



# Create Rules and Routes

Instructor Led Training  
Chapter 3 – Exercise I

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## Rule and Rule Sets

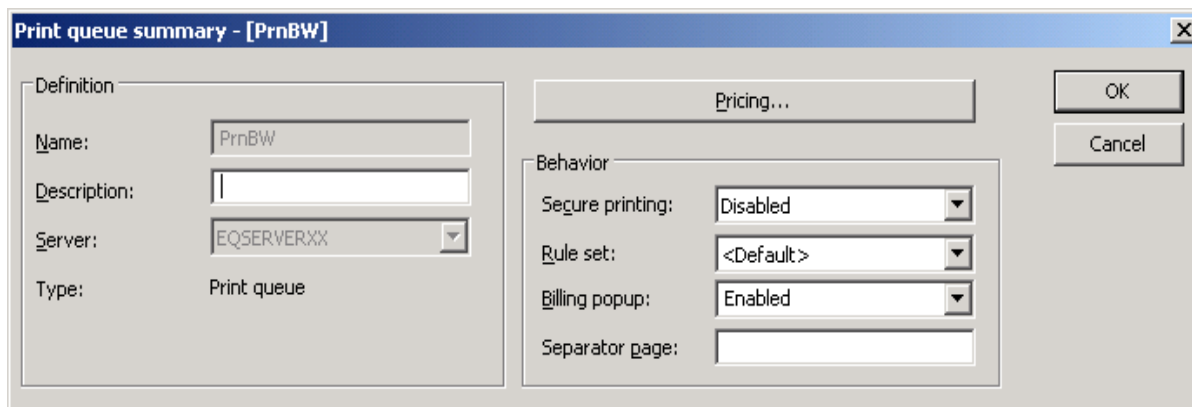
Rules define the conditions under which a print job that is sent to a network or desktop printer is intercepted and handled, or under which conditions a copy request should be allowed or denied. For example, if you send a print job to a printer that is offline, you might want the print job to be automatically redirected to another printer. For color copiers, you might want to limit which users can print to the device. All rules must be part of a Rule Set. You can apply the Rule Set to one or more devices, queues, ports, or control terminals; however, only one rule can be assigned to each device. For training purpose, refer to the following chart to define each Rule Set.

Rule Set	Action	Redirect to	Reason	Assign to Print Queue
Rule 1	Redirect and reprice	PrnFrsFL	Pages: Greater than 15	PrnBW PrnSecFL
	Deny	N/A	Time of day: 23:00 – 5:00	
	Redirect and reprice	PrnFrsFL	Device Status: Offline after 10	
	Deny	N/A	Title matches: *Resume*.*	
Rule 2	Deny	N/A	Time of day: 23:00 – 5:00	PrnFrsFL PrnColor
	Deny	N/A	Title matches: *Resume*.*	
	Redirect and reprice	PrnSecFL	Device Status: Offline after 10	

## Enable Secure Printing


**NOTE:** Secure printing is enabled on the print queue.

1. Start **Equitrac System Manager** and connect to your accounting server.
2. In the left pane, click  **Devices**.
3. Expand the devices until the PrnBW print queue appears.
4. Click **PrnBW**; the Print queue summary dialog box appears.






The image shows a screenshot of the 'Print queue summary - [PrnBW]' dialog box. The dialog has a title bar with a close button. It is divided into several sections:


- Definition:**
  - Name: PrnBW
  - Description: (empty text box)
  - Server: EQSERVERXX (dropdown menu)
  - Type: Print queue
- Pricing...** (button)
- Behavior:**
  - Secure printing: Disabled (dropdown menu)
  - Rule set: <Default> (dropdown menu)
  - Billing popup: Enabled (dropdown menu)
  - Separator page: (empty text box)
- Buttons:** OK and Cancel

5. Click the **Secure printing** drop-down arrow and then select **Enabled**.
6. Click the  button.
7. Repeat these steps on each of the remaining print queues listed.






### Create a Rule Set

1. Start **Equitrac System Manager** and connect to your accounting server.
2. In the left pane, click .
3. In the right pane, click **<Add...>**; a Rule set dialog box appears.
4. In the **Name** field, type **Rule 1**.
5. Click **<Add...>**.
6. Click the **Action** drop-down arrow and select **Redirect & reprice**.
7. Click the **Print queue** drop-down arrow and select **PrnFrsFL**.
8. Click to select the **Pages** check box, click the drop-down arrow, select **Greater than** and then type **25** in the next field.
9. Click the  button.
10. In the Custom message dialog box, type the following message:  
**Your print job has been redirected to the printer PrnFrsFL. The number of pages is too high for this printer. In the future, any job containing more than 15 pages should be sent the printer PrnFrsFL. This job will be repriced for this printer.**
11. Click the  button; the first rule appears in the dialog box.

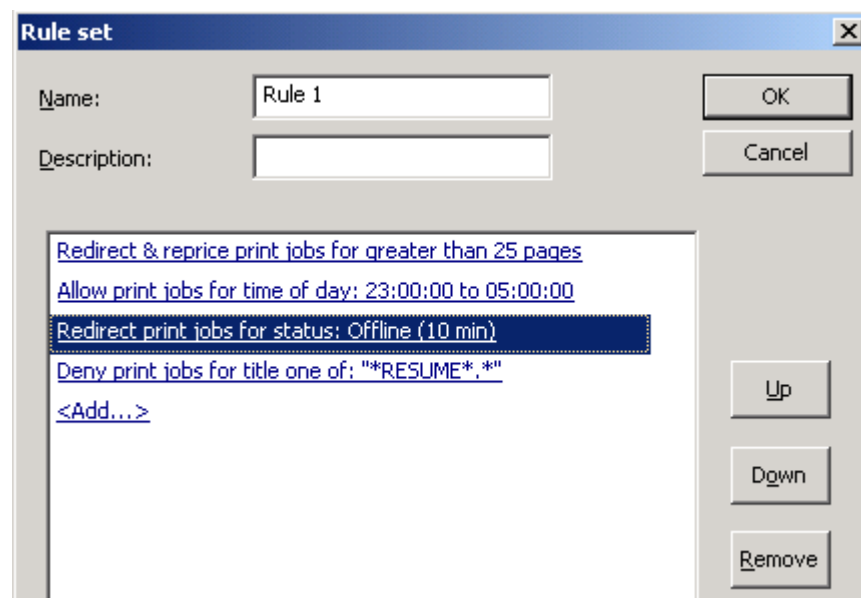
**NOTE:** If you define multiple conditions on a rule, they are treated as “AND” conditions and BOTH conditions would have to be met for the rule to be applied. For example, in the above example, if you selected **Pages AND Duplexing**, and you sent a 30 page document to print that did not have duplexing enabled, the print job would not be redirected.


12. Click **<Add...>**.
13. Click the **Action** drop-down arrow and select **Deny**.
14. Click the **Time of day** check box and type **23:00** in the first field and **5:00** in the second field.
15. Click the  button.
16. In the Custom message dialog box, type the following message:

**Printing is unavailable between the hours of 11:00 pm and 5:00 am. Your print job has been denied and deleted. Please submit your print job again during available hours.**

17. Click the  button; the second rule appears in the dialog box.
18. Click **<Add...>**.
19. Click the **Action** drop-down arrow and select **Redirect & reprice**.
20. Click the **Print queue** drop-down arrow and then select **PrnFrsFL**.
21. Click to select the **Device status** check box, click the drop-down arrow, select **Offline**, and then type **10** in the last field.
22. Click the  button.
23. In the Custom message dialog box, type the following message:  
**The selected printer is currently offline. Your print job has been redirected to printer PrnFrsFL and will be repriced for this printer.**
24. Click the  button; the third rule appears in the dialog box.
25. Click **<Add...>**.
26. Click the **Action** drop-down arrow and select **Deny**.
27. Click to select the **Title matches** check box and then type **\*RESUME\*.\*** in the field.
28. Click the  button.
29. In the Custom message dialog box, type the following message:  
**Your resume has been printed to the printer in the office of the VP of Human Resources. Please pack your things and pick up your document on your way out.**
30. Click the  button; the final rule appears in the Rule Set dialog box.

When all rules have been created, the Rule set dialog box should appear as follows:



31. Click the  button to save the Rule Set.
32. Refer to the chart at the beginning of this document to create Rule 2.

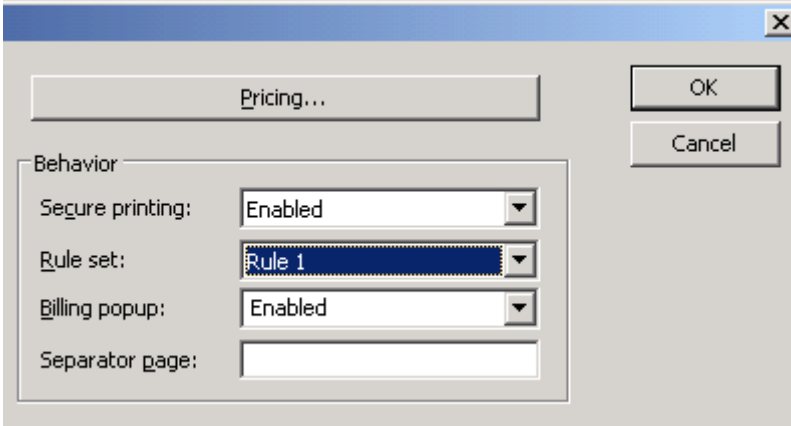
## Assign a Rule Set to a Printer

**NOTE:** Refer to the chart at the beginning of this document to determine which printers to assign each Rule Set to.

1. In **Equitrac System Manager**, click  in the left pane; a list of devices appears in the right pane.
2. Expand each device until the print queues **PrnBW**, **PrnColor**, and **PrnFrsFL** appear.

Name	Server	Description	ID	Type
[-] SecondFloor			SecondFloor	Physical device
[-] EQ_SecondFloor:Temp	EQSERVERXX		Temp	Port
PrnSecFL	EQSERVERXX			Print queue
Auto-generated devic...	EQSERVERXX		0004b5002057	Control terminal
[-] FirstFloor			FirstFloor	Physical device
[-] EQ_FirstFloor:Temp	EQSERVERXX		Temp	Port
PrnFrsFL	EQSERVERXX			Print queue
[-] ColorPrinter			ColorPrinter	Physical device
[-] EQ_ColorPrinter:Temp	EQSERVERXX		Temp	Port
PrnColor	EQSERVERXX			Print queue
[-] BWPrinter			BWPrinter	Physical device
[-] EQ_BWPrinter:Temp	EQSERVERXX		Temp	Port
PrnBW	EQSERVERXX			Print queue

3. Click **PrnBW**; a Print queue Summary dialog box appears.
4. Click the **Rule set** drop-down arrow and select **Rule 1**.



5. Click the  button.

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6. Referring to the chart at the beginning of this document, repeat these steps to assign a rule set to the PrnColor and PrnFrsFL print queues.
  7. Exit Equitrac System Manger when finished.