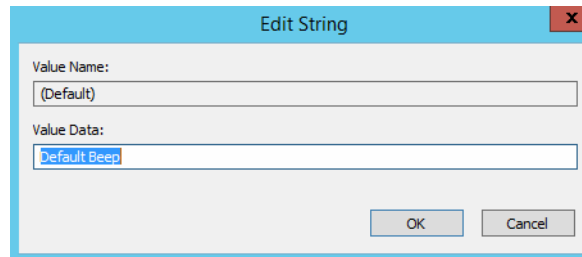


The data is located under the HKEY_CURRENT_USER entry for the user.

2. In the Registry Data Operations pane, double-click the appropriate registry sub-key.

The Edit < > dialog box opens, with the registry value type (string, word, and so on) is indicated in the title, for example, Edit String or Edit Word. The dialog box displays the current default value for the selected registry value. See [Figure 5-8 on page 195](#).

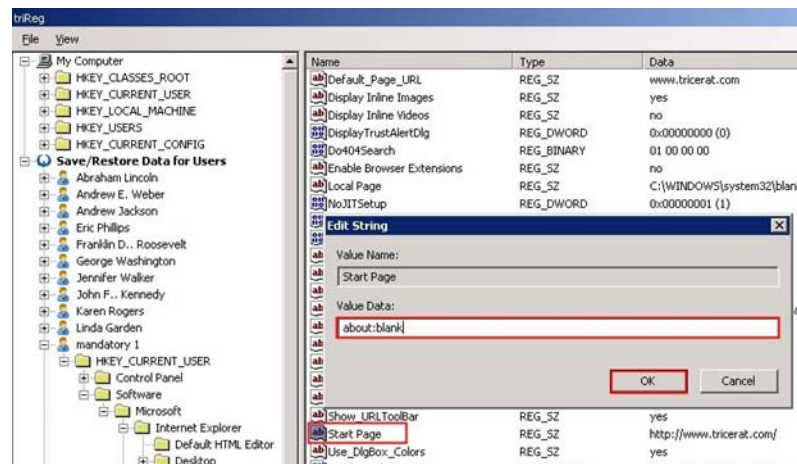
Figure 5-8: Edit String dialog box example



3. Edit the value as appropriate, and then click OK.

The Edit dialog box closes. The new value is displayed for the sub-key is displayed in the triReg too, and the data is immediately applied to the user's environment. For example, in Figure 5-9 below, the Internet Explorer Start Page for the user "mandatory 1" was changed to about:blank

Figure 5-9: Editing a registry subkey value for Save/Restore data for a user



To delete Save/Restore data for a user

You typically delete Save/Restore data for a user if the associated application has become corrupt. For example, Microsoft Outlook can easily be corrupted by third-party plugs-ins such as a virus protection program. In this situation, instead of deleting the user's entire profile, which is the standard solution for corrupted roaming profiles, you would delete the HKCU\Software\Microsoft\Outlook Save/Restore data. After you delete Save/Restore data for a user, the user must redefine the personalized settings.

To delete Save/Restore data for a user, do the following:

1. In the Registry Data Display pane, expand the tree structure for the user's Save/Restore Data to locate the data that is to be deleted.

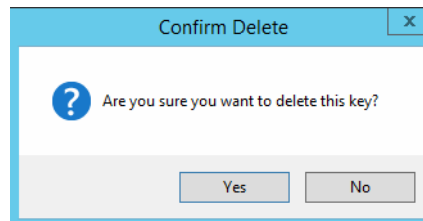


The data is located under the HKEY_CURRENT_USER entry for the user.

2. Right-click the Save/Restore Data that is to be deleted, and on the context menu that opens, click Delete.

A Confirm Delete message opens, asking you if you are sure that you want to delete the key.

Figure 5-10: Confirm Delete message



3. Click Yes.

The message closes. The key is immediately deleted for the user. The user must now the user must redefine the personalized settings for the environment.

Simplify Migration Utility

ProfileMigration.exe is the Simplify Migration Utility (SMU) executable. You [run](#) the SMU to migrate users from Roaming profiles to hybrid Simplify Profiles. Each Roaming profile for a user has the user's personalized settings which are integrated in to the Simplify database. You typically run the SMU as the final step to integrate Simplify Profiles into Roaming profile networks. This migration can be seamless for your end users without any critical downtime.



You can implement Simplify Profiles without using the Simplify Migration Utility, however this approach forces your end users to redefine their personalized settings.

The SMU integrates with your organization's Active Directory by finding users' Roaming profiles, and then simulating a logoff. As a result, all Simplify Profiles Save/Restore operations that are assigned save these keys to the Simplify database. The next time that a user logs in to a Simplify Profiles client, these same keys are restored in to the profile. With the Save/Restore data in the database, you can deploy Local or Mandatory profiles without compromising the user's personal settings. Instead, Simplify Profiles configures these settings and inserts them at the user's logon.



The following procedure is an example of migrating several Roaming profiles to Mandatory profiles. To verify that the Simplify Profiles Save & Restore operations handle the proper registry keys for the users' personal settings, Tricerat recommends that you first create a Mandatory profile, and then use the profile with a test account.

The HKCU Save\Restore operation shown in [Figure 5-11 on page 198](#) contains the following keys:

- Control Panel\Desktop key – Holds all the settings for the desktop, its appearance, and how the windows and menus react to user input.
- Software\Microsoft\Internet Explorer key - Contains all the settings for Internet Explorer.
- Software\Microsoft\Notepad key - Contains all settings for Notepad.



This key is rarely useful for users, but is ideal for testing Save & Restore functions.

- Software\Microsoft\Office\12.0 key - Contains all the settings for Microsoft Office Suite applications.
- Software\Microsoft\Windows NT\CurrentVersion\Windows Messaging Subsystem\Profiles key - Contains Windows Mail Profile, which is used by Microsoft Outlook and other email clients.

Figure 5-11: HKCU Save/Restore operation



As shown in Figure 5-12 below, the S/R Office 2007 object is assigned to the Roaming Profiles organizational unit (OU), which automatically inherits to the users. This policy saves the specified registry keys at logoff and restores the keys at logon.

Figure 5-12: Object assigned to Roaming Profiles OU



To run the Simplify Migration Utility

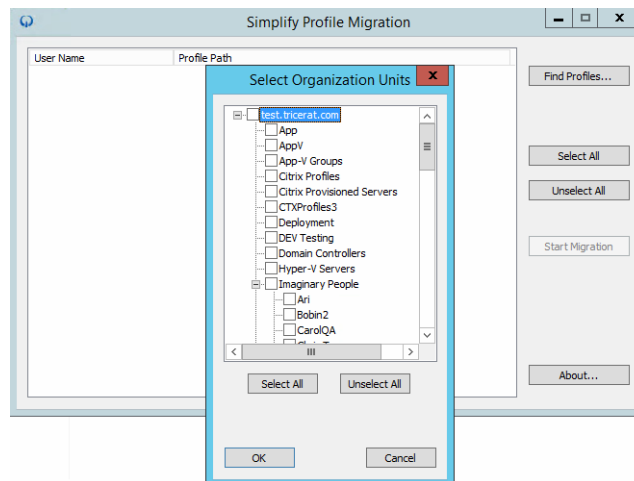
1. Run ProfileMigration.exe.



The executable is found in Program Files\Tricerat\Simplify Profiles\ProfileMigration.exe.

The Select Organization Units dialog box opens on top of the main window for the Simplify Migration Utility.

Figure 5-13: Select Organization Unit dialog box



- In the Select Organization Units dialog box, select the OUs that are to be searched for Roaming profiles, and then click OK. (In this example, the Roaming Profiles OU would be selected.)

The Select Organization Units dialog box closes. The main window for the Simplify Profile Migration Utility remains open. All Roaming profiles in the OUs that you selected are displayed in the window.



This action does not migrate the profiles. It simply searches for and displays the Roaming profiles.

Figure 5-14: Selecting OUs for Roaming profiles

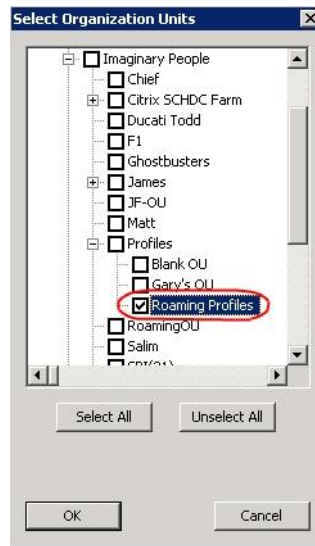
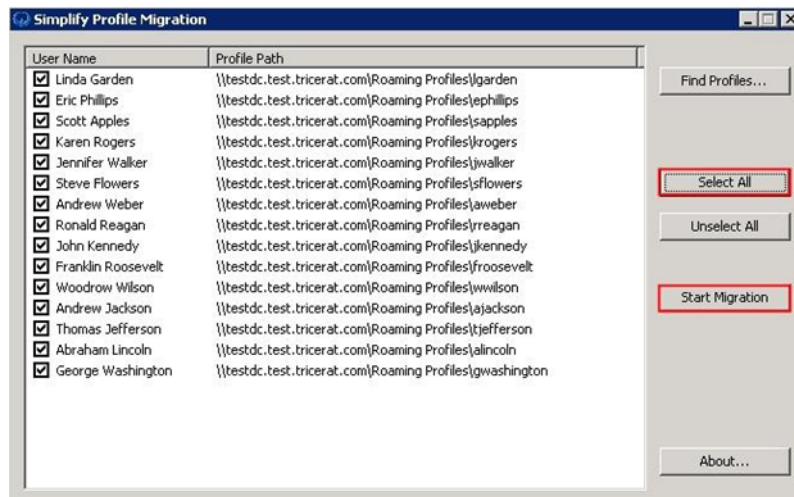


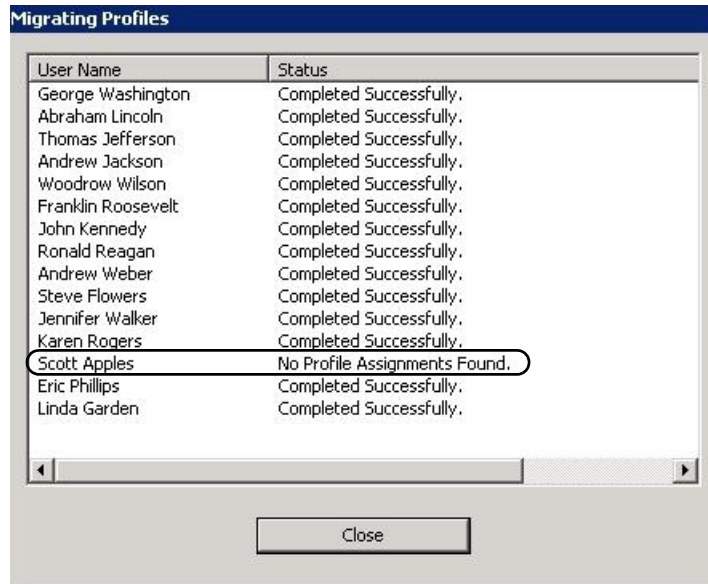
Figure 5-15: Roaming profiles in the selected OUs



3. Select the profiles that are to be migrated to Simplify Profiles, and then click Start Migration.

After the migrations are complete, the Migration Profiles dialog box opens. This dialog box displays all the Roaming profiles that were selected for migration and the status of the migration. (In this example, all profiles except that for Scott Apples, was successfully migrated.)

Figure 5-16: Migrating Profiles dialog box

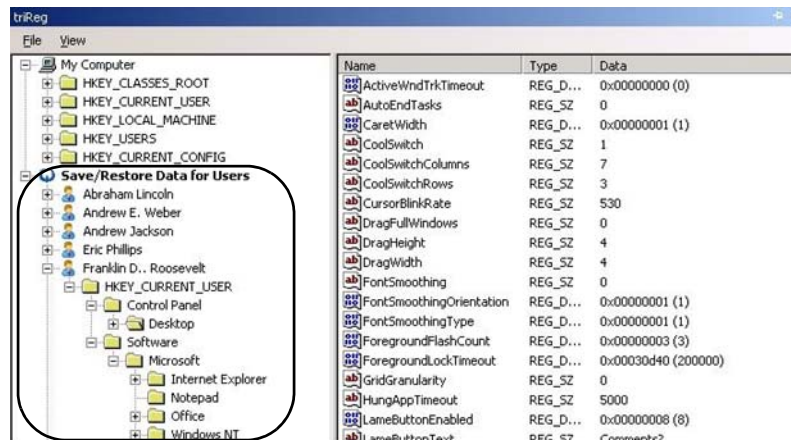


4. Use the triReg tool to access the migrated profiles.



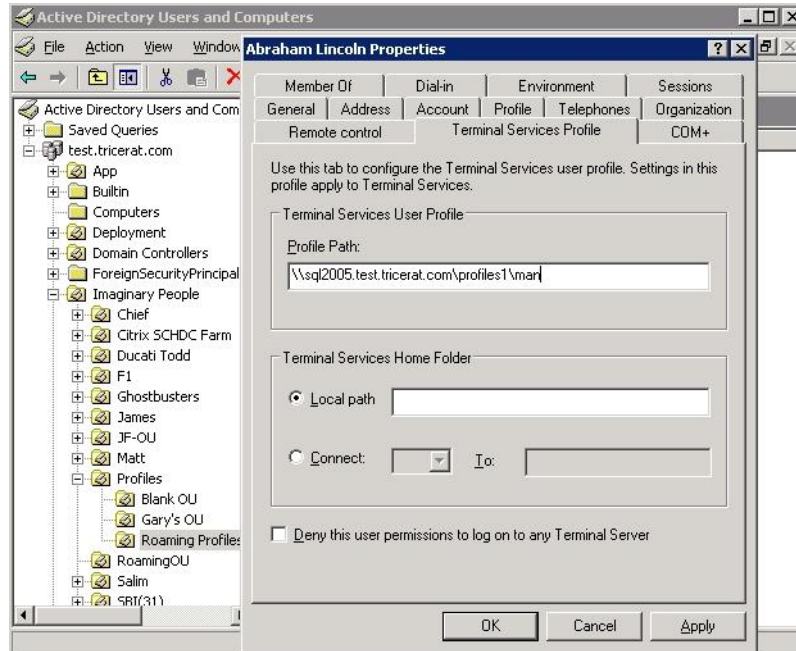
To view the profiles in the triReg tool, you might need to click View > Refresh Save/Restore Data on the triReg main menu.

Figure 5-17: Viewing migrated profiles in the triReg tool



5. Assign the Mandatory profile to the users.

Figure 5-18: Assigning Mandatory profile to users



Many options are available to assign the Mandatory profile to the users. In this scenario, the user's Terminal Services Profile has been changed to use the Mandatory profile. This is an appropriate configuration if you installed Simplify Profiles for a terminal services farm such as Terminal Server, Citrix, or VDI farm. If you are deploying Simplify Profiles for desktops, then set the Mandatory profile on the Profile tab.

Section 4

Simplify Driver Management

Section Contents

- [Getting Started with Simplify Driver Management on page 203](#)
- [Using Simplify Driver Management on page 207](#)

Chapter 1

Getting Started with Simplify Driver Management

Simplify Driver Management is a “server-less” printer driver management solution that is ideal for automatically managing multiple printers simultaneously in a desktop-only environment. You use Simplify Driver Management to import your organization’s printer drivers in to the Simplify database, regardless of where the driver is located (print servers, workstations, and so on). You can then configure a printer object based on a printer’s name, IP address, and driver, and assign this configuration to workstations, users, and/or groups. When a user logs in to a workstation (client or server), the assigned configurations are copied out of the database and the printers are installed normally. The user has full access to all the capabilities of every assigned printer, and print jobs are sent to a selected printer based on the printer’s IP address. This chapter provides a high-level overview of the Simplify Driver Management infrastructure. It also details how to install Simplify Driver Management.

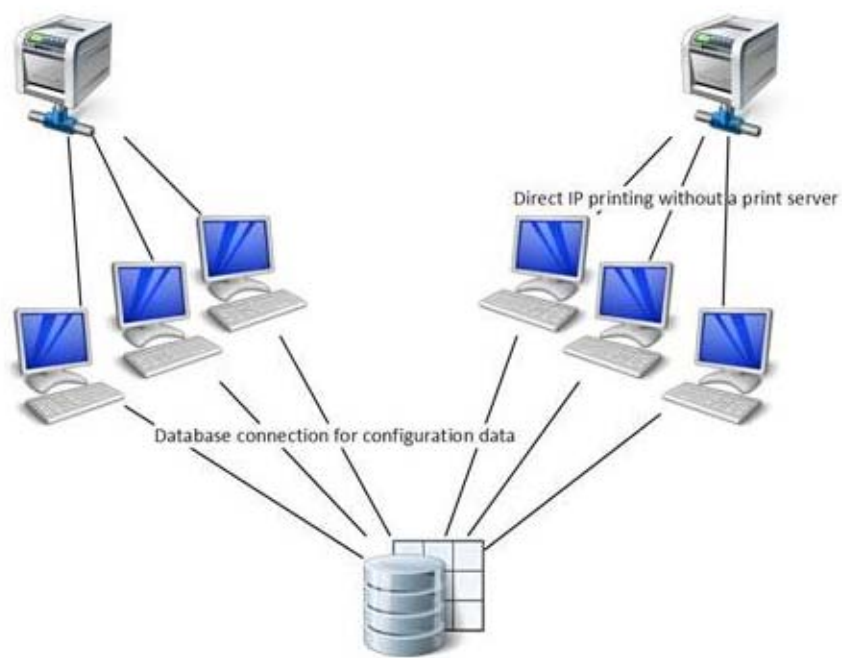
This chapter covers the following topics:

- [“Simplify Driver Management Infrastructure” on page 204.](#)
- [“Installing Simplify Driver Management” on page 205.](#)

Simplify Driver Management Infrastructure

Figure 1-1 below shows the most common and basic infrastructure for Simplify Driver Management. With your organization's printer drivers imported in to the Simplify database, you can then configure a printer object based on the printer's name, IP address, and driver, and assign this configuration to workstations, users, and/or groups. When a user logs in to a workstation (client or server), the assigned configurations are copied out of the database and the printers are installed normally.

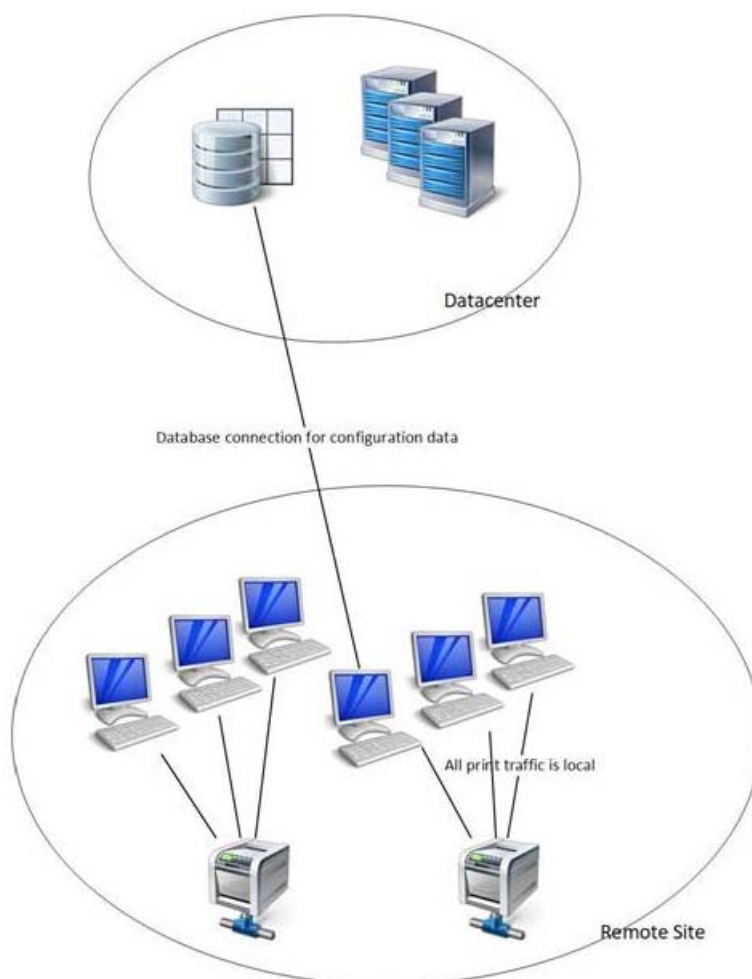
Figure 1-1: Simplify Driver Management infrastructure



Installing Simplify Driver Management

Simplify Driver Management (SDM) is installed as part of Simplify Suite. SDM has two unique components – the Simplify Driver Management Console, which provides the functions for importing all your organization’s printer drivers in to the Simplify database, and the Simplify Suite SDM component, which enables runtime creation of your user’s printers. Additionally, the common Simplify Suite console component, the Simplify Console, provides the functions for assigning your users’ printers to workstations, users, and/or groups. You must install the Simplify Driver Management Console on every workstation (client or server) that contains *unique* drivers that are to be imported in to the Simplify database. For example, if you have a small organization that does not have a print server and all six workstations have the same printer drivers installed, then you would install the Simplify Driver Management Console on just one of these workstations. You must install the Simplify Suite SDM component on *each* workstation on which a user’s printers are to be built. In this example then, you would install the Simplify Suite SDM component on all six workstations. [Figure 1-2](#) below illustrates the installation structure for SDM.

Figure 1-2: Installation structure for Simplify Driver Management



To install Simplify Driver Management

For instructions about installing Simplify Driver Management, see the *Simplify Suite Installation Guide*. When installing Simplify Driver Management, note the following:

- You must install the Simplify Driver Management Console on every workstation (client or server) that contains *unique* drivers that are to be imported in to the Simplify database.
- You must install the Simplify Suite SDM component on each workstation (client or server) on which a user's printers are to be built.
- You can install the Simplify Console where needed, for example, on the database server, on administrators' workstations, and so on.
- You can install the Simplify database on the same server as which the Simplify Console is installed, or on a different database server.
- You must specify the database credentials for logging in to the Simplify database.

Chapter 2

Using Simplify Driver Management

After you have installed all the necessary components for Simplify Driver Management, you can use the Simplify Driver Management Console to import all your organization's printer drivers in to the Simplify database, create the associated Printer objects, and then assign drivers to printers. You can then use the functions that are in the Simplify Console to assign these printers to workstations, users, and/or groups. This chapter details how to open the Simplify Driver Management Console and how to use this tool to import printer drivers in to the Simplify database, import printers in to the Simplify database to create the necessary Printer objects, and then assign drivers to printers. The chapter also details how to use the functions that are in the Simplify Console to assign these printers to your organization's workstations, users, and/or groups.

This chapter covers the following topics:

- [“Opening the Simplify Driver Management Console” on page 208.](#)
- [“The Simplify Driver Management Console Main Window” on page 210.](#)
- [“Routing Print Traffic with Simplify Driver Management” on page 212.](#)
- [“Managing Drivers and Printers in the Simplify Driver Management Console” on page 217.](#)
- [“Assigning Printers To Owners” on page 221.](#)

Opening the Simplify Driver Management Console

You can open the Simplify Driver Management Console from the workstation (client or server), or from a command window.

To open the Simplify Driver Management Console from the workstation

After the Simplify Driver Management Console has been installed on a workstation, a shortcut icon for the application is placed on the workstation's desktop. An option for Simplify Driver Management is also available from the Start menu. You can double-click the desktop icon to launch Simplify Driver Management, or you can select the option from the Start menu (Start > All Programs > Tricerat > Simplify Driver Management).

Figure 2-1: Simplify Driver Management Console desktop shortcut



After you launch Simplify Driver Management Console, the Simplify Driver Management Console main window opens as a standard GUI. See [“The Simplify Driver Management Console Main Window” on page 210](#).

To open the Simplify Driver Management Console from a Command window

When you open the Simplify Driver Management Console from a Command window, you have the option of opening the console normally (the Simplify Driver Management Console main window opens), or opening the Simplify Driver Management Console silently. If you open the Simplify Driver Management Console silently, then the Simplify Driver Management Console main window does not open. Instead, the Simplify Driver Management Console runs the printer Bonjour service silently to discover network printers, and then imports all network printers that have yet to be imported in to the Simplify database. A managed printer object is created for each printer with the relevant name and IP address in the Simplify database. All 32 bit and 64 bit drivers remain unassigned as does each printer object.

1. Open a Command window.
2. Navigate to the installation directory for Simplify Driver Management.



The default installation directory is `C:\Program Files\Tricerat\Simplify Suite\Simplify Driver Management Console`.

3. At the command line prompt, do one of the following:
 - To open the console normally, type the command “Simplify Driver Management Console” and then press [ENTER].
The Simplify Driver Management Console main window opens. See [“The Simplify Driver Management Console Main Window” on page 210](#).
 - To open the console silently, type the command “Simplify Driver Management Console” -auto, and then press [ENTER].



Make sure to include the quotes around Simplify Driver Management Console and place a space before the -auto command. See [Figure 2-2](#) below.

Figure 2-2: Opening Simplify Driver Management Console from a Command window

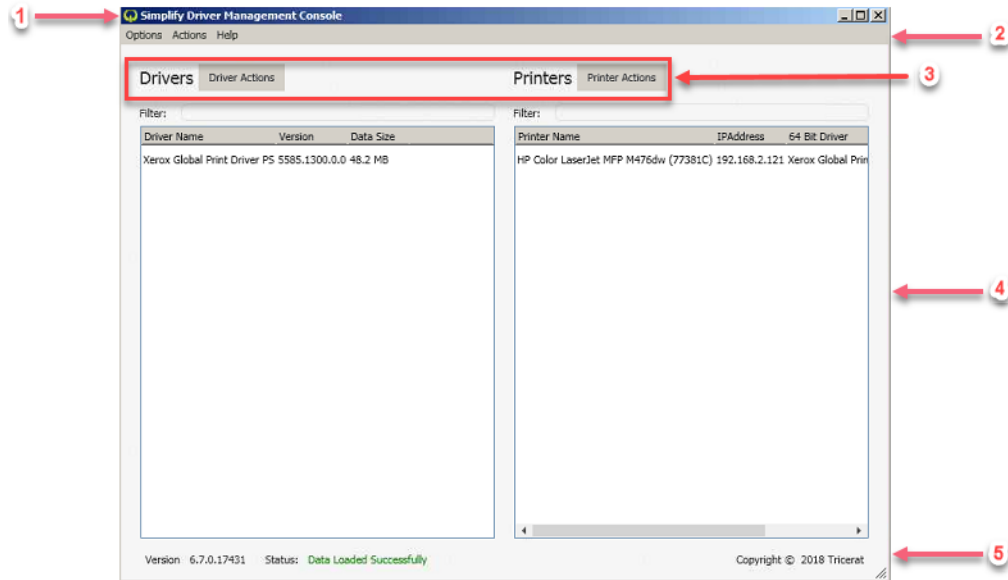
```
C:\Windows\system32\cmd.exe
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

C:\Users\mlonbardi>cd "C:\Program Files\Tricerat\Simplify Suite\Driver Management Console"
C:\Program Files\Tricerat\Simplify Suite\Driver Management Console>"Simplify Driver Management Console"
C:\Program Files\Tricerat\Simplify Suite\Driver Management Console>"Simplify Driver Management Console" -auto
```

The Simplify Driver Management Console Main Window

Figure 2-3 below shows the main window for the Simplify Driver Management Console.

Figure 2-3: Simplify Driver Management Console, main window



Option	Description
1	Title bar. Contains the standard Windows commands for minimizing, maximizing, and closing the window.
2	Main menu. See “Simplify Driver Management Console main menu” below.
3	Drivers and Printers menus. Contain the commands for managing your organization’s local printer drivers and network printers through the console.
4	Main work area. See “Simplify Driver Management Console main work area” on page 211.
5	Information bar. From left to right, displays the following information about the Simplify Driver Management Console: <ul style="list-style-type: none"> • Current version. • Application status. • Product copyright information.

Simplify Driver Management Console main menu

Figure 2-4: Simplify Driver Management Console main menu



From left to right, the Simplify Driver Management Console main menu contains the following

options: Options, Actions, and Help. [Table 2-1](#) below describes the menu commands.

Table 2-1: Simplify Driver Management Console main menu

Menu Option	Menu commands
Options	<ul style="list-style-type: none"> Hide Win32 Drivers —Selected by default. If you clear this option, then: <ul style="list-style-type: none"> All 32 bit drivers that are contained in the Simplify database are displayed in the Drivers pane. A 64 bit column is now displayed in the Drivers pane. A “Y” for Yes is displayed in the 64 bit column of the Drivers list for all 64 bit drivers and an “N” for No is displayed for all 32 bit drivers. A 32 bit Driver column is displayed in the Printers list. Hide Printers with Drivers—Not selected by default. Hides any printers from the Printers list for which a 32 bit or 64 bit driver has been assigned. <p>Tip: To help you focus on printers that need drivers assigned, you should select Hide Printers with Drivers.</p> <p>Note: Your selections are “sticky,” Any selection that you make remains in effect after you log out and then log back in to the Simplify Driver Management Console</p>
Actions	Refresh Data—Queries the Simplify database to refresh the display in the Drivers pane and the Printers pane.
Help	Contact Support—Opens the following webpage through which you can contact Tricerat support: https://www.tricerat.com/contact-support/ .

Simplify Driver Management Console main work area

The Simplify Driver Management Console main work area displays two distinct panes:

- Drivers pane: Lists all local printers drivers that have been imported in to the Simplify database.
- Printers pane: Lists all Bonjour-discovered network printers that have been imported in to the Simplify database.

A Filter field that you can use to filter the lists to specific drivers or printers is displayed above each pane. To filter a list, enter a search string in the appropriate field. The search string is limited to the exact order of the characters in the string; however, the string is not case-sensitive and the search string can be found anywhere in the search results. For example, when filtering the Drivers list, the search string **ps** returns both Microsoft **XPS** Document Writer v4 and TP Output Gateway **PS**. For drivers, the search is carried out across the Driver Name and the Version, but not the Data Size. For the printers, the search is carried out across the Printer Name and IP Address, but not the assigned drivers.

Routing Print Traffic with Simplify Driver Management

Using Simplify Driver Management Console to route printing traffic for your organization's workstations consists of the following in the order listed:

- Importing local printer drivers in to the Simplify database. See [“To import local printer drivers in to the Simplify database”](#) below.
- Importing network printers in to the Simplify database. See [“To import network printers in to the Simplify database”](#) on page 214.
- Assigning drivers to the printers. See [“To assign a driver to a printer”](#) on page 215.
- Assigning the printers to owners. See [“Assigning Printers To Owners”](#) on page 221.

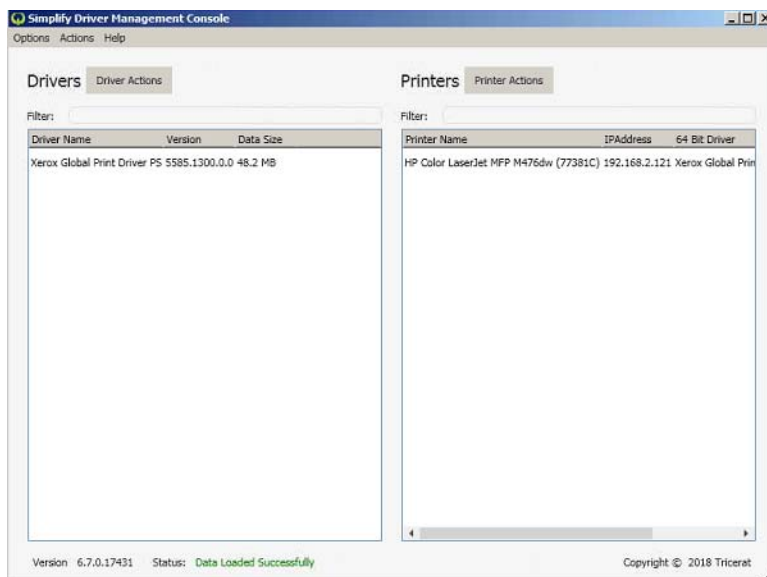
To import local printer drivers in to the Simplify database



You must repeat the following procedure for each workstation (client or server) that has unique drivers that are to be imported in to the Simplify database.

1. Log in to the appropriate workstation (client or server), and then open the Simplify Driver Management Console.

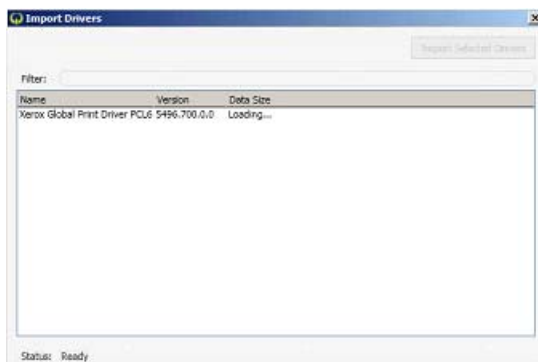
Figure 2-5: Simplify Driver Management Console, main window



2. On the Driver Actions menu, select Import Drivers.

The Import Drivers window opens. The window lists all the drivers that are local to the workstation (client or server) on which you are carrying out the import and that have yet to be imported in to the Simplify database. See [Figure 2-6 on page 213](#).

Figure 2-6: Simplify Driver Management Console, Import Drivers window



If the console detects local drivers that have already been imported in to the Simplify database, then these drivers are not displayed in the Import Drivers window.

3. Select a driver to import, or CTRL-click to select multiple drivers, and then click Import Selected Drivers.



The Filter function on the Import Drivers window works identically to the Filter function that is on the Simplify Driver Management Console main window.

The selected drivers are no longer displayed in the Import Drivers window. Instead, they are now displayed in the Drivers pane in the Simplify Driver Management Console main window.



You might have to click Actions > Refresh Data to refresh the list of drivers in the Drivers pane.

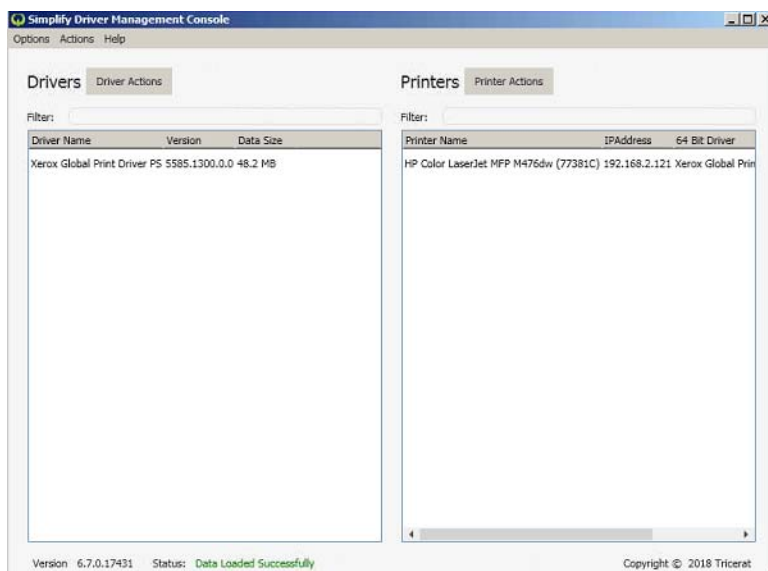
4. Close the Import Drivers window.
5. Continue to ["To import network printers in to the Simplify database" on page 214.](#)

To import network printers in to the Simplify database

When you import a network printer in to the Simplify database, a corresponding printer object is created in the Simplify database. The printer object has a Printer Name and an IP Address. After the printer object is created in the Simplify database, you can then assign the appropriate driver to the printer.

1. If you have not done so already, log in to the appropriate workstation (client or server), and then open the Simplify Driver Management Console.

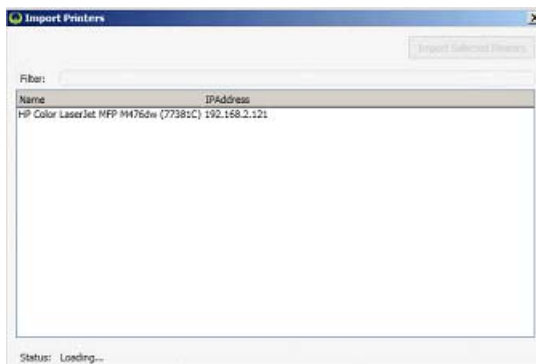
Figure 2-7: Simplify Driver Management Console, main window



2. On the Printer Actions menu, click Import Printers.

The Import Printers window opens. The window lists all the Bonjour-discovered network printers that are available to the workstation but have yet to be imported in to the Simplify database.

Figure 2-8: Simplify Driver Management Console, Import Printers window





If the console detects any Bonjour-discovered printers have already been imported in to the Simplify database, then these printers are not displayed in the Import Printers window.

3. Select a printer to import, or CTRL-click to select multiple printers, and then click Import Selected Printers.



The Filter function on the Import Printers window works identically to the Filter function that is on the Simplify Driver Management Console main window.

The selected printers are no longer displayed in the Import Printers window. Instead, they are now displayed in the Printers pane in the Simplify Driver Management Console main window.



You might have to click Actions > Refresh Data to refresh the list of printers in the Printers pane.

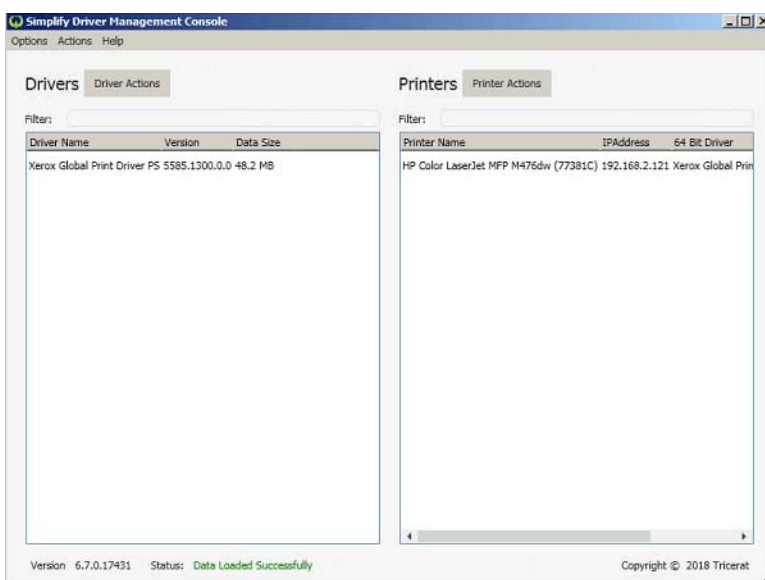
4. Close the Import Printers window.
5. Continue to [“To assign a driver to a printer”](#) below.

To assign a driver to a printer

You can select a single driver at a time to assign to one or more printers.

1. If you have not done so already, log in to the appropriate workstation (client or server), and then open the Simplify Driver Management Console.

Figure 2-9: Simplify Driver Management Console, main window



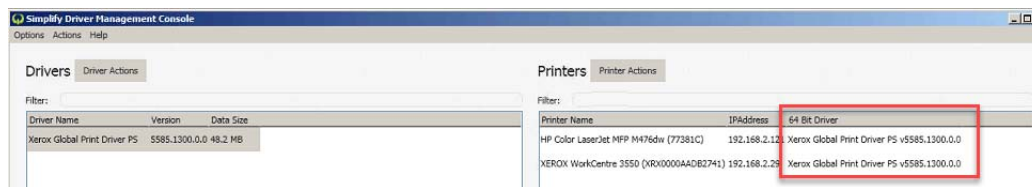


You can always use the Drag and Drop function to assign a single driver to a single printer at a time. Just drag the driver from the Drivers list to a printer in the Printers list.

2. In the Drivers pane, select the printer driver that is to be assigned to a network printer.
3. In the Printers pane, select the network printer, or CTRL-click to select multiple printers, to which you are assigning the driver.
4. On the Printer Actions menu, click Assign Selected Driver.

The Printers pane display is updated to show the assigned driver information.

Figure 2-10: Assigned Printer Drivers



5. Continue to [“Assigning Printers To Owners”](#) on page 221.

Managing Drivers and Printers in the Simplify Driver Management Console

In addition to using the functions in the Simplify Driver Management Console to route your organization's printing traffic, you can use the Simplify Driver Management Console to do the following:

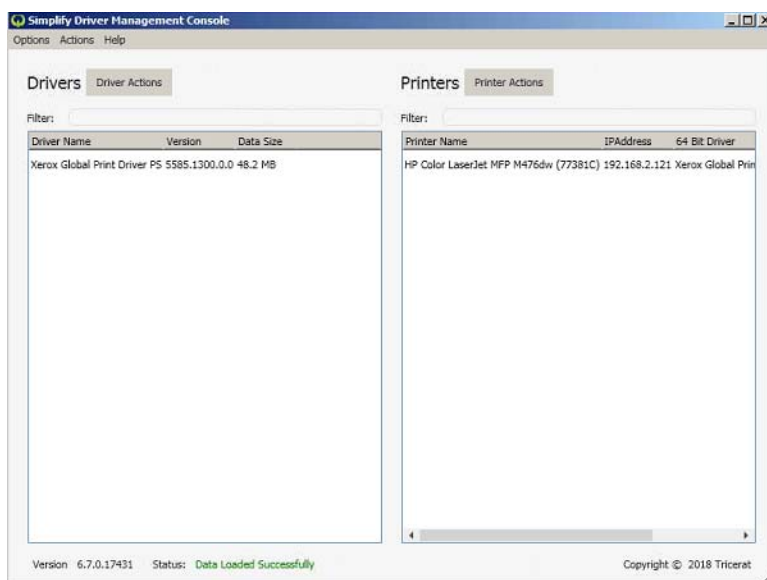
- Delete printer drivers from the Simplify database. See [“To delete printer drivers from the Simplify database”](#) below.
- Clear drivers from network printers. See [“To clear a driver from a printer”](#) on page 218.
- Delete printers from the Simplify database. See [“To delete a printer from the Simplify database”](#) on page 219.

When you delete a printer driver, clear a driver assignment, or delete a printer, any queues that were created with the driver are not deleted; however, the printer is no longer available after the affected user starts another session by logging off and then logging back on to the workstation.

To delete printer drivers from the Simplify database

1. Log in to any workstation (client or server) on which the Simplify Driver Management Console is installed, and then open the Simplify Driver Management Console.

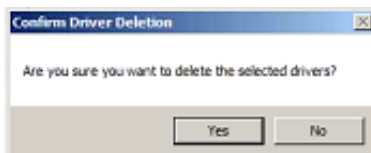
Figure 2-11: Simplify Driver Management Console, main window



2. In the Drivers pane, select the printer driver that is to be deleted, or CTRL-click to select multiple drivers, and then on the Driver Actions menu, click Delete Drivers.

A Confirm Driver Deletion message opens, asking you if you are sure that you want to delete the selected drivers.

Figure 2-12: Confirm Driver Deletion message



3. Click Yes.

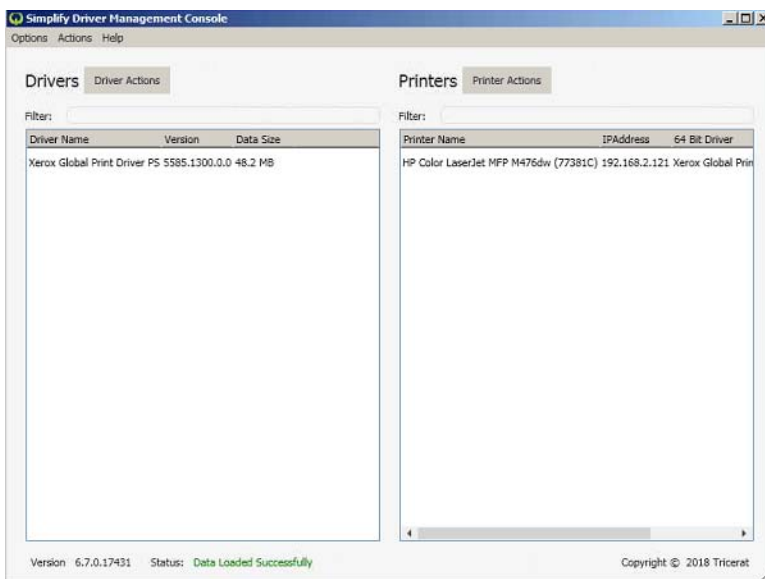
The Confirm Deletion message closes. The printer drivers are deleted immediately from the Simplify database and are no longer displayed in the list in the Drivers pane.

To clear a driver from a printer

When you clear a printer driver from a printer, the printer object is edited in the Simplify database; the driver is *not* deleted from the database.

1. Log in to the appropriate workstation, and then open the Simplify Driver Management Console.

Figure 2-13: Simplify Driver Management Console, main window

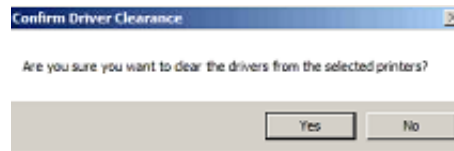


2. In the Printers pane, select the printer, or CTRL-click to select multiple printers, for which you are clearing the driver assignment.

3. On the Printer Actions menu, click Clear Drivers.

A Confirm Driver Clearance message opens, asking you if you are sure that you want to clear the drivers from the selected printers.

Figure 2-14: Confirm Driver Clearance message



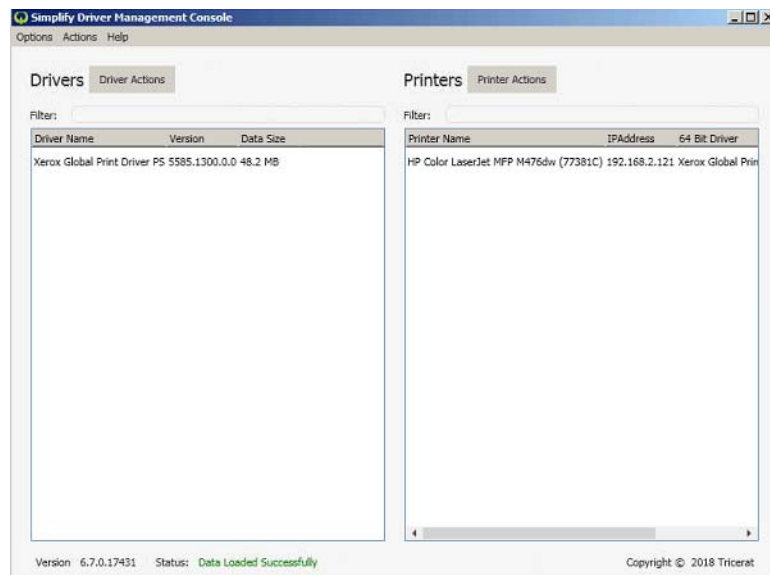
4. Click Yes.

The Confirm Driver Clearance message closes. The driver assignments are cleared for the selected printers.

To delete a printer from the Simplify database

1. Log in to the appropriate client, and then open the Simplify Driver Management Console.

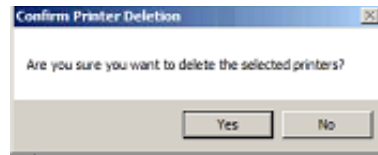
Figure 2-15: Simplify Driver Management Console, main window



2. In the Printers pane, select the printer, or CTRL-click to select multiple printers, that you are deleting from the Simplify database.
3. On the Printer Actions menu, click Delete Printers.

A Confirm Printer Deletion message opens, asking you if you are sure that you want to delete the selected printers. See [Figure 2-16 on page 220](#).

Figure 2-16: Confirm Printer Deletion message



4. Click Yes.

The Confirm Printer Deletion message closes. The printers are deleted immediately from the Simplify database and are no longer displayed in the list in the Printers pane.

Assigning Printers To Owners

The third step in setting up Simplify Driver Management is to assign the printers to owners. Assigning printers to owners allows owners to select the printers that are to be used during a Simplify Driver Management session. An owner can be a workstation, an individual user, or a group. When you assign a printer to an owner, you can assign it in one of three ways:

- **Admin Assigned** – Any printer that you assign to an owner as Admin Assigned is always built for the owner. The owner does not have the option of whether to build the printer, nor does the owner have the option of removing the printer from a Simplify Driver Management session. You should add print server printers to the Admin Assigned location to prevent an owner from being able to affect the building of specific printers. An owner always has the option of setting any Admin Assigned printer as the default printer for a session through the User Assigned Printers (UAP) application.
- **User Allowed** – If you assign a print server printer to an owner as User Allowed, then the owner can use the UAP application to add this printer to the list of printers that are to be built for the current Simplify Driver Management session. The owner can always delete and re-add the printer as needed.
- **User Assigned** – If you assign a print server printer to an owner as User Assigned, then this printer is automatically built during the owner's Simplify Driver Management sessions. If the owner does not want the printer to be built for any Simplify Driver Management session, then the owner can use the UAP application to delete the assignment. The printer is no longer built for the owner's Simplify Driver Management sessions and the owner *cannot* add this printer back to the list of printers that are to be built for a session.



For detailed information about UAP, see the Simplify User Assigned Printers Tool Quick Reference Guide.



You must repeat the following procedure in its entirety for each owner to which you are assigning printers.

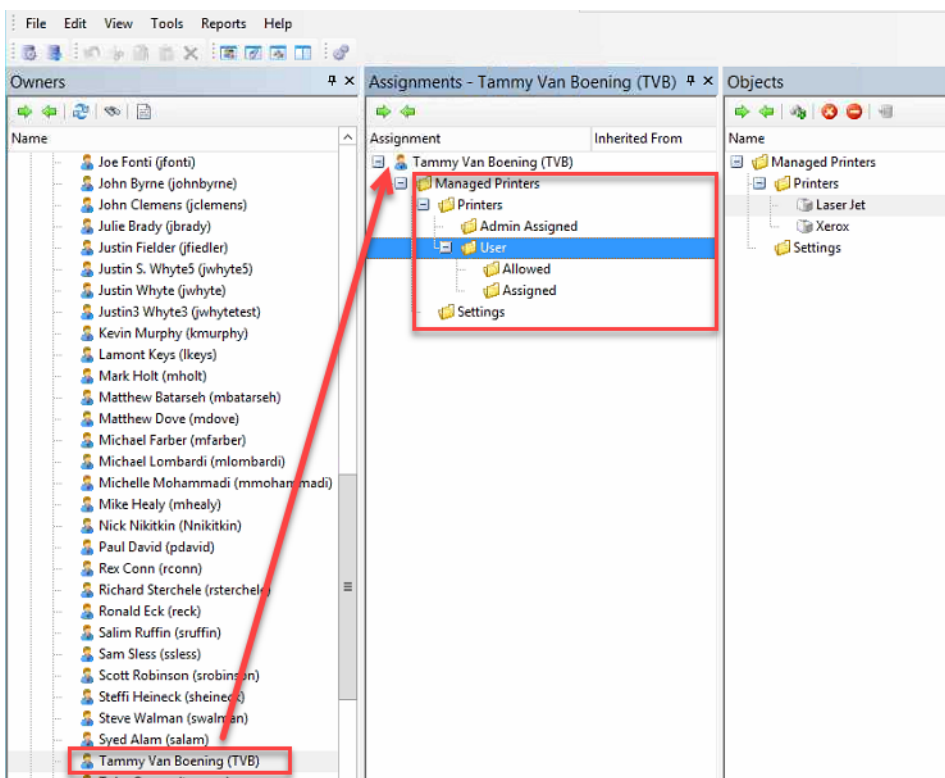
To assign printers to owners

1. In the Owners pane in the Simplify Console, select the owner (workstation, user, or group) to which the printer is to be assigned.

The selected owner is displayed at the top of the Assignment hierarchy in the Assignments pane.
2. In the Assignments pane, do the following:
 - To show Admin Assigned, expand Managed Printers > Printers.
 - To show User Allowed and User Assigned, expand Managed Printers > Printers > User.

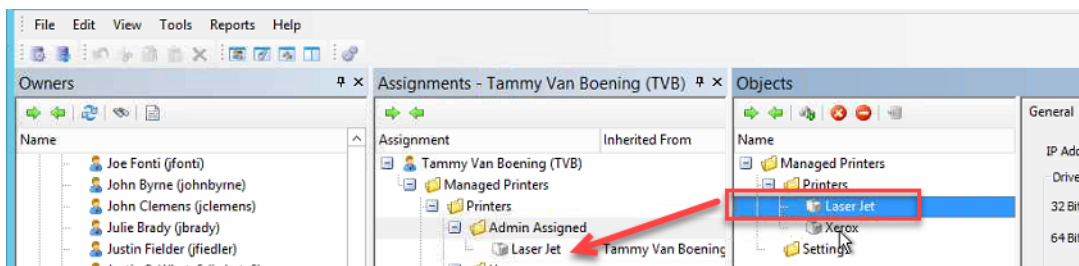
See [Figure 2-17 on page 222](#).

Figure 2-17: Printer assignment locations in the Simplify Console



3. For each printer that is to be assigned to the selected owner, do the following: From the Objects pane, drag the appropriate Printer object to one of the three assignment folders: Admin Assigned, User Allowed, or User Assigned.

Figure 2-18: Assigning printers in the Simplify Console



If you assign any User Allowed printers to an owner, then either you or the owner must log in to the Simplify User Assigned Printers Tool and build the printers. See the Simplify User Assigned Printers Tool Quick Reference Guide for assistance.



After you import printer drivers, create Printer objects, and assign the printers to the correct owners, you can define driver installation behavior and a printer naming scheme on a per owner basis. See the Simplify Driver Management section in the Simplify Suite Administrator Guide.