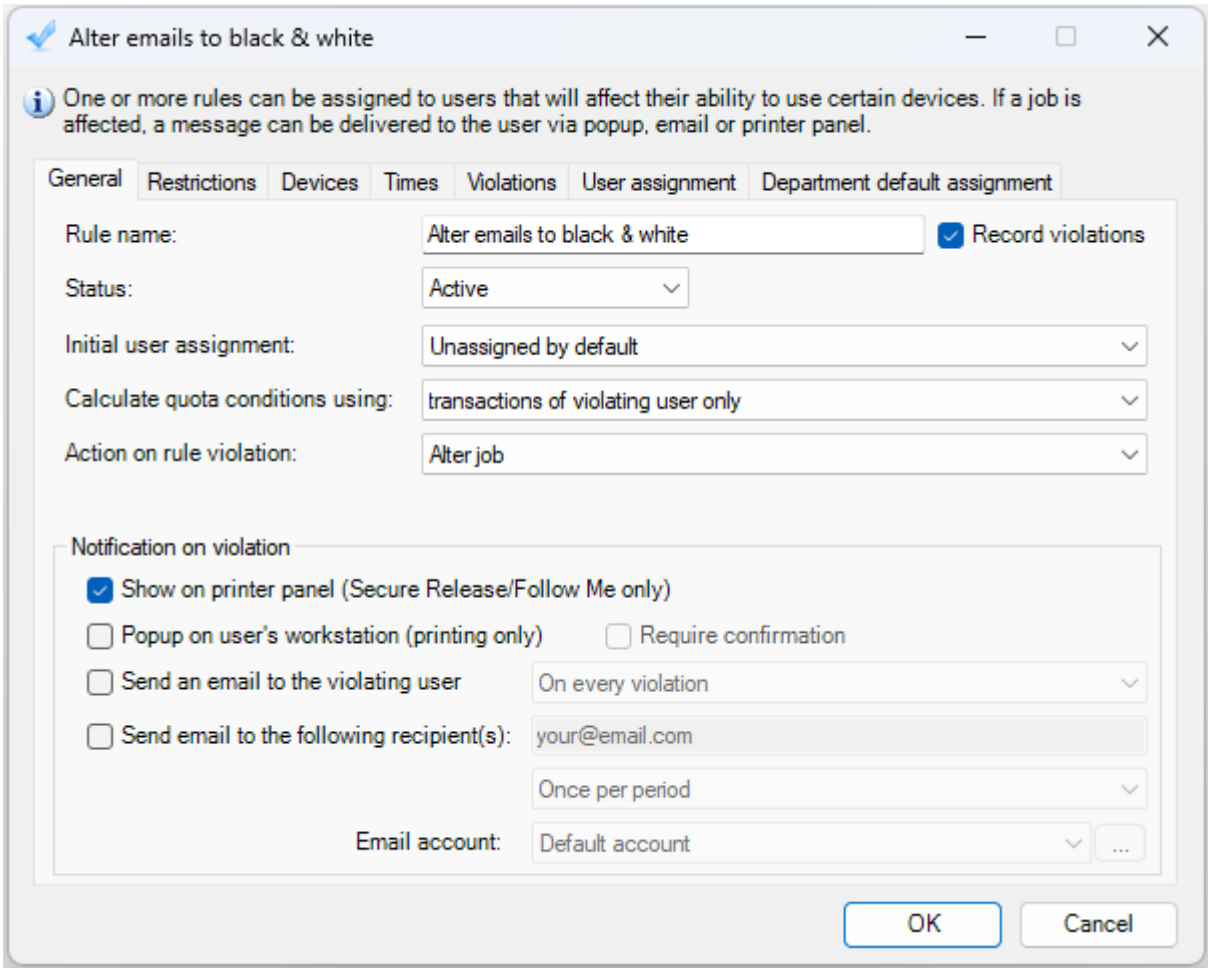
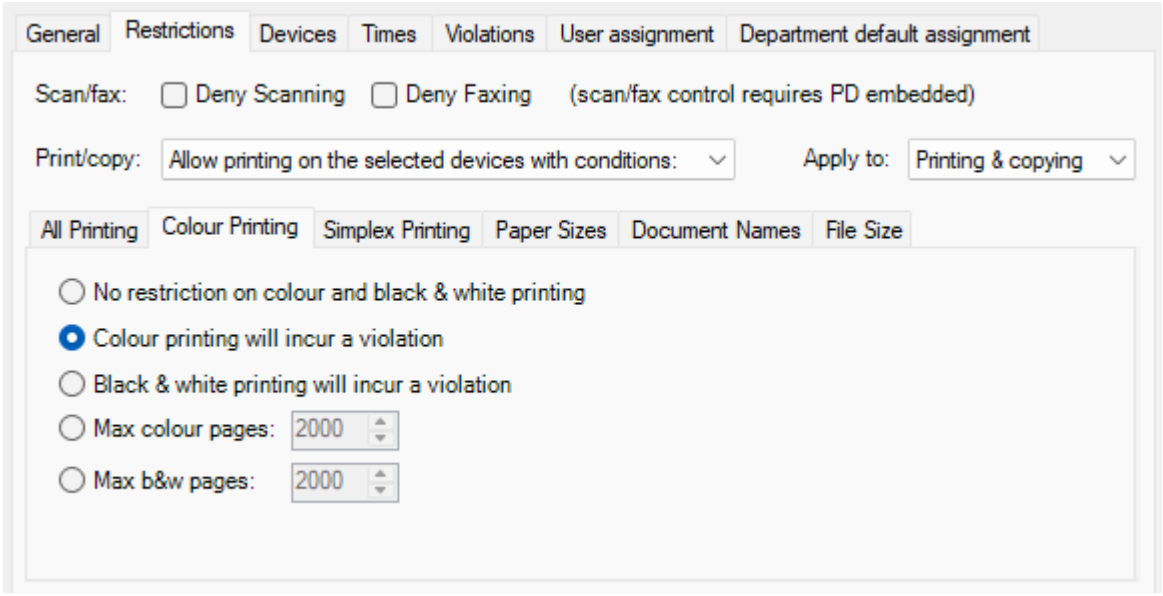
How to force all printed emails to black & white

Create a Rule

- Open Resource Manager.
- Click on the **Rules** node**.**
- On the right hand side, click the **Add** button.
- In the **New Rule** window, on the **General** tab, type **Alter emails to black & white** (or any descriptive name you like) into the **Rule name** textbox.
- Ensure the option **Unassigned by default** is selected in the **Initial user assignment** dropdown.
    - Note: If you want this Rule to apply to all users, then choose **Assigned by default** from the dropdown. There will be no need to apply this Rule to users.
- In the **Action on rule violation** dropdown choose **Alter job.**
- In the **Notification on violation** frame, choose the appropriate method of notifying the user that their job will be altered to black & white:
    - **Show on printer panel (Secure Release/Follow Me only)**: When they release an email print job they will see a message.
    - **Popup on user's workstation (printing only):** If the user has the PDAgentClient application installed on their workstation, they can get a popup when they print an email in colour.
    - **Send an email to the violating user**: If the user's email address record is filled, they will receive an email when they print an email in colour. Specify the frequency at which the user will receive email notifications:
        - **On every violation**: They will receive an email every time the Rule is violated.
        - **Once per period**: They will receive an email once per period (the period is specified at the bottom of the **Restrictions** tab).
        - **Once per period per device:** For each device on which they violate this Rule, they will receive one notification per period.
    - **Send an email to the following recipient(s)**: Any email addresses entered here will receive an email when the user prints an email in colour. Specify the frequency that the recipients will receive notifications:
        - **On every violation**: They will receive an email every time the Rule is violated.
        - **Once per period**: They will receive an email once per period (the period is specified at the bottom of the **Restrictions** tab).
        - **Once per period per device:** For each device on which a user violates this Rule, they will receive one notification per period (the period is specified at the bottom of the **Restrictions** tab).
        - **Once per period per user:** For each user that violates this Rule, the recipients will receive one notification per period.

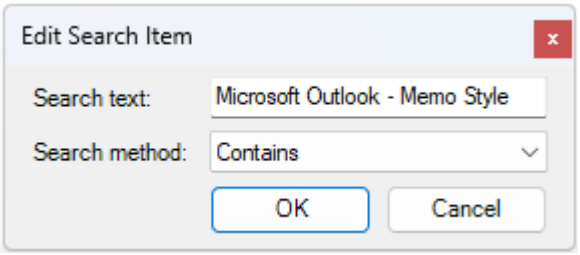


- Click the **Restrictions** tab.
- Select the **Allow printing on the selected devices with conditions** from the Print/copy option.
- Click the **Colour Printing** tab.
- Choose the C**olour printing will incur a violation** option.

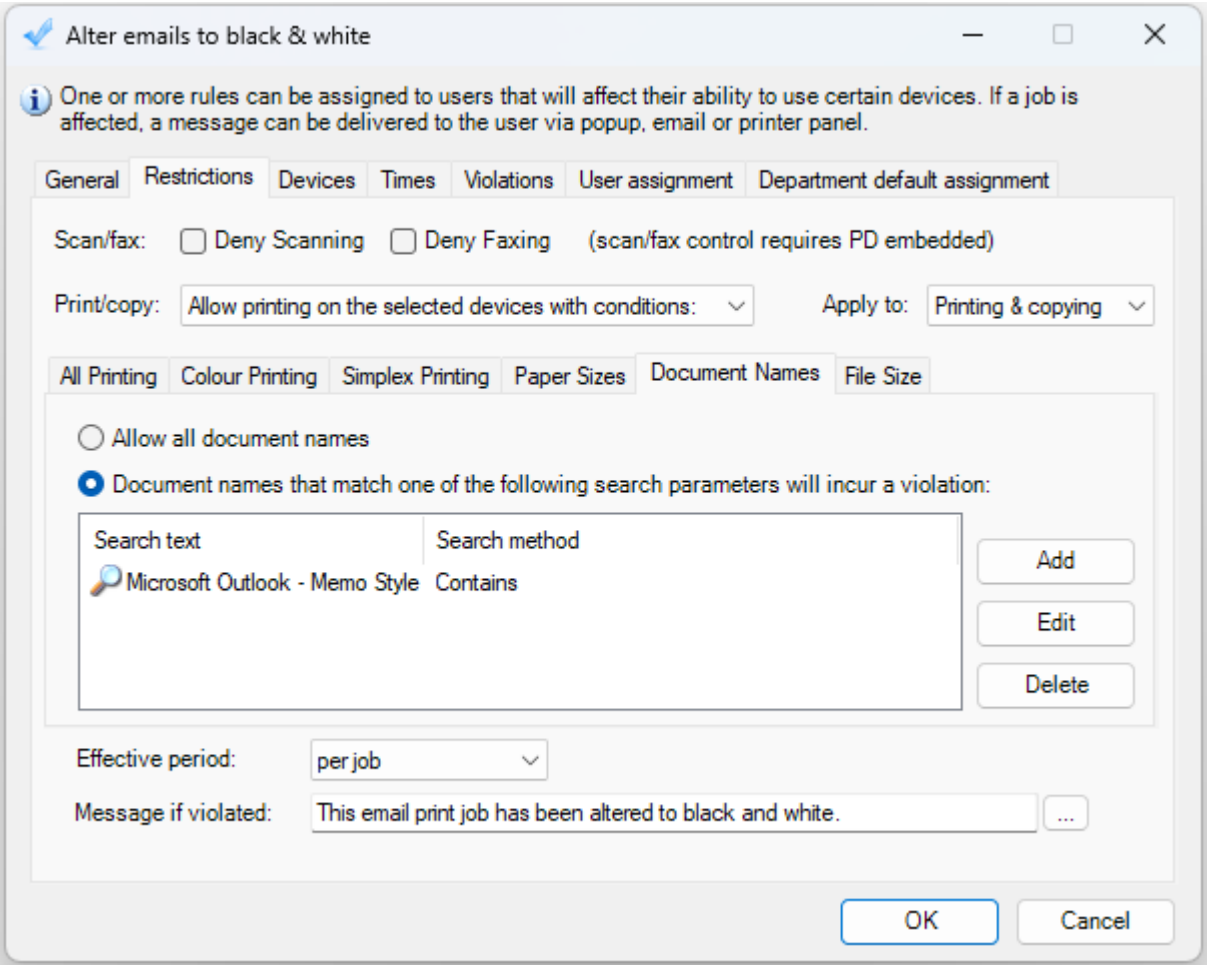


- Now click the **Document Names** tab.
- Change the option to **Document names that match one of the following search parameters will incur a violation**.

- Click the **Add** button.
- Enter Microsoft Outlook - Memo Style in the **Search text** field.
- Click **OK**.



- Add any other document name matching items if other applications are used for printing emails.
- The **Effective period** dropdown will only affect the frequency of notifications (unlike quota rules which effect the period during which the quota calculation is performed). If you have selected a notification to be sent per period, then specify the period here. Otherwise, this dropdown has no effect.
- In the **Message if violated** textbox, enter the text that you wish to be displayed to the user. Click the ... button to use the expanded form to enter text and insert replacement tags.



- Click the **Devices** tab.
- If the Rule must affect all devices, choose the **All devices** option. Otherwise, choose **Only the devices selected below** option and tick the devices you wish to be affected by the Rule.

- Click the **Times** tab.
- If the Rule should only be applied on specific days of the week, tick the days in the list on the left.
- If the Rule should only be applied during certain times of the day, change the option to **Only the times selected below** and specify the times. Otherwise leave the **All times** option selected.
- Click **OK**.

Apply the Rule to a user or users

Now that the Rule has been created, we need to apply it to one or more users. To apply the rule to a whole Department, skip to the next section.

- Open Resource Manager.
- Navigate **User Management** > **Users.**
- On the right, select the user (or multi-select users) and click **Edit**.
- Click the **Rules** tab.
- Select the Rule(s) to apply to the user. If more than one user was selected, tick the box to the left of the list of rules to enable it.
- Click **OK**.

Apply the Rule to a Department or Departments

Note that applying a Rule to a Department will not affect current members of the Department. It is a New User Default. This means that newly created users that are added to this Department will inherit the Rule. You can apply the Rule to current members by clicking the Go button (see below).

- Open Resource Manager.
- Navigate **User Management** > **Departments.**
- On the right, select the department (or multi-select) and click **Edit**.
- Click the **Rules** tab.
- Select the Rule(s) that will be the New User Default for the Department. If more than one Department was selected, tick the box to the left of the list of rules to enable it.
    - In order to apply this Rule to the current members of the Department, click the **Go** button in the **Current Members** frame.
- Click **OK**.

Refresh PDServers and PDAgents

Now that a Rule setting has been changed, the PDServers and PDAgents will apply the setting when they next refresh from the database. By default, this happens every 10 minutes. To force a refresh immediately, follow these steps:

- On the left, click the **PD Servers** node.
- On the right, highlight all the servers. Right click and choose **Refresh**.
- Now click the **PDAgents** node.
- On the right, highlight all the servers. Right click and choose **Refresh**.

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