

How to create a monthly total 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 15000 pages. In the **Rule name** text box, under the **General** tab, enter **Max 15000 total 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 (only applies to 'follow me' printing)**.
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.

The screenshot shows a dialog box titled "Max 15000 total pages per month". It has a warning icon and a message: "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." Below this is a tabbed interface with tabs for "General", "Restrictions", "Devices", "Times", "Violations", "Excluded Users", and "Excluded Departments". The "General" tab is active and contains the following fields:

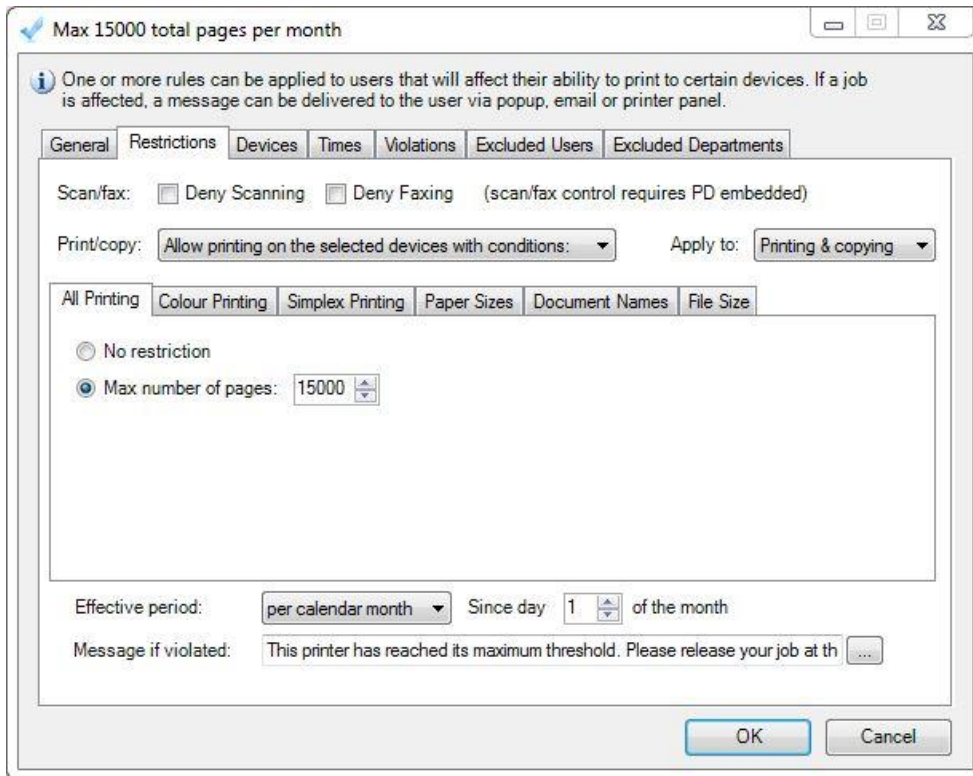
- Rule name: Max 15000 total pages per month (with a checked "Record violations" checkbox)
- Status: Active (dropdown)
- Apply this rule to: All users with exclusions (dropdown)
- Calculate quota conditions using: transactions of all affected devices (aggregate) (dropdown)
- Action on rule violation: Hold job (dropdown)

The "Notification on violation" section is expanded and contains:

- 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 (dropdown: On every violation)
- Send email to the following recipient(s): your@email.com (dropdown: Once per period)
- Email account: axcess (dropdown)

At the bottom are "OK" and "Cancel" buttons.

9. Click the **Restrictions** tab.
10. Select the **Allow printing on the selected devices with conditions** from the Print/copy option.
11. On the **All Printing** tab, select the **Max number of pages** option.
12. Enter **15000** in the box.
13. Change the **Effective period** drop down to **per calendar month**.
14. Change the **Message if violated** to **This printer has reached its maximum threshold. Please release your job at the upstairs printer** (put in whatever message you want the user to see).



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

Refresh PD Servers and PD Agents

Now that a Rule setting has been changed, the PD Servers and PD Agents 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 **PD Agents** node.
- On the right, highlight all the servers. Right click and choose **Refresh**.

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