

# How to create a monthly colour threshold for a printer and refer users to a different printer

## Create a Rule

1. Open Resource Manager.
2. In the tree view, click **Rules**.
3. On the right hand side, click the **Add** button.
4. For the purposes of this example, we will be using a maximum of 2000 colour pages. In the **Rule name** text box, under the **General** tab, enter **Max 2000 colour pages per month**.
5. Change the **Apply this rule to** drop down to **All users with exclusions**.
6. Change the **Calculate quota conditions using** drop down to **transactions of all affected devices (aggregate)**.
7. Change the **Action on rule violation** to **Hold job**.
8. In the Notification on violation frame:
  - a. Tick the **Show on printer panel (Secure Release/Follow Me only)** checkbox.
  - b. If you want to get an email when the threshold is met, tick the **Send email to the following recipient(s)** checkbox and enter your email address.
  - c. In the drop down below your email address, change the option to **Once per period** (so you only get one email).
  - d. Choose the email account that will be used to send emails.

**Max 2000 colour pages per month**

One or more rules can be applied to users that will affect their ability to print to certain devices. If a job is affected, a message can be delivered to the user via popup, email or printer panel.

**General** | Restrictions | Devices | Times | Violations | Excluded Users | Excluded Departments

Rule name: Max 2000 colour pages per month ☒ Record violations

Status: Active

Apply this rule to: All users with exclusions

Calculate quota conditions using: transactions of all affected devices (aggregate)

Action on rule violation: Hold job

**Notification on violation**

☒ Show on printer panel (Secure Release/Follow Me only)

☐ Popup on user's workstation (printing only) ☐ Require confirmation

☐ Send an email to the violating user On every violation

☒ Send email to the following recipient(s): your@email.com

Once per period

Email account: axcess

OK Cancel

9. Click the **Restrictions** tab.
10. Select the **Allow printing on the selected devices with conditions** from the Print/copy option.
11. Click the **Colour Printing** tab.
12. Select the **Max colour pages** option.
13. Enter **2000** in the box.
14. Change the **Effective period** drop down to **per calendar month**.
15. Change the Message if violated to **This printer has reached its maximum colour threshold for the month. Please release your job at the upstairs printer** (put in whatever message you want the user to see).

Max 2000 colour pages per month

One or more rules can be applied to users that will affect their ability to print to certain devices. If a job is affected, a message can be delivered to the user via popup, email or printer panel.

General Restrictions Devices Times Violations Excluded Users Excluded Departments

Scan/fax: ☐ Deny Scanning ☐ Deny Faxing (scan/fax control requires PD embedded)

Print/copy: Allow printing on the selected devices with conditions: Apply to: Printing & copying

All Printing Colour Printing Simplex Printing Paper Sizes Document Names File Size

☐ No restriction on colour and black & white printing  
☐ Colour printing will incur a violation  
☐ Black & white printing will incur a violation  
☒ Max colour pages: 2000  
☐ Max b&w pages: 2000

Effective period: per calendar month Since day 1 of the month

Message if violated: This printer has reached its maximum colour threshold for the month. Please release your job at the upstairs printer

OK Cancel

16. Click the **Devices** tab.
17. Change the option to **Only the devices selected below**.
18. Tick only the printer for which this maximum colour threshold will apply in the list below.
19. 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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