tricerat®

Simplify Suite

Administrator Guide

Version 6.7

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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.

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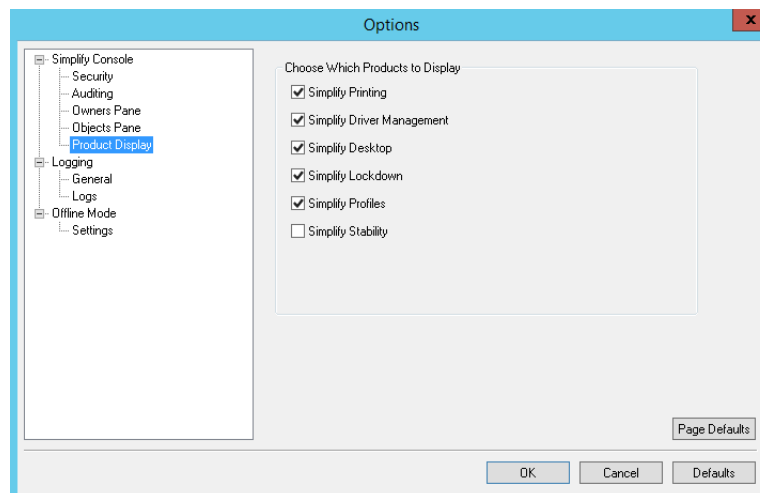
You can always change the products that are or are not displayed in the Simplify Console. See "Specifying Simplify Suite Options" on page 30. Simplify Stability is a legacy product. For assistance with this product, contact Tricerat.

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
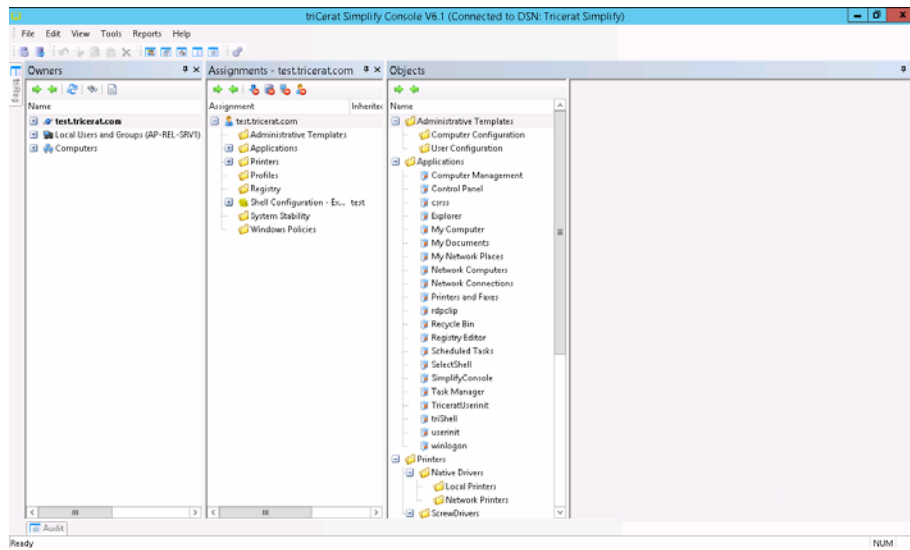
The Simplify Console Layout

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.

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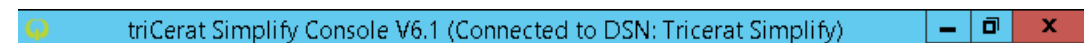
To see the version number for each component that has been installed for Simplify Suite, on the main menu, click Help > About Simplify Console.

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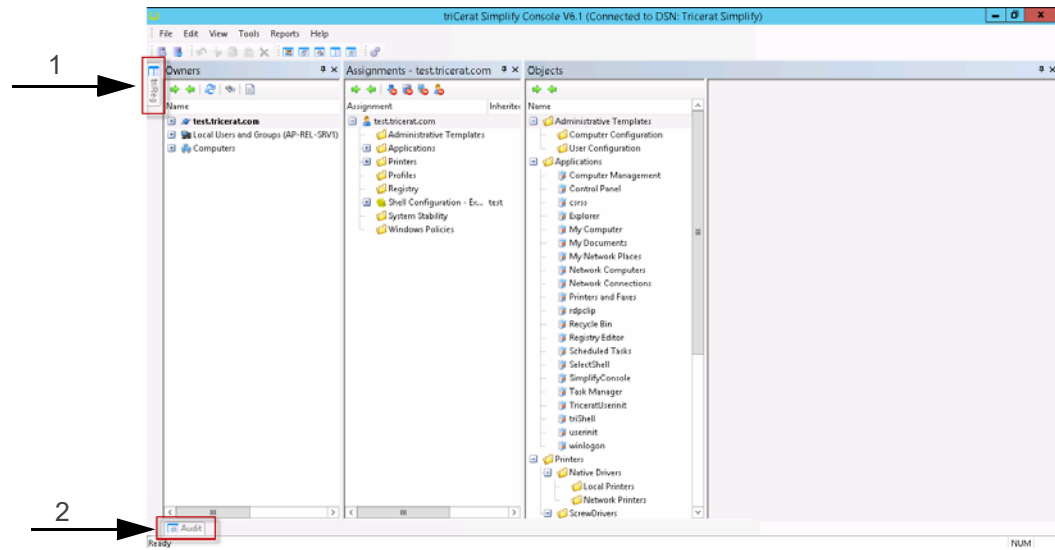
Item	Description
1	Hidden triReg tool.
2	Hidden Audit tool.

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
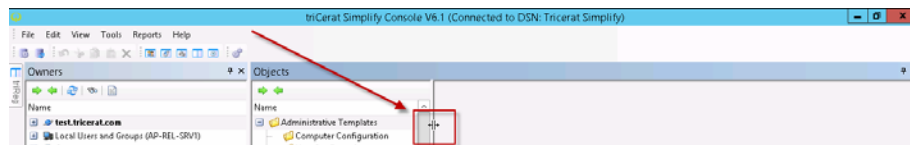
To dock a pane

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
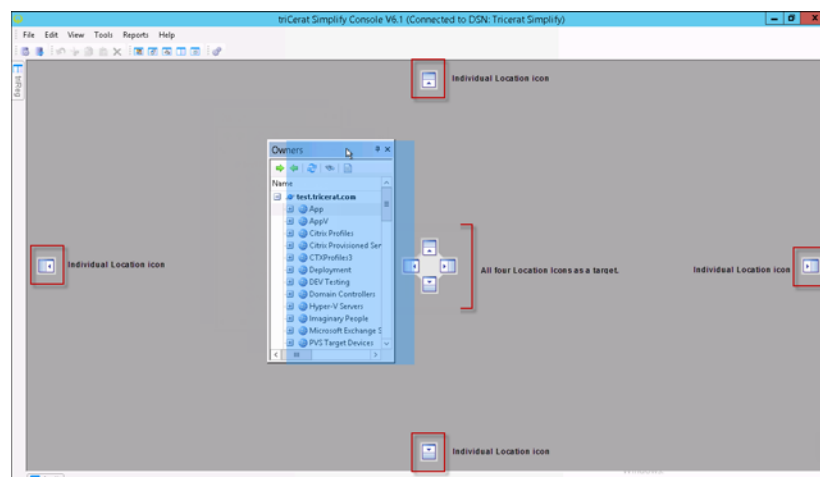
2. Drop the pane onto the appropriate location icon.

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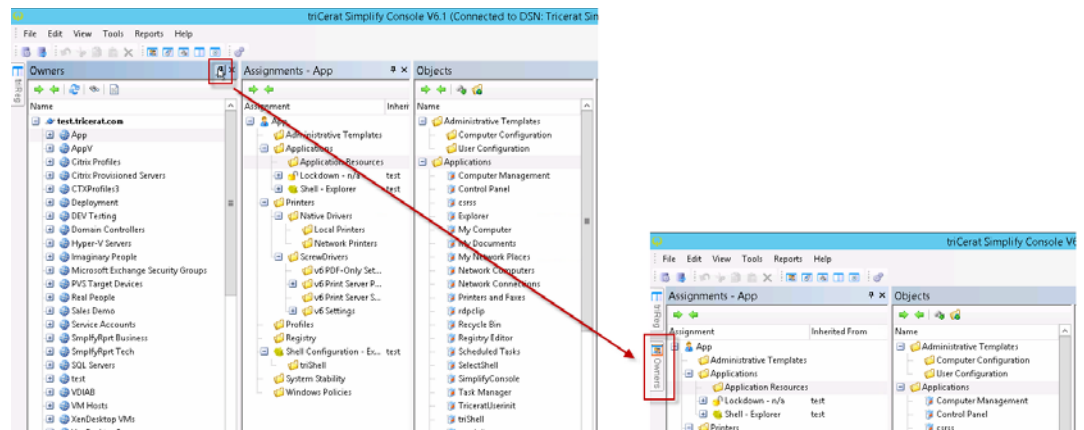
Figure 1-11: Auto hiding a pane with any layout other than the default layout
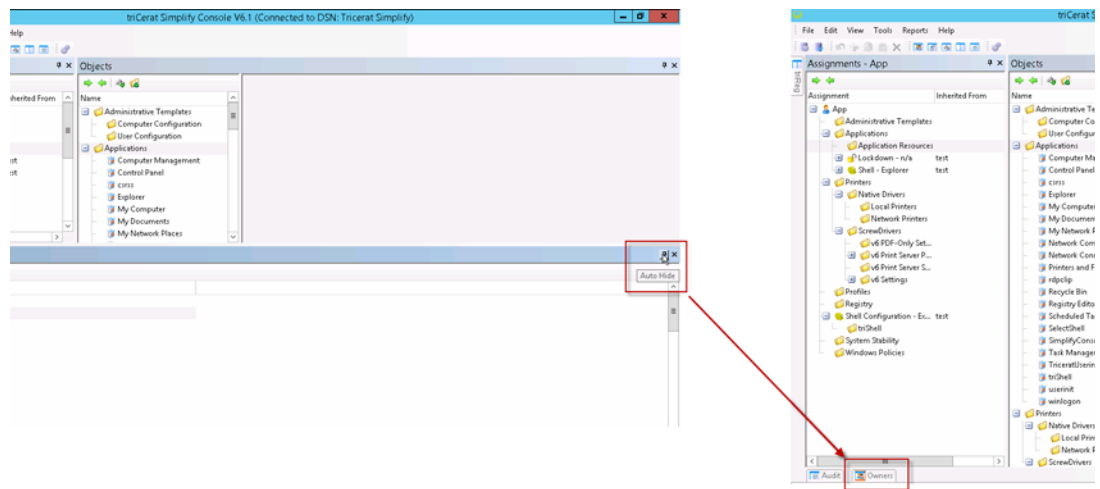
To show an Auto Hidden pane

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
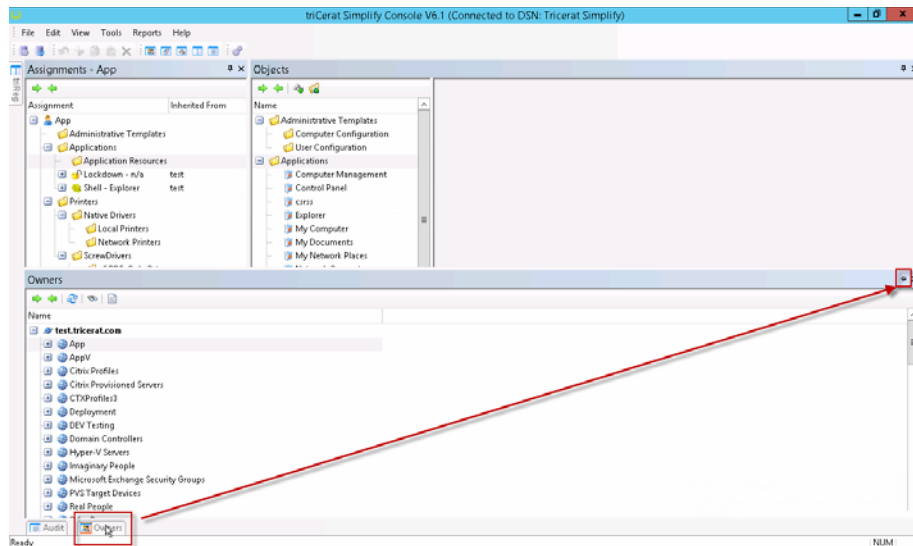
To float a docked pane

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
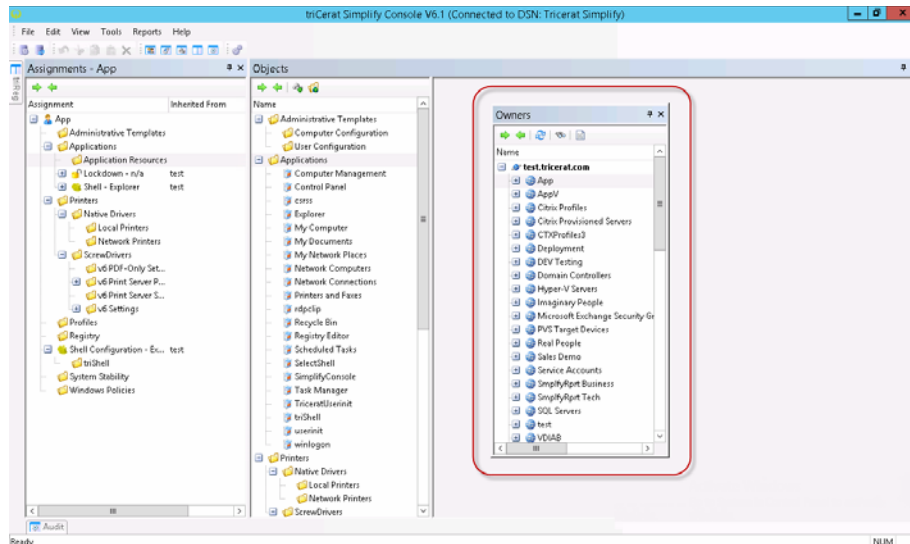
To create a pane group

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
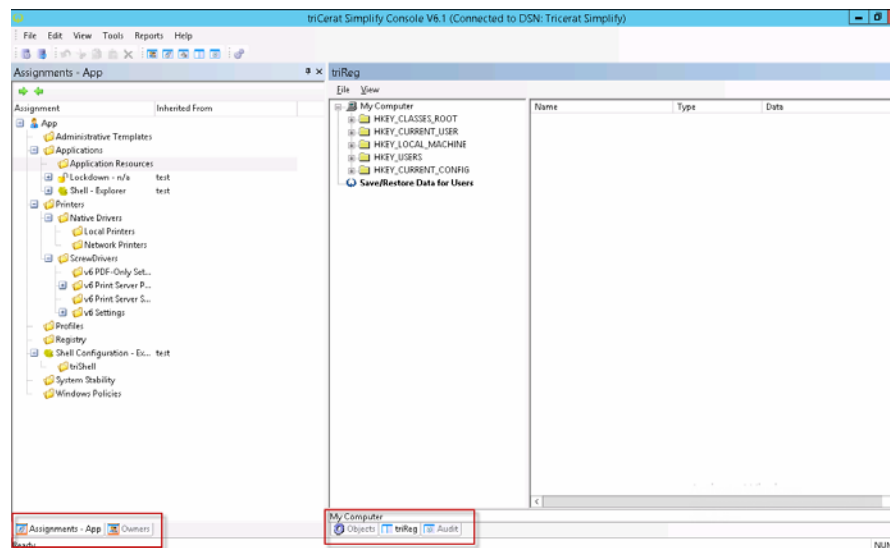
To reset the Simplify Console to its default layout

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 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
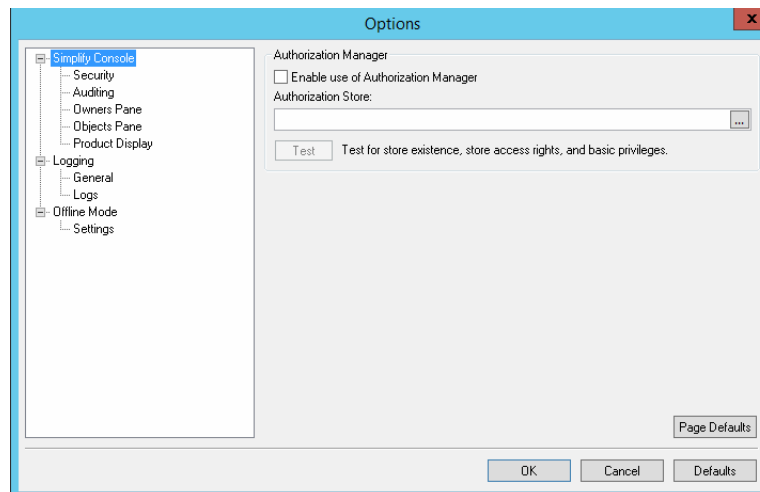
2. Modify any of the default settings as needed.

    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	• 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. **Note:** For detailed information about auditing the Simplify database, see "Auditing the Simplify Database" on page 66.
Owners Pane	• 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	• 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	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. • Simplify Printing • Simplify Desktop • Simplify Lockdown • Simplify Profiles • Simplify Driver Management **Note:** Simplify Stability is a legacy product. For assistance with this product, contact Tricerat.
Logging	
General	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. **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.
Logs	Logs – You use these logs strictly for debugging purposes, and you should enable them only under the direction of Tricerat support.
Offline Mode	
Settings	• 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 *Simplify Desktop User Guide*.

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

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
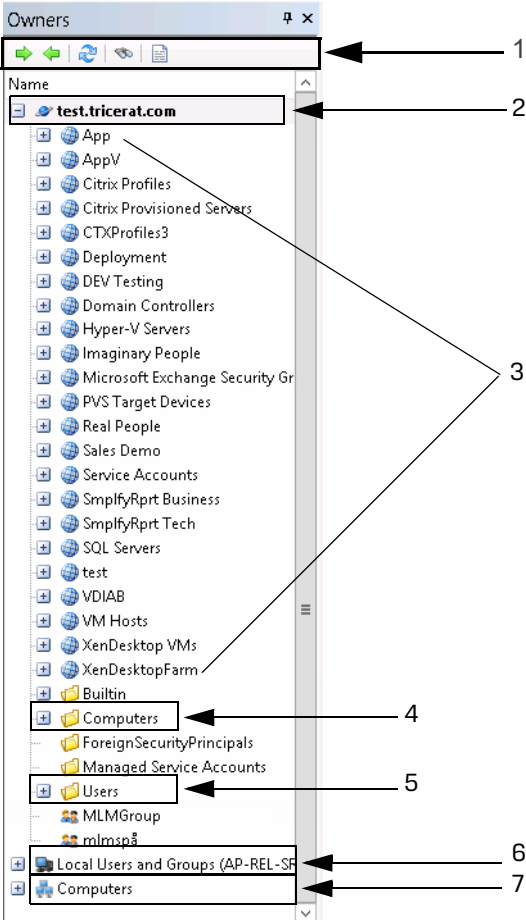
Table 2-1: Owners pane items

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

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*For a definition of a direct assignment, see *

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
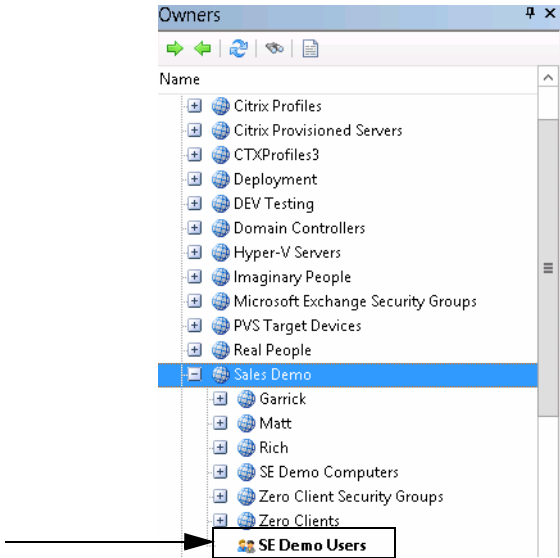
The hierarchical structure of the Owners pane is not simply an organizational tool. It also serves a practical purpose for inheritance of objects by owners. See "Owner Inheritance" on page 44.

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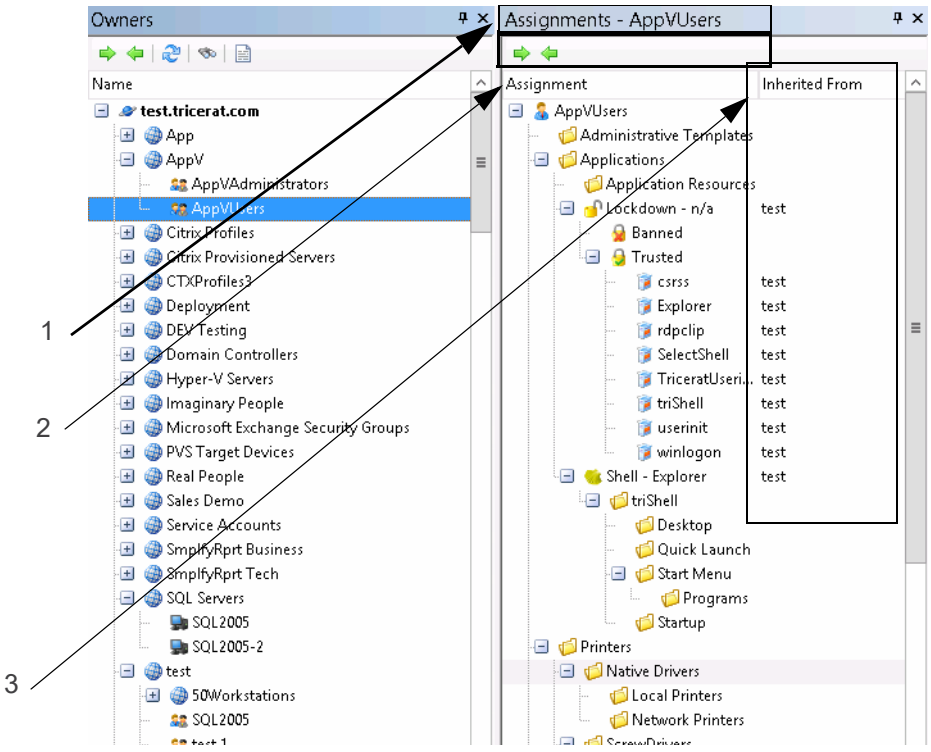
Item	Description
1	AppVUsers owner selected in the Owners pane and displayed in the title bar of Assignments pane.
2	Assignments pane toolbar.
3	Inheritance information.

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	
	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.
	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.
	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.
	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.
Other icons	
	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
	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.
	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.
	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.

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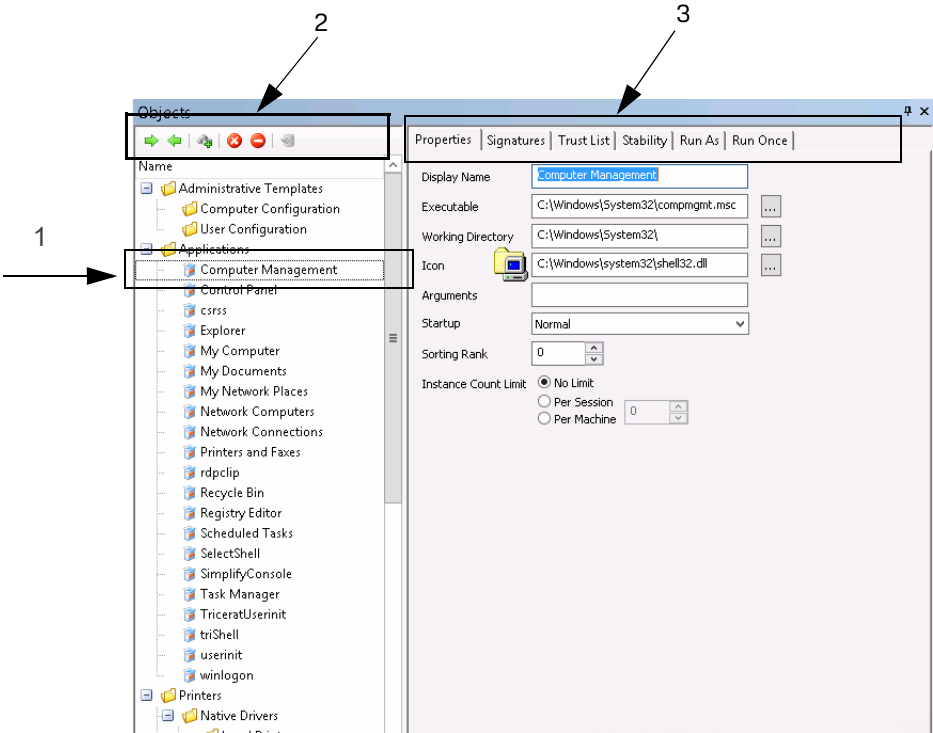
Item	Description
1	Selected object.
2	Objects toolbar. Displayed in left sub-pane.
3	Tabbed object form displayed in right sub-pane for selected object.

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.
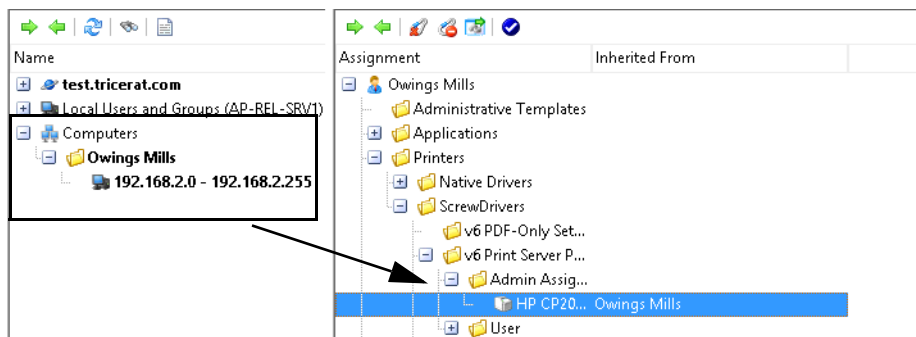
Figure 3-2:   Printer assignment denied - The HP printer is now denied assignment for the IP
address range.
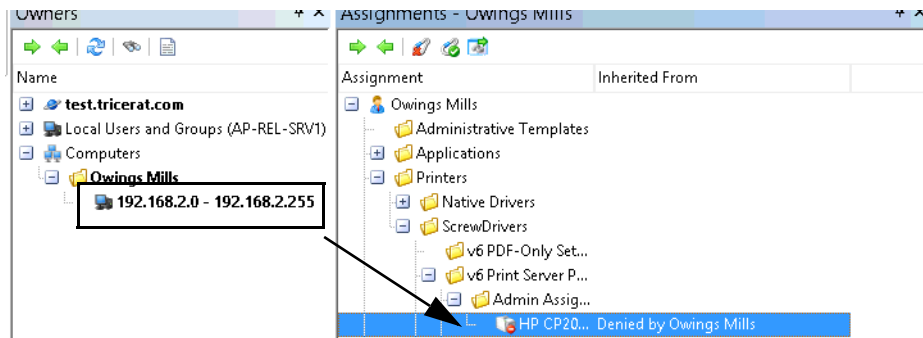
Figure 3-3:   Assignment to SD Users group - Any user, however, who is a member of the SD
Users group has been assigned this printer.

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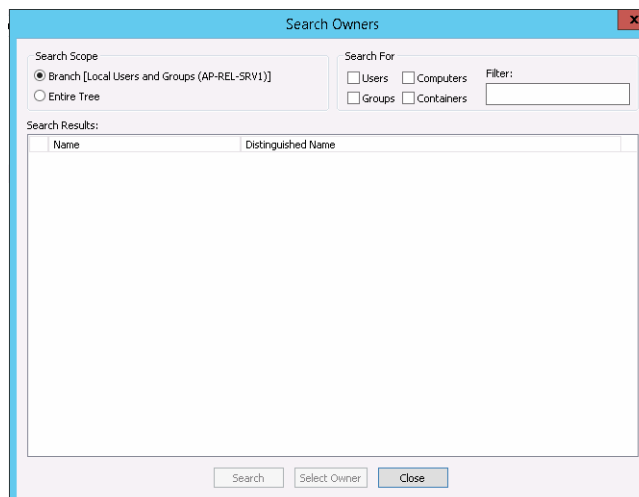
2. Select the types of owners for which to search – Users, Computers, Groups, and/or Containers.

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: **MONITOR**IT, Performance **Monitor** Users, and Simplify **Monitor**ing.*

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	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. 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). **Note:** Groups can be nested.

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
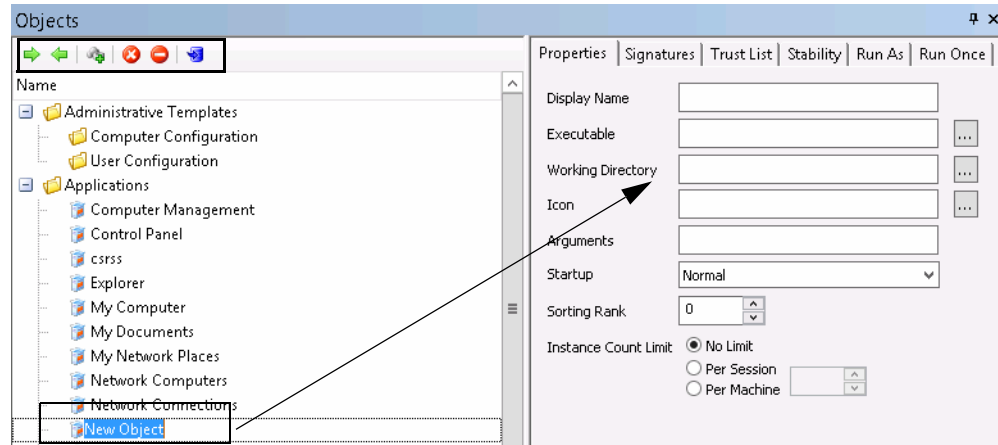
2.   Enter the name for the new object.

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
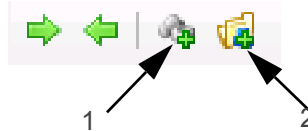
1. Click the folder in the Objects tree to which the new object group is to be added, and then do one of the following:

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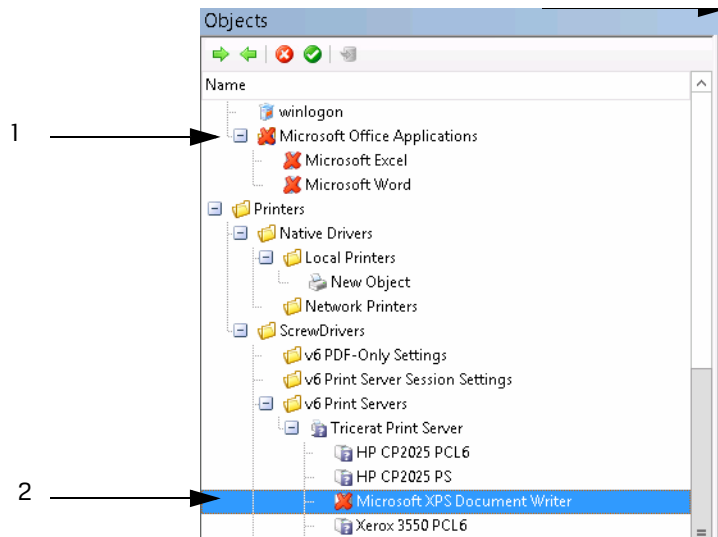
Item	Description
1	All objects in the object group disabled at the group level.
2	Object individually disabled.

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
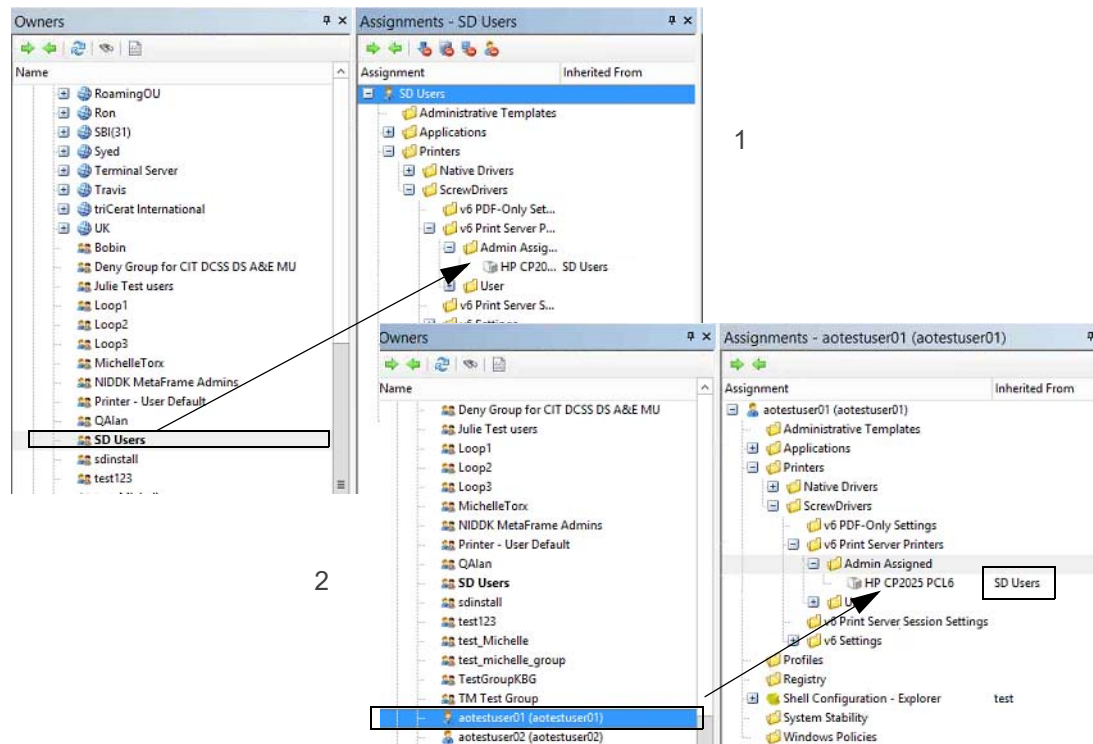
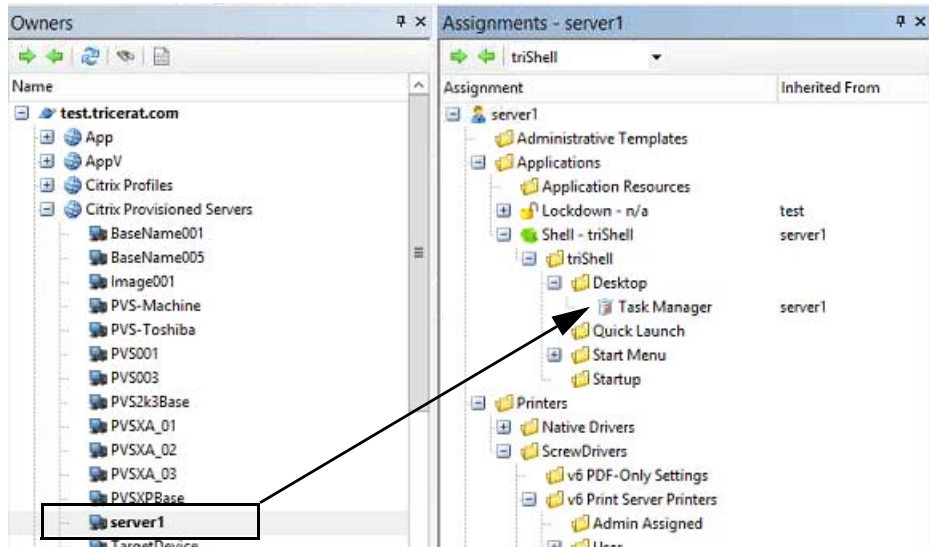- The server assignments – Any object that is assigned directly to the server (Terminal Server or Virtual Desktop) or any Group/OU/IP range of which the server is a member. For example, in Figure 3-10 below, the Task Manager application is assigned to the server at the Desktop level. This application 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
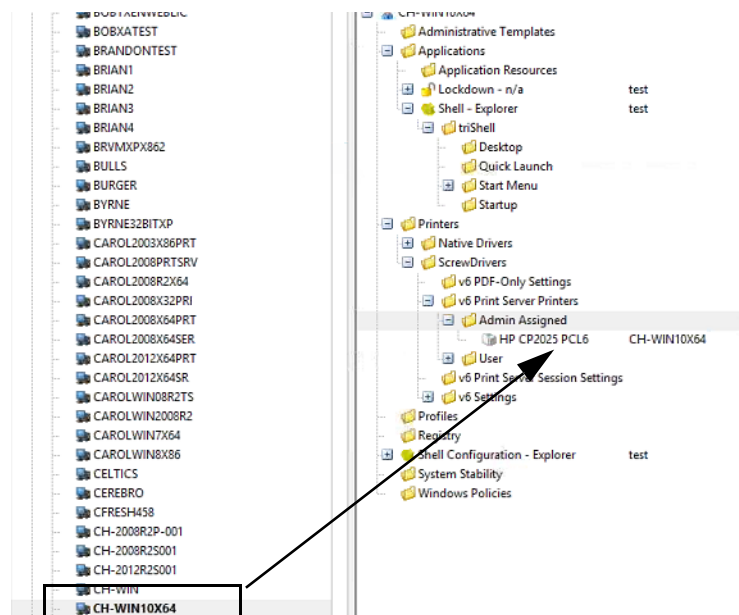
As the Simplify Console administrator, in addition to making direct assignments, your duties for managing assignments include deleting direct assignments, denying or permitting assignments, and blocking owners from receiving one or more assignment types.

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 the 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 the 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 the 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

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
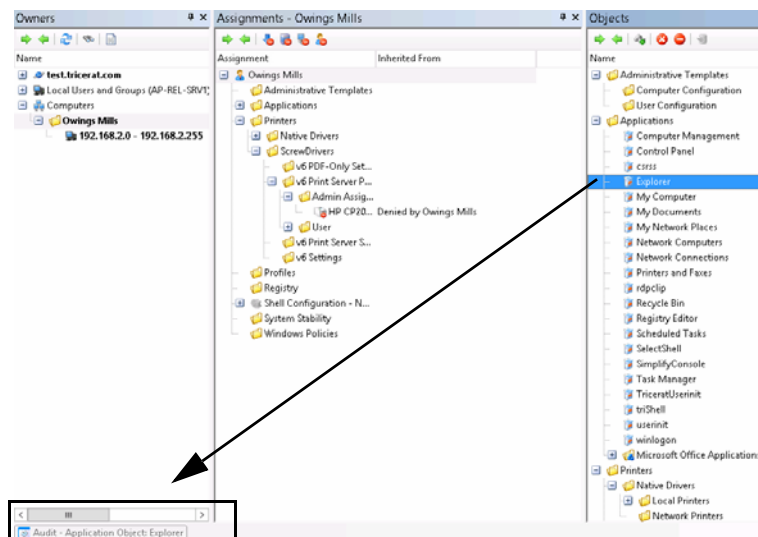
2. Click the Audit tab to open the Audit pane and review the data for the selected object or owner. See "Audit pane" on page 67.

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
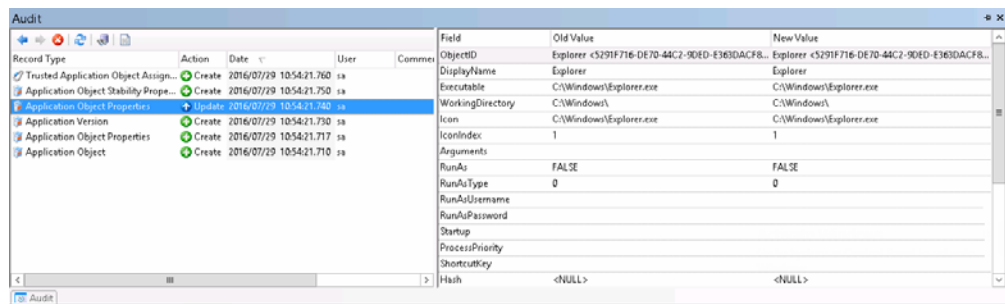
Audit pane toolbar

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
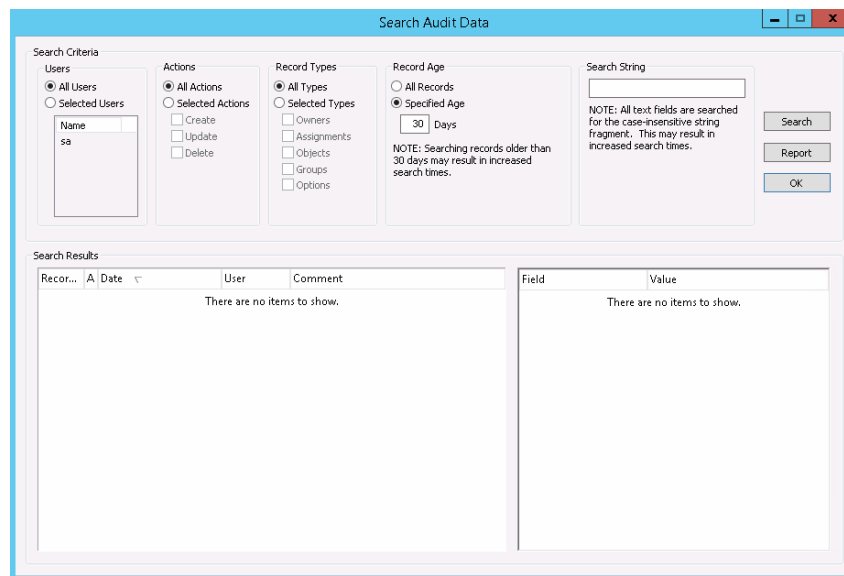
3. Specify your search criteria.

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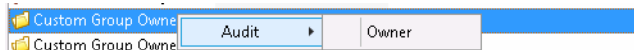
A closed Audit tab is docked at the bottom of the Simplify Console window.

    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 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.
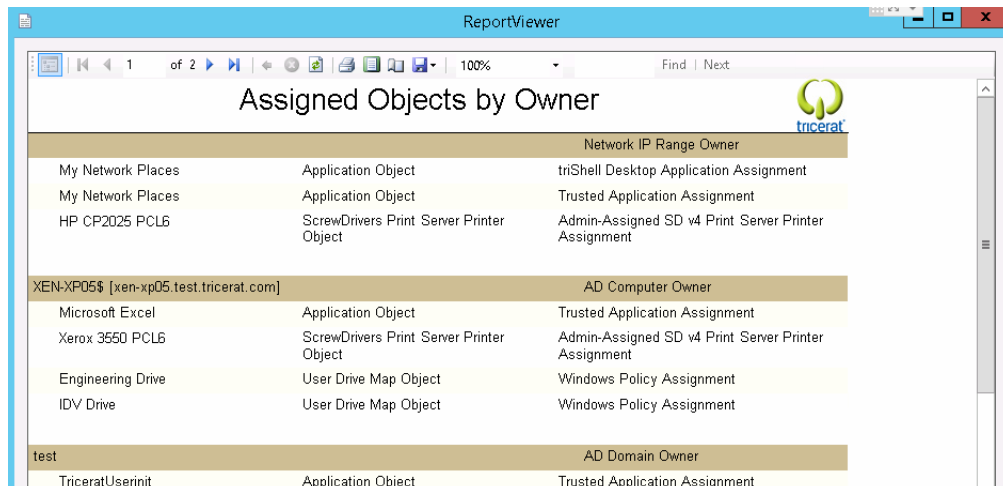
Figure 4-6: Assigned Objects by Owners report

Figure 4-7:   Assigned Owners by Object report

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.

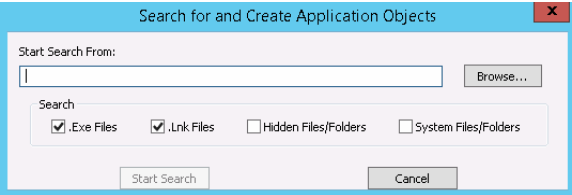This chapter covers the following topics:

- "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	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: • "The RegDiff Tool" on page 189. • "Simplify Migration Utility" on page 197. **Note:** For assistance in using any of these external tools, contact support@tricerat.com.
Note: The following six options are used in Simplify Lockdown. For detailed information about Simplify Lockdown, see the *Simplify Lockdown User Guide.*	
Configure Simplify Lockdown	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.
Customize Lockdown Messages	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.
Services	Provides options for stopping, starting, or restarting the Simplify Printing service. **Note:** The Simplify Stability option is a legacy option and is no longer applicable for Simplify Suite.
Import Learn Mode Apps	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.
Show Users in Learn Mode	Opens a list of users for whom Learn Mode has been turned on.
Show Denied Apps	Opens a list of objects that have been added to the banned list.

Option	Description
Find Apps to Import	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. *Figure 5-1: Search For and Create Application Objects dialog box*
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
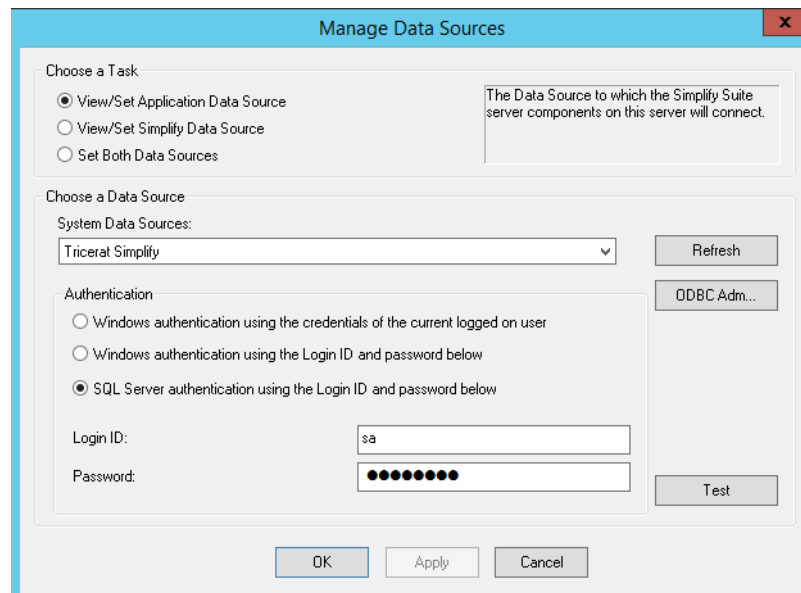
> *Generally, after the initial installation of the Simplify Suite and under normal operating conditions, you do not have to modify the data source values or administer the ODBC data source for Simplify Suite. For additional information about installing and configuring the Simplify Suite, see the Simplify Suite Installation Guide.*