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Simplify Suite  
Administrator Guide  
Version 6.7

Release Info	This version of the <i>Simplify Suite Administrator Guide</i> is applicable for all software versions of Simplify Suite 6.7 and greater, and all software versions of ScrewDrivers 6.7 and greater, and is current until replaced.
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# Preface

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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 11](#) 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 12](#) 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 27](#) 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 38](#) 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 60](#) 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 68](#) details the tools that available through Simplify Console for retrieving and manipulating the data that is relevant to the operation of Simplify Suite, and for configuring the console and/or Simplify Suite.
- [Section 2, “Simplify Printing,” on page 72](#) provides detailed instructions for administering and managing Simplify Printing. This section contains the following chapters and appendices:
  - [Chapter 1, “Getting Started with Simplify Printing,” on page 73](#) provides information about logging in to Simplify Console for managing your Simplify Printing instance. It also provides a high-level overview of the ways that different clients can interact with Simplify Printing.
  - [Chapter 2, “Managing Printer Objects in Simplify Printing,” on page 78](#) details how to

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

- [Chapter 3, “Managing ScrewDrivers Objects and Settings,” on page 100](#) details the ScrewDrivers configuration settings that are available for assignment in the Simplify Console.
- [Appendix A, “ScrewDrivers Troubleshooting,” on page 110](#) provides some general considerations when troubleshooting the ScrewDrivers components of Simplify Printing. It also provides information about solving some of the most common problems you might encounter when using ScrewDrivers.

# Section 1

# Simplify Console

## Section Contents

- [Getting Started with Simplify Console on page 12](#)
- [The Simplify Console Panes on page 27](#)
- [Managing the Simplify Suite with Simplify Console on page 38](#)
- [Data Review in the Simplify Console on page 60](#)
- [Simplify Console Tools on page 68](#)

# Chapter 1

## Getting Started with Simplify Console

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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 13.](#)
- [“The Simplify Console Layout” on page 15.](#)
- [“Customizing the Simplify Console Layout” on page 19.](#)
- [“Specifying Simplify Suite Options” on page 25.](#)

# 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*.

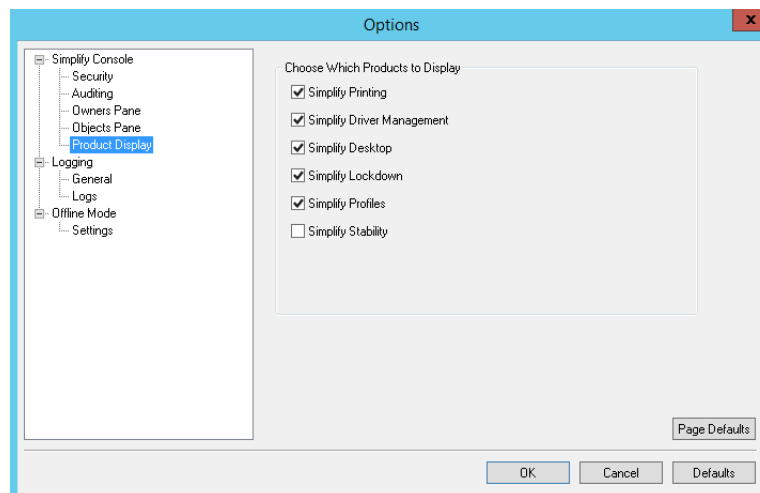
After Simplify Console has been installed, a shortcut icon for the application is placed on your desktop. An option for Simplify Console is also available from your Start menu. You can double-click the desktop icon to launch Simplify Console, or you can select the option from your Start menu (Start >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

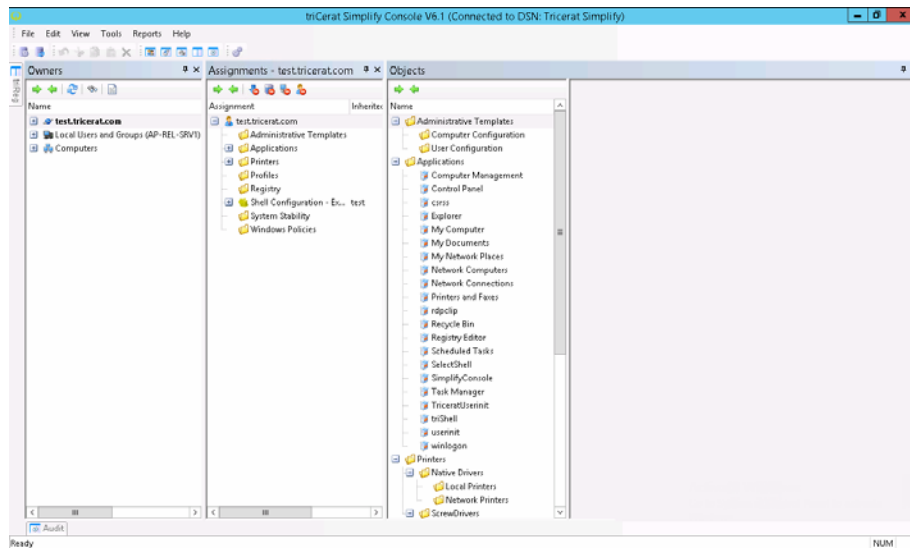




You can always change the products that are or are not displayed in the Simplify Console. See [“Specifying Simplify Suite Options” on page 25](#). Simplify Stability is a legacy product. For assistance with this product, contact Tricerat.

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

Figure 1-3: Simplify Console window



# The Simplify Console Layout

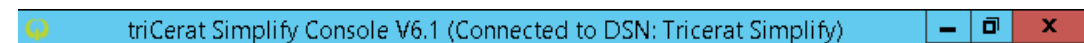
The Simplify Console user interface consists of a single window that has four major components – the title bar, the main menu, the toolbar, and the panes. See:

- “Title bar” below.
- “Main menu” below.
- “Toolbar” below.
- “Panels” on page 17.

## 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

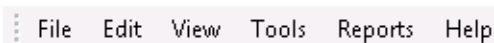


To see the version number for each component that has been installed for Simplify Suite, on the main menu, click Help > About Simplify Console.

## 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 19.

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 19.) 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

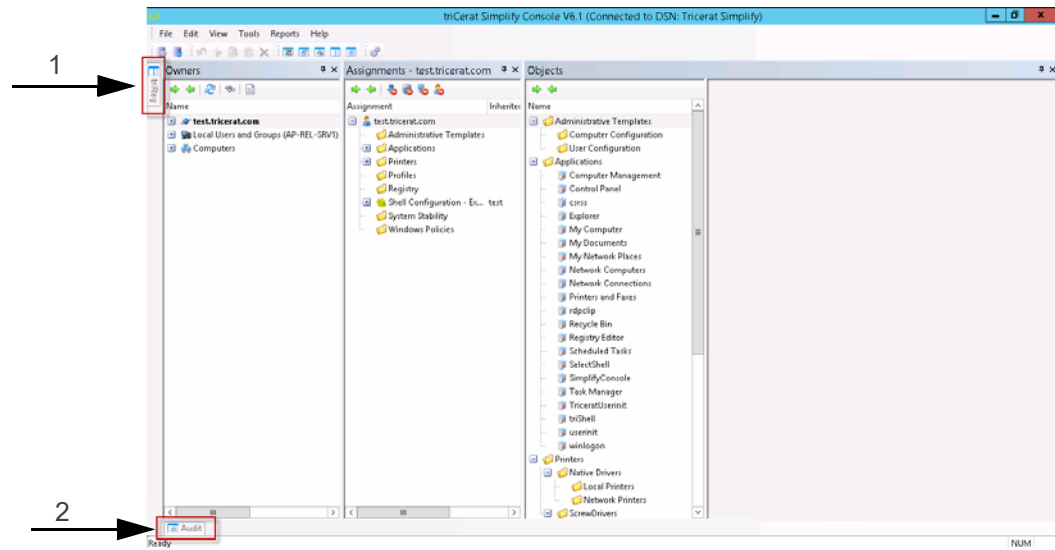
Icon	Description
	Manage Database icon – Opens the Manage Data Sources dialog box, which contains all the functions and options for managing the data sources to which the Simplify Suite connects. See <a href="#">“The Manage Data Sources Tool” on page 71</a> .
	Refresh Database icon – Refreshes the Simplify database. <b>Note:</b> 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. <b>Note:</b> 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. <b>Note:</b> 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 <a href="#">“The Owners Pane” on page 28</a> . <b>Note:</b> This option is also available on the View menu (View > Owners).
	Show Assignments icon – If not already opened, then opens the Assignments pane. See <a href="#">“The Assignments Pane” on page 32</a> . <b>Note:</b> This option is also available on the View menu (View > Assignments).
	Show Objects icon – If not already opened, then opens the Objects pane. See <a href="#">“The Objects Pane” on page 35</a> . <b>Note:</b> 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 <a href="#">“The triReg Tool” on page 193</a> . <b>Note:</b> This option is also available on the View menu (View > triReg).
	Show Audit icon – If not already opened, then opens the Audit pane. See <a href="#">“Auditing the Simplify Database” on page 61</a> . <b>Note:</b> This option is also available on the View menu (View > Audit).
	Options icon – Opens the Options dialog box. See <a href="#">“Specifying Simplify Suite Options” on page 25</a> . <b>Note:</b> 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 19.

# 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 20.
- Auto hide a pane. See [“To auto hide a pane”](#) on page 21.
- Show an auto-hidden pane. See [“To show an Auto Hidden pane”](#) on page 22.
- Float a docked pane. See [“To float a docked pane”](#) on page 22.
- Create a pane group. See [“To create a pane group”](#) on page 23.
- Reset the Simplify Console to its default layout. See [“To reset the Simplify Console to its default layout”](#) on page 24.

## 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.

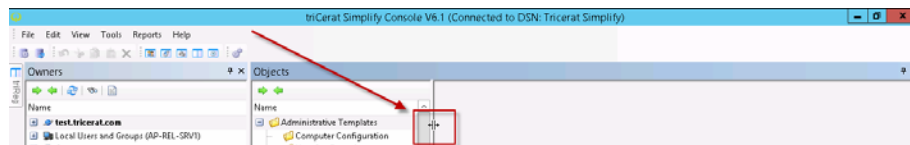
- On the Simplify Console toolbar, click the appropriate icon. See [“Toolbar” on page 15](#).
- To close a pane at any time, in the upper right corner of the pane, click the Close (x) icon.

## 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

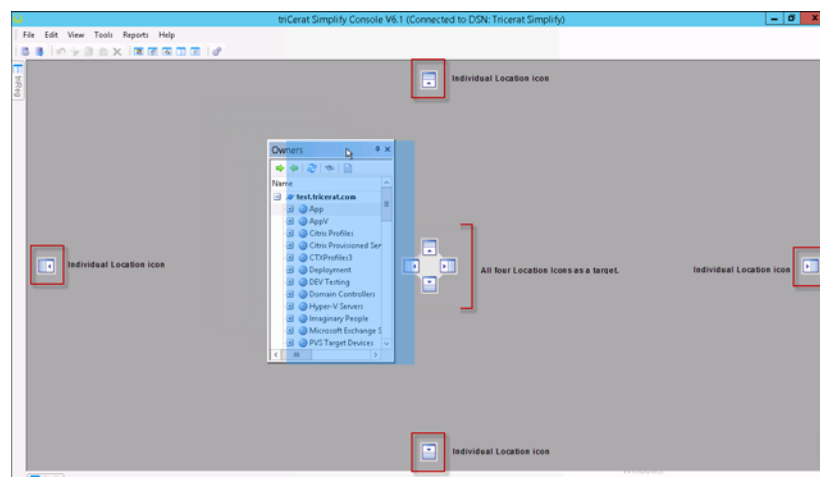


## To dock a pane

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

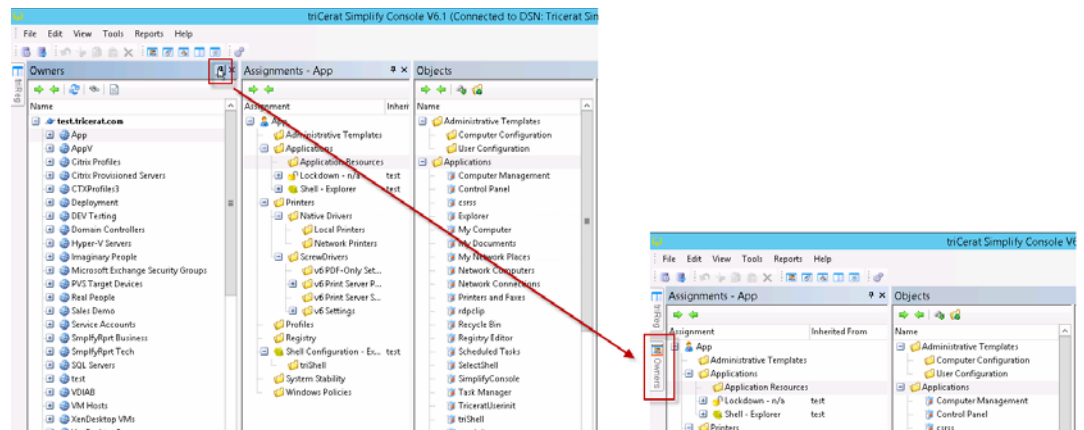
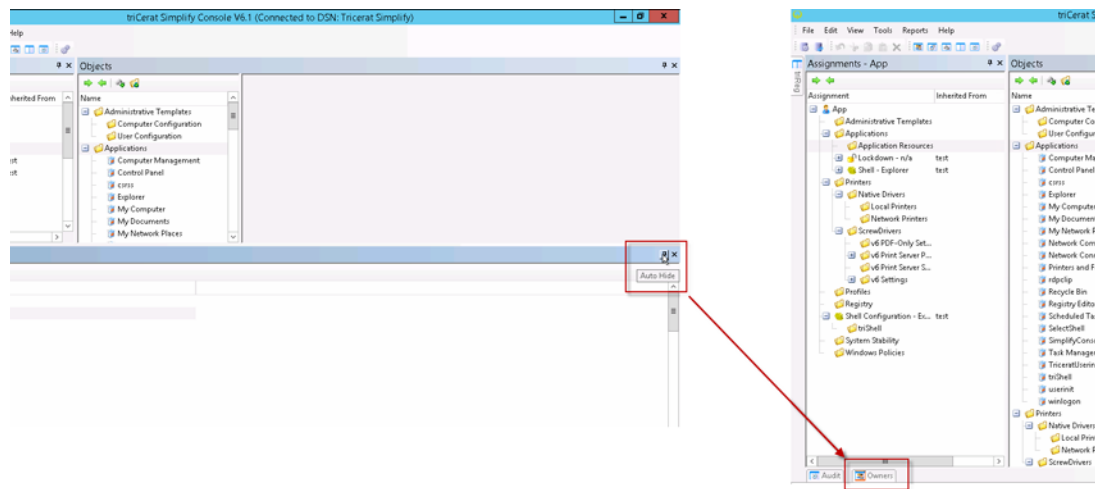


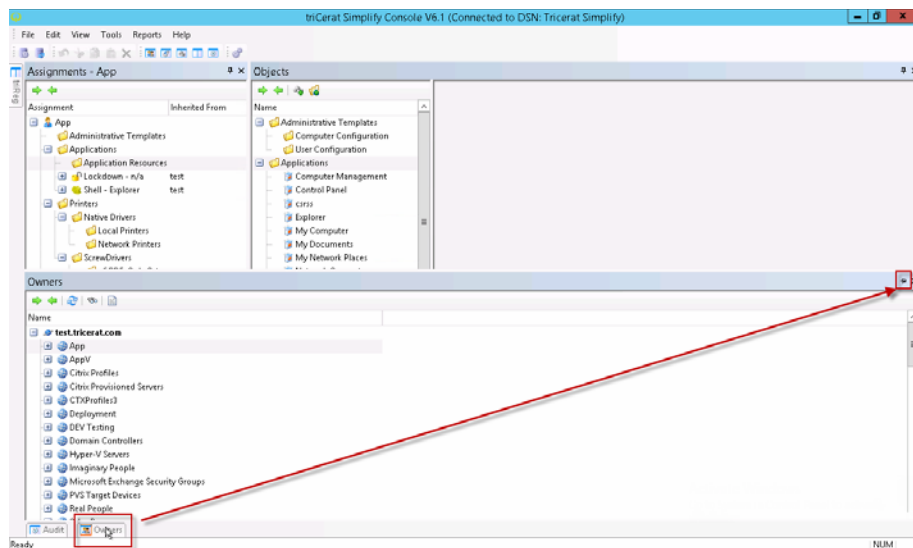
Figure 1-11: Auto hiding a pane with any layout other than the default layout



## 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.

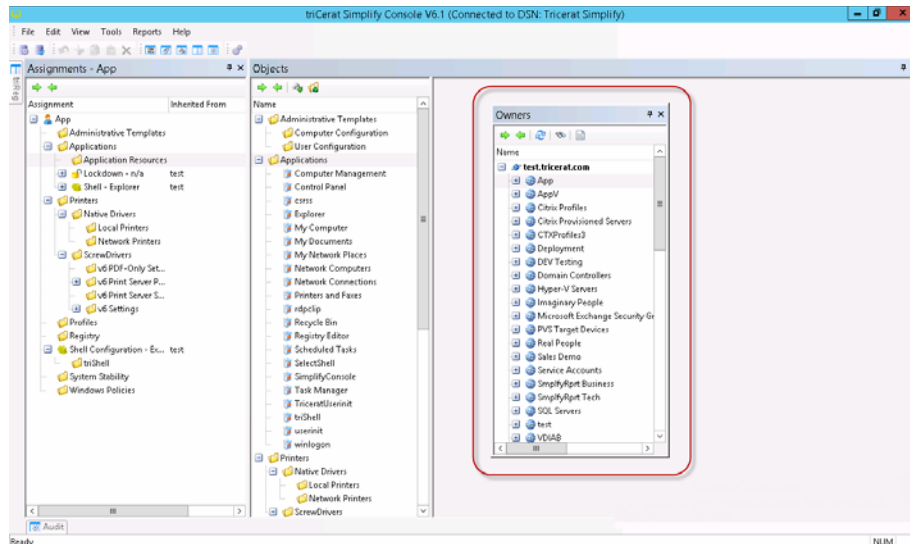
Figure 1-12: Showing an auto-hidden pane



## 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 20.](#)) 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 23.](#)

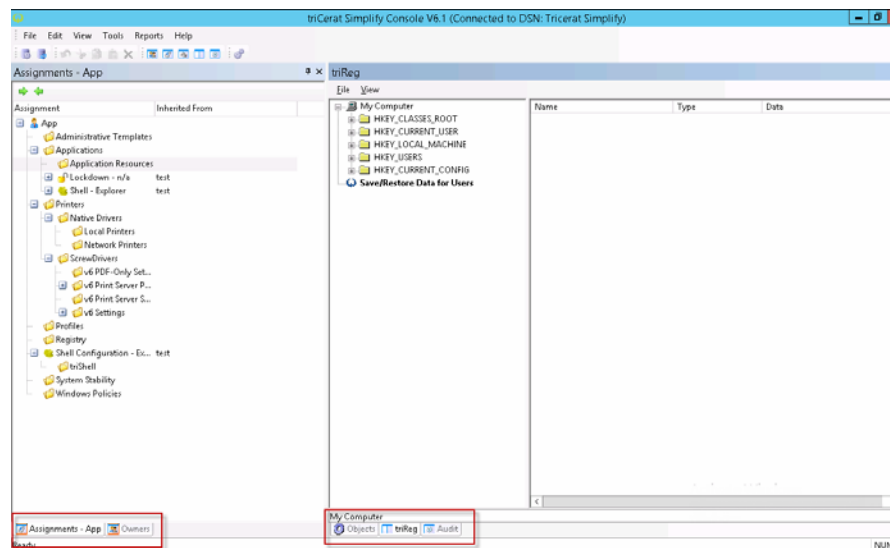
Figure 1-13: Floating a docked pane



## To create a pane group

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

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



## To reset the Simplify Console to its default layout

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




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



# Specifying Simplify Suite Options

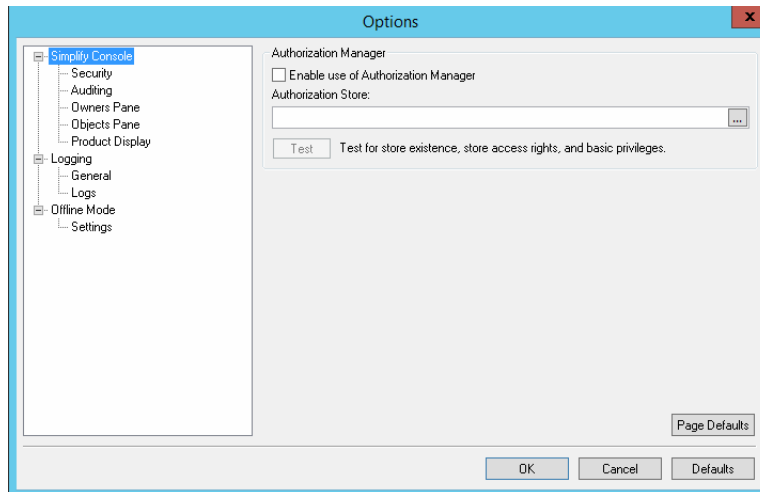
Typically, after installation, the default values that are specified for Simplify Suite, including the Simplify Console, are satisfactory for most organizations and do not require modification; however, you always have the option of **modifying** any or all the default values to better suit your working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

## To specify Simplify Suite options

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

The Options dialog box opens.

Figure 1-15: Options dialog box



2. Modify any of the default settings as needed.



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

Option	Description
<b>Simplify Console</b>	
Security	Authorization Manager

Option	Description
Auditing	<ul style="list-style-type: none"> <li>Audit Control – By default, auditing is enabled. To disable auditing, clear Enable Auditing.</li> <li>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.</li> </ul> <p><b>Note:</b> For detailed information about auditing the Simplify database, see <a href="#">“Auditing the Simplify Database” on page 61</a>.</p>
Owners Pane	<ul style="list-style-type: none"> <li>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.</li> <li>Search – By default, the maximum number of owners that can be returned by a Search is 50. Modify this value as needed.</li> </ul>
Objects Pane	<ul style="list-style-type: none"> <li>Auto-Query Printers on Save – Enabled by default. To disable this option, clear it.</li> <li>Perform Query Printers as a Background Test – Disabled by default. To enable the option, select it.</li> </ul>
Product Display	<p>Choose which products are to be displayed in the Simplify Console. All products are selected by default. To remove a product from the display, clear its selection.</p> <ul style="list-style-type: none"> <li>Simplify Printing</li> <li>Simplify Desktop</li> <li>Simplify Lockdown</li> <li>Simplify Profiles</li> <li>Simplify Driver Management</li> </ul> <p><b>Note:</b> Simplify Stability is a legacy product. For assistance with this product, contact Tricerat.</p>
<b>Logging</b>	
General	<p>Suite Status Log – Click Generate to generate the Suite Status log, which details general information about your Simplify Suite installation, including the OS version, the Suite and file version, and the relevant ODBC data sources.</p> <p><b>Note:</b> After you click Generate, the Save As dialog box opens, in which you can leave the default values for the storage directory and file name for the Suite Status log (C:\Program Files\Tricerat\Simplify Suite\Simplify Console and SuiteStatus.log) as-is, or you can modify one or both values as needed.</p>
Logs	<p>Logs – You use these logs strictly for debugging purposes, and you should enable them only under the direction of Tricerat support.</p>
<b>Offline Mode</b>	
Settings	<ul style="list-style-type: none"> <li>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 <a href="#">“Simplify Profiles” on page 118</a>.</li> <li>Enable Offline Mode for Simplify Desktop – By default, disabled. Select Enable Offline Mode for Simplify Desktop to enable it. For detailed information about Simplify Desktop, see the <i>Simplify Desktop User Guide</i>.</li> </ul>

3. Click OK.

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

# Chapter 2

## The Simplify Console Panes

---

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

This chapter covers the following topics:

- [“The Owners Pane” on page 28.](#)
- [“The Assignments Pane” on page 32.](#)
- [“The Objects Pane” on page 35.](#)

# 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 2-2 on page 29](#) for a description of the items in the Owners pane.

Figure 2-16: Owners pane

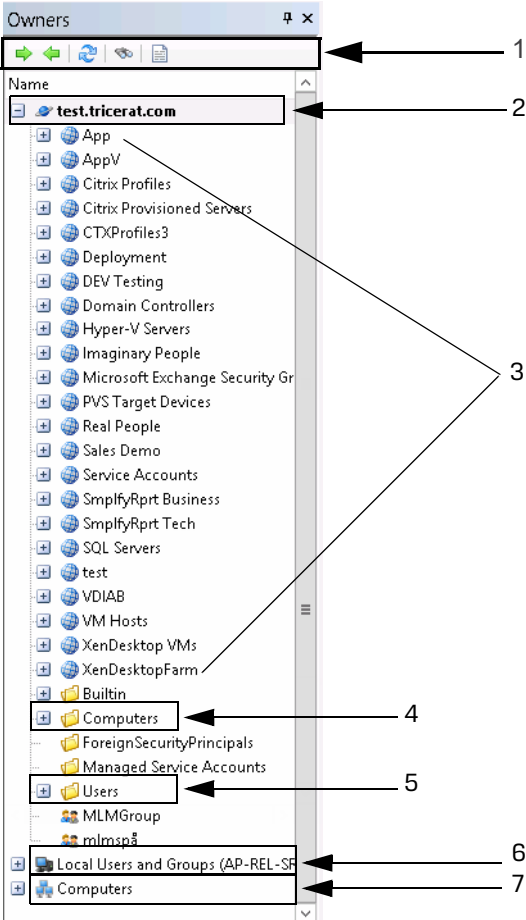


Table 2-2: Owners pane items

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

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

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

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

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

Unique icons are used to identify the different owner types. An owner's name is displayed in bold in the Owners pane if one or more direct assignments have been made to the owner. See [Table 2-3](#) and [Figure 2-17 on page 30](#).



For a definition of a direct assignment, see [“The Assignments Pane” on page 32](#).

**Table 2-3: Owners pane icons**







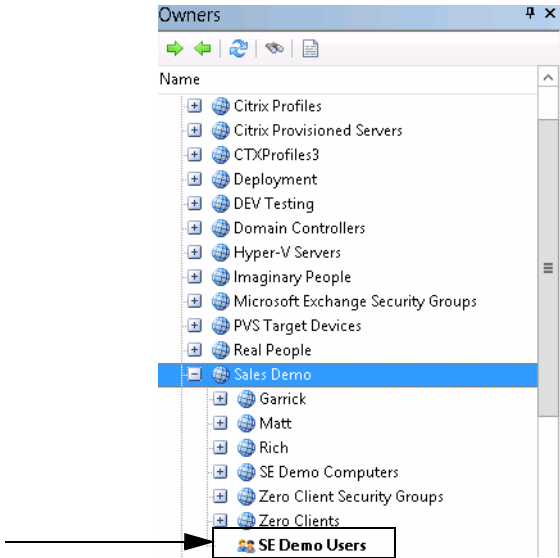
Icon	Owner Type
	Primary domain or Trusted Domain
	Container under a domain or a group under a Customer Owner
	Organizational Unit for a domain
	Group
	User
	Custom Owner (Client computer specified by Name, IP Address, or IP Address Range. Groups of custom owners are also allowed.)

Figure 2-17: 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 39](#).

## 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 2-18: Owners pane toolbar

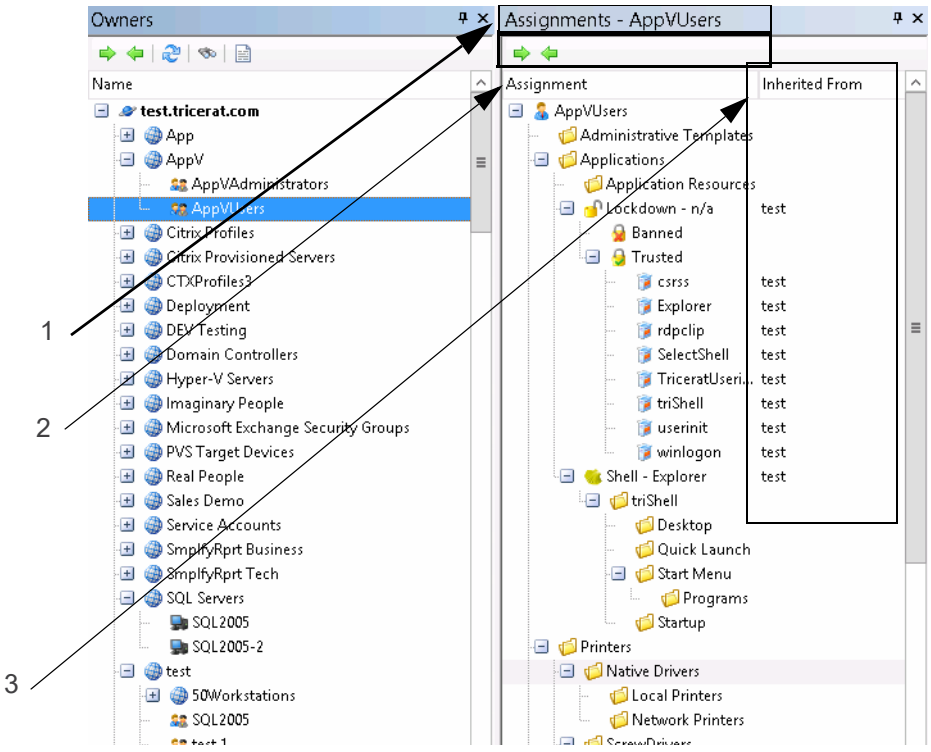


Icon	Description
	Expand icon – Expands the Owners tree structure.
	Collapse icon – Collapses the Owners tree structure.
	Refresh icon – Refreshes the Active Directory.
	Search Owners icon – Opens the Search Owners dialog box, which provides options for searching owners in the Owners pane. See <a href="#">“To search for owners in the Owners pane” on page 44.</a>
	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 2-19: 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 53](#).

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 35](#).

## 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
<b>Icons that are always displayed</b>	
	Expand icon – Expands the Assignments tree structure.
	Collapse icon – Collapses the Assignments tree structure.

Icon	Description
<b>Icons that are displayed when the owner (top-level) is selected in the Assignments tree</b>	
	<p>Block Inherited Assignments icon – A toggle for blocking inherited assignments for a selected owner and all the owner’s children. Click once to enable blocking. The toggle is highlighted with a blue square. Click again to disable blocking. The highlighting blue square is removed. See <a href="#">“To block an owner from receiving an assignment” on page 58.</a></p>
	<p>Block Server Assignments icon – A toggle for blocking all server assignments for a selected owner and the owner’s children. Click once to enable blocking. The toggle is highlighted with a blue square. Click again to disable blocking. The highlighting blue square is removed. See <a href="#">“To block an owner from receiving an assignment” on page 58.</a></p>
	<p>Block Client Assignments icon - A toggle for blocking all client assignments for a selected owner and the owner’s children. Click once to enable blocking. The toggle is highlighted with a blue square. Click again to disable blocking. The highlighting blue square is removed. See <a href="#">“To block an owner from receiving an assignment” on page 58.</a></p>
	<p>Block Owner Assignments - A toggle for blocking all of the owner’s (user’s) direct assignments as well as all the owner’s inherited assignments. Click once to enable blocking. The toggle is highlighted with a blue square. Click again to disable blocking. The highlighting blue square is removed. See <a href="#">“To block an owner from receiving an assignment” on page 58.</a></p>
<b>Other icons</b>	
	<p>Delete Assignment icon – Displayed when a direct assignment is selected in the Assignments tree. Click this icon to delete the direct assignment for an owner. See <a href="#">“To delete a direct assignment of an object for an owner” on page 56</a></p>
	<p>Deny Assignment icon – Displayed when a either a direct assignment or an inherited assignment is selected in the Assignments tree. Click this icon to deny the inherited assignment for the parent owner as well as all its children. See <a href="#">“To deny an assignment of an object” on page 57.</a></p>
	<p>Permit Assignment icon – Displayed when a denied assignment is selected in the Assignments tree. Click this icon to permit the assignment for the parent owner and all its children, or just the selected child owner. See <a href="#">“To permit an assignment of an object” on page 58.</a></p>
	<p>Select Item in Objects Tree icon – Always displayed when any object (a direct assignment, or permitted or denied) is selected in the Assignments tree. Click this icon to highlight the object in the Objects Tree and update the object form display with the configuration settings for the selected object.</p>

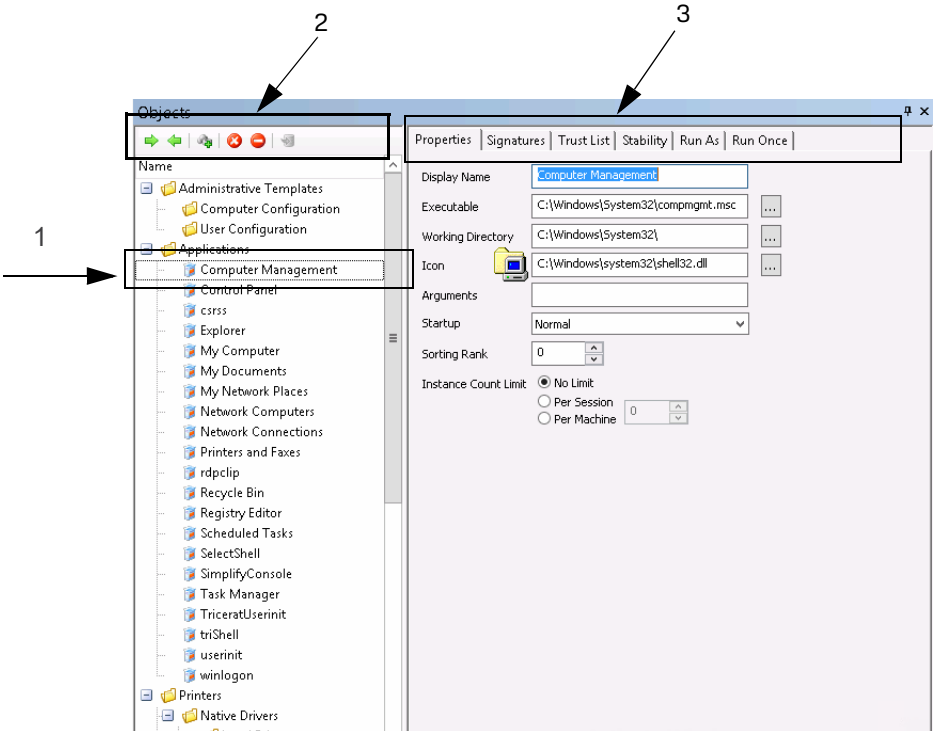
# The Objects Pane

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



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

Figure 2-20: 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
<b>Icons that are always displayed</b>	
	Expand icon – Expands the Objects tree structure.
	Collapse icon – Collapses the Objects tree structure.
<b>Other icons</b>	
	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 <a href="#">“To add a new object” on page 47.</a>
	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 <a href="#">“To add a new object group” on page 49.</a>
	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 <a href="#">“To delete an object or object group” on page 49.</a> <b>Note:</b> 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 <a href="#">“To disable an object” on page 50.</a> <b>Note:</b> 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 <a href="#">“To enable an object” on page 51.</a>
	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 39.](#)
- [“Managing Owners” on page 44.](#)
- [“Managing Objects” on page 47.](#)
- [“Managing Assignments” on page 53.](#)

# 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 41.
- [“Advanced features for conflict resolution”](#) on page 43.

## 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 72.
- Default printer setting. See [“Simplify Printing”](#) on page 72 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 72 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 3-21 below through Figure 3-23 on page 41 for an example of a Deny taking precedence over an Allow.

Figure 3-21: 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.

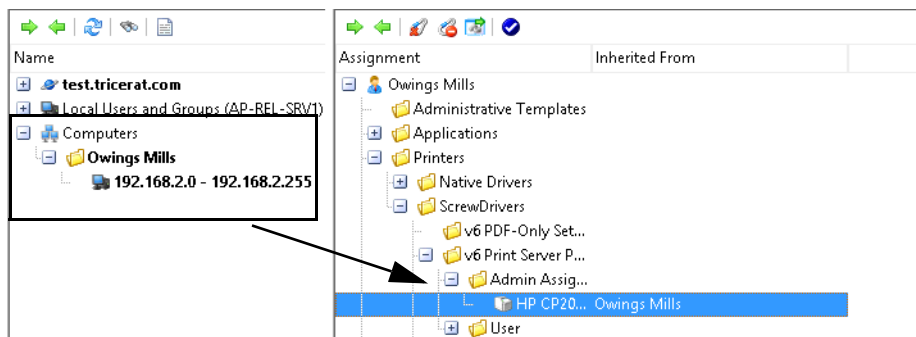




Figure 3-22: Printer assignment denied - The HP printer is now denied assignment for the IP address range.

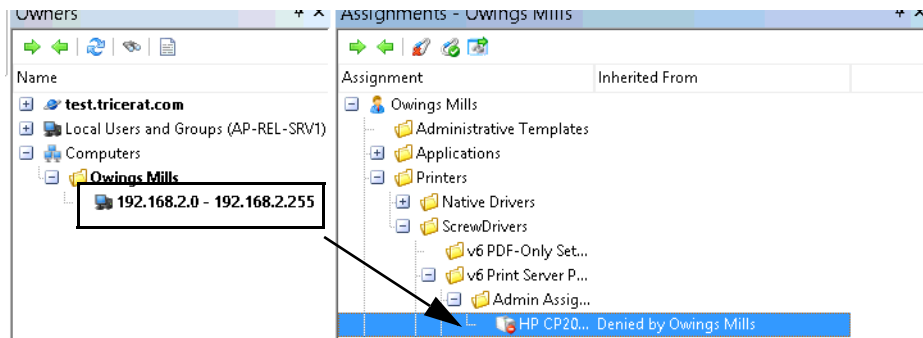


Figure 3-23: Assignment to SD Users group - Any user, however, who is a member of the SD Users group has been assigned this printer.



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 57](#).*

## 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 58 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 61](#).

### To search for owners in the Owners pane

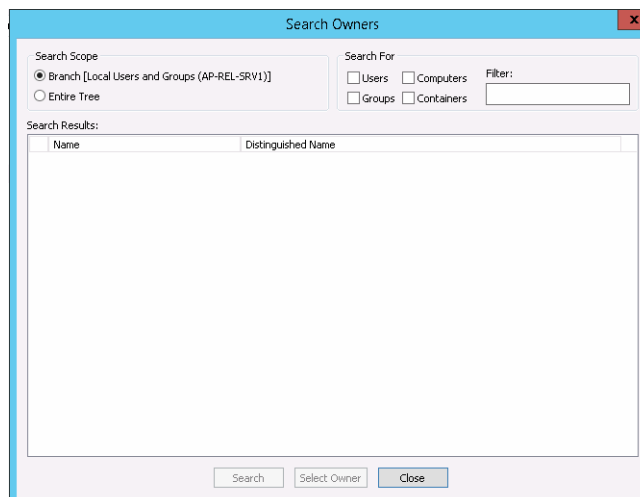
When you search for owners in the Owners pane, you can search a selected branch of the hierarchy, you can search the entire hierarchy, and you can search for one or more owner types. You can also specify a search filter to limit the search results.

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 3-24: Search Owners dialog box



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



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

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



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

4. Click Search.

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

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



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

The focus is changed to the Owners pane, and the owner is selected in the Owners pane. The display for the Assignments pane is updated accordingly with the objects and other configuration settings that have been assigned to or inherited by the owner. See [“The Assignments Pane” on page 32.](#)

## To add custom owners

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

Option	Description
Group	<p>Adds an entry for a Group custom owner named NewGroup(n), which can contain one or more members. The new entry is automatically selected after it is added to the Owners pane.</p> <ol style="list-style-type: none"><li>1. Click the New Group entry, and then name the group as appropriate.</li><li>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).</li></ol> <p><b>Note:</b> Groups can be nested.</p>

Option	Description
Computer	Adds an entry for a Computer custom owner named NewComputer(n) that is automatically selected after it is added to the Owners pane. Click the New Group entry, and then name the group as appropriate. <b>Note:</b> 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.
<b>Note:</b> 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 61](#).

## 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 3-25: 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 .




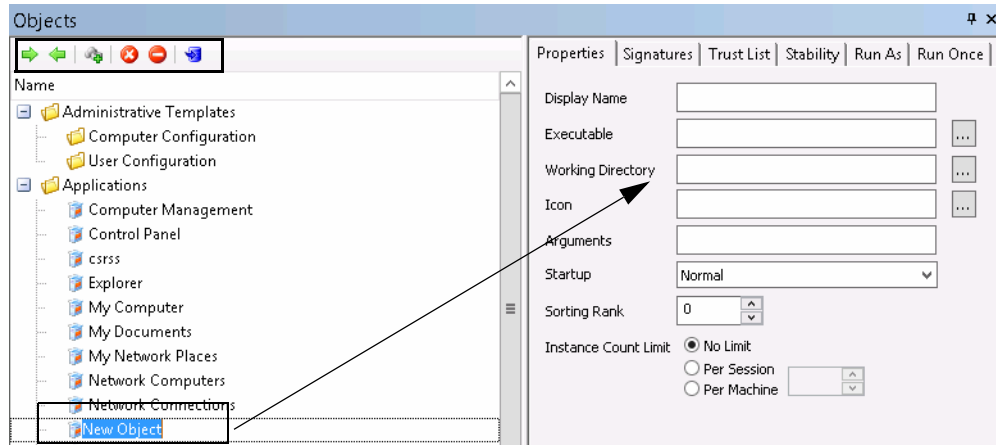
A placeholder named New Object is created in the Objects tree, and it is automatically selected. A tabbed form for specifying the object's configuration settings opens in the right sub-pane. The Objects pane toolbar is dynamically updated with icons, which from left to right are Delete Selected Item(s) , Disable Selected Item(s) , and Apply Changes . See [Figure 3-26 on page 48](#).

Figure 3-26: 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.*

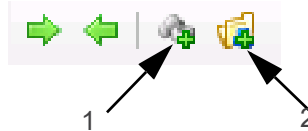
3. In the object form, modify the configuration settings for the object.
4. On the Objects pane toolbar, click the Apply Changes icon.



## 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 3-27: 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 49](#).
  - 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.

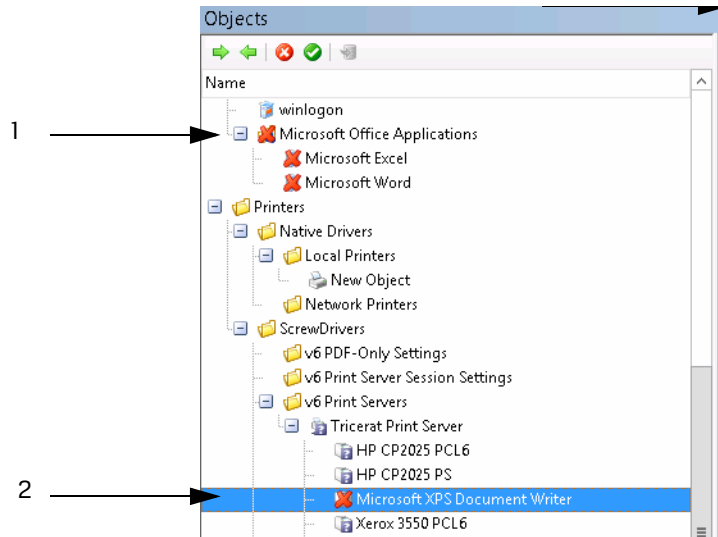
1. If you are disabling individual objects in an object group, expand the object groups folder to display the list of objects in it.
2. Do any of the following as needed:
  - To disable a single object or all the objects in a single object group, do one of the following:
    - In the Objects tree, right-click 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 3-28: 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.

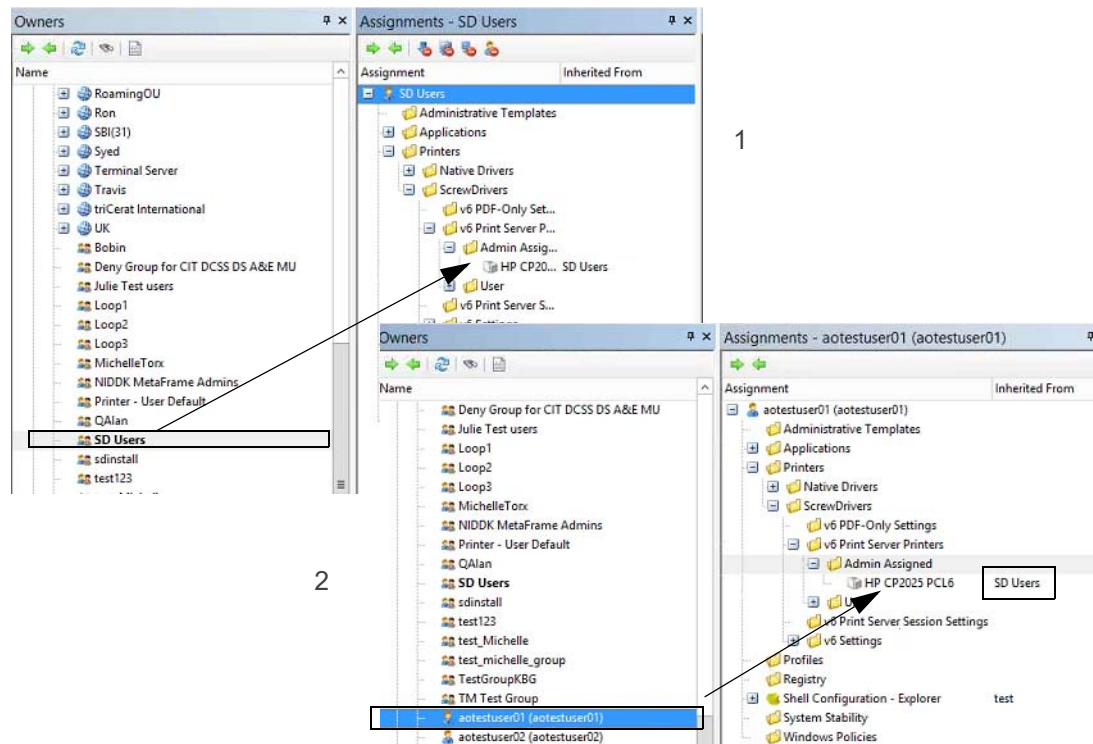


If a selected object/object group cannot be assigned to a branch of the Assignments pane, then as you drag the object over the branch, a Not Allowed icon is displayed.

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

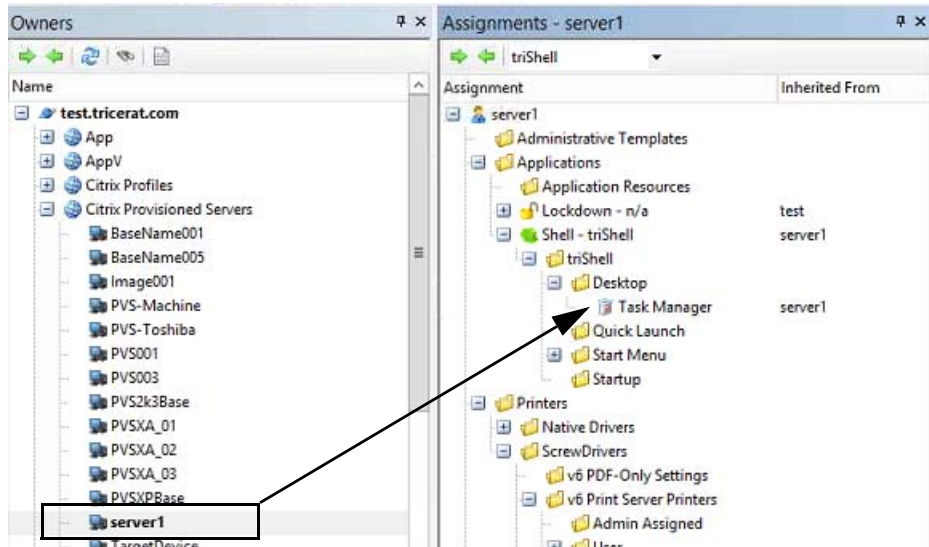
- The user assignments – Any object that is assigned directly to the user who is logging in, or any Group/Domain/OU of which the user is a member. For example, as shown in [Figure 3-29](#) below, (1) an HP printer is assigned directly to the SD Users group, and (2) any user who is a member of the SD Users group inherits the HP printer.

Figure 3-29: User assignment example



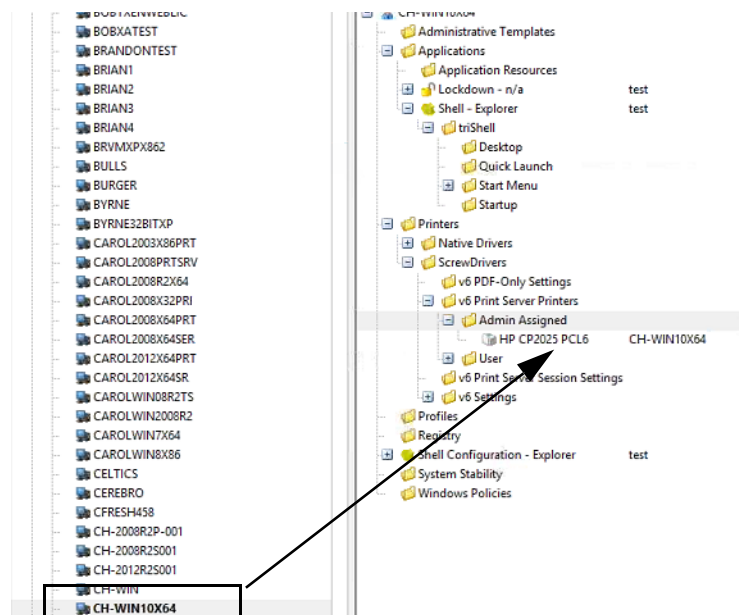
- The server assignments – Any object that is assigned directly to the server (Terminal Server or Virtual Desktop) or any Group/OU/IP range of which the server is a member. For example, in [Figure 3-30](#) below, the Task Manager application is assigned to the server at the Desktop level. This application is inherited on the desktop of any user who logs in to the server.

Figure 3-30: 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 3-31](#) 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 3-31: 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 72](#) 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 58](#).*

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



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

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

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

4. Click OK.

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

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



as any other locations that you have specified.



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

## To deny an assignment of an object


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



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



You can deny only inherited assignment for one owner at a time using the following procedure. To deny all inherited assignments for an owner in a single step, see [“Advanced features for conflict resolution” on page 43](#).

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

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

Figure 3-32: Example of a denied application object in the Assignments pane



The screenshot shows a table with two columns: 'Inherited From' and 'Denied by'. The first row contains a small icon, the text 'Microsoft Excel', and 'Denied by XEN-XP05'.

Inherited From	Denied by
 Microsoft Excel	Denied by XEN-XP05

## To permit an assignment of an object

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



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

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

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

## To block an owner from receiving an assignment



*The following settings are typically used only in advanced configurations. Contact [support@tricerat.com](mailto: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

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

This chapter covers the following topics:

- [“Auditing the Simplify Database” on page 61.](#)
- [“Generating Simplify Suite Reports” on page 66.](#)

# 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:

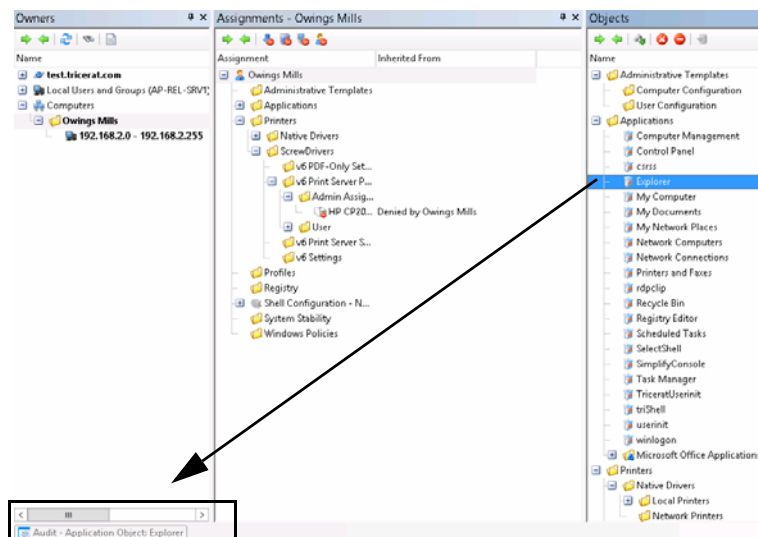
- **Audit Object** – This audit tracks the history of an object since its initial creation date.
- **Audit Owner** – This audit tracks the history of all the assignments ever made to an owner.
- **Searching Audit Data** – This option allows you to search for specific audit data based on user-specified 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 4-33: 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 62](#).



Remember, you can change the location of the Audit pane to better suit your working needs. See [“Customizing the Simplify Console Layout” on page 19](#).

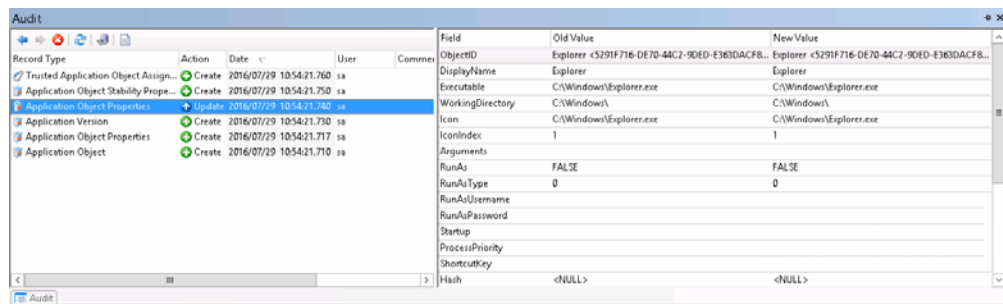


Every time you carry out an audit during a Simplify Console session, a new Audit tab does not open. Instead, the Audit tab is updated with the name of the entity that was most recently audited. You can use the options on the Audit toolbar to scroll through the all the audits that, by default, were carried 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 4-34: Audit tab







## Audit pane toolbar

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

Figure 4-35: Audit pane toolbar



Icon	Description
	<p>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.</p> <p><b>Note:</b> To change the default time period for an audit, see <a href="#">“Specifying Simplify Suite Options”</a> on page 25.</p>
	<p>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.</p> <p><b>Note:</b> To change the default time period for audits, see <a href="#">“Specifying Simplify Suite Options”</a> on page 25.</p>

Icon	Description
	Clear icon – Click this icon to clear all the records that are currently displayed in the Audit pane. <b>Note:</b> 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 <a href="#">“To search for audit data” on page 64.</a>
	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.

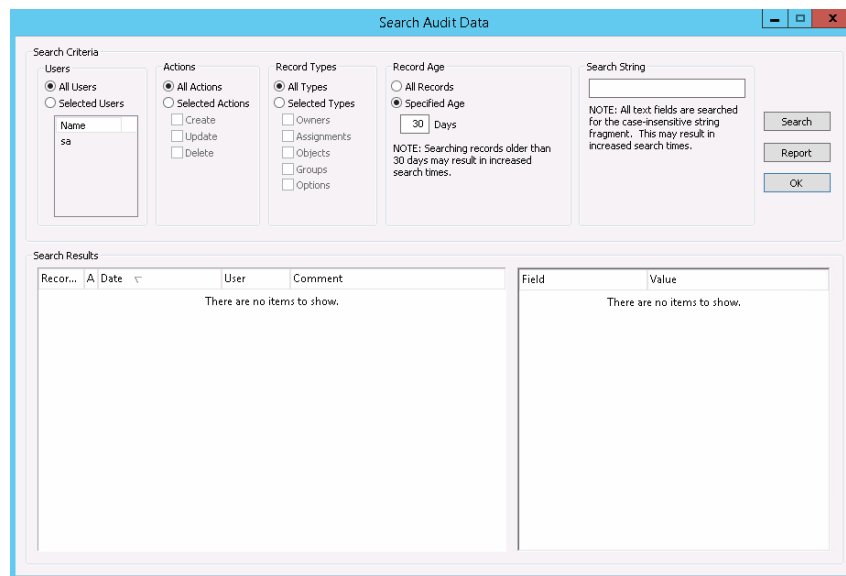
To change the sort order of the records in the History sub-pane, click any in column header. For example, to sort alphabetically by Action, click in the Action column. To sort in reverse alphabetical order by Action, click the Action column again.

## 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 61.](#)
2. On the Audit tab toolbar, click the Search Audit Data icon .

The Search Audit Data dialog box opens.

Figure 4-36: 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 4-37: Auditing an Owner record type*



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

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

# Generating Simplify Suite Reports

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

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



*Before you can generate any Simplify Suite report, a specific runtime version for Crystal Reports must be installed on the host computer. If this version is not installed, then after you click the Generate Report icon, a ReportViewer Warning dialog box opens, informing you of this, and providing a link to download the appropriate version of the installation files. You can also contact [support@tricerat.com](mailto: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 4-38](#) below and [Figure 4-39](#) on [page 67](#).



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

Figure 4-38: Assigned Objects by Owners report

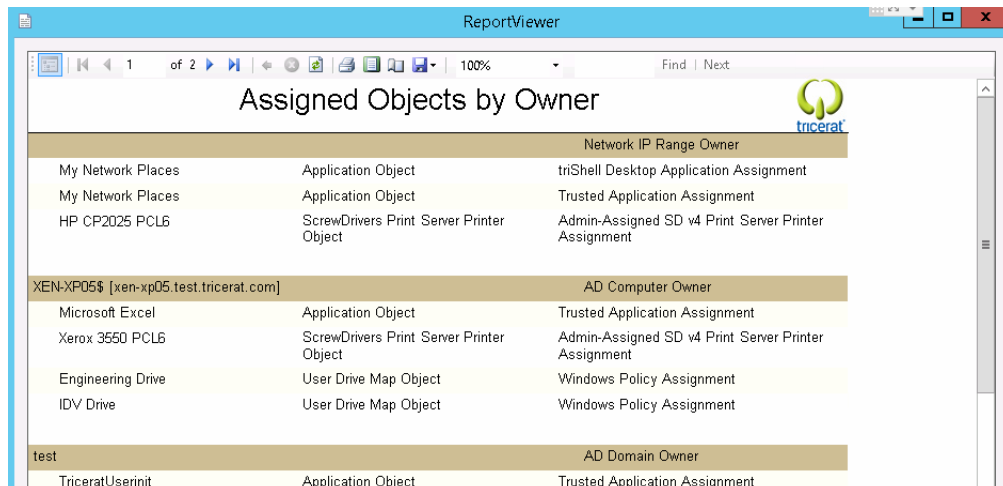


Figure 4-39: Assigned Owners by Object report

My Network Places		Application Object	
	Network IP Range Owner		triShell Desktop Application Assignment
	Network IP Range Owner		Trusted Application Assignment

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

TriceratUserinit		Application Object	
test	AD Domain Owner		Trusted Application Assignment

triShell		Application Object	
test	AD Domain Owner		Trusted Application Assignment

# Chapter 5

## Simplify Console Tools

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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.

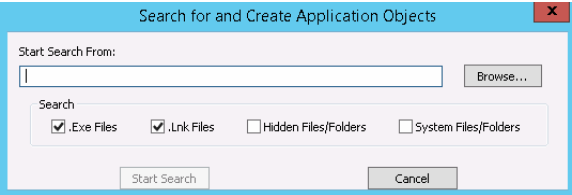
This chapter covers the following topics:

- [“The Simplify Console Tools Menu” on page 69.](#)
- [“The Manage Data Sources Tool” on page 71.](#)

# The Simplify Console Tools Menu

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

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

Option	Description
Find Apps to Import	<p>Opens the Search for and Create Application Objects dialog box. You use the options on this dialog box to search for applications that you want to import in to your Simplify Suite installation and create application objects for these imported applications.</p> <p><i>Figure 5-40: Search For and Create Application Objects dialog box</i></p> 
Options	See <a href="#">“Specifying Simplify Suite Options”</a> on page 25.

# 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.)

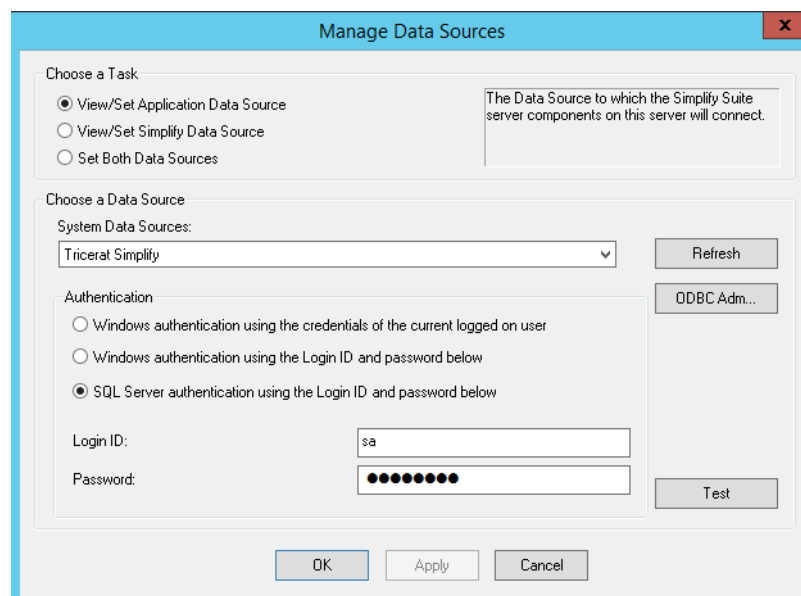


*Typically, these values are the same for both data sources, but in the event that they must be different, you can contact [support@tricerat.com](mailto:support@tricerat.com) for assistance.*

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 5-41: Manage Data Sources dialog box



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

# Section 2

## Simplify Printing

### Section Contents

- [Getting Started with Simplify Printing on page 73](#)
- [Managing Printer Objects in Simplify Printing on page 78](#)
- [Managing ScrewDrivers Objects and Settings on page 100](#)
- [ScrewDrivers Troubleshooting on page 110](#)



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



# Chapter 1

## Getting Started with Simplify Printing

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

This chapter covers the following topics:

- [“Accessing Simplify Printing” on page 74.](#)
- [“Client Interactions with Simplify Printing” on page 75.](#)

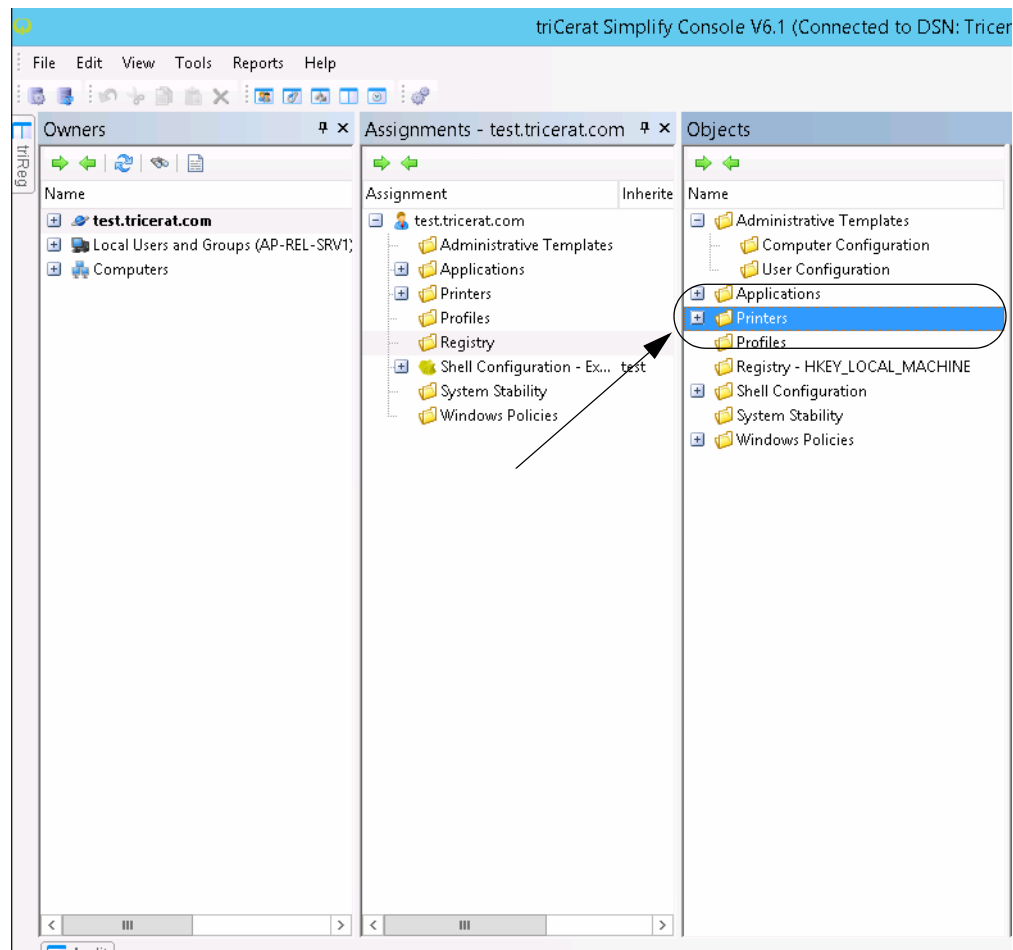
# Accessing Simplify Printing

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



For information about opening and logging in to the Simplify Console, see [“Simplify Console Overview” on page 13](#).

Figure 1-42: Printers entry in the Objects pane of the Simplify Console



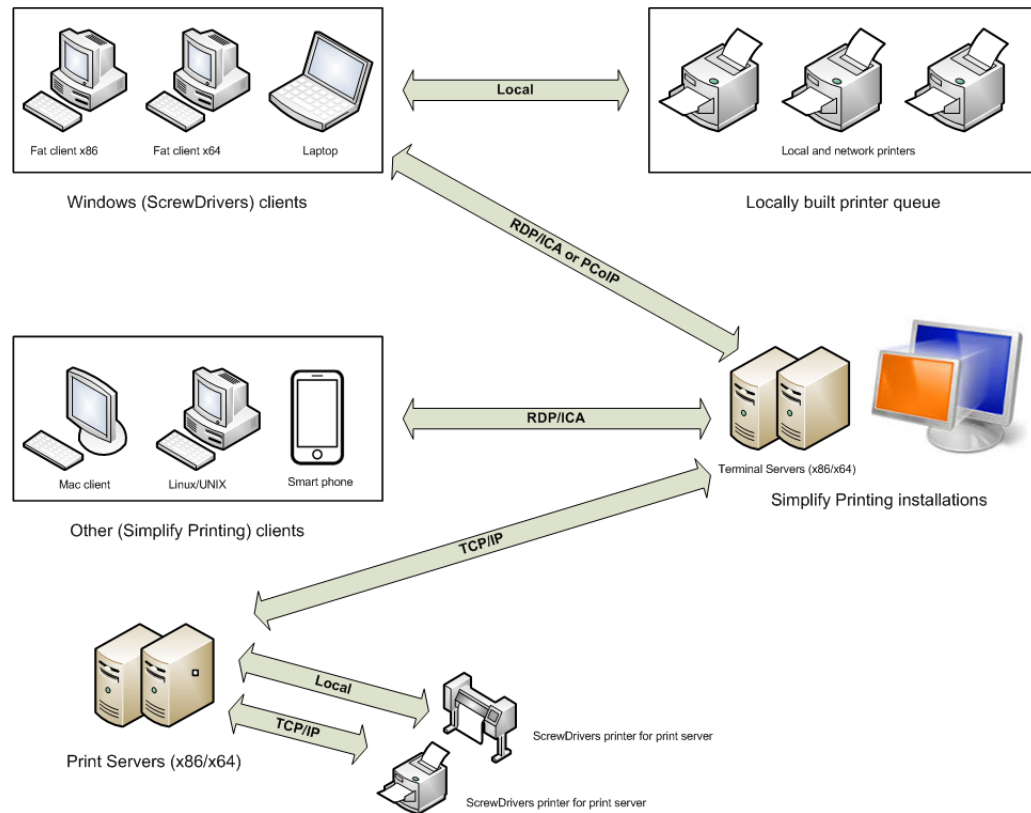
# Client Interactions with Simplify Printing

Simplify Printing is a print driver solution for Windows environments that uses Tricerat's ScrewDrivers technology and a Print Server plug-in to overcome remote printing limitations. The ScrewDrivers component of Simplify Printing is the client-server solution for remote printing limitations. The ScrewDrivers client can be installed on any Windows client. The ScrewDrivers client queries the print drivers to make a list of all the features (color, DPI, paper sizes, and so on) that are available for all the printers that are local to the Windows client, and then passes these settings to the ScrewDrivers Server. The ScrewDrivers Server then uses the ScrewDrivers virtual driver to virtualize the drivers. The Print Server plug-in can communicate directly with any print server printer. This means that clients on which the ScrewDrivers client cannot be installed, such as a macOS client using RDP or a smartphone can still print in Citrix and Terminal servers, virtual desktops, and so on directly to print server printers. See ["Print Server Printing through Simplify Printing"](#) on page 76.



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

Figure 1-43: Client interactions with Simplify Printing

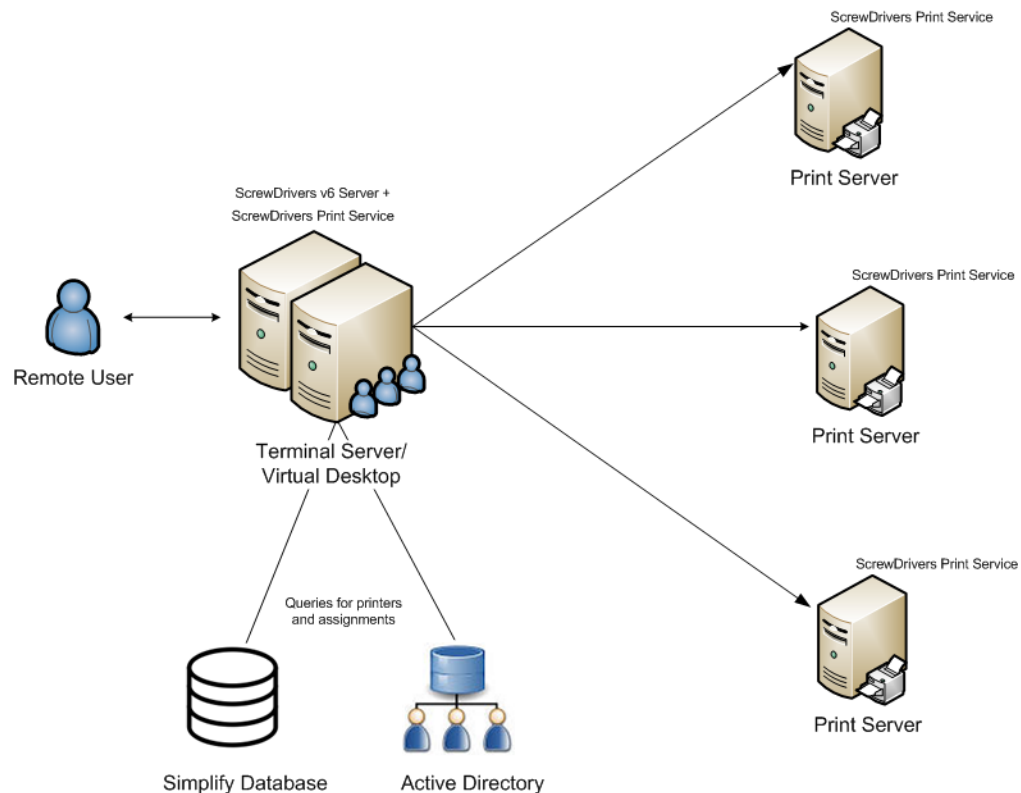


## Print Server Printing through Simplify Printing

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

As shown in [Figure 1-44](#) below, in a typical Simplify Printing installation, there are two components to print server printing through Simplify Printing – the Simplify Printing server (Terminal Server, Virtual Desktop, and so on) and the print server. The Simplify Printing server acts as the ScrewDrivers Server. Using the functions that are available in the Simplify Console, you can specify which users and/or groups are to be able to print to specific printers from the print servers. The print server component acts as the ScrewDrivers client. The print server builds its local and network printers to the ScrewDrivers Server. Any print job that a user starts goes directly from the Citrix and Terminal servers, virtual desktops, and so on to the print server. As a result, no spooling occurs on a client's local machine and all print information is sent between the servers instead of the server and the client.

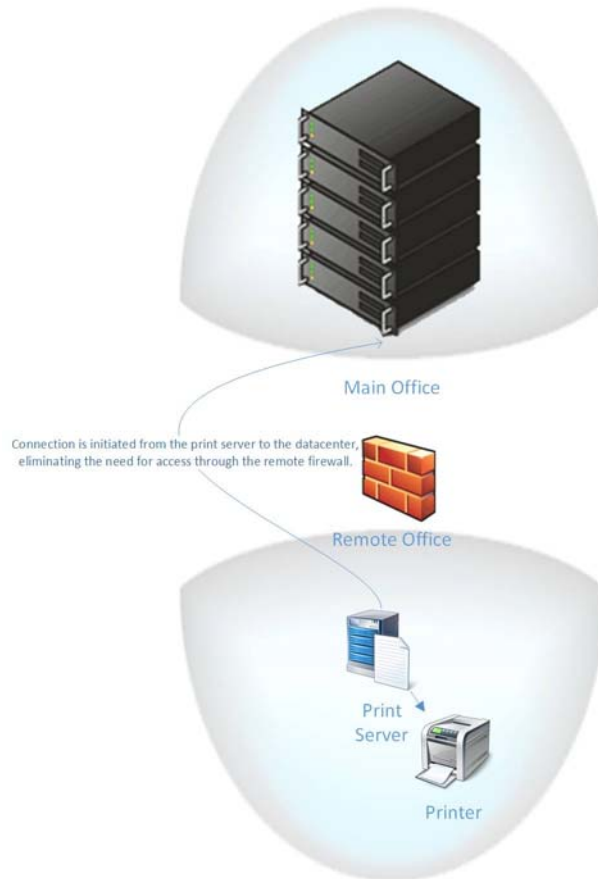
*Figure 1-44: Print server printing through Simplify Printing without proxy*



For some managed service provider (MSP) environments, however, a third component—a *Simplify Printing Print Server proxy feature*—might be required. As shown in [Figure 1-45](#) on [page 77](#), this proxy feature reverses the direction of the initial communication between the

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

Figure 1-45: Print server printing through Simplify Printing with proxy



# Chapter 2

## Managing Printer Objects in Simplify Printing

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

This chapter covers the following topics:

- [“Managing Print Server Printers” on page 79.](#)
- [“Viewing Print Server Print Jobs” on page 95.](#)
- [“Setting Up a Failover Print Server” on page 97.](#)

## Managing Print Server Printers

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

1. Adding the print server object and importing all the printers for the print server object. See [“To add the Simplify Print Server object and import the associated printers”](#) below.
2. Assigning the print server printers to the appropriate owners. See [“To assign the print server printers”](#) on page 85.
3. Configuring the assigned print server printers. See [“To configure the print server printers”](#) on page 88.

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

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



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



*To review how to add objects in the Simplify Console, see [“Managing Objects”](#) on page 47.*



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

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

In the right sub-pane of the Objects pane, the Object Form for the new print server object is displayed. The General tab is the open tab. The Hostname or IP is set to 0.0.0.0 and the port is set to the default value of 3550. See [Figure 2-1 on page 80](#). [Table 2-1 on page 80](#) details the options that are available on the five tabs of the print server object form.

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

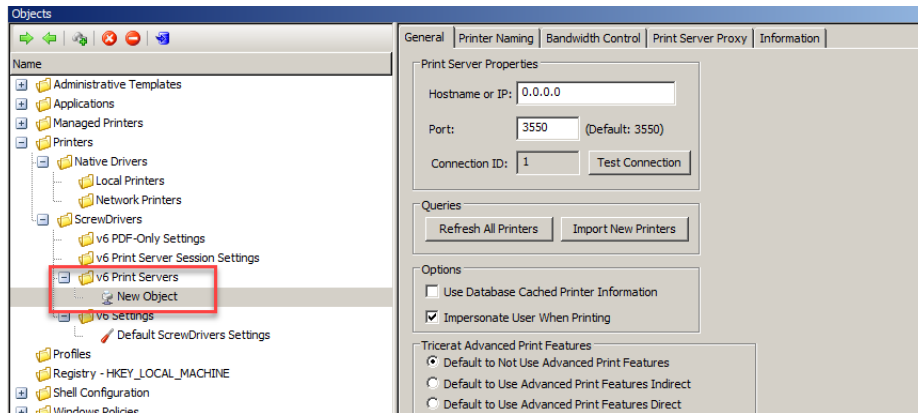


Table 2-1: Print Server Object form

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



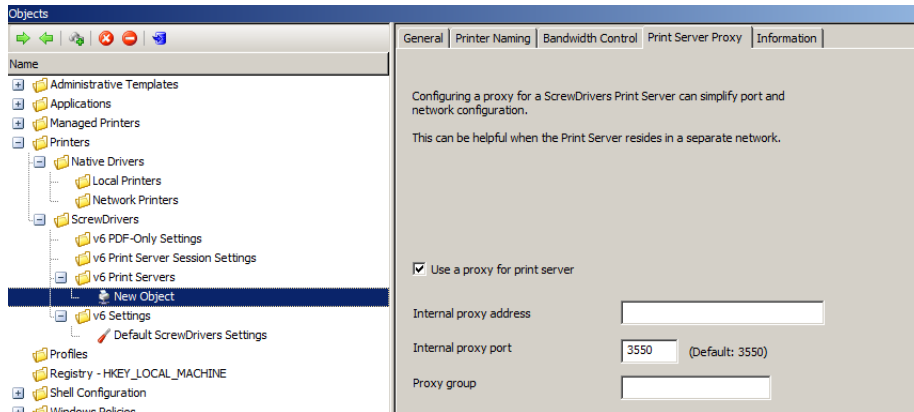
Table 2-1: *Print Server Object form (Continued)*

Option	Description
Impersonate User When Printing	Selected by default and Tricerat recommends that you leave this option selected. When a job is sent to the print spooler, the print job will show as being originated by the user instead of by the system.
<b>Tricerat Advanced Print Features</b> - You can enable/disable advanced printer features on a per printer basis, or at the global level (all printers assigned to a selected Simplify Print Server object. See <a href="#">"To enable/disable access to the advanced features for a print server printer"</a> on page 92.	
Default to Not Use Advanced Print Features	Selected by default. Disables access to the advanced features for <i>all</i> the printers that are assigned to the Simplify Print Server object. For access to the advanced features for all the printers to the Simplify Print Server object, one of two options must be selected: <ul style="list-style-type: none"> <li>• <a href="#">"Default to Use Advanced Features Indirect."</a></li> <li>• <a href="#">"Default to Use Advanced Features Direct."</a></li> </ul>
Default to Use Advanced Features Indirect	Select this object to enable access to the advanced features for <i>all</i> the printers that are assigned to the Simplify Print Server object. When this option is selected, after a user clicks Preferences in the Print dialog box, the Printing Preferences dialog box opens with an Advanced Print Features tab. The user then must open the Advanced Print Features tab, and click Show UI to open the Manufacturer's Print dialog box for the selected printer. The dialog box displays the advanced features that the manufacturer supports for the printer.
Default to Use Advanced Features Direct	Select this object to enable access to the advanced features for <i>all</i> the printers that are assigned to the Simplify Print Server object. When this option is selected, after a user clicks Preferences in the Print dialog box, the Printing Preferences dialog box is bypassed and instead, the Manufacturer's Print dialog box for the selected printer opens immediately. The dialog box displays the advanced features that the manufacturer supports for the printer.
Disable All	Select this option to disable access to the advanced features for all the printers that are assigned to the Simplify Print Server object.
<b>Printer Naming tab</b> – Determines the format of the printer names that are to displayed to your users. You can set the printer naming scheme globally (the same print server naming scheme is applied to all the print server printers), or you can assign the naming scheme on a per printer basis. See <a href="#">"To set the printer naming scheme"</a> on page 88.	
<b>Bandwidth Control tab</b> - If the Simplify Print Server object is connected over a congested network, then to limit the amount of print data that is sent per minute, you can configure the bandwidth for the server on this tab. Note that limiting bandwidth for the print server might reduce the printing throughput for the server.	
<b>Print Server Proxy tab</b> - If you are using a Tricerat Print Server proxy, then enter the internal proxy address and the proxy group name on this tab.	
<b>Information tab</b> – Read-only tab that displays information about the server on which the print server is hosted such as the OS version, the default language information, and so on.	

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

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

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



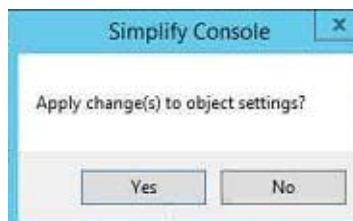
4. Enter the name for the new Print Server object.



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

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

Figure 2-3: Simplify Console message



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

If the connection is successful, then a Simplify Console message opens, indicating this. See [Figure 2-4 on page 83](#).



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

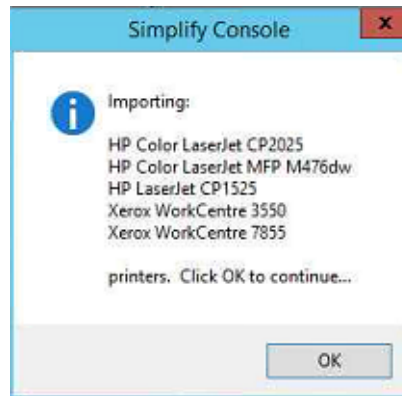
Figure 2-4: Simplify Console Test Connection successful message



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

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

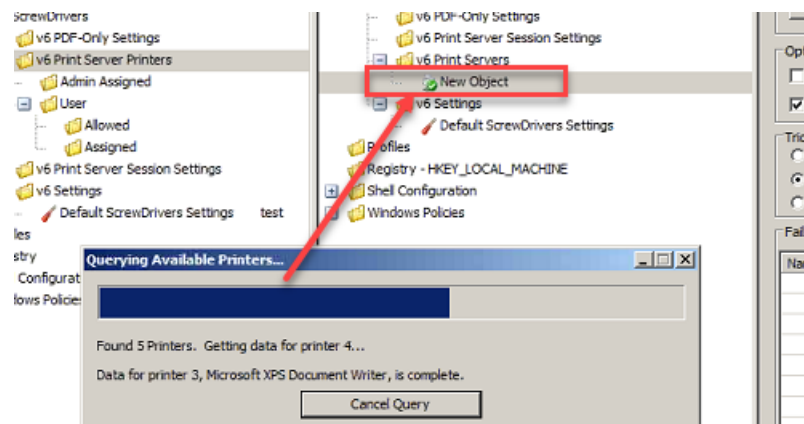
Figure 2-5: Simplify Console Import Printers message



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

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

Figure 2-6: Querying Printers message





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

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

Figure 2-7: Imported printers with APF Settings

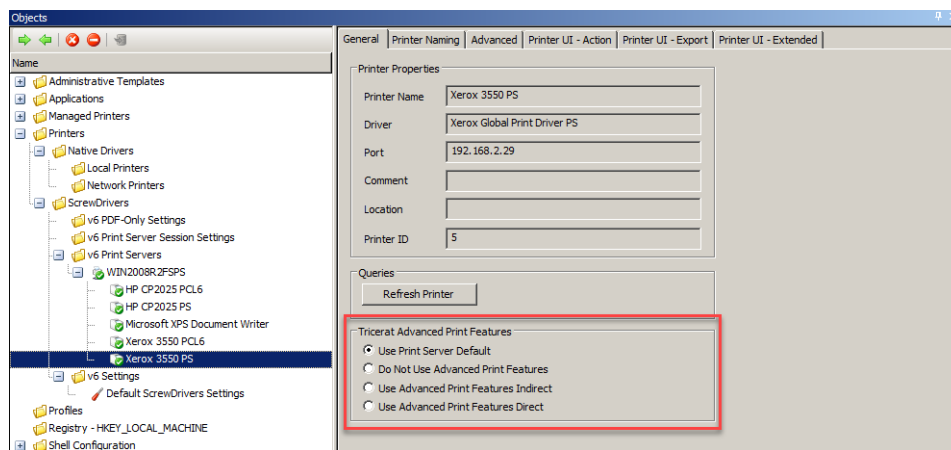
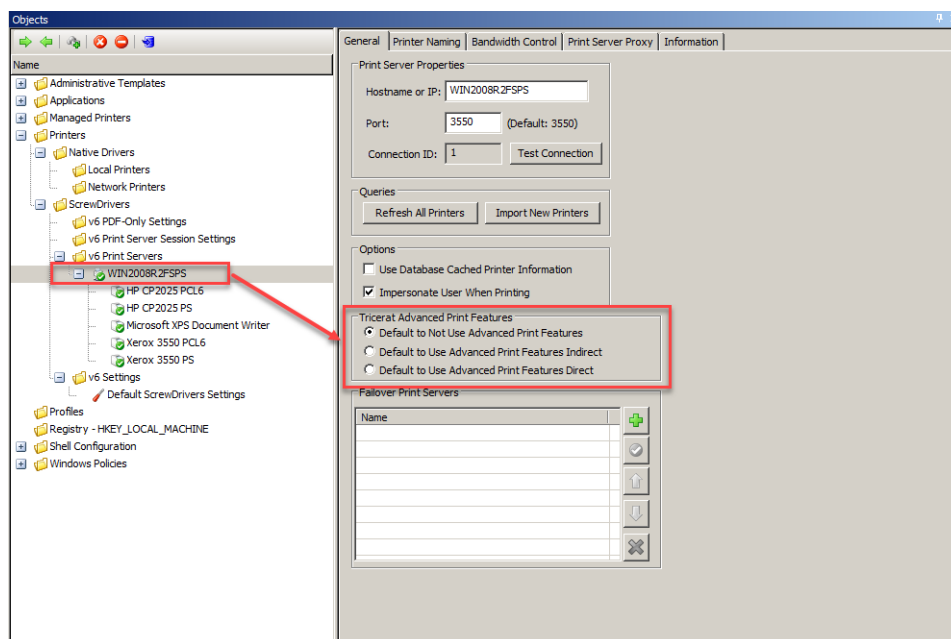


Figure 2-8: Imported printers with APF Settings at Print Server object level



10. Continue to “To assign the print server printers” on page 85.

## To assign the print server printers

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

- You can directly assign the printer. See [“To directly assign a print server printer to an owner”](#) below.
- You can dynamically assign the printer. See [“To create an owner for a printer assignment \(Proximity Printing\)”](#) on page 87.

### To directly assign a print server printer to an owner

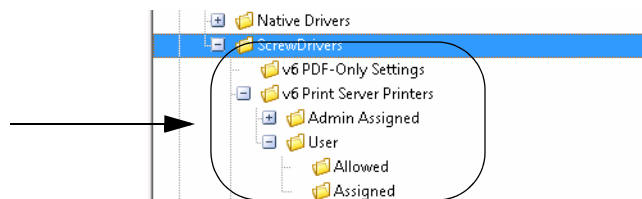
You can directly assign a print server printer to an owner in one of the three locations in the Assignments pane:

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



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

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





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

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

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



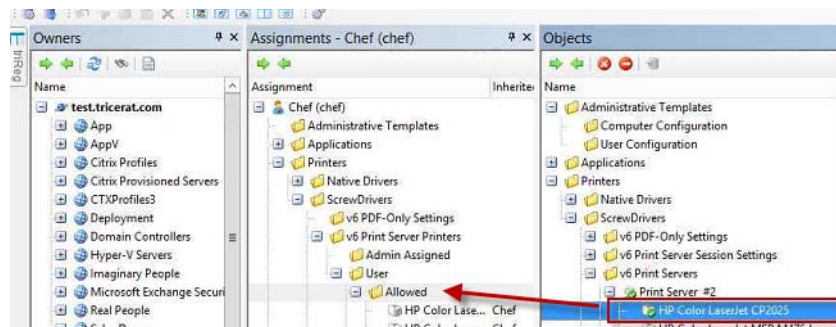
If the needed owner is not available in your Active Directory, then you can always create it. See [“To create an owner for a printer assignment \(Proximity Printing\)” on page 87.](#)

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



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

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

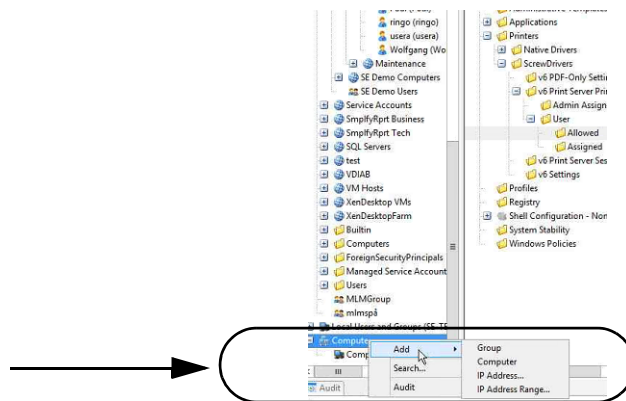


## To create an owner for a printer assignment (Proximity Printing)

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

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

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



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

Option	Description
Group	An organizational grouping of one or more groups, computers, IP addresses, and/or IP address ranges. After you name the group, you must add owners to the group. To add owners, right-click the group name, and on the context menu that opens, select one of the following as appropriate: <ul style="list-style-type: none"> <li>• Add   Computer (See “Computer” below.)</li> <li>• Add   IP Address (See “IP Address” below.)</li> <li>• Add   IP Address Range (See “IP Address Range” on page 88.)</li> </ul> You can nest groups within other groups.
Computer	The complete device name for the client machine from which the owner is connecting to Simplify Printing, and not the fully qualified domain name. After you enter the device name, you can make assignments to the device in the same manner that you make assignments to a group, a user, and so on. You can use wildcard characters in the device name, including a question mark (?) to specify a single character and an asterisk (*) to specify multiple characters.
IP Address	The IP address for the client machine from which the owner is connecting to Simplify Printing. This is a single IP address.

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

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



To review how to assign objects to an owner, see [“Managing Assignments” on page 53](#).

## To configure the print server printers

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



For detailed information about assignment locations for print server printers, see [“To assign the print server printers” on page 85](#).

## To set the printer naming scheme

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

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

2. Click the Printer Naming tab to open it.

The tab displays all the options that are available for specifying the printer naming scheme. If the tab is opened for a print server printer, than an additional option, (1) Use Print Server’s Naming Scheme, is displayed at the top of the tab, and by default, it is selected. See [Figure 2-12 on page 89](#).



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

1 →  Use Print Server's Naming Scheme

**Naming Scheme**  
Determines how printers are named on the server.

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

Printer ( ) Machine ( ) Session ( )

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

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

**Modifications**

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

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

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

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

Replace Space ( ) in the printer name with: -

3. Do one of the following:

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



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

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

Step	Action
If you are implementing a default naming scheme as-is.	N/A.
If you are implementing a default printer naming scheme, but you want to edit the scheme.	Do one or both of the following as appropriate: <ul style="list-style-type: none"> <li>• Select “Limit name component lengths,” and then set the maximum value for any or all of the indicated components (Printer, Machine, and/or User.) The default value is ten.</li> <li>• Select which options in the printer name are to be replaced, and then leave a default replacement value as-is, or modify it as needed. For example, if you select “Replace backslashes (\) in the printer name with _,” then, by default, an underscore replaces every backslash in the printer name. You can leave the underscore as-is, or you change it to another value such as an asterisk (*).</li> </ul>
If you are implementing a custom printer naming scheme.	Continue to <a href="#">“To define a custom printer naming scheme” on page 90.</a>

### To define a custom printer naming scheme

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

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



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

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

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

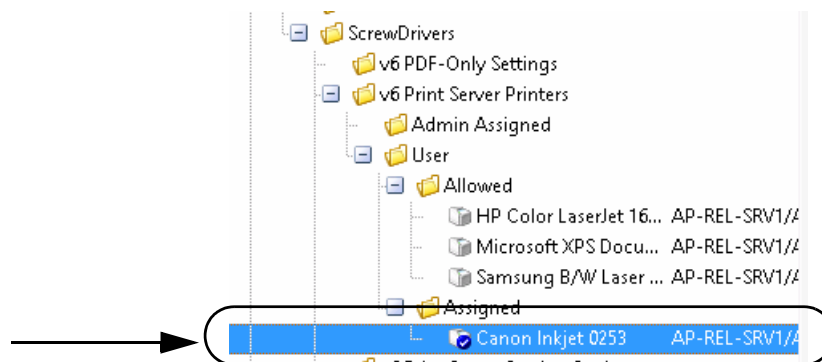
## To set a default printer for an owner

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

1. In the Owners pane in Simplify Console, select the owner (user or group) for which you are setting the default printer.  
  
The selected owner is displayed at the top of the Assignment hierarchy in the Assignments pane.
2. In the Assignments pane, do the following:
  - To show all Admin Assigned print server printers, expand Printers > ScrewDrivers > v6 Print Server Printers > Admin Assigned.
  - To show all User Assigned print server printers, expand Printers > ScrewDrivers > v6 Print Server Printers > User > Assigned.
3. Right-click any single Admin Assigned or User Assigned print server printer, and on the context menu that opens, click Set as Default.

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

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



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

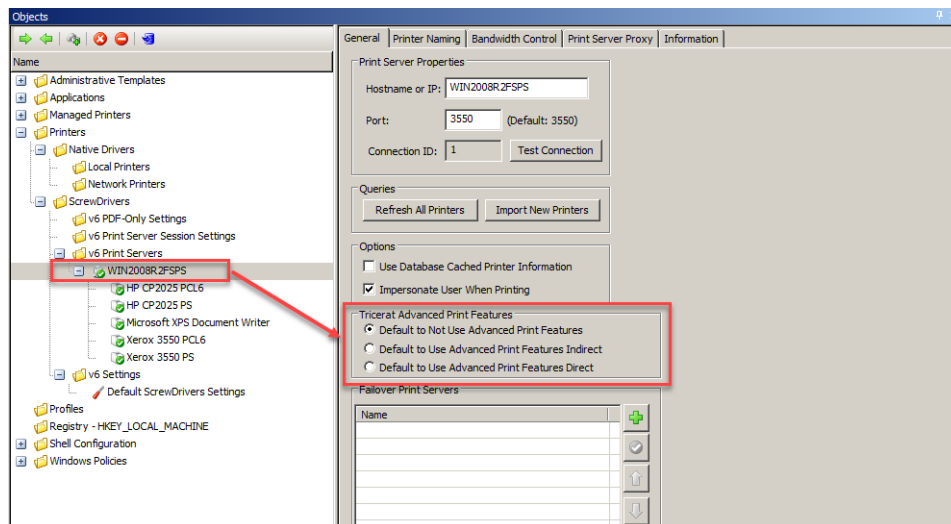
Simplify Printing supports advanced features that are uniquely defined by each printer manufacturer such as secure printing, stapling, and so on. This function is made possible by providing access for the user to the manufacturer's Print dialog box during the user's session while still using the ScrewDrivers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

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

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

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

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



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

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

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

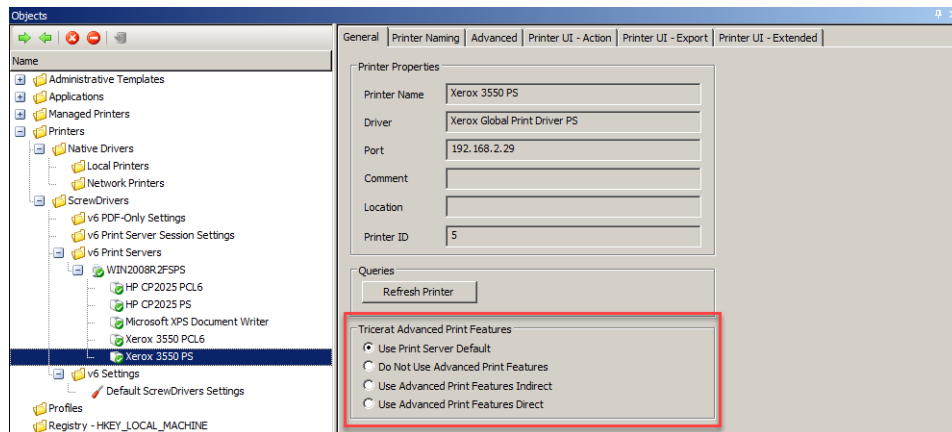
Table 2-2: *Tricerat Advanced Print Features, selected at the Simplify Print Server object level*

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

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

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

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



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

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

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

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

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

## Viewing Print Server Print Jobs

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



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

### To view print server print jobs

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

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

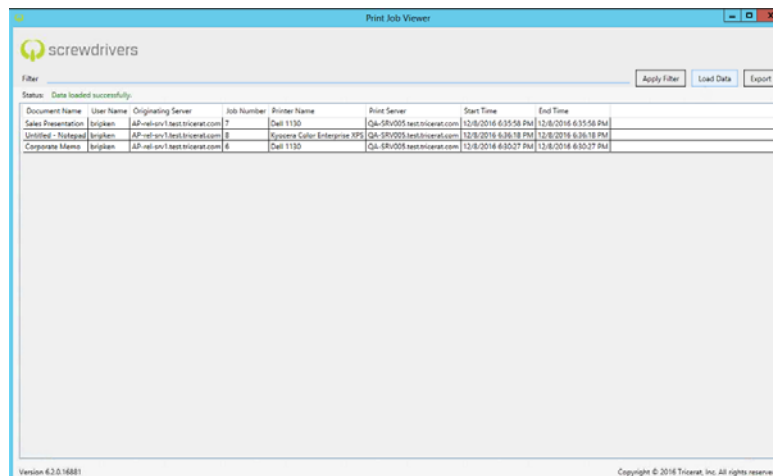
Figure 2-16: Print Job Viewer desktop shortcut



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

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

Figure 2-17: Print Job Viewer



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



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

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



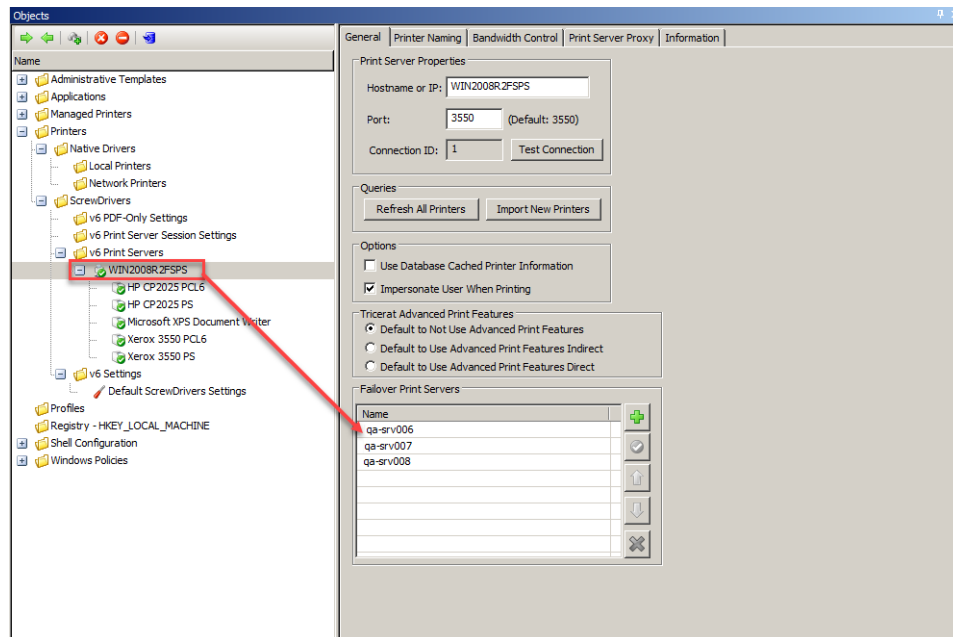
# Setting Up a Failover Print Server

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

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

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

Figure 2-18: Failover Print Servers



## To set up a failover print server

1. Add, assign, and configure the necessary primary print server printers for your users.  
See [“Managing Print Server Printers” on page 79](#).

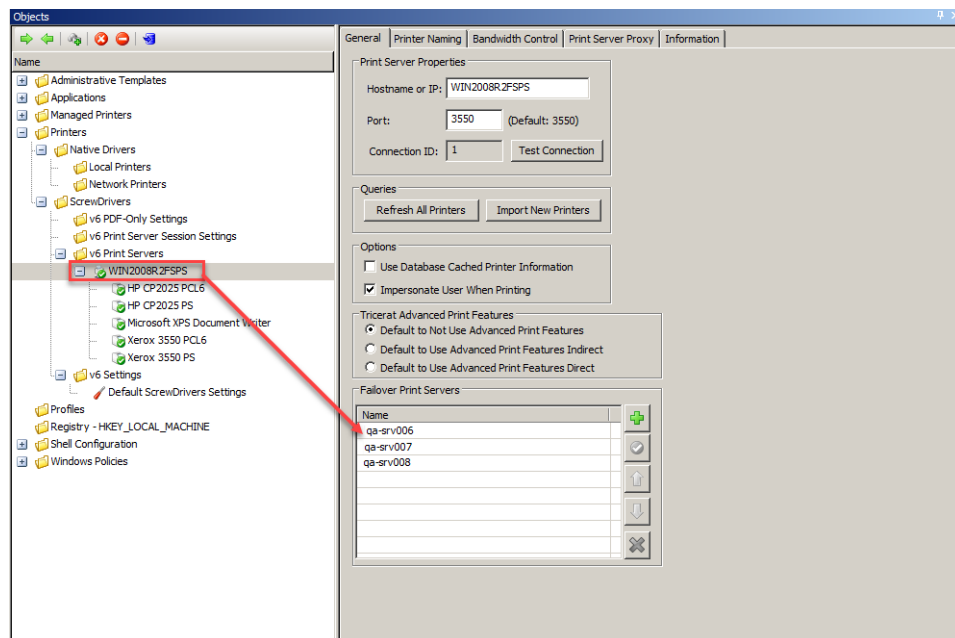


*The failover print servers must have the same print queues, the same queue names, the same print drivers, and so on as the primary print servers.*

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

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

Figure 2-19: Failover Print Servers

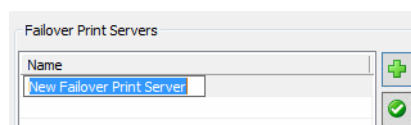



3. For each failover print server printer that is to be assigned to the selected primary print server, do the following:

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

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

Figure 2-20: New Failover Print Server entry



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

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

Figure 2-21: Connection Successful message



- d. Click OK.

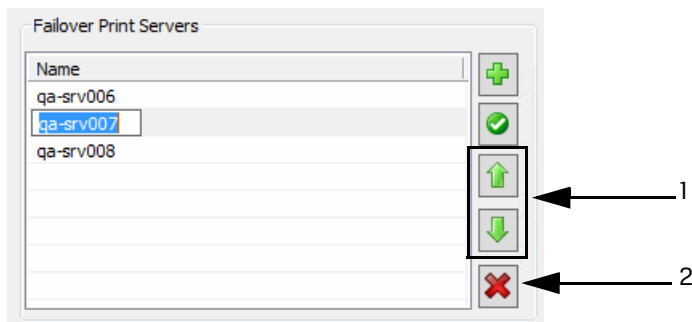
The message closes and the failover print server is now connected and active for the selected primary print server.

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



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

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



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

# Chapter 3

## Managing ScrewDrivers Objects and Settings

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

This chapter covers the following topics:

- [“Assigning PDF-Only Settings to an Owner” on page 101.](#)
- [“Assigning Default ScrewDrivers Settings to an Owner” on page 103.](#)

## Assigning PDF-Only Settings to an Owner

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

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

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

### To assign and configure PDF-only settings to an owner

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

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



To review how to add objects in the Simplify Console, see [“Managing Objects” on page 47](#).

Figure 3-1: PDF printer object form

Setting	Value	Category
Save Mode	Deny	mode: Display Save Dialog
Destination	Deny	path: [ ] Help
If File Exists	Deny	op: Overwrite

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

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

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



To review how to assign objects to an owner, see [“Managing Assignments” on page 53](#).

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



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

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

5. Leave the printer naming scheme set to the default value of Printer Name (MACHINE:SESSION), or optionally, modify the printer naming scheme. See [Step 4 of “To set the printer naming scheme” on page 88](#).

# Assigning Default ScrewDrivers Settings to an Owner

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

## To assign and configure the default ScrewDrivers settings

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

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

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

2. Configure the Default ScrewDrivers Settings.

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

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

- In the Owners pane in Simplify Console, select the owner (user or group) to which you are assigning the settings.  
  
The selected owner is displayed at the top of the Assignment hierarchy in the Assignments pane.
- Assign the Default ScrewDrivers Settings to the selected owner.



To review how to assign objects to an owner, see ["Managing Assignments" on page 53](#).



# Appendix A

## ScrewDrivers Troubleshooting

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

This appendix covers the following topics:

- [“General Troubleshooting Considerations” on page 106.](#)
- [“ScrewDrivers Server Troubleshooting” on page 107.](#)
- [“ScrewDrivers Client Troubleshooting” on page 110.](#)

# General Troubleshooting Considerations

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

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

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

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

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

# ScrewDrivers Server Troubleshooting

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

## Printers are not building for any user



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

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

1. Navigate to the following directory: C:\Windows\System32\spool\drivers\w32x86\3
2. Rename the following files with an extension of .old: sd6drv.dll and sd6ui.dll.
3. Reboot the print server.
4. Delete the two "old" files that you renamed in [Step 2](#).
5. Navigate to the following directory: C:\Tricerat\ScrewDrivers Server v6.
6. Run the following executables in the order indicated:
  - install\_driver.exe (installs the print driver)
  - install\_port.exe (installs the printer port)



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

- setsec\_server.exe (sets the security for the server components)

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

## Some printers are not deleted when the user logs off

You can clear the spool directory.



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

1. Open the Services dialog box: Control Panel > Administrative Tools > Services.
2. Stop the Windows Print Spooler service.

3. In Windows\System32\Spool\Printers, delete all files.
4. Start the Windows Print Spooler service.
5. Under Printers and Faxes on the server, delete any printers that are not installed directly on the server.

## Output issues with fonts and/or graphics

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

- Upgrade the print driver on the ScrewDrivers client.
- Enable Print-As-Image.

### Upgrade the print driver

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

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

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

### Enable Print-As-Image

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

To enable Print-As-Image mid-session

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

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

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

## Users are seeing duplicate printers

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

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

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

# ScrewDrivers Client Troubleshooting

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

## ScrewDrivers not building during a session

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

- Client updates
- Incompatible ScrewDrivers client version

### Client updates

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

- For an ICA client: C:\Program Files\Tricerat\Simplify Printing\ScrewDrivers Client v6\install\_ica.exe.
- For an RDP client: C:\Program Files\Tricerat\Simplify Printing\ScrewDrivers Client v6\install\_rdp.exe.

### Incompatible ScrewDrivers client version

The version of ScrewDrivers client that is currently installed on a workstation is displayed on the About tab of the ScrewDrivers Client Control Panel. (See [“The ScrewDrivers Client Control Panel” on page 35.](#)) If the ScrewDrivers client that is installed on a workstation is not the most current version, then you have two options:

- You can download the most recent version from the Tricerat website at <http://www.tricerat.com/support-center/downloads/printing-clients>, and manually update the client version.
- You can enable automatic client updates on the server side, and prevent the client from ever being out of date. See [“Enable automatic client updates” in “The ScrewDrivers Server Control Panel, Advanced Tab” on page 29.](#)

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

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

## Output issues with fonts and/or graphics

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

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

### Upgrade the print driver

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

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

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

### Enable Print-As-Image

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



*If needed, you can also set Print-As-Image to Force on the ScrewDrivers Server and this option then is applied to all client printers in a single step.*

#### To enable Print-As-Image mid-session

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

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

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

## Default printer not being set correctly for one or more users

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