

Getting Started with Barr EOM

Solutions for Enterprise Output Management



Documentation Edition 5

Software Version 3.0.537.8 or later

Copyright © 2008-2011 by Barr Systems, LLC
All Rights Reserved.



Barr Systems, LLC
4500 NW 27 Avenue
Gainesville, FL 32606-7031

Phone: 800-BARR-SYS
800-227-7797
352-491-3100

Fax: 352-491-3141

Email: support@barrsystems.com
Web site: www.barrsystems.com
FTP site: [ftp.barrsystems.com](ftp://ftp.barrsystems.com)

The Barr logo and Barr EOM are registered trademarks of Barr Systems, LLC.

Microsoft, Windows, Windows XP, Windows 2003 Server, Windows Vista, and Windows 2008 Server are registered trademarks, and SNA Server is a trademark of Microsoft Corporation.

AFP and IPDS are trademarks of IBM in the United States.

Pentium is a registered trademark of Intel Corporation.

All other trademarks are the sole property of their respective owners.

May 24, 2011

Technical Writing

Becky Senn

Development

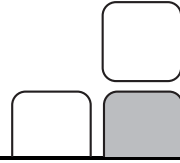
Alan McKinney
Bruce Richardson
D’Arcy Truluck
Dave Frazzitta
Dennis Mahoney
Gabriel Schwartzman
Jeff Reichard
Jerry Zhu
Josh Wirth
Ken Clark
Mario Montes
Ron Van Aken
Steve Blay
Steve Scovill
Troy Bleeker
Wayne Wolf
Zain Basrawala

Support and Testing

Beth Allen
Carl Fisher
Chris Hulvey
Christopher McCue
Kenny Brown
Marcela Ciupe
Mark DeLaFleur
Mark Gross
Robert Crews
Ron Van Aken

Notes:

Preface



Barr EOM comes with both a printed manual and extensive online documentation.

This manual

Follow the instructions in this manual to install, configure, and use the Barr EOM software. Refer to the Help for additional detailed instructions. Chapter 5 explains how to start and use the Help.

HTML Help

The Help gives you comprehensive step-by-step configuration and operation instructions for Barr EOM. You can view up-to-date Help files for the current software release by visiting the support page of the Barr Systems Web site (www.barrcentral.com).

Barr Technical Support

You can contact Barr Systems by email, fax, or phone to work directly with a Support Analyst. Our Frontline and Research support is available five days a week, Monday – Friday. Refer to the Technical Support Web site (www.barrcentral.com) for specific information regarding the hours of operation.

Other methods of technical support include on-site visits, remote control service, and FTP server access. You have two easy-to-use support options available 24 hours a day, 7 days a week using the Internet.

- **Knowledge base** – The knowledge base system offers a complete database of solutions to known problems. Our knowledge base is designed to locate solutions based on the symptoms you are experiencing. We search the same knowledge when you call or email us! When we solve your problem, we add it to our knowledge base.
- **Case Manager** – If you've looked in our latest Help and knowledge base and you still didn't find your answer, you probably need our Technical Support. We've opened our case tracking system up to you on Barr Central through Case Manager. With Case Manager you can create a new case, add notes to the case, check its status, and attach diagnostics. Barr Systems is notified of these events so that our Support team knows what you need, and we keep in contact with you while the issue is being worked on.

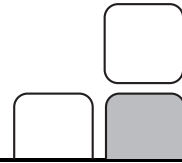
Be sure to include the software version number in correspondence with Technical Support.

Software version number

Once Barr EOM has been installed, from the taskbar, click Start | All Programs | Barr Systems | Barr EOM | **EOM Console**. From the EOM Console menu bar, select Help | **About EOM Console**. The software version number is displayed in this window.

The Barr Technical Support analyst may also request version numbers for additional program files. Use Windows Explorer to navigate to the folder where you installed the Barr software (usually \\Program Files\\Barr Systems\\EOM). Right-click **EOMConsole.exe** and select **Properties**. Select the **Version** tab and note the **File version** number.

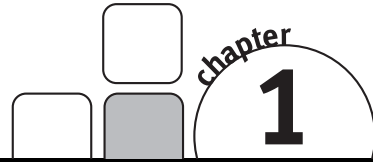
Contents



Preface	v
Contents	vii
1. Introduction	1
1.1 Features	3
1.2 Barr EOM components	6
1.3 System requirements	11
1.4 Package contents	12
2. Install the Software	13
2.1 Install on a single machine	13
2.2 Install on a server farm	25
2.3 Install on a failover cluster	38
2.4 Upgrade to a newer version of Barr EOM	38
2.5 Remove Barr EOM	44
3. Configure and Use the Software	47
3.1 Barr EOM concepts	47
3.2 Learn about EOM Console	52
3.3 Perform initial administrative setup	59
3.4 Customize grid views	65
3.5 Work with destinations	71
3.6 Work with sources	125
3.7 Work with documents	175
3.8 Work with reports	203
3.9 Work with devices	208
3.10 Work with alert rules	216
3.11 Work with business rules	221
3.12 Work with ad hoc rules	269
3.13 Use EOM functions	282
3.14 Schedule tasks	288
3.15 Use the Message Console	293

4. Configure Administrative Options.....	297
4.1 Learn about the Administration application	297
4.2 Configure columns	299
4.3 Configure global document properties	300
4.4 Manage billing accounts.....	300
4.5 Manage the Barr EOM license	301
4.6 Manage product components.....	305
4.7 Manage SNMP devices.....	305
4.8 Manage users	309
4.9 Convert/Restore Windows queues.....	328
4.10 Manage Windows queues	332
4.11 Set general preferences	336
4.12 Define Viewer utilities	340
4.13 Backup and restore Barr EOM	341
4.14 Manage resources	344
5. Use HTML Help.....	353
5.1 Launch the Help	353
5.2 Navigate within the Help	354
5.3 Get more out of HTML Help	357
5.4 Copy or print a Help topic.....	357
5.5 Customize your Help.....	358
Glossary.....	359
Index	363

Introduction



Barr Enterprise Output Manager (Barr EOM) provides a comprehensive solution for the management of your organization's document output. Barr EOM consolidates input from multiple operating systems and applications and centrally manages resources and documents, providing end-to-end tracking and reporting.

Although documents can travel directly from origin to destination, there are considerable benefits to routing them through a centralized system. Barr EOM is therefore built around these main concepts:

- Maximize the number of sources from which you can receive documents
- Provide greater control over documents than can be found in other products
- Manage and expand the number of document destinations
- Insure the security and integrity of documents throughout the send/receive cycle
- Produce a completely integrated audit trail and accounting functionality in order to monitor and control your costs
- Supply the tools necessary to convert document formats based upon the final destination
- Provide an observable process to a variety of audiences including administrators, print operators, end users, and management

Receiving documents

No matter where your documents originate, you will find that receiving them into Barr EOM occurs seamlessly, thanks to the product's many input options. If the source is a mainframe, you can choose from RJE, NJE, Enterprise Extender, Bus & Tag, ESCON, or IP. From IP sources, Barr EOM can receive documents using LPD, Socket, or FTP connections. Other input options include network folders, email, Web uploads, and Windows applications. Regardless of your source, Barr EOM receives all available document properties, which can then be used to determine the respective document's path through the system.

Managing documents

Once documents arrive into Barr EOM, all of their properties are logged into the product's database. What happens next depends on the business rules configured by administrators. If no routing rules are configured, then the documents are collected for manual routing, which can be done through our intuitive user interface. Most of our customers, however, prefer to take advantage of the advanced dynamic routing functionality of Barr EOM. Using a plain English interface, product administrators can use all of the document's properties (and even the document's contents) to dictate where it should be sent. These rules also control whether a document needs to undergo any transformations before it is routed to the final destination.

Transforming documents

Often, the document origin is not compatible with the document destination. Most common scenarios include AFP or Metacode files that need to be printed on PCL printers, print documents that need to be posted as PDF files on the Web, large reports that need to be burst into smaller pieces before being sent to various recipients, and so on. Barr EOM includes comprehensive support for converting and repurposing documents.

Managing destinations

Once Barr EOM performs any necessary transformations, documents are ready to be routed to the final destination. Barr EOM supports a variety of destinations including network folders, FTP, email and, of course, printers. In the case of printers, you can add them either manually or through the auto-discovery capabilities. When Barr EOM recognizes a printer, it logs its capabilities (such as color, duplex, and PCL) and monitors it continuously. This monitoring extends beyond the basic, checking operational details such as the level of toner and the amount of paper in the trays. Proactive monitoring prevents documents from being sent to unavailable printers and instantly alerts help desk staff of problems even before a document is sent to the device.

User communication

Administrators can use the Barr EOM Console to centrally monitor all sources, documents, transformation processes, and destinations. The intuitive user interface provides a complete, real-time picture of everything that is happening in a company's output processes.

In addition to real-time monitoring, Barr EOM supports a wide array of notification options. Administrators can choose to be notified should any errors occur while documents are being received, converted, or routed. Additionally, they can choose to be notified if problems arise with monitored printers. End users can also be alerted about the status of the documents they submit or are responsible for. Finally, Barr EOM gives management access to reports that encompass all activity, including cost allocation to projects or departments.

1.1 Features

Barr EOM includes the following features and benefits.

Inbound connectivity

Barr EOM input counts mainframes, network folders, email, Web uploads, and all Windows applications among its source options. Barr EOM provides one point of control for your entire document workflow. With such control, you can use powerful features related to routing, scheduling, security, business rules, and automation; Barr EOM then uses these features for all of your document distribution processes. No matter where your documents originate, receiving them into Barr EOM occurs seamlessly. Regardless of source, Barr EOM receives all available document properties (page count, document or file name and type, file size, user name and other statistics and attributes), and uses them to determine that document's path through the system.

Document and data handling

As documents arrive into Barr EOM, all of their properties are logged. Depending on the business rules that you configure you can decide, through our intuitive user interface, to which output device or destination a file should be sent. The print spool interface gives you complete control over the printing and routing of documents. You can then direct files from any of the many input sources to a variety of destinations, to predefined destinations for your output based on the same business rules, or both a variety of and predefined destinations.

Barr EOM assures the security of your documents while giving you the freedom to hold, redirect, duplicate, split, merge, enhance, or edit them as necessary. The way documents are handled can be predefined so that each time that Barr EOM is notified that a particular document is coming into the system, it will automatically perform the tasks you define.

The entire process is easily set up with the graphical rules builder. The interface used to create rules is second to none in terms of ease of use, flexibility, available options, logic flow, and functionality.

Document bursting, merging, enhancing, and reformatting

Often, the format in which the document originated is not compatible with the format required by the destination device. Changes to the document might be necessary, yet the application where it originated cannot be easily modified. Barr EOM includes comprehensive support for converting and repurposing such documents. For example, Barr EOM can:

- Separate, split, merge, or filter individual documents or batches of documents.
- Classify and index information inside documents.
- Rotate misaligned pages and change page sizes.

- Burst large documents based on fields inside the documents (for example, zip codes).
- Merge several documents into one.
- Filter documents or individual pages according to predefined criteria.
- Add or delete text, barcodes, overlays, and images.
- Change page sizes and reposition page content.
- Provide conversions for AFP, IPDS, Xerox Metacode and LCDS, PCL, Postscript, PDF, TIFF, and more.

Destination management

Once document handling activities are complete, documents are ready to be routed to any number of destination types. For each defined printer, Barr EOM logs all possible capabilities — everything from color to toner to paper levels. Even the number of documents waiting to be printed can be selected as a routing criterion to send a document to a printer that is not as busy.

User interfaces

Multiple user interfaces were built to fit your needs. The ability to access Barr EOM from your desktop, the Web, or even the control panel on your enabled printers makes it the most versatile system you'll ever find. There are no add-on products to buy, no new configurations to implement and manage, and no programming changes to your existing applications. Just install it and you're ready to use the built-in features.

Barr EOM is server-based and accessible from numerous clients. It includes .Net, Web, and embedded user interfaces that can monitor all sources, documents, document management activities, and destinations. Users can safely customize their own views while administrators can insure that user security is enforced regardless of the user interface selected.

Device management

Barr EOM offers an unparalleled view of your print infrastructure including desktop, network, and production print devices. It all starts with the automatic discovery process, which finds and creates a complete profile of all of the printers on your network. With the tree view and the advanced grouping, filtering, and searching capabilities, you can find any device in just seconds, even if there are thousands of them.

Using the drag-and-drop feature, you can instantly move any of the documents to another device, while the security model gives you complete control over what can be printed on each printer and by whom.

Failover printing

Barr EOM features several types of failover printing with devices or groups of printers that back each other up. By checking the status of the primary output device, Barr EOM can automatically reroute output to an alternate device and, if desired, notify the user of the change in destination.

Load balancing

You can use Barr EOM to configure groups of printers that support load balancing by determining the best device to print to in each printer group. Barr EOM then notifies the user where the report will print out. The result is a more even workload among devices. It can also help eliminate underutilized printers on your network.

ReleaseAnywhere

Rather than sending a document directly to a destination device, Barr EOM can secure the document and allow it to be picked up at any printer. Barr EOM can receive a document, notify the user that it has arrived, and wait for the user to log in at any printer to retrieve it.

Print security

Administrators can set rules for security at many different levels using the Barr EOM integrated security layer. Access can be limited for any device or user interface depending on the rules defined. Rules for workflow management can also be tailored so that users can manipulate only queues and jobs for which they are authorized.

Based upon the login credentials for each user, restrictions and permissions can be granted and revoked for configuration changes to objects, data conversions, viewing, and printing, monitoring jobs, deleting, and reprinting documents. Security can also be set-up to monitor certain user activities. Any action denied due to insufficient policies may be logged and reviewed by the administrator.

Accounting and auditing

Barr EOM provides an extensive audit trail of every activity. Every file that passes through Barr EOM, every device event, and every click by a user is logged and traceable. You can report on who printed what; when and where documents were printed (or reprinted); and even see what all of that printing cost you for billing or charge-back purposes. You can even use Barr EOM to find out how many times a printer jammed, or which process was started at a particular time.

Implementation of the Barr EOM audit and accounting functions does not require any alteration of your networks or the addition of a dedicated print server. Barr EOM can recognize whether a job contains color and apply the appropriate charge for such usage.

Barr EOM can tell you what your employees are printing, where they're sending their print jobs, and when they are using the premium features of your output devices. Barr EOM logs all of this information in its database so that you can then summarize this information by employee, device, and location for analysis purposes.

Proactive device support

With Barr EOM, your help desk can be alerted to output device issues before users even know they exist. Our proactive device-management platform monitors all output devices for errors and sends immediate notifications when they occur. In addition, your support staff can use Barr EOM to manage any output device, printers, and the documents waiting in their queues, all within the same user interface.

Reporting

One of the key features of Barr EOM is the ability to provide insight into your company's document output infrastructure through its various reports. There are two main ways in which Barr EOM provides reporting:

- You can build your own reports using the data available in the EOM database.
- If you prefer a complete reporting solution, Barr EOM has a reporting module, which provides reports via the web and the Barr EOM Reports application. The Reports application includes a **Report Designer** that can be used by EOM administrators to edit the out-of-the-box reports or create new ones from templates.

1.2 Barr EOM components

Barr EOM is a complex software system, consisting of many components. Some of these components are required for base operations, while others are only required if the respective functionality is desired.

Barr EOM database

The Barr EOM database is a central component of the Barr EOM software package. It can be installed on any edition of Microsoft SQL Server 2005, Microsoft SQL Server Express 2005, or later versions. The database performs the following functions:

- Stores all configuration data for Barr EOM.
- Includes information about and provides pointers to all active, retained, and archived documents in the system.
- Logs all activity in Barr EOM.
- Supports the Barr EOM Services in the regular operation of the system.

Only one Barr EOM database can be used per Barr EOM installation. Depending on the scale of the system, we recommend hosting the database on a powerful hardware platform. Technologies such as clustering, replication, and mirroring can be used to ensure continuous operation of the database. Please see Microsoft's documentation for SQL Server for details about building a fault tolerant setup.

Barr EOM services

Barr EOM is a Windows-based software system built on the Microsoft .NET Framework. Windows services therefore constitute the backbone of the system. They can be hosted on physical or virtual machines running Windows XP, Windows 2003 Server, Windows Vista, or Windows 2008 Server. For large installations of Barr EOM, we recommend that these services be installed on machines running server operating systems. Throughout this manual, any machine that has at least one EOM service installed is called an EOM Server.

The following services are available in Barr EOM:

- Barr EOM DBM Service
- Barr EOM Input Service
- Barr EOM Output Service
- Barr EOM SNMP Service
- Barr EOM Rules Agent Service

Only one instance of each of these services can be installed on a single server. For example, all five services can be installed on a server, but only one instance of each service can be installed on that server. This is also true for the Barr EOM Windows Port Monitor.

Barr EOM DBM Service

The Barr EOM DBM (database manager) Service is the central point through which all other services and user interfaces communicate. Every action or request from another EOM service or an EOM user interface goes through the DBM Service. The DBM Service is also the only service that communicates with the database. For large installations of Barr EOM, we recommended using multiple DBM Services, in order to distribute the load. In such cases, all DBM Services would connect to the same EOM database.

Barr EOM Input Service

The Barr EOM Input Service is responsible for receiving documents into Barr EOM. It includes support for all of the source types available in Barr EOM (see Table 1-1).

Multiple Input Services can be used as part of a Barr EOM installation. Each machine on which the Input Service is installed can receive documents.

TABLE 1-1
Source Types

Email	RJE
Other EOMs	Socket
FTP	Web upload
LPD	WebPrint
Network folders	WebSphere MQ
NJE	Windows queues
Print/Channel	

Barr EOM Output Service

The Barr EOM Output Service is responsible for sending documents from Barr EOM to destinations. It includes support for all of the destination types available in Barr EOM (see Table 1-2).

Multiple Output Services can be used as part of a Barr EOM installation. Each machine on which the Output Service is installed can send documents.

TABLE 1-2
Destination Types

Email	NJE
Other EOMs	Print390
Fiery device	PRISMAProduction
FTP	RJE
IPDS	SharePoint
IPP	Socket
LPR	WebSphere MQ
Network folder	Windows queue

Barr EOM SNMP Service

The Barr EOM SNMP Service performs the following two main functions:

- Discovery of printers on the network.
- Continuous monitoring of printer status using SNMP.

Multiple SNMP Services can be used as part of a Barr EOM installation. Each machine on which the SNMP Service is installed can monitor specified printers.

Barr EOM Rules Agent Service

The Barr EOM Rules Agent Service acts as an agent for the rules engine that is integrated in the DBM Service. Certain actions in Barr EOM can be configured to run on other machines. The Rules Agent Service must be installed on the respective machine in order for the action to run correctly. Multiple Rules Agent Services can be used as part of a Barr EOM installation.

Barr EOM Windows Port Monitor

The Barr EOM Windows Port Monitor allows documents printed to Windows queues (also known as Windows printers) to be received into Barr EOM. As part of creating or configuring Windows queues, administrators choose the port associated with the respective queue. By using the Barr EOM Windows Port Monitor, documents printed to the queue arrive into Barr EOM instead of going directly to the printer. The Barr EOM Windows Port Monitor must be installed on any Windows machine that hosts local printers intended to be used as sources for Barr EOM.

Barr EOM user interfaces

There are several user interfaces that administrators, operators, and end users can use to interact with Barr EOM. These user interfaces vary in terms of platforms they can be run on, richness of features, and footprint.

EOM Console

The EOM Console is the main user interface for Barr EOM. Designed in C#, it can be installed on any machine running Windows XP, Windows 2003 Server, Windows Vista, or Windows 2008 Server. Multiple EOM Consoles can connect to the same DBM Service simultaneously.

The EOM Console is the most feature-rich Barr EOM user interface. It can be used by administrators to configure the product, operators to manage destinations and documents, and end users to access active, retained, and archived documents. Granular security controls provide varied access to features, depending on the identity of the logged-in user.

EOM Web Interface

The EOM Web Interface can be accessed from any Web browser, regardless of the operating system of the machine. This user interface is targeted towards operators and end users, so it lacks the administrative features of the EOM Console.

The following functions are available in the EOM Web Interface:

- Displaying the list of active and retained documents.
- Downloading and viewing the contents of documents.
- Routing documents to destinations.
- Changing the state of documents.
- Reprinting documents.

EOM Desktop Client

The EOM Desktop Client is designed for Windows workstations in typical office print environments. It is a small-footprint software package that can be deployed using any desktop deployment application. Running as a tray application, the EOM Desktop Client provides end users with the ability to see the status of documents they submit, and perform tasks such as changing the state, reprinting, or rerouting documents. It also supports the downloading and viewing of documents.

The EOM Desktop Client includes functionality related to accounting and cost control. It can be configured to generate pop-up windows so that users can associate the proper billing accounts with the documents they are printing. The EOM Desktop Client can also monitor users' local printing, such as documents going to USB and parallel port printers, as well as direct IP printing.

Barr EOM embedded interfaces

In addition to the user interfaces running on PC platforms, Barr EOM also supports user interfaces embedded in certain printer models. These embedded user interfaces allow users who walk up to the printers to see the list of their documents in Barr EOM. Documents can then be released for printing or reprinted from the printer.

1.3 System requirements

The Barr EOM requirements are described below for each component.



These are basic recommendations. Specific requirements are dependent on the operating system, expected production volume, and other applications.

EOM Services

Install the EOM services on a server or workstation that meets the following minimum requirements.

Software requirements

- Windows XP Professional, Windows Vista, Windows 2003 Server, or Windows 2008 Server
- Microsoft .NET Framework version 3.5 Service Pack 1
- SQL Server 2005

Hardware requirements

- 3.0 GHz or equivalent multi-core processor
- 2 gigabytes (GB) of RAM without SQL Server Express (4 GB with SQL Server Express)
- 500 GB hard drive

EOM Console

Standalone EOM Console installations should meet the following minimum requirements.

Software requirements

- Windows XP Professional, Windows Vista, Windows 2003 Server, or Windows 2008 Server
- Microsoft .NET Framework version 3.5 Service Pack 1

Hardware requirements

- 1.6 GHz processor
- 1 GB of RAM (2 GB with Windows Vista)

EOM Web Server

Install the EOM Web Server on a server or workstation that meets the following minimum requirements.

Software requirements

- Windows XP Professional, Windows Vista, Windows 2003 Server, or Windows 2008 Server
- Microsoft .NET Framework version 3.5 Service Pack 1
- SQL Server 2005
- Internet Information Server (IIS) version 5.1, 6.x, or 7.x

Hardware requirements

- 3.0 GHz or equivalent multi-core processor
- 2 GB of RAM without SQL Server Express (4 GB with SQL Server Express)
- 500 GB hard drive

EOM Web Client

The EOM Web client requires one of the following browsers.

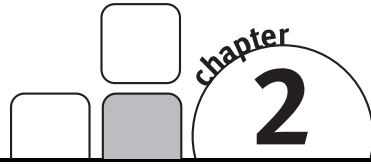
- Internet Explorer version 7 or later
- Fire Fox

1.4 Package contents

Your Barr EOM package includes these items:

- CD-ROM containing the Barr EOM software and HTML Help
- *Getting Started with Barr EOM* (this manual)

Install the Software



Follow the steps in this chapter to install the Barr EOM software. Refer to the appropriate section depending on the type of installation you will be performing, installing on a single machine, server farm, or failover cluster. When you finish the installation, refer to Chapter 3 for instructions about configuring and using the software.

2.1 Install on a single machine

Follow the steps in this section to install all of the Barr EOM components on a single machine. First you will need to prepare the network for installation. Next you will install the database, services, and user interfaces. After the installation is complete, you will configure the file store and install the license.

If you are reinstalling Barr EOM or installing a newer version, first perform the steps in Section 2.5 to remove the existing software.

Prepare the network

Before you install the Barr EOM software, complete the following steps to prepare the network.

1. Set up local administrators.
 - a. From Windows Explorer, right-click **My Computer** and select **Manage**.
 - b. From the **Computer Management** window, expand **Local Users and Groups** and select **Groups**.
 - c. In the grid that is displayed, double-click **Administrators**. The **Administrators Properties** window is displayed.
 - d. Click **Add** and add the following users:
 - The user account designated as the EOM Services logon account.
 - All users who will be administrators for the EOM Console. These users will have unrestricted access to the EOM Console.
2. Set up Microsoft SQL Server Administrators. This setup must be done by an existing SQL Server Administrator. Give the administrator a list of the users who will need full rights to the EOM installation.

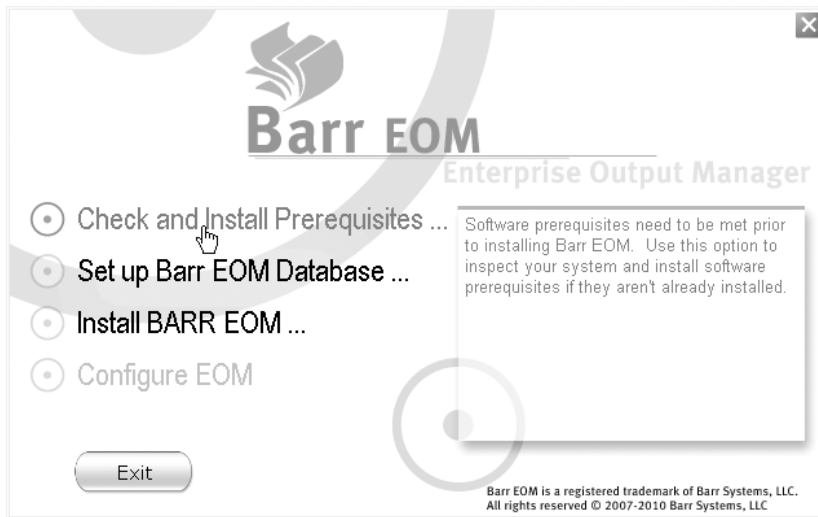
3. Configure the network firewall setup to allow the following:
 - 515 TCP for LPR/LPD traffic
 - All the ports the EOM sockets will use
 - File and printer sharing
4. If you are using Windows firewall, the **Barr EOM Server Configuration Utility** will automatically add exceptions for the following Barr EOM services. If you are using other firewalls, add the following programs to the exception list for all TCP and UDP ports. Refer to the operating system Help for more information about modifying the firewall configuration.
 - Barr EOM DBM Service
 - Barr EOM Input Service
 - Barr EOM Output Service
 - Barr EOM Rules Agent Service
 - Barr EOM SNMP Service
5. Create a file store folder on this server and configure its **Sharing and Security** for EOM use.
 - a. From Windows Explorer, create a file store folder on this server.
 - b. Right click the new folder and select **Sharing and Security**.
 - c. From the **Sharing** tab, make sure that the folder is configured to share and click **Permissions**.
 - d. From the **Share Permissions** tab, click **Add** and add the EOM Services logon account user name. Grant the user name **Full Control** permissions. Click **OK**.
 - e. From the **Security** tab, verify that the Administrators group has **Full Control** permissions.
 - f. Click **OK**. These settings will be used for Windows folders that are the Network Folder source and destination type.

Install the software

Follow the instructions in this section to install the Barr EOM software. The setup program copies files from the Barr EOM CD to your computer. Before you run the setup program, exit from all Windows programs.

1. Insert the Barr EOM CD into the CD-ROM drive. The Barr EOM Setup program is automatically displayed. If autorun is disabled on your system or if the setup program is not automatically displayed, right-click **Start** on the taskbar and select **Explore**. Navigate to the CD-ROM drive and double-click **Autorun.exe**.

The Barr EOM installation window appears. Notice, as you move the pointer over the links, that text appears describing the purpose of each link.



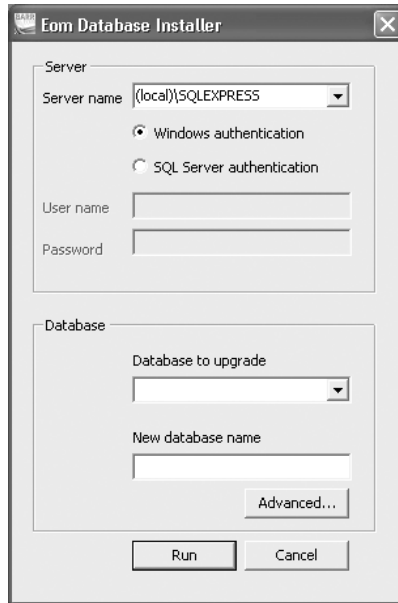
2. Verify that all software prerequisites are installed. If the prerequisites are not met, red text is displayed below the link stating **Software prerequisites are not met**. If this text does not appear, skip to the “To install the database” section.

If the red text is shown, click **Check and Install Prerequisites**. The window that is displayed lists all of the software prerequisites along with their installation statuses. Next to each item that is not installed, an **Install Now** button is displayed. Click the **Install Now** button for each item and follow the steps to install the appropriate software. Once everything is installed, click **Back**.

To install the database

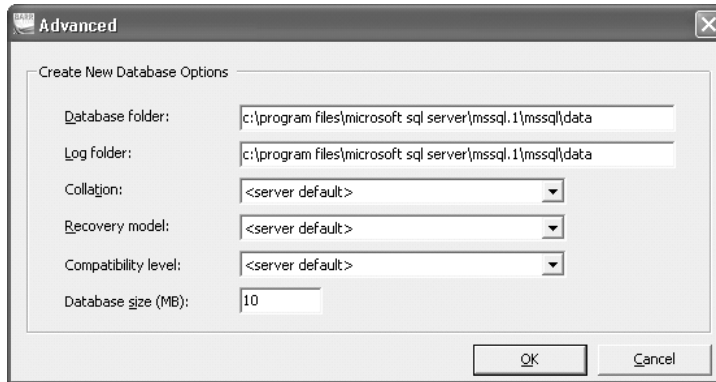
1. Click **Set up Barr EOM Database**.
2. If you do not have an SQL Server that you plan to use, click **Install SQL Express** and follow the wizard steps to install SQL Express.

3. Click **Set up EOM Database**. The Barr EOM database scripts are installed. The **EOM Database Installer** dialog box is displayed.



4. From the **Server name** drop-down list, select the server on which SQL Server is installed. If SQL Server is installed on the computer on which EOM is being installed, use one of the default selections, depending on the SQL Server instance name: (local)\SQLEXPRESS or (local). Note that the local server name will not appear in this list; you will see only (local) or (local)\SQLEXPRESS.
5. Chose the authentication method. In most cases, select **Windows authentication**. If you select **SQL Server authentication**, enter a user name and password.
6. If you are upgrading to a newer version, enter the database name you are upgrading from in the **Database to upgrade** field. If you are not upgrading, then leave the field blank.
7. In the **New database name** box, enter the database name.

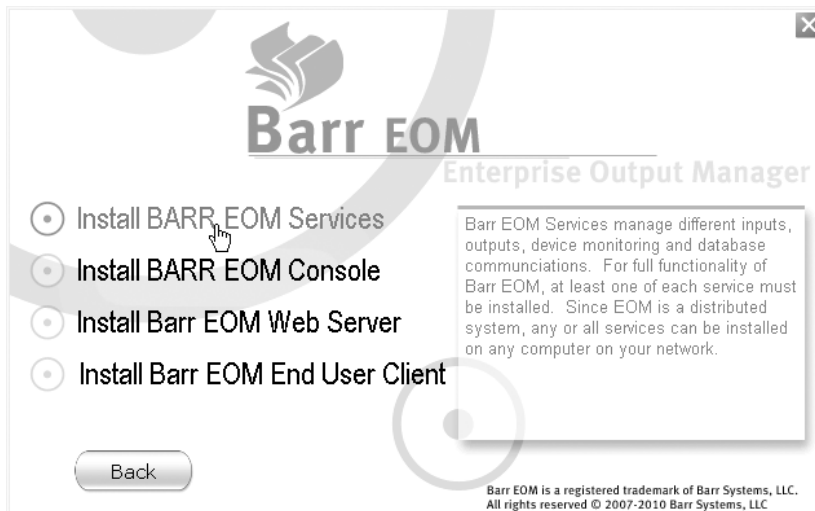
8. Click **Advanced** to verify that the database configuration settings are appropriate. We recommend leaving the default settings, unless your SQL administrator requires different settings. Click **OK**.



9. Click **Run**.
10. A confirmation message is displayed. Click **Yes** to indicate that you want to create the database. When a message is displayed indicating that the database is successfully installed, click **OK**.
11. Click **Back**.

To install the services

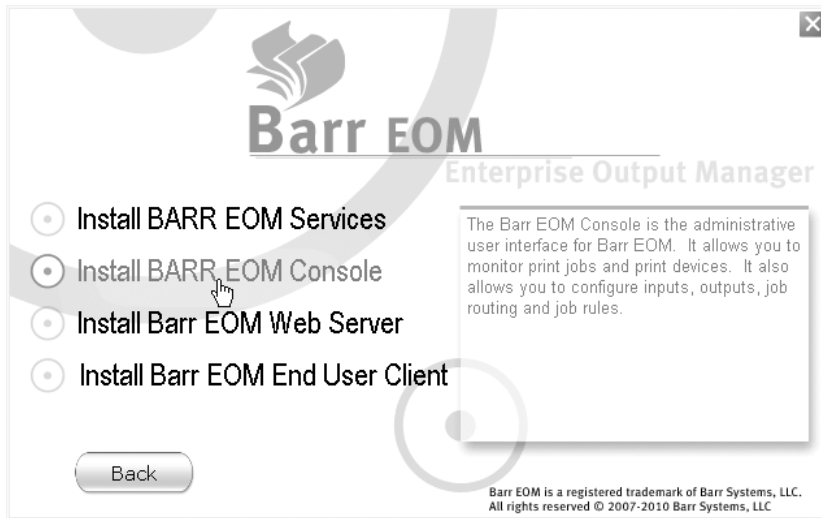
1. Click **Install BARR EOM**.
2. Click **Install BARR EOM Services**.



3. From the **Barr EOM Services** wizard, read the information on the **Welcome** dialog box, and then click **Next**.
4. To install the software, you must accept the terms of the license agreement. Review the license agreement and then select **I accept the terms in the license agreement**. Click **Next**.
5. Select the **Complete** setup type and click **Next**.
6. Click **Install** and wait for the installation to complete. Click **Finish**.

To install the EOM Console

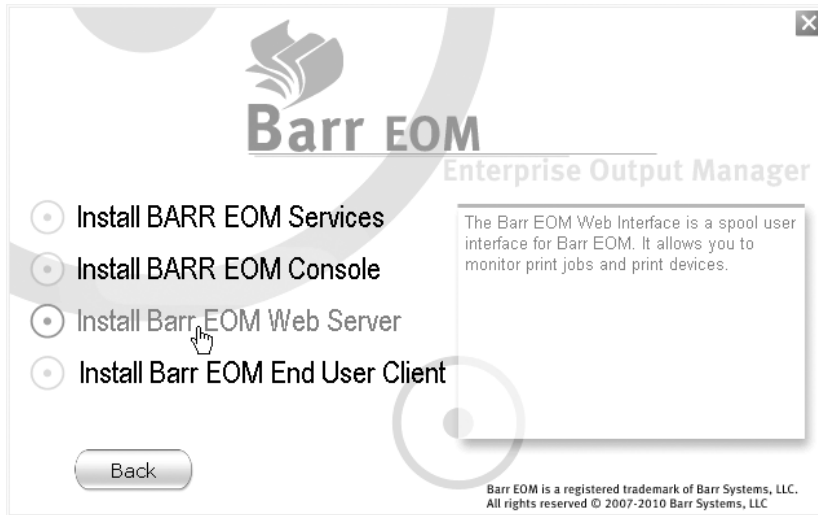
1. Click **Install BARR EOM Console**.



2. From the **Barr EOM Console** wizard, read the information on the **Welcome** dialog box, and then click **Next**.
3. To install the software, you must accept the terms of the license agreement. Review the license agreement and then select **I accept the terms in the license agreement**. Click **Next**.
4. Click **Install** and wait for the installation to complete. Click **Finish**.
5. Click **Back**.

To install the EOM Web Server

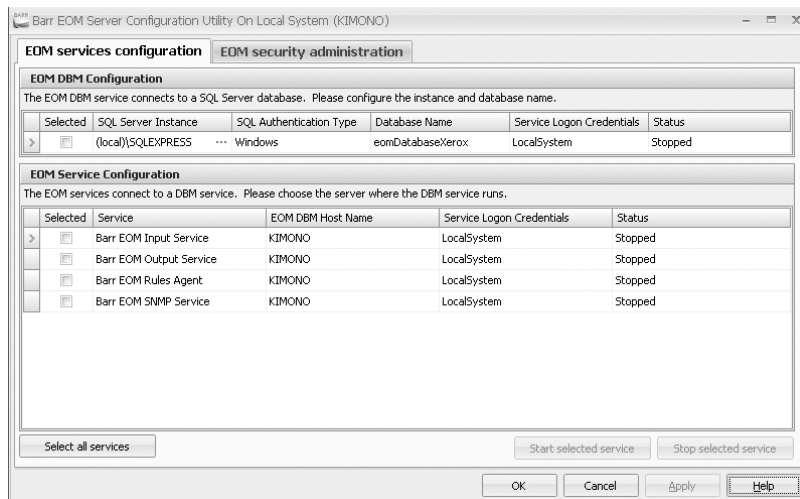
1. Click **Install BARR EOM Web Server**.



2. From the **Barr EOM Web Server** wizard, read the information on the **Welcome** dialog box, and then click **Next**.
3. Select the folder where the EOM Web Server will be installed. The default folder is C:\inetpub\wwwroot\comweb. To choose a different folder, click **Change** and select the appropriate folder. Click **Next**.
4. Click **Install** and wait for the installation to complete. Click **Finish**.
5. In Windows Explorer, open the folder where the Web Server was installed. If you used the default location, open the **C:\inetpub\wwwroot\comweb** folder.
6. Open the **web.config** file. At the bottom of the file, replace the **PRIMARY_DBMHOST** entry with the name of the machine you are using.
7. Save and close the file.

To configure Barr EOM

- On the first installation window, click **Configure EOM**. The **Barr EOM Server Configuration Utility** is displayed. The **SQL Server Instance**, the **Database Name**, and the **EOM DBM Host Name** are automatically configured when the database is created.
 - To complete the automatic configuration, you need only configure the **Service Logon Credentials**. To do this, click in any of the cells in the **Service Logon Credentials** column and click the Browse button. From the **Select User** dialog box, choose **This account** and select the service logon account that was created in the “Prepare the network” section. Selecting an account will require that you complete the password fields. When you are finished, click **OK**. Notice that all of the fields in the column are populated.
 - To configure the Barr EOM DBM Service manually, proceed with step 2.
- Complete the following steps from the **EOM services configuration** tab.



- In the **EOM DBM Configuration** grid, select the EOM DBM service check box in the **Selected** column.
- Click anywhere in the **SQL Server Instance** column and click the Browse (...) button. From the **Browse For SQL Server** dialog box, select the SQL Server\Instance and click **OK**.
- In the **SQL Authentication Type** column, select the authentication type, either SQL or Windows. If you select SQL, the **Specify SQL User** dialog box displays. You will need to enter the user name and password of the SQL user that will be used when connecting to the SQL Server instance. The user must be a member of the **sysadmin** server role for the SQL Server instance.
- Click in the **Database Name** column and click the Browse button. From the **Browse For Database** dialog box, select the database you created previously in the installation process and click **OK**.

- e. Click **Apply**.
 - f. In the **EOM Service Configuration** grid, select all of the check boxes in the **Selected** column. This will select all four of the Barr EOM services.
 - g. Click any of the cells in the **EOM DBM Host Name** column and click the Browse button. From the **Browse For Computer** dialog box, select the computer that your EOM DBM service is running on. Select the **Domain** and **Computer**. When you are finished, click **OK**. Notice that all of the fields in the column are populated.
 - h. Click in any of the cells in the **Service Logon Credentials** column and click the Browse button. From the **Select User** dialog box, choose how the service will log on. You can decide whether it will log on as a local system account or you can enter a specific account. Use Local System Account if the DBM will communicate with the local SQL database, local EOM services, and local file resources. All other cases use a Windows Service account for the log on. In most cases, you will select **This account** and select the service logon account that was created in the “Prepare the network” section. Selecting an account will require you to complete the password fields. When complete, click **OK**. Notice all of the fields in the column are populated.
 - i. Click **Apply**.
 - j. Verify that all of the items are selected and click **Start Selected Service**. Notice that the status column changes to **Running** for all services.
- 3. Select the **EOM security administration** tab. All fields are populated with the previous selections.
 - 4. Click **Connect**. The text box now displays **Successful Connection**.
 - 5. Under the **Users and Groups** grid, add users who will have full administrative rights to EOM Console. You can click **Add** to select users or click **Add Current User** to add the currently signed in user. These users must be members of the Administrative group on the server and have administrative rights to the database. It is important to remember that the users added here will have unrestricted rights to Barr EOM.
 - 6. Click **Apply**.
 - 7. Click **OK**.
 - 8. Close the autorun by clicking the red close (x) button. The software installation is complete.

To configure the EOM SQL Server to connect using SQL authentication



If you selected to use SQL for the SQL authentication type on the EOM services configuration tab, you must complete this procedure. If you chose to use Windows for the SQL authentication type, you can skip these steps and proceed to the “Configure the file store” section.

Complete the following steps to configure the EOM SQL Server to connect using SQL authentication.

1. Open **Microsoft SQL Server Management Studio Express**. (You can access this utility by clicking Start | All Programs | Microsoft SQL Server 2005 | **Microsoft SQL Server Management Studio Express**.)
2. Configure the authentication mode.
 - a. Right-click the SQL Server instance and select **Server Properties**. The **Server Properties** dialog box displays.
 - b. In the left pane, select **Security**.
 - c. Under **Server authentication**, select **SQL Server and Windows Authentication mode**.
 - d. Click **OK**.
 - e. If the server authentication was changed from **Windows Authentication Mode** to **SQL Server and Windows Authentication mode**, you must restart the SQL Server. Right-click the SQL Server instance in the tree and choose to restart when all databases are available to be restarted.
3. Configure the password.
 - a. In the tree, expand the **Security** folder and then the **Login** folder. Right-click the appropriate users and select **Properties**. The **Login Properties** dialog box displays.
 - b. In the left pane, select **General**.
 - c. Enter the appropriate user password in the **Password** and **Confirm password** boxes.
 - d. Click **OK**.
4. Add the user to the sysadmin role.
 - a. In the tree, expand the **Security** folder and then the **Server Roles** folder. Right-click the **sysadmin** role and select **Properties**. The **Server Role Properties** dialog box displays.
 - b. Click **Add**. The **Select Logins** dialog box displays.
 - c. Click **Browse** and select the users you need to add to the sysadmin role and click **OK**. If necessary, click **Check Names** to verify the names and then click **OK**.
 - d. On the **Server Role Properties** dialog box, click **OK**.
5. Close **Microsoft SQL Server Management Studio Express** and log back in using the new sysadmin user.

Configure the file store

Barr EOM stores only the properties of a document. The actual files are stored in network folders, called file stores. Initially administrators must configure a default file store in the Administration application. Administrators can then define additional file stores for individual sources.

Complete the following steps to configure the default file store.

1. Double-click the EOM Console icon on your desktop.
2. When the warning message is displayed, click **Yes** to select the file store now. The **Set General Preferences** utility is displayed.

The Administration dialog box contains the following settings:

- EOM instance name:
- Use disconnected mode: ☐
- Save auditing information: ☒
- Maximum message log size: entries
- Save accounting information: ☒
- Output history period: days
- Retain documents: ☒
- Default retention period: days
- Maximum retain size: documents
- Refresh external resources: ☒
- External resource refresh period: minutes
- Desktop client refresh period: minutes
- Reporting query timeout: seconds
- Require strong passwords: ☐
- Password expiration period: days
- Passwords to save in history:
- Global destination capabilities:

Document file store path:

Location	Default	Status
> \\Eomtest2-2k3\NetworkFileStore	☒	In-use
\\Eomtest2-2k3\Barr Files\FileStore1	☐	In-use

Buttons: Add, Edit, Remove, Details...

Footer buttons: Refresh, Apply, Cancel, Help

3. To add a file store, under **Document file store path**, click **Add**. The **File Store** dialog box displays.
4. Enter the network folder path where the Barr EOM files are stored or click the Browse button to select a folder. The Barr EOM DBM Service will need to have permissions assigned to access the selected network folder. Verify the file store folder does not contain any empty folders. Empty folders in the file store folder will be deleted with the EOM cleanup process runs.

5. Click **OK**.
6. To select a default file store, in the grid click the **Default** check box cell for the appropriate file store. The default file store will be used when a file store has not been specified.



You can define multiple file stores that will be available for selection from individual sources on the **More Settings** tab. The default file store is selected by default. If you select one of the other file stores for a source, all of the documents arriving via that source will be stored in the selected file store.

To modify a file store, select a file store in the grid and click **Edit**. The **File Store** dialog box is displayed. To view usage details of the drive where the file store is located, select a file store in the grid and click **Details**. To remove a file store, select file store with a status of **New** and click **Remove**. You can only remove file stores with a **New** status.

7. To save the changes, click the **Apply** button.

Install the license

Complete the following steps to install a Barr EOM license.

8. From the EOM Console navigation pane, select the **Administration** application.
9. In the navigation pane, click **Manage License**. The **Manage License Utility** is displayed in the right panel.

Administration - Manage License

License key: License Wizard Customer: BARR SYSTEMS INC
Gainesville
FL

Serial number:

License Status: Activated, version (3.0.85.0)

Drag a column header here to group by that column

Description	Quantity	Expires	Licensed Behavior	Unlicensed Behavior
> Barr EOM	1	12/31/9999 11:59:59 PM	Enabled	Hidden
Network Folders (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
LPD (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
IP Socket (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
FTP (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
RJE (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
NJE (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
MQ Series (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
Email (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
Windows Queues (Outp...	1	12/31/9999 11:59:59 PM	Enabled	Hidden
Network Folder (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
LPR (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
IP Socket (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
FTP (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
RJE (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
NJE (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden

Refresh Cancel Apply Help

10. Click **License Wizard**. The **License wizard** is displayed.

11. On the **License Operation** dialog box, select **Install and activate a new license**. Click **Next**.

12. On the **License File Installation** dialog box, determine if you want to install the license automatically using an Internet connection or manually by selecting the license file.

- To install the license automatically, select the radio button next to **Install License Automatically**. An internet connection is required to install automatically. Enter the **License key** for this Barr EOM system and click **Next**.



During Barr EOM order processing an EOM license was created that matches the options ordered. The license key was sent in an email to the ordering customer. If you cannot locate your license key, contact Barr Systems Technical Support or Sales for assistance.

- To install the license manually, select the radio button next to **Install License Manually**. In the **License file** box, type the path and file name of your license file or click the Browse button to locate the file and select it. Click **Next**.

13. On the **License Confirmation** dialog box, confirm the license information is correct and click **Next**.



The **Next** button will not activate if the **Serial** and **Order** numbers do not match. The order number is the same number as the Barr invoice number.

14. On the **Activate License** dialog box, determine if you want to activate the software at this time.

- To activate the software, see section 4.5 “Manage the Barr EOM license” for instructions.
- To complete the installation without activating the license, select **Skip activation at this time**, click **Next**, and click **Finish**. You can activate the license at a later time using the **License wizard**.

2.2 Install on a server farm

A single Barr EOM installation can have its components distributed across multiple systems that use a single SQL database. The following components can be distributed:

- Microsoft SQL Server
- Barr EOM Services (Barr EOM DBM Service, Barr EOM Input Service, Barr EOM Output Service, Barr EOM Rules Agent Service, and Barr EOM SNMP Service)
- Barr EOM Port Monitor
- EOM Console

Use the following general guidelines when you are installing Barr EOM on multiple servers:

- The Barr EOM services can all be installed on one server or across multiple servers. But there can only be one instance of each service on a single server. For example, there cannot be two Barr EOM Input Services on the same server.
- There can be multiple Barr EOM DBM Services in a distributed EOM installation, each DBM on its own server.
- The Barr EOM DBM Service is the only service that communicates with the EOM database. The Barr EOM Input Service, Barr EOM Output Service, Barr EOM Rules Agent Service, and Barr EOM SNMP Service are all assigned to a Barr EOM DBM service. The Barr EOM DBM Service provides the necessary database information to the assigned EOM services. You must use the **EOM Server Configuration Utility** to configure the communication link between the Barr EOM DBM services and the other EOM services.
- All of the Barr EOM DBM Services must be configured for the same Microsoft SQL server\instance and database. To do this, you must configure the **EOM Server Configuration Utility** on each server that has an EOM DBM Service installed.
- To convert Windows queues into EOM queues, install the following EOM components on the print server containing the Windows queues. Once the EOM components are installed on the server, you can convert the Windows queues using the EOM Console utility Windows Queue Converter.
 - Barr EOM Input Service
 - File store for the server's converted Windows queues
 - Barr EOM Output Service
 - Barr EOM Port Monitor – The port monitor replaces the Windows IP port with a Windows printer port designed to send files to Barr EOM.

Complete the following sections to install the desired Barr EOM components on the first system. Once the first installation is complete, you can continue installing components on various servers. After the first Barr EOM DBM Service is configured and started, any other services that will communicate through that DBM can be configured and started. If additional DBM services were installed, you can repeat this procedure for each service.

To install the software you will first need to prepare the network for installation. Next you will install the database, services, and user interfaces. After the installation is complete, you will configure the file stores.

If you are reinstalling Barr EOM or installing a newer version, follow the steps in Section 2.5 to remove the existing software.

Prepare the network

Before you install the Barr EOM software, complete the following steps to prepare the network.

1. Set up local administrators.
 - a. From Windows Explorer, right-click **My Computer** and select **Manage**.
 - b. From the **Computer Management** window, expand **Local Users and Groups** and select **Groups**.
 - c. In the grid that is displayed, double-click **Administrators**. The **Administrators Properties** window is displayed.
 - d. Click **Add** and add the following users:
 - The user account designated as the EOM Services logon account.
 - All users that will be administrators for the EOM Console. These users will have unrestricted access to the EOM Console.
2. Set up Microsoft SQL Server Administrators. This must be done by an existing SQL Server Administrator. Give the administrator a list of the users who will need full rights to the EOM installation.
3. Configure the network firewall setup to allow the following:
 - 515 TCP for LPR/LPD traffic
 - All the ports that the EOM sockets will use
 - File and printer sharing
4. If you are using Windows firewall, the **Barr EOM Server Configuration Utility** will automatically add exceptions for the following Barr EOM services. If you are using other firewalls, you will need to add the following programs to the exception list for all TCP and UDP ports. Refer to the operating system Help for more information about modifying the firewall configuration.
 - Barr EOM DBM Service
 - Barr EOM Input Service
 - Barr EOM Output Service
 - Barr EOM Rules Agent Service
 - Barr EOM SNMP Service
5. Create a file store folder on this server and configure its **Sharing and Security** for EOM use.
 - a. From Windows Explorer, create a file store folder on this server.
 - b. Right click the new folder and select **Sharing and Security**.
 - c. From the **Sharing** tab, make sure that the folder is configured to share and click **Permissions**.
 - d. From the **Share Permissions** tab, click **Add** and add the EOM Services logon account user name. Grant the user name **Full Control** permissions. Click **OK**.

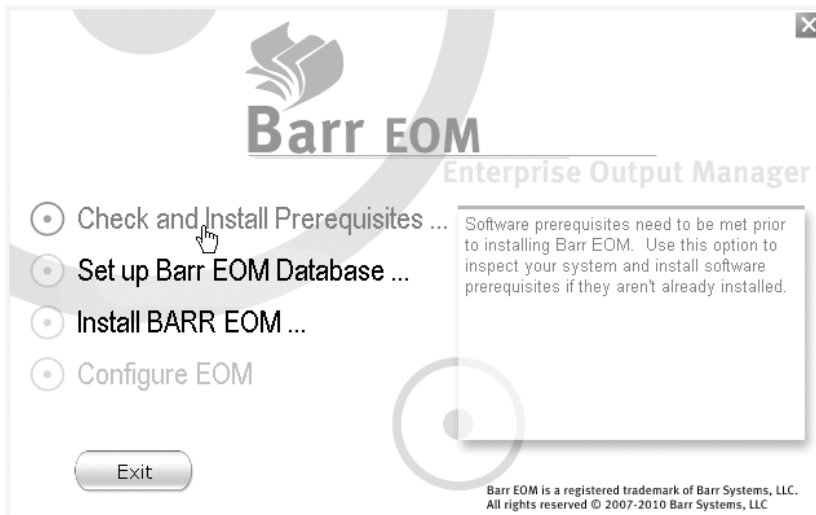
- e. From the **Security** tab, verify the Administrators group has **Full Control** permissions.
- f. Click **OK**. These settings will be used for Windows folders that are the Network Folder source and destination type.

Install the software

Follow the instructions in this section to install the Barr EOM software. The setup program copies files from the Barr EOM CD to your computer. Before you run the setup program, exit from all Windows programs.

1. Insert the Barr EOM CD into the CD-ROM drive. The Barr EOM Setup program is automatically displayed. If autorun is disabled on your system or if the setup program does not automatically display, right-click **Start** on the taskbar and select **Explore**. Navigate to the CD-ROM drive and double-click **Autorun.exe**.

When the Barr EOM Install window appears, notice, as you move the pointer over the links, that text appears describing the purpose of each link.

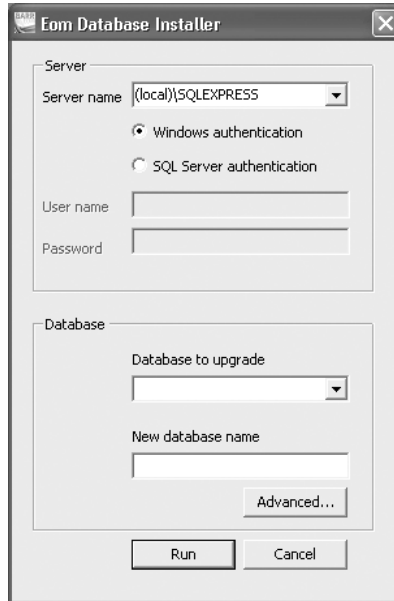


2. Verify that all software prerequisites are installed. If the prerequisites are not met, red text will be displayed below the link stating **Software prerequisites are not met**.

If this text does not appear, continue with the “To install the database” section. If the red text is shown, click **Check and Install Prerequisites**. The window that is displayed lists all of the software prerequisites along with their installation status. Next to each item that is not installed, an **Install Now** button is displayed. Click the **Install Now** button for each item and follow the steps to install the appropriate software. Once everything is installed, click **Back**.

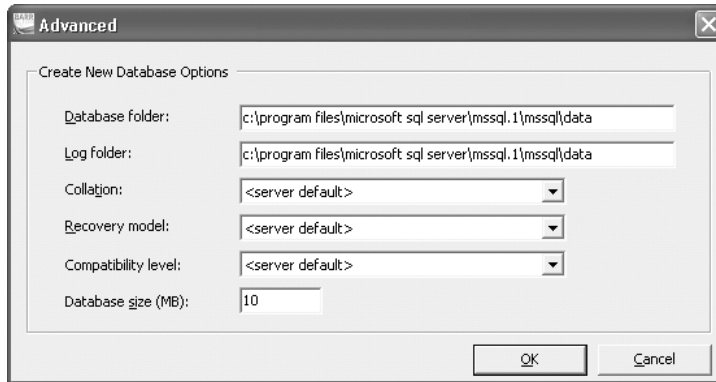
To install the database

1. Click **Set up Barr EOM Database**.
2. If you do not have an SQL Server that you plan to use, click **Install SQL Express** and follow the wizard steps to install SQL Express.
3. Click **Set up EOM Database**. The Barr EOM database scripts are installed. The **EOM Database Installer** dialog box is displayed.



4. From the **Server name** drop-down list, select the server on which SQL Server is installed. If SQL Server is installed on the computer on which EOM is being installed, use the default selection either: (local)\SQLEXPRESS or (local), depending on the SQL Server instance name. Note that the local server name will not appear in this list; you will see only (local) or (local)\SQLEXPRESS.
5. Choose the authentication method. In most cases, select **Windows authentication**. If you select **SQL Server authentication**, enter a user name and password.
6. If you are upgrading to a newer version, enter the existing database name in the **Database to upgrade** field. If you are not upgrading, then leave the field blank.
7. In the **New database name** box, enter the database name.

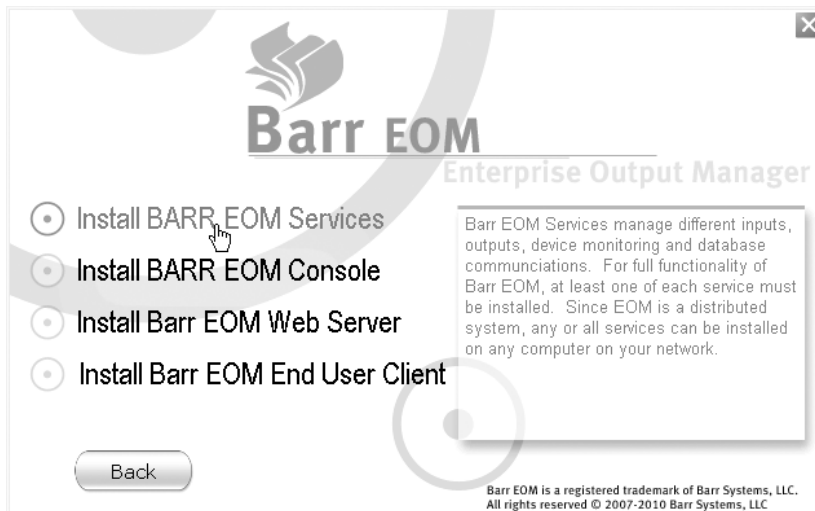
8. Click **Advanced** to verify that the database configuration settings are appropriate. We recommend using the default settings, unless your SQL administrator requires different settings. Click **OK**.



9. Click **Run**.
10. A confirmation message is displayed. Click **Yes** to indicate that you want to create the database. When a message is displayed indicating that the database is successfully installed, click **OK**.
11. Click **Back**.

To install the services

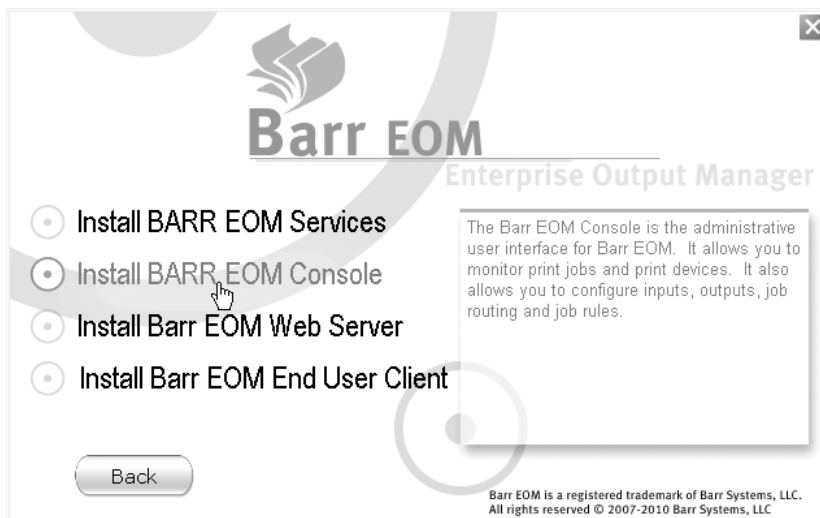
1. Click **Install BARR EOM**.
2. Click **Install BARR EOM Services**.



3. From the **Barr EOM Services** wizard, read the information on the **Welcome** dialog box, and then click **Next**.
4. To install the software, you must accept the terms of the license agreement. Review the license agreement and then select **I accept the terms in the license agreement**. Click **Next**.
5. Determine the type of service installation you want: **Complete** (all services are installed) or **Custom** (you choose the services to install).
 - For a complete installation, select **Complete** and click **Next**.
 - For a custom installation, select **Custom** and click **Next**. For each service you do not want installed, click the drop-down list before the service name and select **This feature will not be available**. Once you have specified which services you want installed, click **Next**.
6. Click **Install** and wait for the installation to complete. Click **Finish**.

To install the EOM Console

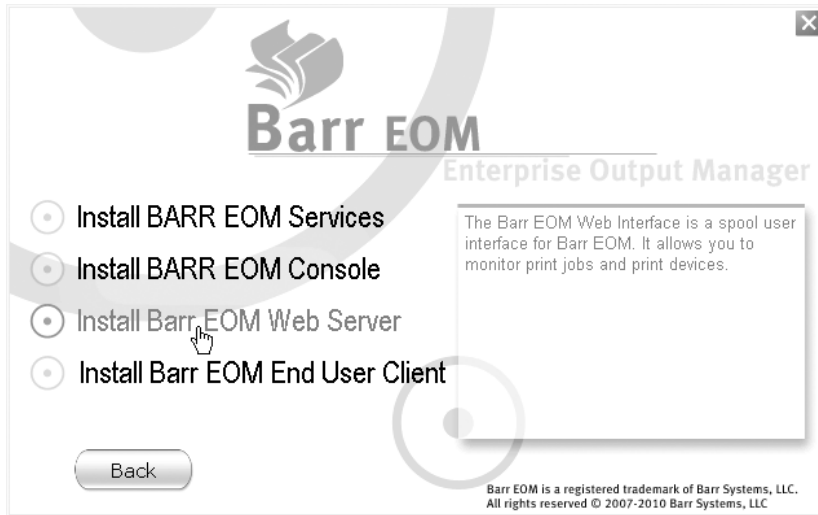
1. Click **Install BARR EOM Console**.



2. From the **Barr EOM Console** wizard, read the information on the **Welcome** dialog box, and then click **Next**.
3. To install the software, you must accept the terms of the license agreement. Review the license agreement and then select **I accept the terms in the license agreement**. Click **Next**.
4. Click **Install** and wait for the installation to complete. Click **Finish**.
5. Click **Back**.

To install the EOM Web Server

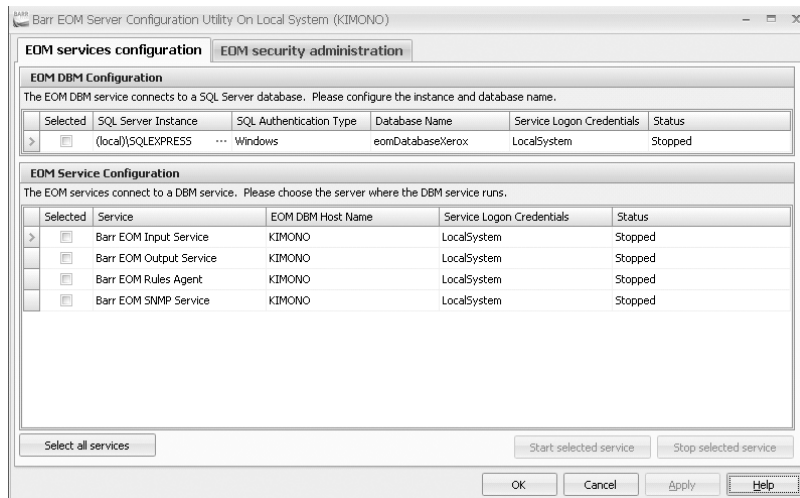
1. Click **Install BARR EOM Web Server**.



2. From the **Barr EOM Web Server** wizard, read the information on the **Welcome** dialog box, and then click **Next**.
3. Select the folder where the EOM Web Server will be installed. The default folder is C:\inetpub\wwwroot\comweb. To choose a different folder, click **Change** and select the appropriate folder. Click **Next**.
4. Click **Install** and wait for the installation to complete. Click **Finish**.
5. In Windows Explorer, open the folder where the Web Server was installed. If you used the default location, open the **C:\inetpub\wwwroot\comweb** folder.
6. Open the **web.config** file. At the bottom of the file, replace the **PRIMARY_DBMHOST** entry with the name of the machine you are using.
7. Save and close the file.

To configure Barr EOM

- On the first installation window, click **Configure EOM**. The **Barr EOM Server Configuration Utility** is displayed. The **SQL Server Instance**, the **Database Name**, and the **EOM DBM Host Name** are automatically configured when the database is created.
 - To complete the automatic configuration, you need only configure the **Service Logon Credentials**. To do this, click in any of the cells in the **Service Logon Credentials** column and click the Browse button. From the **Select User** dialog box, choose **This account** and select the service logon account that was created in the “Prepare the network” section. Selecting an account will require that you complete the password fields. When you are finished, click **OK**. Notice that all of the fields in the column are populated.
 - To configure the Barr EOM DBM Service manually, proceed with step 2.
- Complete the following steps from the **EOM services configuration tab** to manually set up the EOM DBM configuration.



Your next step depends on whether Barr EOM DBM Service is installed on the server you are configuring. Complete the steps in the pertinent section below.

If the server has a Barr EOM DBM Service

- In the **EOM DBM Configuration** grid, select the EOM DBM service check box in the **Selected** column.
- Click in the **SQL Server Instance** column and click the Browse (...) button. From the **Browse For SQL Server** dialog box, select the SQL Server\Instance and click **OK**.

- c. In the **SQL Authentication Type** column, select the authentication type, either SQL or Windows. If you select SQL, the **Specify SQL User** dialog box displays. You will need to enter the user name and password of the SQL user that will be used when connecting to the SQL Server instance. The user must be a member of the **sysadmin** server role for the SQL Server instance.
- d. Click in the **Database Name** column and click the Browse button. From the **Browse For Database** dialog box, select the database you created previously in the installation process and click **OK**.
- e. Click **Apply**.
- f. In the **EOM Service Configuration** grid, select all of the check boxes in the **Selected** column, selecting all four of the Barr EOM services.
- g. Click in any of the **EOM DBM Host Name** column cells and click the Browse button. From the **Browse For Computer** dialog box, select the server that your EOM DBM service is running on. You will need to select the **Domain** and **Computer**. When complete, click **OK**. Notice all of the fields in the column are populated.
- h. Click in any of the cells in the **Service Logon Credentials** column and click the Browse button. From the **Select User** dialog box, choose **This account** and select the service logon account that was created in the “Prepare the network” section. Selecting an account will require that you complete the password fields. When you are finished, click **OK**. Notice that all of the fields in the column are populated.
- i. Click **Apply**.
- j. Verify that all of the items are selected and click **Start Selected Service**. Notice that the status column changes to a value of **Running** for all services.
- k. Select the **EOM security administration** tab. Notice all fields are populated with the previous selections.

If the server does not have a Barr EOM DBM Service:



If the Barr EOM DBM Service is not running on the server, the **EOM DBM Configuration** grid will not appear in the window. Configure the services listed in the **EOM Service Configuration** grid.

- a. In the grid, click in any of the **EOM DBM Host Name** column cells and click the Browse button. From the **Browse For Computer** dialog box, select the server that your EOM DBM service is running on. Select the **Domain** and **Computer**. When you are finished, click **OK**. Notice that all of the fields in the column are populated.
- b. Click in any of the cells in the **Service Logon Credentials** column and click the Browse button. From the **Select User** dialog box, choose **This account** and select the service logon account that was created in the “Prepare the network” section. Selecting an account will require that you complete the password fields. When you are finished, click **OK**. Notice that all of the fields in the column are populated.
- c. Click **Apply**.

- d. Verify that all of the items are selected and click **Start Selected Service**. Notice that the status column changes to a value of **Running** for all services.
 - e. Select the **EOM security administration** tab.
 - f. In the **SQL Server\Instance** box, click the Browse (...) button. From the **Browse For SQL Server** dialog box, select the SQL Server\Instance and click **OK**.
 - g. In the **Database** box, click the Browse button. From the **Browse For Database** dialog box, select the database you created previously in the installation process and click **OK**.
 - h. In the **Authentication** drop-down box, select the authentication type, either SQL or Windows. If you select SQL, you will need to enter an SQL authenticated **Login** and **Password**.
3. Click **Connect**. The text box now displays **Successful Connection**.
 4. Under the **Users and Groups** grid, add users who will have full administrative rights to EOM Console. You can click **Add** to select users or click **Add Current User** to add the currently signed in user. These users must be members of the Administrative group on the server and have administrative rights to the database. It is important to remember that the users added here will have unrestricted rights to Barr EOM.
 5. Click **Apply**.
 6. Click **OK**.
 7. Click **Exit**. The software installation is complete.

To configure the EOM SQL Server to connect using SQL authentication



If you selected to use SQL for the SQL authentication type on the EOM services configuration tab, you must complete this procedure. If you chose to use Windows for the SQL authentication type, you can skip these steps and proceed to the “Configure the file store” section.

Complete the following steps to configure the EOM SQL Server to connect using SQL authentication.

1. Open **Microsoft SQL Server Management Studio Express**. (You can access this utility by clicking Start | All Programs | Microsoft SQL Server 2005 | **Microsoft SQL Server Management Studio Express**.)
2. Configure the authentication mode.
 - a. Right-click the SQL Server instance and select **Server Properties**. The **Server Properties** dialog box displays.
 - b. In the left pane, select **Security**.
 - c. Under **Server authentication**, select **SQL Server and Windows Authentication mode**.

- d. Click **OK**.
 - e. If the server authentication was changed from **Windows Authentication Mode** to **SQL Server and Windows Authentication mode**, you must restart the SQL Server. Right-click the SQL Server instance in the tree and choose to restart when all databases are available to be restarted.
3. Configure the password.
 - a. In the tree, expand the **Security** folder and then the **Login** folder. Right-click the appropriate users and select **Properties**. The **Login Properties** dialog box displays.
 - b. In the left pane, select **General**.
 - c. Enter the appropriate user password in the **Password** and **Confirm password** boxes.
 - d. Click **OK**.
4. Add the user to the sysadmin role.
 - a. In the tree, expand the **Security** folder and then the **Server Roles** folder. Right-click the **sysadmin** role and select **Properties**. The **Server Role Properties** dialog box displays.
 - b. Click **Add**. The **Select Logins** dialog box displays.
 - c. Click **Browse** and select the users you need to add to the sysadmin role and click **OK**. If necessary, click **Check Names** to verify the names and then click **OK**.
 - d. On the **Server Role Properties** dialog box, click **OK**.
5. Close **Microsoft SQL Server Management Studio Express** and log back in using the new sysadmin user.

Configure the file store

Barr EOM stores only the properties of a document. The actual files are stored in network folders, called file stores. Initially administrators must configure a default file store in the Administration application. Administrators can then define additional file stores for individual sources.

Complete the following steps to configure the default file store.

1. Double-click the **EOM Console** icon on your desktop.
2. When the warning message is displayed, click **Yes** to select the file store now. The **Set General Preferences** utility is displayed.
3. To add a file store, under **Document file store path**, click **Add**. The **File Store** dialog box displays.
4. Enter the network folder path where the Barr EOM files are stored or click the **Browse** button to select a folder. The Barr EOM DBM Service will need to have permissions assigned to access the selected network folder. Verify the file store folder does not contain any empty folders. Empty folders in the file store folder will be deleted with the EOM cleanup process runs.
5. Click **OK**.

- To select a default file store, in the grid click the **Default** check box cell for the appropriate file store. The default file store will be used when a file store has not been specified.



You can define multiple file stores that will be available for selection from individual sources on the **More Settings** tab. The default file store is selected by default. If you select one of the other file stores for a source, all of the documents arriving via that source will be stored in the selected file store.

To modify a file store, select a file store in the grid and click **Edit**. The **File Store** dialog box is displayed. To view usage details of the drive where the file store is located, select a file store in the grid and click **Details**. To remove a file store, select file store with a status of **New** and click **Remove**. You can only remove file stores with a **New** status.

- To save the changes, click the **Apply** button.

Install the license

Complete the following steps to install a Barr EOM license.

- From the EOM Console navigation pane, select the **Administration** application.
- In the navigation pane, click **Manage License**. The **Manage License Utility** is displayed in the right panel.

Administration - Manage License

License key: License Wizard Customer: BARR SYSTEMS INC
Gainesville
FL

Serial number:

License Status: Activated, version (3.0.85.0)

Drag a column header here to group by that column

Description	Quantity	Expires	Licensed Behavior	Unlicensed Behavior
> Barr EOM	1	12/31/9999 11:59:59 PM	Enabled	Hidden
Network Folders (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
LPD (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
IP Socket (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
FTP (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
RJE (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
NJE (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
MQ Series (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
Email (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
Windows Queues (Outp...	1	12/31/9999 11:59:59 PM	Enabled	Hidden
Network Folder (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
LPR (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
IP Socket (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
FTP (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
RJE (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
NJE (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden

Refresh Cancel Apply Help

- Click **License Wizard**. The **License wizard** is displayed.
- On the **License Operation** dialog box, select **Install and activate a new license**. Click **Next**.

5. On the **License File Installation** dialog box, determine if you want to install the license automatically using an Internet connection or manually by selecting the license file.

- To install the license automatically, select the radio button next to **Install License Automatically**. An internet connection is required to install automatically. Enter the **License key** for this Barr EOM system and click **Next**.



During Barr EOM order processing an EOM license was created that matches the options ordered. The license key was sent in an email to the ordering customer. If you cannot locate your license key, contact Barr Systems Technical Support or Sales for assistance.

- To install the license manually, select the radio button next to **Install License Manually**. In the **License file** box, type the path and file name of your license file or click the Browse button to locate the file and select it. Click **Next**.
6. On the **License Confirmation** dialog box, confirm the license information is correct and click **Next**.



The **Next** button will not activate if the **Serial** and **Order** numbers do not match. The order number is the same number as the Barr invoice number.

7. On the **Activate License** dialog box, determine if you want to activate the software at this time.
 - To activate the software, see section 4.5 “Manage the Barr EOM license” for instructions.
 - To complete the installation without activating the license, select **Skip activation at this time**, click **Next**, and click **Finish**. You can activate the license at a later time using the **License wizard**.

2.3 Install on a failover cluster

Documentation coming soon

2.4 Upgrade to a newer version of Barr EOM

Follow these steps to upgrade your current Barr EOM installation to a newer version.



Before you begin: Verify that the users performing the upgrade have both Barr EOM and operating system Administrator rights on the systems that contain Barr EOM components: SQL Server, computers that have Barr EOM services, IIS folder, and the license file folder.

Notify anyone involved with document flow that Barr EOM will be down for an upgrade. Include people that manage any of the Barr EOM resources (printers, applications, and customers) and anyone that sends and receives documents using Barr EOM.

Remove the Barr EOM components

Complete the following steps to remove the Barr EOM components before upgrading.

1. Make sure all EOM processes have completed, including scheduled processes. Disable all sources to ensure no further input will occur.
2. Verify the location and status of the Barr EOM components in the **Manage Product Components Utility**:
 - a. Review the **Status** column to verify all EOM Consoles are closed. The Status column will display a red x for closed EOM Consoles and a green check for active EOM Consoles. Once an EOM Console has connected to the Barr EOM installation it will always be listed in the **Manage Product Components** grid.
 - b. Make a note of the following for each of the Barr EOM services: server name, domain, and credentials (the service log in account).
3. Close any active EOM Consoles.
4. At each server with a Barr EOM service listed in the **Manage Product Components Utility**, complete the following steps. If multiple machines are running Barr EOM services, you must complete these steps on each machine. Make sure you complete these steps for the server that has the Barr EOM DBM Service running last.
 - a. Open the **Barr EOM Server Configuration Utility**. (From the task bar, click Start | All Programs | Barr Systems | Barr EOM | **EOM Server Configuration**.)
 - b. From the **EOM services configuration** tab, in the **EOM DBM Configuration** grid, make note of the **SQL Server Instance** and the **Database Name**. This will be used later in the upgrade procedure.
 - c. Stop all of the Barr EOM services except for the Barr EOM DBM Service (unless this is the only server with Barr EOM services or it is the last server to have its services stopped). To stop the services, select the services in the grid and click **Stop Selected Service**. Wait for the **Status** column to display **Stopped** for all of the services. This indicates all of the EOM service components are stopped for the selected server.
 - d. Click **OK** to close the **Barr EOM Server Configuration Utility**.
 - e. Repeat this procedure for each server with a Barr EOM service, stopping the Barr EOM DBM service last.
5. The upgrade process will save a backup of the database before upgrading. The backup is located on the server with Microsoft SQL Server in the \\Program Files\\Microsoft SQL Server\\MSSQL.1\\MSSQL\\Backup folder. You can open SQL Server Management Studio to view the backup database.

6. Remove the Barr EOM components using the following steps.



If you uninstall Barr EOM while another user is running it, the program might not uninstall completely. Verify all sessions connected to the server have stopped the Barr EOM components. You can use the Terminal Service manager on the server operating systems to review the processes running per session.

- a. Open Control Panel | **Add or Remove Programs** (or **Programs and Features** in Windows Vista).
- b. From the program list, select **Barr EOM Console** and click **Remove**. The Uninstall program will close any open programs. Any unsaved data will be lost.
- c. From the confirmation dialog box, click **Yes** to continue (or **No** to cancel). Wait for the uninstall to complete.
- d. Repeat these steps for **Barr EOM Database Scripts** and **Barr EOM Services**.

Install the new version

Follow these steps to install the Barr EOM software. The setup program copies files from the Barr EOM CD to your computer. Before you run the setup program, exit all Windows programs.

1. Insert the Barr EOM CD into the CD-ROM drive. The Barr EOM Setup program automatically displays. If auto run is disabled on your system or if the setup program does not automatically display, right-click **Start** on the taskbar and select **Explore**. Navigate to the CD-ROM drive and double-click **Autorun.exe**. The Barr EOM Install window appears. Notice, as you move the pointer over the links, text appears describing the purpose of each link.
2. Verify all software prerequisites are installed. If the prerequisites are not met, red text will display below the link stating **Software prerequisites are not met**. If the red text is shown, click **Check and Install Prerequisites**. The window that displays lists all of the software prerequisites along with their installation status. Next to each item that is not installed, an **Install Now** button displays. Click the **Install Now** button for each item and follow the steps to install the appropriate software. Once everything is installed, click **Back**.

To install the database

1. Click **Set up Barr EOM Database**.
2. Click **Set up EOM Database**. The Barr EOM Database Scripts are automatically installed. The **EOM Database Installer** dialog will appear.
3. In the **Database to upgrade** list, select the database that was used in production.
4. To upgrade the database, leave the **New database name** box blank. If you want to clone the database (create a copy of the database and only upgrade the copy), enter the name of the new database in the **New database name** box. The database selected to upgrade will remain at the old Barr EOM version.
5. Click **Run**. Review the confirmation messages that display and click Yes to continue.

6. A successful message will display when complete, click **OK**.
7. Click **Back**.

To install the services

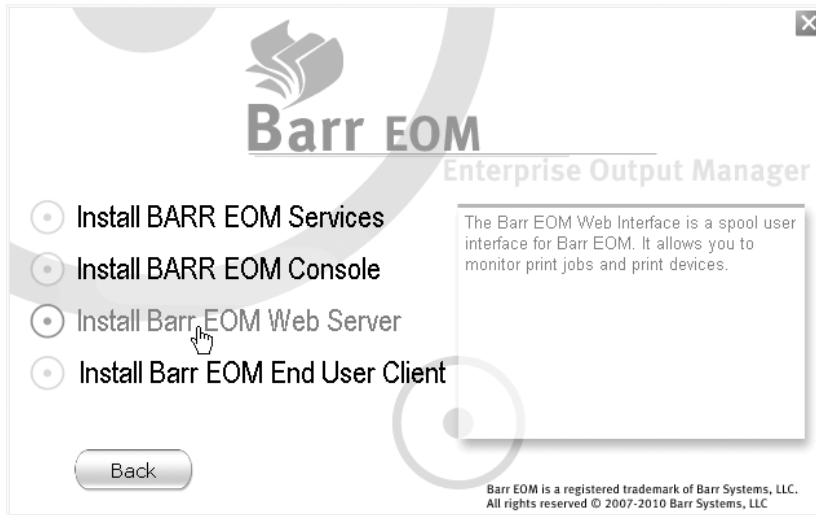
1. Click **Install BARR EOM**.
2. Click **Install BARR EOM Services**. The **Barr EOM Services** wizard displays.
3. Read the information on the **Welcome** dialog box, and then click **Next**.
4. Review the license agreement, and then click **Yes**. (To install the software, you must accept the terms of the license agreement.)
5. On the **User Information** dialog box, enter the appropriate contact information, and click **Next**. This information is required.
6. Determine the type of service install you want, **Complete** (all services will be installed) or **Custom** (you can choose the services to install). A custom installation is useful if a system will only have the Barr EOM Input Service or the Barr EOM Output Service installed.
 - To do a **Complete** install and install all services, select **Complete** and click **Next**.
 - To do a **Custom** install and choose the services you want to install, select **Custom** and click **Next**.
 - Specify where to install the service software.
 - For each service you do not want to be installed, click the drop-down before the service name and select **This feature will not be available**. Once you have configured each service to be installed or not installed, click **Next**.
7. Click **Install** and wait for the installation to complete. Click **Finish**.

To install the EOM Console

1. Click **Install BARR EOM Console**. The **Barr EOM Console** wizard displays.
2. Read the information on the **Welcome** dialog box, and then click **Next**.
3. Review the license agreement, and then click **Yes**. (To install the software, you must accept the terms of the license agreement.)
4. On the **Destination Folder** dialog box, verify the path where the EOM Console will be installed. Click **Next**.
5. Click **Install** and wait for the installation to complete. Click **Finish**.
6. Click **Back**.

To install the EOM Web Server

1. Click **Install BARR EOM Web Server**.



2. From the **Barr EOM Web Server** wizard, read the information on the **Welcome** dialog box, and then click **Next**.
3. Select the folder where the EOM Web Server will be installed. The default folder is C:\inetpub\wwwroot\comweb. To choose a different folder, click **Change** and select the appropriate folder. Click **Next**.
4. Click **Install** and wait for the installation to complete. Click **Finish**.
5. In Windows Explorer, open the folder where the Web Server was installed. If you used the default location, open the **C:\inetpub\wwwroot\comweb** folder.
6. Open the **web.config** file. At the bottom of the file, replace the **PRIMARY_DBMHOST** entry with the name of the machine you are using.
7. Save and close the file.

To configure Barr EOM

1. On the first installation window, click **Configure EOM**. The **Barr EOM Server Configuration Utility** displays.
2. On the **EOM services configuration** tab, select all of the boxes in the **EOM DBM Configuration** and the **EOM Service Configuration** grids. The **EOM DBM Configuration** grid only appears if the system has the Barr EOM DBM Service installed. Only the installed Barr EOM services will display in the **EOM Service Configuration** grid.
3. Verify the **SQL Server Instance** and **Database Name** cells have the same information as selected in the **EOM Database Installer** dialog box.

4. Verify the **EOM DBM Host Name** cell value is correct. The **EOM DBM Host Name** is the computer where the Barr EOM DBM Service is installed. To change the value, click in any of the cells in the **EOM DBM Host Name** column and click the Browse button. From the **Browse For Computer** dialog box, select the computer where your Barr EOM DBM service is running. You will need to select the **Domain** and **Computer**. When complete, click **OK**. Notice all of the cells in the column are populated.
5. Verify the **Service Logon Credentials** cell value is correct. To change the value, click in any of the cells in the **Service Logon Credentials** column and click the Browse button. From the **Select User** dialog box, choose how the service will log on. You can decide if it will log on as a local system account or you can enter a specific account. Use **Local System Account** if the DBM will communicate with the local SQL database, local EOM services, and local file resources. All other cases use a Windows Service account for the log on. In most cases, you will choose **This account** and select the service logon account that was created during the Prepare the network installation steps. Selecting an account will require you to complete the password boxes. When complete, click **OK**. Notice all of the cells in the column are populated.
6. Click **Apply**.
7. Verify all of the items are selected and click **Start Selected Service**. Notice the status column changes to Running for all services.
8. Select the **EOM security administration** tab. Notice all fields are populated with the previous selections.
9. Verify the **SQL Server\Instance** and the **Database** fields are set to the same as configured on the **EOM services configuration** tab.
10. In the **Authentication** list, choose the authentication type, Windows or SQL. If you choose **Windows Authentication**, click **Connect**. The **Users and Groups** grid will display the Windows users and groups configured using this tab in the previous version of Barr EOM. These users will have full administrative rights to EOM Console.
11. Click **OK**.
12. Click the Exit button to close the auto run. The software installation is complete.

Once the first installation is complete, continue installing components on various servers. After the first Barr EOM DBM Service is configured and started, any other services that will communicate through that DBM can be configured and started. If additional DBM services were installed, you can repeat this procedure for each service. The database only needs to be upgraded/cloned one time. All of the DBMs will point to the one database.

Verify the upgrade

Complete these steps to verify the upgrade completed successfully.

1. Open an EOM Console connecting to the Barr EOM DBM system using a EOM System Administrator user account.
2. On the menu bar, verify the service status lights are all green.
3. Verify the information in the status bar is correct and the **Connection Status** is **Connected**.
4. On the menu bar, select Help | **About**. Verify the version and serial numbers are correct.
5. Verify the Destinations, Sources, Documents, and Library trees are the same as before the upgrade.
6. In the navigation pane click **Administration** and verify the utilities show the correct information.
7. On the menu bar, select Tools | **Message Console**. From the Message Console, review the messages and address any errors that may have appeared since the **Started EOM SNMP Service** message.
8. Activate the installed EOM license to operate with the new version on EOM.
9. Verify the Valid EOM license, serial number: message is listed without error. Close Message Console.
10. Test some of the high priority or high volume document flows with users before announcing the Barr EOM system is ready for use.

2.5 Remove Barr EOM

Complete the following steps to remove the Barr EOM components that were installed by the setup program.

1. If you do not intend to reinstall the software, make note of the EOM file store for cleanup later in the uninstall process. (Open a source configuration and select the **More settings** tab. For the **Set file store** option, click the down arrow and note the file store paths.)
2. Make sure that all EOM processes have completed, including scheduled processes. Disable all sources to ensure no further input will occur.
3. Close all Barr EOM programs and utilities.

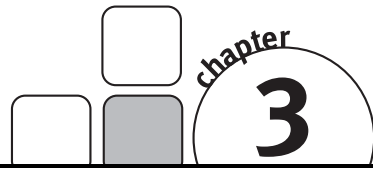
4. Stop all Barr EOM services from the **EOM Server Configuration** utility.
 - a. From the task bar, click Start | All Programs | Barr Systems | Barr EOM | **EOM Server Configuration**.
 - b. From the **EOM services configuration** tab, select all of the services and click **Stop Selected Service**. Wait for the **Status** column to display **Stopped** for all of the services. This indicates all of the EOM service components are stopped for the selected server.
 - c. If other machines are running EOM services, you must complete these steps on each machine. Make sure you complete these steps for the server that has the DBM service running last.
5. Open Control Panel | **Add or Remove Programs** (or **Programs and Features** in Windows Vista).
6. From the program list, select **Barr EOM Console** and click **Remove**. The Uninstall program will close any open programs. Any unsaved data will be lost.
7. From the confirmation dialog box, click **Yes** to continue (or **No** to cancel). Wait for the uninstall to complete.
8. Repeat steps 6 through 8 for each of the remaining Barr EOM programs listed in the **Add or Remove Programs** utility.

The Uninstall program does not remove information created during Barr EOM configuration and operation. If you intend to reinstall the software, keep these items. To completely remove the program, complete the following steps.

1. Delete the **\\Program Files\Barr Systems** folder.
2. Delete each of the EOM file store folders noted above.
3. Delete the **\\Documents and Settings\UserName\Application Data\Barr Systems, LLC** folder. This folder must be deleted for each user login that has accessed the EOM Console and the **All Users** folder. Make sure you perform this step from each computer that has accessed EOM Console (for each login).
4. Delete the Barr EOM database.
 - a. Delete the EOM database from the Microsoft SQL Server Management Studio.
 - b. In the **\\Program Files (x86)\Microsoft SQL Server\MSSQL.1\MSSQL\DATA** folder, delete the following files:
database name_datetimestamp.mdf
database name_datetimestamp_Log.ldf
5. Delete any old ports.
 - a. Open Control Panel | **Printers and Faxes**.
 - b. On the menu bar, select File | **Server Properties**.
 - c. From the **Ports** tab, select any port that is no longer needed and click **Delete Port**.

Notes:

Configure and Use the Software



Once you have completed the installation steps in Chapter 2, you are ready to configure and use Barr EOM. The following sections provide details about the Barr EOM concepts and the features of the EOM Console. Instructions are provided for working with destinations, sources, documents, rules, and administrative options. Complete the steps in the following sections to configure and use the software.

3.1 Barr EOM concepts

Barr EOM is a complex application with numerous features targeted at increased efficiency in managing output. This section covers the core concepts of the system.

Sources

Documents are received into Barr EOM using sources. These sources can be created, configured, and monitored by administrators using the EOM Console. Sources can be organized into source groups, which makes monitoring easier from the EOM Console. Table 3-1 lists the source types supported by Barr EOM.

TABLE 3-1
Source Types

Email	RJE
Other EOMs	Socket
FTP	Web upload
LPD	WebPrint
Network folders	WebSphere MQ
NJE	Windows queues
Print/Channel	

Destinations

Documents are sent from Barr EOM to destinations. These destinations can be printers or other devices, as shown in Table 3-2. Destinations can be created, configured, and monitored by administrators using the EOM Console.

Destinations can be organized into destination groups, which makes monitoring easier from the EOM Console. These destination groups also play an important role in configuring functions such as Failover Printing, Load Balancing, Print Splitting, and ReleaseAnywhere.

TABLE 3-2
Destination Types

Email	NJE
Other EOMs	Print390
Fiery device	PRISMAProduction
FTP	RJE
IPDS	SharePoint
IPP	Socket
LPR	WebSphere MQ
Network folder	Windows queue

Printer families

The concept of printer families is used in Barr EOM to configure commands for print languages and map them to destinations based on their capabilities.

SNMP devices

Modern printers can provide information about their statuses and capabilities using SNMP. Barr EOM uses SNMP to both discover and monitor printers. Once discovered, administrators can create destinations associated with these physical devices.

Documents

The main purpose of Barr EOM is to manage the flow of documents. The concept of the document is therefore present in virtually all areas of the product.

Document properties

Every document in Barr EOM has metadata associated with it. This metadata can range from obvious items, such as document name and type, to finishing options, such as stapling and binding. All of these items are called document properties. Some of the properties are editable, while others are shown only for informational and reporting purposes. When setting up Barr EOM, administrators configure which document properties are active, the display names of active document properties, and the default initial values of these properties.

Active documents

Documents coming into Barr EOM are considered Active, until they are either printed or deleted.

Retained documents

Once a document is printed or deleted, it is retained. Retained documents can be easily restored to the Active status from one of the various user interfaces. There are global and document-specific settings that govern whether a document is retained or not.

Archived documents

There are limits to the number of document that can be retained and the length of time that a document can stay in Retain. If there is a need to keep a document beyond that length of time, then the document is moved to the Barr EOM Archive.

Document folders

Documents can be organized into document folders. These folders govern the security rights that users and user groups have over documents.

Document queries

Document queries are used to quickly locate documents based on their properties. Queries can be run for a specific immediate purpose or saved for future use.

Routing of documents

There are three ways to route documents from a source to a destination:

- Include a default destination in the source configuration.
- Create a business rule to route to a destination.
- Manually route the document from one of the Barr EOM user interfaces.

Document transformations

Barr EOM supports a variety of document types, such as PCL, PS, PDF, Text, TIFF, JPG, PGN, AFP, IPDS, and LCDS. The system also supports the transformation of documents between these print description languages (PDLs).

Document reengineering

Sometimes it is useful to be able to add or remove information from documents without making changes to the application that generates the document. Examples include adding bar codes, OMR marks, logos, and so on. Similarly, bundling and splitting of documents is sometimes desired. Barr EOM includes broad support for all these actions.

Output processes

Barr EOM includes the powerful concept of output processes. These processes can be associated with either destinations or documents. They represent a predefined set of actions that would affect a document as it is being sent to a destination. Examples include search and replace, setting finishing options, editing PJJL commands, and inserting overlays.

The Process Designer is a utility included in the EOM Console that is used by administrators to design output processes. The visual flowchart-style designer makes it easy and intuitive to create complex, powerful processes.

File stores

The architecture of Barr EOM includes a database that stores only document properties. The actual files are stored in network folders, called file stores. Administrators can define multiple file stores, and configure which documents go into which file stores.

Security

Security control is a central component of Barr EOM. Granular rights can be assigned to users and user groups for every major area of the system: destinations, sources, documents, administration, and user interfaces. These rights control both visibility and which actions can be performed. The use of inheritance throughout the product greatly simplifies the process of setting up security.

Failover profiles

In an ideal world, destinations are always ready to receive documents. In the real world, printers or other devices are sometimes inaccessible. Barr EOM includes failover profiles, which allow administrators to specify what should happen to documents in such cases. Included in the failover profiles is the ability to pick alternate destinations to which the documents can be routed.

Business rules

Barr EOM is designed to operate unattended. It is a system geared towards automation of document processes. Business rules represent the main interface for managing and configuring these automatic processes. Administrators can create rules which include conditions and actions. Conditions must be true for the rule to affect the document. Actions affect documents in a variety of ways. Examples include routing to destinations, transforming to other print languages, assigning to document folders, and editing document properties.

Alert rules

Administrators can use alert rules to configure advanced alert options for certain events. Alert rules are particularly useful for monitoring printer states. Through alert rules, support personnel can be proactively informed when printers have conditions that could prevent end user printing.

Billing accounts

Barr EOM offers complete flexibility in configuring billing accounts. These accounts can be associated with documents. The association can occur automatically based on document properties, or manually based on input from users. Reports can then present a complete picture of total print output by billing account.

Costing

Barr EOM sources and destinations can have per page costs associated with them. A cost can be assigned to every document coming in and going out of Barr EOM. This cost can be based on basic document properties such as color versus black and white, or more advanced properties such as media type and finishing options.

Quota management profiles

Reporting, costing, and billing accounts can provide a complete picture of printing costs. Quota management profiles can actually modify user behavior. These profiles can be configured to set up restrictions based on the type of document. Examples include disallowing color printing, requiring documents to be duplex, and disabling print from certain applications.

User balances

In addition to quota management profiles, users can be assigned balances. For example, all users in a particular department could be assigned a \$50 print allowance for the month. Once reached, any print from the respective users is disallowed. Administrators have full control over setting up balance amounts and refresh periods.

Messages

Barr EOM posts messages whenever an event takes place. These messages are viewable using the Message Console included in the EOM Console. Administrators can monitor messages in order to ensure trouble-free operation of the system.

3.2 Learn about EOM Console

The EOM Console is the main window for Barr EOM. It is primarily used to manage the flow of documents in Barr EOM. Access is available to all active, retained, and archived documents. You can also manage and monitor sources (how documents are received into Barr EOM) and destinations (where documents can be sent). Administrators can use the EOM Console to configure administrative settings such as permissions, billings accounts, and default display settings. Granular security controls support varied access to features, depending on the permissions assigned to the logged-in user.

Open and close EOM Console

To open and close the utility, use one of the following methods.

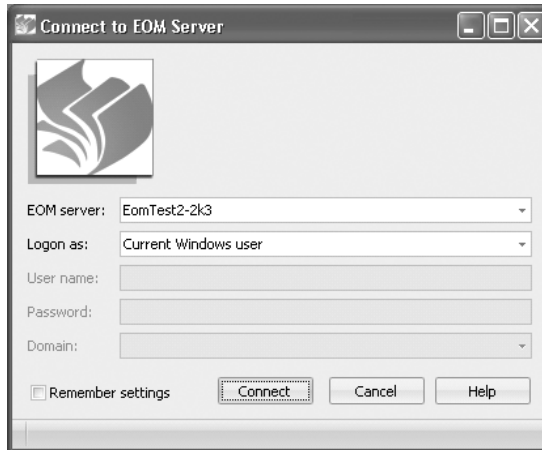
To open the utility



To open the EOM Console, your user name must have been configured during EOM installation or an administrator must have given you the appropriate EOM Console permissions. Note that the user name is the operating-system logon user name. To open EOM Console using a different user name you must right-click the EOM icon and select **Run as** or **Run as Administrator**, depending on your operating system.

1. Open the EOM Console using one of the following methods:
 - From the taskbar, click Start | All Programs | Barr Systems | Barr EOM | **EOM Console**.
 - Double-click the **EOM Console** icon copied to your desktop during installation.

2. Before you can access the EOM Console window, you must connect to an EOM server. Complete the following steps from the **Connect to EOM Server** dialog box.



- a. In the **EOM server** field, enter the name of the EOM server where the BARR EOM DBM Service is started. If you have previously connected to a server, you can select that server from the drop-down list.
- b. From the **Logon using** drop-down box, select the type of user you log on as. You can log on as the **Current Windows user**, an **EOM user**, or an **LDAP user**. If you choose to log on as an EOM or LDAP user, you must complete the **User name** and **Password** fields.
- c. Select the **Remember settings** check box.
- d. Click **Connect**. You will be connected to the selected server and the EOM Console will open. The EOM Console title bar will display the name of the connected server.

To close the utility

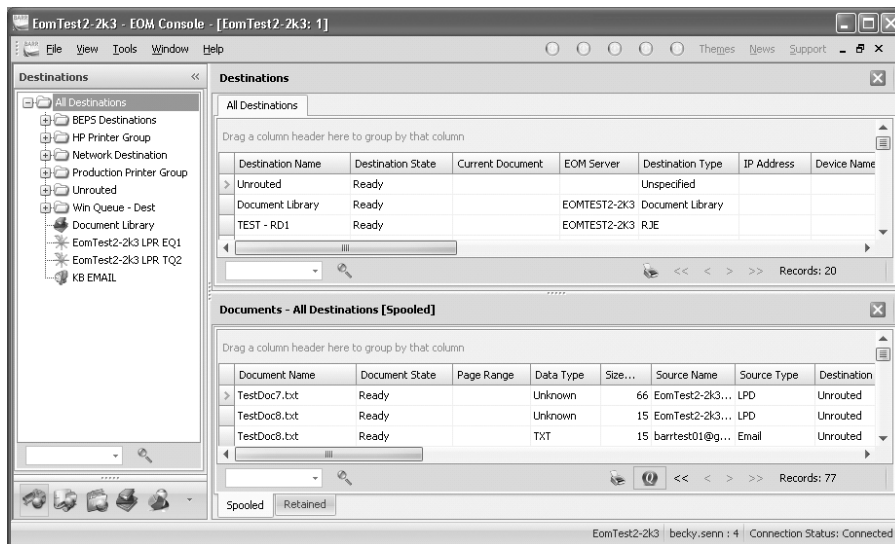
- On the menu bar, select File | **Exit**.
- Click the **Close** button on the title bar.



Barr EOM continues to operate in the background after you exit from the EOM Console. To stop Barr EOM operation, you must stop the Barr EOM services. Make sure to stop the Barr EOM DBM Service last.

Learn about the window

Use this section to learn more about the features of the EOM Console window. Descriptions are provided for the menu bar and status bar options.



Menu bar

The menu bar is displayed below the title bar. Click the following menus to learn about the available commands.

File menu

Option	Explanation
New	Window – Opens the current Barr EOM connection in a new window. This window will open inside the current EOM Console. The title bar of the first window will be <i>DBM server name: 1</i>. Successive opened windows are numbered accordingly. For example, you could use the first window for the Source application and the second for the Destination application. Note that, when multiple console windows are opened within a single EOM Console, all windows are connected to the same BARR EOM DBM Service using the same user name. To have an EOM Console with a different user name you must open another EOM Console. Connection – Displays the Connect to EOM Server dialog box for starting a new Barr EOM connection. Your existing connections will remain connected.
Close	Closes any of the open connections. Choose the number that corresponds with the connection you want to close.
Exit	Closes the EOM Console. When you exit, you are prompted to save any layout changes. Barr EOM continues to operate in the background after you exit from the EOM Console. To stop Barr EOM operation, you must stop the Barr EOM services. Be sure to stop the Barr EOM DBM Service last.

View menu

Option	Explanation
Dest – Sources Window	Shows or hides the Destinations or Sources window, depending on the active application.
Documents Window	Shows or hides the Documents window.

Tools menu

Option	Explanation
AdHoc Rules	Allows administrators to create and manage merging and packaging actions. Displays the Alert Rules Manager dialog box.
Alert Rules	Allows administrators to configure advanced alert options for certain events. This option is particularly useful for monitoring destination states. It displays the Alert Rules Manager dialog box.
Business Rules	Allows administrators to configure automated document processes. Administrators can create rules with conditions and actions that affect documents. Examples include routing to destinations, transforming to other print languages, assigning to document folders, and editing document properties. This option displays the Business Rules Manager dialog box.
Process Designer	Allows administrators to configure output processes. Output processes contain a predefined set of actions that affect a document as it is being sent to a destination. Examples include search and replace, setting finishing options, editing PjL commands, inserting overlays, and so on. Output processes can be associated with a destination or a document. This option displays the Process Designer dialog box.
Resource Manager	Provides a central way for managing all of the Barr EOM resources. Resources are used in business rule and output process actions. This option displays the Resource Manager dialog box.
Schedule Manager	Configures a recurring schedule for a task. Tasks can be created to run an ad hoc rule, create and save a report, or create and email a report.
Device Wizard	Allows administrators to convert Windows queues to Barr EOM sources, detect devices using SNMP, and restore previously converted Windows queues
Console Security	Allows administrators to assign permissions to users and user groups for every major area of the system: Destinations, Sources, Documents, and Administration. These rights control both visibility and which actions can be performed. Displays the Security Configuration dialog box.
Security Roles	Allows administrators to define and modify the security roles of users and groups. The Role Manager utility consists of different types of roles and corresponding security-related permissions that can be granted or denied to each role.

Option	Explanation
Message Console	Opens the Message Console window, which provides a real-time log of all Barr EOM activity.
Audit Console	Opens the Audit Console, which displays detailed information on user actions.
Configure Viewer	Opens the Viewer Configuration dialog box.
Console Options	Check News – Enables or disables the News and Support options in the menu bar. These options connect you to the Internet for viewing up-to-date news or support information related to your Barr EOM serial number.
Desktop Client Installation	documentation coming soon

Window menu

Option	Explanation
Alignment	Vertical – Displays all of the open connections vertically, so they can be viewed at the same time. Horizontal – Displays all of the open connections horizontally, so they can be viewed at the same time. Cascade – Displays a cascading view of all open connections.
1, 2, 3...	Provides a way to easily switch between all open connections. Choose the number that corresponds with the connection you want to view.

Help menu

Option	Explanation
Barr EOM Help	Displays the Barr EOM Help window. The Help window incorporates contents, index, search, favorites, and glossary tabs to make it easy for you to find answers to your questions. For more information about using Help features, see Chapter 5.
About EOM Console	Displays program information, version number, and copyright.

The following options are also available on the menu bar:

Option	Explanation
Themes	Allows you to change the EOM design/color scheme to one of the available themes.
News	Displays up-to-date news information related to your Barr EOM serial number. Clicking this option will connect you to the Internet using your default Internet connection, if you are not already connected. On the Barr Central log in page, login to view the latest news information.
Support	Displays up-to-date support information related to your Barr EOM serial number. Clicking this option will connect you to the Internet using your default Internet connection, if you are not already connected. On the Barr Central log in page, login to view the latest support information.

Service status lights

The service status lights display to the right of the menu bar. The lights indicate the status of each monitored service type. Move the pointer over a light to identify its service type and status. You can choose which services influence the status lights in the Manage Product Components Utility. See the “Manage product components” section for more information.

Application window

The EOM Console consists of a navigation pane and a console window. The navigation pane is displayed along the left side of the window, providing quick access to the Destinations, Sources, Documents, Library, Reports, and Administration applications. You can easily switch between applications by clicking the application buttons at the bottom of the pane. The information that is displayed in the navigation pane and the console window are different depending on the application you select.

You can customize the navigation pane to see more or fewer buttons, add or remove buttons, or gain more space to display items in the pane. You can customize the console window display by configuring the grid views (see Section 3.4, “Configure EOM Console grid views”) and showing and hiding the grids from the **View** menu. If two grids are displayed, you can also adjust the height of the grids by dragging the bar that separates the grids. Your navigation pane and console window settings will be remembered for each application.

Searching is also provided in navigation pane tree views and console window grid views. If a tree view is displayed in the navigation pane, you can search the tree using the controls in the search panel below the tree. For grid views, you can use the controls in the search panel below the grid.

Each grid view can display a maximum of 5000 records. If more than 5000 records exist, you can use navigation buttons below the grid to page through the records. You can choose to view the first page, previous page, next page, or last page.

Review the following sections for more specific information about each application.

- Destinations application (Section 3.5)
- Sources application (Section 3.6)
- Documents application (Section 3.7)
- Library application (Section 3.7)
- Reports application (Section 3.8)
- Devices application (Section 3.9)
- Administration application (Section 4.1)

Status bar

The status bar displays the following information:

- **EOM server** – The name of the current EOM server connection. If you have multiple connections open, the status bar is updated to show the current connection as you switch between windows.
- **User name** – The logged-in user name.
- **Connection status** – The status of the connection to the Barr EOM DBM Service.

3.3 Perform initial administrative setup

Before you begin working with Barr EOM, use the following procedures to configure and set up Barr EOM. After the software is installed, an administrator should configure the EOM security roles, set up the EOM Console security, detect printers, and configure SNMP monitoring. The following sections provide step-by-step instructions for performing the initial Barr EOM administrative setup.

Manage EOM security roles

Administrators can use **Role Manager** to define and modify the security roles of users and groups. The **Role Manager** utility consists of different types of roles and corresponding security-related permissions that can be granted or denied to each role. There are three roles defined in Barr EOM:

- **EOM Document Owner** – Defines the rights, or permissions, of document owners. You can limit or extend the permissions of document owners as appropriate. For example, an administrator who wants to prohibit document owners from assigning documents to destinations would remove this permission. This role is limited to Document and Library applications.
- **EOM System Administrators** – Defines the members and permissions for system administrators. System administrators can configure and manage all of the security permissions. As with the Document Owner role, you can limit or extend the permissions of system administrators as needed. By default, all permissions are granted to the System Administrators role at the time of installation; you can modify permissions as appropriate for the installation. A company might have several system administrators. This role defines permissions for all applications, that is, Destinations, Sources, Documents, Library, Reports, and Administration.
- **EOM Security Administrators** – Is identical to the role of System Administrator except that a subset of permissions is always unavailable for modification; this safeguard insures that an installation does not accidentally lock itself out of Barr EOM, preventing the configuration of security permissions. A company typically would have only one Security Administrator.



These permissions are set for the role and cannot vary for users or groups within a role.

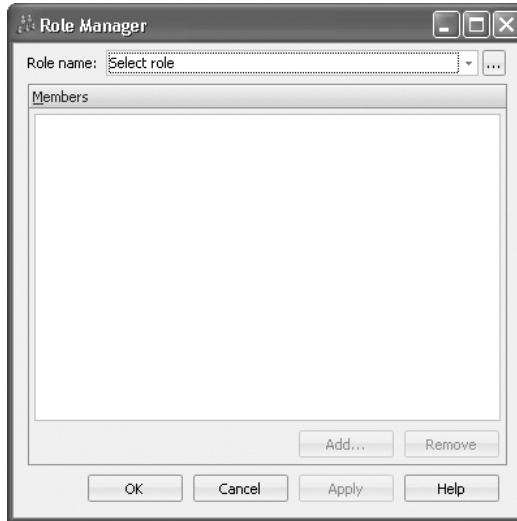
You can add and remove users and groups from the System Administrator and Security Administrator roles as needed to manage security access; for example, you might want add a system administrator to serve as backup to an established system administrator.



Permissions can also be set through the Destination, Source, Document, Library, and Reports applications, and for the EOM Console.

Complete the following steps to assign users and groups to a security role and adjust the permissions for a role.

1. From the EOM Console menu bar, select Tools | **Security Roles**. The **Role Manager** dialog box is displayed.



2. To add users or groups to a role, complete the following steps.
 - a. In the **Role name** box, select the role to which you want to add a member.

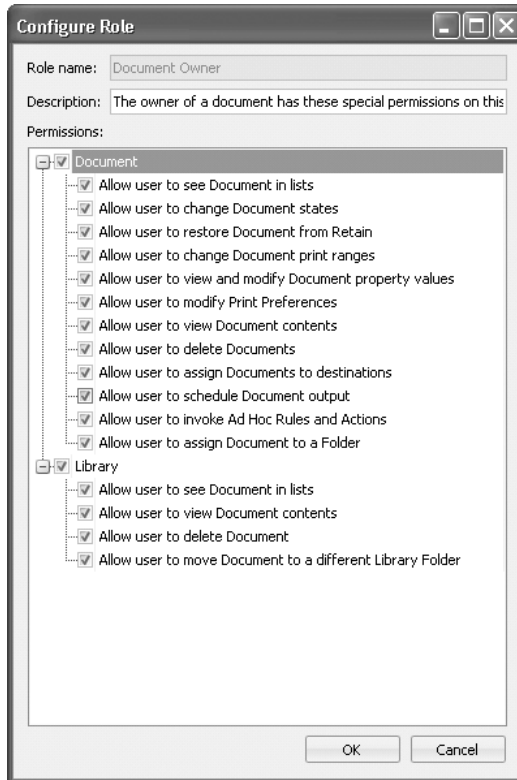


Because a document can have only one owner, you cannot add members to the Document Owner role.

- b. Click **Add**. The **User and Group Selection** dialog box is displayed.
 - c. From the grid, select the users or groups that you want to add and click **OK**.
If a user or group is not listed, click **More Users** to locate the user. From the **More Users** list, you can choose to add EOM users, LDAP users, or Windows users and groups. You can also choose to import LDAP users and groups. See the “Add users and groups to Barr EOM” section for detailed procedures on adding users. When you are finished, click **OK**.

The selected users are now listed in the **Role Manager** dialog box.

3. To modify the security permissions of a role, complete the following steps.
 - a. Next to the **Role name** box, click the Browse (...) button. The **Manage Roles** dialog box is displayed.
 - b. Select the role you want to modify and click **Modify**. The **Configure Role** dialog box is displayed. This dialog box lists, in tree form, all the security permissions for the selected role.



- c. Modify permissions by selecting or clearing check boxes. When you are finished, click **OK**.



In the list of permissions for the Security Administrator role, a subset of permissions is unavailable for modification so that security can always be configured.

- d. Click **Close**.
4. Click **OK**.

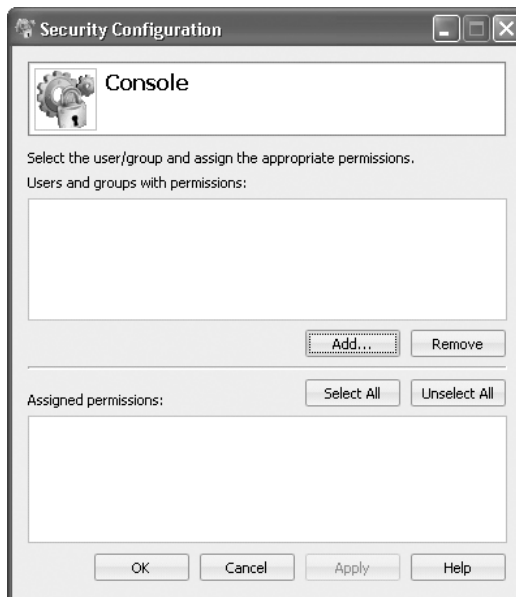
Configure EOM Console security

The **Security Configuration** dialog box is used to assign permissions to individual users or groups of users. Permissions authorize a user or group to perform actions within specified areas of Barr EOM. Without the appropriate permissions, attempts to carry out those actions are blocked.

To configure security for the EOM Console, you must be assigned the **Allow user to Configure Console Security** permission or be added to the security during the Barr EOM installation. Users added to the security during installation are considered administrators and are assigned all permissions by default.

Complete the following steps to assign permissions for the EOM Console.

1. From the EOM Console menu bar, select Tools | **Console Security**. The **Security Configuration** dialog box is displayed.



2. From the **Users and groups with permissions** list box, select the appropriate user or group in the list. The **Assigned permissions** list box will display the assigned permissions for the selected user.

If you want to set permissions for a user or group that does not appear in the list, click **Add**. From the **User and Group Selection** dialog box, select the users or groups that you want to add and click **OK**. If the user or group is not listed, click **More Users** to locate the user. From the drop-down list you can choose to add EOM users, LDAP users, or Windows users. You can also choose to import LDAP users. See the "Add users and groups to Barr EOM" section for detailed procedures on adding users. Once users are added, they are placed in the EOM database, which ensures that they are always listed in the future.

3. From the **Assigned permissions** box, select or clear the appropriate permissions. Click **Select All** or **Unselect All** to easily assign or remove all permissions.



To assign initial permissions so that users can open the EOM Console and view the Destinations, Sources, Documents, Library, and Reports applications, select the **Allow user to run the EOM Console**, **Allow user to access the Destinations Application**, **Allow user to access the Sources Application**, **Allow user to access the Documents Application**, **Allow user to access the Library Application**, and **Allow user to access the Reports Application**, permissions. For information about assigning security for Destinations, Sources, Documents, Library, and Reports see the appropriate manual section.

4. Once all of your permission changes are complete, click **OK**.

Detect printers

Complete the following steps to detect printers using SNMP. Printers can be detected on all servers that have the Barr EOM SNMP Service installed. Once printers are detected, they can then be configured as Barr EOM destinations.

1. From the EOM Console menu bar, select Tools | **Device Wizard**. The **Device Wizard** displays.



2. Select **Detect devices via SNMP** and click **Next**.
3. On the **SNMP Services** page, select the check boxes for the servers you want to run SNMP detection. The grid lists all of the servers with the Barr EOM SNMP Service installed.
4. In the **SNMP Detection Method** column, choose the detection method, either **Broadcast** or **IP Range(s)**. If you select **IP Range(s)**, click the **IP Range(s)** cell. Enter the **Start** IP address and the **End** IP address and click **Add**. You can enter additional IP ranges as needed. Click **OK** when finished.
5. Click **Detect**. The SNMP detection will begin.

6. Once the detection is complete, complete the following steps on the **SNMP Detection** page to convert SNMP devices into EOM destinations. You can change the view of the grid to show only the newly detected devices or show all devices.
 - a. In the grid, select the devices you want to be created into EOM destinations.
 - b. In the **Destination Type** column, select the destination type you want to create. You can create fiery device, IPP, LPR, or socket destinations.
 - c. In the **Destination Group** column, select where the EOM destination will be grouped.
 - d. In the **Destination Server** column, select the appropriate **Server**.
 - e. Review the information in the remaining columns and update them as necessary.
 - f. Click **Next**.
 - g. On the **Confirmation of Action** page, click **Continue** to create the destinations. The **Device Wizard Log** displays. You can save the log file by clicking **Save**.
7. Click **Finish**.
8. To add destinations for additional servers, repeat these steps.

Manage SNMP devices

You can use the Manage SNMP Utility to configure SNMP monitoring and SNMP devices. You can determine how frequently the Barr EOM SNMP Service will update EOM destinations that are auto-detected SNMP printers. You can also add detected devices as Barr EOM destinations.

See Section 4.7, “Manage SNMP devices” for procedures on configuring SNMP monitoring and SNMP devices.

3.4 Customize grid views

You can customize the grid view by sorting, grouping by columns, and filtering by values. These actions are useful when you are trying to quickly find items in the grids. You can also add and remove columns and change the order in which the columns display. Your grid display choices can then be saved to a layout file.

Sort columns

You can sort data by an unlimited number of columns. When sorting is applied to the view, the records are rearranged to meet the current sort settings.

- To sort by a column’s values and replace any existing sort conditions applied to the current column or other columns, click the column’s header. An Up or Down Arrow icon is displayed in the header to indicate ascending and descending sort orders respectively.
- To sort by a column’s values and preserve existing sort conditions, use one of the following methods:

- Click the column header while pressing the SHIFT key.
- Right-click a column header and select **Sort Ascending** or **Sort Descending**.

Group by columns

You can group data by the values of one or more columns. If you group the data in the grid by a single column, records that have identical values in the same column are arranged into corresponding data groups. Each data group is identified by an expandable group row. If you then group the data by another column, the data rows within each group are combined into second level groups according to the new grouping column's values.

To group by a specific column

Use one of the following methods to group by a specific column.

- Click the column header you want to group. Use a drag-and-drop operation to place the column in the group panel above the grid.
- Right-click the column header and select **Group By This Column**.

To remove grouping

Use one of the following methods to remove grouping.

- Click the column header you want to remove from grouping. Use a drag-and-drop operation to place the column header back in the column header panel.
- Right-click the grouping column's header and select **UnGroup**.
- To remove all grouping, right-click the group panel and select **Clear Grouping**.

To change group order

Click the column header you want to move. Use a drag-and-drop operation to move the column header to another position within the group panel.

Filter on values

You can customize the grid views by filtering on values. Filters are used to view only the items that meet conditions you specify. When filtering is applied, the records displayed are restricted to those that meet the current filter criteria. For example in the Documents grid, if you filter the Class column on value A, only documents with a class value of A will display. All of the other documents still exist and can be seen again by removing the filter. You can apply filters to single or multiple columns.

To create a simple filter condition

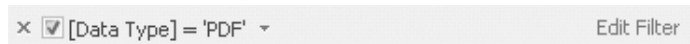
Complete the following steps to select records that contain a specific value in a specific column.

1. Hover over the column header you want to filter. Click the filter image that is displayed in the column header. The filter drop-down menu will display a listing of all of the available values in the column.

	Document Name	Document State	Data Type	Size, In Bytes
	Monthly Cable a...	Hold	Undefined	Custom) 5600
	Barr Enterprise P...	Hold	PDF	(Blanks) 5772
	BarrSyncMFST.txt	Hold	TXT	(Non blanks) 260
>	boot.ini	Hold	Undefined	PDF 296
	Copy (11) of Dat...	Hold	PDF	TXT 1570
	Copy (11) of Dat...	Hold	PDF	Undefined 71570

2. Select a filter value in the menu. The menu will automatically close. The grid now displays only the records that contain the specified value in the specified column. All of the other records are hidden from the view, but can be restored by removing the filter.

Notice that a filter panel is displayed at the bottom of the grid showing the current filter criteria. You can remove the filter by clicking the close (x) button on the panel. You can enable or disable the filter using the check box on the filter panel. The right-side of the panel contains an **Edit Filter** button, which you can use to easily open the **Filter Builder** for editing.

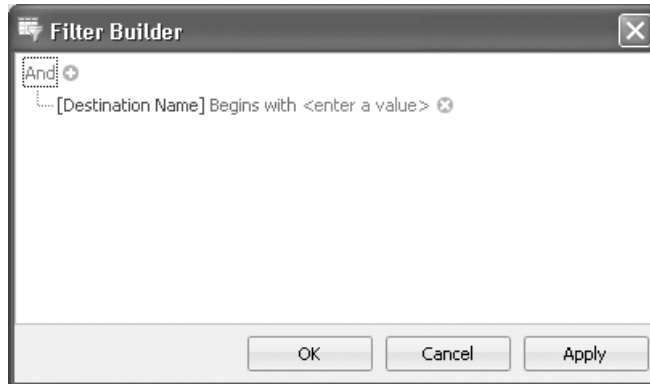


3. To apply another filter, repeat the previous steps.

To create complex filter criteria

Complete the following steps to construct filter criteria using the Filter Builder.

1. Right-click a column header and select **Filter Editor**. The **Filter Builder** dialog box is displayed. If no filtering has been applied to the grid, the Filter Builder will contain a new filter condition referring to the clicked column. If filtering has been applied, the **Filter Builder** will list all current filter conditions.



2. Click the column name link in the condition and select the appropriate column from the list. All available columns are displayed in the list.
3. Click the operator link in the condition and select the appropriate comparison operator from the list. The comparison operator list displays only the operators supported by the current column's data type. For example, the Priority column is of the numeric type so the operator list does not display the "Begins with" operator and other operators that are related to the string type.
4. Click **<enter a value>** and enter a comparison value in the box.
5. To add additional conditions, click the plus button next to the group's AND operator. This action will create new conditions below the current one. Complete each condition statement using the previous steps.
6. Click **OK** or **Apply** to filter data using the created filter condition.

A filter panel is displayed at the bottom of the grid showing the current filter criteria. You can remove the filter by clicking the close (x) button on the panel. You can enable or disable the filter using the check box on the filter panel. The right side of the panel contains an **Edit Filter** button, so that you can easily open the Filter Builder for editing.



You can create more advanced filter criteria containing multiple logical (Boolean) operators. To change the root logical operator, click the current AND operator and select the appropriate operator from the list. You can then add a new filter condition group by clicking the operator and selecting **Add Group**. You can add multiple groups containing multiple conditions. Complete each group using the steps above.

To clear the filter

Use one of the following methods to clear the filter.

- Hover over the filtered column header and click the filter image that is displayed. In the drop-down menu that is displayed, click **(All)**.
- Right-click the filtered column header and select **Clear Filter**.
- To clear all filter criteria, click the close (x) button in the filter panel that is displayed at the bottom of the filtered grid.

To disable or enable the filter

Click the **Enable Filter** check mark in the filter panel that is displayed at the bottom of the filtered grid. You can now toggle the filter on and off in the grid.

Configure columns

You can configure the columns that are displayed in the grid views. You can change the column order and choose which columns you would like to display.

To reorder columns

Click the column header that you want to move. Use a drag-and-drop operation to place the column in a new position.

To hide columns

Click the column header you want to remove. Use a drag-and-drop operation to place the column in the cell area of the grid. When you drag the column in the cell area, the cursor changes its image to an “X.” Dropping the column header will hide the column from the grid.

To display hidden columns

Complete the following steps to display any hidden columns.

1. Right-click a column header and select **Column Chooser**. The **Customization** dialog box displays a listing of any hidden columns.
2. Use a drag-and-drop operation to place the desired column in the grid.

Use grid layouts

Layout files can be saved for each application grid view, Destinations, Sources, Documents, and Library. Layout files can also be saved for the Documents grid that displays in the Destinations and Sources applications. This allows you to choose how you want the Documents grid to appear for each application you open.

When the EOM Console is opened, the grids will display using the last opened layout file. If no layout files have been saved, the grids will display using the default settings. The default settings for the Destinations, Sources, and Library grids are configured in the **Configure Columns Utility**. The default settings for the Documents grid are configured in the **Configure Document Properties Utility**.



Layouts are saved for the EOM Console logged in user on that specific computer. The same user on a different computer will have to setup layouts on that system.

To save grid layouts

Once you have configured the grid views, you can save your grid settings to a layout file. Layouts are saved for the EOM Console logged in user on that specific computer. The same user on a different computer will have to setup the layouts on that system.

1. Configure the grid view. See the previous sections for more information.
2. Right-click in the grid and select Layouts | **Save Layout**. The **Save Layout** dialog box is displayed.
3. In the **Layout name** box, enter the name of the layout file. This will save the layout for the logged in user on that specific computer.
4. Click **OK**.

To reset grid layouts

To clear the layout and return to the default grid settings, right-click in the grid and select Layouts | **Reset layout**.

To load grid layouts

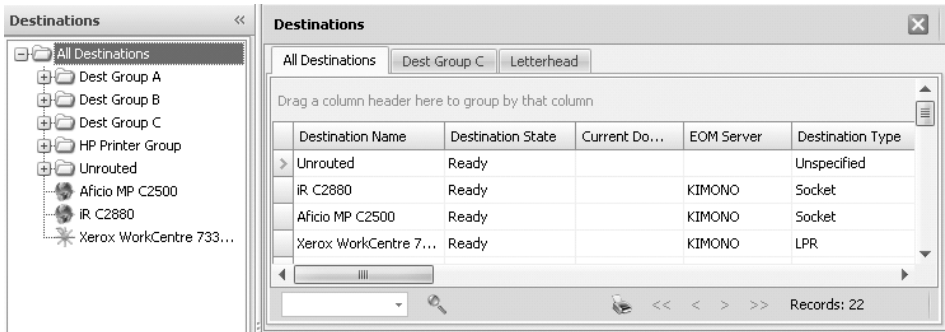
1. Right-click in the grid and select Layouts | **Load layout**. The **Load Layout** dialog box is displayed.
2. In the list, select the layout you want to load. You will only have access to load layout files created by currently logged in user.
3. Click **OK**.

To delete grid layouts

1. Right-click in the grid and select Layouts | **Delete layout**. The **Delete Layout** dialog box is displayed.
2. In the list, select the layout you want to delete. You will only have access to delete layout files created by currently logged in user.
3. Click **OK**.

3.5 Work with destinations

The Destinations application is used to manage and monitor destinations. In the navigation pane, click the **Destinations** button to open the Destinations application. The navigation pane displays a configurable Destinations tree showing all destinations. From the tree, you can create destinations and destination groups. Using drag-and-drop functionality, destinations can be organized into destination groups, which provide a way to easily monitor from the console window.



Navigation pane options

When you right-click an item in the navigation pane, the following options are displayed. The options listed will vary, depending on whether a destination or destination group is selected.

Navigation Pane Option	Explanation
Enable (destinations only)	Enables destinations to accept documents for printing.
Disable (destinations only)	Stops document processing. If a document is printing, the destination state will change to Moving Off-line and the document state will be Busy . The printer will continue to print the document until the document is placed on hold. Once the document state has changed to Hold , the destination will finish printing the data currently in its buffers, and then the destination state will change to Offline .
Open	Opens the destination or destination group in the active tab.
Open in New Tab	Opens the destination or destination group in a new tab.
New Group (destination groups only)	Creates a new destination group under the selected destination group. A new group entry titled "UnNamed" will appear in the tree. Type the new group name and press ENTER to create the group. By default the new group will inherit the security settings of its parent group.

Navigation Pane Option	Explanation
New Destination (destination groups only)	Creates a new destination under the selected destination group. Displays the Add Destination dialog box. By default the new destination will inherit the security settings of its parent group.
Configure (destinations only)	Opens the selected destination in the Destination Configuration utility for editing.
Rename	Renames the selected destination or destination group.
Delete	Deletes the selected destination or destination group. Destination groups cannot be deleted if they contain any destinations or subgroups.
Destination Redirect (destinations only)	Opens the Select Redirected Destination dialog box for configuring redirection for this destination. Redirection causes new documents assigned to a destination to be automatically reassigned to a different destination.
Output History	Opens the Destination Output History window for viewing the output history of selected destinations or destination groups. From the submenu, you can choose from one of the predefined output history time frames or create a custom query.
Security	Opens the Security Configuration dialog box so that you can update the security settings. This option will define the type of access that users and groups have to the either the selected destination or the destinations contained in the selected group.

The console window displays a tabbed view of the Destination tree selection. When a destination group (folder) is selected in the tree, the Destinations grid will display a listing of all of the destinations in the group. When a destination is selected in the tree, a destination home page shows the properties and status of the destination. Notice that the console window is in a tab page control. By default, navigating in the tree will replace the information in the active tab. To open a destination or group in a new tab, right-click the item and select **Open in New Tab**. Your tree selection, open tab pages, and console window settings will be saved for the next time you open the application.

By default a Documents grid will display below the Destinations grid. There are two tabs below the grid: **Spoiled** and **Retained**. The **Spoiled** tab lists all of the documents currently mapped to the destination selected in the tree. The **Retained** tab lists all of the documents that were printed and retained by the selected destination. If a group is selected, the list will contain documents for all of the destinations in the group. You can switch between the tabs to view either spoiled or retained documents. As you select items in the tree, both of the grids are updated to show only the appropriate documents.

Grid right-click options

When you right-click a destination in the grid, the following options display.

Grid Option	Explanation
Enable	Enables destinations to accept documents for printing.
Disable	Stops document processing. If a document is printing, the destination state will change to Moving Off-line and the document state will show Busy . The printer will continue to print the document until the document is placed on hold. Once the document state has changed to Hold , the destination will finish printing the data currently in its buffers, and then the destination state will change to Offline .
View messages	Displays all messages related to the selected destination in the Message Console .
Open	Opens the destination or destination group in the active tab.
Open in New Tab	Opens the destination or destination group in a new tab.
Configure	Opens the selected destination in the Destination Configuration utility for editing.
Alerts	Displays all pending SNMP alerts for the selected destination. The Barr EOM SNMP Service uses SNMP to continuously monitor the specific device/printer status for each destination.
Destination Redirect	Opens the Select Redirected Destination dialog box so that you can configure redirection for this destination. Redirection reassigns new documents assigned to a destination to a different destination.
Security	Opens the Security Configuration dialog box so that you can update the security settings. This option defines the type of access that users and groups have to the selected destination.

Grid Option	Explanation
Layouts	Layout files are saved for the logged in user. You will only have access to load and delete the layout files you create. Delete layout – Allows for deleting layout files created by the current user. The Delete Layout dialog box is displayed. Load layout – Allows for loading layout files created by the current user. The Load Layout dialog box is displayed. Reset layout – Abandons any unsaved grid changes and resets the grid to the default settings. The default settings are configured in the Configure Columns Utility. Save layout – Saves the current grid settings to a layout file for the current user. The Save Layout dialog box is displayed.

Grid status bar options

The following are the options that display in the status bar below the grid.

Status bar options	Explanation
Search	Searches the grid. To search, type the text you want to find and press ENTER or click the Search image. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to stop searching, move to the previous occurrence, and move to the next occurrence.
Print button	Prints the contents of the grid.
Paging buttons	Allows for paging through the grid. Click the double left arrow button (<<) to go to the first page, the left arrow button (<) to go to the previous page, the right arrow button (>) to go to the next page, and the double right arrow button (>>) to go to the last page.
Number of Records	Displays the number of records in the grid.

Destination states

The following table lists the possible destination states.

Destination State	Explanation
Offline	The destination cannot accept documents.
Ready	The destination is ready to accept documents.
Processing	The document that is being sent to the destination is being prepared for printing. The destination is waiting to start printing.
Printing	A document is currently being printed.
Pause	Document processing has been paused.
Intervention	An error has occurred on the printer that requires user intervention. For example, the printer may be out of paper or there could be a printer jam.
Down	An error occurred on the printer.
Warning ON	This state is used only for Barr Enterprise Print Server destination printers. This state indicates that the Barr Enterprise Print Server destination printer is in an intervention state (that is, out of paper, cover open, or needing toner).
Moving Off-Line	The printer has been disabled while a document is being printed. The printer will continue to print the document until it is completed.
Moving On-Line	A transitional state that occurs when the printer is in a Moving Off-Line state, the destination is printing a large document, and the operator decides to set the destination back to Enabled before the document finishes printing.

Manage destination groups

Destination groups are used to organize destinations in the Destinations tree. Groups are represented as folders in the tree. Complete the following steps to manage destination groups in the EOM Console.

To create a destination group

1. From the Destinations tree, right-click a destination group (folder) and select **New Group**. A new group (folder) titled “**UnNamed**” is added to the selected destination group.
2. In the edit field, type the name of the new group and press ENTER. The new group automatically inherits the permissions of the parent group.

To move a destination group

1. From the Destinations tree, select the destination group you want to move.
2. Use a drag-and-drop operation to place the group in the desired tree location. As you drag the item, a yellow arrow will appear to the left of the tree to indicate the location of the group..

To rename a destination group

1. From the Destinations tree, right-click a destination group select **Rename**.
2. In the edit field, type the new group name and press ENTER. To cancel the rename, press ESC.

To delete a destination group

1. From the Destinations tree, right-click the destination group you want to delete.
2. Select **Delete** from the menu. Groups that contain destinations or destination groups cannot be deleted. All of the objects must be removed before the group can be deleted.

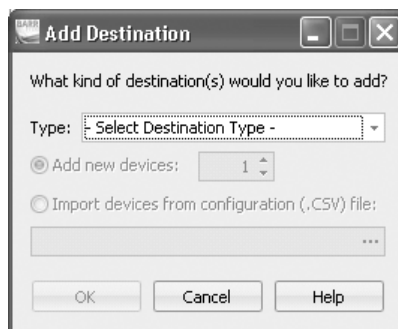
Create and configure destinations

From the Destinations application you can create and configure destinations. The configuration options that are displayed vary, depending on the type of destination selected. You can create the following destination types: email, EOM, Fiery device, FTP, IPDS, IPP, LPR, network folder, PRISMAProduction, SharePoint, socket, WebSphere MQ, and Windows queue. Follow the instructions below for the appropriate destination type.

To send documents to an email address

Complete the following steps to define destinations for printing to an email address. Documents routed to this destination will be sent to the email address specified.

1. From the Destinations tree, select the destination group (folder) where you want to add destinations. Right-click and select **New Destination**. The **Add Destination** dialog box is displayed.



2. In the **Type** list, select **Email**.
3. Next to **Add new devices** enter the number of destinations you want to create. You can create a single email destination or create multiple email destinations and configure them simultaneously.
4. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single destination or multiple destinations.
 - **Single destination configuration** – Configuration options are listed on the tab pages.
 - **Multiple destination configuration** – Destinations are configured in grid format on each tab page. The destinations you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings. You will need to configure the options for each destination row. You can use the **Series Fill** button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row. You can add and remove destinations by clicking **Add** and **Remove** below the grid. You can also select destinations and click **Copy** to create copies.
5. Configure the general settings. For multiple destination configuration, this is configured on the **General** tab.
 - a. Enter the destination **Name**.
 - b. In the **Server** list, click the Barr EOM server where the Barr EOM Output Service is located for this destination.
 - c. Enter any **Comments** or **Location** information for the destination.
 - d. If desired, you can change the large destination image that displays when configuring a single destination. To do so, click **Select Image** and choose the appropriate image file (.bmp, jpg, or png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the destination tree. To change the image back to the default, click **Reset Image**.
6. On the **Email settings** tab, configure the email settings. You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To enter an override value, right-click in the desired Dynamic cell and select **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions.

- a. Select the **Email profile** that will be used with this destination. You can select a profile from the list or click the Browse button and manage profiles from the **Manage Outbound Email Profiles** dialog box. From this dialog box you can create and modify email profiles.
 - b. In the **CC** field, specify the email addresses that will be copied on the message. You can enter multiple email addresses separated by a comma.
 - c. In the **BCC** field, specify the email addresses that will be blind copied on the message. You can enter multiple email addresses separated by a comma.
 - d. In the **From** field, specify the email address that will be shown as the sender of all documents sent to this destination.
 - e. In the **Reply to** field, specify the email address where replies will be routed. You can enter multiple email addresses separated by a comma.
 - f. Enter the **Subject** that will display for all documents sent to this destination.
 - g. Enter the **Body** text that will display in the email message for all documents sent to this destination.
7. On the **More settings** tab, configure the following configuration options.
- a. Select the printing cost per page for black and white and color documents.
 - b. Select the appropriate **Printer family**. Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one from the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - c. If you select a **Printer family**, you can configure **Destination specific capabilities**. This determines which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure**. The **Destination Capabilities** dialog box is displayed. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Barr EOM. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.
 - d. Select the appropriate **Output process**. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PDL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - e. Determine if you want to override the output process assigned to the document and use the selected destination output process.

- f. Select the appropriate **Failover profile**. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - g. Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.
8. On the **Error handling** tab, configure the error handling options.
 - a. Select the appropriate **Error handling profile**. Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document. You can select an existing profile in the list, or create one from the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - b. Choose the **Default failover destination**. This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.
9. Click **OK**.

To route documents to another Barr EOM

Complete the following steps to define destinations for routing to another Barr EOM. Documents routed to this destination will be sent to the Barr EOM server specified.

1. From the Destinations tree, select the destination group (folder) where you want to add destinations. Right-click and select **New Destination**. The **Add Destination** dialog box is displayed.
2. In the **Type** list, select **EOM**.
3. Next to **Add new devices** enter the number of destinations you want to create. You can create a single EOM destination or create multiple EOM destinations and configure them simultaneously.
4. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single destination or multiple destinations.
 - **Single destination configuration** – Configuration options are listed on the tab pages.
 - **Multiple destination configuration** – Destinations are configured in grid format on each tab page. The destinations you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings.

You will need to configure the options for each destination row. You can use the **Series Fill** button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row.

You can add and remove destinations by clicking **Add** and **Remove** below the grid. You can also select destinations and click **Copy** to create copies.

5. Configure the general settings. For multiple destination configuration, this is configured on the **General** tab.
 - a. Enter the destination **Name**.
 - b. In the **Server** list, click the Barr EOM server where the Barr EOM Output Service is located for this destination.
 - c. Enter any **Comments** or **Location** information for the destination.
 - d. If desired, you can change the large destination image that displays when configuring a single destination. To do so, click **Select Image** and choose the appropriate image file (.bmp, jpg, or png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the destination tree. To change the image back to the default, click **Reset Image**.
6. On the **EOM settings** tab, enter the Barr EOM **Server** that will receive all documents sent to this destination.

You can configure a default value and a dynamic override value for this option. The default value is used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default value using document properties and functions. To enter a dynamic override value, right-click in the dynamic field and select **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions.

7. On the **More settings** tab, configure the following configuration options.
 - a. Select the printing cost per page for black and white and color documents.
 - b. Select the appropriate **Printer family**. Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one from the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

- c. If you select a **Printer family**, you can configure **Destination specific capabilities**. This determines which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure**. The **Destination Capabilities** dialog box is displayed. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Barr EOM. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.
- d. Select the appropriate **Output process**. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
- e. Determine if you want to override the output process assigned to the document and use the selected destination output process.
- f. Select the appropriate **Failover profile**. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
- g. Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.
- 8. On the **Error handling** tab, configure the error handling options.
 - a. Select the appropriate **Error handling profile**. Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document. You can select an existing profile in the list, or create one from the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - b. Choose the **Default failover destination**. This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.
- 9. Click **OK**.

To send documents to a fiery device

Complete the following steps to define destinations for printing to a fiery device. Documents routed to this destination will be sent to the fiery device specified.

1. From the Destinations tree, select the destination group (folder) where you want to add destinations. Right-click and select **New Destination**. The **Add Destination** dialog box is displayed.
2. In the **Type** list, select **Fiery Device**.
3. Next to **Add new devices** enter the number of destinations you want to create. You can create a single destination or create multiple destinations and configure them simultaneously.
4. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single destination or multiple destinations.
 - **Single destination configuration** – Configuration options are listed on the tab pages.
 - **Multiple destination configuration** – Destinations are configured in grid format on each tab page. The destinations you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings. You will need to configure the options for each destination row. You can use the **Series Fill** button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row.

You can add and remove destinations by clicking **Add** and **Remove** below the grid. You can also select destinations and click **Copy** to create copies.
5. Configure the general settings. For multiple destination configuration, this is configured on the **General** tab.
 - a. Enter the destination **Name**.
 - b. In the **Server** list, click the Barr EOM server where the Barr EOM Output Service is located for this destination. The destination does not have to be on the same server as the Barr EOM Output Service.
 - c. Enter any **Comments** or **Location** information for the destination.
 - d. If desired, you can change the large destination image that displays when configuring a single destination. To do so, click **Select Image** and choose the appropriate image file (.bmp, jpg, or png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the destination tree. To change the image back to the default, click **Reset Image**.
6. On the **Fiery device settings** tab, configure the fiery device settings.

You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To enter an override value, right-click in the

desired Dynamic cell and select **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions.

- a. Enter a valid **Fiery server**. This can be a server name or IP address.
 - b. Specify the port number. To use the default fiery port, select the **Use default port** checkbox. To specify a port number, disable the checkbox and enter the **Port** number in the spin box. The port number must be from 1 through 65536. The default value is 8021.
 - c. Configure the logon for the server. To use the Windows credentials of the Barr EOM Output Service to logon, select **Use service logon** checkbox. To specify a logon, make sure the checkbox is disabled and enter the **User name** and **Password** that will be used.
 - d. Specify the **Logical printer** on the fiery server that documents will be sent to for printing.
7. On the **More settings** tab, configure the following configuration options.
- a. Select the printing cost per page for black and white and color documents.
 - b. Select the appropriate **Printer family**. Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one from the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - c. If you select a **Printer family**, you can configure **Destination specific capabilities**. This determines which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure**. The **Destination Capabilities** dialog box is displayed. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Barr EOM. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.

- d. Select the appropriate **Output process**. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
- e. Determine if you want to override the output process assigned to the document and use the selected destination output process.
- f. Select the appropriate **Failover profile**. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
- g. Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.
8. On the **Error handling** tab, configure the error handling options.
 - a. Select the appropriate **Error handling profile**. Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document. You can select an existing profile in the list, or create one from the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - b. Choose the **Default failover destination**. This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.
9. Click **OK**.

To send documents to an FTP server

Complete the following steps to define destinations for printing to an FTP server. Documents routed to this destination will be sent to the FTP server specified.

1. From the Destinations tree, select the destination group (folder) where you want to add destinations. Right-click and select **New Destination**. The **Add Destination** dialog box is displayed.
2. In the **Type** list, select **FTP**.
3. Next to **Add new devices** enter the number of destinations you want to create. You can create a single FTP destination or create multiple FTP destinations and configure them simultaneously.

4. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single destination or multiple destinations.
 - **Single destination configuration** – Configuration options are listed on the tab pages.
 - **Multiple destination configuration** – Destinations are configured in grid format on each tab page. The destinations you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings.

You will need to configure the options for each destination row. You can use the **Series Fill** button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row.

You can add and remove destinations by clicking **Add** and **Remove** below the grid. You can also select destinations and click **Copy** to create copies.
5. Configure the general settings. For multiple destination configuration, this is configured on the **General** tab.
 - a. Enter the destination **Name**.
 - b. In the **Server** list, click the Barr EOM server where the Barr EOM Output Service is located for this destination. The destination does not have to be on the same server as the Barr EOM Output Service.
 - c. Enter any **Comments** or **Location** information for the destination.
 - d. If desired, you can change the large destination image that displays when configuring a single destination. To do so, click **Select Image** and choose the appropriate image file (bmp, jpg, or png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the destination tree. To change the image back to the default, click **Reset Image**.
6. On the **FTP settings** tab, configure the FTP settings.

You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To enter an override value, right-click in the desired Dynamic cell and select **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions.

 - a. Enter a valid **FTP server**. This can be an FTP or IP address.
 - b. Enter the host's **Port** number. The port number must be from 1 through 65536. The default value is 21.

- c. Enter the **User name** that will be used when logging on to the host. If the host does not require a user name, you can leave this box blank.
 - d. Enter the **Password** that will be used when logging on to the host. If the host does not require a password, you can leave this box blank.
 - e. Enter the **Target folder**. This is the location on the host where the files will be placed. You must type the entire path of the folder or the path relative to the FTP user home directory (for example, if your home directory is at \FTP\UserName, you can either specify \FTP\UserName\MyDestFiles or \MyDestFiles).
 - f. Choose if you want to **Use passive mode**. This determines if the host mode will be passive or active. Selecting the check box selects passive mode, where the client creates a session to receive data. Unselecting the check box will choose active mode, where the host creates a separate or new session to transfer data in response to a request from the client.
7. On the **More settings** tab, configure the following configuration options.
- a. Select the printing cost per page for black and white and color documents.
 - b. Select the appropriate **Printer family**. Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one from the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - c. If you select a **Printer family**, you can configure **Destination specific capabilities**. This determines which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure**. The **Destination Capabilities** dialog box is displayed. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Barr EOM. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.
 - d. Select the appropriate **Output process**. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PDL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - e. Determine if you want to override the output process assigned to the document and use the selected destination output process.

- f. Select the appropriate **Failover profile**. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - g. Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.
8. On the **Error handling** tab, configure the error handling options.
 - a. Select the appropriate **Error handling profile**. Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document. You can select an existing profile in the list, or create one from the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - b. Choose the **Default failover destination**. This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.
9. Click **OK**.

To send documents to an IPDS printer

Complete the following steps to define destinations for printing to an IPDS printer.



You must have a DocBridge transform package licensed for the necessary input formats and for IPDS output to use IPDS destinations.

1. From the Destinations tree, select the destination group (folder) where you want to add destinations. Right-click and select **New Destination**. The **Add Destination** dialog box is displayed.
2. In the **Type** list, select **IPDS**. Currently you can configure only one IPDS destination at a time.
3. Click **OK**. A tabbed configuration dialog box will display.
4. Enter the destination **Name**.
5. In the **Server** list, click the Barr EOM server where the Barr EOM Output Service is located for this destination.
6. Enter any **Comments** or **Location** information for the destination.
7. If desired, you can change the large destination image that displays. To do so, click **Select Image** and choose the appropriate image file (.bmp, jpg, or png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the destination tree. To change the image back to the default, click **Reset Image**.

8. From the **IPDS settings** tab, click **Create** to create an IPDS transform configuration. If an IPDS configuration is already defined for the printer, click **Edit** to view or change your configuration settings. The **Configure Transform** dialog box displays.
9. In the **Server** list, click the Barr EOM server where the DocBridge transform package is installed.
10. In the **Transform package** list, you can select an existing IPDS transform package or create one. Complete the following steps to create an IPDS transform package.
 - a. Click **New**. The **General** tab displays.
 - b. Enter the transform package **Name**. The transform package **Type** will display IPDS.
 - c. Verify the **EXE path** is set to the correct folder. The EXE path for the IPDS transform type is automatically selected, @EOMTransformDir. To change the path, type in the box or click the ellipsis (...) button.
 - d. Set the **Logging State**. The logging state determines if transform logs and temp files will be saved in the document folder. By default, the **Logging State** is set to **Yes**. All log files should be inspected during installation and pre-production testing to insure that fonts are correctly mapped. In a production system, the logging can be disabled to save disk space. If the transform operation returns an error (return code not zero), the log and temp files will not be deleted, and are available for troubleshooting.
 - e. On the **Filter Profiles** tab, configure the IPD (IPDS) profile to enter the IPDS printer name and IP address. To avoid confusion, we recommend that the same printer name be used within the IPDS profile and for the EOM destination name. Multiple IPDS printers and connections can be configured in the same profile. Configure/select a filter profile for the remaining formats as necessary.
 - To configure a profile, click the ellipsis button in the **Modify/New** column for the appropriate formats. From the **Configure Filter Profile** dialog box, configure the profile as needed. The profile contains a communications and printer definition section.
 - To select a profile, click in the **Configuration** column for the appropriate formats and select the profile from the list.
 - f. On the **Resources** tab, you can control the search order for font resources. You can add paths by clicking in the top row of the grid or modify the listed paths by clicking directly in the grid. You will need to verify the Adobe and Ghostscript paths are correct and update if necessary (make sure to use the path to the fonts, not the path to the EXE file).
 - g. On the **Fonts** tab, you can control the font mapping of input fonts to output fonts. The defaults are typically correct, but may need to be adjusted for special cases. You can add or modify fonts directly in the grid.
 - h. Click **OK** to create the transform package.

11. Use the **Override input filter profile assigned to document** checkbox option to determine if you want to override the input filter profile assigned to the document or if you want to use the filter profile configured in the transform package. Select the checkbox to use the filter profile in the transform package.
12. Configure the conversion of each input format in the **Input Formats** grid and then click **OK**.
 - For all unlicensed input formats and any input formats you don't want to transform, click in the **Configuration** column and select **Do Not Transform**.
 - For licensed input formats, you can select **Use Default Options** or select a predefined configuration in the **Configuration** column. To configure a custom input format, click the ellipsis button in the **Modify/New** column. If **Use Default Options** or **Do Not Transform** is selected in the **Configuration** column, a new configuration will be created. If a predefined configuration is selected, that configuration will be modified. The custom transform options are configured on the **Input options** tab, **Output options** tab, and **Page Layout** tab.
13. In the **Printer name** list, select the IPDS printer to use. To avoid confusion, we recommend that the same printer name be used within the IPDS profile and for the EOM destination name.

You can configure a default value and a dynamic override for this option. The default value is used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default value using document properties and functions. To enter an override value, right-click in the dynamic text box and select **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions.

14. On the **More settings** tab, configure the following configuration options.
 - a. Select the printing cost per page for black and white and color documents.
 - b. Select the appropriate **Printer family**. Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one from the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

- c. If you select a **Printer family**, you can configure **Destination specific capabilities**. This determines which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure**. The **Destination Capabilities** dialog box is displayed. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Barr EOM. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.
 - d. Select the appropriate **Output process**. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - e. Determine if you want to override the output process assigned to the document and use the selected destination output process.
 - f. Select the appropriate **Failover profile**. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - g. Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.
15. On the **Error handling** tab, configure the error handling options.
- a. Select the appropriate **Error handling profile**. Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document. You can select an existing profile in the list, or create one from the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - b. Choose the **Default failover destination**. This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.

16. Click **OK**.
17. The IPDS destination displays the connection status in the **Extended Msg** destination column. Add that column to the destination grid. See the “Configure columns for destinations” section for more information.

To send documents to an IPP destination

Complete the following steps to define destinations for printing to an IPP (Internet Printing Protocol) connected printer.

1. From the Destinations tree, select the destination group (folder) where you want to add destinations. Right-click and select **New Destination**. The **Add Destination** dialog box is displayed.
2. In the **Type** list, select **IPP**.
3. Next to **Add new devices** enter the number of destinations you want to create. You can create a single IPP destination or create multiple IPP destinations and configure them simultaneously.
4. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single destination or multiple destinations.
 - **Single destination configuration** – Configuration options are listed on the tab pages.
 - **Multiple destination configuration** – Destinations are configured in grid format on each tab page. The destinations you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings. You will need to configure the options for each destination row. You can use the **Series Fill** button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row.

You can add and remove destinations by clicking **Add** and **Remove** below the grid. You can also select destinations and click **Copy** to create copies.
5. Configure the general settings. For multiple destination configuration, this is configured on the **General** tab.
 - a. Enter the destination **Name**.
 - b. In the **Server** list, click the Barr EOM server where the Barr EOM Output Service is located for this destination.
 - c. Enter any **Comments** or **Location** information for the destination.
 - d. If desired, you can change the large destination image that displays when configuring a single destination. To do so, click **Select Image** and choose the appropriate image file (.bmp, jpg, or png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the destination tree. To change the image back to the default, click **Reset Image**.

6. On the **IPP settings** tab, configure the IPP settings.

You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To enter an override value, right-click in the desired Dynamic cell and select **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions.

 - a. Enter the **Printer URI** (network address). For example, <http://server/printers/myprinter/printer>.
 - b. If necessary, enter the **Job name** that will be associated with all documents received by this destination. Typically the default **Dynamic override** value will be used for the job name.
 - c. If necessary, enter the **User** that will be associated with all documents received by this destination. Typically the default **Dynamic override** value will be used for the user name.
7. On the **More settings** tab, configure the following configuration options.
 - a. Select the printing cost per page for black and white and color documents.
 - b. For the **Associated device**, select SNMP device that will be associated with the destination. The **Select Device** dialog is displayed.
 - c. Select the appropriate **Printer family**. Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one from the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - d. If you select a **Printer family**, you can configure **Destination specific capabilities**. This determines which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure**. The **Destination Capabilities** dialog box is displayed. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Barr EOM. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.

- e. Select the appropriate **Output process**. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
- f. Determine if you want to override the output process assigned to the document and use the selected destination output process.
- g. Select the appropriate **Failover profile**. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
- h. Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.
8. On the **Error handling** tab, configure the error handling options.
 - a. Select the appropriate **Error handling profile**. Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document. You can select an existing profile in the list, or create one from the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - b. Choose the **Default failover destination**. This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.
9. Click **OK**.

To send documents to an LPR server

Complete the following steps to define destinations for printing to an LPR server. Documents routed to this destination will be sent to the LPR server and queue specified.

1. From the Destinations tree, select the destination group (folder) where you want to add destinations. Right-click and select **New Destination**. The **Add Destination** dialog box is displayed.
2. In the **Type** list, select **LPR**.
3. Next to **Add new devices** enter the number of destinations you want to create. You can create a single LPR destination or create multiple LPR destinations and configure them simultaneously.

4. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single destination or multiple destinations.
 - **Single destination configuration** – Configuration options are listed on the tab pages.
 - **Multiple destination configuration** – Destinations are configured in grid format on each tab page. The destinations you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings.

You will need to configure the options for each destination row. You can use the **Series Fill** button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row.

You can add and remove destinations by clicking **Add** and **Remove** below the grid. You can also select destinations and click **Copy** to create copies.
5. Configure the general settings. For multiple destination configuration, this is configured on the **General** tab.
 - a. Enter the destination **Name**.
 - b. In the **Server** list, click the Barr EOM server where the Barr EOM Output Service is located for this destination.
 - c. Enter any **Comments** or **Location** information for the destination.
 - d. If desired, you can change the large destination image that displays when configuring a single destination. To do so, click **Select Image** and choose the appropriate image file (.bmp, jpg, or png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the destination tree. To change the image back to the default, click **Reset Image**.
6. On the **LPR settings** tab, configure the LPR settings.

You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To enter an override value, right-click in the desired Dynamic cell and select **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions.

 - a. Enter a valid **LPD server**. This can be an IP address or equivalent host name of the print server where documents will be sent.
 - b. Enter the **Port** number for this LPR server. The default value is 515.
 - c. Enter the name of the print **Queue** on the LPD server.

- d. Enter the **Banner Class (-C)**. This specifies the class name to be printed on the banner page. To print the banner page, the `-L` command must be used.
 - e. Enter the **Banner Job Name (-J)**. This specifies the job name to be printed on the banner page. To print the banner page, the `-L` command must be used.
 - f. Enter the **Banner User (-L)**. This causes the banner page to be printed. The user name can be omitted. The banner class (-C) and banner job name (-J) commands must precede this command in the control file to be effective.
 - g. Enter the **Mail User (-M)**. This sends mail to the specified mailbox (example, `mailbox@hostname`) upon completion of the print job.
 - h. Enter the **User (-P)**. This specifies the user identification of the entity requesting the printing job. This must be included in the control file.
 - i. Enter the **Title (-T)**. This provides a title for a file that is to be printed with the “p” command code. It is ignored by all other printing commands.
 - j. Select the **LPR Print command**. The default selection is **Plain text (-Of)**.
 - k. Use the **Control file first** check box to determine if you want to send the control file before the data files. Once the control file has been received, the data files can be printed as they arrive. This is the default configuration.
7. On the **More settings** tab, configure the following configuration options.
- a. Select the printing cost per page for black and white and color documents.
 - b. For the **Associated device**, select SNMP device that will be associated with the destination. The **Select Device** dialog is displayed.
 - c. Select the appropriate **Printer family**. Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one from the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - d. If you select a **Printer family**, you can configure **Destination specific capabilities**. This determines which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure**. The **Destination Capabilities** dialog box is displayed. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Barr EOM. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.

- e. Select the appropriate **Output process**. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
- f. Determine if you want to override the output process assigned to the document and use the selected destination output process.
- g. Select the appropriate **Failover profile**. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
- h. Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.
8. On the **Error handling** tab, configure the error handling options.
 - a. Select the appropriate **Error handling profile**. Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document. You can select an existing profile in the list, or create one from the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - b. Choose the **Default failover destination**. This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.
9. Click **OK**.

To send documents to a network folder

Complete the following steps to define destinations for printing to a network folder. Documents routed to this destination will be saved in the folder specified.

1. From the Destinations tree, select the destination group (folder) where you want to add destinations. Right-click and select **New Destination**. The **Add Destination** dialog box is displayed.
2. In the **Type** list, select **Network Folder**.
3. Next to **Add new devices** enter the number of destinations you want to create. You can create a single network folder destination or create multiple network folder destinations and configure them simultaneously.

4. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single destination or multiple destinations.
 - **Single destination configuration** – Configuration options are listed on the tab pages.
 - **Multiple destination configuration** – Destinations are configured in grid format on each tab page. The destinations you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings. You will need to configure the options for each destination row. You can use the **Series Fill** button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row.

You can add and remove destinations by clicking **Add** and **Remove** below the grid. You can also select destinations and click **Copy** to create copies.
5. Configure the general settings. For multiple destination configuration, this is configured on the **General** tab.
 - a. Enter the destination **Name**.
 - b. In the **Server** list, click the Barr EOM server where the Barr EOM Output Service is located for this destination.



The destination does not have to be on the same server as the Barr EOM Output Service. For example, the network folder destination would have to be a network share. The network share would then need permissions granted for the Output service **Log On As** user account.

- c. Enter any **Comments** or **Location** information for the destination.
 - d. If desired, you can change the large destination image that displays when configuring a single destination. To do so, click **Select Image** and choose the appropriate image file (.bmp, jpg, or png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the destination tree. To change the image back to the default, click **Reset Image**.
6. On the **Folder settings** tab, configure the folder settings. You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To enter an override value, right-click in the desired Dynamic cell and select **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions.

- a. Enter the **Folder** path where documents will be sent. The default folder is C:\Barr Files\.
For the folder selected, you must configure the EOM Services logon account user name to have Full Control Sharing permissions. Also verify the Administrators group has Full Control Security permissions. To configure these options, right-click the folder in Windows Explorer and select **Sharing and Security**.
- b. Enter the **Subfolder** path where documents will be sent. If no subfolder path is entered, documents will be sent to the folder path.
- c. Use the **Create folder** check box to determine if you want to automatically create the specified folders and/or subfolders if they do not exist. This will apply for default and dynamic values.
- d. Enter the **File name** the document will have when it is routed from Barr EOM to its disk destination.
- e. Use the **Base length** spin box to specify the maximum length of the file name. The default length is 40.
- f. Use the **Extension length** spin box to specify the maximum length of the file name extension. The default length is 40.
- g. Use the **Allow spaces** check box to specify how file names that contain spaces will be written, either with the spaces or replacing the spaces with exclamation points (!). When selected and the file name contains spaces, the spaces will be preserved. When this is not selected and the file name contains spaces, the spaces will be replaced with exclamation points. This option is selected by default.
- h. Use the **Delete exclamation** check box to specify if exclamation points will be deleted from the file name.
- i. Use the **Overwrite** check box to determine how to handle duplicate file names. Selecting the check box will cause the new file to overwrite the existing file. If you clear the check box the new file will be saved with a new file name according to the following options.
 - **Counter type** – If a duplicate file name is encountered, a new file name is created using a counter. From the list, choose to add the counter **In Base** or **In Extension**.
 - **Counter length** – Specify the length of the counter that will be placed at the end of the file name base or extension. The default length is 3.
 - **Separator** – Specify the character that separates the file name from the counter. The default character is #. The following are invalid characters: \ / : * ? “ < > | .
 - **Start with counter** – Select this check box to apply the counter to the first file. This option is selected by default. If the numeric counter is specified as the Base, the counter will be used in the base of the file name. If the numeric counter is specified as the Extension, the counter will be used in the file name extension.

7. On the **More settings** tab, configure the following configuration options.
 - a. Select the printing cost per page for black and white and color documents.
 - b. Select the appropriate **Printer family**. Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one from the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - c. If you select a **Printer family**, you can configure **Destination specific capabilities**. This determines which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure**. The **Destination Capabilities** dialog box is displayed. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Barr EOM. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.
 - d. Select the appropriate **Output process**. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJI commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - e. Determine if you want to override the output process assigned to the document and use the selected destination output process.
 - f. Select the appropriate **Failover profile**. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - g. Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.

8. On the **Error handling** tab, configure the error handling options.
 - a. Select the appropriate **Error handling profile**. Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document. You can select an existing profile in the list, or create one from the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the **Browse** button.
 - b. Choose the **Default failover destination**. This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.
9. Click **OK**.

To send documents to a PRISMAProduction destination

Complete the following steps to define PRISMAProduction destinations for the Océ PRISMAProduction server. Documents routed to this destination will be sent to the server specified.

10. From the Destinations tree, select the destination group (folder) where you want to add destinations. Right-click and select **New Destination**. The **Add Destination** dialog box is displayed.
11. In the **Type** list, select **PRISMAProduction**.
12. Next to **Add new devices** enter the number of destinations you want to create. You can create a single PRISMAProduction destination or create multiple PRISMAProduction destinations and configure them simultaneously.
13. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single destination or multiple destinations.
 - **Single destination configuration** – Configuration options are listed on the tab pages.
 - **Multiple destination configuration** – Destinations are configured in grid format on each tab page. The destinations you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings. You will need to configure the options for each destination row. You can use the **Series Fill** button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row. You can add and remove destinations by clicking **Add** and **Remove** below the grid. You can also select destinations and click **Copy** to create copies.

14. Configure the general settings. For multiple destination configuration, this is configured on the **General** tab.
 - c. Enter the destination **Name**.
 - d. In the **Server** list, click the Barr EOM server where the Barr EOM Output Service is located for this destination.
 - e. Enter any **Comments** or **Location** information for the destination.
 - f. If desired, you can change the large destination image that displays when configuring a single destination. To do so, click **Select Image** and choose the appropriate image file (.bmp, jpg, or png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the destination tree. To change the image back to the default, click **Reset Image**.
15. On the **PRISMAProduction settings** tab, configure the following settings.

You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To enter an override value, right-click in the desired Dynamic cell and select **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions.

 - a. Specify the Océ PRISMAProduction **Server** where documents will be sent.
 - b. Specify the **User name** that is associated with the documents.
 - c. If you are configuring a single destination, you can specify the **Job queue** on the printer where documents will be routed.
16. On the **More settings** tab, configure the following configuration options.
 - d. Select the printing cost per page for black and white and color documents.
 - e. For the **Associated device**, select SNMP device that will be associated with the destination. The **Select Device** dialog is displayed.
 - f. Select the appropriate **Printer family**. Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one from the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

- g. If you select a **Printer family**, you can configure **Destination specific capabilities**. This determines which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure**. The **Destination Capabilities** dialog box is displayed. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Barr EOM. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.
- h. Select the appropriate **Output process**. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
- i. Determine if you want to override the output process assigned to the document and use the selected destination output process.
- j. Select the appropriate **Failover profile**. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
- k. Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.
- 17. On the **Error handling** tab, configure the error handling options.
 - l. Select the appropriate **Error handling profile**. Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document. You can select an existing profile in the list, or create one from the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - m. Choose the **Default failover destination**. This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.
- 18. Click **OK**.

To send documents to a SharePoint site

Complete the following steps to define destinations for printing to a SharePoint site.

1. From the Destinations tree, select the destination group (folder) where you want to add destinations. Right-click and select **New Destination**. The **Add Destination** dialog box is displayed.
2. In the **Type** list, select **SharePoint**. Currently you can configure only one SharePoint destination at a time.
3. Click **OK**. A tabbed configuration dialog box will display.
4. Enter the destination **Name**.
5. In the **Server** list, click the Barr EOM server where the Barr EOM Output Service is located for this destination.
6. Enter any **Comments** or **Location** information for the destination.
7. If desired, you can change the large destination image that displays. To do so, click **Select Image** and choose the appropriate image file (.bmp, jpg, or png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the destination tree. To change the image back to the default, click **Reset Image**.
8. From the **SharePoint device settings** tab, configure the following options.
 - a. Specify the **SharePoint site** where documents will be sent (for example, <http://www.barrsystems.com/sampleSite/>).
 - b. Configure the logon for the server. To use the Windows credentials of the Barr EOM Output Service to logon, select **Use service logon** checkbox. To specify a logon, make sure the checkbox is disabled and enter the **User name** and **Password** that will be used.
 - c. If you are using SharePoint 2010 or newer, select **SharePoint 2010 or newer**. If selected, Barr EOM will use the SharePoint 2010 Client interface to communicate with the SharePoint site. If not selected, Barr EOM will use the SharePoint Copy Web service (Copy.aspx) that is supported by all versions of SharePoint.



You can configure a default value and a dynamic override for each of the following options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To enter an override value, right-click in the desired Dynamic cell and select **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions.

- d. In the **Library** box, specify the name of the library in the SharePoint site where the files should be stored.

- e. In the **Folder** box, specify the name of the subfolder under the **Library** specified above, where the files should be stored. If a folder is not specified, the files will be placed in the root folder of the **Library**. This field is optional.
 - f. In the **Document name** box, specify the name to use when naming the document on the SharePoint site. To pass the Barr EOM name through, use [Document Name].
 - g. Use the **Overwrite** checkbox to specify how duplicate document names will be handled on the SharePoint site. If a document is received that has the same name as a document that already exists at that location, select **Overwrite** to overwrite the existing document. If you choose not to overwrite, the new document will not be written to the site.
 - h. Use the **Check-in** checkbox to specify if files will be marked as **Checked In** on the SharePoint site. Select the checkbox to mark the files **Checked In**. Otherwise, it remains checked out by the user specified in the **User name** field above.
 - i. Click **SharePoint fields** to specify values to put in SharePoint fields or to map Barr EOM fields to the SharePoint fields. SharePoint libraries have various fields or columns to describe the files stored in them. They can also have custom fields to provide further descriptive information. Some of these fields can be modified by the user.

To add fields, click **SharePoint fields** and type the appropriate values directly in the **Field Name**, **Default Value**, and **Dynamic Override** columns. Click the **Add** and **Remove** buttons as necessary to remove fields. When finished, click **OK**.
9. On the **More settings** tab, configure the following configuration options.
 - a. Select the printing cost per page for black and white and color documents.
 - b. Select the appropriate **Printer family**. Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one from the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - c. If you select a **Printer family**, you can configure **Destination specific capabilities**. This determines which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure**. The **Destination Capabilities** dialog box is displayed. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Barr EOM. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.

- d. Select the appropriate **Output process**. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - e. Determine if you want to override the output process assigned to the document and use the selected destination output process.
 - f. Select the appropriate **Failover profile**. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - g. Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.
10. On the **Error handling** tab, configure the error handling options.
 - a. Select the appropriate **Error handling profile**. Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document. You can select an existing profile in the list, or create one from the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - b. Choose the **Default failover destination**. This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.
 11. Click **OK**.

To send documents to a socket

Complete the following steps to define destinations for printing to a socket server. Documents routed to this destination will be sent to the IP address and port specified.

1. From the Destinations tree, select the destination group (folder) where you want to add destinations. Right-click and select **New Destination**. The **Add Destination** dialog box is displayed.
2. In the **Type** list, select **Socket**.
3. Next to **Add new devices** enter the number of destinations you want to create. You can create a single socket destination or create multiple socket destinations and configure them simultaneously.

4. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single destination or multiple destinations.
 - **Single destination configuration** – Configuration options are listed on the tab pages.
 - **Multiple destination configuration** – Destinations are configured in grid format on each tab page. The destinations you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings.

You will need to configure the options for each destination row. You can use the **Series Fill** button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row.

You can add and remove destinations by clicking **Add** and **Remove** below the grid. You can also select destinations and click **Copy** to create copies.
5. Configure the general settings. For multiple destination configuration, this is configured on the **General** tab.
 - a. Enter the destination **Name**.
 - b. In the **Server** list, click the Barr EOM server where the Barr EOM Output Service is located for this destination.
 - c. Enter any **Comments** or **Location** information for the destination.
 - d. If desired, you can change the large destination image that displays when configuring a single destination. To do so, click **Select Image** and choose the appropriate image file (.bmp, jpg, or png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the destination tree. To change the image back to the default, click **Reset Image**.
6. On the **Socket** tab, configure the socket settings.

You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To enter an override value, right-click in the desired Dynamic cell and select **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions.

 - a. Enter the **IP address** or equivalent host name of the print server where the documents will be sent.
 - b. Enter the **Port** number that enables IP packets to be sent to a particular process on a computer. The default number is 9100.

7. On the **More settings** tab, configure the following configuration options.
 - a. Select the printing cost per page for black and white and color documents.
 - b. For the **Associated device**, select SNMP device that will be associated with the destination. The **Select Device** dialog is displayed.
 - c. Select the appropriate **Printer family**. Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one from the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - d. If you select a **Printer family**, you can configure **Destination specific capabilities**. This determines which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure**. The **Destination Capabilities** dialog box is displayed. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Barr EOM. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.
 - e. Select the appropriate **Output process**. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - f. Determine if you want to override the output process assigned to the document and use the selected destination output process.
 - g. Select the appropriate **Failover profile**. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - h. Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.

8. On the **Error handling** tab, configure the error handling options.
 - a. Select the appropriate **Error handling profile**. Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document. You can select an existing profile in the list, or create one from the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the **Browse** button.
 - b. Choose the **Default failover destination**. This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.
9. Click **OK**.

To send documents to a WebSphere MQ

Complete the following steps to define WebSphere MQ destinations. WebSphere MQ is a message queuing system designed by IBM that runs on many platforms such as Windows, Unix, Linux, and z/OS. Barr EOM provides an interface into that queuing system. Barr EOM can then communicate (send and receive messages) with other applications using WebSphere MQ.



Documents routed to this destination will be sent as WebSphere MQ messages.

To use this destination, a WebSphere MQ client must be installed separately.

1. From the Destinations tree, select the destination group (folder) where you want to add destinations. Right-click and select **New Destination**. The **Add Destination** dialog box is displayed.
2. In the **Type** list, select **WebSphere MQ**.
3. Next to **Add new devices** enter the number of destinations you want to create. You can create a single WebSphere MQ destination or create multiple WebSphere MQ destinations and configure them simultaneously.
4. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single destination or multiple destinations.
 - **Single destination configuration** – Configuration options are listed on the tab pages.
 - **Multiple destination configuration** – Destinations are configured in grid format on each tab page. The destinations you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings.

You will need to configure the options for each destination row. You can use the **Series Fill** button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row.

You can add and remove destinations by clicking **Add** and **Remove** below the grid. You can also select destinations and click **Copy** to create copies.

5. Configure the general settings. For multiple destination configuration, this is configured on the **General** tab.
 - a. Enter the destination **Name**.
 - b. In the **Server** list, click the Barr EOM server where the Barr EOM Output Service is located for this destination.
 - c. Enter any **Comments** or **Location** information for the destination.
 - d. If desired, you can change the large destination image that displays when configuring a single destination. To do so, click **Select Image** and choose the appropriate image file (.bmp, jpg, or png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the destination tree. To change the image back to the default, click **Reset Image**.

6. On the **WebSphere MQ settings** tab, configure the WebSphere MQ settings.

You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To enter an override value, right-click in the desired Dynamic cell and select **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions.

- a. In the **Queue manager** box, enter the name of the queue manager. This must match the queue manager specified in WebSphere MQ.
- b. In the **Queue name** box, enter the queue name where messages sent to this destination will be stored. This must match the queue name specified in WebSphere MQ.
- c. In the **Channel name** box, enter the channel configured for TCPIP. You can get this name from the WebSphere MQ list of channels.



Make sure the SSL certificate required option is not selected in WebSphere MQ. Barr EOM does not support this at this time.

- d. In the **Connection name** box, enter the IP address and port or DNS name for the server to which you are attempting to connect. Messages are transferred over the connection and placed in the queue..

7. On the **More settings** tab, configure the following configuration options.
 - a. Select the printing cost per page for black and white and color documents.
 - b. Select the appropriate **Printer family**. Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one from the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - c. If you select a **Printer family**, you can configure **Destination specific capabilities**. This determines which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure**. The **Destination Capabilities** dialog box is displayed. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Barr EOM. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.
 - d. Select the appropriate **Output process**. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PDL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - e. Determine if you want to override the output process assigned to the document and use the selected destination output process.
 - f. Select the appropriate **Failover profile**. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - g. Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.

8. On the **Error handling** tab, configure the error handling options.
 - a. Select the appropriate **Error handling profile**. Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document. You can select an existing profile in the list, or create one from the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the **Browse** button.
 - b. Choose the **Default failover destination**. This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.
9. Click **OK**.

To send documents to a Windows queue

Complete the following steps to define Windows queue destinations. Documents routed to this destination will be sent to the print server and queue specified.

1. From the Destinations tree, select the destination group (folder) where you want to add destinations. Right-click and select **New Destination**. The **Add Destination** dialog box is displayed.
2. In the **Type** list, select **Windows Queue**.
3. Next to **Add new devices** enter the number of destinations you want to create. You can create a single Windows queue destination or create multiple Windows queue destinations and configure them simultaneously.
4. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single destination or multiple destinations.
 - **Single destination configuration** – Configuration options are listed on the tab pages.
 - **Multiple destination configuration** – Destinations are configured in grid format on each tab page. The destinations you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings. You will need to configure the options for each destination row. You can use the **Series Fill** button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row.

You can add and remove destinations by clicking **Add** and **Remove** below the grid. You can also select destinations and click **Copy** to create copies.
5. Configure the general settings. For multiple destination configuration, this is configured on the **General** tab.
 - a. Enter the destination **Name**.
 - b. In the **Server** list, click the Barr EOM server where the Barr EOM Output Service is located for this destination.

- c. Enter any **Comments** or **Location** information for the destination.
 - d. If desired, you can change the large destination image that displays when configuring a single destination. To do so, click **Select Image** and choose the appropriate image file (.bmp, jpg, or png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the destination tree. To change the image back to the default, click **Reset Image**.
6. On the **Windows queue settings** tab, configure the Windows queue settings.
- You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To enter an override value, right-click in the desired Dynamic cell and select **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions.
- a. Enter the name of the **Print server** where documents will be sent.
 - b. Enter the name of the **Print queue**.
7. On the **More settings** tab, configure the following configuration options.
- a. Select the printing cost per page for black and white and color documents.
 - b. Select the appropriate **Printer family**. Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one from the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - c. If you select a **Printer family**, you can configure **Destination specific capabilities**. This determines which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure**. The **Destination Capabilities** dialog box is displayed. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Barr EOM. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.

- d. Select the appropriate **Output process**. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
- e. Determine if you want to override the output process assigned to the document and use the selected destination output process.
- f. Select the appropriate **Failover profile**. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
- g. Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.
8. On the **Error handling** tab, configure the error handling options.
 - a. Select the appropriate **Error handling profile**. Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document. You can select an existing profile in the list, or create one from the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - b. Choose the **Default failover destination**. This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.
9. Click **OK**.

Import destinations

Use the following procedure to import a list of destinations into Barr EOM. This is particularly useful if you have a database, spreadsheet, etc. that lists your existing equipment. You can save that document as a .csv file and then import it to create matching destinations in Barr EOM.

Before you begin, review the following information on configuring/importing .csv files:

- In the .csv file, the header record (first record) determines which fields are defined. You must configure the field names in the header record to match predefined Barr EOM names. Field names that match are used to populate the settings associated with that column. Field names that do not match are ignored. Contact Barr Systems Technical Support for the list of predefined Barr EOM names.
- Each record after the header record is created as a device. The device will contain the settings from the recognized columns for that record. Barr EOM interprets values for text and numeric settings. For settings that have a fixed list of options, Barr EOM matches the value to the name of the option. Values which are not recognized, out of bounds, or otherwise invalid are replaced with the default value for that setting.
- Not all settings can be specified through the .csv file. For example, the input/output server, users, destinations, and profiles cannot be imported.
- A single .csv file can be used to generate multiple device types, sources, and destinations. Barr EOM only imports the settings which are recognized by the device type you are creating. For example, the .csv file can contain settings that are common to all devices types, settings for a particular device type, or settings for several different device types.

Complete the following steps to import destinations from a .csv file.

1. From the Destinations tree, right-click a destination group (folder) and select **New Destination**. The new destinations will be created in this group.
2. From the **Add Destination** dialog box, select the destination **Type**. The destination types available for import are Email, EOM, FTP, IPP LPR, Network Folder, Socket, WebSphere MQ, and Windows Queue. You cannot currently import IPDS destinations.
3. Select **Import devices from configuration (.CSV) file**.
4. In the box, enter the path and file name of the configuration file or click the Browse (...) button to navigate to the file.
5. When the configuration file is selected, click **OK**. Tab pages will display with options specific to the selected destination type.
6. Make the necessary changes on each tab. For instructions specific to each destination type, review the following sections:
 - To send documents to an email address
 - To route documents to another Barr EOM

- To send documents to an FTP server
- To send documents to an IPP destination
- To send documents to an LPR server
- To send documents to a network folder
- To send documents to a socket
- To send documents to a WebSphere MQ destination
- To send documents to a Windows queue

Configure the document library

Complete the following steps to configure the Document Library destination. Documents routed to this destination will be sent to the Library application using the assigned library profile settings.

1. From the Destinations tree, right-click the **Document Library** destination and click **Configure**. The document library destination is created by default during software installation.
2. If necessary you can modify the destination **Name** and enter **Comments** and a **Location**.
3. To change the large destination image that displays, click **Select Image** and choose the appropriate image file (.bmp, jpg, or png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the destination tree. To change the image back to the default, click **Reset Image**.
4. From the **Library settings** tab, choose the appropriate **Library profile**. This profile contains all of the settings needed to properly “file” the document. All documents sent to the library destination will be assigned the selected profile. Note, if you route the document using a business rule with a library profile assigned, the business rule library profile will be used.

Select the appropriate library profile from the list or click the Browse button to display the **Manage Document Library Profiles** dialog box. From this dialog box, you can create, modify, and remove library profiles. Complete the following steps to configure a library profile.

- a. From the **Manage Document Library Profiles** dialog box, click **New**.
- b. Specify the library profile **Name** and **Description**.

- c. Determine where documents will be placed in the library. You must first click the **Base folder** Browse button to select an existing folder. If desired, you can then specify one or more **Dynamic folder levels** to be placed under the selected **Base folder**. To create dynamic folders, click **Add** and enter a folder name. The folder name can consist of text, one or more document properties, an functions. To insert document properties, right-click in the text box and select **Insert Document Property**. To insert functions, right-click in the box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions. Once you have entered the folder name, click **OK**.
You can add, edit, and remove folders, and change the folder order using the buttons next to the box. Each level added becomes a sub folder of the folder above it in the list.
 - d. Choose if you want to **Send email notification upon filing**. If you want to send an email notification when a document is sent to the library, select the check box and click **Email**. Configure the email setting on the **Send Email** dialog box.
 - e. Specify the file store for documents sent to the library. You can choose to leave them in their current file store or move them to a specified file store.
 - f. In the **Purge documents** box, specify how long documents should stay in the library before they are deleted.
5. From the **More settings** tab, configure the following configuration options that available to all destination types.
 - a. Enter the **Cost per page** for black and white and color documents. Use the spin boxes to select the printing cost.
 - b. In the **Printer family** list, click the appropriate printer family. You can also click **New** to create a new profile from the **Printer Family Profile** dialog box. Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can click **Edit** to edit the selected profile or click **Manage** to display the **Manage Printer Family Profiles** dialog box which lists all of the defined profiles. When managing profiles, you can create, import, and export profiles, as well as manage all existing profiles.
 - c. In the **Output process** list, click the appropriate process. You can also click **New** to create a new profile from the **Process Designer** window. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJJL commands, inserting overlays, and so on. You can click **Edit** to edit the selected profile or click **Manage** to display the **Manage Output Process Profiles** dialog box which lists all of the defined profiles. When managing profiles, you can create, import, and export profiles, as well as manage all existing profiles.
Select **Override output process assigned to document** if you want to use the selected destination output process rather than the output process assigned to the document.

- d. In the **Failover profile** list, click the appropriate failover profile. You can also click **New** to create a new profile from the Failover Profile dialog box. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can determine what should happen if all of the retries fail and when to place the document in an error state. You can click **Edit** to edit the selected profile or click **Manage** to display the **Manage Failover Profiles** dialog box which lists all of the defined profiles. When managing profiles, you can create, import, and export profiles, as well as manage all existing profiles.
Select **Override failover profile assigned to document** if you want to use the selected destination failover profile rather than the failover profile assigned to the document.
6. From the **Error handling** tab, configure the error handling options as necessary. These options are available for all destinations.
 - a. Select the appropriate **Error handling profile**. Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document. You can select an existing profile in the list, or create one from the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
 - b. Choose the **Default failover destination**. This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a destination group or specific destination. The parent group where the destination currently resides is selected by default.
7. Click **OK**. The library destination is configured and ready to receive documents.
You can route documents to the library using one of the following methods:
 - Creating a business rule with an action to set a library filing profile
 - Manually routing documents to the library destination

Configure security for destinations

EOM security for the Destinations application begins at the root of the Destinations tree, the All Destinations group. The Destinations tree consists of destinations and destination groups. A destination is an output from Barr EOM. A destination group is a way to organize destinations. EOM security is provided by adding a Microsoft Windows user or user group to the destination or destination group and assigning permissions to that user or user group. These EOM permissions define the type of access users and user groups have to the destinations and destination groups. Once the EOM security (Microsoft Windows users, user groups, and destination permissions) is set in a destination group, the EOM security is inherited by all the objects in that destination group. When a new destination or destination group is created, its security is automatically the same as its parent destination group's security (that is, the new destination inherits its security from its parent destination group).



To begin configuring destination security, assign the desired destination permissions for the All Destinations group. To view destinations in the tree, users or user groups must be assigned the **Allow user to view the Destination** permission in the All Destinations group. Users not assigned this permission in the All Destinations group will not see any destinations or groups even though they may have been given permissions for the specific destination or group.

Complete the following steps to assign destination permissions.

1. From the EOM Console, select the **Destinations** application in the navigation pane.
2. In the Destinations tree, right-click a destination or destination group and select **Security**. The **Security Configuration** dialog box is displayed. To access this dialog box, you must be a member of the local Administrators group or be assigned the **Allow user to modify the Destination's security configuration** permission. Users with these rights can add and remove users or groups and modify the assigned permissions.



3. Use the **Inherit permissions from the parent** field to specify that permissions will be inherited from a parent group or to remove inheritance. By default, destinations are configured to inherit permissions from the parent folder. Click the Browse button to select a new parent group for inheritance or to remove inheritance.



It is a good practice to assign rights using inheritance because it makes it easy for administrators to assign and manage permissions. Blocking inheritance is useful when a destination or destination group needs to be seen by just a few users. If you plan to block inheritance, make sure that the users that need access to the blocked destination or group are in the security settings for all of its parent groups, including All Destinations; if this is not done, those users will not be able to see the destination. Also, remember to remove the users and user groups that you do not want to access the destination or group.

4. From the **Users and groups with permissions** list box, select the appropriate user or group in the list. The **Assigned permissions** list box will display the assigned permissions for the selected user.

If you want to set permissions for a user or group that does not appear in the list, click **Add**. From the **User and Group Selection** dialog box, select the users or groups you want to add and click **OK**. If the user or group is not listed, click **More Users** to locate the user. From the drop-down list you can choose to add EOM users, LDAP users, or Windows users. You can also choose to import LDAP users. See the “Add users and groups to Barr EOM” section for detailed procedures on adding users. Once users are added, they are placed in the EOM database and will always be listed in the future.

5. From the **Assigned permissions** box, select or clear the permissions for the selected user or group. Click **Select All** or **Unselect All** to easily assign or remove all permissions. The permissions assigned to a destination group will be inherited for all of the objects contained in that group, except for the ones that have inheritance blocked.

If you notice permissions that are selected and disabled, then the user or group selected has inherited permissions. Inherited permissions cannot be removed. To remove inherited permissions, you must first block inheritance for the destination.

6. Once all of your permission changes are complete, click **OK**.

Configure columns for destinations

From the Administration application, administrators can configure the columns that will be displayed by default in the Destinations grid. Users can add, remove, and reorder columns as necessary from the Destinations grid.

Follow these steps to configure columns for destinations.

1. From the navigation pane, select the **Administration** application.
2. In the navigation pane, click **Configure Columns**.

3. In the console window, select the **Destination columns** tab. All of the columns that currently are displayed in the Destinations grid are listed. Use the following procedures to configure columns.
 - To add columns, click **Add** and select columns from the **Add Column** dialog box. Make sure that you select the appropriate check boxes for the new column.
 - To remove columns, select a row and click **Remove**.
 - To reorder columns, select a row and click **Move Up** or **Move Down**.
 - To change the display name, click the appropriate cell in the **Display Name** column and enter the new name. Cells with a gray background cannot be edited.
 - Use the **Visible in Grid** and **Editable in Grid** columns to specify whether the column will be displayed in the Destinations grid and whether it will be editable. Cells with a gray background cannot be edited.
 - Use the **Visible in Rules** and **Editable in Rules** columns to specify whether the column will be available and editable from the Alert Rules Manager and the Business Rules Manager. Cells with a gray background cannot be edited.
4. Click **Apply** to apply and save column changes.

Manage destinations

Destinations are used only for outbound data. They route files from Barr EOM to a physical destination, such as a laser printer, a host, or other locations on the LAN. You can control destinations from the EOM Console using the following procedures.

To enable a destination

- From the Destinations grid, right-click a destination and select **Enable**.
- From the Destinations tree, right-click a destination and select **Enable**.

To disable a destination

- From the Destinations grid, right-click a destination and select **Disable**.
- From the Destinations tree, right-click a destination and select **Disable**.

To view SNMP alerts

The Barr EOM SNMP Service uses SNMP to continuously monitor the specific device/printer status for each destination. The SNMP Alert Level will display in the Destinations grid and home page for the appropriate destination. You can quickly view the SNMP alerts and details by right-clicking the destination in the grid and selecting **Alerts**. The **Alerts for Destination** dialog box displays all pending SNMP alerts for the selected destination.

To configure the frequency that SNMP is checked for the destination, use the **Manage SNMP Utility**. See the “Configure SNMP monitoring” section for more information.



You can use the **Alert Rules Manager** to configure Barr EOM to take an action when specific alerts occur. See the “Manage Alert Rules” section for more information.

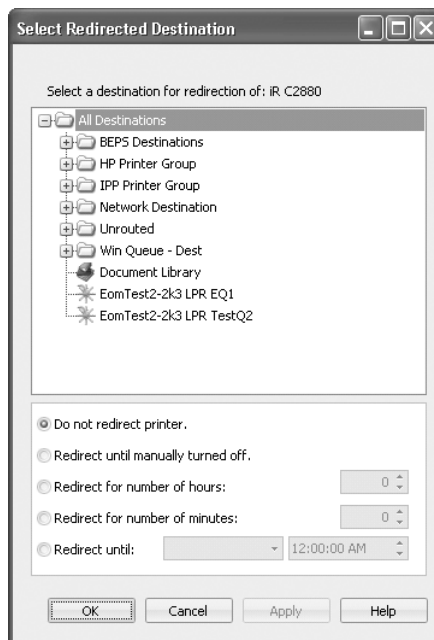
To redirect destinations

Destinations can be set in a redirect mode. This causes new documents assigned to a destination to be automatically reassigned to a different destination.

For example, you can configure Destination A to reassign all received documents to Destination B. Documents already assigned to Destination A when the redirection occurs, will not be redirected. Documents received for Destination A while the redirection is in affect, will be assigned to Destination B. This includes Destination A being assigned by a source as a document is received, Destination A being assigned during business rule processing, and Destination A being assigned by failover processing. Destination assignments as a result of failover to Destination A will also be redirected to Destination B.

Complete the following steps to redirect a destination in the EOM Console.

1. From the Destinations tree or Destination grid, right-click the destination you want to redirect and select **Destination Redirect**. The **Select Redirected Destination** dialog box displays.



2. From the tree, select the destination you want to receive the redirected documents. The destination icon in the tree will indicate if the destination is offline. The images for offline destinations are gray with a red no symbol.
3. Configure the redirect by choosing one of the radio button options. You can select to redirect until manually turned off, redirect for a number of hours, redirect for a number of minutes, or redirect until a specific date and time. To disable redirect, select **Do not redirect printer**.
4. Click **OK**.

To open a destination

- From the Destinations tree, click a destination. The destination will open in the current tab.
- From the Destinations tree, right-click a destination and select **Open**. The destination will open in the current tab.
- From the Destinations tree, right-click a destination and select **Open in New Tab**. The destination will open in a new tab.

To search for destinations

You can search for destinations from the Destinations tree and Destinations grid.

From the Destinations tree

In the Search box below the tree, type the text you want to find and press ENTER or click the search button. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to move to the previous occurrence and move to the next occurrence.

From the Destinations grid:

In the search box below the grid, type the text you want to find, click the column in the grid you want to search, and press ENTER or click the Search image. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to stop searching, move to the previous occurrence, and move to the next occurrence.

To move a destination

Destinations can be organized into destination groups. Once groups are created, destinations and groups can be easily moved in the tree as necessary. Complete the following steps to move a destination in the EOM Console.

1. From the Destinations tree, select the destination you want to move.
2. Use the drag-and-drop operation to place the item in the desired tree location. As you drag the item, a yellow arrow will appear to the left of the tree to indicate where the item will be placed.

To rename a destination

1. From the Destinations tree, right-click a destination and select **Rename**.
2. In the edit field, type the new destination name and press ENTER. To cancel the new name, press ESC.

To copy a destination

Destinations can be copied into multiple destination groups. Complete the following steps to copy a destination in the EOM Console.

1. From the Destinations tree, select the destination you want to copy and hold down the CTRL key.
2. While pressing CTRL, use the drag-and-drop operation to place the destination in the desired tree location. As you drag the item a yellow arrow will appear to the left of the tree to indicate where the copy will be created.

To delete a destination

1. From the Destinations tree, right-click the destination you want to delete.
2. Select **Delete** from the menu.

To view destination output history

Complete the following steps to view the output history of destinations or destination folders. You can choose from one of the predefined output history time frames or create a custom query.

1. From the Destinations tree, select a destination or destination folder.
2. Right-click and select **Output History**. From the submenu choose one of the predefined output history time frames or create a custom query. To create a custom query, complete the following steps.
 - c. In the submenu, select **Custom query**. The query tool dialog displays.
 - d. Click the plus button next to the AND operator.
 - e. To select the column, click the column name link in the condition and select the appropriate column from the list. All available columns will display in the list.
 - f. Click the operator link in the condition and select the appropriate comparison operator from the list. The comparison operator list displays only the operators supported by the current column's data type. For example, the Priority column is of the numeric type so the operator list doesn't display the 'Begins with' operator and other operators that are related to the string type.
 - g. Click the **<enter a value>** link and enter a value in the box.

- h. To add additional conditions, click the plus button next to the group's AND operator. This will create new conditions below the current one. Complete each condition statement using the steps above.
 - i. Click **OK** to query data using the created query statement.
-



You can create more advanced queries containing multiple logical (Boolean) operators. To change the root logical operator, click the current AND operator and select the appropriate operator from the list. You can then add a new query statement group by clicking the operator and selecting **Add Group**. You can add multiple groups containing multiple conditions. Complete each group using the steps above.

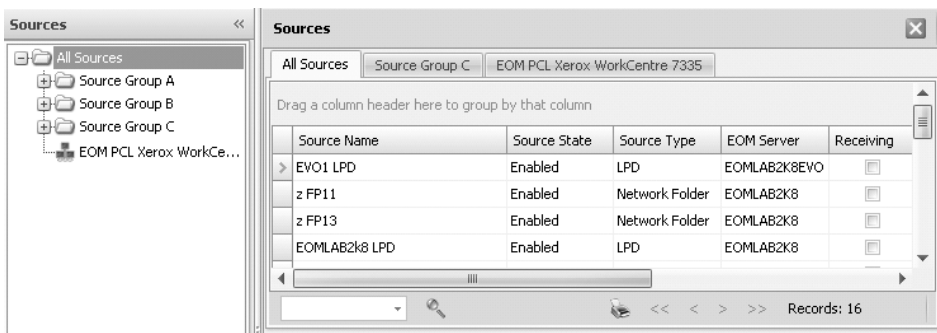
- 3. From the **Destination Output History** window, review the output history for the selected destination or folder.
- 4. Use the following procedures to change the output history as needed.
 - In the Destination tree, click destinations and folders as necessary. The grid will update to match the new tree selection.
 - Click a new history time period as necessary. The grid will update to match the new time period selection.
 - Click **Refresh Query** below the grid to update the grid with the latest information.
 - Use the search box below the tree and grid to search for data as necessary.
 - Click the **Print** button below the grid to print the output history.

To view all messages for a destination

In the Destinations grid, right-click a destination and select **View Messages**. The **Message Console** will display listing all messages related to the selected destination.

3.6 Work with sources

The Sources application is used to manage and monitor sources. In the navigation pane, click the **Sources** button to open the Sources application. The navigation pane displays a configurable Sources tree showing all sources. From the tree, you can create sources and source groups. Using drag-and-drop functionality, sources can be organized into source groups, which allows for easier monitoring from the console window.



Navigation pane options

When you right-click an item in the navigation pane, the following options are displayed. The options listed vary, depending on whether a source or source group is selected.

Navigation Pane Option	Explanation
Enable (sources only)	Enables the source to receive documents into Barr EOM.
Disable (sources only)	Stops the source from receiving documents.
Open	Opens the source or source group in the active tab.
Open in New Tab	Opens the source or source group in a new tab.
New Group (source groups only)	Creates a new source group under the selected source group. A new group entry titled "UnNamed" will appear in the tree. Type the new group name and press ENTER to create the group. By default the new group will inherit the security settings of its parent group.
New Source (source groups only)	Creates a new source under the selected source group. This option displays the Add Source dialog box. By default the new source will inherit the security settings of its parent group.

Navigation Pane Option	Explanation
Configure (sources only)	Opens the selected source in the Source Configuration utility for editing.
Rename	Renames the selected source or source group.
Delete	Deletes the selected source or source group. Source groups cannot be deleted if they contain any sources or subgroups.
Security	Opens the Security Configuration dialog box so that you can update the security settings. This option will define the type of access that users and groups have to the either the selected source or the sources contained in the selected group.

The console window displays a tabbed view of the Source tree selection. When a source group (folder) is selected in the tree, the Sources grid will display a listing of all of the sources in the group. When a source is selected in the tree, a source home page will display showing the properties and status of the source. Notice that the console window is in a tab page control. By default, navigating in the tree will replace the information in the active tab. To open a source or group in new tab, right-click the item in the tree and select **Open in New Tab**. Your tree selection, open tab pages, and console window settings will be saved for the next time you open the application.

By default, a Documents grid is displayed below the Sources grid. There are two tabs below the grid: **Spooled** and **Retained**. The **Spooled** tab lists all of the documents currently received by the source selected in the tree. The **Retained** tab lists all of the documents that were received by the selected source and then retained. If a group is selected, the list will contain documents for all of the sources in the group. You can switch between the tabs to view either spooled or retained documents. As you select items in the tree, both of the grids are updated to show only the appropriate documents.

Grid right-click options

When you right-click a source in the grid, the following options are displayed.

Grid Option	Explanation
Enable	Enables the source to receive documents into Barr EOM.
Disable	Stops the source from receiving documents.
View messages	Displays all messages related to the selected source in the Message Console .
Open	Opens the source or source group in the active tab.
Open in New Tab	Opens the source or source group in a new tab.

Grid Option	Explanation
Configure	Opens the selected source in the Source Configuration utility for editing.
Security	Opens the Security Configuration dialog box so that you can update the security settings. This option will define the type of access that users and groups have to the selected source.
Layouts	Layout files are saved for the logged in user. You will only have access to load and delete the layout files you create. Delete layout – Allows for deleting layout files created by the current user. The Delete Layout dialog box is displayed. Load layout – Allows for loading layout files created by the current user. The Load Layout dialog box is displayed. Reset layout – Abandons any unsaved grid changes and resets the grid to the default settings. The default settings are configured in the Configure Columns Utility. Save layout – Saves the current grid settings to a layout file for the current user. The Save Layout dialog box is displayed.

Grid status bar options

The following are the options that display in the status bar below the grid.

Status bar options	Explanation
Search	Searches the grid. To search, type the text you want to find and press ENTER or click the Search image. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to stop searching, move to the previous occurrence, and move to the next occurrence.
Print button	Prints the contents of the grid.
Paging buttons	Allows for paging through the grid. Click the double left arrow button (<<) to go to the first page, the left arrow button (<) to go to the previous page, the right arrow button (>) to go to the next page, and the double right arrow button (>>) to go to the last page.
Number of Records	Displays the number of records in the grid.

Source states

The following table lists the possible source states.

Source State	Explanation
Enable	Indicates that the source will receive documents into Barr EOM.
Disable	Indicates the source is disabled and cannot receive documents.

Manage source groups

Source groups are used to organize sources in the Sources tree. Groups are represented as folders in the tree. Use the following procedures to manage source groups in the EOM Console.

To create a source group

1. From the Sources tree, right-click a source group (folder) and select **New Group**. A new group (folder) titled “**UnNamed**” is added to the selected source group.
2. In the edit field, type the name of the new group and press ENTER. The new group automatically inherits the permissions of the parent group.

To move a source group

1. From the Sources tree, select the source group that you want to move.
2. Use the drag-and-drop operation to place the group in the desired tree location. As you drag the item a yellow arrow will appear to the left of the tree to indicate where the group will be placed.

To rename a source group

1. From the Sources tree, right-click a source group select **Rename**.
2. In the edit field, type the new group name and press ENTER. To cancel the rename, press ESC.

To delete a source group

1. From the Sources tree, right-click the source group you want to delete.
2. Select **Delete** from the menu. Groups that contain sources or source groups cannot be deleted. All of the objects must be removed before the group can be deleted.

Create and configure sources

From the Sources application you can create and configure sources. The configuration options that are displayed vary depending on the type of source selected. You can create the following source types: email, EOM, FTP, LPD, network folder, socket, Web upload, WebPrint, WebSphere MQ, and Windows Queue. Follow the instructions below for the appropriate source type.

To receive documents from an email address

Complete the following steps to create email sources. Documents received by the specified email account will be routed to Barr EOM.

1. From the Sources tree, select the source group (folder) where you want to add sources. Right-click and select **New Source**. The **Add Source** dialog box is displayed.



2. In the **Type** list, select **Email**.
3. Next to **Add new devices** enter the number of sources you want to create. You can create a single email source or create multiple email sources and configure them simultaneously.
4. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single source or multiple sources.
 - **Single source configuration** – Configuration options are listed on the tab pages.
 - **Multiple source configuration** – Sources are configured in grid format on each tab page. The sources you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings.

You will need to configure the options for each source row. You can use the Series Fill button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row.

You can add and remove sources by clicking **Add** and **Remove** below the grid. You can also select sources and click **Copy** to create copies.

5. Configure the general settings. For multiple source configuration, this is configured on the **General** tab.
 - a. Enter the source **Name**.
 - b. In the **Server** list, click the Barr EOM server where the Barr EOM Input Service is located for this source. The source does not have to be on the same server as the Barr EOM Input Service.
 - c. Enter any **Comments** or **Location** information for the source.
 - d. If desired, you can change the large source image that displays when configuring a single source. To do so, click **Select Image** and choose the appropriate image file (.bmp, .jpg, or .png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that is displayed or the image that is displayed in the source tree. To return the image to its default size, click **Reset Image**.
6. On the **Email settings** tab, configure the following settings.
 - a. Enter a valid **Email server**. You can also click the Browse button to display the **Mail Server Search** dialog box and search for one on a given domain.
 - b. Specify the **Port** number. Port numbers may be different based on the email application that was used to set up the email account. The default port number is 110.
 - c. Choose if you want to **Use SSL** (Secure Sockets Layer) when connecting. This will encrypt the email.
 - d. Enter the **User name** that will be used when logging in to the email account. If the email account does not require a user name, you can leave this box blank.
 - e. Enter the **Password** that will be used when logging in to the email account. If the email account does not require a password, you can leave this blank.
 - f. Specify the time **Interval** for checking the email account for documents. The default value is 60 seconds.
 - g. Use the **Delete messages** checkbox to determine if you want to delete the email messages and their attachments from the email server once they have been received into Barr EOM. This option is selected by default.

7. On the **Filters** tab, configure filters using one of the following methods.
 - **Single source configuration** – The **Filter** column lists the filter criteria. You can modify the filter values by typing directly in the **Regular Expression Value** column. Wild card values of ? or * are accepted, as long as the expressions first character is a numeric or alphabetic character. This filter will be applied to each document received by the selected source. Click **Regular Expression Tester** to verify the expression syntax is valid.
 - **Multiple source configuration** – The filter criteria is displayed in the column headings. You can modify the filter values by typing directly in each cell for the appropriate source. Wild card values of ? or * are accepted, as long as the expressions first character is a numeric or alphabetic character. This filter will be applied to each document received by the selected source.
8. On the **Document properties** tab, configure the document properties that will be applied to all documents received by the source.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

- To use advanced document properties, select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the “Configuring document property profiles” Help topic.
- If you do not want to use advanced document properties, leave the check box disabled and configure the following:
 - Select the **Document owner**. This user will be the owner of all documents received using this source. Click the Browse button to select a user.
 - Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value.

This can only be configured during single source configuration.

9. On the **More settings** tab, configure the following settings.
 - a. Determine if you want all documents received by this source to be in the **Hold** state as they enter the EOM Console. This option is disabled by default.
 - b. Determine if you want to disable business rule processing for all documents received by this source as they enter the EOM Console. This option is disabled by default.

- c. Use the following options to determine if you want to analyze documents as they are received by a source and enter the EOM Console. Selecting these options may cause performance degradation. These options are disabled by default.
 - **Use quick page counting for PDF documents** – Enables optimized page counting for PDF jobs. When this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
 - **Count pages** – Performs a page count on all documents received by this source.
 - **Detect data type** – Detects the data type on all documents received by this source. The data type will display in the Documents grid **Data Type** column.
 - **Detect trays** – Determines the document paper tray that will print the document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Administration **Configure Columns Utility**. You will need to configure the **Document columns** tab.
 - **Detect color** – Detects if the documents received by this source contain color. The Documents grid **Color** column displays True or False depending if color is detected.
 - **Detect duplex** – Detects if the documents received by this source are configured for duplex printing (that is, printing on both sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.
- d. Select the file store that will be used for all documents received by this source as they enter the EOM Console. The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.
- e. Assign a document folder for all documents received by this source as they enter the EOM Console. The default document folder is **Un-Filed Documents**.
- f. Select the printing cost per page for black and white and color documents.
- g. Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state. The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.

10. On the **Output settings** tab, configure the following output settings.
 - a. Use the **Schedule output** option to specify the date and time all documents received by this source will print. You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.
 - b. Use the **Route to destination** option to specify a destination where all documents received by this source can be routed. Click the Browse button to select one or more destinations in the tree. Use the SHIFT and CTRL keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.
 - c. To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.
 - d. Select the appropriate output process. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJI commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
 - e. Select the appropriate failover profile. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
11. Click **OK**.

To receive documents from another Barr EOM

Complete the following steps to create Barr EOM sources. Documents placed this source will be routed to Barr EOM.

1. From the Sources tree, select the source group (folder) where you want to add sources. Right-click and select **New Source**. The **Add Source** dialog box is displayed.
2. In the **Type** list, select **EOM**.
3. Next to **Add new devices** enter the number of sources you want to create. You can create a single EOM source or create multiple EOM sources and configure them simultaneously.

4. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single source or multiple sources.
 - **Single source configuration** – Configuration options are listed on the tab pages.
 - **Multiple source configuration** – Sources are configured in grid format on each tab page. The sources you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings.

You will need to configure the options for each source row. You can use the **Series Fill** button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row.

You can add and remove sources by clicking **Add** and **Remove** below the grid. You can also select sources and click **Copy** to create copies.
5. Configure the general settings. For multiple source configuration, this is configured on the **General** tab.
 - a. Enter the source **Name**.
 - b. In the **Server** list, click the Barr EOM server where the Barr EOM Input Service is located for this source. The source does not have to be on the same server as the Barr EOM Input Service.
 - c. Enter any **Comments** or **Location** information for the source.
 - d. If desired, you can change the large source image that displays when configuring a single source. To do so, click **Select Image** and choose the appropriate image file (.bmp, .jpg, or .png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that is displayed or the image that is displayed in the source tree. To return the image to its default size, click **Reset Image**.

6. On the **Document properties** tab, configure the document properties that will be applied to all documents received by the source.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

- To use advanced document properties, select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the “Configuring document property profiles” Help topic.
- If you do not want to use advanced document properties, leave the check box disabled and configure the following:
 - Select the **Document owner**. This user will be the owner of all documents received using this source. Click the Browse button to select a user.
 - Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value.

This can only be configured during single source configuration.

7. On the **More settings** tab, configure the following settings.
 - a. Determine if you want all documents received by this source to be in the **Hold** state as they enter the EOM Console. This option is disabled by default.
 - b. Determine if you want to disable business rule processing for all documents received by this source as they enter the EOM Console. This option is disabled by default.
 - c. Use the following options to determine if you want to analyze documents as they are received by a source and enter the EOM Console. Selecting these options may cause performance degradation. These options are disabled by default.
 - **Use quick page counting for PDF documents** – Enables optimized page counting for PDF jobs. When this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
 - **Count pages** – Performs a page count on all documents received by this source.

- **Detect data type** – Detects the data type on all documents received by this source. The data type will display in the Documents grid **Data Type** column.
 - **Detect trays** – Determines the document paper tray that will print the document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Administration **Configure Columns Utility**. You will need to configure the **Document columns** tab.
 - **Detect color** – Detects if the documents received by this source contain color. The Documents grid **Color** column displays True or False depending if color is detected.
 - **Detect duplex** – Detects if the documents received by this source are configured for duplex printing (that is, printing on both sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.
- d. Select the file store that will be used for all documents received by this source as they enter the EOM Console. The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.
 - e. Assign a document folder for all documents received by this source as they enter the EOM Console. The default document folder is **Un-Filed Documents**.
 - f. Select the printing cost per page for black and white and color documents.
 - g. Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state. The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
8. On the **Output settings** tab, configure the following output settings.
 - a. Use the **Schedule output** option to specify the date and time all documents received by this source will print. You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.
 - b. Use the **Route to destination** option to specify a destination where all documents received by this source can be routed. Click the Browse button to select one or more destinations in the tree. Use the SHIFT and CTRL keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.
 - c. To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.

- d. Select the appropriate output process. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
 - e. Select the appropriate failover profile. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
9. Click **OK**.

To receive documents from an FTP connection

Complete the following steps to create FTP sources. Documents received by the specified FTP server will be routed to Barr EOM.

1. From the Sources tree, select the source group (folder) where you want to add sources. Right-click and select **New Source**. The **Add Source** dialog box is displayed.
2. In the **Type** list, select **FTP**.
3. Next to **Add new devices** enter the number of sources you want to create. You can create a single FTP source or create multiple FTP sources and configure them simultaneously.
4. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single source or multiple sources.
 - **Single source configuration** – Configuration options are listed on the tab pages.
 - **Multiple source configuration** – Sources are configured in grid format on each tab page. The sources you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings.
 You will need to configure the options for each source row. You can use the Series Fill button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row.
 You can add and remove sources by clicking **Add** and **Remove** below the grid. You can also select sources and click **Copy** to create copies.

5. Configure the general settings. For multiple source configuration, this is configured on the **General** tab.
 - a. Enter the source **Name**.
 - b. In the **Server** list, click the Barr EOM server where the Barr EOM Input Service is located for this source. The source does not have to be on the same server as the Barr EOM Input Service.
 - c. Enter any **Comments** or **Location** information for the source.
 - d. If desired, you can change the large source image that displays when configuring a single source. To do so, click **Select Image** and choose the appropriate image file (.bmp, .jpg, or .png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that is displayed or the image that is displayed in the source tree. To return the image to its default size, click **Reset Image**.
6. On the **FTP settings** tab, configure the following settings.
 - a. Enter a valid **FTP server**. This can be an FTP or IP address.
 - b. Enter the host's **Port** number. The port number must be from 1 through 65536. The default value is 21.
 - c. Choose if you want to **Use passive mode**. This determines if the host mode will be passive or active. Selecting the check box selects passive mode, where the client creates a session to receive data. Clearing the check box will choose active mode, where the host creates a separate or new session to transfer data in response to a request from the client.
 - d. Enter the **User name** that will be used when logging on to the host. If the host does not require a user name, you can leave this box blank.
 - e. Enter the **Password** that will be used when logging on to the host account. If the host account does not require a password, you can leave this blank.
 - f. Enter the **FTP folder**. This is the location on the host from which the files will be retrieved when receiving files. You must type the entire path of the folder or the path relative to the FTP user home directory (for example, if your home directory is at \FTP\UserName, you can either specify \FTP\UserName\MySourceFiles or \MySourceFiles).
 - g. Choose if you want to **Scan subfolders** of the FTP folder specified.
 - h. Choose if you want to **Remove subfolders**. This will delete the subfolders of the FTP folder, after the files are transferred into Barr EOM.
 - i. Specify the time **Interval** for checking the host for documents. The default value is 60 seconds.
 - j. Specify the **Temp folder** location files are transferred into during the FTP session. When the session is complete they are put in the file store..

7. On the **Filters** tab, configure filters using one of the following methods.
 - **Single source configuration** – The **Filter** column lists the filter criteria. You can modify the filter values by typing directly in the **Regular Expression Value** column. Wild card values of ? or * are accepted, as long as the expressions first character is a numeric or alphabetic character. This filter will be applied to each document received by the selected source. Click **Regular Expression Tester** to verify the expression syntax is valid.
 - **Multiple source configuration** – The filter criteria is displayed in the column headings. You can modify the filter values by typing directly in each cell for the appropriate source. Wild card values of ? or * are accepted, as long as the expressions first character is a numeric or alphabetic character. This filter will be applied to each document received by the selected source.
8. On the **Document properties** tab, configure the document properties that will be applied to all documents received by the source.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

- To use advanced document properties, select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the “Configuring document property profiles” Help topic.
- If you do not want to use advanced document properties, leave the check box disabled and configure the following:
 - Select the **Document owner**. This user will be the owner of all documents received using this source. Click the Browse button to select a user.
 - Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value.

This can only be configured during single source configuration.

9. On the **More settings** tab, configure the following settings.
 - a. Determine if you want all documents received by this source to be in the **Hold** state as they enter the EOM Console. This option is disabled by default.
 - b. Determine if you want to disable business rule processing for all documents received by this source as they enter the EOM Console. This option is disabled by default.

- c. Use the following options to determine if you want to analyze documents as they are received by a source and enter the EOM Console. Selecting these options may cause performance degradation. These options are disabled by default.
 - **Use quick page counting for PDF documents** – Enables optimized page counting for PDF jobs. When this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
 - **Count pages** – Performs a page count on all documents received by this source.
 - **Detect data type** – Detects the data type on all documents received by this source. The data type will display in the Documents grid **Data Type** column.
 - **Detect trays** – Determines the document paper tray that will print the document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Administration **Configure Columns Utility**. You will need to configure the **Document columns** tab.
 - **Detect color** – Detects if the documents received by this source contain color. The Documents grid **Color** column displays True or False depending if color is detected.
 - **Detect duplex** – Detects if the documents received by this source are configured for duplex printing (that is, printing on both sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.
- d. Select the file store that will be used for all documents received by this source as they enter the EOM Console. The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.
- e. Assign a document folder for all documents received by this source as they enter the EOM Console. The default document folder is **Un-Filed Documents**.
- f. Select the printing cost per page for black and white and color documents.
- g. Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state. The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.

10. On the **Output settings** tab, configure the following output settings.
 - a. Use the **Schedule output** option to specify the date and time all documents received by this source will print. You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.
 - b. Use the **Route to destination** option to specify a destination where all documents received by this source can be routed. Click the Browse button to select one or more destinations in the tree. Use the SHIFT and CTRL keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.
 - c. To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.
 - d. Select the appropriate output process. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJI commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
 - e. Select the appropriate failover profile. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
11. Click **OK**.

To receive documents from an LPD connection

Complete the following steps to create LPD sources. Documents received by this source will be routed to Barr EOM.

1. From the Sources tree, select the source group (folder) where you want to add sources. Right-click and select **New Source**. The **Add Source** dialog box is displayed.
2. In the **Type** list, select **LPD**.
3. Next to **Add new devices** enter the number of sources you want to create. You can create a single LPD source or create multiple LPD sources and configure them simultaneously.

4. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single source or multiple sources.
 - **Single source configuration** – Configuration options are listed on the tab pages.
 - **Multiple source configuration** – Sources are configured in grid format on each tab page. The sources you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings.

You will need to configure the options for each source row. You can use the **Series Fill** button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row.

You can add and remove sources by clicking **Add** and **Remove** below the grid. You can also select sources and click **Copy** to create copies.
5. Configure the general settings. For multiple source configuration, this is configured on the **General** tab.
 - a. Enter the source **Name**.
 - b. In the **Server** list, click the Barr EOM server where the Barr EOM Input Service is located for this source. The source does not have to be on the same server as the Barr EOM Input Service.
 - c. Enter any **Comments** or **Location** information for the source.
 - d. If desired, you can change the large source image that displays when configuring a single source. To do so, click **Select Image** and choose the appropriate image file (.bmp, .jpg, or .png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that is displayed or the image that is displayed in the source tree. To return the image to its default size, click **Reset Image**.
6. On the **LPD settings** tab, configure the following settings.
 - a. Enter the host's **Port** number. The default value is 515.
 - b. Enter the host's **IP address**. You can click the Browse button to see the available connections or type the address directly in the box.
 - c. In the **Default queue** list, click the queue which will process all requests made to unrecognized queues. All defined LPD queues are listed.
 - d. Specify the **Temp folder** location files are transferred into during the LPD session. When the session is complete they are put in the file store..

7. Configure the LPD queues.
 - **Single source configuration** – The **LPD queues** table lists all defined LPD queues. Select the check boxes in the **Enabled** column to enable/disable the LPD queues. To create a new LPD queue, click **Add** and complete the following steps from the **LPD queue settings** tab.
 - **Multiple source configuration** – Click the Browse button in the **LPD Queue** cell and complete the following steps from the **LPD queue settings** tab.
 - a. Specify the **Queue name**.
 - b. Determine the selections for the following check box options:
 - **Enabled** – Determines if the queue is available to receive documents. This option is selected by default.
 - **Allow restart** – Accepts or rejects the restart command, to reset a particular queue. This option is selected by default.
 - **Allow LPQ** – Determines if the LPQ command line can be used to view the print queue for your current logon name.
 - **Allow LPRM** – Determines if the LPRM command line can be used to remove files in the print queue that were submitted under your current logon name.
8. On the **Filters** tab, configure filters using one of the following methods.
 - **Single source configuration** – The **Filter** column lists the filter criteria. You can modify the filter values by typing directly in the **Regular Expression Value** column. Wild card values of ? or * are accepted, as long as the expressions first character is a numeric or alphabetic character. This filter will be applied to each document received by the selected source. Click **Regular Expression Tester** to verify the expression syntax is valid.
 - **Multiple source configuration** – The filter criteria is displayed in the column headings. You can modify the filter values by typing directly in each cell for the appropriate source. Wild card values of ? or * are accepted, as long as the expressions first character is a numeric or alphabetic character. This filter will be applied to each document received by the selected source.

9. On the **Document properties** tab, configure the document properties that will be applied to all documents received by the source.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

- To use advanced document properties, select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the “Configuring document property profiles” Help topic.
- If you do not want to use advanced document properties, leave the check box disabled and configure the following:
 - Select the **Document owner**. This user will be the owner of all documents received using this source. Click the Browse button to select a user.
 - Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value.

This can only be configured during single source configuration.

10. On the **More settings** tab, configure the following settings.
 - a. Determine if you want all documents received by this source to be in the **Hold** state as they enter the EOM Console. This option is disabled by default.
 - b. Determine if you want to disable business rule processing for all documents received by this source as they enter the EOM Console. This option is disabled by default.
 - c. Use the following options to determine if you want to analyze documents as they are received by a source and enter the EOM Console. Selecting these options may cause performance degradation. These options are disabled by default.
 - **Use quick page counting for PDF documents** – Enables optimized page counting for PDF jobs. When this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
 - **Count pages** – Performs a page count on all documents received by this source.

- **Detect data type** – Detects the data type on all documents received by this source. The data type will display in the Documents grid **Data Type** column.
 - **Detect trays** – Determines the document paper tray that will print the document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Administration **Configure Columns Utility**. You will need to configure the **Document columns** tab.
 - **Detect color** – Detects if the documents received by this source contain color. The Documents grid **Color** column displays True or False depending if color is detected.
 - **Detect duplex** – Detects if the documents received by this source are configured for duplex printing (that is, printing on both sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.
- d. Select the file store that will be used for all documents received by this source as they enter the EOM Console. The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.
 - e. Assign a document folder for all documents received by this source as they enter the EOM Console. The default document folder is **Un-Filed Documents**.
 - f. Select the printing cost per page for black and white and color documents.
 - g. Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state. The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
11. On the **Output settings** tab, configure the following output settings.
 - a. Use the **Schedule output** option to specify the date and time all documents received by this source will print. You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.
 - b. Use the **Route to destination** option to specify a destination where all documents received by this source can be routed. Click the Browse button to select one or more destinations in the tree. Use the SHIFT and CTRL keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.
 - c. To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.

- d. Select the appropriate output process. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
 - e. Select the appropriate failover profile. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
12. Click **OK** to save the LPD queue configuration.
 13. Click **OK** to save the LPD source configuration.

To receive documents from a network folder

Complete the following steps to create network folder sources. Documents placed in the specified network folder will be routed to Barr EOM.

1. From the Sources tree, select the source group (folder) where you want to add sources. Right-click and select **New Source**. The **Add Source** dialog box is displayed.
2. In the **Type** list, select **Network Folder**.
3. Next to **Add new devices** enter the number of sources you want to create. You can create a single network folder source or create multiple network folder sources and configure them simultaneously.
4. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single source or multiple sources.
 - **Single source configuration** – Configuration options are listed on the tab pages.
 - **Multiple source configuration** – Sources are configured in grid format on each tab page. The sources you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings.

You will need to configure the options for each source row. You can use the Series Fill button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row.

You can add and remove sources by clicking **Add** and **Remove** below the grid. You can also select sources and click **Copy** to create copies.

5. Configure the general settings. For multiple source configuration, this is configured on the **General** tab.
 - a. Enter the source **Name**.
 - b. In the **Server** list, click the Barr EOM server where the Barr EOM Input Service is located for this source. The source does not have to be on the same server as the Barr EOM Input Service.
 - c. Enter any **Comments** or **Location** information for the source.
 - d. If desired, you can change the large source image that displays when configuring a single source. To do so, click **Select Image** and choose the appropriate image file (.bmp, .jpg, or .png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that is displayed or the image that is displayed in the source tree. To return the image to its default size, click **Reset Image**.
6. On the **Folder settings** tab, configure the following settings.
 - a. Specify the **Folder** that will be monitored. Enter the path of the network folder

For the folder selected, you must configure the EOM Services logon account user name to have Full Control Sharing permissions. Also verify the Administrators group has Full Control Security permissions. To configure these options, right-click the folder in Windows Explorer and select **Sharing and Security**.
 - b. Use the **Scan subfolders** check box to determine if you want to check the subfolders of the network folder.
 - c. Specify the time **Interval** for checking the folder for files. The default value is 10 seconds.
 - d. Select the **Disposition**. This will determine what will happen to the original file after it is sent to the EOM Console. You can choose to **Delete**, **Leave**, **Move**, or **Move/Overwrite**.
 - e. If **Move** or **Move/Overwrite** is selected as the file **Disposition**, in the **Move to** field, enter the folder path where the file will be moved.
7. On the **Filters** tab, configure filters using one of the following methods.
 - **Single source configuration** – The **Filter** column lists the filter criteria. You can modify the filter values by typing directly in the **Regular Expression Value** column. Wild card values of ? or * are accepted, as long as the expressions first character is a numeric or alphabetic character. This filter will be applied to each document received by the selected source. Click **Regular Expression Tester** to verify the expression syntax is valid.
 - **Multiple source configuration** – The filter criteria is displayed in the column headings. You can modify the filter values by typing directly in each cell for the appropriate source. Wild card values of ? or * are accepted, as long as the expressions first character is a numeric or alphabetic character. This filter will be applied to each document received by the selected source.

8. On the **Document properties** tab, configure the document properties that will be applied to all documents received by the source.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

- To use advanced document properties, select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the “Configuring document property profiles” Help topic.
- If you do not want to use advanced document properties, leave the check box disabled and configure the following:
 - Select the **Document owner**. This user will be the owner of all documents received using this source. Click the Browse button to select a user.
 - Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value.

This can only be configured during single source configuration.

9. On the **More settings** tab, configure the following settings.
 - a. Determine if you want all documents received by this source to be in the **Hold** state as they enter the EOM Console. This option is disabled by default.
 - b. Determine if you want to disable business rule processing for all documents received by this source as they enter the EOM Console. This option is disabled by default.
 - c. Use the following options to determine if you want to analyze documents as they are received by a source and enter the EOM Console. Selecting these options may cause performance degradation. These options are disabled by default.
 - **Use quick page counting for PDF documents** – Enables optimized page counting for PDF jobs. When this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
 - **Count pages** – Performs a page count on all documents received by this source.

- **Detect data type** – Detects the data type on all documents received by this source. The data type will display in the Documents grid **Data Type** column.
 - **Detect trays** – Determines the document paper tray that will print the document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Administration **Configure Columns Utility**. You will need to configure the **Document columns** tab.
 - **Detect color** – Detects if the documents received by this source contain color. The Documents grid **Color** column displays True or False depending if color is detected.
 - **Detect duplex** – Detects if the documents received by this source are configured for duplex printing (that is, printing on both sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.
- d. Select the file store that will be used for all documents received by this source as they enter the EOM Console. The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.
 - e. Assign a document folder for all documents received by this source as they enter the EOM Console. The default document folder is **Un-Filed Documents**.
 - f. Select the printing cost per page for black and white and color documents.
 - g. Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state. The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
10. On the **Output settings** tab, configure the following output settings.
 - a. Use the **Schedule output** option to specify the date and time all documents received by this source will print. You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.
 - b. Use the **Route to destination** option to specify a destination where all documents received by this source can be routed. Click the Browse button to select one or more destinations in the tree. Use the SHIFT and CTRL keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.
 - c. To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.

- d. Select the appropriate output process. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
- e. Select the appropriate failover profile. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.

11. Click **OK**.

To receive documents from a socket connection

Complete the following steps to create socket sources. Documents placed this source will be routed to Barr EOM.

1. From the Sources tree, select the source group (folder) where you want to add sources. Right-click and select **New Source**. The **Add Source** dialog box is displayed.
2. In the **Type** list, select **Socket**.
3. Next to **Add new devices** enter the number of sources you want to create. You can create a single socket source or create multiple socket sources and configure them simultaneously.
4. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single source or multiple sources.
 - **Single source configuration** – Configuration options are listed on the tab pages.
 - **Multiple source configuration** – Sources are configured in grid format on each tab page. The sources you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings.
 You will need to configure the options for each source row. You can use the Series Fill button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row.
 You can add and remove sources by clicking **Add** and **Remove** below the grid. You can also select sources and click **Copy** to create copies.

5. Configure the general settings. For multiple source configuration, this is configured on the **General** tab.
 - a. Enter the source **Name**.
 - b. In the **Server** list, click the Barr EOM server where the Barr EOM Input Service is located for this source. The source does not have to be on the same server as the Barr EOM Input Service.
 - c. Enter any **Comments** or **Location** information for the source.
 - d. If desired, you can change the large source image that displays when configuring a single source. To do so, click **Select Image** and choose the appropriate image file (.bmp, .jpg, or .png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that is displayed or the image that is displayed in the source tree. To return the image to its default size, click **Reset Image**.
6. On the **Socket settings** tab, configure the following settings.
 - a. Enter the **Port** number. The default value is 9100.
 - b. Enter the **IP address** on the local system where the socket device will receive documents. In most cases, this can be left blank, as most systems only have one IP address. For systems with multiple adapters or if multiple IP addresses are supported (that is, when using a VPN), this specifies the IP address for the appropriate port.
 - c. Determine if you want to **Support PJJ status readback**. This enables the socket source to emulate two way printer communications. The print job sender can send PJJ commands that prompt a printer to respond with status information, and if it expects a response, it may wait until that response arrives before continuing with the job.
7. On the **Document properties** tab, configure the document properties that will be applied to all documents received by the source.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

- To use advanced document properties, select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the “Configuring document property profiles” Help topic.
- If you do not want to use advanced document properties, leave the check box disabled and configure the following:
 - Select the **Document owner**. This user will be the owner of all documents received using this source. Click the Browse button to select a user.

- Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value.

This can only be configured during single source configuration.

8. On the **More settings** tab, configure the following settings.
 - a. Determine if you want all documents received by this source to be in the **Hold** state as they enter the EOM Console. This option is disabled by default.
 - b. Determine if you want to disable business rule processing for all documents received by this source as they enter the EOM Console. This option is disabled by default.
 - c. Use the following options to determine if you want to analyze documents as they are received by a source and enter the EOM Console. Selecting these options may cause performance degradation. These options are disabled by default.
 - **Use quick page counting for PDF documents** – Enables optimized page counting for PDF jobs. When this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
 - **Count pages** – Performs a page count on all documents received by this source.
 - **Detect data type** – Detects the data type on all documents received by this source. The data type will display in the Documents grid **Data Type** column.
 - **Detect trays** – Determines the document paper tray that will print the document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Administration **Configure Columns Utility**. You will need to configure the **Document columns** tab.
 - **Detect color** – Detects if the documents received by this source contain color. The Documents grid **Color** column displays True or False depending if color is detected.
 - **Detect duplex** – Detects if the documents received by this source are configured for duplex printing (that is, printing on both sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.

- d. Select the file store that will be used for all documents received by this source as they enter the EOM Console. The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.
 - e. Assign a document folder for all documents received by this source as they enter the EOM Console. The default document folder is **Un-Filed Documents**.
 - f. Select the printing cost per page for black and white and color documents.
 - g. Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state. The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
9. On the **Output settings** tab, configure the following output settings.
- a. Use the **Schedule output** option to specify the date and time all documents received by this source will print. You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.
 - b. Use the **Route to destination** option to specify a destination where all documents received by this source can be routed. Click the Browse button to select one or more destinations in the tree. Use the SHIFT and CTRL keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.
 - c. To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.
 - d. Select the appropriate output process. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
 - e. Select the appropriate failover profile. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
10. Click **OK**.

To receive documents from a Web Upload source

Complete the following steps to create web upload sources. Documents placed this source will be routed to Barr EOM.

1. From the Sources tree, select the source group (folder) where you want to add sources. Right-click and select **New Source**. The **Add Source** dialog box is displayed.
2. In the **Type** list, select **Web Upload**.
3. Next to **Add new devices** enter the number of sources you want to create. You can create a single web upload source or create multiple web upload sources and configure them simultaneously.
4. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single source or multiple sources.
 - **Single source configuration** – Configuration options are listed on the tab pages.
 - **Multiple source configuration** – Sources are configured in grid format on each tab page. The sources you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings.

You will need to configure the options for each source row. You can use the Series Fill button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row.

You can add and remove sources by clicking **Add** and **Remove** below the grid. You can also select sources and click **Copy** to create copies.
5. Configure the general settings. For multiple source configuration, this is configured on the **General** tab.
 - f. Enter the source **Name**.
 - g. In the **Server** list, click the Barr EOM server where the Barr EOM Input Service is located for this source. The source does not have to be on the same server as the Barr EOM Input Service.
 - h. Enter any **Comments** or **Location** information for the source.
 - i. If desired, you can change the large source image that displays when configuring a single source. To do so, click **Select Image** and choose the appropriate image file (.bmp, .jpg, or .png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that is displayed or the image that is displayed in the source tree. To return the image to its default size, click **Reset Image**.

6. On the **Web upload settings** tab, configure the following settings.
 - a. Select the **Web server**. The list displays all of the web servers available to the selected Barr EOM server.
 - b. Select the **Source Capabilities Profile**. This specifies which print preferences/document properties are supported by this source. Those preferences are stored in a source property profile. Click the arrow to select an existing profile, or click the Browse button to create and manage profiles from the **Manage Source Properties Profiles** dialog box.
7. On the **Document properties** tab, configure the document properties that will be applied to all documents received by the source.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

- To use advanced document properties, select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the “Configuring document property profiles” Help topic.
- If you do not want to use advanced document properties, leave the check box disabled and configure the following:
 - Select the **Document owner**. This user will be the owner of all documents received using this source. Click the Browse button to select a user.
 - Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value.

This can only be configured during single source configuration.

8. On the **More settings** tab, configure the following settings.
 - c. Determine if you want all documents received by this source to be in the **Hold** state as they enter the EOM Console. This option is disabled by default.
 - d. Determine if you want to disable business rule processing for all documents received by this source as they enter the EOM Console. This option is disabled by default.

- e. Use the following options to determine if you want to analyze documents as they are received by a source and enter the EOM Console. Selecting these options may cause performance degradation. These options are disabled by default.
 - **Use quick page counting for PDF documents** – Enables optimized page counting for PDF jobs. When this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
 - **Count pages** – Performs a page count on all documents received by this source.
 - **Detect data type** – Detects the data type on all documents received by this source. The data type will display in the Documents grid **Data Type** column.
 - **Detect trays** – Determines the document paper tray that will print the document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Administration **Configure Columns Utility**. You will need to configure the **Document columns** tab.
 - **Detect color** – Detects if the documents received by this source contain color. The Documents grid **Color** column displays True or False depending if color is detected.
 - **Detect duplex** – Detects if the documents received by this source are configured for duplex printing (that is, printing on both sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.
- f. Select the file store that will be used for all documents received by this source as they enter the EOM Console. The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.
- g. Assign a document folder for all documents received by this source as they enter the EOM Console. The default document folder is **Un-Filed Documents**.
- h. Select the printing cost per page for black and white and color documents.
- i. Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state. The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.

9. On the **Output settings** tab, configure the following output settings.
 10. Use the **Schedule output** option to specify the date and time all documents received by this source will print. You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.
 - j. Use the **Route to destination** option to specify a destination where all documents received by this source can be routed. Click the Browse button to select one or more destinations in the tree. Use the SHIFT and CTRL keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.
 - k. To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.
 - l. Select the appropriate output process. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
 - m. Select the appropriate failover profile. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
11. Click **OK**.

To receive documents from a WebPrint source

Complete the following steps to create WebPrint sources. WebPrint sources are used with the IKON WebPrint web submission service for printing documents at print shops where Barr EOM is installed. To use this source, submit PDFs through the IKON web site and pick the store where you want it to print. Barr EOM then retrieves the documents at the print shop, applies the options, and prints them.

1. From the Sources tree, select the source group (folder) where you want to add sources. Right-click and select **New Source**. The **Add Source** dialog box is displayed.
2. In the **Type** list, select **WebPrint**.
3. Next to **Add new devices** enter the number of sources you want to create. You can create a single WebPrint source or create multiple WebPrint sources and configure them simultaneously.

4. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single source or multiple sources.
 - **Single source configuration** – Configuration options are listed on the tab pages.
 - **Multiple source configuration** – Sources are configured in grid format on each tab page. The sources you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings.

You will need to configure the options for each source row. You can use the **Series Fill** button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row.

You can add and remove sources by clicking **Add** and **Remove** below the grid. You can also select sources and click **Copy** to create copies.
5. Configure the general settings. For multiple source configuration, this is configured on the **General** tab.
 - a. Enter the source **Name**.
 - b. In the **Server** list, click the Barr EOM server where the Barr EOM Input Service is located for this source. The source does not have to be on the same server as the Barr EOM Input Service.
 - c. Enter any **Comments** or **Location** information for the source.
 - d. If desired, you can change the large source image that displays when configuring a single source. To do so, click **Select Image** and choose the appropriate image file (.bmp, .jpg, or .png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that is displayed or the image that is displayed in the source tree. To return the image to its default size, click **Reset Image**.
6. On the **WebPrint settings** tab, configure the following settings.
 - a. In the **Server URL** box, specify the web address of the IKON/Ricoh WebPrint service.
 - b. Specify the **User name** that will be used when logging on to the server.
 - c. Enter the **Password/Confirm password** that will be used when logging on to the server.
 - d. Enter the **Store name** for which this source will retrieve documents.

7. On the **Document properties** tab, configure the document properties that will be applied to all documents received by the source.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

- To use advanced document properties, select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the “Configuring document property profiles” Help topic.
- If you do not want to use advanced document properties, leave the check box disabled and configure the following:
 - Select the **Document owner**. This user will be the owner of all documents received using this source. Click the Browse button to select a user.
 - Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value.

This can only be configured during single source configuration.

8. On the **More settings** tab, configure the following settings.
 - a. Determine if you want all documents received by this source to be in the **Hold** state as they enter the EOM Console. This option is disabled by default.
 - b. Determine if you want to disable business rule processing for all documents received by this source as they enter the EOM Console. This option is disabled by default.
 - c. Use the following options to determine if you want to analyze documents as they are received by a source and enter the EOM Console. Selecting these options may cause performance degradation. These options are disabled by default.
 - **Use quick page counting for PDF documents** – Enables optimized page counting for PDF jobs. When this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
 - **Count pages** – Performs a page count on all documents received by this source.

- **Detect data type** – Detects the data type on all documents received by this source. The data type will display in the Documents grid **Data Type** column.
 - **Detect trays** – Determines the document paper tray that will print the document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Administration **Configure Columns Utility**. You will need to configure the **Document columns** tab.
 - **Detect color** – Detects if the documents received by this source contain color. The Documents grid **Color** column displays True or False depending if color is detected.
 - **Detect duplex** – Detects if the documents received by this source are configured for duplex printing (that is, printing on both sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.
- d. Select the file store that will be used for all documents received by this source as they enter the EOM Console. The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.
 - e. Assign a document folder for all documents received by this source as they enter the EOM Console. The default document folder is **Un-Filed Documents**.
 - f. Select the printing cost per page for black and white and color documents.
 - g. Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state. The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
9. On the **Output settings** tab, configure the following output settings.
 - a. Use the **Schedule output** option to specify the date and time all documents received by this source will print. You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.
 - b. Use the **Route to destination** option to specify a destination where all documents received by this source can be routed. Click the Browse button to select one or more destinations in the tree. Use the SHIFT and CTRL keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.
 - c. To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.

- d. Select the appropriate output process. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
- e. Select the appropriate failover profile. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.

10. Click **OK**.

To receive messages from WebSphere MQ

WebSphere MQ is a message queuing system designed by IBM that runs on many platforms such as Windows, Unix, Linux, and z/OS. Barr EOM provides an interface into that queuing system. Barr EOM can then communicate (send and receive messages) with other applications using WebSphere MQ.

Complete the following steps to create sources that will receive WebSphere MQ messages.

1. From the Sources tree, select the source group (folder) where you want to add sources. Right-click and select **New Source**. The **Add Source** dialog box is displayed.
2. In the **Type** list, select **WebSphere MQ**.
3. Next to **Add new devices** enter the number of sources you want to create. You can create a single WebSphere MQ source or create multiple WebSphere MQ sources and configure them simultaneously.
4. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single source or multiple sources.
 - **Single source configuration** – Configuration options are listed on the tab pages.
 - **Multiple source configuration** – Sources are configured in grid format on each tab page. The sources you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings.
 You will need to configure the options for each source row. You can use the Series Fill button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row.
 You can add and remove sources by clicking **Add** and **Remove** below the grid. You can also select sources and click **Copy** to create copies.

5. Configure the general settings. For multiple source configuration, this is configured on the **General** tab.
 - a. Enter the source **Name**.
 - b. In the **Server** list, click the Barr EOM server where the Barr EOM Input Service is located for this source. The source does not have to be on the same server as the Barr EOM Input Service.
 - c. Enter any **Comments** or **Location** information for the source.
 - d. If desired, you can change the large source image that displays when configuring a single source. To do so, click **Select Image** and choose the appropriate image file (.bmp, .jpg, or .png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that is displayed or the image that is displayed in the source tree. To return the image to its default size, click **Reset Image**.
6. On the **WebSphere MQ settings** tab, configure the following settings.
 - a. Enter the **Queue manager** name. This must match the queue manager specified in WebSphere MQ.
 - b. Enter the **Queue name** where received messages will be stored. This must match the queue name specified in WebSphere MQ.
 - c. In the **Channel name** field, enter the channel configured for TCPIP. You can get this name from the WebSphere MQ list of channels.



Make sure the SSL certificate required option is not selected in WebSphere MQ. Barr EOM does not support this at this time.

- d. In the **Connection name** field, enter the IP address and port or DNS name for the server to which you are attempting to connect. Messages are transferred over the connection and placed in the queue.
7. On the **Document properties** tab, configure the document properties that will be applied to all documents received by the source.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

- To use advanced document properties, select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the “Configuring document property profiles” Help topic.
- If you do not want to use advanced document properties, leave the check box disabled and configure the following:
 - Select the **Document owner**. This user will be the owner of all documents received using this source. Click the Browse button to select a user.

- Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value.

This can only be configured during single source configuration.

8. On the **More settings** tab, configure the following settings.
 - a. Determine if you want all documents received by this source to be in the **Hold** state as they enter the EOM Console. This option is disabled by default.
 - b. Determine if you want to disable business rule processing for all documents received by this source as they enter the EOM Console. This option is disabled by default.
 - c. Use the following options to determine if you want to analyze documents as they are received by a source and enter the EOM Console. Selecting these options may cause performance degradation. These options are disabled by default.
 - **Use quick page counting for PDF documents** – Enables optimized page counting for PDF jobs. When this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
 - **Count pages** – Performs a page count on all documents received by this source.
 - **Detect data type** – Detects the data type on all documents received by this source. The data type will display in the Documents grid **Data Type** column.
 - **Detect trays** – Determines the document paper tray that will print the document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Administration **Configure Columns Utility**. You will need to configure the **Document columns** tab.
 - **Detect color** – Detects if the documents received by this source contain color. The Documents grid **Color** column displays True or False depending if color is detected.
 - **Detect duplex** – Detects if the documents received by this source are configured for duplex printing (that is, printing on both sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.

- d. Select the file store that will be used for all documents received by this source as they enter the EOM Console. The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.
 - e. Assign a document folder for all documents received by this source as they enter the EOM Console. The default document folder is **Un-Filed Documents**.
 - f. Select the printing cost per page for black and white and color documents.
 - g. Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state. The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
9. On the **Output settings** tab, configure the following output settings.
 - a. Use the **Schedule output** option to specify the date and time all documents received by this source will print. You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.
 - b. Use the **Route to destination** option to specify a destination where all documents received by this source can be routed. Click the Browse button to select one or more destinations in the tree. Use the SHIFT and CTRL keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.
 - c. To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.
 - d. Select the appropriate output process. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
 - e. Select the appropriate failover profile. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
 10. Click **OK**.

To receive documents from a Windows queue

Complete the following steps to create Windows queue sources. Documents received by this source will be routed to Barr EOM.

1. From the Sources tree, select the source group (folder) where you want to add sources. Right-click and select **New Source**. The **Add Source** dialog box is displayed.
2. In the **Type** list, select **Windows Queue**.
3. Next to **Add new devices** enter the number of sources you want to create. You can create a single Windows Queue source or create multiple Windows Queue sources and configure them simultaneously.
4. Click **OK**. The configuration tab pages that display are shown differently depending if you chose to create a single source or multiple sources.
 - **Single source configuration** – Configuration options are listed on the tab pages.
 - **Multiple source configuration** – Sources are configured in grid format on each tab page. The sources you chose to create are displayed as rows in the grids. The configuration options are listed as the column headings.

You will need to configure the options for each source row. You can use the Series Fill button to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog. The series will start with the first selected row.

You can add and remove sources by clicking **Add** and **Remove** below the grid. You can also select sources and click **Copy** to create copies.
5. Configure the general settings. For multiple source configuration, this is configured on the **General** tab.
 - a. Enter the source **Name**.
 - b. In the **Server** list, click the Barr EOM server where the Barr EOM Input Service is located for this source. The source does not have to be on the same server as the Barr EOM Input Service.
 - c. Enter any **Comments** or **Location** information for the source.
 - d. If desired, you can change the large source image that displays when configuring a single source. To do so, click **Select Image** and choose the appropriate image file (.bmp, .jpg, or .png). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that is displayed or the image that is displayed in the source tree. To return the image to its default size, click **Reset Image**.

6. From the **Windows queue settings** tab configure the following.
 - a. Select the **Converted queue**. The list displays all of the Windows printers that are using the Barr port monitor, but have not had a source created and associated with it. Once a source has been created and associated, those printers will be removed from the list.
 - b. Select the **Source Capabilities Profile**. This specifies which print preferences/document properties are supported by this source. Those preferences are stored in a source property profile. Click the arrow to select an existing profile, or click the Browse button to create and manage profiles from the **Manage Source Properties Profiles** dialog box.
7. On the **Document properties** tab, configure the document properties that will be applied to all documents received by the source.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

- To use advanced document properties, select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the “Configuring document property profiles” Help topic.
- If you do not want to use advanced document properties, leave the check box disabled and configure the following:
 - Select the **Document owner**. This user will be the owner of all documents received using this source. Click the Browse button to select a user.
 - Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value.

This can only be configured during single source configuration.

8. On the **More settings** tab, configure the following settings.
 - a. Determine if you want all documents received by this source to be in the **Hold** state as they enter the EOM Console. This option is disabled by default.
 - b. Determine if you want to disable business rule processing for all documents received by this source as they enter the EOM Console. This option is disabled by default.

- c. Use the following options to determine if you want to analyze documents as they are received by a source and enter the EOM Console. Selecting these options may cause performance degradation. These options are disabled by default.
 - **Use quick page counting for PDF documents** – Enables optimized page counting for PDF jobs. When this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
 - **Count pages** – Performs a page count on all documents received by this source.
 - **Detect data type** – Detects the data type on all documents received by this source. The data type will display in the Documents grid **Data Type** column.
 - **Detect trays** – Determines the document paper tray that will print the document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Administration **Configure Columns Utility**. You will need to configure the **Document columns** tab.
 - **Detect color** – Detects if the documents received by this source contain color. The Documents grid **Color** column displays True or False depending if color is detected.
 - **Detect duplex** – Detects if the documents received by this source are configured for duplex printing (that is, printing on both sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.
- d. Select the file store that will be used for all documents received by this source as they enter the EOM Console. The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.
- e. Assign a document folder for all documents received by this source as they enter the EOM Console. The default document folder is **Un-Filed Documents**.
- f. Select the printing cost per page for black and white and color documents.
- g. Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state. The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.

9. On the **Output settings** tab, configure the following output settings.
 - a. Use the **Schedule output** option to specify the date and time all documents received by this source will print. You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.
 - b. Use the **Route to destination** option to specify a destination where all documents received by this source can be routed. Click the Browse button to select one or more destinations in the tree. Use the SHIFT and CTRL keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.
 - c. To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.
 - d. Select the appropriate output process. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PjL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
 - e. Select the appropriate failover profile. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the Browse button.
10. Click **OK**.

Import sources

Use the following procedure to import a list of sources into Barr EOM. This is particularly useful if you have a database, spreadsheet, etc. that lists your existing equipment. You can save that document as a .csv file and then import it to create matching sources in Barr EOM.

Before you begin, review the following information on configuring/importing .csv files:

- In the .csv file, the header record (first record) determines which fields are defined. You must configure the field names in the header record to match predefined Barr EOM names. Field names that match are used to populate the settings associated with that column. Field names that do not match are ignored. Contact Barr Systems Technical Support for the list of predefined Barr EOM names.
- Each record after the header record is created as a device. The device will contain the settings from the recognized columns for that record. Barr EOM interprets values for text and numeric settings. For settings that have a fixed list of options, Barr EOM matches the value to the name of the option. Values which are not recognized, out of bounds, or otherwise invalid are replaced with the default value for that setting.
- Not all settings can be specified through the .csv file. For example, the input/output server, users, destinations, and profiles cannot be imported.
- A single .csv file can be used to generate multiple device types, sources, and destinations. Barr EOM only imports the settings which are recognized by the device type you are creating. For example, the .csv file can contain settings that are common to all devices types, settings for a particular device type, or settings for several different device types.

Complete the following steps to import sources from a .csv file.

1. From the Sources tree, right-click a source group (folder) and select **New Source**. The new sources will be created in this group.
2. From the **Add Source** dialog box, select the source **Type**. The available source types are Email, EOM, FTP, LPD, Network Folder, Socket, Web upload, WebPrint, WebSphere MQ, and Windows queue.
3. Select **Import devices from configuration (.CSV) file**.
4. In the box, enter the path and file name of the configuration file or click the Browse (...) button to navigate to the file.
5. When the configuration file is selected, click **OK**. Tab pages will display with options specific to the selected source type.
6. Make the necessary changes on each tab. For instructions specific to each source type, review the following sections:
 - To receive documents from an email address
 - To receive documents from another Barr EOM
 - To receive documents from an FTP connection

- To receive documents from an LPD connection
- To receive documents from a network folder
- To receive documents from a socket connection
- To receive documents from a web upload source
- To receive messages from WebSphere MQ
- To receive documents from a Windows queue

Configure security for sources

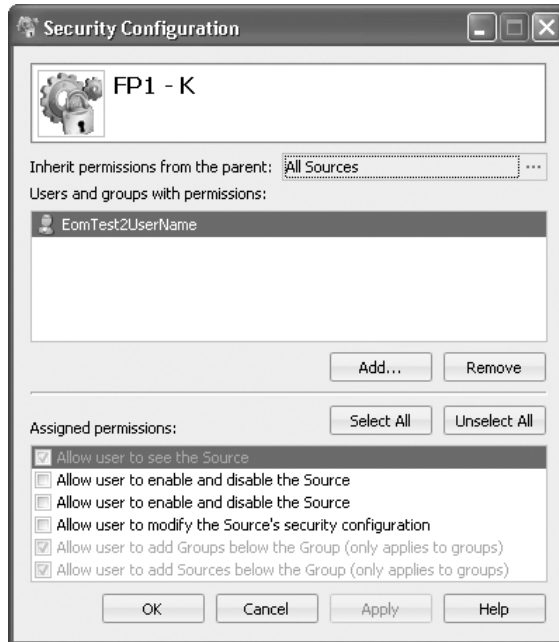
EOM security for the Sources application begins at the root of the Sources tree, the All Sources group. The Sources tree consists of sources and source groups. A source is an input into Barr EOM. A source group is a way to organize sources. EOM security is provided for both by adding a Microsoft Windows user or user group to the source or source group and assigning permissions to that user or user group. These EOM permissions define the type of access users and user groups have to the sources and source groups. Once the EOM security (Microsoft Windows users, user groups, and source permissions) is set in a source group, the EOM security is inherited by all the objects in that source group. When a new source or source group is created, its security is automatically the same as its parent source group's security (that is, the new source inherits its security from its parent source group).



To begin configuring source security, assign the desired source permissions for the All Sources group. To view sources in the tree, users or user groups must be assigned the **Allow user to view the Source** permission in the All Sources group. Users not assigned this permission in the All Sources group will not see any sources or groups even though they may have been given permissions for the specific source or group.

Complete the following steps to assign permissions for the selected source.

1. From the EOM Console, select the **Sources** application in the navigation pane.
2. In the Sources tree, right-click a source or source group and select **Security**. The **Security Configuration** dialog box is displayed. To access this dialog box, you must be a member of the local Administrators group or be assigned the **Allow user to modify the Source's security configuration** permission. Users with these rights can add and remove users or groups and can modify the assigned permissions.



3. Use the **Inherit permissions from the parent** field to determine whether you want to inherit permissions from a parent group or remove inheritance. By default, sources are configured to inherit permissions from the parent folder. Click the Browse button to select a new parent group for inheritance or to remove inheritance.



It is a good practice to assign rights using inheritance because it makes it easy for administrators to assign and manage permissions. Blocking inheritance is useful when a source or source group needs to be seen by just a few users. If you plan to block inheritance, make sure that the users that need access to the blocked source or group are in the security settings for all of its parent groups, including All Sources; if this is not done, those users will not be able to see the source. Also, remember to remove the users and user groups that you do not want to access the source or group.

4. From the **Users and groups with permissions** list box, select the appropriate user or group in the list. The **Assigned permissions** list box will display the assigned permissions for the selected user.

If you want to set permissions for a user or group that does not appear in the list, click **Add**. From the **User and Group Selection** dialog box, select the users or groups that you want to add and click **OK**. If a particular user or group is not listed, click **More Users** to locate the user. From the drop-down list, you can choose to add EOM users, LDAP users, or Windows users. You can also choose to import LDAP users. See the “Add users and groups to Barr EOM” section for detailed procedures on adding users. Once users are added, they are placed in the EOM database, which ensures that they are always listed in the future.

5. From the **Assigned permissions** box, select or clear the permissions for the selected user or group. Click **Select All** or **Unselect All** to easily assign or remove all permissions. The permissions assigned to a source group will be inherited by all of the objects contained in that group, except for the ones that have inheritance blocked.

If you notice permissions that are selected and disabled, then the user or group selected has inherited permissions. Inherited permissions cannot be removed. To remove inherited permissions, you must first block inheritance for the source.

6. Once all of your permission changes are complete, click **OK**.

Configure columns for sources

From the Administration application, administrators can configure the columns that will be displayed by default in the Sources grid. Users can add, remove, and reorder columns as necessary from the Sources grid.

Follow these steps to configure columns for sources.

1. From the navigation pane, select the **Administration** application.
2. In the navigation pane, click **Configure Columns**.
3. In the console window, select the **Source columns** tab. All of the columns that are currently displayed in the Sources grid are listed. Use the following procedures to configure columns.
 - To add columns, click the **Add** button and select columns from the **Add Column** dialog box. Make sure that you select the appropriate check boxes for the new column.
 - To remove columns, select a row and click **Remove**.
 - To reorder columns, select a row and click **Move Up** or **Move Down**.
 - To change the display name, click the appropriate cell in the **Display Name** column and enter the new name. Cells with a gray background cannot be edited.

- Use the **Visible in Grid** and **Editable in Grid** columns to specify whether the column will be displayed in the Sources grid and whether it will be editable. Cells with a gray background cannot be edited.
 - Use the **Visible in Rules** and **Editable in Rules** columns to specify whether the column will be available and editable from the Business Rules Manager. Cells with a gray background cannot be edited.
4. Click **Apply** to apply and save column changes.

Manage sources

Documents are received into Barr EOM using sources. Once received into Barr EOM, documents are then routed to destinations. You can control sources from the EOM Console using the following procedures.

To enable a source

- From the Sources grid, right-click a source and select **Enable**.
- From the Sources tree, right-click a source and select **Enable**.

To disable a source

- From the Sources grid, right-click a source and select **Disable**.
- From the Sources tree, right-click a source and select **Disable**.

To open a source

- From the Sources tree, click a source. The source will open in the current tab.
- From the Sources tree, right-click a source and select **Open**. The source will open in the current tab.
- From the Sources tree, right-click a source and select **Open in New Tab**. The source will open in a new tab.

To search for sources

You can search for sources from the Sources tree and Sources grid.

From the Sources tree

In the Search box below the tree, type the text you want to find and press ENTER or click the search button. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to move to the previous occurrence and move to the next occurrence.

From the Sources grid:

In the search box below the grid, type the text you want to find, click the column in the grid you want to search, and press ENTER or click the Search image. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to stop searching, move to the previous occurrence, and move to the next occurrence.

To move a source

Sources can be organized into source groups. Once groups are created, sources and groups can be easily moved in the tree as necessary. Complete the following steps to move a source in the EOM Console.

1. From the Sources tree, select the source or source group you want to move.
2. Use the drag-and-drop operation to place the item in the desired tree location. As you drag the item, a yellow arrow will appear to the left of the tree to indicate where the item will be placed.

To rename a source

1. From the Sources tree, right-click a source and select **Rename**.
2. In the edit field, type the new source name and press ENTER. To cancel the new name, press ESC.

To copy a source

Sources can be copied into multiple source groups. Complete the following steps to copy a source in the EOM Console.

1. From the Sources tree, select the source you want to copy and hold down the CTRL key.
2. While pressing CTRL, use the drag-and-drop operation to place the source in the desired tree location. As you drag the item, a yellow arrow will appear to the left of the tree to indicate where the copy will be created.

To delete a source

1. From the Sources tree, right-click the source you want to delete.
2. Select **Delete** from the menu.

To view all messages for a source

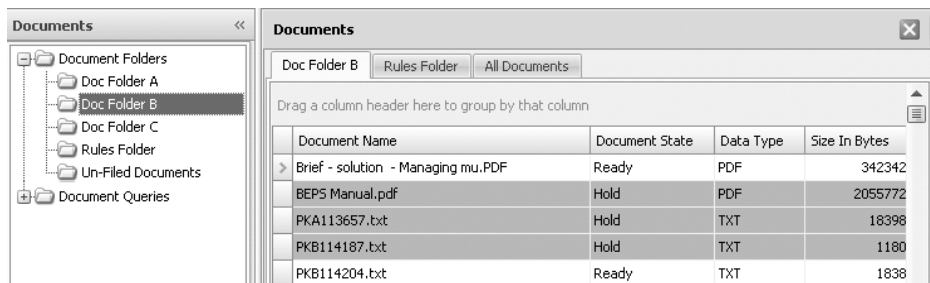
In the Sources grid, right-click a source and select **View Messages**. The **Message Console** will display listing all messages related to the selected source.

3.7 Work with documents

This chapter focuses on working with documents in the Documents application and the Library application. From the EOM Console, you can manage the flow of documents from Barr EOM to a destination. Barr EOM supports a variety of document types, such as PCL, PS, PDF, Text, TIFF, JPG, PGN, AFP, IPDS, and LCDS. The system also supports the transformation of documents between these print description languages (PDLs).

Learn about the Documents application

The Documents application is used to manage the flow of documents in Barr EOM. In the navigation pane, click the **Documents** button to open the Documents application. The navigation pane displays a configurable Documents tree showing all of the document folders and saved document queries. From the tree, you can create document folders for organizing documents. Under the Document Queries folder, you can also create queries to quickly locate documents based on their properties and query folders for organizing queries. Document folders, query folders, and queries can be moved using drag-and-drop functionality.



Navigation pane options

When you right-click an item in the navigation pane, the following options are displayed. The options listed vary, depending on whether you select a document folder, query folder, or document query.

Navigation Pane Option	Explanation
Open	Displays a grid view of the selected item. If a document folder is selected, all of the documents contained in the folder will be listed. If a document query is selected, all of the documents that meet the criteria of the query will be listed.
Open in New Tab	Opens the document folder or document query in a new tab.

Navigation Pane Option	Explanation
New Folder	Creates a new document folder or query folder in the selected folder. A new folder entry titled "UnNamed" will appear in the tree. Type the new folder name and press ENTER to create the folder. By default the new folder will inherit the security settings of its parent folder.
New Query	Creates a new document query in the selected query folder. This option displays the Document Query Tool dialog box.
Rename	Renames the selected folder.
Delete	Deletes the selected folder or query. Folders cannot be deleted if they contain any documents, queries, or subfolders.
Security	Opens the Security Configuration dialog box so that you can update the security settings. This option will define the type of access that users and groups have to the documents either contained in the folder or that meet the query criteria.

The console window displays a tabbed view of the Documents tree selection. When a document folder is selected in the tree, the Documents grid displays a listing of all of the documents in the folder. Retained documents will appear in a blue shaded row. When a query is selected in the tree, the Documents grid lists all of the documents with properties that match the query. Notice that the console window is in a tab page control. By default, navigating in the tree replaces the information in the active tab. Document queries can be opened in a new tab, by right-clicking a query in the tree and selecting **Open in New Tab**. Your tree selection, open tab pages, and console window settings will be saved for the next time that you open the application.

Grid right-click options

When you right-click a document in the grid, the following options are displayed.

Grid Option	Explanation
View	The submenu options that are displayed vary, depending on the type of document selected: EOM Viewer – Displays the selected document in the EOM Viewer. Windows Default Viewer – Opens the application installed in Windows that Windows has assigned to open that file type.
Properties	Displays the properties for the selected documents. You can edit the document properties from the Document Properties dialog box.

Grid Option	Explanation
Delete	Deletes the selected document from Barr EOM.
Hold	Sets the state of the selected document to Hold . The document cannot be routed.
Ready	Sets the state of the selected document to Ready . The document is ready to be routed.
Reprint	Reprints the selected document at a scheduled time. You can choose to reprint the document using the original page range, clear the current page range and print the entire document, or reprint the document with a new page range.
Restore	Restores the selected retained document to an active status. The document can now be automatically routed to a destination.
Route to Destination	Sends the selected document to the destination of your choice. You can select one or more destinations in the tree.
Assign to Document Folder	Sets the location in which the document will reside in Barr EOM. A dialog box is displayed that lists all of the document folders.
Assign Profiles	Assign Failover Profile – Assigns a failover profile to documents. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they aren't able to receive documents). Assign Library Filing Profile – Assigns a library filing profile for sending documents to the document library. You will specify the library folder where documents will be sent, the file store, any notifications, and how long to keep documents before deleting. Assign Notification Profile – Assigns a notification profile to documents. This will send notifications when specific events occur in the document life cycle. Assign Output Process – Assigns an output process to documents. Output processes are used to modify document data while sending a document to a destination.
Billing Accounts	Under construction
Package Management	Manages document grouping (or association with one another) for purposes of merging, zipping, or routing as a group. The Package Manager is displayed.

Grid Option	Explanation
Run Adhoc Action	Configures and performs ad hoc rule actions on one or more selected documents. These actions have no associated rule or conditions. The configured action is performed against the documents unconditionally. You can configure the following actions. Create Package – Configures a package of documents. The Create Package dialog box is displayed. Zip Package – Zips the merged document or any other documents in Barr EOM. The Zip Package dialog box is displayed. Merge Package – Configures the document properties of the merged file. The Merge Package dialog box is displayed.
Run Adhoc Rule	Allows you to run any of the rules listed in the submenu. Only rules with the Allowed for document right click option selected on the AdHoc Rule dialog box are displayed.
View messages	Displays all messages related to the selected document in the Message Console.
Schedule	Schedules the selected document to print on the day and time of your choice.
Set Retain Period	Assigns a retain period to documents. Retain periods determine how long documents will be retained.
Filters	Save Applied Filter – Saves the applied document filter. The Document Filters dialog box is displayed. You can apply saved filters by right-clicking the grid and selecting Filters Load Filter. Load Filter – Opens the Document Filters dialog box for selecting a saved filter. Create New Filter – Creates a new filter for the grid. This choice displays the Filter Builder dialog box.

Grid Option	Explanation
Queries	Edit Query – Opens the Document Query Tool so that you can modify the current query. Load Query – Opens the Document Queries dialog box for selecting a saved query. Create New Query – Opens the Document Query Tool for creating a new query. Save Current Query – Saves the current query. The Document Queries dialog box is displayed. You can apply saved queries by right-clicking the grid and selecting Queries Load Query.
Layouts	Layout files are saved for the logged in user. You will only have access to load and delete the layout files you create. Delete layout – Allows for deleting layout files created by the current user. The Delete Layout dialog box is displayed. Load layout – Allows for loading layout files created by the current user. The Load Layout dialog box is displayed. Reset layout – Abandons any unsaved grid changes and resets the grid to the default settings. The default settings for the Documents application are configured in the Configure Document Properties Utility. The default settings for the Library application are configured in the Configure Columns Utility. Save layout – Saves the current grid settings to a layout file for the current user. The Save Layout dialog box is displayed.

Grid status bar options

The following are the options that display in the status bar below the grid.

Status bar options	Explanation
Search	Searches the grid. To search, type the text you want to find and press ENTER or click the Search image. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to stop searching, move to the previous occurrence, and move to the next occurrence.
Print button	Prints the contents of the grid.
Query button	Displays the query tool for creating a custom query.

Status bar options	Explanation
Refresh Query button	Refreshes the current query.
Cancel Query Mode button	Cancels the current query.
Paging buttons	Allows for paging through the grid. Click the double left arrow button (<<) to go to the first page, the left arrow button (<) to go to the previous page, the right arrow button (>) to go to the next page, and the double right arrow button (>>) to go to the last page.
Number of Records	Displays the number of records in the grid.

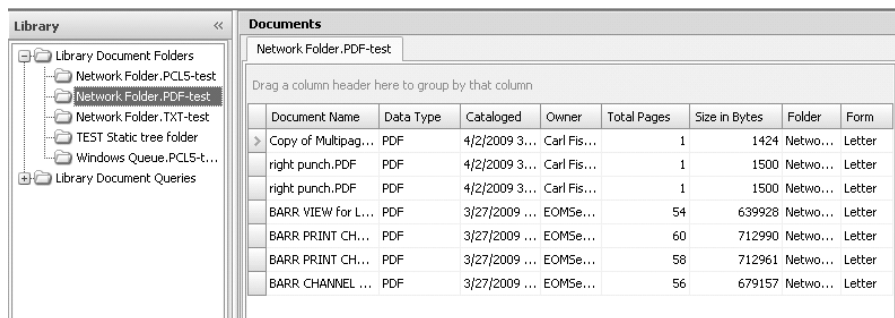
Document states

The following table lists the possible document states.

Document State	Explanation
Hold	The document cannot be routed to a destination.
Ready	The document is ready to be routed. The document will begin printing when its routing criteria matches that of a destination and it is the next document in the queue.
Incomplete	The document is being received into a source and is going through a transformation (for example, page count), being scheduled, or is both being transformed and scheduled. It will remain in this state until the transform, scheduling, or both is completed.
Error	The document cannot be successfully routed to a destination. The destination might be disabled or unavailable.
Busy	The document has begun printing to a destination but will remain in this state until printing is completed.
Retry Pending	The document has been routed to a destination. If a failover profile has been configured, the document will continue to retry routing to this destination based on the failover criteria.
Scheduled	The document is scheduled to be sent to a destination.

Learn about the Library application

The Library application supports the long-term storage of documents that have been received into Barr EOM. Based on user permissions, library documents can be viewed, reprinted, and so on. Documents are placed in the Library by sending them to the EOM Document Library destination that was created by default for you. Documents are assigned to library folders in a dynamic manner using a library filing profile. The filing profile can be assigned by the EOM Document Library destination or business rules.



In the navigation pane, click the **Library** button to open the Library application. The navigation pane displays a configurable Library tree showing all of the library document folders and saved queries. From the tree, you can create library folders for organizing library documents. In the **Library Document Queries** folder, you can also create queries for quickly locating documents based on their properties and query folders for organizing queries. Library folders, query folders, and queries can be moved using drag-and-drop functionality.

When you right-click an item in the navigation pane, the following options are displayed. The options listed vary, depending on whether a library folder, query folder, or query is selected.

Navigation Pane Option	Explanation
Open	Displays a grid view of the selected item. If a library folder is selected, all of the documents contained in the folder are listed. If a query is selected, all of the documents that meet the criteria of the query are listed.
Open in New Tab	Opens the library folder or query in a new tab.
New Folder	Creates a new library folder or query folder under the selected folder. A new folder entry titled "UnNamed" appears in the tree. Type the new folder name and press ENTER to create the folder. By default the new folder inherits the security settings of its parent folder.

Navigation Pane Option	Explanation
New Query	Creates a new query in the selected query folder. This option displays the Build New Library Query dialog box.
Rename	Renames the selected folder.
Delete	Deletes the selected folder or query. Folders cannot be deleted if they contain any documents, queries, or subfolders.
Security	Opens the Security Configuration dialog box so that you can update the security settings. This option defines the type of access that users and groups have to the documents either contained in the folder or that meet the query criteria.

The console window displays a tabbed view of the Library tree selection. When a library folder is selected in the tree, the Library grid displays a listing of all of the documents in the folder. When a query is selected in the tree, the Library grid lists all of the documents with properties that match the query. Notice that the Library grid is in a tab page control. By default, navigating in the tree replaces the information in the active tab. Queries can be opened in a new tab by right-clicking a query in the tree and selecting **Open in New Tab**. Your tree selection, open tab pages, and console window settings will be saved for the next time you open the application.

When you right-click a document in the grid, the following options are displayed.

Grid Option	Explanation
View	The submenu options that are displayed vary, depending on the type of document selected: EOM Viewer – Displays the selected document in the EOM Viewer. Windows Default Viewer – Opens the application installed in Windows that Windows has assigned to open that file type.
Delete	Deletes the selected document from Barr EOM.
Assign to Library Folder	Sets the location for the document in the Library. A dialog box lists all of the library folders.

Grid Option	Explanation
Queries	Edit Query – Opens the Document Query Tool so that you can modify the current query. Load Query – Opens the Document Queries dialog box so that you can select a saved query. Create New Query – Opens the Document Query Tool so that you can create a new query. Save Current Query – Saves the current query. The Document Queries dialog box is displayed. You can apply saved queries by right-clicking the grid and selecting Queries Load Query.
Save Grid Layout	Saves the current grid settings in a layout file for the logged-in user. This layout file is used to configure the Documents grid when a new console window is opened for this user. There is only one saved layout file per user, so no selection is required.
Reset Grid Layout	Abandons any unsaved grid changes and resets the grid to the default settings.

Manage document folders

In both the Documents and Library application, documents are organized in folders. These folders define the permissions that users and groups have for documents.

To create document folders

1. From the Documents or Library tree, right-click a document folder and select **New Folder**. A new folder titled “**UnNamed**” is added to the selected document folder.
2. In the edit field, type the name of the new folder and press ENTER. The new folder automatically inherits the permissions of the parent folder.

To move document folders

1. From the Documents or Library tree, select the document folder that you want to move.
2. Use the drag-and-drop operation to place the folder in the desired tree location. As you drag the item, a yellow arrow will appear to the left of the tree to indicate where the folder will be placed.

To rename document folders

1. From the Documents or Library tree, right-click a document folder select **Rename**.
2. In the edit field, type the new folder name and press ENTER. To cancel the new name, press ESC.

To delete document folders

From the Documents or Library tree, right-click the document folder you want to delete and select **Delete**. Note that all of the objects must be removed before the folder can be deleted.

To search for document folders

1. In the search box below the Documents or Library tree, type the text you want to find. Press ENTER or click the Search image. Barr EOM will start at the top of the tree and search for the text. Each time the text is found the selected item will be highlighted in the tree and the item will open in the console window.
2. If more than one search result is found, click the next and previous arrow buttons that appear in the search panel to go to a specific result.

Configure security for documents

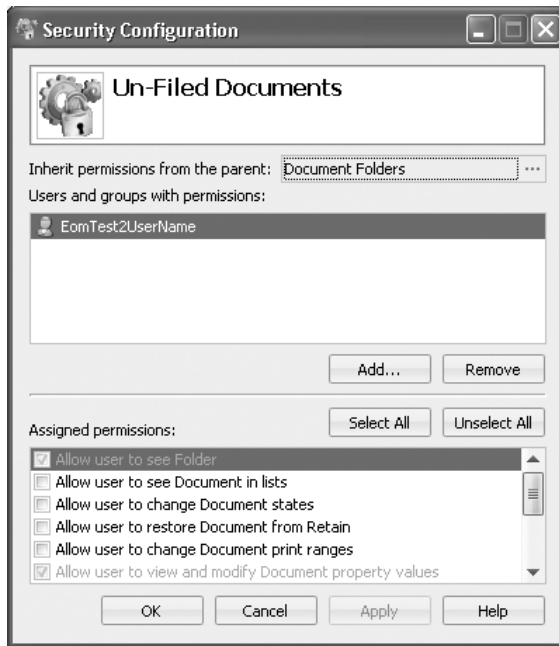
EOM security for the Documents and Library application begins at the root of the tree, the Document Folders or Library Document Folders group. The Documents and Library trees consist of folders that are used to organize documents. EOM security is provided by adding a Microsoft Windows user or user group to the folder and assigning permissions to that user or user group. These EOM permissions define the type of access that users and user groups have to the documents within the folders. Once the EOM security (Microsoft Windows users, user groups, and document permissions) is set in a folder, the EOM security is inherited by all the objects in that folder. When a new document is added or a folder is created, its security is automatically the same as its parent folder's security (that is, the new document inherits its security from its parent folder).



To begin configuring document security, assign the desired document permissions in the Document Folders or Library Document Folders. To view documents in the grid, users or user groups must be assigned the **Allow user to see Documents in list** permission in the Document Folders or Library Document Folders. Users not assigned this permission in that folder will not see any documents or folders even though they may have permissions for the specific folder.

Complete the following steps to assign permissions for the selected document folder.

1. From the EOM Console, select the **Documents** or **Library** application in the navigation pane.
2. In the tree, right-click the document folder you want to configure and select **Security**. The **Security Configuration** dialog box is displayed. To access this dialog box, you must be a member of the local Administrators group. Users with these rights can add and remove users or groups and modify the assigned permissions.



3. Use the **Inherit permissions from the parent** field to determine whether you want to inherit permissions from the parent folder or remove inheritance. By default, folders are configured to inherit permissions from the parent folder. Click the Browse button to configure inheritance.



It is a good practice to assign rights using inheritance because it makes it easy for administrators to assign and manage permissions. Blocking inheritance is useful when documents need to be seen by just a few users. If you plan to block inheritance, make sure that the users that need access to the blocked document folder are in the security settings for all of its parent groups, including Document Folders or Library Document Folders; if this is not done, those users will not be able to see the folder. Also, remember to remove the users and user groups that you do not want to access the folder.

4. From the **Users and groups with permissions** list box, select the appropriate user or group in the list. The **Assigned permissions** list box will display the assigned permissions for the selected user.

If you want to set permissions for a user or group that does not appear in the list, click **Add**. From the **User and Group Selection** dialog box, select the users or groups that you want to add and click **OK**. If the user or group is not listed, click **More Users** to locate the user. From the drop-down list, you can choose to add EOM users, LDAP users, or Windows users. You can also choose to import LDAP users. See the “Add users and groups to Barr EOM” section for detailed procedures on adding users. Once users are added, they are placed in the EOM database, causing them to always be listed in the future.

5. From the **Assigned permissions** box, select or clear the permissions for the selected user or group. Click **Select All** or **Unselect All** to easily assign or remove all permissions. The permissions assigned to a document folder will be inherited for all of the objects contained in that folder, except for the ones that have inheritance blocked.

If you notice permissions that are selected and disabled, then the user or group selected has inherited permissions. Inherited permissions cannot be removed. To remove inherited permissions, you must first turn off inheritance for the document folder.

6. Once all of your permission changes are complete, click **OK**.

Configure columns for documents

From the Administration application administrators can configure the columns that will be displayed by default in the Documents and Library grids. Users can add, remove, and reorder columns as necessary from the Documents and Library grids.

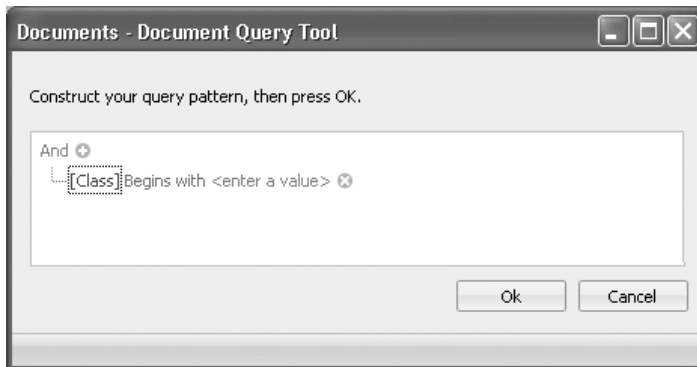
1. From the navigation pane, select the **Administration** application.
2. In the navigation pane, click **Configure Columns**.
3. In the console window, select the **Document columns** or **Library columns** tab. All of the columns that are currently displayed in the grid are listed. Use the following procedures to configure document columns.
 - To add columns, click the **Add** button and select columns from the **Add Column** dialog box. Make sure that you select the appropriate check boxes for the new column.
 - To remove columns, select a row and click **Remove**.
 - To reorder columns, select a row and click **Move Up** or **Move Down**.
 - To change the display name, click the appropriate cell in the **Display Name** column and enter the new name. Cells with a gray background cannot be edited.
 - Use the **Visible in Grid** and **Editable in Grid** columns to specify whether the column will be displayed in the Documents or Library grid and whether it will be editable. Cells with a gray background cannot be edited.
 - Use the **Visible in Rules** and **Editable in Rules** columns to specify whether the column will be available and editable from the Business Rules Manager. Cells with a gray background cannot be edited.
4. Click **Apply** to apply and save column changes.

Create document queries

You can use the Documents and Library applications to create document queries. Queries are used to quickly locate documents based on the properties. Queries can be run from the Documents and Library tree and grid. They can be run for immediate use or saved for future use.

All of the EOM Console grid views are customizable, so that you can choose the columns that are displayed, determine the sort order, and group by columns. Refer to Section 3.4, “Configure EOM Console grid views,” for step-by-step instructions about configuring the grid views.

1. Open the **Document Query Tool** using one of the following methods:
 - In the Documents or Library tree, right-click one of the document query folders and select **New Query**. The new query will be created in the selected folder.
 - Right-click in the grid and select Queries | **Create New Query**.
 - From the grid, click the queries button (Q) below the grid. If a query is currently applied to the grid, the query statements will be listed.
2. To create a query statement, click the plus button (+) next to the AND operator. To select the column, click the column name link in the condition and select the appropriate column from the list. All available columns will be displayed in the list.



3. Click the operator link in the condition and select the appropriate comparison operator from the list. The comparison operator list displays only the operators supported by the current column's data type. For example, the Priority column is of the numeric type, so the operator list does not display the “Begins with” operator and other operators that are related to the string type.
4. Click the **<enter a value>** link and enter a value in the box.
5. To add additional conditions, click the plus button (+) next to the group's AND operator. A new condition will be created below the current condition. Complete each condition statement using steps 3 – 4.

6. Click **OK** to query data using the created query statement.



You can create more advanced queries containing multiple logical (Boolean) operators. To change the root logical operator, click the current AND operator and select the appropriate operator from the list. You can then add a new query statement group by clicking the operator and selecting **Add Group**. You can add multiple groups containing multiple conditions. Complete each group using steps 2 – 5.

7. If you created the query from the grid, you can save the query by right-clicking in the grid and selecting Queries | **Save Current Query**. You will select the query folder and enter a query **Name**.
8. Review the following tips for working with queries:
 - To load saved queries, right-click in the grid and select Queries | **Load Query**. From the dialog box, select the query you want to open and click **OK**.
 - To refresh the query, click the **Refresh Query** button below the grid.
 - To cancel the query, click the **Cancel Query Mode** button below the grid.

Manage documents

From the EOM Console, you can start, stop, view, and delete documents. You can route documents to destinations and schedule documents to print at a specific time. You can control documents from the EOM Console using the following procedures.

To change the state of documents

Use the following procedure to change document states.

1. From the Documents grid, right-click the document you want to change.
2. Select one of the following state options from the menu:
 - **Hold** – Sets the state of the selected document to **Hold**. The document cannot be routed.
 - **Ready** – Sets the state of the selected document to **Ready**. The document is ready to be routed.

To view documents

Use the following procedure to view documents.

1. From the Documents grid, right-click the document you want to view.
2. Select **View** and then select the appropriate submenu viewing option. The available options vary depending on the type of document selected.

To route to a destination

Use the following procedure to manually route documents to destinations.

1. From the Documents grid, right-click a document and select **Route to destination**.
2. From the dialog box that displays, select one or more destinations in the tree. Use the SHIFT and CTRL keys to select multiple destinations. To quickly locate a destination, you can search using the search box below tree. The destination icon in the tree will indicate if the destination is offline. The images for offline destinations are gray with a red no symbol.
3. Determine if you need to select the **Enable offline destinations** check box. If you route a document to a destination that is offline, selecting this option will automatically bring the destination online to receive the document.
4. Click **OK**.

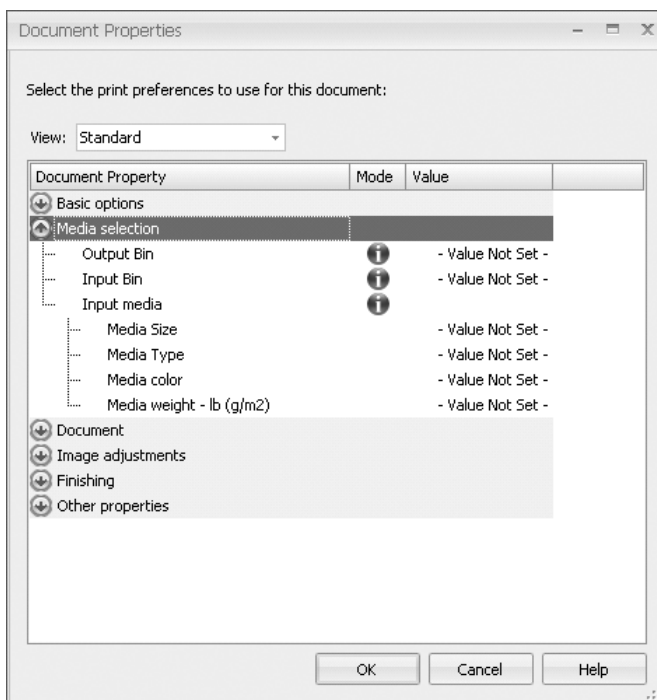
To search for documents

Complete the following steps to search for documents in the Documents grid. You can also search the Documents grids that appear in the Destinations and Sources applications.

1. In the Documents or Library tree, select the appropriate document folder.
2. you want to find, click the column in the grid you want to search, and press ENTER or click the Search image. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to stop searching, move to the previous occurrence, and move to the next occurrence.

To edit document properties

1. From the Documents grid, select one or more documents, right-click and select **Properties**. The **Document Properties** dialog box is displayed.



2. In the **View** list, choose the document properties/print preferences that display in the grid. You can select from the following options:
 - **All** – Displays all available document properties in the grid.
 - **Standard** – Displays only the document properties that the destination is capable of using. This is the default view.
 - **Only Set Values** – Displays only the document properties that contain a value (have been configured). This is an easy way to see the settings that are going to be applied to the document.

3. Configure the document properties in the grid. The grid lists the property values that can be configured grouped in the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.
 - a. Expand the category of the property you want to configure. The first node level in the category determines the print preferences for the properties it contains. In the **Mode** column, select how the property should be applied when a document is sent to a destination. Click in the grid cell and choose from the following options:
 - **Always Apply** – Always applies the specified property value. Barr EOM will add commands to the print stream to enforce the print preference. If the document already contains commands for that print preference, Barr EOM will modify the commands to work with the printer family where the document is being sent.
 - **Apply Conditionally** – Applies the property value conditionally. Barr EOM will only add or modify commands for the print preference when the printer family that the document is destined for is different from the printer family the document was originally designed for.
 - **Informational Only** – Barr EOM makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.
 - b. In the **Value** column, specify the document property value. You can use functions to insert and extract data as necessary. See section 3.13 “Use EOM functions” for more information.
 Only the allowed values configured in the **Configure Document Properties Utility** will be available for selection. If **(Excluded)** displays next to a value, that value was excluded by the currently assigned destination on the **Destination Capabilities** dialog box.
4. Click **OK** to save changes.

To assign document folders

Assign document folders to place specific documents in any of the document folders defined in the Documents or Library tree. Use the following procedure to manually assign documents to document folders.

1. From the Documents application, right-click a document and select **Assign to Document Folder**. From the Library application, right-click a document and select **Assign to Library Folder**.
2. From the dialog box that is displayed, select a folder and click **OK**. To quickly locate a folder, you can search using the search box below the tree.

To delete documents

From the Documents grid, right-click the document that you want to delete and select **Delete**.

To reprint documents

You can schedule documents to print at a specific time. For example, you can schedule certain jobs to print on a specific day of the week or you can schedule large jobs to print at night. Documents become eligible to print at the specified time. They might not print at the exact time, depending on how many other eligible documents are ahead of them in the queue.

Use the following procedure to reprint documents.

1. From the Documents grid, select one or more documents, right-click, and select **Reprint**. The **Reprint Document** dialog box is displayed.
2. Under **Reprint options**, determine how you want to reprint the document. You can reprint using one of the following methods.
 - Reprint the document using the original page range specified.
 - Clear the current page range and print the entire document.
 - Reprint the document by specifying a new page range. If you choose to override the current page range, the **Document page range** option becomes available for you to specify the new page range. Enter the pages to print using the following formats, without quotation marks (""). You can enter one or more page ranges using a comma to separate the values (for example, 3-6,1,18-).
 - "*n-n*" – to print a specific page range
 - "*-n*" – to print from the beginning of the document to a specific page
 - "*n-*" – to print from a specific page to the end of the document
 - "*n*" – to print a specific page
3. Click the drop-down window under **Schedule reprint time** to specify the date and time that the document will reprint.
4. Click **Submit**.

To restore documents

Documents that have been routed to a destination are considered Retained. Within the Documents grid, these records are highlighted in blue and have a document state of Hold. Use the following procedure to restore documents to their previous source.

1. From the Documents grid, right-click the document that you want to restore.
2. Select **Restore** from the menu. The document will no longer be retained. It will be restored to its previous source.

To schedule output

You can schedule documents to print at a specific day and time. For example, you can schedule certain jobs to print on a specific day of the week or you can schedule large jobs to print at night. Documents become *eligible* to print at the specified time; they might not print at the exact specified time if other eligible documents are ahead of them in the queue.

1. From the Documents grid, right-click a document and select **Schedule**.
2. From the **Schedule** dialog box, select the specific day and time to print the document.
3. Click **OK** to save the changes.

To assign a failover profile

Use the following procedure to assign a failover profile to documents. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they aren't able to receive documents).

1. From the Documents grid, select one or more documents, right-click and select Assign Profiles | **Assign Failover Profile**. The **Set Failover Profile** dialog box is displayed.
2. In the **Profile** list, select the appropriate failover profile or click **New** to create one from the **Failover Profile** dialog box. You can determine what should happen if all of the retries fail and when to place the document in an error state.

You can click **Edit** to edit the selected profile or click **Manage** to display the **Manage Failover Profiles** dialog box which lists all of the defined profiles. When managing profiles, you can create, import, and export profiles, as well as manage all existing profiles.

3. When you have selected your profile, click **OK**.

To assign a library filing profile

Use the following procedure to send documents to the document library. You will specify the library folder where documents will be sent, the file store, any notifications, and how long to keep documents before deleting.

1. From the Documents grid, select one or more documents, right-click and select Assign Profiles | **Assign Library Filing Profile**. The **Set Library Filing Profile** dialog box is displayed.
2. In the **Profile** list, select the appropriate library filing profile or click **New** to create one from the **Document Library Profile** dialog box.

Complete the following steps to configure a library profile.

- a. Click **New**. The **Document Library Profile** dialog box displays.

New Document Library Profile

Name:

Description:

File documents in the following library location:

Base folder: - Select Folder - ...

Dynamic folder levels:

Add Edit Remove Up Down

☐ Send email notification upon filing. Email...

When filing documents in the library...

☒ Leave them in their current file store.

☐ Move them to this file store:

\\kimono\NetworkBossFileStore

☒ Purge documents after 180 days.

OK Cancel Apply Help

- b. Specify the library profile **Name** and **Description**.
- c. Determine where documents will be placed in the library. You must first click the **Base folder** Browse (...) button to select an existing folder. If you want, you can then specify one or more **Dynamic folder levels** to be placed under the selected **Base folder**. To create dynamic folders, click **Add** and enter a folder name. The folder name can consist of text, one or more document properties, and functions.
 - To insert document properties, right-click in the text box and select **Insert Document Property**. Some sample document properties are date/time, document name, and data type.
 - To insert functions, right-click in the box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions.

You can add, edit, and remove folders, and change the folder order using the buttons next to the box. Each level added becomes a subfolder of the folder above it in the list.

- d. If you want to send an email notification when a document is sent to the library, select **Send email notification upon filing** and click **Email**. Configure the email setting on the **Send Email** dialog box.

- e. Specify the file store for documents sent to the library. You can choose to leave them in their current file store or move them to a specified file store.
 - f. In the **Purge documents** field, specify how long documents should stay in the library before they are deleted.
 - g. Click **OK**.
3. When you have selected your profile, click **OK**.

To assign a notification profile

Use the following procedure to assign a notification profile to documents. This will send notifications when specific events occur in the document life cycle. Notifications are sent according to defined notification profiles. Notification profiles specify which events generate notifications (document arrives, prints successfully, prints on failover destination, or is in error state), the type of notification for each event (email or pop-up), the text of notifications for each event, and who should get notified. For example, you can configure a pop-up to display after a document prints successfully.

1. From the Documents grid, select one or more documents, right-click and select Assign Profiles | **Assign Notification Profile**. The **Set Notification Profile** dialog box displays.
2. In the **Profile** list, select the appropriate notification profile or click **New** to create one from the **Notification Profile** dialog box.

Complete the following steps to configure a notification profile.

- a. Click **New**. The **Notification Profile** dialog box displays.

When the document...	Send notification via...	Notify owner	Recipients	Message
>				

- b. Specify the library profile **Name** and **Description**.
- c. If this profile will send email notifications, select the **Email profile** that will be used with those notifications. You can select an email profile from the drop-down list or click the Browse button and manage profiles from the **Manage Outbound Email Profiles** dialog box. From this dialog box, you can create and modify email profiles using the **Outbound Email Profile** dialog box.

- d. Click directly in the **Notifications** grid to configure the notifications that will be sent. You will need to configure each grid column. You can add and remove notifications (grid rows) using the **Add** and **Remove** buttons.
 - **When the document...** – Select when a notification will be sent. You can choose to send a notification when a document **Arrives, Prints Successfully, Prints on Failover Destination, or Is In Error State**.
 - **Send notification via...** – Select how the notification will be sent and displayed. You can choose to send notifications using the **Tray Client Pop-up** or as an **Email Message**.
 - **Notify owner** – Choose whether the document owner will be sent a notification.
 - **Recipients** – Click the Browse button to select who will receive the notification. You can select users and groups from the **User and Group Selection** dialog box.
 - **Message** – Enter the notification text. Click the drop-down arrow to make any text changes. You can insert document properties and functions in the body text. To insert document properties, right-click in the text box, select **Insert Document Property**, and choose the appropriate properties. Document properties will display enclosed in brackets ({}). The values of the properties will display in the notification. To insert functions, right-click in the box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions.
 - e. Click **OK**.
3. When you have selected your profile, click **OK**.

To assign an output process

Use the following procedure to assign an output process to documents. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PDL commands, inserting overlays, and so on.

1. From the Documents grid, select one or more documents, right-click and select **Assign Profiles | Assign Output Process**. The **Set Output Process** dialog box is displayed.
2. In the **Profile** list, select the appropriate output process profile or click **New** to create one using the **Process Designer**. See the “Work with output processes” Help topic for specific output process procedures.

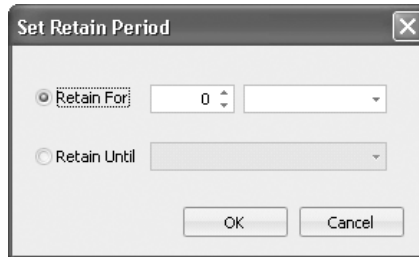
You can click **Edit** to edit the selected profile or click **Manage** to display the **Manage Output Process Profiles** dialog box, which lists all of the defined profiles. When managing profiles, you can create, import, and export profiles, as well as manage all existing profiles.

3. When you have selected your profile, click **OK**.

To assign a retain period

Use the following procedure to assign a retain period to documents. Retain periods determine how long documents will be retained.

1. From the Documents grid, select one or more documents, right-click and select **Set Retain Period**. The **Set Retain Period** dialog box is displayed..



2. Set the retain period:
 - To retain for a specified time length, use the **Retain For** options. Time periods can be specified in years, months, days, hours, and minutes.
 - To retain until a specific date and time, use the **Retain Until** options.
3. Click **OK**.

To run an ad hoc rule on documents

Use the following procedure to run ad hoc rules on documents from the Documents grid.

1. From the Documents grid, select one or more documents, right-click and select **Run Adhoc Rule**. You can run any of the rules listed in the submenu. Only rules with the **Allowed for document right click** option selected on the **AdHoc Rule dialog box** are displayed.
2. A confirmation dialog will display. Click **Yes** to run the ad hoc rule on the selected documents.

To run an ad hoc action on documents

Use one of the following procedures to configure and perform ad hoc rule actions on documents from the Documents grid. You can create a package of documents, create a zip package, or create a merge package.

Create a package of documents

Use this action to create a package of documents. This will take all of the selected documents and put them in a multiple document package.

1. From the Documents grid, select one or more documents, right-click and select **Run Adhoc Action | Create Package**. The **Create Package** dialog box is displayed.
2. Enter the **Naming prefix** for the package document. This prefix will be added to all documents in the package.
3. If you want to group documents in the package, select **Grouping property** and select the property to group by in the drop-down list.
4. In the **Ordering properties** list, select the document properties that will control the order the documents are packaged. As you select properties, they display in the **Selected order** list.



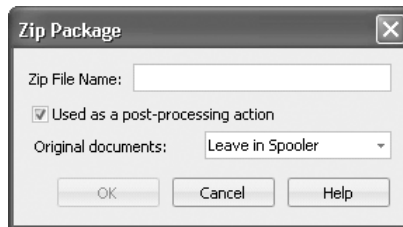
Only the allowed properties selected on the Configure Document Properties Utility will display in the **Ordering properties** list.

5. Select properties in the **Selected order** list and use the **Move up** and **Move down** buttons to configure the property order.
6. Click **OK**.

Create a zip package

Use this action to zip the selected documents.

7. From the Documents grid, select one or more documents, right-click and select **Run Adhoc Action | Zip Package**. The **Zip Package** dialog box displays.

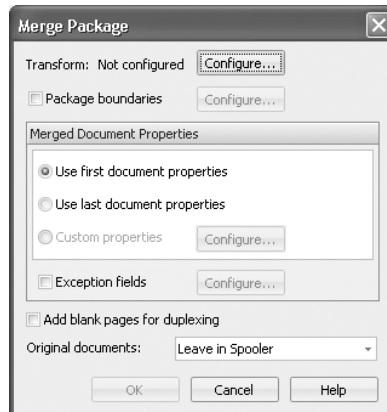


8. Enter the **Zip File Name** in the box.
9. If this rule will be used after all documents have been received into Barr EOM, select **Used as a post-processing action**.
10. Determine what will happen to the **Original documents** after the zipped file has been created. You can leave them in the spooler, move them to retain, or delete them.
11. Click **OK**.

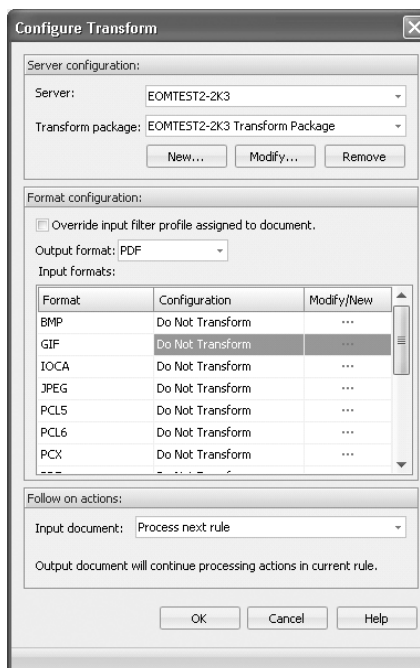
Create a merge package

Use this action to create a merged file.

- f. From the Documents grid, select one or more documents, right-click and select **Run Adhoc Action | Merge Package**. The **Merge Package** dialog box displays.

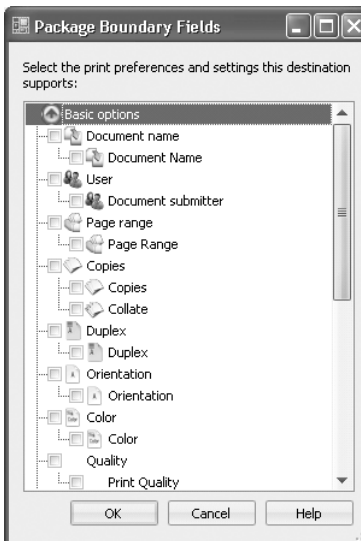


- g. Next to **Transform**, click the **Configure** button to configure the transform. The **Configure Transform** dialog box displays.



- h. In the **Server** list, click the licensed transform server that you would like to use.
- i. In the **Transform package** list, you can select an existing transform package or create one. Complete the following steps to create a transform package.
 - j. Click **New**. The **General tab** displays.
 - k. Enter the transform package **Name**.
 - l. Select a transform package **Type** of BarrEOM or DocBridge. DocBridge requires the purchase of a standalone version of the transform software and a separate license. DocBridge has more data types available.
 - m. If you select DocBridge, verify the **EXE path** is set to the correct folder. The default EXE path is @EOMTransformDir. To change the path, type in the box or click the ellipsis (...) button.
 - n. Set the **Logging State**. The logging state determines if transform logs and temp files will be saved in the document folder. By default, the **Logging State** is set to Yes. All log files should be inspected during installation and pre-production testing to insure that fonts are correctly mapped. In a production system, the logging can be disabled to save disk space. If the transform operation returns an error (return code not zero), the log and temp files will not be deleted, and are available for troubleshooting.
 - o. On the **Filter Profiles** tab, specify how the transform software will handle the formatting for each data type.
 - To configure a profile, click the ellipsis button in the **Modify/New** column for the appropriate formats. From the **Configure Filter Profile** dialog box, configure the profile as needed. The profile contains a communications and printer definition section. See the *Configuring a CpMillProfile* resource help topic for instructions on configuring a filter profile.
 - To select a profile, click in the **Configuration** column for the appropriate formats and select the profile from the list.
 - p. On the **Resources** tab, specify where the transform software will find the resources needed for the transformation. For example, PDF fonts are usually found at the location of an Adobe installation.
 - q. On the **Fonts** tab, you can control the font mapping of input fonts to output fonts. The defaults are typically correct, but may need to be adjusted for special cases. You can add or modify fonts directly in the grid.
 - r. Click **OK** to create the transform package.
- s. Use the **Override input filter profile assigned to document** checkbox option to determine if you want to override the input filter profile assigned to the document or if you want to use the filter profile configured in the transform package. Select the checkbox to use the filter profile in the transform package.
- t. In the **Output format** list, click the format of the output file.

- u. Configure the conversion of each input format in the **Input formats** grid, and then click **OK**.
 - For all unlicensed input formats and any input formats you don't want to use, click in the **Configuration** column and select **Do Not Transform**.
 - For licensed input formats, you can select **Use Default Options** or select a predefined configuration in the **Configuration** column. To configure a custom input format, click the ellipsis button in the **Modify/New** column. If **Use Default Options** or **Do Not Transform** is selected in the **Configuration** column, a new configuration will be created. If a predefined configuration is selected, that configuration will be modified. The custom transform options are configured on the **Input options** tab, **Output options** tab, and **Page Layout** tab. If BMP or PDF is selected as the output format, the **Bitmap output** tab or **PDF output** tab will also display.
 - v. When the transform configuration is complete, click **OK**. The **Merge Package** dialog box indicates the transform has been configured.
 - w. Complete the following steps to configure **Package boundaries**.
 Boundary fields are only applicable when a merged document will exceed the maximum number of exceptions (currently set at 1000). Merged documents that exceed the exception count will be split into separate documents. Boundary fields are used to control where the merged documents will be split. Each split will be on a boundary that maximizes the number of pages without exceeding the exception threshold. If you do not specify boundary fields, the split is arbitrary and will occur where the maximum number of pages can be fit.
12. Select **Package boundaries** and click **Configure**. The **Package Boundary Fields** dialog box is displayed.



13. From the grid, expand the sections to select the document properties that will be used as package boundaries.
14. Click **OK**.
- x. Under **Merged Document Properties**, determine if you want to use the document properties from the first page in the documents or the last page in the documents. Selecting custom properties is not yet available.
- y. Complete the following steps to configure **Exception fields**. Exception fields specify which document properties to preserve on a per-page basis in the merged document. The document properties will be analyzed to determine the baseline and the exceptions (page overrides).
 - z. Select **Exception fields** and click **Configure**. The **Exception Fields** dialog box is displayed.
 - aa. From the grid, expand the sections to select the document properties that will be used as exception fields.
 - bb. Click **OK**.
- cc. Determine if you need to **Add blank pages for duplexing**.
- dd. Determine what will happen to the **Original documents** after the merged file has been created. You can leave them in the spooler, move them to retain, or delete them.
- ee. Click **OK**.

To manage document packages

The Package Manager is used to manage which documents are contained in a package. “Package” is an EOM concept used as a means of grouping documents together for the purposes of routing to a destination as a group, running ad hoc rules on the group, etc. By default, each document arriving in Barr EOM will be the only document in its own package bearing the same name as the document. Use the following procedure to move documents from one package to another, remove documents from a package to be in a separate package, and create new packages.

To open the Package Manager, in the Documents list select one or more documents, right-click and select **Package Management**. The **Package Manager** is displayed. Only the packages associated with the selected documents will be available for management.

To create packages

Click **New Package**. Type the package name in the dialog that displays and click **OK**. The new package is added to the bottom of the **Packages** list.

To remove documents from packages

In the **Package documents** list, select the documents you want to remove. Click the **>** button. The documents are removed from the package and placed in the **Removed documents** list.

To add documents to packages

In the **Packages** list, select the package to which you want to add documents. In the **Removed documents** list, select the documents you want to add to the package. Click the < button. The documents are added to the selected package.

To move documents between packages using drag-and-drop functionality

In the **Package documents** list, select the documents you want to move. Using drag-and-drop functionality, place the documents in the desired package in the **Packages** list.

To view a document's history

In the Documents grid, right-click a document and select **View Messages**. The **Message Console** will display listing all messages related to the selected document.

3.8 Work with reports

The Reporting application can be accessed both through the EOM Console and the EOM Web Interface. There are several sample reports included in Barr EOM. These reports provide summary and details of activity by user, department, document, and destination. Upon clicking reports in the tree, a panel displays with parameters. These parameters can be adjusted, after which the report displays up in the right side of the screen. Summary reports include hyperlinks to detailed reports. The Report Designer is used to edit and create new reports.

Reports

Summary for Destinations

File View Background

Parameters

Start date: 7/14/2009 12:00 AM

End date: 8/14/2009 11:59 PM

Date range:

Reset Submit

Summary of Print Jobs by Destination

Destination Name	Total Documents	Total Users	Total Pages	Total Cost	Average Size (bytes)	Average Cost
Destination Name	1	1	1	\$1.00	102400	\$1.00
PrintJob1	2	2	10	\$1.00	102400	\$1.00
PrintJob2	1	1	1	\$1.00	102400	\$1.00
PrintJob3	2	2	10	\$1.00	102400	\$1.00
PrintJob4	1	1	1	\$1.00	102400	\$1.00
PrintJob5	1	1	1	\$1.00	102400	\$1.00
PrintJob6	1	1	1	\$1.00	102400	\$1.00
PrintJob7	1	1	1	\$1.00	102400	\$1.00
PrintJob8	1	1	1	\$1.00	102400	\$1.00
PrintJob9	1	1	1	\$1.00	102400	\$1.00
PrintJob10	1	1	1	\$1.00	102400	\$1.00
PrintJob11	1	1	1	\$1.00	102400	\$1.00
PrintJob12	1	1	1	\$1.00	102400	\$1.00
PrintJob13	1	1	1	\$1.00	102400	\$1.00
PrintJob14	1	1	1	\$1.00	102400	\$1.00
PrintJob15	1	1	1	\$1.00	102400	\$1.00
PrintJob16	1	1	1	\$1.00	102400	\$1.00
PrintJob17	1	1	1	\$1.00	102400	\$1.00
PrintJob18	1	1	1	\$1.00	102400	\$1.00
PrintJob19	1	1	1	\$1.00	102400	\$1.00
PrintJob20	1	1	1	\$1.00	102400	\$1.00
PrintJob21	1	1	1	\$1.00	102400	\$1.00
PrintJob22	1	1	1	\$1.00	102400	\$1.00
PrintJob23	1	1	1	\$1.00	102400	\$1.00
PrintJob24	1	1	1	\$1.00	102400	\$1.00
PrintJob25	1	1	1	\$1.00	102400	\$1.00
PrintJob26	1	1	1	\$1.00	102400	\$1.00
PrintJob27	1	1	1	\$1.00	102400	\$1.00
PrintJob28	1	1	1	\$1.00	102400	\$1.00
PrintJob29	1	1	1	\$1.00	102400	\$1.00
PrintJob30	1	1	1	\$1.00	102400	\$1.00
PrintJob31	1	1	1	\$1.00	102400	\$1.00
PrintJob32	1	1	1	\$1.00	102400	\$1.00
PrintJob33	1	1	1	\$1.00	102400	\$1.00
PrintJob34	1	1	1	\$1.00	102400	\$1.00
PrintJob35	1	1	1	\$1.00	102400	\$1.00
PrintJob36	1	1	1	\$1.00	102400	\$1.00
PrintJob37	1	1	1	\$1.00	102400	\$1.00
PrintJob38	1	1	1	\$1.00	102400	\$1.00
PrintJob39	1	1	1	\$1.00	102400	\$1.00
PrintJob40	1	1	1	\$1.00	102400	\$1.00
PrintJob41	1	1	1	\$1.00	102400	\$1.00
PrintJob42	1	1	1	\$1.00	102400	\$1.00
PrintJob43	1	1	1	\$1.00	102400	\$1.00
PrintJob44	1	1	1	\$1.00	102400	\$1.00
PrintJob45	1	1	1	\$1.00	102400	\$1.00
PrintJob46	1	1	1	\$1.00	102400	\$1.00
PrintJob47	1	1	1	\$1.00	102400	\$1.00
PrintJob48	1	1	1	\$1.00	102400	\$1.00
PrintJob49	1	1	1	\$1.00	102400	\$1.00
PrintJob50	1	1	1	\$1.00	102400	\$1.00
PrintJob51	1	1	1	\$1.00	102400	\$1.00
PrintJob52	1	1	1	\$1.00	102400	\$1.00
PrintJob53	1	1	1	\$1.00	102400	\$1.00
PrintJob54	1	1	1	\$1.00	102400	\$1.00
PrintJob55	1	1	1	\$1.00	102400	\$1.00
PrintJob56	1	1	1	\$1.00	102400	\$1.00
PrintJob57	1	1	1	\$1.00	102400	\$1.00
PrintJob58	1	1	1	\$1.00	102400	\$1.00
PrintJob59	1	1	1	\$1.00	102400	\$1.00
PrintJob60	1	1	1	\$1.00	102400	\$1.00
PrintJob61	1	1	1	\$1.00	102400	\$1.00
PrintJob62	1	1	1	\$1.00	102400	\$1.00
PrintJob63	1	1	1	\$1.00	102400	\$1.00
PrintJob64	1	1	1	\$1.00	102400	\$1.00
PrintJob65	1	1	1	\$1.00	102400	\$1.00
PrintJob66	1	1	1	\$1.00	102400	\$1.00
PrintJob67	1	1	1	\$1.00	102400	\$1.00
PrintJob68	1	1	1	\$1.00	102400	\$1.00
PrintJob69	1	1	1	\$1.00	102400	\$1.00
PrintJob70	1	1	1	\$1.00	102400	\$1.00
PrintJob71	1	1	1	\$1.00	102400	\$1.00
PrintJob72	1	1	1	\$1.00	102400	\$1.00
PrintJob73	1	1	1	\$1.00	102400	\$1.00
PrintJob74	1	1	1	\$1.00	102400	\$1.00
PrintJob75	1	1	1	\$1.00	102400	\$1.00
PrintJob76	1	1	1	\$1.00	102400	\$1.00
PrintJob77	1	1	1	\$1.00	102400	\$1.00
PrintJob78	1	1	1	\$1.00	102400	\$1.00
PrintJob79	1	1	1	\$1.00	102400	\$1.00
PrintJob80	1	1	1	\$1.00	102400	\$1.00
PrintJob81	1	1	1	\$1.00	102400	\$1.00
PrintJob82	1	1	1	\$1.00	102400	\$1.00
PrintJob83	1	1	1	\$1.00	102400	\$1.00
PrintJob84	1	1	1	\$1.00	102400	\$1.00
PrintJob85	1	1	1	\$1.00	102400	\$1.00
PrintJob86	1	1	1	\$1.00	102400	\$1.00
PrintJob87	1	1	1	\$1.00	102400	\$1.00
PrintJob88	1	1	1	\$1.00	102400	\$1.00
PrintJob89	1	1	1	\$1.00	102400	\$1.00
PrintJob90	1	1	1	\$1.00	102400	\$1.00
PrintJob91	1	1	1	\$1.00	102400	\$1.00
PrintJob92	1	1	1	\$1.00	102400	\$1.00
PrintJob93	1	1	1	\$1.00	102400	\$1.00
PrintJob94	1	1	1	\$1.00	102400	\$1.00
PrintJob95	1	1	1	\$1.00	102400	\$1.00
PrintJob96	1	1	1	\$1.00	102400	\$1.00
PrintJob97	1	1	1	\$1.00	102400	\$1.00
PrintJob98	1	1	1	\$1.00	102400	\$1.00
PrintJob99	1	1	1	\$1.00	102400	\$1.00
PrintJob100	1	1	1	\$1.00	102400	\$1.00

Page 1 of 1

Zoom Factor: 50%

Navigation pane

When you right-click an item in the navigation pane, the following options are displayed. The options listed vary, depending on whether you select a report folder or a report.

Navigation Pane Option	Explanation
Open (reports only)	Opens the report in the active tab.
Open in New Tab (reports only)	Opens the report in a new tab.
New Folder (report folders only)	Creates a new report folder in the selected folder. A new folder entry titled "UnNamed" will appear in the tree. Type the new folder name and press ENTER to create the folder. By default the new folder will inherit the security settings of its parent folder.
New Report (report folders only)	Creates a new report in the selected folder. This option displays the New Report dialog box.
Rename	Renames the selected folder or report.
Copy (reports only)	Creates a copy of the selected report.
Edit (reports only)	Edits the selected report in the Report Designer .
Delete	Deletes the selected folder or report. Folders cannot be deleted if they contain reports or subfolders.
Security	Opens the Security Configuration dialog box so that you can update the security settings. This option will define the type of access that users and groups have to the either the selected report or the reports contained in the selected folder.

Report Preview window

The Report Preview window displays a tabbed view of the Reports tree selection. By default, selecting reports in the tree will replace the report in the active tab. To open a report in new tab, right-click the report and select **Open in New Tab**.

When a report is opened the **Parameters** pane displays with parameters to configure. Complete the parameters and click **Submit** to display the report in the right side of the window. Summary reports include hyperlinks to detailed reports.

Your tree selection and open tab pages will be saved for the next time you open the application.

Menu bar

The menu bar displays below the tab title. Click the following menus to learn about the available commands.

File menu

Option	Explanation
Page Setup	Allows you to change page orientation, select paper size, choose paper source, and change page margins.
Print	Displays the Print dialog for printing the active report.
Quick Print	Sends the report directly to the default printer without customizing print settings.
Export Document	Exports the active report and saves the resulting file on your hard drive. You can choose one of the following formats: PDF, HTML, MHT, RTF, Excel, CSV, text, or image. You may be prompted to define format-specific options.
Send via Email	Sends the active report via email. You can choose one of the following formats: PDF, MHT, RTF, Excel, CSV, text, or image. You may be prompted to define format-specific options.

View menu

Option	Explanation
Page Layout	Facing – Arranges the pages side by side, displaying only one or two pages at a time. Continuous – Arranges the pages in a continuous vertical column.
Toolbar	Shows or hides the toolbar.
Status bar	Shows or hides the status bar.
Customize	Allows for customizing the Report Preview window.

Background menu

Option	Explanation
Color	Changes the background of the report to a specified color.
Watermark	Adds a text or picture watermark as the background of the report.

Toolbar



The toolbar displays the following information:

Option	Explanation
Parameters	Shows or hides the Parameters pane.
Search	Displays the Find dialog for locating text in the report.
Print	Displays the Print dialog for printing the active report.
Quick Print	Sends the report directly to the default printer without customizing print settings.
Page Setup	Allows you to change the print settings using the Page Setup dialog box. You can change page orientation, select paper size, choose paper source, and change page margins.
Scale	Displays scaling options for changing the view of the report.
Hand Tool	Enables or disables the use of the Hand tool. The Hand tool enables you to scroll content by dragging the document instead of using scroll bars.
Magnifier	Enables or disables the use of the Magnifier. The Magnifier allows you to switch between 100% and "fit whole page" views. Click anywhere in the report to toggle views.
Zoom Out	Decreases the magnification of the report.
Zoom	Allows for selecting the zoom level from the drop-down list.
Zoom In	Increases magnification of the report.
First Page	Displays the first page of the report.
Previous Page	Displays the previous page of the report.
Next Page	Displays the next page of the report.
Last Page	Displays the last page of the report.
Multiple Pages	Displays options for viewing two or more pages at one time.
Color	Changes the background of the report to a specified color.

Option	Explanation
Watermark	Adds a text or picture watermark as the background of the report.
Export Document	Exports the active report and saves the resulting file on your hard drive. You can choose one of the following formats: PDF, HTML, MHT, RTF, Excel, CSV, text, or image. You may be prompted to define format-specific options.
Send via Email	Sends the active report via email. You can choose one of the following formats: PDF, MHT, RTF, Excel, CSV, text, or image. You may be prompted to define format-specific options.

Parameters pane

The Parameter pane allows you to control the data that displays in the report by changing the parameter values. The following parameters display for all reports. Additional parameters may display depending on the report selected.

- **Start date** – Specifies the start date of the report.
- **End date** – Specifies the end date of the report.
- **Date range** – Specifies a date range for the report. You can choose the last 7 days, the last 14 days, the previous month, month to date, or year to date.
- **Reset button** – Resets the parameter values to the default values.
- **Submit button** – Submits the parameter values and displays the report.

Report view

Displays the report according to the selected parameter values.

Status bar

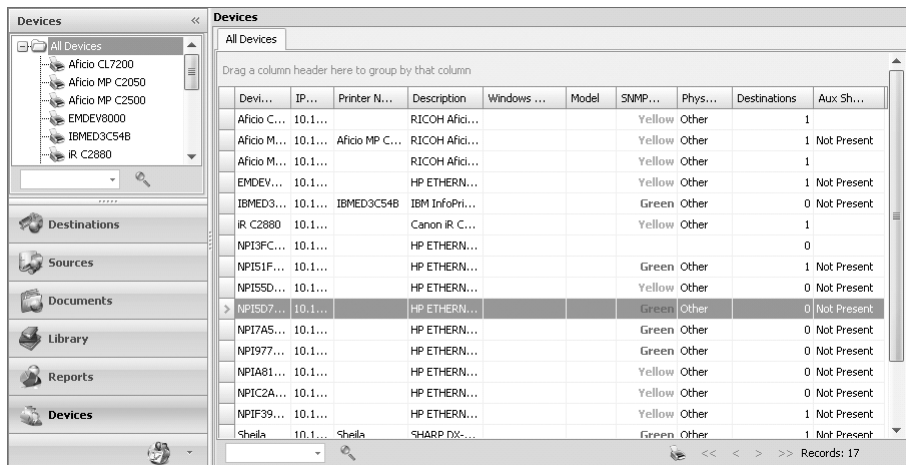
The status bar displays the following information:

- **Page *n* of *n*** – Displays the current page and the total number of pages in the report.
- **Zoom Factor** – Displays the current zoom level of the report.

3.9 Work with devices

The Devices application is used to manage and monitor devices. In the navigation pane, click the **Devices** button to open the Devices application. The navigation pane displays a configurable Devices tree showing all devices. From the tree, you can create devices and device folders. Using drag-and-drop functionality, devices can be organized into device groups, which allows for easier monitoring from the console window.

Barr EOM differentiates between destinations and devices. Destinations represent “queues” where Barr EOM can send documents. They can be queues on physical printers or a variety of other destination types, such as network folders, FTP servers, etc. Devices represent the physical printing hardware. Multiple destinations can be defined for the same device. This is particularly helpful for production devices, where the controller supports multiple LPD queues, each defined with different print preference settings.



Navigation pane options

When you right-click an item in the navigation pane, the following options are displayed. The options listed will vary, depending on whether a device or device group is selected.

Navigation Pane Option	Explanation
Open	Opens the device or device group in the active tab.
Open in New Tab	Opens the device or device group in a new tab.

Navigation Pane Option	Explanation
New Group (device groups only)	Creates a new device group under the selected device group. A new group entry titled "UnNamed" will appear in the tree. Type the new group name and press ENTER to create the group.
New Device (device groups only)	Creates a new device under the selected device group. Displays the New Device dialog box.
Configure Device (devices only)	Opens the selected destination in the Destination Configuration utility for editing.
Create Destination (devices only)	Creates a destination to be associated with the selected device. Displays the Add Destination dialog box. You can create fiery device, IPP, LPR, and socket destinations.
Rename	Renames the selected device or device group.
Delete	Deletes the selected device or device group. Device groups cannot be deleted if they contain any devices or subgroups.
Move to Group	Allows you to pick the group where the selected device will be moved.
Output History	Opens the Device Output History window for viewing the output history of selected devices or folders. From the submenu, you can choose from one of the predefined output history time frames or create a custom query.
SNMP Alerts History	Opens the SNMP Alert History window for viewing the SNMP alert history of selected devices or folders. From the submenu, you can choose from one of the predefined output history time frames or create a custom query.
SNMP Update (devices only)	Initiates SNMP updates for the selected device.

The console window displays a tabbed view of the Device tree selection. When a device is selected in the tree, a device home page will display showing the properties and status of the device. Below the home page, a grid displays listing all destinations associated with the device. When a device group (folder) is selected in the tree, the Device grid will display listing all of the devices in the group. Notice the Device grid is in a tab page control. By default, navigating in the tree will replace the information in the active tab. To open a device or group in new tab, right-click the item and select **Open in New Tab**. Your tree selection, open tab pages, and console window settings will be saved for the next time you open the application.

Grid right-click options

When you right-click a device in the grid, the following options display.

Grid Option	Explanation
Open	Opens the device in the active tab.
Open in New Tab	Opens the device in a new tab.
Configure Device	Opens the selected device for editing.
Create Destination	Creates a destination to be associated with the selected device. Displays the Add Destination dialog box. You can create fiery device, IPP, LPR, and socket destinations.
Rename	Renames the selected device.
Output History	Opens the Device Output History window for viewing the output history of selected devices. From the submenu, you can choose from one of the predefined output history time frames or create a custom query.
SNMP Alerts History	Opens the SNMP Alert History window for viewing the SNMP alert history of selected devices. From the submenu, you can choose from one of the predefined output history time frames or create a custom query.
SNMP Update	Initiates SNMP updates for the selected device.
Layouts	Layout files are saved for the logged in user. You will only have access to load and delete the layout files you create. Delete layout – Allows for deleting layout files created by the current user. The Delete Layout dialog box is displayed. Load layout – Allows for loading layout files created by the current user. The Load Layout dialog box is displayed. Reset layout – Abandons any unsaved grid changes and resets the grid to the default settings. The default settings are configured in the Configure Columns Utility. Save layout – Saves the current grid settings to a layout file for the current user. The Save Layout dialog box is displayed.

Grid status bar options

The following are the options that display in the status bar below the grid.

Status bar options	Explanation
Search	Searches the grid. To search, type the text you want to find and press ENTER or click the Search image. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to stop searching, move to the previous occurrence, and move to the next occurrence.
Print button	Prints the contents of the grid.
Paging buttons	Allows for paging through the grid. Click the double left arrow button (<<) to go to the first page, the left arrow button (<) to go to the previous page, the right arrow button (>) to go to the next page, and the double right arrow button (>>) to go to the last page.
Number of Records	Displays the number of records in the grid.

Manage device groups

Device groups are used to organize devices in the Device tree. Groups are represented as folders in the tree. From the EOM Console Devices tree, you can create, move, rename, and delete device groups.

To create a device group

1. From the Device tree, right-click a device group (folder) and select **New Group**. A new group (folder) titled “**UnNamed**” is added to the selected device group.
2. In the edit field, type the name of the new group and press ENTER.

To move a device group

1. From the Device tree, select the device group you want to move.
2. Use a drag-and-drop operation to place the group in the desired tree location. As you drag the item, a yellow arrow will appear to the left of the tree to indicate the location of the group.

To rename a device group

1. From the Device tree, right-click a device group select **Rename**.
2. In the edit field, type the new group name and press ENTER. To cancel the rename, press ESC.

To delete a device group

1. From the Devices tree, right-click the device group you want to delete.
2. Select **Delete** from the menu. Groups that contain devices or device groups cannot be deleted. All of the objects must be removed before the group can be deleted.

Add devices

Complete the following steps to add a device to the Devices application.

1. From the Devices tree, select the device group (folder) where you want to add devices. Right-click and select **New Device**. The **New Device** dialog box displays.
2. In the **Name** box, enter the name of the device.
3. In the **Server** list, select the appropriate server.
4. In the **IP Address** box, enter the IP address of the device.
5. Click **OK**.

Modify devices

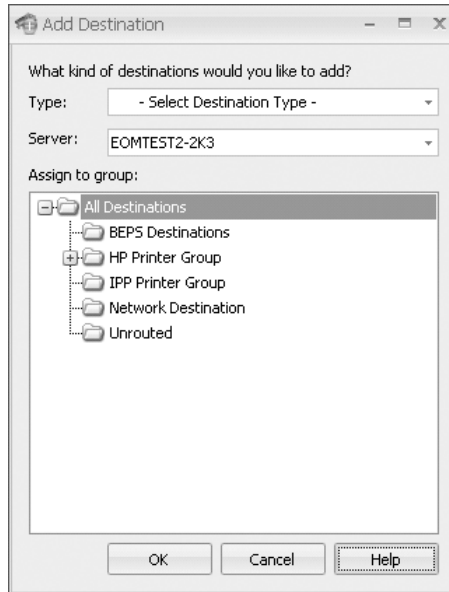
Complete the following steps to modify devices in the Devices application.

1. From the Devices tree or grid, right-click the device you want to modify and select **Configure Device**. The **Configure Device** dialog box displays.
2. Click directly in the grid to change the **Device Name** or **Type**.
3. Click **OK**.

Create destinations

Complete the following steps to create a destination from a selected device.

1. From the Devices tree or grid, right-click a device and select **Create Destination**. The **Add Destination** dialog box displays.



2. In the **Type** list, select the type of destination you want to create. You can select fiery device, IPP, LPR, or socket.
3. In the **Server** list, select the appropriate server.
4. Under **Assign to group**, select the destination group where the destination will be created.
5. Click **OK**. The destination will be created using the device name. If a destination already exists using that name, a counter will be added to the end of the destination name.

Search for devices

You can search for devices from the Device tree and Device grid.

From the Devices tree:

In the Search box below the tree, type the text you want to find and press ENTER or click the search button. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to move to the previous occurrence and move to the next occurrence.

From the Devices grid:

In the Search box below the grid, type the text you want to find, click the column in the grid you want to search, and press ENTER or click the Search image. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to stop searching, move to the previous occurrence, and move to the next occurrence.

Manage devices

Barr EOM differentiates between destinations and devices. Destinations represent "queues" where Barr EOM can send documents. Devices represent the physical printing hardware. You can control devices from the EOM Console using the following procedures.

To open a device

Use one of the following methods to open a device.

- From the Devices tree, click a device. The device will open in the current tab.
- From the Devices tree, right-click a device and select **Open**. The device will open in the current tab.
- From the Devices tree, right-click a device and select **Open in New Tab**. The device will open in a new tab.

To move a device

Devices can be organized into device groups. Once groups are created, devices and groups can be easily moved in the tree as necessary. Complete the following steps to move a device.

1. From the Devices tree, select the device or device group you want to move.
2. Use drag and drop functionality to place the item in the desired tree location. As you drag the item a yellow arrow will appear to the left of the tree to indicate where the item will be placed.

To rename a device

Complete the following steps to rename a device.

1. From the Devices tree, right-click a device and select **Rename**.
2. In the edit field, type the new device name and press ENTER. To cancel the rename, press ESC.

To view device output history or SNMP alert history

Complete the following steps to view the output history or SNMP alert history of devices or device folders. You can choose from one of the predefined history time frames or create a custom query.

1. From the Device tree, select a device or device folder.
2. Right-click and select **Output History** or **SNMP Alerts History**. From the submenu choose one of the predefined history time frames or create a custom query. To create a custom query, complete the following steps.
 - a. In the submenu, select **Custom query**. The query tool dialog displays.
 - b. Click the plus button next to the AND operator.
 - c. To select the column, click the column name link in the condition and select the appropriate column from the list. All available columns will display in the list.
 - d. Click the operator link in the condition and select the appropriate comparison operator from the list. The comparison operator list displays only the operators supported by the current column's data type. For example, the Priority column is of the numeric type so the operator list doesn't display the 'Begins with' operator and other operators that are related to the string type.
 - e. Click the **<enter a value>** link and enter a value in the box.
 - f. To add additional conditions, click the plus button next to the group's AND operator. This will create new conditions below the current one. Complete each condition statement using the steps above.
 - g. Click **OK** to query data using the created query statement.



You can create more advanced queries containing multiple logical (Boolean) operators. To change the root logical operator, click the current AND operator and select the appropriate operator from the list. You can then add a new query statement group by clicking the operator and selecting **Add Group**. You can add multiple groups containing multiple conditions. Complete each group using the steps above.

To cancel the query click the **Cancel Query Mode** button below the grid.

3. From the **History window**, review the output history or SNMP alert history for the selected device or folder.

4. Use the following procedures to change the output history as needed.
 - In the Devices tree, click devices and folders as necessary. The grid will update to match the new tree selection.
 - Click a new history time period as necessary. The grid will update to match the new time period selection.
 - Click **Refresh Query** below the grid to update the grid with the latest information.



Search the tree: In the Search box below the tree, type the text you want to find and press ENTER or click the search button. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to move to the previous occurrence and move to the next occurrence.

Search the grid: In the Search box below the grid, type the text you want to find, click the column in the grid you want to search, and then press ENTER or click the Search button. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to stop searching, move to the previous occurrence, and move to the next occurrence.

Print the history: Click the **Print** button below the grid to print the history.

To initiate an SNMP update

Complete the following steps to initiate and SNMP update for a selected device.

1. From the Devices tree, select a device.
2. Right-click and select **SNMP Update**. Any SNMP updates are automatically performed.

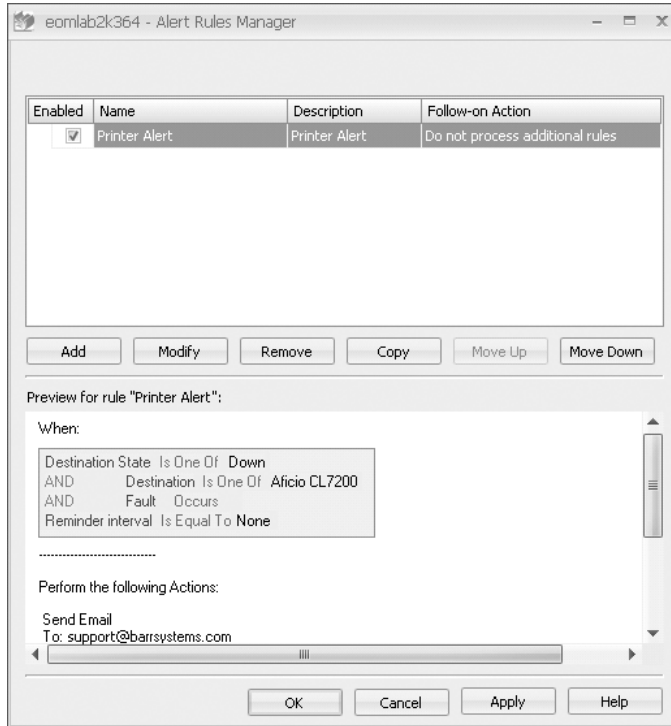
3.10 Work with alert rules

Administrators can configure alert rules that will send alerts when certain events happen. Alert rules are particularly useful for monitoring printer states. Support personnel can be notified automatically when printers have conditions that could prevent end user printing. Rules include conditions and actions. When a condition is found to be true, the configured action takes effect.

Manage alert rules

The following procedure provides the basic steps for managing alert rules. See “Create alert rules” for specific steps for creating alert rules.

1. From the EOM Console menu bar, select Tools | **Alert Rules**. The **Alert Rules Manager** dialog box is displayed.



2. The alert rules grid lists all of the defined alert rules in the order that they will be processed. Selecting a rule displays the rule for preview below the grid. The alert rules grid is editable. Use the following procedures from the rules grid:
 - To determine whether the rule is enabled or disabled, use the check box in the **Enabled** column.
 - To change the follow-on action, click in the **Follow-on Action** cell and select the action you would like to take after this rule has been processed. You can continue processing or choose not to process any additional rules.
3. Under the alert rules grid, use the following procedures to configure rules:
 - To create a rule, click **Add**. (See “Create alert rules” for detailed steps.)
 - To modify a rule, select a rule and click **Modify**.
 - To delete a rule, select a rule and click **Remove**.

- To create a copy of a rule, select a rule and click **Copy**. To rename the rule, double-click the rule, or select the new rule and click **Modify**. The **Alert Rule** dialog box displays.
 - To reorder the rules, select a rule and click **Move Up** or **Move Down**.
4. Click **OK** or **Apply** to save your changes.

Create alert rules

Use the following procedure to create an alert rule. You will configure conditions and an email action.

1. From the menu bar, select Tools | **Alert Rules**. The **Alert Rules Manager** dialog box is displayed.
2. Under the alert rules grid, click **Add**. The **Add Rule** dialog box is displayed.

3. Enter a rule **Name** and **Description**.
4. To specify whether the rule will be enabled or disabled, use the **Enabled** check box.

5. Use the following steps to create a rule condition from the **When** box. You must select values for all definitions to save the rule.
 - a. In the **Destination State** statement, click the **<Values>** link. From the **Select Alert** dialog, expand the **Snmp Device Alerts** tree and the **Destination Alerts** tree and select the options that the alert rule should perform the actions on. Selecting a section will select all conditions it contains.
 - b. In the **Destination** statement, click the **<Values>** link. From the **Select Destination** dialog, select the appropriate destinations in the tree. You can multiple select by pressing the CTRL or SHIFT keys and selecting destinations.
 - c. In the **Fault** statement, click the link and choose between the **Occurs** and **Behavior** options.
 - **Occurs** - The action will be executed when the fault occurs. The fault condition will not be evaluated. This is the default selection.
 - **Behavior** - If you select this option, a **<Values>** link will display. Click this link to configure the fault behavior. From the **Fault Behavior** dialog, configure whether the behavior that triggers the rule action is active for the time period chosen, or if the fault behavior is repeated so many times before the rule action is fired. If you do not want this level of granularity for the fault condition, select the **Occurs** behavior.
 - d. In the **Remainder interval** statement, click the link to configure the reminder interval on the **Notification Reminder** dialog. This allows you to repeat the action over a period of time. If you want the action to only send the notification once, set the value for the notification reminder interval to 0 and the value will change to **None**. The default reminder interval is **None**.

6. Use the following steps to create a send email rule action.
 - a. In the **Perform the following actions** box, click the **<Action>** link and select **Send Email**. The **Send Email** dialog box is displayed.

The image shows a 'Send Email' dialog box with a title bar and a close button. It contains several input fields: 'Profile' (a dropdown menu showing '- No Outbound Email Profiles Defined -'), 'Priority' (a dropdown menu showing 'Normal Importance'), 'To:', 'Cc:', 'Bcc:', 'Reply to:', and 'Subject:'. Below these is a 'Digest:' section with a 'Send Digest' dropdown (set to 'None') and an 'Interval' field followed by 'min' and 'Max Alerts' with another input field. A large text area for the email body is located below the 'Digest' section. At the bottom are four buttons: 'Validate', 'OK', 'Cancel', and 'Help'.

- b. Select a **Profile** from the drop-down list. You can also click the Browse button to display the **Manage Outbound Email Profiles** dialog box. This dialog box lists all of the defined email profiles. From this dialog box, you can create, import, and export profiles, as well as manage all existing profiles. To create a new email profile, click **New** and configure the email profile from the **Outbound Email Profile** dialog box. When you are finished, click **OK** and then click **Close**.
 - c. From the **Send Email** dialog box, enter the email addresses that will be notified in the **To**, **CC**, and **Bcc** fields. You can enter multiple email addresses separated by a comma.
 - d. In the **Reply to** field, enter an email address for replies. You can enter multiple email addresses separated by a comma.
 - e. Enter the email **Subject** text.

- f. Under **Digest**, determine if you want to send the notification messages for multiple events concatenated into one email. To enable the digest feature, in the **Send Digest** list, choose from the following options:
 - **Every interval** – Sends the digest according to the time interval specified. You will receive a message every interval, even if no alerts were received during the interval.
 - **At time interval** – Sends the digest according to the time interval specified. The time interval will start when the first notification messages is received. You will be notified when at least one notification has been received.
 - **Every hour** – Sends the digest every hour. You will receive a message every interval, even if no alerts were received during the interval.
 - **Every half hour** – Sends the digest every half hour. You will receive a message every interval, even if no alerts were received during the interval.If necessary, specify the **Interval** in minutes. In the **Max Alerts** box, you can specify the maximum number of alerts to be included in the digest.
- g. Enter the body text. To insert document properties in the body text, right-click in the text box, select **Insert Document Property**, and choose the appropriate properties. The values of the properties will display in the email message. To insert functions, right-click in the box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions.
- h. Click **Validate** to validate the entered body text.
- i. Click **OK**.
7. You can create, organize, and remove rule actions using the buttons below the actions box.
8. Select the action you want to take after this rule is processed using the **Follow-on Action** drop-down box. You can continue processing rules or choose not to process any additional rules.
9. Click **OK** to save your alert rule.

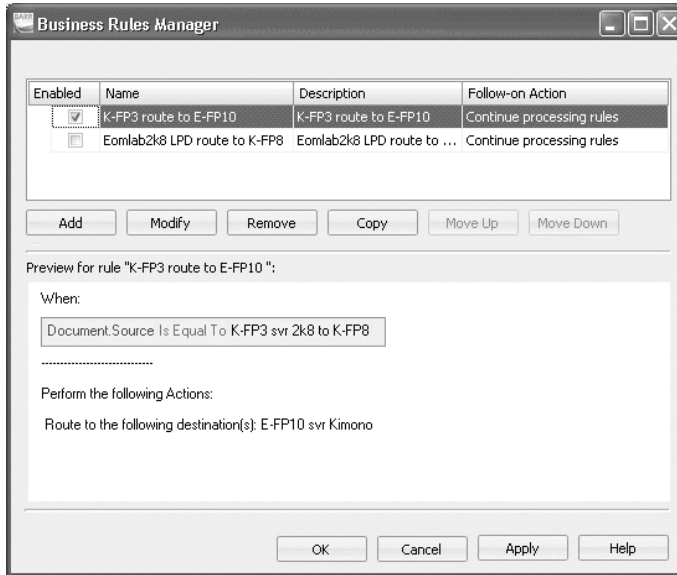
3.11 Work with business rules

Administrators can create business rules to assist in automating document processes for unattended operation. Sample business rules include routing to destinations, transforming to other print languages, assigning to document folders, and editing document properties. Rules include conditions and actions. When a condition is found to be true, the configured action takes effect.

Manage business rules

The following procedure provides the basic steps for managing business rules. See “Create business rules” for specific steps for creating business rules.

1. From the EOM Console menu bar, select Tools | **Business Rules**. The **Business Rules Manager** dialog box is displayed.



2. The business rules grid lists all of the defined business rules in the order that they will be processed. Selecting a rule displays the rule for preview below the grid. The business rules grid is editable. Use the following procedures from the rules grid for each rule that you want to modify:
 - To specify whether the rule is enabled or disabled, select or clear the check box in the **Enabled** column.
 - To change the follow-on action, click in the **Follow-on Action** cell and select the action that you would like to take after this rule has been processed.
3. Under the business rules grid, use the following procedures to configure rules.
 - To create a rule, click **Add**. (For detailed steps, see “Create business rules.”)
 - To modify a rule, select a rule and click **Modify**.
 - To delete a rule, select a rule and click **Remove**.
 - To create a copy of a rule, select a rule and click **Copy**. A copy of the selected rule will be created. To rename the rule, double-click the rule or select the new rule and click **Modify**.
 - To reorder the rules, select a rule and click **Move Up** or **Move Down**.
4. Click **OK** or **Apply** to save your changes.

Create business rules

When you create a business rule, you must configure conditions and actions for it. Use the following procedure to create a business rule.

1. From the EOM Console menu bar, select Tools | **Business Rules**. The **Business Rules Manager** dialog box is displayed.
2. Under the business rules grid, click **Add**. The **Business Rule** dialog box is displayed.

The screenshot shows the 'New Business Rule' dialog box. It has a title bar with standard window controls. The main area contains several sections: 'Name' and 'Description' text boxes, an 'Enabled' checkbox, a 'Rule definition' section with a checkbox for 'Always execute this rule (no conditions)', a 'When' section with a '<Target>' link, a section for 'Perform the following actions:' with a '<Action>' link, and a 'Follow-on Action:' dropdown menu. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

3. Enter a rule **Name** and **Description**.
4. Use the **Enabled** check box to determine whether the rule will be enabled or disabled.
5. To apply the rule to all documents, select the **Always execute this rule (no conditions)** check box. Selecting this check box disables the **When** box because no condition statements are needed. If you select this option, go to step 7.
6. Use the **When** box to create and manage the rule conditions. Multiple conditions can be created and organized into groups. A blue box is used to indicate a condition group. To create a rule condition, perform the following steps.
 - a. In the **When** box, click the **<Target>** link. Use the drop-down list to select the appropriate condition.
 - b. Click the **Operation** link and select the appropriate operation.

- c. Click the **Value** link and select the appropriate value. The condition statement is now completed.
To include additional condition statements or create groups of conditions:
 - Select a condition radio button (inside the box) to enable the **Add Condition** and **Remove Condition** buttons for adding and removing condition statements.
 - Select a group radio button (outside the box) to enable the **Add Group** and **Remove Group** buttons for adding and removing groups. This will also enable the **Add Condition** button for adding a condition to the selected group.
7. Under the **Perform the following actions** dialog box, use the following procedures to manage actions:
 - To create an action, click the **<Action>** link and select the appropriate action. For the steps for each action type, see “Create business rule actions.”
 - To create additional actions, click **Add Action**.
 - To modify an action, either click the desired action link or click the area next to the link and click **Modify Action**.
 - To delete an action, click the area next to the link and click **Remove Action**.
 - To reorder the actions, click the area next to the action link and click **Move Up** or **Move Down**.
8. Select the action you want to take after this rule is processed using the **Follow-on Action** drop-down box. You can continue processing rules or choose not to process any additional rules.



When new documents are created as a result of a rule action, the processing of the new documents varies from the processing of the original document. The new documents continue with the next rule action. The original document, if you choose **Continue processing rules**, skips the next rule actions in the current rule, and goes to the next rule. Transform, Burst, and sometimes Advanced Document Modification actions create new documents. For example, when you transform a document from postscript to pdf, a new document is created, or when you burst a document into 10 documents, 10 new burst documents are created.

9. When you are finished creating business rules, click **OK** to save your changes.

Create business rule actions

Business rule actions created to perform actions on documents. Review the list below for a description of each action type.

- **Assign Profiles to Document:**
 - **Set Failover Profile** – Specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents).
 - **Set Filter Profile** – Associates a filter profile with a document. This filter will be used for document viewing and reprinting.
 - **Set Library Filing Profile** – Sends documents to the document library. Specifies the library folder where documents will be sent, the file store, any notifications, and how long to keep documents before deleting.
 - **Set Notification Profile** – Sends notifications when specific events occur in the document life cycle.
 - **Set Output Process** – Performs processing such as search and replace, setting finishing options, editing PDL commands, inserting overlays, and so on.
- **Burst:**
 - **Line Mode** – Bursts line data documents based on data contained in the document, the desired output size and size of original document, or the number of output documents desired.
 - **Page Mode** – Splits printer ready documents based on data contained in the document (regions are used to determine burst conditions), the desired output size and size of original document, or the number of output documents desired.
- **Extract Text:**
 - **Line Mode** – Extracts text from line data documents using rows and columns.
 - **Page Mode** – Extracts text from printer ready documents using regions (rectangles).
- **Modify Document Contents** – Runs the ADM (Advanced Document Modification) process. In this process each page of the document is read, portions of the document can be changed or values extracted, and then the page is written. This can be used as an advanced way to extract text, burst, or perform other operations on the document.
- **Route to Destinations:**
 - **Advanced** – Allows you to use a .csv file to dynamically pick destinations based on a document property.
 - **Basic** – Specifies the destinations where documents should be sent.
- **Set Document Properties** – Configures document properties.

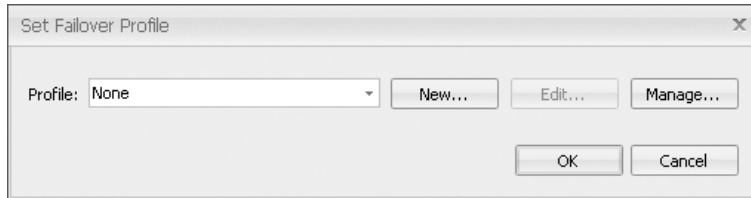
- **Transform Document:**
 - **Adept** – Transforms documents using the Adept transform suite.
 - **Page Mode** – Transforms the format of a printer ready document to a new format, and/or to another data type.
 - **Record Mode (Advanced)** – Transforms line data from one line format to another.
 - **Record Mode (Basic)** – Performs the most common transforms for data coming from a Barr Enterprise Print Server device. This converts .tnj to ASCII text, .anj to AFP, and .bnj to .bin.
- **Analyze Document** – Processes documents and populates document properties.
- **Assign to Document Folder** – Assigns documents to specific document folders.
- **Convert Fixed Block to Variable Block** – Converts FBA to VBA and FBM to VBM. It can be used when dealing with mainframe tape formats.
- **Delete Document** – Deletes documents.
- **Move Document to File Store** – Moves documents to another location (file store).
- **Package Banner** – Adds a banner to the beginning of the package. The banner will be added as a separate document within the same package.
- **Power Rule** – Allows you to build multiple rules inside of one rule.
- **Run Adhoc Rule** – Runs an existing ad hoc rule.
- **Run Command** – Performs a command line operation on the document.
- **Schedule Output** – Schedules documents to print at a specific date and time.
- **Send Email** – Sends email messages when specific events occur in the document life cycle.
- **Set Billing Accounts** – Documentation coming soon
- **Set Document Owner** – Configures the document owner.
- **Set Document State** – Sets the document state to hold or ready.
- **Set Retain Period** – Determines how long documents will be retained.
- **Unpackage** – Separates documents that are in a package so they can act as individual documents in Barr EOM.

The steps necessary to configure action types are listed in the following sections. Perform the steps in the appropriate section to configure business rule actions.

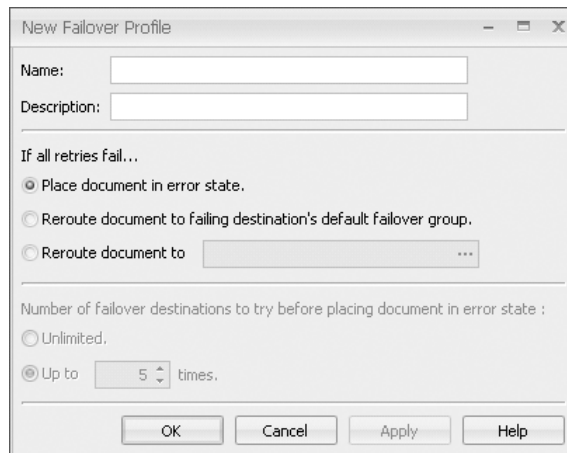
To set failover profiles

Use this action to determine what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents).

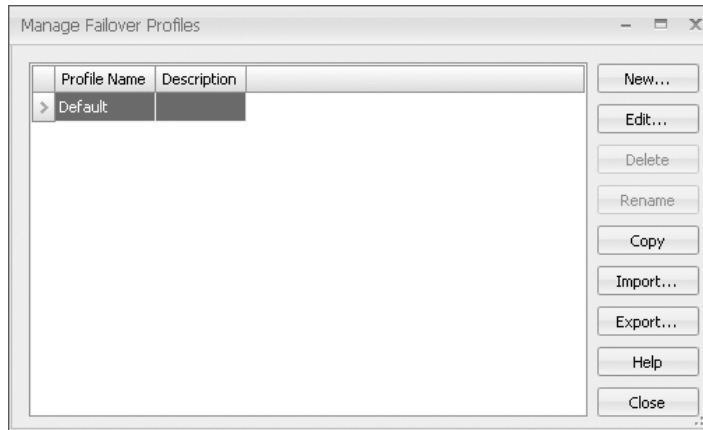
1. In the **Perform the following actions** box, click the **<Action>** link and select **Assign Profiles to Document** | **Set Failover Profile**. The **Set Failover Profile** dialog box is displayed.



2. Select an existing **Profile** from the drop-down list or click **New** to create a new failover profile. From the **New Failover Profile** dialog box, you can determine what should happen if all of the retries fail and when to place the document in an error state.



You can click **Edit** to edit the selected profile or click **Manage** to display the **Manage Failover Profiles** dialog box, which lists all of the defined profiles. When managing profiles, you can create, import, and export profiles, as well as manage all existing profiles.



3. When you have selected your profile, click **OK**.

To set filter profiles

Use this action to associate a transform filter to a document. This filter tells EOM how to format fonts and additional information for printing. This filter is used when the document is viewed or printed.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Assign Profiles to Document | Set Filter Profile**. The **Set Filter Profile** dialog box is displayed.
2. In the **Format** list, select the data type.
3. Select an existing **Profile** from the drop-down list or click **New** to create a new filter profile from the **Configure Filter Profile** dialog box.

You can click **Edit** to edit the selected profile or click **Manage** to display the **Resource Manager** dialog box, which lists all of the defined profiles. When managing profiles, you can create, import, and export profiles, as well as manage all existing profiles.

4. When you have selected your profile, click **OK**.

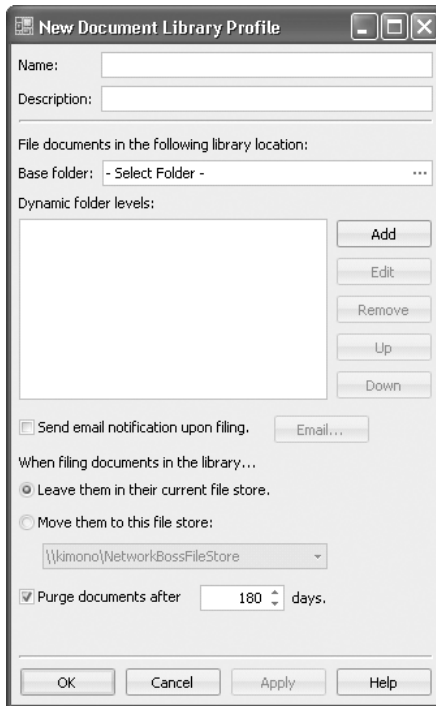
To set library filing profiles

Use this action to send documents to the document library. You will specify the library folder where documents will be sent, the file store, any notifications, and how long to keep documents before deleting.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Assign Profiles to Document | Set Library Filing Profile**. The **Set Library Filing Profile** dialog box is displayed.
2. Select an existing **Profile** from the drop-down list or click **New** to create a new library profile from the **Document Library Profile** dialog box. You can click **Edit** to edit the selected profile or click **Manage** to display the **Manage Document Library Profiles** dialog box, which lists all of the defined profiles. When managing profiles, you can create, import, and export profiles, as well as manage all existing profiles.

Complete the following steps to configure a library profile.

- a. Click **New**.



- b. Specify the library profile **Name** and **Description**.

- c. Determine where documents will be placed in the library. You must first click the **Base folder** Browse (...) button to select an existing folder. If you want, you can then specify one or more **Dynamic folder levels** to be placed under the selected **Base folder**. To create dynamic folders, click **Add** and enter a folder name. The folder name can consist of text, one or more document properties, and functions. To insert document properties, right-click in the text box and select **Insert Document Property**. To insert functions, right-click in the box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions. Once you have entered the folder name, click **OK**.
You can add, edit, and remove folders, and change the folder order using the buttons next to the box. Each level added becomes a subfolder of the folder above it in the list.
 - d. If you want to send an email notification when a document is sent to the library, select **Send email notification upon filing** and click **Email**. Configure the email setting on the **Send Email** dialog box.
 - e. Specify the file store for documents sent to the library. You can choose to leave them in their current file store or move them to a specified file store.
 - f. In the **Purge documents** field, specify how long documents should stay in the library before they are deleted.
 - g. Click **OK**.
3. When you have selected your profile, click **OK**.

To set notification profiles

Use this action to send notifications when specific events occur in the document life cycle. Notifications are sent according to defined notification profiles. Notification profiles specify which events generate notifications (document arrives, prints successfully, prints on failover destination, or is in error state), the type of notification for each event (email or pop-up), the text of notifications for each event, and who should get notified. For example, you can configure a pop-up to display after a document prints successfully.

1. In the **Perform the following actions** box, click the **<Action>** link and select Assign Profiles to Document | **Set Notification Profile**. The **Set Notification Profile** dialog box is displayed.
2. Select an existing **Profile** from the drop-down list or click **New** to create a new notification profile from the **Notification Profile** dialog box. You can click **Edit** to edit the selected profile or click **Manage** to display the **Manage Document Library Profiles** dialog box, which lists all of the defined profiles. When managing profiles, you can create, import, and export profiles, as well as manage all existing profiles.

Complete the following steps to configure a notification profile.

- a. Click **New**.

New Notification Profile

Name:

Description:

Email profile:

Notifications:

	When the document...	Send notification via...	Notify owner	Recipients	Message
>			☐		

- b. Specify the profile **Name** and **Description**.
- c. If this profile will send email notifications, select the **Email profile** that will be used with those notifications. You can select an email profile from the drop-down list or click the Browse button and manage profiles from the **Manage Outbound Email Profiles** dialog box. From this dialog box, you can create and modify email profiles using the **Outbound Email Profile** dialog box.
- d. Click directly in the **Notifications** grid to configure the notifications that will be sent. You will need to configure each grid column. You can add and remove notifications (grid rows) using the **Add** and **Remove** buttons.
 - **When the document...** – Select when a notification will be sent. You can choose to send a notification when a document **Arrives**, **Prints Successfully**, **Prints on Failover Destination**, or **Is In Error State**.
 - **Send notification via...** – Select how the notification will be sent and displayed. You can choose to send notifications using the **Tray Client Pop-up** or as an **Email Message**.
 - **Notify owner** – Choose whether the document owner will be sent a notification.

- **Recipients** – Click the Browse button to select who will receive the notification. You can select users and groups from the **User and Group Selection** dialog box.
 - **Message** – Enter the notification text. Click the drop-down arrow to make any text changes. You can insert document properties and functions in the body text. To insert document properties, right-click in the text box, select **Insert Document Property**, and choose the appropriate properties. Document properties are displayed enclosed in brackets ([]). The values of the properties are displayed in the notification. To insert functions, right-click in the box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions.
- e. Click **OK**.
3. When you have selected your profile, click **OK**.

To set output processes

Use this action to impact a document as it is being sent to a destination. Examples include search and replace, setting finishing options, editing PJJL commands, inserting overlays, and so on.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Set Output Process**. The **Set Output Process** dialog box is displayed.
2. Select an existing **Profile** from the drop-down list or click **New** to create a new output process using the **Process Designer**. See the “Work with output processes” Help topic for specific output process procedures.
 You can click **Edit** to edit the selected profile or click **Manage** to display the **Manage Output Process Profiles** dialog box, which lists all of the defined profiles. When managing profiles, you can create, import, and export profiles, as well as manage all existing profiles.
3. When you have selected your profile, click **OK**.

To burst using line mode

Use this action to split line data documents (text documents with or without carriage control) based on data contained in the document, desired output size, or number of output documents desired. When bursting, new documents are created. For example, when you burst a document into 10 documents, 10 new burst documents are created. The new burst documents continue with the next rule action. The original document, if you choose "continue processing rules," skips the next rule actions in the current rule, and goes to the next rule.

1. In the **Perform the following actions** box, click the **<Action>** link and select Burst | **Line Mode**. The **Extract Text tab - line mode** displays.

Burst Document - Line Mode

Extract Text | Burst Conditions | Set Document Properties

Server: <Select Server>

Detect:

Use: ☒ Lines ☐ Records Lines per page: 66

Format: ASCII

Codepage: 437 - OEM United States

☐ Banner mode

Search for:

Page:

Column:

Lines: to

Extraction Variables:

New... Modify... Remove...

Name	Type	Description

OK Cancel Help

2. In the **Server** list, click the licensed rules agent server that you would like to use.

3. Under **Detect**, determine if you want to detect the text to extract by **Lines** or **Records**.
 - Select **Lines** if you want to use carriage control when specifying the position of variables on the page.
 - Select **Records** to count records, ignoring carriage control, when specifying the position of variables on the page.
4. In the **Format** list, click the data format.
5. In the **Code page** list, click the associated code page.
6. If desired, select **Banner mode**. Selecting this option allows the recognition string location to vary on the page. This will search the document for a recognition string. The recognition line becomes line 1 and the extraction variables will be relative to it.
 - a. In the **Search for** box, specify the text that defines the recognition string.
 - b. In the **Page** box, specify the page at which to start searching.
 - c. In the **Column** box, specify the column at which to start searching.
 - d. In the **Lines** boxes, enter the line numbers between which you would like to search.
7. Under **Extraction variables**, create one or more variables that will be used for bursting or extraction. You can add, modify, and remove variables using the buttons above the grid. To add a new variable, complete the following steps.
 - a. Click **New**. The **Text Extraction Variable Definition** dialog box displays.

The image shows a dialog box titled "Text Extraction Variable Definition - Line Mode". It contains the following fields and options:

- Name:** A text input field.
- Description:** A text input field.
- Type:** Two radio buttons: "Burst" (selected) and "Extract".
- ☐ **Trim Spaces**
- Location on page:** A section containing:
 - Line/Record:** A text input field.
 - Column:** A text input field.
 - Extract:** A text input field followed by the text "characters".
- Page selection:** Two radio buttons:
 - ☒ **Page:** 1 of newly created burst document.
 - ☐ **First page with non-blank value in selected location**
- At the bottom are three buttons: **OK**, **Cancel**, and **Help**.

- b. Enter the **Name**, **Description**, and **Type** of extraction variable. There are two types of extraction variables, those used for bursting and those used to extract data.

- c. If you want to remove spaces that exist at the start and end of the extracted text, select **Trim spaces**.
 - d. Under **Location on page**, specify the **Line/Record** number from which the text will be extracted. If you are using record mode, it will be the record number of the current page (i.e., variables on page 2 and greater are relative to line 1 on that page). If you selected **Banner mode**, the recognition line becomes line 1 and the extraction variables are relative to it.
 - e. In the **Column** box, specify the start column for the extraction.
 - f. In the **Extract** box, enter the number of characters to extract.
 - g. If this is an **Extract** type variable, under **Page selection** specify the page of the newly created burst document from which you want to extract the text. You can enter a **Page** number or select **First page with non-blank value in selected location**.
 - h. Click **OK**. Once a variable of a particular type has been created, it cannot be changed to the other type.
8. From the **Burst Conditions** tab, specify what how to create the new documents. You can create documents using one of the following methods:
 - **Extracted variables** – Allows for selecting the extraction variables created from the **Text Extraction Variable Definition** dialog box as conditions in the **When** box. You can choose the extraction variable and condition that will cause new documents to be created.
 - **Number of pages** – Allows for splitting documents based on the number of pages. When you select this option, the **Split.Pages in new document** and **Split.Pages in current document** variables are available in the **When** box.
 - **Number of output documents** – Splits a document into a specified number of equally sized output documents. For example, if you submit a document with 99 pages, and you set the number of output documents to 3, you would get 3 output documents of 33 pages each. If necessary, you can select extraction variables created from the **Extract Text** tab as conditions in the **When** box. Barr EOM will find the position in the source document where the split should occur based on pages per documents, and then start a new document after the additional condition is met. This allows the boundary between split documents to be better controlled based on the contents of the document.

9. The **When** box is used to create and manage the burst conditions. Multiple conditions can be created and organized into groups. A blue box is used to indicate a condition group. To create a burst condition, perform the following steps. If you chose to split based on the number of output documents, the When box is not available.
- In the **When** box, click the **<Target>** link and select the appropriate variable. The variables that display vary depending what the split is based on. If **Extracted variables** is selected, the extraction variables added from the **Text Extraction Variable Definition** dialog box will be listed in the menu. If **Number of pages** is selected, you can choose the following variables:
 - Split.Pages in current document** – Specifies the total number of pages in the current document.
 - Split.Pages in new document** – Specifies the number of pages to be contained in each new burst document. The number of pages is determined from the beginning of the document or from the previous burst. If the total number of pages of the current document is not equally divisible by this value, the final burst document will contain fewer pages.



For example, if you create a condition where “**Split.Pages in new document** is equal to 20 AND **Split.Pages in current document** is between to 0 AND 200”, when you submit a 100 page document, the process will split it into 5 20 page documents. Each page is analyzed to determine if it is the 20th page since a burst or the beginning of the document. When the 20th page is reached, a new burst document is created containing those 20 pages (that page combined with the previous 19 pages). The page count process repeats until the end of the document.

- If **Number of output documents** is selected, the extraction variables added on the **Extract Text** tab will be listed in the menu.
- Click the **Operation** link and select the appropriate operation.
 - Click the **Value** link and select the appropriate value. This condition statement is completed.
 - To include additional condition statements or create groups of conditions:
 - Select a condition radio button (inside the box) to enable the **Add Condition** and **Remove Condition** buttons for adding and removing condition statements.
 - Select a group radio button (outside the box) to enable the **Add Group** and **Remove Group** buttons for adding and removing groups. This will also enable the **Add Condition** button for adding a condition to the selected group.
 - Under **Follow-on action**, specify the action you would like the input document (original document) to take after this rule has been processed. You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.

10. From the **Set Document Properties** tab, configure the document properties for the newly created burst documents. The grid lists the property values that can be configured grouped in the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.
 - a. Expand the category of the property you want to configure. The first node level in the category determines the print preferences for the properties it contains. In the **Mode/Value** column, select how the property should be applied when a document is sent to a destination. You can choose from the following options:
 - **Always Apply** – Always applies the specified property value. Barr EOM will add commands to the print stream to enforce the print preference. If the document already contains commands for that print preference, Barr EOM will modify the commands to work with the printer family where the document is being sent.
 - **Apply Conditionally** – Applies the property value conditionally. Barr EOM will only add or modify commands for the print preference when the printer family that the document is destined for is different from the printer family the document was originally designed for.
 - **Informational Only** – Barr EOM makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.
 - b. Under each print preference are the parameters needed to generate that print preference. In the **Mode/Value** column, specify the document property value. You can use functions to insert and extract data as necessary. See section 3.13 “Use EOM functions” for more information.
11. Click **OK** to save the business rule.

To burst using page mode

Use this action to burst printer ready documents. Regions (rectangles) are used to determine burst conditions. Or splitting is based on the desired output size of documents or the desired number of output documents.

1. In the **Perform the following actions** box, click the **<Action>** link and select Burst | **Page Mode**. The **Extract Text tab - page mode** displays.

Burst Document - Page Mode

Extract Text | Burst Conditions | Set Document Properties

Server: <Select Server>

Server configuration:

Transform package: [Dropdown]

New... Modify... Remove

☐ Override input filter profile assigned to document.

Additional Parameters: [Text Field]

Extraction Variables:

New... Modify... Remove...

Name	Type	Description

OK Cancel Help

2. In the **Server** list, click the licensed transform server that you would like to use.
3. In the **Transform package** list, you can select an existing transform package for bursting or create one. Complete the following steps to create a bursting transform package.
 - a. Click **New**. The **General** tab displays.
 - b. Enter the transform package **Name**.
 - c. Select a transform package **Type** of BarrEOM or DocBridge. DocBridge requires the purchase of a standalone version of the transform software and a separate license. DocBridge has more data types available.

- d. If you select DocBridge, verify the **EXE path** is set to the correct folder. The default EXE path is @EOMTransformDir. To change the path, type in the box or click the ellipsis (...) button.
 - e. Set the **Logging State**. The logging state determines if transform logs and temp files will be saved in the document folder. By default, the **Logging State** is set to Yes. All log files should be inspected during installation and pre-production testing to insure that fonts are correctly mapped. In a production system, the logging can be disabled to save disk space. If the transform operation returns an error (return code not zero), the log and temp files will not be deleted, and are available for troubleshooting.
 - f. On the **Filter Profiles** tab, specify how the transform software will handle the formatting for each data type.
 - To configure a profile, click the ellipsis button in the **Modify/New** column for the appropriate formats. From the **Configure Filter Profile** dialog box, configure the profile as needed. The profile contains a communications and printer definition section.
 - To select a profile, click in the **Configuration** column for the appropriate formats and select the profile from the list.
 - g. On the **Resources** tab, specify where the transform software will find the resources needed for the transformation. For example, PDF fonts are usually found at the location of an Adobe installation.
 - h. On the **Fonts** tab, you can control the font mapping of input fonts to output fonts. The defaults are typically correct, but may need to be adjusted for special cases. You can add or modify fonts directly in the grid.
 - i. Click **OK** to create the transform package.
4. Use the **Override input filter profile assigned to document** checkbox option to determine if you want to override the input filter profile assigned to the document or if you want to use the filter profile configured in the transform package. Select the checkbox to use the filter profile in the transform package.
 5. In the **Additional Parameters** box, specify additional parameters needed for the transform software.
 6. Under **Extraction variables**, create one or more variables that will be used for bursting or extraction. You can add, modify, and remove variables using the buttons above the grid. To add a new variable, complete the following steps.
 - a. Click **New**. The **Text Extraction Variable Definition** dialog box displays.
 - b. Enter the **Name**, **Description**, and **Type** of extraction variable. There are two types of extraction variables, those used for bursting and those used to extract data.
 - c. If you want to remove spaces that exist at the start and end of the extracted text, select **Trim spaces**.

- d. Under **Location on page**, specify the region (rectangle) from which text will be extracted. This is done by entering the upper left corner's X and Y coordinates, width, and height. **Tip:** The region values can be found by viewing a document with the Barr EOM viewer. In the viewer, select View | Text Selection Mode in the menu bar. Then, drag the cursor to select the desired region. The coordinates will appear in the status bar.
 - e. If this is an **Extract** type variable, under **Page selection** specify the page of the newly created burst document from which you want to extract the text. You can enter a **Page** number or select **First page with non-blank value in selected location**.
 - f. Click **OK**. Once a variable of a particular type has been created, it cannot be changed to the other type.
7. From the **Burst Conditions** tab, specify what how to create the new documents. You can create documents using one of the following methods:
 - **Extracted variables** – Allows for selecting the extraction variables created from the **Text Extraction Variable Definition** dialog box as conditions in the **When** box. You can choose the extraction variable and condition that will cause new documents to be created.
 - **Number of pages** – Allows for splitting documents based on the number of pages. When you select this option, the **Split.Pages in new document** and **Split.Pages in current document** variables are available in the **Burst when** box.
 - **Number of output documents** – Splits a document into a specified number of equally sized output documents. For example, if you submit a document with 99 pages, and you set the number of output documents to 3, you would get 3 output documents of 33 pages each.
 8. The **When** box is used to create and manage the burst conditions. Multiple conditions can be created and organized into groups. A blue box is used to indicate a condition group. To create a burst condition, perform the following steps. If you chose to split based on the number of output documents, the **When** box is not available.
 - a. In the **When** box, click the **<Target>** link and select the appropriate variable. The variables that display vary depending what the split is based on. If **Extracted variables** is selected, the extraction variables added from the **Text Extraction Variable Definition** dialog box will be listed in the menu. If **Number of pages** is selected, you can choose the following variables:
 - **Split.Pages in current document** – Specifies the total number of pages in the current document.
 - **Split.Pages in new document** – Specifies the number of pages to be contained in each new burst document. The number of pages is determined from the beginning of the document or from the previous burst. If the total number of pages of the current document is not equally divisible by this value, the final burst document will contain fewer pages.



For example, if you create a condition where “**Split.Pages in new document** is equal to 20 AND **Split.Pages in current document** is between 0 AND 200”, when you submit a 100 page document, the process will split it into 5 20 page documents. Each page is analyzed to determine if it is the 20th page since a burst or the beginning of the document. When the 20th page is reached, a new burst document is created containing those 20 pages (that page combined with the previous 19 pages). The page count process repeats until the end of the document.

- b. Click the **Operation** link and select the appropriate operation.
 - c. Click the **Value** link and select the appropriate value. This condition statement is completed.
 - d. To include additional condition statements or create groups of conditions:
 - Select a condition radio button (inside the box) to enable the **Add Condition** and **Remove Condition** buttons for adding and removing condition statements.
 - Select a group radio button (outside the box) to enable the **Add Group** and **Remove Group** buttons for adding and removing groups. This will also enable the **Add Condition** button for adding a condition to the selected group.
 - e. Under **Follow-on action**, specify the action you would like the input document (original document) to take after this rule has been processed. You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.
9. From the **Set Document Properties** tab, configure the document properties for the newly created burst documents. The grid lists the property values that can be configured grouped in the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.
- a. Expand the category of the property you want to configure. The first node level in the category determines the print preferences for the properties it contains. In the **Mode/Value** column, select how the property should be applied when a document is sent to a destination. You can choose from the following options:
 - **Always Apply** – Always applies the specified property value. Barr EOM will add commands to the print stream to enforce the print preference. If the document already contains commands for that print preference, Barr EOM will modify the commands to work with the printer family where the document is being sent.

- **Apply Conditionally** – Applies the property value conditionally. Barr EOM will only add or modify commands for the print preference when the printer family that the document is destined for is different from the printer family the document was originally designed for.
 - **Informational Only** – Barr EOM makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.
- b. Under each print preference are the parameters needed to generate that print preference. In the **Mode/Value** column, specify the document property value. You can use functions to insert and extract data as necessary. See section 3.13 “Use EOM functions” for more information.
10. Click **OK** to save the business rule.

To extract text using line mode

Use this action to extract text from documents using regions (rectangles).

1. In the **Perform the following actions** box, click the **<Action>** link and select Extract | **Line Mode. The Extract Text tab - line mode** displays.

2. In the **Server** list, click the licensed rules agent server that you would like to use.

3. Under **Detect**, determine if you want to detect the text to extract by **Lines** or **Records**.
 - Select **Lines** if you want to use carriage control when specifying the position of variables on the page.
 - Select **Records** to count records, ignoring carriage control, when specifying the position of variables on the page.
4. In the **Format** list, click the data format.
5. In the **Code page** list, click the associated code page.
6. If desired, select **Banner mode**. Selecting this option allows the recognition string location to vary on the page. This will search the document for a recognition string. The recognition line becomes line 1 and the extraction variables will be relative to it.
 - a. In the **Search for** box, specify the text that defines the recognition string.
 - b. In the **Page** box, specify the page at which to start searching.
 - c. In the **Column** box, specify the column at which to start searching.
 - d. In the **Lines** boxes, enter the line numbers between which you would like to search.
7. Under **Extraction variables**, create one or more variables that will be used for bursting or extraction. You can add, modify, and remove variables using the buttons above the grid. To add a new variable, complete the following steps.
 - a. Click **New**. The **Text Extraction Variable Definition** dialog box displays.

Text Extraction Variable Definition - Line Mode

Name:

Description:

Type: ☒ Burst ☐ Extract

☐ Trim Spaces

Location on page:

Line/Record:

Column:

Extract: characters

Page selection:

☒ Page: of newly created burst document.

☐ First page with non-blank value in selected location

OK Cancel Help

- b. Enter the **Name**, **Description**, and **Type** of extraction variable. There are two types of extraction variables, those used for bursting and those used to extract data.
- c. If you want to remove spaces that exist at the start and end of the extracted text, select **Trim spaces**.

- d. Under **Location on page**, specify the **Line/Record** number from which the text will be extracted. If you are using record mode, it will be the record number of the current page (i.e., variables on page 2 and greater are relative to line 1 on that page). If you selected **Banner mode**, the recognition line becomes line 1 and the extraction variables are relative to it.
 - e. In the **Column** box, specify the start column for the extraction.
 - f. In the **Extract** box, enter the number of characters to extract.
 - g. Under **Page selection** specify the page of the newly created burst document from which you want to extract the text. You can enter a **Page** number or select **First page with non-blank value in selected location**.
 - h. Click **OK**.
8. From the **Set Document Properties** tab, configure the document properties for the newly created documents. The grid lists the property values that can be configured grouped in the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.
 - a. Expand the category of the property you want to configure. The first node level in the category determines the print preferences for the properties it contains. In the **Mode/Value** column, select how the property should be applied when a document is sent to a destination. You can choose from the following options:
 - **Always Apply** – Always applies the specified property value. Barr EOM will add commands to the print stream to enforce the print preference. If the document already contains commands for that print preference, Barr EOM will modify the commands to work with the printer family where the document is being sent.
 - **Apply Conditionally** – Applies the property value conditionally. Barr EOM will only add or modify commands for the print preference when the printer family that the document is destined for is different from the printer family the document was originally designed for.
 - **Informational Only** – Barr EOM makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.
 - b. Under each print preference are the parameters needed to generate that print preference. In the **Mode/Value** column, specify the document property value. You can use functions to insert and extract data as necessary. See section 3.13 “Use EOM functions” for more information.
 9. Click **OK** to save the business rule.

To extract text using page mode

Use this action to extract text from documents using regions (rectangles).

1. In the **Perform the following actions** box, click the **<Action>** link and select **Extract | Page Mode**. The **Extract Text tab - page mode** displays.

Extract Text - Page Mode

Extract Text | Set Document Properties

Server: <Select Server>

Server configuration:

Transform package:

New... Modify... Remove...

☐ Override input filter profile assigned to document.

Additional Parameters:

Extraction Variables:

New... Modify... Remove...

Name	Type	Description

OK Cancel Help

2. In the **Server** list, click the licensed transform server that you would like to use.
3. In the **Transform package** list, you can select an existing transform package or create one. Complete the following steps to create a transform package.
 - a. Click **New**. The **General** tab displays.
 - b. Enter the transform package **Name**.
 - c. Select a transform package **Type** of BarrEOM or DocBridge. DocBridge requires the purchase of a standalone version of the transform software and a separate license. DocBridge has more data types available.
 - d. If you select DocBridge, verify the **EXE path** is set to the correct folder. The default EXE path is @EOMTransformDir. To change the path, type in the box or click the ellipsis (...) button.

- e. Set the **Logging State**. The logging state determines if transform logs and temp files will be saved in the document folder. By default, the **Logging State** is set to Yes. All log files should be inspected during installation and pre-production testing to insure that fonts are correctly mapped. In a production system, the logging can be disabled to save disk space. If the transform operation returns an error (return code not zero), the log and temp files will not be deleted, and are available for troubleshooting.
- f. On the **Filter Profiles** tab, specify how the transform software will handle the formatting for each data type.
 - To configure a profile, click the ellipsis button in the **Modify/New** column for the appropriate formats. From the **Configure Filter Profile** dialog box, configure the profile as needed. The profile contains a communications and printer definition section.
 - To select a profile, click in the **Configuration** column for the appropriate formats and select the profile from the list.
- g. On the **Resources** tab, specify where the transform software will find the resources needed for the transformation. For example, PDF fonts are usually found at the location of an Adobe installation.
- h. On the **Fonts** tab, you can control the font mapping of input fonts to output fonts. The defaults are typically correct, but may need to be adjusted for special cases. You can add or modify fonts directly in the grid.
- i. Click **OK** to create the transform package.
4. Use the **Override input filter profile assigned to document** checkbox option to determine if you want to override the input filter profile assigned to the document or if you want to use the filter profile configured in the transform package. Select the checkbox to use the filter profile in the transform package.
5. In the **Additional Parameters** box, specify additional parameters needed for the transform software.
6. Under **Extraction variables**, create one or more variables that will be used for bursting or extraction. You can add, modify, and remove variables using the buttons above the grid. To add a new variable, complete the following steps.
 - a. Click **New**. The **Text Extraction Variable Definition** dialog box displays.
 - b. Enter the **Name**, **Description**, and **Type** of extraction variable. There are two types of extraction variables, those used for bursting and those used to extract data.
 - c. If you want to remove spaces that exist at the start and end of the extracted text, select **Trim spaces**.
 - d. Under **Location on page**, specify the region (rectangle) from which text will be extracted. This is done by entering the upper left corner's X and Y coordinates, width, and height. **Tip:** The region values can be found by viewing a document with the Barr EOM viewer. In the viewer, select View | Text Selection Mode in the menu bar. Then, drag the cursor to select the desired region. The coordinates will appear in the status bar.

- e. Under **Page selection** specify the page of the newly created document from which you want to extract the text. You can enter a **Page** number or select **First page with non-blank value in selected location**.
 - f. Click **OK**.
7. From the **Set Document Properties** tab, configure the document properties for the newly created documents. The grid lists the property values that can be configured grouped in the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.
 - a. Expand the category of the property you want to configure. The first node level in the category determines the print preferences for the properties it contains. In the **Mode/Value** column, select how the property should be applied when a document is sent to a destination. You can choose from the following options:
 - **Always Apply** – Always applies the specified property value. Barr EOM will add commands to the print stream to enforce the print preference. If the document already contains commands for that print preference, Barr EOM will modify the commands to work with the printer family where the document is being sent.
 - **Apply Conditionally** – Applies the property value conditionally. Barr EOM will only add or modify commands for the print preference when the printer family that the document is destined for is different from the printer family the document was originally designed for.
 - **Informational Only** – Barr EOM makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.
 - b. Under each print preference are the parameters needed to generate that print preference. In the **Mode/Value** column, specify the document property value. You can use functions to insert and extract data as necessary. See section 3.13 “Use EOM functions” for more information.
 8. Click **OK** to save the business rule.

To modify document contents

ADM (Advanced Document Modification) is a process where each page of the document is read, portions of the document can be changed, or values extracted, and then the page is written. Documents can be reordered, split, transformed to a different data type, bar codes added, OMR marks added, and logos changed using ADM. ADM can be executed in a business rule action or in the output process.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Modify Document Contents** | **Advanced Document Modification**. The **Configuration** tab displays.

The screenshot shows the 'Modify Document' dialog box with the 'Configuration' tab selected. The dialog is divided into three main sections: 'Server configuration:', 'Unit library configuration:', and 'Follow on actions:'.
- In the 'Server configuration:' section, there is a 'Server:' dropdown menu with the text '<Select Transform Server>', a 'Transform package:' dropdown menu, and three buttons: 'New...', 'Modify...', and 'Remove'. Below these is an 'Additional Parameters:' text field and a checkbox labeled 'Override input filter profile assigned to document.'.
- In the 'Unit library configuration:' section, there is a 'Unit library:' dropdown menu, three buttons: 'New...', 'Modify...', and 'Remove', and a group box 'Unit library will create:' containing three radio buttons: 'the same document' (selected), 'different document(s)', and 'multiple documents combined into one'.
- In the 'Follow on actions:' section, there is an 'Input document:' dropdown menu with the text 'Process next rule' and a line of text: 'Output document(s) will continue processing actions in current rule.'.
At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

2. In the **Server** list, click the licensed transform server that you would like to use.
3. In the **Transform package** list, you can select an existing transform package or create one for ADM. Complete the following steps to create an ADM transform package.
 - a. Click **New**. The **General** tab displays.
 - b. Enter the transform package **Name**.
 - c. Select a transform package **Type** of BarrEOM or DocBridgeAdvanced. DocBridgeAdvanced requires the purchase of a standalone version of the transform software and a separate license. DocBridgeAdvanced has more data types available.

- d. If you select DocBridgeAdvanced, verify the **EXE path** is set to the correct folder. The default EXE path is @EOMTransformDir. To change the path, type in the box or click the ellipsis (...) button.
- e. Set the **Logging State**. The logging state determines if transform logs and temp files will be saved in the document folder. By default, the **Logging State** is set to Yes. All log files should be inspected during installation and pre-production testing to insure that fonts are correctly mapped. In a production system, the logging can be disabled to save disk space. If the transform operation returns an error (return code not zero), the log and temp files will not be deleted, and are available for troubleshooting.
- f. On the **Filter Profiles** tab, specify how the transform software will handle the formatting for each data type.
 - To configure a profile, click the ellipsis button in the **Modify/New** column for the appropriate formats. From the **Configure Filter Profile** dialog box, configure the profile as needed. The profile contains a communications and printer definition section.
 - To select a profile, click in the **Configuration** column for the appropriate formats and select the profile from the list.
- g. On the **Resources** tab, specify where the transform software will find the resources needed for the transformation. For example, PDF fonts are usually found at the location of an Adobe installation.
- h. On the **Fonts** tab, you can control the font mapping of input fonts to output fonts. The defaults are typically correct, but may need to be adjusted for special cases. You can add or modify fonts directly in the grid.
- i. Click **OK** to create the transform package.
4. In the **Additional Parameters** box, specify additional parameters needed for the transform software.
5. Use the **Override input filter profile assigned to document** checkbox option to determine if you want to override the input filter profile assigned to the document or if you want to use the filter profile configured in the transform package. Select the checkbox to use the filter profile in the transform package.
6. In the **Unit library** list, you can select an existing unit library or create one. Unit libraries are JavaScript modules that CpMill calls at certain known times while processing a document (for example, begin document, page start, page end, etc.). The modules can modify the contents of the document, extract information from the document, write the document, or parts of it, to a new location, or perform many other operations. For more information on configuring unit libraries, contact Barr Systems LLC Professional Services. Complete the following steps to create a unit library.
 - a. Enter the unit library **Name**, **Description**, and any **Comments**.
 - b. In the **Document Properties Needed** list, select the document properties needed by the unit library. These properties will be written to a file called <filename>.properties when Barr EOM calls the document modification software. This file can be opened and read in by the unit library.

- c. In the **Filters Needed** list, select the filters needed for the unit library. These filters will be written to a temporary location which will be sent to the document modification software.
- d. Under **Unit**, specify the unit library. Enter the unit library code at the bottom of the text where the <--put code here--> line is shown.



Review the default comments of a new unit library for descriptions of the parameters sent from EOM to the unit library and information about how to tell EOM about the documents modified or created by the unit library.

- e. If necessary, click **Reload Variables from Unit** to populate the **Output variables** grid with any output variables defined in the unit library.
 - f. Click **OK**.
7. Next to **Unit library will create** select one of the following options:
 - **the same document** – Select if your unit library is modifying the input document and writing it to the same location. See the default comments in unit library for how to tell EOM the names of the new documents that are created.
 - **different document(s)** – Select if your unit library is modifying the current document and outputting it into a new document, or if your unit library is bursting the document into many different documents. See default comments in unit library for how to tell EOM the names of the new documents that are created
 - **multiple documents combined into one** – Currently not available.
 8. Under **Follow-on action**, specify the action you would like the input document (original document) to take after this rule has been processed. You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.
 9. From the **Document properties** tab, configure the document properties for the newly created documents. The grid lists the property values that can be configured grouped in the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.
 - a. Expand the category of the property you want to configure. The first node level in the category determines the print preferences for the properties it contains. In the **Mode/Value** column, select how the property should be applied when a document is sent to a destination. You can choose from the following options:
 - **Always Apply** – Always applies the specified property value. Barr EOM will add commands to the print stream to enforce the print preference. If the document already contains commands for that print preference, Barr EOM will modify the commands to work with the printer family where the document is being sent.

- **Apply Conditionally** – Applies the property value conditionally. Barr EOM will only add or modify commands for the print preference when the printer family that the document is destined for is different from the printer family the document was originally designed for.
 - **Informational Only** – Barr EOM makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.
- b. Under each print preference are the parameters needed to generate that print preference. In the **Mode/Value** column, specify the document property value. You can use functions to insert and extract data as necessary. See section 3.13 “Use EOM functions” for more information.

10. Click **OK**.

To route to destinations (Advanced)

Use this action to use a .csv file to dynamically pick destinations based on a document property.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Route to Destinations | Advanced**. The **Route to destination (Advanced)** dialog box is displayed.

2. Select how you want to locate the .csv file. You can use one of the following options:
 - **Path** – Enter the path and file name of the .csv file, or click the Browse (...) button to navigate to the file.
 - **Resource** – Select the appropriate resource from the list, or click the Browse button to choose the resource from the **Manage CsvDocProp Resources** dialog box.

3. In the **Lookup data** box, right-click and select the document property that will control the routing. The value contained in this document property will determine the row used in your .csv file.



For example, the following table shows an example .csv file using the Class property. To route by Class using this example, select **Class** in the **Lookup data** box, enter **MyClass** in the **Key column name** box, and **MyPrinter** in the **Destination column name** box. When the document is routed the value of the Class property will determine which destination is used. For example, if the Class value is A, the document will be routed to printer 1.

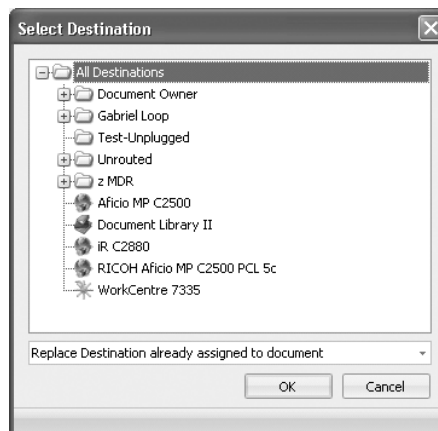
MyClass	MyPrinter
A	printer1
B	printer2
C	printer3

4. In the **Key column name** box, enter the column name in your .csv file that corresponds to the selected document property.
5. In the **Destination column name** box, enter the column name in your .csv file that contains the destination name where you want the documents routed.
6. In the list below the tree, choose if you want to replace the destination already assigned to the document or use multiple destination routing and add to the destination already assigned to the document.
7. Click **OK**. A new routing action is shown in the actions box. The action lists all of the selected destinations.

To route to destinations (Basic)

Use this action to specify the destinations where documents should be sent.

1. In the **Perform the following actions** box, click the **<Action>** link and select Route to Destinations | **Basic**. The **Select Destination** dialog box is displayed.



2. Select the appropriate destinations in the tree. To select multiple items, press the CTRL or SHIFT key and select destinations. Selecting a destination group will select all destinations in that group.
3. In the list below the tree, choose whether you want to replace the destination already assigned to the document or use multiple destination routing and add to the destination already assigned to the document.
4. Click **OK**. A new routing action is shown in the actions box. The action lists all of the selected destinations.

To set document properties

Use this action to configure document properties.

1. In the **Perform the following actions** box, click the **<Action>** link and select Set Document Properties | **Basic**. The **Set Document Properties** dialog box is displayed.

Edit Value	Property	Value	Description
☐	Bind	None	Indicates whether or not to bind the document.
☐	Class		The class assigned to the document.
☐	Collate	True	Indicates whether or not to collate the document.
☐	Color		Indicates that the document contains color.
☐	Copies	1	Number of copies of the document.
☐	Data Type	BIN	Identifies the type of data contained within this docum...
☐	Document Name		Name assigned to documents received from this device.
☐	Document State		
☐	Duplex	One Sided	Indicates whether duplexing should be used for the do...
☐	Form Name		The name of the form this document should be printed ...

2. In the grid, select the **Edit Value** check boxes for the properties you want to edit. All the rows you selected are now enabled for editing.
3. Click in the **Value** column to edit the property.



If necessary, you can use functions to extract data from a document property (e.g. Document Name).

4. Click **OK**.

To transform documents using the Adept transform suite

Use this action to transform documents using the Adept transform suite.



If needed, you can use the **Data Conversion Utility** to create custom DCOs for converting data formats. This will not be necessary for most users. If you think this conversion is necessary, please contact Barr Systems Technical Support to ensure the data is converted properly.

1. In the **Perform the following actions** box, click the **<Action>** link and select Transform Document | **Adept**. The **Transform Adept** dialog box displays.

2. In the **Server** list, click the licensed rules agent server that you would like to use.
3. Under **Parameters**, configure the following options as needed:
 - Next to **Convert from** select the format you are converting from **Xrx** and/or **Afp**.
 - In the **to** list, specify the format you are converting to.
 - Specify the **Ini** resource that will control the format of the printed output. You can select a defined Ini resource in the list or click Browse to create, modify, or import Ini resources from the **Resource Manager** dialog box. Ini resources are created using the **Ini Resource** dialog box.
 - Specify the **Ini description**.
 - In the **Ini default** list, select the Ini resource that will be used as the default.
 - In the **Exe path** box, click the Browse button and select the Adept exe path.
4. Select the **Follow on actions** for the input document (original document). You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.
5. Click **OK**.

To transform documents using Page Mode

Use this action to transform the format of a printer ready document to a new format, and/or to another data type.

1. In the **Perform the following actions** box, click the **<Action>** link and select Transform Document | **Page Mode**. The **Configure Transform** dialog box is displayed.

Configure Transform

Server configuration:

Server: EOMLAB2K8

Transform package:

New... Modify... Remove

Format configuration:

Output format:

Input formats:

Format	Configuration	Modify/New

Follow on actions:

Input document: Process next rule

Output document will continue processing actions in current rule.

OK Cancel Help

2. In the **Server** drop-down box, click the licensed transform server that you would like to use.
3. In the **Transform package** list, you can select an existing transform package or create one. Complete the following steps to create a transform package.
 - a. Click **New**. The **General** tab displays.
 - b. Enter the transform package **Name**.
 - c. Select a transform package **Type** of BarrEOM or DocBridge. DocBridge requires the purchase of a standalone version of the transform software and a separate license. DocBridge has more data types available.
 - d. If you select DocBridge, verify the **EXE path** is set to the correct folder. The default EXE path is @EOMTransformDir. To change the path, type in the box or click the ellipsis (...) button.

- e. Set the **Logging State**. The logging state determines if transform logs and temp files will be saved in the document folder. By default, the **Logging State** is set to Yes. All log files should be inspected during installation and pre-production testing to insure that fonts are correctly mapped. In a production system, the logging can be disabled to save disk space. If the transform operation returns an error (return code not zero), the log and temp files will not be deleted, and are available for troubleshooting.
 - f. On the **Filter Profiles** tab, specify how the transform software will handle the formatting for each data type.
 - To configure a profile, click the ellipsis button in the **Modify/New** column for the appropriate formats. From the **Configure Filter Profile** dialog box, configure the profile as needed. The profile contains a communications and printer definition section.
 - To select a profile, click in the **Configuration** column for the appropriate formats and select the profile from the list.
 - g. On the **Resources** tab, specify where the transform software will find the resources needed for the transformation. For example, PDF fonts are usually found at the location of an Adobe installation.
 - h. On the **Fonts** tab, you can control the font mapping of input fonts to output fonts. The defaults are typically correct, but may need to be adjusted for special cases. You can add or modify fonts directly in the grid.
 - i. Click **OK** to create the transform package.
4. Use the **Override input filter profile assigned to document** checkbox option to determine if you want to override the input filter profile assigned to the document or if you want to use the filter profile configured in the transform package. Select the checkbox to use the filter profile in the transform package.
 5. In the **Output format** list, click the format of the output file.
 6. Configure the conversion of each input format in the **Input formats** grid and then click **OK**.
 - For all unlicensed input formats and any input formats you don't want to use, click in the **Configuration** column and select **Do Not Transform**.
 - For licensed input formats, you can select **Use Default Options** or select a predefined configuration in the **Configuration** column. To configure a custom input format, click the ellipsis button in the **Modify/New** column. If **Use Default Options** or **Do Not Transform** is selected in the **Configuration** column, a new configuration will be created. If a predefined configuration is selected, that configuration will be modified. The custom transform options are configured on the **Input options** tab, **Output options** tab, and **Page Layout** tab.
 7. Select the **Follow on actions** for the input document (original document). You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.
 8. Click **OK**.

To transform documents using Record Mode (Advanced)

This advanced option is used to perform custom conversions using DCO chains. This provides flexibility to specify code pages, carriage controls, record formats, etc. for the incoming document and the output desired.



If needed, you can use the **Data Conversion Utility** to create custom DCOs for converting data formats. This will not be necessary for most users. If you think this conversion is necessary, please contact Barr Systems Technical Support to ensure the data is converted properly.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Transform Document | Record Mode (Advanced)**. The **Transform Record Mode (Advanced)** dialog box is displayed.

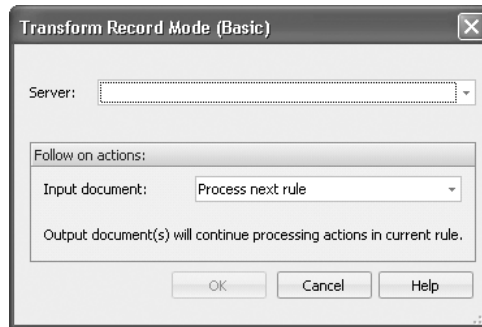
2. In the **Server** list, click the licensed rules agent server that you would like to use.
3. Under **Parameters**, configure the following options as needed:
 - In the **Code page in** box, specify the code page that represents the current status of the input document. The default format is 037 (EBCDIC).
 - In the **Code page out** box, specify the code page that represents how the file is being transformed. The default format is 437 (ASCII).

- In the **FCB** list, select the FCB resource that will control the vertical format of printed output. You can select a defined FCB in the list or click the ellipsis (...) button to create, modify, or import FCBs from the **Resource Manager** dialog box. FCBs are created using the **FCB Resource** dialog box. The default FCB is STD, a predefined FCB with 66 lines and channel stop 1 on line 1.
 - In the **FCB description** field, click to view/update the description of the selected FCB.
 - In the **FCB default** list, select the default FCB. The default is STD, a redefined FCB with 66 lines and channel stop 1 on line 1.
 - In the **In type** box, specify the input data type.
 - In the **Out type** box, specify the output data type.
 - In the **Data type after conversion** list, select the data type of the output documents.
 - In the **Use block lengths** list, determine if you want to enable or disable the use of block lengths in the record. When this option is selected, records include a block count. The block count will directly precede the record count.
 - Use the **FCB override** list to enable or disable overriding FCBs. Selecting Yes causes FCBs in the beginning of the data to be ignored, functioning as if there were no FCBs in the data.
 - Use the **Send FCB** list to enable or disable sending FCBs to the printer.
 - In the **Delimiter** list, select the type of delimiter you want to use. Choose one of the following:
 - **None** - Records do not include delimiter characters.
 - **ASCII** - Records include an ASCII delimiter. Each record ends in a carriage return and line feed character. The actual record length is two bytes more than the fixed record length specified above.
 - **EBCDIC** - Records include an EBCDIC delimiter. Each record ends in a carriage return and line feed character. The actual record length is two bytes more than the fixed record length specified above.
 - Use the **Truncate trailing blanks** list to enable or disable the truncating of trailing blanks.
 - Use the **Pad record** list to enable or disable pad record. Selecting Yes pads blank records with a space.
 - Use the **Pad skip1** list to enable or disable pad skip to channel 1. Selecting Yes pads blank records with a space.
 - In the **Length** box, specify the length of the fixed records. The default value is 80.
4. Select the **Follow on actions** for the input document (original document). You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.
 5. Click **OK**.

To transform documents using Record Mode (Basic)

Use this action to perform the most common transforms for data coming from a Barr Enterprise Print Server device. This converts .tnj to ASCII text, .anj to AFP, and .bnj to .bin.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Transform Document | Record Mode (Basic)**. The **Transform Record Mode (Basic)** dialog box is displayed.



2. In the **Server** list, click the licensed rules agent server that you would like to use.
3. Select the **Follow on actions** for the input document (original document). You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.
4. Click **OK**.

To analyze documents

Use this action to process documents and populate document properties.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Analyze Document**. The **Analyze Document** dialog box is displayed.
2. In the drop-down list, select the server where the document should be analyzed.
3. Use the check box options to determine the document properties that should be populated. Select the properties you want populated.
 - **Use quick page counting for PDF documents** – Enables optimized page counting for PDF jobs. When this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
 - **Count pages** – Reads the entire document and sets the total number of pages for the document.
 - **Detect data type** – Reads the first portion of the document and attempts to determine the document's data type. This works well for postscript, PDF, and PCL files.

- **Detect trays** – Looks for input and output tray settings.
 - **Detect color** – Reads the entire document looking for pages that contain color information.
 - **Detect duplex** – Looks for duplex commands in the document.
4. Click **OK**.

To assign document folders

Use this action to assign documents to specific document folders.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Assign to Document Folder**. The **Select Document Folder** dialog box is displayed.



2. Select the appropriate folder in the tree.
3. Click **OK**.

To convert fixed block to variable block

Use this action to convert FBA to VBA and FBM to VBM. It can be used when dealing with mainframe tape formats.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Convert Fixed Block to Variable block**.
2. Specify the fixed block record length in bytes.
3. Click **OK**.

To delete documents

Use this action to delete documents.

In the **Perform the following actions** box, click the **<Action>** link and select **Delete Document**. No additional configuration is required.

To move documents to a file store

Use this action to move documents to another location (file store).

1. In the **Perform the following actions** box, click the **<Action>** link and select **Move Document To File Store**. The **Move Document To File Store** dialog box displays.
2. In the **File Store** list, select the new file store location. The list displays all file stores defined in the **Set General Preferences Utility**.
3. Click **OK**.

To prepend a banner

Use this rule to add a banner to the beginning of a package. The banner will be added as a separate document within the same package.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Package Banner**. The **Package and Prepend banner** dialog box displays.
2. In the **Resource** list, select an existing banner resource, or click **New** to create a banner resource from the **Banner Resource** dialog box. See the *Configuring a banner resource* Help topic for instructions on creating a banner resource.
3. Click **OK**.

To create power rules

Use this action to create a power rule for building multiple rules inside of one rule.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Power Rule**. The **Power Rule** dialog box displays. Each rule contained in the power rule is represented as one row spanning the **Conditions** and Actions grids.

Power Rule

Select conditions Select actions

Conditions	
Document Name	
Operator	Value
> Is Equal To	

Actions
Route To Destination
> Unrouted

Add
Remove
Copy
Move up
Move down

OK Cancel Help

2. To manage the condition statements, click **Select conditions** and use the following procedures from the **Select Conditions** dialog box. When you are finished working with conditions, click **OK**.
 - To add conditions to the rule, select the appropriate conditions in the **Available conditions** list and click **Add**. The conditions are moved to the **Selected conditions** list. When you click **OK**, the new conditions will be displayed as columns in the **Conditions** grid.
 - To remove conditions from the rule, select the appropriate conditions in the **Selected conditions** list and click **Remove**. The conditions are moved to the **Available conditions** list. When you click **OK**, these conditions will be removed from the **Conditions** grid.
 - Conditions are processed in the **Selected conditions** list order, from top to bottom. To change the condition processing order, select a condition and click **Move up** or **Move down**. When you click **OK**, the new order will display in the **Conditions** grid.
3. Configure the condition statements by clicking directly **Conditions** grid. For each rule, you must specify the **Operator** and **Value**. If you have more than one condition, you will also need to select the **Conjunction**, either AND or OR.
4. To manage the action statements, click **Select actions** and use the following procedures from the **Select Actions** dialog box. When you are finished working with actions, click **OK**.
 - To add actions to the rule, select the appropriate actions in the **Available actions** list and click **Add**. The actions are moved to the **Selected actions** list. When you click **OK**, the new actions will be displayed as columns in the **Actions** grid.
 - To remove actions from the rule, select the appropriate actions in the **Selected actions** list and click **Remove**. The actions are moved to the **Available actions** list. When you click **OK**, these actions will be removed from the **Actions** grid.
 - Actions are processed in the **Selected actions** list order, from top to bottom. To change the action processing order, select an action and click **Move up** or **Move down**. When you click **OK**, the new order will display in the **Actions** grid.
5. Click directly in the **Actions** grid to configure the action statements for each rule.
 - **Route to Destination** – Click the Browse (...) button to display the **Destinations** dialog box. Select the appropriate destinations in the tree. You can select multiple destinations by pressing the CTRL or SHIFT keys and selecting the destinations. Selecting a destination group will select all destinations in that group. When finished, click **OK**.
 - **Set Document Folder** – Click the Browse button to display the **Document Folders** dialog box. Select the appropriate folders in the tree. You can select multiple folders by pressing the CTRL or SHIFT keys and selecting folders. When finished, click **OK**.

- **Set Document Library** – Select an existing profile from the list or click the Browse button to create or manage profiles from the **Manage Document Library Profiles** dialog box.
 - **Set Document Owner** – From the **User and Group Selection** dialog box, select the appropriate user or group in the grid. If the desired user or group is not listed, click **More Users** to search for additional users. Click **OK**.
 - **Set Document State** – In the list, select one of the following document states: **Any**, **Ready**, **Hold** or **Error**.
 - **Set Failover Profile** – Select an existing profile from the list or click the Browse button to create or manage profiles from the **Manage Failover Profiles** dialog box.
 - **Set Notification Profile** – Select an existing profile from the list or click the Browse button to create or manage profiles from the **Manage Notification Profiles** dialog box.
 - **Set Output Process** – Select an existing profile from the list or click the Browse button to create or manage profiles from the **Manage Output Process Profiles** dialog box.
 - **Set Schedule** – Click the Browse button to display the **Schedule** dialog box. Specify the appropriate **Day** and **Time** options. You can choose to print the documents today, on a specific day, or in the future. Click **OK**.
6. Use the following procedures to control the individual rules contained in the power rule. Each rule is represented as one row spanning the **Conditions** and **Actions** grids.
 - To create a rule, click **Add**. A row will be added to the bottom of both grids.
 - To delete a rule, select a rule and click **Remove**. The selected row will be deleted from both grids.
 - To create a copy of a rule, select a rule and click **Copy**.
 - To reorder the rules, select a rule and click **Move up** or **Move down**.
 7. Click **OK**.

To run ad hoc rules

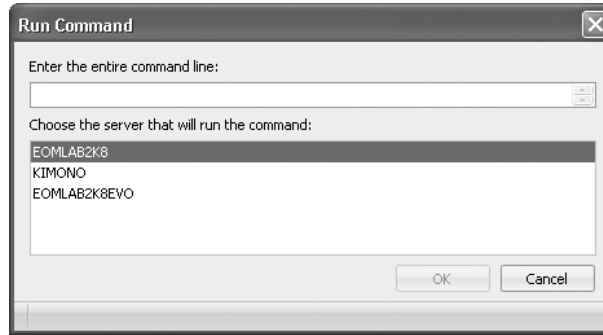
Use this action to run an existing ad hoc rule.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Run AdHoc Rule**.
2. In the **AdHoc rule** list, select an existing ad hoc rule.
3. In the **Run mode** list, choose if you want to run the rule against all documents in the spool or against all newly received documents since the last time the rule was run. The rule will not be run against retained documents.
4. Click **OK**.

To run commands

Use this action to perform a command line operation.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Run Command**. The **Run Command** dialog box is displayed.



2. Type the command line. To insert document properties in the command line, right-click in the text box and select **Insert Document Property**. Some sample document properties are date/time, document name, and data type. To insert functions, right-click in the box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions.
3. Choose the sever you want to run the command.
4. Click **OK**.

To schedule output

Use this action to schedule documents to print at a specific date and time.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Schedule Output**. The **Schedule** dialog box is displayed.

Schedule

Print the document on or after...

Day

☒ Today

☐ Specific date: 11/12/2008

☐ Specific day of the week: Wednesday

☐ Specific day of the month: 12

☐ Last day of the month.

☐ Days in the future: 1

Time

☒ As soon as possible.

☐ Specific time: 2:43:50 PM

☐ Hours : Minutes in the future: 01:00

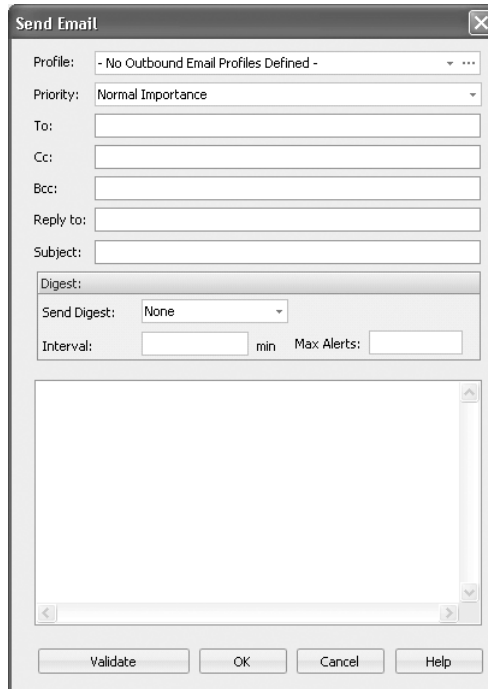
Clear OK Cancel

2. Set the appropriate **Day** option. You can choose to print the documents today, on a specific day, or in the future.
3. Set the appropriate **Time** option. You can choose to print as soon as possible, at a specific time, or in the future.
4. Click **OK**.

To send emails

Use this action to send email messages when specific events occur in the document life cycle.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Send Email**. The **Send Email** dialog box is displayed.

The image shows a 'Send Email' dialog box with a title bar and a close button. It contains several input fields: 'Profile' (a dropdown menu showing '- No Outbound Email Profiles Defined -'), 'Priority' (a dropdown menu showing 'Normal Importance'), 'To:', 'Cc:', 'Bcc:', 'Reply to:', and 'Subject:'. Below these is a 'Digest:' section with a 'Send Digest:' dropdown (set to 'None') and 'Interval:' and 'Max Alerts:' input fields. At the bottom is a large text area for the email body. The dialog box has four buttons at the bottom: 'Validate', 'OK', 'Cancel', and 'Help'.

2. Select a **Profile** from the drop-down list. You can also click the Browse button to display the **Manage Outbound Email Profiles** dialog box. This dialog box lists all of the defined email profiles. From this dialog box, you can create, import, and export profiles, as well as manage all existing profiles. To create a new email profile, click **New** and configure the email profile from the **Outbound Email Profile** dialog box. When you are finished, click **OK**, and then click **Close**.
3. From the **Send Email** dialog box, select the Priority level of the email message. You can select an importance level of normal, low, or high.
4. Enter the email addresses that will be notified in the **To**, **CC**, and **Bcc** fields. You can enter multiple email addresses separated by a comma.
5. In the **Reply to** field, enter an email address for replies. You can enter multiple email addresses separated by a comma.
6. Enter the email **Subject** text.

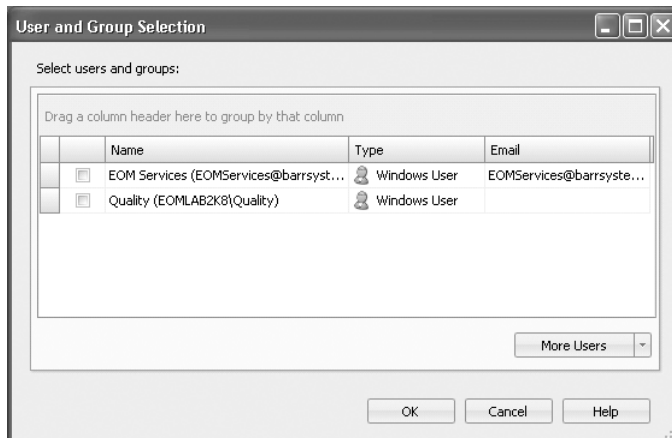
7. Under **Digest**, determine if you want to send the notification messages for multiple events concatenated into one email. To enable the digest feature, in the **Send Digest** list, choose from the following options:
 - **Every interval** – Sends the digest according to the time interval specified. You will receive a message every interval, even if no alerts were received during the interval.
 - **At time interval** – Sends the digest according to the time interval specified. The time interval will start when the first notification messages is received. You will be notified when at least one notification has been received.
 - **Every hour** – Sends the digest every hour. You will receive a message every interval, even if no alerts were received during the interval.
 - **Every half hour** – Sends the digest every half hour. You will receive a message every interval, even if no alerts were received during the interval.

If necessary, specify the **Interval** in minutes. In the **Max Alerts** box, you can specify the maximum number of alerts to be included in the digest.
8. Enter the body text. To insert document properties in the body text, right-click in the text box, select **Insert Document Property**, and choose the appropriate properties. The values of the properties will display in the email message. To insert functions, right-click in the box, select **Insert Function**, and choose the appropriate function. Review the *Using EOM functions* help topic for information on configuring functions.
9. To validate the body text, click **Validate**.
10. Click **OK**.

To set document owners

Use this action to configure the document owner.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Set Document Owner**. The **User and Group Selection** dialog box is displayed.



2. Select the appropriate user or group in the grid. If the desired user or group is not listed, click **More Users** to search for additional users. See the “Add users and groups to Barr EOM” section for detailed procedures on adding users.
3. Click **OK**.

To set document states

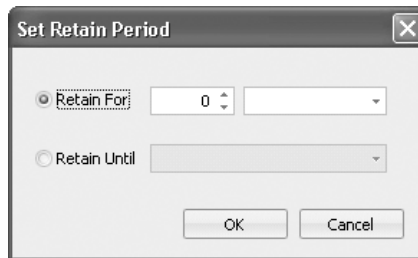
Use this action to set the state of documents to hold or ready.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Set Document State**. The **Set Document State** dialog box is displayed.
2. From the drop-down list, select a document state of **Hold** or **Ready**.
3. Click **OK**.

To set retain periods

Use this action to determine how long documents will be retained.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Set Retain Period**. The **Set Retain Period** dialog box is displayed.



2. Set the retain period:
 - To retain for a specified time length, use the **Retain For** options.
 - To retain until a specific date and time, use the **Retain Until** options.
3. Click **OK**.

To unpack documents

Use this action to separate multi-document packages into individual documents.

In the **Perform the following actions** box, click the **<Action>** link and select **Delete Unpackage**. No additional configuration is required.

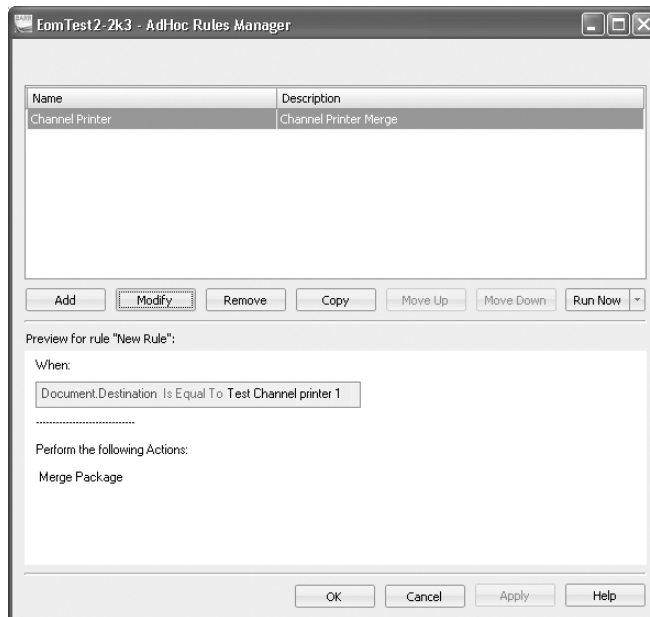
3.12 Work with ad hoc rules

Ad hoc rules are used for documents that exist in Barr EOM, where business rules are used for documents as they enter Barr EOM. Ad hoc rules can be initiated by scheduling a task in the Schedule Manager, by using the Run Now option in the AdHoc Rules Manager, or by running a configured rule from the Documents grid or business rules. An example use for ad hoc rules is to merge a set of documents into a package.

Manage ad hoc rules

The following procedure provides the basic steps for managing ad hoc rules.

1. From the EOM Console menu bar select Tools | **AdHoc Rules**. The **AdHoc Rules Manager** dialog box displays. The ad hoc rules grid lists all of the defined ad hoc rules in the order they will be processed. Selecting a rule will display the rule for preview below the grid. To modify the rule, double-click the row.



2. Under the ad hoc rules grid, use the following procedures to configure rules.
 - To create a rule, click **Add**. The **AdHoc Rule** dialog box displays.
 - To modify a rule, select a rule and click **Modify**.
 - To delete a rule, select a rule and click **Remove**.
 - To create a copy of a rule, select a rule and click **Copy**. To rename the rule, double-click the rule or select the new rule and click **Modify**.

- To reorder the rules, select a rule and click **Move Up** or **Move Down**.
 - To run a selected rule now, select a rule and click **Run Now**. A menu will display where you can choose to run the rule against all documents in the spool or against all newly received documents since the last time the rule was run. The rule will not be run against retained documents.
3. Click **OK** or **Apply** to save your changes.

Create ad hoc rules

Use the following procedure to create an ad hoc rule. You will configure conditions and actions.

1. From the EOM Console menu bar select Tools | **AdHoc Rules**. The **AdHoc Rules Manager** dialog box displays.
2. Under the ad hoc rules grid, click **Add**. The **AdHoc Rule** dialog box displays.

New AdHoc Rule

Name:

Description:

Rule definition: ☒ Always execute this rule (no conditions)

When:

☐ ☐

Perform the following actions:

☐ Allowed for document right click

3. Enter a rule **Name** and **Description**.
4. If you want to apply the rule to all documents, select the **Always execute this rule (no conditions)** check box. This will disable the **When** box as no condition statements are needed. If you select this option, skip the steps for configuring conditions.

5. Use the **When** box to create and manage the rule conditions. Multiple conditions can be created and organized into groups. A blue box is used to indicate a condition group. To create a rule condition, perform the following steps.
 - a. In the **When** box, click the **<Target>** link. Use the list to select the appropriate condition.
 - b. Click the **Operation** link and select the appropriate operation.
 - c. Click the **Value** link and select the appropriate value. This condition statement is now completed.

To include additional condition statements or create groups of conditions:

 - Select a condition radio button (inside the box) to enable the **Add Condition** and **Remove Condition** buttons for adding and removing condition statements.
 - Select a group radio button (outside the box) to enable the **Add Group** and **Remove Group** buttons for adding and removing groups. This will also enable the **Add Condition** button for adding a condition to the selected group.
6. Under **Perform the following actions** box, use the following procedures to manage actions.
 - To create an action, click the **<Action>** link and select one of the following actions. See the “Create ad hoc actions” section for detailed procedures.
 - **Run Business Rules** – Specifies if you want to run business rules against input or output documents.
 - **Set Document Properties** – Configures document properties.
 - **Delete Document** – Deletes documents.
 - **Set Priority in Group** – Sets the priority (print order) in a group.
 - **Assign to Document Folder** – Assigns documents to specific document folders.
 - **Set Document Owner** – Configures the document owner.
 - **Route to Destinations** – Specifies the destinations where documents should be sent.
 - **Set Document State** – Sets the document state to hold or ready.
 - **Create Package** – Configures a package of documents.
 - **Zip Package** – Zips the merged document or any other documents in Barr EOM.
 - **Merge Package** – Configures the document properties of the merged file.
 - To create additional actions, click **Add Action**.
 - To modify an action, click the desired action link or click the area next to the link and click **Modify Action**.

- To delete an action, click the area next to the link and click **Remove Action**.
 - To reorder the actions, click the area next to the action link and click **Move Up** or **Move Down**.
7. Move the actions to their appropriate position by clicking the area next to the action link and clicking **Move Up** or **Move Down**. The order of ad hoc rule actions is important, as the action behavior can depend on where it occurs in the sequence of actions. By default the actions apply to the targeted documents. For example, if your rule contains a **Create Package** action, the create package will act upon the targeted documents. In contrast, actions that follow an action that produces documents, will apply to the produced documents. Using the previous example, if following the **Create Package** action you have a **Merge Package** action followed by a **Set Document Properties** action, a **Set Document State** action, and a **Route to Destination** action, the merge package action will apply to the package created by the **Create Package** action, and the latter three actions will apply to the resultant merged documents from the **Merge Package** action. If you had a **Set Document Properties** action that preceded the **Create Package** action, it would apply to the original targeted documents.
 8. Click **OK** to save your ad hoc rule.
 9. You can run ad hoc rules using the following procedures.
 - Schedule a task to run the ad hoc rule using the **Schedule Manager**. See section 3.14, “Scheduling tasks” for more information.
 - Use the **Run Now** option on the **AdHoc Rules Manager** dialog box to run a selected rule. You can run the rule against all documents in the spool or against all newly received documents since the last time the rule was run. The rule will not be run against retained documents.
 - In the Documents grid, select one or more documents, right-click, and select **Run Adhoc Rule**. You can run any of the rules listed in the submenu. Only rules with the **Allowed for document right click** option selected on the **AdHoc Rule** dialog box are displayed in the menu.
 - From business rules, configure the **Run Adhoc Rule** action.

Create ad hoc actions

You can create the following ad hoc rule actions.

Run business rules	Route to destinations
Set document properties	Set the document state
Delete documents	Create a package of documents
Set the priority in a group	Create a zip package
Assign to document folder	Create a merge package
Set document owners	

To run business rules

Use this action to determine if you want to run business rules against input or output documents.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Run Business Rules**. The **Run Business Rules** dialog box displays.
2. Select if you want to run business rules against **Input** documents and/or **Output** documents.
3. Click **OK**.

To set document properties

Use this action to configure document properties.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Set Document Properties**. The **Document Properties** dialog box displays.
2. In the grid, configure the document properties. The grid lists the property values that can be configured grouped in the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.
 - a. Expand the category of the property you want to configure. The first node level in the category determines the print preferences for the properties it contains. In the **Mode** column, select how the property should be applied when a document is sent to a destination. Click in the grid cell and choose from the following options:
 - **Always Apply** – Always applies the specified property value. Barr EOM will add commands to the print stream to enforce the print preference. If the document already contains commands for that print preference, Barr EOM will modify the commands to work with the printer family where the document is being sent.
 - **Apply Conditionally** – Applies the property value conditionally. Barr EOM will only add or modify commands for the print preference when the printer family that the document is destined for is different from the printer family the document was originally designed for.
 - **Informational Only** – Barr EOM makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.
 - b. Under each print preference are the parameters needed to generate that print preference. In the **Value** column, specify the document property value. You can use functions to insert and extract data as necessary. See section 3.13 “Use EOM functions” for more information.
3. Click **OK**.

To delete documents

Use this action to delete documents.

In the **Perform the following actions** box, click the **<Action>** link and select **Delete Document**. No additional configuration is required.

To set the priority in a group

Use this action to set the print order when multiple documents are packaged together. The order of the document properties set by this action determines the print order when sent to the destination.



Example package:

Doc 1: Priority 1 Total Pages: 5
Doc 2: Priority 2 Total Pages: 2

If **Priority in Group** is set to Priority (1st) and Total Pages (2nd) the documents would print in Doc 1, Doc 2 order.

If **Priority in Group** is reversed and set to Total Pages, Priority the documents would print in Doc 2, Doc 1 order.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Set Priority in Group**. The **Set Priority In Group** dialog box displays.
2. In the **Ordering properties** list, select the properties that you want to determine the print order. As you select properties, they are moved to the **Selecting order** list.
3. To configure the order, select properties in the **Selecting order** list and click **Move up** and **Move down** as necessary.
4. Click **OK**.

To assign to a document folder

Use this action to assign documents to specific document folders.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Assign to Document Folder**. The **Select Document Folder** dialog box displays.
2. Select the appropriate folder in the tree.
3. Click **OK**.

To set document owners

Use this action to configure the document owner.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Set Document Owner**. The **Set Document Owner** dialog box displays.
2. You can determine the document owner from a user reference property. To do this, select **Calculate document owner from user reference property** and select **User, Group, or User or Group**.
3. To specify a default owner, click the Browse button and select appropriate the user or group from the **User and Group Selection** dialog box. If the desired user or group is not listed, click **More Users** to search for additional users.
4. Click **OK**.

To set the document state

Use this action to set the state of documents to hold or ready..

1. In the **Perform the following actions** box, click the **<Action>** link and select **Set Document State**. The **Set Document State** dialog box displays.
2. From the list, click the appropriate document state, **Hold** or **Ready**
3. Click **OK**.

To route to destinations

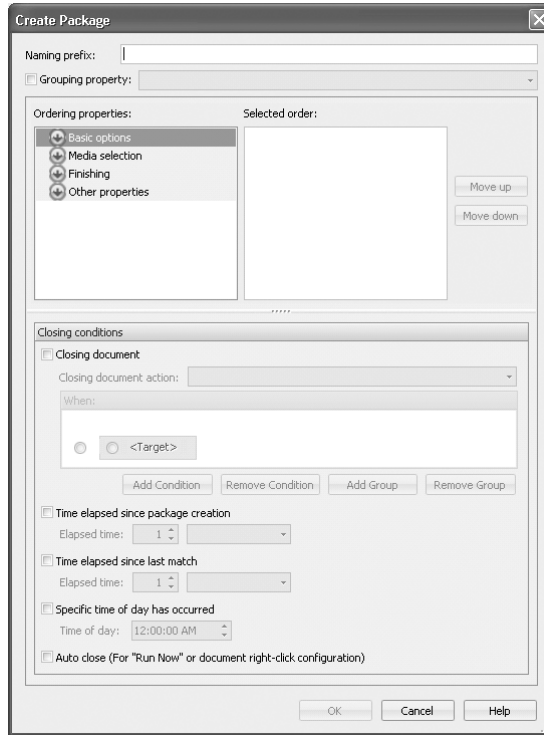
Use this action to specify the destinations where documents should be sent.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Route to Destination(s)**. The **Select Destination** dialog box displays.
2. Select the appropriate destinations in the tree. You can select multiple destinations by pressing the CTRL or SHIFT keys and selecting destinations. Selecting a destination group will select all destinations in that group.
3. In the list below the tree, choose if you want to replace the destination already assigned to the document or use multiple destination routing and add to the destination already assigned to the document.
4. Click **OK**. A new routing action is shown in the actions box. The action lists all of the selected destinations.

To create a package of documents

Use this action to create a package of documents. This will take all of the documents that meet the criteria and put them in a multiple document package.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Create Package**. The **Create Package** dialog box displays.



2. Enter the **Naming prefix** for the package document. This prefix will be added to all packages created by this action. The naming prefix is especially useful when the create package action will be run by a scheduled rule. Each time the rule runs and generates a new package, the prefix will added. If you have multiple scheduled rules running that generate different packaging, you will be able to distinguish the resulting packages based on the original rule. It does not prefix any documents contained within the packages.

3. If you want to package documents based on document properties, select **Grouping property** and select the property to group by in the drop-down list. For the selected property, documents are grouped into packages by each unique value of that attribute. For example, you selected **Form Name** for grouping and you have 20 documents that are being packaged. In the documents, 3 have the value of "Form-A", 5 are "Form-B", 10 are "Form-C", and 2 are "Form-X". Once packaged, you will end up with 4 packages, 1 for each unique form type. All "Form-A" documents will be in their own package, "Form-B" documents in their own package, etc.
4. In the **Ordering properties** list, select the document properties that will control the order the documents are packaged. As you select properties, they display in the **Selected order** list.



Only the allowed properties selected on the Configure Document Properties Utility will display in the **Ordering properties** list.

5. Select properties in the **Selected order** list and use the **Move up** and **Move down** buttons to configure the property order.
6. Use the following options to configure the closing conditions for the package. This will determine when the package is complete. You can configure one or more closing conditions.
 - **Closing document** – Select this option to close the package once the specified closing content is received. In the **Closing document action** box, choose if you want to remove the closing content, add it to the current page, or add it to the next page. In the **When** box, configure the conditions for specifying the content.
 - **Time elapsed since package creation** – Select this option to close the package when a specified amount of time has elapsed since the package was created (the first document was added to the package). Specify the time period using the options next to **Elapsed time**.
 - **Time elapsed since last match** – Select this option to close the package every period of time specified. Specify the time period using the options next to **Elapsed time**.
 - **Specific time of day has occurred** – Select this option to close the package at a specified time each day. Use the **Time of day** spin box to specify the time.
 - **Auto close (For "Run Now" or document right-click configuration)** – Select this option to close the package (or packages when grouping) when the last target document has been packaged by the action.



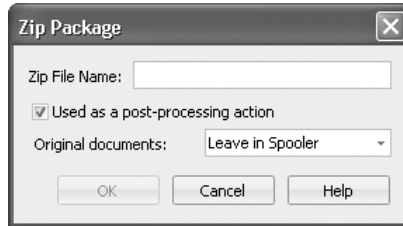
This option is used for running an ad hoc rule using the **Run Now** button on the **AdHoc Rules Manager** dialog box, or when right-clicking a document in the Documents grid and selecting a rule from the **Run Adhoc Rule** submenu.

7. Click **OK**.

To create a zip package

Use this action to zip the merged document or any other document in Barr EOM.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Zip Package**. The **Zip Package** dialog box displays.

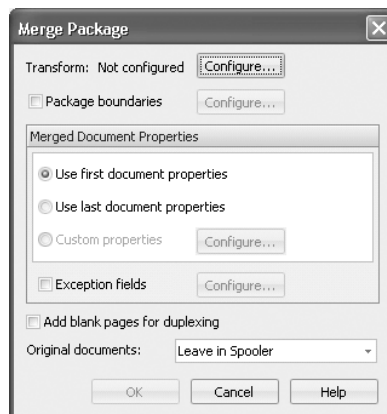


2. Enter the **Zip File Name** in the box.
3. If this rule will be used after all documents have been received into Barr EOM, select **Used as a post-processing action**.
4. Determine what will happen to the **Original documents** after the zipped file has been created. You can leave them in the spooler, move them to retain, or delete them.
5. Click **OK**.

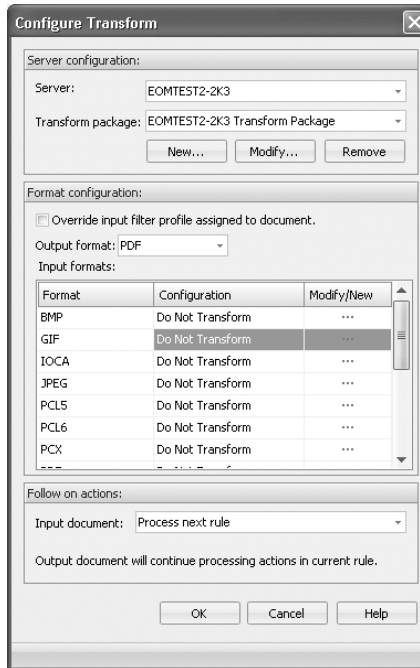
To create a merge package

Use this action to create a merged file. You can use this action after creating a package to merge all of the documents in to a single document.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Merge Package**. The **Merge Package** dialog box displays.



2. Next to **Transform**, click the **Configure** button to configure the transform. The **Configure Transform** dialog box displays.



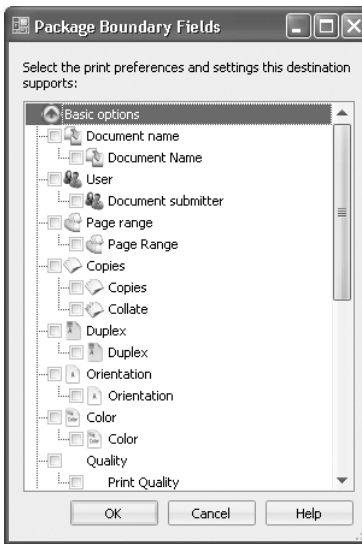
3. In the **Server** list, click the licensed transform server that you would like to use.
4. In the **Transform package** list, you can select an existing transform package or create one. Complete the following steps to create a transform package.
 - a. Click **New**. The **General** tab displays.
 - b. Enter the transform package **Name**.
 - c. Select a transform package **Type** of BarrEOM or DocBridge. DocBridge requires the purchase of a standalone version of the transform software and a separate license. DocBridge has more data types available.
 - d. If you select DocBridge, verify the **EXE path** is set to the correct folder. The default EXE path is @EOMTransformDir. To change the path, type in the box or click the ellipsis (...) button.
 - e. Set the **Logging State**. The logging state determines if transform logs and temp files will be saved in the document folder. By default, the **Logging State** is set to Yes. All log files should be inspected during installation and pre-production testing to insure that fonts are correctly mapped. In a production system, the logging can be disabled to save disk space. If the transform operation returns an error (return code not zero), the log and temp files will not be deleted, and are available for troubleshooting.

- f. On the **Filter Profiles** tab, specify how the transform software will handle the formatting for each data type.
 - To configure a profile, click the ellipsis button in the **Modify/New** column for the appropriate formats. From the **Configure Filter Profile** dialog box, configure the profile as needed. The profile contains a communications and printer definition section. See the *Configuring a CpMillProfile resource* help topic for instructions on configuring a filter profile.
 - To select a profile, click in the **Configuration** column for the appropriate formats and select the profile from the list.
 - g. On the **Resources** tab, specify where the transform software will find the resources needed for the transformation. For example, PDF fonts are usually found at the location of an Adobe installation.
 - h. On the **Fonts** tab, you can control the font mapping of input fonts to output fonts. The defaults are typically correct, but may need to be adjusted for special cases. You can add or modify fonts directly in the grid.
 - i. Click **OK** to create the transform package.
5. Use the **Override input filter profile assigned to document** checkbox option to determine if you want to override the input filter profile assigned to the document or if you want to use the filter profile configured in the transform package. Select the checkbox to use the filter profile in the transform package.
 6. In the **Output format** list, click the format of the output file.
 7. Configure the conversion of each input format in the **Input formats** grid, and then click **OK**.
 - For all unlicensed input formats and any input formats you don't want to use, click in the **Configuration** column and select **Do Not Transform**.
 - For licensed input formats, you can select **Use Default Options** or select a predefined configuration in the **Configuration** column. To configure a custom input format, click the ellipsis button in the **Modify/New** column. If **Use Default Options** or **Do Not Transform** is selected in the **Configuration** column, a new configuration will be created. If a predefined configuration is selected, that configuration will be modified. The custom transform options are configured on the **Input options** tab, **Output options** tab, and **Page Layout** tab. If BMP or PDF is selected as the output format, the **Bitmap output** tab or **PDF output** tab will also display.
 8. When the transform configuration is complete, click **OK**. The **Merge Package** dialog box indicates the transform has been configured.

9. Complete the following steps to configure **Package boundaries**.

Boundary fields are only applicable when a merged document will exceed the maximum number of exceptions (currently set at 1000). Merged documents that exceed the exception count will be split into separate documents. Boundary fields are used to control where the merged documents will be split. Each split will be on a boundary that maximizes the number of pages without exceeding the exception threshold. If you do not specify boundary fields, the split is arbitrary and will occur where the maximum number of pages can be fit.

- a. Select **Package boundaries** and click **Configure**. The **Package Boundary Fields** dialog box is displayed.



- b. From the grid, expand the sections to select the document properties that will be used as package boundaries.
- c. Click **OK**.
10. Under **Merged Document Properties**, determine if you want to use the document properties from the first page in the documents or the last page in the documents. Selecting custom properties is not yet available.
11. Complete the following steps to configure **Exception fields**. Exception fields specify which document properties to preserve on a per-page basis in the merged document. The document properties will be analyzed to determine the baseline and the exceptions (page overrides).
- a. Select **Exception fields** and click **Configure**. The **Exception Fields** dialog box is displayed.
- b. From the grid, expand the sections to select the document properties that will be used as exception fields.
- c. Click **OK**.
12. Determine if you need to Add blank pages for duplexing.

13. Determine what will happen to the **Original documents** after the merged file has been created. You can leave them in the spooler, move them to retain, or delete them.
14. Click **OK**.

3.13 Use EOM functions

Barr EOM functions are used to insert information into a document property. The `@parse`, `@dateTimeToString`, `@schedule`, and `@stringToDateTime` functions allow you to extract data from a document property and insert it into another document property.

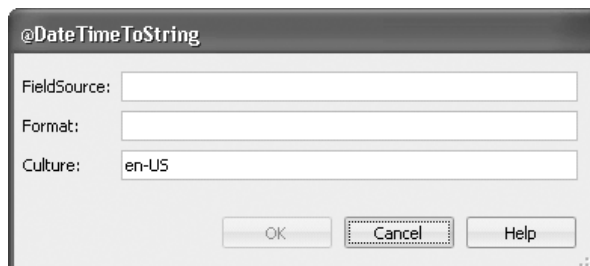
Review the following table for a description of each function. Procedures on how to use each function are listed below the table.

Function	Explanation
<code>@dateTimeToString</code>	Converts a date/time (usually from another document property) to a string
<code>@lookupCsv</code>	Looks up the value for a property in a .csv file
<code>@parse</code>	Extracts data from a document property
<code>@schedule</code>	Inserts a time into a document property
<code>@stringToDateTime</code>	Converts a string (usually from another document property) to a date/time value
<code>@Counter</code>	Specifies the name format for newly created burst documents

Configure the `@dateTimeToString` function

Use this procedure to configure the `@dateTimeToString` function. This function converts a date/time to a string in the format specified. This string will be inserted in the document property you are configuring.

1. Right-click in the appropriate document property and select Insert Function | `@dateTimeToString`. The **@DateTimeToString** dialog box displays.

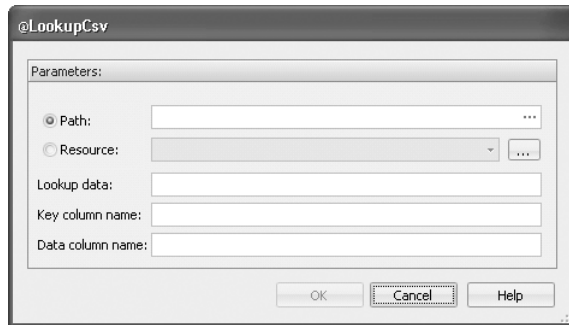


2. In the **FieldSource** box, specify the document property that contains the date/time string you want to insert. Right-click in the box, select **Insert Document Property**, and select the document property from the list.
3. In the **Format** box, enter the format the date/time string will use when it is inserted into the document property. For descriptions of the available formats, see the Format grids in the “@DateTimeToString dialog box” help topic.
4. In the **Culture** box, specify the culture name of the data in the document. The default is the current culture of the computer where the Barr EOM Console is running. When culture is not specified, the culture independent `CultureInfo.InvariantCulture` is used.
5. Click **OK**. The function is inserted into the document property using the following format: `@dateTimeToString([FieldSource], "Format", Culture)`

Configure the @lookupCsv function

Use this procedure to configure the @LookupCsv function. This function looks up the value for a property in a comma separated values file. The value will be inserted in the document property you are configuring.

1. Right-click in the appropriate document property and select Insert Function | **@lookupCsv**. The **@LookupCsv** dialog box displays.



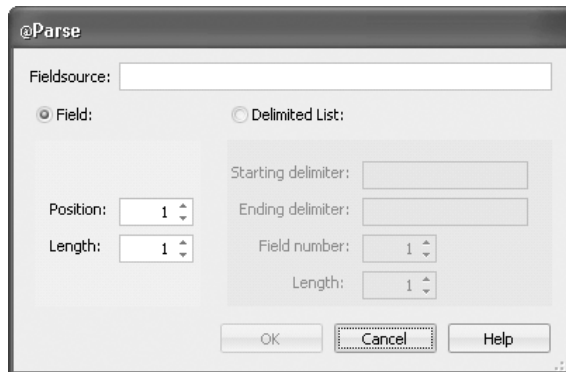
2. Select how you want to locate the .csv file. You can use one of the following options:
 - **Path** – Enter the path and file name of the .csv file, or click the Browse (...) button to navigate to the file.
 - **Resource** – Select the appropriate resource from the list, or click the Browse button to choose the resource from the **Manage CsvDocProp Resources** dialog box. If you are using a resource, "CsvDocProp:" will be inserted before the resource name.

3. In the **Lookup Data** box, specify the data you are looking up, this could be data from another document property or the results of an `@parse` function.
 - To select a document property, right-click in the box, select **Insert Document Property**, and then select the appropriate property from the list.
 - To use the results of an `@parse` function, right-click in the box and select **Insert Function | @parse()**. Configure the `@parse` function using the **@Parse** dialog box.
4. In the **Key column name** box, enter the column name in your .csv file where EOM should look for a value that matches the data you entered in the **Lookup data** box.
5. In the **Data column name** box, enter the column name in your .csv file that contains the value you want inserted into the document property.
6. Click **OK**. The function is inserted into the document property using the following format: `@lookupCsv("path/resource",lookup data,key column name,data column name)`

Configure the @parse function

Use this procedure to configure the `@parse` function. The parse function is used to extract data from a document property (e.g. Document Name). The parse function will extract data using character offset (specifying a beginning position and length), single delimiters (specify just the starting delimiter, it will be used as the only delimiter, field number, and length), and double delimiters (specifying a starting delimiter, ending delimiter, field number, and length). When you create a business rule action to set document properties, the parsing command should be entered in the appropriate **Value** cell on the **Set Document Properties** dialog box.

1. Right-click in the appropriate document property and select **Insert Function | @parse**. The **@parse** dialog box displays.



2. In the **FieldSource** box, specify the document property from which data will be extracted. Right-click in the box, select **Insert Document Property**, and select the document property from the list. The document property will appear in brackets in the field source box.
3. Determine if you want to extract data using character offset or double delimiters. Complete the steps in the appropriate section below.

To extract using character offset

- a. Select **Field**.
- b. In the **Position** box, specify the first position of the string to be extracted. The first character of source data is indicated by specifying a 1.
- c. In the **Length** box, specify the length of the string to be extracted. If the length specified is zero (0) or if the length is greater than the remaining data, then all data to the last character will be used.
- d. Click **OK**. The function is inserted into the document property using the following format: `@parse([FieldSource], position, length)`

Example: Data: PRINT100STD0C

Command	Result
<code>@parse(documentName,1,8)</code>	PRINT100
<code>@parse(documentName,9,4)</code>	STD0
<code>@parse(documentName,13,0)</code>	C

To extract using delimiters

- a. Select **Delimited List**.
- b. In the **Starting delimiter** box, specify the character that marks the beginning of the string. If a comma or backslash is used as the first character of the delimiter, then a backslash must precede the delimiter in the command. For example, a backslash delimiter will be shown in the command as `\\`.
- c. In the **Ending delimiter** box, specify the character that marks the end of the string. If a comma or backslash is used as the first character of the delimiter, then a backslash must precede the delimiter in the command. For example, a backslash delimiter will be shown in the command as `\\`. If there is only one delimiter, this field can be left blank.
- d. In the **Field number** box, specify the position of the field that will be extracted. (1 refers to the first field, 2 to the second, and so on.)
- e. In the **Length** box, specify the length of the string to be extracted. If the length specified is zero (0) or if the length is greater than the remaining data, then all data to the last character will be used.
- f. Click **OK**. The function is inserted into the document property using one of the following formats:

`@parse([FieldSource], "delimiter", field number, length)`

@parse([FieldSource], "starting delimiter", "ending delimiter", field number, length)

Example: Data: CJ,P038,FC=6,F=OCR1,ID=J0006600,ACCOUNT=DC

Command	Result
@parse(documentName, \,F=, \,, 1, 0)	OCR1
@parse(documentName, \,ACCOUNT=, \,, 1, 0)	DC
@parse(documentName, \,P, \,, 1, 10)	038

Configure the @schedule function

Use this procedure to configure the @schedule function. This function inserts the configured schedule into a string or date/time document property. Note, that you are not scheduling a document. You are just configuring a date/time using a schedule. The date/time string will be inserted in the document property you are configuring.

1. Right-click in the appropriate document property and select Insert Function | **@schedule**. The **Schedule** dialog box displays.
2. Set the appropriate **Day** option.
3. Set the appropriate **Time** option.
4. If you are inserting the schedule into a document property with a string type, you must also configure the following:
 - a. In the **String format** box, enter the format the date/time string will use when it is inserted into the document property. For descriptions of the available formats, see the Format grids in the “@DateTimeToString dialog box” help topic.
 - b. In the **Culture** box, specify the culture name of the data in the document. The default is the current culture of the computer where the Barr EOM Console is running. When culture is not specified, the culture independent CultureInfo.InvariantCulture is used.
5. Click **OK**. The function is inserted into the document property using one of the following formats:

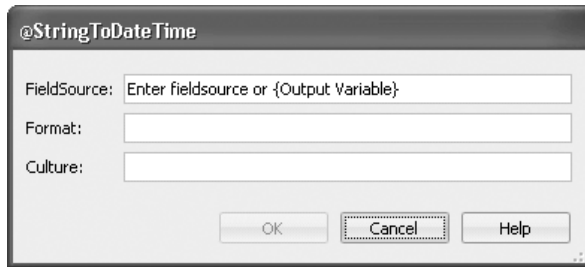
For date/time properties: @scheduleDateTime(daytype,dayvalue,timevalue,,)

For string properties: @scheduleString(daytype,dayvalue,timevalue,timevalue,format,culture)

Configure the @stringToDateTime function

Use this procedure to configure the @stringToDateTime function. This function converts a string to a date and time in the format specified. The string could be an extracted variable or another document property. This function inserts the configured date/time into a date/time document property.

1. Right-click in the appropriate document property and select Insert Function | @stringToDateTime. The @StringToDateTime dialog box displays.



2. In the **FieldSource** box, specify how you want to retrieve the date/time that will be inserted in the document property. You can do this using one of the following methods:
 - **FieldSource** – Right-click in the box, select **Insert Document Property**, and select the document property from the list.
 - **Output Variable** – Right-click in the box, select **Insert Variables**, and select the output variable from the list. You can also enter the output variable directly in the box. The variable must be surrounded with curly braces {}. The output variables are from an Advanced Document Modification rule or an extraction variable from an extract rule (line mode or page mode) or burst rule (line mode or page mode).
3. In the **Format** box, enter the format the date/time string will use when it is inserted into the document property. For descriptions of the available formats, see the Format grids in the “@DateTimeToString dialog box” help topic.
4. In the **Culture** box, specify the culture name of the data in the document. The default is the current culture of the computer where the Barr EOM Console is running. When culture is not specified, the culture independent CultureInfo.InvariantCulture is used.
5. Click **OK**. The function is inserted into the document property using one of the following formats:

@stringToDateTime(FieldSource,Format)

@stringToDateTime(FieldSource,Format,Culture)

@stringToDateTime({OutputVariable},Format)

@stringToDateTime({OutputVariable},Format,Culture)

Configure the @counter function

Use this procedure to configure the @counter function. This function is only used if you are configuring a business rule to burst using page mode, and you can only enter the function in the Document Name property. This function allows you to specify the name format for the newly created burst documents.

1. Right-click in the Document Name property and select Insert Function | **@counter**. The **@Counter** dialog box displays.
2. Specify the **Counter length**.
3. Specify the **Separator** you want to use.
4. Click OK. The function is inserted into the Document Name property using the following format: `@Counter(counter length,separator)`

Example: If you burst MyDoc into 3 new documents and you specified `@Counter(3,#)` in the Document Name property, the documents would be named as follows:

MyDoc#001

MyDoc#002

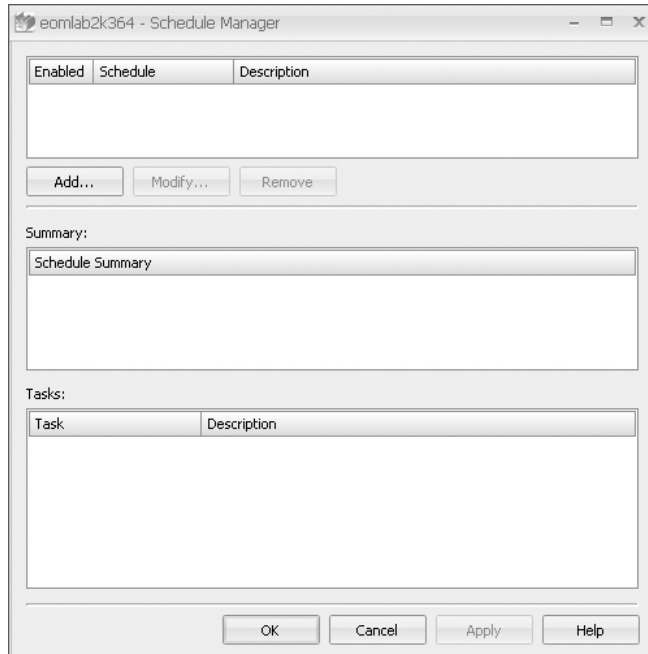
MyDoc#003

3.14 Schedule tasks

Administrators can configure a recurring schedule for a task. Tasks can be created to run an ad hoc rule, create and save a report, or create and email a report.

Complete the following steps to create a schedule.

1. From the EOM Console menu bar select Tools | **Schedule Manager**. The **Schedule Manager** dialog box displays.



2. Click **Add** to create a schedule. The **New Schedule** dialog box is displayed.
3. Enter a schedule **Name** and **Description**.
4. Use the **Enabled** check box to determine if the schedule will be enabled or disabled.

- From the **Schedule** tab, click **Add**. A new schedule is added in the **Summary** box.

- Under **Recurrence pattern**, choose if you want to create a **Simple**, **Daily**, or **Monthly** recurrence pattern. Notice the recurrence options changed based on the type of pattern you want to create. Configure the options as necessary.
- Under **Range of recurrence**, determine the **Start** and **End** date/time for the schedule. By default the schedule is configured with no end date. To configure an end date, select the **End by** check box and select the appropriate date and time in list boxes.
- When the schedule is complete, click **Save Edit** to save the schedule.

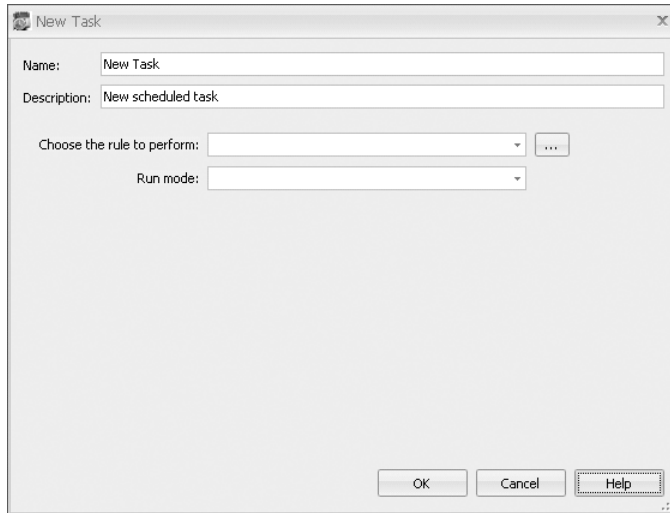


To add multiple schedules, click **Add** and configure the schedules as necessary.

- From the **Tasks** tab, you can create multiple tasks for the schedule. Use the following procedures to configure tasks as necessary.

To run an ad hoc rule:

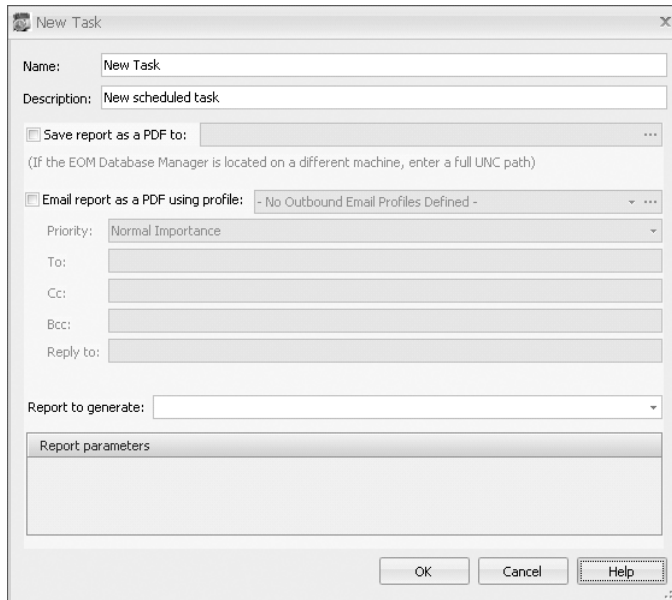
- a. Click **Add | Perform Rule**. The **New Task** dialog box is displayed.



- b. Enter a **Name** and **Description** for the task.
- c. In the **Choose the rule to perform** list, select an existing ad hoc rule. To create a rule, click the Browse button and create a rule from the **AdHoc Rules Manager** dialog box. See section 3.12, “Work with ad hoc rules” for instructions on creating rules.
- d. Once the task is selected, click **OK**. The new task is listed in the grid on the **Tasks** tab.

To create and save/email a report:

- a. Click Add | **Create Report**. The **New Task** dialog box is displayed.



- b. Enter a **Name** and **Description** for the task.
 - c. To save the report, select **Save report as a PDF to**. In the box, either type the folder path where the report will be saved, or click the Browse button to select the folder. If the EOM Database Manager is on a different machine, you must enter the full UNC path.
 - d. To email the report, select **Email report as a PDF using profile**. Either select an email profile from the list, or click the Browse button to create one from the **Manage Outbound Email Profiles** dialog box.
 - e. Configure the email messages that will be sent using the following options:
 - Set the **Priority** level of the email as normal, low, or high.
 - Enter the email addresses that will be sent messages in the **To**, **CC**, and **Bcc** boxes. You can enter multiple email addresses separated by a comma.
 - In the **Reply to** box, enter an email address where replies will be routed. You can enter multiple email addresses separated by a comma.
 - f. In the **Report to generate** list, select the report you want to create.
 - g. Under **Report parameters**, configure the parameters for the selected report. The parameters will change depending on the report selected.
 - h. Once the task is selected, click **OK**. The new task is listed in the grid on the **Tasks** tab.
10. Use the buttons below the task grid to add additional tasks to the schedule, modify existing tasks, or remove tasks from the schedule.

11. When your schedule is complete, click **OK**. The schedule summary and tasks are listed on the **Schedule Manager** dialog box. Use the check box in the **Enabled** column to determine if the schedule is enabled or disabled.
12. Click **OK**.

3.15 Use the Message Console

The Message Console gathers information about program activity. The console is used as a journaling tool to record and display activity that occurs during normal program operation. It also generates comprehensive information that can be used by developers and support staff at Barr Systems to troubleshoot program operation if necessary. Once the program begins, data is automatically traced according to defined priorities and servers and modules selected.

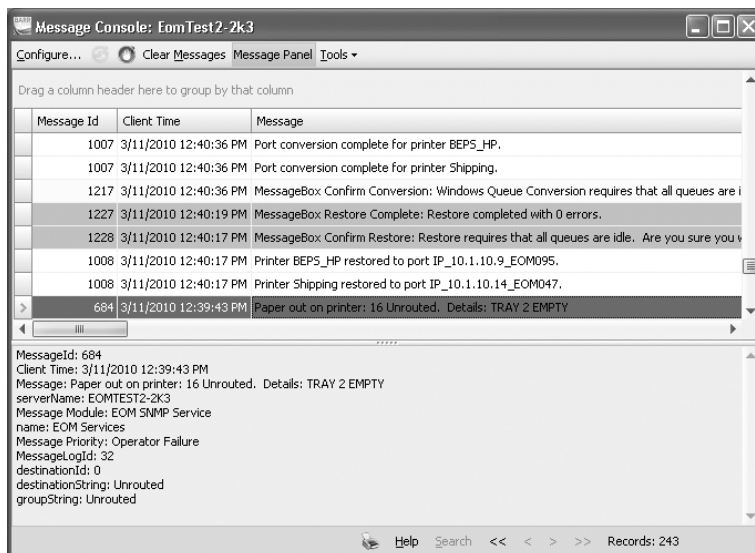
Capture trace data

To trace activity, select the modules and set the priority level for each module. Records with a priority level less than or equal to the set priority level will be displayed in the Message Console.



Performance tuning: Setting the priority level higher than **Operator Information** can cause performance degradation. Because the Message Console continues to process information after you close the utility, you must check the priority level setting before you close. If you experience any problems, we recommend changing the priority level setting to **Operator Information**.

1. From the EOM Console, select Tools | **Message Console** to open the Message Console utility.



2. On the toolbar, click **Configure**. The **Adjust Message Priority** dialog box is displayed.
3. Set the priority level for the appropriate modules. The console will display records that have a priority level less than or equal to the selected priority level. There are several ways to set the module's priority level.
 - To set a module's priority, click the **Priority** cell for the appropriate server/module row and select the priority level from the drop-down list. Note that the **Server** column lists all servers with Barr EOM services installed. For each server, the **Message Module** column lists each module. Use the server/module row to specify a priority for each module on a specific server.
 - To set all modules on a server to the same priority level, in the **Message Module** column, locate the **All Modules on this Server** cell for the appropriate server. In that row, click the **Priority** cell and select the priority level from the drop-down list. All messages for the selected server will be set to the specified priority level. All of the other rows will remain unchanged in the grid, but the Message Console messages will be set at the priority specified in the **All Modules on this Server** row.
4. Click **OK** to close and save changes.

View messages for a destination, source, or document

From the Destinations, Sources, or Documents grid, right-click the item you want to view messages for and select **View messages**. The console will display all messages related to the selected item.

Show/hide the message panel

To show/hide the message panel in the Message Console, click the **Message Panel** toolbar button or double-click a message in the grid. The message panel will display below the message grid. The details of the selected message will display in the panel.

Clear the messages in the console

To clear the messages currently displaying in the Message Console, click the **Clear Messages** toolbar button.

Copy messages to Microsoft Excel

1. From the Message Console utility, select the rows you want to copy.
2. Right-click in the selected rows and select **Copy**.
3. Open Microsoft Excel and paste the messages. The contents of the entire row will be pasted.

Export/Import messages

From the Message Console you can export specific messages and the message log file. You can also import message log files that were previously exported.

To export specific messages

1. From the Message Console utility, select the rows you want to export.
2. Right-click in the selected rows and select **Export**. The **Preview** window is displayed.
3. Export the files as needed from the **Preview** window.

To export a message log file

1. On the Message Console toolbar, select Tools | **Export**.
2. Select the location where you want the log file to be saved and click **Export**.
3. Click **OK**.

To import a message log file

1. On the Message Console toolbar, select Tools | **Import**.
2. In the **Open** dialog, select the log file you want to import.
3. Click **OK**. The selected log file displays in the Message Console.

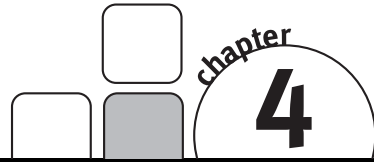
Pause and resume automatic refresh

The Message Console automatically refreshes so that newly received messages are displayed. You can use the toolbar buttons to pause and resume the automatic refresh feature:

- To pause automatic refresh, click the **Pause** button on the toolbar.
- To resume automatic refresh, click the **Resume** button on the toolbar.

Notes:

Configure Administrative Options



This chapter provides Administrators with an overview of the Barr EOM Administration application and instructions for configuring administrative options. Review the following list of administrative procedures.

- Manage EOM security roles (section 3.3)
- Configure EOM Console security (section 3.3)
- Detect printers (section 3.3)
- Configure SNMP monitoring (section 3.3)
- Configure columns (section 4.2)
- Configure global document properties (section 4.3)
- Manage billing accounts (section 4.4)
- Manage the Barr EOM license (section 4.5)
- Manage product components (section 4.6)
- Manage SNMP devices (section 4.7)
- Manage users (section 4.8)
- Convert/restore Windows queues (section 4.9)
- Manage Windows queues (section 4.10)
- Set general preferences (section 4.11)
- Define Viewer utilities (section 4.12)
- Backup and restore Barr EOM (section 4.13)
- Manage resources (section 4.14)

4.1 Learn about the Administration application

The Administration application is used to configure administrative options in Barr EOM. In the navigation pane, click the **Administration** button to open the Administration application. The navigation pane displays a list of links used to configure the administrative options. When you click the links, the console window displays the associated configuration options.

Navigation Pane Option	Explanation
Configure Columns	Sets the default display columns for the Destinations, Sources, and Documents grids. You can also determine whether the columns will be visible and editable when you are working with alert and business rules.
Configure Document Properties	Configures the print preferences/document properties that are supported throughout Barr EOM.
Manage Billing Accounts	Configures Barr EOM billing accounts. Billing lists are created that contains specific accounts. These lists are assigned through Windows queue quotas and user quotas.
Manage License	Installs and manages the licenses for the Barr EOM software.
Manage Product Components	Manages the Barr EOM components that have been installed and are connected to the active EOM server.
Manage SNMP	Configures SNMP services and allows for updating SNMP values for detected SNMP devices. Detected devices can also be configured as Barr EOM destinations.
Manage Users	Configures user profiles to be used in Barr EOM. The users and groups added here will be available when you are setting permissions. The profiles establish the printing quote per user or group so that you can restrict printing and perform cost accounting.
Manage Windows Queues	Manage the Windows queues by configuring and assigning a Quota Management Profile to the queue. The Quota Management Profile contains restrictions to disable printing, determines whether the queue will show the client pop-up window, and contains any advanced rules that are configured using the Rules Editor.
Set General Preferences	Configures general administrative options such as setting the document file-store path and the document retention period.

4.2 Configure columns

From the Administration application, administrators can configure the columns that will be displayed by default in the Destination, Source, Document, and Library grids. Users can add, remove, and reorder columns as necessary from the grids.

Follow these steps to configure columns.

1. From the navigation pane, select the **Administration** application.
2. In the navigation pane, click one of the following:
 - To configure the Destinations, Sources, and Library grids, click **Configure Columns**. In the console window, the Configure Columns Utility displays tab pages representing each grid.
 - To configure the Documents grid, click **Configure Document Properties**. The Configure Document Properties Utility displays in the console window.
3. Use the following procedures from the grid you want to configure.
 - Use the **Visible in Grid** and **Editable in Grid** columns to specify if the column will display in the grid and if it will be editable. Cells with a shaded background cannot be edited.
 - Use the **Visible in Rules** and **Editable in Rules** columns to specify if the column will be available and editable from the Business Rules Manager. The Alert Rules Manager also applies for the Destinations grid. Cells with a shaded background cannot be edited.
 - To reorder columns,
 - From the Configure Columns Utility tab pages, select a row and click **Move Up** or **Move Down**.
 - From the Configure Document Properties Utility, click **Set view order**. From the View Order dialog box, select a property and click **Move up** or **Move down** as necessary. When finished, click **OK**.
 - You can perform the following procedures from the Configure Columns Utility for the Destinations, Sources, and Library grids.
 - To add columns, click **Add** and select columns from the **Add Column** dialog box. Make sure that you select the appropriate check boxes for the new column.
 - To remove columns, select a row and click **Remove**.
 - To change the display name, click the appropriate cell in the **Display Name** column and enter the new name. Cells with a shaded background cannot be edited.
4. Click **Apply** to apply and save column changes. If necessary, select another application tab and make the appropriate changes.

4.3 Configure global document properties

From the Configure Document Properties Utility, you can determine which print preferences/document properties are supported throughout Barr EOM. You can also select the settings that are allowed for a particular property. These settings determine what is available to the user in the dialogs where properties are configured. When properties are disabled, those Document columns are also hidden in the Documents grids.

Complete the following steps to configure global document properties.

1. From the **Administration** application, click Configure Document Properties Utility. All of the document properties available in Barr EOM are listed and grouped into the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category and view the associated properties, click the down arrow next to a category name. To collapse a category, click the up arrow.
2. Determine the properties you want to be available for configuration throughout Barr EOM. Select the **Allowed** check boxes for properties you want to be available for configuration throughout Barr EOM. Clear the check boxes for properties you do not want to be available.

Properties that are configured by selecting from a list of options will display a drop-down arrow in the property cell. Click the cell containing the arrow to display a dialog listing the available options. You can select and clear the check boxes to determine the choices that will be available when those properties are configured.



Here is an example of how to configure the Resolution property so users can only select a Resolution of 75, 100, or 150. First, expand the **Basic options** category by clicking the down arrow next to the category name. Next, select the check box next to the **Resolution** property. This will make the property available for configuration throughout Barr EOM. Finally, under the Resolution property select the check boxes next to the options you want to be available for selection. In this example, you would select the check boxes next to 75, 100, and 150. Clear the check boxes next to the remaining Resolution options.

Repeat this step until all properties are configured.

3. When all of the properties are configured, click **Apply**.

4.4 Manage billing accounts

Documentation coming soon

4.5 Manage the Barr EOM license

The **Manage License Utility** is the only way to install, activate, and manage licenses for the Barr EOM software. After Barr EOM is installed, you must install and activate the license. Later, the license details such as license file location or the updating of license information can be managed. The Manage License utility can be used by any EOM Console user that has been given permission on the **Security Configuration** dialog box. EOM administrators have permission by default.

Install the license

You will typically install the Barr EOM license during the software installation procedure.

Complete the following steps to install a Barr EOM license.

1. From the EOM Console navigation pane, select the **Administration** application.
2. In the navigation pane, click **Manage License**. The **Manage License Utility** is displayed in the right panel.

Administration - Manage License

License key: License Wizard Customer: BARR SYSTEMS INC
Gainesville
FL

Serial number: 851625

License Status: Activated, version (3.0.85.0)

Drag a column header here to group by that column

Description	Quantity	Expires	Licensed Behavior	Unlicensed Behavior
Barr EOM	1	12/31/9999 11:59:59 PM	Enabled	Hidden
Network Folders (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
LPD (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
IP Socket (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
FTP (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
RJE (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
NJE (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
MQ Series (Input)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
Email (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
Windows Queues (Outp...	1	12/31/9999 11:59:59 PM	Enabled	Hidden
Network Folder (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
LPR (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
IP Socket (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
FTP (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
RJE (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden
NJE (Output)	1	12/31/9999 11:59:59 PM	Enabled	Hidden

Refresh Cancel Apply Help

3. Click **License Wizard**. The **License wizard** is displayed.
4. On the **License Operation** dialog box, select **Install and activate a new license**. Click **Next**.

5. On the **License File Installation** dialog box, determine if you want to install the license automatically using an Internet connection or manually by selecting the license file.

- To install the license automatically, select the radio button next to **Install License Automatically**. An internet connection is required to install automatically. Enter the **License key** for this Barr EOM system and click **Next**.



During Barr EOM order processing an EOM license was created that matches the options ordered. The license key was sent in an email to the ordering customer. If you cannot locate your license key, contact Barr Systems Technical Support or Sales for assistance.

- To install the license manually, select the radio button next to **Install License Manually**. In the **License file** box, type the path and file name of your license file or click the Browse button to locate the file and select it. Click **Next**.
6. On the **License Confirmation** dialog box, confirm the license information is correct and click **Next**.



The **Next** button will not activate if the **Serial** and **Order** numbers do not match. The order number is the same number as the Barr invoice number.

7. On the **Activate License** dialog box, determine if you want to activate the software at this time.
 - To activate the software, go to the next section, “Activate the license,” to complete the wizard.
 - To complete the installation without activating the license, select **Skip activation at this time**, click **Next**, and click **Finish**. You can activate the license at a later time using the **License wizard**.

Activate the license

Use one of the following procedures to activate a license file. You can activate all EOM DBM components via the Internet or perform a custom activation by selecting the individual EOM DBM components you want to activate.

To activate all DBM components via the Internet

This will automatically activate all EOM DBM components. An internet connection is required to use this method. To use this method, perform the following steps.

1. On the **Activate License** dialog box, select **Activate all DBM components via the Internet** and click **Next**. A confirmation will display saying the activation is complete.
2. Click **Next** and then click **Finish**.

To perform custom DBM activation via the Internet

This method allows you to choose the EOM components you want to activate and activate via the Internet. To use this method, perform the following steps.

1. On the **Activate License** dialog box, select **Custom DBM activation** and click **Next**.
2. On the **Custom DBM Activation** dialog box, select the DBM components you want to activate.
3. Select the **Use Internet connection** check box.
4. Click **Next**. The activation confirmation will display.
5. Click **Next** and then click **Finish**.
6. In the **Manage License Utility**, verify the **License Status** shows the license is activated with the proper version number. If some EOM DBM components are activated and some are not the license status will show **Partial Activation**.

To perform custom DBM activation manually

This method allows you to choose the EOM components you want to activate and activate the license manually. You will use this method if you do not have an Internet connection. To use this method, perform the following steps.

1. On the **Activate License** dialog box, select **Custom DBM activation** and click **Next**.
2. On the **Custom DBM Activation** dialog box, select the components you want to activate. Do not select the **Use Internet connection** check box.
3. On a computer that is connected to the Internet, open Internet Explorer and browse to www.barrcentral.com.
4. Click **Activation** in the left column.
5. In the **Product type** list, select **EOM**.
6. In the **Serial** box, enter the license serial number.
7. In the **Version** box, enter the Barr EOM software version number.
8. In the **HW Code** box, enter the value from the **Hardware Code** column on the **Custom DBM Activation** dialog box.
9. Click **Get Code**.
10. Copy the activation code and paste into the **Activation Code** column on the **Custom DBM Activation** dialog box. This will need to be pasted into the row that corresponds to the **Hardware Code** used in step 8.
11. Click **Next**. A selection confirmation will display saying which EOM DBM components were selected and the activation method.
12. Click **Next**. The activation confirmation will display.
13. Click **Next** and then click **Finish**.
14. In the **Manage License Utility**, verify the **License Status** shows the license is activated with the proper version number. If some EOM DBM components are activated and some are not the license status will show **Partial Activation**.

Deactivate DBM components/Uninstall the license

Use the following procedure to deactivate Barr EOM DBM components. If you deactivate all EOM DBM components, the license will be uninstalled and all EOM processing will stop.

1. From the EOM Console navigation pane, select the **Administration** application.
2. In the navigation pane, click **Manage License**. The **Manage License Utility** is displayed in the right panel.
3. Click **License Wizard**. The **License wizard** is displayed.
4. On the **License Operation** dialog box, select **Deactivate DBM components/uninstall license**. Click **Next**.
5. On the **Deactivate DBM Components** dialog box, select the components you want to deactivate. Deactivating all components will uninstall the license.
6. To deactivate using the Internet, select the **Via the Internet** check box.



If you do not deactivate via the Internet, the activation database at Barr Systems will not be updated. Please contact Barr Systems Technical Support directly to keep the license in the correct activation status.

7. Click **Next**. A warning message will appear asking if you are sure you want to uninstall the license and stop any active EOM operations. Verify all EOM operations have finished and click **Yes**.
8. A confirmation will display saying the deactivation is complete. Click **Next** and then click **Finish**.

Select the license file location

You select a location for the license file; it is not automatically stored at a certain location. Because the license file is so important, choose a location that is memorable and secure. For example, rather than storing the file in the temp folder, you might store it in the \\Barr Systems\EOM folder.



License files cannot be modified. The license file contains a digital signature, and if the file is edited the file will no longer match the digital signature. This is true even if a space is entered and then deleted. The license file can be opened in Internet Explorer or in Notepad without destroying the license functionality, as long as Notepad is closed without saving. If you edit the license file, it will not install. If you edit a license file that is already installed and activated, Barr EOM will no longer function.

Refresh the license information

In some organizations, more than one person might have the **Manage License Utility** displayed at a time. When an administrator installs a new license, the new license data is displayed on that administrator's screen. If other users have the **Manage License Utility** opened, the new information will be displayed within a minute. If other users want to check the license status immediately click **Refresh** or close and reopen the utility. We recommend administrators notify the other users to refresh the dialog box so they can view the new license data.

4.6 Manage product components

From the Manage Product Components Utility you can view the current status of each Barr component. You can also authorize servers and configure services to be monitored from the EOM Console.

1. From the EOM Console navigation pane, select the **Administration** application.
2. Click the **Manage Product Components** link. The **Manage Product Components** utility displays in the console window.
3. Review all of the installed Barr EOM components and their status. You can also authorize servers and configure services to be monitored from the EOM Console. See below:
 - **Authorize servers:** If a server is not authorized all components for that server will appear in red text. To authorize the server, select a check box in the **Authorized** column. This will authorize the server and automatically select the check boxes for all other components using that server. Click **Apply**.
 - **Enable/disable monitoring:** To enable/disable service monitoring from the EOM Console, select and clear the appropriate check boxes in the **Monitored** column. Click **Apply**. The service status lights display to the right of the menu bar. Move the pointer over the lights to identify the service and status.

4.7 Manage SNMP devices

You can use the Manage SNMP Utility to configure each Barr EOM SNMP Service. You can determine how frequently the Barr EOM SNMP Service will update EOM destinations that are auto-detected SNMP printers. The SNMP update has two types of values, dynamic and static, each with their own frequency setting. Dynamic values are values that can change while the printer is being used, such as out of paper and low on toner. Static values are values that do not change or change very infrequently, such as the printers name and IP address. In most cases, you should configure the dynamic values to update more frequently than the static values. Dynamic value updates are needed to maintain timely alerts so the printer can stay operational.

Configure SNMP monitoring

Complete the following steps to configure SNMP monitoring for Barr EOM.

1. From the EOM Console navigation pane, select the **Administration** application.
2. In the navigation pane, click **Manage SNMP**. The **Manage SNMP Utility** displays in the right panel.

The screenshot displays the 'Administration' window with the 'Manage SNMP' utility. It is divided into two main sections: 'SNMP services' and 'Autodetected devices'.

SNMP services:

Buttons: Select all, Unselect all

	Server Id	Server Name	IP ...	Running	Last Dynamic Update	Last Static Update
☒	1	EOMTEST2-2K3	10.1....	☒	Never Run	Never Run

Buttons: Configure, Detect now, Update now, Help

Autodetected devices:

Buttons: Select all, Unselect all

	SNMP Device Name	Windows Pri...	Print Protocol	MAC...	IP...	Port	Queue ...	Location
☒	Aficio MP C2500			00:00:...	10.1...			
☒	Aficio CL7200			00:00:...	10.1...			
☒	IBMED3C54B			00:04:...	10.1...			

Buttons: Unused devices, EOM devices, Ignored devices, All devices, Merged devices

Buttons: Update, Promote to EOM, Ignore, Delete, Help

3. In the **SNMP services** grid, select the check box for the server you want to update.

4. Click **Configure**. The **SNMP Server Configuration** dialog box displays.

SNMP Server Configuration: EOMTEST2-2K3

SNMP detection method

☒ Use SNMP Detection

Default SNMP version: Auto

Auto-detection frequency: 00:00:00

☒ Broadcast

☐ IP Ranges(s):

Default Community name: public

SNMP metering

☐ Update metering values

SNMP metering frequency: 01.00:00:00

SNMP metering timeout: 3600

Dynamic update

☐ Update dynamic values

Dynamic update frequency: 00:05:00

Dynamic update timeout: 0

Static update

☐ Update static values

Static update frequency: 07.00:00:00

Dynamic update timeout: 0

OK Cancel Apply Help

5. Complete the following steps to enable SNMP detection.
 - a. Select **Use SNMP Detection**.
 - b. Select the **Default SNMP version**, Auto, SNMPv1, or SNMPv2c
 - c. Specify the **Auto-detection frequency**, to determine how often you want auto detection to run. The frequency format is hh:mm:ss (hours:minutes:seconds). By default auto detection is disabled, so the frequency is set to 00:00:00. If you want to change the frequency to 1 hour, edit the cell to show 01:00:00.
 - d. Choose the detection method, either **Broadcast** or **IP Ranges**. If you select IP ranges, you will enter the **Start** IP address and the **End** IP address and click **Add**. You can enter additional IP ranges as needed. Click **OK** when finished.
6. Enter the **Default community name**.
7. Complete the following steps to perform automatic SNMP metering.
 - a. Select **Update metering values**.
 - b. Enter the **SNMP metering frequency**. The frequency format is dd.hh:mm:ss (days.hours:minutes:seconds). By default the metering frequency is set to one day, 01.00:00:00.
 - c. Enter the **SNMP metering timeout** period in seconds. By default, the timeout is set to 3600.

8. Complete the following steps to automatically update dynamic values.
 - a. Select **Update dynamic values**.
 - b. Enter the **Dynamic update frequency**. The frequency format is hh:mm:ss (hours:minutes:seconds). By default the dynamic update frequency is set to five minutes, 00:05:00.
 - c. Enter the **Dynamic update timeout** period in seconds. By default, the timeout is set to 0, meaning there is no timeout period.
9. Complete the following steps to automatically update static values.
 - a. Select **Update static values**.
 - b. Enter the **Static update frequency**. The frequency format is dd.hh:mm:ss (days.hours:minutes:seconds). By default, the timeout is set to seven days, 07.00:00:00.
 - c. Enter the **Static update timeout** period in seconds. By default, the timeout is set to 0, meaning there is no timeout period.
10. Click **OK**.

Configure SNMP devices

These steps will be performed from the **Autodetected devices** grid. The grid lists all of the SNMP devices that have been detected. Notice there are five tabs below the grid, **Unused devices**, **EOM devices**, **Ignored devices**, **All devices**, and **Merged devices**.

To perform an SNMP update immediately for detected SNMP devices

You can perform an update from any of the tab pages.

1. Select the check boxes for SNMP devices you want to update.
2. Click **Update**.

To delete SNMP devices

1. You can perform an update from any of the tab pages.
2. Select the check boxes for the devices you want to delete. .
3. Click **Delete**.

To add detected devices as Barr EOM destinations

1. From the **Unused devices** tab, select the check boxes for each device you want to be added as a Barr EOM Socket destination.
2. Click **Promote to EOM**. Those devices are moved to the **EOM devices** tab. A dialog displays asking if you would like to create a destination for the selected device. Click **Yes**.
3. From the **Add Destination** dialog box, select the destination **Type**. You can choose fiery device, IPP, LPR, or socket.
4. Select the EOM **Server**.

5. Select the group where you would like the destination created.
6. Click **OK**.

To ignore SNMP devices

1. From the **Unused devices** tab, select the check boxes for each device you want to ignore.
2. Click **Ignore**. Those devices are moved to the **Ignored devices** tab.

To restore ignored SNMP devices

1. From the **Ignored devices** tab, select the check boxes for each device you want to restore.
2. Click **Restore**. Those devices are moved to the **Unused devices** tab.

To merge EOM devices

1. From the **EOM devices** tab, select the check boxes for the devices you want to merge.
2. In the **Merge Devices** dialog box, select the main device. This device will remain listed on the **EOM devices** tab.
3. Click **OK**. The devices are listed on the **Merged devices** tab.

To unmerge EOM devices

1. From the **Merged devices** tab, select the check boxes for the devices you want to unmerge.
2. Click **Unmerge**. The devices are listed on the **EOM devices** tab.

To demote EOM devices

1. From the **EOM devices** tab, select the check boxes for the devices you want to demote.
2. Click **Demote**. The devices are listed on the **Unused devices** tab.

4.8 Manage users

Use the **Manage Users** utility to add, configure, and modify individual users, groups, and departments. You access the user, group, and department tasks from individual tabs. You can configure such settings as email addresses, printing restrictions, and account balances.

A company with an established hierarchy of Windows users might use this utility in the following way: add all its users and groups; set group balance settings, for example, allotting everyone in sales a certain print allowance; and then, from the **Users** tab, specify exceptions to the group settings, for example, specifying that managers have an unlimited print allowance.

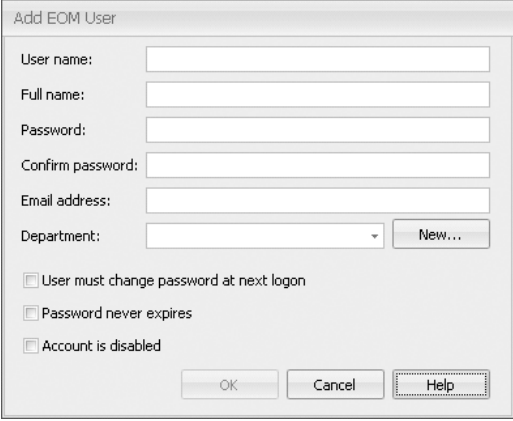
Add users and groups to Barr EOM

You can add users and groups to Barr EOM from the **Users** tab and **Groups** tab in the **Manage Users** utility and the **User and Group Selection** dialog box. The **Manage Users** utility is an Administration application for adding and removing users and groups and configuring quota management settings. You can access the **Users and Group Selection** dialog box when configuring security roles, assigning permissions for the EOM Console, Destinations, Sources, and Documents, and configuring notification profiles during source configuration and business rule creation.

To add an EOM user

Follow these steps to add an EOM user.

1. From the **Users** tab or the **User and Group Selection** dialog box, click **More Users** and then click **Add EOM User**. The **EOM User** dialog box is displayed.



The screenshot shows a dialog box titled "Add EOM User". It contains the following fields and options:

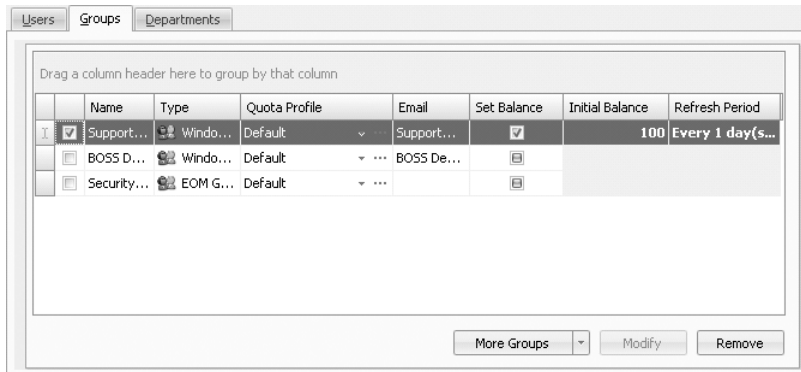
- User name: [Text input field]
- Full name: [Text input field]
- Password: [Text input field]
- Confirm password: [Text input field]
- Email address: [Text input field]
- Department: [Dropdown menu] [New... button]
- ☐ User must change password at next logon
- ☐ Password never expires
- ☐ Account is disabled
- [OK] [Cancel] [Help] buttons

2. Complete the **User name** and **Full name** boxes.
3. In the **Password** and **Confirm password** boxes, enter the user password that will be used when logging in to the server.
4. In the **Email address** box, specify an email address for the user.
5. If this user is a member of a department, either click the **Department** box and select one of the existing departments or click **New** to create a department from the **Department** dialog box.
6. Configure the account using the following options:
 - **User must change password at next logon** – When selected the user will be prompted to enter a new password.
 - **Password never expires** – When selected, the password will never expire.
 - **Account is disabled** – When selected the account is disabled.
7. Click **OK**.

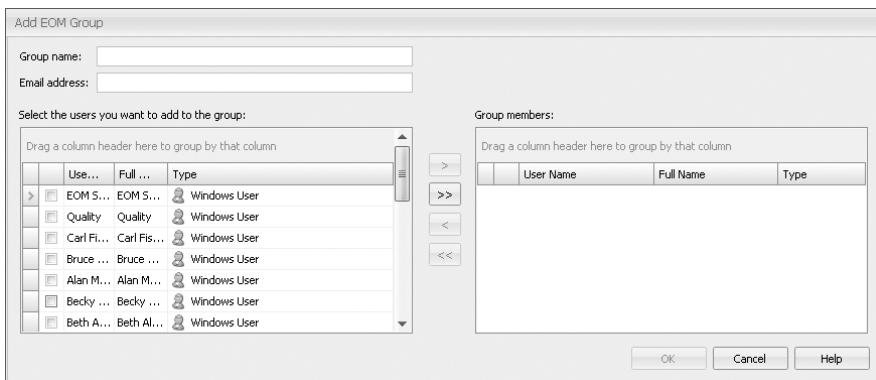
To add an EOM group

Follow these steps to add an EOM group. EOM groups can include EOM, LDAP, and Windows users.

1. From the EOM console navigation pane, select the **Administration** application.
2. In the navigation pane, click **Manage Users**. The **Manage Users** utility is displayed in the right panel.
3. Click the **Groups** tab.



4. Click **More Groups** and then click **Add EOM Group**. The **EOM Group** dialog box is displayed.



5. In the **Group name** and **Email address** boxes, enter a name and an email address for the group.

6. The **Select users** grid displays all of the Barr EOM users. Add users to the group by selecting the check box column for those users and clicking the right arrow (>) button. The members of the group will be displayed in the **Group members** grid. You can move all users by clicking the double right arrow (>>) button.

If you want to remove a user from the group, select the check box column for that user and click the left arrow (<) button. The selected user will be moved back into the **Select users** grid. You can remove all users by clicking the double left arrow (<<) button.

7. When your group is completed, click **OK**.

To add an LDAP user or group

Follow these steps to add an LDAP user or group. LDAP groups can only include LDAP users.

1. Depending on if you want to add an LDAP user or group, complete one of the following procedures:
 - To add an LDAP user, from the **Users** tab or the **User and Group Selection** dialog box, click **More Users** and then click **Add LDAP User**. The **LDAP User** dialog box is displayed.

Add LDAP User

LDAP server: [dropdown] [New...] [Modify...]

LDAP user DN: [text box] [Browse...]

LDAP User Detail

User name: [text box]

Display name: [text box]

Email address: [text box]

Department: [dropdown] [New...]

☐ Override LDAP data

[OK] [Cancel] [Help]

- To add an LDAP group, from the **Groups** tab, click **More Groups** and then click **Add LDAP Group**. The **LDAP Group** dialog box is displayed.

Add LDAP Group

LDAP server: [dropdown] [New...] [Modify...]

LDAP group DN: [text box] [Browse...]

LDAP Group Detail

Group name: [text box]

Display name: [text box]

Email address: [text box]

☐ Override LDAP data

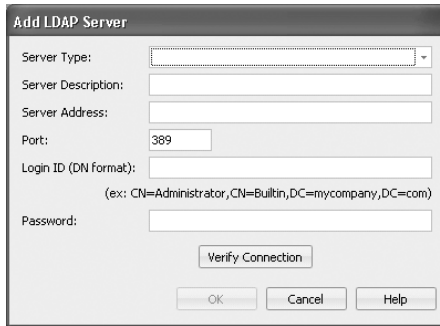
[OK] [Cancel] [Help]

2. You can select an existing server or define a new server.

To select an existing server, click the **LDAP server** box. You can modify that server by clicking **Modify**.

To define a new LDAP server, complete the following steps.

- a. Click **New**. The **LDAP Server** dialog box is displayed.



- b. In the **Server Type** list, click **Microsoft Active Directory Server** or **Generic LDAP Server**.
 - c. In the **Server Description** box, enter a name by which you want to identify this server.
 - d. In the **Server Address** box, enter the DNS (Domain Name System) name of the server.
 - e. In the **Port** box, enter the standard IP port for the LDAP server.
 - f. In the **Login ID** box, enter the DN (distinguished name) of a user with administrative rights.
 - g. In the **Password** box, enter this user's password.
 - h. Click **Verify Connection** to confirm that a connection can be established with the information you have entered. You will see either **Success** or **Failure** to the right of the button.
 - i. Once your connection has been verified, click **OK**.
3. Specify the LDAP user or group DN (distinguished name). You can either enter the DN into the box or click **Browse** to select it from the **Browse LDAP Server – LDAP Server** dialog box.

To browse for the DN, follow these steps.

- a. In the **Base DN** box, type the DN (distinguished name) of the entry at which you want to begin your search.
- b. In the **Filter** box, specify criteria to use in the search. You can enter a filter or click the arrow to search the list of existing filters.
- c. Click **Search**.
- d. Click the pertinent entry in the tree view of the LDAP directory. Click this user's DN entry in the grid.
- e. Click **OK**.

4. If you want to change any of the LDAP detail information for the Barr EOM environment, follow these instructions:
 - For LDAP users, to change the user name, display name, or email address, or to select an existing department, select **Override LDAP data**. The boxes will be made available for entry. You do not need to activate the override function to define a new department. Click **New** and the **Department** dialog box is displayed.
 - For LDAP groups, to change the group name, display name, or email address, select **Override LDAP data**.
5. Click **OK**.

To add a Windows user or group

Follow these steps to add a Windows user.

1. Depending on if you want to add a Windows user or group, complete one of the following procedures:
 - To add a Windows user, from the **Users** tab or **User and Group Selection** dialog box, click **More Users** and then click **Add Windows Users and Groups**. The **Select Users or Groups** dialog box is displayed.
 - To add a Windows group, from the **Groups** tab, click **More Groups** and then click **Add Windows Users and Groups**. The **Select Users or Groups** dialog box is displayed.
2. Click **Object Types** and select **Users** or **Groups**.
3. Click **Locations** and select the area in which you want to search.
4. Enter all or part of the user or group name you want to add and click **Check Names**. If multiple matching entries are found, the **Multiple Names Found** dialog box is displayed so that you can choose the appropriate user or group. You can also perform an advanced user search by clicking **Advanced**.
5. Click **OK**.

To import an LDAP user or group

Use the LDAP Import Utility to import users and groups from an LDAP source. You choose the users and groups to import from an Organizational Unit (OU) container in a specific LDAP server. You can import users, groups, or both users and groups.

Follow these steps to import LDAP users and groups.

1. Open the LDAP Import Utility using one of the following methods:
 - From the **Users** tab or **User and Group Selection** dialog box, click **More Users** and then click **Import LDAP Users and Groups**.
 - From the **Groups** tab, click **More Groups** and then click **Import LDAP Users and Groups**.

2. From the **Specify LDAP Server Connection dialog box**, choose an **LDAP server**. You can choose either an existing server or a new LDAP server.

Lightweight Directory Access Protocol (LDAP) Import Utility

Specify LDAP Server Connection
You must choose an LDAP server or define a new server connection.

Choose LDAP Server:

LDAP Server Details

Server Type: ☐ Modify Server Details

Server Name:

Server Address: (ex: ldap.mycompany.com or 192.168.2.1)

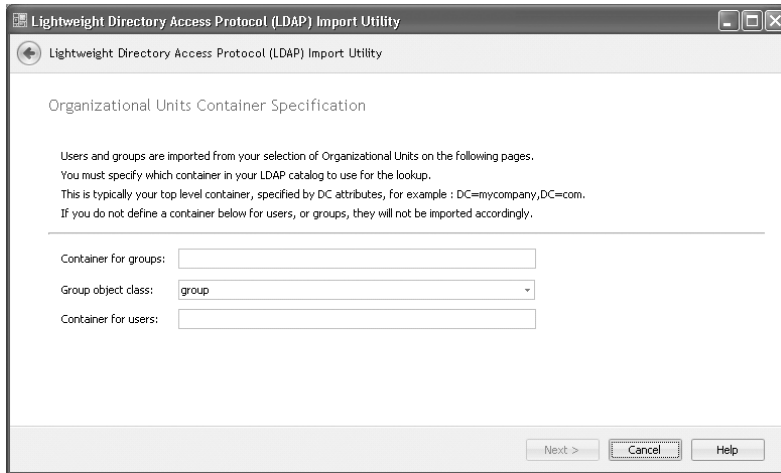
Port: (most servers use port 389)

Login ID (DN Format): (ex: CN=Administrator,CN=Builtin,DC=mycompany,DC=com)

Password:

- To choose an existing server, click the arrow in the **Choose LDAP Server** box and select a server. If you do not want to modify any server details, click **Next** and continue with step 4. If you do want to modify server details, select **Modify Server Details** and continue with step 3, making changes as needed.
 - To define a new LDAP server, click **New**.
3. Specify the LDAP server information.
 - a. In the **Server Type** box, select either **Microsoft Active Directory Server** or **Generic LDAP Server**.
 - b. In the **Server Name** box, type the name by which you want to identify this server.
 - c. In the **Server Address** box, specify the DNS (Domain Name System) name of the server.
 - d. In the **Port** box, type the standard IP port for the LDAP server.
 - e. In the **Login ID (DN Format)** box, type the DN (distinguished name) of a user with administrative rights.
 - f. In the **Password** box, enter the user's password.
 4. Click **Verify Connection** to confirm that a connection can be established with the information you have entered. To the right of the button, you will see either **Success** or **Failure**. You cannot continue with the utility until the connection is successful.

5. Click **Next**. The **Organizational Units Container Specification** dialog box is displayed.



6. Follow these steps to specify the Organizational Unit (OU) container or containers to search.

To import groups, follow these steps.

- a. In the **Container for groups** box, type the Distinguished Name (DN) of the LDAP container from which to import the group or groups.
- b. In the **Group object class** box, either click the arrow in the box to choose an object class within the container or type in a value.
- c. If you are importing only groups, click **Next** and go to step 7.

To import a user or users, follow these steps.

- a. Type the Distinguished Name (DN) of the LDAP container from which to import them in the **Container for users** box.
 - b. Click **Next**.
7. If you are importing only users, go to step 8. Otherwise, follow these steps to import groups.
 - a. The **Select Organizational Units for Group Import** dialog box is displayed. In the tree, select check boxes for the OUs that you want to search. Click **Next**. The **Select Groups to Import** dialog box is displayed.
 - b. From the grid, select check boxes for the groups you want to import. Click **Next**. You can use the **Select All** and **Unselect All** buttons below the grid to select or clear all of the grid items. The **Importing Selected Groups** dialog box is displayed.
 - c. The groups have been imported. Click **Next**.
- If you are importing only groups, go to step 9.

8. Follow these steps to import users.
 - a. The **Select Organizational Units for User Import** dialog box is displayed. In the tree, select check boxes for the OUs that you want to search. If you want to exclude disabled accounts from being imported, select the **Do not import disabled accounts** check box.
 - b. Click **Next**. The **Select User Accounts to Import** dialog box is displayed.
 - c. From the grid, select check boxes for the users you want to import. Click **Next**. The **Importing Selected Users** dialog box is displayed.
 - d. The users have been imported. Click **Next**.
9. Click **Finish** to close the utility.

Configure a user or group

Once you have added users and groups in the **Manage Users** utility, use these procedures to assign and create quota profiles and configure balance settings directly from the grid. For users, you can also configure inheritance to determine if users will inherit quota settings from the group.

Before beginning a particular configuration task, complete these steps.

1. From the EOM console navigation pane, select the **Administration** application.
2. In the navigation pane, click **Manage Users**. The **Manage Users** utility is displayed in the right panel.
3. To configure users, click the **Users** tab. To configure groups, click the **Groups** tab. Use the following procedures to configure users and groups from the appropriate grid.

To set inheritance (only for user configuration)

In the **Users** grid, use the **Inherit** column to determine whether a user is to inherit quota settings from a group. If a user is a member of more than one group, the user inherits settings from only the group that was most recently modified by the administrator.

To specify inheritance of quota settings from the parent group, complete these steps from the **Users** grid.

1. To specify that you want this user to inherit quota settings, including balance settings, select the **Inherit** check box for the user. By default, users are configured to inherit settings from the group.
If you do not want the user to inherit quota settings, clear the check box.
2. Click **Apply**.

To assign a quota profile

The quota profile sets up restrictions based on the type of document, for example, precluding color printing and requiring that documents be duplexed.

To select an existing profile, follow these steps.

1. From the grid, click the **Quota Profile** cell for the appropriate user or group and select a profile from the list.
2. Click **Apply**.

To create a basic quota profile

To create a new quota profile, complete these steps.

1. From the grid, click the appropriate **Quota Profile** cell and then click the Browse button. The **Manage User Quota Profiles** dialog box is displayed.
2. Click **New**. The **User Quota Profile** dialog box is displayed.

New User Quota Profile

Profile name:

Profile description:

Restrictions -- Disable printing:

☐ Always

☐ If page count exceeds:

☐ If document byte count exceeds:

☐ If document contains color

☐ Ignore Windows queue restrictions for this user (if any)

☒ Show client pop-up for this user

Client pop-up general options

☐ Show job cost on pop-up ☐ Allow user to enter additional comments

☐ Allow user to override job costs on pop-up ☐ Show account balance on pop-up

☐ Allow user to specify if job is billable

Select up to five billing lists to be displayed on the client pop-up

Active	Caption	Input Type	Billing List
☐		Drop Down	None Selected
☐		Drop Down	None Selected
☐		Drop Down	None Selected
☐		Drop Down	None Selected
☐		Drop Down	None Selected

☐ Show this pop-up instead of the pop-up (if any) configured for the Windows queue

Advanced... OK Cancel Help

3. Enter a **Profile name** and **Profile description**.
4. To control the documents that are printed, select options under **Restrictions - Disable Printing**. You can choose to always disable printing, limit the maximum document page count or byte count to a specified value, and prohibit the printing of color in a document. You can also choose to disregard any restrictions set for Windows queues.
5. To define notification options, select one of the check boxes under **Restriction Notification Options**. You can notify the user using email or using a pop-up window.

6. To specify that the client pop-up window be displayed for the user, select **Show client pop-up for this user**. Configuration options for the pop-up window are displayed.
 - a. Under **Client pop-up general options**, select the appropriate check box options.
 - b. To select and configure up to five billing lists to be displayed in the client pop-up window, use the grid under **Select up to five billing lists to be displayed on the client pop-up**:
 - Select the **Active** check box for the appropriate rows.
 - Click the **Caption** column and enter the caption text.
 - Click the **Input Type** column to select the input type.
 - Click the **Billing List** column to select a billing list. Billing lists are configured with the **Manage Billing Accounts** utility.
 - c. If you want to display this pop-up window rather than the pop-up window defined for a Windows queue, select **Select this pop-up instead of the pop-up (if any) configured for the Windows queue**. If you have configured a pop-up window for the Windows queue, it is displayed by default. If you select this check box, this pop-up window will be displayed rather than that for the Windows queue.
7. To convert this profile to an advanced profile and manage the profile using rules, click **Advanced**. All selected items will be converted into rules and displayed in the **User Quota Rules Manager** dialog box. Once the profile has been converted to an advanced profile, it cannot be returned to a basic profile. Complete the following steps to create an advanced profile.



- a. If any items were selected on the previous dialog box, they are now listed as rules on the **User Quota Rules Manager** dialog box. Click each rule and review it in the preview section.
 - b. The rules grid lists all of the defined rules in the order that they will be processed. The rules grid is editable. Use the following procedures from the rules grid:
 - To specify whether the rule is enabled or disabled, use the check box in the **Enabled** column.
 - To rename a rule, click the **Name** cell and make the change.
 - To modify the rule description, click the **Description** cell and make the change.
 - To change the follow-on action, click the **Follow-on Action** cell and select the action that you would like to take after this rule has been processed. You can continue processing rules or choose not to process any additional rules.
 - c. Under the rules grid, use the following procedures to configure rules:
 - To create a rule, click **Add**. The **User Quota Rule** dialog box is displayed. For instructions about adding rules, go to “To create user quota rules.”
 - To modify a rule, select a rule and click **Modify**.
 - To delete a rule, select a rule and click **Remove**.
 - To create a copy of a rule, select a rule and click **Copy**. A copy of the selected rule will be created.
 - To reorder the rules, select a rule and click **Move Up** or **Move Down**.
 - d. To save your changes, click **OK** or **Apply**.
8. When you have completed your tasks, click **Close**.

To create user quota rules

Administrators can create user quota rules after converting a basic quota management profile to an advanced quota management profile. Conditions and actions are configured.

To create user quota rules, complete these steps.

1. From the **User Quota Rules Manager** dialog box, click **Add**. The **User Quota Rule** dialog box is displayed.

The screenshot shows the 'New UserQuota Rule' dialog box. It has a title bar with standard window controls. The main area contains several sections: 'Name' and 'Description' text boxes, an 'Enabled' checkbox, a 'Rule definition:' section with a radio button for 'Always execute this rule (no conditions)', a 'When:' section with a list box containing '<Target>', and a 'Perform the following actions:' section with a list box containing '<Action>'. There are buttons for 'Add Condition', 'Remove Condition', 'Add Group', 'Remove Group', 'Add Action', 'Modify Action', 'Remove Action', 'Move Up', and 'Move Down'. At the bottom, there is a 'Follow-on Action:' dropdown menu set to 'Do not process additional rules' and 'OK', 'Cancel', and 'Help' buttons.

2. Enter the **Name** and **Description** for the rule.
3. Specify whether the rule will be enabled or disabled with the **Enabled** check box.
4. To always apply the rule, select the **Always execute this rule (no conditions)** check box. If you select this check box, the **When** box will be unavailable because no condition statements are needed. Go to step 5.

If you do not want to always apply the rule, use the **When** box to create and manage the rule conditions. Multiple conditions can be created and organized into groups. A blue box is used to indicate a condition group. To create a rule condition, perform the following steps.

- a. In the **When** box, click the **<Target>** link. Use the list to select the appropriate condition.
- b. Click the **Operation** link and select the appropriate operation.

- c. Click the **Value** link and select the appropriate value. The condition statement is completed.
To include additional condition statements or create groups of conditions:
 - Select a condition radio button (inside the box) to enable the **Add Condition** and **Remove Condition** buttons for adding and removing condition statements.
 - Select a group radio button (outside the box) to enable the **Add Group** and **Remove Group** buttons for adding and removing groups of conditions. This step will also enable the **Add Condition** button for adding a condition to the selected group.
5. Under the **Perform the following actions** box, use the following procedures to manage actions.
 - To create an action, click the **<Action>** link and select the appropriate action. For the steps for each action type, see “To create actions.”
 - To create additional actions, click **Add Action**.
 - To modify an action, click the desired action link or click the area next to the link and click **Modify Action**.
 - To delete an action, click the area next to the link and click **Remove Action**.
 - To reorder the actions, click the area next to the action link and click **Move Up** or **Move Down**.
6. From the **Follow-on Action** box, choose whether you want to continue processing rules or process no further rules.
7. Click **OK** to save the user quota rule.

To create actions

You can create actions to ignore Windows queue restrictions, override the Windows queue pop-up window, disallow printing, perform cost accounting, route to a specified destination, set the document owner, set the document state, and notify about quota management restrictions. The steps necessary to configure these actions types are listed in the following sections. Perform the steps in the appropriate section to create actions.

To ignore Windows queue restrictions

Select this action if you want restrictions for Windows queues to be disregarded.

In the **Perform the following actions** box, click the **<Action>** link. Select **Ignore Windows queues restrictions**. No further configuration is required.

To override Windows queue pop-up

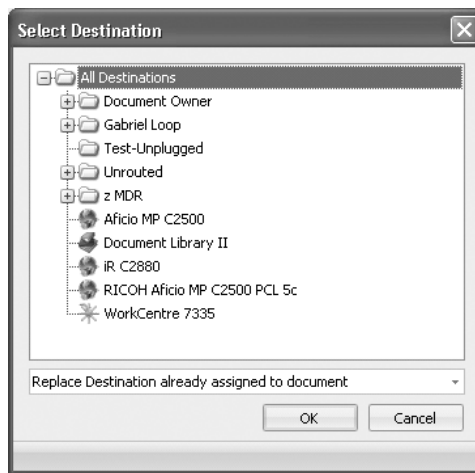
Select this action if you want to display the client pop-up window rather than the pop-up window defined for a Windows queue.

In the **Perform the following actions** box, click the **<Action>** link. Select **Override Windows queue pop-up**. No further configuration is required.

To route to destinations

Select this action to add or replace a destination for a document.

1. In the **Perform the following actions** box, click the **<Action>** link. Select **Route to Destinations** | **Basic**. The **Select Destinations** dialog box is displayed.



2. Select a destination from the tree.
3. Click the box at the bottom to indicate whether this address is to replace an existing address or added to the existing address.
4. Click **OK**.

To disallow printing

Select this action if you want to disable printing for this user or group.

In the **Perform the following actions** box, click the **<Action>** link. Select **Disallow Printing**. No further configuration is required.

To perform cost accounting

Select this action to configure cost accounting options for this rule.

1. In the **Perform the following actions** box, click the **<Action>** link. Select **Perform Cost Accounting**. The **Cost Accounting** dialog box is displayed.

Cost Accounting

Client pop-up general options

☐ Show job cost on pop-up ☐ Allow user to enter additional comments

☐ Allow user to override job costs on pop-up ☐ Show account balance on pop-up

☐ Allow user to specify if job is billable

Select up to five billing lists to be displayed on the client pop-up

Active	Caption	Input Type	Billing List
☐		Drop Down	None Selected
☐		Drop Down	None Selected
☐		Drop Down	None Selected
☐		Drop Down	None Selected
☐		Drop Down	None Selected

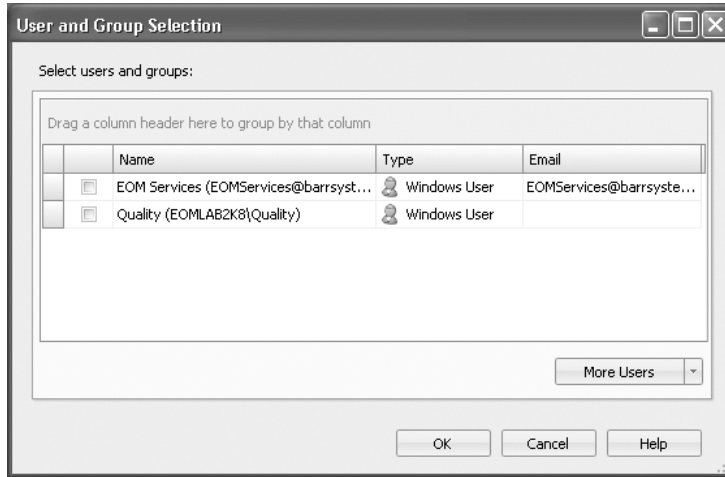
OK Cancel

2. Under **Client pop-up general options**, select the appropriate check-box options.
3. To select and configure up to five billing lists to be displayed in the client pop-up window, use the grid under **Select up to five billing lists** to be displayed on the client pop-up:
 - Select the **Active** check box for the appropriate rows.
 - Click the **Caption** column and enter the caption text.
 - Click the **Input Type** column to select the input type.
 - Click the **Billing List** column to select a billing list. Billing lists are configured with the **Manage Billing Accounts** utility.
4. Click **OK**.

To set a document owner

Select this action to specify the owner of a document.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Set Document Owner**. The **User and Group Selection** dialog box is displayed.



2. Select the appropriate user or group in the grid. If the user or group you want is not listed, click **More Users** to search for additional users.
3. Click **OK**.

To set a document state

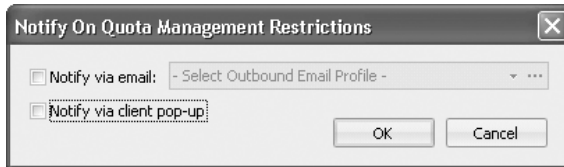
Select this action to change the state of a document.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Set Document State**. The **Set Document State** dialog box is displayed.
2. From the drop-down list, select the appropriate document state: **Hold** or **Ready**.
3. Click **OK**.

To notify about quota management restrictions

Select this action to specify that a user or group be notified about quota management restrictions and the notification method.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Notify on Quota Management Restrictions**. The **Notify on Quota Management Restrictions** dialog box is displayed.



2. You can choose to notify the user or group using email, with a pop-up window, or both.
 - To use email notification, select **Notify via email**. Select an email profile from the drop-down list or click the Browse button to manage profiles from the **Manage Outbound Email Profiles** dialog box.
 - To use a pop-up notification, select **Notify via client pop-up**.
3. Click **OK**.

To specify an email address

You can specify an email address to use for quota profile notifications.

To specify an email address, complete these steps.

1. Click the **Email** cell for the appropriate user or group and enter the email address.
2. Click **Apply**.

To configure balance settings

Administrators can assign print balances to control costs.

To assign a print allowance, complete these steps.

1. Select the **Set Balance** check box. The grid cells to the right will be enabled so that you can define the parameters of the allowance.
2. To specify the print allowance at the beginning of the accounting period, enter the **Initial Balance**.
3. For users, the current remaining balance is displayed in the **Remaining Balance** cell. To adjust the balance amount, click the cell and enter a new amount.
4. To specify the number of days in an accounting period, click the **Refresh Period** cell. You can specify that the balance be refreshed after a certain number of days or on a particular day of the week or month. You can also specify a time for the refresh. When you are finished, click **Apply**.

- For users, you can specify the date that the new accounting period begins. Click the arrow in the **Next Refresh** cell and select a date. You can specify that the balance be refreshed on a particular date or you can specify that it be refreshed today.
- When you are finished, click **Apply**.

Add a department

Follow these steps to add a new department.

- From the EOM console navigation pane, select the **Administration** application.
- In the navigation pane, click **Manage Users**. The **Manage Users** utility is displayed in the right panel.
- Click the **Departments** tab.
- Under the **Departments** grid, click **Add**. The **Department** dialog box is displayed.

Add Department

Department name:

Select the users you want to add to the department:

Drag a column header here to group by that column

	Name	Type
☒	EOM Services (EOMServices@barrsystems.com)	Windows...
☐	Quality (Quality@barrsystems.com)	Windows...
☐	Carl Fisher (Carl.Fisher@barrsystems.com)	Windows...
☐	Becky Senn (becky.senn@barrsystems.com)	Windows...
☐	Beverly George (Beverly.George@barrsystems.com)	Windows...
☐	Christopher McCue (Christopher.McCue@barrsystems.com)	Windows...
☐	Marcela Clupe (Marcela.Clupe@BarrSystems.com)	Windows...

Department members:

Drag a column header here to group by that column

	Name	Type

OK Cancel Help

- Type the name of the new department in the **Department name** box.
- From the **Select users** grid, choose each users that you want to add to the new department by selecting the check box column for the appropriate users. When you are finished, click the right arrow (>) button to move the selected users into the **Department members** grid. You can move all users by clicking the double right arrow (>>) button.

To remove users from the department, select the check box column for users in the **Department members** grid and click the left arrow (<) button. All selected users are returned to the **Select users** grid. You can remove all users by clicking the double left arrow (<<) button.

- When you are finished adding users to the new department, click **OK**.

Modify a user, group, or department

Follow these steps to modify a user, group, or department.

1. From the EOM console navigation pane, select the **Administration** application.
2. In the navigation pane, click **Manage Users**. The **Manage Users** utility is displayed in the right panel.
 - To modify a user, click the **Users** tab. In the grid, select the user you want to modify and click **Modify**.
 - If you select an EOM user, the **EOM User** dialog box is displayed.
 - If you select an LDAP user, the **Edit LDAP User** dialog box is displayed.
 - If you select a Windows user, the **Edit Windows User** dialog box is displayed.
 - To modify a group, click the **Groups** tab. In the grid, select the group you want to modify and click **Modify**. You cannot modify Windows groups.
 - If you select an EOM group, the **EOM Group** dialog box is displayed.
 - If you select an LDAP group, the **LDAP Group** dialog box is displayed.
 - To modify a department, click the **Departments** tab. In the grid, select the department you want to modify and click **Modify**. Use the **Department** dialog box to add and remove department members.
3. Click **OK**.

Remove a user, group, or department

1. From the EOM console navigation pane, select the **Administration** application.
2. In the navigation pane, click **Manage Users**. The **Manage Users** utility is displayed in the right panel.
3. Click the **Users** tab, **Groups** tab, or **Departments** tab.
4. In the grid, select the user, group, or department you want to remove and click **Remove**.

4.9 Convert/Restore Windows queues

Barr EOM will often be installed in an existing print environment. This means there will already be one or more Windows print servers, each serving dozens or hundreds of Windows queues. You can use the Barr EOM Device Wizard to easily convert these Windows queues to Barr EOM sources. All documents sent to the converted Windows queue will be automatically received in Barr EOM through the new source. You can also choose to create a Barr EOM destination for the queue. Barr EOM will automatically configure the source to route to the destination. This is useful because no change will appear to the end users - they will print and receive their documents as usual.

If you decide you no longer want the Windows queue routed through Barr EOM, you can also easily restore the Windows queue.

Convert Windows queues

Complete the following steps to covert existing Windows queues to Barr EOM sources and destinations.

1. From the EOM Console, select Tools | **Device Wizard**.



2. Select **Convert Windows Queues on one or more Print Servers**.
3. On the **Print Server Selection** page, select the **Server** that contains the Windows queues you want to convert. Click **Next**. Only servers with the Barr EOM Input Service running will be listed in the grid. If the server you want is not listed, start/install the Barr EOM Input Service on that server and try again.
4. On the **Conversion Method** page, select the conversion method you want to use. You can choose from the following options:
 - **Complete Conversion** – (recommended) Creates both a new EOM source and EOM destination on the chosen print servers for each detected Windows queue.
 - **Sources Only** – Creates only a new EOM source on the chosen print servers for each detected Windows queue.
 - **Destinations Only** – Creates only a new EOM destination on the chosen print servers for each detected Windows queue. This will create a single EOM destination when multiple printers/ports share the same IP address and queue name or port number.

5. On the **File Store and Groups** page, configure the grid as necessary. Depending on the conversion method selected, columns will display for source and/or destination configuration. When finished, click **Next**.
 - Select the **File Store** to be associated with the new source. All file stores defined in the Set General Preferences Utility are displayed.
 - Choose the **Source Group** where the new source will be created. The new source will use the same name as the Windows queue.
 - Choose the **Destination Group** where the new destination will be created. The new destination will use the same name as the Windows queue.
6. On the **Windows Queues** page, the grid displays all of the Windows queues found on the selected server that are using one of the following Windows ports: LPR port, Standard TCP/IP port, HP Standard TCP/IP port, or SC2 TCP/IP port. In the **Convert** column, select **Convert** for the Windows queues you want to convert. Click **Next**.
7. On the **Confirmation of Action** page, click **Convert** to convert the Windows queues. When the conversion is complete, the **Device Wizard Log** dialog box displays. You can save the log file by clicking **Save**.
8. Click **Finish**.



Use the **Manage Windows Queues** utility to configure quota management profiles for the converted queues. Quota management profiles can be configured to set up restrictions based on the type of document. Examples include disallowing color printing, requiring documents to be duplex, and disabling print from certain applications.

Convert Windows queues (advanced mode)

Complete the following steps to convert existing Windows queues to Barr EOM sources and destinations using advanced mode.

1. From the EOM Console, select Tools | **Device Wizard**.
2. Select **Convert Windows Queues on one or more Print Servers and Advanced mode**.
3. On the **Print Server Selection** page, select the **Server** that contains the Windows queues you want to convert. Click **Next**. Only servers with the Barr EOM Input Service running will be listed in the grid. If the server you want is not listed, start/install the Barr EOM Input Service on that server and try again.

4. On the **Windows Queues** page, configure the grid as necessary. You can choose to create a source and/or destination for each queue. When finished, click **Next**.
 - If you select **Create Source**, select **File Store** and **Source Group** to be associated with the new source. All file stores defined in the Set General Preferences Utility are displayed. The new source will use the same name as the Windows queue.
 - If you select **Create Destination**, select the **Destination Server**, **Destination Type**, and **Destination Group**. The new destination will use the same name as the Windows queue.
 - By default, the **Create single destination for multiple queues when possible** check box is selected. This will create a single EOM destination when multiple printers/ports share the same IP address and queue name or port number. If this is not selected, new EOM destinations are created for each queue converted.
5. On the **Confirmation of Action** page, click **Convert** to convert the Windows queues. When the conversion is complete, the **Device Wizard Log** dialog box displays. You can save the log file by clicking **Save**.
6. Click **Finish**.



Use the **Manage Windows Queues** utility to configure quota management profiles for the converted queues. Quota management profiles can be configured to set up restrictions based on the type of document. Examples include disallowing color printing, requiring documents to be duplex, and disabling print from certain applications.

Restore Windows queues

Complete the following steps to restore converted Windows queues.

1. From the EOM Console, select Tools | **Device Wizard**.
2. Select **Restore previously converted Windows Queues** and click **Next**.
3. On the **Print Server Selection** page, select the server that contains the converted queues. Click **Next**. Only servers with the Barr EOM Input Service running will be listed in the grid. If the server you want is not listed, start the Barr EOM Input Service on that server and try again.
4. On the **Restore Windows Queues** page, all of the converted Windows queues for the selected server are listed in the grid. Select the Windows queues you want to restore and click **Next**.
5. On the **Confirmation of Action** page, click **Restore** to restore the selected Windows queues. When the conversion is complete, the **Device Wizard Log** dialog box displays. You can save the log file by clicking **Save**.
6. Click **Finish**.

4.10 Manage Windows queues

Administrators can use the **Manage Windows Queues** utility to create and assign quota profiles to converted and external Windows queues. Quota profiles can be configured to set up restrictions based on the type of document. Examples include disallowing color printing, requiring documents to be duplex, disabling print from certain applications, and so on.

Assign a quota profile

Complete the following steps to assign a quota management profile to a Windows queue.

1. From the EOM Console navigation pane, select the **Administration** application.
2. In the navigation pane, click **Manage Windows Queues**. The **Manage Windows Queues** utility is displayed in the right panel.
3. Select the **Server** tab to configure converted Windows queues or the **Workstation** tab to configure external Windows queues.



The grid is displayed grouped by the **Server Name** column so that you can easily view all queues for a server. You can remove grouping by right-clicking in the group panel and selecting **Clear Grouping**.

4. Click in the **Quota Profile** cell for the appropriate queue. You can select a quota management profile from the list or click the Browse button to create or edit one. Clicking the Browse button will display the **Manage Windows Queues Quota Profiles** dialog box.
5. If you are configuring an external Windows queue, you can also specify the cost per page for black and white and color printing.
6. When you are finished making changes, click **Apply**.

Create a quota profile

Complete the following steps to create a basic quota management profile and assign it to a Windows queue.

1. From the EOM Console navigation pane, select the **Administration** application.
2. In the navigation pane, click **Manage Windows Queues**. The **Manage Windows Queues** utility is displayed in the right panel.
3. Select the **Server** tab to configure converted Windows queues or the **Workstation** tab to configure external Windows queues.



The grid is displayed grouped by the **Server Name** column so that you can easily view all queues for a server. You can remove grouping by right-clicking in the group panel and selecting **Clear Grouping**.

4. Click in the **Quota Profile** cell for the appropriate queue. You can select a quota management profile from the list or click the Browse button to create or edit one. Complete the following steps to create a new profile.
 - a. In the **Quota Profile** cell, click the Browse button. The **Manage Windows Queue Quota Profiles** dialog box is displayed. This dialog box lists all of the defined profiles. When managing profiles, you can create, import, and export profiles, as well as manage all existing profiles.
 - b. Click **New** to create a new profile. The **Windows Queue Quota Profile** dialog box is displayed.

- c. Enter a **Profile name** and **Profile description**.
- d. Under **Restrictions - Disable Printing**, select the conditions under which you want to disable printing. You can choose to always disable printing, or disable printing if the document is not duplex, if the document page count or byte count exceeds a specified value, if the document contains color, or if the number of pages printed in a month exceeds a specified value.
- e. Under **Restriction Notification Options**, determine if you want to be notified when a restriction occurs. You can be notified using an email profile or on the client pop-up.
- f. You can also configure the client pop-up window to display for the Windows queue. To display the pop-up window, select the **Show client pop-up for this Windows queue**. Notice that the client pop-up configuration options are now available.
- g. Under **Client pop-up general options**, select the appropriate check box options.

- h. Under **Select up to five billing lists**, use the grid to select and configure up to five billing lists to be displayed in the client pop-up window.
 - Select the **Active** check box for the appropriate rows.
 - Click in the **Caption** column and enter the caption text.
 - Click in the **Input Type** column to select the input type.
 - Click in the **Billing List** column to select a billing list. Billing lists are configured in the **Manage Billing Accounts** utility.
5. To convert this profile to an advanced profile and manage the profile using rules, click **Advanced**. All selected items will be converted into rules and be displayed in the **Windows Queue Quota Rules Manager** dialog box. Once the profile has been converted to an advanced profile, it cannot be returned to a basic profile. Complete the following steps to create an advanced profile.



- a. If any items were selected on the previous dialog box, they will now appear as rules on the **Windows Queue Quota Rules Manager** dialog box. Click each rule and review in the preview section.
- b. The rules grid lists all of the defined rules in the order that they will be processed. The rules grid is editable. Use the following procedures from the rules grid:
 - To determine whether the rule is enabled or disabled, use the check box in the **Enabled** column.
 - To rename a rule, click in the **Name** cell and make the change.

- To modify the rule description, click in the **Description** cell and make the change.
 - To change the follow-on action, click in the **Follow-on Action** cell and select the action you would like to take after this rule has been processed. You can continue processing rules or choose not to process any additional rules.
- c. Under the rules grid, use the following procedures to configure rules:
- To create a rule, click **Add**. The **Windows Queue Quota Rule** dialog box is displayed.
 - To modify a rule, select a rule and click **Modify**.
 - To delete a rule, select a rule and click **Remove**.
 - To create a copy of a rule, select a rule and click **Copy**.
 - To reorder the rules, select a rule and click **Move Up** or **Move Down**.
6. Click **OK** or **Apply** to save your changes.

4.11 Set general preferences

From the Administration application you can configure general administrative options such as setting the document file store path and the document retention period.

Complete the following steps to configure the options.

1. From the EOM Console navigation pane, select the **Administration** application.
2. In the navigation pane, click **Set General Preferences**. The **Set General Preferences** utility is displayed in the right panel.

Administration

EOM instance name:

Use disconnected mode: ☐

Save auditing information: ☒

Maximum message log size: entries

Save accounting information: ☒

Output history period: days

Retain documents: ☒

Default retention period: days

Maximum retain size: documents

Refresh external resources: ☒

External resource refresh period: minutes

Desktop client refresh period: minutes

Reporting query timeout: seconds

Require strong passwords: ☐

Password expiration period: days

Passwords to save in history:

Global destination capabilities:

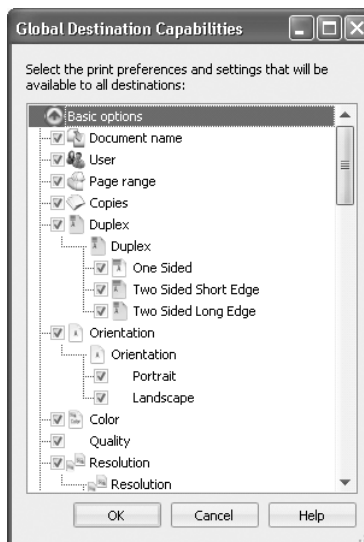
Document file store path:

Location	Default	Status
> \\Eomtest2-2k3\NetworkFileStore	☒	In-use
\\Eomtest2-2k3\Barr Files\FileStore1	☐	In-use

3. Use the **EOM instance name** box to change the instance name, if necessary. The default name is Barr EOM. The instance name is used with licensing and association with an SQL server.
4. Use the **Use disconnected mode** check box to determine if Barr EOM will operate in a disconnected mode when the database or the Barr EOM DBM Service is unavailable (i.e. a fatal error occurs, network connectivity is lost, etc). In disconnected mode, sources and destinations continue to process documents. Once documents are received, they are either routed to an assigned destination (if configured on the **Output settings** tab) or held as unrouted. When the database or service becomes available, full operation will resume automatically.

5. Use the **Save auditing information** check box to determine if you want to save auditing information in the Audit Console. Audit information focuses on security-related actions performed by users. Auditing information is saved by default.
6. Specify the **Maximum message log size** using the spin box. The default maximum is 10,000 entries. If the maximum value is reached, Barr EOM performs a cleanup routine to remove the oldest messages. This will reduce the message count to match the maximum number of messages.
7. Use the **Save accounting information** check box to save or discard accounting information. Accounting information is saved by default.
8. In the **Output history period** box, specify the number of days that will be saved in the **Destination Output History** window. The default period is 1095 days (3 years).
9. Use the **Retain documents** check box to enable/disable document retention. When you enable the retain feature, documents are saved to the retain folder after they print or are deleted from the EOM Console. If you do not want to save deleted or printed documents, disable the retain feature. Documents are retained by default.
10. If you are retaining documents, set the **Default retention period** using the spin box. The default period is 7 days.
11. If you are retaining documents, specify the **Maximum retain size** using the spin box. The default maximum is 100,000 documents. If the maximum value is reached, Barr EOM performs a cleanup routine to remove the oldest documents. This will reduce the document count to match the maximum number of documents.
12. Use the **Refresh external resources** option to enable or disable the refreshing of external resources used by Barr EOM. External resources are any resource (e.g. CSV file, banner, etc.) not stored in the **Resource Manager**. When this option is selected, the **External resource refresh period** option is available for specifying the time period in minutes.
13. Use the **Desktop client refresh period** option to specify how often the complete list of billing accounts is passed down to all the clients. If you create new billing accounts, these will not be available until the next refresh. The default value is 60 minutes.
14. Use the **Reporting query timeout** option to specify the reporting query timeout period. Reporting queries by default time out in 30 seconds. If you have a report that is timing out, and you do not mind waiting longer you can increase this timeout period. (Generally, a better solution is to determine why the query is taking so long to complete. For example, decreasing the **Output History Period** option will reduce the number of rows in the output history table and will cause most reports to run faster).

15. Configure password settings using the following options:
 - a. Determine if you want to use **Strong password composition**. If enabled, passwords must meet the following requirements: minimum of 8 characters, contain at least 1 upper case alpha character, contain at least 1 lower case alpha character, contain at least one number, contain at least one special character, and not contain the same character more than twice.
 - b. Specify the **Password expiration period** in days. When the expiration period is reached, you must create a new password. Passwords must not be changed more than once in a 24-hour period without intervention by a security administrator.
 - c. Specify the number of **Passwords to save in history**. When changing passwords, any passwords saved history are not allowed to be reused.
16. Configure the **Global destination capabilities**. This determines which print preferences/document properties are supported throughout Barr EOM. You can configure these settings manually or import settings from an existing PFD (Printer Family Definition) or CSD (Command Set Definition). To configure the properties manually, complete the following steps.
 - a. Next to **Global destination capabilities**, click **Configure**. The **Global Destination Capabilities** dialog box is displayed. All of the document properties available in Barr EOM are listed and grouped into the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category and view the associated properties, click the down arrow next to a category name. To collapse a category, click the up arrow.



- b. Expand the appropriate category. All of the document properties that belong to that category are listed. Select the check boxes for properties you want to be available for configuration throughout Barr EOM. Clear the check boxes for properties you do not want to be available.

If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured.

Repeat this step until all properties are configured.



Here is an example of how to configure the Resolution property so users can only select a Resolution of 75, 100, or 150. First, expand the **Basic options** category by clicking the down arrow next to the category name. Next, select the check box next to the **Resolution** property. This will make the property available for configuration throughout Barr EOM. Finally, under the Resolution property select the check boxes next to the options you want to be available for selection. In this example, you would select the check boxes next to 75, 100, and 150. Clear the check boxes next to the remaining Resolution options.

- c. When all properties are configured, click **OK**.



You can further restrict these options for individual destinations by configuring **Destination specific capabilities** from the destination's **More settings** tab.

17. The **Document file store path** box, grid lists all of the configured file stores on this Barr EOM database. The Barr EOM database only stores the properties of a document. The actual files are stored in network folders, called file stores. Use the following procedures to configure the file stores.



Make sure that the file store folder does not contain any empty folders. Empty folders in the file store folder will be deleted when the EOM cleanup process runs.

- To add a file store, click **Add**. From the **File Store** dialog box, enter the network folder path where the Barr EOM files are stored or click Browse button to select a folder. The Barr EOM DBM Service will need to have permissions assigned to access the selected network folder. Verify the file store folder does not contain any empty folders. Empty folders in the file store folder will be deleted with the EOM cleanup process runs.
- To select a default file store, in the grid click the **Default** check box cell for the appropriate file store. The default file store will be used when a file store has not been specified. By default sources are configured to use the default file store on the **More settings** tab. If you change the default file store in the grid, all sources using the default will also be updated.
- To modify a file store, select a file store in the grid and click **Edit**. The **File Store** dialog box is displayed.

- To view usage details of the drive where the file store is located, select a file store in the grid and click **Details**.
- To remove a file store, select file store with a status of **New** and click **Remove**. You can only remove file stores with a **New** status.

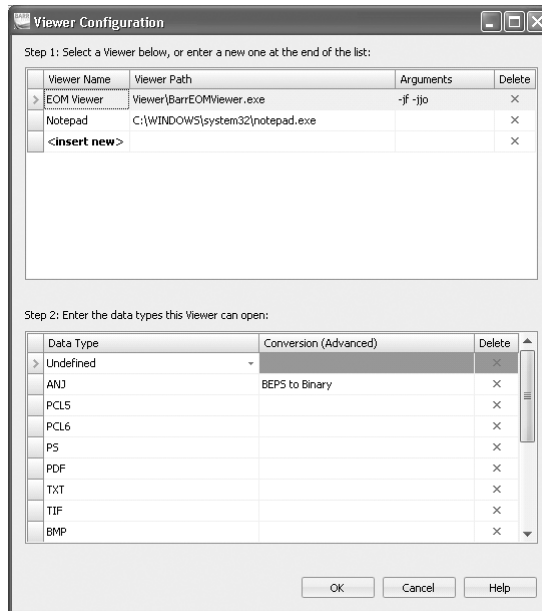
18. To save the changes, click the **Apply** button.

4.12 Define Viewer utilities

Barr EOM allows you to define the Viewer utilities that display when you right-click documents in the EOM Console. You can configure the data types that each Viewer utility can open.

Complete the following steps to define and configure Viewer utilities.

1. From the EOM Console menu bar, select Tools | **Configure Viewer**. The **Viewer Configuration** dialog box displays.



2. The first grid lists the Viewer utilities that will be available when right-clicking documents in the EOM Console. To add a new Viewer utility, complete the following steps.
 - a. Click **<insert new>** in the **Viewer Name** column at the bottom of the list. Enter the name of the Viewer utility. This name will display when you right-click documents in the EOM Console.
 - b. In the **Viewer path** column, enter the path and file name of the Viewer utility executable. You can type the path and file name or click the Browse button in the cell to navigate.
 - c. In the **Arguments** column, enter any command line options or switches that will be used to start the utility with the desired configuration. The Viewer utility is now added.



You can delete Viewer utilities by clicking the X in the **Delete** column.

3. Select the Viewer utility you want to configure. The second grid displays the data types this Viewer utility can open. Complete the following steps to configure the data types for the selected Viewer.
 - a. Click **<insert new>** in the **Data Type** column. Choose a data type this Viewer can open.
 - b. If necessary, click in the **Conversion (Advanced)** column to assign a conversion. You can choose to convert files from the Barr Enterprise Print Server (.tnj) file format to one of the following types: binary (.bin), text (.txt), or Xerox (.xrx).
 - c. Continue this procedure until you have selected all of the necessary data types for the selected Viewer. You can delete data types by clicking the X in the **Delete** column.
4. Click **OK**.

4.13 Backup and restore Barr EOM

You can configure Barr EOM to backup and restore the Barr EOM database. You should make periodic database backups in case something causes the EOM database to become unusable. If necessary, you could restore your database from a list of backups according to the date the backup was completed.

Schedule periodic backups

The Windows Scheduled Tasks utility automates the process of periodically performing SQL database backups using the EOM command line backup utility (EomBackupDatabase.exe).

Complete the following steps to automate the database backup.

1. Open the Windows **Scheduled Tasks** utility. Click Start | All Programs | Accessories | System Tools | **Scheduled Tasks**.
2. On the menu bar, click File | New | **Scheduled Task**. A new task will display in the grid.
3. Type a name for the task (for example, Backup EOM Database).
4. Complete the following steps to configure the task.
 - a. Double-click the new task or right-click the task and click **Properties**.
 - b. From the **Task** tab, enter the command line in the Run text box. You should test the command from the command prompt first to verify you get the expected results. (See the “To backup from the command prompt” section for instructions.) The following is an example command:
EomBackupDatabase -database=EOM_2.0.604.4 -Server=Serverxp2 -Folder="C:\Program Files\Barr Systems\EOM\Database\Backup" -Keep=10
 - c. In the **Start in** box, enter the folder where the program is located (C:\Program Files\Barr Systems\EOM\).
 - d. In the **Run as** box, enter the appropriate user information.
 - e. Click **Set password** and enter and confirm the password for the user in the **Run as** box.
 - f. From the **Scheduled** tab, set the desired schedule. Creating an SQL backup puts some load on SQL Server, so you should attempt to perform the backup when you estimate that your system will be idle.
5. Click **OK**. The task will appear in the grid. The **Next Run Time** column will display the date and time the backup will be performed.

Restore a backup

Backups can be restored using SQL Server Management Studio if necessary. To perform a restore, the database version must match the product version. Under some circumstances a previous version of the database can be restored and then upgraded using the database creation utility. However, typically the most recent backup will represent the least amount of data loss. Older backups from previous versions will represent the most amount of data loss.

Complete the following steps to restore a database.

1. Stop all Barr EOM services that use the database that you intend to restore.
2. Open **SQL Server Management Studio** to restore the database from a backup file.
3. Right-click the **Databases** folder and select **Restore Database**.
4. In the **To database** box, select the database you want to restore or type the name in the box.

5. Select **From device** and browse to the desired backup file. You will typically select the latest backup file unless there is a configuration problem you are trying to avoid. The file will display in the **Select the backup sets to restore** grid.
6. In the grid, select the check box next to the database you want to restore.
7. Click **OK**. SQL Server Management Studio will display success or failure.
8. After the database is restored successfully, restart the Barr EOM services.



Keep in mind that any configuration or activity that occurred after the backup was performed will not be present. The documents and their respective states will also be current as of the backup date and time.

Backup from the command prompt

You can use the EomBackupDatabase.exe command line utility to manually backup an SQL database to a folder. You can enter parameters to limit the number of backup files that will be saved by deleting the oldest backups. The following table lists the available parameters. Executing the command without any parameters causes it to display usage information.

1. Enter the following command at the command prompt to perform a backup:
EOMBackupDatabase.exe -Database=DatabaseName Parameters
2. After **-Database=**, type the database name.
3. After the database name you can type any of the necessary parameters listed in the following table. Separate the parameters with a space.

Parameter	Explanation
-Server=SQLServer\Instance	Where SQLServer\Instance is the name of the SQL Server\Instance where the database is located. The default server is LocalHost\SqIExpress. The server name is required if SQL Server is installed on a different computer from where the back up is being performed and SQL Express is not being used. If an instance name is used, it must be specified. SQL Express typically installs a named instance of SQLEXPRESS. Installations of other versions of SQL Server typically do not use a named instance by default, so the instance is usually not needed.

Parameter	Explanation
-Folder= <i>BackupFolderPath</i>	Where <i>BackupFolderPath</i> is the location where the backup file will be saved. If the location does not exist, it will be automatically created. File shares and any path containing spaces must be wrapped in quotation marks (""). If a backup folder is not specified, the files will be saved in the default path, \\Program Files\\Barr Systems\\EOM\\Database\\Backup. The backup file will be saved with a unique file name using the database name, date, and time. This makes it easy to see when the backup was taken. If you want to configure the software to automatically purge older backup files, always use the same backup folder. Using a folder on another computer will provide some safety at the cost of additional network traffic.
-Keep= <i>NumberOfBackupsToKeep</i>	Where <i>NumberOfBackupsToKeep</i> is the maximum number of backups to keep in the specified folder. After a backup is performed for a database, the backup files are sorted and the oldest files are deleted until the number of files to keep is reached. By default 30 backup files are kept. To disable purging, enter KEEP=0. All backup files will be saved.

4. Press **Enter**.

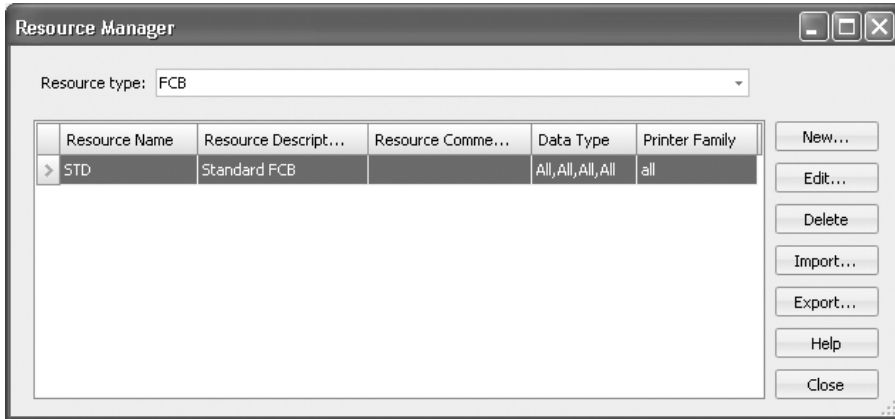
4.14 Manage resources

From the **Resource Manager** dialog box you can manage all Barr EOM resources. Resources are available to any Barr EOM service, running on any server. For example, 2 Barr EOM Output Services running on 2 different servers could use the same resources. The following are the available resource types: CpMillUnitLibrary, CpMillProfile, banner, PrinterControlFile, FCB, CsvDocProp, binary, text, and Ini. Resources are used in business rule and output process actions.

Add resources

Complete the following steps to create Barr EOM resources. The resources created in the Resource Manager dialog box can be used in business rule and output process actions.

1. From the EOM Console menu bar select Tools | **Resource Manager**. The **Resource Manager** dialog box displays.



2. In the **Resource type** list, select the resource type you want to create.
3. Click **New**. The dialog box that displays varies depending on the selected **Resource type**.
 - **CpMillUnitLibrary** – Javascript programs used for Advanced Document Modification. Displays the **Configure Unit Library** dialog box.
 - **CpMillProfile** – Text files describing Compart transform configuration data for specific file formats. Displays the **Configure Filter Profile** dialog box.
 - **Banner** – Text files used for banners or trailers that may contain document properties. Displays the **Banner Resource** dialog box.
 - **PrinterControlFile** – Reserved for printer control files, not presently used. Displays the **PrinterControlFile Resource** dialog box.
 - **FCB** – Form Control Block used by DCOs for various record conversions. Displays the **FCB Resource** dialog box.
 - **CsvDocProp** – Comma separated values representing document properties. Displays the **CsvDocProp Resource** dialog box.
 - **Binary** – Binary files used by output process actions. Displays the **Binary Resource** dialog box.
 - **Text** – Text files used by output process actions. Displays the **Text Resource** dialog box.
 - **Ini** – Displays the **Ini Resource** dialog box.
4. Click **OK**.

To configure a CpMillUnitLibrary resource

Unit libraries are JavaScript modules that CpMill calls at certain known times while processing a document (for example, begin document, page start, page end, etc.). The modules can modify the contents of the document, extract information from the document, write the document, or parts of it, to a new location, or perform many other operations. For more information on configuring unit libraries, contact Barr Systems LLC Professional Services.

Complete the following steps to create a unit library.

1. From the **Configure Unit Library** dialog box, enter the unit library **Name**, **Description**, and any **Comments**.
2. In the **Document Properties Needed** list, select the document properties needed by the unit library. These properties will be written to a file called *<filename>.properties* when Barr EOM calls the document modification software. This file can be opened and read in by the unit library.
3. In the **Filters Needed** list, select the filters needed for the unit library. These filters will be written to a temporary location which will be sent to the document modification software.

Tips on selecting filters:

- Select any expected input types and output types
 - If any interim data types are to be used in the script, include those types as well
 - It is recommended to include the NUL file type
4. If you want to import the unit resource data, under **Import Resource Data**, click **Browse** and select the appropriate resource file. Specify the **Code page** to be used with the resource data. The resource data will display in the **Unit** box.
 5. Under **Unit**, specify the unit library. Enter the unit library code within the `<script> </script>` tags in the appropriate event handler sections.



You can further restrict these options for individual destinations by configuring **Destination specific capabilities** from the destination's **More settings** tab.

6. If necessary, click **Reload Variables from Unit** to populate the **Output variables** grid with any output variables defined in the unit library.
7. Click **OK**.

To configure a CpMillProfile resource

Complete the following steps to configure a filter profile.

1. From the **Configure Filter Profile** dialog box, specify the **Data type** of the filter profile.
2. Enter the resource **Name**, **Description**, and any **Comments**.

3. The **Filter Profile** box, contains the data for the transform software to use during transform operations. It is not recommended to create one from scratch. For a custom filter profile, copy the profile data from the appropriate default CpMillProfile resource for the desired data type. Then modify it as necessary in the new profile being created.
4. Click **OK**.

To configure a banner resource

Complete the following steps to create a banner resource.

1. From the **Banner Resource** dialog box, enter the resource **Name**, **Description**, and any **Comments**.
2. In the **Printer Family** list, use the check boxes to determine if the resource will be used for all printer families or only for certain printer families.
3. In the **Data Type** list, use the check boxes to determine if the resource will be used for all data types or only for certain data types.
4. If you want to import the banner resource data, under **Import Resource Data**, click **Browse** and select the appropriate resource file. Specify the **Code page** to be used with the resource data. The resource data will display in the **Resource Editor** box.
5. In the **Resource Editor** box, enter the text to be used for the banner data. You may also embed document properties and functions within the text using the editor's context menu.



You may alternately use Barr's BDL (Banner Definition Language) that was employed in our legacy product (Barr Enterprise Print Server). This results in a neatly formed banner page.

6. Click **OK**.

To configure a PrinterControlFile resource

Complete the following steps to create a PrinterControlFile resource.

1. From the **PrinterControlFile Resource** dialog box, enter the resource **Name**, **Description**, and any **Comments**.
2. In the **Printer Family** list, use the check boxes to determine if the resource will be used for all printer families or only for certain printer families.
3. In the **Data Type** list, use the check boxes to determine if the resource will be used for all data types or only for certain data types.
4. If you want to import the PrinterControlFile resource data, under **Import Resource Data**, click **Browse** and select the appropriate resource file. Specify the **Code page** to be used with the resource data. The resource data will display in the **Resource Editor** box.
5. In the **Resource Editor** box, enter the control codes for a specific printer to enable or disable features. This is typically created using a Hex editor.
6. Click **OK**.

To configure an FCB resource

The forms control buffer (FCB) defines the page layout for output sent to a printer. FCBs apply to laser and impact printers. A default FCB is associated with each form used for printed output. Complete the following steps to create an FCB resource.

1. From the **FCB Resource** dialog box, enter the resource **Name**, **Description**, and any **Comments**.



The FCB name is important since the FCB selection from the output process or business rule action will select an FCB resource based on the Document Property field used. In most cases the Document.Property.Form Name field is used as the variable in selecting the FCB resource. For example, if you receive a file from the mainframe via RJE the PDIR record is processed and any form name found is mapped to the Form Name document property. Then during conversion, the corresponding FCB resource will be used to format the report. A PDIR form name of CHKS would expect that there was an FCB resource defined named CHKS and would apply the CHKS FCB resource. If the action cannot find the FCB resource it will apply STD.

2. In the **Printer Family** list, use the check boxes to determine if the resource will be used for all printer families or only for certain printer families.
3. In the **Data Type** list, use the check boxes to determine if the resource will be used for all data types or only for certain data types.
4. If you want to import the FCB resource data, under **Import Resource Data**, click **Browse** and select the appropriate resource file. The resource data will display in the **Resource Editor** box.
5. In the **Lines/Inch** list, determine the line spacing. You can change the value to 8 to tighten the line spacing and enable more data to fit on a page. The default is 6 lines per inch.



You can set the top margin by reviewing the **Lines/Inch** value and adding a channel stop at the desired line number. For example, if you want a half-inch top margin and the FCB is configured with the defaults (6 lines per inch, 66 lines per page), you would set channel stop 1 at line 3.

6. In the **Printable lines/page** box, enter the number of lines that will print per page. For example, if there are 66 **Lines/Page** and you enter 60 **Printable lines/page**, then you will print lines 1 through 60 on each page of the document.



You can set the bottom margin by changing the **Printable lines/page** value. By default the **Printable lines/page** value is equal to the **Lines/page** value. For example, if you want a half-inch bottom margin and the FCB is configured with the defaults (6 lines per inch, 66 lines per page), you would set **Printable lines/page** value to 63 lines per page.

7. In the **Lines/page** box, determine the page length. This number is calculated by multiplying the length of the paper (usually 11 inches) by the number of lines per inch (usually 6). The default is 66 lines per page. This will change the size of the FCB that is sent with the data.

8. To add a channel stop, click **Add**. The **Add Channel** dialog box displays. Enter the channel stop and line number. Channel stops must be entered as a decimal value from 1 to 12. To enter hexadecimal values for A, B, and C, enter 10, 11, and 12 respectively. The hexadecimal value is written correctly as 0A, 0B, and 0C when the FCB file is saved. When finished, click **OK**.



Channel stops are used to define vertical spacing. When a printer encounters a command to advance to a channel stop, the print head moves to the specified line and the data is printed. Channel stop 1 usually indicates the top of the form or the first line where the printer will begin printing.

9. To change the FCB's sort order, click the **Channel** or **Line Number** column headings. When you click a column heading, the data of both columns will sort in ascending order based on the column selected.
10. Click **OK**.

To configure a CsvDocProp resource

Complete the following steps to create a CsvDocProp resource.

1. From the **CsvDocProp Resource** dialog box, enter the resource **Name**, **Description**, and any **Comments**.
2. In the **Printer Family** list, use the check boxes to determine if the resource will be used for all printer families or only for certain printer families.
3. In the **Data Type** list, use the check boxes to determine if the resource will be used for all data types or only for certain data types.
4. If you want to import the CsvDocProp resource data, under **Import Resource Data**, click **Browse** and select the appropriate resource file. Specify the **Code page** to be used with the resource data. The resource data will display in the **Resource Editor** box.
5. In the Resource Editor box, enter comma separated values (CSV) or text. You can also create a resource with a table of information using the CSV format.
6. Click **OK**.

To configure a binary resource

Complete the following steps to create a binary resource.

1. From the **Binary Resource** dialog box, enter the resource **Name**, **Description**, and any **Comments**.
2. In the **Printer Family** list, use the check boxes to determine if the resource will be used for all printer families or only for certain printer families.
3. In the **Data Type** list, use the check boxes to determine if the resource will be used for all data types or only for certain data types.
4. If you want to import the binary resource data, under **Import Resource Data**, click **Browse** and select the appropriate resource file. The resource data will display in the **Resource Editor** box.

5. The **Resource Editor** box is a special edit area that accepts only hexadecimal digits (0-9 and A – F). Enter the binary data without regard to spacing. The spacing is taken care of automatically by the editor.
6. The **Create Hex Size** box, can be used to set the data capacity. Entering a number in the text box and clicking **Create Hex Size** has the following effect:
 - If there is already data in the edit area, any data at or below the new size will remain intact. Any data beyond the new specified size will be erased from the editor.
 - If existing data is smaller than the new size, the space after existing data is padded with empty bytes (00) up to the requested size.
 - If no data currently exists in the editor when setting the size, the editor is filled with empty bytes (00) up to the requested size.
7. Click **OK**.

To configure a text resource

Complete the following steps to create a text resource.

1. From the **Text Resource** dialog box, enter the resource **Name**, **Description**, and any **Comments**.
2. In the **Printer Family** list, use the check boxes to determine if the resource will be used for all printer families or only for certain printer families.
3. In the **Data Type** list, use the check boxes to determine if the resource will be used for all data types or only for certain data types.
4. If you want to import the text resource data, under **Import Resource Data**, click **Browse** and select the appropriate resource file. Specify the **Code page** to be used with the resource data. The resource data will display in the **Resource Editor** box.
5. In the **Resource Editor** box, enter the text data.
6. Click **OK**.

To configure an Ini resource

Complete the following steps to create an Ini resource.

1. From the **Ini Resource** dialog box, enter the resource **Name**, **Description**, and any **Comments**.
2. In the **Printer Family** list, use the check boxes to determine if the resource will be used for all printer families or only for certain printer families.
3. In the **Data Type** list, use the check boxes to determine if the resource will be used for all data types or only for certain data types.
4. If you want to import the text resource data, under **Import Resource Data**, click **Browse** and select the appropriate resource file. Specify the **Code page** to be used with the resource data. The resource data will display in the **Resource Editor** box.

5. In the **Resource Editor** box, enter text, document properties, and functions as necessary.
To insert document properties, right-click in the box, select **Insert Document Property**, and choose the appropriate properties. The document properties will display enclosed in brackets ({}).
To insert functions, right-click in the box, select **Insert Function**, and choose the appropriate function. Review the Using EOM functions help topic for information on configuring functions.
6. Click **OK**.

Modify resources

Complete the following steps to modify a resource.

1. From the EOM Console menu bar select Tools | **Resource Manager**. The **Resource Manager** dialog box displays.
2. In the **Resource type** list, select the appropriate resource type.
3. In the grid, select the resource you want to change and click **Modify**. The dialog box that displays varies depending on the type of resource selected.
4. Make the necessary resource changes and click **OK**.
5. Click **OK**.

Remove resources

Complete the following steps to remove a resource.

1. From the EOM Console menu bar select Tools | **Resource Manager**. The **Resource Manager** dialog box displays.
2. In the **Resource type** list, select the appropriate resource type.
3. In the grid, select the resource you want to delete and click **Delete**.
4. Click **OK**.

Import resources

Complete the following steps to import a resource.

1. From the EOM Console menu bar select Tools | **Resource Manager**. The **Resource Manager** dialog box displays.
2. In the **Resource type** list, select the resource type you want to import.
3. Click **Import**.
4. Select the resource file you want to import and click **Open**. You can import previously exported Barr EOM resources.

5. The resource will appear in the grid.



If a resource of that type and name already exists in the grid, the newly imported resource will have a sequence number appended to its name.

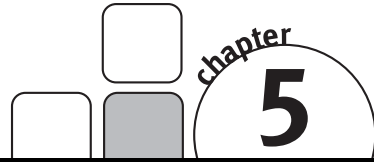
6. Click **OK**.

Export resources

Complete the following steps to export a resource.

1. From the EOM Console menu bar select Tools | **Resource Manager**. The **Resource Manager** dialog box displays.
2. In the **Resource type** list, select the resource type you want to export.
3. In the grid, select the resource you want to export.
4. Click **Export**.
5. Choose the location you want to save the resource file and enter a **File name**.
6. Click **Save**. Exported resource files contain the resource name, type, description, and the resource data in an XML format.
7. Click **OK**.

Use HTML Help



HTML Help provides information about installing, configuring, and operating the Barr EOM software. HTML Help provides a combination of the standard Help window with the added functionality of an Internet browser. It incorporates an easy-to-use table of contents, a comprehensive index and glossary, and a full text search with advanced search capabilities. HTML Help can be accessed at any time by pressing F1, clicking a **Help** button, or by selecting Help | **Contents and Index** on the menu bar. You can also access new Help topics by visiting our Web site at www.barrsystems.com.

5.1 Launch the Help

Use any of the following methods to open the Barr EOM Help.

From the window

You can launch the HTML Help by selecting Help | **Contents and Index** on the menu bar. Alternatively, press F1 to launch HTML Help and display information about the software window.

From dialog boxes

From any Barr EOM dialog box, click **Help** to launch HTML Help and open the topic relating to the dialog box. Alternatively, press F1.

From the taskbar

After you install the software, you can launch HTML Help from the program menu, even when the software is not running. From the taskbar, click Start | All Programs | Barr Systems | Barr EOM | **Help**.

5.2 Navigate within the Help

You can browse through Help topics or use the **Contents**, **Index**, **Search**, or **Favorites** tabs to locate the topic of your choice.

Browse through Help topics

It is often helpful to browse through Help topics when looking for information.

Use the **Back** button to move backward in the sequence of topics you have viewed.

Use the **Forward** button to move forward in the sequence of topics you have viewed.

Use the Contents tab

The table of contents in an HTML Help system is a tree outline that displays topics in an expandable/collapsible hierarchy.

Follow these steps to find a topic in the table of contents.

1. Select the **Contents** tab.
2. Open or close books by clicking them. A closed book has a plus sign (+) next to it, and an open book has a minus sign (-).
3. Click the topic you want to view.

Use the Index tab

The index provides a multilevel list of keywords that are found in the Help. The index is hierarchical (such as you might find at the back of a book) and can include multiple levels.

Complete the following steps to find a topic using the index.

1. Select the **Index** tab.
2. Type a word or scroll through the list of index entries.
3. To see any topics associated with a keyword, double-click it or select it from the list and click **Display**.
4. If there is more than one topic associated with a keyword, select a topic from the **Topics Found** dialog box.



Topics are often indexed under more than one entry.

Use the Search tab

With the **Search** tab, you can perform a full-text search. With full-text searching, you can search through every word in the Help system. A basic search consists of the word or phrase you want to find. Advanced searches can incorporate Boolean operators, wildcard expressions, nested expressions, similar word matches, a previous results list, or topic titles to further define a search.

The basic rules for formulating search queries are as follows.

- Searches are not case-sensitive, so you can type your search in uppercase or lowercase characters.
- You can search for any combination of letters (a-z) and numbers (0-9).
- Punctuation marks such as the period, colon, semicolon, comma, and hyphen are ignored during a search.
- Group the elements of your search using quotation marks or parentheses to set apart each element. You cannot search for quotation marks.



When searching for words in Help topics, you can choose to have each occurrence of the word or phrase highlighted in the topics that are found. To highlight all instances of a search word or phrase, on the Help toolbar select Options | **Search Highlight On**.

To run a simple search

Follow these steps to run a simple search.

1. Select the **Search** tab.
2. Type the word or phrase you want to find.
3. Press ENTER or click **List topics**.
4. To view a found topic, double-click it or select the topic and click **Display**.

Advanced search features

The following advanced search features are available:

- **Boolean operators** – You can include Boolean operators in your search. To insert a Boolean operator in your search, click the arrow next to the search text box and select **AND**, **OR**, **NOT**, or **NEAR**.
- **Advanced search options** – Use the check boxes at the bottom of the **Search** tab to select advanced search options **Search previous results**, **Match similar words**, and **Search titles only**.



For more information about advanced search features, refer to the *Searching the Help* topic.

Use the Favorites tab

It might be helpful to maintain a list of favorite Help topics that you reference frequently. Complete the following steps to add topics to a list, return to a favorite topic, rename a topic, or remove a topic.

Add a topic

Follow these steps to add a topic to your list of favorites.

1. Locate the Help topic you want to make a favorite topic.
2. Select the **Favorites** tab and click **Add**.

Return to a favorite topic

Follow these steps to open a topic in your list of favorites.

1. Select the **Favorites** tab and find the topic in your list.
2. Double-click the topic or click **Display**.

Rename a topic

Follow these steps to rename a topic in your list of favorites.

1. Select the **Favorites** tab.
2. Right-click the topic and select **Rename**.
3. Type a new name and press ENTER.

Remove a favorite topic

Follow these steps to remove a topic from your list of favorites.

1. Select the **Favorites** tab.
2. Select the topic and click **Remove**.

Use the Glossary tab

The glossary provides an alphabetized list of terms and definitions related to Barr EOM. Complete the following steps to use the glossary.

1. Select the **Glossary** tab.
2. Scroll through the list of glossary entries.
3. Select a term from the list and view the definition in the lower portion of the **Glossary** tab.



You can also search for a glossary term by typing the first letter of the word you are looking for. The **Term** window will focus on words beginning with that letter.

5.3 Get more out of HTML Help

These tips will help you find more information when using HTML Help:

- To link to another topic, a Web page, a list of other topics, or a program, click the colored, underlined words.
- To view topics that contain related information, use the “See also:” and “What do you want to do?” topic links.
- To see if a word or phrase contained in a topic is in the index, select the word, and then press F1.
- If you use a particular Help topic often, you can add it to your favorites list.
- Right-click the **Contents** tab or **Topic** pane for shortcut menu commands.

5.4 Copy or print a Help topic

When HTML Help is displayed, you can copy or print Help topics.

Copy a Help topic

You can copy Help topics to the Clipboard with one of these methods. You can paste the topic text into a text editor, such as Microsoft Word, or into an email message.

1. In the topic pane, right-click anywhere in the topic you want to copy and click **Select All**.
2. Right-click again, and then select **Copy**. The topic will be copied to the Clipboard.



If you want to copy only part of a topic, select the text you want to copy, right-click, and then select **Copy**.

3. Open the document you want to copy the topic to.
4. Place the pointer where you want the information to appear.
5. On the menu bar, select Edit | **Paste**.

Print a Help topic

You can print a Help topic with one of these methods:

- To print the currently displayed topic, click **Print** on the Help toolbar.
- In the topic pane, right-click anywhere in the topic and select **Print**.
- From the **Contents** tab, right-click a topic, and then select **Print**. You will be given the option of printing only the current topic, or printing the current heading and all subtopics.



When printing an HTML Help topic, you can control the margins and headers and footers. On the Microsoft Internet Explorer's menu bar, select **File | Page Setup** to access these features. Changes made in Internet Explorer affect printing from the Help view. Use the **?** on the **Page Setup** dialog box to learn more about the features.

5.5 Customize your Help

As with any window, you can easily change the size and location of the Help viewer. In addition, you can resize the navigation and topic panes and set color, font, and accessibility options.

Show or hide the navigation pane

Change the visibility of the navigation pane as follows:

- Click **Hide** to close the navigation pane from view.
- Click **Show** to display the navigation pane.

Resize the navigation or topic pane

Follow these steps to change the size of the navigation pane or the topic pane.

1. Point to the divider between the two panes.
2. When the pointer changes to a double-headed arrow, drag the divider right or left.

Resize the Help viewer

Follow these steps to change the size of the Help viewer.

1. Point to any corner of the Help viewer so that the pointer changes to a double-headed arrow.
2. Press the left mouse button and drag up, down, left, or right. The viewer is resized after you release the mouse button.

Change colors, fonts, and accessibility options

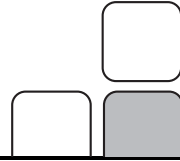
Follow these steps to change the colors, fonts, or accessibility options of your viewer.



Changing these settings will also change your settings for Internet Explorer.

1. On the Help toolbar, select **Options | Internet Options**.
2. On the **General** tab, click **Colors, Fonts**, or **Accessibility**.
3. Select the options you want, and then click **OK**.
4. To apply the new settings, click **OK** in the **Internet Options** dialog box.

Glossary



action

A process in a business rule, alert rule, or output process.

adapter

Add-on equipment you can plug into a computer so that the computer can connect to another device.

ADM

Acronym for Advanced Document Modification. This is a method for implementing Compart custom units for the purpose of extracting document variable information, splitting, joining, or page modification of documents that is not possible without a custom unit. ADM can be executed in a business rule or output process.

AFP

Abbreviation for Advanced Function Presentation. A type of document data stream that is portable. AFP is not a printer data stream, but you can view or print AFP documents. Historically, AFP was a mainframe data format. Files in AFP format can be generated by mainframe document-composition tools and print utilities. It can also be generated by computer utilities.

alert rule

Allows administrators to configure advanced alert options for when certain events happen. This is particularly useful for monitoring printer states.

business rule

A process or series of processes that are applied to a document when it is received into Barr EOM

channel stop

A code (from 1-12) assigned to lines on a form. When a printer encounters a command to advance to a channel stop, the print head moves to the next line identified by the channel stop and gets ready to print. Channel Stop 1 usually indicates the top of the form or the first line where the printer will begin printing. Channel Stop 9 or 12 usually indicates the last printable line on the page (about three lines above the bottom).

code page

In MS-DOS versions 3.3 and later, a table that relates the binary character codes used by a program to keys on the keyboard or to the appearance of characters on the display. Code pages are a means of providing support for character sets and keyboard layouts used in different countries.

document

Any entity that is received into Barr EOM. Examples include reports, printable documents, emails, binary files to be distributed, etc.

document columns

Displays document properties.

document property

Information that is stored outside of a document that pertains to the document, such as document owner, number of pages, etc.

EBCDIC

Acronym for Extended Binary Coded Decimal Interchange Code. An IBM code that uses 8 bits to represent 256 possible characters, including text, numbers, punctuation marks, and transmission control characters. It is used primarily in IBM mainframes and minicomputers.

FBA

Acronym for Fixed Block Architecture.

FBM

Acronym for Fixed Block with Machine carriage control.

FCB

Acronym for Forms Control Buffer. A buffer that controls the vertical format of printed output. The FCB can include information about the number of lines per page, lines per inch, and channel stops.

FTP

Abbreviation for File Transfer Protocol. In TCP/IP, a program protocol used to transfer files to and from host computers. FTP requires a user ID and perhaps a password to access files on a remote host system. FTP assumes that TCP is the underlying protocol.

host

A large computer that controls the communications network, stores databases, and has a large computing and memory capacity. Other computers can connect to the host to share its resources.

IPDS

Abbreviation for Intelligent Printer Data Stream. A printer data stream generated from AFP documents and resources by the Print Services Facility (PSF).

IPP

Acronym for Internet Printing Protocol. A specification for transmission of documents to printers through the Internet.

LAN

Acronym for Local Area Network. A high-speed communications network within a limited geographic area. LANs link several computers together within a single building or campus. (In contrast, a wide area network might span hundreds or thousands of miles.)

LCDS

Abbreviation for Line Condition Data Stream. An LCDS print job or print file is line data (text) with some text-based Xerox commands included, such as DJDE (Dynamic Job Descriptor Entry) commands.

LDAP

Acronym for Lightweight Directory Access Protocol. A network protocol designed to extract information from a hierarchical directory. It allows users to search data to find information, such as a user name, e-mail address, or other contact information.

LPD

Abbreviation for Line Printer Daemon. The remote printer server that supports printing by other hosts on a printer local to your host.

LPR

Abbreviation for Line Printer Request. The UNIX print command. This command does not actually print files, but rather copies them to a spool area from which a daemon copies them to the printer.

mainframe

A large central computer that offers a full set of computing services. The term originated at a time when the central processor, memory, and input/output channels were located in a central housing called the mainframe. Synonymous with *host*.

Metacode

A data stream that provides all-points addressability on Xerox centralized printers. Metacode is a block variable, print file format similar to the mainframe format RECFM=VBM. Metacode files are generated with host and computer programs.

network

An arrangement of nodes and connecting branches for information interchange.

NJE

Abbreviation for Network Job Entry. The peer-to-peer connection that mainframes use to exchange print and job data. NJE is more common than Remote Job Entry (RJE), which uses a mainframe-to-remote connection.

port

An access point for data entry or exit. A port is also a connector on a device to which cables for other devices, such as printers, are attached.

port monitor

A program that monitors Windows printer ports. A port monitor is used when files are directed from the Windows spooler to a destination device.

program

Software that operates in tandem with a program window. When a user starts the program window, the program starts. When a user exits from the program window, the program stops. Contrast with *service*.

remote

A computer or other device located in another place (room, building, or city), but accessible through a cable or communications link.

RJE

Abbreviation for Remote Job Entry. A computing environment in which you can create programs and data on the computer, transmit them to the mainframe, receive the printouts at high speed on disk or printers, and control the status of jobs by using remote operator commands.

service

A program that operates independently of a program window. A user can start the program without opening the program window. A user can exit from the window without affecting program operation. Contrast with *program*.

SNA

Abbreviation for Systems Network Architecture. The description of logical structure, formats, protocols, and operational sequences for transmitting information units through and controlling the configuration and operation of networks.

SNMP

Acronym for Simple Network Management Protocol. A widely used network monitoring and control protocol.

URI

Acronym for Uniform Resource Identifier. A character string used to identify a resource (such as a file) from anywhere on the Internet by type and location.

variable

A temporary storage location used when extracting data from a document. Variables can be used to test conditions to effect a burst action. Variables are also used to modify a document property value.

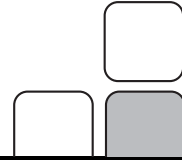
VBA

Acronym for Variable Block Architecture.

VBM

Acronym for Variable Block with Machine carriage control. This is a standard mainframe file format.

Index



@

- @counter function · 288
- @dateTimeToString function · 282
- @lookupCsv function · 283
- @parse function · 284
- @schedule function · 286
- @stringToDateTime function · 287

A

- Activate the license · 302
- Ad hoc rules · 197, 269–82
- Adapter · 359
- Administration
 - application · 297
 - initial setup · 59–65
- Alert rules · 51, 216–21

B

- Backup Barr EOM · 341, 343
- Barr EOM concepts · 47
- Barr EOM database · 6
- Barr EOM DBM Service · 7
- Barr EOM Input Service · 7
- Barr EOM Output Service · 8
- Barr EOM Rules Agent Service · 9
- Barr EOM services · 7
- Barr EOM SNMP Service · 8
- Barr EOM Windows Port Monitor · 9
- Billing accounts · 51, 300
- Business rules · 51, 221–68

C

- Components · 6
- Computer requirements · 11
- Configure
 - ad hoc rules · 269–82
 - alert rules · 216–21

- business rules · 221–68
- columns · 299
- destination groups · 75
- destinations · 76–113
- device groups · 211
- document folders · 183
- EOM Console grids · 59–70
- file store · 23
- global document properties · 300
- source groups · 128
- sources · 129–68
- Copyright · ii
- Costing · 51
- CSV file · 114, 169

D

- Deactivate EOM DBM components · 304
- Delete documents · 191
- Destination groups · 75
- Destination State · 74, 75, 127, 179, 211
- Destination types · 8, 48
- Destinations · 70–124
 - configure · 76–113
 - configure columns · 119
- Document Library · 115
- Email · 76
- EOM · 79
- FTP · 84
- import · 114
- IPDS · 87
- IPP · 91
- LPR · 93
- manage · 120
- Network Folder · 96
- security · 117
- Socket · 105
- WebSphere MQ · 108
- Windows Queue · 111
- Detect printers · 64
- Device groups · 211
- Devices · 208–16

- manage · 214
- Document folders · 183
- Document Library · 115
- Document State · 180, 188
- Documents · 48, 175
 - configure columns · 186
 - manage · 188
 - monitor · 187
 - properties · 300
 - security · 184

E

- EOM Console · 9, 52
 - configure grids · 59–70
 - security · 63
- EOM Desktop Client · 10
- EOM license · 301
- EOM security roles · 59, 60, 297
- EOM Web Interface · 9

F

- Failover printing · 5
- Failover profiles · 50, 193
- Features · 3
- File stores · 50
- Filters · 66
- Functions · 282–88

G

- Grid layouts · 70

H

- HTML Help · 353–58

I

- Import
 - destinations · 114
 - sources · 169
- Input types · 8, 47
- Install
 - license · 301
 - on a failover cluster · 38
 - on a server farm · 25
 - on a single machine · 13
 - software · 13

K

- Knowledgebase · v

L

- Layouts · 70
- Library application · 181
- Library filing profile · 193
- Load balancing · 5

M

- Manage users · 309
- Message Console · 52, 293
- Monitor documents · 187

N

- Notification profile · 195

O

- Output processes · 50, 196
- Output types · 8, 48

P

- Product components · 305

Q

- Quota management profiles · 51
- Quota profiles · 332

R

- ReleaseAnywhere · 5
- Remove Barr EOM · 44
- Reports application · 203
- Reprint documents · 192
- Resources · 344–52
- Restore Barr EOM · 342
- Restore documents · 192
- Restore Windows queues · 331
- Retain period · 197
- Route documents · 189
- Rules
 - ad hoc rules · 269–82
 - alert rules · 216–21
 - business rules · 221–68

S

- Save layouts · 70
- Schedule output · 193
- Schedule tasks · 288
- Security · 50
 - destinations · 117
 - documents · 184
 - EOM Console · 63
 - EOM roles · 60
 - sources · 170
- Services · 7
- Set general preferences · 336
- Software version · i, vi
- Source groups · 128
- Source State · 128
- Source types · 8, 47
- Sources · 124–74
 - configure · 129–68
 - configure columns · 172
 - Email · 129
 - EOM · 133
 - FTP · 137
 - import · 169
 - LPD · 141
 - manage · 173
 - Network Folder · 146
 - security · 170
 - Socket · 150
 - Web Upload · 154, 157
 - WebSphere MQ · 161
 - Windows Queue · 165
- System requirements · 11

T

- Tasks
 - create reports · 288
 - schedule ad hoc tasks · 288
- Technical Support · v
- Trace data · 293
- Trademarks · ii

U

- Uninstall the license · 304
- User balances · 51
- Users and groups · 309

V

- View documents · 188

- Viewer utilities · 340

W

- Windows queues · 328, 332

Notes: