How to prevent a user from printing in colour

A **Rule** controls what users may print, copy, scan or fax, and what happens when a job breaks it. This article creates a Rule that stops chosen users printing in colour, and explains the settings that every Rule shares. The other Rule articles link here for these.

Create the Rule

1. Open Resource Manager.
2. In the tree, click **Rules**, then click **Add**.
3. On the **General** tab:
   - In **Rule name**, enter a descriptive name, for example *No colour*.
   - Set **Initial user assignment** to **Unassigned by default**, so the Rule only affects the users you assign it to. (**Assigned by default** applies it to every user straight away.)
   - Choose the **Action on rule violation** (see below), for example **Deny job**.
   - Under **Notification on violation**, choose how the user is told (see below).
4. On the **Restrictions** tab:
   - Set **Print/copy** to **Allow printing on the selected devices with conditions**. **Apply to** sets whether the Rule covers **Printing & copying**, **Printing only** or **Copying only**; copying needs a printer with the Print Director app (PD embedded).
   - Click the **Colour Printing** tab and choose **Colour printing will incur a violation**.
   - In **Message if violated**, enter the message the user sees, for example *You may not print in colour. Please print in black & white.* Click **...** to open a larger box where you can also insert replacement tags.
   - **Effective period** only matters if you chose a notification that is sent once per period. It then sets the period.
5. On the **Devices** tab, choose **All devices**, or **Only the devices selected below** and tick the printers the Rule applies to.
6. On the **Times** tab, leave **All times**, or tick the days and choose **Only the times selected below** to apply the Rule at certain times only.
7. Click **OK**.

Action on rule violation

- **Deny job:** the job is deleted.
- **Continue job:** the user is told, but the job prints in colour.
- **Hold job:** the job is not printed at the printers this Rule applies to, but the user can release it at any printer the Rule does not apply to.
- **Alter job:** the job is changed to black & white. This works with PCL, PostScript and PDF printer drivers, on printers that support PJL.
- **Auto-release to matched device:** the job is sent to the printer matched to the print queue.
- **Auto-release to other device:** the job is sent to the printer chosen in **Release to other device**.

Record violations (ticked to start with) records each time the Rule is triggered. You can see these on the Rule's **Violations** tab.

Notification on violation

- **Show on printer panel (Secure Release/Follow Me only):** the user sees the message on the printer panel when they try to release the job.
- **Popup on user's workstation (printing only):** ticked to start with. The user sees a popup on their computer when they print. This needs the PDAgent client on their computer. With **Require confirmation** ticked, the user must click **OK** before the job prints.
- **Send an email to the violating user:** the user is emailed (their email address must be on their user record). Choose how often: **On every violation**, **Once per period** or **Once per period per device**.
- **Send email to the following recipient(s)** the addresses you enter are emailed, for example a manager. Choose how often: **On every violation**, **Once per period**, **Once per period per device** or **Once per period per user**.

For emails, choose the **Email account** to send from. See *How to create an Email Send Account* if you have not set one up.

Assign the Rule

A Rule that is **Unassigned by default** only affects the users you assign it to. You can assign it in three places:

- **On the Rule:** double-click the Rule, click the **User assignment** tab, select the users, and click **Edit assignment**. The **Department default assignment** tab sets the default for departments in the same way.
- **On a user:** in **User Management** > **Users**, double-click the user (or select several and edit them together), click the **Rules** tab, select the Rule, and click **Edit assignment**.
- **On a department:** in **User Management** > **Departments**, double-click the department, click the **Member default settings** tab and then the **Rules** tab, select the Rule, and click **Edit assignment**. This sets the default for users added to the department later. To apply it to the department's current members as well, click **Go** at the bottom of the tab.

In the **Change rule assignment** window, set **Set assignment** to **Assigned** and click **OK**. The other choices are **Unassigned**, and **Assigned to date** or **Unassigned to date** for a change that reverts by itself on the **End date** (see *How to temporarily unassign or assign a Rule for a specific user*).

When the Rule takes effect

PDServers and PDAgents pick up a new or changed Rule at their next settings refresh, within 10 minutes. To apply it straight away:

1. In the tree, click **PD Servers**.
2. Right-click a PDServer and click **Select All**.
3. Right-click again, point to **Send command**, and click **Refresh all connected PDAgents**. This refreshes the PDServers and the PDAgents connected to them.

Related articles

- *How to force all printed emails to black & white*
- *How to create a monthly colour printing quota for a user*
- *How to temporarily unassign or assign a Rule for a specific user*
- *How to assign Rules to users based on LDAP group membership*

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