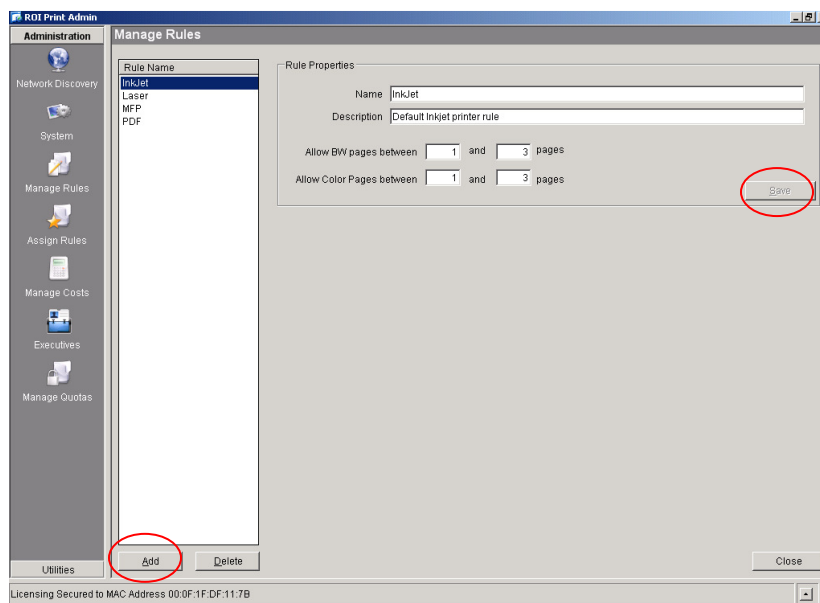




## How to set up some basic ROI Print Management Rules and Quotas

### Setting up Rules

Each individual network will design rules that meet the needs of their environment. However, as a starting point, the following rules could be put in place:



**1. Desktop Inkjet Rule** - Create a rule that allows between 1 and 3 pages in black and white and color. This will allow desktop users to print up to 3 pages to their desktop printer. This enables the end user to still utilize their desktop for smaller jobs for ease of use.

**2. Mid-Range Black and White Rule** - Allows 1 to 50 pages in black and white. This rule would be applied to mid level black and white printers such as HP Laser jets. This becomes an alternative rule for larger jobs that would have been sent to the desktop inkjet device.

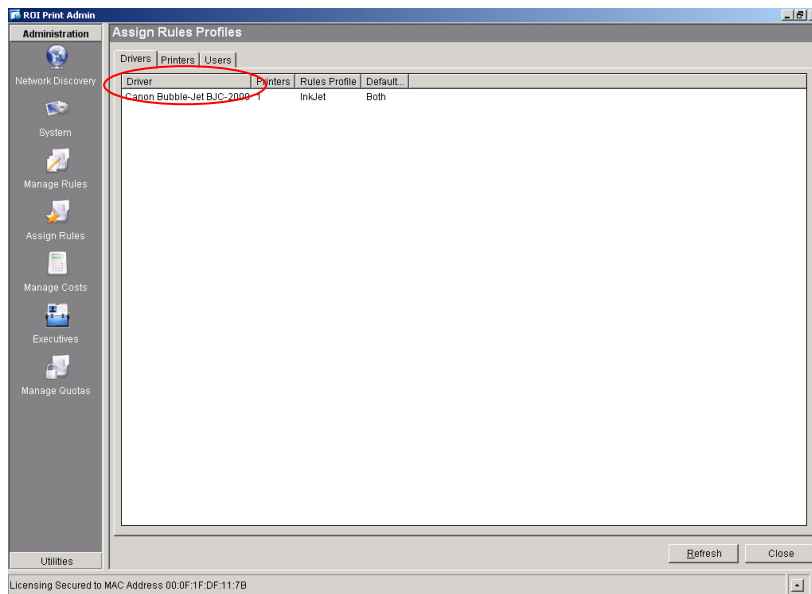
**3. Multifunction Rule** - Allows 1 to 200 pages in black and white and 1 to 50 pages in color. This rule allows printing larger black and white and color jobs to this more cost effective device.

This is another alternative rule for the color desktop inkjet and it also becomes an alternative to the mid-range black and white device.

**4. High-Production Rule** - 200 to 10000 pages in black and white. This screens smaller jobs away from high production devices. Small jobs sent to a high production device can reduce that devices efficiency.

These are some basic rules that can be easily set up to start saving money immediately. More rules can be added to refine the overall print strategy.

Once you have established your basic rule set, the next step is to assign the rules to the applicable printers. Go to the Assign Rules icon. On this screen, all the drivers from workstations that have an ROI Agent on them are displayed. **You can install the rules at the driver level, at the printer level, or at the user level.** Rules assigned at the user level override any rules assigned at the printers level, which override any rules assigned at the driver level.



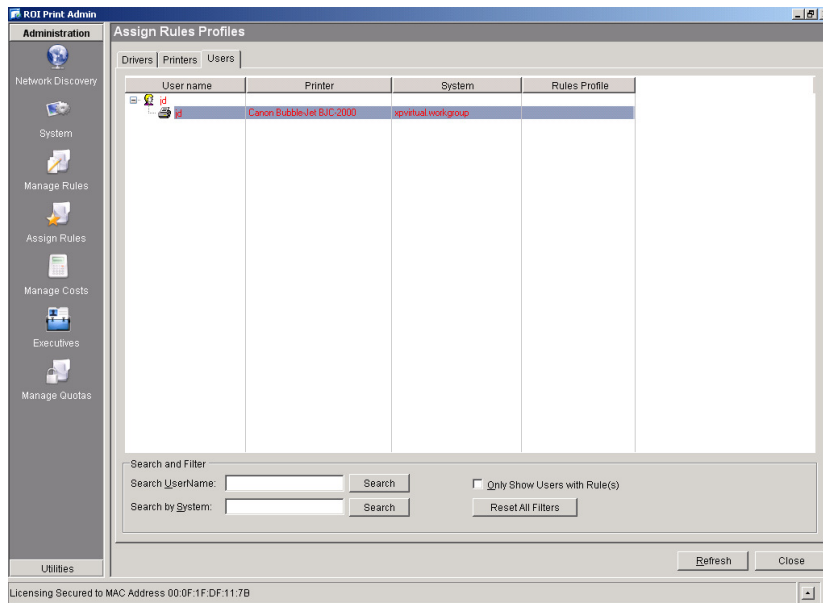
It is easiest to assign rules at the Driver level so they will take effect on all drivers of that type in the network.

Remember that once a rule is assigned at the driver level, anyone using that driver that has an ROI agent installed will begin to be presented the Pop up if they break the assigned rule.

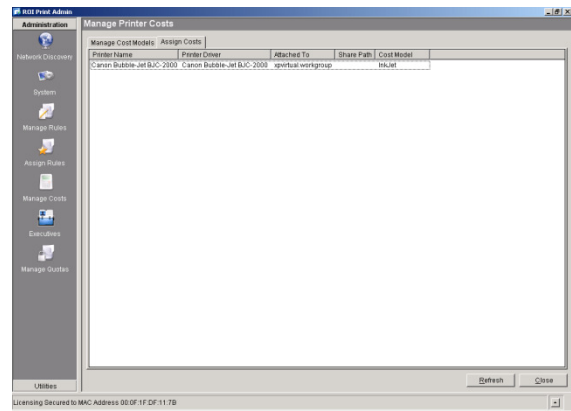
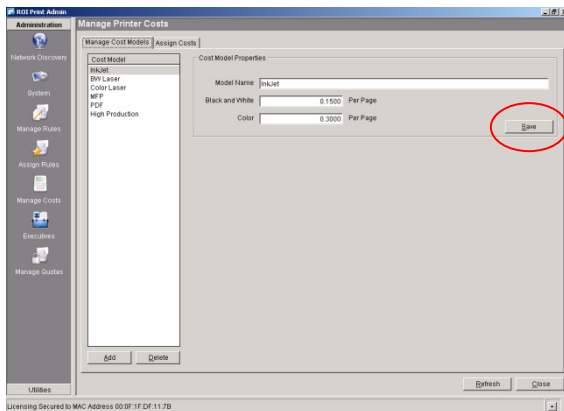
Remember too, that you should also create an alternative (less restrictive) rule so that the end user is presented with an alternative printer to re-redirect to.

You assign the rules by **right clicking** on the driver and assigning the applicable rule. When you do this the rule will turn black. You can also default a printer to BW or Color if the driver is reporting incorrectly.

Ideally, rules should be assigned to all drivers, so that all drivers appear in black. Then when new drivers appear on the network, they are easily identified in red. You can also assign rules at the **user level**. Right click on the user and input the applicable rule.



The next step is to input costs. Go to the Manage costs icon. Here you input costs for the particular devices on the network. You then use the Assign Costs tab to assign the created cost to the appropriate device. This will ensure that the ROI Pop Up will display a % of cost savings to the end user.



## Managing Quotas

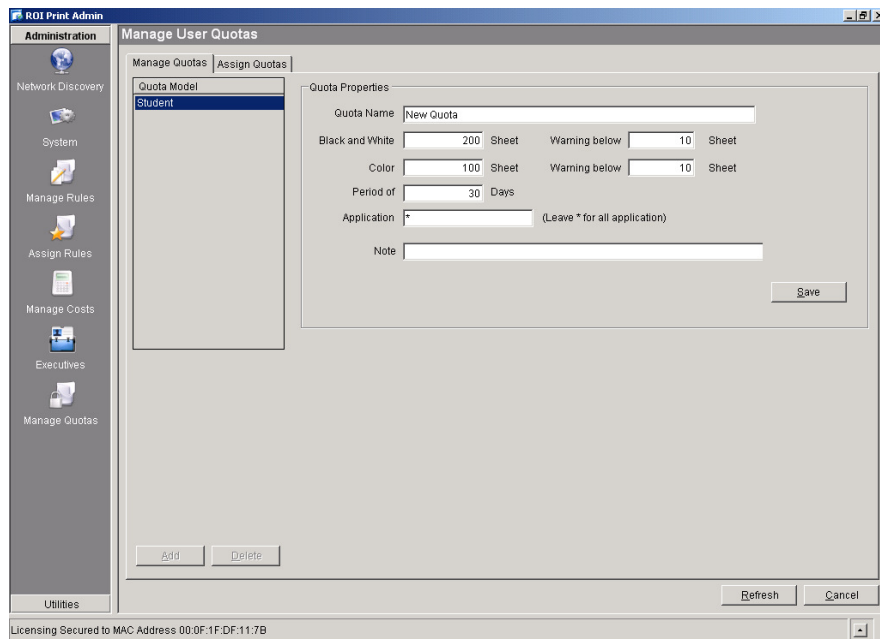
Quotas can be implemented to restrict end users to a certain number of pages for a preset time period.

Here you can set the number of pages limited to color and/or black and white along with a set amount of time (by default this is set to 30 days). You can also set the application that you want to restrict printing from such as word, excel etc. Alternatively you can put enter an \* to act as a wild card which will automatically apply the quota to all applications that user will print from.



*Example of customizable quota pop-up.*

You also have the ability to set a warning pop-up to the user when they are reaching the quota limit. As in the screen shot below you can set a warning below "X" amount of pages for both color and black and white pages.



Once the quota has been created, it can be assigned to the particular user it is intended for by right clicking on the user name and selecting "Assign Quota" from the sub menu.

If at any time you wish to remove the quota from the user you can right click the user and select "un-assign quota" from the sub menu.

